coupa

Coupa Supplier Portal Admin and User Guide

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Announcements and General Info

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See which CSP features were introduced in which release.

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CSP Features by Release

The following table gives an overview of the Coupa Supplier Portal (CSP) features introduced in various Coupa releases.

Release	Feature	Description
Release 29	Supplier Onboarding with Additional Profile Information	The supplier onboarding flow includes additional details.
	New Remit-To Experience for Suppliers	You are guided through the process of providing remit-to information.
	Other CSP Enhancements	You can view tables with invoice lines and SFTP errors, you can see a reCAPTCHA before merging requests, and are notified when you are deactivated or reactivated and if you have too many active login sessions. The following new notification preference settings are available: Digital Check Canceled, Virtual Card Canceled, and Receipt created. When you decline to respond to supplier information requests, you need to provide a comment. Depending on your customers' settings, you can see payment agreements on POs.
	New Payments Page for Suppliers	The new Payments page shows a summary of overdue payments, early payment discount requests, tasks, and payment preferences to help you collect and reconcile your receivables from your customers that use Coupa Pay.
Release 28	Smart Onboarding of Suppliers in the CSP	When you register or log in to the CSP to do business with a customer that uses an onboarding flow, you can see a welcome message and are guided through the process of providing the customer with the necessary information.
	Supplier Business Performance	You can view a summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.
	Updated CSP Customer Profile Sync	You can use an external supplier update (system) form to update your profiles for your non-SIM customers.
	View Public Sourcing Events in the CSP	You can access and participate in public sourcing events.
	Other CSP Enhancements	You can see dispute reasons in the table of invoices and are notified of PO cancelations and PO acknowledgement requests.
Release 27	CSP Profile Data Reuse	You can reuse your CSP public profile information in Supplier Information Management (SIM) and email your non-SIM customers for help to update your customer profiles.

Release	Feature	Description
	One-Click Savings	You can benefit from savings opportunities provided by other suppliers through the Coupa Advantage program.
	Other CSP Enhancements	Public and customer-specific profiles are more clearly differentiated, and customer-specific profile pages include information about which customers do not allow profile changes by default. Also, users are arranged in alphabetical order and the user permissions are enhanced to provide targeted access to orders and service/time sheets.
Release 26	Enhancements to the CSP Home and Profile Pages	The CSP has additional fields for the public profile and displays a profile summary.
	Restricted Access to Orders and Service/ Time Sheets in the CSP	As a supplier administrator, you can decide which supplier users can access POs, PO changes, and service/time sheets.
	Improved Emails to Suppliers	Some frequent emails from your customers have a new look and feel and enhanced content.
	Enhancements to Collecting Remit-To Information in the CSP Supplier Remit-To Redesign	You can provide more remit-to types and add this information to your legal entities in the CSP so that your customers can use different payment methods when working with you.
Release 25	Announcements to Suppliers in the CSP	Your customers can create custom announcements to be shown to you in the CSP.
	cXML Error Notifications to Suppliers	If you use cXML, you can receive notifications of and view cXML submission errors.
	Enhancements to the CSP Home and Profile Pages	The CSP displays profile completeness allowing you to see at a glance if you need to provide more details in your profiles. Also, if your customers use Supplier Information Management (SIM), the information you submit through SIM forms can be reused in your public profiles in the CSP without having to enter the same information twice.
	Improved PO Emails to Suppliers	PO emails you receive have a new look and feel, enhanced content, and the improved ability to create a CSP account from emails.
	Supplier Support Chat	Whether logged in to the CSP or not, you can get help from Coupa Support also through chat.
	Early Payment Discount Term Segments	Your customers can assign specific Coupa Accelerate payment terms to you. You can accept customer-specific payment terms and choose to apply them globally.

Release	Feature	Description
Release 24	SFTP Account for Suppliers	You can create and manage SFTP accounts for your CSP instances.
	Digital Check Payment in the CSP	If your customers use Coupa Pay, you can accept payment through digital checks that you can download and print from the CSP.
Release 23	Supplier Add-ons	An add-on is a value-creating product or service that you can begin to use or express interest in using, for example, Coupa Advantage, Coupa Accelerate, or invoice financing. As an admin, you can access all these add-ons from one page in the CSP.
	Invoice Creation and Other Improvements	You can create invoices and enter payment information more easily due to a more intuitive user interface, and can enjoy a better user experience.
Release 22	Supplier Notifications for Increased Accelerate Adoption	You are notified when your customers enable Coupa Static Discounting and they are ready to accept early payment discount offers, and you can act quickly on orders that can be accelerated.
	Bulk Export Legal Invoices	You can bulk export all the legal invoice attachments in a `.zip` file.
	Create CSP Accounts from PO Emails and Forward Invites	You can create CSP accounts by clicking on a button in a purchase order (PO) email.
Release 20	CSP Two-Factor Authentication with SMS	You can use SMS messaging to validate your credentials when prompted by two-factor authentication.
	Early Payment Discount Terms at Transaction Level	You can choose the type of early payment discount you want for each purchase order you receive and each invoice you send. If your choice matches one of the discount terms on your Coupa customer side, that discount is automatically assigned to the transaction.
Release 18	CSP Service (Time) Sheets	You can manage service/time sheets in the CSP.
	CSP User Experience Improvements	The Coupa Supplier Portal (CSP), formerly the Coupa Supplier Network (CSN), upgraded its graphical user interface (GUI) to optimize better for mobile devices.
	Customer-Enforced Two-Factor Authentication in CSP	Two-factor authentication can be mandatory.
	Global Early Payment Discount Terms in CSP	You can set preferred accelerated payment terms (early payment discounts terms) in the CSP.
	Purchase Order Lines in CSP	You can view purchase order (PO) lines with Advance Ship Notice (ASN) "shipping status" information from the CSP.

Release	Feature	Description
Release 17	Automatic Navigation to Supplier Profile Update	You are taken from a Supplier Information Management (SIM) email to update your profile directly in the CSP.
	Public Profile Notifications Turned Off	Public Profile Update notifications are turned off by default.
	Recently Used Remit-To Address	A recently used remit-to address is the first on the list of remit-to addresses.
	SMS Notifications from Coupa Supplier Portal	You can receive notifications in a text message (SMS).

For more information, see Changes in the CSP Documentation.

Changes in the CSP Documentation

Changes for the January 2021 Release

Topic	Change	Details
View Business Performance Data	Updated	The layout of the customers list and the order/invoice summary dashboards has changed.
View and Manage Remit-to Information	Updated	Changed title from *View Remit-to Information*. Updated to reflect the changes to the **Remit-To** page and to adding remit-to accounts.
Set up Legal Entities	Updated	Added information about pre-populating the remit-to fields on SIM form responses. Updated to reflect the changes to providing remit-to information.
Create or Update Your Profiles	Updated	Updated to show the new option of applying selected payment terms to all the customers and the new pages in the onboarding flow. Also, updated to reflect the removal of the **Diversity Certificates** field from the **Profile** edit page.
Manage Merge Requests	Updated	Replaced the screenshot of the **Admin / Merge Requests** page to show the disclaimer and the reCAPTCHA.
View and Manage Notifications	Updated	Added notification preference setting options for canceled digital checks, virtual cards, and created receipts.
Manage Users	Updated	Added information about reactivating users.
Admin Page	Updated	Added information about viewing SFTP file upload errors.
Log in to the CSP	Updated	Added information about multiple sessions and user deactivation.
View and Manage Payments	New	Provided instructions on how to view and manage payment-related information.
View SFTP File Upload Errors	New	Provided instructions on how to view SFTP file upload errors.
View Invoice Lines	New	Provided instructions on how to view invoice lines.

Changes for the September 2020 Release

Topic	Change	Details
Create SFTP Accounts	Updated	Added a note about required SFTP clients.
Create Custom Views	Updated	Added information about how to delete a custom view.
Create or Update Your Profiles	Updated	Updated with information about how to reuse public profile information in customer-specific profiles. Added information about how to update your customer profile through an onboarding flow.
Set up Legal Entities	Updated	Added a tip about the tooltips showing the number and type of characters allowed in the banking information fields depending on the selected bank account country.
Access Add-ons	Updated	Updated to reflect the changes on the **One-Click Savings** and **Express Interest** pages.
Create or Edit an Invoice	Updated	Replaced the screenshot of the **Invoices** page to show the addition of the **Dispute Reason** column to the **Invoices** table.
View and Manage Invoices	Updated	Updated to show the addition of the **Dispute Reason** column to the **Invoices** table.
Log in to the CSP	Updated	Removed the warning and note about the banner listing permissions. Updated with information about the new login page with the welcome message.
Create Your Account	Updated	Added a note about the case when you join the CSP from one of two simultaneous invitations. Added **Proposal Manager** to the list of available roles within the **Sales** department. Updated with information about the new registration page with the welcome message.
Manage Users	Updated	Updated to show that the **Admin** main menu item has moved under the new **Setup** main menu item. Replaced the screenshots to show the new **Business Performance** and **Sourcing** tabs and the **Business Performance** and **Sourcing** permissions necessary to see them. Also, updated the table with the new permissions. Added more details about how to use the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets**

Topic	Change	Details
		permissions.
View and Manage Notifications	Updated	Added notification preference setting options for canceled orders, granted permission for viewing business performance, and bank transfer, virtual card, and zero payment remittance advice.
Navigate and Get Help	Updated	Updated with information about the **Business Performance** menu item.
View Business Performance Data	New	Provided instructions on how to view a summary of orders and invoices that may need attention, year-to-date order and invoice trends, and lead time to shipping goods.
View Public Sourcing Events	New	Provided instructions on how to view public sourcing events.
CSP Videos	Updated	Added a new video about the customer-branded welcome message and updated existing videos.
CSP Features by Release	Updated	Added information about the features introduced in this release.

Changes for the May 2020 Release

Topic	Change	Details
Access Add-ons	Updated	Updated to reflect the changes in content and layout and to provide details about the One-Click Savings add-on.
CSP Videos	Updated	Added a new video about One-click Savings.
CSP Features by Release	Updated	Added information about the features introduced in this release.

Changes for the January 2020 Release

Topic	Change	Details
View and Manage Notifications	Updated	Updated to reflect that the notification preference setting **A new comment is received** for **Form Responses** is enabled by default for new suppliers. Added new notification preference settings. Also, added information about stopping SMS notifications by replying STOP.
View and Manage Invoices	Updated	Added information about the **Totals with Early Payment Discount** section on legal invoices.
View and Manage POs	Updated	Added information about the tooltip text of the icon for flipping a PO into an invoice. Added information about the new **Assigned To** column.
View and Manage Service/Time Sheets	Updated	Added information about the new **Assigned To** column.
Register for the CSP	Updated	Updated the information about the content and format of email invitations.
Create Your Account	Updated	Updated to reflect the new **Department** and **Role** fields.
Create or Update Your Profiles	Updated	Added information about the profile summary, the **Learn More** link, and the new fields on the **Public Profile** page.
Manage Your Account	Updated	Updated to reflect the change of the page title from **My Account Password** to **My Account Settings,** the new **Department** and **Role** fields, and the **User Details** and **Change Password** sections.
Manage Users	Updated	Added information about the **Restricted Access to Orders**, **Restricted Access to Service/Time Sheets**, and **Pay Me Now** permissions.
Invoices	Updated	Added information about how long legal invoices are available for download.
Navigate and Get Help	Updated	Replaced the screenshot of the **Home** page to show the new **Profile Summary** section and reflect the other changes to the profile. Replaced the screenshot of the contact information pop-up for chatting with Coupa Support to show the new text stating that the Coupa Support chat is only for technical issues with the CSP.

Topic	Change	Details
Admin Page	Updated	Updated to reflect that **E-Invoicing Setup** has changed to **Legal Entity Setup**.
Create or Edit an Invoice	Updated	Updated to reflect the changes to adding new or choosing existing invoicing details. Added information about the tooltip text of the icon for flipping a PO into an invoice and about the fields that cannot be edited if customers mandate PO acceptance.
Set up Legal Entities	Updated	Changed title from *Set up E-Invoicing*. Updated to reflect the changes in setting up legal entities. Changed the requirement of 4-28 digits to 4-28 characters for the **Account Number** field. Added details about how to fill in the **What is your Tax ID?** section in the absence of a tax ID number.
CSP Videos	Updated	Added a new video about the profile summary and additional fields.
CSP Features by Release	New	Provided information about which CSP features were introduced in which release.

Changes for the September 2019 Release

Topic	Change	Details
Create an Invoice from a PO, *Create a Credit Note*	Removed	Moved the content of these topics to Create or Edit an Invoice.
Create or Edit an Invoice	Updated	Updated with content from topics *Create an Invoice from a PO* and *Create a Credit Note*, and added instructions on how to create a blank invoice and an invoice from a contract.
CSP Videos	Updated	Updated the videos for Intro, Help, Profile, Orders, Invoices, Catalogs, and Admin. Also, added new videos about profile progress, announcements, and creating invoices.
Register for the CSP	Updated	Updated the information about registering to the CSP from a PO email.

Topic	Change	Details
Set up E-Invoicing	Updated	Added information about the **Account Number** field digit count limit being increased.
Navigate and Get Help	Updated	Provided instructions on how to chat with Coupa Support to get help. Also, replaced the screenshot of the **Home** page to show the sections for profile progress and announcements.
Create or Edit an Invoice	Updated	Added information about the possibility to update PO references on invoice lines and add PO lines from other orders.
Manage Users	Updated	Added information about the Order Changes permission.
View and Manage Notifications	Updated	Added notification preference setting options for customer announcements, integration errors, rejected PO change requests, and Coupa Pay new virtual cards, reissued virtual cards, and virtual card reminders. Also, updated to reflect the new **Announcements** filter option on the **My Notifications** page.
Create or Update Your Profiles	Updated	Added information about the profile progress indicator and the new fields on the **Public Profile** page.
View and Manage Invoices	Updated	Replaced the screenshot of the **Invoices** page to show the position of the buttons for creating invoices or credit notes.
View and Manage POs, View PO Lines	Updated	Replaced the screenshot of the **Orders** page to show the **Order Changes** and **Order Line Changes** tabs.
Admin Page	Updated	Added information about viewing cXML submission errors.
Manage Merge Requests	Updated	Replaced the screenshot of the **Admin Merge Requests** page to show all the tabs on the page.
Set Coupa Accelerate Preferences	Updated	Updated to reflect the possibility to select customer-specific payment terms and apply them globally.
Create Custom Views	Updated	Added information about the new pages that have tables.
Edit a PO	New	Provided instructions on how to request

Topic	Change	Details
		changes to POs and add shipment tracking information.
View Customer Announcements	New	Provided instructions on how to view announcements from customers.
View cXML Submission Errors	New	Provided instructions on how to manage notifications of and view cXML errors.

Changes for the May 2019 Release

Topic	Change	Details
Set Coupa Accelerate Preferences	Updated	Removed notes informing users that after logging in they need to navigate to pages that they tried to access from URLs without being logged in initially. Users that click on links to CSP pages without being logged in are now directed to the relevant pages (not to the **Home** page) after logging in.
Set up E-Invoicing	Updated	Added information about the **Account Number** field digit count limit being increased from 17 to 19.
Manage Users	Updated	Replaced the screenshots to show the new **Payments** tab and the Payments permission necessary to see it. Also, updated the table with the new permission.
Admin Page	Updated	Added information about creating SFTP accounts.
View Service/Time Sheet Lines	Updated	Updated to reflect the changes in layout and information provided on service/time sheet lines to support partial acceptance of services.
View and Manage POs	Updated	Added a tip about adding comments to POs that suppliers do not accept and want to reject.
View and Manage Notifications	Updated	Added notification preference setting options for abandoned invoices and Coupa Pay new digital checks.

Topic	Change	Details
View and Manage Invoices	Updated	Added information about the new Abandoned invoice status.
Create or Edit an Invoice	Updated	Added information about invoices associated with digital checks and bank transfers being populated with payment information.
Navigate and Get Help	Updated	Replaced the screenshot and updated the table to show the new **Payments** tab.
Log in to the CSP	Updated	Updated the **Additional Features** page of the **Welcome tour** with information about the new **Payments** page.
View and Download Digital Checks	New	Provided instructions on how to view and download digital checks.
Create SFTP Accounts	New	Provided instructions on how to create and manage SFTP accounts.

Changes for the January 2019 Release

Topic	Change	Details
View Remit-to Information	Updated	Updated to show that new remit-to addresses can be created/added directly when creating invoices.
Set up E-Invoicing	Updated	Updated to reflect the changes in setting up legal entities.
Create a Credit Note	Updated	Updated to reflect the changes on the **Create Invoices** page.
Create or Edit an Invoice	Updated	Updated to reflect the changes on the **Create Invoices** page and in how an invoice is created from a contract.
Create an Invoice from a PO	Updated	Updated to show that new remit-to addresses can be created/added directly when creating invoices.
Create or Edit a Service/Time Sheet	Updated	Updated with information on service/time sheet lines.
View PO Lines	Updated	Added information on new PO line fields for services.

Topic	Change	Details
View and Manage Service/Time Sheets	Updated	Replaced the screenshot to show the new **Service/Time Sheet Lines** subtab.
Navigate and Get Help	Updated	Replaced the screenshot of the **Help Tour** with a reference to the section on the updated welcome tour. Replaced the screenshot and updated the table to show the new **Add-ons** tab.
Create or Update Your Profiles	Updated	Added a note stating that changing the customer-specific profile might update the supplier information that the specific customer has on record.
Log in to the CSP	Updated	Added information on the new welcome tour.
Register for the CSP	Updated	Updated with information on the changed subject line, content, format, and style of the email invitations.
View Service/Time Sheet Lines	New	Provided information on viewing service/time sheets at line level.
Access Add-ons	New	Provided information on the add-ons that admins can access.

Changes for the September 2018 Release

Topic	Change	Details
Register for the CSP	Updated	Updated with information on additional options to register for the CSP.
Create Your Account	Updated	Updated with information on forwarding your invitation to the CSP.
Log in to the CSP	Updated	Added information on the banners that warn about permissions.
View and Manage Notifications	Updated	Added notification preference setting options for form response reminders, early payment opportunities, and legal invoice export results.
View and Manage Invoices	Updated	Added information about downloading all the legal invoice attachments in one compressed file.
Set Coupa Accelerate Preferences	Updated	Updated with instructions on how to

Topic	Change	Details
		accelerate orders from PO emails and information on notifications of customers who are ready to accept early payment discount offers.
CSP FAQ / Invoices	Updated	Added a note to the *Why can't I edit, void, or delete an invoice?* frequently asked question. Updated the *What does the Export to button do?* frequently asked question with information on bulk exporting legal invoices and increased export size limitation.

Changes for the May 2018 Release

Topic	Change	Details
CSP FAQ / Other	Updated	Added a frequently asked question about archiving information in the CSP.
Register for the CSP, Create Your Account, and Log in to the CSP	Updated	Replaced the screenshot of the **Register/Log In** page to show the newly added links where you can get help with registering and logging in.
Create or Edit an Invoice	Updated	Added information on the warning message that you might get if you try to submit an invoice that does not meet your customer's requirements.
View and Manage Notifications	Updated	Added two new notification preference setting options.
Manage Users	Updated	Replaced the screenshot of the **Edit user access for [User Name]** window to show that the **Deactivate User** button is inactive for the user who is logged in. Also, added a note to explain the reason.

Changes for the January 2018 Release

Topic	Change	Details
Create or Edit an Invoice	Updated	Added a note stating that it is not possible to pick lines from POs when creating an invoice.

Topic	Change	Details
Enable or Disable Two-Factor Authentication and Log in to the CSP	Updated	Updated with instructions on how to use SMS messaging to validate your credentials when prompted by two-factor authentication.
View and Manage Notifications	Updated	Updated with information on new notification preferences that you can set to get notified if your customer sends you a comment or replies to your question/comment about unclear sections of the SIM update request form or provides a reason for rejection.
Set Coupa Accelerate Preferences	Updated	Updated with instructions on how to set early payment discount terms at transaction level, that is, for specific orders and invoices for some or all customers.
View and Manage Invoices	Updated	Updated with information on resolving disputed invoices.
Create a Credit Note	New	Provided instructions on when and how to create a credit note.

Get Started with the CSP

This chapter contains the following topics:

Register for the CSP

Self-register at supplier.coupahost.com, get an invitation email from your Coupa customer, forward an invitation to a peer, or create an account from a PO email.

Create Your Account

After receiving an invitation, create your CSP account.

Log in to the CSP

See how to log into the CSP using single or two-factor authentication.

Create Custom Views

Change the view settings depending on how you want to see information on orders, invoices, catalogs, service/time sheets, ASNs, or payments for each customer.

Create or Update Your Profiles

Update your public and customer-specific company profiles.

Enable or Disable Two-Factor Authentication

Enable two-factor authentication for additional security.

Manage Your Account

Change your personal information, set your notification preferences, or enable/disable two-factor authentication.

Navigate and Get Help

Learn where to find what in the CSP, including help.

View and Manage Notifications

View your notifications and set your notification preferences.

Register for the CSP

You have the following options to register for the CSP:

Method	Benefits	Considerations
Customer-created invitation	You get a custom-invitation with specific instructions and a proactive message from your customer. When you accept the invitation and create your account, you are automatically connected/linked to the customer who invited you.	You have to wait for your customer to send the invitation email. This means that you might not get invited due to your customer forgetting or not having the time to send the invitations to all their suppliers.
Self-created invitation	You can set up your accounts ahead of time, add multiple users, set up your login preferences, and update your profile more quickly.	You need to connect manually to your customers in Coupa. Let your customer know that you registered and you want to connect with them. Customers can connect with you through their Supplier Portal Directory, or by sending an invitation email to any of the CSP supplier users on the account. However, if you are invited using a different email, that email can log in but will have to merge with the account that was set up ahead of time in order for all the supplier users to be on the same account and linked to the customer.
Purchase order (PO) email	Your customer does not have to proactively manage invitations and reminders for you to get connected through the CSP. You can create a CSP account without requiring an invitation if you use Supplier Actionable Notifications (SAN), InvoiceSmash, or other PO methods. As PO emails are a frequent communication channel between you and your customers, you have more opportunities to create a CSP account and enjoy its benefits.	None
Forwarded invitation from a coworker	You can easily invite others within your organization to the CSP by forwarding them your PO email notification or by sending them an invitation from the create account page. You end up with the right supplier user(s) linked to and transacting electronically through the CSP with less work.	You can forward the invitation only to email addresses with the same domain. However, this ensures more built-in security.

With all methods, you need access to the email address you are going to use for the account.

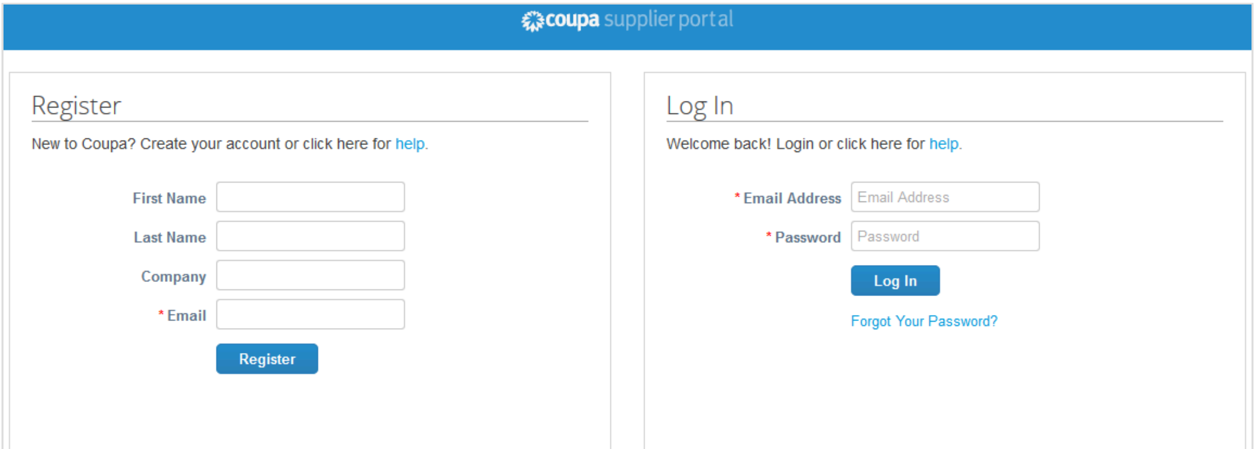
Your CSP account is based on a specific email address. If you use an email address different from the one your Coupa customers have on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

Customer-created invitation

Ask your customer to send you an invitation to the CSP.

Self-created invitation

Go to supplier.coupahost.com and in the **Register** pane on the left, fill in the mandatory (email) field (marked with an asterisk), and then click **Register** to request an invitation.



In both cases, you receive an email invitation with a different subject line, depending on whether the invitation was sent by your customer or was initiated by you.

If the email was initiated by your customer, it contains the customer logo instead of the Coupa logo.

Tip: If you do not receive your invitation email, check your spam folder.

The email contains instructions and links to useful information, and buttons for joining the CSP or forwarding the invitation. Depending on your customers' settings, your invitation emails might look different and have different sections. For example, if your customer enabled new email formats, your email has the following sections:

Section	Description
Top section	Section specific to the type of the email. Depending on the type of email, it also contains relevant buttons, for example, to register for the CSP.
More about the CSP / Do More with the CSP / Get Connected with the CSP	Provides basic information about the CSP, its benefits, and a link to **Learn more** about [Coupa for Suppliers]() or **Get Started** with the CSP. Depending on the type of email, it also includes instructions.
What is Coupa?	Provides a short introduction to Coupa and a link to **Find out more** about [Coupa for Suppliers]().

Note: For the new email format, only Microsoft Outlook version 16 is supported.

Forwarded invitation

You can invite others to the CSP by forwarding them your PO email notification with the **Create Account** button, by clicking on the **Forward This** button in your CSP invitation email, or by sending them an invitation from the create account page.

> **Warning:** You can forward the invitation only to email addresses with the same domain.

An invitation to the CSP is sent to the email address that you specified.

When the invited user clicks on the **Join Coupa** button in the email, the user is directed to create an account to the CSP.

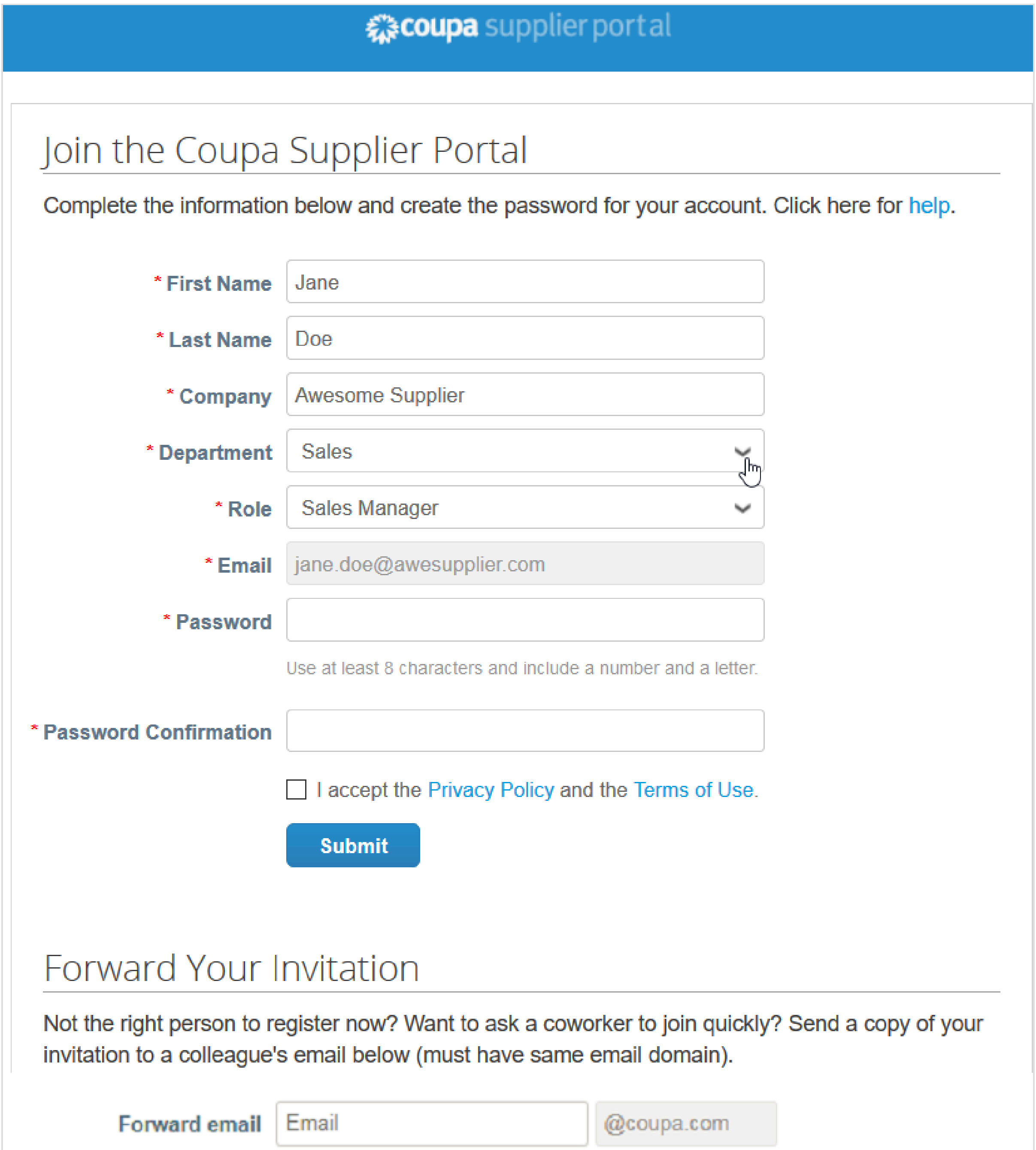
If the user is already linked to the CSP or tries to create an account from an expired invitation, the user is directed to the **Register / Login** page where a red message bar displays the following: "Your invitation has expired or already been activated."

> **Warning:** Invitations to the CSP expire after 30 days.

Create Your Account

Join the CSP

After following the link from an invitation email (other than customer-created invitation), fill in the mandatory fields to provide basic information for your account and your company's public profile.



Setting	Description
*First Name	Your personal first name to be applied to your personal account.

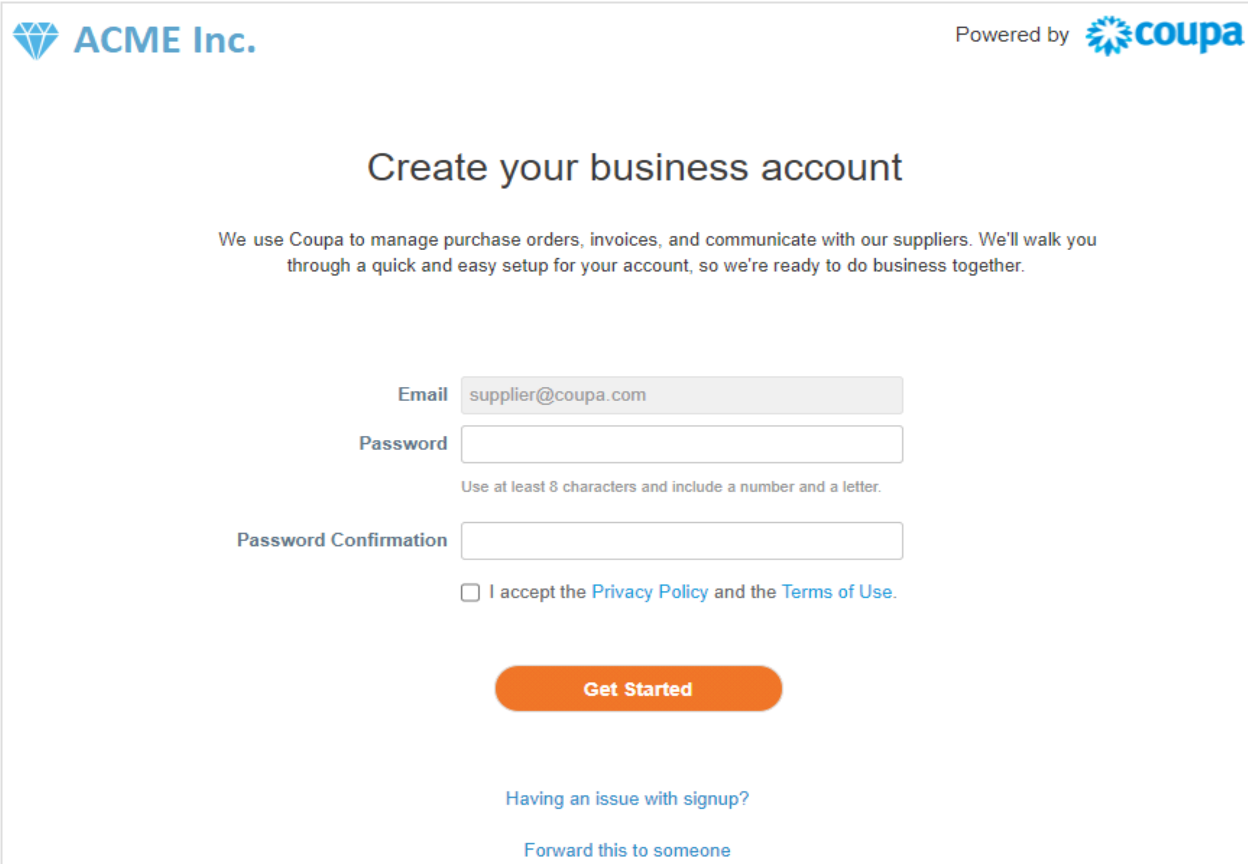
Setting	Description
*Last Name	Your personal last name to be applied to your personal account.
*Company	The name of your company as seen on your company's public profile.
*Department	The name of your department: Sales, Operations, Accounts Receivable, Treasury, or Other.
*Role	Your role within the department: • Sales: Sales Manager, Sales Associate, Proposal Manager, Other • Operations: E-Commerce Manager, Order Fulfillment/Inventory Management, Other • Accounts Receivable: Accounting Manager, Accounts Receivable Associate, Other • Treasury: Treasury Manager, Other • Other: Enter free text. **Tip:** If you select **Other** for **Department** and/or **Role**, the **User Specified Department** and/or **User Specified Role** fields are displayed for you to enter free text.
*Email	This field cannot be changed. If you want to change your email address, you have to create a different CSP account using the new email address. If you also want to use this email, create two company accounts and merge them. For more information, see Manage Merge Requests.
*Password	Use this field to create your password. It must be at least 8 characters long, and it has to include a number and a letter.
*Password Confirmation	This field needs to match the password you typed in the password field.

Note: If you join the CSP from one of two simultaneous invitations received from your administrator and your customer, you might see a green box with a question asking whether you are an employee of the supplier organization and you need to select either the **Yes – Join** or **No – Create New Account** checkbox.

Welcome message

Note: You can see this feature only if your customer(s) enabled it.

When you join the CSP from a customer-created invitation, you can see a registration page that is different from the page shown above. The **Create your business account** page contains the following welcome message and company logo by default. Your customer can customize the welcome message and add their logo, so the message might be different from the one shown below.



You need to enter your email address and password, and accept the Privacy Policy and the Terms of Use. You can get help to sign up or you can forward the invitation to others by clicking on the relevant links.

> **Tip:** You can update your information later on the **My Account Settings** page. For more information, see Manage Your Account.

By default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration. For more information, see Administer the CSP.

Forward your invitation

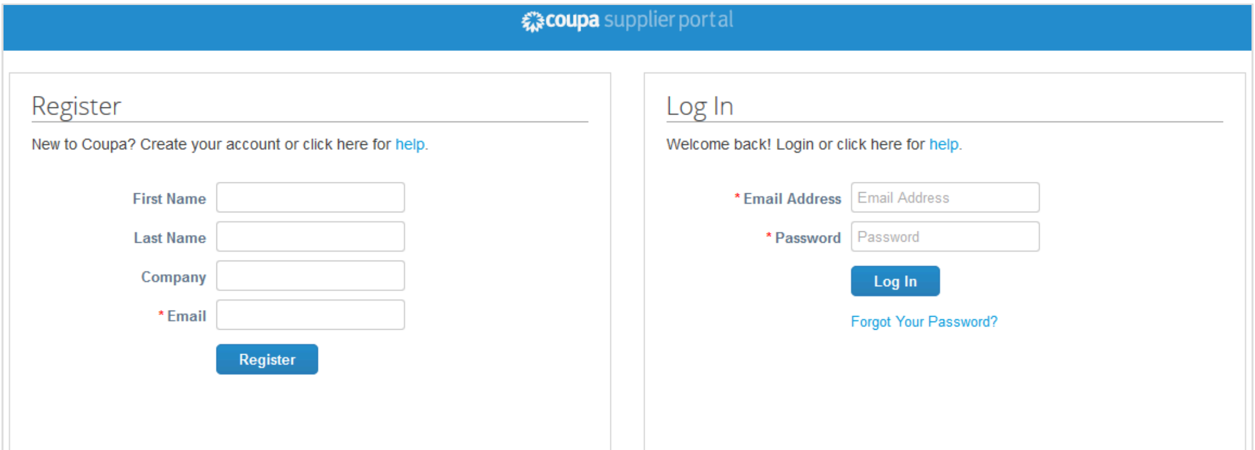
You can invite others any time by entering their email address in the **Forward email** field in the **Forward your invitation** section and clicking **Submit**, or by clicking on the **Forward this to someone** link if you see the welcome message.

For more information, see Register for the CSP.

Log in to the CSP

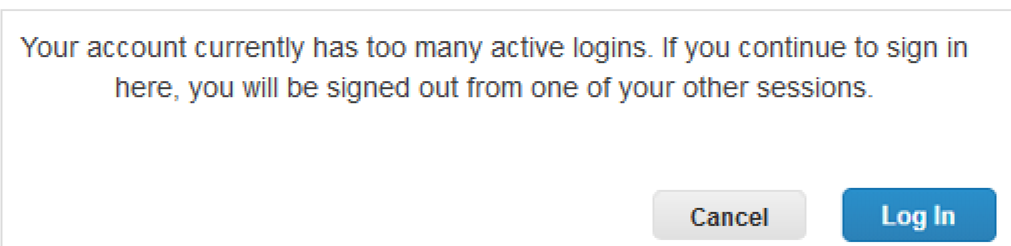
Login page

Go to supplier.coupahost.com and in the **Log In** pane on the right, enter your email address and password and click **Log In**.



Multiple active sessions

You cannot have more than three active sessions simultaneously. When you log in to another session, you are forced to close an open one. A message notifies you that you have too many active logins and you will be signed out from one of your other sessions if you click **Log In**. You can also **Cancel** the attempt to log in to another session.



Inactivity

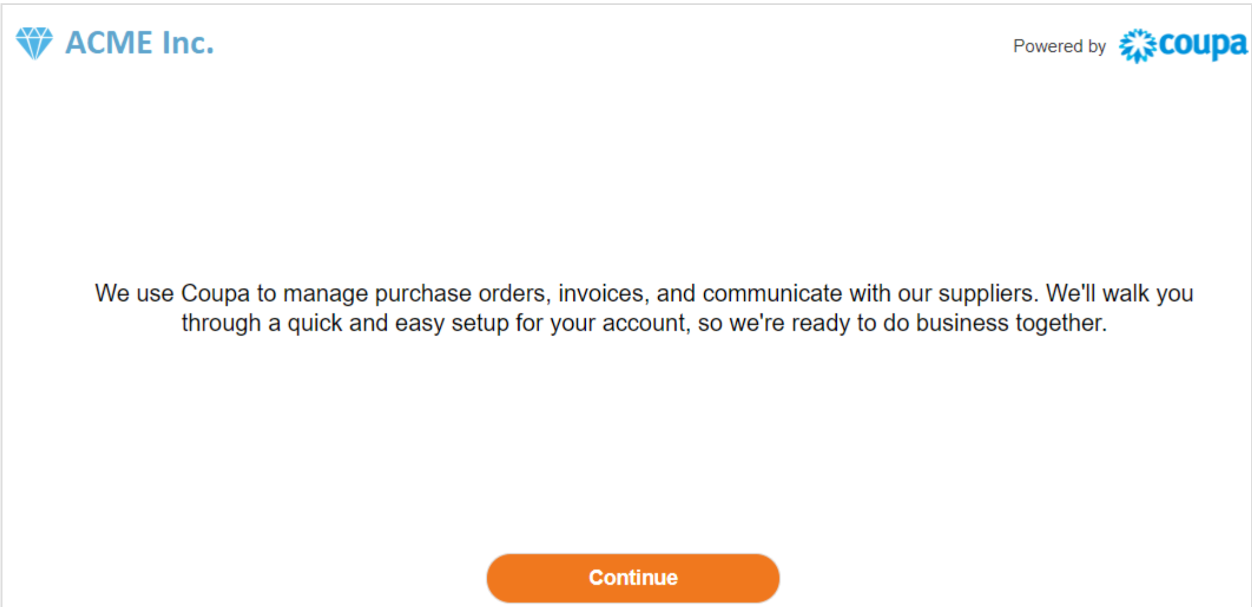
Your account is deactivated automatically if it is inactive for a defined period of time, that is, if:

- You have not logged in to the CSP for more than 90 days.
- You have not verified your account for 6 months.

When you try to log in as an inactive user, a red message bar notifies you of the verification email you received. To reactivate your account, you need to confirm that email. On the CSP login page, a green message bar informs you of the successful email verification and you can log in. For more information, see [Log in to the CSP](#).

Welcome message

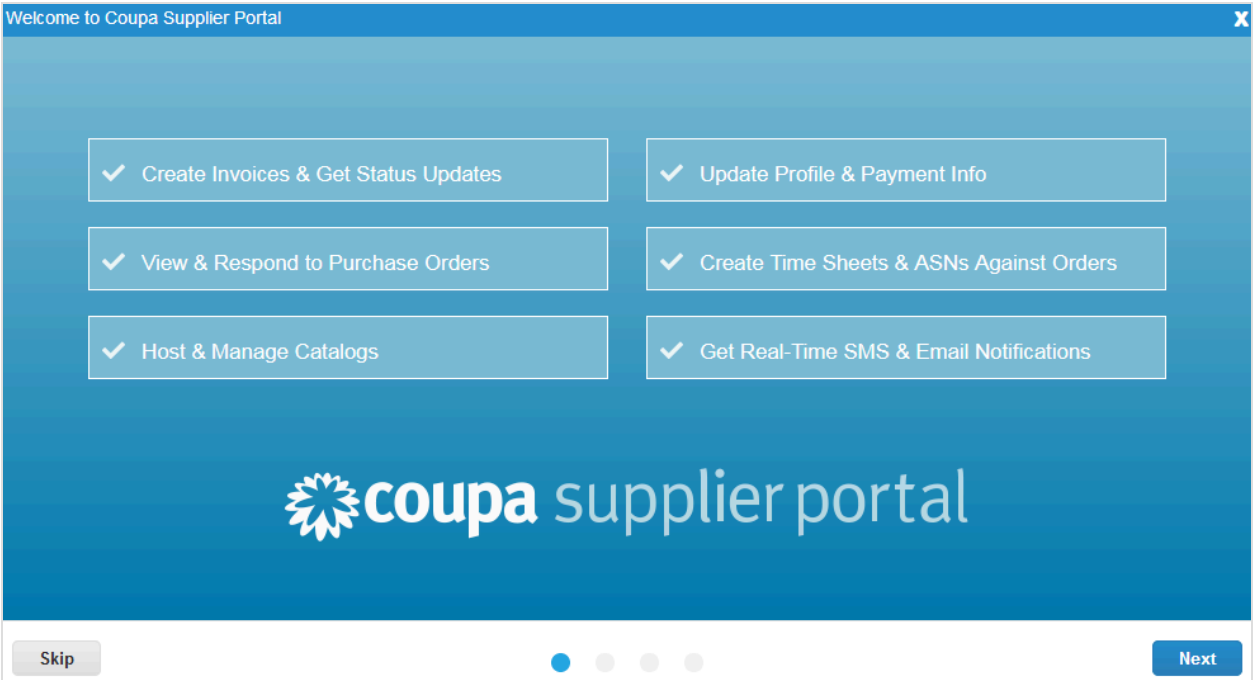
When you log in for the fist time from a new customer-created invitation, you can see the following welcome message and company logo by default. Your customer can customize the welcome message, so the message might be different and have your customer's logo instead of the Coupa logo.



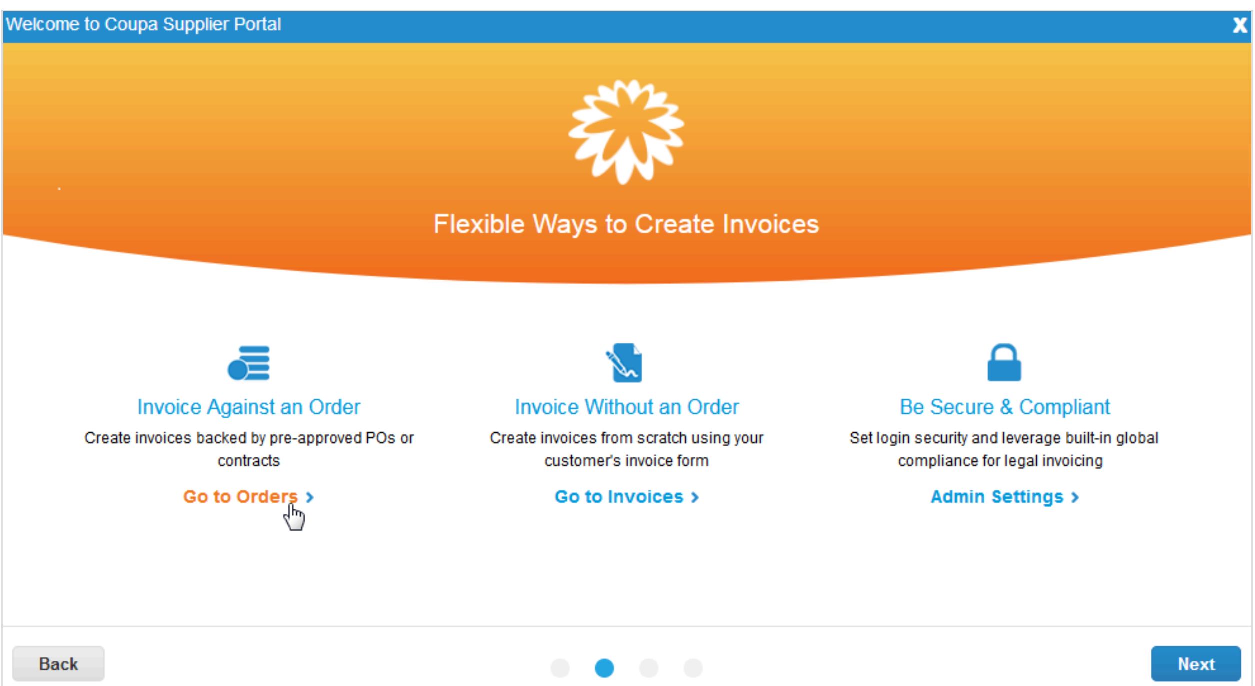
Welcome tour

Once you are signed in, Coupa takes you on a welcome tour.

> **Note:** If you log in from a new customer-created invitation, the welcome tour is not shown, but you can access it from the **Help** menu. For more information, see Navigate and Get Help.

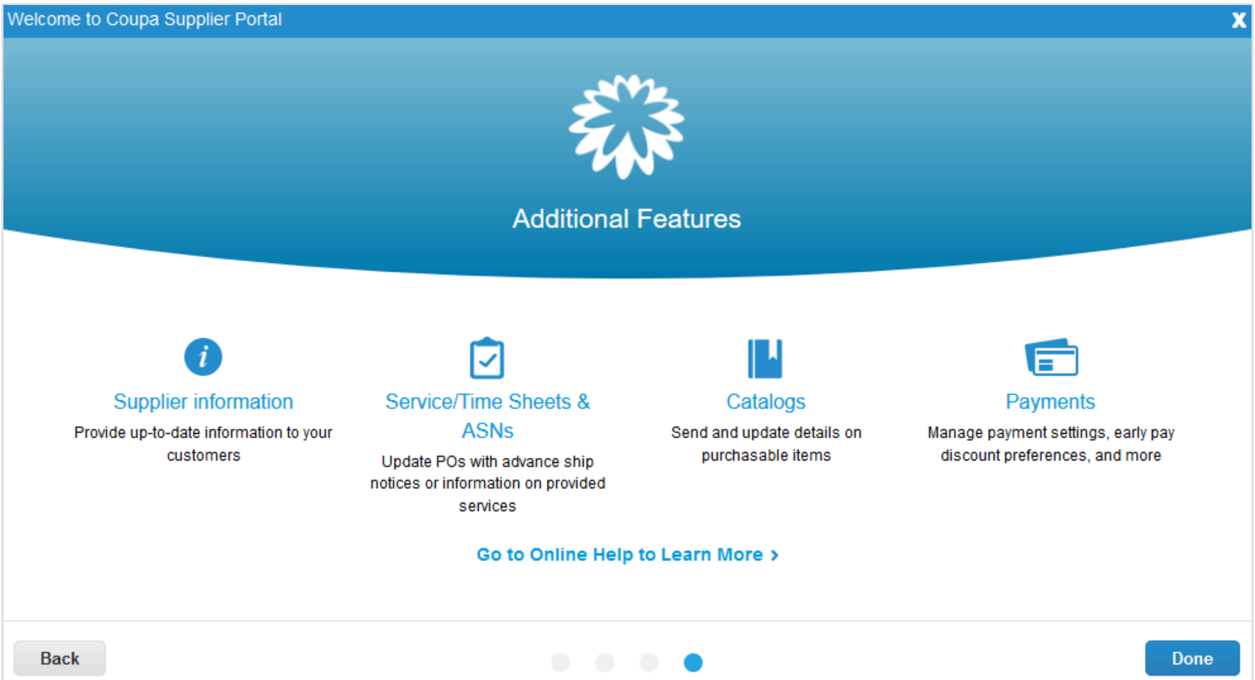


You can skip the tour by clicking on the **Skip** button or closing the window with the **X** in the top right corner. Clicking **Next** takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



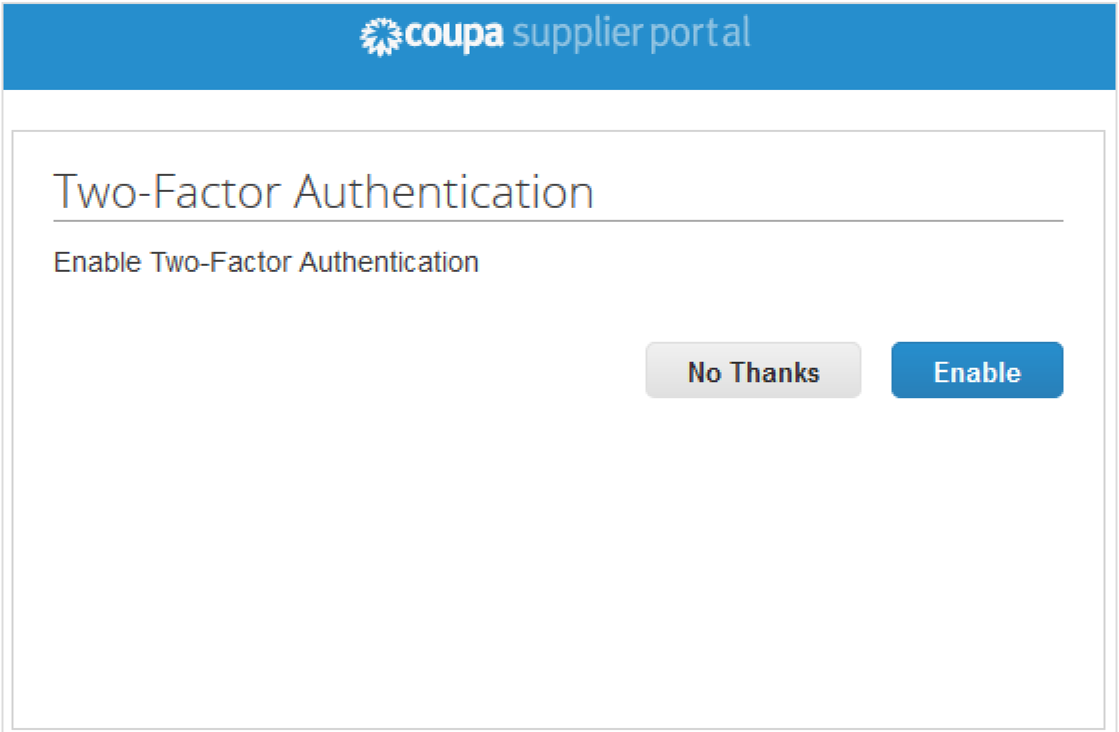
By clicking on the relevant link, you can go directly to view the **Orders**, **Invoices**, or **Admin** pages, or go to the next tour page that provides basic information about how the CSP can help you transact and communicate with your customers, for example, by allowing you to manage your catalogs, orders, and invoices, and setting notification preferences for important customer transactions.

The fourth (last) page of the tour summarizes the additional features, for example, the possibility to provide supplier information through the CSP, update POs with advance ship notice (ASN), update catalog items, and features for payments, such as, managing payment settings. If you click on the **Go to Online Help to Learn More** link, you are directed to the Coupa Supplier Portal Admin and User Guide for details on each feature.



Two-factor authentication

When you log in for the first time, you are prompted to enable two-factor authentication. For more information, see Enable or Disable Two-Factor Authentication.



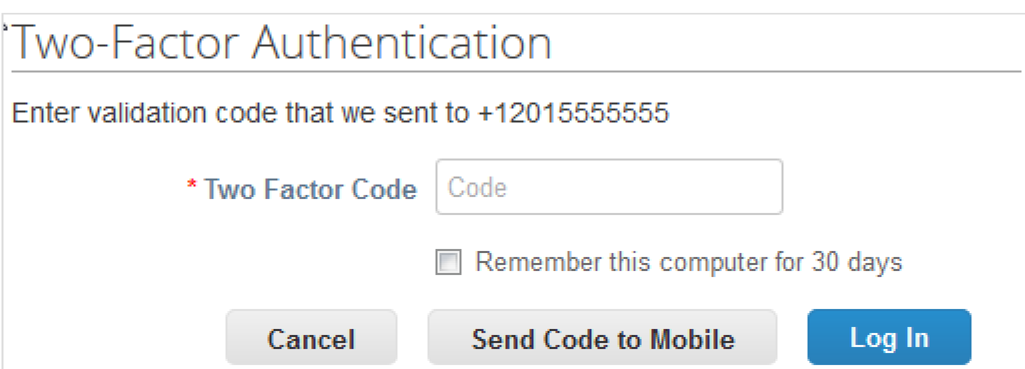
Note: Some customers may require you to use two-factor authentication when accessing their information.

Log in with two-factor authentication

If you have enabled two-factor authentication, the **Two-Factor Authentication** window opens when you want to log in to the CSP.

If you enabled the **Two-Factor Authenticator App**, choose open Google Authenticator on your device, choose your CSP account, and get the validation code.

If you enabled two-factor authentication for SMS, check your text messages to get the verification code.



Type the two-factor authentication code in the appropriate field, choose **Remember this computer for 30 days** if you are not using a shared or public computer, and click **Log In**.

> **Note:** The code is good only for 60 seconds. If you do not type that code on the CSP sign-in page and click **Log In** within 60 seconds, you have to get a new code and try again.

For more information, see Enable or Disable Two-Factor Authentication.

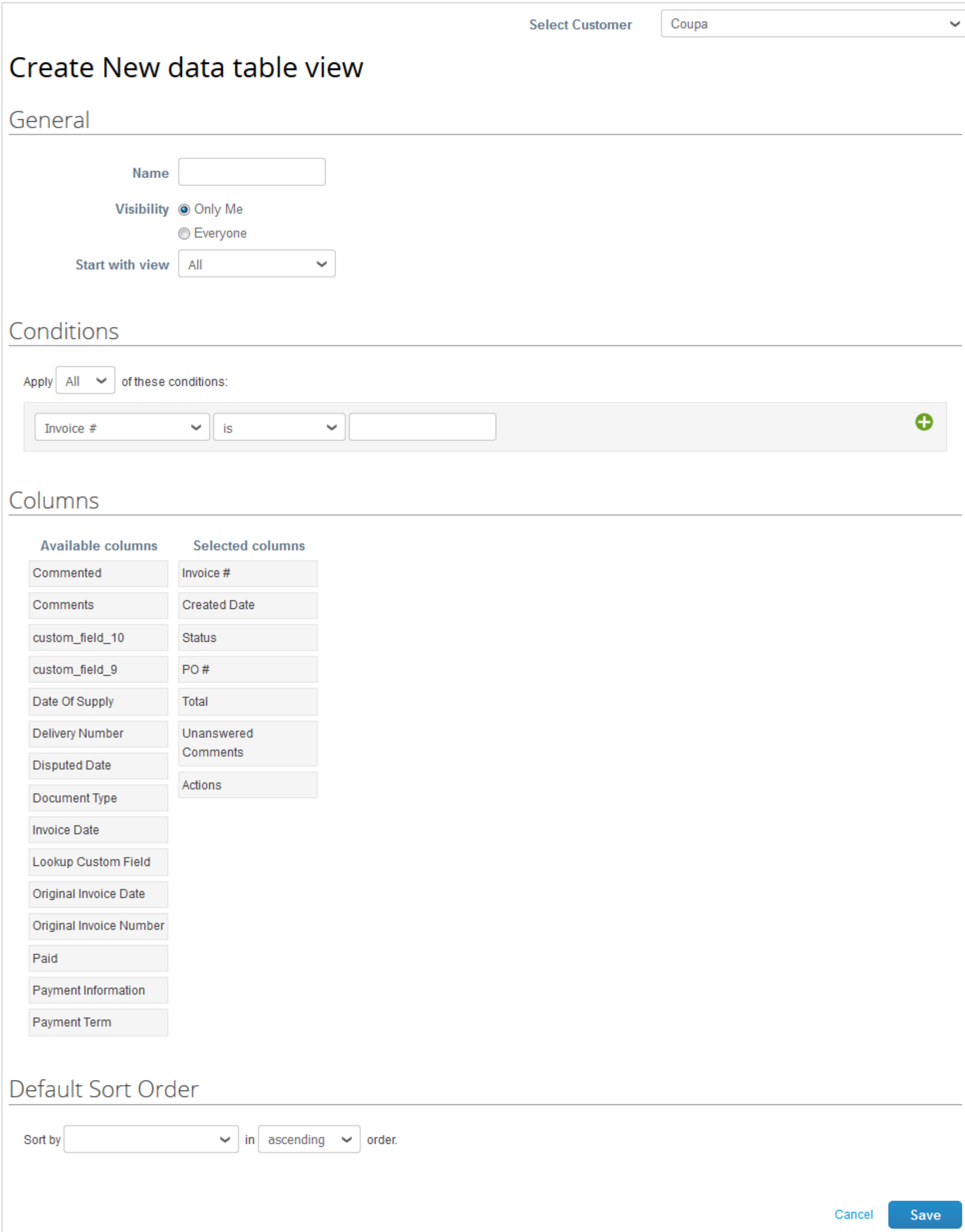
> **Note:** If you are locked out and you do not have your six-digit backup validation code, contact your customer who will ask for a declaration form and either your email used to log in to the CSP or a copy of your photo ID or passport to verify your identity.

Create Custom Views

You can create custom views for orders, order lines, order changes, order line changes, service/time sheets, service/time sheet lines, advance ship notices (ASN), invoices, catalogs, invoice payments, and PO payments.

With a custom view you can create a set of advanced search filters.

1. On the main menu, click on the tab for the function for which you want to create a custom view.
2. At the top of the table whose view you want to change, click **Create View** in the **View** drop-down list.
3. On the **Create New data table view** page, select the customer for whom you want to change the view settings, and then specify the settings you want to use for your custom view, including filtering conditions, columns to include, and sorting criteria.



If you want to build this view based on another view and modify those settings, use the **Start with view** option under the **General** settings.

You can use the following settings when creating or editing a custom view for a CSP table.

Group	Setting	Description
General	Name	Name of the custom view, visible from the **View** drop-down list at the top of the table.
	Visibility	Defines whether this view can be visible to only you or all the other users that can see the main table.
	Start with view	Use this option to load the settings from another view, and then modify those settings to fit your needs for this view.
Conditions	Apply	All - Displays results only for objects that meet all of the conditions you add in this list. Any - Displays results for objects that meet at least one of the conditions you add in this list.
	Conditions	Create conditions based on the data available in the CSP.
Columns	Available columns	This list depends on the table you work with in the CSP. You can select any of these columns to add to your custom view.
	Selected columns	These are all the columns displayed in this custom view. They appear from left to right, in the same order that you set them up here.
Default Sort Order	Choose the column by which you want results to be sorted and define whether to sort them in ascending or descending order.	

4. **Save** your settings.

To delete a custom view, open the view for editing by clicking on the **Edit View** () icon and click on the **Delete** () button at the bottom of the page.

Create or Update Your Profiles

In the CSP, you have a public profile and you can have specific profiles for your customers that you are connected with through the CSP.

You can view and update your public and customer-specific profiles from the **Home** page or the **Profile** page.

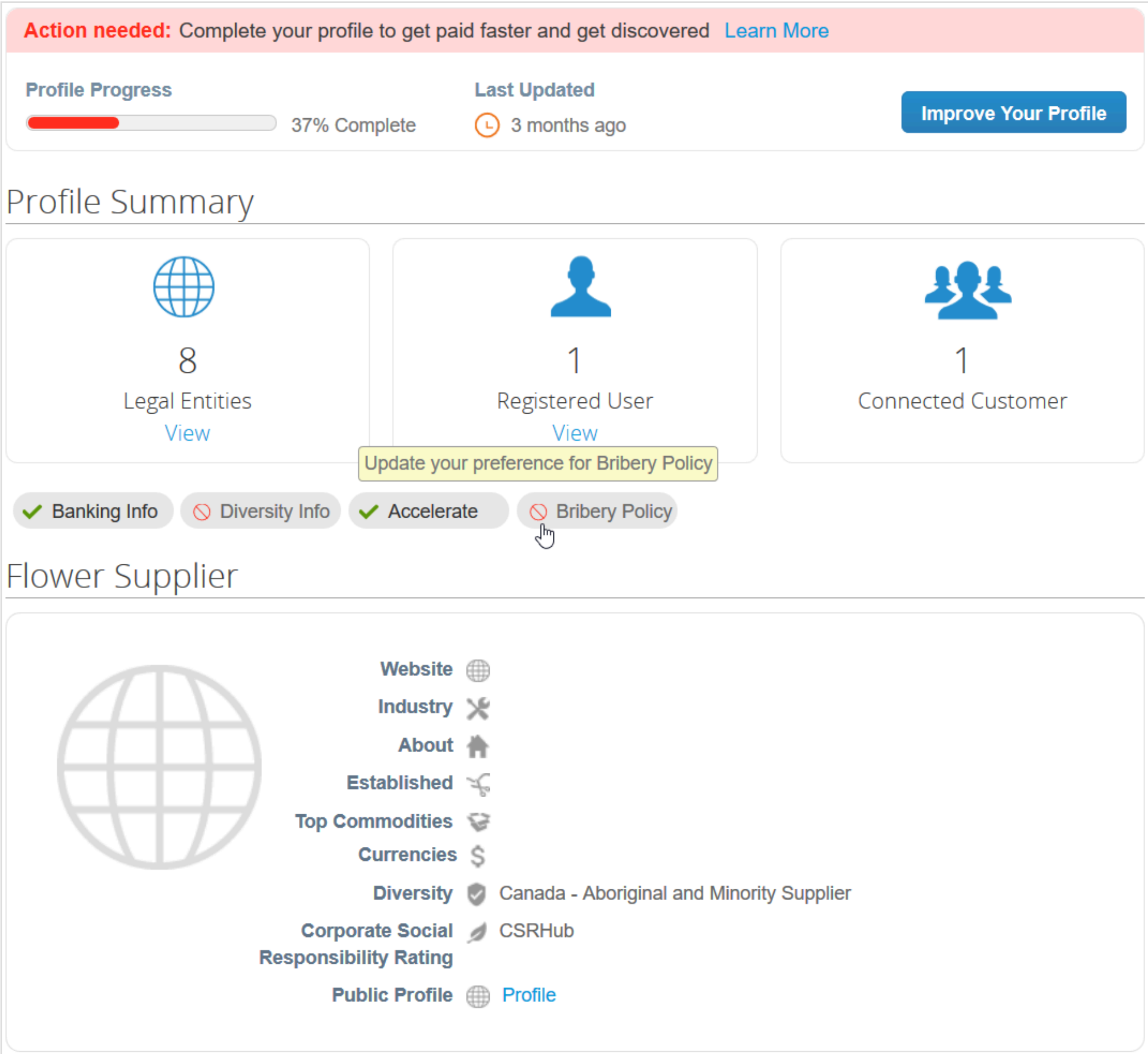
> **Tip:** When you register or log in to the CSP to do business with a customer that uses an onboarding flow, you are guided through the process of providing the customer with the necessary information. For more information, see Update your customer profile.

> **Note:** Some sections are labeled as private and cannot be seen from the CSP. Financial information (for example, your tax ID, DUNS, and remit-to addresses) are considered private information. This information appears only on documents that you create through the CSP, for example, on invoices.

Update your public profile

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).



Profile progress

At the top of the **Home** page, you can see your profile progress/completeness.

The following table shows the profile completeness stages.

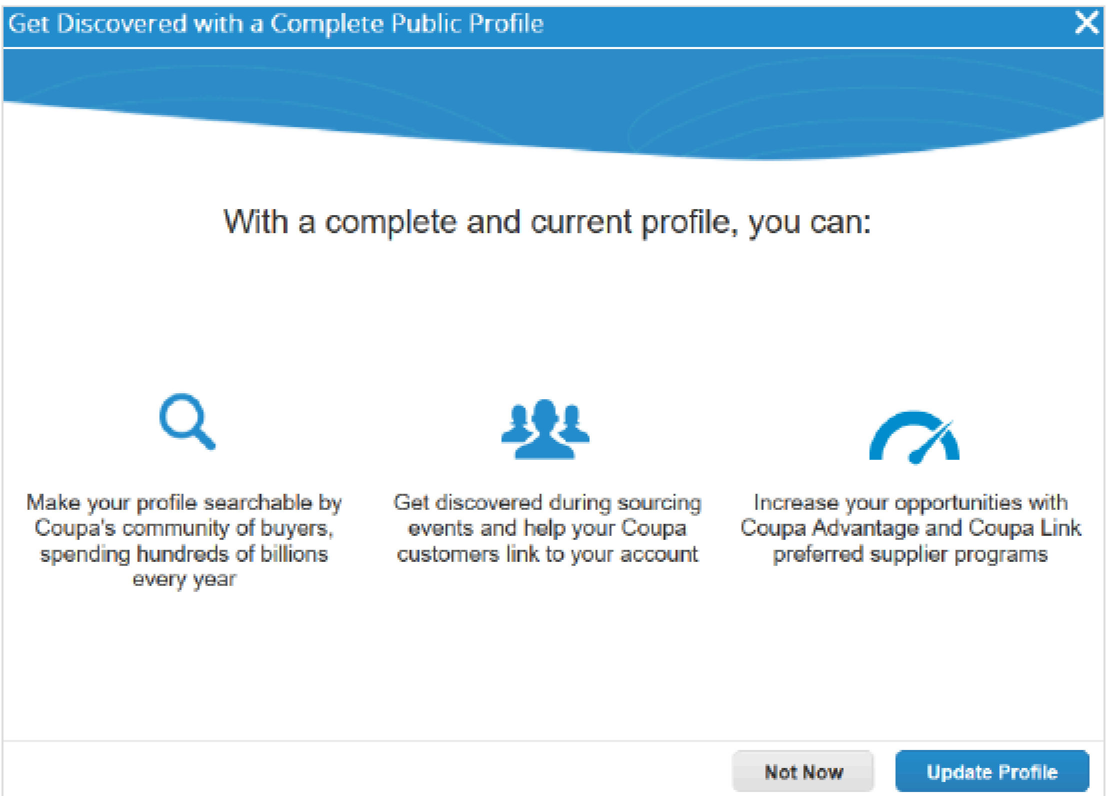
Profile Progress Bar Color	Message
Red	**Action needed:** Complete your profile to get paid faster and get discovered.
Blue	**Recommended:** Complete your profile to get paid faster and get discovered.
Green	**Great job!** A complete profile helps you get paid faster and get discovered.

Next to the progress bar, the **Last Updated** field shows how long ago the profile was updated, for example, 2 minutes ago or 10 days ago.

The following table shows the color of the progress bar depending on the age of the profile.

Percentage of Completeness	Last Updated < 1 Year Ago	Last Updated 1-2 Years Ago	Last Updated > 2 Years Ago
< 50%	Red	Red	Red
50% - 80%	Blue	Blue	Red
80% - 100%	Green	Blue	Red

The **Learn More** link next to the profile progress message opens the **Get Discovered with a Complete Public Profile** popup with tips and information on the benefits of a complete public profile.



Clicking **Update Profile** opens your public profile for editing.

Profile summary

Under the section about your profile progress, you can see an actionable profile summary, which shows the number of legal entities and registered users based on the information provided in your profile, and the number of connected users, that is, the number of customers linked to your profile.

Clicking on the **View** link under **Legal Entities** takes you to the **Admin / Legal Entity Setup** page where you can add, update, or deactivate legal entities.

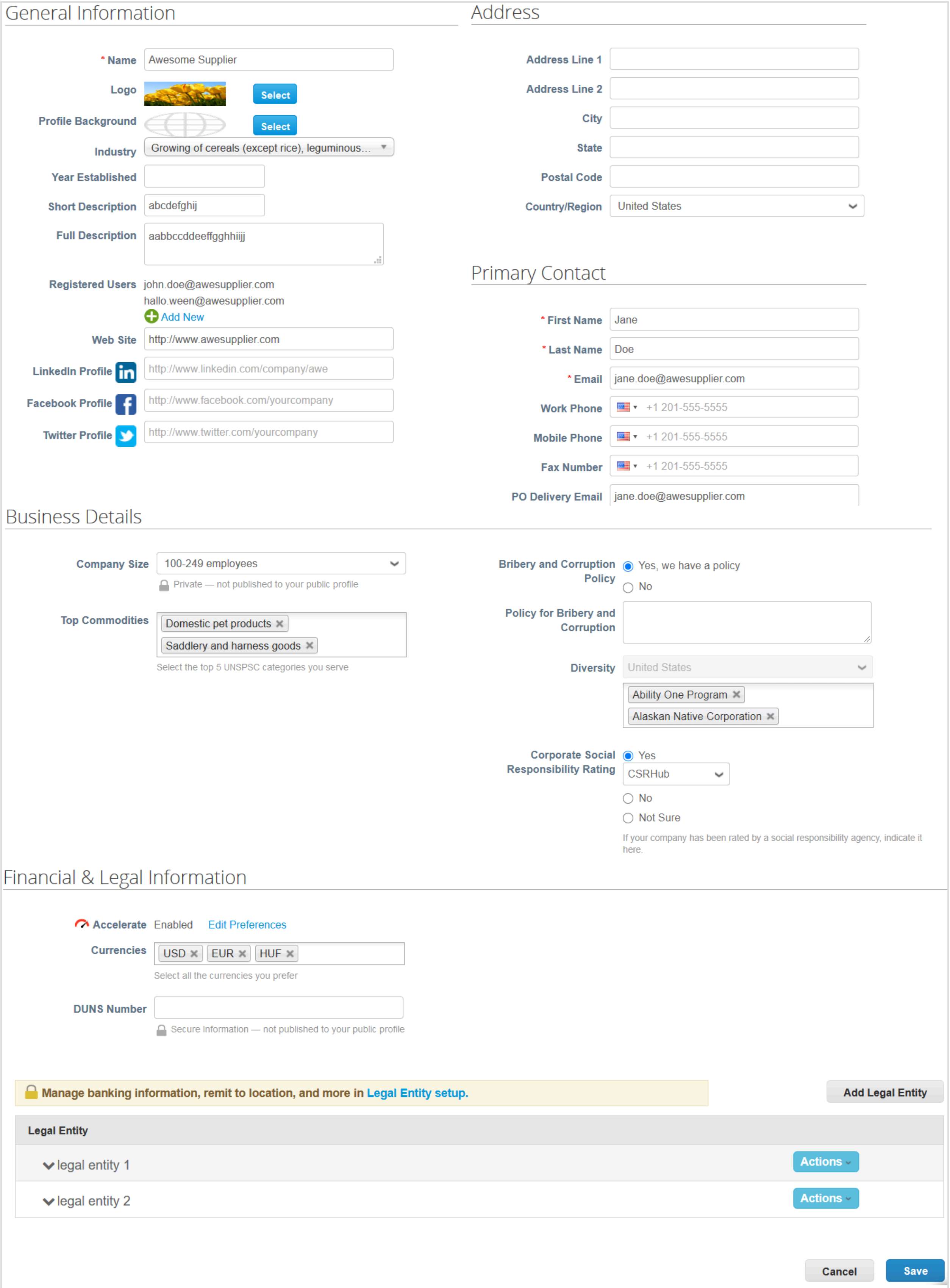
Clicking on the **View** link under **Registered Users** directs you to the **Admin / Users** page where you can invite new or manage existing users.

The profile summary also indicates if you have ( ) or have not ( ) provided banking and diversity information, if you accelerate orders/invoices, and if you have a bribery policy.

Profile information

To improve your progress by updating your profile, click on the:

- **Improve Your Profile** button on the **Home** page next to the section about your profile progress.
- **Update Profile** button in the **Get Discovered with a Complete Public Profile** popup.
- **Edit Profile** button on the **Profile** page after selecting **Public Profile** from the drop-down list.


General Information
* Name
Awesome Supplier
Logo
Select
Profile Background
Select
Industry
Growing of cereals (except rice), leguminous...
Year Established
Short Description
abcdefghij
Full Description
aabbccddeeffgghhiijj
Registered Users
john.doe@awesupplier.com
hallo.ween@awesupplier.com
Add New
Web Site
http://www.awesupplier.com
LinkedIn Profile
http://www.linkedin.com/company/awe
Facebook Profile
http://www.facebook.com/yourcompany
Twitter Profile
http://www.twitter.com/yourcompany
Address
Address Line 1
Address Line 2
City
State
Postal Code
Country/Region
United States
Primary Contact
* First Name
Jane
* Last Name
Doe
* Email
jane.doe@awesupplier.com
Work Phone
+1 201-555-5555
Mobile Phone
+1 201-555-5555
Fax Number
+1 201-555-5555
PO Delivery Email
jane.doe@awesupplier.com
Business Details
Company Size
100-249 employees
Private — not published to your public profile
Top Commodities
Domestic pet products
Saddlery and harness goods
Select the top 5 UNSPSC categories you serve
Bribery and Corruption Policy
Yes, we have a policy
No
Policy for Bribery and Corruption
Diversity
United States
Ability One Program
Alaskan Native Corporation
Corporate Social Responsibility Rating
Yes
CSRHub
No
Not Sure
If your company has been rated by a social responsibility agency, indicate it here.
Financial & Legal Information
Accelerate
Enabled
Edit Preferences
Currencies
USD
EUR
HUF
Select all the currencies you prefer
DUNS Number
Secure information — not published to your public profile
Manage banking information, remit to location, and more in Legal Entity setup.
Add Legal Entity
Legal Entity
legal entity 1
Actions
legal entity 2
Actions
Cancel
Save

Fill in the following fields:

Setting	Description
General Information	
*Name	Your company's name.
Logo	Select an image to upload as your company's logo.
Profile Background	Select an image to upload as the profile background.
Industry	Select your industry from the drop-down list.
Year Established	Enter the year when your company was established.
Short Description	Add a short description of your company.
Full Description	Add a full description of your company.
Registered Users	Add registered users by inviting them. For more information, see Manage Users.
Website	Enter your company's website.
LinkedIn Profile, Facebook Profile, Twitter Profile	Enter the relevant link(s) to your company's social media profile(s).
Address	
Address Lines 1 and 2, City, State, Postal Code, Country/ Region	Enter your company's address.
Primary Contact	
*First Name, *Last Name, *Email	Enter the name and email address of your company's primary contact.
Work Phone, Mobile Phone, Fax Number	Enter the relevant phone number(s).
PO Delivery Email	Enter the email address where you want to receive your customers' purchase orders.
Business Details	
Company Size	Select a range from the drop-down list to show the size of your company. Available options: self-employed, 2-9, 10-49, 50-99, 100-249, 250-499, 500-999, 1000-5000, and 5000+ employees. This is private information and not published to your public profile.
Top Commodities	Select your top five UNSPSC Level 2 (Family) categories from the drop-down.
Bribery and Corruption Policy	Select the relevant radio button: • Yes, we have a policy • No
Policy for Bribery and Corruption	If you selected Yes, type in or copy and paste your policy.

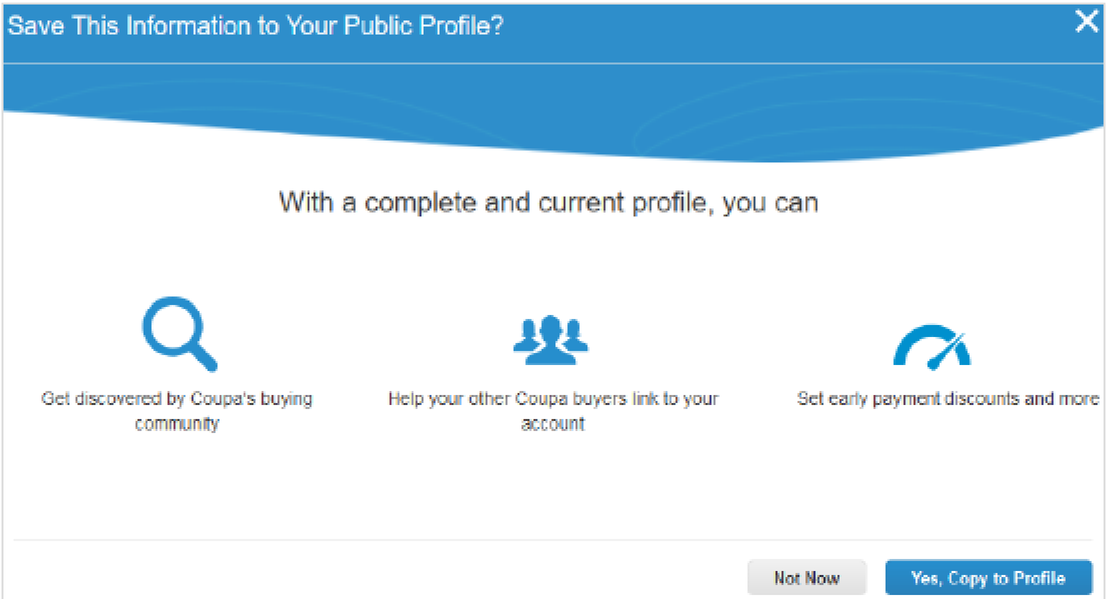
Diversity	Select a country/region along with a diversity type from the drop-down lists to indicate if your business has a diversity ownership. Available options: • United States • Outside of the US • None
Corporate Social Responsibility Rating	Select a rating agency if applicable. Available options: • CSRHub • MSCI Inc. • Truvalue Labs • EcoVadis • Scope 5 • EnergyStar • Inoxico (South Africa) • D&B • LexisNexis • Workato • Ecodesk Horizon • RBA • IntegrityNext • WBCSD's • GreenSeal • GFSI • Other
Financial and Legal Information	
Accelerate	Indicates if Coupa Static Discounting is enabled or disabled. Click on the **Edit Preferences** link to modify your early payment discount preferences. For more information, see Set Coupa Static Discounting Preferences.
Currencies	Select all the currencies that you prefer.
DUNS Number	Enter your Data Universal Numbering System (DUNS) number. This is secure information and is not published to your public profile.
Legal Entity subsection	Lists all your existing legal entities allowing you to manage them or add new ones directly from this page. If you have three or more legal entities, they are collapsed. To view their details, click on the Down arrows. Clicking on the **Add Legal Entity** button directs you to the **Legal Entity Setup** page. For more information, see Set up Legal Entities.

Reuse your customer-specific profile information in your public profile

When you receive a supplier information form request from your customer to create or update your profile, you can copy/ save the provided information to your CSP public profile. After submitting your supplier information for approval, click

Yes, Copy to Profile in the appearing popup window.

> **Note:** Your existing CSP profile data is overwritten with the data you provided in the supplier information form only when you save the form.



You are directed to the **Public Profile** edit page where the following fields are automatically populated (and highlighted in yellow) based on the provided information: Name, Industry, Full Description, Website, Bribery and Corruption Policy, Address (all fields), Primary Contact (all fields), PO Delivery Email, and DUNS number. Save your profile to confirm the updates.

Update and reuse your public profile information in your customer-specific profile

Keep your information accurate and up to date for each of your customers.

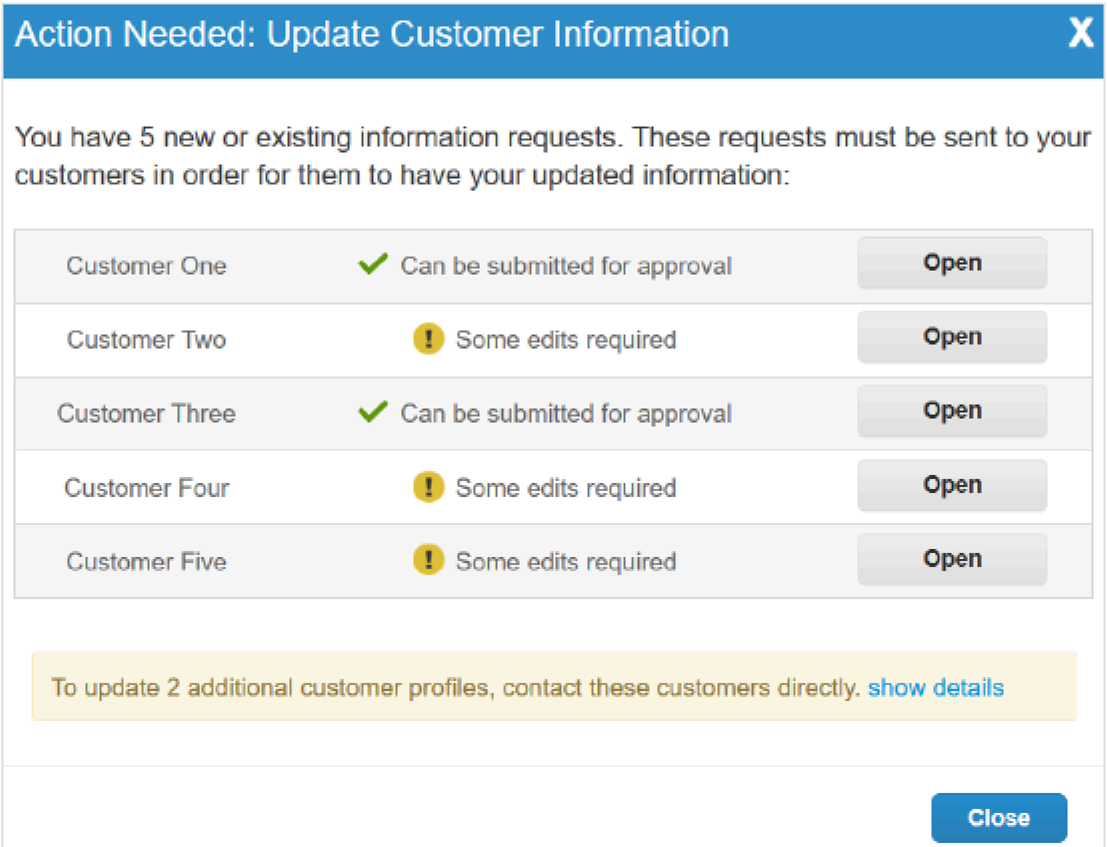
> **Note:** Depending on your customers' settings, your customer-specific profile changes may update the information that your customers have.

To update your customer-specific profiles, go to **Profile > Your Customer Profiles**. To manage a specific profile, select the customer name from the **Profile** drop-down list. If you do not see the customer you are looking for, it means that you are not connected to them yet. You cannot see them in the **Select Customer** drop-down list on the **Orders**, **Service/ Time Sheets**, **ASN**, **Invoices**, **Catalogs**, and **Payments** pages either.

If any of your customers uses a supplier information form, and you update information in your CSP public profile, you are prompted to update your customer profile if you have any supplier information form requests. You can update your profile also for customers that do not use a supplier information form by requesting help from those customers' supplier account owners.

After editing and saving your public profile, you can see a green banner notifying you about your profile update status, for example: "Your company info was successfully updated on your Public Profile and 2 customer profiles."

Depending on whether your customer profile is for a customer using supplier information forms or not, you can also see popups with various information and instructions.



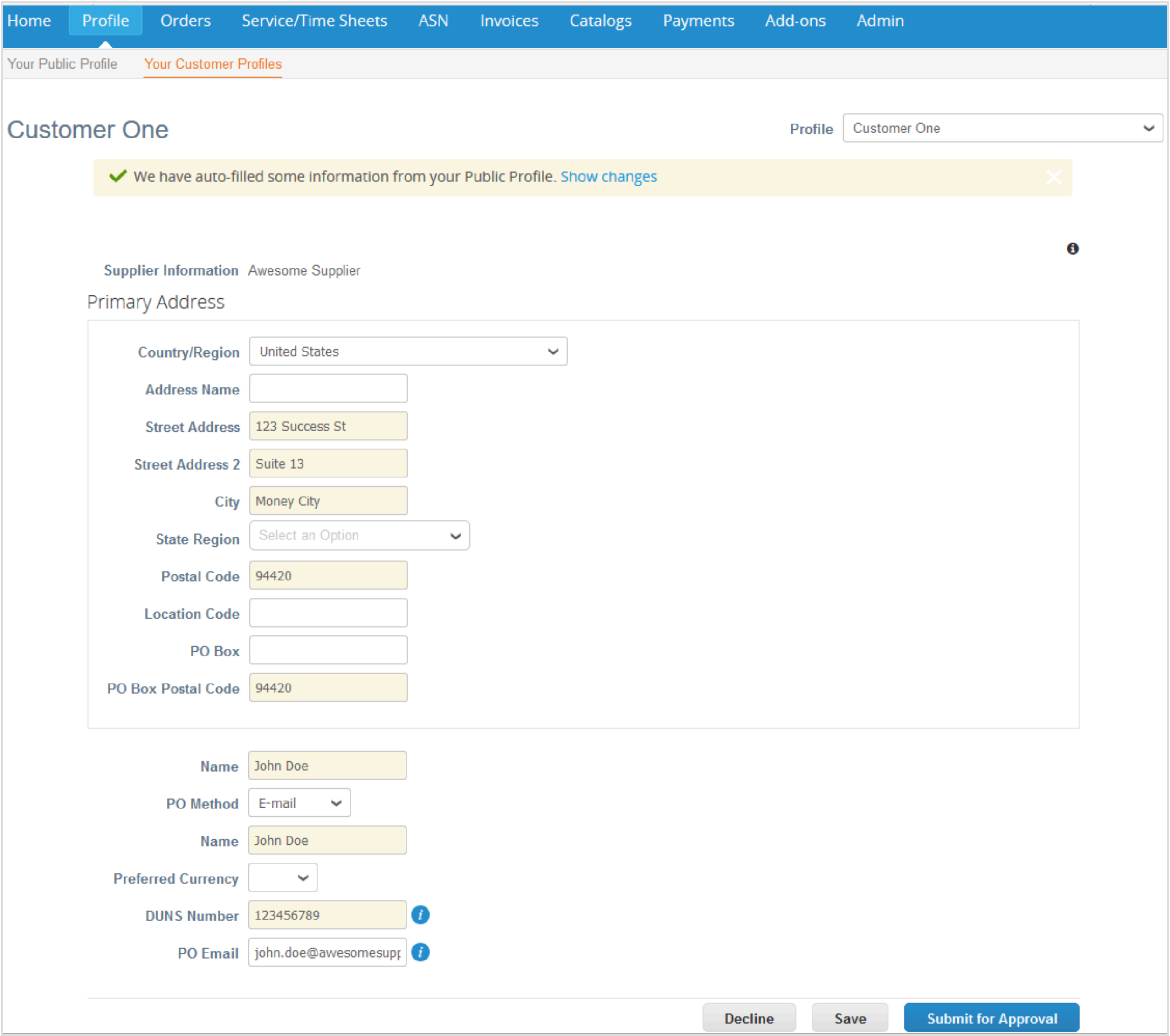
Customer profile update with supplier information form

The popups depend on the following scenarios:

- One or multiple supplier information customer profiles that are new/blank (not filled out) or saved (filled out and saved).
- One or multiple supplier information customer profiles that are filled out and submitted for approval, or approved and applied.

In the **Action Needed: Update Customer Information** popup, you are informed if you need to edit a specific form and provide more information (due to the differences between the public profile fields and the customizable customer profile fields), or if you can submit the form for approval as is.

Click on the **Open** button to open your customer profile for editing with fields (highlighted in yellow) pre-populated based on your public profile.



Tip: You can see this page also for other customers using supplier information forms if you select them from the **Profile** dropdown.

Add the missing information and submit your form for approval.

Note: If you make changes, you are asked if you want to save the new information to your public profile. For more information, see Reuse your customer-specific profile information in your public profile.

Tip: Click on the **Show changes** link to see the information that populated the fields before they were updated with information from your pubic profile.

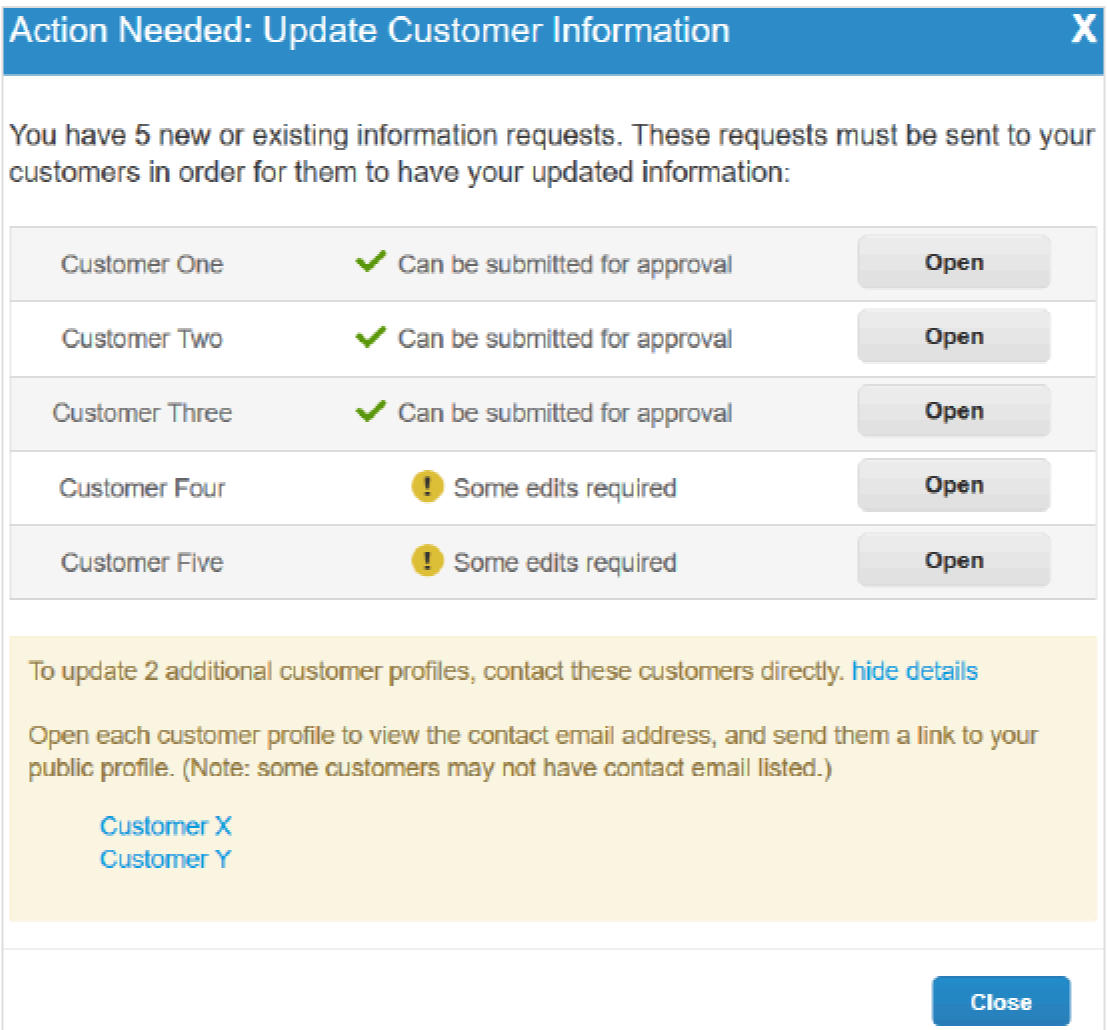
If you try to submit your form for approval before it is approved, you are informed in a red banner that it is pending approval. To update your profile, you need to withdraw the request and resubmit your changes.

> **Tip:** If you close the popup, you can open it any time from your **Notifications** by clicking on the **Update information requests** notification. For more information, see View and Manage Notifications.

Customer profile update without supplier information form

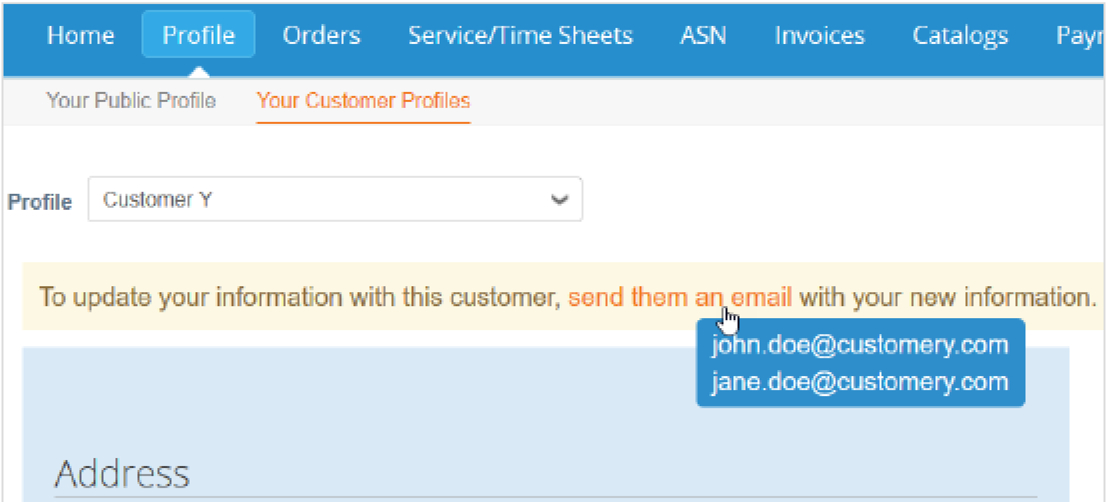
In the **Action Needed: Update Customer Information** popup, in the yellow banner, you are informed that you need to contact one or more customers directly to update your customer profiles for them.

Click on the **show details** link to see the names of customers that you need to contact. Clicking on a name allows you to email directly to the customer's supplier account owner who can help you with updating your profile.



If you select a customer from the **Profile** dropdown on **Your Customer Profiles** page, you can see a yellow banner with instructions depending on whether your customer provided one, more, or no supplier account owners.

If the customer provided supplier owner contact information, you can email them directly by clicking on the email address (one contact email) or on the **send them an email** link (more email addresses).



> **Note:** If your customer did not provide a supplier owner contact (email), you cannot contact them from this popup. You need to contact them through the same channel(s) as before.

If your customer does not use a supplier information form, depending on their settings, you might be able to see the **Edit** button and edit your customer profile.

Update your customer profile

When you register or log in to the CSP to do business with a customer that uses an onboarding flow, you are guided through the following elements of the flow to provide your customer with the necessary information: welcome message, basics, payment, and profile.

> **Note:** Some elements of the onboarding flow, for example, fields for invoicing setup and bank information for payment, are available only if you are based in the US, that is, your selected country/region is the United States. If you are not a US-based supplier, only the basics and profile elements, and the payment discount preferences settings are available.
>
> You can provide this data when setting up legal entities after onboarding.

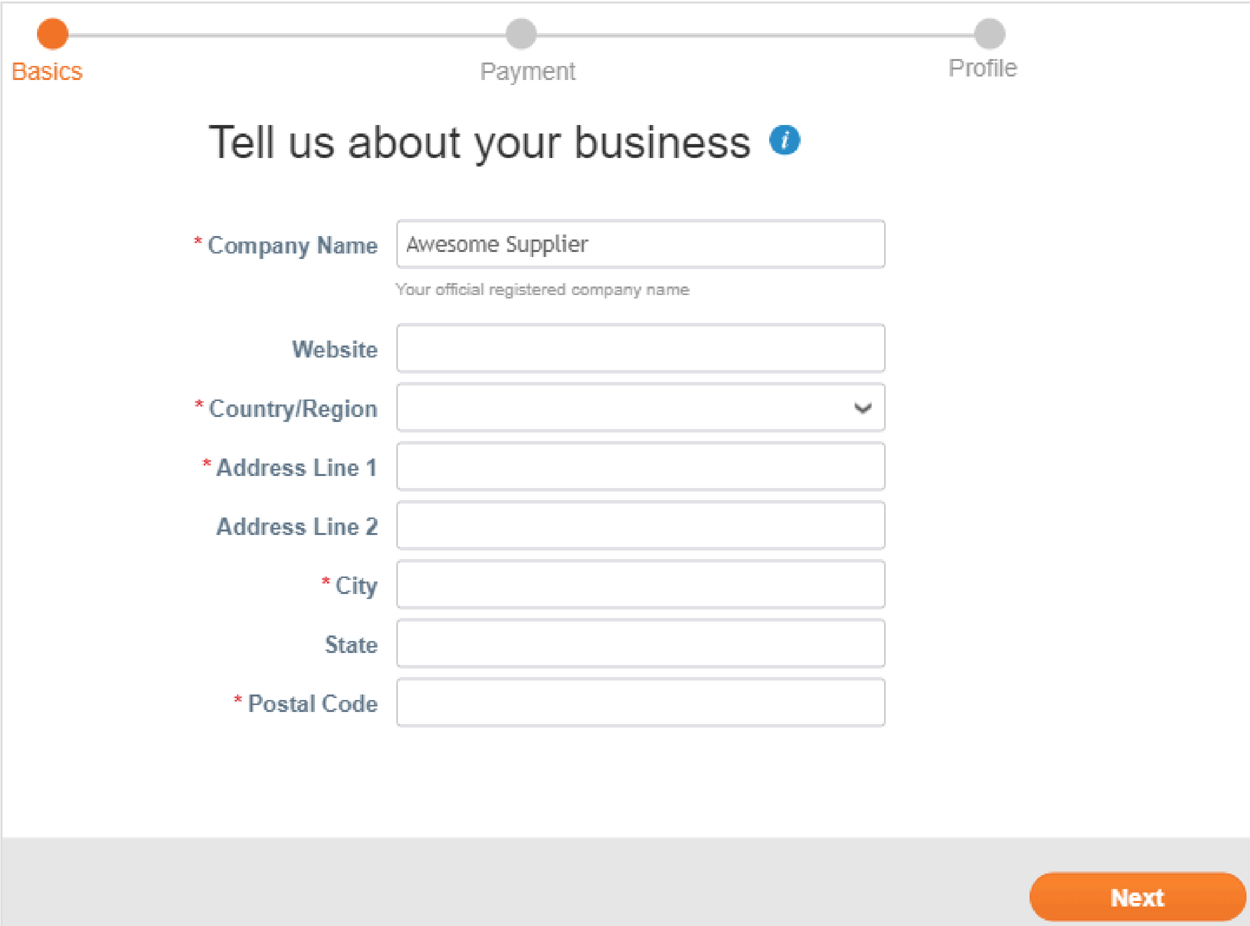
Welcome message

For more information, see Create Your Account and Log in to the CSP.

Basics

Clicking on the **Get Started** or **Continue** button takes you to the **Tell us about your business** page where you can provide your basic information.

Note: Providing your address is required.



Tip: Click on the Info ( ) icon to learn more about the fields.

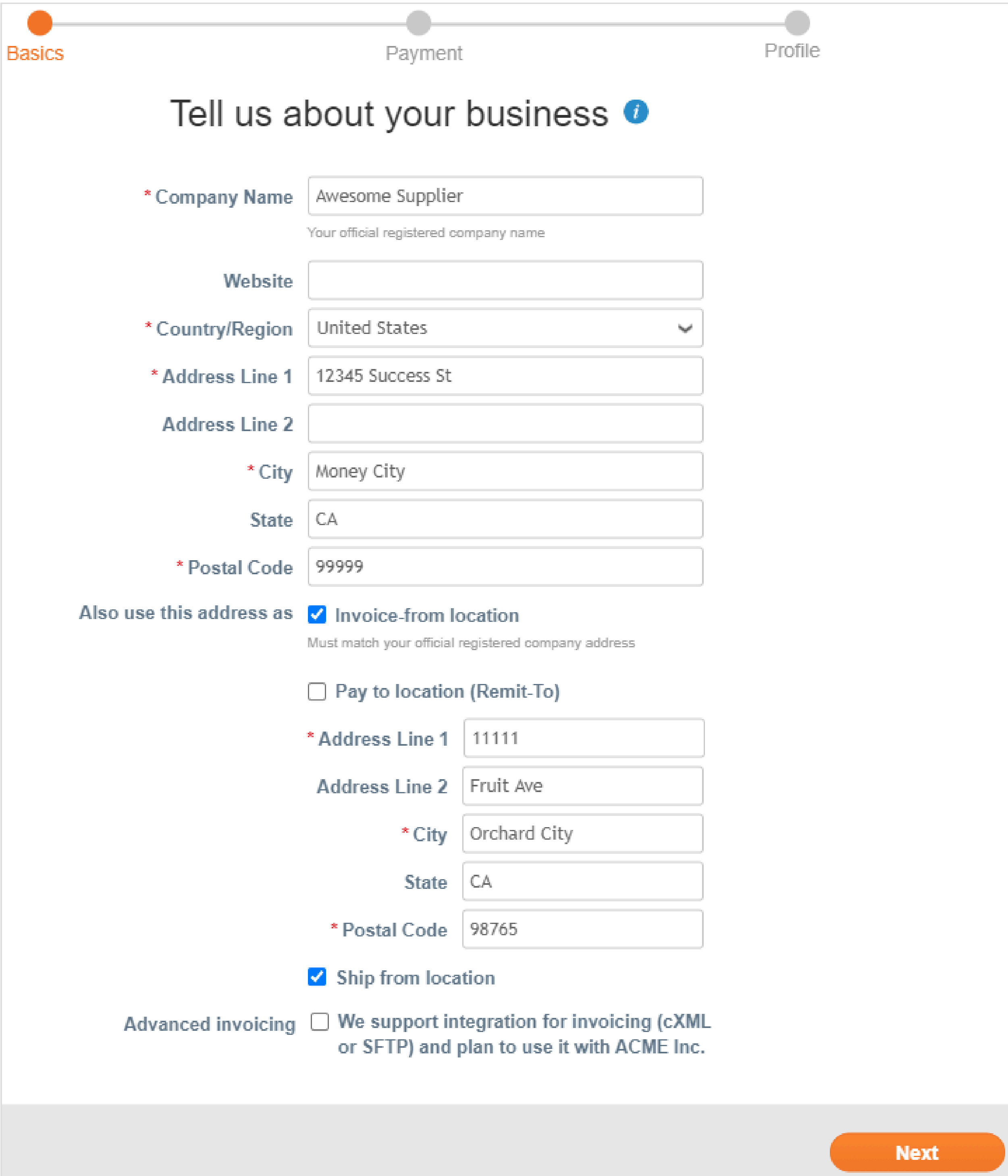
Fill in the following fields: **Company Name** (registered company name to be displayed on your invoices), **Website**, **Country/Region**, **Address Lines 1-2**, **City**, **State**, and **Postal Code**.

Note: Name and address fields are pre-populated if your customer already has the information from you in their supplier record, or if you are already registered to the CSP to transact with other customers and provided the information in your profile. You can also choose to update these fields.

Mandatory fields are marked with a red asterisk (*).

If you are not a US-based supplier, at the bottom of the page you are informed that you are **All set for now. On your first invoice with <customer name> , we will guide you through your legal entity setup**.

If you are a US-based supplier, after providing your address, you also have the option to set up a legal entity. You can **Also use this address as**: **Invoice from location**, **Pay to location (Remit-To)**, and/or **Ship from location** by leaving the relevant checkbox(es) selected. Or, if you want to provide a different address for invoicing, payment, and/or shipping, deselect the relevant checkbox(es) and enter the new address.



- Invoice from location is the main address of your registered business or the registered entity you will be invoicing your customer from.

- Pay to location is the address your customer will use to send your payment; remittance address.
- Ship from location is usually your warehouse location.

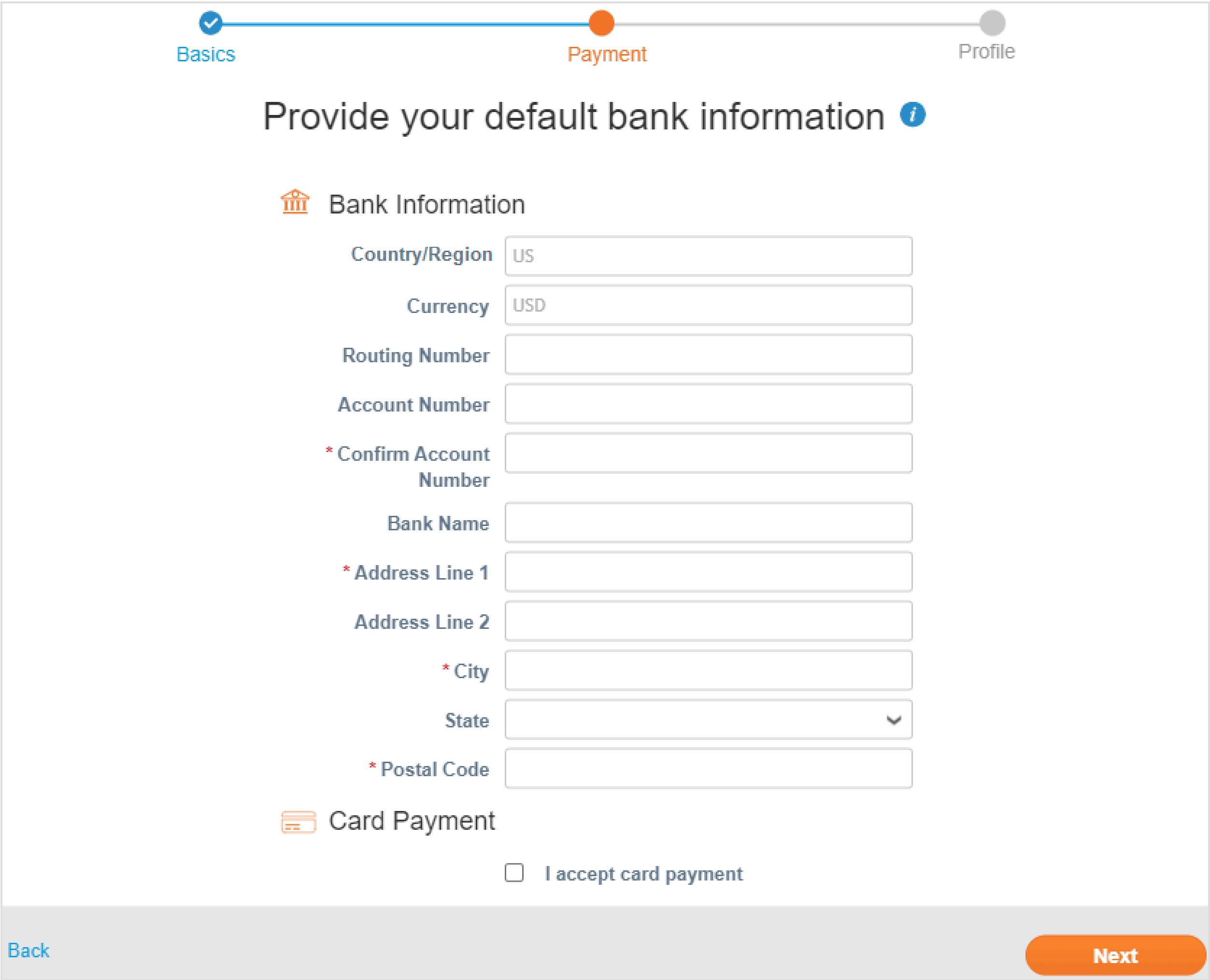
Also, the **Advanced Invoicing** checkbox allows you to indicate if you support integration for invoicing (cXML or SFTP) and plan to use it with your customer.

> **Tip:** If you are already registered to the CSP and you set up a legal entity earlier, you can also see the **Use my current legal entity** drop-down from which you can select your existing legal entity to provide it to your new customer.

Payment

Clicking on the **Next** button takes you to the **Provide your default bank information** page where you can provide your payment information.

> **Note:** You can see the page for bank information only if your customer uses Coupa Pay. Providing your bank information is required.



Fill in the following **Bank Information** fields: **Country/Region** (defaulted), **Currency** (defaulted), **Routing Number**, **Account Number**, **Confirm Account Number**, **Bank Name**, **Address Lines 1-2**, **City**, **State**, and **Postal Code**. The address that you entered when providing your basic information is also linked to this payment account.

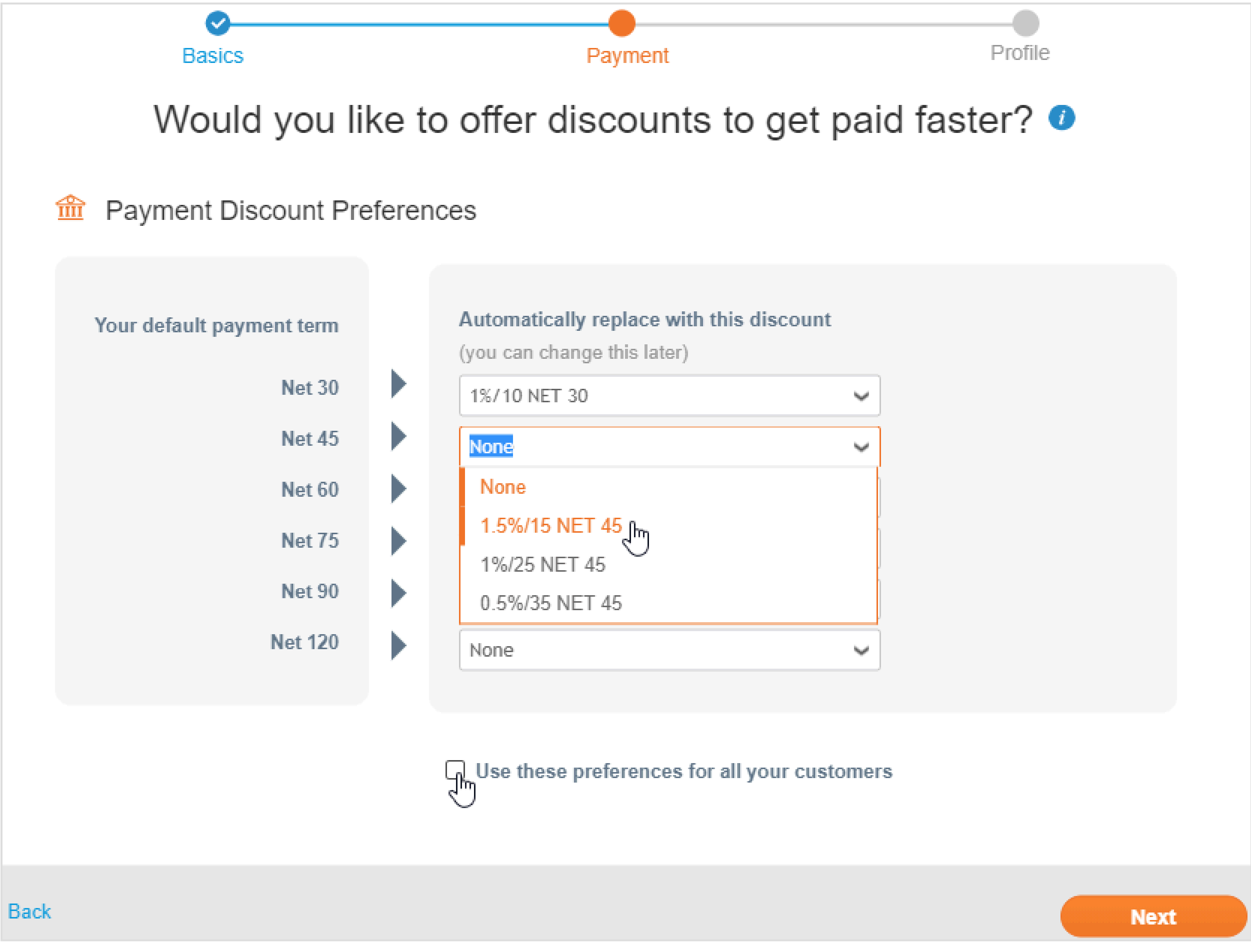
Mandatory fields are marked with a red asterisk (*).

Indicate if you accept card payment by selecting the checkbox under **Card Payment**. If you accept card payment, you need to specify the email address where you want to receive the card.

> **Tip:** If you selected a legal entity that contains US banking information, at the top of the page you can see the **Payment Address** section to select the address from the **Remit-To** drop-down to pre-populate the bank information fields for your new customer, instead of providing new bank information.

Clicking on the **Next** button takes you to the **Would you like to offer discounts to get paid faster?** page where you can set your **Payment Discount Preferences** (static discounting, formerly: Coupa Accelerate preferences). These preferences are automatically applied to all your invoices with the customer.

Note: Providing your payment discount preferences is optional. The selected payment terms can be used only with your Coupa Pay customer(s).



On the left you can see your default payment term(s), and on the right, you can select new terms to automatically replace the existing ones.

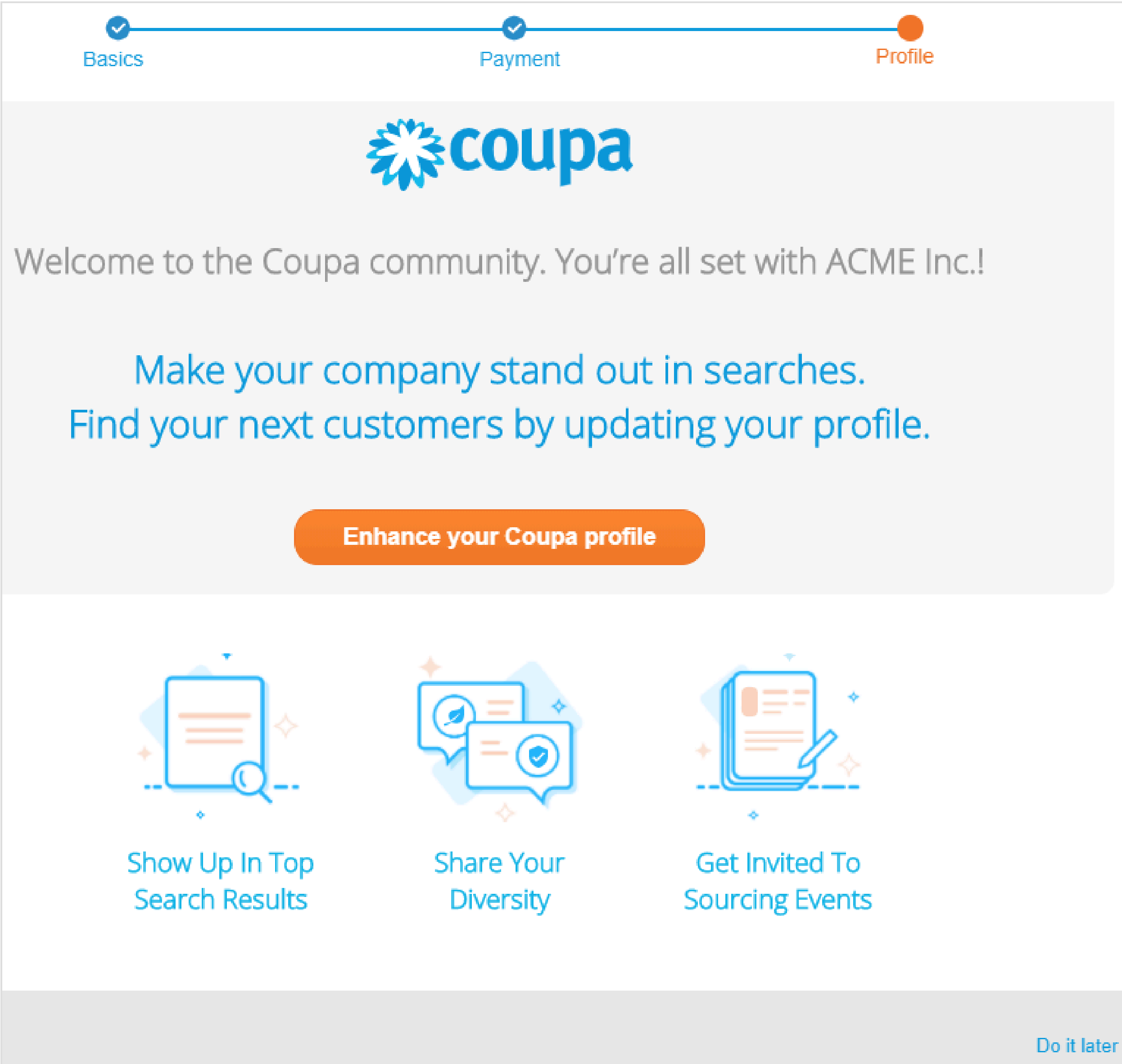
If you want to apply the selected payment terms to all your customers, select the **Use these preferences for all your customers** checkbox.

Tip: You can modify them later at any time from **Setup > Admin > Payment Preferences > Static Discounting**.

Use the **Back** button to go back to the pages with bank and basic information.

Profile

Clicking on the **Next** button takes you to the page informing you about your successful setup that allows you to do business with your customer.



You are encouraged to update your public profile so that other customers can also find you.

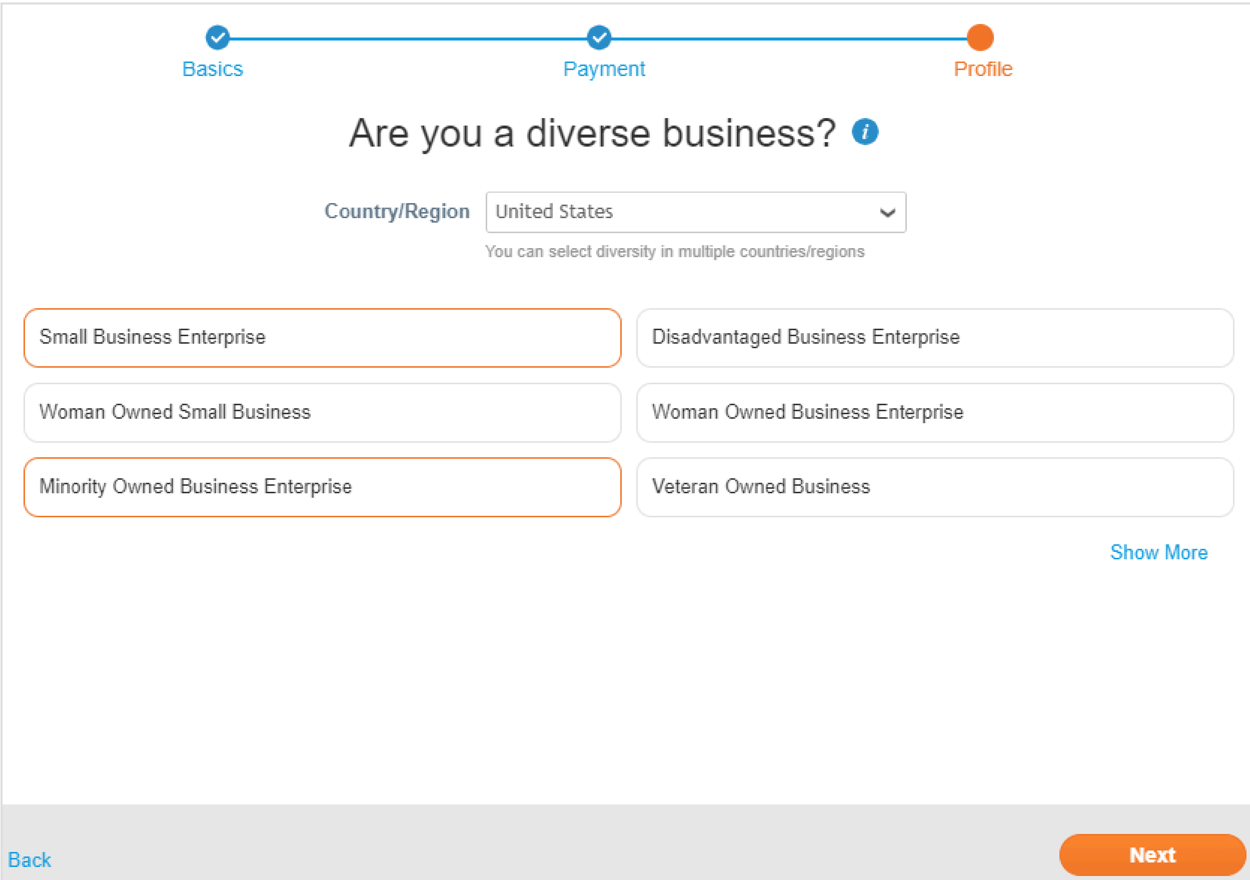
> **Note:** Providing more profile information is optional.

> **Tip:** If you want to provide your profile information later, click the **Do it later** link to exit the customer setup.

Click on the **Enhance Your Coupa Profile** button to provide profile information related to your diversity, commodities, and transactions.

On the **Are you a diverse business?** page, select a country/region from the dropdown list and select all the diversity types that apply. Your selections are highlighted.

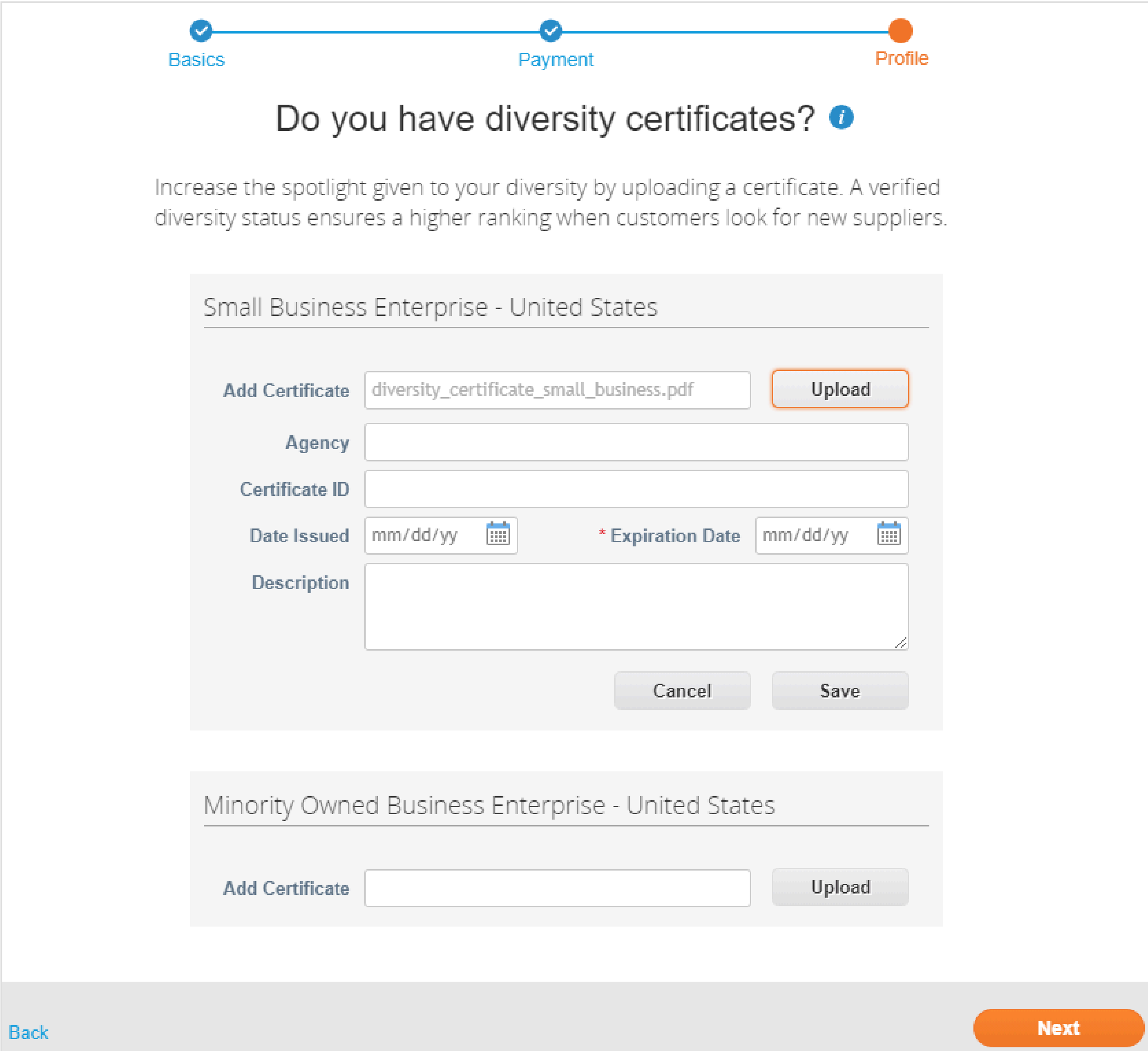
Tip: By default, your primary address country is selected. You can provide diversity information for several countries/regions.



Tip: By default, the six most frequently used diversity types are listed. To see more options, click **Show More**. The list of diversity types depends on the selected country.

Clicking on the **Next** button takes you to the **Do you have diversity certificates?** page where you can upload the relevant document(s).

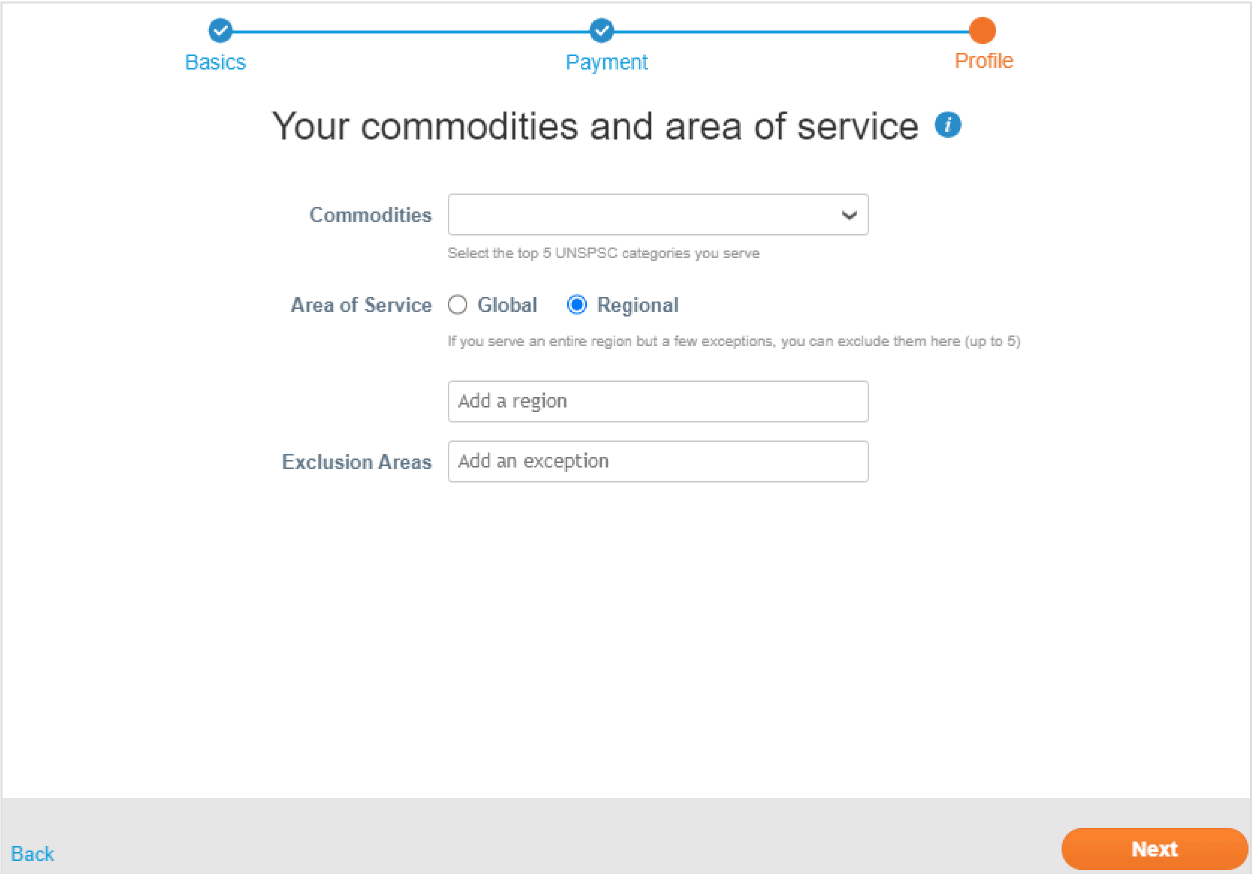
Tip: A verified diversity status ensures a higher ranking when customers look for new suppliers.



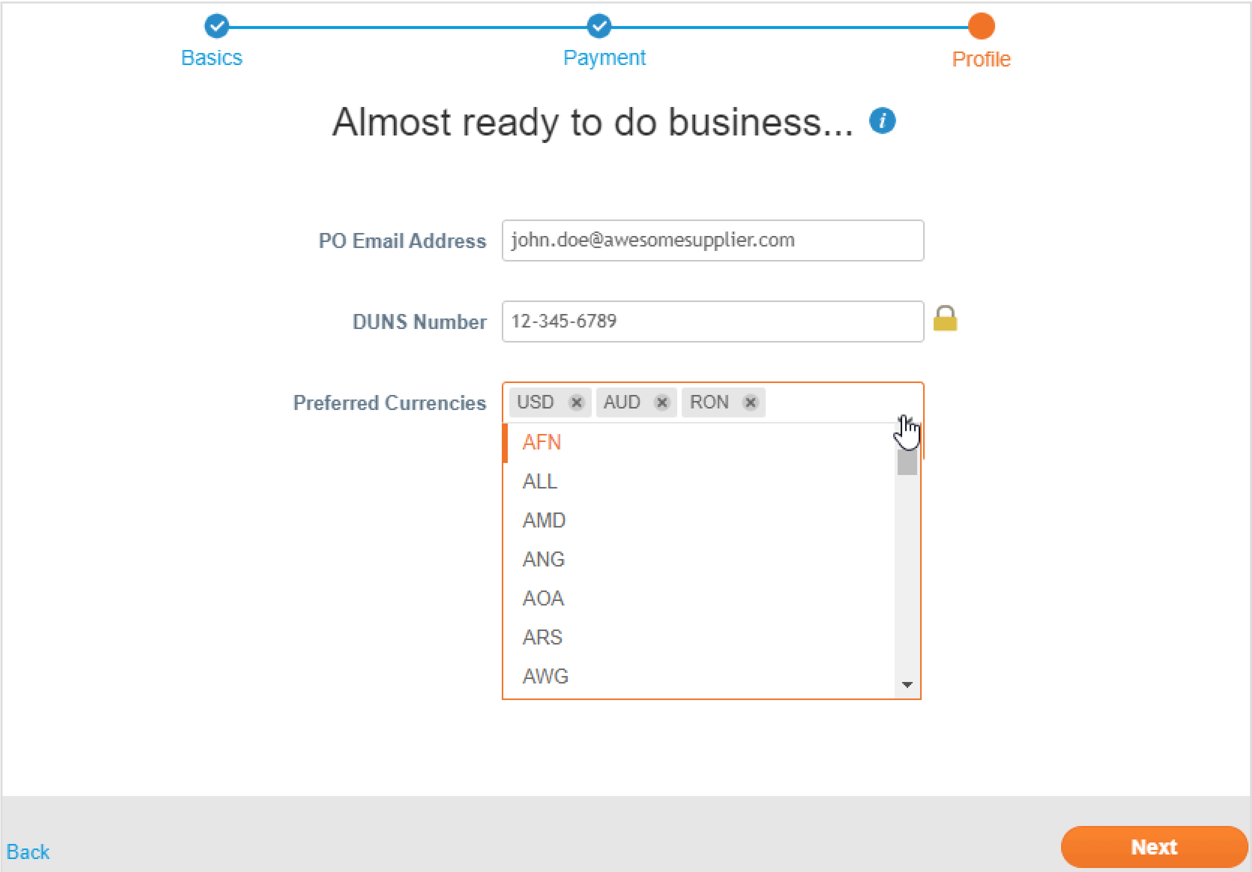
After uploading a certificate, you can select the certifying agency (or add it if it is not in the list), enter the certificate ID, indicate the issuance date and the (mandatory) expiration date, and provide a description.

Tip: You can upload multiple certificates for a diversity type.

Clicking on the **Next** button takes you to the **Your commodities and area of service** page where you can select the top five UNSPSC categories you serve from the **Commodities** dropdown list. Indicate your **Area of Service** by selecting the relevant radio button: **Global** or **Regional**. If you serve several regions, select the widest area that applies. You can exclude up to five areas by entering them in the **Exclusion Areas** field.

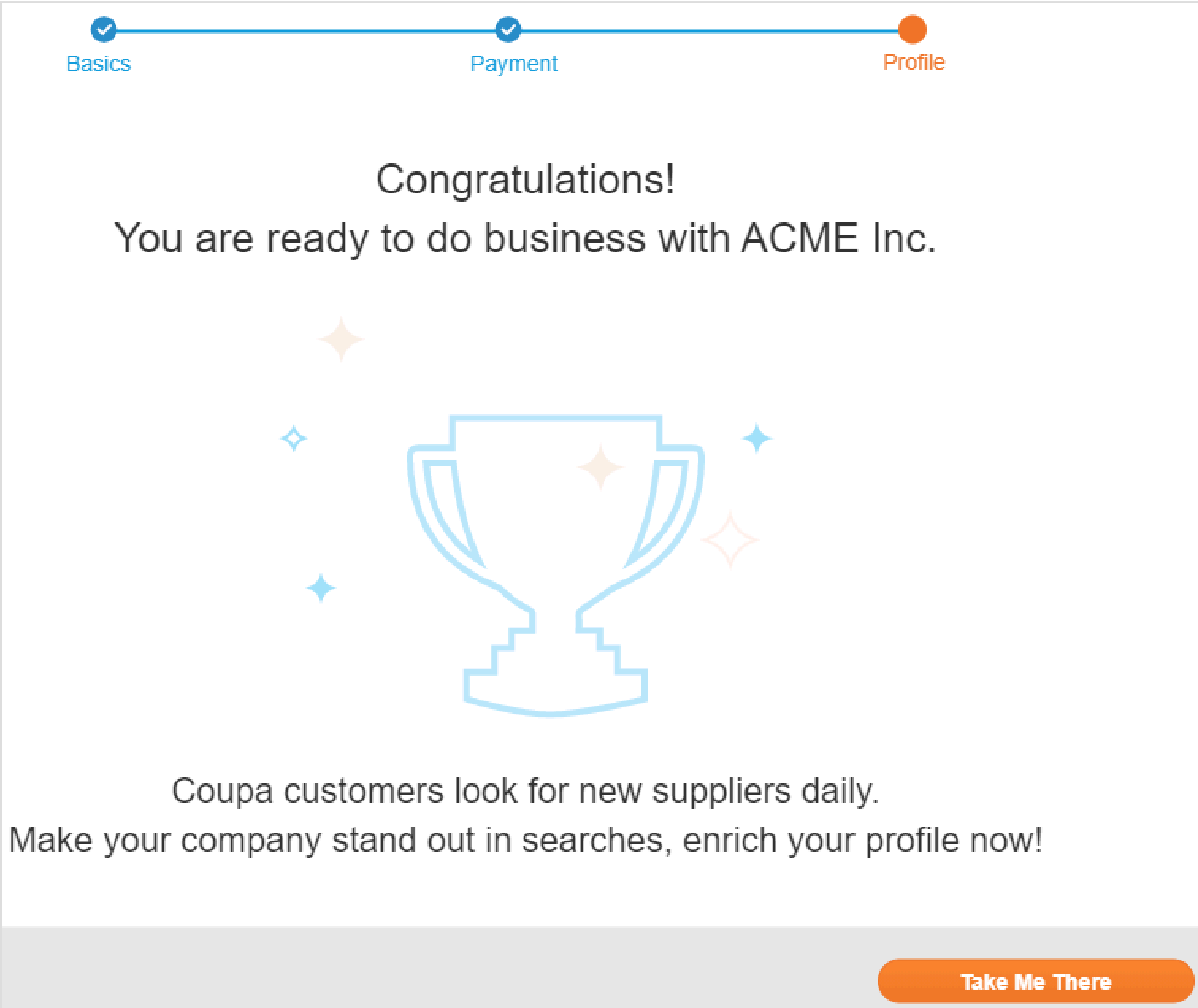


Clicking on the **Next** button takes you to the **Almost ready to do business...** page where you can provide your PO email address (where you want your customers to send you purchase orders), DUNS number, and preferred currencies.



Note: The DUNS number is secure information and is not published to your public profile.

Clicking on the **Next** button takes you to the **Congratulations** page informing you about your successful setup that allows you to do business with your customer.



You are encouraged to update your public profile so that other customers can also find you. Click on the **Take Me There** button to open your public profile in edit mode. For more information, see Create or Update Your Profiles.

> **Note:** Providing more profile information is optional.

> **Note:** If your customer requested additional supplier information, you are informed that you are one step away from doing business with your customer, and the **Take Me There** button directs you to your customer profile in edit mode to respond to the supplier information form request.

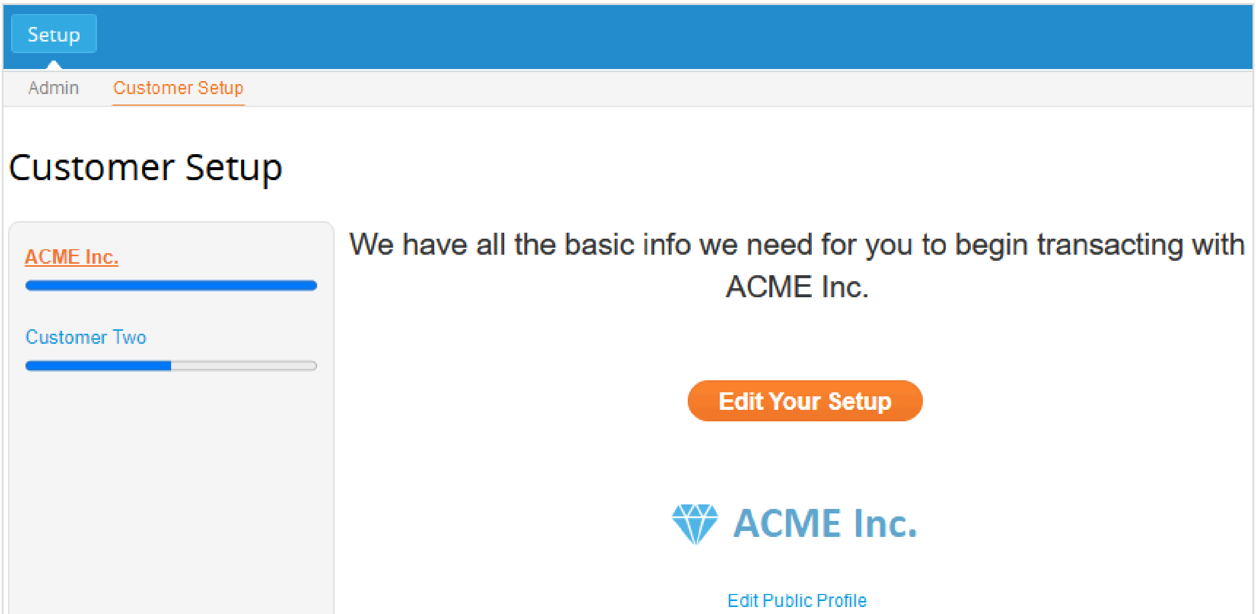
Customer setup progress

You can exit any element of the flow any time by closing it with the **x** in the right corner above the Coupa logo, and you can continue the flow to provide your information later.

On the **Setup > Customer Setup** page, you can see the list of all your customers and the status of your onboarding flow (setup progress) with each of them indicated by the green progress bar.

Select the customer name to see the relevant instructions and buttons to take the necessary actions.

- If you completed the onboarding flow, you can start transacting with your customer. You can go to the **Admin** page for more setup options by clicking the **Edit Your Setup** button, or you can edit your public profile by clicking the **Edit Public Profile** link.



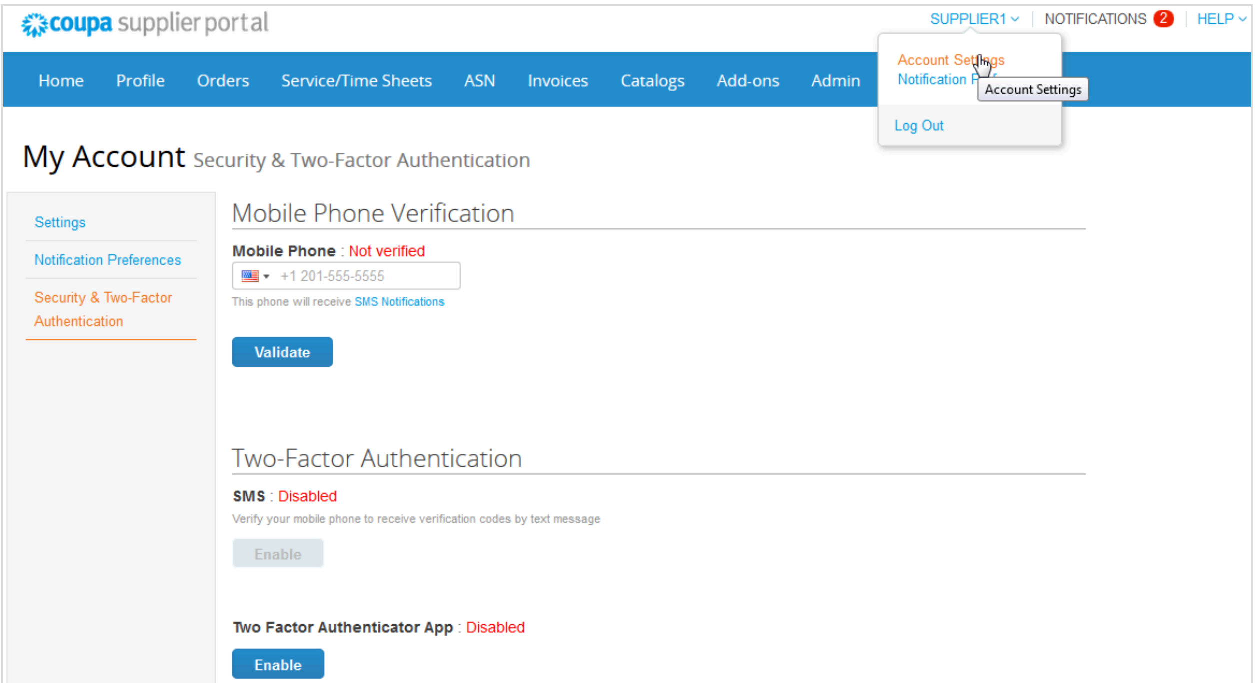
- If you exited the flow before completing it, you can resume it with the **Finish Setup** button.
- If you have not provided information for your customer, you can **Start** the flow.

If you have not completed the flow for a customer, you are prompted to complete the customer setup when you log in again.

Enable or Disable Two-Factor Authentication

On the **My Account** page, click on the **Security and Two-Factor Authentication** link to enable or disable two-factor authentication.

> **Note:** Your customers can require you to use two-factor authentication to access their data in the CSP, in which case you have to enable it.

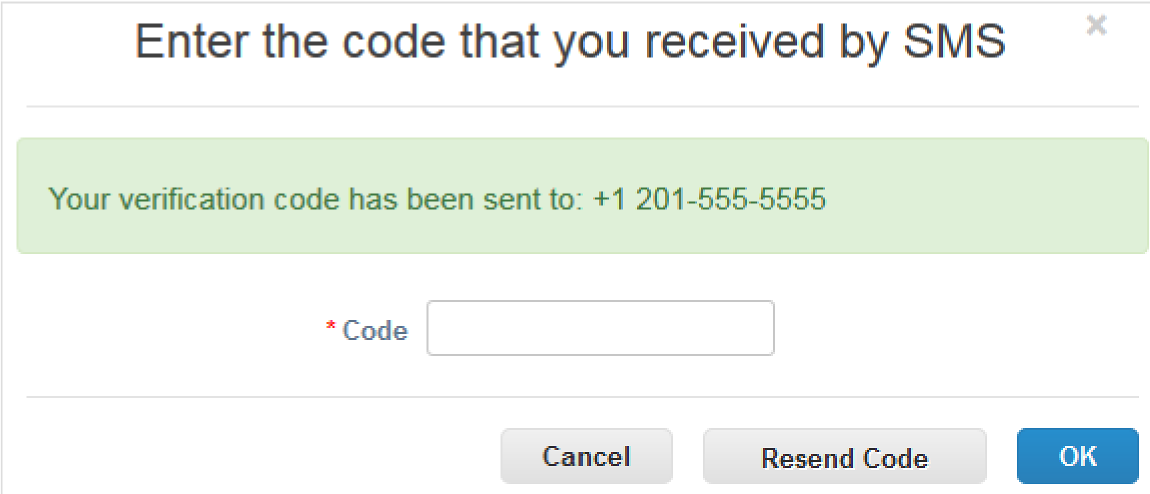


Enable two-factor authentication

> **Note:** If you want to receive SMS notifications or verification codes, you must enter and validate your phone number under **Mobile Phone Verification**.

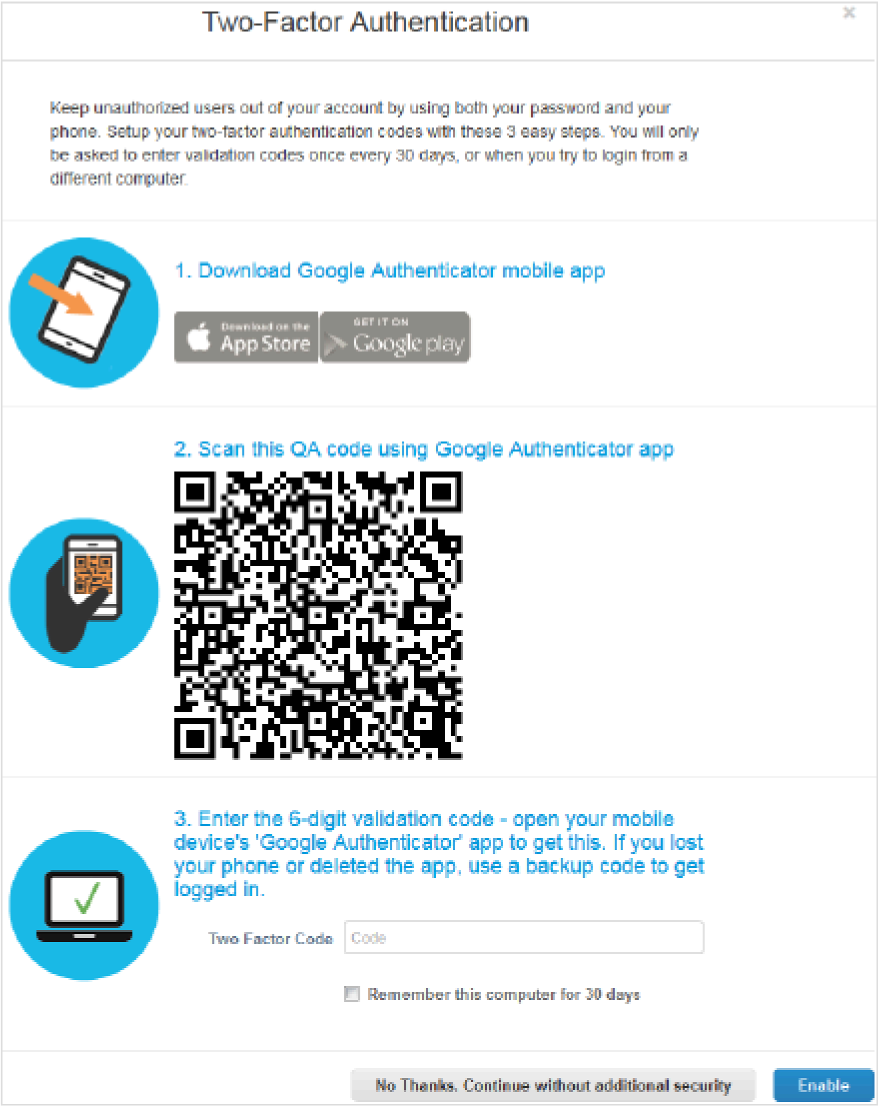
Under **Two-Factor Authentication**, click **Enable** for **SMS** or for **Two Factor Authenticator App** depending on how you want to receive the verification codes.

- For SMS, enter the verification code in the pop-up window.



After successful validation, you receive the verification codes in text messages.

- For installing and using Google Authenticator, follow the on-screen instructions.



Choose **Remember this computer for 30 day** if you are not using a shared or public computer, and click **Enable**.

Print your backup codes or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

> **Note:** You can only use a recovery code once, so refresh your list if you have to use a recovery code. Go to **Account Settings > Security & Two-Factor Authentication** and click **Regenerate Recovery Codes** to get a new list of codes.

For more information, see Install Google Authenticator.

Disable two-factor authentication

Under **Two-Factor Authentication**, click **Disable** for **SMS** or for **Two Factor Authenticator App** and, in the appearing window, enter your CSP password and click **Disable Two-Factor Authentication**.

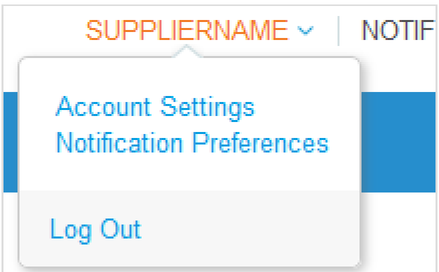
If you enable or disable two-factor authentication, you get an email notification of the change.

Manage Your Account

On the **My Account Settings** page, you can make changes to your personal information (name, department, role, and password), set or modify your notification preferences, or enable/disable two-factor authentication.

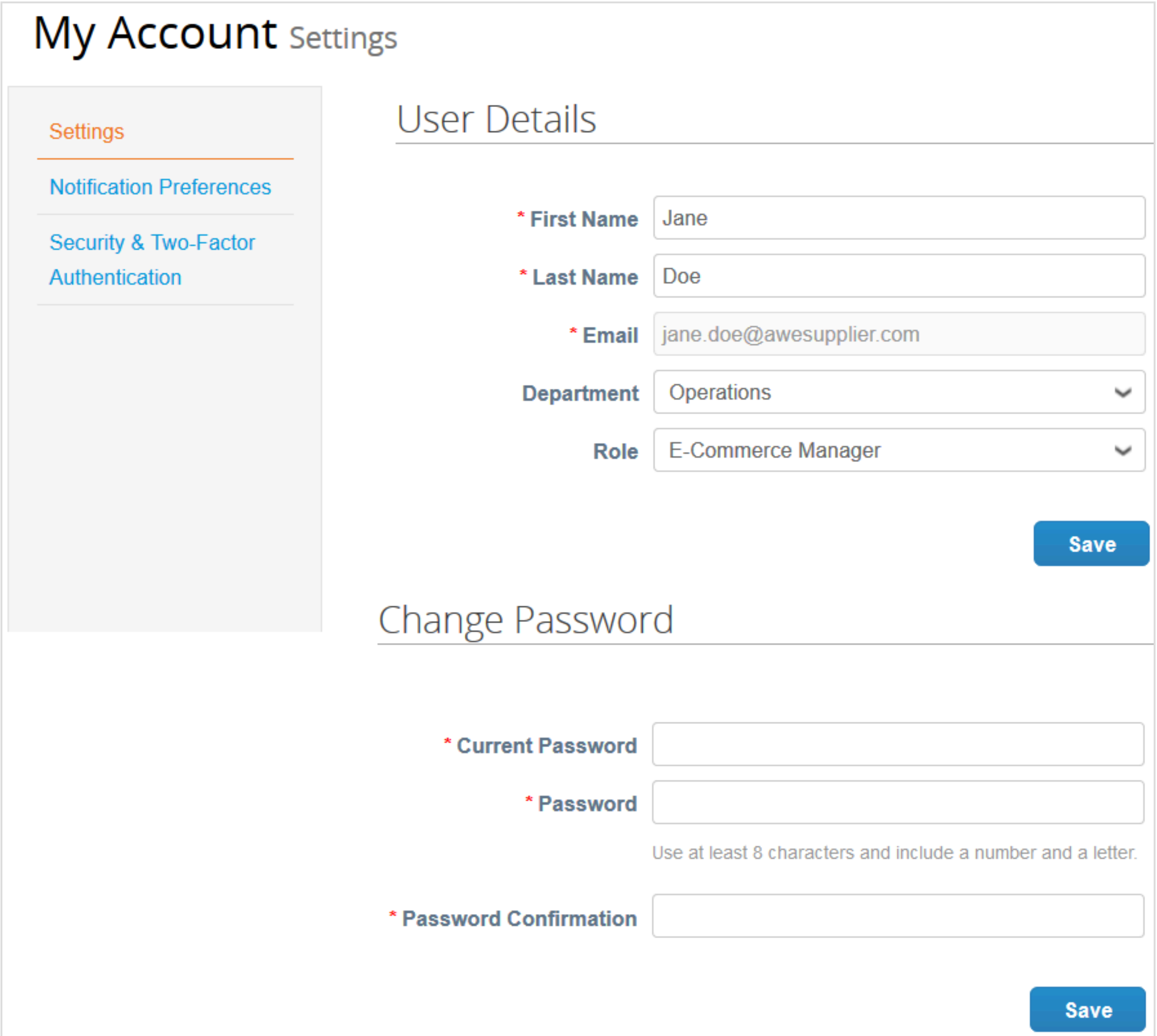
Note: You can access and edit you company information on the Profile page.

To change your account settings, click on your name link and on the **Account Settings** link.



Personal information

On the appearing **My Account Settings** page, fill in the fields you want to change, and then click **Save**. The asterisk (*) indicates mandatory fields.



Setting	Description
User Details	
*First name	This is you personal first name.
*Last name	This is your personal last name.
*Email	This field cannot be changed. If you want to change it, you have to create a new CSP account and connect it to your company. For more information, see Manage Users.
Department	The name of your department: Sales, Operations, Accounts Receivable, Treasury, or Other.
Role	Your role within the department: • Sales: Sales Manager, Sales Associate, Other

Setting	Description
	• Operations: E-Commerce Manager, Order Fulfillment/Inventory Management, Other • Accounts Receivable: Accounting Manager, Accounts Receivable Associate, Other • Treasury: Treasury Manager, Other • Other: Enter free text. **Tip:** If you select **Other** for **Department** and/or **Role**, the **User Specified Department** and/or **User Specified Role** fields are displayed for you to enter free text.
Change Password	
*Current Password	Your current password.
*Password	Use this field to change your password. It must be at least 8 characters long and it must include a number and a letter.
*Password Confirmation	This field needs to match the password that you typed in the Password field.

Click on the **Notification Preferences** link to set or modify your notification preferences. For more information, see View and Manage Notifications.

Click on the **Security & Two-Factor Authentication** link to enable/disable two-factor authentication. For more information, see Enable or Disable Two-Factor Authentication.

Navigate and Get Help

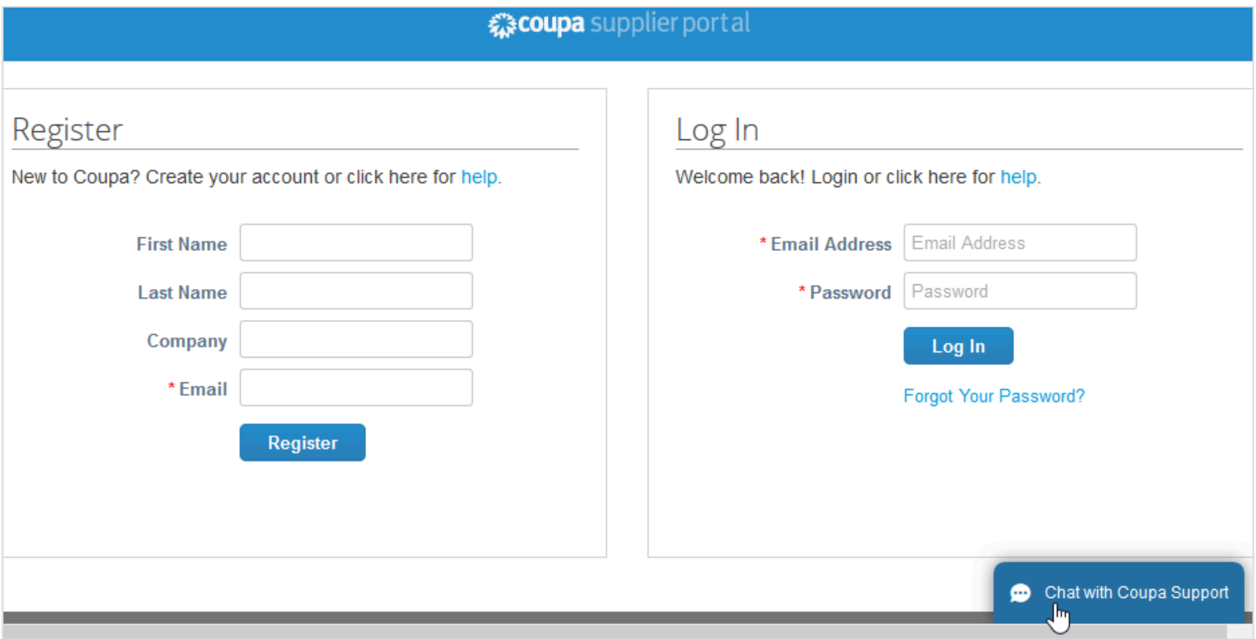
Help

Chat

Whether you are logged in to the CSP or not, you can chat with Coupa Support to get a quick response or resolution to your case.

Note: This is not a chat option for communicating with your customers.

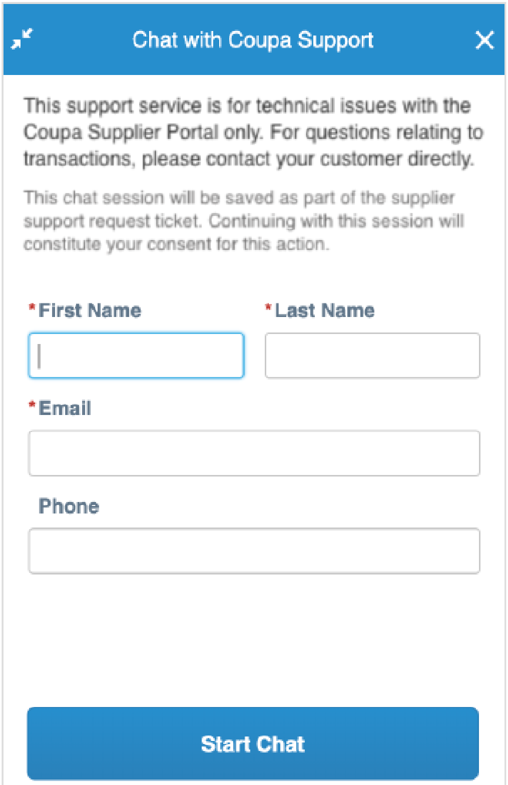
1. Click **Chat with Coupa Support** in the bottom right corner of the page to launch the chat.



Note: If all the support agents are offline or busy, you can **Send a support request** through an offline form in the same chat window.

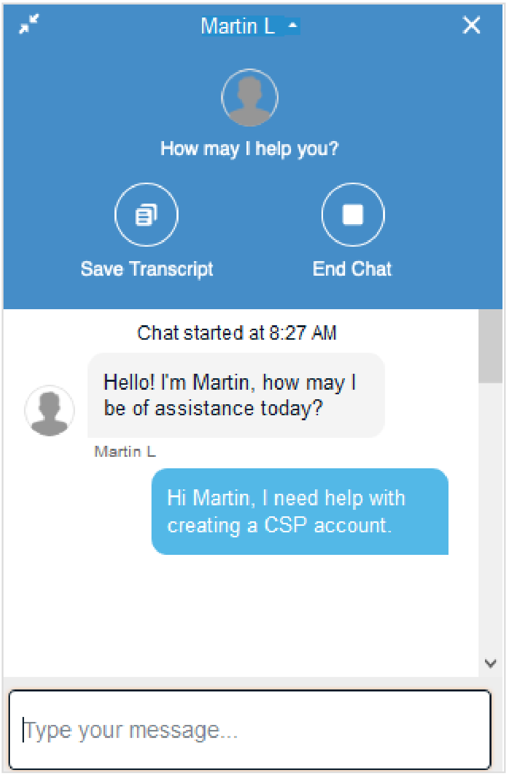
2. Provide your contact information: first name, last name, email address, and phone number (optional).

Tip: If you are logged in to the CSP, your contact information is pre-populated, but you can modify it.



> **Note:** If no support agent is available, you also need to provide the subject of your request and a detailed issue description, after which you can see a confirmation that your case was submitted and logged. A support agent contacts you as soon as they are available.

3. Start chatting with the support agent.



If the support agent asks you to send a file, a paperclip icon appears on the left of the field where you type your message.

Tip: After the chat ends, you can save the transcript.

Note: Your account and login information is not stored and support agents cannot log in to your CSP. However, information provided in the chat is logged, so do not provide unnecessary personal information.

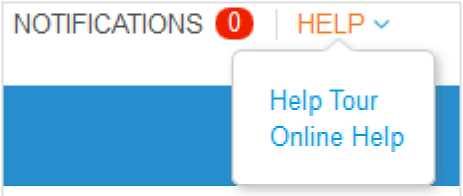
When you browse, the chat window persists on all the pages except for your **Public Profile** page, and you can minimize it by clicking on the opposite arrows icon in the top left corner.

The chat is available also when accessing the CSP from a mobile device.

Help Tour and Online Help

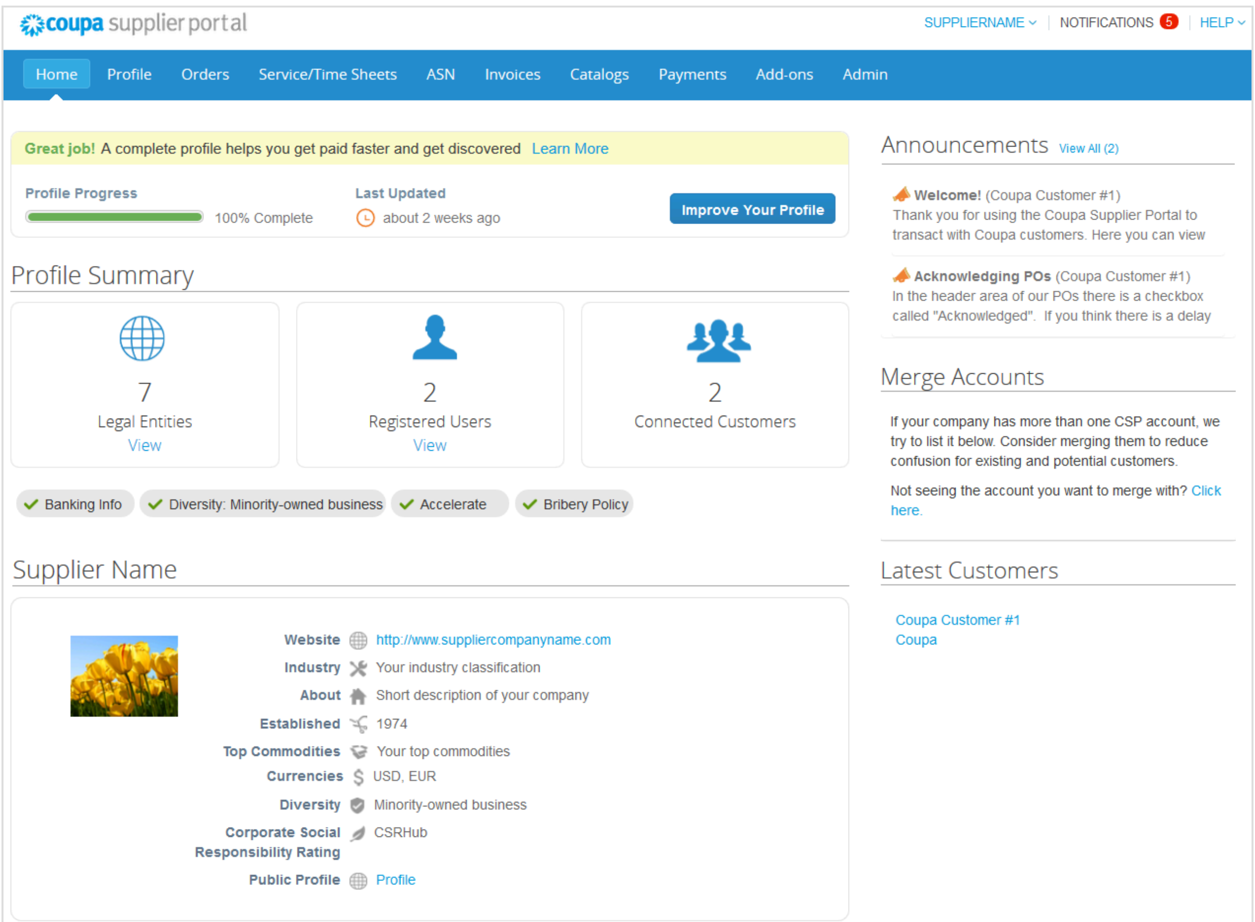
When you log in for the first time, you are greeted by the **Help Tour** (welcome tour) on the **Home** screen.

Click on the **Help** link in the top right corner of the page to access the **Online Help** or to view the **Help Tour** any time.



Main menu

To access a CSP function, click on the relevant tab on the main menu at the top of the CSP main page.

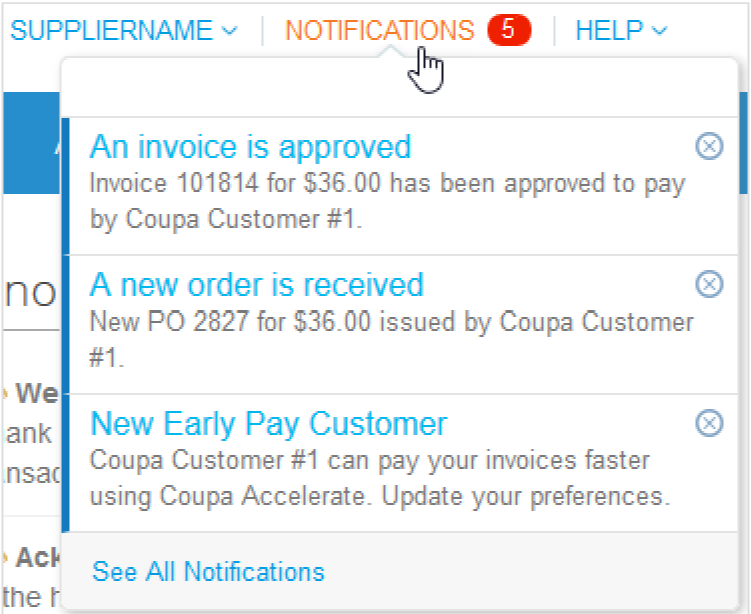


Menu Item	Description
Home	View and improve your public company profile, see the list of customers you are connected to, edit your customer-specific company profile, and merge accounts. You can go to the **Home** page from any page by clicking on the **coupa supplier portal** logo/link in the top left corner above the main menu.
Profile	Create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
Orders	View the purchase orders you received from your customers.

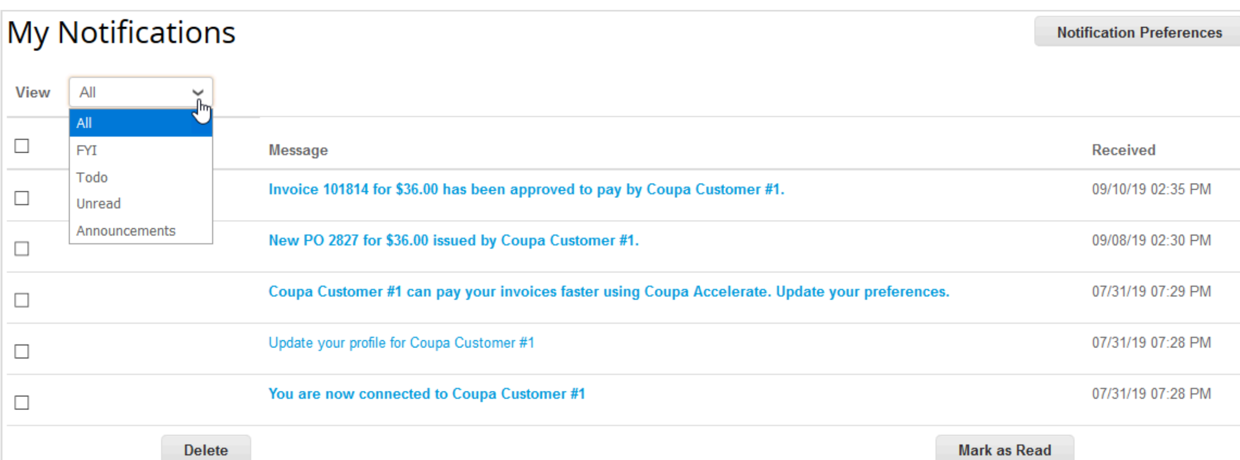
Menu Item	Description
Service/Time Sheets	View the list of service/time sheets and related purchase order lines.
ASN	Send advance ship notice, that is, notifications about when you ship items to your customers.
Invoices	Create and manage invoices to send to your customers.
Catalogs	Create and manage customer-specific catalogs.
Payments	Accept payment through digital checks from your customers if they use Coupa Pay.
Business Performance	View a summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.
Add-ons	Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.
Admin	Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use, and set preferred accelerated payment terms.

View and Manage Notifications

Hover your cursor over the **Notifications** link to see your unread system notifications. Only the three most recent notifications are shown.



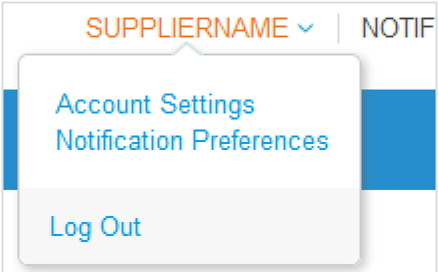
To view all the notifications with their details and to manage them, click on the **Notifications** or the **See All Notifications** link.



On the **My Notifications** page, you can view all your (read and unread) notifications, or you can filter by category (FYI, Todo, Unread, or Announcements). You can select and delete them all or one-by-one.

Clicking on a notification link takes you to the relevant page.

To change your notification preferences, click on the **Notification Preferences** button in the top tight corner. Or click on your name link and on the **Notification Preferences** link.



You can access the notification preferences also from your **Account Settings**. For more information, see Manage Your Account.

On the **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive any or all of the notification types: online (to do list), email, or SMS (short text message). You will start receiving notifications when your customers enable them.

> **Note:** You can choose to receive notifications in short text messages only if you have an SMS-capable device and you validate your phone number. For more information, see Enable or Disable Two-Factor Authentication.

SMS notifications are turned off by default.

If you turn SMS notifications on, but you disable mobile phone verification, your SMS notification selections are deleted. You can also stop receiving SMS notifications if you reply STOP.

Setting	Description
Announcements	
New Customer Announcement	Enabled by default: Online and Email **Note:** You cannot disable online notifications for announcements.
Business Performance	
Business Performance role granted	Enabled by default: Online
Catalogs	
A new comment is received	Enabled by default: Online and Email
A catalog is approved	Disabled by default.
A catalog is rejected	Disabled by default.
A catalog is about to expire	Disabled by default.
Coupa Accelerate	
New Early Pay Customer	Enabled by default: Online and Email

Setting	Description
Coupa Pay – Available only if your customer uses Coupa Pay and enabled the related features.	
New digital check	Enabled by default: Online and Email
New virtual card	Enabled by default: Online and Email
Virtual card reissued	Enabled by default: Online and Email
Virtual card reminder	Enabled by default: Online and Email
Payment role given to user	Enabled by default: Online and Email
Virtual card processing failure	Enabled by default: Online and Email
Bank transfer remittance advice	Enabled by default: Online and Email
Virtual card remittance advice	Enabled by default: Online and Email
Zero payment remittance advice	Enabled by default: Online and Email
Digital Check Cancelled	Enabled by default: Online and Email
Virtual Card Cancelled	Enabled by default: Online and Email
Early Payments – Available only if your customer enabled the feature.	
Early payment request expired	Enabled by default: Online and Email
Early payment request rejected	Enabled by default: Online and Email
Early payment request matched	Enabled by default: Online and Email
Early payment request paid	Enabled by default: Online and Email
Form Responses	
A form response is approved	Enabled by default: Online and Email
A form response is rejected	Enabled by default: Online and Email
Supplier information is updated	Enabled by default: Online and Email
A new comment is received	Notifies you if your customer sends you a new comment or a reply to your question/comment regarding a Supplier Information Management (SIM) form request/response. Enabled by default: Online and Email
A form response needs your attention	Enabled by default: Online and Email
Integration Errors	
Enable notification for integration error	Disabled by default.

Setting	Description
Invoices	
A new comment is received	Enabled by default: Online and Email
An invoice is approved	Enabled by default: Online and Email
An invoice is paid	Enabled by default: Online and Email
An invoice is disputed	Enabled by default: Online and Email
An invoice is withdrawn from dispute	Enabled by default: Online and Email
Legal Invoice Export Ready	Enabled by default: Online and Email
An invoice is abandoned	Enabled by default: Online and Email
Orders	
A new comment is received	Enabled by default: Online and Email
A new order is received	Enabled by default: Online and Email
An order is canceled	Enabled by default: Online and Email
Order Header Changes	
Order change request is rejected	Enabled by default: Online and Email
Profile	
Public profile is updated	Disabled by default.
An information update request is received	Enabled by default: Online and Email
Profile update reminder is received	Disabled by default. Future functionality.
Update information requests	Disabled by default. Future functionality.
Receipt Request	
Receipt created	Disabled by default.
Terms of Use	
New Terms of Use are received	Enabled by default: Online and Email
Users	
A new customer connection is created	Enabled by default: Online and Email
Service/Time Sheets	

Setting	Description
A Service/Time Sheet is approved	Enabled by default: Online and Email
A Service/Time Sheet is rejected	Enabled by default: Online and Email

You also receive notifications displayed in a green bar following certain actions, for example:

Note: If you change your notification preferences, remember to save them.

Work with the CSP

This chapter contains the following topics:

View Business Performance Data

You can view a summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.

View Customer Announcements

View announcements from your customers.

Configure Punchouts

Configure customer-specific punchouts by going to the Catalogs page and clicking on the Configure Punchout button.

Configure the PO Delivery Method

Select how you want to receive orders on the Orders page by configuring the PO delivery method.

Create or Edit an ASN

Notify your customer in advance of a shipment.

Create or Edit an Invoice

Work with existing invoices or create new invoices without a backing PO.

Create or Edit a Catalog

Create or edit a customer's catalog by going to the Catalogs page and by selecting the specific customer.

Create or Edit a Service/Time Sheet

Work with service/time sheets to provide information about your progress.

Create or Edit Catalog Items

Create or edit items in your customer-specific catalogs.

Edit a PO

Edit purchase orders and purchase order lines.

View and Download Digital Checks

Accept payment through digital checks from your customers if they use Coupa Pay.

View and Manage ASNs

View ASN information that you shared with your customers.

View and Manage Catalogs

View, edit, or delete your customer-specific catalogs.

View and Manage Invoices

View and edit invoices that you sent to your customers.

View and Manage Payments

View and manage overdue payments, early payment discount requests, tasks, and payment preferences.

View and Manage POs

View purchase orders received from your customers.

View and Manage Service/Time Sheets

View, edit, delete, or withdraw service/time sheets.

View Invoice Lines

View individual invoice lines by going to Invoices > Invoice Lines.

View PO Lines

View individual PO lines by going to Orders > Order Lines.

View Public Sourcing Events

You can access and participate in public sourcing events.

View Service/Time Sheet Lines

View individual service/time sheet lines by going to Service/Time Sheets > Service/Time Sheet Lines.

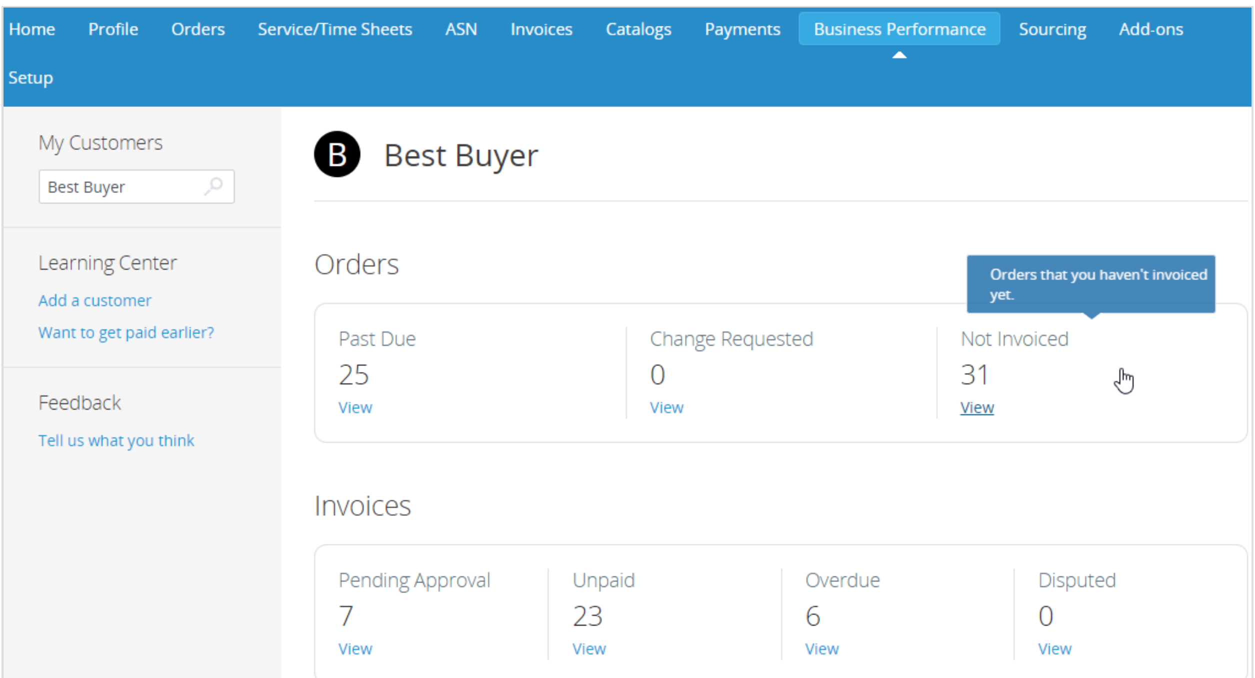
View Business Performance Data

Click on the **Business Performance** tab on the main menu to view a summary of orders and invoices that may need attention, and year-to-date order, invoice, and delivery time trends.

> **Note:** You can see this page only if you have the **Business Performance** permission. For more information, see Manage Users.

View the order/invoice summary dashboards

In the top left corner, select from the list or search for the customer for which you want to see performance data.



The selected customer name appears at the top of the page and below it, you can see a summary (with numbers and statuses) of your orders and invoices that need attention as follows:

Document Type	Status	Description
Orders		
	Past Due	For an issued order, if the "need by date" has passed and the order is not complete.
	Not Acknowledged	The number of orders that you have not acknowledged. Shown only if you acknowledged at least one order in the past.
	Change Requested	Orders for which you or your customer have requested a change.
	Not Invoiced	Orders that you have not invoiced yet.
Invoices		
	Pending Approval	Invoices that have not been approved by your customer yet.
	Unpaid	Coupa Pay customer invoices that have not been paid yet.
	Overdue	Invoices that have not been paid yet and are past the due date.
	Disputed	Invoices that you or your customer have marked as disputed to indicate an invoice discrepancy.

Tip: To see the description for a status, hover your cursor over the relevant number.

Clicking on the **View** links takes you to the **Orders** or **Invoices** page, respectively, showing only the list of orders/ invoices relevant to the status selected to view.

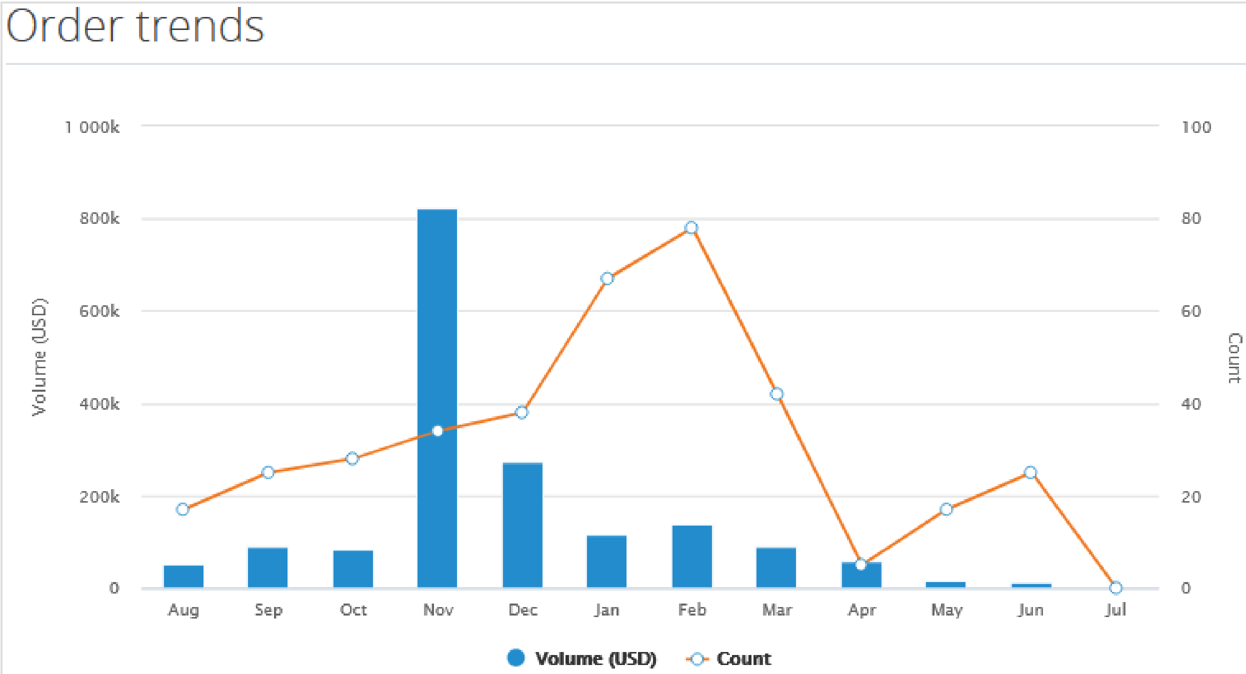
Note: The **View** links are visible only if you have permission to view orders/invoices.

View order/invoice/delivery time trends

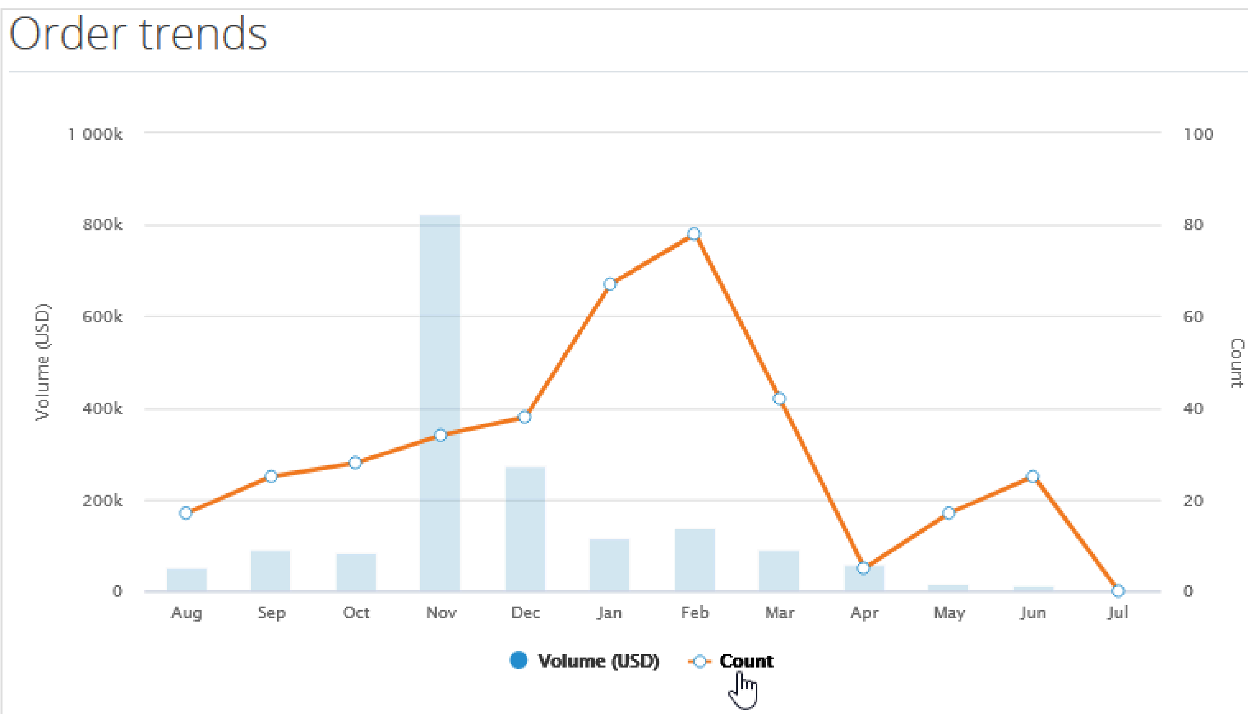
Below the summary dashboards, you can find graphs for order, invoice, and delivery time trends for the past 12 months.

Note: The data provided is directional and for informational purposes only, and may be delayed up to one-two weeks.

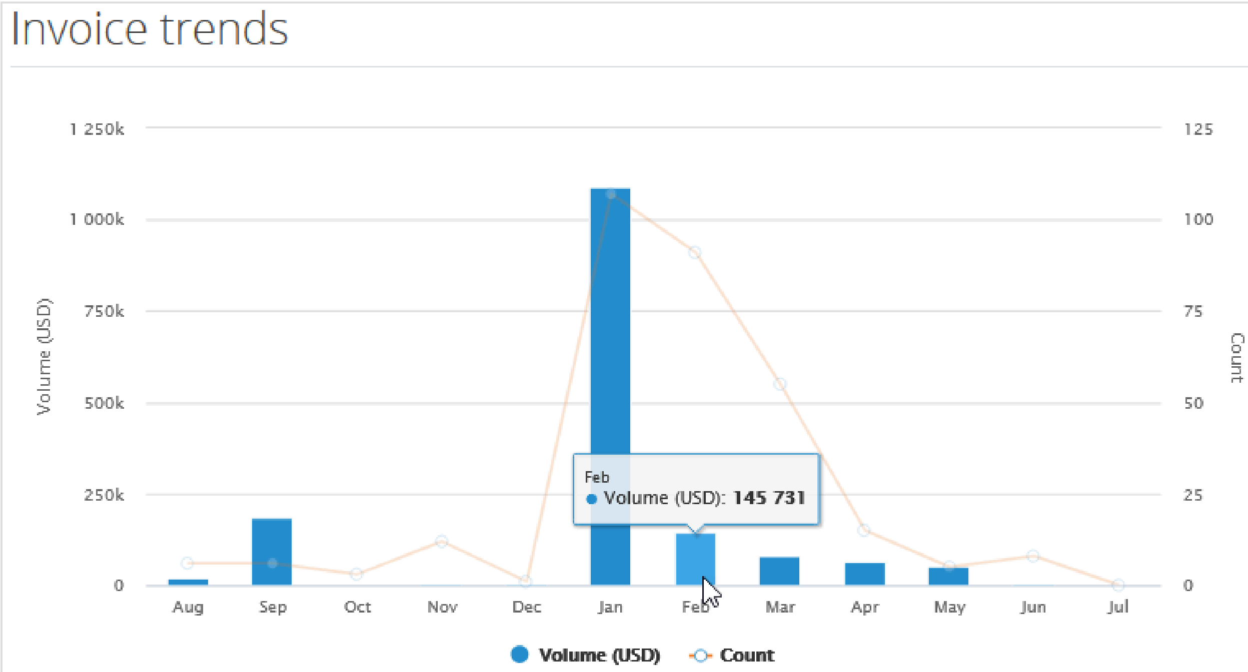
The order/invoice graphs show the volume/amount and count/number of your orders/invoices by month.



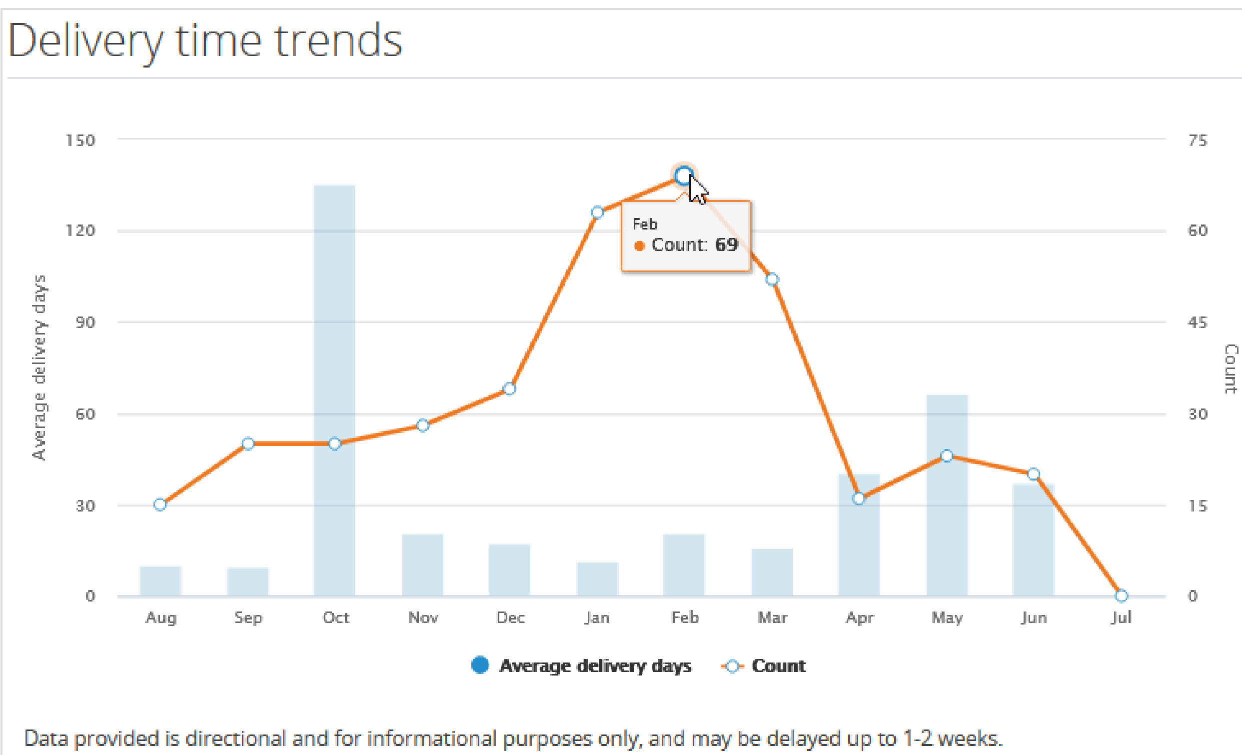
Hover your cursor over **Volume** or **Count** in the legend to highlight the relevant data.



Hovering your cursor over the volume bar or count line shows you the volume or count of orders/invoices by month.



Delivery time trends show the average delivery days (time in days between the order date and the receipt date) and the number of orders delivered by month. Hover your cursor over the graph to see details.



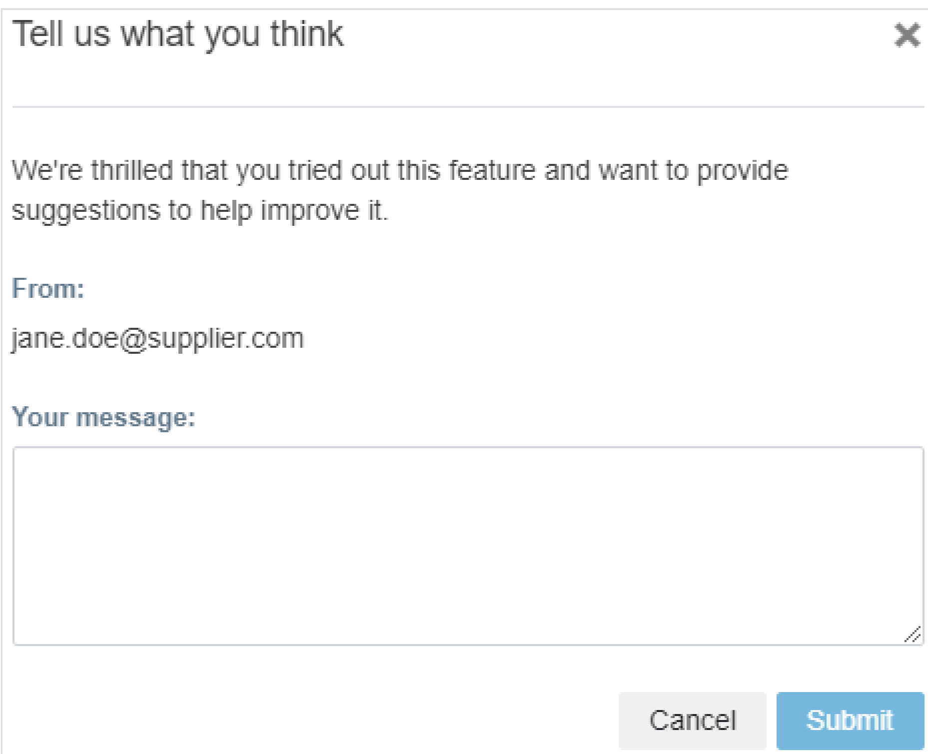
Cases when data or customer is missing

- If no data is available, for exmaple, there are no orders or invoices with the selected customer, the **We could not find any relevant (order/invoice) data** message is displayed.
- If you have no transactions (orders or invoices) with a customer, the **Before we can show you any cool stuff we need you to get some orders and invoices in here!** message is displayed.
- If you are not connected to any customers, the following message is displayed: **You need to be connected to your customer before we can show you any cool stuff. Ask your customer to send you an email invitation from Coupa. This document explains the steps they need to take. It's super easy.** The This document link takes you to the page where you can learn how to add and connect with a customer in the CSP.

Learn more and provide feedback

In the top right corner below the list of customers, you can find the **Learning Center** and **Feedback** sections. Click on the following links:

- Add a customer to learn how to add and connect with a customer in the CSP.
- Want to get paid earlier? to learn about payment options.
- **Tell us what you think** to provide feedback and suggestions to Coupa.



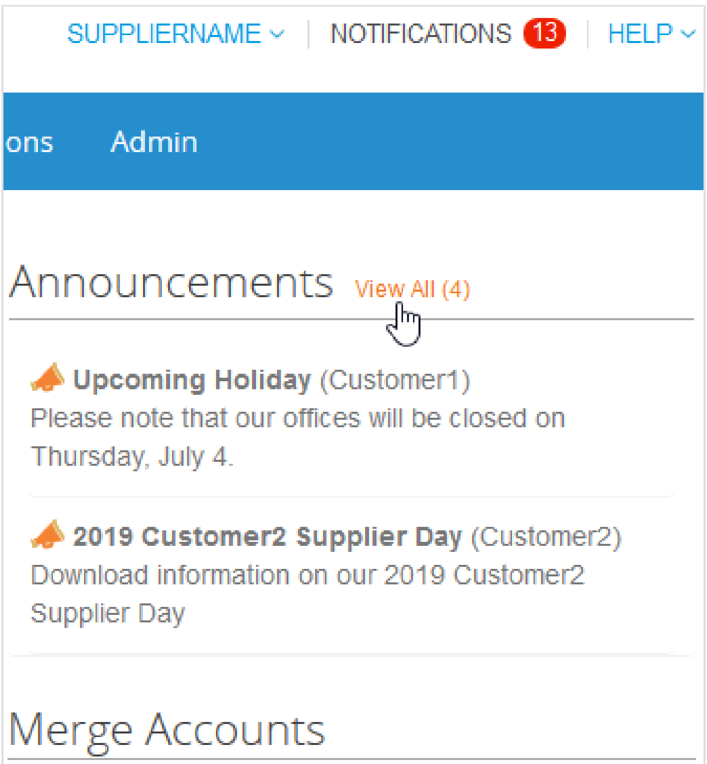
The **Submit** button is enabled only when you enter text in the **Your message** field. After submitting your message, a green notification bar informs you about **Feedback sent**.

Tip: You can also send an email directly to csp-bpm@coupa.com.

View Customer Announcements

Your customers can create announcements to be shown to you on the **Home** page and/or other Coupa Supplier Portal (CSP) pages to help you understand their unique onboarding requirements and communicate with you about initiatives, promotions, and changes required for your collaboration through the CSP. With this one-way communication, your customers can, for example, provide you with instructions on how to join or what to do after joining the CSP, share with you information necessary for transactions, inform you about upcoming orders, remind you of updating supplier information, and more.

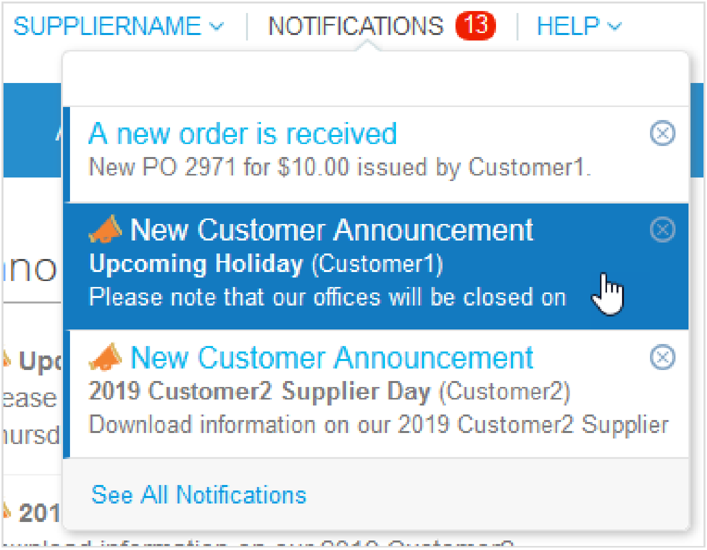
You can see your customers' announcements at the top of the right section of the **Home** page.



Note: By default, only previews of the two most recent announcements are displayed. You can see the full text of an announcement in a popup after clicking on it.

To view all the announcements with their full message, click on the **View All (n)** link that takes you to the **My Notifications** page filtered by **Announcements**. For more information, see View and Manage Notifications.

The announcements are also shown where all the other notifications appear, that is, in the **Notifications** and **My Notifications** sections.

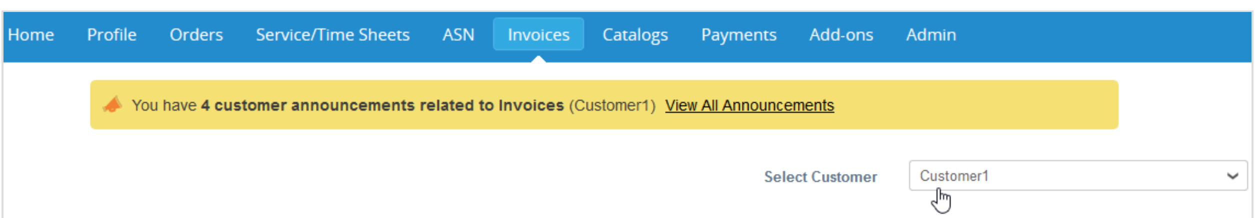


Online notifications are on by default.

> **Note:** You cannot disable online notifications for announcements. Customers' announcements are always shown on the **Home** and **My Notifications** pages for the set period of time.

Depending on your notification preference settings, you can also get online and/or SMS notifications.

If your customer selected other pages to inform you about their announcements, you can see a yellow banner at the top of those pages notifying you about the number of announcements for those specific areas from the selected customers and the link from which to access those announcements.



The banner is not visible on the **Home**, customer-specific **Profile** view, **Admin**, and **Add-ons** pages, and on the **Public Profile** page accessed from the link under the **Public Profile** section on the **Home** page.

Clicking **View All Announcements** directs you to the **My Notifications** page filtered by **Announcements**. For more information, see View and Manage Notifications.

Your customers can delete or edit their announcements. Deleted and expired announcements disappear from the CSP. Also, if you delete a notification for an announcement, the announcement disappears from the **Home** page, too.

Configure Punchouts

You can configure a punchout for a specific customer.

Note: You can configure your punchout only if your customer allows you to modify your profile.

On the **Catalogs** page, select the customer whose settings you want to modify and click on the **Configure Punchout** button.

In the appearing window, provide the necessary information.

Punchout settings

All the fields are mandatory.

Setting	Description
Name	Name of the punchout, as it appears to users within Coupa.
URL	The full punchout URL required to receive purchase orders in Coupa.
Buyer Identity	Your customer's `DUNS` or `NetworkID`.
Buyer Domain	Part of the **From** section of the header in the `OrderRequest` cXML. It can be anything you define, but it is usually `DUNS` or `NetworkID`, depending on the corresponding identity value.
Supplier Identity	Your `DUNS` or `NetworkID`.
Supplier Domain	Part of the **To** section of the header in the `OrderRequest` cXML. It can be anything you define, but it is usually `DUNS` or `NetworkID`, depending on the corresponding identity value.
Shared Secret	A password that you and your customer agreed upon. If no shared password is specified, Coupa automatically passes `none`.
Protocol	This field should always be `cxml`.

Configure the PO Delivery Method

You can configure how you receive POs from a specific customer.

> **Note:** You can configure your PO delivery method only if your customer allows you to modify your profile.

On the **Orders** or **Order Lines** page, select the customer whose settings you want to modify and click on the **Configure PO Delivery** button.

In the appearing window, select your PO delivery method and provide the necessary information.

PO delivery settings

Column	Description
Purchase Order Method	Choose how to receive POs from your customer: • Email: Coupa automatically emails POs to the email address you enter. • cXML: Coupa sends the PO via cXML. You have to enter the cXML settings to use this option. • None **Note:** If you want to use a method not listed here, talk to you customer about alternatives.
PO Email	This field is required for receiving POs via email. Coupa sends POs to this email address. To specify multiple addresses, separate them with a comma.
cXML URL	The full PO routing URL to receive POs.
cXML Domain	Part of the **From** section of the header in the `OrderRequest` cXML. It can be anything you define, but it is usually `DUNS` or `NetworkID`, depending on the corresponding identity value.
cXML Identity	Your customer's `DUNS` or `NetworkID`.
cXML Supplier Domain	Part of the **To** section of the header in the `OrderRequest` cXML. It can be anything you define, but it is usually `DUNS` or `NetworkID`, depending on the corresponding identity value.
cXML Supplier Identity	Your `DUNS` or `NetworkID`.
cXML Secret	A password that you and the customer agreed upon. If no shared password is specified, Coupa automatically passes `none`.
cXML Protocol	This field should always be `cxml`.

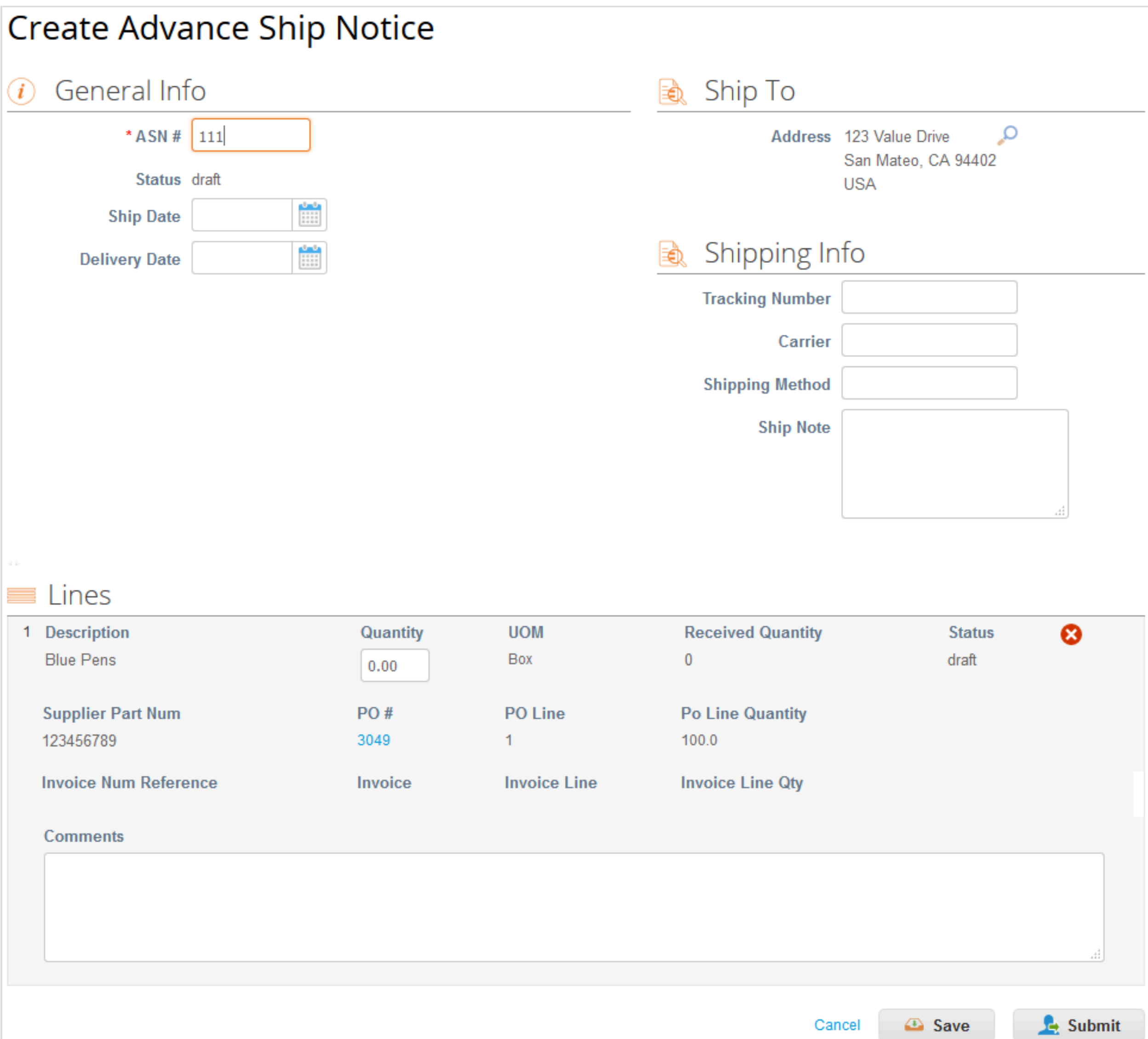
Create or Edit an ASN

Note: This feature is available only if your customer enables it in Coupa.

When you receive a purchase order, you can flip it into an ASN and send it to your customer by clicking on the **Flip to ASN** ( ) icon for it in the **Purchase Orders** table. For more information, see View and Manage POs.

To edit a draft ASN or update one in pending receipt status, click on the Edit ( ) icon for it in the **Advance Ship Notices** table.

On the **Create Advance Ship Notice** page, fill in at least the mandatory fields (marked with a red asterisk).



Click on the **Submit** button to send the ASN to your customer, or on the **Update** button if you are sending an updated

ASN.

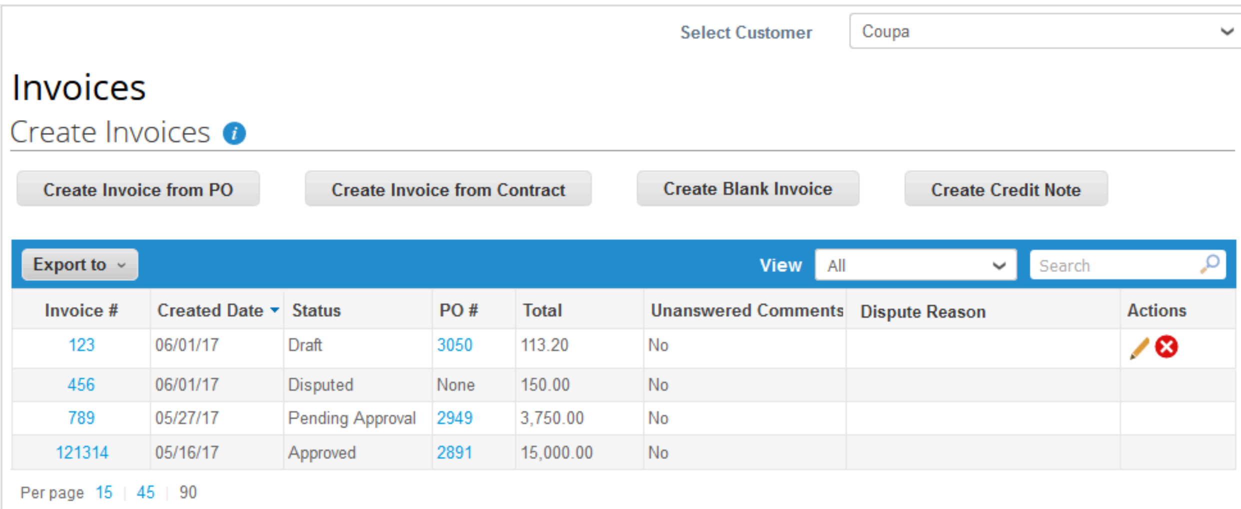
> **Note:** When you send an ASN to a customer, the PO status changes to **Issued** even if you have not sent the customer an invoice yet.

Create or Edit an Invoice

From the drop-down list in the top right corner of the **Invoices** page, select the customer for whom you want to create or edit an invoice or a credit note.

Click on the relevant button above the **Invoices** table to:

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



> **Note:** Buttons are active only for the actions that you can do. For example, if your customer did not enable you to create invoices without a backing document, the **Create Blank Invoice** button is inactive.

The **Info** icon with the tooltip next to the **Create Invoices** header advises you what to do if you cannot create an invoice as expected, for example, contact your customer to enable more invoicing options for you.

> **Note:** At the top of the page, you might see instructions from your customer.

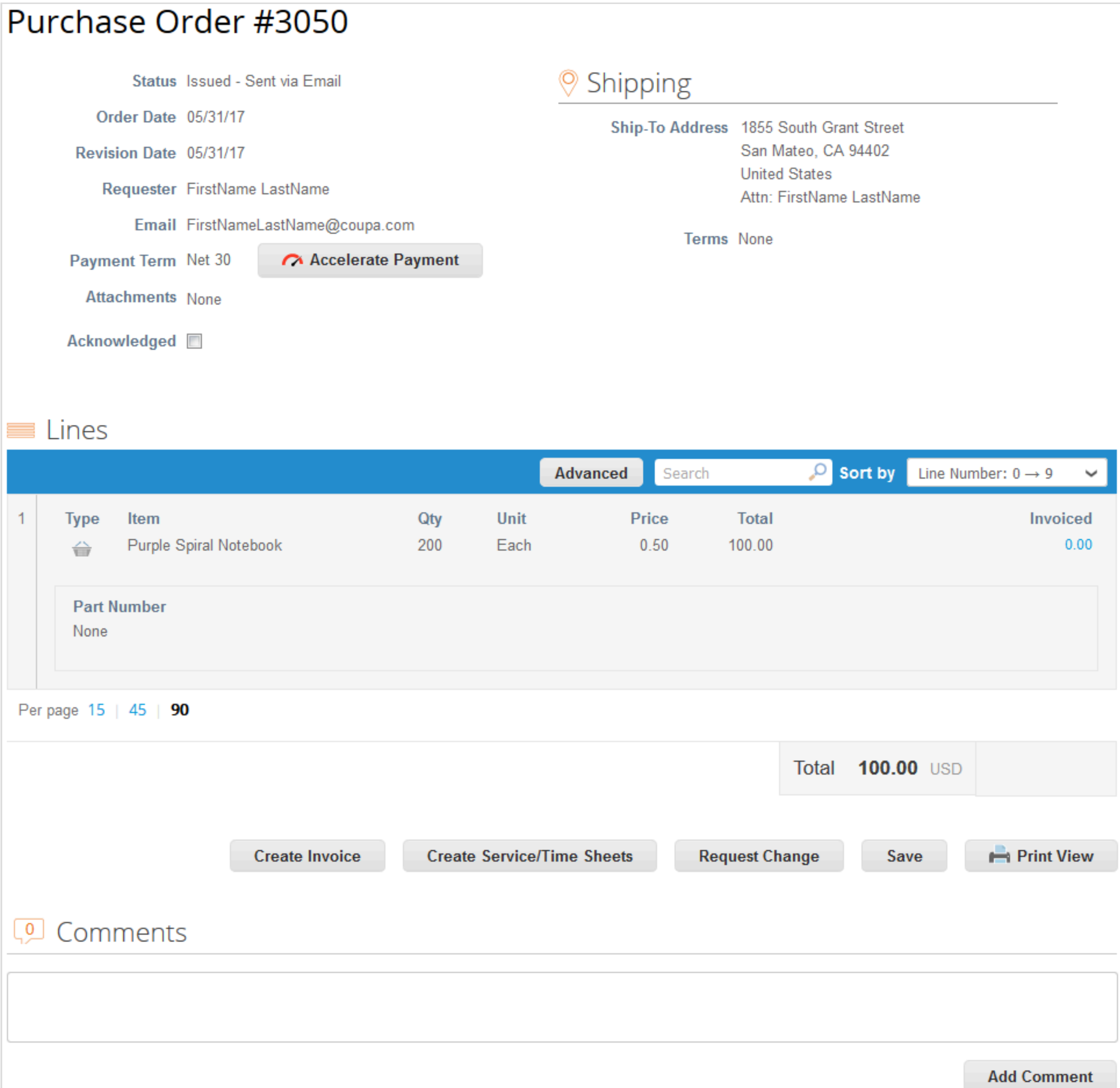
Create an invoice from a PO

1. Go to the **Orders** page or, on the **Invoices** page, click on the **Create Invoice from PO** button above the table to go to the **Orders** page.
2. On the **Orders** page, do one of the following:

- Click on the **Create Invoice** ( ) icon for the PO in the **Actions** column of the **Purchase Orders** table.

  Depending on your customer's settings, the tooltip text of the icon can also be **Accept PO and Create Invoice**.

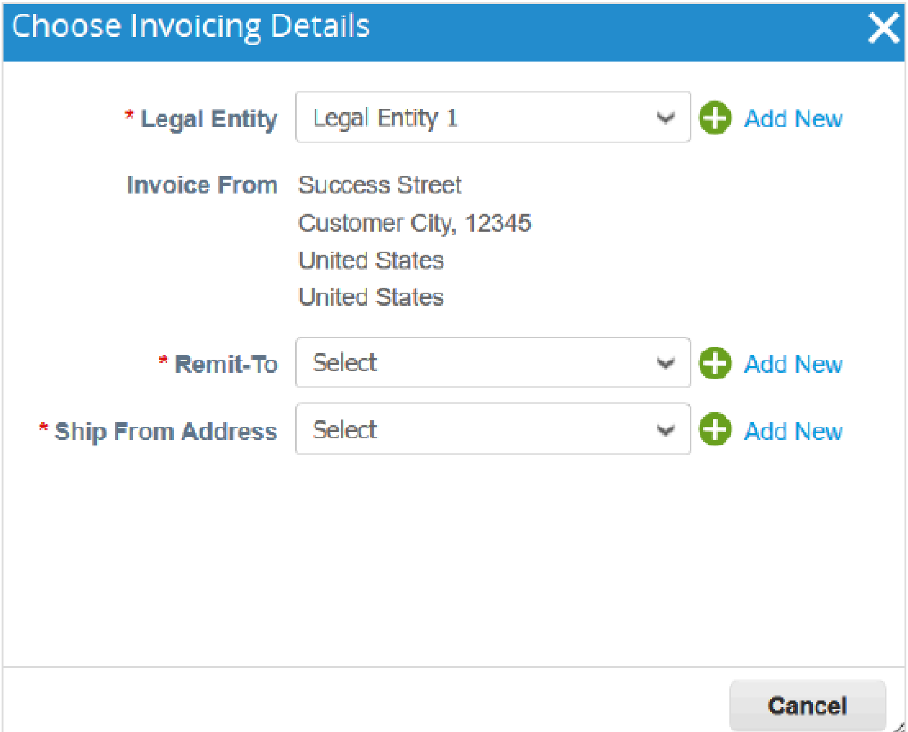
- Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button.



3. Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address.

   When you select a legal entity, the popup displays the **Invoice From** addresses available for the legal entity and information about how your customer(s) associated with the legal entity can pay you, for example, "This customer can pay you by Bank Account or Credit Card."

In case of multiple payment types, you might see multiple **Remit-To** and **Ship From** addresses for the different payment types. To accept a new payment type, you might need to add a new remit-to type.

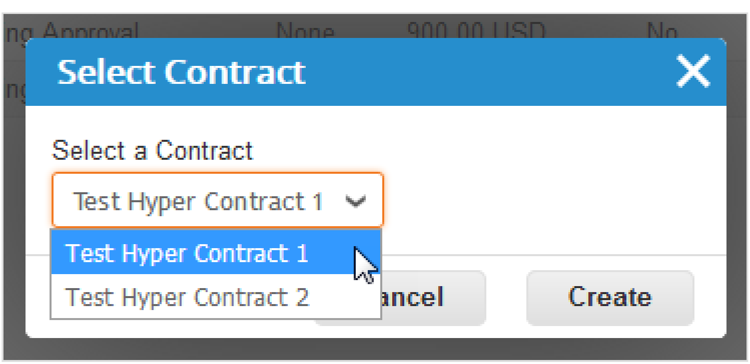


If you do not have a legal entity, you need to add one by clicking on the **Add New** link or on the add/plus () icon.
You are guided through creating your legal entity. For more information, see [Set up Legal Entities](#).
The selected or newly created legal entity is added to your invoice.

4. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO. For more information, see [Edit an invoice](#).

Create an invoice from a contract

1. Click on the **Create Invoice from Contract** button above the **Invoices** table on the **Invoices** page and select the relevant contract from the drop-down list.



2. Create a new or choose an existing invoice-from address. See step 3 in Create an invoice from a PO.

3. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. For more information, see Edit an invoice.

Create a blank invoice

1. Click on the **Create Blank Invoice** button above the **Invoices** table on the **Invoices** page.

2. Create a new or choose an existing invoice-from address. See step 3 in Create an invoice from a PO.

3. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. For more information, see Edit an invoice.

Create a credit note

You can issue a credit note to:

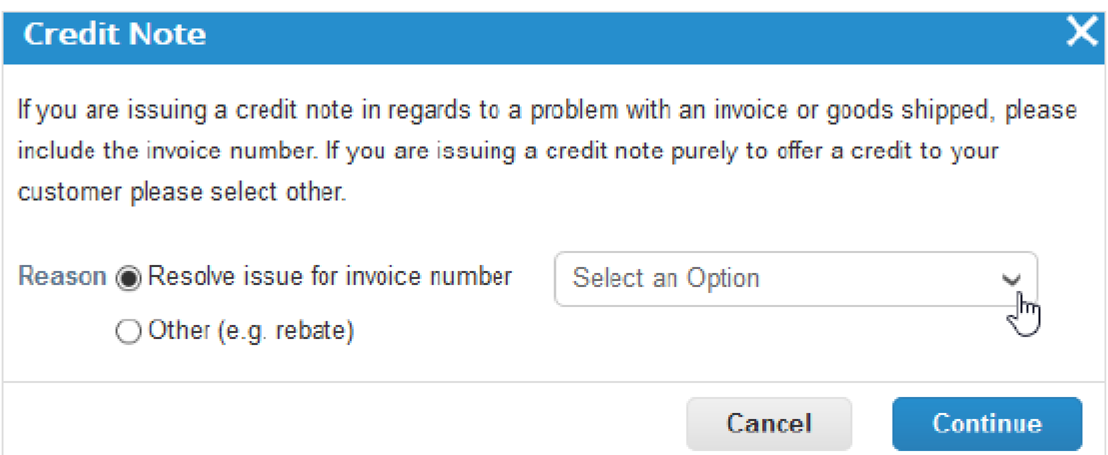
- Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice. For more information, see Disputed invoices.

- Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

To create a credit note:

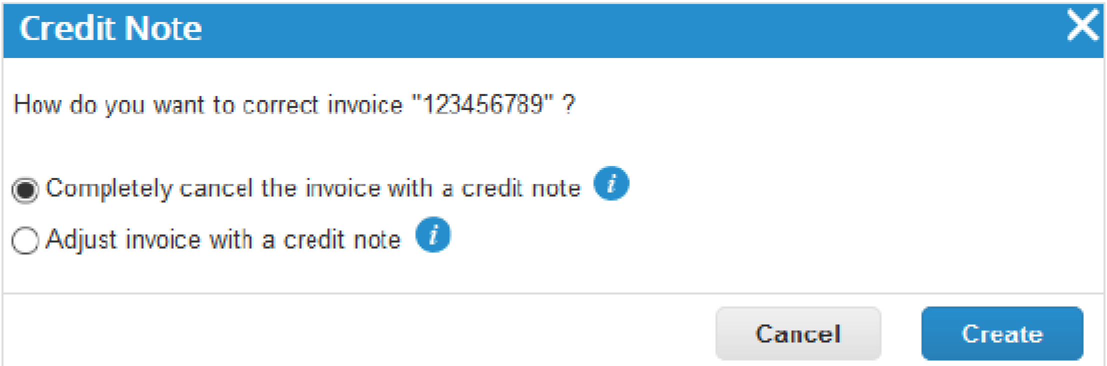
1. Click on the **Create Credit Note** button above the **Invoices** table on the **Invoices** page or, on the **Orders** page, click on the **Create Credit Note** () icon for the PO in the **Actions** column of the **Purchase Orders** table.

2. In the appearing **Credit Note** popup, select the reason for your credit note.



- Resolve a dispute

  If the credit note is related to a problem with an invoice or the goods shipped, select the **Resolve issue for invoice number** radio button and, from the drop-down list, select the invoice number. Click **Continue** to select how you want to resolve the issue.

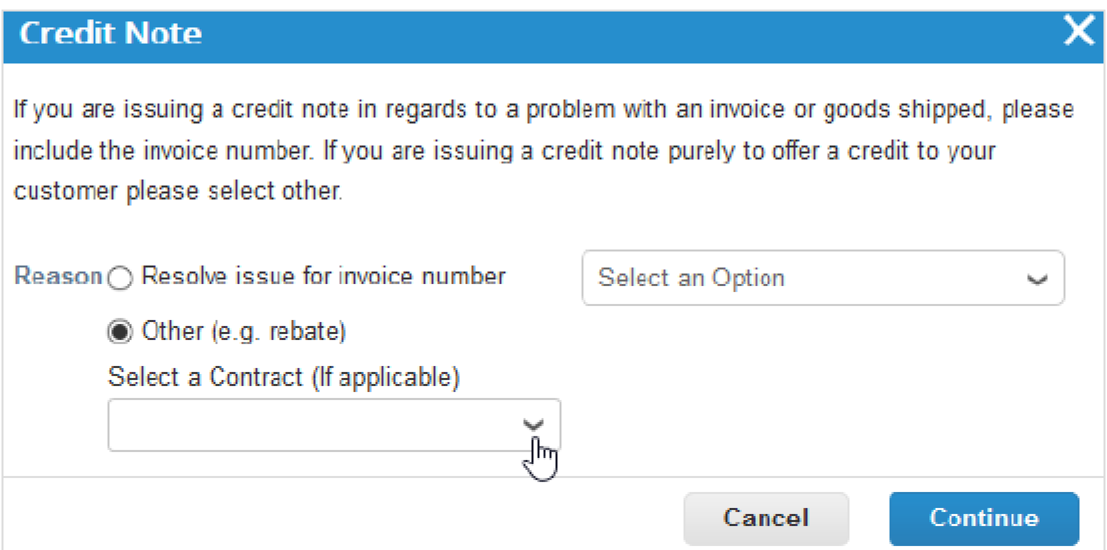


You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it. For more information, see [Disputed invoices](#).

> **Note:** Only quantity or price can be reduced through partial credit notes.

- Record a credit

  Select **Other** and click **Continue.** If a contract is available, you can also select it from the drop-down list.



Create the credit note similarly to creating an invoice. For more information, see [Edit an invoice](#).

If you completely cancel the invoice, you can edit the following fields: **Credit Note Number**, **Credit Note Date**, **Supplier Note**, and **Discount Amount**. You can also add attachments (file, URL, or text) and an **Image Scan**, and modify PO lines, the UNSPSC, and tax reason descriptions. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.

If you adjust the invoice, you can also edit the price or quantity. Line level taxes are carried over from the invoice and are prorated based on the credit amount.

> **Note:** Header level charges (for example, shipping, handling, miscellaneous, or header level tax) are not brought over from the original invoice. To provide a credit for header level charges, you need to submit a separate stand-alone credit note.

If you selected **Other**, you are asked to create a new or choose an existing invoice-from address before editing the invoice. See step 3 in Create an invoice from a PO.

Edit an invoice

Fill in at least the mandatory fields (marked with a red asterisk) in your invoice.

If you create or edit a credit note or a PO-backed invoice, some of the fields are pre-populated with information from the original invoice or the PO.

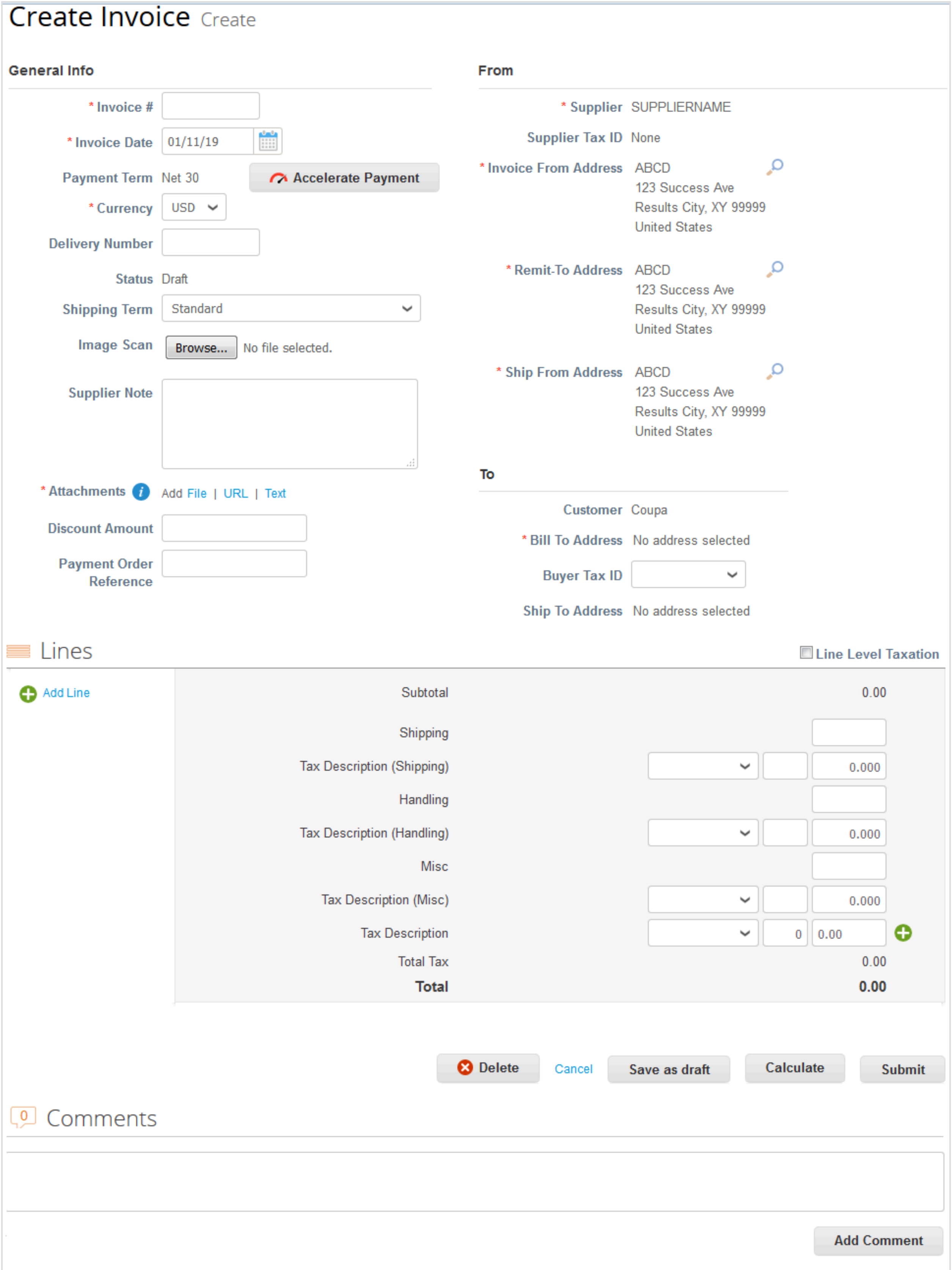
Depending on your customer's settings, you might be required to accept the PO and the following restrictions might apply to the corresponding invoice:

- **Currency** – Cannot be changed from PO currency.
- **UOM** – Cannot be changed from PO line UOM.
- **Price** – Cannot be changed from PO line unit price.
- **Quantity** – Can be changed from 0 to the remaining quantity on the PO line.
- **Amount** – Can be changed from 0 to the remaining amount on the PO line.

These restrictions do not apply to credit notes.

To edit a draft invoice, do one of the following:

- Click on the **Edit** ( ) icon for the invoice in the **Invoices** table.
- Click on the **Invoice #** link to open the invoice and click on the **Edit** button.

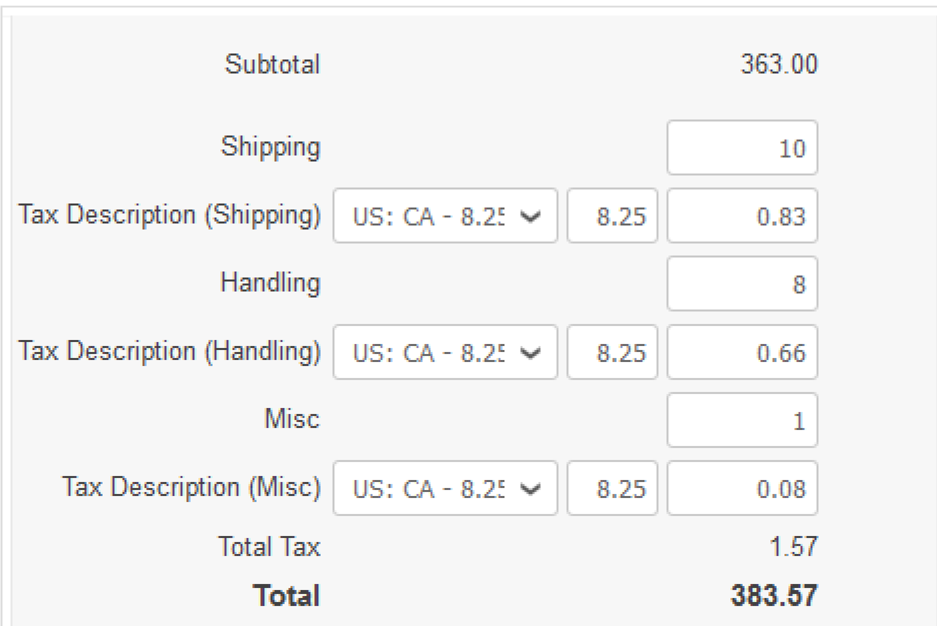


Fill in at least the mandatory fields (marked with a red asterisk). You can create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding **Search** (magnifying glass) icon in the **From** section. You are guided through creating your legal entity. For more information, see Set up Legal Entities.

You can also attach files to an invoice using **Image Scan**. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

In the **Subtotal** section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

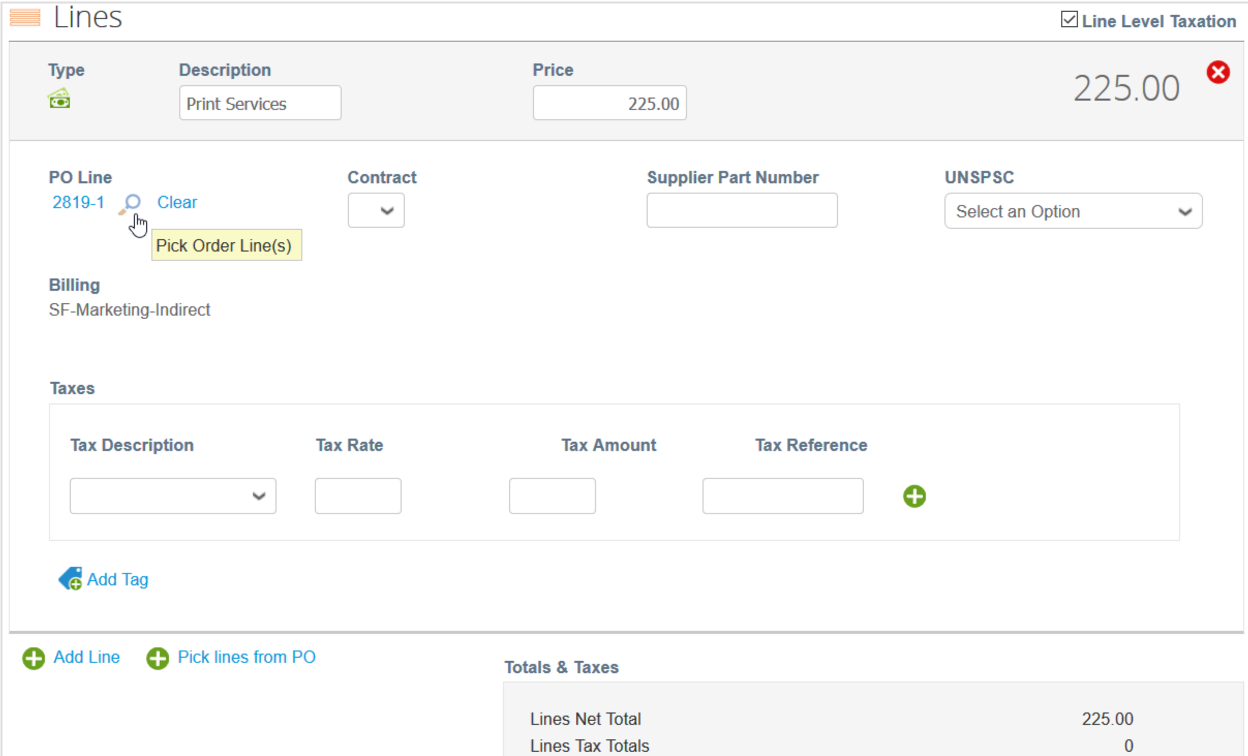
Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.



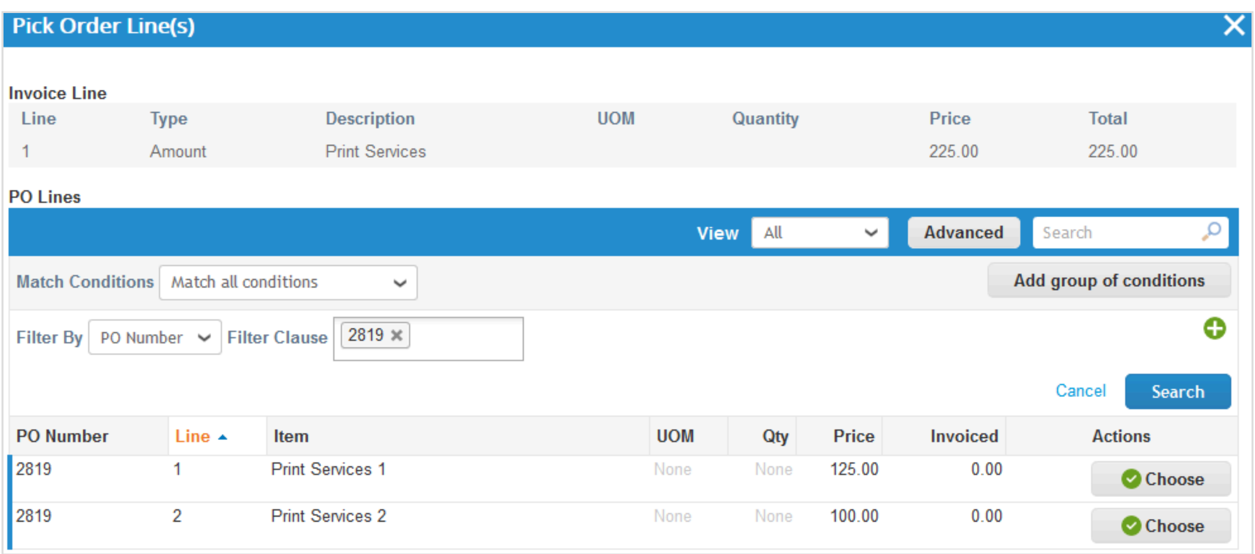
Clicking **Calculate** will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the **Add Line** link or the **Add** () icon next to it.

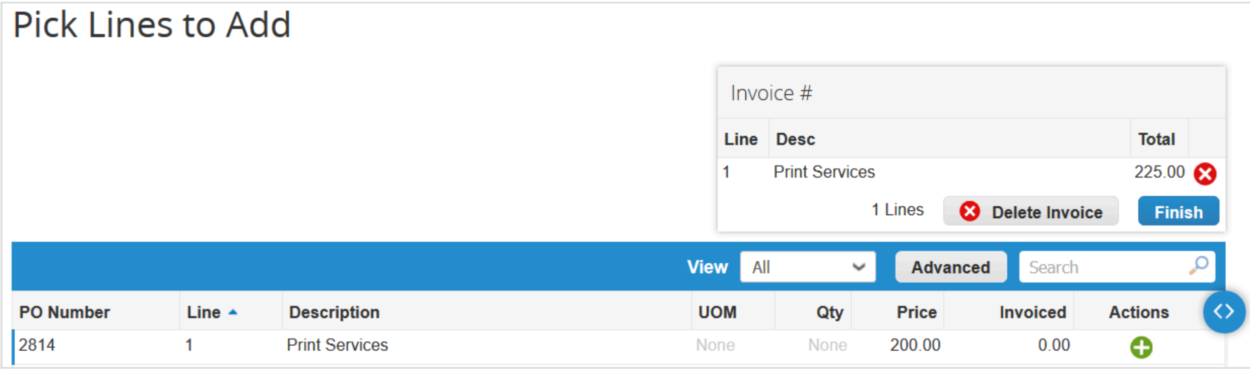
Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.



If you create an invoice from a PO and your customer allows you to pick lines from POs (enabling you to reference multiple POs on one invoice) and update/correct PO references on invoice lines, you can **Clear** PO lines and select PO lines from invoices by clicking on the **Pick Order Line(s)** magnifying glass ( ) icon. In the appearing **Pick Order Line(s)** popup, **Choose** the PO line that you want to be mapped to your invoice line.



You can also add PO lines from other open orders by clicking on the **Pick Lines from PO** link or the **Add** ( ) icon next to it. In the appearing **Pick Lines to Add** popup, click on the **Add** ( ) icon in the **Actions** column for the order line that you want to add.



Invoices associated with digital checks and bank transfers are populated with the following payment information: invoice paid or not, payment date and number, amount paid, and payment notes. For more information, see View and Download Digital Checks.

Submit the invoice or save it as a draft to submit it later. You can also add comments for your customer.

When you try to submit an invoice that does not meet your customer's requirements, depending on your customer's settings, you might get the following warning message: "This invoice has the following warning(s):", followed by details on what to correct.

Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

Note: If you want to make changes to the invoice after submitting it, you have to contact your customer

Create or Edit a Catalog

To create a catalog for a customer, go to the **Catalogs** page, select the customer from the **Select Customer** drop-down list in the top right corner, and click on the **Create** button.

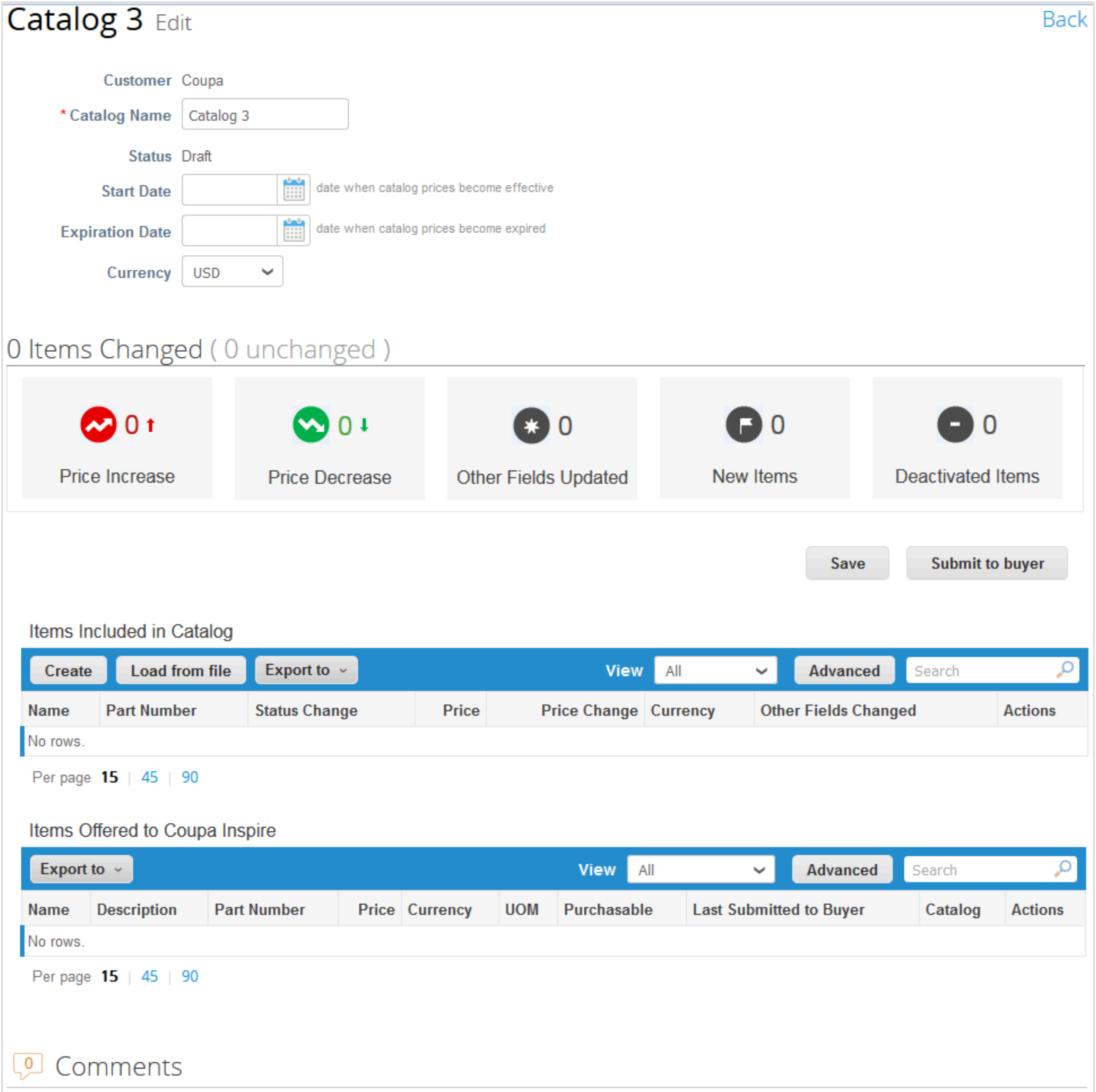
To edit a draft catalog, do one of the following:

- Click on the **Edit** ( ) icon for the catalog in the **Catalogs** table.
- Click on the **Catalog Name** link.

On the **Catalog Edit** page, fill in at least the mandatory field (marked with a red asterisk).

You can change the default catalog title ([Your Company Name] Catalog [Number]) in the mandatory **Catalog Name** field.

You can select a start and expiration date for your catalog and a currency to be applied to your catalog items.



You can create as many catalogs as you want, but each catalog must be approved by your customer before it can be included in Coupa search results.

Item changes

The **n Item(s) Changed** section provides information on changes that your customer made to the catalog:

Item Changes	Description
n Items Changed (n Unchanged)	Total number of items that changed and did not change.
Price Increase	Total number of items in the catalog that increased in price. New items do not

Item Changes	Description
	appear in this count.
Price Decrease	Total number of items in the catalog that decreased in price. New items do not appear in this count.
Other Fields Updated	Total number of items that were modified in a way other than a change in price.
New Items	Total number of new items included in the catalog since the last upload or creation of new items.
Deactivated Items	Total number of items that are no longer available in the catalog or search within Coupa.

If you accept the changes, click **Submit to buyer** to have your customer approve the catalog for inclusion in their Coupa environment.

When you submit your catalog, your can see the following message in the green notification bar: "Catalog was submitted and buyer will be notified."

You can also add comments for your customer. After your catalog is accepted, you cannot edit it. Instead, you have to change or update it by submitting a new verison.

Items included in catalog

This table lists all the items included in this catalog. They are not available in Coupa until the catalog is approved by your customer. Once approved, the items are also listed in the **Items Offered to [Customer Name]** table below.

If the items included in the catalog match items already offered, any status, price, or other field changes are listed in the table.

Status Change	Description
New	The item is new, and has not been offered to this customer before. If the item is listed in **Items Offered to [Customer Name]**, make sure the part number is correct since this is the unique identifier.
Updated	The item has been updated and something has changed.
Deactivated	The item is no longer available for purchase.

You can also update catalog items. For more information, see Create or Edit Catalog Items.

Items offered to [Customer Name]

This table lists all the items that have been accepted and published in the customer's Coupa environment.

> **Note:** Unlike **Items Included in Catalog**, which can be deleted before submitting the catalog for approval, **Items Offered to [Customer Name]** cannot be deleted. Once an item is accepted and published, it cannot

> be deleted, only deactivated.

You can export the tables of included and offered items in CSV or Excel format.

You can filter the tables by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

Create or Edit a Service/Time Sheet

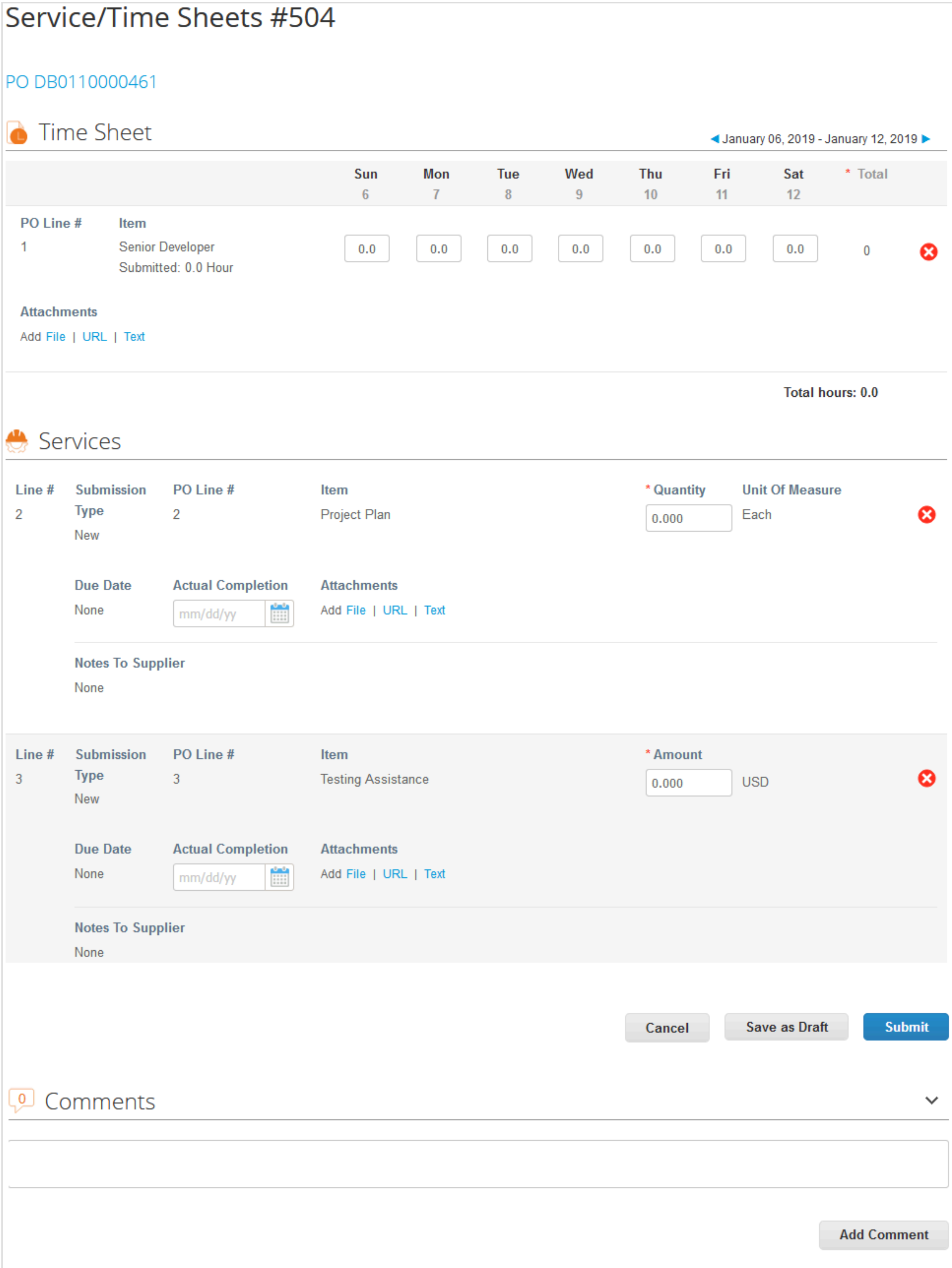
Note: The Service/Time Sheets feature is available only if your customer enables it for you. You also have to enable it for the CSP user(s) on the **Admin** page.

When you receive a purchase order, you can flip it into a service/time sheet by clicking on the icon in the **Actions** column of the **Purchase Orders** table or on the **Create Service/Time Sheets** button on the PO. For more information, see View and Manage POs.

To edit a service/time sheet, perform the following steps:

1. On the **Service/Time Sheets** page, do one of the following:
   - Click on its number in the **Service/Time Sheets** column and click on the **Edit** button.
   - Click on the **Edit** ( ) icon for it in the **Actions** column.

   Tip: You can also edit a service/time sheet by clicking on its number on the **Service/Time Sheet Lines** page.



2. Confirm or enter time, quantity, and/or amount against the PO line items.

> **Note:** You can enter only one week at a time. The week applies to all the lines.

3. Save or submit the service/time sheet, or add comments for your customer.

> **Note:** You can submit multiple service/time sheets for any amounts or quantities against one PO and against one PO line.

The service/time sheet is routed for approval to your customer.

Approval or rejection can happen on the entire PO or on individual PO lines. Your customer can accept and pay you for partial work and you can see which service/time sheet lines are approved, pending approval, need rework, or are discarded.

If the service/time sheet or one or more of its lines are approved, a receipt and an inventory transaction are created in Coupa for the values of each PO line and you get a notification.

If the service/time sheet or one or more of its lines are rejected, you receive a notification of the required rework and you have to submit the service/time sheet again. The type of notification depends on your notification preference settings.

To delete, withdraw, or edit a service/time sheet, click on the relevant (**Delete**, **Edit**, or **Withdraw**) icon in the **Actions** column.

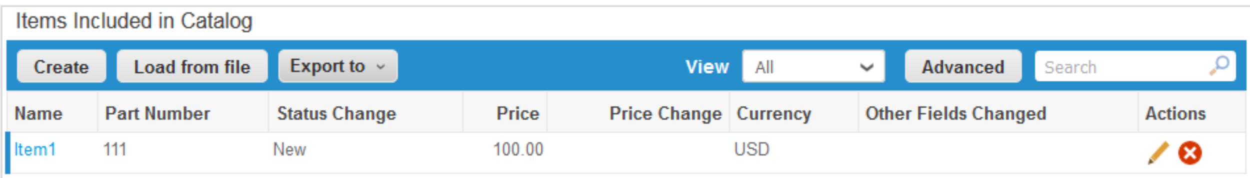
> **Note:** You can edit or delete only draft service/time sheets. You can withdraw service/time sheets only in pending approval status.

Create or Edit Catalog Items

On the **Catalog Edit** page, you can create or modify items one-by-one or with the bulk loader.

Create or update an item

In the **Items Included in Catalog** table, click on the **Create** button to add a new item or on the **Edit** icon ( ) to edit a saved item.



On the **Catalog Item Create** page, fill in at least the mandatory fields (marked with a red asterisk).

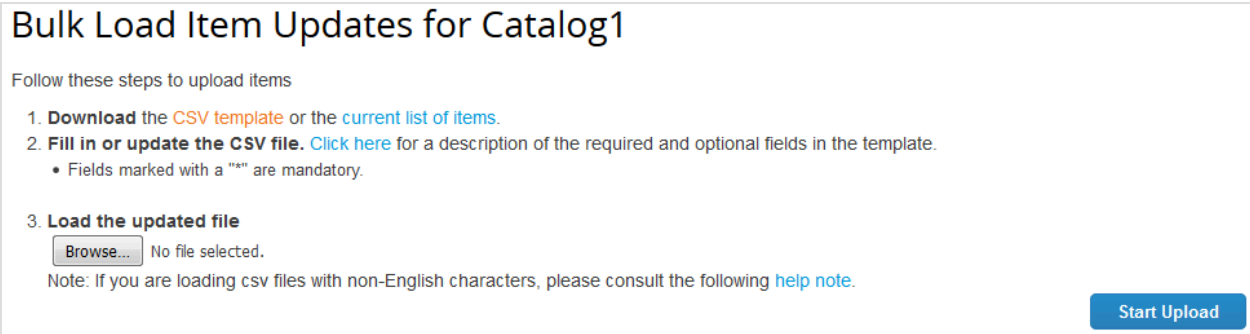
Setting on UI	Column in the CSV Template	Description
*Name	Name*	The item name that Coupa displays in search results.
*Description	Description*	The item description that Coupa displays in search results. Coupa also searches this description for any of the keywords searched for.
*Unit of Measure	UoM Code*	The UoM you use must match the UoM your customer has already set up in their Coupa environment; otherwise, you will not be able to save or load items. Talk to your customer to make sure that all the units of measure you use are set up in Coupa. ISO standard is preferred.
Purchasable	Active*	Catalog items cannot be deleted, so if an item is no longer available, deselect this checkbox to prevent the item from being visible in catalogs and search results. If the value for "Active" is "Yes", the item can be purchased. If "No", the item cannot be purchased.
Supplier Item Attributes		
*Part Number	Supplier Part Num*	The unique identifier for the item in the catalog database. Usually the supplier part number. It may be different from the Manufacturer part number.
Auxiliary Part Number	Supplier Aux Part Num	Another part number that helps identify the item, for example, a quote number. It will be included in any purchase order.
Manufacturer		The name of the item's manufacturer.
Lead Time	Lead Time	The time between when you receive the purchase order and when you ship the item.

Setting on UI	Column in the CSV Template	Description
		Enter a single value not a range.
UNSPSC Code	UNSPSC Code	This is the United Nations Standard Products and Services Code® (UNSPSC®). For more information, see www.unspsc.org. Standard classification code that best describes the item. If UNSPSC is not available at the item level, assign a Segment or Family classification code that most applies to the item. If acceptable to your customer, a single Segment may be used for all items in your catalog.
Contract		You can specify the customer contract (if any) associated with the item.
Pricing Type		Limited to Fixed Price.
*Price	Price*	The price of the item you are selling to your customer. Do not include a currency sign, for example, $, or any punctuation other than a decimal separator.
*Currency	Currency*	The currency is determined at the catalog level. The currency selected for the catalog is the default currency selected when you create a new catalog item. Use ISO Currency Codes, for example, USD.
Savings %		If you offer a discount off retail price, you can indicate the savings percentage here. This is for reference only, and it does not affect the selling price or invoicing.
Browse	Image URL	You can also upload an image for your item by clicking **Browse**. Coupa displays this image in your search results. You can use any image that fits on a regular screen. The image is scaled to 64x64 for search result thumbnails, and 300x300 for the detailed view. Coupa shows full resolution when the user zooms in on the image. In CSV, enter the fully qualified URL to the image file (not the containing page).
	Pack Quantity	The number of items included in the specified UoM. For example, if the item UoM is BX and describes a box that contains 100 items, then the Pack Quantity is 100.

Upload or update multiple items

You can use the bulk loader to add or update multiple items in a catalog.

In the **Items Included in Catalog** table, click on the **Load from file** button and follow the steps on the **Bulk Load Item Updates for [Catalog Name]** page.



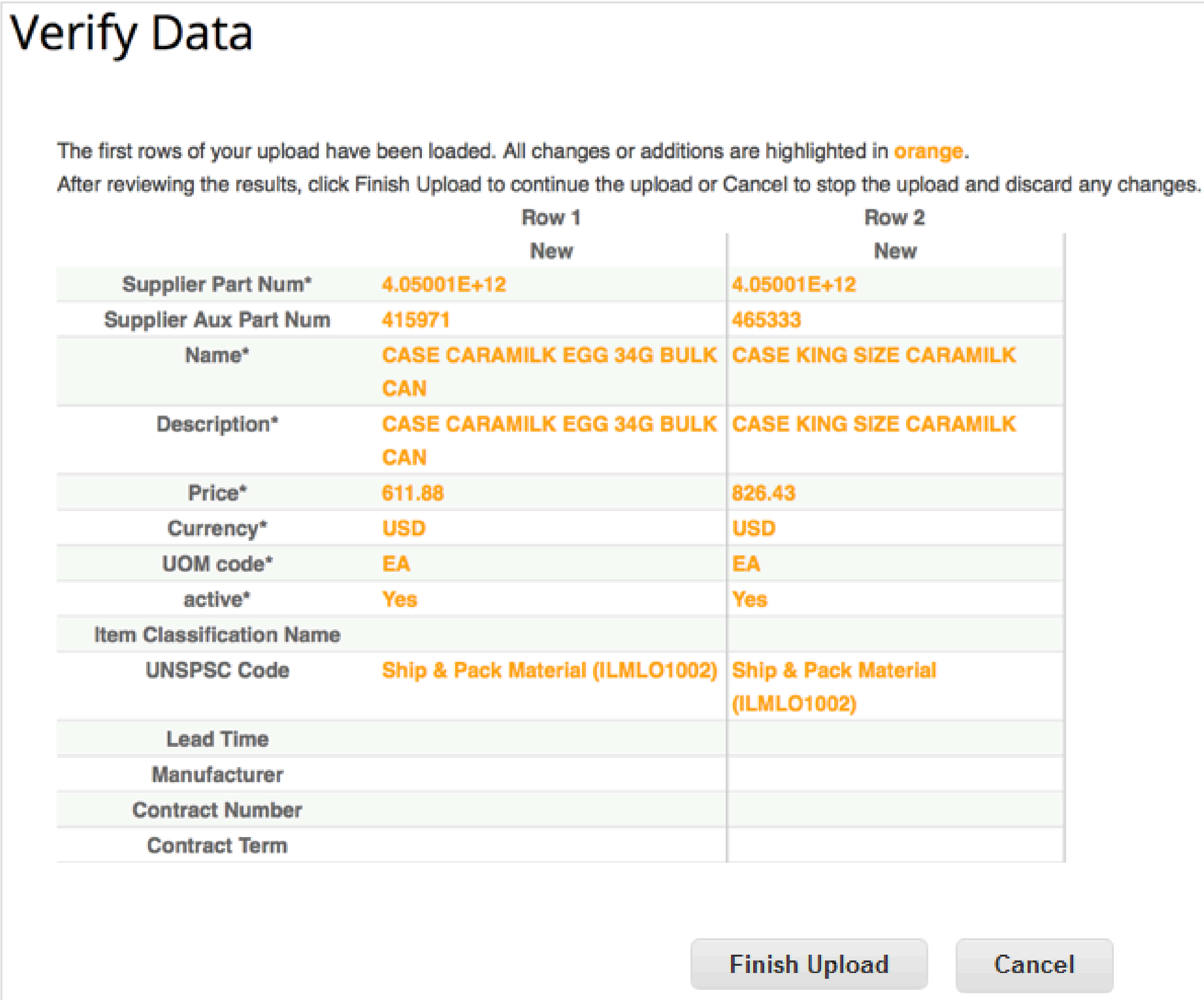
- To get a blank CSV file to build your new catalog, click on the **CSV template** link. For information on the fields to be filled in, see the table above.
- To add or modify items from your existing catalog, click on the **current list of items** link.

After making the changes, click on the **Browse...** button and navigate to your modified CSV file, click **Open**, and then **Start Upload**.

> **Note:** Do not change the column header names in the `.csv` file.

Once the upload is complete, Coupa checks your file and shows you the **Verify Data** screen where you can check your changes and **Finish Upload**. All changes are highlighted in orange.

Click **Cancel** if you need to correct data in the .csv file, and then upload it again.



Verify Data

The first rows of your upload have been loaded. All changes or additions are highlighted in orange.
After reviewing the results, click Finish Upload to continue the upload or Cancel to stop the upload and discard any changes.

	Row 1	Row 2
	New	New
Supplier Part Num*	4.05001E+12	4.05001E+12
Supplier Aux Part Num	415971	465333
Name*	CASE CARAMILK EGG 34G BULK CAN	CASE KING SIZE CARAMILK
Description*	CASE CARAMILK EGG 34G BULK CAN	CASE KING SIZE CARAMILK
Price*	611.88	826.43
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes
Item Classification Name		
UNSPSC Code	Ship & Pack Material (ILMLO1002)	Ship & Pack Material (ILMLO1002)
Lead Time		
Manufacturer		
Contract Number		
Contract Term		

Finish Upload Cancel

After clicking **Finish Upload**, wait for the system to complete loading the items. You can see the status of the upload change from **Submitted for Processing** through **Submitted to Resque** to **Loading** and **Upload completed successfully**. Click **Done**.

The **n Item(s) Changed** section is updated with your changes.

Edit a PO

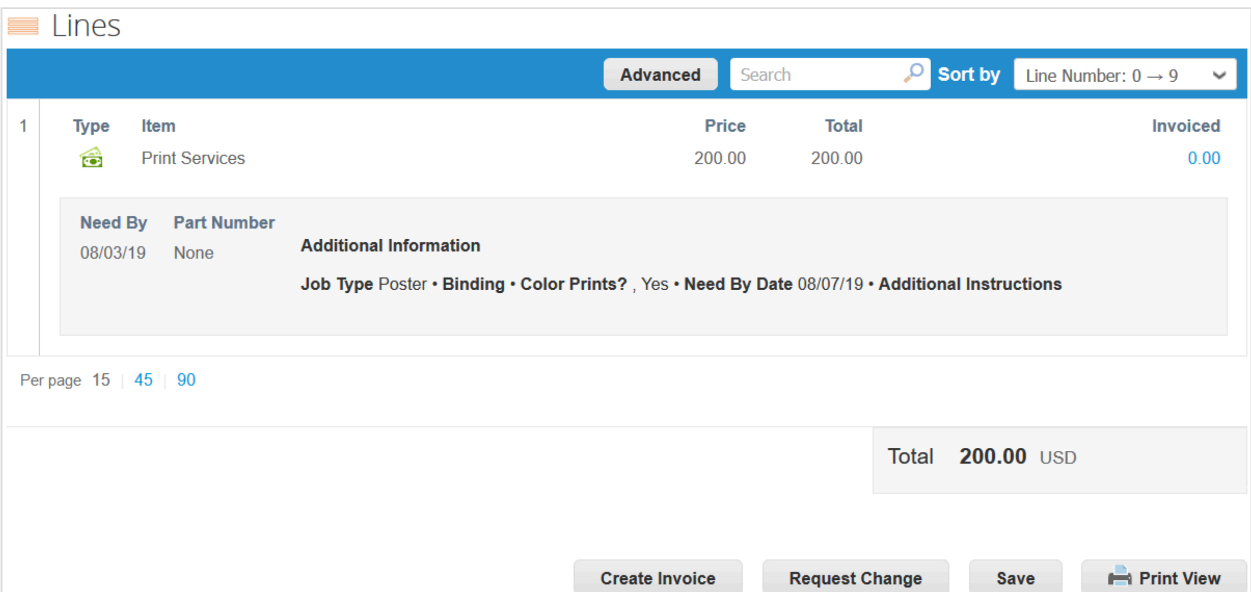
Request PO changes

> **Note:** You can request PO changes if your customer allows you to submit PO change requests and you have the Order Changes permission. For more information, see Manage Users.

You can request changes to POs created in Coupa and submit them for approval to your customer. You cannot request changes to closed or soft-closed POs or PO lines.

Click on the **Orders** tab on the main menu, and on the appearing **Purchase Orders** page, click on the number of the PO that you want to modify.

At the bottom of the purchase order, click on the **Request Change** button. If you have saved but not submitted your change request, click on the **Edit Change** button.



You can edit the fields that your customer allows you to change, for example, **Ship to User**, **Department**, and **Estimated Arrival Date** on the order, and **Need by Date**, item **Qty/Amt**, and **Price** on an order line. You can also delete PO lines that cannot be fulfilled.

> **Note:** You cannot reduce the quantity/amount below the values already received or invoiced against.

You need to select a **Reason for Change** from the drop-down list:

- Cannot fulfill order quantity/amount
- The ordered item is no longer available

- Cannot fulfill orders by the Need-by date
- Other - In this case, you also need to provide a comment.

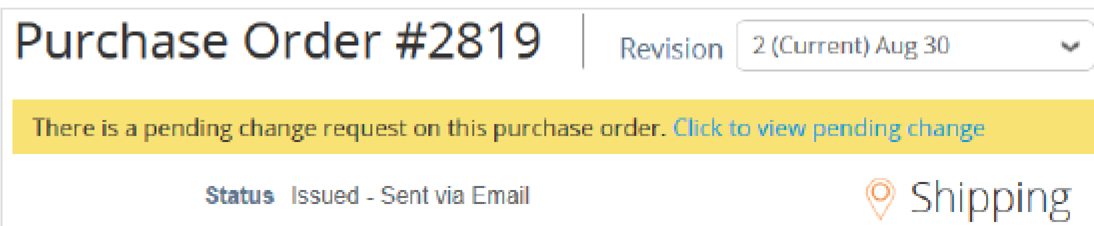
Cancel, **Save**, or **Submit** the change request.

At the bottom of the page, you can also add comments for your customer.

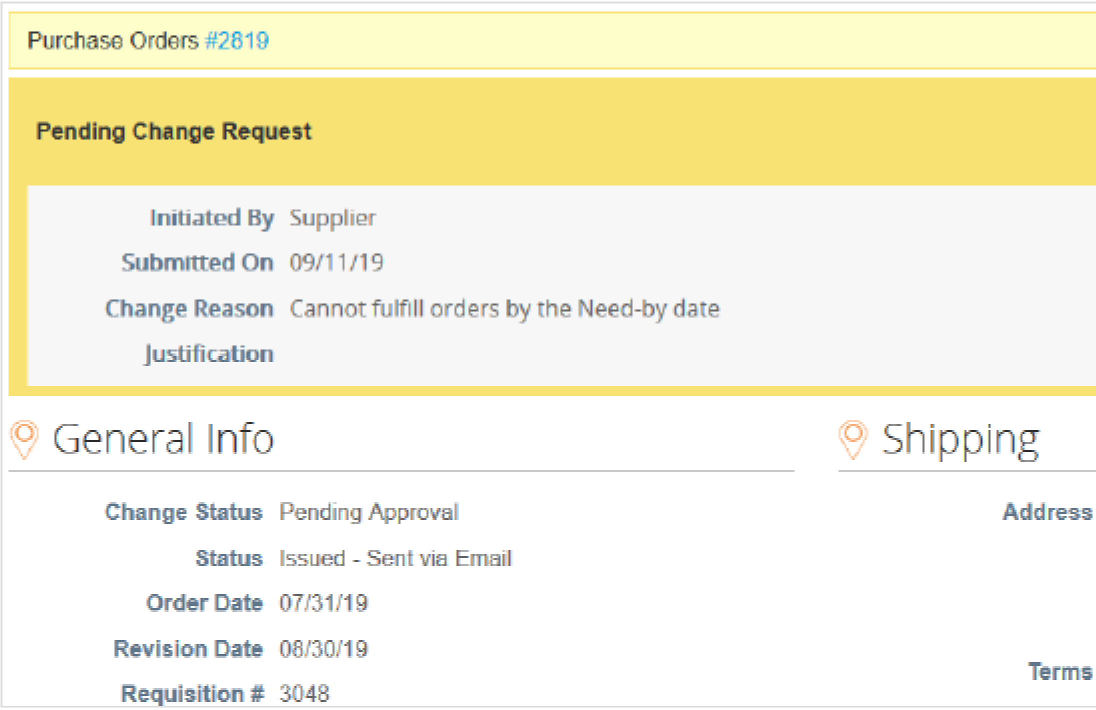
> **Note:** Only one change request can be pending approval at a time. You cannot submit a PO change request while your customer has a change pending approval.

Changes are effective when a change request is approved. When a PO change request is rejected, you receive the **Order change request is rejected** notification. For more information, see View and Manage Notifications.

After submitting your change request and while waiting for your customer's approval, you can view the pending changes if you **Click to view pending change** at the top of the PO. You can also select a PO revision to view by clicking the drop-down list next to the PO number.



When viewing pending changes, the Pending Change Request page shows the PO number, the revision date, the date when the change request was submitted, the reason for the change, change status, change type, and more.



You can withdraw your change request by clicking **Withdraw** at the bottom of the page.

On the **Order Changes** and **Order Line Changes** tabs, you can see tables listing all your PO and PO line changes.

Column	Description
Purchase Order Changes	
PO Change #	PO change number generated by Coupa. Click on it to view the PO change.
Order #	PO number generated by Coupa. Click on it to view the PO.
Version #	PO revision number generated by Coupa.
Ship to User	Name of the user to whom the item/service needs to be shipped/delivered.
Status	Status of the PO change: draft, pending approval, or approved. If a PO change request is rejected and you view the PO change, it moves into draft for you to edit and resubmit it. A PO change request status changes to draft also when you withdraw it.
Items	Item(s) or service(s) on the PO.
Total	Total price of the item(s)/service(s) on the PO.
Supplier Initiated	Indicates whether the PO change was initiated by you/supplier (change requests in draft or pending approval status). Approved change requests are not initiated by suppliers.
Created By	Name of the user that created the change request.
Reason Code	Shows the **Reason for Change** as selected from the drop-down list: Cannot fulfill order quantity/amount, The ordered item is no longer available, Cannot fulfill orders by the Need-by date, or Other. If you select other, you need to provide a comment.
Justification	Shows the comment provided along with the reason for change.
Purchase Order Line Changes	
PO Change #	PO change number generated by Coupa. Click on it to view the PO change.
Order #	PO number generated by Coupa. Click on it to view the PO.
Line #	PO line number.
Line Type	Line type: quantity or amount.
Supplier	Supplier name.
Account	Billing account code.
Chart of Accounts	Name of the chart of account.
Commodity	Commodity name.
Item	Item name.
Item #	Item number.
Marked for Deletion	Indicates if the PO line is marked for deletion.

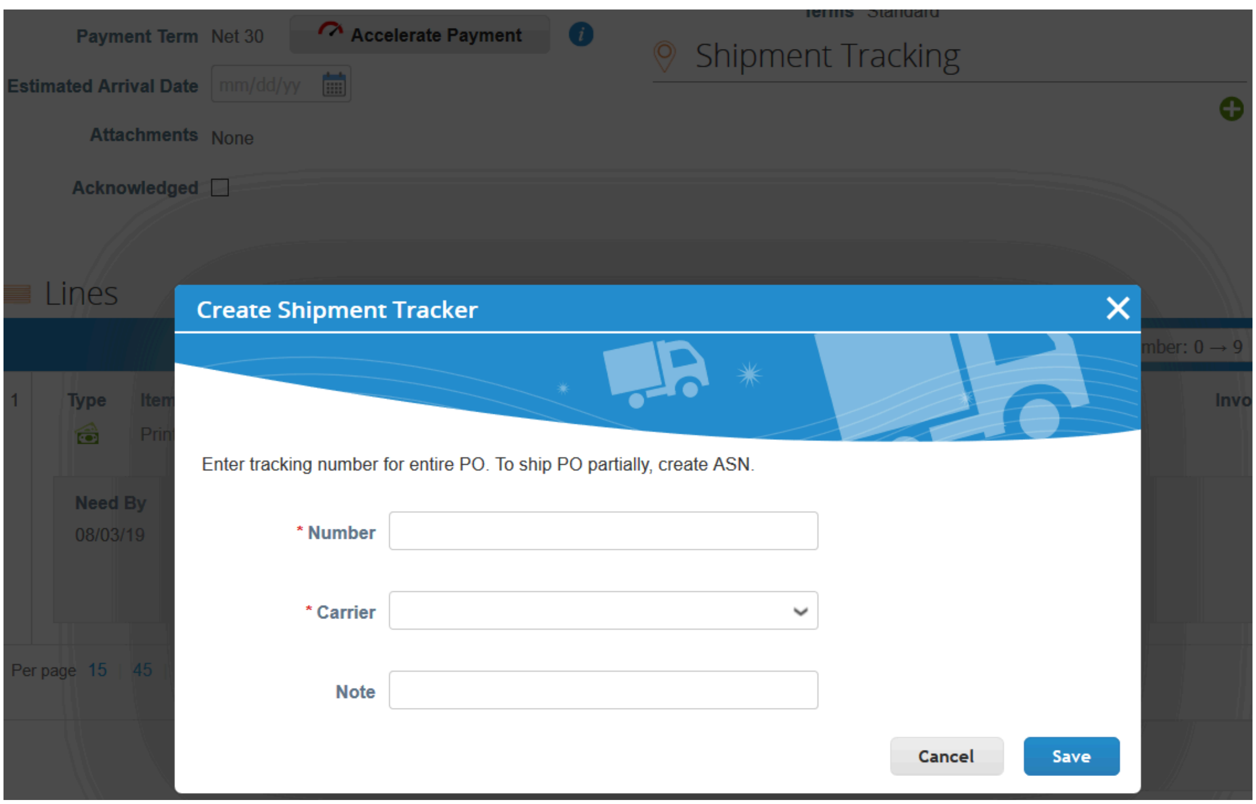
You can filter both tables by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. The **Purchase Order Changes** table has the **Change orders initiated by suppliers** and **Pending approval order changes** built-in filters, and the **Purchase Order Line Changes** table has the **Pending approval order line changes** built-in filter. For more information, see Create Custom Views.

Add shipment tracking information

> **Note:** You can add shipment tracking information to POs if your customer enables real-time shipment tracking.

In the **Shipment Tracking** section in the PO, click on the **Add** ( ) icon. In the appearing **Create Shipment Tracker** popup window, enter the tracking number for the entire PO, select a carrier (FedEx, USPS, UPS) from the drop-down window, and add a note (optional).

> **Note:** You can enter only one tracking number on a PO. For partial shipments, you can create an advance ship notice (ASN).



View and Download Digital Checks

You can accept payment from your customers through digital checks that you can download and print from the CSP.

Tip: If you provide your bank account information, your customers can also pay your invoices through bank transfer.

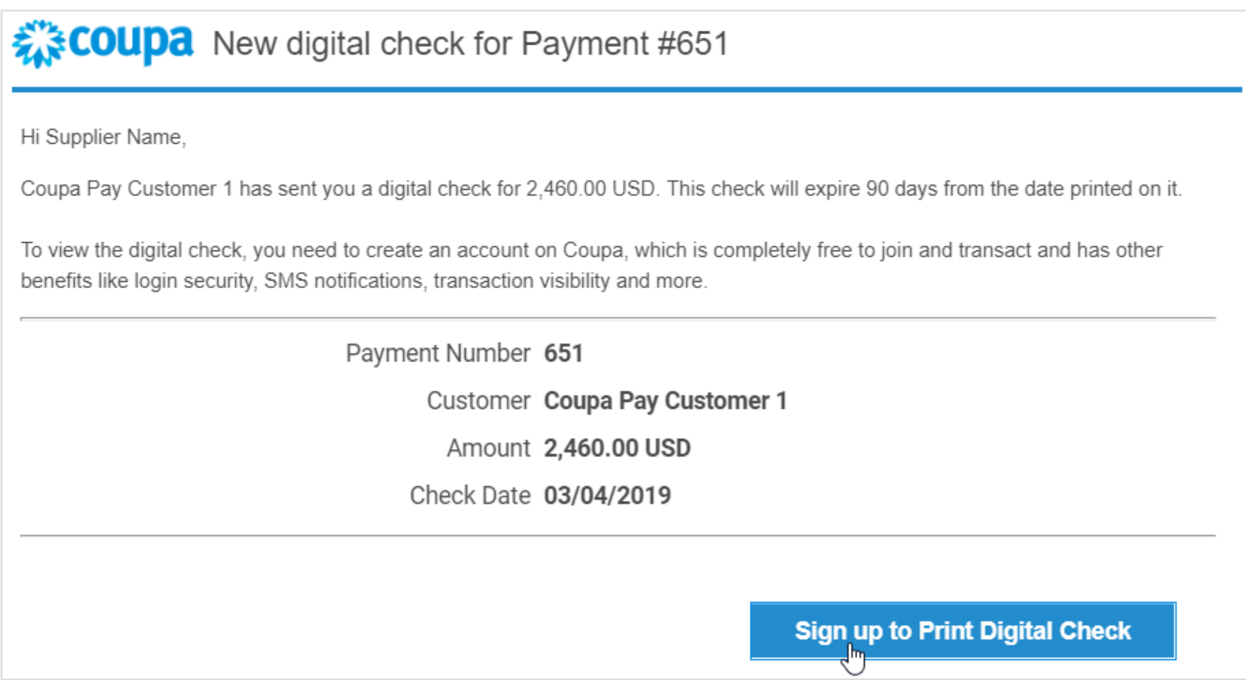
Prerequisites

- You are a US-based supplier.
- Your US-based customers use Coupa Pay.
- You are linked to the CSP. If not linked, you receive an email invitation to register for the CSP.

Notifications

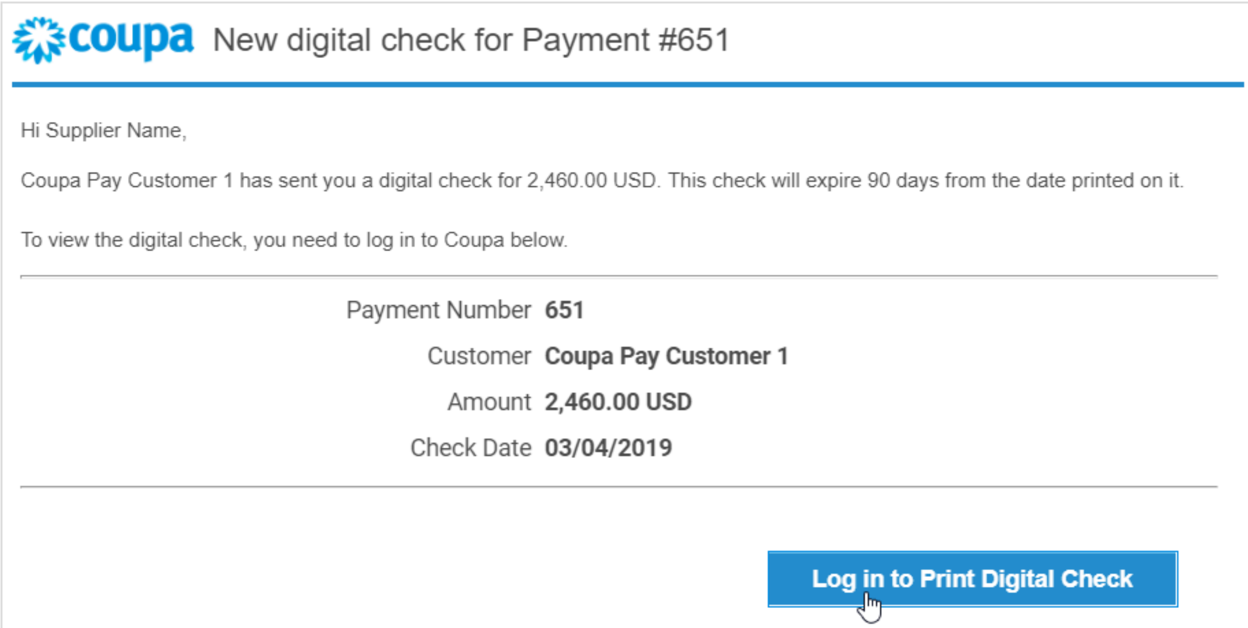
When your customer releases a payment batch for you, the payment moves from **Approved** to **Payment in progress** status and a digital check email notification is sent to the email address of the payee (supplier payment account email) or, if not available, of the primary contact.

If you are not linked to the CSP, your email contains the **Sign up to Print Digital Check** button.



Note: To access the digital check, you need to register for the CSP.

If you are linked to the CSP, your email contains the **Log in to Print Digital Check** button.

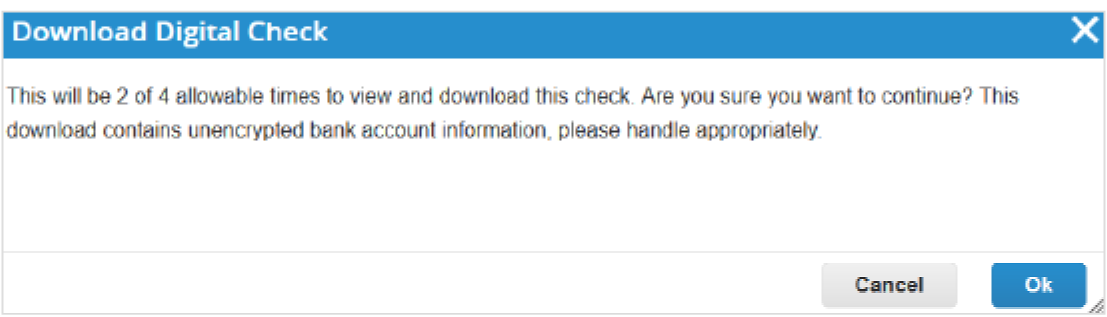


Online and email notifications are on by default, so if you have not turned off your online notification for **Coupa Pay / New digital check**, you also get a **New digital check** online (system) notification in the CSP with the following message: "[Your customer's name] sent you a digital check for [amount] for payment [number]."

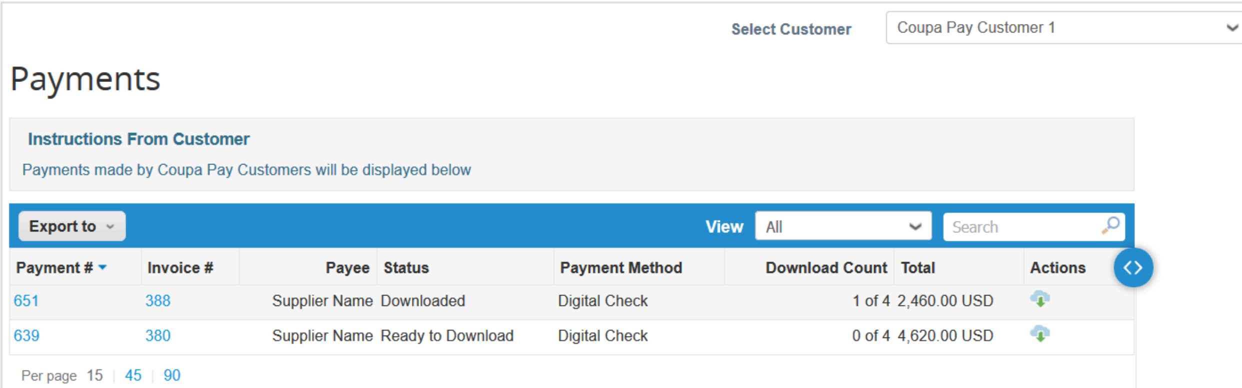
For more information, see View and Manage Notifications.

View and download your digital check

If you are logged in to the CSP and click on the **Log in to Print Digital Check** button, you can see the **Download Digital Check** popup window.



If you are not logged in and click on the **Log in to Print Digital Check** button, you are directed to the **Payments** page.



If you log in to the CSP for the first time after registering or you log in directly (not from the email notification), you are taken to the **Home** page first, so you need to click on the **Payments** main menu item to see all the payments: bank transfers and digital checks.

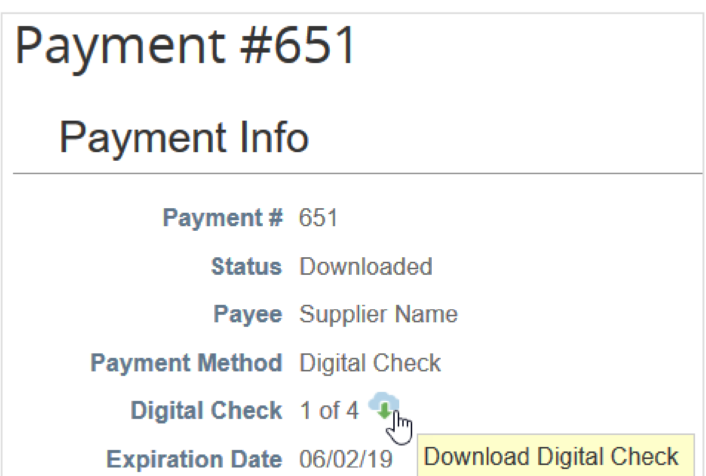
> **Note:** The **Payments** menu item and the **Payments** page are visible only to supplier users with the Payments permission that have at least one Coupa Pay customer. For more information, see Manage Users.

From the **Select Customer** dropdown, select the customer whose payments you want to see.

> **Note:** On the **Payments** page, the **Select Customer** dropdown lists only your Coupa Pay customers.

To download your digital check, you have the following options:

- Click on the **OK** button in the **Download Digital Check** popup window.
- Click on the **Download Digital Check** ( ) icon in the **Actions** column of the **Payments** table.
- Go to the specific payment and download the check directly from the payment.



> **Note:** You can view and download a digital check only four times to prevent, for example, multiple deposits.
>
> You can see how many times you have downloaded a check also in the **Download Count** column of the **Payments** table and in the **Digital Check** field of the **Payment Info** section.

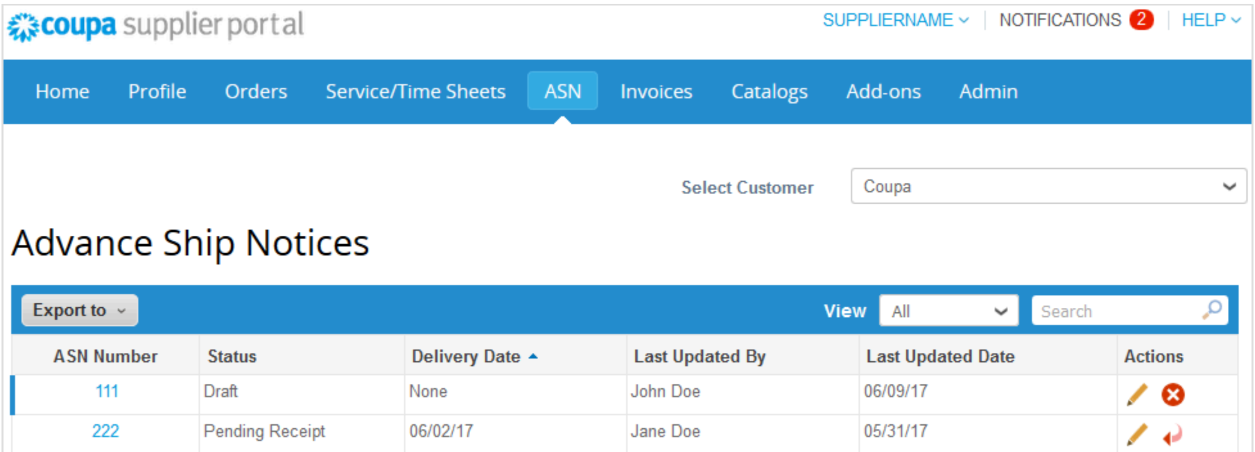
In the appearing window, you can open or save the digital check `.pdf` file, and then print, sign, and deposit it.

Invoices associated with digital checks and bank transfers are populated with the following payment information: invoice paid or not, payment date and number, amount paid, and payment notes.

View and Manage ASNs

> **Note:** This feature is available only if your customer enables it in Coupa.

Click on the **ASN** tab on the main menu. The **Advance Ship Notices** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose ASNs you want to see.

> **Note:** When you visit the page again, it shows you the ASNs for the customer you selected last time.

The **Advance Ship Notices** table shows the following information for all the ASNs you sent to the selected customer.

Column	Description
ASN Number	ASN number generated by Coupa. Click on it to view the ASN.
Status	Current status of the ASN. For more information, see the ASN status list below.
Delivery Date	Date when the ASN was sent.
Last Updated By	Name of the person who updated the ASN for the last time.
Last Updated Date	Date when the ASN was updated for the last time.
Actions	Click on the icons for the following actions: •  - Edit the ASN. •  - Delete the ASN. •  - Cancel the ASN. You can edit ASNs in draft or pending receipt status. You can delete ASNs in draft status. You can cancel ASNs that are pending receipt.

ASNs can have the following statuses:

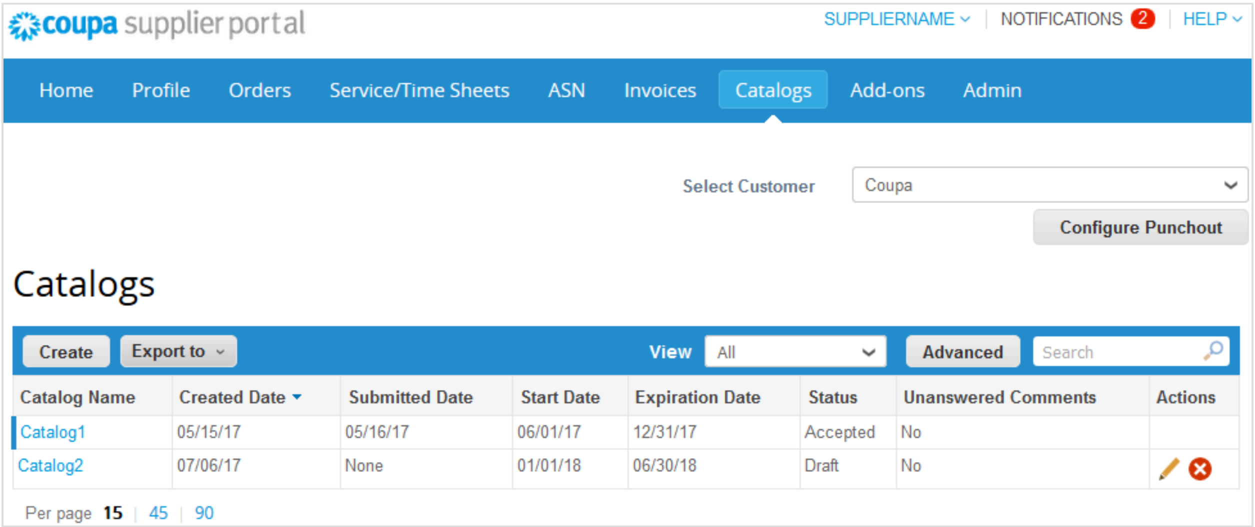
Status	Description
Draft	The ASN has been created, but it has not been submitted to your customer.
Cancelled	The ASN has been cancelled.
Partially Received	The customer has received a part of your shipment.
Pending Receipt	The customer is waiting for the shipment.
Received	The customer has received your shipment.

You can export the ASNs table in CSV or Excel format.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

View and Manage Catalogs

Click on the **Catalogs** tab on the main menu. The **Catalogs** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose catalogs you want to see.

> **Note:** When you visit the page again, it shows you the catalogs for the customer you selected last time.

The **Catalogs** table shows the following information for all the catalogs you created for the selected customer.

Column	Description
Catalog Name	Name of the catalog. Click on it to view the catalog.
Created Date	Date when the catalog was created.
Submitted Date	Date when the catalog was submitted.
Start Date	Date when the catalog becomes effective.
Expiration Date	Date when the catalog expires.
Status	Current status of the catalog. For more information, see the catalog status list below.
Unanswered Comments	Your comments on the catalog for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the customer when you open the catalog.
Actions	Click on the icons for the following actions: • - Edit the catalog.

Column	Description
	• - Delete the catalog. You can edit only draft catalogs. You can delete catalogs in draft or awaiting/ pending approval status.

Status	Description
Accepted	The catalog has been accepted by your customer, and all the items in it are now available for purchase within Coupa.
Awaiting/Pending Approval	The catalog has been received by your customer, but it has not gone through the approval chain yet.
Draft	The catalog has been created, but may be missing information necessary to send it to the customer.
Error	Something is wrong with the catalog. Contact your customer to get the catalog back on track.
Rejected	The catalog has been rejected. Contact your customer to find out why, and then resubmit.

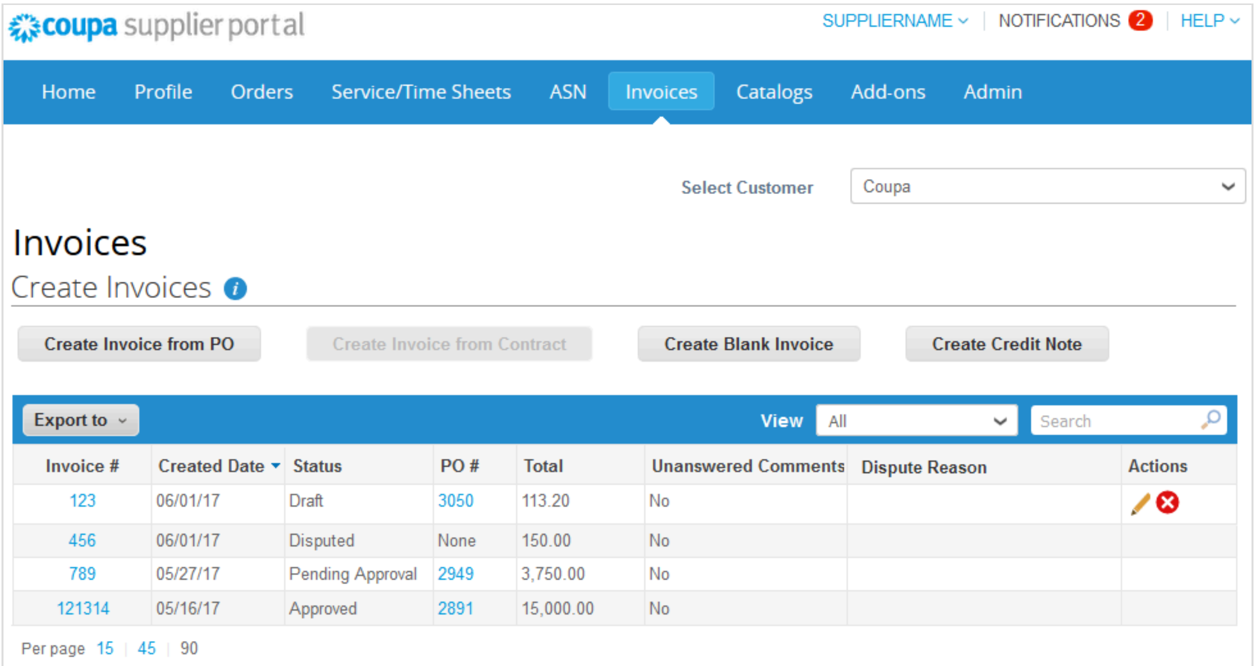
You can export the catalogs table in CSV or Excel format.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

View and Manage Invoices

Note: If you use Coupa's invoice compliance, see Compliance as a Service for more information.

Click on the **Invoices** tab on the main menu. The **Invoices** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose invoices you want to see.

Note: When you visit the page again, it shows you the invoices for the customer you selected last time.

The **Invoices** table shows the following information for all the invoices you sent to the selected customer.

Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Created Date	Date when the invoice was created.
Status	Current status of the invoice. For more information, see the invoice status list below.
PO #	PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO.
Total	Total amount of the invoice. If your customers use country compliant invoicing and enabled the relevant field setting, on legal invoices (PDFs) you can also see the **Totals with Early Payment Discount** section with discounted totals.

Column	Description
Unanswered Comments	Your comments on the invoice for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the customer when you open the invoice.
Dispute Reason	Your customer's reason for disputing the invoice.
Actions	Click on the **Edit** ( ) or Delete ( ) icon to edit or delete an invoice. You can edit or delete only draft invoices.

Invoices can have the following statuses:

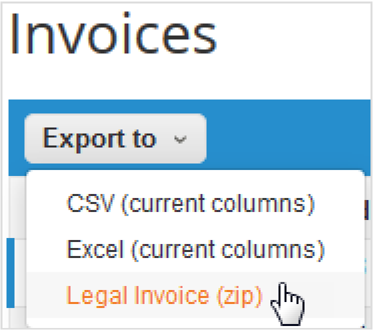
Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	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.

Above the table you can have instructions from the customer specifying, for example, policies or best practices.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

You can export the invoices table in CSV or Excel format.

If your customers use country compliant invoicing, you can also bulk export all the legal invoice attachments (usually PDFs) in a compressed (`.zip`) file by selecting the **Legal Invoice (zip)** option from the **Export to** dropdown.



A green message bar informs you that "The data you requested will be emailed to you shortly."

> **Note:** The export usually takes about one minute. In case of a large number of invoices it may take longer.

There is no limitation on the number of invoices or file size when exporting legal invoices. For more information, see *What does the Export to button do?* in CSP FAQ / Invoices.

> **Tip:** You can set your **Invoices** table view to show and export your legal invoices by status, created date, invoice date, period of time, and so on.

Online and email notifications are on by default, so if you have not turned off your online notification for **Legal Invoice Export Ready**, you also get a notification in the CSP. For more information, see View and Manage Notifications.

> **Warning:** If you turn off notifications for this feature, the `.zip` file is not generated, so you cannot bulk export your legal invoices. You can see a warning in the message bar to enable your notifications.

When you click on the **Download Legal Invoices** button in the email or on the notification in the CSP, the compressed file is downloaded to your device.

> **Note:** If you are not logged into the CSP, you are directed to the **Login** page and you need to go to your notifications to download the file; or after logging in, you can click on the **Download Legal Invoices** button from your email notification again.

> **Warning:** The `.zip` file expires 30 days after you export it. After expiration you cannot download it from your email or online notification.

Disputed invoices

Invoices with disputed status are invoices with information that your customer does not agree to, needs clarification on, or finds incorrect.

When the status of an invoice changes to "Disputed", you receive an email notification with the invoice number, the date of the dispute, the reason for the dispute, and optionally any additional comments. Your customer can leave comments on the invoice while it is in "Disputed" status.

> **Warning:** Your customer does not process disputed invoices for payment until you resolve the dispute.

In the **Invoices** table, click on the invoice number or on the **Resolve** button in the **Actions** column for the disputed invoice that you want to resolve.

To resolve a dispute, click on the relevant button at the bottom of the invoice. Depending on the type of invoice, you have the following options:

Standard e-invoice

- **Void**

  If an invoice was issued in duplicate or has already been paid for through an earlier invoice, void it.

- **Correct Invoice**

  If an invoice has some incorrect information, correct it. When submitting a corrected invoice, you can use the same invoice number.

Country compliant e-invoice

> **Tip:** Country compliant e-invoices are marked with a green checkmark next to the country code in their top right corner.

- **Cancel Invoice**

  If an invoice was issued in duplicate, create a credit note to cancel it.

  If an invoice has some incorrect information (other than price or quantity), for example, incorrect tax rate or item description, create a credit note to cancel it and issue a new corrected invoice. The original invoice remains in disputed status and the corrected invoice is submitted for approval.

  > **Warning:** The corrected invoice must have a new number.

- **Adjust**

  If the price and/or the quantity for invoice lines(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it. You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.

If your customer disputes an invoice in error, or you choose not to resolve the dispute, your customer can withdraw the invoice from dispute and process it.

View and Manage Payments

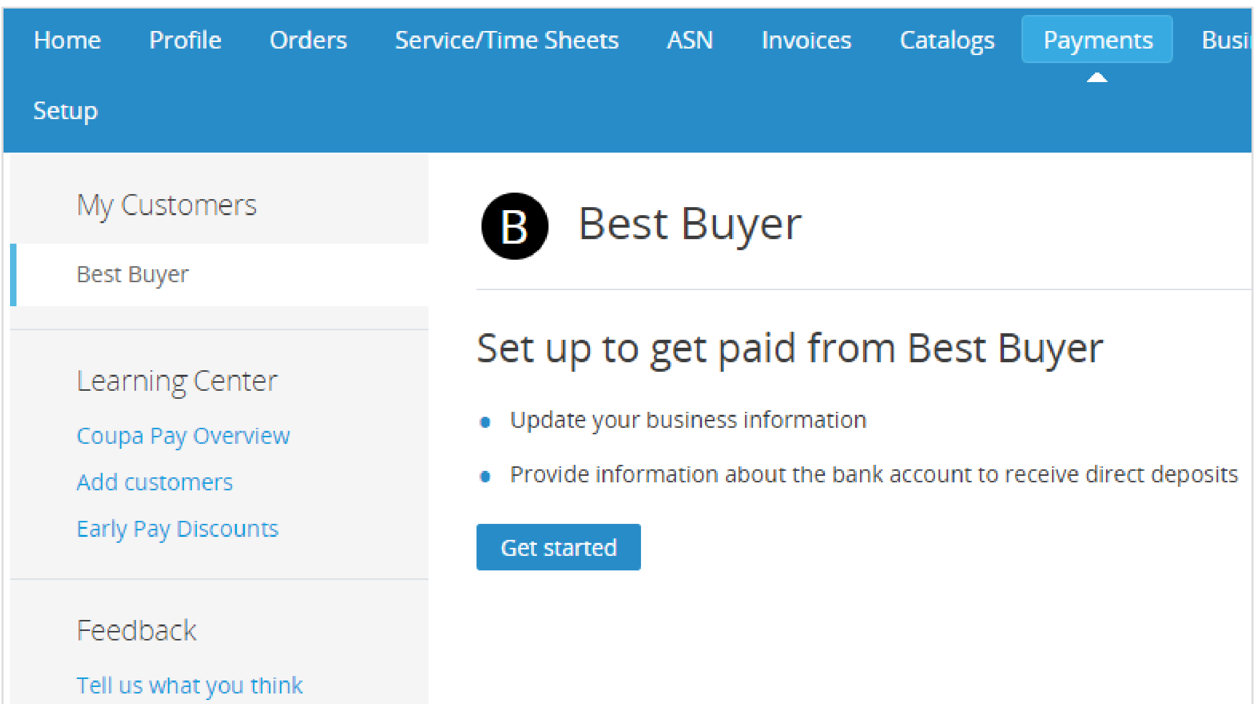
You can view and manage your invoice payments, payment accounts, and early pay discount preferences, and you can process your card payments and digital checks from the **Payments** page.

> **Note:** If you want to see the new **Payments** page, send your request to csp-bpm@coupa.com.

Go to the **Payments** page and on the left of the page, click on the customer's name for which you want to see payment details.

> **Tip:** If you have more than ten customers, you have the option to search for a customer name by entering it in the search bar under the **My Customers** header.

You might need to provide some information to see payment details.



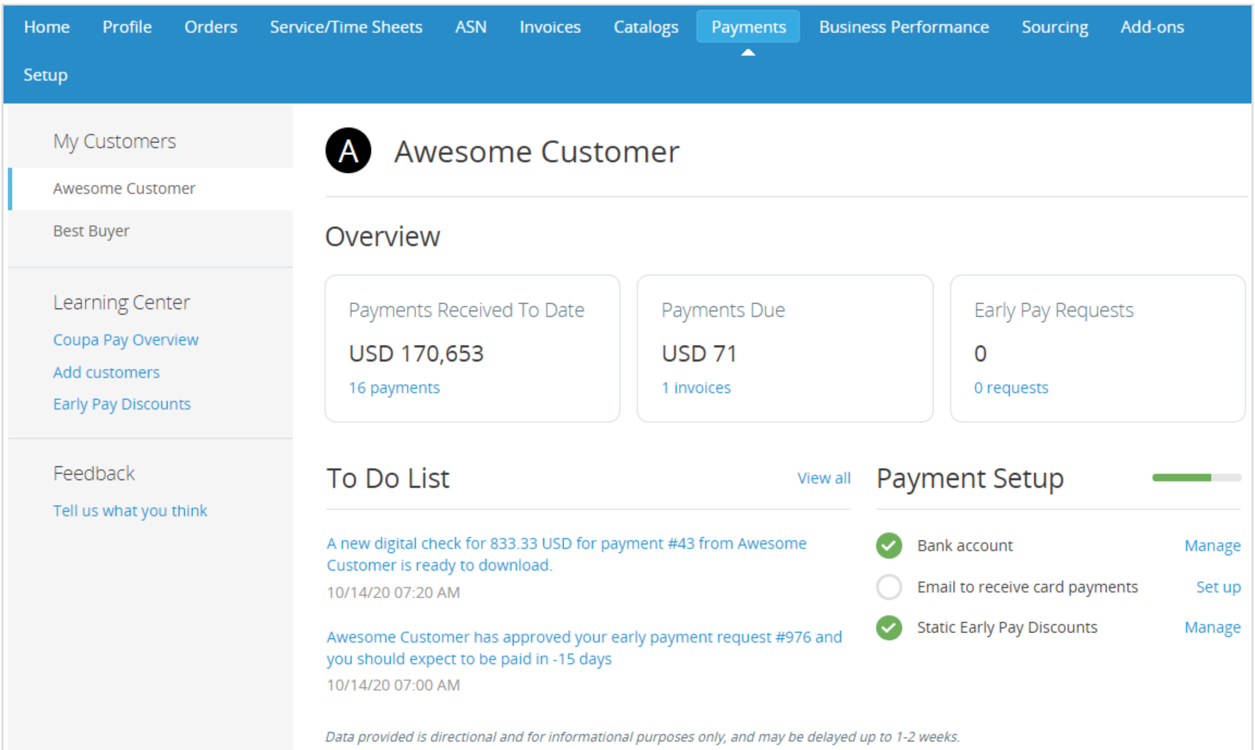
If you have not provided a legal entity, you are asked to update your business information and clicking **Get Started** takes you to the **Admin / Legal Entity Setup** page to set up a legal entity.

If you have not added or shared your bank account with the customer, you need to provide your bank information to receive direct deposits, or you need to provide an email address if you want to receive credit card information for virtual card payment. Clicking **Get Started** takes you to the **Admin / Remit-To page** to add a remit-to account.

> **Tip:** You are prompted to provide payment information also when you join the {{CSN_short}} through an email invitation from a Coupa Pay customer. For more information, see Create or Update Your Profiles.

If you have set up a payment account, you can see an overview of your payment transactions, a list of tasks, and payment setup progress and options.

Note: The data provided is directional and for informational purposes only, and may be delayed up to 1-2 weeks.



From this page, you can manage your invoice payments, payment accounts, and early pay discount preferences, and you can process your card payments and digital checks.

Overview

The **Overview** section shows the total amount and number of payments received to date, payments due, and early pay requests (visible only if your customer enabled dynamic discounting).

Note: Payments Due includes invoices that have not been marked as paid in Coupa. Payments made outside of Coupa are not included.

Clicking on the link that indicates the number of payments takes you to the **Invoice Payments** page that lists all the payments made by your Coupa Pay customer.

The link showing the number of invoices directs you to the **Invoices** page. For more information, see [View and Manage Invoices](#).

The link for the number of requests takes you to the page where you can select invoices for early payment and then set you payment discount preferences.

To do list

The **To Do list** contains payment-related notifications that need your attention or action, for example, early pay requests to be accepted, digital checks to be downloaded, or customer announcement notifications to be viewed. Clicking the **View all** link takes you to the **My Notifications** page.

If your list is empty, you are reminded to check your notification preference settings. For more information, see View and Manage Notifications.

Payment setup

In the **Payment Setup** section, you can set up or manage your bank account, the email to receive card payments, and your static or dynamic early pay discounts.

If you need to provide or manage your bank information for bank payments or email address for card payments, click the **Set up** or **Manage** link to go to the **Admin / Remit-To** page. For more information, see View and Manage Remit-to Information.

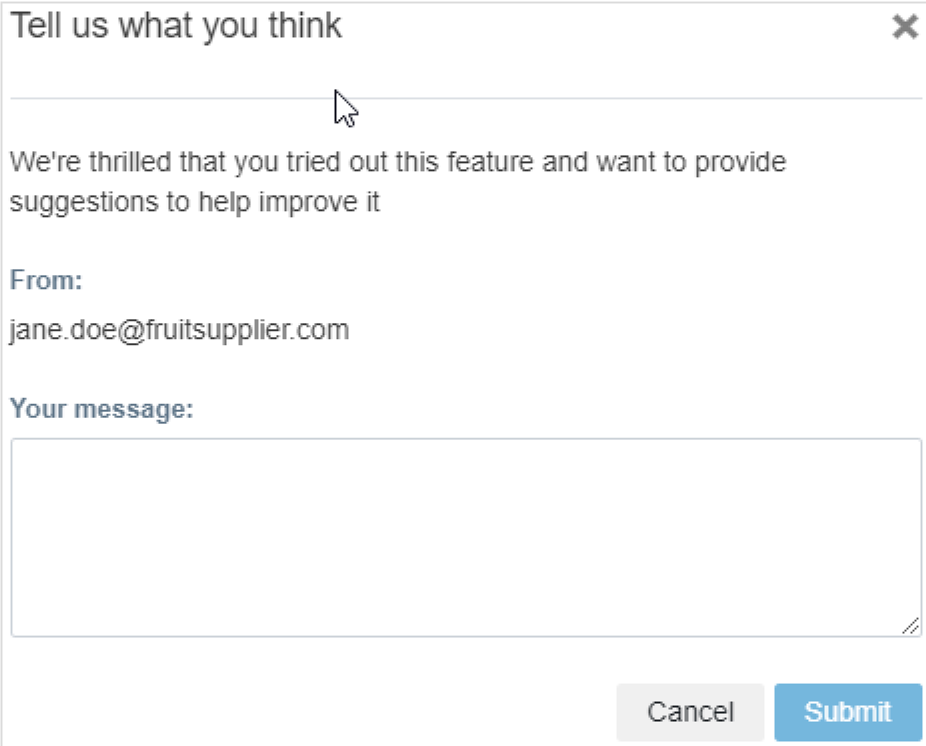
The **Set up** or **Manage** link for static or dynamic early pay discounts directs you to the **Static Discounting** or **Dynamic Discounting** page, where you can set your relevant payment preferences.

A green bar indicates your setup progress.

Help and feedback

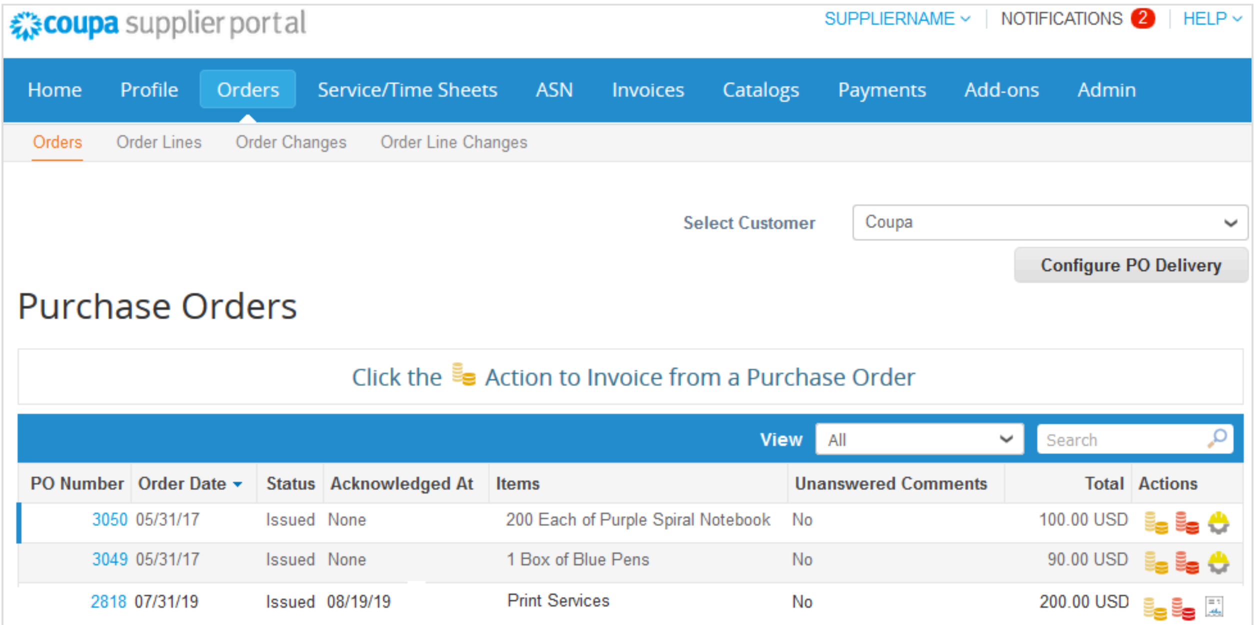
On the left of the **Payments** page, below the list of customers, you can find the **Learning Center** with links to the supplier.coupa.com pages about Coupa Pay, early pay discounts, and connecting with customers on the CSP.

Click the **Tell us what you think** link to provide feedback.


Tell us what you think
We're thrilled that you tried out this feature and want to provide suggestions to help improve it
From:
jane.doe@fruitsupplier.com
Your message:
Cancel
Submit

View and Manage POs

Click on the **Orders** tab on the main menu. The **Orders** page with the **Purchase Orders** table appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.

> **Note:** When you visit the page again, it shows you the POs from the customer you selected last time.

The **Purchase Orders** table shows the following information for all the POs you received from the selected customer.

Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO.
Order Date	Date when the PO was created.
Status	Current status of the PO. For more information, see the PO status list below.
Acknowledged At	Date when you acknowledged the receipt of the PO, or "None" if not acknowledged. You can choose to let your customer know that you received their PO by selecting the **Acknowledged At** checkbox on the PO. When you select the checkbox, the current date appears in the **Acknowledged At** column. 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 appears.
Items	List of items on the PO.
Unanswered Comments	Your comments on the PO for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the

Column	Description
	customer when you open the PO. **Note:** If you need urgent communication, contact your customer directly.
Total	Total amount of the PO.
Assigned To	Contains the email address of the users that have been assigned the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions. **Note:** This column is visible only if the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions are assigned to at least one user.
Actions	Click on the icons for the following actions: • - Create (flip the PO into) an invoice. Depending on your customer's settings, the tooltip text can be about creating an invoice from the PO or accepting the PO and creating an invoice. • - Create a credit note. • - Create a service/time sheet. • - Create (flip the PO into) an advance ship notice (ASN).

You can also print POs. Click on the **PO Number** link to open the PO and at the end of the PO, click on the **Print View** button. Depending on your browser, click on the three vertical dots or the three horizontal lines icon in the top right corner of the appearing window to open the browser menu, and select **Print** from the list of options.

Tip: You cannot reject a PO, but if you do not accept it, you can add a comment on it for your customer.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

POs can have the following statuses:

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Cancelled	The PO is cancelled and does not need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.

Status	Description
Error	Something is wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

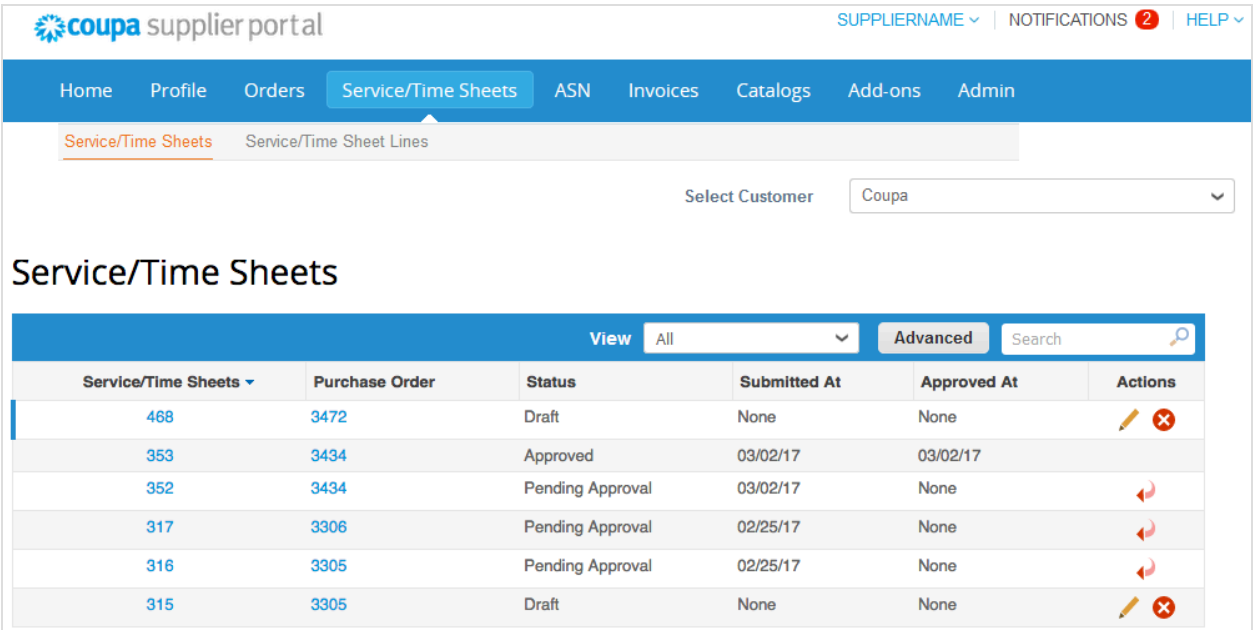
Above the table you can have instructions from the customer specifying, for example, policies or best practices.

View and Manage Service/Time Sheets

You can view, create, edit, and submit service/time sheets against purchase orders (POs).

> **Note:** The Service/Time Sheets feature is available only if your customer enables it for you. You also have to enable it for the CSP user(s) on the **Admin** page. For more information, see [Administer the CSP](#).

Click on the **Service/Time Sheets** tab on the main menu. The **Service/Time Sheets** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose service/time sheets you want to see.

> **Note:** When you visit the page again, it shows you the service/time sheets for the customer you selected last time.

The **Service/Time Sheets** table shows the following information for all the service/time sheets and their PO lines that you selected in the PO details.

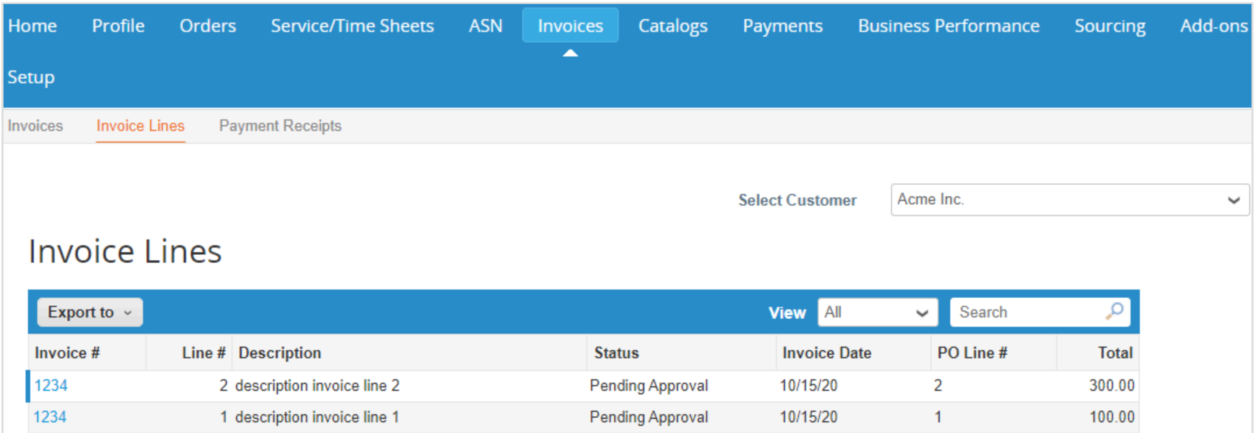
Column	Description
Service/Time Sheets	Service/time sheet number generated by Coupa. Click on it to view the service/ time sheet.
Purchase Order	PO number of the order that contains the line associated with the service/time sheet. Click on it to view the PO.
Status	Current status of the service/time sheet: approved, draft, or pending approval.

Column	Description
Submitted At	Date and time when you submitted the service/time sheet to your customer.
Approved At	Date and time when your customer approved the service/time sheet.
Created By	Date and time when you created the service/time sheet.
Assigned To	Contains the email address of the users that have been assigned the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions. **Note:** This column is visible only if the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions are assigned to at least one user.
Actions	Click on the icons to perform the following actions on a service/time sheet: • - Edit. • - Delete. • - Withdraw. You can edit or delete only draft service/time sheets. You can withdraw service/time sheets only in pending approval status.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

View Invoice Lines

Click on the **Invoice Lines** tab to see information on the invoice lines for each invoice.



From the **Select Customer** drop-down list in the top right corner, select the customer whose invoice lines you want to see.

Note: When you visit the page again, it shows you the invoice lines from the customer you selected last time.

The **Invoice Lines** table shows the following information for all the invoice lines:

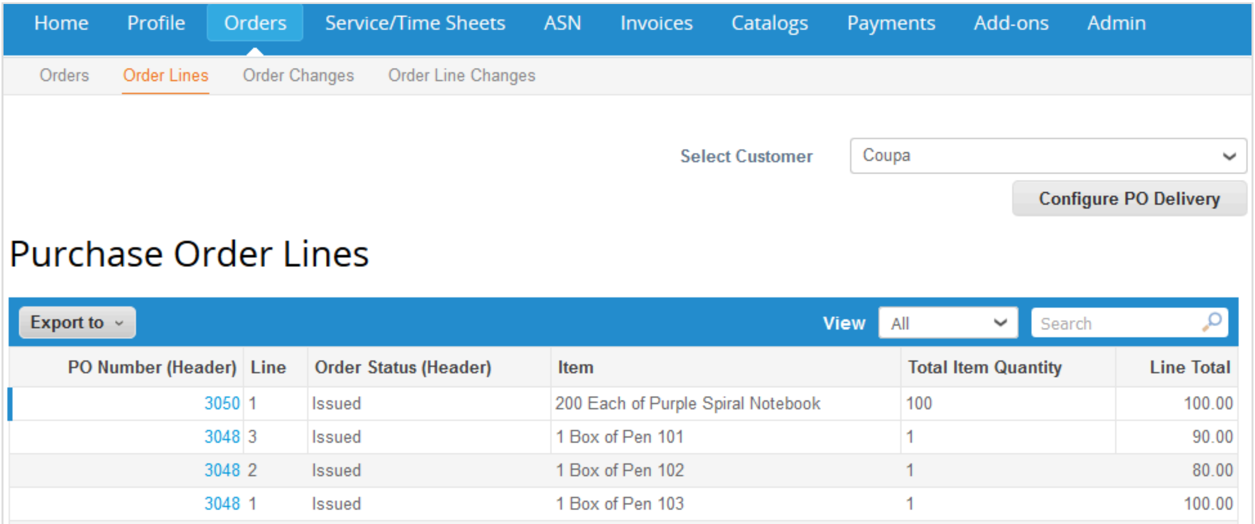
Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Line #	Invoice line number.
Description	Invoice line description.
Status	Current status of the invoice. For more information, see View and Manage Invoices.
Invoice Date	Date when the invoice was created.
PO Line #	PO line number.
Total	Total amount of the invoice line.

You can export the invoice lines table in CSV or Excel format.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

View PO Lines

Click on the **Order Lines** tab to see information on the PO lines for each PO.



From the **Select Customer** drop-down list in the top right corner, select the customer whose PO lines you want to see.

> **Note:** When you visit the page again, it shows you the PO lines from the customer you selected last time.

The **Purchase Order Lines** table shows the following information for all the PO lines:

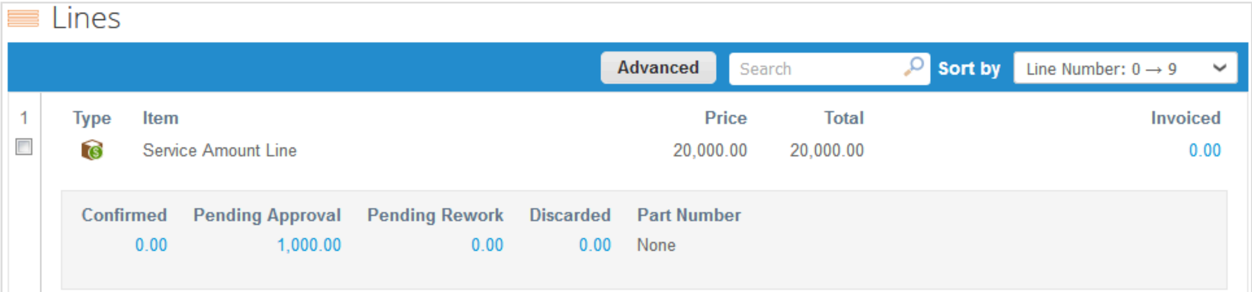
Column	Description
PO Number (Header)	PO number generated by Coupa. Click on it to see the PO line.
Line	PO line number.
Order Status (Header)	Current status of the PO. For more information, see View and Manage POs.
Item	List of items on each PO line.
Total Item Quantity	Total quantity of the PO line.
Line Total	Total amount of the PO line.

For your custom view, you can select to see the following additional information: ASN lines, carrier, confirmed quantity, delivery date, invoiced, line level text, need by date, received, ship method, ship note, shipment date, shipped quantity, and tracking number.

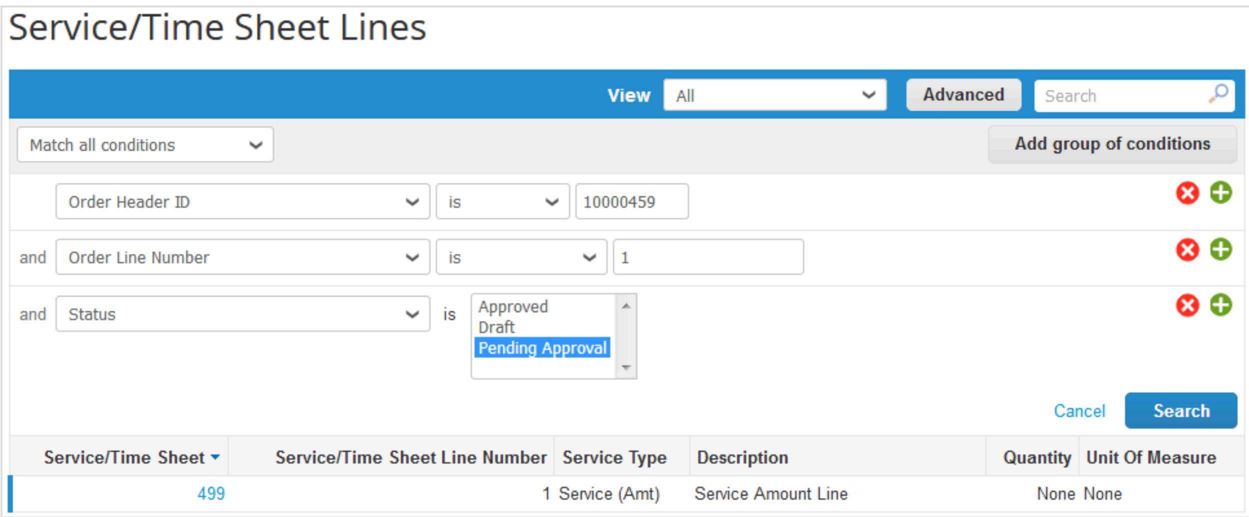
You can export the PO lines table in CSV or Excel format.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

PO lines for services include fields that show how much work has been confirmed, is pending approval, needs rework, or has been discarded.



Each amount is clickable and provides a filtered table view showing all the lines that have amounts.



For more information, see View Service/Time Sheet Lines.

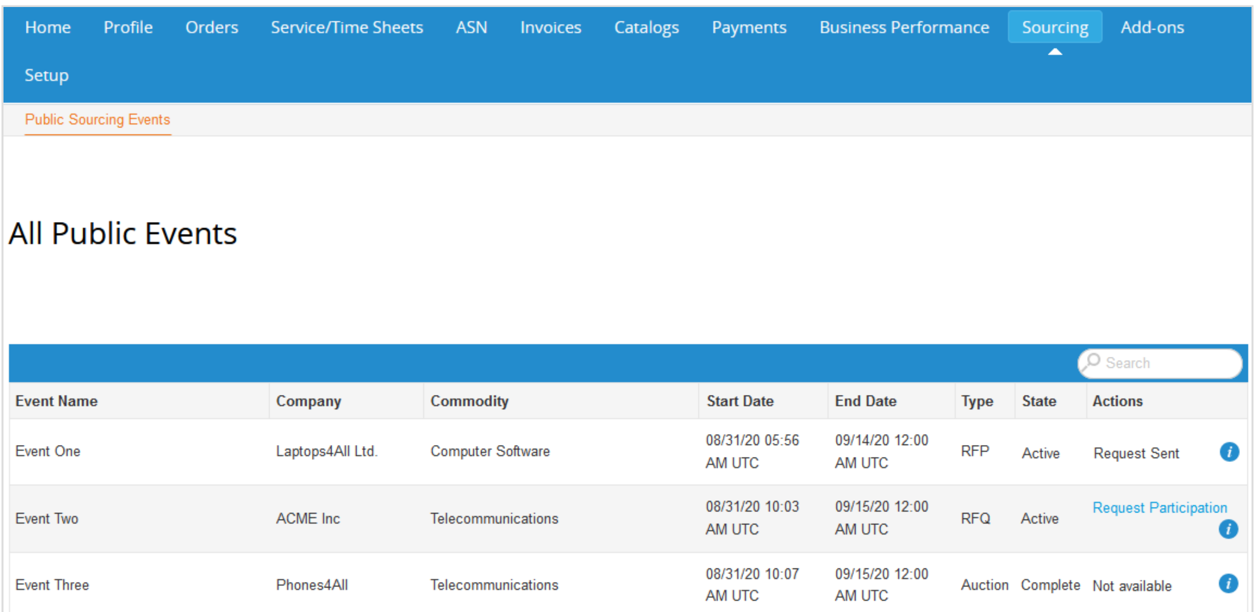
View Public Sourcing Events

Go to **Sourcing > Public Sourcing Events** to view public sourcing events created by your customer(s) and all the other customers that use Coupa.

> **Note:** You can see this page only if you have the **Sourcing** permission. For more information, see <u>Manage Users</u>.

The **All Public Events** page shows a table with the following details of the public sourcing events: **Event Name**,

Company (customer), **Commodity** (customer), **Start Date**, **End Date**, **Type**, **State**, and **Actions**. Click on the **Info** ( ) icons to learn more about the events.



Event Name	Company	Commodity	Start Date	End Date	Type	State	Actions
Event One	Laptops4All Ltd.	Computer Software	08/31/20 05:56 AM UTC	09/14/20 12:00 AM UTC	RFP	Active	Request Sent
Event Two	ACME Inc	Telecommunications	08/31/20 10:03 AM UTC	09/15/20 12:00 AM UTC	RFQ	Active	Request Participation
Event Three	Phones4All	Telecommunications	08/31/20 10:07 AM UTC	09/15/20 12:00 AM UTC	Auction	Complete	Not available

You can search for events by event name, commodity, and type.

Both complete (not available) and active events are shown. Complete events are listed for your information, but they are not available for participation.

If you want to participate in an event, click on the relevant **Request Participation** link in the **Actions** column. The action name changes to **Request Sent** and if your request is approved, you receive an email invitation to the event and the action for the event changes to **Request Approved**.

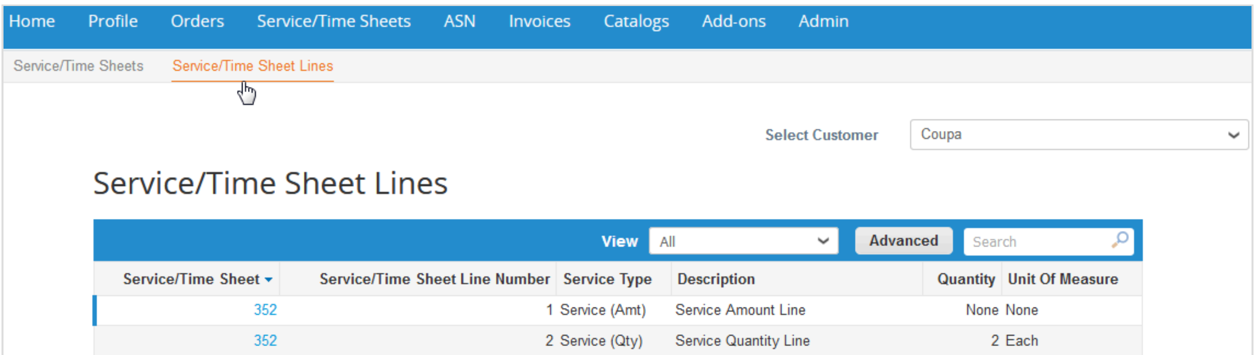
> **Note:** Events are displayed in the languages that customers use to create them.

If there are no public events, you can see a relevant message instead of the events table.

View Service/Time Sheet Lines

Note: The Service/Time Sheets feature is available only if your customer enables it for you. You also have to enable it for the CSP user(s) on the **Admin** page. For more information, see Administer the CSP.

Click on the **Service/Time Sheet Lines** tab to see information on the service/time sheet lines for each service/time sheet.



From the **Select Customer** drop-down list in the top right corner, select the customer whose service/time sheet lines you want to see.

Note: When you visit the page again, it shows you the service/time sheet lines from the customer you selected last time.

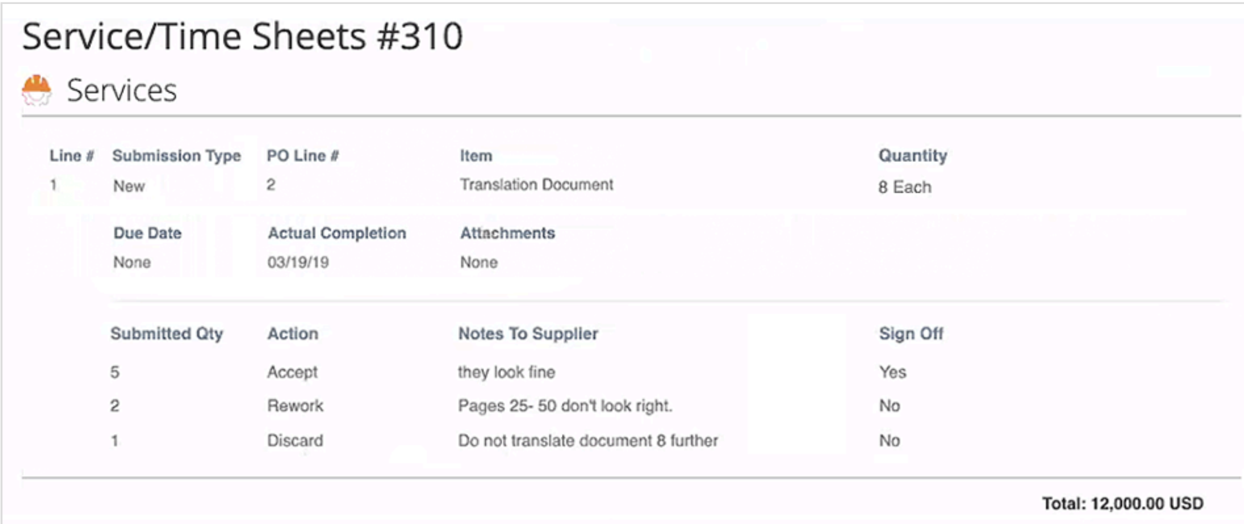
The **Service/Time Sheet Lines** table shows the following information for all the service/time sheet lines:

Column	Description
Service/Time Sheet	Service/time sheet number generated by Coupa. Click on it to see the service/time sheet line.
Service/Time Sheet Line Number	Service/time sheet line number.
Service Type	Type of the service, for example, service amount, service quantity, or resource.
Description	Description of the service.
Quantity	Service quantity.
Unit of Measure	Unit of measure (UOM) of the service.

For your custom view, you can select to see the following additional information: is rework, notes to supplier, remaining rework amount/quantity/count, status, action taken by the customer (accept, rework, or discard), and so on.

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

When you view service/time sheet lines, you can see the customer's notes, for example, about what work was accepted, what needs additional rework, and if any work was discarded, with **Submitted Qty**, **Action**, **Notes to Supplier**, and **Sign Off** clearly shown.

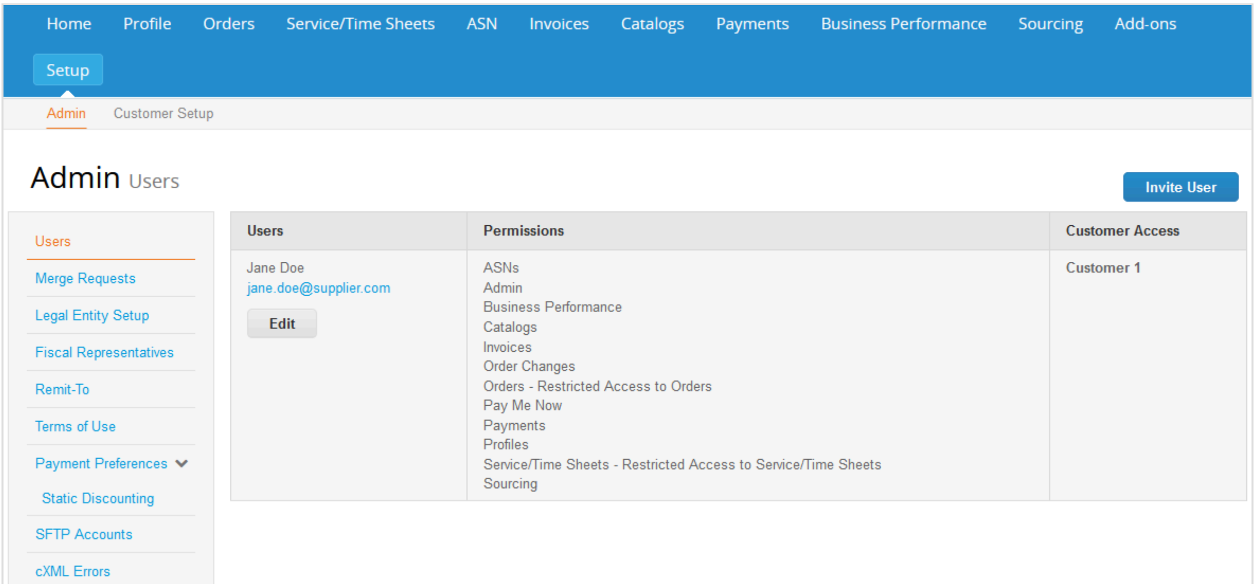


Administer the CSP

This chapter contains the following topics:

Admin Page

On the **Admin** page you can manage users and merge requests, and the remit-to addresses for your customers; you can set up legal entities and fiscal representatives; you can view and sign the terms of use, set your early payment discount terms (Coupa Accelerate preferences), create SFTP accounts, and view cXML submission errors.



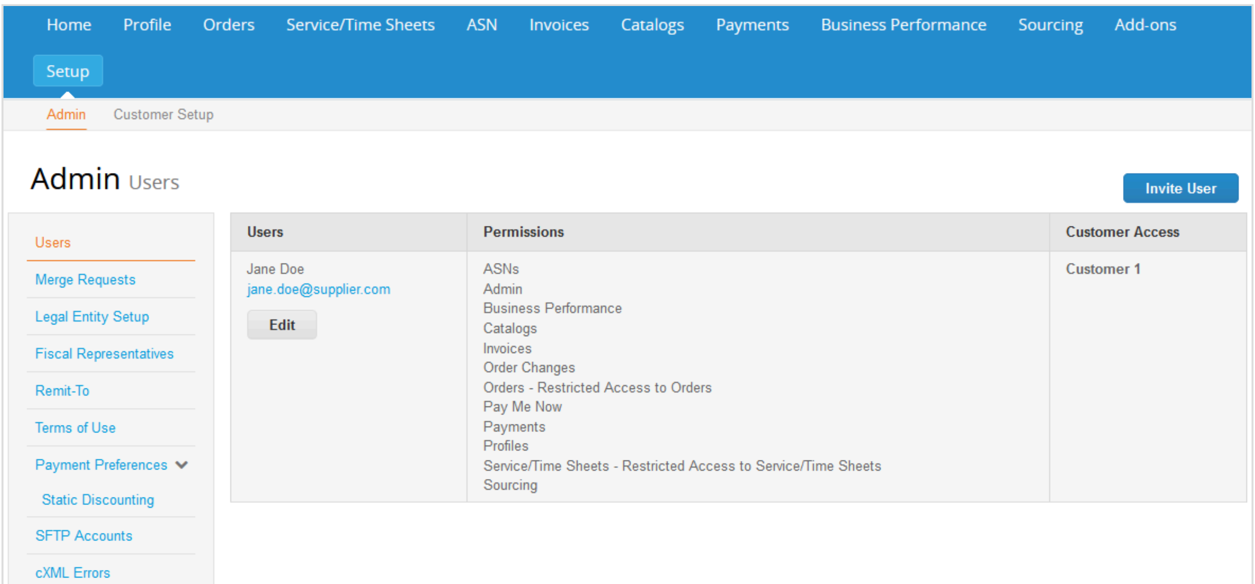
Menu Item	Description
Users	Invite new users, and manage what each user can do in the CSP and which customers your users can interact with.
Merge Requests	Manage any merge requests that you sent to or received from other supplier accounts.
Legal Entity Setup	Set up your account for electronic invoicing.
Fiscal Representatives	Add fiscal representatives that you need if you have operations in a country/region where you are not registered legally but you need to be represented for tax purposes.
Remit-To	Create and manage multiple remit-to addresses that are used to determine the payment location for invoices. This is important for creating legally compliant invoices.
Terms of Use	To use the Coupa Supplier Portal (CSP), you must accept the terms of use.
Payment Preferences / Static Discounting	Set preferred payment terms (early payment discounts terms) to be applied to any of your customers across all your invoices.
SFTP Accounts	Create and manage SFTP accounts to load invoices quickly.
cXML Errors	Get cXML error notifications and view the list of cXML errors to ensure timely correction and better handling of cXML transmission failures.
SFTP Errors	View the list of SFTP (CSV) file upload errors to ensure timely correction and better handling of SFTP transmission failures.

Manage Users

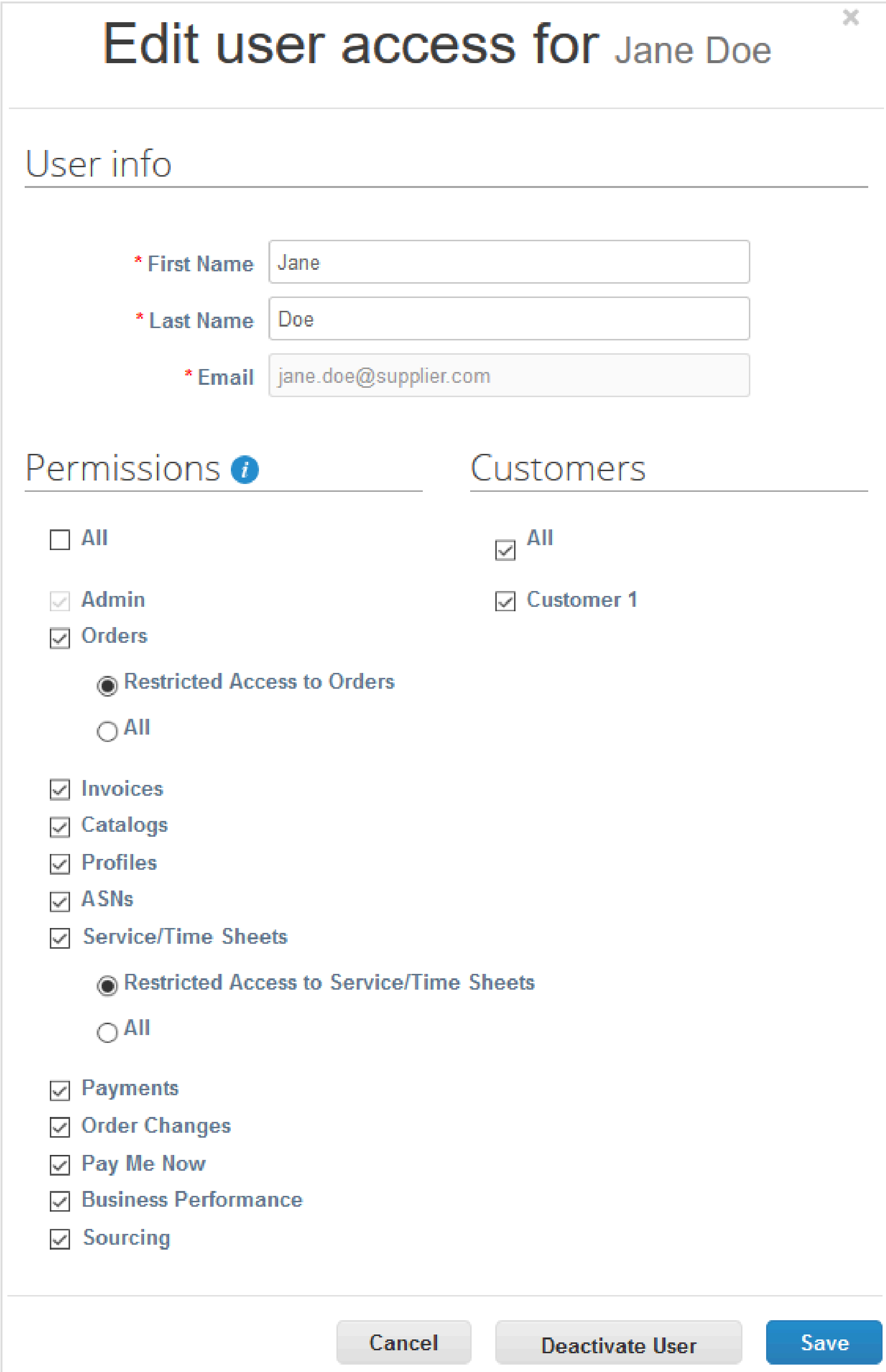
Permissions grant access for users to corresponding menu items. As an admin user, you have all the permissions by default.

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 with their assigned customers.

Go to **Setup > Admin**. The **Admin Users** page appears.



Click on the **Edit** button to open the **Edit user access for [User Name]** window.



You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

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

You cannot change the user's email address. If a user wants to change the email address, send a new invitation to that user.

The **Invite User** and **Edit user access for [User Name]** windows are almost identical, but when you invite a user, you can specify an email address.

User permissions

Permissions	Description
All	Gives full access to all CSP functions, except for user administration.
Admin	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. The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers. When selected, All is on by default.
Restricted Access to Orders	Allows accessing specific POs (assigned to specific users). The permission is off by default.
All	Allows viewing and managing all POs received from customers. When Orders is selected, it is on by default.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. **Note:** All users, regardless of permissions, can edit the public profile.
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs. When selected, All is on by default.
Restricted Access to Service/ Time Sheets	Allows accessing specific service/time sheets (assigned to specific users). The permission is off by default.
All	Allows creating and submitting any service/time sheets against POs. When Service/Time Sheets is selected, it is on by default.
Payments	Allows viewing payments and downloading digital checks.
Order Changes	Allows submitting PO change requests.
Pay Me Now	Available only if your customers use Coupa Pay and 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.

Tip: Click on the **Info** () icon next to the **Permissions** header for more information.

The Info () icon tooltip shows the following information:

Permissions grant access for the user to the corresponding menu items.

For Orders and Service/Time Sheets, an additional level of granularity allows restricting a user's access to documents that are specifically assigned to them. If you want to apply this restriction, select the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions.

Some customers may not support restricting access to orders and service/time sheets. Contact the Customer Company Admin to confirm if needed.

Note: For auditing purposes, Coupa does not allow users to be deleted, so 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.

Reactivate users

You can deactivate users when necessary. Also, users are deactivated automatically due to inactivity. For more information, see Inactivity.

You can see the relevant user status: inactive or deactivated. If you hover over a user's status, the following tooltip text is displayed informing you about the reason why a supplier user is not active:

- Deactivated: This user has been manually deactivated by an admin. It can be reactivated only by admin reactivation.
- Inactive: This user's account has been deactivated due to inactivity. It can be reactivated by validating the user's email during their next login attempt.

You can activate both inactive and deactivated users. If you activate them, they receive an email notification to verify their email.

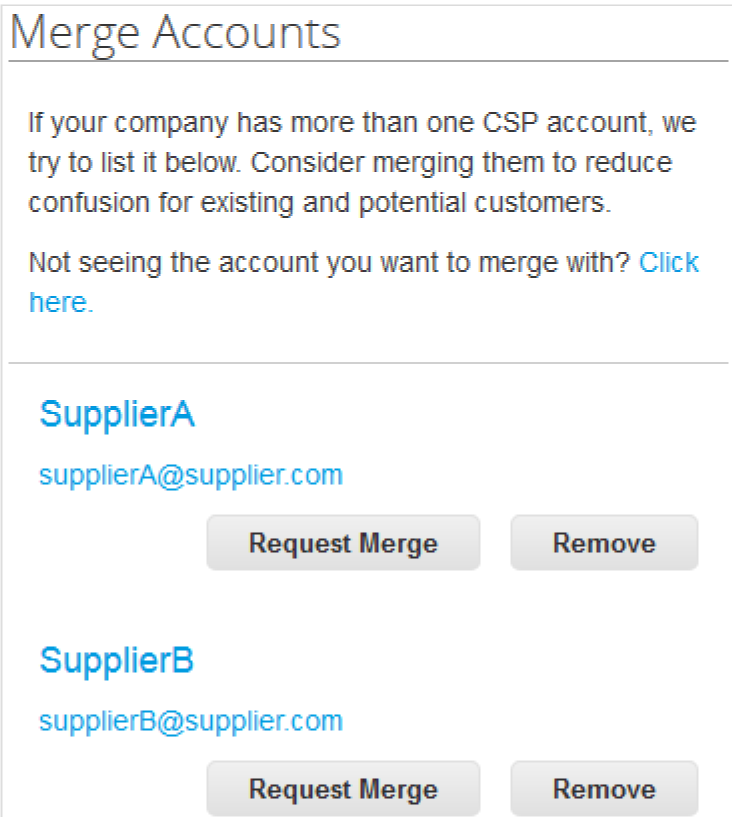
If you deactivate users, you can always reactivate them later. If you reactivate a user, the customer access is reset for that user, so you'll have to assign customers to that user again.

Manage Merge Requests

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

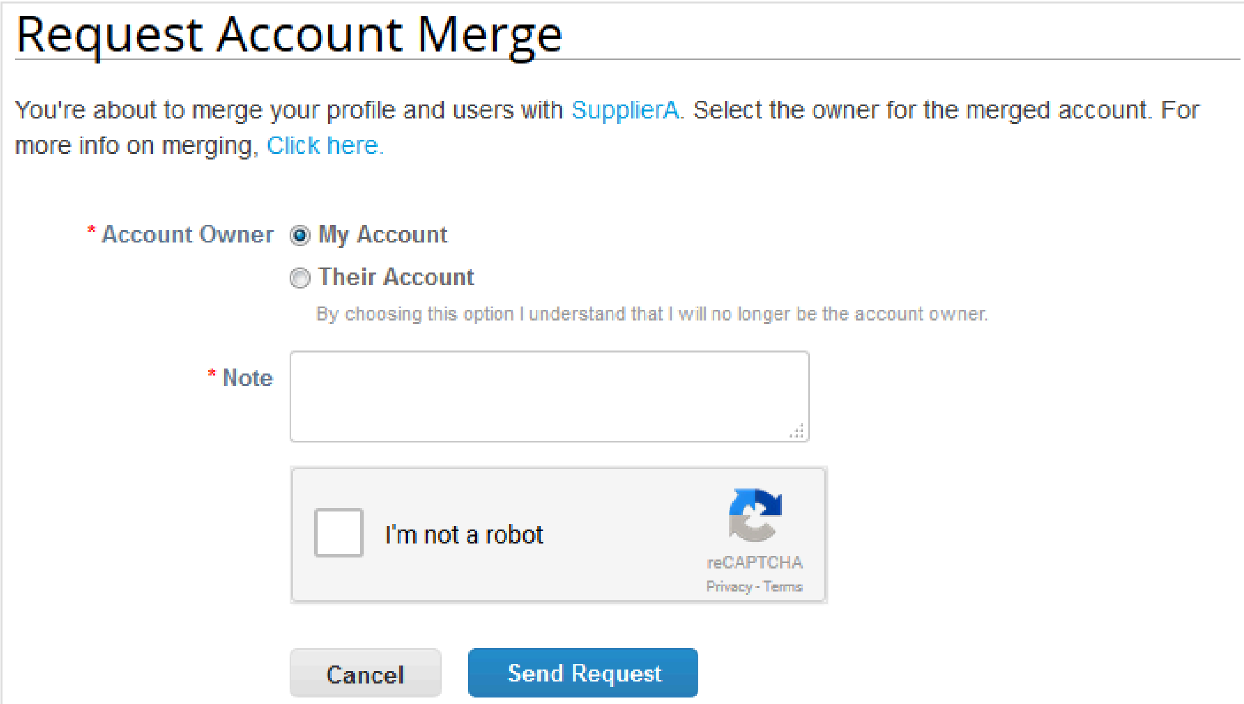
> **Note:** Accounts with the same email address are merged automatically (regardless of which invite message you use to create your account, since both invites are sent to the same email address).

The suggestions to merge accounts are based on email domain. For example, all the users with the @example.com domain get suggestions to merge. Merge suggestions appear in the right-hand column on the **Home** page.



If you know that a suggestion is invalid, click on the **Remove button** and you will not see the request again.

If you want to merge an account, click on the **Request Merge** button and select an account to be the parent account and add a note.

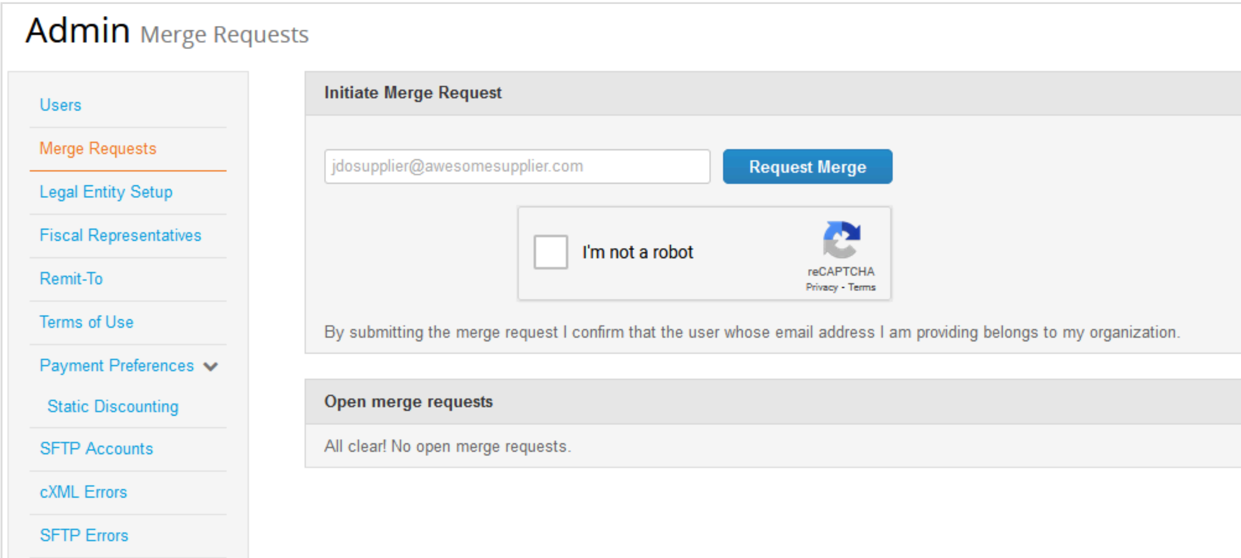


Selection	Description
*Account Owner / My Account	This causes the other account to be merged into your company account. The other user's company account is removed. You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information, see Manage Users.
*Account Owner / Their Account	Your company account is removed. The other user's company account becomes the only company account. You can no longer be the account administrator, but the administrator of the existing account can choose to make you an administrator of the merged account.
*Note	Add a note about the merge request, for example, the reason for the account merge.

Merged accounts use the following rules:

Element	Merge Behavior
Connected customers and customer profiles	Any connected customers are retained in the new account. The existing email address remains the contact email for the customer. If the customer is connected to both accounts, the parent account connection is retained and the merged account connection is removed.
Remit-to addresses	Remit-to information is transferred only for addresses that are available to all customers.

You can also search for a specific account to merge, for example, if the account is not listed or the list is too long to search for the specific account that you want. Clicking on the **Click here** link takes you to the **Admin Merge Requests** page. You can access this page also by clicking on the **Admin** tab on the main menu and on the **Merge Requests** link on the left.



Provide the email address of the account you want to merge, and click **Request Merge**.

You can see purchase orders and create invoices for both supplier records after selecting a customer from the **Select Customer** drop-down.

Set up Legal Entities

You can set up your account to create electronic invoices from the **Admin / Legal Entity Setup** page. You can add, manage, or deactivate legal entities, or manage remit-to accounts.

You can provide more remit-to accounts and add this information to your legal entities so that your customers can use different payment methods when working with you.

> **Note:** You can receive payments through the CSP only if your customer(s) enabled Coupa Pay.

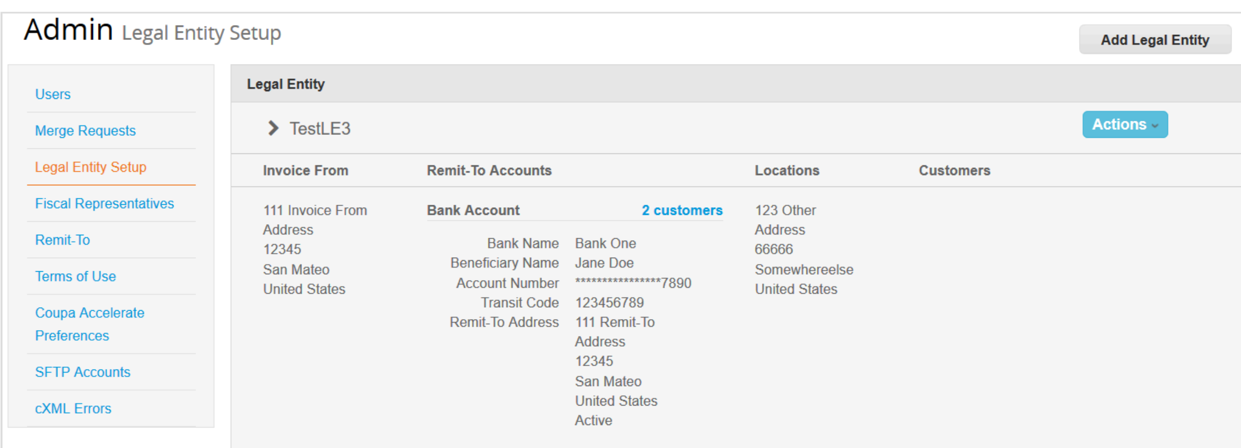
View and manage legal entities

On the left of the **Admin** page, click on the **Legal Entity Setup** link.

If you have three or more legal entities, they are collapsed. To view their details, click on the **Down** arrows.

Each legal entity has the following sections:

- **Invoice From**
- **Remit-To Accounts** – Can be of type: **Address**, **Bank Account**, or **Virtual Card**.
- **Locations**
- **Customers** – The name(s) and number of customers that you provided with the specific legal entity are also shown. Hovering your cursor over ***n* customers** displays the name(s) of the customer(s) associated with the legal entity.



Create a legal entity

To add a legal entity, click on the **Add Legal Entity** button in the top right corner.

> **Tip:** You can add legal entities also from the **Profile** edit page directly or when creating an invoice. See Create or Update Your Profiles and Create or Edit an Invoice for more information.

Enter the official name of your business that is registered with the local government (legal entity name) and select the country/region where it is located. Click **Continue**, and in the appearing **Tell your customers about your organization** window, fill in at least the mandatory fields, that is, the fields marked with a red asterisk (*).

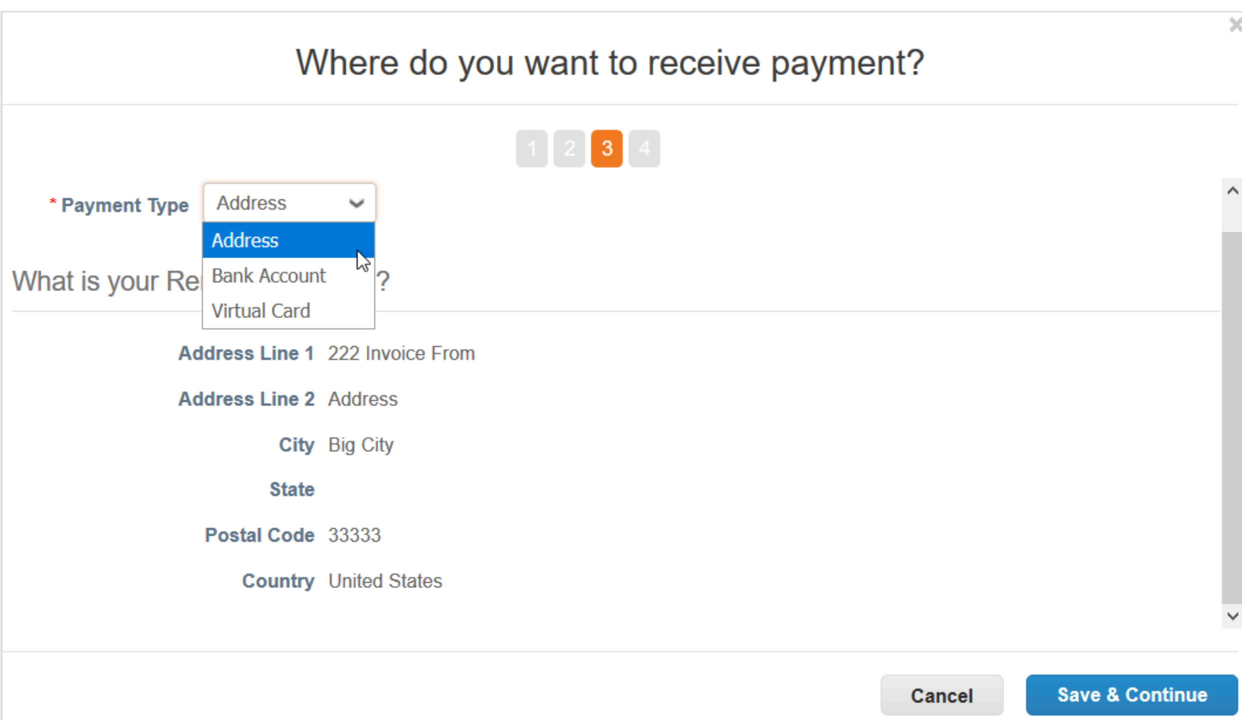
Field/Checkbox	Description
Which customers do you want to see this?	Select all or the specific customer(s) that you want to see your legal entity information. Customers that use Coupa for payments are marked with the Coupa Pay ( ) icon. If you select a Coupa Pay customer, the payment information that you enter is validated. The icon and tooltip are different depending on whether your banking information is: • Valid: • Invalid: • Pending validation:
What address do you invoice from?	Required for invoicing. Is critical for compliance in some countries. Registered address of your legal entity. This is the same location where you receive government documents. It might differ from the physical address. Sometimes this is called your address of record or registered company address. Address line 1, city, and postal code are mandatory.
Country/Region	The country/region you selected when adding the legal entity.
Use this address for Remit-To*	Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
Use this for Ship From address*	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or you have more than one location. **Tip:** Include this information on the invoice when the addresses are different. For many countries, including this information is mandatory.
What is your Tax ID?	Enter your tax/VAT ID. **Note:** If you are exempt from tax registration in some regions/countries, select the **I don't have TAX ID Number** checkbox and enter your local tax ID or write N/A in the appearing **Local Tax ID** field.

Field/Checkbox	Description
Country/Region	Select your tax country/region from the drop-down list.
Tax/VAT ID	Enter the tax/VAT ID, including the prefix to the number, for example, GB1234567890. **Tip:** You can add more tax IDs by clicking on the **Add additional Tax ID** link.
I don't have a TAX ID Number	Select the checkbox to add your local tax ID or write N/A in the **Local Tax ID** field.
Miscellaneous	
Invoice from Code	Tie your CSP invoice-from address (that is, registered address) with the corresponding address in your ERP.
Preferred Language	Select your language from the drop-down list.

*If your remit-to and ship-from addresses are different from your invoice-from address, you need to provide also that information.

After filling in the fields, click **Save and Continue**. In the appearing **Where do you want to receive payment?** window, select from the following payment types: **Address**, **Bank Account**, and **Virtual Card**.

Note: You can see these options and provide your information even if your customer does not use Coupa Pay. However, when you create an invoice for a customer that does not have Coupa Pay enabled, you cannot select the virtual card option.



If you select **Address** (default option), you can continue to the next step as you already provided the address(es) on the previous page.

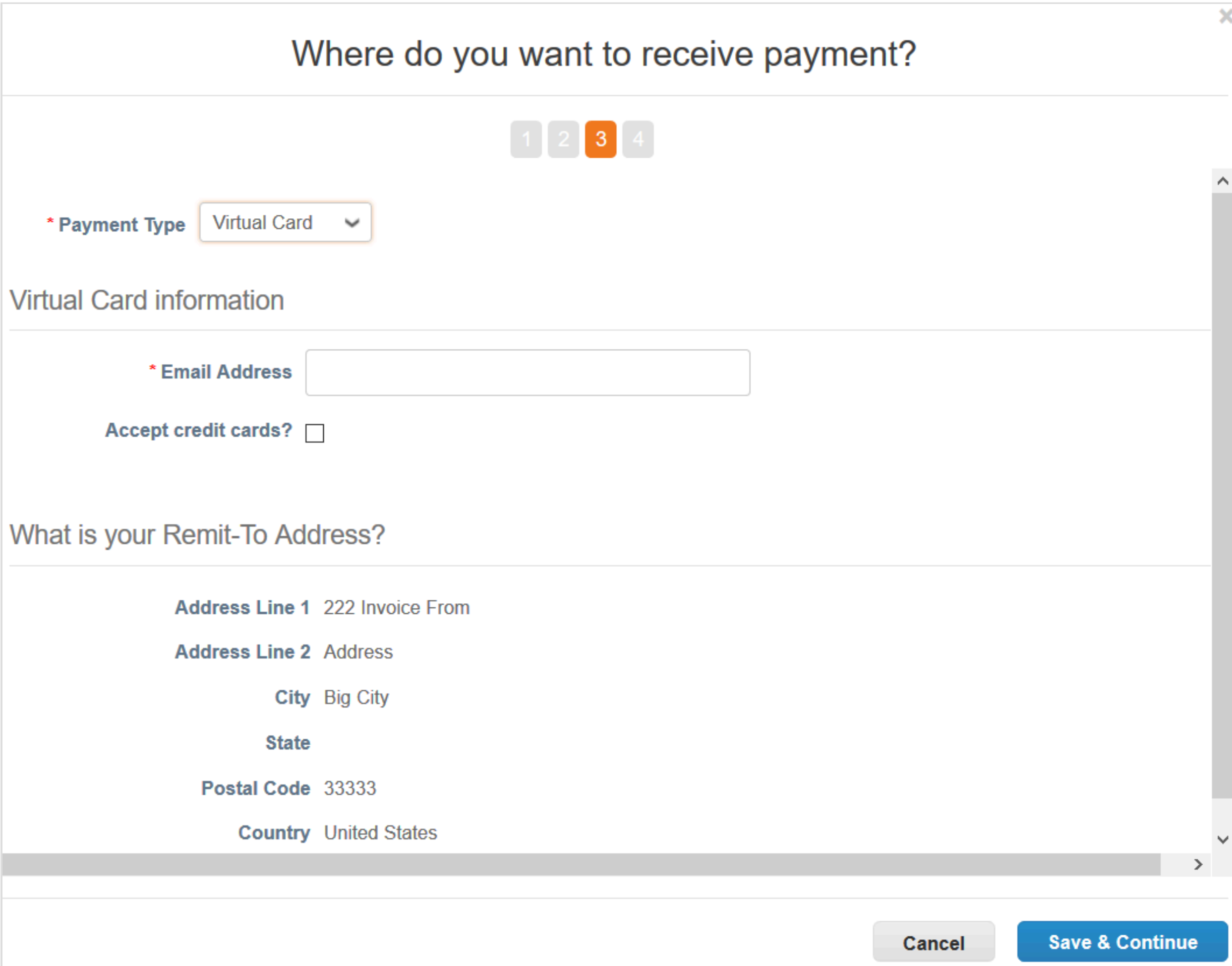
If you select **Bank Account**, you can provide your banking information to be shown on your invoices.

> **Note:** The available bank account fields and field names depend on the selected country.

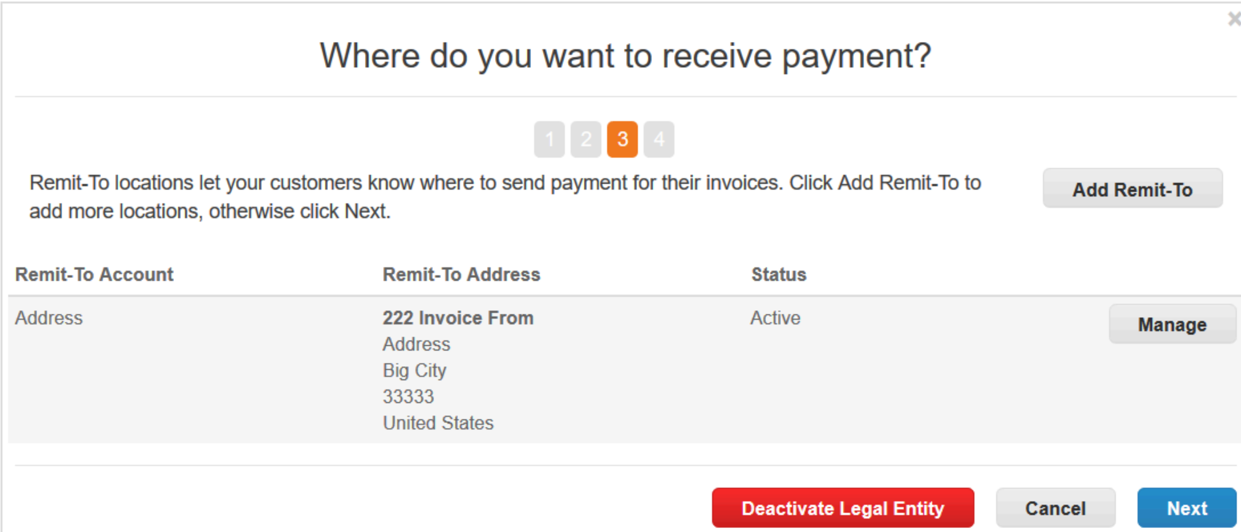
Field/Checkbox	Description
What are your Bank Account Details?	Optional but recommended banking information for the remit-to address. You can use both domestic (US) and international (global) banking information. **Note:** Banking information is required for compliant invoicing in some countries when indicated (with a red asterisk). Otherwise, banking information is not required and remains private. Some banking information is also required if your customers use Coupa for payments. **Tip:** Click on the Info (i) icons next to the fields to see the tooltips showing the number and type of characters allowed in the banking information fields depending on the selected bank account country. This information is displayed on the invoice.
Bank Account Country/Region	Select the country from the drop-down list. By default, your legal entity country/ region is selected.
Bank Account Currency	Select the currency from the drop-down list. By default, it is the currency of the bank account country/region.
Beneficiary Name	Enter the name of your beneficiary. By default, it is your legal entity name.
Bank Name	Enter the name of your bank.
Account Number	Enter your account number.
Confirm Account Number	Confirm your account number by entering it again.
IBAN	Enter your International Bank Account Number.
Confirm IBAN	Confirm your International Bank Account Number.
Routing (Bank Code) Number	Select one of the **Routing Number** (default), **Bank Code**, **BSB**, **IFSC**, **Sort Code**, or **Transit Number and Institution Number** fields and fill in the field next to it accordingly.
SWIFT/BIC Code	Enter your SWIFT/BIC code.
Bank Account Type	Type of the bank account: business or personal.
What is your Bank's Branch Address?	Includes address-specific fields: **Address Line 1**, **Address Line 2**, **City**, **State**, and **Postal Code**.
What is your Remit-To Address?	Address where you want to receive payment. (If you receive payments to a different location than where your business is registered.). Includes mandatory address-specific fields: **Address Line 1**, **Address Line 2**, **City**, **State**, **Postal Code**, and **Country/Region**.
What is your Remit-To Integration Code?	Code to tie your CSP remit-to address to the corresponding address in your ERP.
Who is your Remit-To Contact?	Optional contact information for the remit-to address: name, email, phone number, fax number, and website.

Which customers can use this account?	Select all or the specific customer(s) that you want to see your remit-to account.

If you select **Virtual Card**, you need to provide an email address and you can indicate if you accept credit cards.



The **Where do you want to receive payment** window shows both the **Remit-To Account** and the **Remit-To Address**.

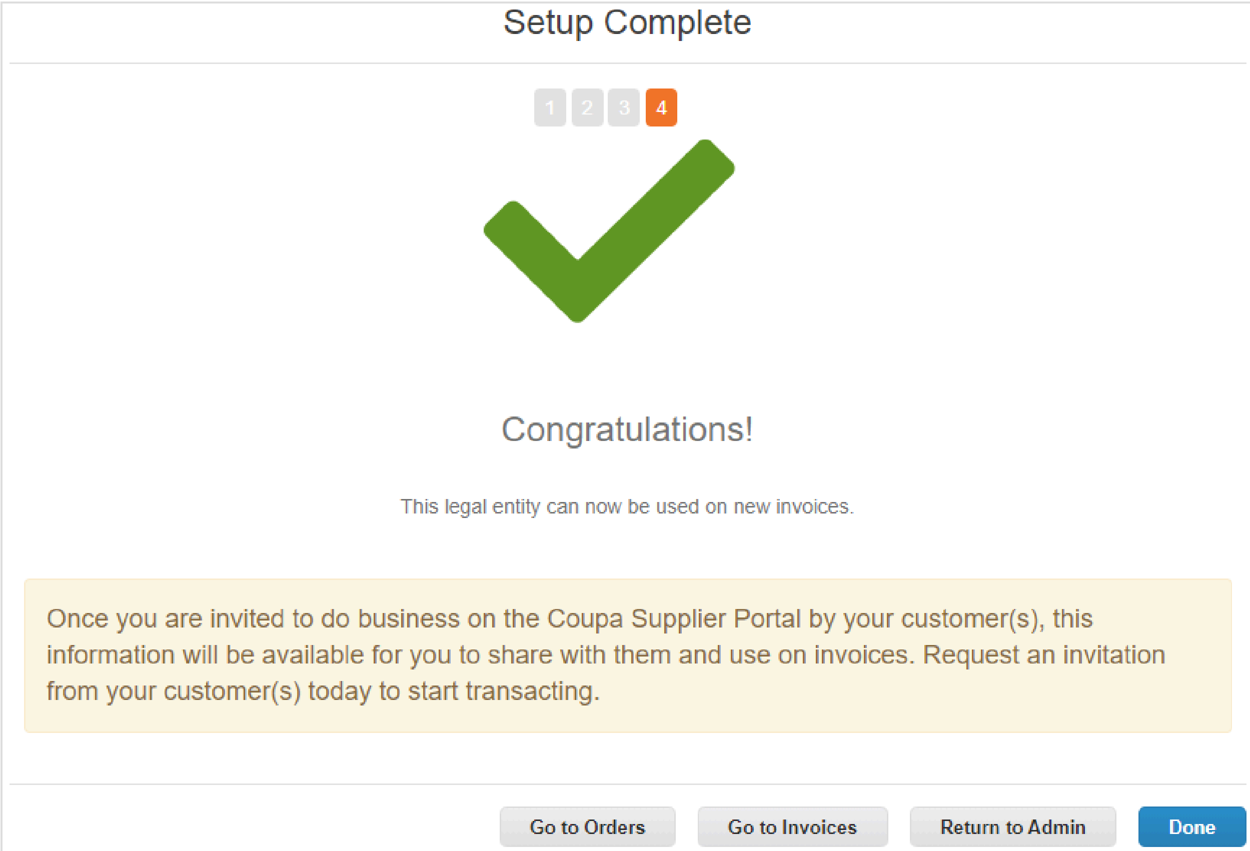


To manage your legal entities, click on the **Actions** button on the **Legal Entity Setup** page, select **Manage Legal Entity**, and click **Continue**. In the appearing **Where do you want to receive payment** window, you can add a new remit-to address.

You can deactivate a legal entity by selecting **Deactivate Legal Entity** from the **Actions** button or on any of the appearing windows.

Click **Next** to add the address where you want to ship goods from, if it is different from the remit-to address. Fill in at least the mandatory fields and click **Continue**.

After completing the legal entity setup by clicking **Done**, that is, after adding a legal entity, you can use it on new invoices. From the **Setup Complete** page you can choose to **Go to Orders**, **Go to Invoices**, or **Return to Admin** page.



To manage your remit-to accounts, go to **Setup > Admin > Remit-To**. For more information, see View and Manage Remit-to Information.

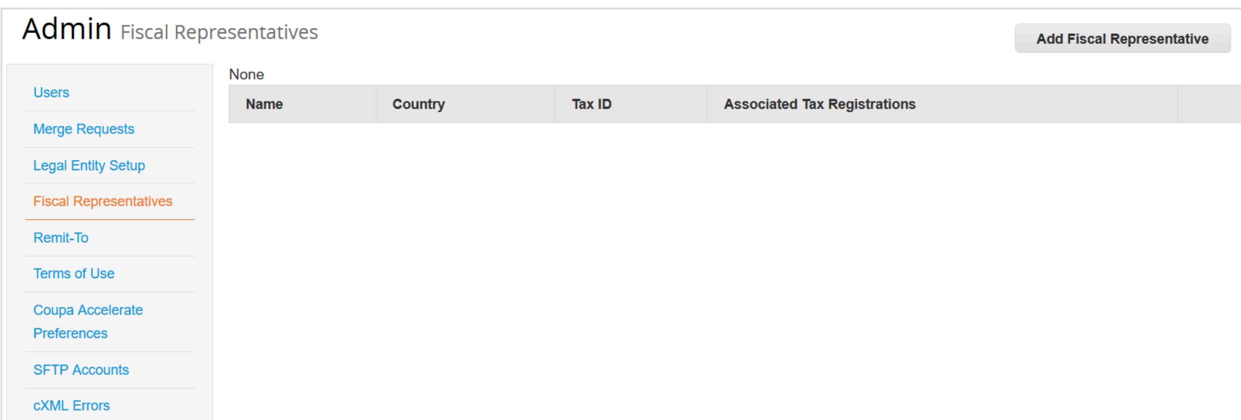
Add Fiscal Representatives

You need a fiscal representative if you are legally registered in Country/Region A, but you have some operations in Country/Region B that requires you to be registered for tax purposes in Country B. As you are not legally registered (with a local address) in Country/Region B, you need a representative/agent to represent you towards the tax authorities if they need to contact your business. Furthermore, in some countries this information must be on the invoice.

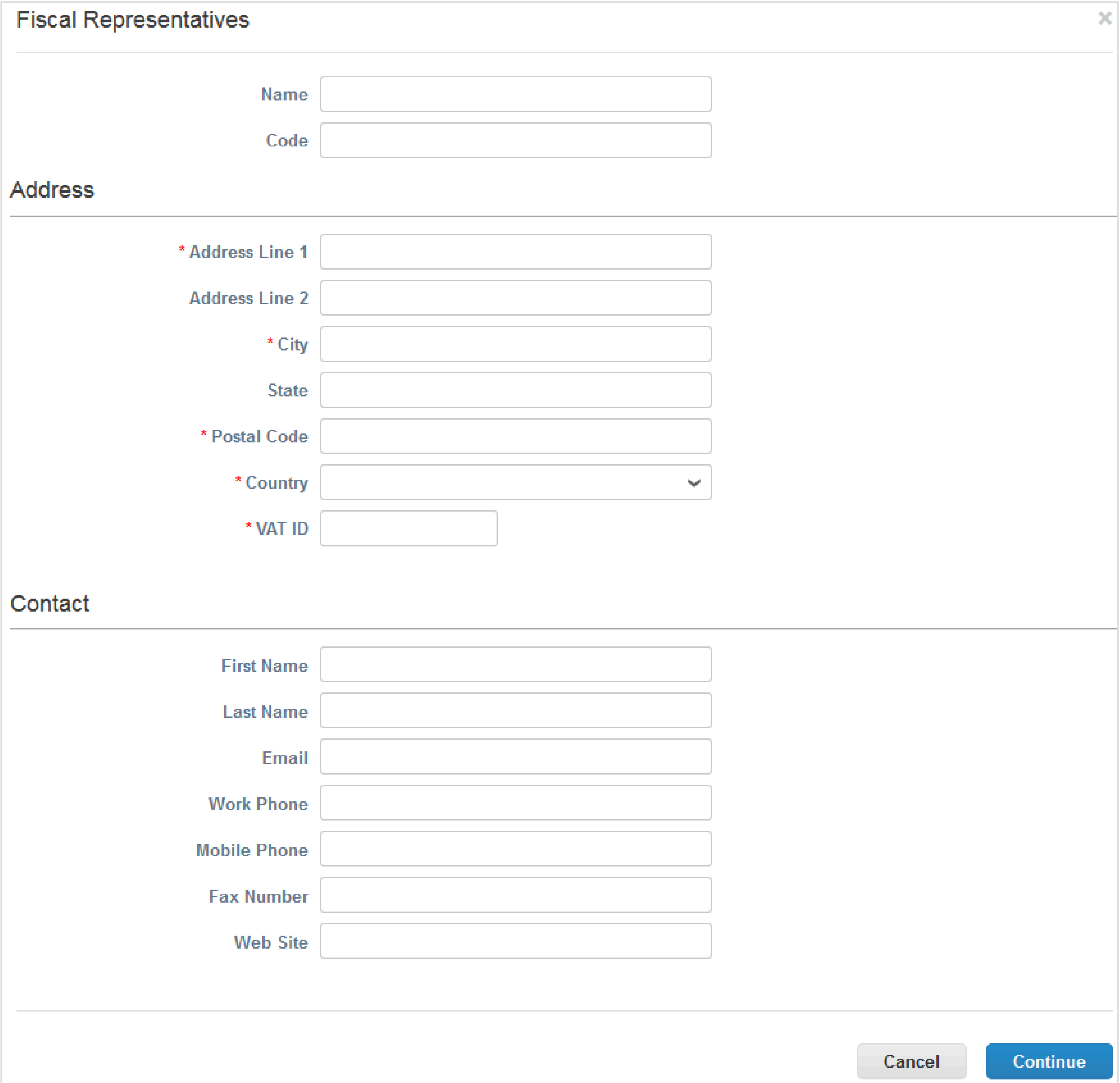
If you add a fiscal representative, this is associated with a tax registration number that you set up when adding a legal entity. For more information, see Set up Legal Entities.

> **Note:** Add fiscal representatives before setting up a legal entity. This ensures that you can assign your fiscal representative to your legal entity.

On the left of the **Admin** page, click on the **Fiscal Representatives** link and on the **Add Fiscal Representative** button.



In the appearing window, fill in at least the mandatory (address) fields (marked with a red asterisk): address line 1, city, postal code, country/region, and VAT ID.



The entry appears in the table on the **Admin Fiscal Representatives** page. Click on the **Manage** button in the right corner of the table to manage/edit the information for your fiscal representative.

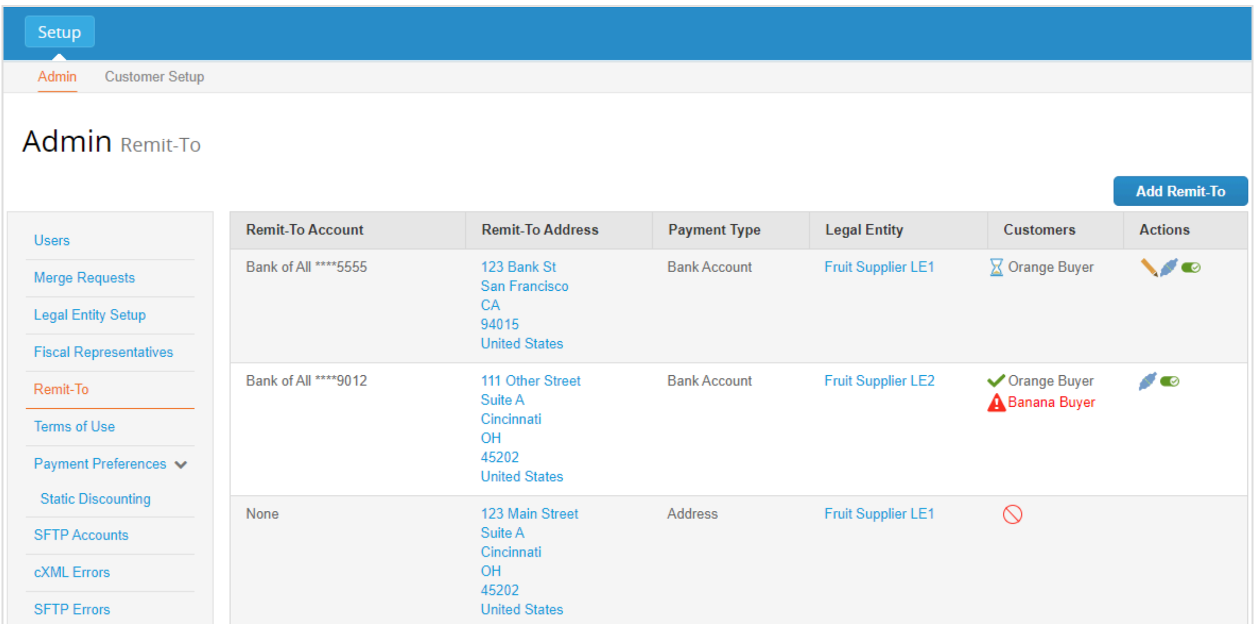
View and Manage Remit-to Information

Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information. If you want to do business with a customer who enabled compliant invoicing, you need to provide the necessary information.

You are required to add a remit-to address when setting up (adding a legal entity for) electronic invoicing or creating invoices. For more information, see Set up Legal Entities and Create or Edit an Invoice.

View remit-to accounts

Go to **Setup > Admin > Remit-To** to view the list of remit-to accounts and their details: associated remit-to address and legal entity, payment type, the (up to five) customer(s) they are assigned to, and possible actions (update, share, and disable).



Icons in the **Customers** column indicate the status of the remit-to accounts.

The most recently added remit-to account is at the top of the list.

Manage remit-to accounts

You can add new, or update, share, or deactivate existing remit-to accounts by going to **Setup > Admin > Remit-To**.

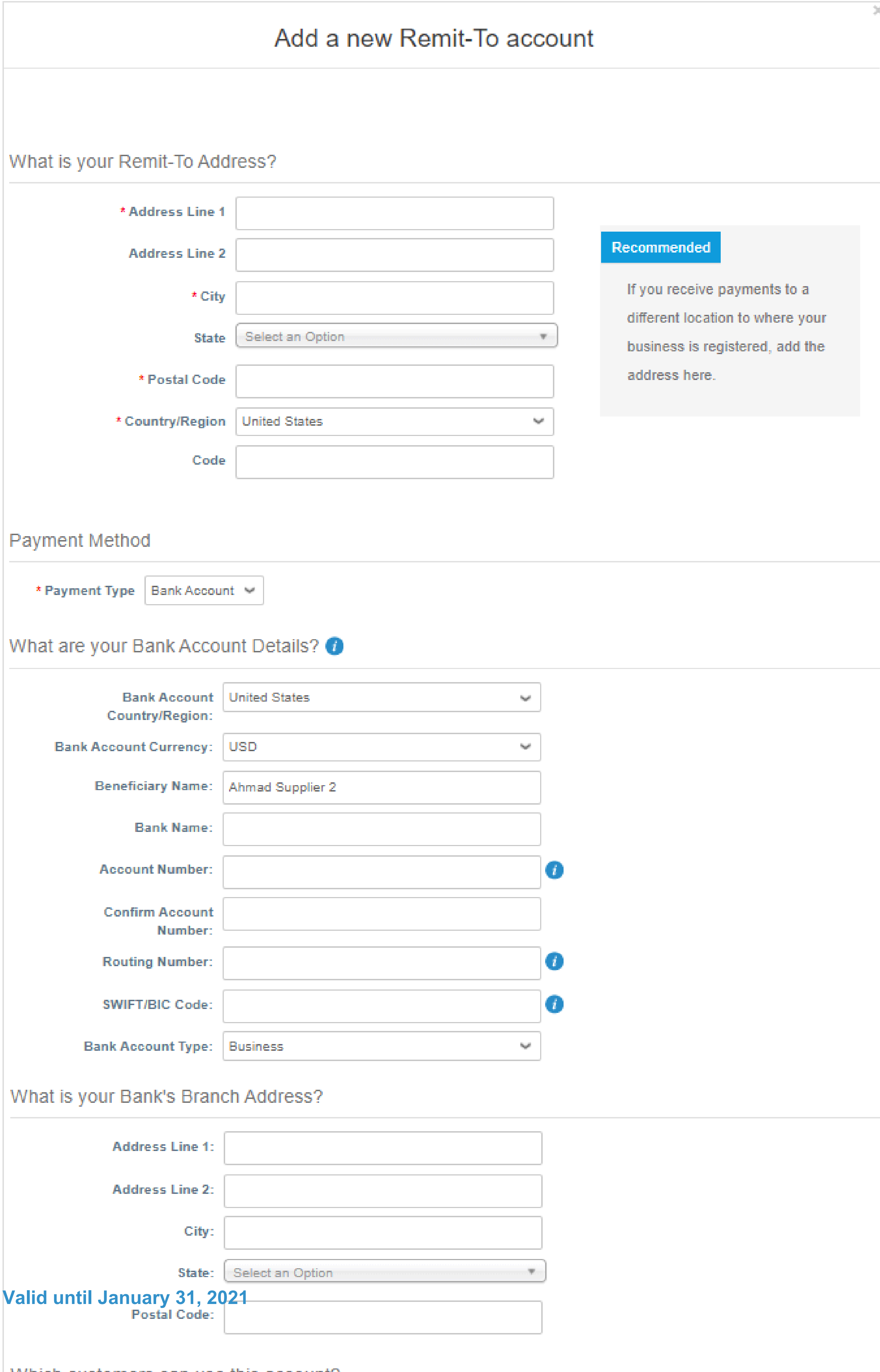
Add

To create a new remit-to, click the **Add Remit-To** button, select the legal entity to be associated with it, and click **Next**.

> **Note:** If only one legal entity is active, it is selected by default and you cannot change it.

You can add remit-to accounts also from the **Setup > Admin > Legal Entity Setup** page. Click on the **Actions** button, select **Manage Remit-To Accounts**, and in the appearing **Add a new Remit-To account** window, click **Add Remit-To**.

In the appearing **Add a new Remit-To account** window, fill in at least the mandatory address fields and select a payment type (marked with a red asterisk).


Add a new Remit-To account
What is your Remit-To Address?
* Address Line 1
Address Line 2
* City
State
Select an Option
* Postal Code
* Country/Region
United States
Code
Recommended
If you receive payments to a different location to where your business is registered, add the address here.
Payment Method
* Payment Type
Bank Account
What are your Bank Account Details?
Bank Account Country/Region:
United States
Bank Account Currency:
USD
Beneficiary Name:
Ahmad Supplier 2
Bank Name:
Account Number:
Confirm Account Number:
Routing Number:
SWIFT/BIC Code:
Bank Account Type:
Business
What is your Bank's Branch Address?
Address Line 1:
Address Line 2:
City:
State:
Select an Option
Postal Code:

For more information about the fields, see Set up Legal Entities.

If the selected payment type is **Bank Account**, you can see fields for bank account details that are relevant to the selected bank account country/region.

Bank account fields are validated.

> **Tip:** Tooltips marked with the Info ( ) icon provide information about the valid format for the fields.

If you enter an invalid format in a field, the field is highlighted in red and information about the expected format is displayed in red text under the field.

Click **Save and Continue**. The new remit-to account is added to the list.

> **Note:** When you try to save a remit-to account with invalid fields, you can see an error message. You can decide to ignore the errors and save the account anyway; however, it is not recommended as it may result in delayed processing for the affected customer(s).
>
> You can save an invalid remit-to account only once; later you are required to correct the invalid fields.

Invalid remit-to accounts are marked with red in the **Customers** column and a tooltip provides details about the error.

Deactivate, Update, or Share

To deactivate a remit-to account, click **Manage** in the **Add a new Remit-To account** window, and then click **Deactivate**

Remit-To. You can deactivate remit-to accounts also from the **Admin / Remit-To** page by clicking the **Disable** ( ) icon in the **Actions** column.

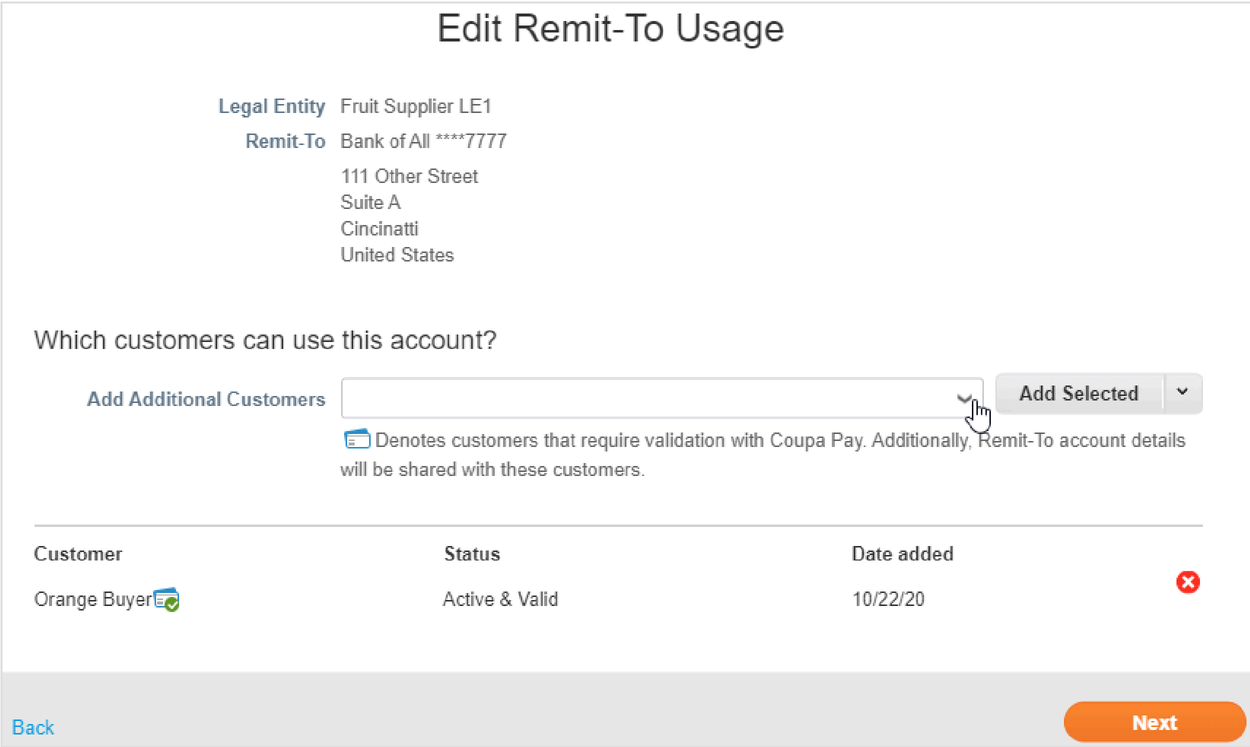
Deactivating a remit-to account also deactivates the corresponding supplier payment account on your Coupa Pay customer side. If the deactivation is unsuccessful, you are informed about it in a message bar.

> **Note:** Deactivation cannot be undone, so you are asked to confirm the action.

Click the **Update** ( ) icon to update remit-to information, for example, to correct invalid fields.

> **Note:** After you submit the updated remit-to information, a new remit-to account is created and the original account is deactivated.

You can share your remit-to accounts with some or all customers. Click the **Share** ( ) icon and in the appearing **Edit Remit-To Usage** window, select the customer(s) from the **Add Additional Customers** drop-down list, and click **Add Selected**. To share it with all your customers, select **Add All** from the **Add Selected** drop-down.



Note: If you merge accounts, your remit-to addresses are not merged unless you make them available for all customers. Once the merge is complete, you can assign the remit-to address to the specific customer(s) again.

Add remit-to addresses to your SIM form response

Your customer might request you to add a remit-to address to your Supplier Information Management (SIM) form response. You can create a new remit-to address or choose an existing one from the legal entities.

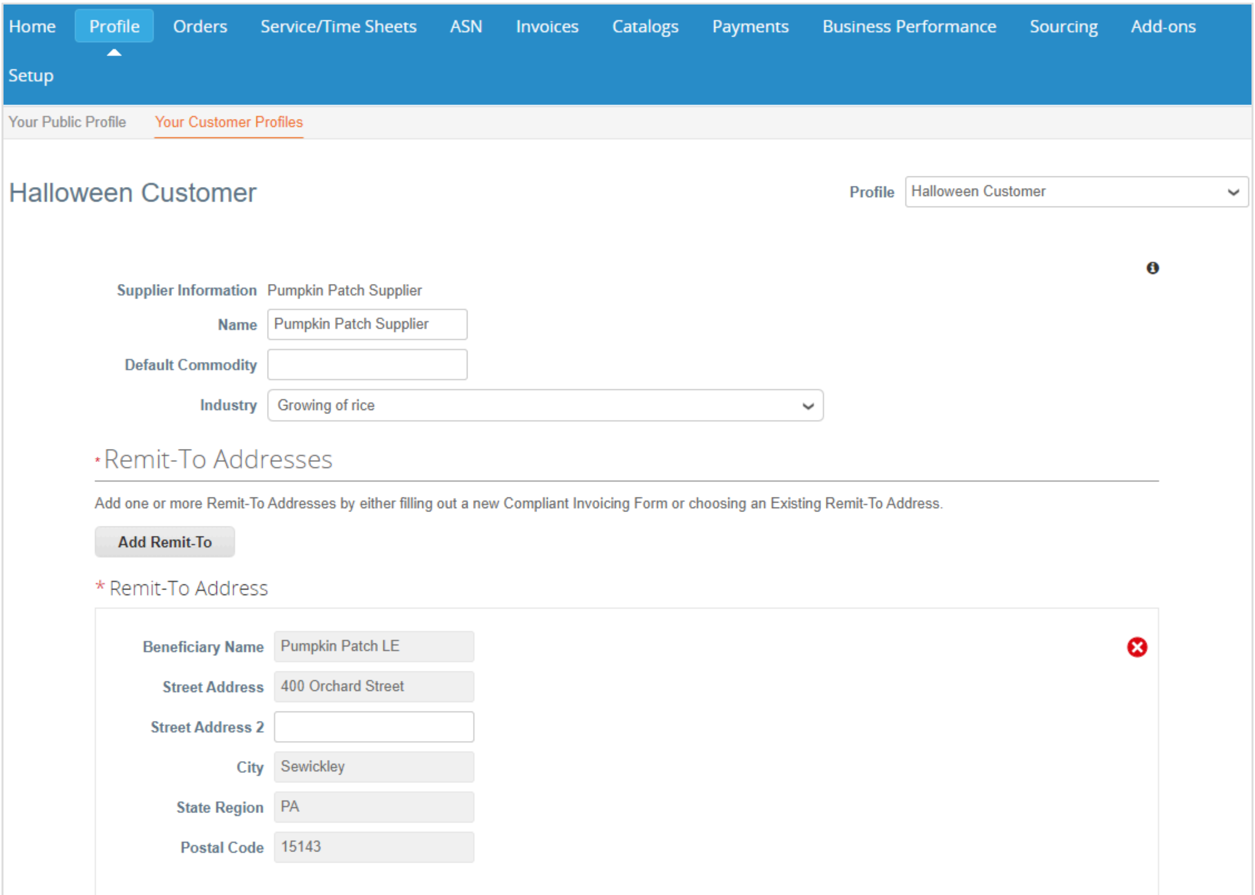
Go to your customer profile in the CSP to fill in/update your supplier information by doing one of the following:

- Click on the **View Online** button in the **Update Profile** email notification from your customer.
- Go to **Notifications** and click on the **Update your profile for [Customer Name]** link in the CSP.
- Go to **Profile > Your Customer Profiles** in the CSP and select the customer for whom you want to update your profile.

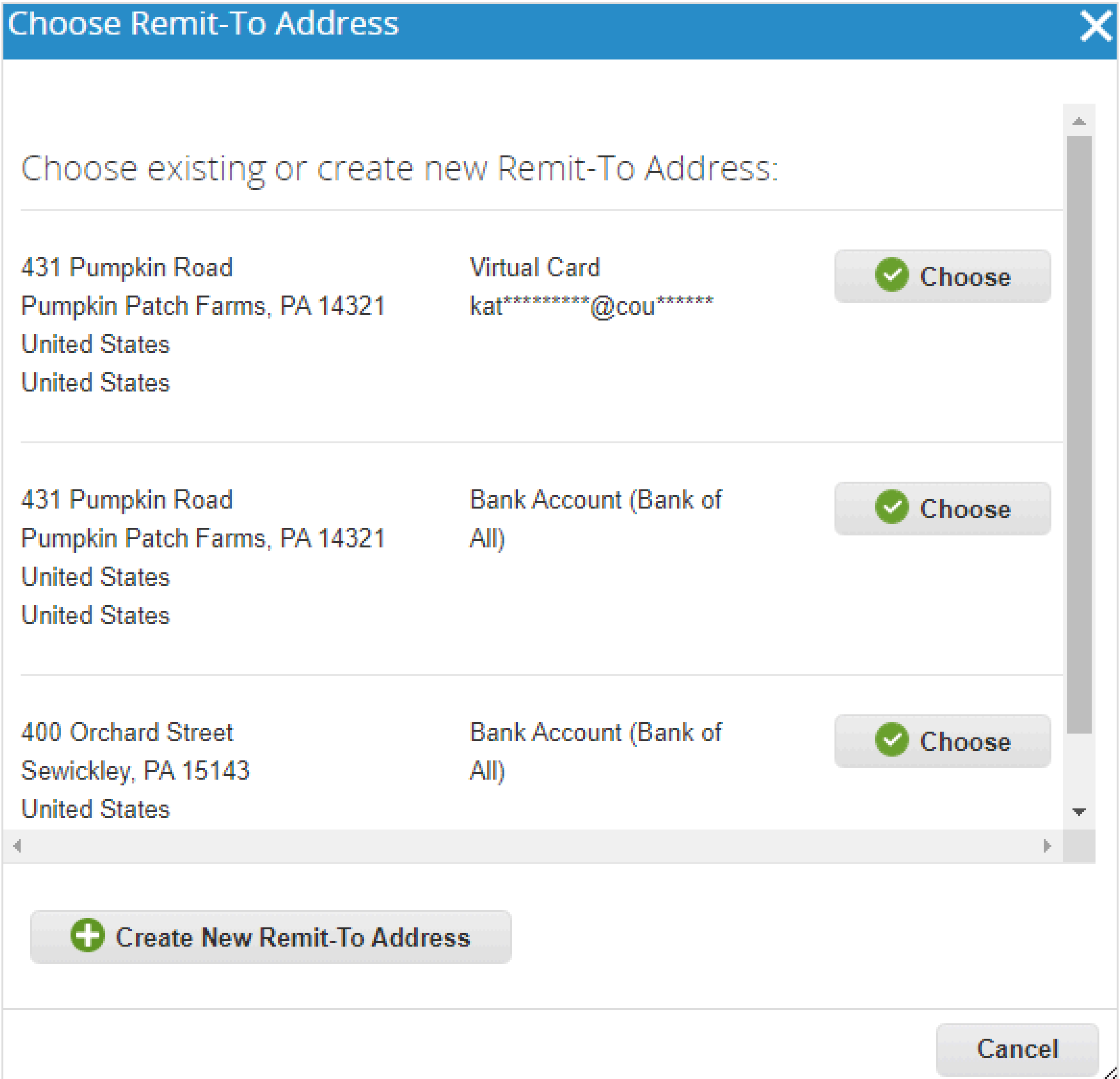
On the appearing page, click **Add Remit-To** to add a new or an existing remit-to address to SIM. You can add one or more remit-to addresses.

If you already provided remit-to information to your customer, for example, on an invoice, the **Remit-To Address** fields are pre-populated based on the most recently used or created remit-to. If you added multiple remit-to addresses and your customer requests more remit-to addresses, all of them are pre-populated.

If your customer marked the **Remit-To Address** section to be mandatory when creating the form, there is an asterisk next to it, and you cannot submit your response without providing the remit-to address.



The **Choose Remit-To Address** window lists all the remit-to addresses that you already created in the CSP as part of your legal entity to be used for e-invoicing and payment.



When you choose an existing remit-to address, the new remit-to address is created for SIM and its fields are pre-populated with data from the chosen remit-to address. Remit-to addresses that are no longer valid are marked with a red icon and a tooltip provides details.

> **Note:** From among populated fields, only bank fields and empty fields are editable.

You can see only those fields that your customer who requests the SIM response included in the **SIM Remit-To** subform, for example, location code, address, bank and account information, and whether the remit-to address is active or inactive.

All the fields with validation have the **Info** icon () with a tooltip to provide guidance on the requested information.

If you see invalid fields, update your remit-to address for your Coupa Pay customer(s).

After filling in the fields, submit your form; you can update it any time.

You are notified in the message bar and you receive an email notification of the successful update, and the new remit-to address is added to the top of the remit-to address list.

If you want to create a new remit-to address from the CSP, you are directed to **Legal Entity Setup**.

Unlike when creating a remit-to address for e-invoicing in the CSP, when adding a newly created remit-to address to SIM, you can decide to add it to your customer profile immediately or later on the **Setup Complete** page.

Click on the **Add Now** button to add the newly created remit-to address to the SIM form response.

> **Note:** If you click **Add Later**, the new remit-to address is not added to the form, but you can select and add it later.

You can fill in your SIM form response also through Supplier Actionable Notifications (SAN) by creating a new remit-to address.

> **Note:** Deactivating a legal entity on the CSP does not deactivate the remit-to address on SIM.

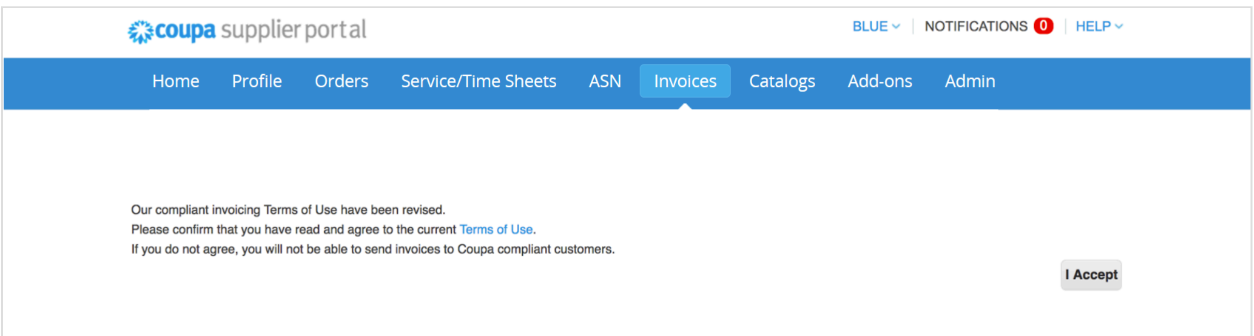
Terms of Use

To use the CSP and to allow Coupa to create invoices on your behalf when you use compliant e-invoicing, you must sign the Coupa Open Business Network legal Terms of Use. Otherwise, you cannot create and submit invoices through Coupa and the CSP.

The legal terms of use lists the terms and conditions for using e-invoicing through Coupa and the CSP. You as a supplier, especially if you are responsible for managing legal tax invoices, are required to have read, assessed, and agreed to these terms of use and to be aware of your responsibilities towards the content and handling of these invoices.

To issue a legal compliant invoice, you need to set up a remit-to address for a compliance country. When you use a compliance country remit-to address for the first time, Coupa validates if you have signed the latest terms of use.

If the Terms of Use has not been signed yet or there is an updated version of the Terms of Use, you are prompted to review and sign it.



Your customer can notify you in an email of an updated version of the Terms of Use. You can use the embedded link to review and sign the legal terms of use.

The Terms of Use is available when you register and log in to the CSP for the first time, when you are notified in the CSP of an updated version, and any time on the left of the **Admin** page and in the table below.

Time Period	Terms of Use
March 1, 2017 - Present	Coupa_Open_Business_Network_Terms_of_Use_v.2_28_17.pdf - last updated: February 28, 2017
Dec 1, 2016 - Feb 28, 2017	Coupa_Open_Business_Network_Terms_of_Use_v.11_30_16.pdf - last updated: November 30, 2016

Set Static Discounting Preferences

Overview

Coupa Static Discounting helps you to get paid earlier by allowing you to set and update preferred accelerated payment terms (early payment discounts terms) and by applying those terms automatically to all or selected Coupa customers across some or all your invoices and/or purchase orders. Your customers can also set payment terms specific to you.

> **Note:** You can use Coupa Static Discounting successfully only if your customers have it enabled.

You receive notifications of customers who are ready to accept early payment discount offers, and you can set your payment terms directly from the CSP notifications or accelerate from a PO email.

You can change a net payment term (for example, Net 60) to a discount payment term (for example, 2%/20 Net 60).

> **Note:** Coupa Static Discounting only changes payment terms. It is at your customers' discretion whether to pay the invoice early and take the discount, or to pay the full amount in the net term days.
>
> Coupa Static Discounting does not update existing early payment discount terms. It only updates net payment terms to early payment discount terms as you selected. Thus, it does not change a 2%/10 Net 30 term to 1%/10 Net 30. It only changes Net 30 to 1%10 Net 30.

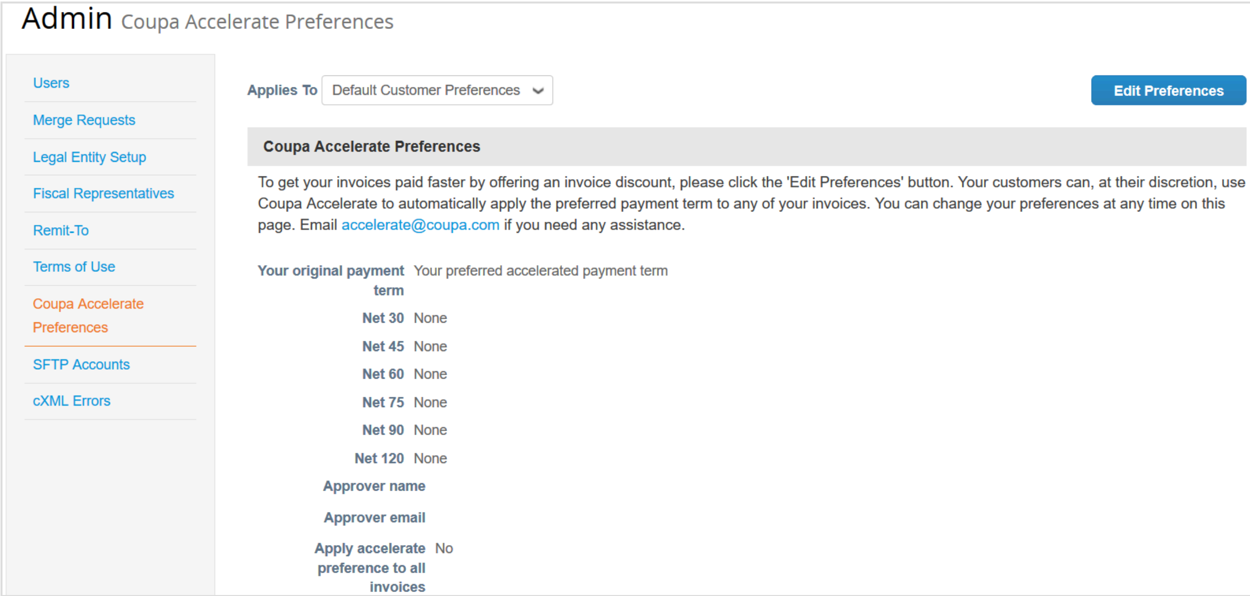
If you always prefer early payment discounts on your Coupa purchase orders and invoices, set your Static Discounting preferences to apply to all invoices. If you only prefer early payment discounts on some transactions, set those discounts on the specific orders and invoices.

Setting the Static Discounting preferences to apply to all invoices means changing a net payment term on a Coupa transaction (for example, a Net 60 payment term on an order or an invoice) to the discount payment term chosen on the **Coupa Accelerate Preferences** page (for example, 2%/20 Net 60) for all invoices in Coupa, regardless of whether there is a purchase order or what channel the invoice is submitted through. (Invoices can go to Coupa from the CSP, on paper, in emails to the buying company, and through automated data feeds.) This option ensures that you get faster payment on as many invoices as possible through the CSP, and it is recommended if you want accelerated payments on non-PO invoices.

If you do not choose to set the Static Discounting preferences to all invoices, Coupa only applies the discount payment term to an invoice from an order that has an accelerated discount payment term. This option is recommended if you want your accelerated preferences to be applied only to invoices from purchase orders to ensure that the payment terms on your original invoices match the payment terms in Coupa before you create the invoice. If the payment term you selected matches one of the discount terms on your Coupa customer side, that discount is automatically assigned to the transaction, that is, to the Coupa purchase order you receive or the invoice you send through the CSP, Supplier Actionable Notifications (SAN) (creating invoices from PO emails), or other invoicing channels.

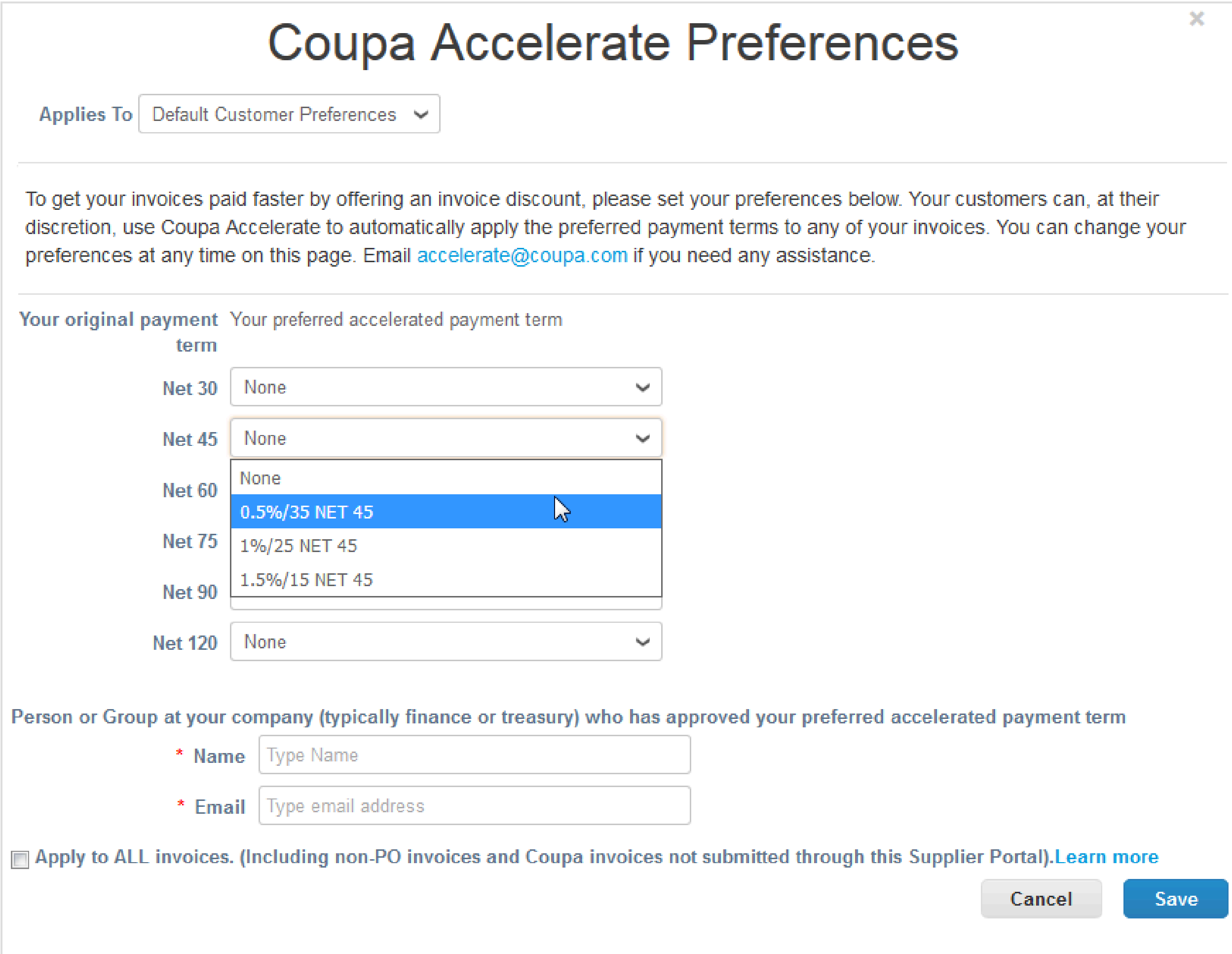
View and set payment terms

Click on the **Coupa Accelerate Preferences** link on the left of the **Admin** page.



Click on the **Edit Preferences** button in the top right corner. Fill in the mandatory name and email fields, and select your preferred accelerated payment terms to be applied to all your customers by default if **Default Customer Preferences** is selected. If you have customer-specific payment terms, you can also modify them on this page after selecting the specific customer from the **Applies To** drop-down.

You can choose from a standardized list of possible discounts for each term length.



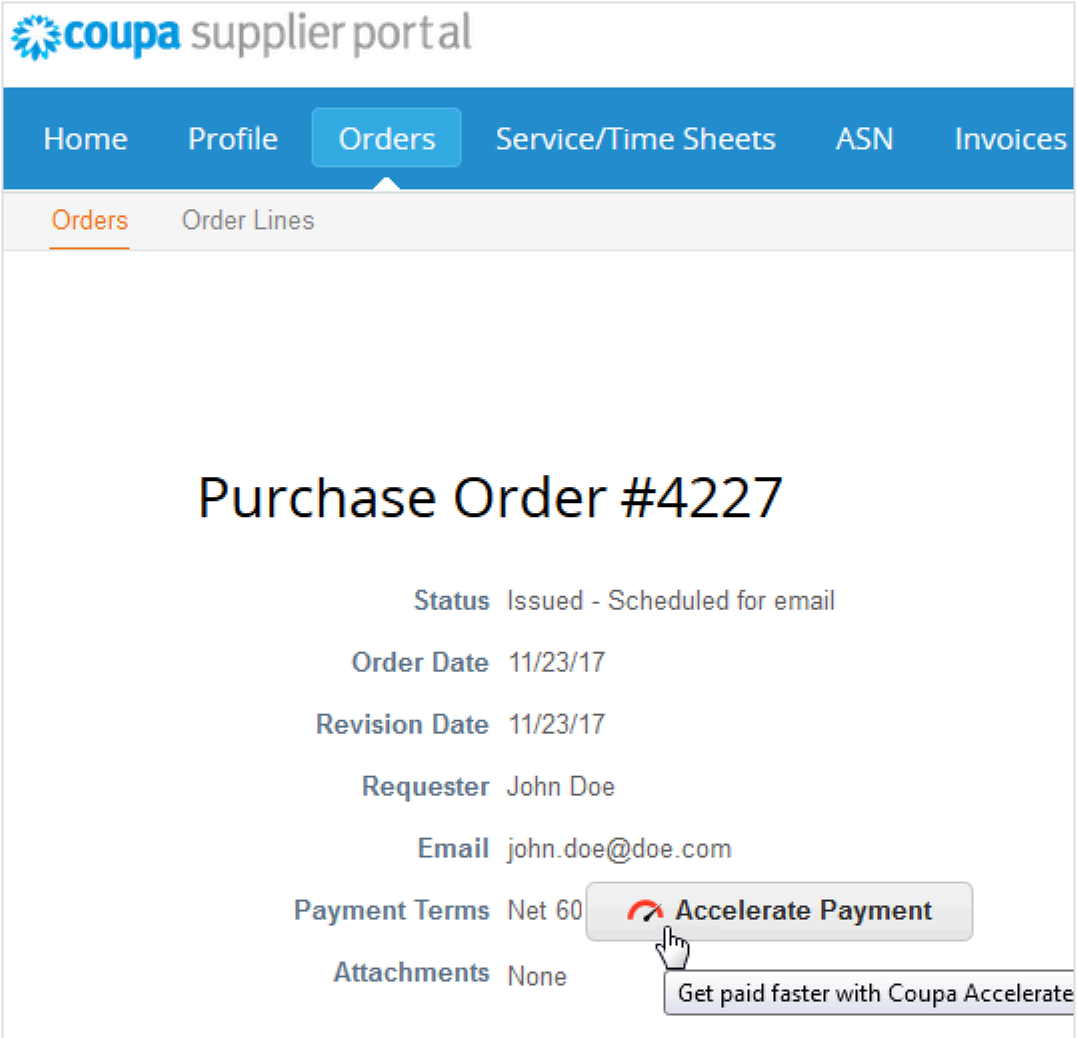
For a specific transaction (purchase order or invoice), you can choose to change a net payment term (for example, Net 60) to a discount payment term (for example, 2.5% 10 Net 60) if your customer's configured **Payment Terms** is enabled for these Coupa-preferred payment terms. You can "accelerate" the order or the invoice.

If your choice matches one of the discount terms on the customer side, that discount is automatically assigned to the transaction.

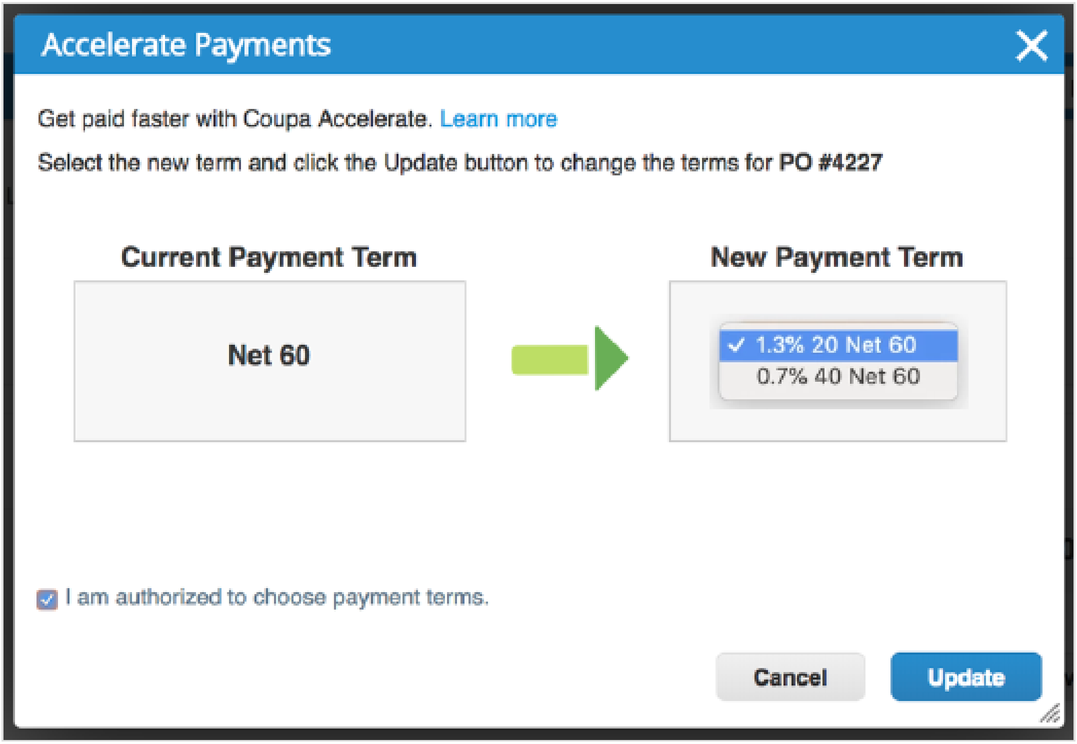
Select the **Apply to ALL invoices** checkbox to apply your Coupa Accelerate preference to all invoices, including non-PO backed invoices and invoices sent to your Coupa customer through cXML, email, and so on.

Accelerate orders or invoices

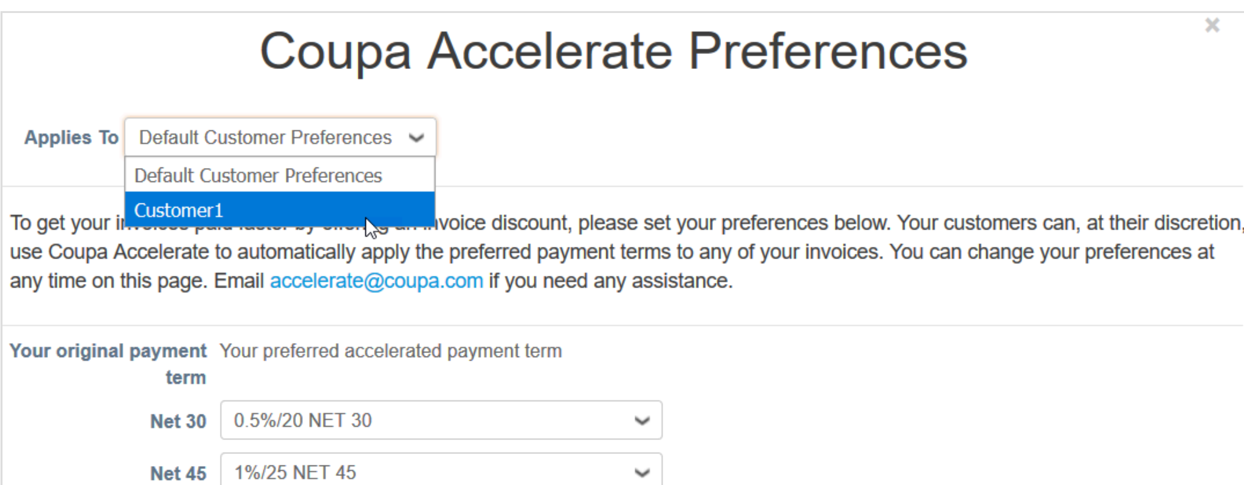
Open the order/invoice and click on the **Accelerate Payment** button next to the **Payment Terms** field.



In the appearing **Accelerate Payments** dialog box, select a payment term from the available options and click **Update**. Your customer might have assigned payment terms specific to you. Only those payment term options are visible that have the same net payment terms as your default.

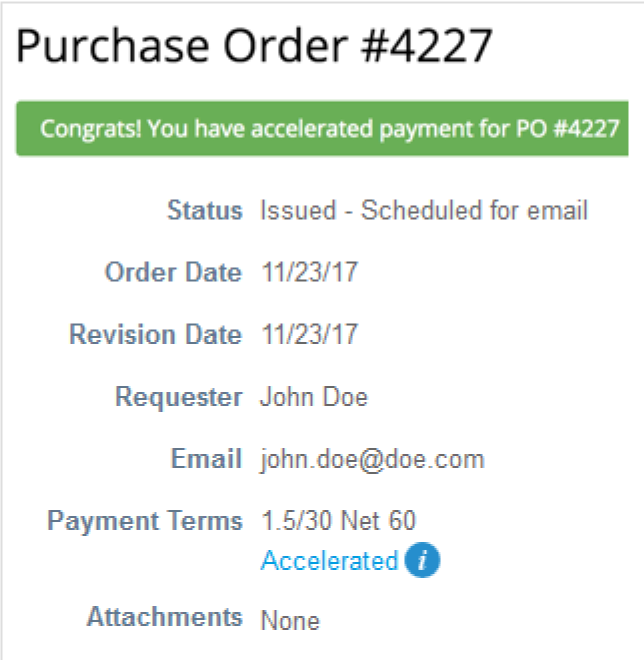


If you accept the terms, you are asked in a popup if you want to update your default Coupa Static Discounting payment preferences on all the future orders and invoices with the specific customer. If you decide to **Update** them, you are directed to the customer-specific **Coupa Static Discounting Preferences** page. Here, you can also choose to apply your discount payment terms globally to all customers by selecting **Default Customer Preferences**.



Note: Customer-specific payment term preferences override default customer preferences.

The new payment term is applied and your order is accelerated.



Note: Accelerated payment terms automatically apply to invoices created against accelerated orders.

When an accelerated payment term is applied to an order or an invoice, that payment term is available on the order or the invoice and it has the **Accelerated** flag. You are notified of the action in the message bar and the change is recorded in the **History** section.

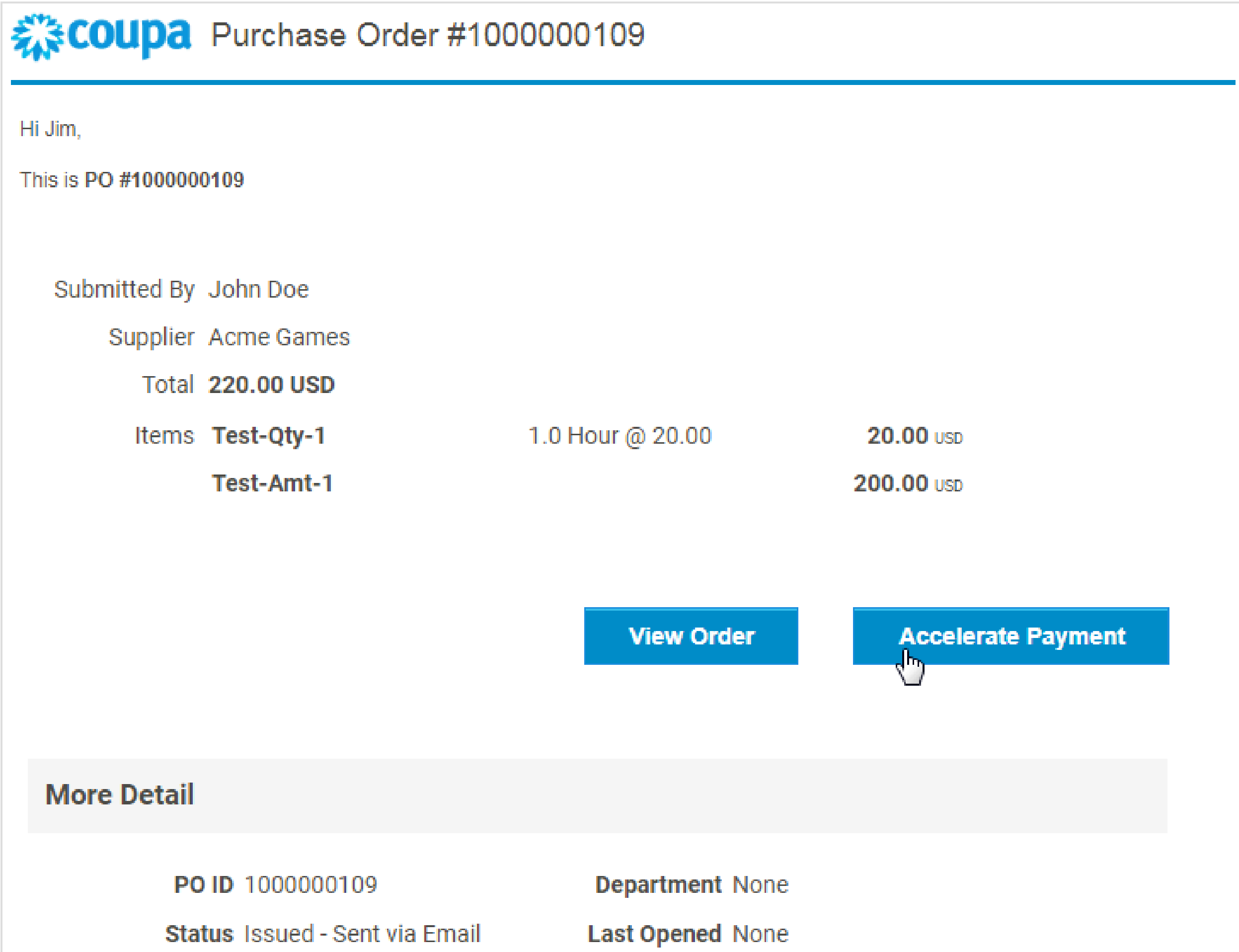
For a specific transaction, if one of the listings in your customer's **Payment Terms** table matches your selected preferred discount, that invoice or order is automatically marked as "Accelerated". If there is no match, you can see the **Accelerate Payment** button in the **Payment Term** field of the invoice. Clicking on it allows your customer to select from their list of authorized payment terms.

Accelerate orders from PO emails

You can accelerate orders directly from PO emails if:

- Your customers enabled Coupa Static Discounting.
- You set accelerate preferences.
- POs have net terms that can be accelerated.
- Your customers set up matching payment terms.

Click on the **Accelerate Payment** button in the PO email.



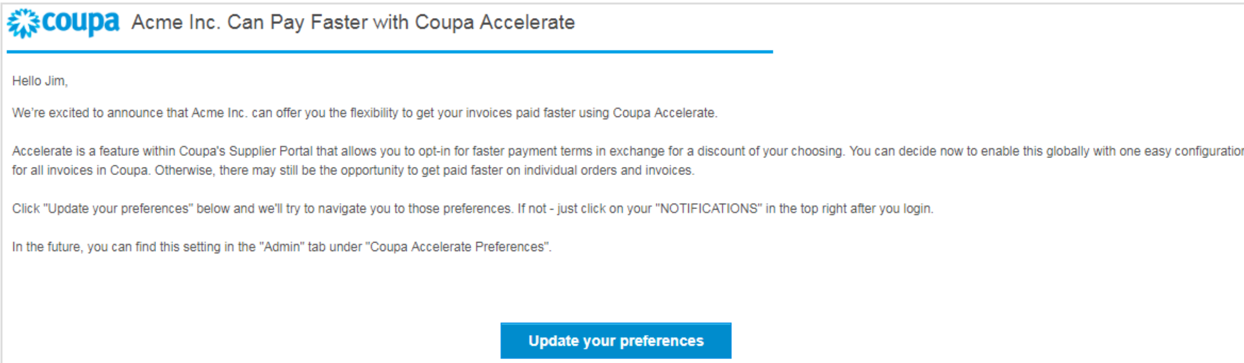
From the email, you are directed to the PO and the **Accelerate Payment** dialog box appears. For more information, see Accelerate orders or invoices.

Notifications

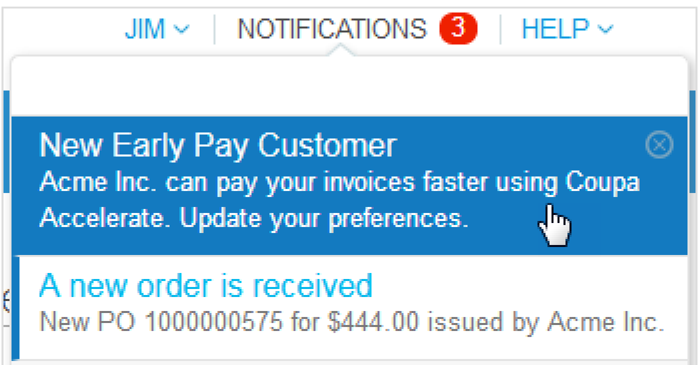
If your customers turn on Coupa Static Discounting and you are linked to the CSP, you receive notifications of the early payments opportunity. Depending on your notification preference settings, you receive email, online, and/or SMS notifications.

> **Note:** Notifications are sent within 24 hours after your customers enable Coupa Static Discounting.

Email notification



Online notification



When you click on the **Update your preferences** button in the email notification or on the **New Early Pay Customer** notification in the CSP, you are directed to the **Coupa Accelerate Preferences** page where you can set your payment terms.

Create SFTP Accounts

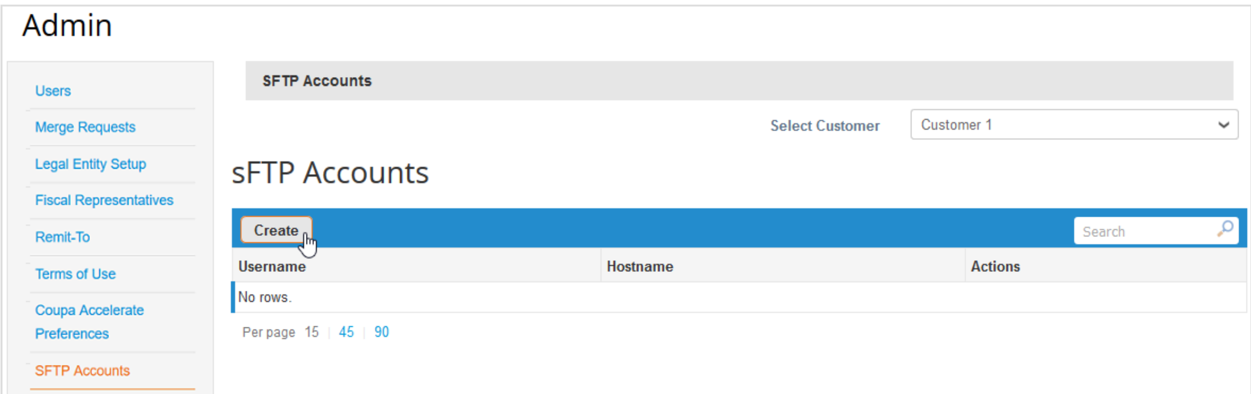
You can create and manage your SFTP accounts for loading invoices for your customer(s) that have not disabled this feature.

Tip: Before starting to create SFTP accounts, ensure that your customers support invoicing and this functionality.

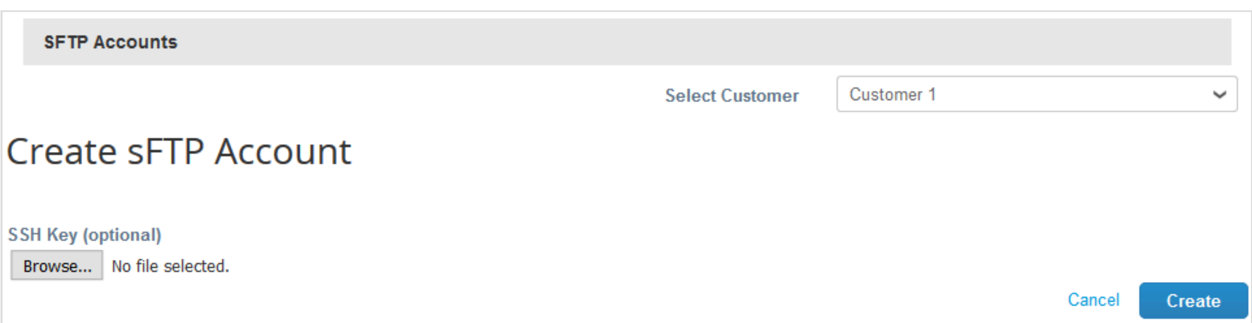
Click on the **Admin** tab on the main menu. On the left of the **Admin** page, click on the **SFTP Accounts** link.

On the **SFTP Accounts** page, select a customer and click **Create**.

Note: You can create only one account for each customer.

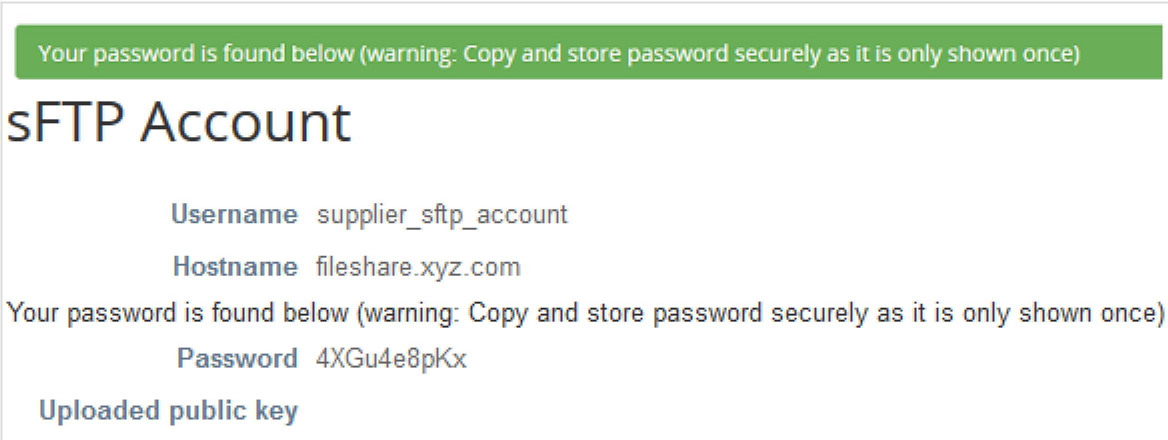


On the appearing **Create sFTP Account** page, you can choose the file with your own SSH public key to upload, or you can create the account and Coupa generates a password for you.



The SFTP account is created.

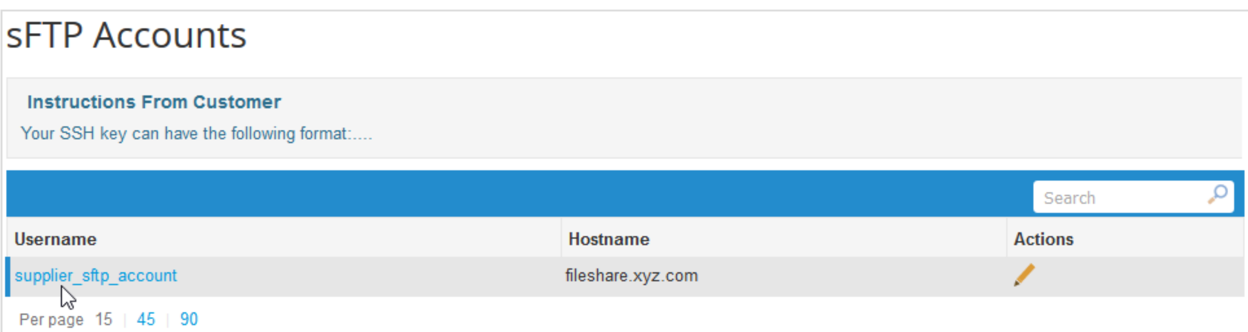
If a password is generated for you, you can see it in the **Password** field.



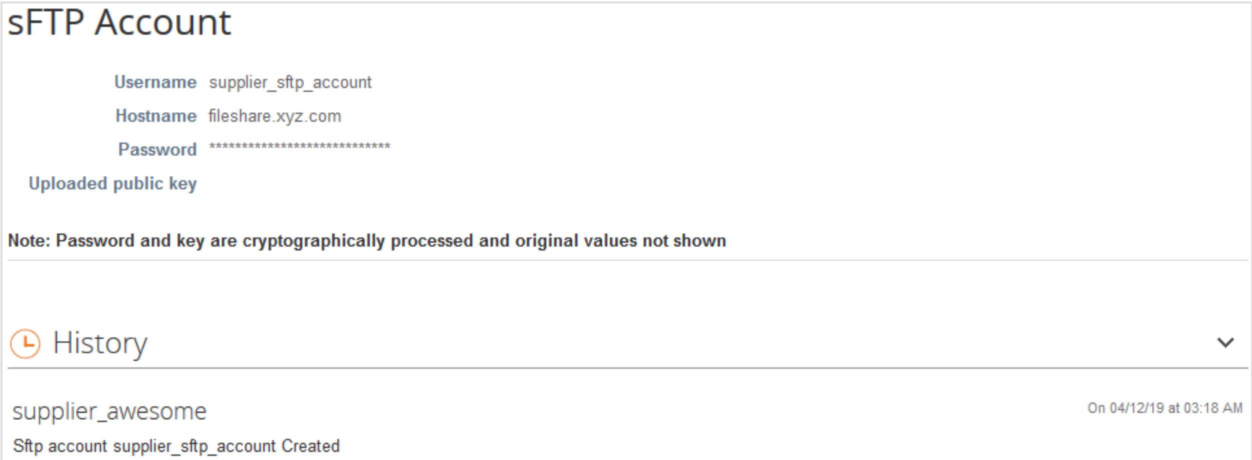
Note: Write down your password because it is not revealed when you view your account.

The newly created account is listed in the **sFTP Accounts** table with username and hostname. The username is generated automatically and cannot be modified.

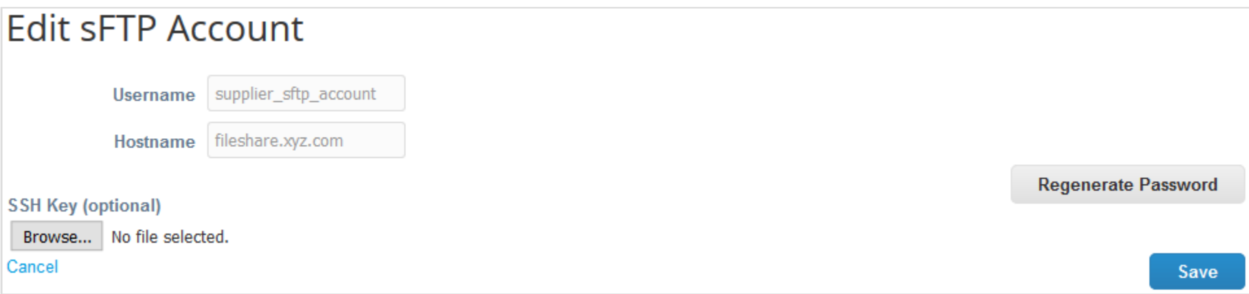
Tip: Your customers can provide instructions to help you. If they do, you can see those on the **sFTP Accounts** page above the table.



Click on the username link to view details of the SFTP account, including the history.



You can also edit the account by clicking on the **Edit** ( ) icon in the **Actions** column. You can upload SSH keys (one for each of your customers) to replace previous keys, or you can regenerate passwords.



When you have an SFTP account and password, you can start uploading your invoices.

Note: You need to have an SFTP client, for example, Filezilla or Cyberduck, to make the connection and transmit invoices through SFTP.

Tip: If you have an SFTP account, you can view SFTP file upload errors.

View cXML Submission Errors

If you use cXML for PO and invoice submissions to your customers, you can receive notifications of cXML transmission failures and view details about cXML errors.

> **Note:** You can view cXML errors if your customer enabled sending cXML error notifications to you and you provided a supplier integration contact.

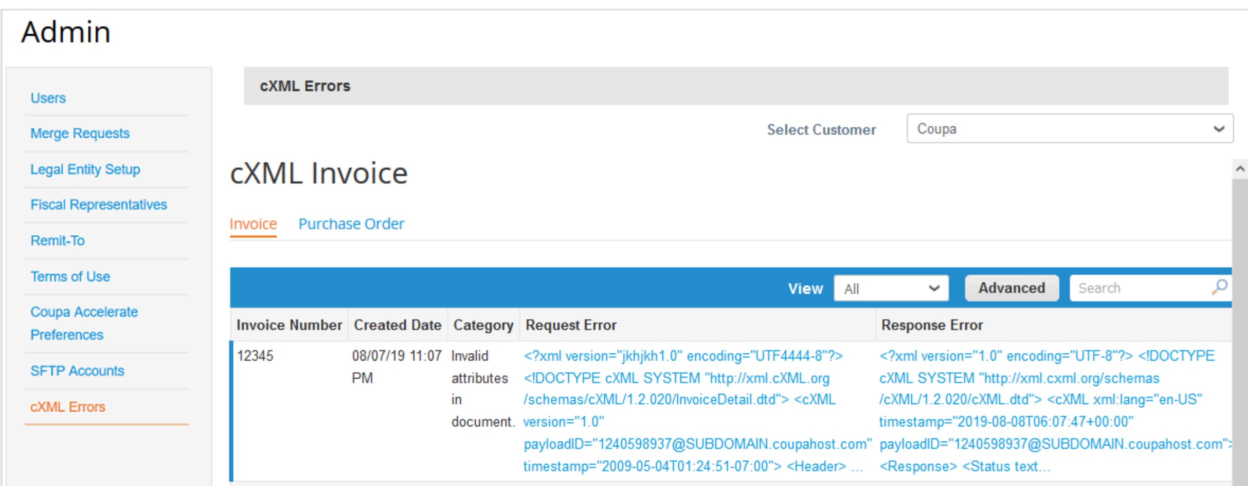
You can enable/disable cXML error notifications by changing your notification preferences for **Enable notification for integration error** under the **Integration Errors** section. For more information, see View and Manage Notifications.

> **Note:** Notifications for cXML errors are off by default.

The online notification for integration errors is **Encountered cXML error for <customer name>**.

> **Note:** A notification contains up to ten cXML errors and is sent only every 24 hours.

Clicking on the online notification or the link in the email notification directs you to the error. You can view and manage the errors for cXML orders and invoices for a specific customer by going to **Admin > cXML Errors** and selecting the customer from the drop-down list.



By default, the cXML Invoice page is shown. To view the cXML errors for orders, click on the **Purchase Order** tab.

Access Add-ons

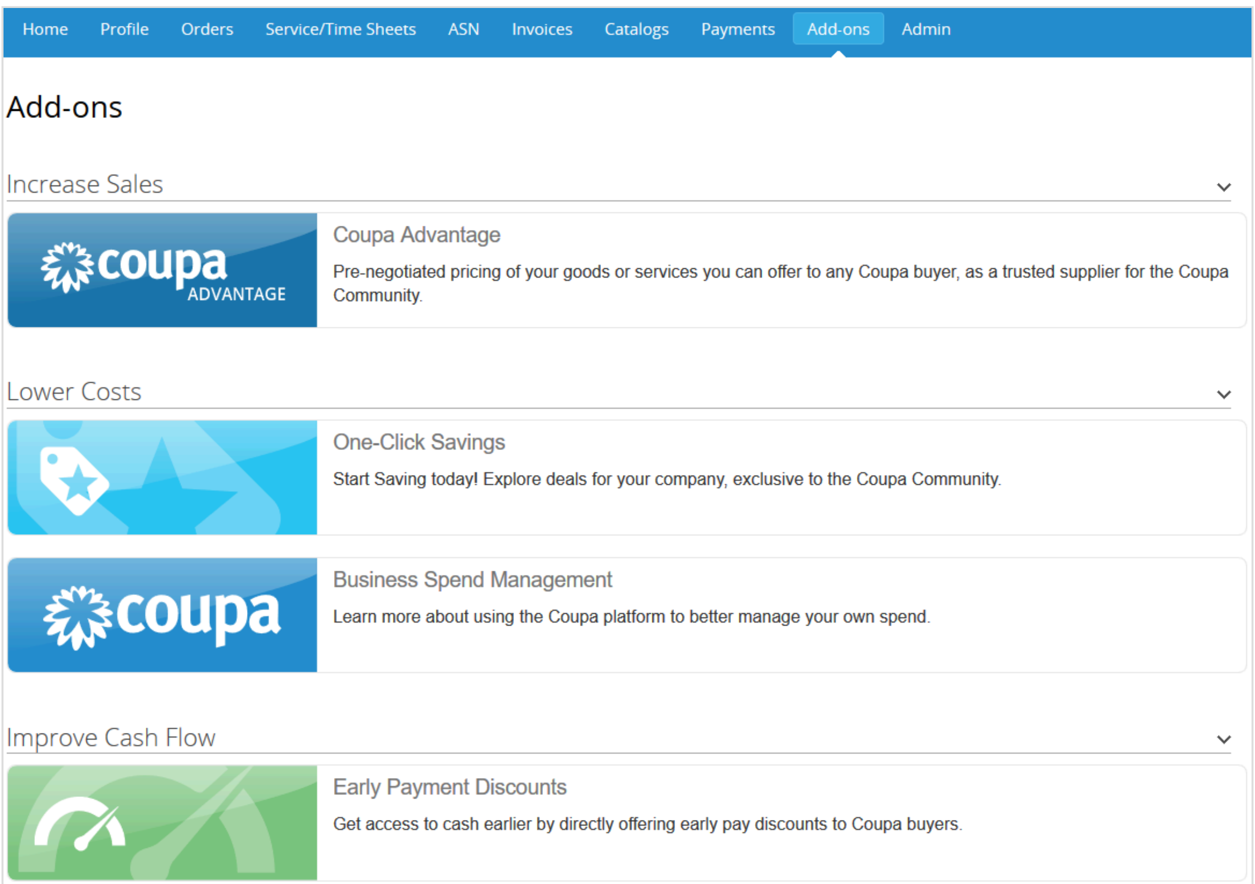
Add-ons

An add-on is a value-creating product or service that you can begin to use or express interest in using, for example, Coupa Advantage, Coupa Accelerate, or invoice financing.

As a CSP admin, you can access information about all the available add-ons and let Coupa know if you are interested in these services, and you can update your supplier profile or set your early payment discount terms, all from a single page.

> **Note:** Coupa add-ons are free.

When you click on the **Add-ons** tab, you can see the following page:



> **Tip:** You can collapse/expand each category by clicking on the arrow icons.

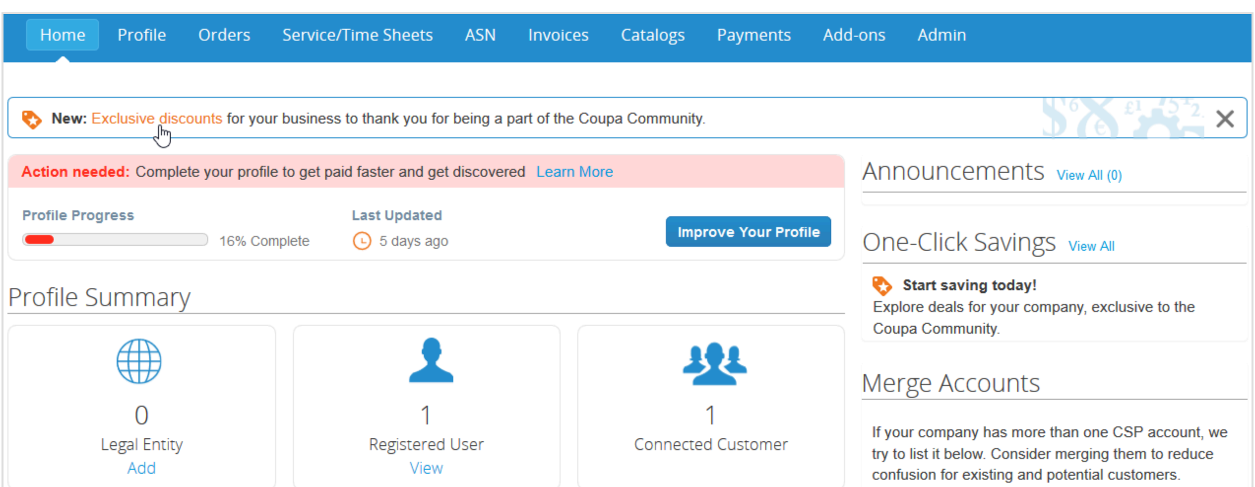
Clicking on a box (icon and text) directs you to the relevant pages to find more information about these add-ons:

Add-on	Description
Increase Sales	
Coupa Advantage	Pre-negotiated pricing of your goods or services you can offer to any Coupa buyer, as a trusted supplier for the Coupa Community. You can express interest in becoming a Coupa Advantage supplier.
Lower Costs	
One-Click Savings	New. Start saving today! Explore deals for your company, exclusive to the Coupa Community. You can learn about the Coupa Cares program, explore savings opportunities with Coupa Advantage suppliers, and express interest in becoming a Coupa Advantage supplier.
Business Spend Management	Learn more about using the Coupa platform to better manage your own spend. You can express interest in becoming a Coupa customer.
Improve Cash Flow	
Early Payment Discounts	Get access to cash earlier by directly offering early pay discounts to Coupa buyers. You can set your preferred early payment discount terms by clicking on the **Update Static Discounting Preferences** button, which takes you to the **Admin > Static Discounting** page.

One-click savings

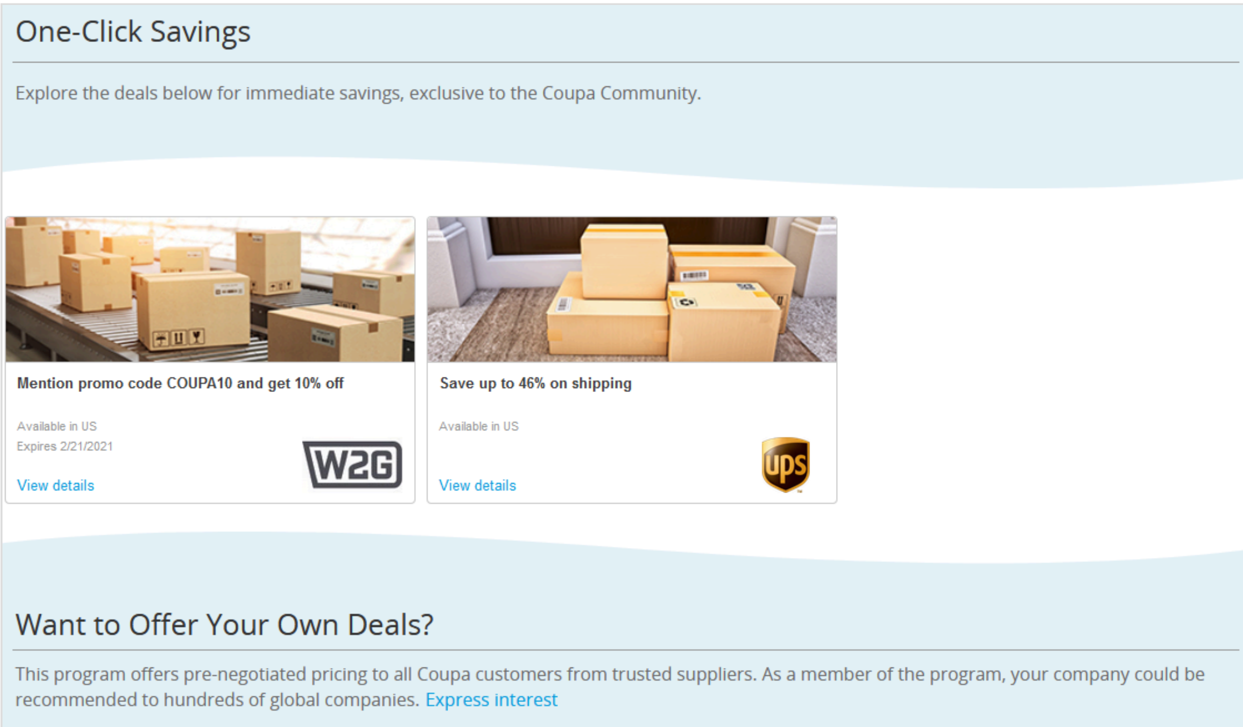
When you log in to the CSP, you can see a banner at the top of the **Home** page above the profile progress information with the following message: "New: Exclusive discounts for your business to thank you for being a part of the Coupa Community." and the **One-Click Savings** section under the **Announcements** section.

You can close the banner, but it is displayed every time there is a new offer.



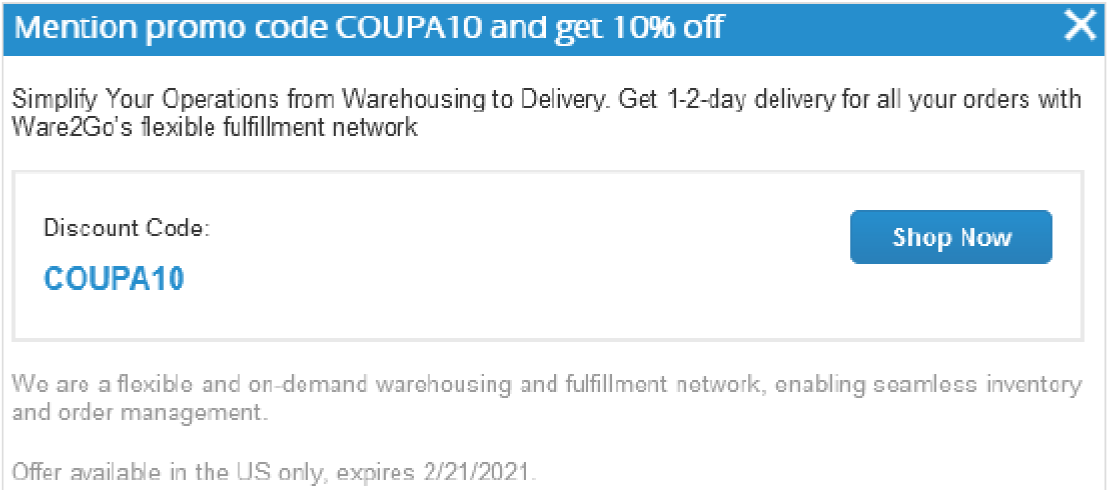
Go to the **One-Click Savings** page by clicking on the:

- **Exclusive discounts** link on the banner.
- **View All** link under the **One-Click Savings** section under the **Announcements**.
- **One-Click Savings** box on the **Add-ons** page.



View the discounts and special offers of Coupa Advantage suppliers, along with the expiration date and geographical availability (one or multiple regions) of these savings opportunities. To explore the deals, click on the **View details** link on each coupon.

- If you select a direct discount coupon, you can see more details about the supplier, the offer, and the region(s) of availability, find the discount code, and start shopping on the supplier's shopping website.



- If you select a special offer (that requires email contact for a commercial relationship to be handled outside of Coupa), you can see more details about the supplier, the offer, and the region(s) of availability, find a disclaimer with a link to the supplier's privacy policy, and send an offer request to initiate a commercial relation between you and the Coupa Advantage supplier.

When you click on the **Send Offer Request** button, the supplier and the Coupa Advantage Team receive an email with the following subject: "A Supplier is Interested in Your Coupa Advantage Offer", and a green banner is displayed with the following message: "Your request to redeem this deal has been sent to the supplier."

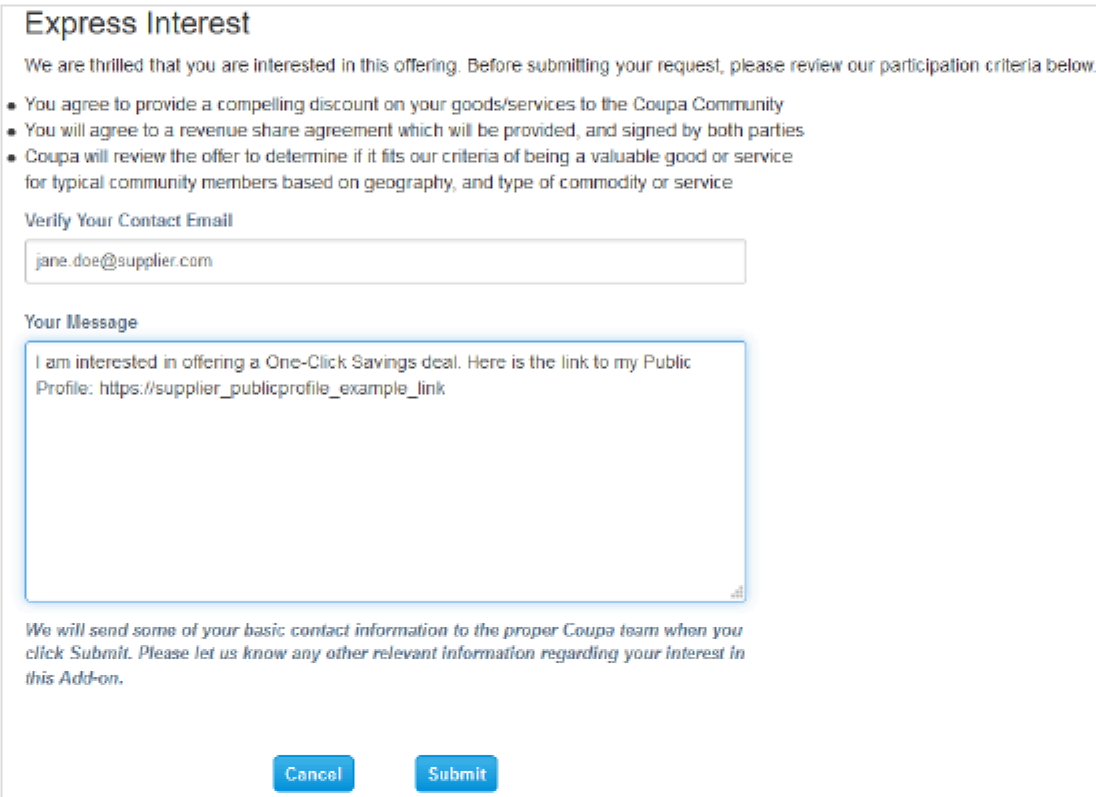
If you already sent this offer request earlier, the following message is shown: "This request has already been submitted. The supplier will contact you shortly." The other supplier does not receive an email if you try to send the same offer request within three days.

> **Note:** Your name and email are sent to the supplier whose coupon you want to use, and a representative contacts you with more details on how to redeem the offer. The processing of your data is subject to the supplier's privacy policy that is linked in the disclaimer text.

If an offer is not available in a selected region, you can see the "Sorry, there are no savings available in your region yet, check back soon, we are regularly adding new deals." message.

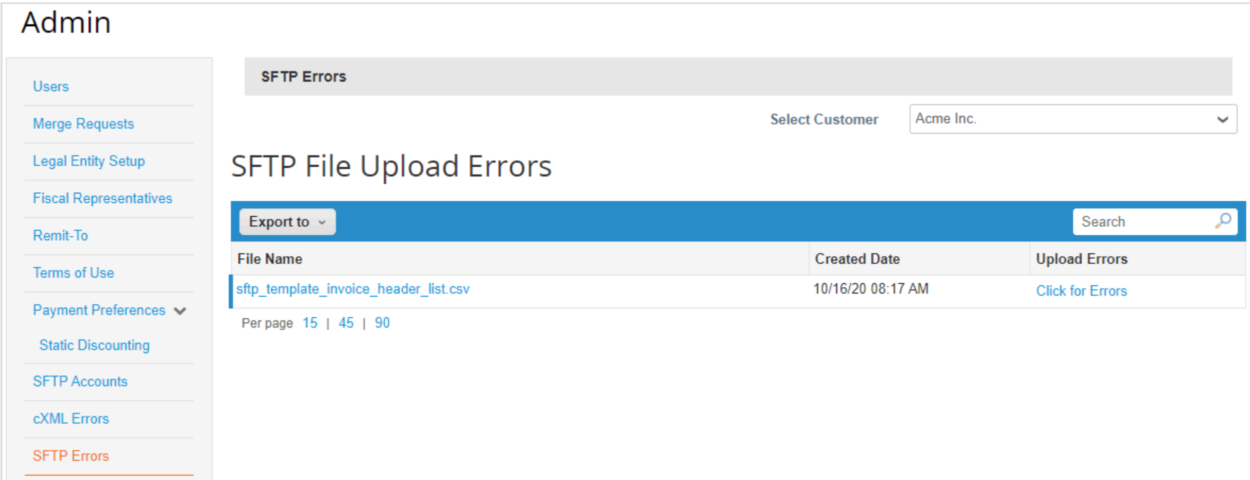
To express interest in becoming a member of the Coupa Advantage program, click on the **Express Interest** link at the bottom of the page.

Clicking on the **Express Interest** button on the **Coupa Advantage**, **Invoice Financing**, or **Coupa Business Spend Management** page generates an email message template. You can check your contact email and modify the message body if you want. Submitting the email informs the relevant Coupa team about your interest and you get a response in a couple of days.



View SFTP File Upload Errors

If you use SFPT to upload your invoices through CSV, you can view processing errors for a specific customer by going to **Admin > SFTP Errors** and selecting the customer from the drop-down list.



Click the file name links to download and view the .csv files.

Click the links in the **Upload Errors** column to see the detailed error messages. Successful file uploads are listed without the **Click for Errors** link.

For more information, see Create SFTP Accounts.

CSP FAQ and Troubleshooting

This chapter contains the following topics:

Account, Login, Registration

Find answers to questions on how to register for and log in to the CSP, and manage your account.

Admin

Find answers to questions on how to administer the CSP.

Catalogs

Find answers to questions on managing catalogs/punchouts from the CSP.

Invoices

Find answers to questions about invoicing with the CSP.

Orders

Find answers to questions about handling purchase orders in the CSP.

Other

Find answers to miscellaneous questions about the CSP.

Account, Login, Registration

How much does it cost to join the CSP?

Coupa doesn't charge suppliers to use the CSP.

Where do I register for the CSP?

You can request an invitation to join the CSP. Ask your customer to send you an invitation email or visit https://supplier.coupahost.com. For more information, see Register for the CSP.

Why don't I receive the email invitation to join Coupa?

Check your spam/junk email folder.

Emails sometimes get flagged as spam. If you still cannot find the email invitation, you can register instead. However, if you register, make sure to use the same email address to register that your customer used to invite you.

Why can't I register for the CSP?

If you received the email invitation with the link and can't register, check the **I'm not a robot** field. If there are any other issues, write to supplier@coupa.com.

How do I register if the admin/owner of the CSP account left the company?

Contact your IT department or your customer.

Your IT department can sometimes grant someone temporary access to email to log in as the Admin that left your company, and add you as a user with full access to all roles and permissions. You can also have your customer change the contact information for you as a supplier and then "unlink" from the old admin's account, then "relink" or invite using your email. All the transaction data remains. Some basic company information and payment locations/details may need to be updated in the new account, but most of the important information and transaction details are carried over automatically to the new account. For more information, see Create Your Account.

Where do I sign in to the CSP?

http://supplier.coupahost.com

How do I cancel my CSP account?

If you're no longer doing business with the customer who set you up on the CSP, ask the customer to make you inactive in the system.

What do I do if I am locked out of the CSP?

Using two-factor authentication protects you against fraud. For more information, see Enable or Disable Two-Factor Authentication.

If you don't have your six-digit backup validation code, contact your customer who will ask you to fill in a declaration form and provide either a copy of your photo ID or passport or your CSP login email to verify your identify.

Why don't I get the password reset emails?

Check your spam/junk email folder.

Emails sometimes get flagged as spam. If you still cannot find the email, write to supplier@coupa.com.

Why can't I log in to the CSP?

Make sure you have followed the instructions in Log in to the CSP. If you still have issues, reset your password. If the problem persists, write to supplier@coupa.com.

Why can't I log in after resetting my password?

Check if you are using the correct URL: https://supplier.coupahost.com.

Sometimes users bookmark the password reset URL (instead of the login URL) or bookmark a test site.

How can I log in if I forgot my two-factor authentication code, the code is not working, or I lost my device?

If you don't have them, contact your customer. For more information, see Log in with two-factor authentication.

If you cannot log in because of missing two-factor authentication codes, try to find and recover them first by using Google Authenticator or your device for text messages (SMS) to get new codes, or by using backup codes that you were told to copy or write down.

If you lost your codes, contact your customer or supplier@coupa.com. You need to provide proof of identification to ensure security of spend-related transactions for you and your customer.

For more information, see Log in to the CSP.

What do I do if I am not the admin/owner of my CSP account but I can't log in or don't have full access?

Contact your admin to activate your account or set your permissions.

Some users in the CSP have more power to activate and deactivate users, and decide which customers and types of information they can access (forexample, invoices but not orders or catalogs). Contact those admins to see why your access is not correct and have them fix it. If this is not possible, contact supplier@coupa.com.

Why do I get the "unauthorized or expired account" error?

Your customer has probably deactivated a setting on their end. Contact your customer to find out if this was intentional. ask them to check your supplier record or your supplier user in the system. If they can't solve the problem, they can contact Coupa support.

What do I do if I receive the "We're sorry, but something went wrong" error?

Contact your customer and ask them to open a support ticket because something is wrong on their end with a configuration or an update that they need to resolve with Coupa support.

Admin

How do I enable two-factor authentication?

After logging in to the CSP, go to **Account Settings** under your login name in the top right of the page to enable two-factor authentication. For more information, see Enable or Disable Two-Factor Authentication.

How can I disable two-factor authentication?

You can disable two-factor authentication from the **Account Settings** under your login name in the top right of the page.

> **Note:** If you disable two-factor authentication, you might not have access to your customers' information if they decided to request you to use this additional form of authentication.

How do I connect with my customer?

Contact your customer and send your login email.

You can create an account in the CSP either by using a link from a customer or a supplier that invited you, or you can register without an invitation. If you register with the link you received, you are automatically linked to your customer. If you register without the link, your customer needs to connect with you by changing the Primary Contact email on their supplier record and by inviting you, which automatically gets you linked. The customer can also find you in the Supplier Portal Directory and connect with you from there. To prevent soliciting and spamming, suppliers are not allowed to initiate connections through the CSP.

For more information, see Register for the CSP.

How do I know that I'm connected to my customer?

Once you're signed in to the CSP, scroll down. On the bottom right of the page, you can see your **Latest Customers**.

What do I do if I am connected to a customer in Coupa and a new customer also wants to connect?

If the customer uses Coupa Release 18, they can find you in their Coupa **Supplier Portal Directory** and add a connection to you.

Also, you can provide your new Coupa customer with the same email address that you use to connect to your other Coupa customer(s). When your new customer has that email address, they need to send you an email invite to join. Once you confirm the new connection request, you are connected to your new customer and your previous customers.

Where's the tab for my customer?

Once you're signed in to the CSP, if you don't have a tab for your customer, it's probably because you registered for the CSP using a different email address than the customer used for the invite. Ask your customer to send another invite using the address you registered with.

How do I add an employee?

On the main menu, click on the **Admin** tab. On the **Users** tab, click on the **Invite User** button. Provide the required information in the window that opens.

Why can't I access POs/invoices?

On the main menu, click on the **Admin** tab and check if you have access to the right roles and customers. If you have access but do not have the right roles or customers, add them. If you do not have access, ask your admin to give you access to the right roles or customers.

Why do I receive notifications if my notification preferences are turned off?

Log in to the CSP to check if the notifications are turned off. If they are turned off, contact your Coupa customer to open a ticket with Coupa support.

> **Note:** Some PO notifications from customers are not generated by the CSP, so you can't turn those off. Contact your customer if you don't want to receive those notifications.

Catalogs

How do I learn about hosting my catalog within Coupa?

You need to talk to your customer about how they would like to access your catalog.

How do I implement a cXML/punchout on my website?

You'll need a dedicated cXML developer or a third-party consultant, for example, Punchout2Go, to make your website cXML compliant. Once your site is cXML ready, provide your credentials to your customer. They'll handle the rest. For more information, see http://cxml.org.

Invoices

How do I create an invoice?

On the main menu, click on the **Orders** tab. If you are connected to more than one Coupa customer, select their name from the **Select Customer** dropdown menu. In the PO table that appears, choose the PO you want to invoice, and then click on the yellow coins to create an invoice. For more information, see Coupa Supplier Portal.

If you don't have a PO and your customer has given you permission to create invoices without a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Blank Invoice** button above the **Invoices** table.

If you don't have a PO and your customer has given you permission to create invoices with a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Invoice from Contract** button above the **Invoices** table.

For more information, see Create or Edit an Invoice.

How do I create an invoice that isn't backed by a purchase order?

To create a non-PO backed invoice, click on the **Invoices** tab on the main menu. If you are connected to more than one Coupa customer, select their name from the **Select Customer** dropdown menu. Click on the **Create Blank Invoice** button above the **Invoices** table. For more information, see Create or Edit an Invoice.

> **Note:** If you don't see the **Create Blank Invoice** button, contact your customer and ask them to configure your supplier account so that you can submit invoices without a backing PO.

How do I submit an invoice?

Your account needs to be configured to handle invoices through your customer's Coupa instance. Contact them to get set up with an invoicing method.

What options are available for me to submit invoices to my customers?

You should talk to your customer about which of the following methods they want to use:

- The CSP, where you sign in to manually flip a PO to create an invoice.
- Supplier Actionable Notifications (SAN), where you act on an email without logging in to the CSP.
- cXML, where you can automate the process of sending an invoice file using Coupa's standard cXML format.
- API, where you can automate the process of sending an invoice file using Coupa's API.
- Excel spreadsheet, emailed by your customer, which you fill out and send back to them.

Can I reuse an invoice number once my customer has deleted it on their end?

Yes, if a customer deleted an invoice number, you can reuse it.

Can I submit PDF invoices created from my system instead of using online invoicing?

Yes, you can. You can upload your PDF invoices in the following ways:

- Log in to the CSP to create an invoice and attach the PDF. You don't need to contact your customer to do this, and it only takes a moment.
- Email the PDF directly to your customer. This is ideal for invoices without a PO. However, your customer might have to manually enter the PDF invoice information into Coupa, which may cause a delay in payment. Check with your customer if this option works for them. They need to set up a specific email address where you can send the PDF.

Why can't I send cXML invoices?

Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

How do I know if an invoice has been registered?

On the main menu, click on the **Invoices** tab. For the desired customer, look for invoices that are still listed as drafts. They need to be edited and then submitted. If the invoice is not there, it's not in the system.

How do I add shipping charges to an invoice?

You can add shipping charges at the bottom of the invoice or at the line item level. Ask your customer which method they prefer.

Do I need to include accounting information on cXML invoices?

Invoices against a PO don't need accounting information, because that information is part of the requisition and is carried over to the PO. When an invoice references a PO line number, Coupa takes the accounting information associated with the line and adds it to the invoice.

How do I credit or cancel an invoice that's already been billed?

To create a credit, enter a negative quantity. For more information, see Create a credit note.

Once an invoice is submitted, it can't be changed in any way. For more information, see Create or Edit an Invoice.

How do I make a part claim on an invoice?

You can invoice multiple times against a single PO. Just click the gold coin icon and enter the amount you'd like to appear on the invoice.

Why can't I edit, void, or delete an invoice?

Once an invoice has been submitted, it can't be changed in any way. This ensures invoice processing integrity. However, you still have options:

1. Ask your customer to reject or void the existing invoice. You can then create a new one.

   > **Note:** If your customer is using compliant invoicing, they can only reject invoices but not void them.

2. Create a new credit memo that credits the customer for the original value, and then create a new invoice.

Ask your customer which method they prefer.

What does the status "Tolerance Hold" on an invoice mean?

It means your invoiced amount differs from the PO by more than your customer allows without manual approval. If an invoice has been on hold for awhile, ask your customer to review it.

What do I do if an invoice was rejected?

Just create a new invoice to replace the one that was rejected.

Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is your customer's queue and you'll be paid based on the payment terms you set with your customer.

What if I have an invoice that hasn't been paid?

For questions regarding payment information, contact your customer directly. Some payment details might be on the invoice document in Coupa, but not all customers update this information. Also, in your notification settings you can choose to receive payment notifications via email or short text message (SMS).

Do I need to see a purchase order on the CSP before I can invoice my customer?

It depends on how your customer has you set up. Contact them and ask how you're configured, and if you can send non-PO backed invoices.

What does the Export to button do?

You can export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (`.zip`) file.

By default, the maximum number of rows that you can export is 200,000. If you try to export a larger table, you receive an error message stating that only 200,000 rows are exported.

> **Note:** There is no limitation on the number of invoices or file size when exporting legal invoices.

> **Tip:** For the best performance, it is recommended not to export more than 1,000 invoices at a time.

When you export a table with less than 500 rows, the file downloads to your computer immediately. When a table has more than 500 rows, you receive the exported file zipped in an email.

How do I create a credit memo?

Log in to the CSP and click on the **Orders** tab on the main menu. Choose the PO you’d like to create a credit for and select the red coins. You'll create a negative invoice with either a negative quantity or a negative amount. For more information, see Coupa Supplier Portal.

If you don't have a PO and your customer has given you permission to create invoices without a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Blank Invoice** button above the **Invoices** table.

If you don't have a PO and your customer has given you permission to create invoices with a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Invoice from Contract** button above the **Invoices** table.

For more information, see Create or Edit an Invoice.

Why do I get the "VAT ID format incorrect" error?

You need to add GB or ABN in front of the VAT number for British or Australian suppliers/invoices. On the main menu, click on the **Admin** tab to add a legal entity with the correct VAT ID under **Legal Entity Setup**.

What do I do if I get the "Please fix the below error" message?

Something is wrong on the customer's end. Ask your customer to check their Coupa instance to see if there is any custom mandate field which can't be viewed on your side or if the billing account is active. Your customer can open a ticket with Coupa support if they can't solve the problem.

What types of files can I attach to an invoice?

For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

How long are legal invoices available for download?

Invoices in the CSP are available for you to download as long as you are connected to the corresponding customer through the CSP. You can also develop an internal process for downloading and storing these invoices in a separate electronic archive of your choice.

Orders

Can I set it so I can only see purchase orders that haven't been invoiced yet?
Currently, you are unable to filter purchase orders based on their invoiced status.

How do I see my customer's purchase orders?
On the main menu, click on the **Orders** tab. If you are connected to more than one Coupa customer, select their name from the **Select Customer** dropdown menu.

You can see their purchase orders only if you have access. Contact your customer and ask them to give you access.

How do I add a carriage to a purchase order?
You need to contact your customer directly for information about adding a carriage line.

How do I change a price on a purchase order?
You cannot change a price on a PO through the CSP. If you need a change order on a PO, talk to your customer about their policies.

How do I invoice a blanket purchase order?
You can invoice multiple times against a single PO. Just click the gold coin icon for the PO as you normally would, and enter the amount you'd like to appear on the invoice. The next time you want to invoice against the PO, just do the same thing.

How many times will Coupa try to resend a purchase order that wasn't able to be sent?
If a PO transmission results in a connection timeout because there was no response from the supplier, Coupa will try to resend the PO up to four times at five minute intervals.

What is the purpose of a PO acknowledgement by the supplier?
You can let your customers know that you've received the order. Some Coupa customers like their suppliers to use that field. Ask them if they want you to use it.

How can I view historical (closed) purchase orders in my customer's instance?
Your customer can provide you with information on closed purchase orders.

What is a soft closed PO?
A soft closed PO is a PO that your customer can reopen, for example, if an invoice or credit memo submission is needed, or if a PO is closed prematurely or by mistake.

You cannot invoice against a soft closed PO. For more information, see View and Manage POs.

Other

Where can I find information about integrating with Coupa?

For more information, see Suppliers.

How do I update my banking information for direct deposits?

Your banking information is stored in your customer's ERP system (for example, SAP or Oracle) and not stored in Coupa. Contact your customer directly with the updated information.

Where can I find payment information?

If your customer provided payment information, you can find it on the invoice.

If I use the CSP, who pays me?

Your customer, who uses Coupa, is still responsible for paying you directly. Coupa does not pay suppliers on behalf of buyers.

What does "pending receipt" mean?

This status shows that the customer is in the process of receiving the goods/services into their system. Once the customer enters the receipt, the invoice is matched against it.

What do I do if I have a sourcing issue?

See Sourcing Supplier FAQ. If you can't find the solution to your problem, contact sourcing.support@coupa.com.

Is the information in the CSP archived?

No, the information in the CSP is not archived, but you can access it as long as you have a CSP account.

1855 S. Grant Street, San Mateo, CA 94402
1-650-931-3200 www.coupa.com