



COUPA SUPPLIER PORTAL

PO Backed Invoice Supplier Guide

Table of Contents

Coupa Supplier Portal (CSP)2

 Registering for CSP2

 Updating Your Company Profile6

 Inviting Additional Users6

 Adding a Remit To Address7

 Purchase Orders.....9

 Invoices.....18

 Custom Views20

Coupa Supplier Portal (CSP)

Registering for CSP

Registering for the Coupa supplier portal provides an easy way to manage information, view purchase orders, and create and manage invoices and online catalogs. You will receive an email notification with an invitation to connect to the Coupa Supplier Portal, similar to the example below.



Ace Corporation would like to be connected with you as a trading partner on Coupa Supplier Network. You will be able to manage your company information and collaborate more efficiently when we're connected.

Coupa Support
Ace Corporation


To confirm this request, please click the link below:


<https://supplier-demo.coupahost.com/signup/cba19cd2811fbee4d8b148fb2828dc8ed7091fb8>






-
1. Click the link provided in the email to register. From the registration site, you can also request an invitation.
 2. Once you have registered, log in using your credentials.

Supplier Portal Home Page

After logging in, you will see the supplier portal home page. The CSP home page provides a snapshot of your company's info. Companies searching for potential suppliers on the CSP will see only public profiles.


Marketing Masters




 About
  Industry
  Website
  Established
  Employees

[Improve Your Profile](#)


About

Public Profile





<https://csn-3-1-0.coupadev.com/suppliers/public/22>


Merge Accounts

It looks like your company has more than one CSN account. Consider merging them so buyers can identify your company with confidence.

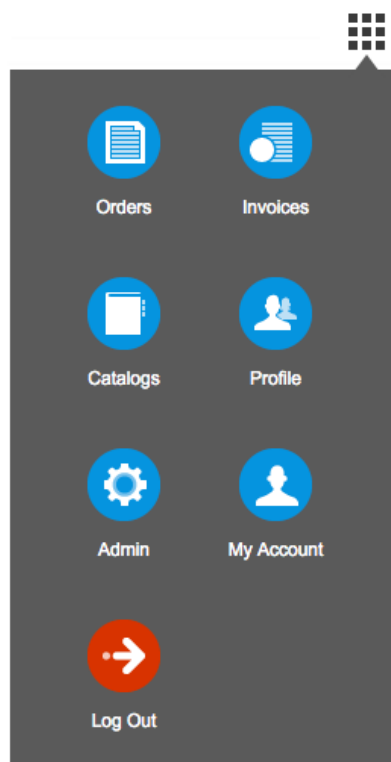

Latest Customers

Coupa

Item	Description
Default Public Profile	Displays your company's public profile information.
Merge Accounts	Allows you to consolidate accounts if you have more than one on the supplier portal.
Latest Customers	Displays a list of your current customers.
	The Menu button allows you to navigate within the CSP.
	Use the Notification button to set up notification preferences.
	When you have a new alert Notifications display in red with the number of new alerts.
	The Help button displays the online help and help tour.

Menu

The Menu button helps you navigate through the system. From the Menu, you can create invoices, update your company's profile, and invite additional users to join the CSP.



Item	Description
Orders	This is where you can find purchase orders sent by your customers.
Invoices	This is where you create and manage invoices to send to your customers.
Catalogs	This is where you create and manage customer-specific catalogs
Profile	This is where you create, modify, and manage your public and customer-specific profiles, and manage which remit-to addresses each customer can use.
Admin	This is where you can manage users, merge requests, and your remit-to addresses
My Account	This is where you can manage your person profile.
Log Out.	Use this to log out of the CSN.

Notifications

You can view new notifications and make changes to your notifications preferences. Click **Notifications > gear icon** to access the Notifications Preferences page. Here, you can see the types of notifications you can select from, and how you want to view them, via email or the CSP. If neither is selected, notifications for that item will not be sent.

Notification Preferences

Catalogs

Catalog Rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email
Catalog About to Expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email
New Catalog Comment	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Catalog Approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email

Easy Form Response

Form Response Approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Form Response Rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Supplier Information Updated	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

Invoices

Invoice Paid	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Invoice Approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
New Invoice Comment	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Invoice Rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

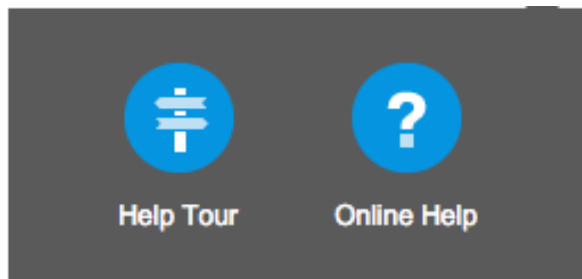
POs

New PO Comment	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
----------------	--	---

*If you choose not to receive online notifications, you can go to **Notifications > See all** to view them in your My Notifications page.*

CSP Help and Support

For additional information while using the CSP, click **Help > Online Help**. Here, you will find helpful topics and definitions for using the supplier portal. You can also click. **Help > Help Tour** to see a quick navigation demo of the supplier portal.



If you require technical assistance, please send an email to supplier@coupa.com.

Updating Your Company Profile

Using CSP you can easily update your company's profile.

1. From the Menu, click **Profile**.
2. Select the profile you wish to edit from the **Profile** drop down menu.
3. Click **Edit Profile**. Make any desired changes to your profile.
4. Click **Save** when you have finished making changes.

Fields marked with an asterisk () are required fields.*

Inviting Additional Users

Using the supplier portal, you can invite additional users in your company access to the CSP.

1. From the Menu, click **Admin**.
2. Click **Invite User**.

×

Invite User

First Name

Last Name

* Email

Permissions

Customers

☒ All
 ☒ Admin
 ☒ Orders
 ☒ Invoices
 ☒ Catalogs
 ☒ Profiles

☒ All
 ☒ Coupa

Cancel

Send Invitation

- Enter the user's information.
- Select which permissions the user should be able to access.
- Select which customer(s) the user should be able to access.
- Click **Send Invitation**. The employee will receive an email notification, with a link to register.

*To deactivate a user, you must edit the user record and select **Deactivate User**.*

Adding a Remit To Address

CSP includes remit-to addresses as part of electronic invoice compliance. You must add a remit to address before you can create an invoice.

- From the Menu, click **Admin**.

[cym.sanguinet+js@coupa.com](#)

Admin

Users

Merge Requests

Remit To

Add Remit To

Remit-To Address	Customers
<div>Remit To Location</div> <div>ACME Corp</div> <div>R002</div> <div>4321 Main Street</div> <div>San Mateo CA</div> <div>United States</div> <div>94402</div> <div>Preferred Language: US English</div> <div>Manage</div>	

Coupa

 Coupa |

2. Click **Remit To** link.
3. Click **Add Remit To**.

Create Remit To Address ✕

Remit To Name

Remit To Code

Address *

Remit To Contact

Assign Customers

You are about to create a remit to address to use for invoicing, however it won't be sent to your customer until you include it on an invoice.

Cancel
Add

4. Once you have filled out the remit to address fields, click **Add**.

Address (information required)

Item	Description
Remit To Name	A unique easily identifiable user-friendly name.
Remit To Code	Use this field to tie your CSP remit-to address with the corresponding address in your ERP.
Address Line 1, 2	Standard address information.
City	Name of the city.
State	Name of the state.
Postal Code	Five digit postal code.
Country	Country of origin.
Tax Country	Determines the origination country for tax purposes.

Remit To Contact

This is optional contact information for the remit-to address.

Assign Customers

Here, you can choose which customers will be able to see a specific remit-to address.

If you merge accounts, your remit-to addresses won't be merged unless you make them available for All customers. Once the merge is complete, you can again assign the remit-to address to the specific customers you want.

Purchase Orders

The purchase orders page is where you work with orders from your customers. The Purchase Orders table lists all the POs you've received from that customer. You can use the search bar to filter the list with a search term, or click the View dropdown to perform advanced filtering. See [Custom Views](#) for more info about advanced filtering.

1. From the Menu, click **Orders**.
2. Click **Orders**. The Purchase Order screen displays all your purchase orders. The first time you use the orders page, you'll have to choose a customer. To see orders from a specific customer, select the customer from the dropdown list just under the menu button. The next time you visit the orders page, it'll return to the last customer you chose.





Select Customer

Ace Corporation
 ✓ Coupa

Purchase Orders

View

All

PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
2759	09/17/15	Issued	None	1 Each of Snow removal three parking lots 12/8	No	500.00 USD	 
2758	09/17/15	Issued	None	1 Each of Snow removal on 1/7	No	250.00 USD	 

3. To view the detail for an individual PO, click the PO number.

Column	Description
PO Number	This is the purchase order number generated by Coupa.
Order Date	This is the date the purchase order was created on.
Status	This is the current status of the purchase order. See the Status table for more information.

Column	Description
Acknowledged	<p>You can choose to let your customer know that you received their PO by selecting the Acknowledged checkbox on the purchase order. When you select the checkbox, the current date appears in the Acknowledge column.</p> <p>This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date will appear.</p>
Items	Items List of items on the PO.
Unanswered Comments	You can now make comments directly on the purchase order for your customers to see. If your customer has left comments that you haven't responded to, you'll get notified here.
Total	This is the total amount of the purchase order.
Actions	Use the gold coins icon 🏆 to flip the PO into an invoice and the red coins icon 🏴 to create a credit note.

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Cancelled	The order has been cancelled, and doesn't need to be fulfilled.
Closed	The issued PO has been received and was then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	There's something wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO has been approved and sent to the supplier.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

If you click on the purchase order number to view the PO, and then use the back button to return to the Purchase Orders page, you'll need to refresh the page to see any changes you made to the PO.

Creating an Invoice

You can create an invoice directly from the purchase order.

1. From **Purchase Orders**, click the gold coin (👉) icon in the Action's column of the PO you wish you create an invoice from.
2. Fill out any required fields marked with an asterisk (*).
3. Use the **Calculate** button to see invoice totals prior to submitting.
4. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.

Create Invoice Create



*Invoice #	<input type="text"/>	*Supplier	Smith Snow Removal
*Invoice Date	01/14/16	*Remit To Address	Smith Snow Removal
Payment Terms	Net 30		555 Grant
Date of Supply	01/14/16		Chicago, IL 60462
*Currency	USD		United States
Delivery Number	<input type="text"/>		United States (US)
Status	Draft	Customer	Coupa
Image Scan	<input type="button" value="Choose File"/> No file chosen	Bill To Address	28 Nevada Blvd
Supplier Notes	<div><div></div></div>		Laughlin, NV 94301
			United States
		Ship To Address	28 Nevada Blvd
			Laughlin, NV 89028
			United States
			Location Code: TEST

Attachments [Add File](#) | [URL](#) | [Text](#)

Type	*Description	Qty	UOM	*Price	Total
	Snow removal on 1/7	1	Each	250.00	250.00

PO Line Contract Billing
 2758-1 SF-Marketing-Assets

Add Line

Subtotal	250.00
Shipping	<input type="text" value="0.000"/>
Handling	<input type="text" value="0.000"/>
Misc	<input type="text" value="0.000"/>
Tax Code	<input type="text" value="0"/> % <input type="text" value="0"/>
Total Tax	0.00
Total	250.00

Item	Description
Invoice #	<p>This is a required field. You will need to enter your invoice number.</p> <p><i>Invoice numbers cannot exceed 16 characters.</i></p>
Invoice Date	The invoice date will default to the date the invoice is created.
Payment Terms	This field displays the code for your current payment terms that were agreed upon between your company and the supplier.
Currency	Displays the currency options for the invoice.
Delivery Number	The delivery number, if available.
Status	The status of your invoice.
Image Scan	Allows you to upload an image to be attach to the invoice.
Supplier Notes	Use this field to enter a message for the invoice approver.
Attachments	<p>Allows you to add various attachments to the invoice.</p> <ul style="list-style-type: none"> • File – This option allows you to upload a document to the invoice. Use the Browse button to upload the file from your desktop. • URL – Use this option to include an external URL. • Text – Use this option to include additional text content. <p><i>Ensure your document is a standard attachment file, not an image. Types of files that can be uploaded: .doc, .docx, .gif, .jpg, .jpeg, .pdf, .png, .tiff, .tif, .xls, .xlsx, .zip, and .txt.</i></p>

Item	Description
Supplier	Auto-populates from the PO with the supplier's name.
Remit To	Auto-populates from the PO with the supplier's remit to address.
Customer	Auto-populates from the PO with the customer name.
Bill To Address	Auto-populates from the PO with the bill to address.
Ship To Address	Auto-populates from the PO with the ship to address.
Line Level Taxation	Allows you to tax line items at different rates if enabled.
Type	Displays the line items type.
Description	Provides a description of the good(s) and/or service(s) purchased.
Qty	Shows the number of items.
UOM	Shows the unit of measure.
Price	Displays the unit price.
Total	Displays the item total.
PO Line	Provides the PO line number associated with the invoice.
Contract	Displays contract information, if any.
Billing	Displays the billing department associated with the PO.
Subtotal	Displays the total price of only the items
Shipping	Displays any shipping costs.
Handling	Displays any handling costs.
Misc	Displays any additional miscellaneous costs.
Tax Code	Provides an editable tax code for the supplier to select when invoicing.

Item	Description
Total Tax	Displays the total tax amount.
Total	Displays the invoice total.

Status	Description
Approved	The invoice has been accepted for payment by the customer.
Draft	The invoice has been created, but hasn't been submitted to your customer yet.
Pending	The invoice is currently with a business approver.
Processing	The invoice is being processed by the AP department, and should be paid soon.
Voided	There's something wrong with the PO. Contact your customer to get the PO back on track.

Creating a Credit Note

If you need to create a credit note, it's best practice to specify a negative quantity for the item to be credited, rather than negative price. This is especially true if you're using 3-way matching, since before the credit can be processed, it will need to be matched against a receipt.

1. From **Purchase Orders**, click the red coin (🪙) icon in the Action's column of the PO you wish you create a credit note from.
2. Fill out any required fields marked with an asterisk (*).
3. Use the **Calculate** button to see credit note totals prior to submitting.
4. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.

Create Credit Note Create

*Credit Note #	<input type="text"/>	*Supplier	Smith Snow Removal
*Credit Note Date	01/14/16	*Remit To Address	Smith Snow Removal
Payment Terms	Net 30		555 Grant
Date of Supply	01/14/16		Chicago, IL 60462
*Currency	USD		United States
Delivery Number	<input type="text"/>		United States (US)
Status	Draft	Customer	Coupa
*Original Invoice #	<input type="text"/>	Bill To Address	28 Nevada Blvd
*Original Invoice Date	<input type="text"/>		Laughlin, NV 94301
Image Scan	<input type="text"/> Choose File No file chosen		United States
Supplier Notes	<div><div></div></div>		
Attachments	Add File URL Text		
		Ship To Address	28 Nevada Blvd
			Laughlin, NV 89028
			United States
			Location Code: TEST

Type	Description	Qty	UOM	*Price	Total
	Snow removal three parking	0	Each	500.00	0.00

PO Line Contract Billing
[2759-1](#) SF-Marketing-Assets

Add Line

Subtotal	0.00
Shipping	0.000
Handling	0.000
Misc	0.000
Tax Code	0 % 0

Item	Description
Credit Note #	This is a required field. You will need to enter your credit note number. <div> <i>Invoice numbers cannot exceed 16 characters.</i> </div>
Credit Note Date	The credit note date will default to the date the it is created.
Payment Terms	This field displays the code for your current payment terms that were agreed upon between your company and the supplier.
Currency	Displays the currency options for the invoice.

Item	Description
Delivery Number	The delivery number, if available.
Status	The status of your invoice.
Original Invoice #	Provides a field to enter the original invoice #.
Original Invoice Date	Provides a date selector to enter the original invoice date.
Image Scan	Allows you to upload an image to be attach to the invoice.
Supplier Notes	Use this field to enter a message for the invoice approver.
Attachments	<p>Allows you to add various attachments to the invoice.</p> <ul style="list-style-type: none"> • File – This option allows you to upload a document to the invoice. Use the Browse button to upload the file from your desktop. • URL – Use this option to include an external URL. • Text – Use this option to include additional text content. <div> <p><i>Ensure your document is a standard attachment file, not an image. Types of files that can be uploaded: .doc, .docx, .gif, .jpg, .jpeg, .pdf, .png, .tiff, .tif, .xls, .xlsx, .zip, and .txt.</i></p> </div>
Supplier	Auto-populates from the PO with the supplier's name.
Remit To	Auto-populates from the PO with the supplier's remit to address.
Customer	Auto-populates from the PO with the customer name.
Bill To Address	Auto-populates from the PO with the bill to address.
Ship To Address	Auto-populates from the PO with the ship to address.

Item	Description
Line Level Taxation	Allows you to tax line items at different rates if enabled.
Type	Displays the line items type.
Description	Provides a description of the good(s) and/or service(s) purchased.
Qty	Shows the number of items.
UOM	Shows the unit of measure.
Price	Displays the unit price.
Total	Displays the item total.
PO Line	Provides the PO line number associated with the invoice.
Contract	Displays contract information, if any.
Billing	Displays the billing department associated with the PO.
Subtotal	Displays the total price of only the items
Shipping	Displays any shipping costs.
Handling	Displays any handling costs.
Misc	Displays any additional miscellaneous costs.
Tax Code	Provides an editable tax code for the supplier to select when invoicing.
Total Tax	Displays the total tax amount.
Total	Displays the invoice total.

Status	Description
Approved	The invoice has been accepted for payment by the customer.
Draft	The invoice has been created, but hasn't been submitted to your customer yet.
Pending	The invoice is currently with a business approver.

Status	Description
Processing	The invoice is being processed by the AP department, and should be paid soon.
Voided	There's something wrong with the PO. Contact your customer to get the PO back on track.

Invoices

Use the invoices page to work with orders from your customers.

Invoice and Payment Status

The invoice list displays all the invoices submitted by your organization to your Coupa customer. Here, you can check approval and payment status.

1. From the Menu, click **Invoices**.

Invoices

<div> Export View All </div>				
Invoice #	Created Date ▾	Status	PO #	Total
03-2015	07/12/15	Approved	None	3,955.00
02-2015	07/12/15	Approved	None	3,672.50
01-2015	07/12/15	Disputed	None	7,345.00
Test12	04/29/15	Disputed	None	11.30
test123	04/29/15	Disputed	None	11.30
Per page 15 45 90				

2. To see invoices for a specific customer, select the customer from the dropdown list just under the menu button. The first time you use the invoices page, you'll have to choose a customer. The next time you visit, it'll return to the last customer you chose.



The Invoices table lists all the invoices you've created for that customer. You can use the search bar to filter the list with a search term, or click the **View** dropdown to perform advanced filtering. See [Custom Views](#) for more info.

Column	Description
Invoice #	This is the invoice order number generated by Coupa.
Created Date	This is the date the invoice was created on.
Status	This is the current status of the purchase order. See the Status List for more information.
PO #	This is the purchase order number generated by Coupa.
Acknowledged	<p>You can choose to let your customer know that you received their PO by selecting the Acknowledged checkbox on the purchase order. When you select the checkbox, the current date appears in the Acknowledge column.</p> <p>This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date will appear.</p>
Items	List of items on the PO.
Total	This is the total amount of the purchase order.
Unanswered Comments	You can now make comments directly on the purchase order for your customers to see. If your customer has left comments that you haven't responded to, you'll get notified here.
Actions	Use the edit icon to make changes to the invoice.

Status	Description
Approved	<p>The invoice has been accepted for payment by the customer. Payment status can be tracked on invoices that have been approved. Click the invoice number to open the invoice. New fields on the header will indicate payment information.</p> <div> <p><i>Approved invoices will reflect payment depending on your payment terms with your Coupa customer.</i></p> </div>

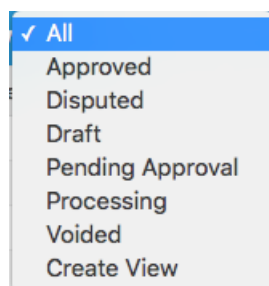
Status	Description
Disputed	The invoice has been disputed or rejected by your Coupa customer. You will receive an email notifying you of the approver's reasons for rejecting the invoice in the Comments field. Disputed invoices cannot be edited in the CSP. A new invoice must be created with a different invoice number because Coupa will not accept duplicate invoice numbers.
Draft	The invoice has been created, but hasn't been submitted to your customer yet.
On Hold	The invoice has been put on hold for AP review.
Pending Approval	The invoice is currently with a business approver.
Processing	The invoice is being processed by the AP department, and should be paid soon.
Voided	There's something wrong with the PO. Contact your customer to get the PO back on track.

Custom Views

A custom view gives you the ability to create a set of advanced search filters, and save them.

Creating a Custom View

1. Go to the Coupa table you want to set up a custom view for.
2. At the top of the table, click the **View** dropdown and select **Create View**.



3. In the next screen, specify the settings you want to use for your custom view, including the filtering conditions to use, the columns to include, and the sorting criteria. If you want to build this view off of another view and tweak those settings, use the **Start with view** option under the **General** settings. Refer to **Custom View Settings**, below, for more details.

Create New data table view

General

Name

Visibility ☒ Only Me
☐ Everyone

Start with view

Conditions

Apply of these conditions:

is

Columns

Available columns	Selected columns
Approval Group	Invoice #
Commented	Created Date
Comments	Status

- Click **Save**.

Custom View Settings

Customize these settings when creating or editing a custom view for a Coupa table.

General	Description
Name	The custom view name, visible from the View dropdown on top of the table.
Visibility	Decide whether this view can be visible to only you or all other Coupa users that can see the main table.
Start with view	Use this option to load another views settings and then tweak them to fit your needs for this view.

Conditions	Description
Apply	<p>All of these conditions: Coupa displays results only for objects that meet all of the conditions you add in this list.</p> <p>Any of these conditions: Coupa displays results for objects that meet at least one of the conditions you add in this list.</p>

Conditions	Description
Conditions	Create conditions based on the data available in Coupa.

Columns	Description
Available columns	This list depends on the table you're working with in Coupa. You can select any of these columns to add into your custom view.
Selected columns	These are all the columns Coupa displays with this custom view. It displays them, from left to right, in the same order that you set them up here.

Default Sort Order	Description
Default Sort Order	Choose the column you want results sorted by and whether to sort them in ascending or descending order.