Coupa Supplier Portal Manual

April 2024

Contents

01

Course Outline

Description

This course explains how to manage the Coupa Supplier Portal.

Objectives

After completing this course, you will be able to:

1. How to register on Coupa
2. Forward CSP invite
3. Add users on the CSP
4. Deactivate a user on the CSP
5. Merge supplier accounts
6. Manage purchase orders
7. Create invoices and credit notes
8. Understand what a public profile and customer profile is
9. Find support

02

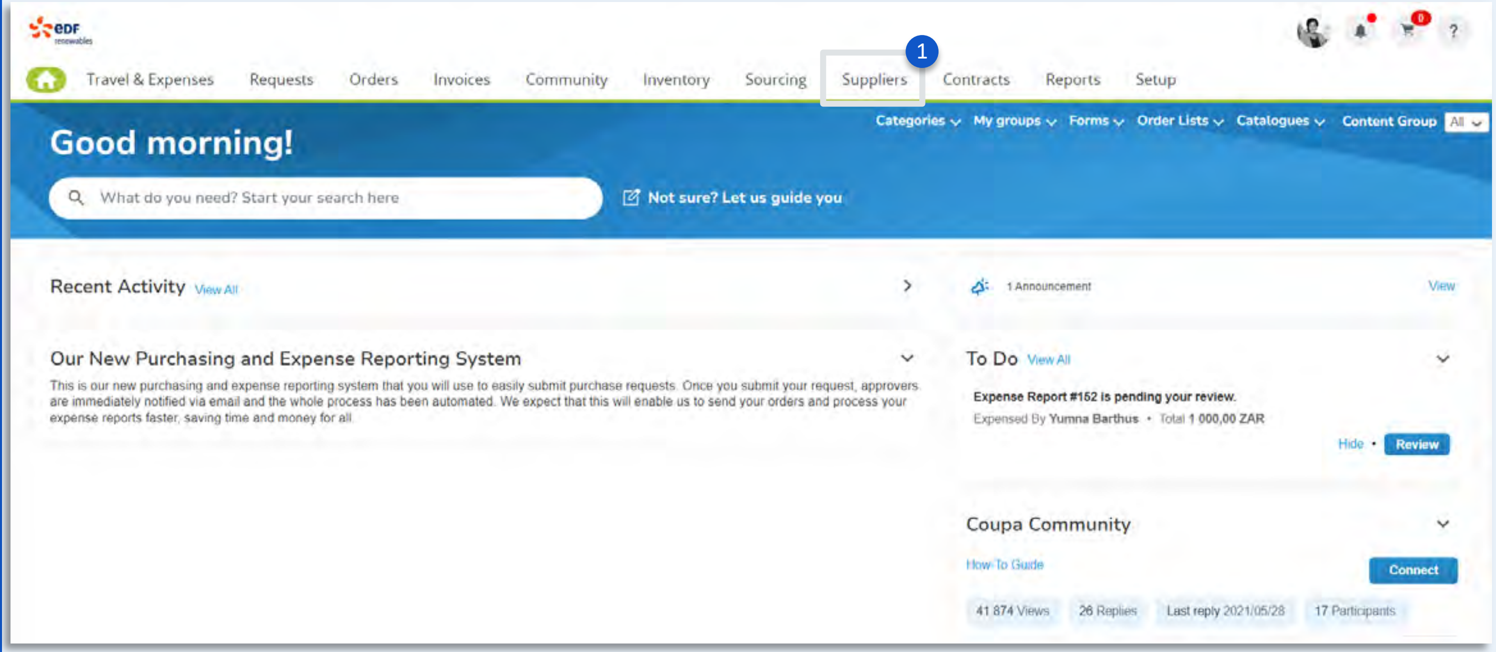
How to Register on Coupa

Sending an Invite to a Supplier

To invite a supplier to the Portal, you need to login to Coupa.

Process Steps:

1. Login to Coupa once you are logged in navigate to the "**Suppliers**" tab

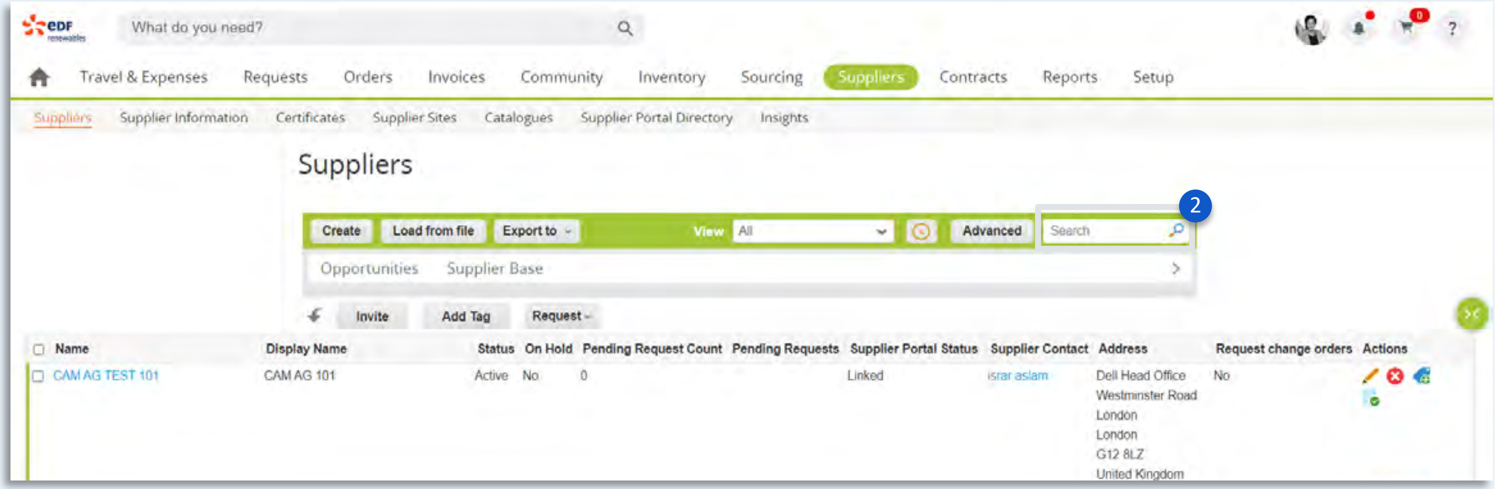


Sending an Invite to a Supplier

To invite a supplier to the Portal, you need to login to Coupa.

Process Steps:

2 Populate the supplier's name you want to search for and send the invite



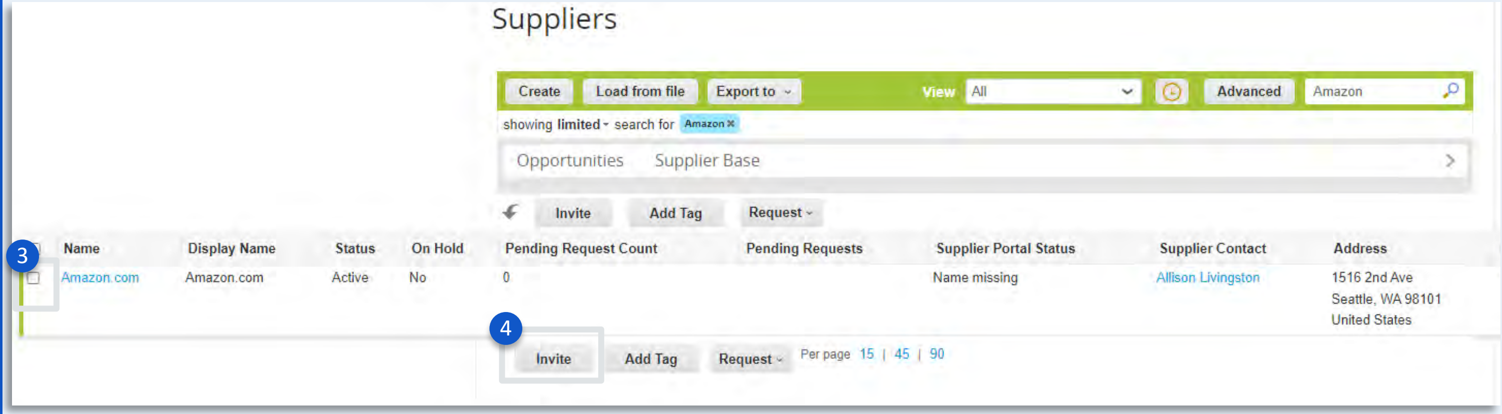
Sending an Invite to a Supplier

To invite a supplier to the Portal, you need to login to Coupa.

Process Steps:

3 Check the box next to the supplier's name

4 Once the box has been checked click on **"invite"** to invite the supplier to the Coupa Supplier Portal



Sending an Invite to a Supplier

To invite a supplier to the Portal, you need to login to Coupa.

Process Steps:

5 The invite mail will be displayed click send invite to send the invite to the supplier

03

Adding users on the CSP

Managing Users: Admin Role

How to manage users on the CSP account.

It is extremely important that an Admin user considers the below when managing users on the CSP

As an Admin user you can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform within their assigned role and for their assigned customers.

The Admin role will allow you to:

- Change a user's name
- Modify a user's permissions
- Give users access to a customer
- Deactivate a user

For auditing purposes, Coupa does not allow users to be deleted, therefore you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

If you deactivate a user you can always reactivate that user later. However, when a user is reactivated the customer access for that user is reset, so you'll have to assign customers to that user again.

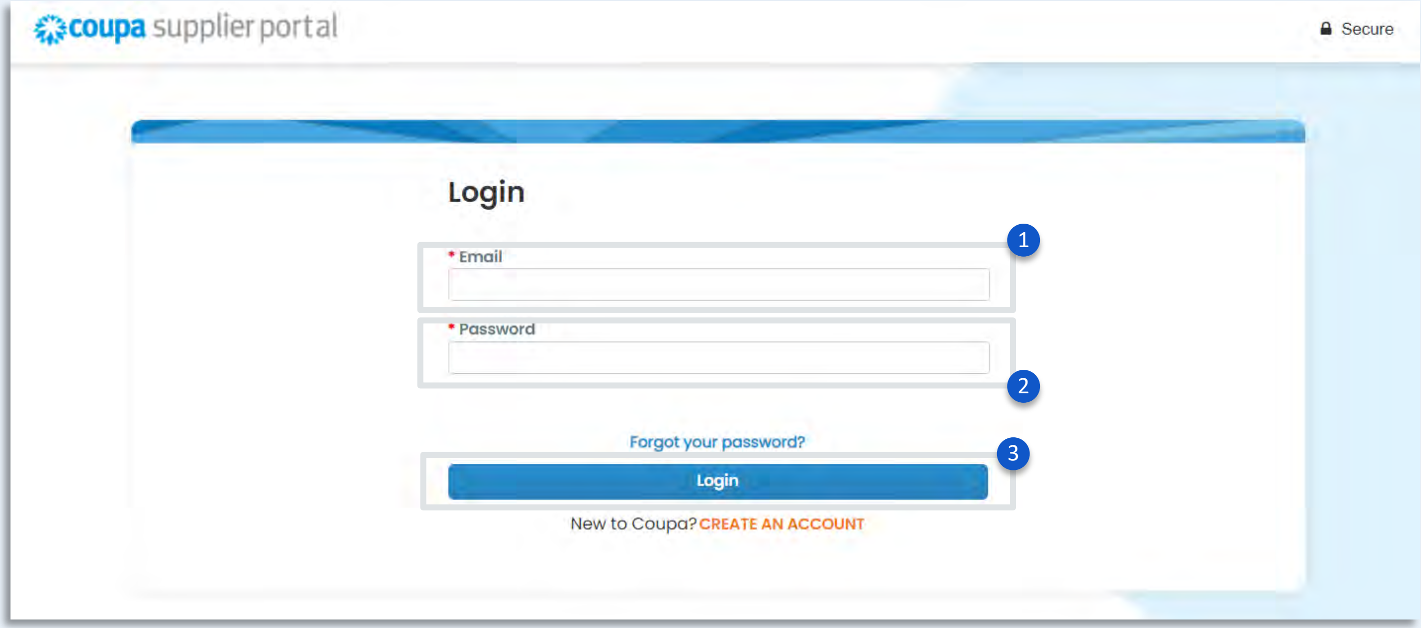
Note: The "Deactivate User" button is inactive when you edit your own access to avoid deactivating your own account.

Adding Users to the CSP

The first step to adding additional users is to login to the CSP.

Process Steps:

1. **Email address**
   Populate your email address (Username).
2. **Password**
   Populate your password.
3. **Log In**
   Click on log in to access your company's Coupa Portal.



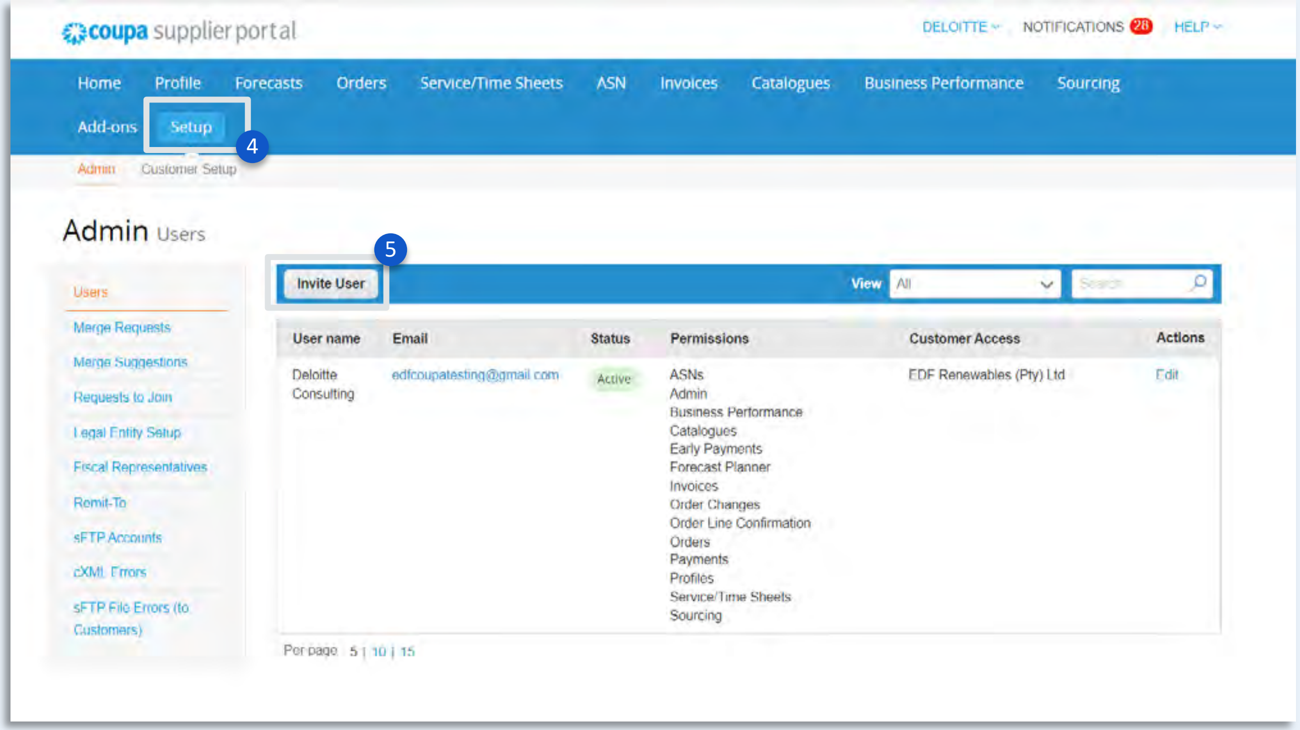
Adding Users to the CSP

Access setup.

Process Steps:

4 Once you have accessed the portal navigate to the **“Setup”** tab and select it.

5 Click **“Invite User”** to give another user in your organization EDF Renewables access



User Roles in Coupa

Role/Permission	Description
All	Gives the user full access to all CSP functions except for the user administration role / function.
Admin	The admin user has full access to all CSP functions, including user administration. Non-admin users can still view the Users tab of the Admin page and invite users, but they cannot edit existing users. Note: The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
Orders	Allows the user to view and manage Purchase Orders (POs) received from customers
Restricted access of orders	Allows the user to access POs and PO changes. Note: The permission is off by default.
Invoices	Allows the user to create and send invoices to customers.
Catalogues	Allows the user to create and manage customer-specific electronic catalogues.
Profiles	Allows the user to modify customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
ASNs	Allows the user to create and send advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows the user to create and submit service/time sheets against POs.
Payments	Allows a user to view payments and download digital checks.
Order Changes	Allows a user to submit PO change requests.
Early Payment	Is available only if your customers use Coupa Pay and have enabled the feature related to this permission
Business Performance	Allows viewing business performance information, for example, order, invoice, and delivery trends.
Sourcing	Allows viewing public sourcing events.

Assigning User Roles / Permissions

Assign user permissions.

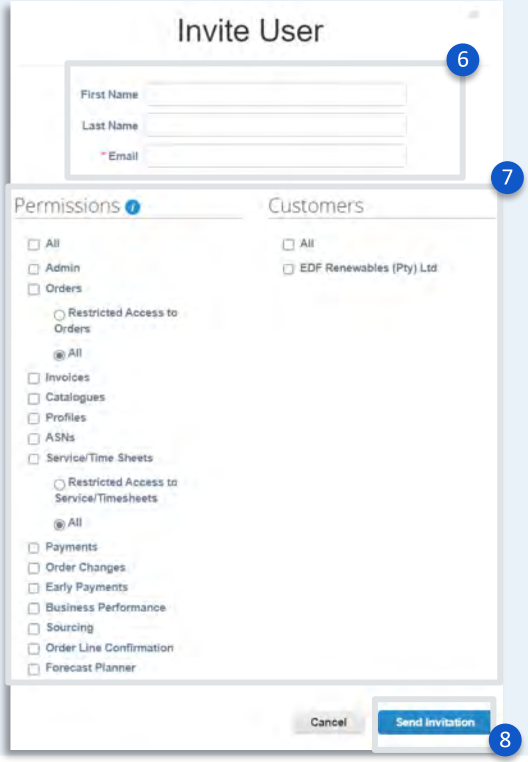
Process Steps:

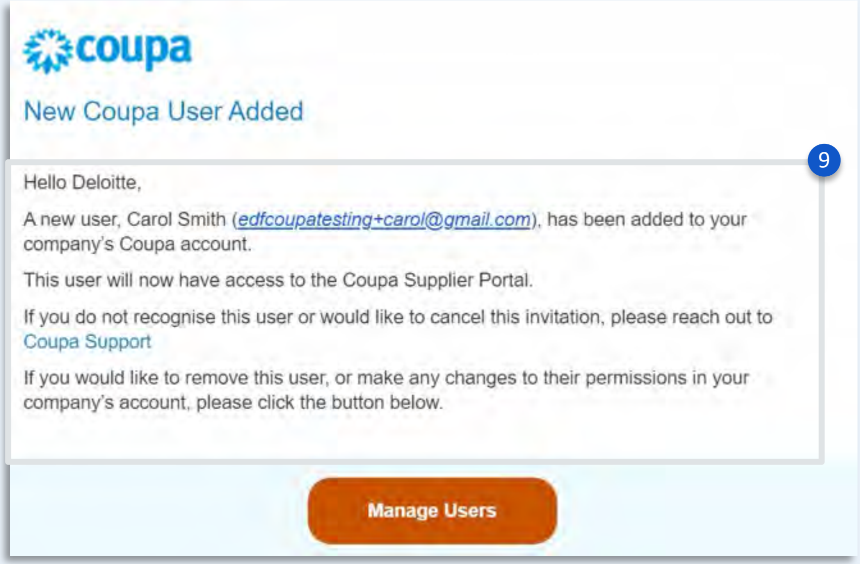
6 **User details**
Populate the user's First Name, Last Name and Email address.

7 **Permissions and customers**
Click on the tick box to assign roles and customers to the user.

8 Click on "**Send Invitation**" to send the registration to the user.

9 Admin users will be notified of all user creation via email





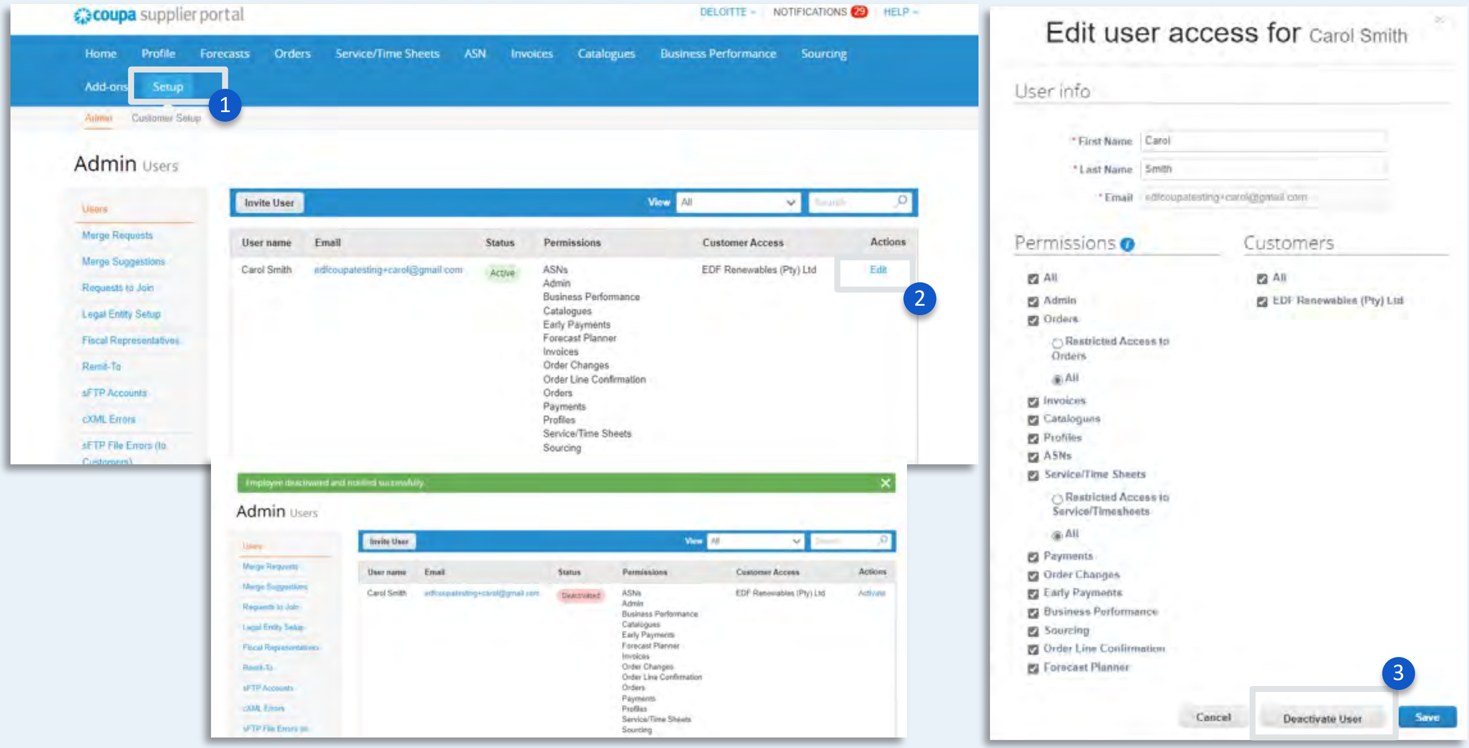
Deactivating Users on the CSP

Assign user permissions.

Process Steps:

1. To deactivate a user navigate to the “**Setup**”
2. Once you have accessed the setup tab navigate to the user you want to deactivate and click “**Edit**“**.**
3. Click on “**Deactivate user**” to deactivate the user on the CSP.
4. User status will be updated from active to **“Deactivated”**

***For auditing purposes Coupa does not delete user records**



04

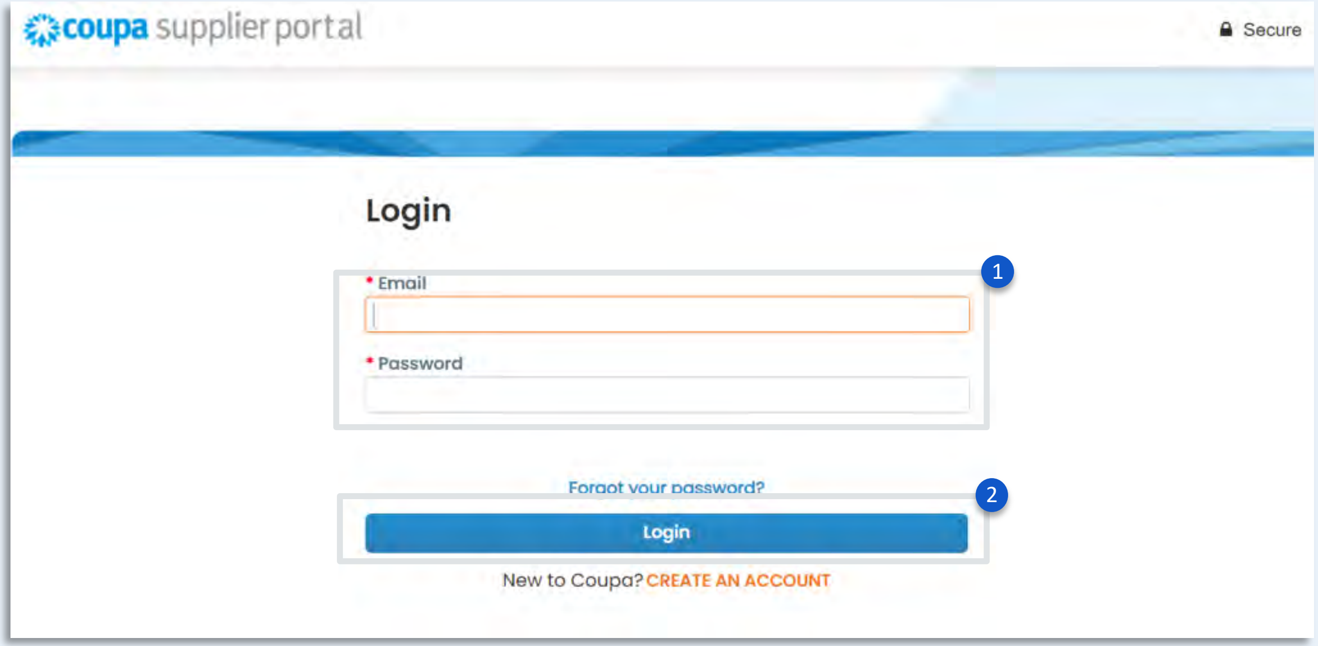
How to Merge CSP Accounts

How to Merge CSP Accounts

To merge a Coupa Supplier Portal Account to check which suppliers are linked on the CSP, login to CSP and navigate to the Home tab

Process Steps:

1. Populate your log in credentials "**Email Address**" and "**Password**".
2. Click on the "**Login**" button to access the CSP.

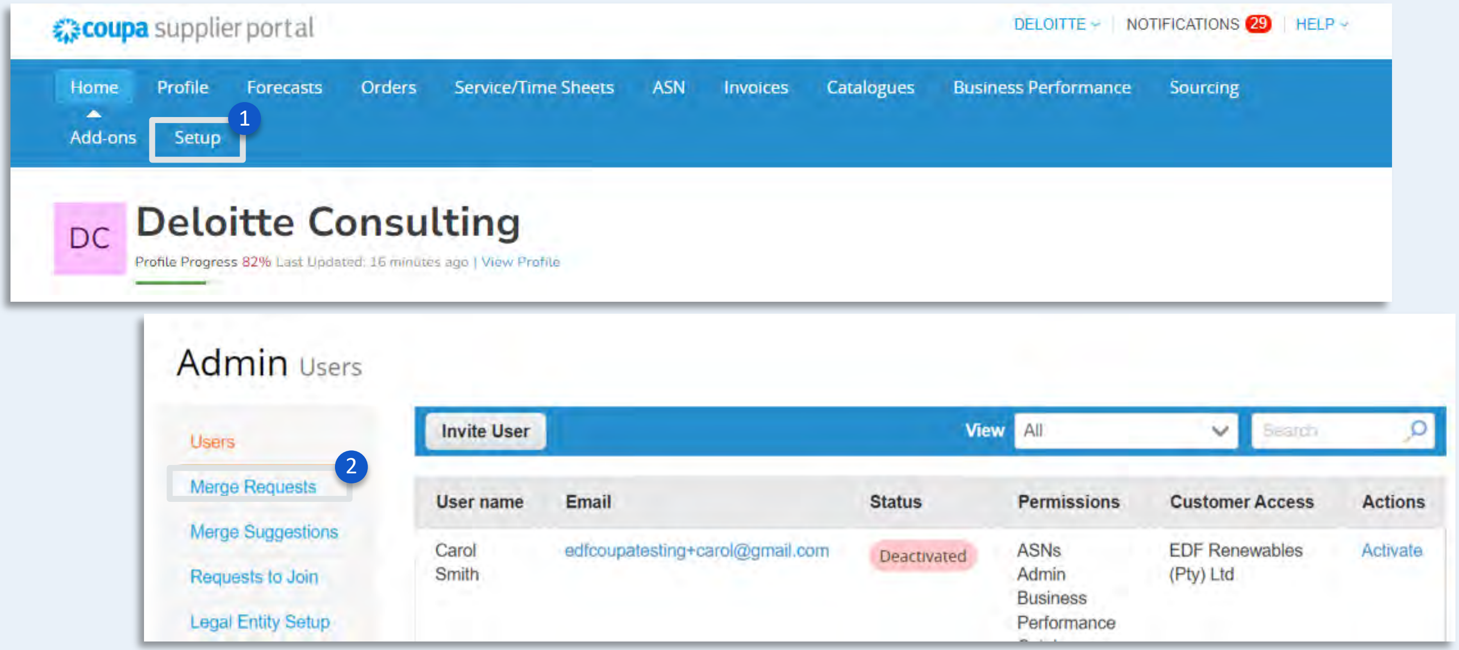


How to Merge CSP Accounts

To merge a Coupa Supplier Portal Account to check which suppliers are linked on the CSP, login to CSP and navigate to the Home tab

Process Steps:

1. Once logged in to the CSP and navigate to find the **“Setup”**.
2. Once you have accessed **“Setup”** click **“Merge Request”** to populate the merge details

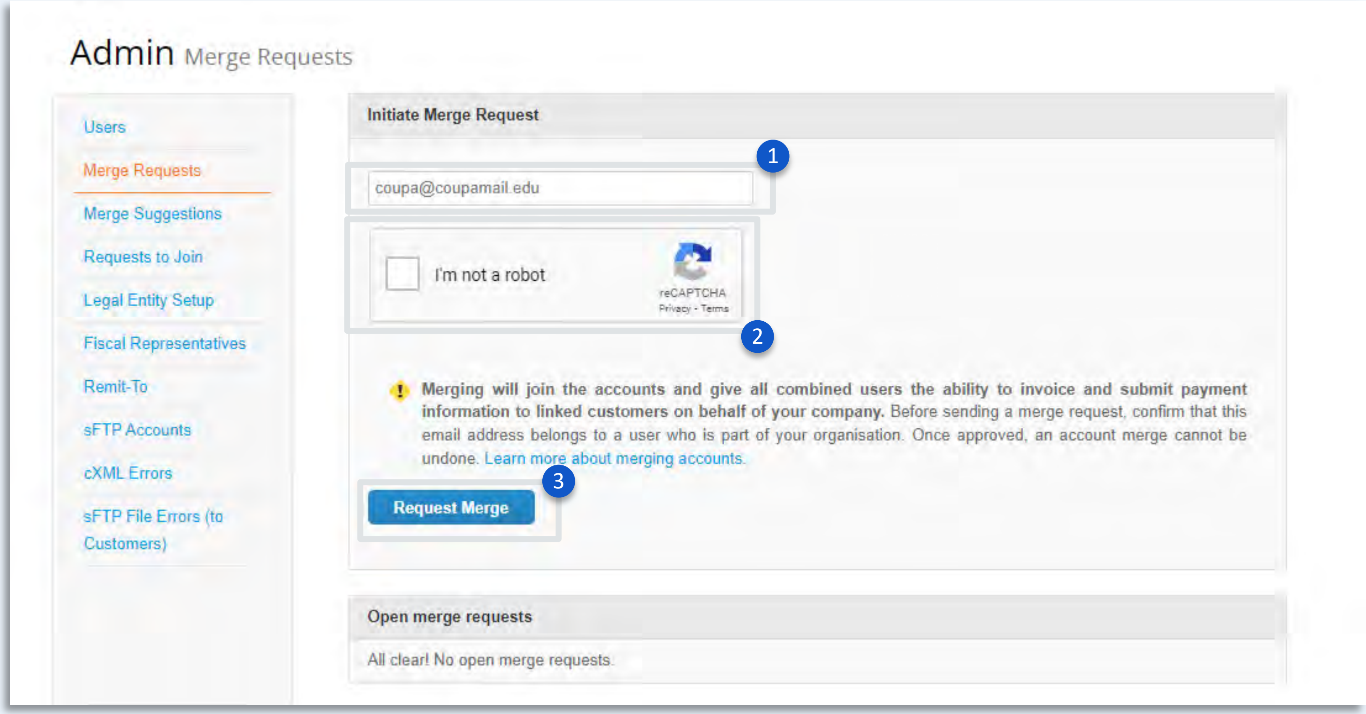


How to Merge CSP Accounts

Once you have accessed the CSP follow the below steps:

Process Steps:

1. Populate the email address of the admin account user you want to merge with.
2. Check the **"I'm not a robot" to** confirm that you are not a robot.
3. To send the merge request click on '**Request Merge**'.



05

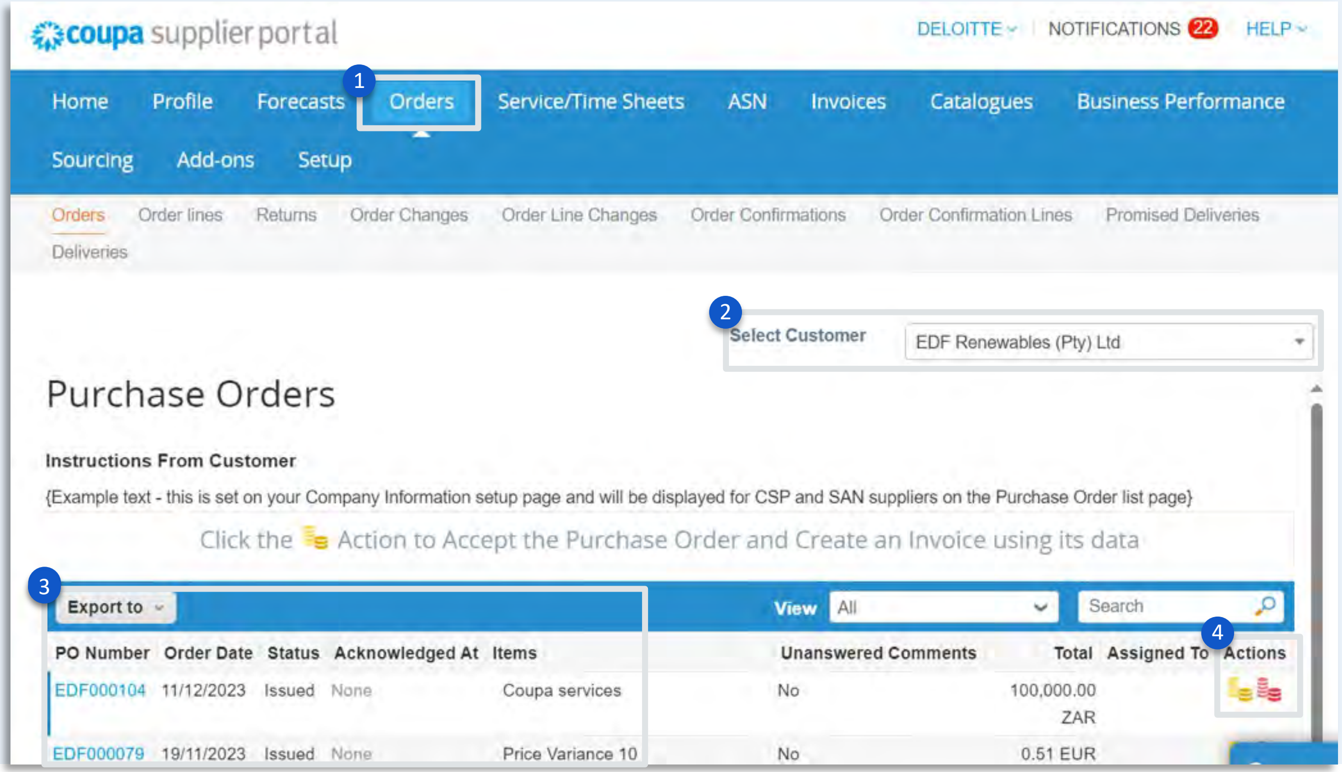
How to Manage POs

Managing Purchase Orders

To manage purchase orders, click on ‘Orders’ on header bar.

Process Steps:

1. Click on ‘**Orders**’ on header bar
2. Select Customer ‘EDF **Renewables (Pty) Ltd**’ if you have more than 1 customer on your portal
3. All customer purchase orders will be listed Click on PO hyperlink to view details
4. Actions – create invoices and create credit notes against open PO
   - a. Click the gold coins to create Invoice
   - b. Click the red coins to create Credit note



Managing Purchase Orders

To view purchase orders, click on ‘Purchase Order’ screen.

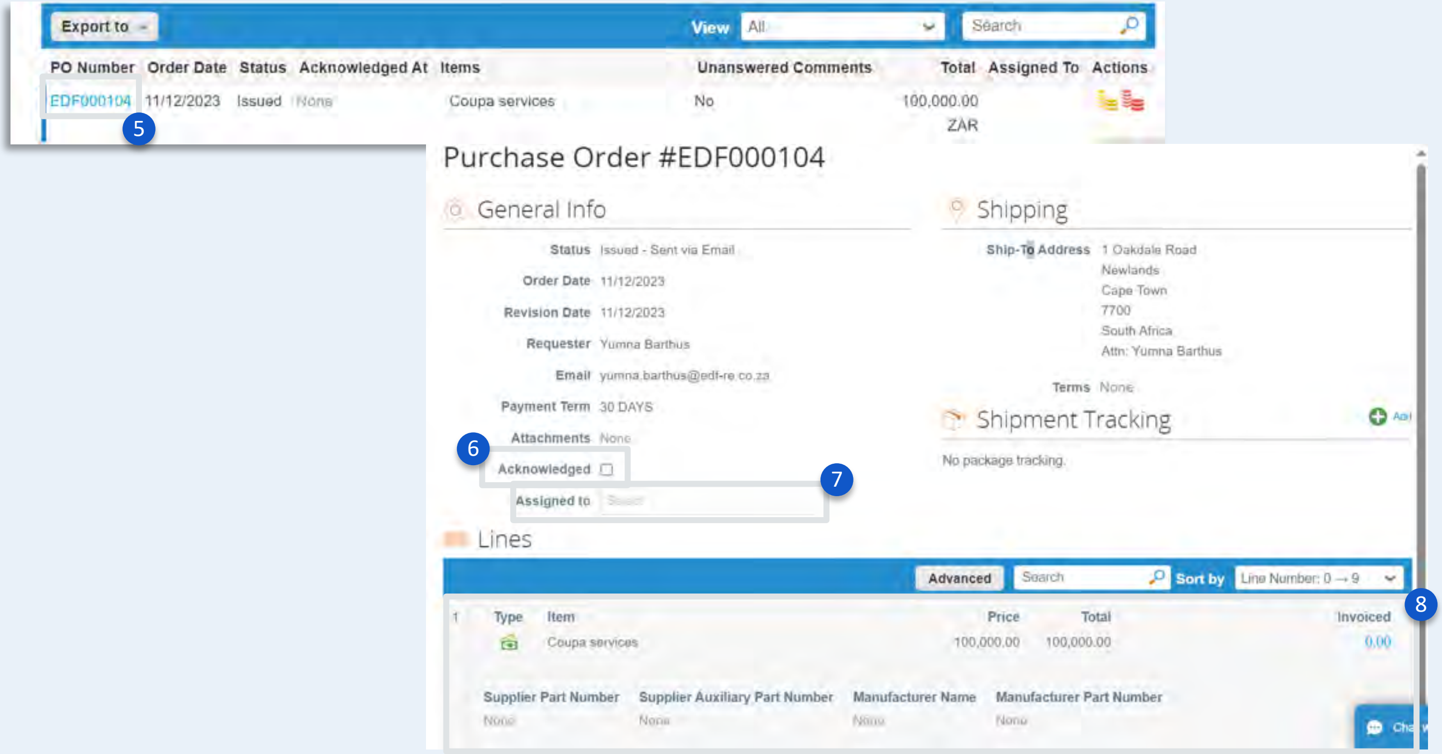
Process Steps:

5 Click on the ‘**Purchase Order number** of the PO to be viewed.

6 Check the **“Acknowledge”** tick box to notify the requester that you have received the purchase order from EDFR

7 Populate the name of the employee you want to assign the purchase order to

8 View the line items of the purchase orders to see goods/services requested by EDFR



Managing Purchase Orders

To enquire about a Purchase order navigate to the PO comments section.

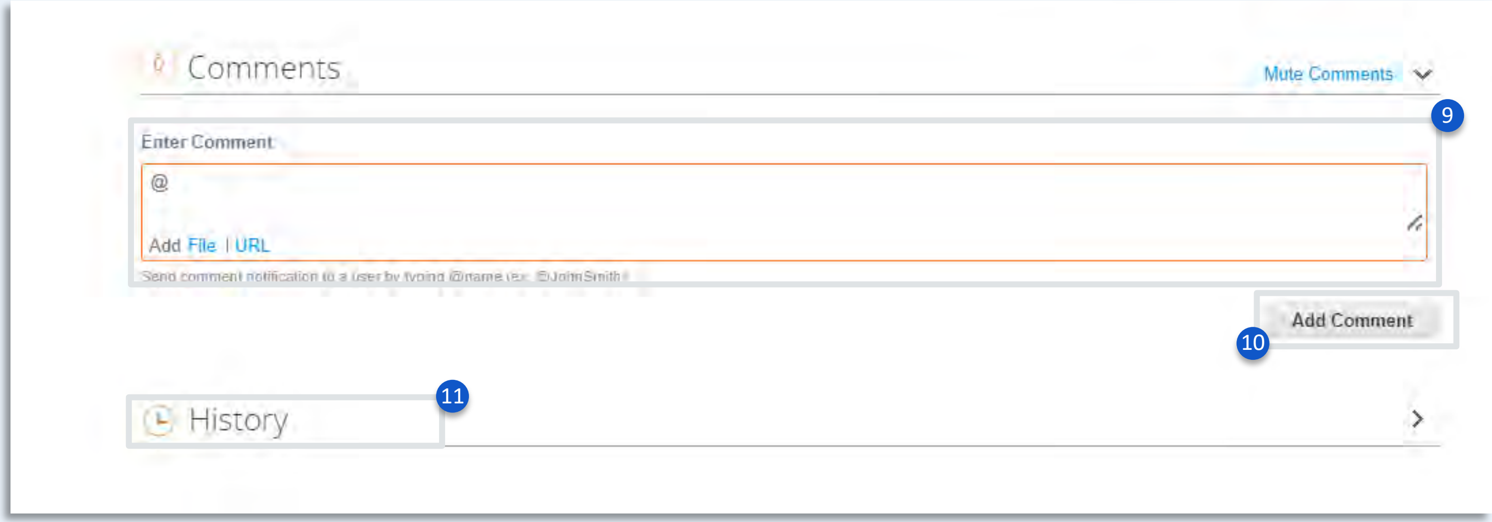
Process Steps:

9 Enter a comment to the requester if you have an questions or comments regarding the PO

Note : You can @ the requester when typing the comment

10 Once you have typed out your comment click **"Add Comment"** to send the comment to the requester

11 You can view the history of the purchase order



06

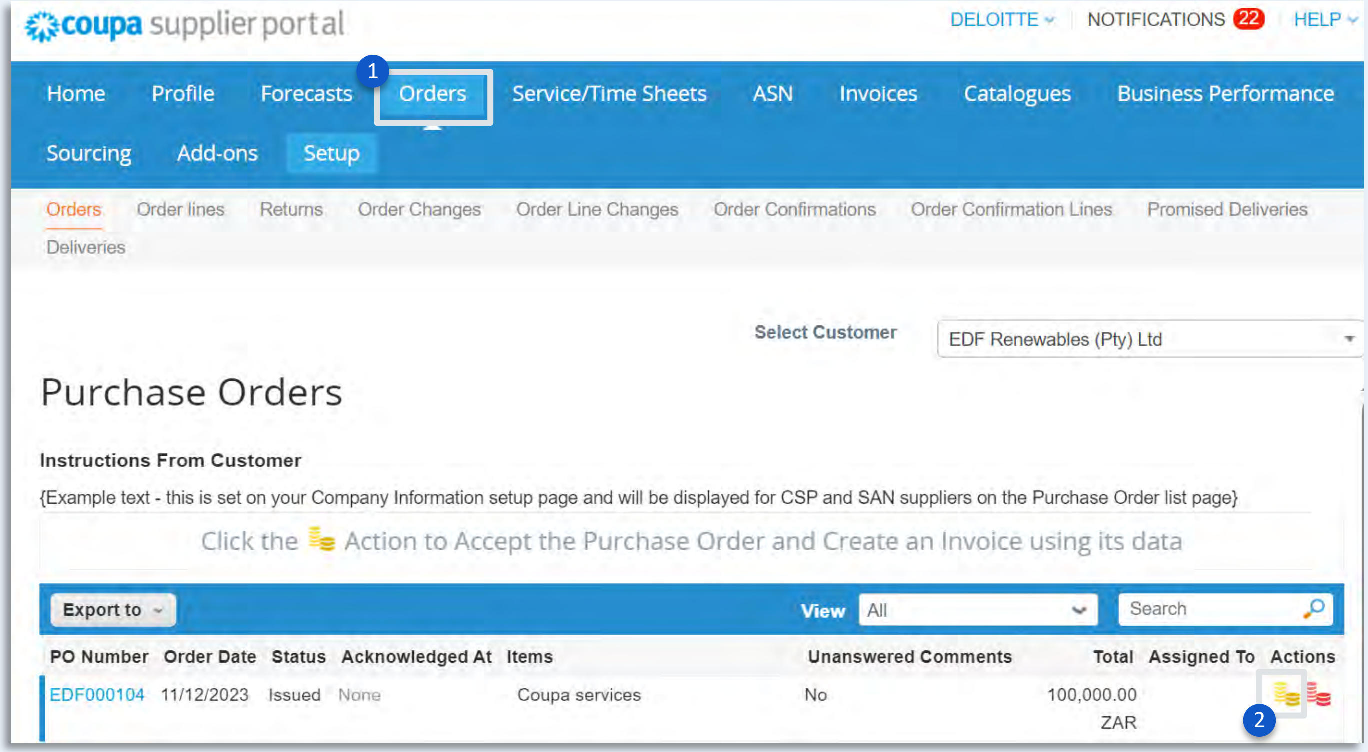
How to Create Invoices on the CSP

How to Create Invoices in the CSP (Flipping a PO)

The CSP allows you to quickly transfer a PO into an invoice (i.e., flip a PO) and send to your customers.

Process Steps:

1. To create a invoice navigate to the orders tab
2. To create an invoice, click on the stack of **gold coins**.



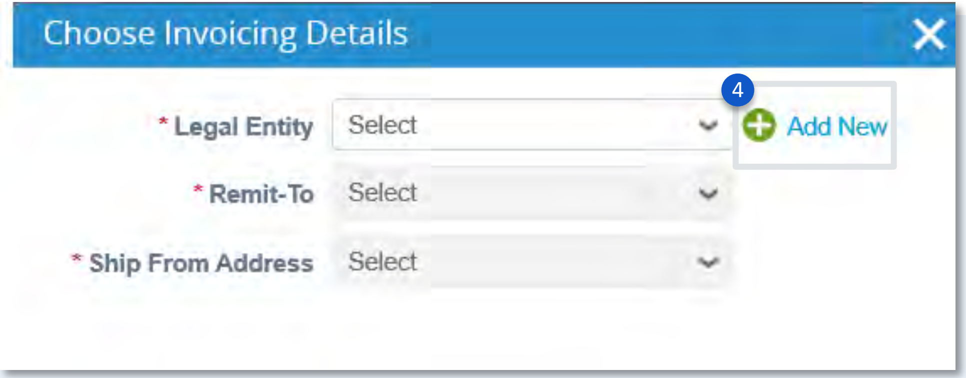
How to Create Invoices in the CSP (Flipping a PO)

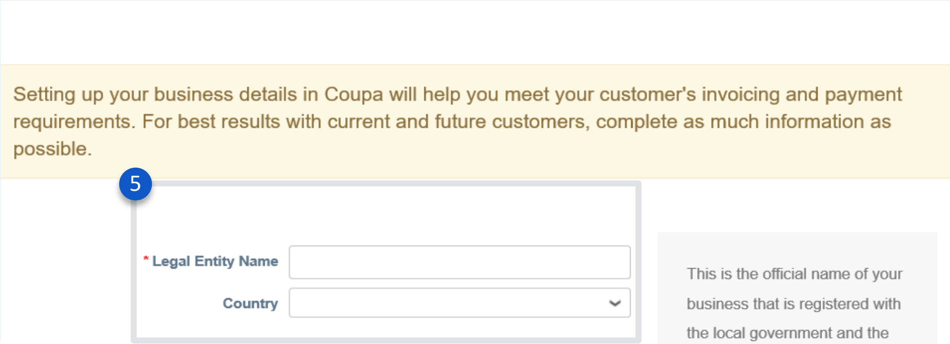
If you do not have a remit to address set up against your CSP profile, Coupa will prompt you to create one prior to sending an invoice.

Process Steps:

4 Click '**Add New**' to a add a remit-to address

5 Populate the official name of your business registered with the local government and the country





How to Create Invoices in the CSP (Flipping a PO)

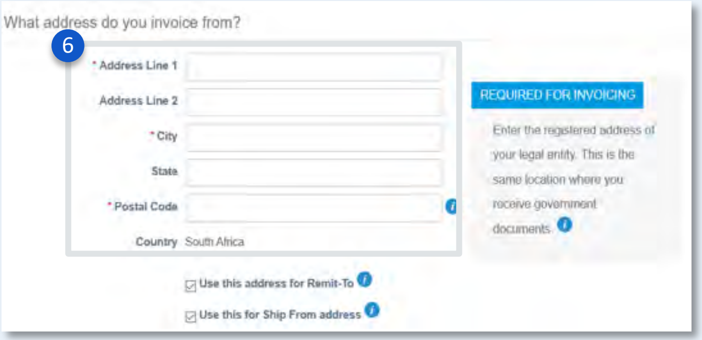
If you do not have a remit to address set up against your CSP profile, Coupa will prompt you to create one prior to sending an invoice.

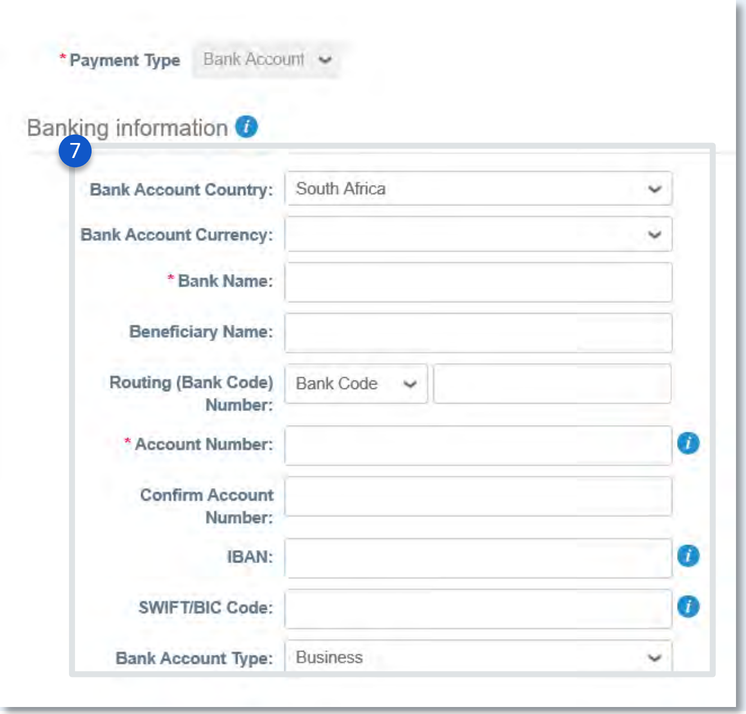
Process Steps:

6 Populate the address of your legal entity .

7 **Banking details**
Populate banking information.

Ensure the banking details is aligned to the banking details you have provided to EDFR in the banking confirmation letter you shared



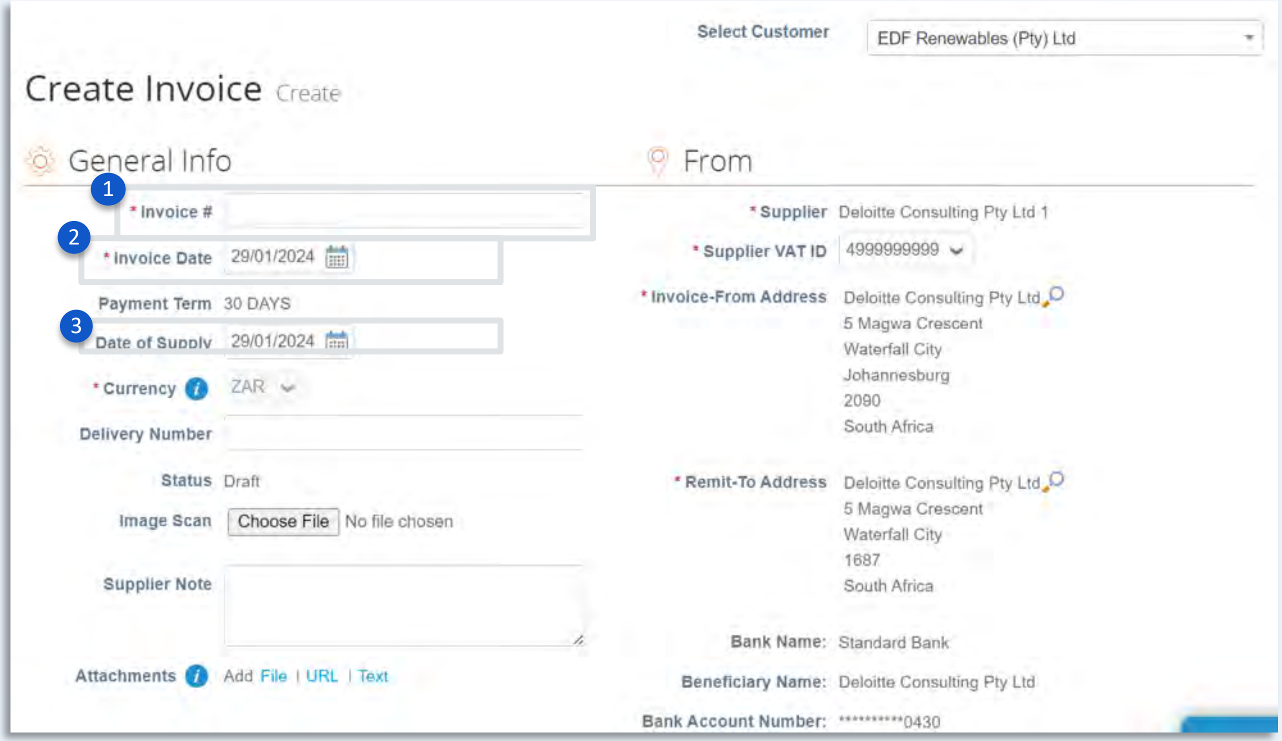


How to Create Invoices in the CSP (Flipping a PO)

After you have created a remit to address. You can create invoices from the CSP.

Process Steps:

1. **Invoice #**
   Populate the invoice number generated by your finance system
2. **Invoice Date**
   Populate the date the invoice was created in your finance system
3. **Date of Supply**
   The date when the good/service was supplied /rendered



How to Create Invoices in the CSP (Flipping a PO)

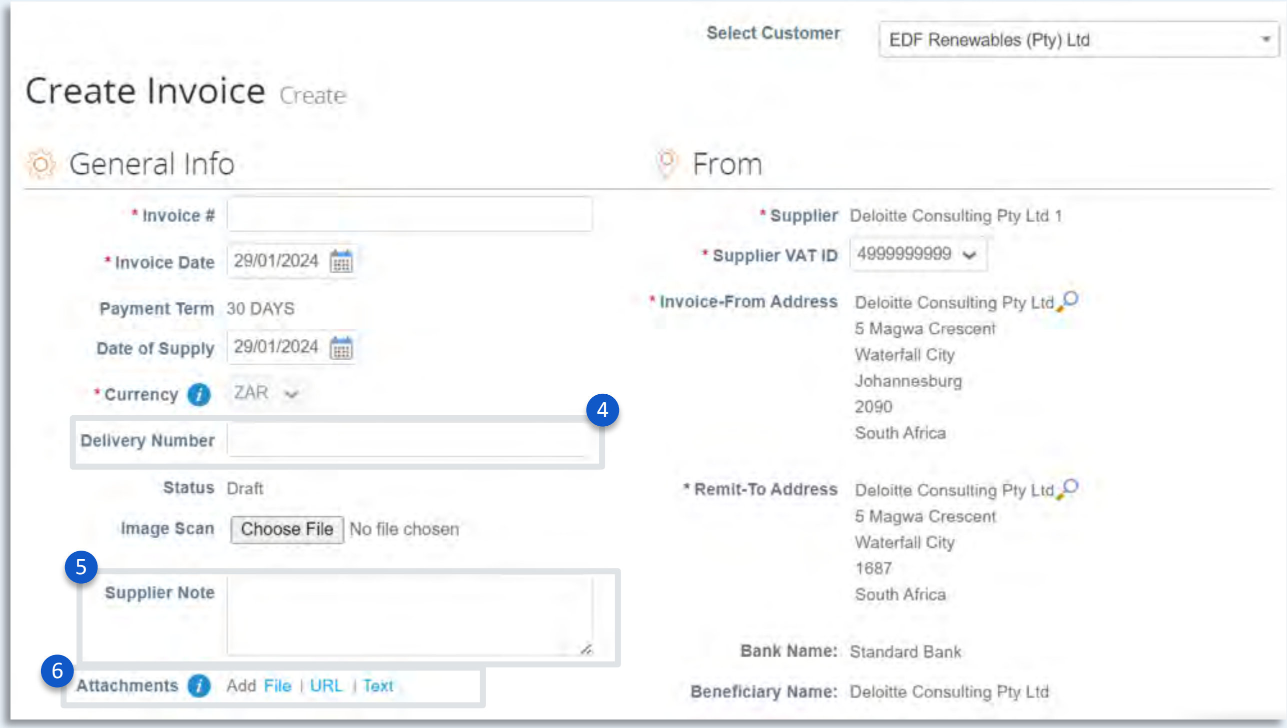
After you have created a remit to address. You can create invoices from the CSP.

Process Steps:

4 Delivery Number
Populate the delivery number if applicable

5 Supplier Note
You can use the textbox to send a note to EDFR , this note will be visible to the creator of the PO as well as the Accounts Payable team.

6 Attachments
Here you can attach any supporting documents (e.g. Delivery note) if necessary (this is not mandatory).



How to Create Invoices in the CSP (Flipping a PO)

You can generate invoices from this section of the CSP.

Process Steps:

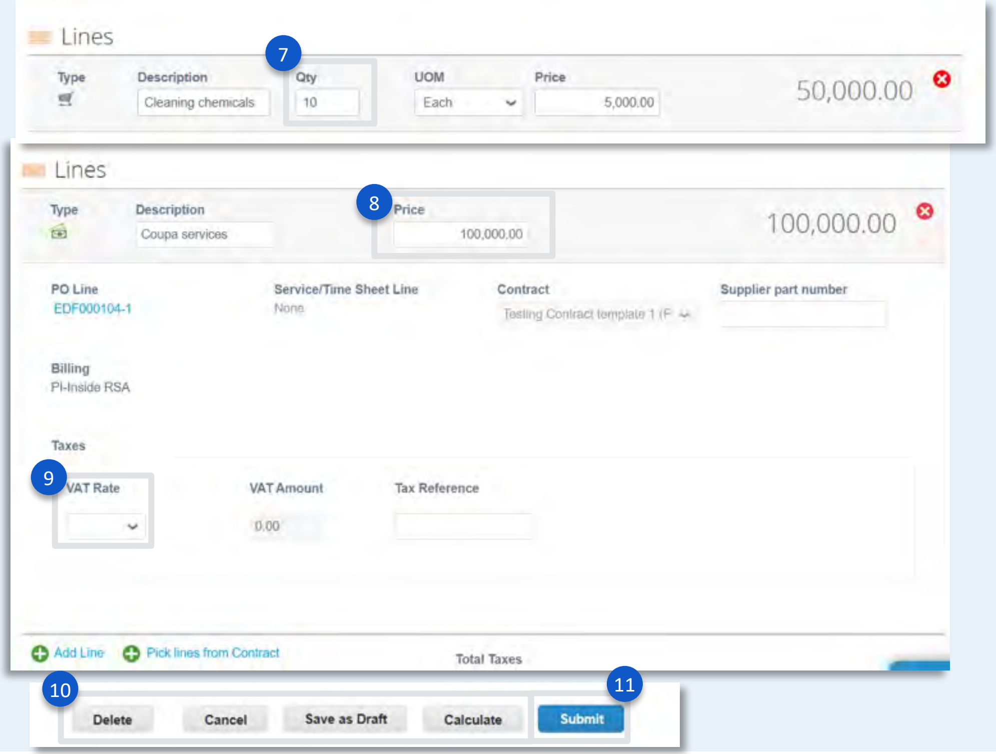
7 **Qty**
Populate the quantity you are invoicing for.
***You can partially invoice**

8 **Price**
The price you are invoicing for.

9 **VAT rate**
Populate the VAT rate of the goods/services

10 **Delete :** Deletes the invoice.
Cancel : Cancels the edit page of the invoice
Save as draft : Saves the invoice as a draft.
Calculate : calculates the total amount / value of the invoice. Click on '**Calculate**' for the total including VAT.

11 **Submit**
Submits the invoice to EDFR .



Invoice Statuses

Types of invoice statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. For more information, see Disputed invoices.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.

07

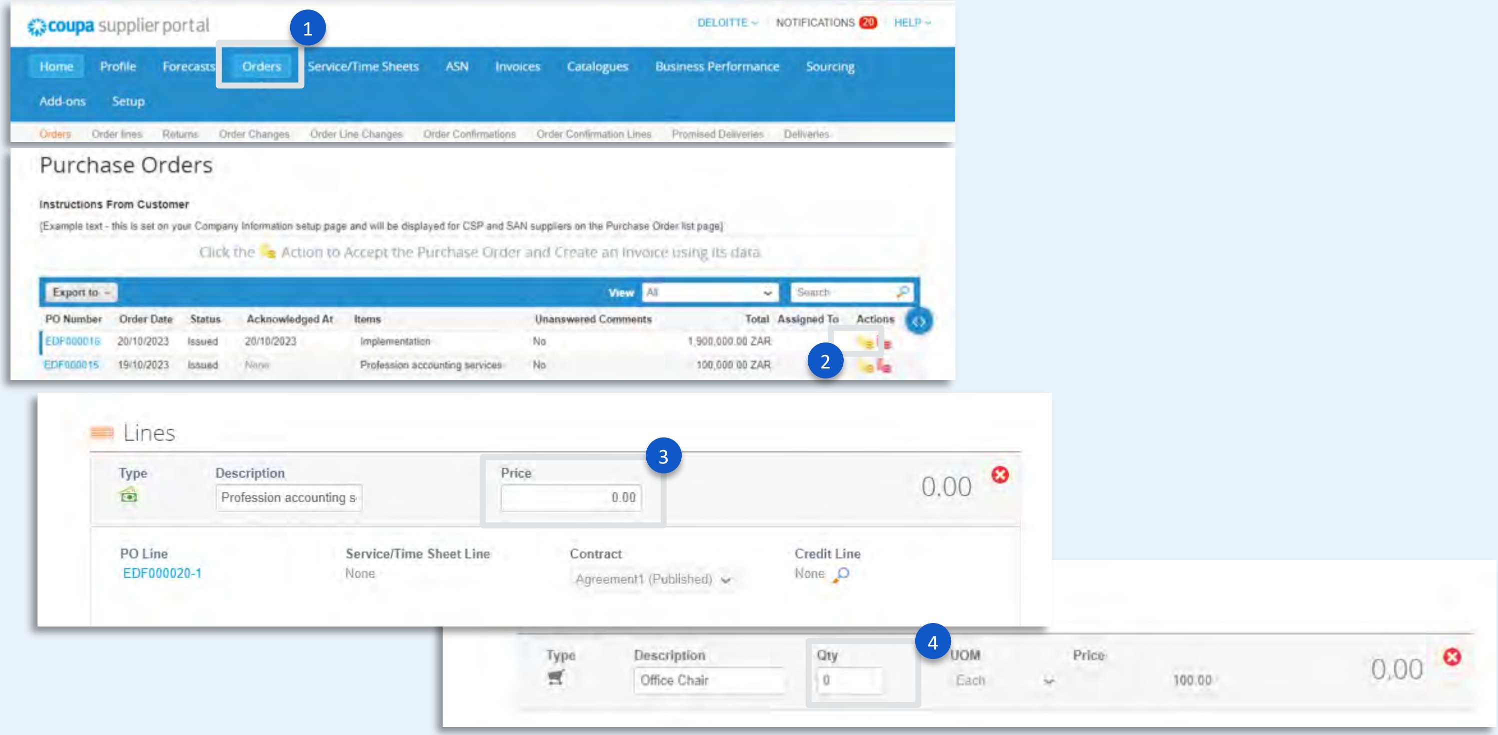
How to Partially Invoice on the CSP

How to Create Invoices in the CSP (Flipping a PO)

Coupa allows for partial invoicing

Process Steps:

1. On the CSP click on **'Orders'**.
2. Find the PO you want to create an invoice for and click on the gold stack of coins to create an invoice
3. For service purchase orders populate the partial amount for services rendered in **"Price"** e.g., PO value is R10 000, but you are invoicing for services worth R5000
4. For goods purchase orders populate the partial quantity for goods delivered in **"Qty"** e.g., PO quantity is 20 chairs , but you are invoicing for 10 chairs delivered



08

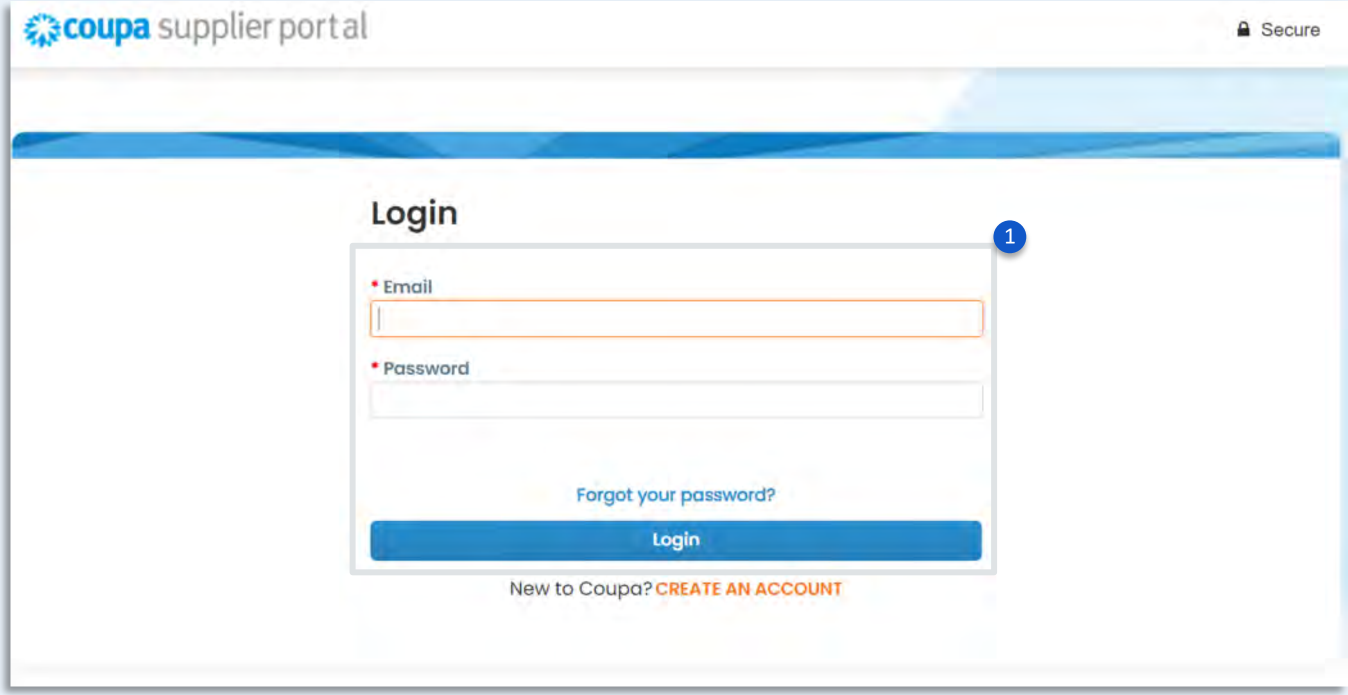
How to Create Credit Notes

How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

Process Steps:

1. Log into the CSP by populating your CSP credentials and click on '**Login**' to access the portal. In the **Actions** column of the PO, you want to create an invoice for, click the **Gold Coins** icon.



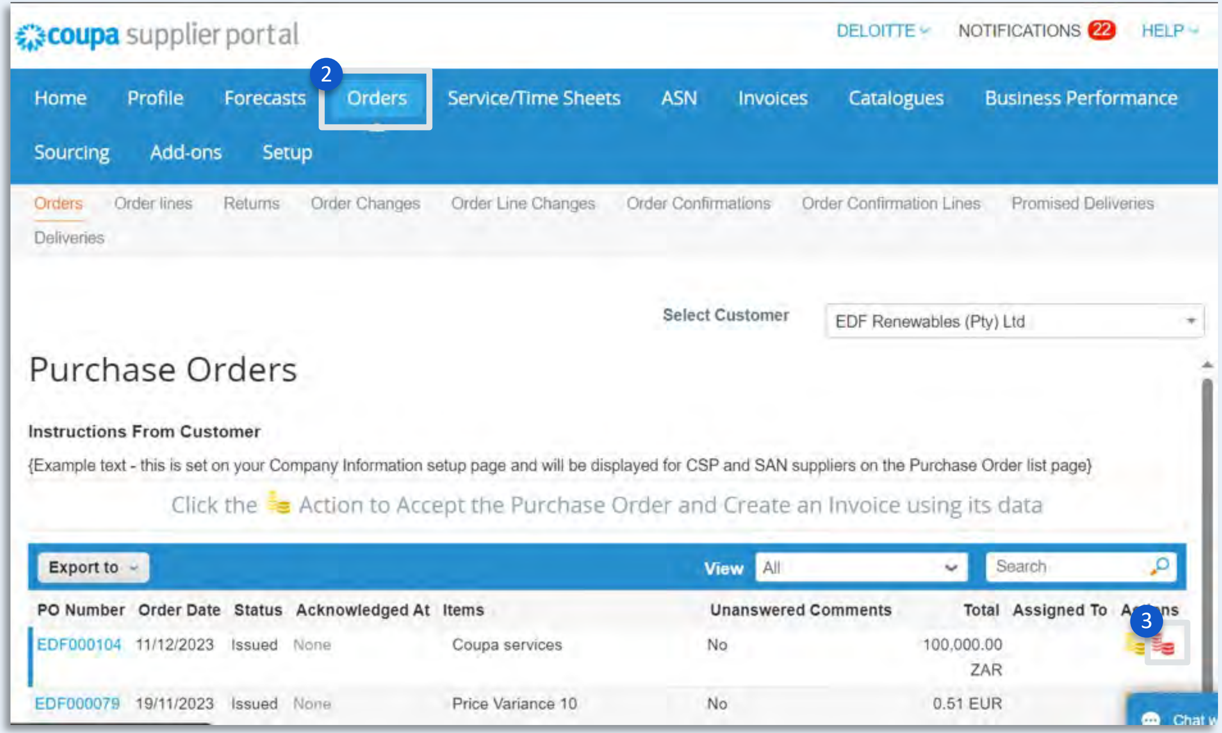
How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

Process Steps:

2 Navigate to the Orders tab. Under the listed '**Purchase Orders**' identify the PO that you would like to create a credit note for.

3 Click on the **Red Coins** to create a credit note. This will bring up the Credit Note page which you can populate and submit.



How to Create a Credit Note

Navigate to the invoices tab to create a credit note.

Process Steps:

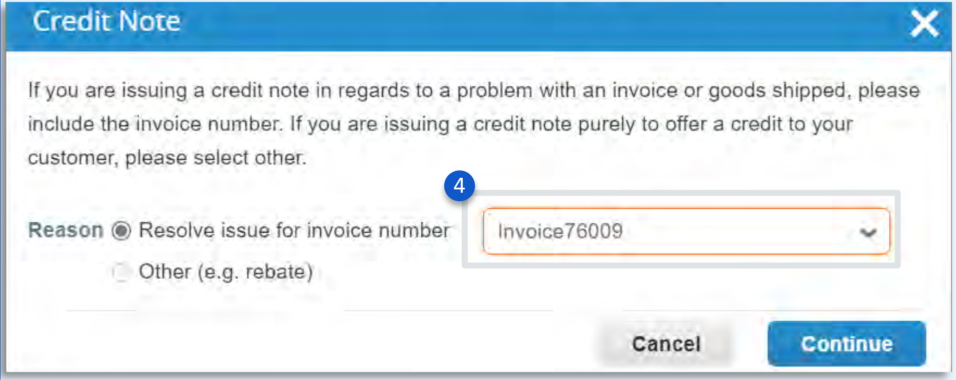
4 A credit note pop-up will be displayed. Click on the **drop-down** and select the invoice you are creating a credit note for.

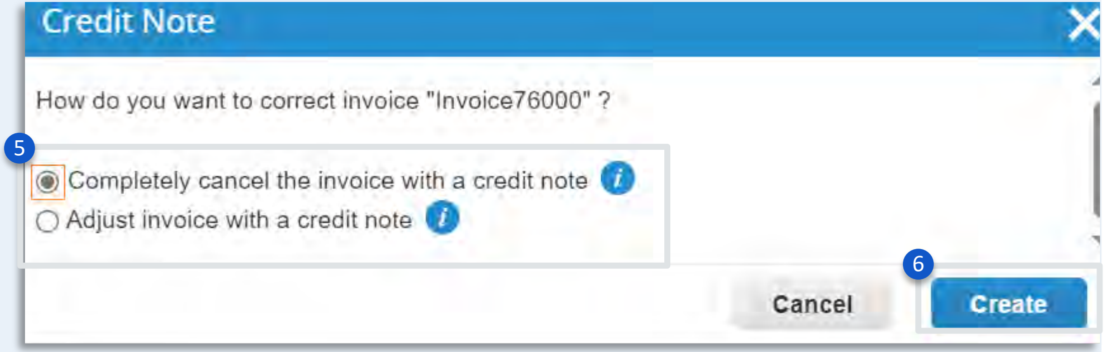
5 Select the applicable option:

Completely cancel the invoice with a credit note:
Use this option to fix any inaccuracies with the invoices by **cancelling** the incorrect invoice.

Adjust invoice with a credit note:
Only quantity and price can be reduced through **partia**l credit notes.

6 Click on **"Create"** to create the credit note





How to Create a Credit Note

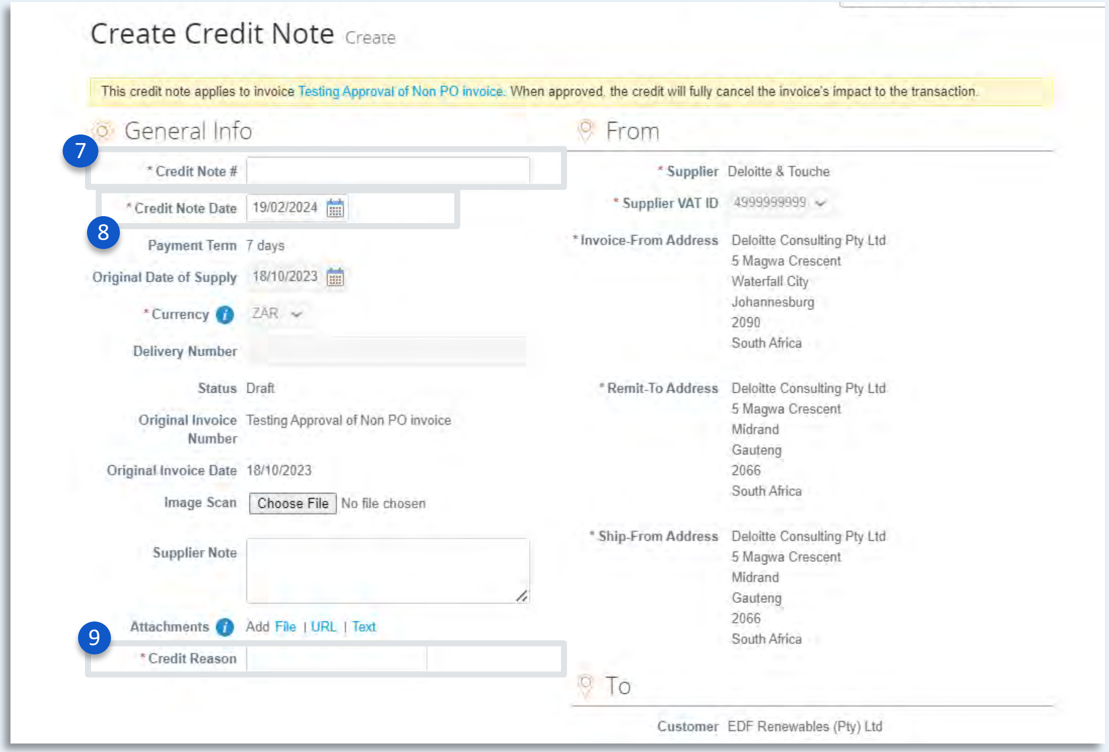
To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

Process Steps:

7 **Credit Note**
Populate the credit note number as per your finance system.

8 **Credit Note Date**
Reflects te date on which the credit note was created.

9 **Credit Reason**
The reason for creating the credit note.



How to Create a Credit Note

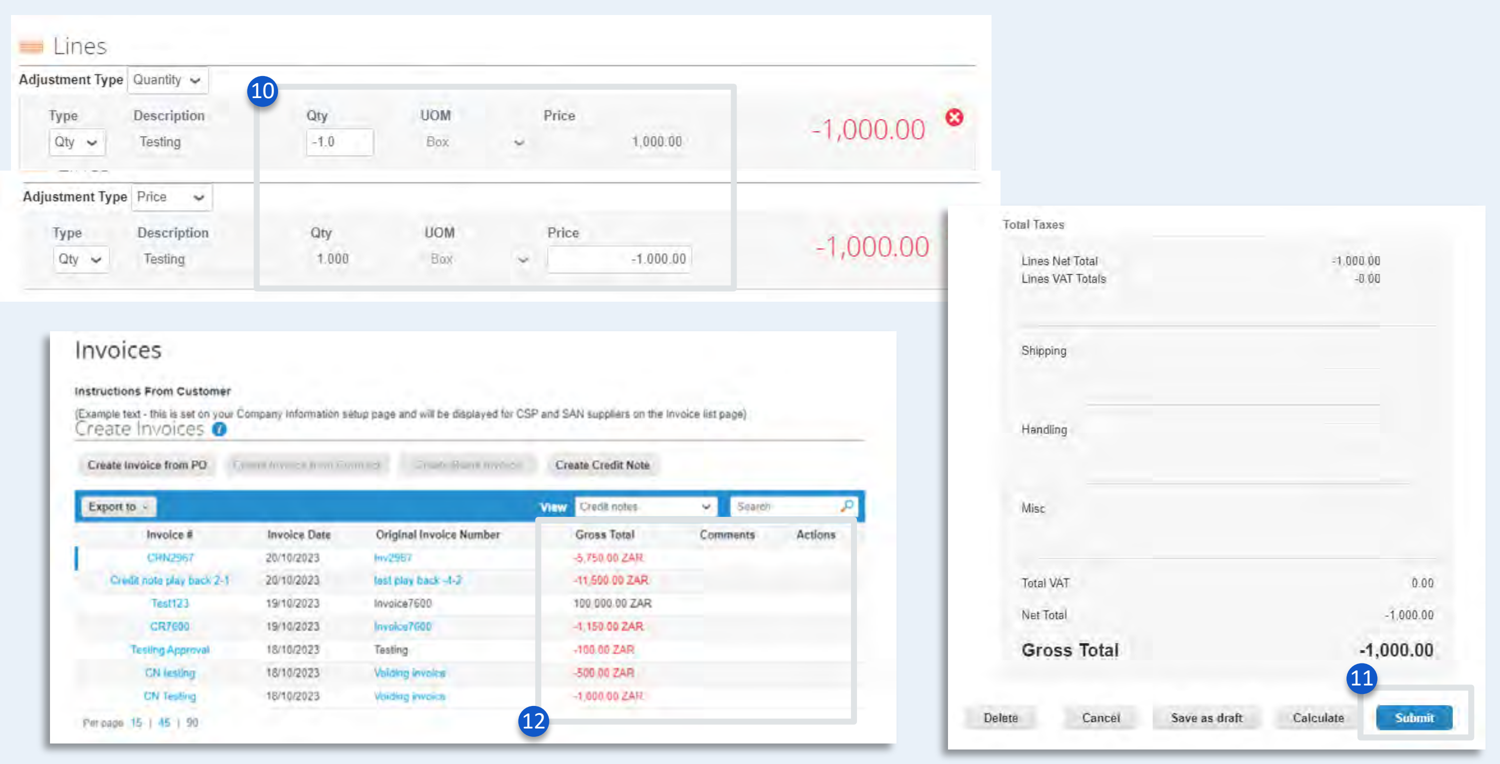
Navigate to the invoices tab to create a credit note.

Navigation:

10 Quantity and price will be displayed in red negative values for credit notes

11 Click on **"Submit"** to submit the credit note to EDFR

12 Credit notes will be displayed on the invoices tab with red negative values



09

How to Resolve Disputed Invoice

How to Resolve a Disputed Invoice

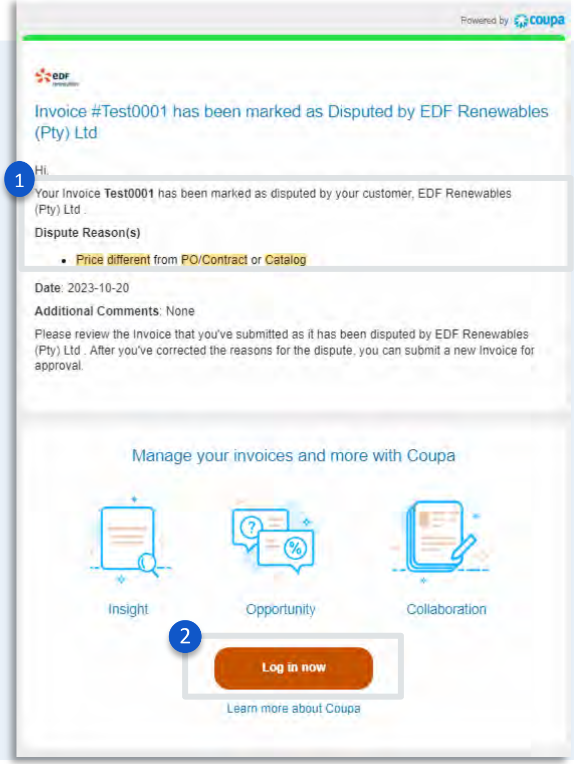
If the invoice is incorrectly captured e.g. Invoice lines are different from PO lines EDFR Accounts payable will Dispute the invoice prompting, you to resolve the dispute.

Navigation:

1. You will receive an email notifying you that your invoice has been disputed and the reason for the dispute .

   You will also be notified of a dispute on the CSP notifications

2. Click '**Log in Now**' to login to the Coupa Supplier Portal and view the invoice being disputed.



How to Resolve a Disputed Invoice

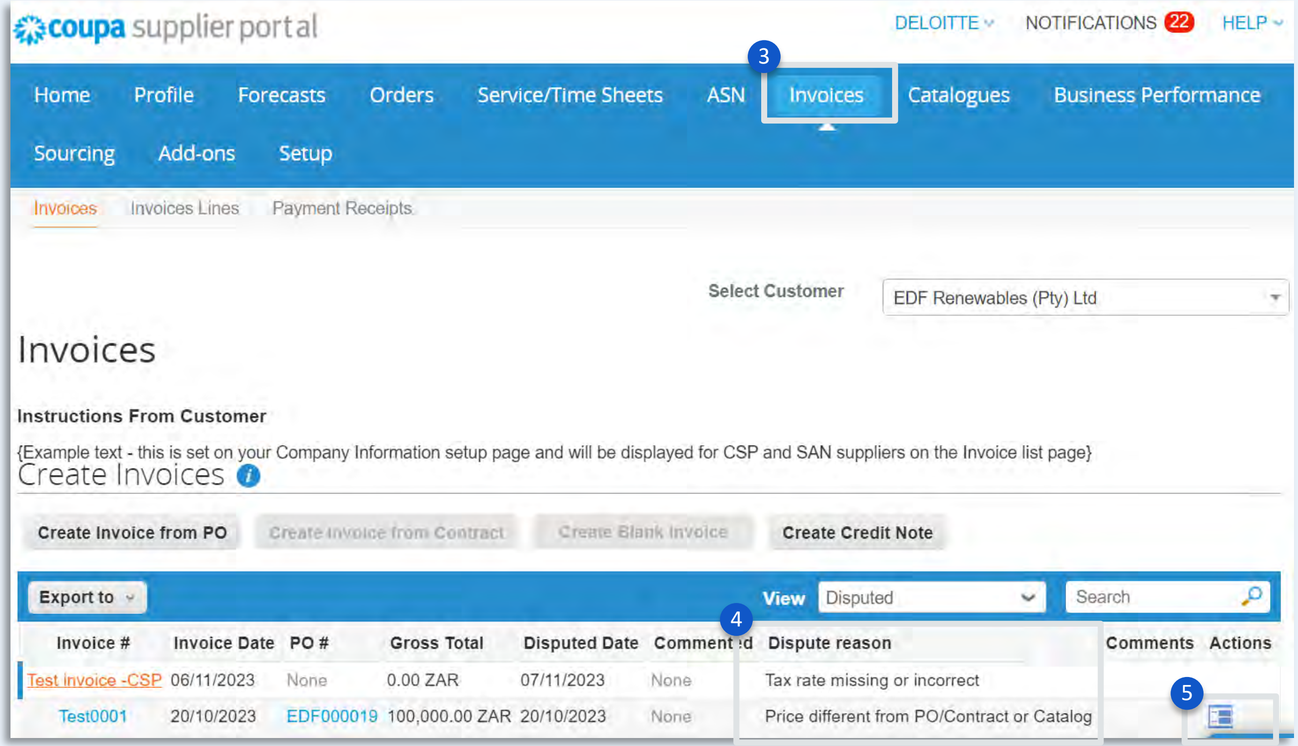
Once you have accessed the invoices tab on the CSP follow the below steps to resolve the dispute:

Navigation:

3 Navigate to **"Invoices"** once you have logged in to CSP

4 The status of the invoice will be '**Disputed**'.
You can filter for all your Disputed invoices by changing the View to reflect all Disputed Invoices.

5 Click on '**Resolve**', under '**Actions**' to resolve the disputed invoice.



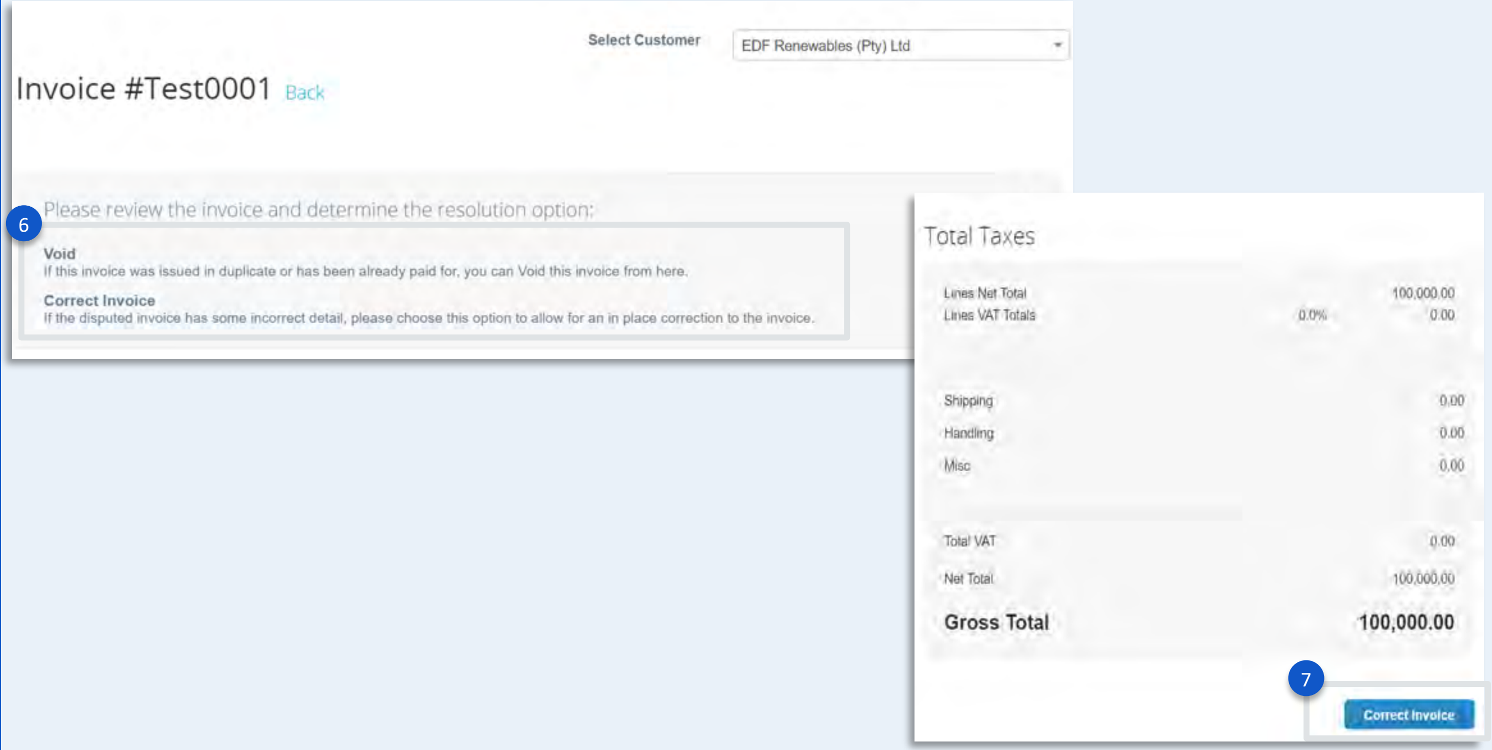
How to Resolve a Disputed Invoice

There are 2 options to resolve a disputed invoice.

Navigation:

6 Review the applicable resolution for the disputed invoice

7 The '**Correct Invoice**' option allows you to adjust the invoice e.g. edit the Qty and Amount.

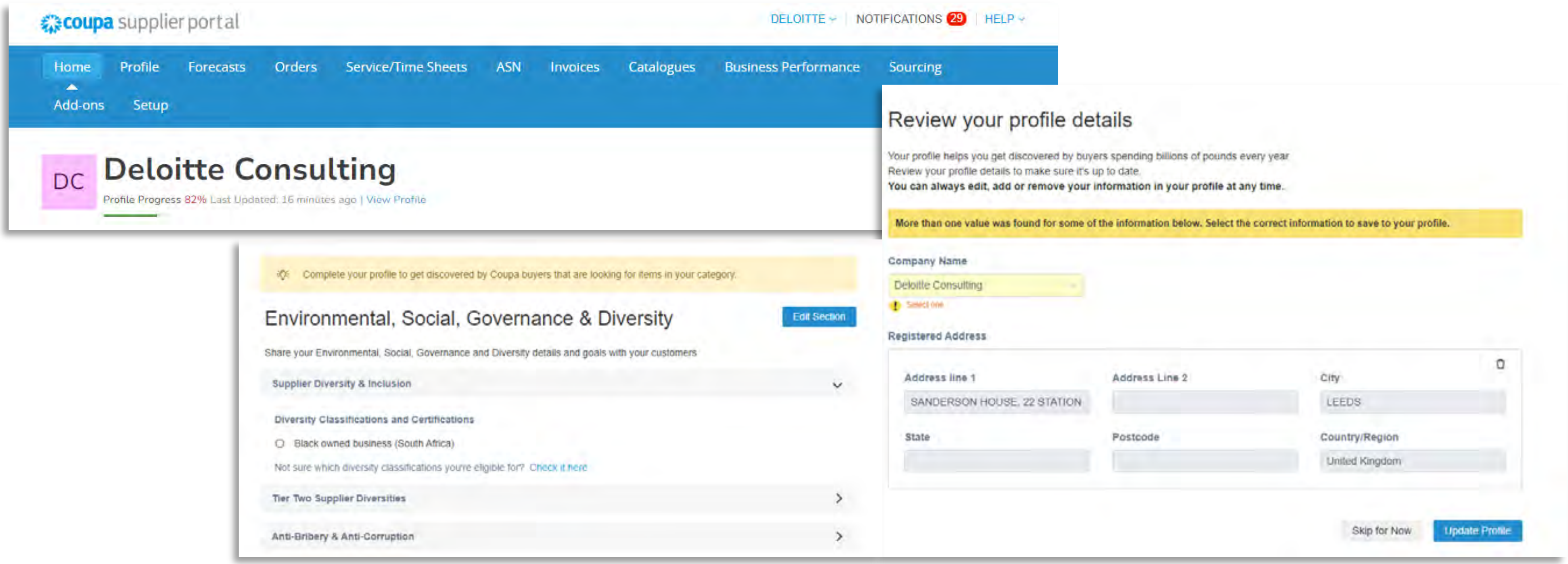


10

CSP Public Profile

Coupa Public Profile

In the CSP, you have a public profile, and you can have specific profiles for your customers that you relate to through the CSP. Anyone can find and connect with you through your public profile. Your public profile is created when you create your account and it contains general information about your company, for example, name, logo, website, industry, year of establishment, top commodities, currencies, diversity, and corporate social responsibility rating (on the Home and Profile / Public Profile pages), the link to your public profile (on the Home page), and contact information (on the Profile / Public Profile page).



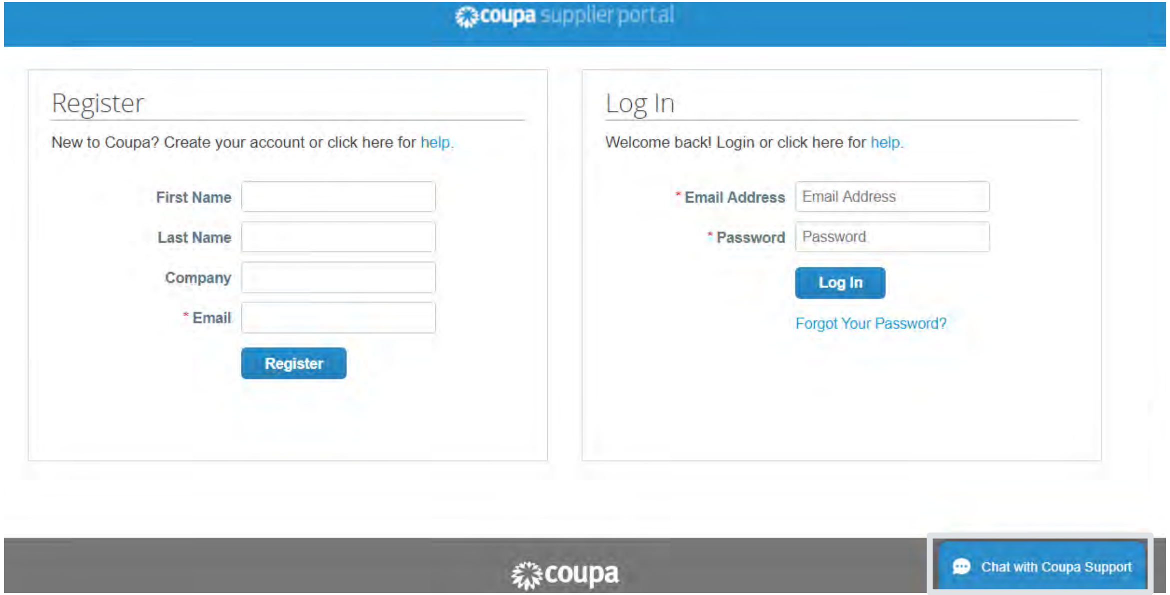
11

How to Log a Call with Coupa

When Can I Log a Call with Coupa?

EDFR does not have visibility and access to your Coupa Supplier Portal (CSP), therefore as a Supplier you will need to log a call when:

- You are experiencing technical issues on the CSP
- You have requested password reset emails but are not receiving the requested emails
- You cannot access your portal

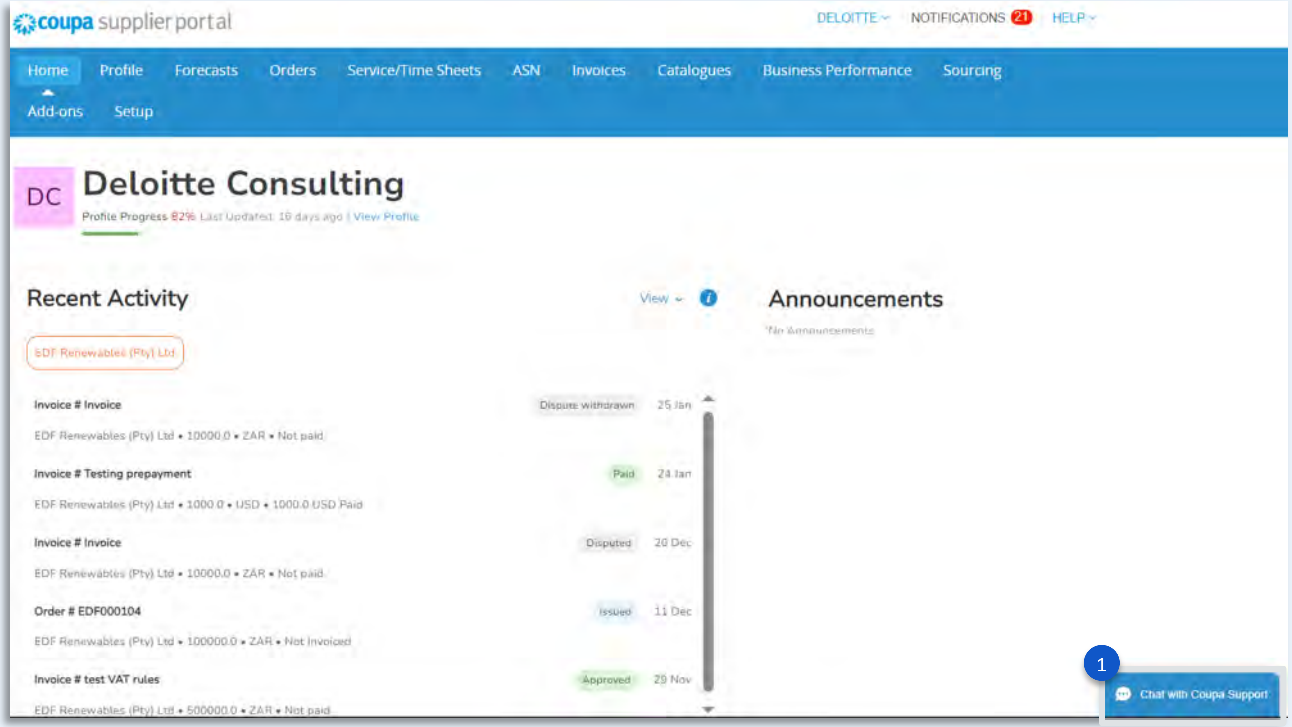


How to Log a Call with Coupa

Below, we have outlined steps you can follow when logging a call with Coupa:

Process Steps:

1. Log into the CSP.
Once logged into the CSP, scroll to the bottom of the page and click on ‘**Chat with Coupa Support**‘ button.

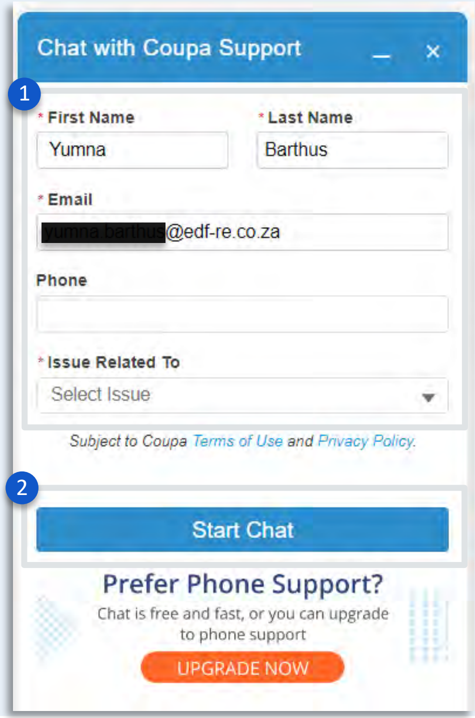


How to Log a Call with Coupa

Populate the mandatory fields:

Process Steps:

1. Once you have clicked on '**Chat with Coupa Support**' a pop-up will appear. Populate all the mandatory fields on the pop-up.
2. Click on '**Start Chat**' for assistance from a Coupa agent.



coupa

Thank You