



# Coupa Supplier Portal Manual

April 2024

# Contents

1. Course Outline
2. Responding To An RFQ
3. Adding Users On The CSP
4. How To Merge CSP Accounts
5. How To Manage Purchase Orders
6. How To Create Invoices On The CSP
7. How To Partially Invoice On The CSP
8. How To Create A Credit Note
9. How To Resolve Disputed Invoice
10. CSP Public Profile
11. How To Log A Call With Coupa



# 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

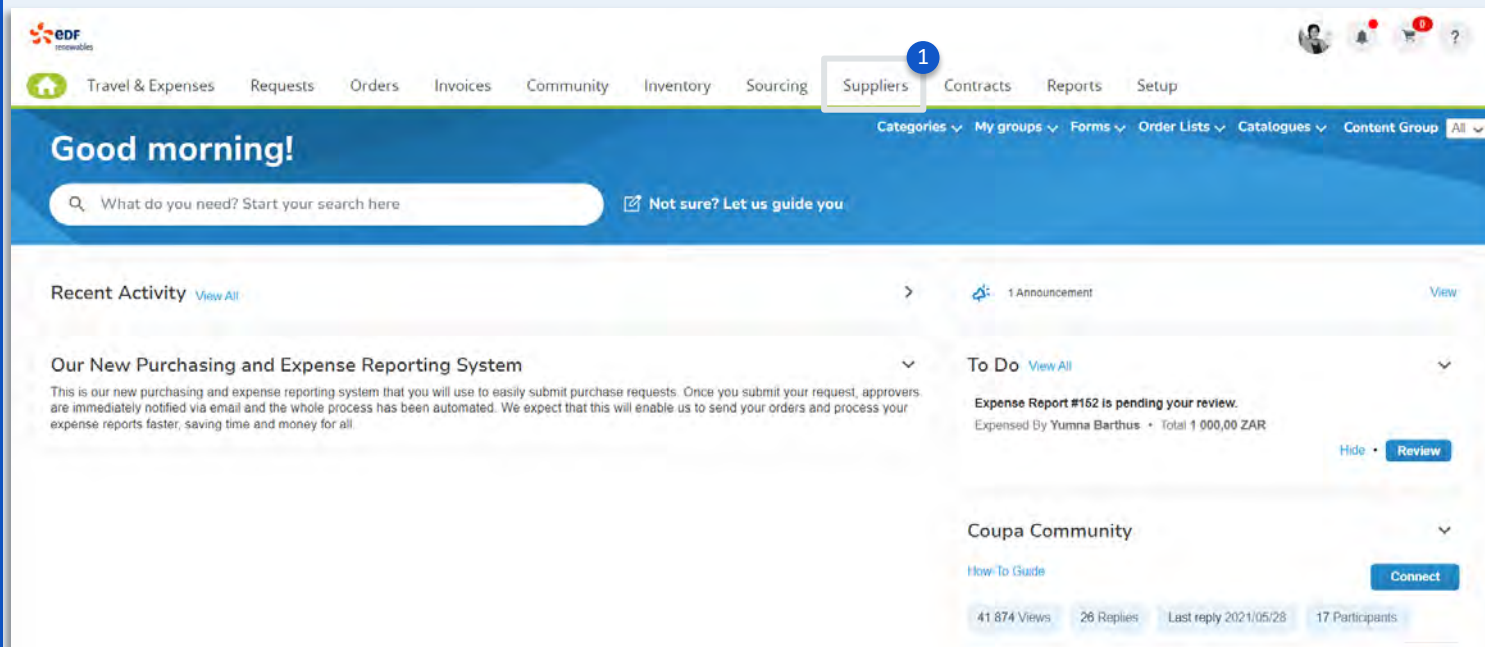


# Sending an Invite to a Supplier

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

The screenshot shows the Coupa Suppliers page. At the top, there is a search bar with the text "What do you need?". Below this is a navigation bar with tabs: Travel & Expenses, Requests, Orders, Invoices, Community, Inventory, Sourcing, Suppliers (highlighted), Contracts, Reports, and Setup. Under the Suppliers tab, there are sub-tabs: Suppliers, Supplier Information, Certificates, Supplier Sites, Catalogues, Supplier Portal Directory, and Insights. The main content area is titled "Suppliers". It features a toolbar with buttons: Create, Load from file, Export to (dropdown), View (dropdown set to All), Advanced, and a search bar. Below the toolbar, there are tabs for Opportunities and Supplier Base. A table below shows a list of suppliers. The first supplier is "CAM AG TEST 101". The table has columns: Name, Display Name, Status, On Hold, Pending Request Count, Pending Requests, Supplier Portal Status, Supplier Contact, Address, Request change orders, and Actions. The Actions column for the first supplier includes an "Invite" button, an "Add Tag" button, and a "Request" button. A blue circle with the number "2" is placed over the search bar in the toolbar.

Name	Display Name	Status	On Hold	Pending Request Count	Pending Requests	Supplier Portal Status	Supplier Contact	Address	Request change orders	Actions
CAM AG TEST 101	CAM AG 101	Active	No	0		Linked	israr.aslam	Dell Head Office Westminster Road London London G12 8LZ United Kingdom	No	  

# 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

Suppliers

Create Load from file Export to View All Advanced Amazon

showing limited search for Amazon X

Opportunities Supplier Base

Invite Add Tag Request

	Name	Display Name	Status	On Hold	Pending Request Count	Pending Requests	Supplier Portal Status	Supplier Contact	Address
3	<input type="checkbox"/>	Amazon.com	Amazon.com	Active	No	0	Name missing	Allison Livingston	1516 2nd Ave Seattle, WA 98101 United States

4 Invite Add Tag Request Per page 15 | 45 | 90

# 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

### Compose Invitation to Coupa Supplier Portal

Verdana 11pt B I U A A



Hello Supplier,

We handle all business spend electronically to make sure you're paid on time and prevent lost documents.


To ensure your ability to do business with us, you have 48 hours to register your account. Please contact us at [supplier@coupa.com](mailto:supplier@coupa.com) if you are unable to register for any reason!


Daisy Mogalla  
EDF Renewables (Pty) Ltd

Powered by TinyMCE

☒ Send invitation to

☒ Primary contact only

☐ All contacts 

☐ Allow supplier to manage its punchout configuration 

Cancel

**Send Invite**



# 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.

The screenshot shows the 'coupa supplier portal' login interface. At the top right, it says 'Secure' with a lock icon. The main heading is 'Login'. Below it are two input fields: 'Email' (marked with a red asterisk) and 'Password' (marked with a red asterisk). Below the password field is a link 'Forgot your password?'. At the bottom of the form is a blue 'Login' button. Below the button is the text 'New to Coupa? CREATE AN ACCOUNT'. Three blue circular callouts with white numbers 1, 2, and 3 are overlaid on the form: callout 1 points to the Email field, callout 2 points to the Password field, and callout 3 points to the Login button.

# 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

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. The 'Setup' tab is highlighted under the 'Add-ons' section. Below the navigation bar, the 'Admin Users' section is visible. On the left, there is a sidebar with links for Users, Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main content area shows the 'Invite User' button highlighted. Below this, a table lists existing users. The table has columns for User name, Email, Status, Permissions, Customer Access, and Actions. The first user listed is 'Deloitte Consulting' with email 'edfcoupatesting@gmail.com' and status 'Active'. The table also shows a list of permissions for this user, including ASNs, Admin, Business Performance, Catalogues, Early Payments, Forecast Planner, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The 'Customer Access' column shows 'EDF Renewables (Pty) Ltd'. The 'Actions' column has an 'Edit' link. At the bottom of the table, it says 'Per page: 5 | 10 | 15'.

User name	Email	Status	Permissions	Customer Access	Actions
Deloitte Consulting	edfcoupatesting@gmail.com	Active	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	EDF Renewables (Pty) Ltd	Edit

# 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

The 'Invite User' form is divided into two main sections: 'User details' and 'Permissions and customers'. The 'User details' section includes input fields for 'First Name', 'Last Name', and 'Email'. The 'Permissions and customers' section is split into two columns. The left column, titled 'Permissions', contains a list of checkboxes for various roles: 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'All' (selected), 'Invoices', 'Catalogues', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Timesheets', 'All' (selected), 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The right column, titled 'Customers', contains checkboxes for 'All' and 'EDF Renewables (Pty) Ltd'. At the bottom of the form, there are 'Cancel' and 'Send Invitation' buttons. Numbered callouts are present: 6 points to the 'First Name' field, 7 points to the 'Permissions' section, and 8 points to the 'Send Invitation' button.

The email is from Coupa and is titled 'New Coupa User Added'. It contains the following text: 'Hello Deloitte, A new user, Carol Smith ([edfcoupatesting+carol@gmail.com](mailto:edfcoupatesting+carol@gmail.com)), has been added to your company's Coupa account. This user will now have access to the Coupa Supplier Portal. If you do not recognise this user or would like to cancel this invitation, please reach out to [Coupa Support](#). If you would like to remove this user, or make any changes to their permissions in your company's account, please click the button below.' At the bottom of the email, there is an orange button labeled 'Manage Users'. A numbered callout 9 points to the email content.



# 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

The screenshots illustrate the process of deactivating a user in the Coupa Supplier Portal:

- Step 1:** The 'Setup' tab is selected in the top navigation bar.
- Step 2:** The 'Admin Users' table shows a user 'Carol Smith' with status 'Active'. The 'Edit' button is clicked.
- Step 3:** The 'Edit user access for Carol Smith' form is shown. The 'Permissions' section is expanded, showing various permissions like 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogues', 'Profiles', 'ASMs', 'Service/Time Sheets', 'Restricted Access to Service/Timesheets', 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'.
- Step 4:** The 'Deactivate User' button is highlighted in the bottom right corner of the form.

# 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.

The screenshot shows the Coupa Supplier Portal login interface. At the top left is the 'coupa supplier portal' logo, and at the top right is a 'Secure' indicator with a lock icon. The main heading is 'Login'. Below it are two input fields: 'Email' (marked with a red asterisk) and 'Password' (marked with a red asterisk). A blue circle with the number '1' points to the Email field. Below the password field is a link that says 'Forgot your password?'. At the bottom of the login box is a blue 'Login' button, with a blue circle and the number '2' pointing to it. Below the login box is a link that says 'New to Coupa? CREATE AN ACCOUNT'.

# 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

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text "coupa supplier portal", and user information "DELOITTE" with a dropdown arrow, "NOTIFICATIONS 29", and "HELP" with a dropdown arrow. Below the header is a navigation bar with tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. A sub-navigation bar below this contains "Add-ons" and "Setup", with "Setup" highlighted and marked with a red circle and the number 1. Below the navigation bar, the user's profile is shown for "Deloitte Consulting" with a pink "DC" logo, a progress bar for "Profile Progress 82%", and the text "Last Updated: 16 minutes ago | View Profile". Below the profile section, the "Admin Users" section is visible. On the left, a sidebar menu has "Users" selected, and "Merge Requests" is highlighted with a red circle and the number 2. To the right of the sidebar, there is a table of users. Above the table is a blue bar with "Invite User", "View", a dropdown menu set to "All", and a search bar. The table has columns: User name, Email, Status, Permissions, Customer Access, and Actions. One user is listed: Carol Smith, with email edfcoupatesting+carol@gmail.com, status Deactivated (in a red box), permissions ASNs, Admin, Business, and Performance, and customer access EDF Renewables (Pty) Ltd. The Actions column for this user contains a link "Activate".

User name	Email	Status	Permissions	Customer Access	Actions
Carol Smith	edfcoupatesting+carol@gmail.com	Deactivated	ASNs Admin Business Performance	EDF Renewables (Pty) Ltd	Activate

# 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'.

## Admin Merge Requests



# 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

**coupa** supplier portal

DELOITTE | NOTIFICATIONS 22 | HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance

Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries

Select Customer EDF Renewables (Pty) Ltd

## Purchase Orders

**Instructions From Customer**

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		
EDF000079	19/11/2023	Issued	None	Price Variance 10	No	0.51 EUR		

# 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

**Export to** **View** All **Search**

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		

**Purchase Order #EDF000104**

**General Info**

Status: Issued - Sent via Email  
Order Date: 11/12/2023  
Revision Date: 11/12/2023  
Requester: Yumna Barthus  
Email: yumna.barthus@edf-re.co.za  
Payment Term: 30 DAYS

**Attachments** None

**Acknowledged** ☐

**Assigned to**

**Shipping**

Ship-To Address: 1 Oakdale Road  
Newlands  
Cape Town  
7700  
South Africa  
Attn: Yumna Barthus

Terms: None

**Shipment Tracking**

No package tracking.

**Lines**

**Advanced** **Search** **Sort by** Line Number: 0 → 9

Type	Item	Price	Total	Invoiced
	Coupa services	100,000.00	100,000.00	0.00

Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number
None	None	None	None

# 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

The screenshot displays the 'Comments' section of the Coupa Supplier Portal. At the top, there is a 'Comments' header with a 'Mute Comments' toggle on the right. Below this is a large text input area labeled 'Enter Comment'. Inside this area, there is a placeholder '@' and a link 'Add File | URL'. Below the input area is a small text hint: 'Send comment notification to a user by typing @name (ex: @JohnSmith)'. To the right of the input area is a blue circle with the number '9'. Below the input area is a button labeled 'Add Comment' with a blue circle and the number '10' next to it. Below the 'Add Comment' button is a 'History' section with a clock icon and a blue circle with the number '11' next to it. A blue circle is also visible at the bottom right of the screenshot.

# 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, 'supplier portal', and user information 'DELOITTE' with a dropdown arrow. To the right are 'NOTIFICATIONS 22' and a 'HELP' dropdown. Below the header is a navigation bar with tabs: Home, Profile, Forecasts, Orders (highlighted with a blue box and a '1' in a circle), Service/Time Sheets, ASN, Invoices, Catalogues, and Business Performance. Under the 'Orders' tab, there are sub-tabs: Sourcing, Add-ons, and Setup (highlighted with a blue box). Below these are more sub-tabs: Orders (highlighted with an orange line), Order lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, and Promised Deliveries. A 'Select Customer' dropdown menu is set to 'EDF Renewables (Pty) Ltd'. The main heading is 'Purchase Orders'. Below it is a section 'Instructions From Customer' with a placeholder text: '{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}'. A message says 'Click the [gold coins icon] Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row of data is: EDF000104, 11/12/2023, Issued, None, Coupa services, No, 100,000.00, ZAR. The 'Actions' column for this row has a '2' in a circle next to a gold coins icon.

coupa supplier portal

DELOITTE NOTIFICATIONS 22 HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance

Sourcing Add-ons **Setup**

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries

Select Customer EDF Renewables (Pty) Ltd

## Purchase Orders

**Instructions From Customer**

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		2

# 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 add a remit-to address

5

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

### Choose Invoicing Details

\* Legal Entity

Select

4

+ Add New

\* Remit-To

Select

\* Ship From Address

Select

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

5

\* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the



# 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 EDF in the banking confirmation letter you shared

What address do you invoice from?

6

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country: South Africa

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location where you receive government documents.

☒ Use this address for Remit-To

☒ Use this for Ship From address

\* Payment Type: Bank Account

Banking information

7

Bank Account Country: South Africa

Bank Account Currency:

\* Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Bank Code

\* Account Number:

Confirm Account Number:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

# 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

Select Customer EDF Renewables (Pty) Ltd

### Create Invoice Create

#### General Info

1

\* Invoice #

2

\* Invoice Date

29/01/2024

3

Date of Supply

29/01/2024

Payment Term

30 DAYS

\* Currency

ZAR

Delivery Number

Status

Draft

Image Scan

Choose File

No file chosen

Supplier Note

Attachments

Add File | URL | Text

#### From

\* Supplier

Deloitte Consulting Pty Ltd 1

\* Supplier VAT ID

4999999999

\* Invoice-From Address

Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address

Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
1687  
South Africa

Bank Name:

Standard Bank

Beneficiary Name:

Deloitte Consulting Pty Ltd

Bank Account Number:

\*\*\*\*\*0430

# 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).

Select Customer: EDF Renewables (Pty) Ltd

### Create Invoice [Create](#)

#### General Info

\* Invoice #

\* Invoice Date: 29/01/2024

Payment Term: 30 DAYS

Date of Supply: 29/01/2024

\* Currency: ZAR

Delivery Number  **4**

Status: Draft

Image Scan:  No file chosen

**5** Supplier Note

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

#### From

\* Supplier: Deloitte Consulting Pty Ltd 1

\* Supplier VAT ID: 4999999999

\* Invoice-From Address: Deloitte Consulting Pty Ltd   
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address: Deloitte Consulting Pty Ltd   
5 Magwa Crescent  
Waterfall City  
1687  
South Africa

Bank Name: Standard Bank

Beneficiary Name: Deloitte Consulting Pty Ltd

# 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 EDF .

The screenshot displays the 'Lines' section of the Coupa Supplier Portal. It features a table with columns for Type, Description, Qty, UOM, and Price. The first line item is 'Cleaning chemicals' with a quantity of 10 and a unit price of 5,000.00, resulting in a total of 50,000.00. Below this, there's a section for 'Lines' with a total of 100,000.00. Further down, there are fields for PO Line, Service/Time Sheet Line, Contract, and Supplier part number. A 'Taxes' section includes a 'VAT Rate' dropdown, 'VAT Amount' (0.00), and 'Tax Reference'. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. Numbered callouts 7 through 11 highlight specific steps in the process.

# 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 <a href="#">Disputed invoices</a> .
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

**coupa supplier portal** DELOITTE NOTIFICATIONS 20 HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing

Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Deliveries

### Purchase Orders

Instructions From Customer  
[Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page]

Click the Action to Accept the Purchase Order and Create an Invoice using its data.

Export to: View: All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000016	20/10/2023	Issued	20/10/2023	Implementation	No	1 900 000.00 ZAR		
EDF000015	15/10/2023	Issued	None	Profession accounting services	No	100 000.00 ZAR		(Step 2)

**Lines**

Type	Description	Price
	Profession accounting s	0.00

PO Line: EDF000020-1 Service/Time Sheet Line: None Contract: Agreement1 (Published) Credit Line: None

**Lines**

Type	Description	Qty	UOM	Price
	Office Chair	0	Each	100.00



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.

The screenshot displays the Coupa Supplier Portal login interface. At the top, the header includes the 'coupa supplier portal' logo on the left and a 'Secure' indicator with a lock icon on the right. The main section is titled 'Login' and features two input fields: 'Email' and 'Password'. Below these fields is a link that says 'Forgot your password?'. A prominent blue button labeled 'Login' is centered below the fields. At the bottom of the login box, there is a link for 'New to Coupa? CREATE AN ACCOUNT'. A blue circular callout with the number '1' is placed next to the 'Email' input field, corresponding to the first step in the process steps listed on the left.

# 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.

**coupa** supplier portal

DELOITTE NOTIFICATIONS 22 HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance

Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Deliveries

Select Customer EDF Renewables (Pty) Ltd

## Purchase Orders

**Instructions From Customer**

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the 🍀 Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00		
EDF000079	19/11/2023	Issued	None	Price Variance 10	No	0.51 EUR		

Chat w

# 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 **partial** credit notes.

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

**Credit Note**

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

**Reason** ☒ Resolve issue for invoice number ☐ Other (e.g. rebate)

Invoice76009

Cancel Continue

**Credit Note**

How do you want to correct invoice "Invoice76000" ?

☒ Completely cancel the invoice with a credit note ☐ Adjust invoice with a credit note

Cancel Create

# 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 to date on which the credit note was created.

### 9 Credit Reason

The reason for creating the credit note.

## Create Credit Note Create

This credit note applies to invoice [Testing Approval of Non PO invoice](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

7

**General Info**

8

\* Credit Note #

\* Credit Note Date

Payment Term 7 days

Original Date of Supply

\* Currency

Delivery Number

Status Draft

Original Invoice Number Testing Approval of Non PO invoice

Original Invoice Date 18/10/2023

Image Scan  No file chosen

Supplier Note

9

Attachments  [URL](#) [Text](#)

\* Credit Reason

From

\* Supplier Deloitte & Touche

\* Supplier VAT ID 4999999999


\* Invoice-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Midrand  
Gauteng  
2066  
South Africa


\* Ship-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Midrand  
Gauteng  
2066  
South Africa

To

Customer EDF Renewables (Pty) Ltd

 **EDF**  
renewables

Coupa Supplier Portal Manual | April 2024

 **coupa**



# 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

Lines

Adjustment Type  Quantity

Type	Description	Qty	UOM	Price	
<input type="text"/>	Testing	-1.0	Box	1,000.00	-1,000.00

Adjustment Type  Price

Type	Description	Qty	UOM	Price	
<input type="text"/>	Testing	1.000	Box	-1,000.00	-1,000.00

Invoices

Instructions From Customer  
(Example text - this is set on your Company information setup page and will be displayed for CSP and SAN suppliers on the invoice list page)

Create Invoices

Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note

Export to:  View: Credit notes  Search:

Invoice #	Invoice Date	Original Invoice Number	Gross Total	Comments	Actions
CRN2967	20/10/2023	Inv2967	-5,750.00 ZAR		
Credit note play back 2-1	20/10/2023	last play back 4-3	-11,600.00 ZAR		
Test123	19/10/2023	Invoice7600	100,000.00 ZAR		
CR7600	19/10/2023	Invoice7600	-1,150.00 ZAR		
Testing Approval	18/10/2023	Testing	-100.00 ZAR		
CN testing	18/10/2023	Voiding Invoice	-500.00 ZAR		
CN Testing	18/10/2023	Voiding Invoice	-1,000.00 ZAR		

Per page: 15 | 45 | 90

Total Taxes

Lines Net Total	-1,000.00
Lines VAT Totals	-0.00

Shipping

Handling

Misc

Total VAT: 0.00

Net Total: -1,000.00

**Gross Total: -1,000.00**

Delete Cancel Save as draft Calculate **Submit**



09

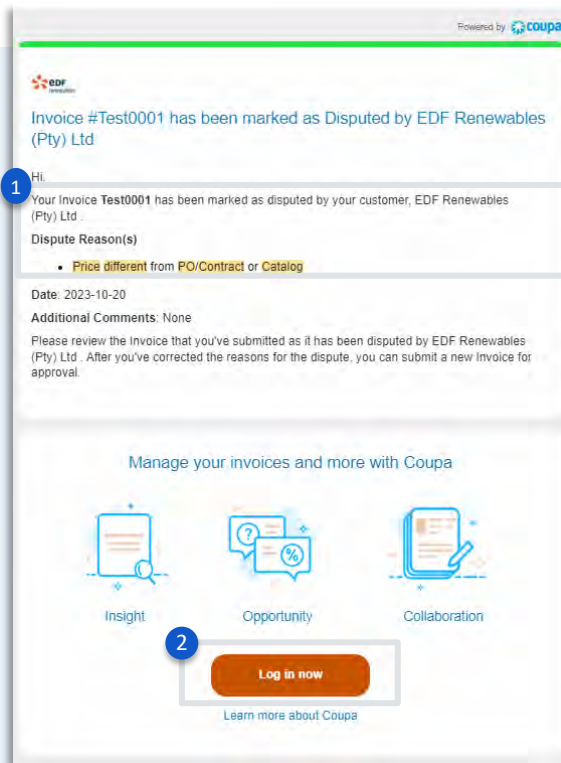
## How to Resolve Disputed Invoice

# 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'DELOITTE', 'NOTIFICATIONS 22', and 'HELP' are on the right. A navigation bar contains links: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices (highlighted with a blue box and a circled '3'), Catalogues, and Business Performance. Below this is a sub-navigation bar with Sourcing, Add-ons, and Setup. The main content area is titled 'Invoices' and includes a 'Select Customer' dropdown menu set to 'EDF Renewables (Pty) Ltd'. Below the title, there's a section 'Instructions From Customer' with a placeholder text. A 'Create Invoices' section contains buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. At the bottom, there's a table of invoices. The table has columns: Invoice #, Invoice Date, PO #, Gross Total, Disputed Date, Commented, Dispute reason, Comments, and Actions. The first row is highlighted in blue and shows 'Test invoice -CSP' with a date of 06/11/2023, PO # None, Gross Total 0.00 ZAR, Disputed Date 07/11/2023, Commented None, and Dispute reason 'Tax rate missing or incorrect'. The second row shows 'Test0001' with a date of 20/10/2023, PO # EDF000019, Gross Total 100,000.00 ZAR, Disputed Date 20/10/2023, Commented None, and Dispute reason 'Price different from PO/Contract or Catalog'. A circled '4' points to the 'View' dropdown menu, which is set to 'Disputed'. A circled '5' points to the 'Actions' column for the second row.

**coupa supplier portal** DELOITTE NOTIFICATIONS 22 HELP

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance

Sourcing Add-ons Setup

**Invoices** Invoices Lines Payment Receipts

Select Customer EDF Renewables (Pty) Ltd

## Invoices

**Instructions From Customer**

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

**Create Invoices**

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View Disputed Search

Invoice #	Invoice Date	PO #	Gross Total	Disputed Date	Commented	Dispute reason	Comments	Actions
<a href="#">Test invoice -CSP</a>	06/11/2023	None	0.00 ZAR	07/11/2023	None	Tax rate missing or incorrect		
<a href="#">Test0001</a>	20/10/2023	EDF000019	100,000.00 ZAR	20/10/2023	None	Price different from PO/Contract or Catalog		

# 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.

Select Customer EDF Renewables (Pty) Ltd

Invoice #Test0001 [Back](#)

6 Please review the invoice and determine the resolution option:

**Void**  
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

**Correct Invoice**  
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

**Total Taxes**

Lines Net Total	100,000.00
Lines VAT Totals	0.00
Shipping	0.00
Handling	0.00
Misc	0.00
Total VAT	0.00
Net Total	100,000.00
<b>Gross Total</b>	<b>100,000.00</b>

7 [Correct Invoice](#)



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).

The screenshot displays the Coupa Supplier Portal interface for Deloitte Consulting. The top navigation bar includes links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. The user's name, DELOITTE, and a notifications bell icon with 29 alerts are visible. The main content area is titled "Review your profile details" and includes a message: "Your profile helps you get discovered by buyers spending billions of pounds every year. Review your profile details to make sure it's up to date. You can always edit, add or remove your information in your profile at any time." Below this, a yellow banner states: "More than one value was found for some of the information below. Select the correct information to save to your profile." The profile details are organized into sections: "Environmental, Social, Governance & Diversity" (with an "Edit Section" button), "Supplier Diversity & Inclusion", "Diversity Classifications and Certifications" (including a radio button for "Black owned business (South Africa)" and a link to "Check it here" for more information), "Tier Two Supplier Diversities", and "Anti-Bribery & Anti-Corruption". The "Registered Address" section contains fields for Address Line 1 (SANDERSON HOUSE, 22 STATION), Address Line 2, City (LEEDS), State, Postcode, and Country/Region (United Kingdom). At the bottom right, there are buttons for "Skip for Now" and "Update Profile".

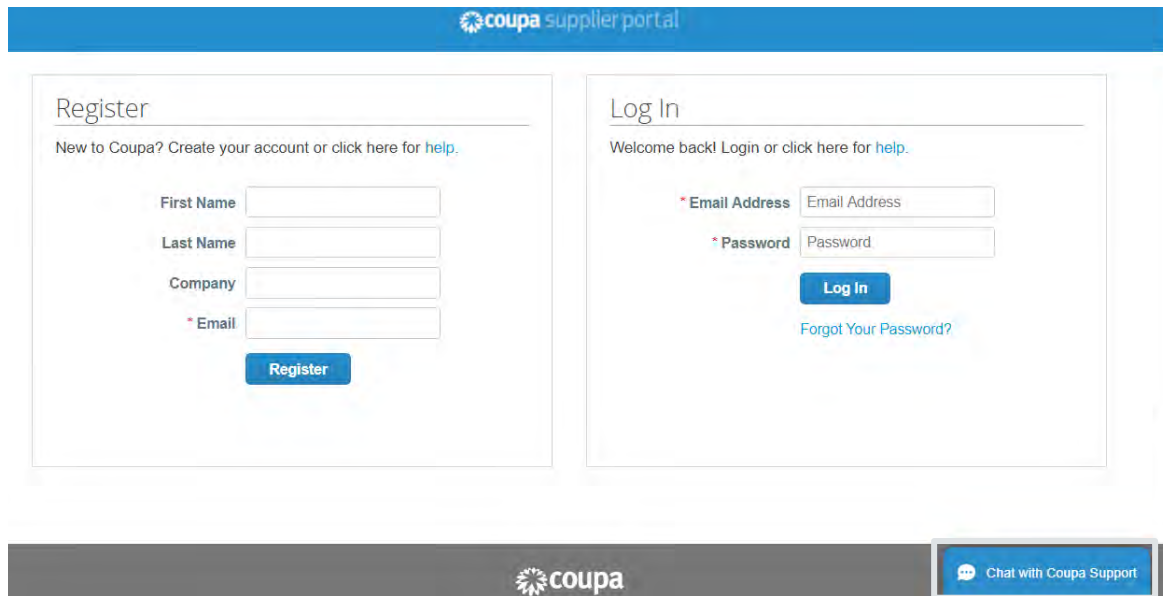


## How to Log a Call with Coupa

# 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



The screenshot displays the Coupa Supplier Portal interface. At the top, a blue header bar contains the 'coupa supplier portal' logo. Below this, the page is divided into two main sections: 'Register' on the left and 'Log In' on the right. The 'Register' section includes a heading 'Register', a sub-header 'New to Coupa? Create your account or click here for [help](#).', and four input fields labeled 'First Name', 'Last Name', 'Company', and '\* Email'. A blue 'Register' button is positioned below these fields. The 'Log In' section includes a heading 'Log In', a sub-header 'Welcome back! Login or click here for [help](#).', and two input fields labeled '\* Email Address' and '\* Password'. A blue 'Log In' button is located below the password field, and a link for 'Forgot Your Password?' is positioned below the 'Log In' button. At the bottom of the page, a dark grey footer bar contains the 'coupa' logo on the left and a blue button labeled 'Chat with Coupa Support' on the right.

# 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.

The screenshot shows the Coupa Supplier Portal interface for Deloitte Consulting. The header includes the Coupa logo, the company name 'coupa supplier portal', and user information 'DELOITTE' with a dropdown arrow. There are also 'NOTIFICATIONS' with a red badge showing '21' and a 'HELP' dropdown. The main navigation bar contains links: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. Below this is a secondary bar with 'Add-ons' and 'Setup'. The main content area features a profile card for 'DC Deloitte Consulting' with a 'Profile Progress 82%' indicator and a 'View Profile' link. To the right of the profile card is an 'Announcements' section. Below the profile card is a 'Recent Activity' section with a search bar containing 'EDF Renewables (Pty) Ltd'. The activity list includes several entries for 'Invoice # Invoice' and 'Order # EDF000104' with details like currency and status. A vertical timeline on the right side of the activity list shows dates and statuses: 'Dispute withdrawn' (25 Jan), 'Paid' (24 Jan), 'Disputed' (20 Dec), 'Issued' (11 Dec), and 'Approved' (29 Nov). At the bottom right, there is a blue button labeled 'Chat with Coupa Support' with a '1' in a blue circle next to it.

# 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.

Chat with Coupa Support

1

\* First Name Yumna

\* Last Name Barthus

\* Email [redacted]@edf-re.co.za

Phone

\* Issue Related To Select Issue

Subject to Coupa [Terms of Use](#) and [Privacy Policy](#).

2

Start Chat

Prefer Phone Support?

Chat is free and fast, or you can upgrade to phone support

UPGRADE NOW



Thank You