Coupa Supplier Portal (CSP) Quick Reference Guide

Signing up for the Supplier Portal	
Questions	**Answers**
1. **Are there any costs that I will need to incur if I utilize Coupa?**	Coupa does not charge Samancor suppliers to use the portal.
2. **Where do I register for Coupa?**	You can request an invitation to join the Coupa Supplier Portal from your customer, who will then send you an invitation email, or you can visit **http://supplier.coupahost.com**
3. **Where do I log in to Coupa?**	**http://supplier.coupahost.com**
4. **How do I know if I am connected to my customer?**	Once you're signed into the Coupa portal, scroll down to the bottom right side of the page. From here, you will see your **"Latest Customers"**.

Coupa Supplier Portal Basics	
Questions	**Answers**
5. **How do I know if I am connected to my customer?**	Once you're signed into the Coupa portal, scroll down to the bottom right side of the page. From here, you will see your "Latest Customers".
6. **How do I see my customer's purchase orders?**	Click on the"**Menu**" icon, and select "**Orders**". If you are connected to more than one Coupa customer, select the relevant customer name from the dropdown menu.
7. **Where can I find payment information?**	If your customer has provided payment information, you will find it on the **invoice**.
8. **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 processes the receipt, the invoice will be matched against it.

9.	**If I use the COUPA SUPPLIER PORTAL, who pays me?**	Your customer, who uses Coupa, is still responsible for paying you directly. Coupa does not pay suppliers on behalf of the customer.

Purchase Orders	
Questions	**Answers**
10. **How do I create an invoice that is not backed by purchase order?**	You can only send non-PO-backed invoices if your customer has you set up for this. Contact them directly to query this, and request to be able to create invoices without a backing document.
11. **How do I change a price on a purchase order?**	You cannot change a price on a PO through the COUPA SUPPLIER PORTAL. If you need a change order on a PO, speak to your customer about their internal procurement policies.
12. **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 would like to appear on the invoice. The next time you want to invoice against the PO, just repeat these steps.
13. **How do I add "carriage" to a purchase order?**	You would need to contact your customer directly for information about adding a carriage line.
14. **Can I set it so I can only see purchase orders that have not been invoiced yet?**	Currently, you are unable to filter purchase orders based on their invoiced status.
15. **What is the purpose of PO acknowledgement by the supplier?**	You can let your customers know that you have received the order. Some Coupa customers like their suppliers to use that field. Ask your customer if they want you to use this functionality.
16. **How many times will Coupa try to resend a PO that was not 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.

Invoicing	
Questions	**Answers**
17. **How do I create an invoice?**	On the invoice tab, click on the dropdown and choose the desired customer. In the PO table that appears, choose the PO you would like to invoice, and then click on the yellow coins to create an invoice.
18. **How do I create an invoice if there's no purchase order?**	On the invoice tab, click on the dropdown and choose the desired customer. Click **"Create**" on the page that appears. Note: If you do not see the "**Create"** button, contact your customer and request for them to configure your supplier account so that you can submit invoices without a backing PO.
19. **How do I submit an invoice?**	Your account needs to be configured to handle invoices through your customer's Coupa instance. Contact them to set you up with an invoicing method.
20. **Can I submit PDF invoices created from my system instead of using online invoicing?**	Yes, you can. There are two ways you can upload your invoices in PDF: 1. Sign in to the COUPA SUPPLIER PORTAL to create an invoice and attach the PDF. You do not need to contact your customer to do this, and it is not a long process. 2. Email the PDF directly to your customer. This is ideal for invoices without a PO. The downside is that your customer will have to manually enter the PDF information into Coupa, which may cause a delay in payment. Check with your customer if this option works for them. The will need to set up a specific email address where you can send the PDF invoice to.
21. **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.
22. **How do I know if an invoice has been registered?**	For the relevant customer, look for invoices that are still listed as **"drafts"**. They would then need to be edited and submitted. If the invoice is not there, then it is not in the system.
23. **What does the status "Tolerance Hold" on an invoice mean?**	It means your invoiced amount differs from the PO by more than what your customer allows for, without manual approval. If an invoice has been on hold for a long period, contact your customer to review it.

24.	**Why can't I edit/ void/ delete an invoice?**	Once an invoice has been submitted, it cannot be changed in any way. However, you still have options: 1. Ask your customer to reject or void the existing invoice. You can then create a new one. 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 before actioning the above to avoid delaying the process.
25.	**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
26.	**How do I credit or cancel an invoice that has already been billed?**	Refer to "*How do I create a credit memo*". Once an invoice is submitted, it cannot be changed in any way. Refer to "*Why can't I edit/void/delete an invoice*" for more info.
27.	**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.
28.	**How do I create a credit memo?**	To create a credit memo, sign into the Coupa Supplier Network and go to the "**Orders**" page. Choose your customer, and at the bottom of the page, click the "**Credit Memo**" button to get started.
29.	**What does the Export button do?**	You can export the rows to an Excel document.
30.	**Do I need to include accounting information on cXML invoices?**	Invoices against a PO do not need accounting information, since that information will be found on 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.
Obtaining Payment		
Questions		**Answers**
31.	**Once an invoice has been approved, what do I need to do next?**	Nothing. The invoice is in your customer's queue and you will be paid based on the payment terms you set with your customer.

32.	**What do I do if an invoice was rejected?**	Just create a new invoice to replace the one that was rejected.
33.	**What if I have an invoice that has not been paid?**	For questions regarding payment information, contact your customer directly.

Catalogues	
Questions	**Answers**
34. **How do I learn about hosting my catalogue within Coupa?**	You would need to talk to your customer about how they would like to access your catalogue.
35. **Do I need to see a purchase order on the Coupa Supplier Network 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.
36. **How do I implement cXML/ PunchOut on my website?**	http://cxml.org

Managing your COUPA SUPPLIER PORTAL Account	
Questions	**Answers**
37. **How do I add an employee?**	From the **menu,** select "**Admin"**. Choose the "**User"** tab and click "**Invite User"**. Provide the required info in the window that opens.
38. **How do I update my banking information for direct deposits?**	Your banking information is stored in your customer's ERP system (i.e. SAP, Oracle, etc.), and not stored in Coupa. Contact your customer directly with the updated information.
39. **What options are available for me to submit invoices to my customers?**	1. The Coupa Supplier Portal, where you sign in to manually flip a PO to create an invoice. 2. cXML, where you can automate the process of sending an invoice file using Coupa's standard cXML format.
40. **How do I cancel my COUPA SUPPLIER PORTAL account?**	If you're no longer doing business with the customer who set you up on the COUPA SUPPLIER PORTAL, ask them to make you inactive in their system. http://onlinehelp.coupahost.com/COUPA SUPPLIER PORTAL-test/en/content/resources/training/supplier_training/story_html5.html

For additional support contact us on GPS.helpdesk@SamancorCr.com for assistance.