

Quick Reference Guide – Coupa Supplier Portal Overview

Coupa Supplier Portal Basic Function

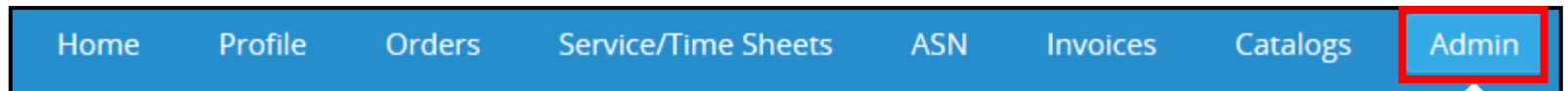
In this guide:

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

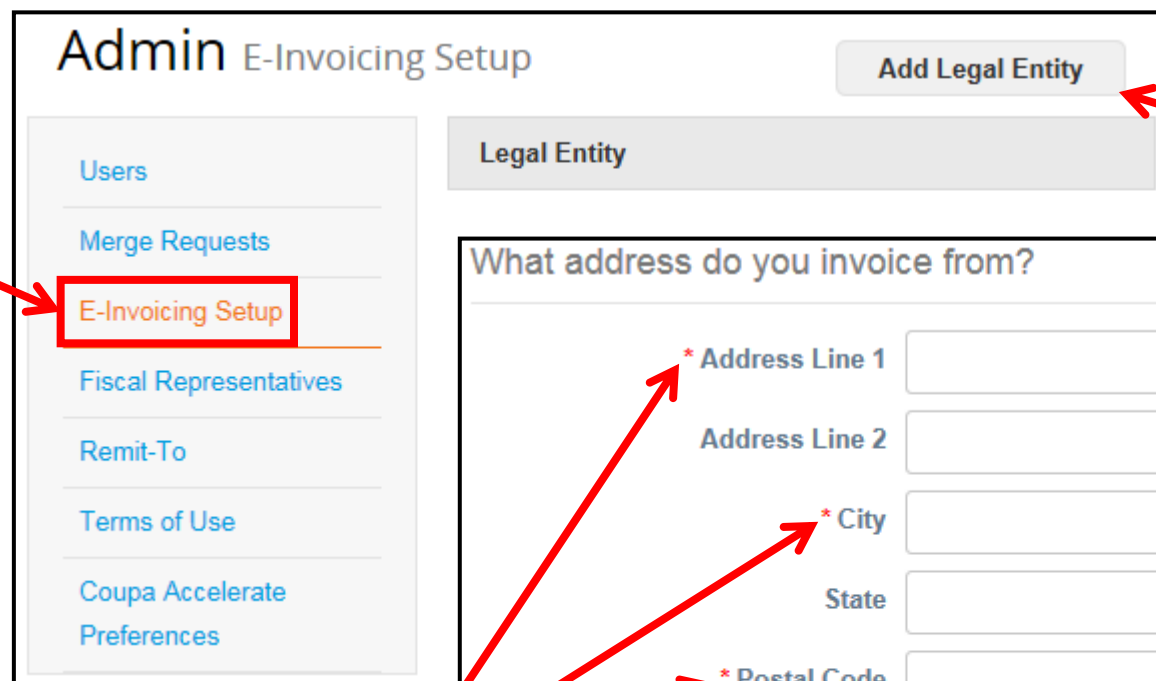
Coupa provides suppliers with the ability to review Purchase Orders and submit and Invoices electronically. This guide provides an overview of reviewing and making comments on a Purchase Order as well the Invoicing process.

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.



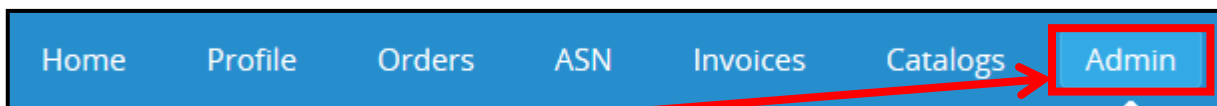
3. Select “All Legal Entity” from the yellow status bar that is showing at the top of the screen.

*****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.

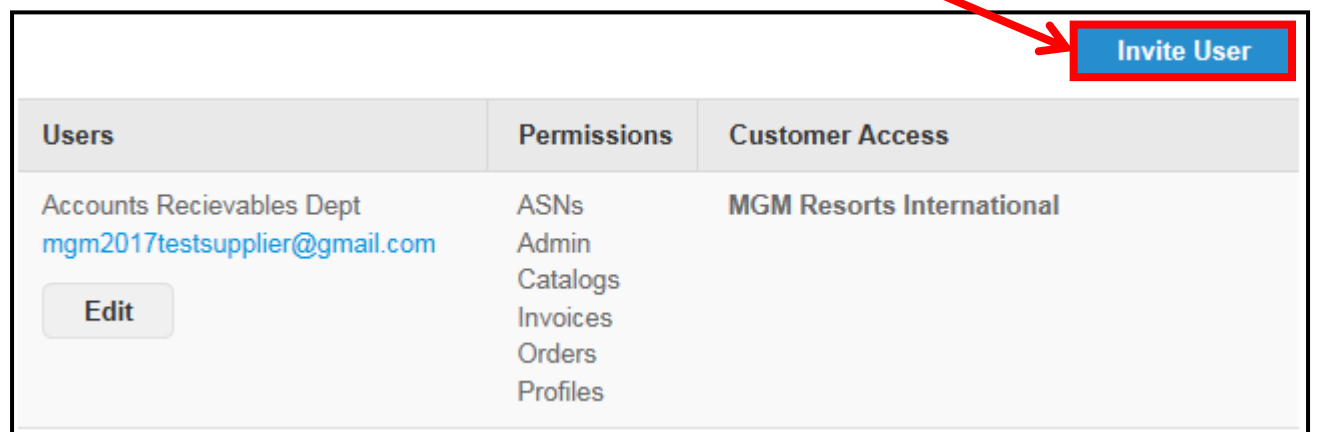
4. There will be several boxes to fill out your information. Any box with a red asterisk is mandatory. Continue the process until you return the Admin screen

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.”

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Create and Schedule a Report

How to Review Purchase Orders

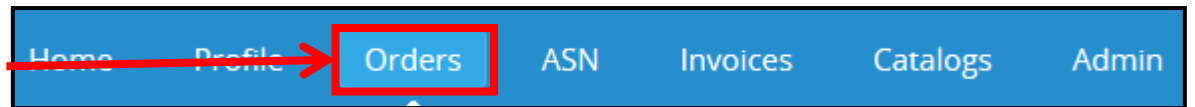


4. You can review Purchase Orders by selecting the “Orders” tab from the home screen.
5. From the Purchase Orders screen you will see a list of the PO’s that have been issued to the supplier.
6. Click on the Blue PO number to view the PO details
7. Click the Gold Coins to be directed to the Create Invoice screen.

PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
C10023101	05/17/17	Issued	None	100 Each of Dry Cleaning CHAIR COVER 6 Each of Dry Cleaning TT 90 X 90 Brady Linen #2828 8 Each of Laundry Service TT 132 ROUND Brady Linen #2903	No	277.59	
C10023077	05/09/17	Issued	None	Ultimate Approver Testing	No	770.00	
C10022982	04/06/17	Issued	None	1 Each of Positive Line Amount 1 Each of Negative Line Amount	No	0.00	
C10022924	03/29/17	Issued	None	Supplier Zero Invoice Amount Submission Test	No	275.00	

How to Create Invoices

1. The process begins Purchase Orders by selecting “Orders” from the home screen.



PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
C10023101	05/17/17	Issued	None	100 Each of Dry Cleaning CHAIR COVER 6 Each of Dry Cleaning TT 90 X 90 Brady Linen #2828 8 Each of Laundry Service TT 132 ROUND Brady Linen #2903	No	277.59	
C10023077	05/09/17	Issued	None	Ultimate Approver Testing	No	770.00	

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.

Create Invoice

* Invoice #

* Invoice Date 05/30/17

Payment Terms NET10

* Currency USD

Status Draft

Image Scan Browse...

Supplier Note

Attachments Add File | URL | Text

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

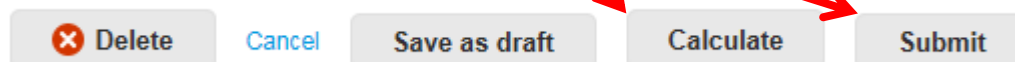
Type	Description	Qty	UOM	Price	Total
	Dry Cleaning CHAIR COVER	50.0000	Each	2.0842	104.21

PO Line: C10023101-1
Contract:
Billing: 517-900-91916-4440-1000
Ship Via: Ship: Ground

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.

Subtotal	173.38
* Shipping	<input type="text"/>
* Handling	<input type="text"/>
Misc	<input type="text"/>
Tax Description	<input type="text"/> 0 % 0
Total Tax	0.00
Total	173.38



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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Testinginvdate5	05/19/17	Approved	C10023101	104.21	No	