

Coupa Supplier Portal (CSP)

Quick Reference Guide

What is the Coupa Purchase-to-Pay system?

Coupa is a leading cloud-based Purchase-to-Pay software system connecting buyers with their suppliers.

When Uniting staff wish to purchase goods or services they will create a Purchase Order in the Coupa Purchase-to-Pay system. This Purchase Order will be emailed to you and made available in the Coupa Supplier Portal.

This guide will assist you in 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?

Supplier benefits of using Coupa include:

- Real time visibility into the status of your invoices and payments
- A faster invoice-to-pay process
- No installation of hardware or software required

This Quick Reference Guide will outline;

1. Getting Started with the Coupa Supplier Portal (CSP)
2. How to view Orders, create invoices and credit notes
3. Invoice Management
4. Account Settings
5. Account setup via Admin
6. Additional Information

1. Getting Started with the Coupa Supplier Portal (CSP)

- An invite will be emailed to you separately from Uniting (Victoria and Tasmania) Ltd to invite you to register to the Coupa Supplier Portal (CSP)
- Once received, click the link within the email and the “Join the Coupa Supplier Portal” screen will appear

The screenshot shows the registration page for the Coupa Supplier Portal. It includes a header with the Coupa logo and the text 'coupa supplier portal'. The main heading is 'Join the Coupa Supplier Portal'. Below this, there is a sub-heading 'Validate the information below and create the password for your account. Click here for help.' followed by several input fields: 'First Name', 'Last Name', 'Company', 'Email', and 'Password'. A note indicates that the password must be at least 8 characters and include a number and a letter. There is also a 'Password Confirmation' field and a checkbox for accepting the Privacy Policy and Terms of Use. A 'Submit' button is located below the form. Below the registration form, there is a section titled 'Forward your invitation' with a sub-heading '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 'Submit' button.

- Enter a password when prompted (min 8 characters required) and follow the prompts
- Notification Preferences NOTIFICATIONS 9
 - To view details of your notifications and to manage them (turn them on or off), click on the Notifications link to select your user preference either 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 Latest Customers 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 English (US) 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

2. How to view Orders, create invoices and credit notes

The Orders menu allows you to:

- View Purchase Orders (PO) that have been issued by Uniting
- Create an Invoice against a PO
- Create a Credit Note against a PO

View Purchase Orders that have been issued by Uniting:

- Select PO Number to view the details
- You can add comments which will be visible to Uniting (Victoria and Tasmania)
- Acknowledge PO. This lets Uniting (Victoria and Tasmania) know you have viewed and acknowledged the PO
- View Order Lines allows you to report on all lines on the PO

Create an Invoice against a PO

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

1. Via Coupa Supplier Portal (CSP)

- Under actions in the PO menu click on Create Invoice 🪙 (gold coin icon)
- Click on the PO link to open the PO and then click on the create invoice button

2. Via PO Email

- Submit your invoice direct from the PO email on 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 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 Invoices 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

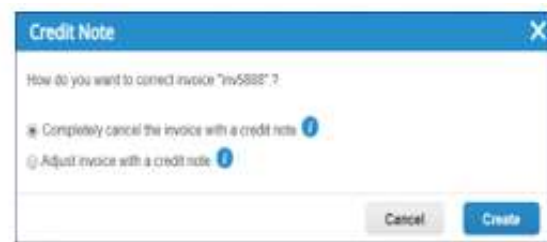


Credit Note

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 "inv5888" ?

Completely cancel the invoice with a credit note

Adjust invoice with a credit note

3. Invoice Management

The Invoices menu allows you to:

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogs, Add-ons, and Admin. To the right of the navigation bar, there are links for NOTIFICATIONS (with a red badge showing '33') and HELP. Below the navigation bar, there is a 'Select Customer' dropdown menu currently set to 'Uniting (Victoria and Tasmania) Ltd'. The main content area is titled 'Invoices' and features a table with the following data:

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 the Coupa Supplier Portal (CSP)

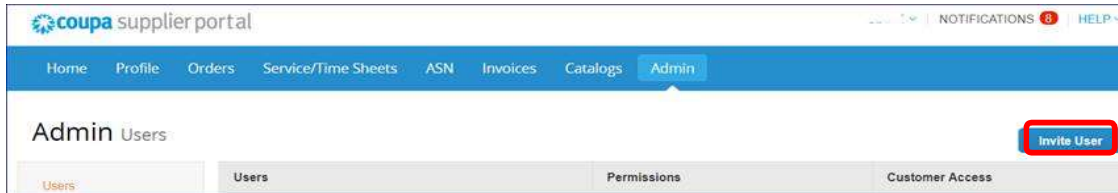
The Profile option allows you to:

- Add or update details about your company – different to Admin menu

5. Account setup via Admin

The Admin menu allows you to:

- Invoice 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 CSP)

Note: If your banking details changed, please email accounts.payable@vt.uniting.org to update

8. Save & 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

Login to the Coupa Supplier Portal

<https://supplier.coupahost.com>

If you require further information on the Coupa Supplier Portal, please access https://success.coupa.com/Suppliers/For_Suppliers

or please contact accounts.payable@vt.uniting.org

