Quick Reference Guide – Coupa Supplier Portal Overview

Coupa Supplier Portal Basic Function

In this guide:

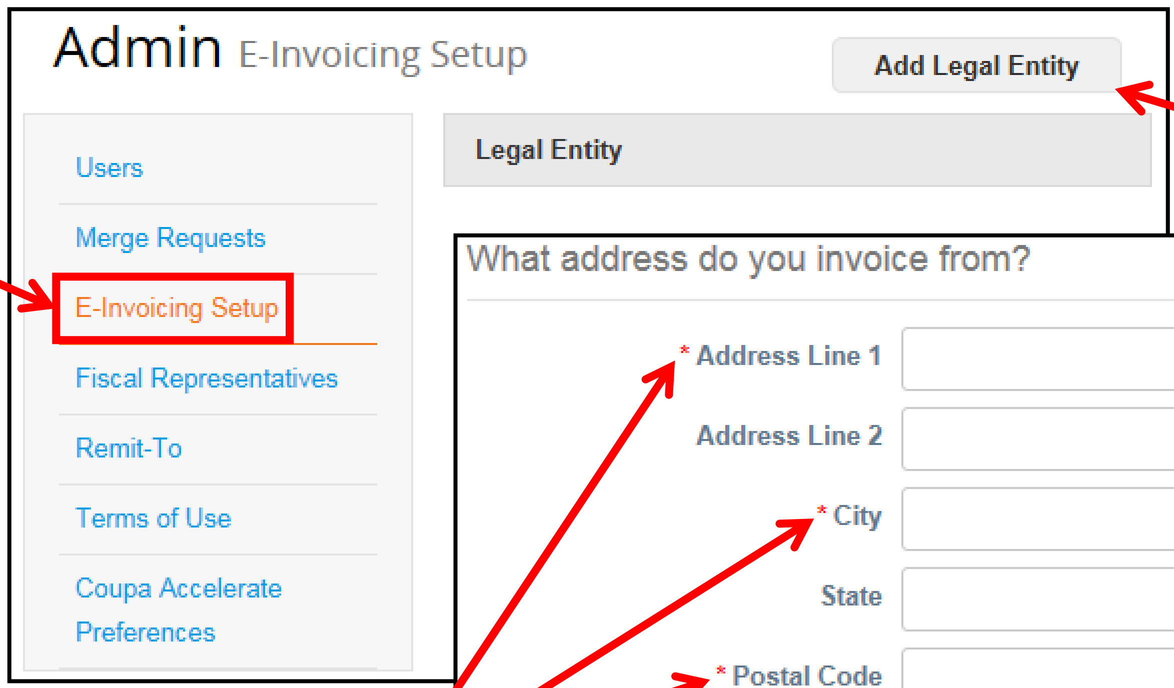
- ✓ **Maintaining Remittance Information**
- ✓ **Adding new Users to the CSP**
- ✓ **How to Create an Invoice**
- ✓ **How to view a Purchase Order**

Coupa provides suppliers with the ability to review Purchase Orders and submit and Invoices electronically. This guide provides an overview of reviewing and making comments on a Purchase Order as well the Invoicing process.

Setting the Remit-To

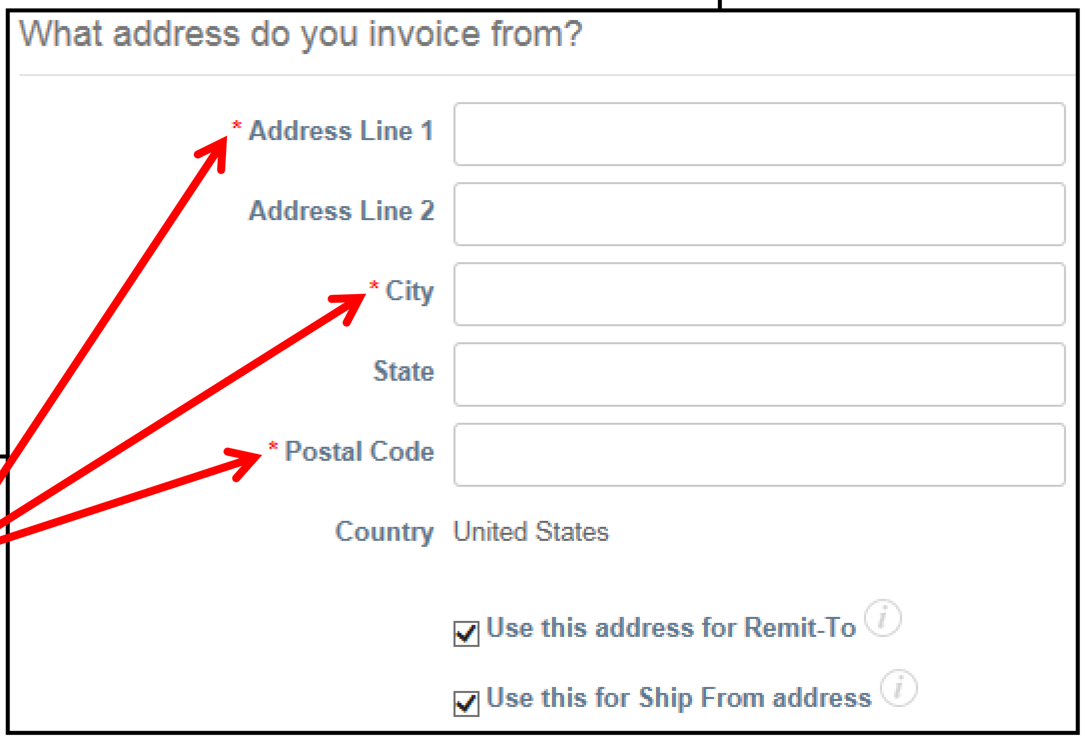
1. From the Coupa homepage, select the "**Admin**" tab.

2. Once in the **Admin** tab select the "**E-Invoicing Setup"** option.



3. Select "**All Legal Entity**" from the yellow status bar that is showing at the top of the screen.

PLEASE NOTE Before a supplier can submit an invoice through the CSP they must setup a Remit-To. The supplier will be asked to enter this info directly after accepting the CSP Invoice.

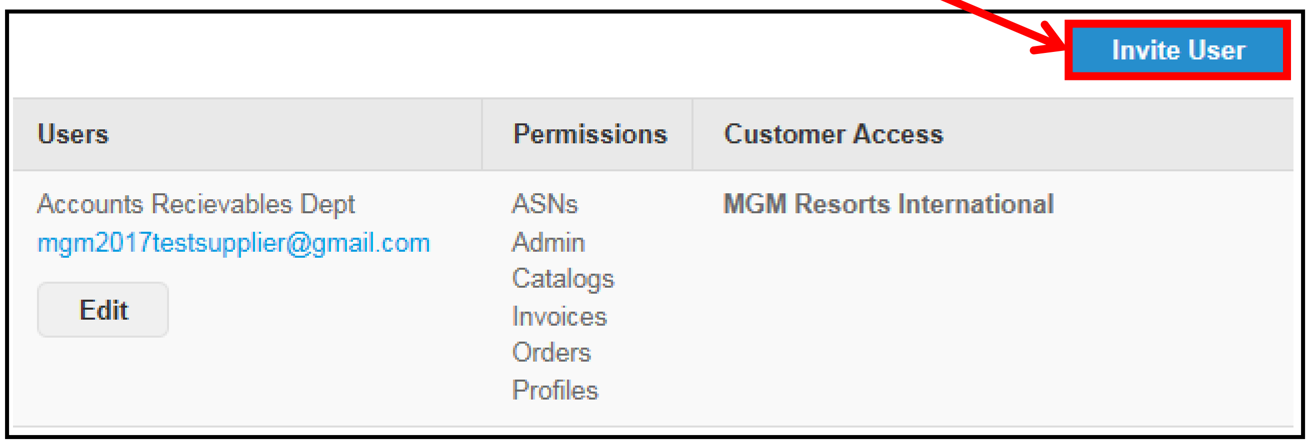


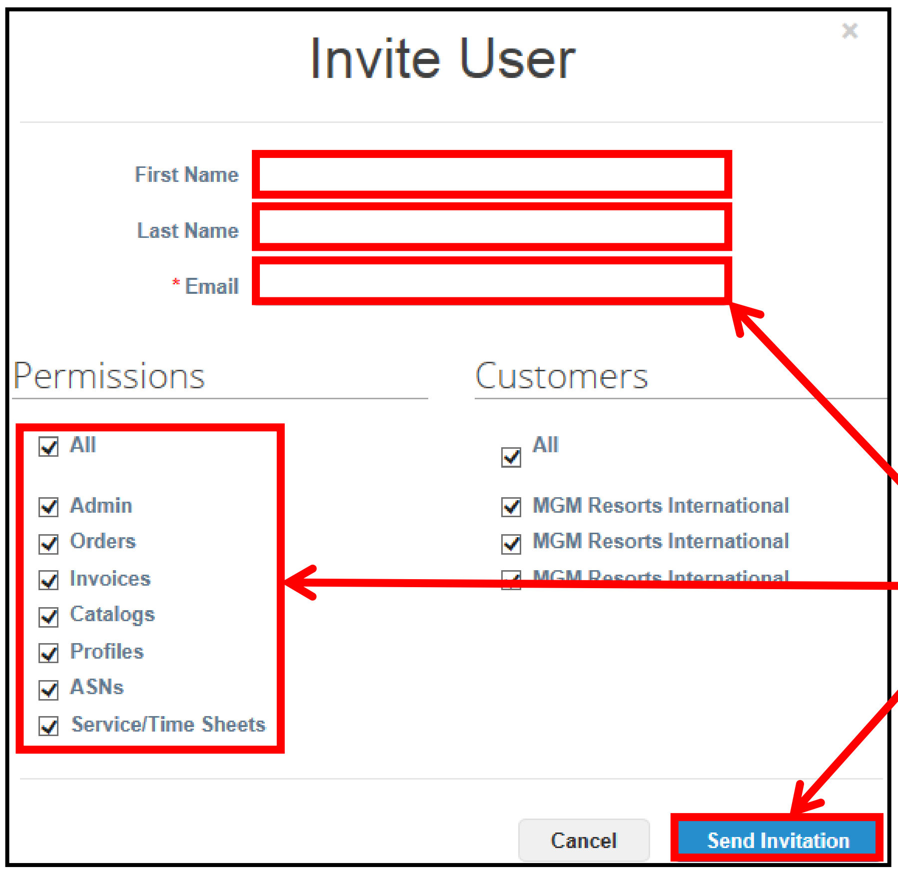
4. There will be several boxes to fill out your information. Any box with a red asterisk is mandatory. Continue the process until you return the **Admin** screen

Adding additional users to the CSP

1. Whomever receives the initial invite to the CSP will be the Admin profile for that specific CSP. The Admin can add additional users by selecting the Admin tab from the home screen

2. Select the **"Invite User"** button





3. Fill in the information and then pick the Permissions the new user should have. When finished select **"Send Invitation."**

Continue to next page

Create and Schedule a Report

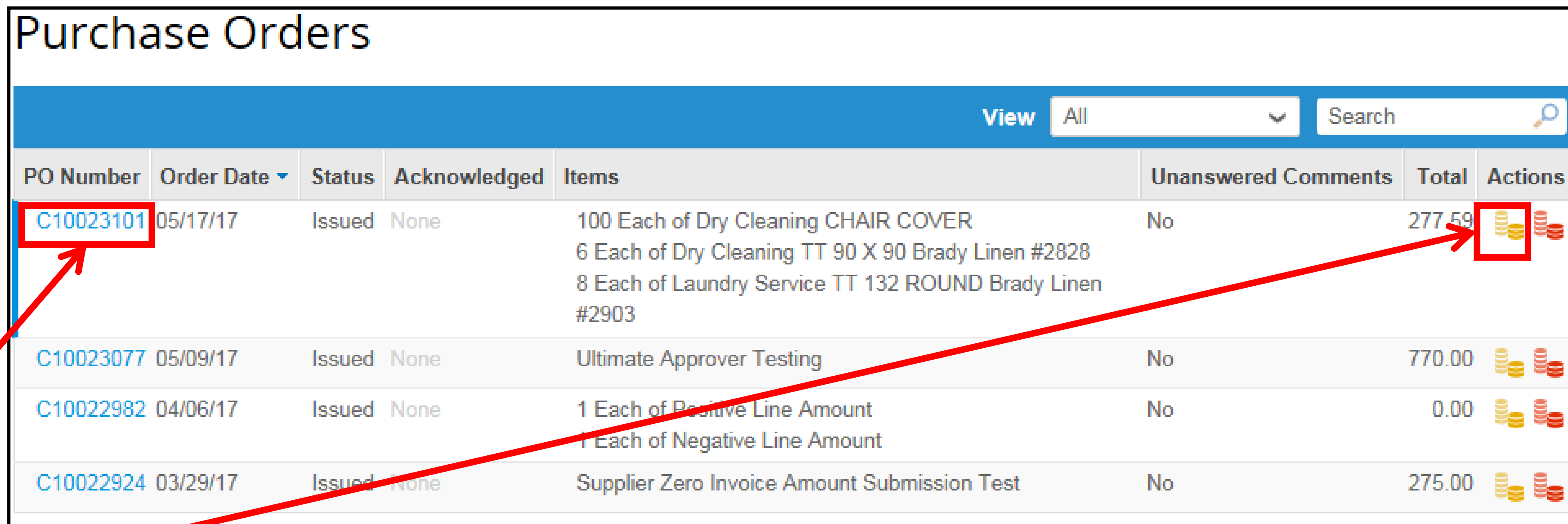
How to Review Purchase Orders

4. You can review Purchase Orders by selecting the "**Orders**" tab from the home screen.

5. From the Purchase Orders screen you will see a list of the PO's that have been issued to the supplier.

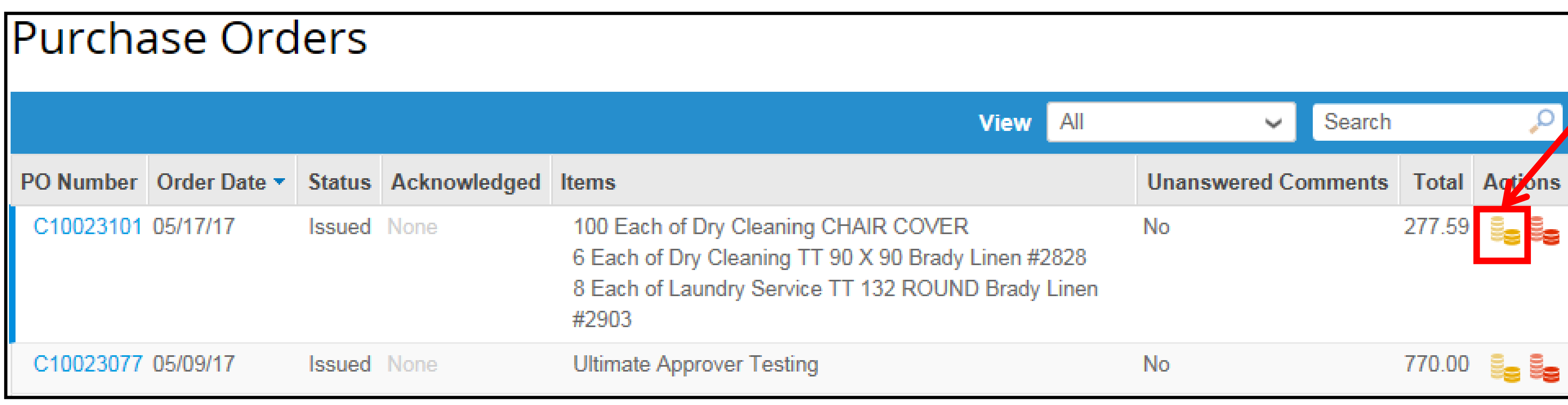
6. Click on the Blue PO number to view the PO details

7. Click the Gold Coins to be directed to the Create Invoice screen.



How to Create Invoices

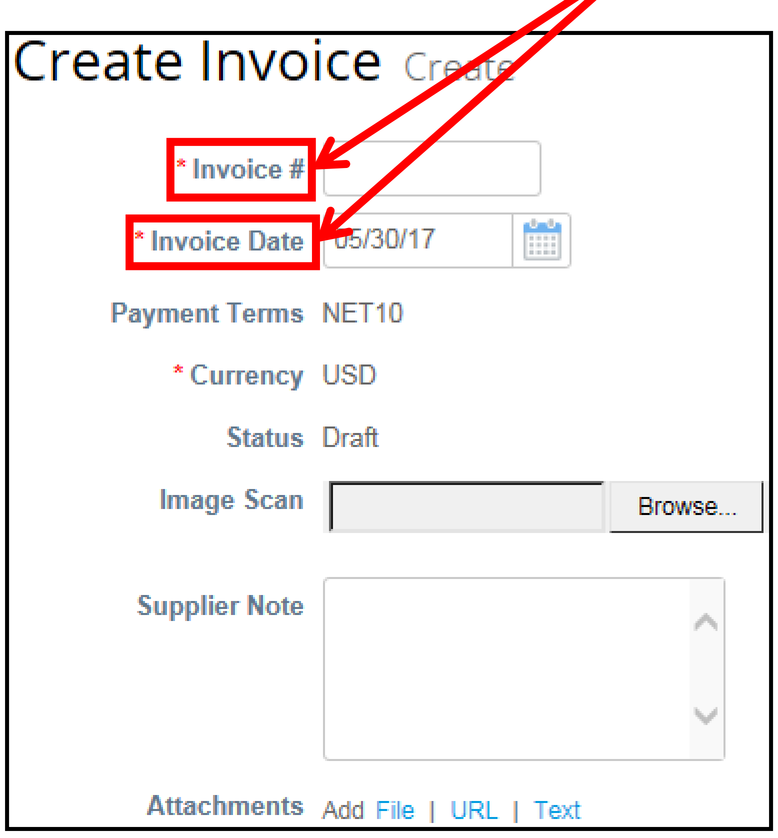
1. The process begins Purchase Orders by selecting "**Orders**" from the home screen.



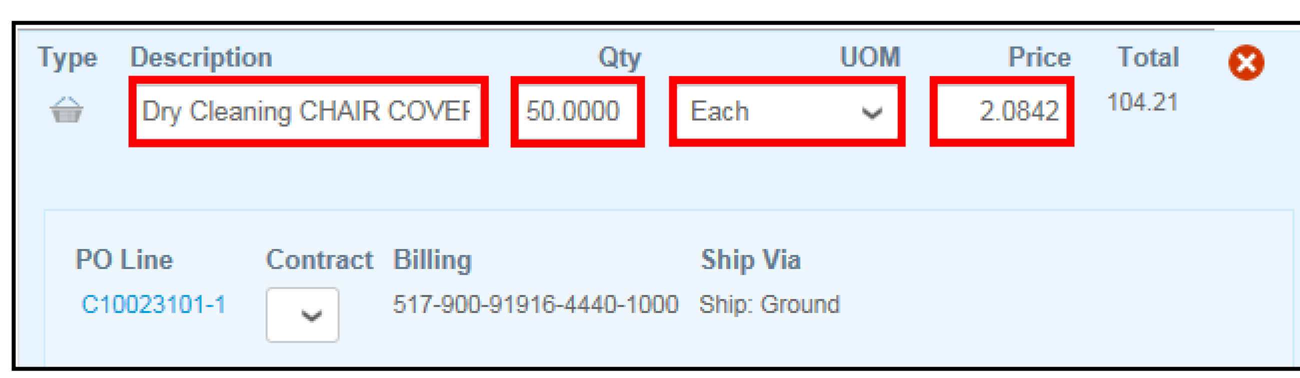
2. Clicking the Gold Coins will go straight to Invoice Creation screen

The gold coins are also visible if you open the PO by clicking on the Blue PO Number.

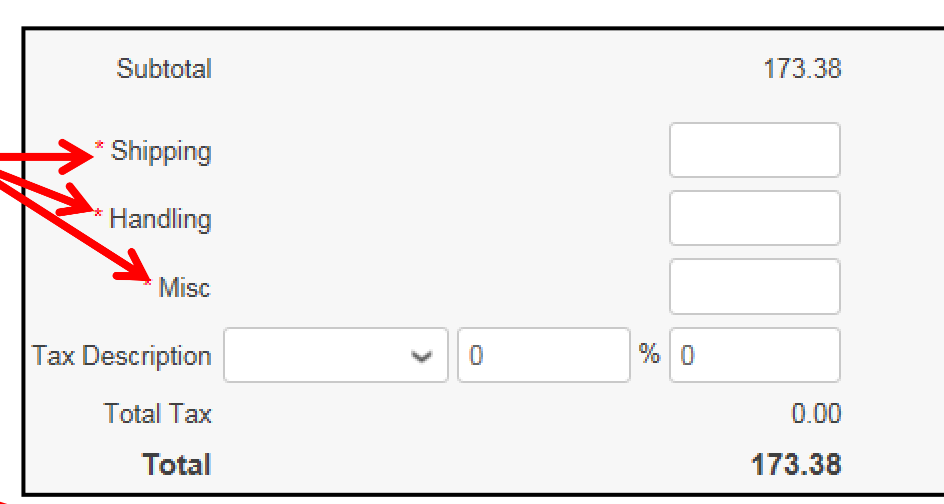
3. Any field with a Red asterisks will need to be filled out.



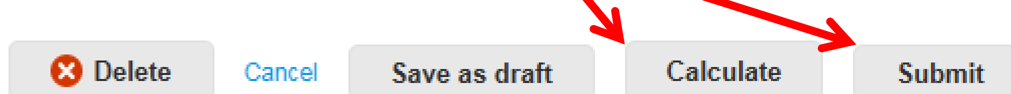
4. Edit the fields to match the details of what is being invoiced.



5. Any additional charges like Tax or Freight will need to be entered under the Subtotal.



6. Once the necessary details have been entered, select Calculate to adjust the total and then click Submit to send the Invoice to MGM for Review.



7. After submitting you can check the status of the invoice by opening the Invoice tab and using the Status Column. Status definitions are available in the CSP Help Section