

# Quick Reference Guide

## What is Uniting's Coupa Supplier Portal?

Purchase orders are becoming mandatory across Uniting. In order to streamline our purchasing processes we now have a Uniting supplier portal via Coupa. This allows you to access all Uniting orders in one central location as well as being able to submit invoices for streamlined payments.

When Uniting staff want to purchase your goods/services they will raise a purchase order within Coupa and you will receive a notification to an email address of your choice. Action this purchase order as normal and when ready to invoice Uniting please follow the steps in Section 2 of this guide.

This guide will also assist you with logging in to the portal, viewing your orders and uploading your invoice for payment once you have fulfilled the order.

## What are the benefits of using Coupa?

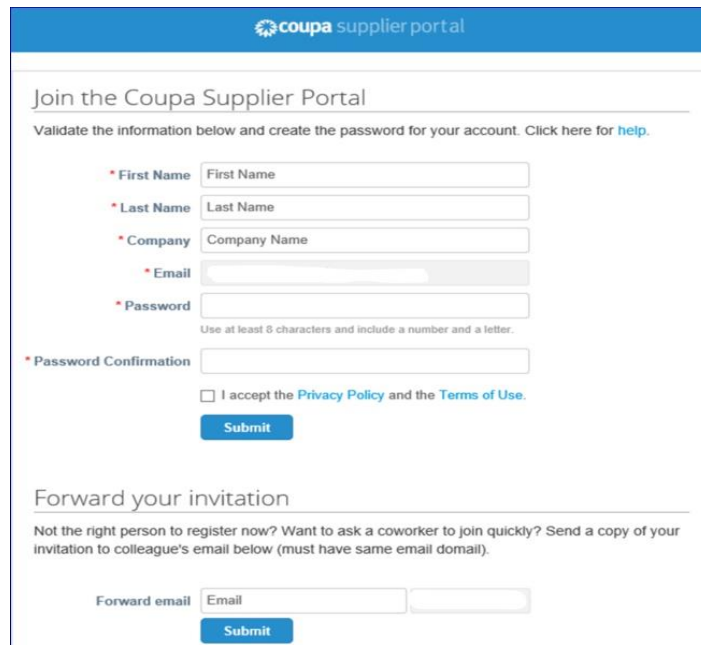
- A streamlined invoice payment process
- View the status of your payable invoices in real time
- No installation of hardware or software required
- As a Uniting supplier Coupa is free to use

## This Quick Reference Guide will outline;

1. Getting started with Uniting's Coupa supplier portal
2. How to view orders, submit invoices and credit notes
3. Invoice management
4. Account settings
5. Account setup via admin
6. Additional information

## 1. Registering with our Supplier Portal (Coupa)

You have now been invited to register to the Uniting's Coupa supplier portal. Click the link within the email and the "join the Coupa supplier portal" screen will appear



The screenshot shows the 'Join the Coupa Supplier Portal' registration form. At the top, there is a blue header with the 'coupa supplier portal' logo. Below the header, the title 'Join the Coupa Supplier Portal' is displayed, followed by a sub-header: 'Validate the information below and create the password for your account. Click here for help.' The form contains several input fields: 'First Name', 'Last Name', 'Company Name', 'Email', and 'Password'. The 'Password' field has a note: 'Use at least 8 characters and include a number and a letter.' Below the 'Password' field is a 'Password Confirmation' field. There is a checkbox for 'I accept the Privacy Policy and the Terms of Use.' and a blue 'Submit' button. Below the registration section, there is a section titled 'Forward your invitation' with the text: 'Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).' This section includes a 'Forward email' field and another blue 'Submit' button.

- Enter a password when prompted (min 8 characters required) and follow the prompts. You can now access all Uniting purchase orders in one central location.

## 2. How to submit your invoices, view orders and credit notes

Once logged in, click on the Orders menu to:

- View Uniting purchase orders (POs)
- Create an invoice against a PO
- Create a credit note against a PO

View your Uniting Purchase Orders:

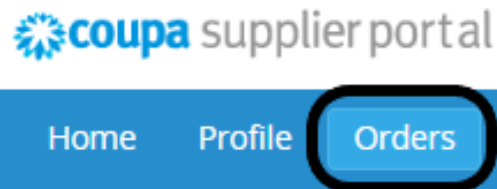
- Select PO number to view details
- You can add comments which will be visible to Uniting (Victoria and Tasmania)
- Acknowledge the PO(s) to let us know they are being actioned.
- View Order Lines allows you to report on all lines on the PO

## Submitting your Invoice via our supplier portal

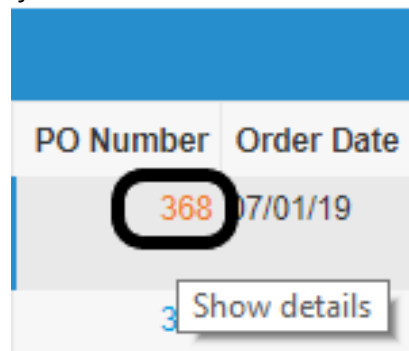
There are two options to create or 'flip' a PO into an invoice:

### 1. Via Uniting's Supplier Portal (Coupa)

- a. When you receive a purchase order notification and are ready to invoice Uniting simply login to Coupa and Click on the Orders Tab



- b. Click on the PO you've been sent:



- c. Click on the create invoice button at the bottom of the screen:



- d. Enter the invoice number, date and attach the invoice:

Create Invoice Create

General Info

* Invoice #	<input type="text"/>
* Invoice Date	<input type="text" value="07/03/19"/>
Payment Term	14
* Currency	AUD
Status	Draft
Image Scan	<input type="button" value="Choose File"/> No file chosen
Supplier Note	<input type="text"/>

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

- e. Ensure the line prices match your invoice (ex GST) – adjust if it does not match:

The screenshot shows a table with columns for Type, Description, and Price. The Description is 'Invoice file integration'. The Price field is circled and contains the value '200.00'.

\*Reminder please be aware only the GST or GST free tax codes will be accepted:

The screenshot shows a dropdown menu for tax selection. The 'Tax' label is circled. The dropdown is open, showing three options: 'AU: GST - GS' (selected), 'AU: GST - GST 10% - 10.0%', and 'AU: GSTFREE - GST Free - 0.0%'. The 'Total Tax' is shown as 0.00.

- f. Click on Calculate at the bottom of the screen and submit if the total matches your invoice:

The screenshot shows the 'Totals & Taxes' section. It includes fields for Shipping, Tax, Tax Reference, Handling, Tax, Tax Reference, Misc, Tax, Tax Reference, and a final Total Tax of 20.00. The Net Total is 200.00, and the overall Total is 220.00.

The screenshot shows the bottom navigation buttons: Delete, Cancel, Save as Draft, Calculate, and Submit. The Calculate and Submit buttons are circled.

No further action is required, you have now submitted your invoice directly to Uniting's Accounts Payable team for streamlined payment.

## 2. Directly via your email inbox

- Submit your invoice direct from the PO email upon receipt of the PO in your inbox following the instructions below to fill in the \*mandatory information:
  - a. \*Invoice # – generated from your own billing system
  - b. \*Invoice date – generated from your own billing system
  - c. \*Currency – nominate the applicable currency
  - d. \*Image scan – upload a copy of the invoice (JPG, PNG, TIFF, PDF or GIF)
  - e. Supplier note – add additional note if applicable
  - f. \*Validate invoice, remit-to and ship-from details are correct
  - g. Add additional details to the invoice lines if required (add line, comments, line level taxation, deleting a line item or deleting the invoice)
  - h. Calculate
  - i. Save as a draft
  - j. Submit

Ensure that the invoice details you have entered match the invoice generated from your own billing system

## Create a credit note against a PO

There are two options to create a credit note:

### 1. Via the orders menu using the (red coin icon)

- Click the red coin icon against the PO # and follow the instructions below to fill in the \*mandatory information:
  - a. \*Credit note # – generated from your own billing system
  - b. Credit note date – generated from your own billing system
  - c. \*Original invoice # – enter the original invoice number
  - d. \*Original invoice date – enter the original invoice date
  - e. \*Image scan – attach a copy of the credit note
  - f. Adjust PO lines as required to reflect credit note details

### 2. Via the invoice's menu using the button

- Click the credit note button to either;
  - a. Resolve a disputed invoice or
  - b. Record a miscellaneous credit e.g. return of goods

**Credit Note** ✕

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

Reason  Resolve issue for invoice number  ▼

Other (e.g. rebate)

**Credit Note** ✕

How do you want to correct invoice "#1234" ?

Completely cancel the invoice with a credit note i

Adjust invoice with a credit note i

### 3. Invoice management

The invoices menu allows you to:

- View invoice details and run reports
- View purchase orders and
- Create credit notes

coupa supplier portal

NOTIFICATIONS 83 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Add-ons Admin

Select Customer: Uniting (Victoria and Tasmania) Ltd

Invoices

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
5F	04/15/19	Approved	114	2,200.00 AUD	No	
5F	04/15/19	Voided	114	2,200.00 AUD	No	
5F	04/15/19	Voided	114	2,750.00 AUD	Yes	
17	04/15/19	Pending Approval	113	220.00 AUD	No	

#### Invoice Status:

- Approved – approved for payment by Uniting (Victoria and Tasmania) Ltd
- Draft – the invoice has been created but not yet submitted and can be edited
- Pending approval – awaiting approval for payment by Uniting (Victoria and Tasmania) Ltd
- Processing – invoice submitted and received by Uniting (Victoria and Tasmania) Ltd
- Disputed – invoice has been disputed by Uniting (Victoria and Tasmania) Ltd
- Voided – invoice not valid (status of invoice once resolution of a disputed invoice)

### 4. Account Settings

The Account Settings menu (located under name) allows you to:

- Manage your password
- Log out of Uniting's Coupa supplier portal

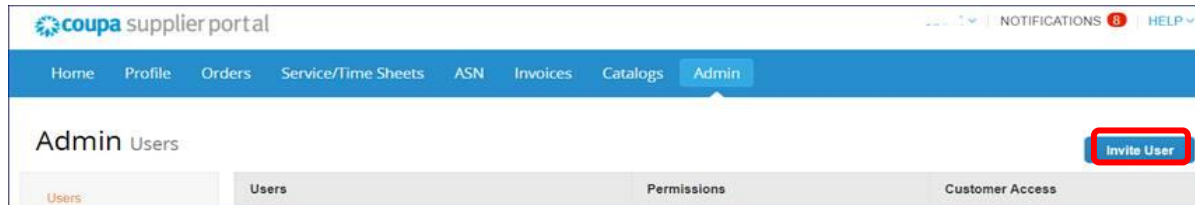
The Profile option allows you to:

- Add or update details about your company (different to admin menu)

## 5. Account setup via Admin

### The Admin menu allows you to:

- Invite your colleagues to use the portal via user (admin > users > invite users)



- E-Invoicing setup to enter your remit details and manage legal entity

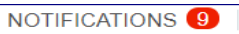
**Important:** Before you submit an invoice for processing you will need to enter some remittance details. This is a one-time requirement only, unless your details change in the future. To enter:

1. Go to the admin menu options
2. Select e-invoicing set up
3. Click add legal entity
4. Enter the legal entity name and the country, click on continue
5. Enter the address details for sending remittance. Keep both check boxes ticked.
6. Enter your ABN
7. Banking information (not required to be entered in the supplier portal)


**Note:** If your banking details change, please email [accounts.payable@vt.uniting.org](mailto:accounts.payable@vt.uniting.org) to update

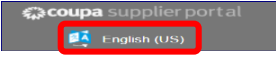
8. Save and continue
9. Click on next, or choose to add additional remit-to details
10. Click on done, or choose to add additional shipping details
11. Setup complete, press return to admin

## 6. Additional Information

- Notification preferences 
- To view details of your notifications and to manage them (turn them on/off), click on the notifications link to select your user preference (online, email or SMS)

Orders			
A new comment is received	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A new order is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

- Viewing details where multiple customer records are attached to a single login
- On the home page under  click and select the customer record that you wish to view. *If only one customer record is available, this selection option will not be available.*

- The default date format is set to MM/DD/YY. To update, hover over English US at the bottom of the home screen  and select English (Australia)
- Getting Help – Once you have successfully logged in, you can Take a Tour which is an online demonstration on how to use the portal

## To login to Uniting's Supplier Portal (Coupa)

<https://supplier.coupa.com>

If you require further information on Uniting's supplier portal, please visit our website:

<https://www.vt.uniting.org/suppliers/> or contact [accounts.payable@vt.uniting.org](mailto:accounts.payable@vt.uniting.org).

