

Coupa Supplier Portal Admin and User Guide

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Get Started with the CSP

This chapter contains the following topics:

Changes in the CSP Documentation

See what has changed in the CSP documentation since the previous release.

Register for the CSP

You can 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, you can 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, or ASNs 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.

Changes in the CSP Documentation

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.
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 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 <i>Why can't I edit, void, or delete an invoice?</i> frequently asked question. Updated the <i>What does the Export to button do?</i> 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.
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.

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.

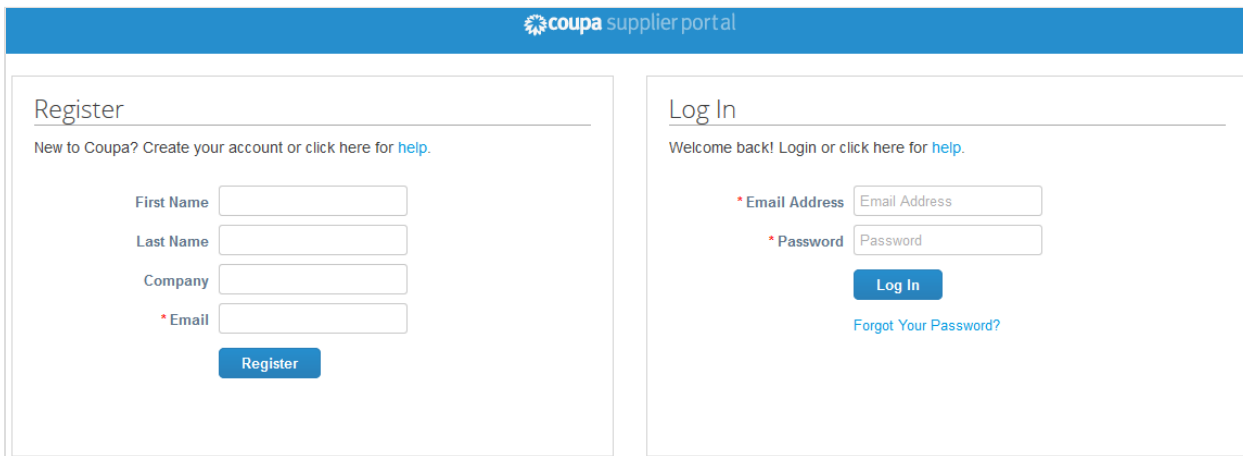
Your CSP account is based on a specific email address. If you use an email address different from the one your Coupa customers have on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

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.




The screenshot shows the Coupa supplier portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main panels. The left panel is titled "Register" and contains the text "New to Coupa? Create your account or click here for [help](#)." Below this text are four input fields: "First Name", "Last Name", "Company", and "Email". The "Email" field is marked with a red asterisk. A blue "Register" button is located below the "Email" field. The right panel is titled "Log In" and contains the text "Welcome back! Login or click here for [help](#)." Below this text are two input fields: "Email Address" and "Password". The "Email Address" and "Password" fields are marked with a red asterisk. A blue "Log In" button is located below the "Password" field. Below the "Log In" button is a link that says "Forgot Your Password?".


In both cases, you receive an email with the subject line **Action Required from <customer name>: Click Below to Join Coupa** or **Action Required for <supplier name>: Click Below to Join Coupa**, 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.

The email contains instructions and links to useful information, and buttons for joining the CSP or forwarding the invitation.



Action Required from Coupa - Click Below to Join Coupa

Powered by 

Hello Orange Supplier,

Acme Inc. wants to connect with you on Coupa. Once registered you can do things with Coupa (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Coupa's Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!

Jane Doe
Acme Inc

Join Coupa

Forward This

[Overview](#)


Learn more about the Coupa Supplier Portal

[Need Help?](#)

Answers to common questions and issues

[Coupa Info](#)

Learn more about the how company's use Coupa



Business Spend Management

Note: If you don't receive your invitation email, check your spam folder.

PO email


If you transact with your customers through PO methods other than the CSP and you are not linked to the CSP, you can see the **Create Account** button in your PO notification email.

Coupa Liquid Purchase Order #100000150

Create Invoice

Acknowledge PO

Add Comment

Create Account 

Note: If you are already linked to the CSP, you can see the **Login** button instead of **Create Account**.

Clicking on the **Create Account** button directs you to [create an account](#) to the CSP.

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 the invitation email, fill in the mandatory fields to provide basic information for your [account](#) and your company's [public profile](#).



Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* Email

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Forward your invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain).

Forward email

Setting	Description
*First Name	Your personal first name to be applied to your personal account.
*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 .
*Email	This field can't 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

Setting	Description
	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.

To create a CSP account, you must also accept the Privacy Policy and the [Terms of Use](#).

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**. 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**.

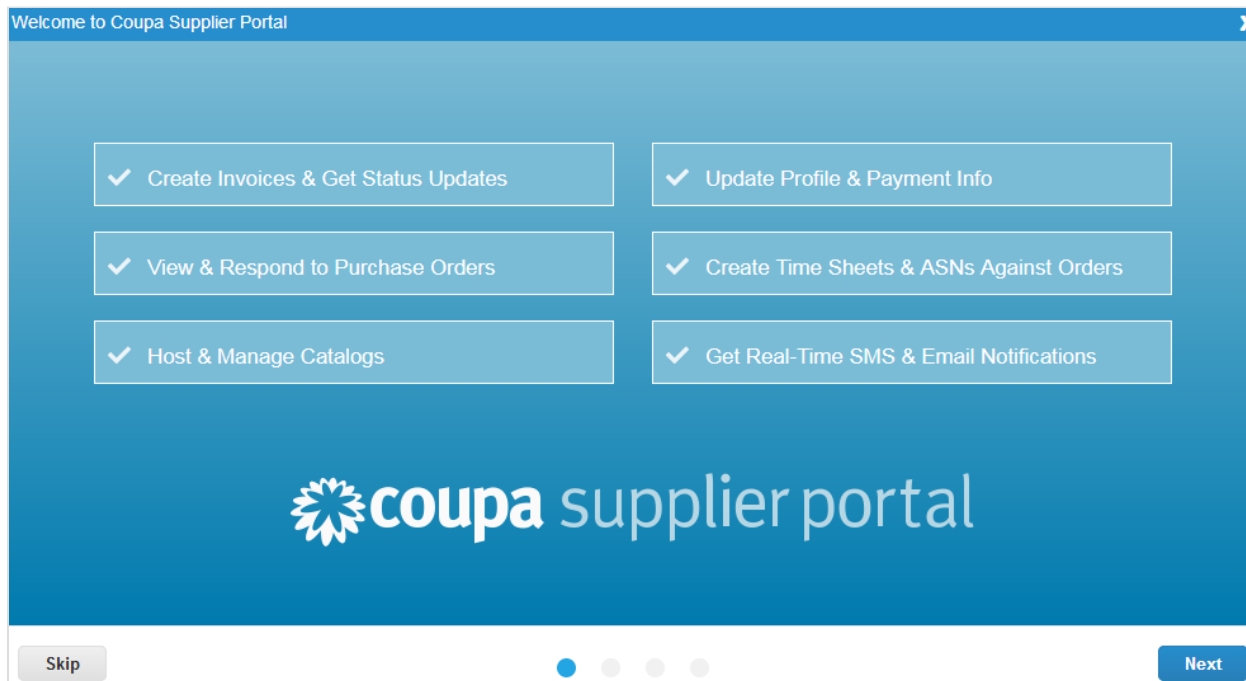
The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "supplier portal". Below the header, there are two main panels. The left panel is titled "Register" and contains the text "New to Coupa? Create your account or click here for [help](#)." followed by four input fields: "First Name", "Last Name", "Company", and "Email". Below these fields is a blue "Register" button. The right panel is titled "Log In" and contains the text "Welcome back! Login or click here for [help](#)." followed by two input fields: "Email Address" and "Password". Below these fields is a blue "Log In" button and a link for "Forgot Your Password?".

Warning: After logging in to the CSP as a non-admin user, you can see a banner listing your existing permissions and the permissions you can request from your admins. CSP admins that manage users are also notified through a banner to check their users' permissions.

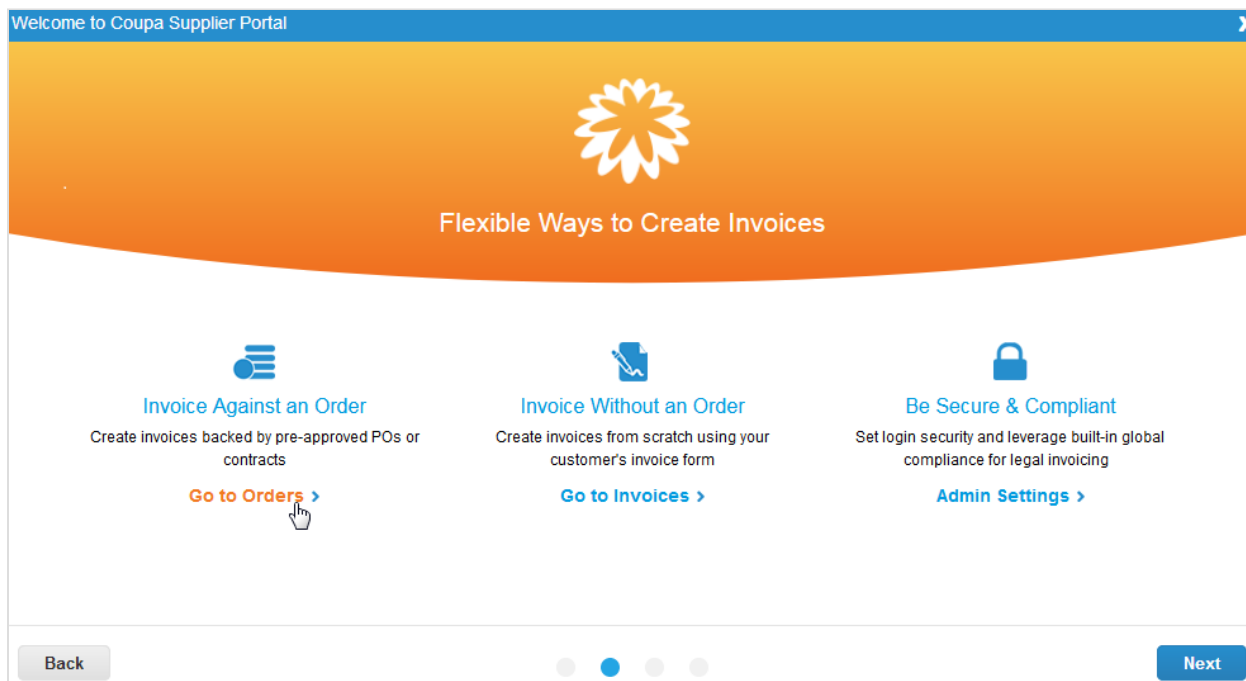
Note: You can close the banner for the current session, but the message is displayed again after logging in to a new session.

Welcome tour

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



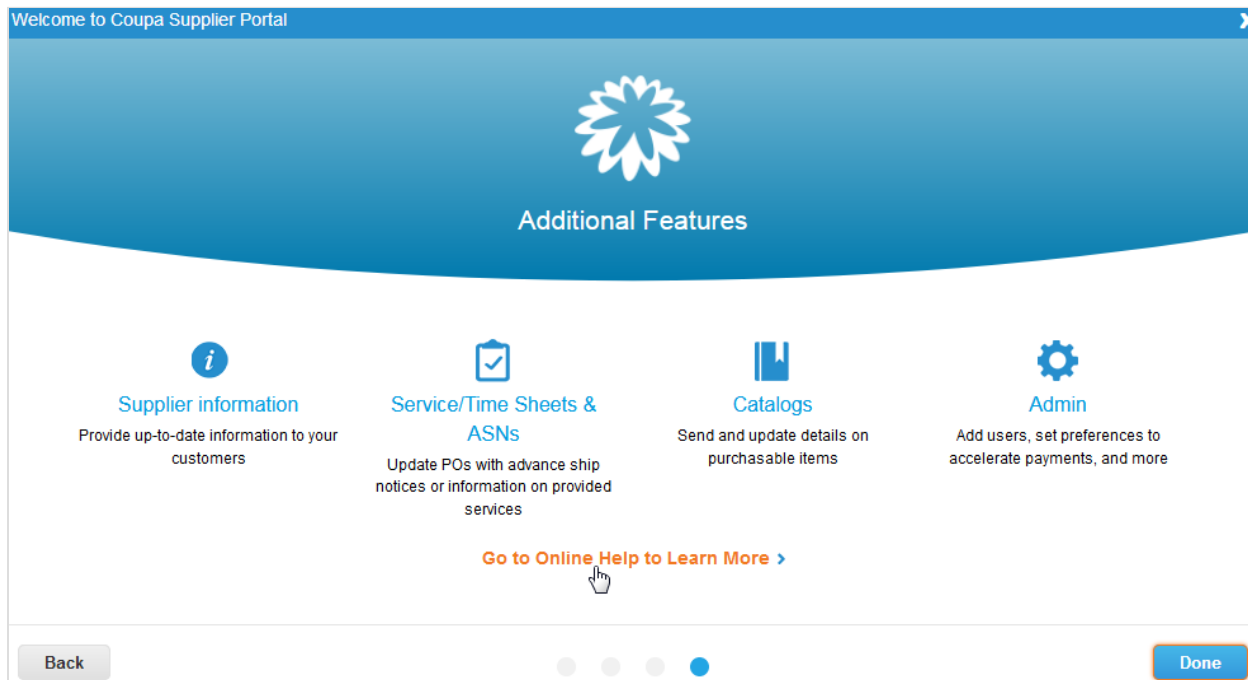
You can skip the tour by clicking on the **Skip** button or closing the window with the **X** in the top right corner. Clicking **Next** takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



By clicking on the relevant link, you can go directly to view the **Orders**, **Invoices**, or **Admin Settings** pages, or go to the next tour page that provides basic information about how the CSP can help you transact and communicate with your

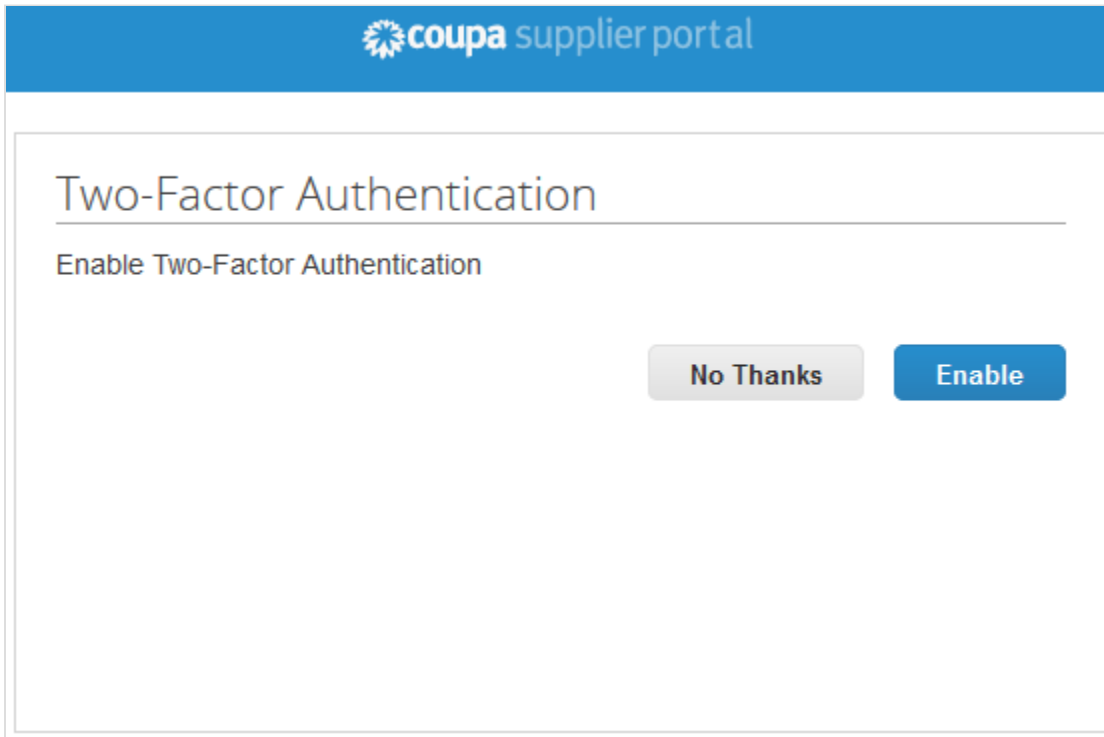
customers, for example, by allowing you to manage your catalogs, orders, and invoices, and setting notification preferences for important customer transactions.

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 the admin, such as, adding users or setting early payment discount terms to accelerate orders and invoices. 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](#).



The screenshot shows the 'coupa supplier portal' header. Below it, the title 'Two-Factor Authentication' is displayed. Underneath the title, the text 'Enable Two-Factor Authentication' is shown. At the bottom of the form, there are two buttons: 'No Thanks' (grey) and 'Enable' (blue).

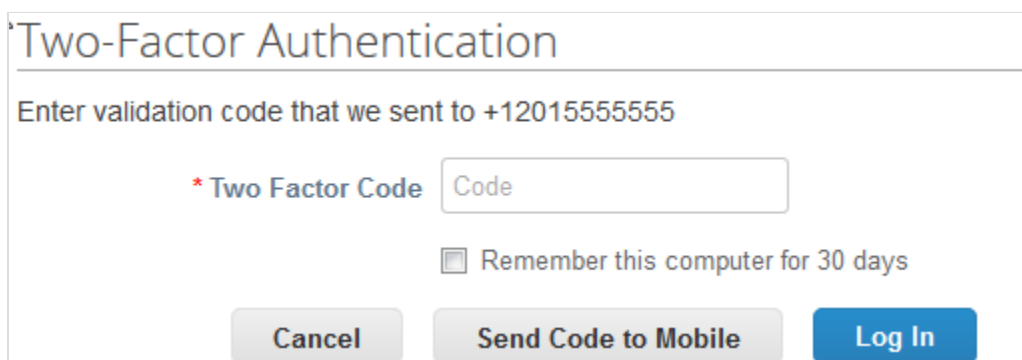
Note: Some customers may require you to use two-factor authentication when accessing their information.

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.



The screenshot shows the 'Two-Factor Authentication' window. It prompts the user to 'Enter validation code that we sent to +1201555555'. There is a text input field labeled '* Two Factor Code' with the placeholder text 'Code'. Below the input field is a checkbox labeled 'Remember this computer for 30 days'. At the bottom, there are three buttons: 'Cancel' (grey), 'Send Code to Mobile' (grey), and 'Log In' (blue).

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

Note: The code is good only for 60 seconds. If you don't 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 don't 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 and order lines, service/time sheets, advance ship notices (ASN), invoices, and catalogs.

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 customers 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.

Select Customer Coupa

Create New data table view

General

Name

Visibility Only Me
 Everyone

Start with view All

Conditions

Apply All of these conditions:

Invoice # is +

Columns

Available columns	Selected columns
Commented	Invoice #
Comments	Created Date
custom_field_10	Status
custom_field_9	PO #
Date Of Supply	Total
Delivery Number	Unanswered Comments
Disputed Date	Actions
Document Type	
Invoice Date	
Lookup Custom Field	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	

Default Sort Order

Sort by in ascending order.

Cancel Save

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	Details
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.

Create or Update Your Profiles

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

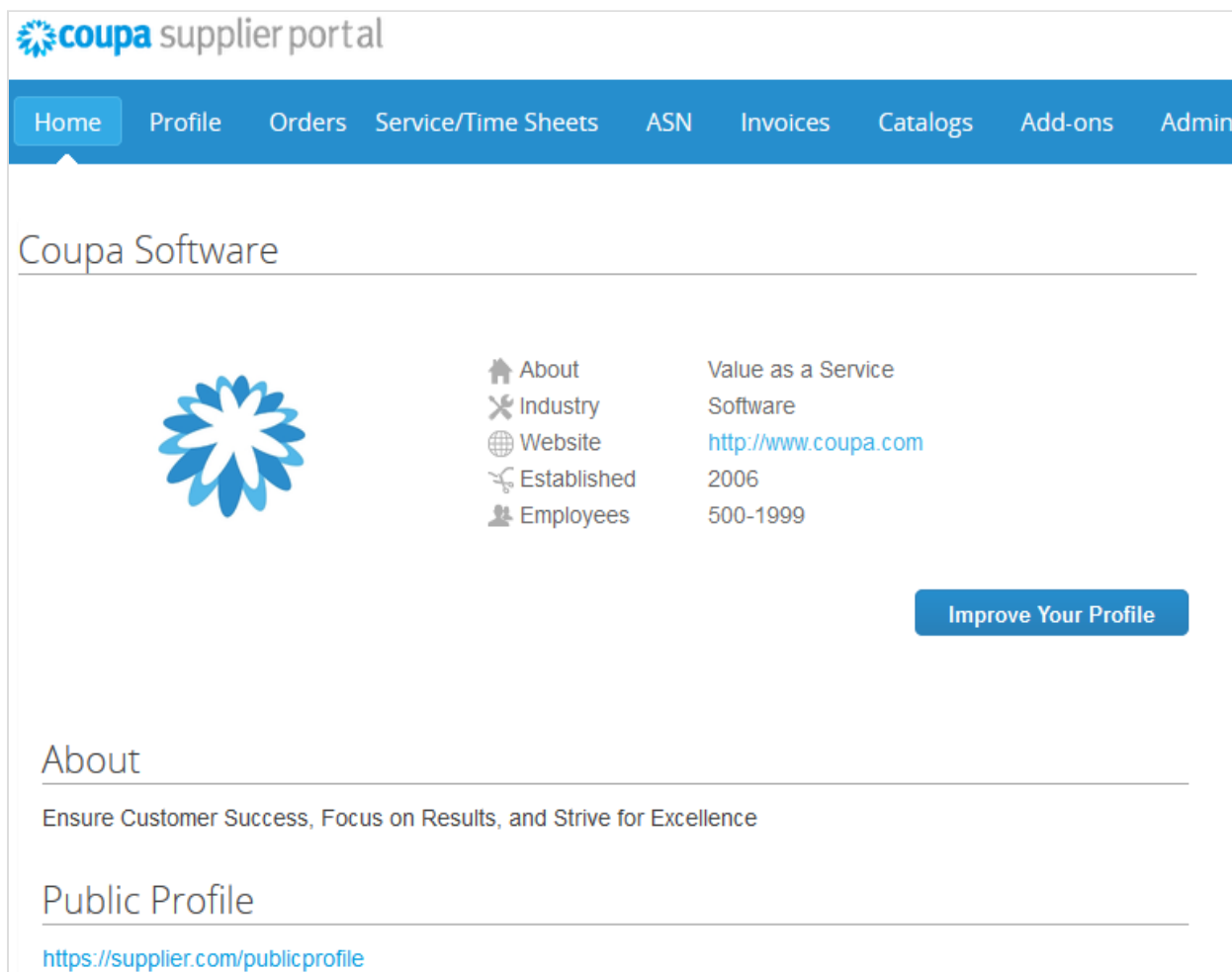
You can view and update your public and customer-specific profiles from the **Home** page or the **Profile** page.

Note: Some sections are labeled as private and can't 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

Your public profile is created when you create your account and it contains general information about your company, for example, your name, logo, a description, and contact information.

Anyone can find and connect with you through your public profile.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area displays the public profile for 'Coupa Software'. On the left is the Coupa logo. To the right, there is a table of company information:

Home	About	Value as a Service
Wrench	Industry	Software
Globe	Website	http://www.coupa.com
Calendar	Established	2006
Group of people	Employees	500-1999

Below the table is a blue button labeled 'Improve Your Profile'. Underneath, there is a section titled 'About' with the text: 'Ensure Customer Success, Focus on Results, and Strive for Excellence'. At the bottom, there is a section titled 'Public Profile' with the URL: <https://supplier.com/publicprofile>.

On the **Home** page, click **Improve Your Profile > Edit Profile** to make changes.

On the **Profile** page, select **Public Profile** from the drop-down list and edit the background and the profile.

Create or update your customer-specific profile

To update your customer-specific profile, you have the following options:

- Click on a customer's name under the **Latest Customers** section on the **Home** page and click **Edit**.
- Select the customer's name from the **Profile** drop-down on the **Profile** page and click **Edit**.

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.

Profile Coupa Inspire

Changes may update your profile information with your customers.

Cancel Save changes

Address

* Address Line 1

* City

* State

* Postal Code

* Country United States

Contact

* First Name

* Last Name

* Email

Work Phone 🇺🇸 +1 201-555-5555

Mobile Phone 🇺🇸 +1 201-555-5555

Fax Number 🇺🇸 +1 201-555-5555

Financial 🔒 private section

Tax ID #

DUNS #

Remit-To Addresses 🔒 private section

Valid until May 31, 2019 To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

To create a new customer-specific profile, copy an existing profile by clicking **Edit** and selecting a profile from the **Copy from** drop-down list in the top right corner of the page, and make the necessary changes by clicking on the blue arrow buttons.

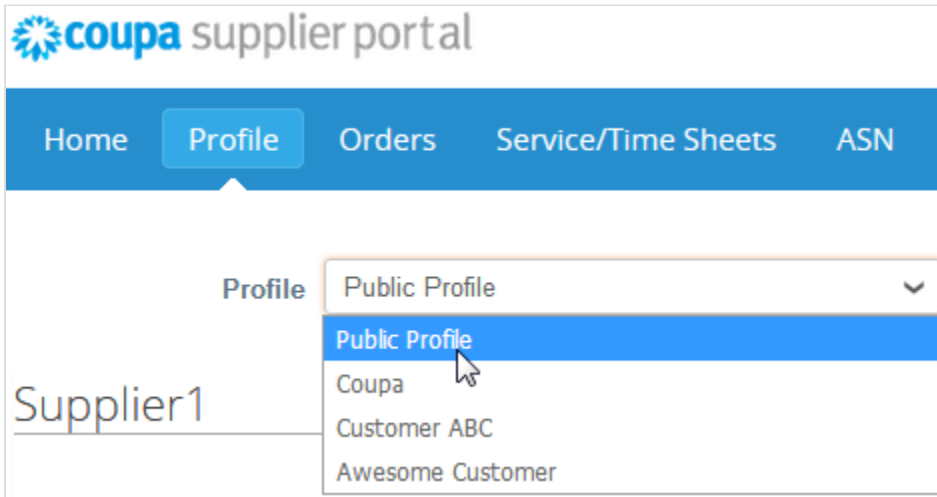
The screenshot displays two side-by-side panels for profile management. The left panel, titled 'Coupa Inspire', contains the following sections:

- Address:** Fields for Address Line 1, City, State, Postal Code, and Country (set to United States).
- Contact:** Fields for First Name (First), Last Name (Last), Email (first.last@supplier.com), Work Phone, Mobile Phone, and Fax Number.
- Financial (private section):** Fields for Tax ID # and DUNS #.
- Remit-To Addresses (private section):** A link to manage addresses, with a note: "To manage remit to addresses, please visit the E-Invoicing Setup section".

The right panel, titled 'Copy from', shows a dropdown menu with 'Coupa' selected. Below it is a list of fields to be copied, each with a blue arrow button:

- Street
- City
- State
- Postal Code
- Country
- First Name (value: firstname)
- Last Name (value: lastname)
- Email (value: firstname.lastname@supplier.com)
- Work Phone
- Mobile Phone
- Fax Number
- Tax ID #
- DUNS #

To manage a specific profile, select the customer name from the **Profile** drop-down list. If you don't see the customer you're looking for, it means that you aren't connected to them yet. You can't see them in the **Select Customer** drop-down list on the **Purchase Orders**, **Advance Ship Notices**, **Invoices**, and **Catalogs** pages either.



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.

The screenshot shows the 'My Account' page in the Coupa Supplier Portal. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. A dropdown menu is open over the 'Admin' link, showing 'Account Settings', 'Notification Preferences', 'Account Settings', and 'Log Out'. The main content area is titled 'My Account Security & Two-Factor Authentication'. On the left, a sidebar menu has 'Security & Two-Factor Authentication' selected. The main content is divided into two sections: 'Mobile Phone Verification' and 'Two-Factor Authentication'. In the 'Mobile Phone Verification' section, the status is 'Mobile Phone : Not verified' and the phone number is '+1 201-555-5555'. A 'Validate' button is present. In the 'Two-Factor Authentication' section, the status is 'SMS : Disabled' and 'Two Factor Authenticator App : Disabled'. There are 'Enable' buttons for both options.

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.

Enter the code that you received by SMS ✕

Your verification code has been sent to: +1 201-555-5555

* Code


Cancel Resend Code OK

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

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


Two-Factor Authentication ✕

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.





1. Download Google Authenticator mobile app

Download on the App Store
GET IT ON Google play



2. Scan this QA code using Google Authenticator app





3. Enter the 6-digit validation code - open your mobile device's 'Google Authenticator' app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code

Remember this computer for 30 days

No Thanks. Continue without additional security
Enable

Choose **Remember this computer for 30 day** if you're 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**.

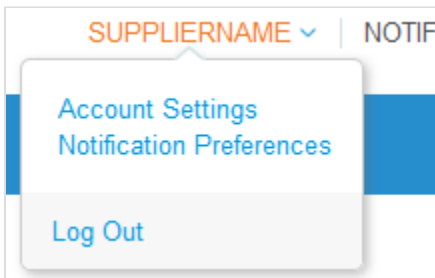
If you enable or disable two-factor authentication, you get an email notification of the change.

Manage Your Account

On the **My Account** page you can make changes to your personal information (name, photo, 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 Password** page, fill in the fields you want to change, and then click **Save**. The asterisk (*) indicates mandatory fields.

My Account Password

Settings

Notification Preferences

Security & Two-Factor Authentication

*** First Name**

*** Last Name**

*** Email**

*** Current Password**

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

Save

Setting	Description
*First name	This is you personal first name.
*Last name	This is your personal last name.

Setting	Description
*Email	This field can't 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 .
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.
Upload your photo	You can add a personal photo in .jpg, .png, or .gif format.

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

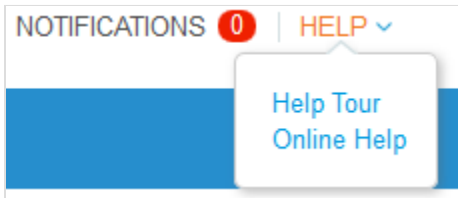
Click on the **Security & Two-Factor Authentication** link to enable/disable two-factor authentication. For more information, see [Enable or Disable Two-Factor Authentication](#).

Navigate and Get Help

Help

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

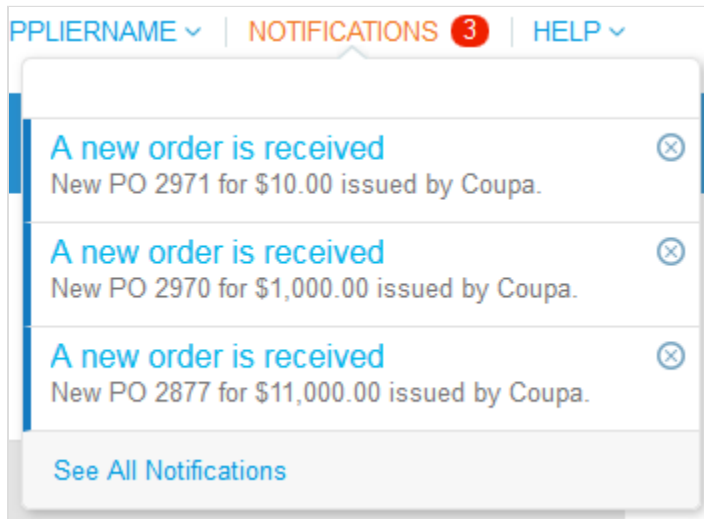
To access a CSP function, click on the relevant tab on the main menu at the top of the CSP main page.

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.

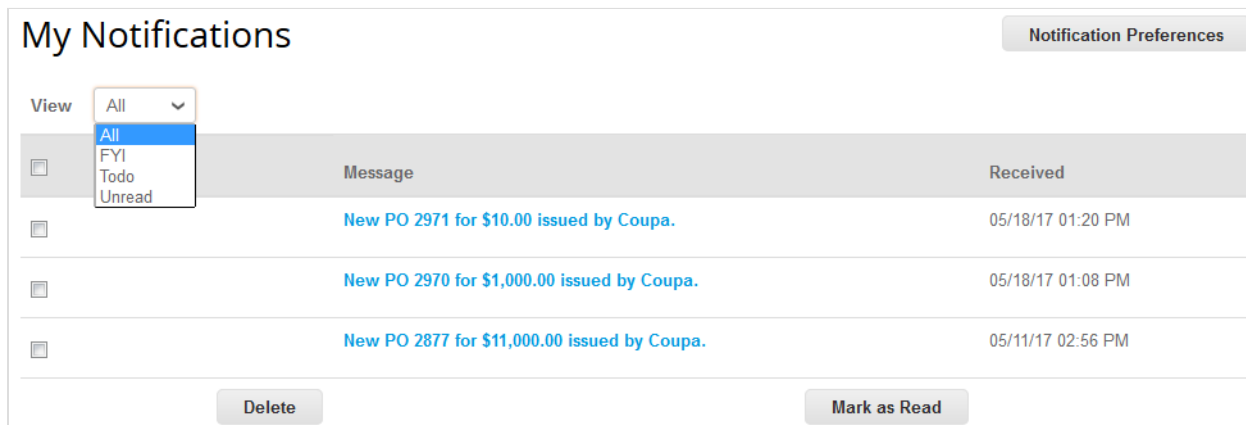
Menu Item	Description
Service/Time Sheets	View the list of service/time sheets and related purchase order lines.
ASN	Send advance ship notice, that is, notifications about when you ship items to your customers.
Invoices	Create and manage invoices to send to your customers.
Catalogs	Create and manage customer-specific catalogs.
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.

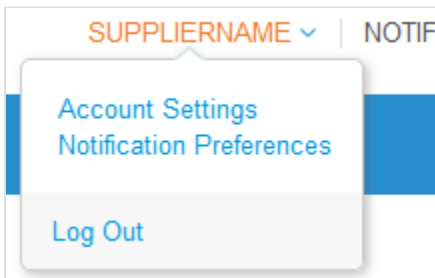


To view details of your notifications and to manage them, click on the **Notifications** link.



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

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. Your SMS notification selections are deleted if you disable mobile phone verification.

Setting	Description
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
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. Disabled by default.

Setting	Description
A form response needs your attention	Enabled by default: Online and Email
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
Orders	
A new comment is received	Enabled by default: Online and Email
A new order is received	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
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	
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:

Configure Punchouts

You can 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 Purchase Orders page by configuring the PO delivery method.

Create an Invoice from a PO

Create invoices from the Purchase Orders page by flipping a PO.

Create a Credit Note

Issue credit notes to correct invoices, cancel duplicate invoices, and more.

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.

Create or Update an ASN

Notify your customer in advance of a shipment.

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 POs

View purchase orders received from your customers.

View and Manage Service/Time Sheets

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

View PO Lines

You can view individual PO lines by going to Orders > Order Lines.

View Service/Time Sheet Lines

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

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 <code>DUNS</code> or <code>NetworkID</code> .
Buyer Domain	Part of the From section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it is usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
Supplier Identity	Your <code>DUNS</code> or <code>NetworkID</code> .
Supplier Domain	Part of the To section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it is usually <code>DUNS</code> or <code>NetworkID</code> , 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 <code>none</code> .
Protocol	This field should always be <code>cxml</code> .

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 **Purchase Orders** or **Purchase 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	<p>Choose how to receive POs from your customer:</p> <ul style="list-style-type: none"> • 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. <p>Note: If you want to use a method not listed here, talk to you customer about alternatives.</p>
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 <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Identity	Your customer's <code>DUNS</code> or <code>NetworkID</code> .
cXML Supplier Domain	Part of the To section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Supplier Identity	Your <code>DUNS</code> or <code>NetworkID</code> .
cXML Secret	A password that you and the customer agreed upon. If no shared password is specified, Coupa automatically passes <code>none</code> .
cXML Protocol	This field should always be <code>cxml</code> .

Create an Invoice from a PO

To flip a PO into an invoice, do one of the following:

- Click on the **Create Invoice** () icon for the PO in the **Purchase Orders** table.
- Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button.

Purchase Order #3050

Status Issued - Sent via Email

Order Date 05/31/17

Revision Date 05/31/17

Requester FirstName LastName

Email FirstNameLastName@coupa.com

Payment Term Net 30 [Accelerate Payment](#)

Attachments None

Acknowledged

Shipping


Ship-To Address 1855 South Grant Street
San Mateo, CA 94402
United States
Attn: FirstName LastName

Terms None

Lines

Advanced

Sort by
Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Purple Spiral Notebook	200	Each	0.50	100.00	0.00

Part Number
None

Per page 15 | 45 | 90

Total **100.00** USD

[Create Invoice](#) [Save](#) [Print View](#)

Comments

[Add Comment](#)

Tip: You can also click on the **Create Invoice from PO** button above the table on the **Invoices** page to go to the **Purchase Orders** page.

In the appearing window, you are asked to create a new or choose an existing invoice-from address. The most recently used address is at the top of the list.

Choose Invoice From Address [X]

Create New Invoice Compliant Remit-to or Choose Existing

Create new Compliant Remit-To Address + Create

13 Success St
Great City
CA, 13131
USA ✔ Choose

Cancel

When you create a new invoice-from address, you are guided through creating your legal entity. For more information, see [Set up E-Invoicing](#).

The selected or newly created legal entity is added to your invoice.

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 [Create or Edit an Invoice](#).

Similarly to creating an invoice, you can create a credit note by clicking on the **Create Credit Note** (📄) icon for the PO in the **Actions** column of the **Purchase Orders** table.

By clicking on the 📄 icon in the **Actions** column, you can create an ASN. For more information, see [Create or Update an ASN](#).

Note: The ASN feature is available only if your customer enables it for you.

By clicking on the 🛠️ icon in the **Actions** column or on the **Create Service/Time Sheets** button on the PO, you can create a service/time sheet. For more information, see [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.

Create a Credit Note

You can issue a credit note to:

- Resolve a dispute on an 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, click on the **Create Credit Note** button above the **Invoices** table on the **Invoices** page.

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

Credit Note ✕

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

Reason Resolve issue for invoice number

Other (e.g. rebate)

Cancel Continue

Resolve a dispute

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.

Credit Note ✕

How do you want to correct invoice "invoice123" ?

Completely cancel the invoice with a credit note i

Adjust invoice with a credit note i

Cancel Create

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](#).

Create the credit note similarly to creating an invoice. See [Create or Edit an Invoice](#).

If you completely cancel the invoice, you can edit only the following fields: **Credit Note Date**, **Credit Note Number**, and **Credit Reason**. 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 information on invoice lines, you can edit the the following fields: **Credit Note Date**, **Credit Note Number**, **Credit Reason**, and line adjustment information (for example, price and 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.

Record a credit

Select **Other** and click **Continue**. In the appearing popup, choose the invoice-from address and follow the instructions in [Create or Edit an Invoice](#).

Create or Edit an Invoice

From the **Invoices** page, you can:

- **Create Invoice from PO.** For more information, see [Create an Invoice from a PO](#).
- **Create Invoice from Contract**
- **Create Blank Invoice** (invoice without a contract)
- **Create Credit Note.** For more information, see [Create a Credit Note](#).

Invoices

Instructions From Customer
This is new Version of Invoice .. This text will be displayed on Coupa PO and PO Invoicing screens for all your suppliers.

Create Invoices ⓘ

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

Export to ▾ View All ▾ Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	11/07/18	Draft	7935	10.00 USD	No	

Note: Buttons are active only for the actions that you can do. For example, if your customer didn't 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 can't create an invoice as expected.

When creating an invoice from a contract, you must first select the contract from the drop-down list.

Select Contract ✕

Select a Contract

Test Hyper Contract 1 ▾

Test Hyper Contract 1

Test Hyper Contract 2

Cancel Create

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.

Create Invoice Create

General Info

* Invoice #

* Invoice Date

Payment Term Accelerate Payment

* Currency

Delivery Number

Status

Shipping Term

Image Scan No file selected.

Supplier Note

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

Discount Amount

Payment Order Reference

From

* Supplier

Supplier Tax ID

* Invoice From Address
 123 Success Ave
 Results City, XY 99999
 United States

* Remit-To Address
 123 Success Ave
 Results City, XY 99999
 United States

* Ship From Address
 123 Success Ave
 Results City, XY 99999
 United States

To

Customer

* Bill To Address

Buyer Tax ID

Ship To Address

Lines

Line Level Taxation

Add Line	Subtotal		0.00
	Shipping	<input type="text"/>	
	Tax Description (Shipping)	<input type="text"/> <input type="text"/>	0.000
	Handling	<input type="text"/>	
	Tax Description (Handling)	<input type="text"/> <input type="text"/>	0.000
	Misc	<input type="text"/>	
	Tax Description (Misc)	<input type="text"/> <input type="text"/>	0.000
	Tax Description	<input type="text"/> <input type="text"/>	0 0.00
	Total Tax		0.00
	Total		0.00

Comments

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 E-Invoicing](#).

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.

Note: When adding lines, you cannot pick lines from a PO.

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.

Subtotal			363.00
Shipping		<input type="text" value="10"/>	
Tax Description (Shipping)	US: CA - 8.25% ▼	8.25	0.83
Handling		<input type="text" value="8"/>	
Tax Description (Handling)	US: CA - 8.25% ▼	8.25	0.66
Misc		<input type="text" value="1"/>	
Tax Description (Misc)	US: CA - 8.25% ▼	8.25	0.08
Total Tax			1.57
Total			383.57

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.

☰ Lines
 Line Level Taxation

Type	Description	Qty	UOM	Price	Total
	LaptopX	1.00	Each	240.00	240.00 ✖

PO Line	Contract	Billing	Receipt	Match Reference Key	Supplier Part Number	Commodity
3011-1	<input type="text"/>	SF-IT-Assets	None	<input type="text"/>	123456	Laptops

Tax Description	Tax Rate	Tax Amount	Tax Reference	+
<input type="text"/>	0	0	<input type="text"/>	

Add Tag

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.

Catalog 3 Edit [Back](#)

Customer Coupa

* Catalog Name

Status Draft

Start Date date when catalog prices become effective

Expiration Date date when catalog prices become expired

Currency

0 Items Changed (0 unchanged)

0 ↑
Price Increase

0 ↓
Price Decrease

0
Other Fields Updated

0
New Items

0
Deactivated Items

Items Included in Catalog

Create Load from file Export to ▾ View All ▾ Advanced

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
No rows.							

Per page **15** | [45](#) | [90](#)

Items Offered to Coupa Inspire

Export to ▾ View All ▾ Advanced

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
No rows.									

Per page **15** | [45](#) | [90](#)

Comments

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.

Item Changes	Description
Price Increase	Total number of items in the catalog that increased in price. New items don't appear in this count.
Price Decrease	Total number of items in the catalog that decreased in price. New items don't 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, you 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 version.

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

You can create a service/time sheet from a 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.

Service/Time Sheets #504

PO DB0110000461

Time Sheet

◀ January 06, 2019 - January 12, 2019 ▶

	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	* Total	
PO Line #									
Item									
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0	✖
Submitted: 0.0 Hour									
Attachments									
Add File URL Text									

Total hours: 0.0

Services

Line #	Submission Type	PO Line #	Item	* Quantity	Unit Of Measure	
2	New	2	Project Plan	0.000	Each	✖
Due Date		Actual Completion		Attachments		
None		mm/dd/yy		Add File URL Text		
Notes To Supplier						
None						
Line #	Submission Type	PO Line #	Item	* Amount		
3	New	3	Testing Assistance	0.000	USD	✖
Due Date		Actual Completion		Attachments		
None		mm/dd/yy		Add File URL Text		
Notes To Supplier						
None						

Cancel Save as Draft Submit

Comments

Add Comment

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.

Items Included in Catalog							
Create		Load from file		Export to ▾		View All ▾ Advanced Search 🔍	
Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Item1	111	New	100.00		USD		✎ ✖

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 won't 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 can't 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 can't 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're 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 doesn't 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.

Bulk Load Item Updates for Catalog1

Follow these steps to upload items

1. **Download** the [CSV template](#) or the [current list of items](#).
2. **Fill in or update the CSV file.** [Click here](#) for a description of the required and optional fields in the template.
 - Fields marked with a "*" are mandatory.
3. **Load the updated file**

No file selected.

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

Start Upload

- 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 New	Row 2 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 CAN
Description*	CASE CARAMILK EGG 34G BULK CAN	CASE KING SIZE CARAMILK CAN
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.

Create or Update an ASN

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).

Create Advance Ship Notice

General Info

* ASN #

Status draft

Ship Date 📅

Delivery Date 📅

Ship To

Address 123 Value Drive 📍
San Mateo, CA 94402
USA

Shipping Info

Tracking Number

Carrier

Shipping Method

Ship Note

Lines

1 Description	Quantity	UOM	Received Quantity	Status
Blue Pens	<input style="width: 50px;" type="text" value="0.00"/>	Box	0	draft ✖

Supplier Part Num	PO #	PO Line	Po Line Quantity
123456789	3049	1	100.0

Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty

Comments

Cancel Save Submit

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 haven't sent the customer an invoice yet.

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.

The screenshot shows the 'Advance Ship Notices' page in the Coupa Supplier Portal. The navigation menu includes Home, Profile, Orders, Service/Time Sheets, **ASN**, Invoices, Catalogs, Add-ons, and Admin. A 'Select Customer' dropdown is set to 'Coupa'. The page title is 'Advance Ship Notices'. Below the title, there is an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search bar. The main table has the following data:

ASN Number	Status	Delivery Date	Last Updated By	Last Updated Date	Actions
111	Draft	None	John Doe	06/09/17	
222	Pending Receipt	06/02/17	Jane Doe	05/31/17	

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	<p>Click on the icons for the following actions:</p> <ul style="list-style-type: none"> - Edit the ASN. - Delete the ASN. - Cancel the ASN. <p>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.</p>

ASNs can have the following statuses:

Status	Description
Draft	The ASN has been created, but it hasn't 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Catalogs' highlighted. Below it, a 'Select Customer' dropdown is set to 'Coupa'. The main content area is titled 'Catalogs' and features a table with the following data:


Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions
Catalog1	05/15/17	05/16/17	06/01/17	12/31/17	Accepted	No	
Catalog2	07/06/17	None	01/01/18	06/30/18	Draft	No	

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: <ul style="list-style-type: none"> - Edit the catalog.

Column	Description
	<ul style="list-style-type: none">  - Delete the catalog. <p>You can edit only draft catalogs. You can delete catalogs in draft or awaiting/pending approval status.</p>

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	There's something 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a header with the Coupa logo and 'supplier portal'. On the right, there are links for 'SUPPLIERNAME', 'NOTIFICATIONS' (with a red badge showing '2'), and 'HELP'. Below the header is a navigation menu with tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (which is highlighted), 'Catalogs', 'Add-ons', and 'Admin'. Below the navigation menu is a 'Select Customer' dropdown menu currently set to 'Coupa'. The main content area is titled 'Invoices'. Below the title, there are controls for 'Export to', 'View' (set to 'All'), and a search box. The main part of the page is a table with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
123	06/01/17	Draft	3050	113.20	No	
456	06/01/17	Disputed	None	150.00	No	
789	05/27/17	Pending Approval	2949	3,750.00	No	
121314	05/16/17	Approved	2891	15,000.00	No	

Below the table, there are pagination controls: 'Per page 15 | 45 | 90'. At the bottom, there are radio buttons for 'No Contract' (selected) and 'Invoice Against Contract', along with 'Create' and 'Credit note' buttons.

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.
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.

Column	Description
Actions	Click on the Edit (✎) icon to edit an invoice. You can edit only draft invoices.

Invoices can have the following statuses:

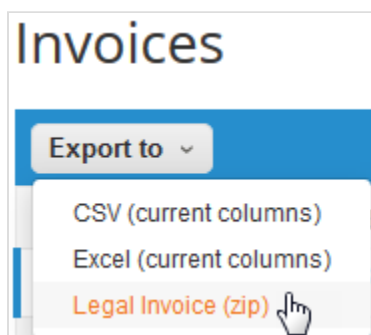
Status	Description
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. For more information, see Disputed invoices .
Draft	The invoice has been created, but it hasn't been submitted to your customer yet.
Invalid	Specific for compliant e-invoices 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	There's something 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 POs

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Orders' selected. Below it, a 'Select Customer' dropdown is set to 'Coupa'. The main heading is 'Purchase Orders'. Below the heading is a table with the following data:





PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3050	05/31/17	Issued	None	200 Each of Purple Spiral Notebook	No	100.00 USD	[Icons]
3049	05/31/17	Issued	None	1 Box of Blue Pens	No	90.00 USD	[Icons]

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 customer when you open the PO. Note: If you need urgent communication, contact your customer directly.

Column	Description
Total	Total amount of the PO.
Actions	<p>Click on the icons for the following actions:</p> <ul style="list-style-type: none">  - Create (flip the PO into) 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.

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.
Canceled	The PO is cancelled and doesn't 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.
Error	There's something 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a header with the Coupa logo and 'supplier portal'. On the right, there are links for 'SUPPLIERNAME', 'NOTIFICATIONS 2', and 'HELP'. Below this is a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets (selected), ASN, Invoices, Catalogs, Add-ons, and Admin. Underneath the navigation bar, there's a breadcrumb trail: Service/Time Sheets > Service/Time Sheet Lines. A 'Select Customer' dropdown menu is set to 'Coupa'. The main section is titled 'Service/Time Sheets' and features a table with the following data:




Service/Time Sheets	Purchase Order	Status	Submitted At	Approved At	Actions
468	3472	Draft	None	None	[Edit] [Delete]
353	3434	Approved	03/02/17	03/02/17	
352	3434	Pending Approval	03/02/17	None	[Refresh]
317	3306	Pending Approval	02/25/17	None	[Refresh]
316	3305	Pending Approval	02/25/17	None	[Refresh]
315	3305	Draft	None	None	[Edit] [Delete]

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 when you submitted the service/time sheet to your customer.
Approved At	Date when your customer approved the service/time sheet.
Created By	Date when you created the service/time sheet.
Actions	<p>Click on the icons to perform the following actions on a service/time sheet:</p> <ul style="list-style-type: none">•  - Edit.•  - Delete.•  - Withdraw. <p>You can edit or delete only draft service/time sheets. You can withdraw service/time sheets only in pending approval status.</p>

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.

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
3050	1	Issued	200 Each of Purple Spiral Notebook	100	100.00
3048	3	Issued	1 Box of Pen 101	1	90.00
3048	2	Issued	1 Box of Pen 102	1	80.00
3048	1	Issued	1 Box of Pen 103	1	100.00

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 the PO status list above.
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.

Lines																				
Advanced Search Sort by Line Number: 0 → 9																				
1	Type	Item	Price	Total	Invoiced															
		Service Amount Line	20,000.00	20,000.00	0.00															
<table border="1"> <thead> <tr> <th>Confirmed</th> <th>Pending Approval</th> <th>Pending Rework</th> <th>Discarded</th> <th>Part Number</th> <td colspan="2"></td> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>1,000.00</td> <td>0.00</td> <td>0.00</td> <td>None</td> <td colspan="2"></td> </tr> </tbody> </table>							Confirmed	Pending Approval	Pending Rework	Discarded	Part Number			0.00	1,000.00	0.00	0.00	None		
Confirmed	Pending Approval	Pending Rework	Discarded	Part Number																
0.00	1,000.00	0.00	0.00	None																

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

Service/Time Sheet Lines						
View All Advanced Search						
Match all conditions						Add group of conditions
	Order Header ID	is	10000459			
and	Order Line Number	is	1			
and	Status	is	<div style="border: 1px solid gray; padding: 2px;"> Approved Draft Pending Approval </div>			
						Cancel Search
Service/Time Sheet	Service/Time Sheet Line Number	Service Type	Description	Quantity	Unit Of Measure	
499	1	Service (Amt)	Service Amount Line		None None	

For more information, see [View Service/Time Sheet Lines](#).

View Service/Time Sheet Lines

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

The screenshot shows the 'Service/Time Sheet Lines' page. At the top, there is a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below this, there is a sub-navigation bar with 'Service/Time Sheets' and 'Service/Time Sheet Lines' (which is highlighted). A 'Select Customer' dropdown menu is set to 'Coupa'. The main heading is 'Service/Time Sheet Lines'. Below the heading is a table with a 'View' dropdown set to 'All' and an 'Advanced' button. The table has the following data:

Service/Time Sheet	Service/Time Sheet Line Number	Service Type	Description	Quantity	Unit Of Measure
352	1	Service (Amt)	Service Amount Line	None	None
352	2	Service (Qty)	Service Quantity Line	2	Each

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 a service/time sheet line, you can see the customer's notes, for example, about what needs more work.

Service/Time Sheets #499

PO DB0110000459

Services

Line #	Submission Type	PO Line #	Item	Amount
1	New	1	Service Amount Line	1,000.00 USD
	Due Date	Actual Completion	Attachments	
	11/30/18	11/21/18	None	
	Notes To Supplier		Action	
	Floor 2 electricals not up to code.		Rework	

Administer the CSP

This chapter contains the following topics:

Admin Page

The admin page lets you manage merge requests, set up your remit-to addresses, accept the terms of use, and more.

Manage Users

Manage user permissions and customer access.

Manage Merge Requests

Merge accounts and manage merge requests.

Set up E-Invoicing

Set up your account to create e-invoices by adding legal entities / remit-to addresses.

Add Fiscal Representatives

Add fiscal representatives in countries where you are not registered with a local address but need to be registered for tax purposes.

View Remit-to Information

Provide remit-to address and associated tax information to meet compliance regulations when invoicing.

Terms of Use

View and sign the terms of use to work with the CSP.

Set Coupa Accelerate Preferences

Set your early payment discount terms and apply them to invoices and/or purchase orders to get paid faster.

Access Add-ons

Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.

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 electronic invoicing and fiscal representatives; you can view and sign the terms of use, and set your early payment discount terms (Coupa Accelerate preferences).

The screenshot shows the 'Admin Users' section of the Coupa Supplier Portal. The page header includes the Coupa logo and 'supplier portal' text, along with a user dropdown 'SUPPLIERNAME', a notification bell with '2' alerts, and a 'HELP' dropdown. The navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin (which is highlighted). Below the navigation bar, the 'Admin Users' section features a sidebar with links for Users, Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To, Terms of Use, and Coupa Accelerate Preferences. The main content area displays a table with the following data:

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com Edit	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Coupa

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.
E-Invoicing Setup	Set up your account for electronic invoicing.
Fiscal Representatives	Add fiscal representatives that you need if you have operations in a country 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.
Coupa Accelerate Preferences	Set preferred accelerated payment terms (early payment discounts terms) to be applied to any of your customers across all your invoices.

Manage Users

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.

Click on the **Admin** tab on the main menu. The **Admin Users** page appears.

The screenshot shows the 'Admin Users' page in the Coupa supplier portal. The page has a blue header with the Coupa logo and 'supplier portal' text. On the right of the header, there are links for 'SUPPLIERNAME', 'NOTIFICATIONS' (with a red badge showing '2'), and 'HELP'. Below the header is a navigation menu with tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin' (which is highlighted). The main content area is titled 'Admin Users' and includes an 'Invite User' button. On the left, there is a sidebar with a 'Users' section and several links: 'Merge Requests', 'E-Invoicing Setup', 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Coupa Accelerate', and 'Preferences'. The main content area contains a table with three columns: 'Users', 'Permissions', and 'Customer Access'. The table has one row with the following data:

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com Edit	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Coupa

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

Edit user access for First Last ✕

User info

* First Name

* Last Name

* Email

Permissions

- All
- Admin
- Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets

Customers

- All
- Coupa

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 can't 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 can't edit existing users. The permissions on the invitation can't exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers.
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.

For auditing purposes, Coupa doesn't allow users to be deleted, so you can't delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

If you deactivate 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.

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here](#).

SupplierA
supplierA@supplier.com

SupplierB
supplierB@supplier.com

If you know that a suggestion is invalid, click on the **Remove button** and you won't 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.

Request Account Merge

You're about to merge your profile and users with [SupplierA](#). Select the owner for the merged account. For more info on merging, [Click here](#).

* Account Owner My Account

Their Account

By choosing this option I understand that I will no longer be the account owner.

* Note

I'm not a robot



reCAPTCHA
Privacy - Terms

Cancel

Send Request

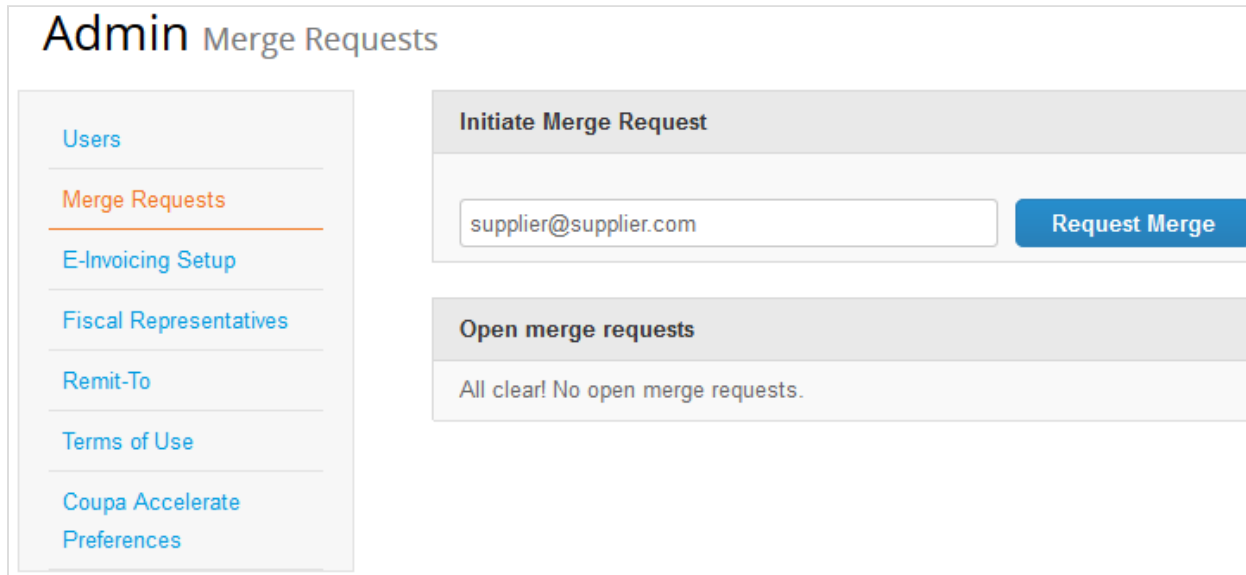
Selection	Description
My Account	This causes the other account to be merged into your company account. The other user's company account is removed. You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information, see Manage Users .
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.

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 isn't 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.



Admin Merge Requests

[Users](#)

[Merge Requests](#)

[E-Invoicing Setup](#)

[Fiscal Representatives](#)

[Remit-To](#)

[Terms of Use](#)

[Coupa Accelerate](#)

[Preferences](#)

Initiate Merge Request

[Request Merge](#)

Open merge requests

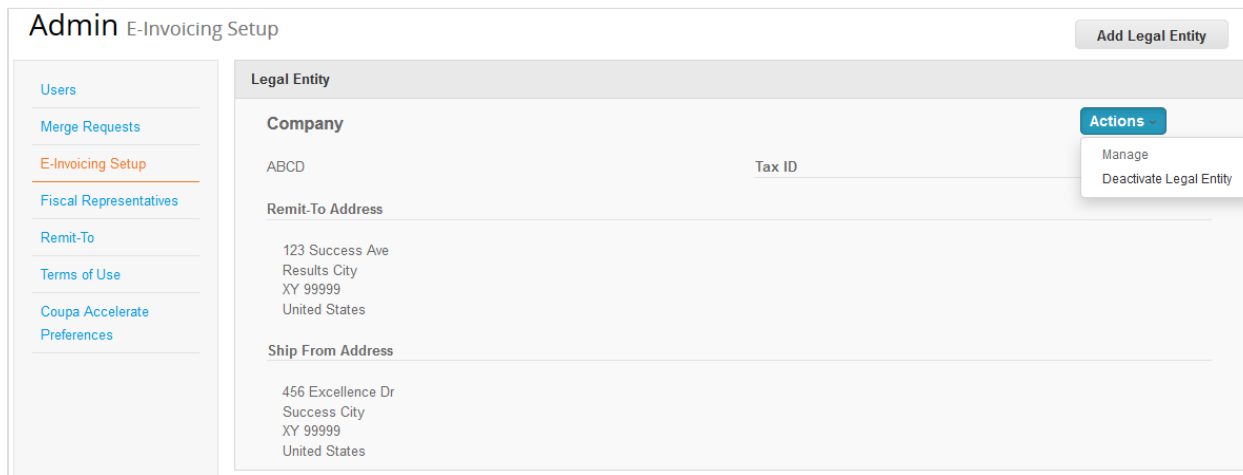
All clear! No open merge requests.

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 E-Invoicing

To set up your account to create electronic invoices, click on the **E-Invoicing Setup** link on the left of the **Admin** page. The **Legal Entity** page appears. You can add new legal entities, or manage or deactivate existing ones.



To add a legal entity, click on the **Add Legal Entity** button in the top right corner and enter the official name of your business that is registered with the local government and select the country 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 (*), and click **Done**.

Field/Checkbox	Description
Which customers do you want to see this?	<p>Select all or the specific customer(s) that you want to see your legal entity information.</p> <p>Customers that use Coupa for payments are marked with the Coupa Pay  icon.</p> <p>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:</p> <ul style="list-style-type: none"> Valid:  Invalid:  Pending validation: 
What address do you invoice from?	<p>Required for invoicing.</p> <p>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.</p>
Country	The country you selected when adding the legal entity.

Field/Checkbox	Description
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.
Banking Information	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 This information is displayed on the invoice.
Bank Account Country	Select the country from the drop-down list.
Bank Account Currency	Select the currency from the drop-down list.
Bank Name	Enter the name of your bank.
Beneficiary Name	Enter the name of the beneficiary.
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.
Account Number	Must be 4-17 digits.
Account Number Confirm	Confirm your account number by entering it again.
IBAN	Must be 5-34 alphanumeric characters without spaces.
SWIFT/BIC Code	Must be eight or eleven characters. The first six characters must be letters.
Bank Account Type	Type of the bank account: business or personal.
Bank Address	Includes address-specific fields: Address Line 1 , Address Line 2 , City , State , and Postal Code .
What is your Tax ID?	Enter your local tax ID if you are not registered for VAT or GST in some countries.
Country	Select your tax country form 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.

Field/Checkbox	Description
I don't have a VAT/GST Number	Select the checkbox to add your local tax ID.
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.

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

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Remit-To	Banking Information	Status	
123 Success Street Results City 12345 United States	None	Active	<input type="button" value="Manage"/>

To add a new remit-to address, click on the **Add Remit-To** button and fill in at least the mandatory fields (marked with a red asterisk) and click **Continue**.

Information	Description
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.) Address Line 1, City, Postal Code, and Country are mandatory.
Integration Information	Code to tie your CSP remit-to address with the corresponding address in your ERP.
Banking Information	See the table above.
Remit-To Contact	Optional contact information for the remit-to address: name, email, phone number, fax number, and website.


Information	Description
Which customers do you want to see this?	See the table above.

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.

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 e-invoicing 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.

Setup Complete ✕



Congratulations!

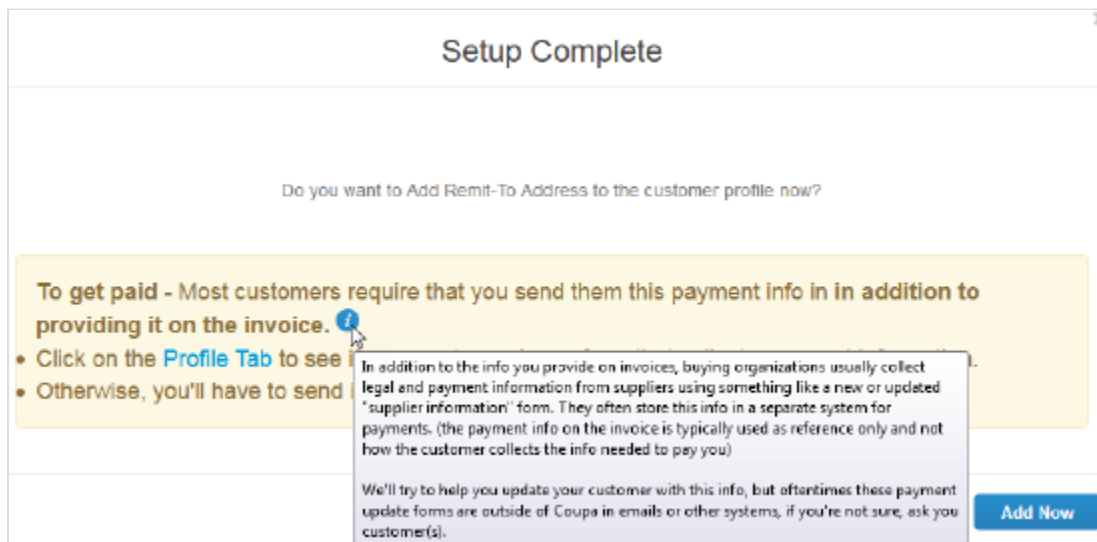
This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** ⓘ

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Go to Orders
Go to Invoices
Return to Admin

The **Info** icon with the tooltip provides more details on how the legal entity information is used and updated.



Tip: If you didn't specify a remit-to address when setting up your invoice-from address, you can add it from the **Setup Complete** page by clicking **Add Now**.

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.
- Click on the **Profile** tab in the CSP and select the customer for whom you want to update your profile.

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

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

coupa supplier portal SUPPLIER1 | NOTIFICATIONS 0 | HELP

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

Profile Coupa

Supplier Information Supplier1

Name Supplier1

Display Name

Remit-To Address Lines

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add

Decline Save Submit

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.

Choose Remit-To Address ✕

Create New Invoice Compliant Remit-to or Choose Existing

Create new Compliant Remit-To Address

+ Create New


123 Success Ave ✓ Choose
Results City, XY 99999
United States
United States

Cancel

When you choose an existing remit-to address, the new remit-to address is created for SIM and its fields are populated with data from the chosen remit-to address.

Note: From among populated fields, only bank 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, delete your remit-to address and go to **E-Invoicing Setup** to correct the chosen remit-to address that you want to use to create the new one.

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 **E-Invoicing 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.

Add Fiscal Representatives

You need a fiscal representative if you are legally registered in Country A, but you have some operations in Country 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 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 E-Invoicing](#).

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.

Admin Fiscal Representatives Add Fiscal Representative

Name	Country	Tax ID	Associated Tax Registrations
None			

In the appearing window, fill in at least the mandatory (address) fields (marked with a red asterisk).

Fiscal Representatives ✕

Name

Code

Address

* Address Line 1

Address Line 2

* City

State

* Postal Code

* Country

* VAT ID

Contact

First Name

Last Name

Email

Work Phone

Mobile Phone

Fax Number

Web Site

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 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 can specify/manage remit-to addresses when setting up (adding legal entities for) electronic invoicing or creating invoices. For more information, see [Set up E-Invoicing](#) and [Create or Edit an Invoice](#).

On the left of the **Admin** page, click on the **Remit-To** link to view the list of remit-to addresses and their details, for example, the customers they are assigned to.

The screenshot shows the 'Admin Remit-To' interface. At the top, a yellow banner reads: 'To manage remit to addresses, please visit the [E-Invoicing Setup](#) section'. Below this is a table with three columns: 'Remit-To Address', 'Banking Information', and 'Customers'. The 'Remit-To Address' column contains the following information:

Remit-To Address	Banking Information	Customers
Remit-To Location Address: Success Street Value City United States 12345 Preferred Language: English (US)		None

A 'View Details' button is located below the address information in the first column.

Click on **View Details** to see more information.

Assign Remit-To Address ✕

The Remit-To is the address displayed on the legal invoice. Create additional Remit-To addresses if you have more than one address.

Create a Remit-To address to make it available on invoices to specify the details of how you would want to be paid. The Remit-To name helps when creating invoices online. The Remit-To code is for direct integration only

Remit-To Name

Remit-To Code

Remit-To Location

Address: Success Street
Value City
United States
12345
Preferred Language: **English (US)**

Tax Registration

Tax Country: United States

Cancel

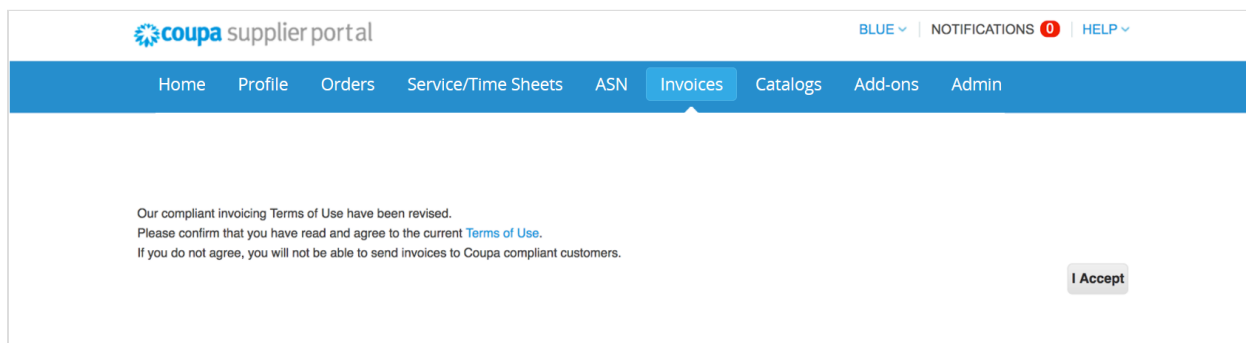
Terms of Use

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 can't 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.

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 Coupa Accelerate Preferences

Overview

Coupa Accelerate 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.

Note: You can use Coupa Accelerate 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 Accelerate 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 Accelerate 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 Accelerate 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 Accelerate 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 Accelerate 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.

Admin Coupa Accelerate Preferences

Edit Preferences

- Users
- Merge Requests
- E-Invoicing Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Coupa Accelerate Preferences

Coupa Accelerate Preferences

To get your invoices paid faster by offering an invoice discount, please click the 'Edit Preferences' button. Your customers can, at their discretion, use Coupa Accelerate to automatically apply the preferred payment term to any of your invoices. You can change your preferences at any time on this page. Email accelerate@coupa.com if you need any assistance.

Your original payment term	Your preferred accelerated payment term
Net 30	None
Net 45	None
Net 60	None
Net 75	None
Net 90	None
Net 120	None

Approver name

Approver email

Apply accelerate preference to all invoices false

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

Coupa Accelerate Preferences ✕

To get your invoices paid faster by offering an invoice discount, please set your preferences below. Your customers can, at their discretion, use Coupa Accelerate to automatically apply the preferred payment terms to any of your invoices. You can change your preferences at any time on this page. Email accelerate@coupa.com if you need any assistance.

Your original payment term
Your preferred accelerated payment term

Net 30	<input type="text" value="None"/>
Net 45	<input type="text" value="None"/>
Net 60	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #0070c0; color: white; padding: 2px;">0.5%/35 NET 45</div> </div>
Net 75	<input type="text" value="1%/25 NET 45"/>
Net 90	<input type="text" value="1.5%/15 NET 45"/>
Net 120	<input type="text" value="None"/>

Person or Group at your company (typically finance or treasury) who has approved your preferred accelerated payment term

* Name

* Email

Apply to ALL invoices. (Including non-PO invoices and Coupa invoices not submitted through this Supplier Portal). [Learn more](#)

Cancel
Save

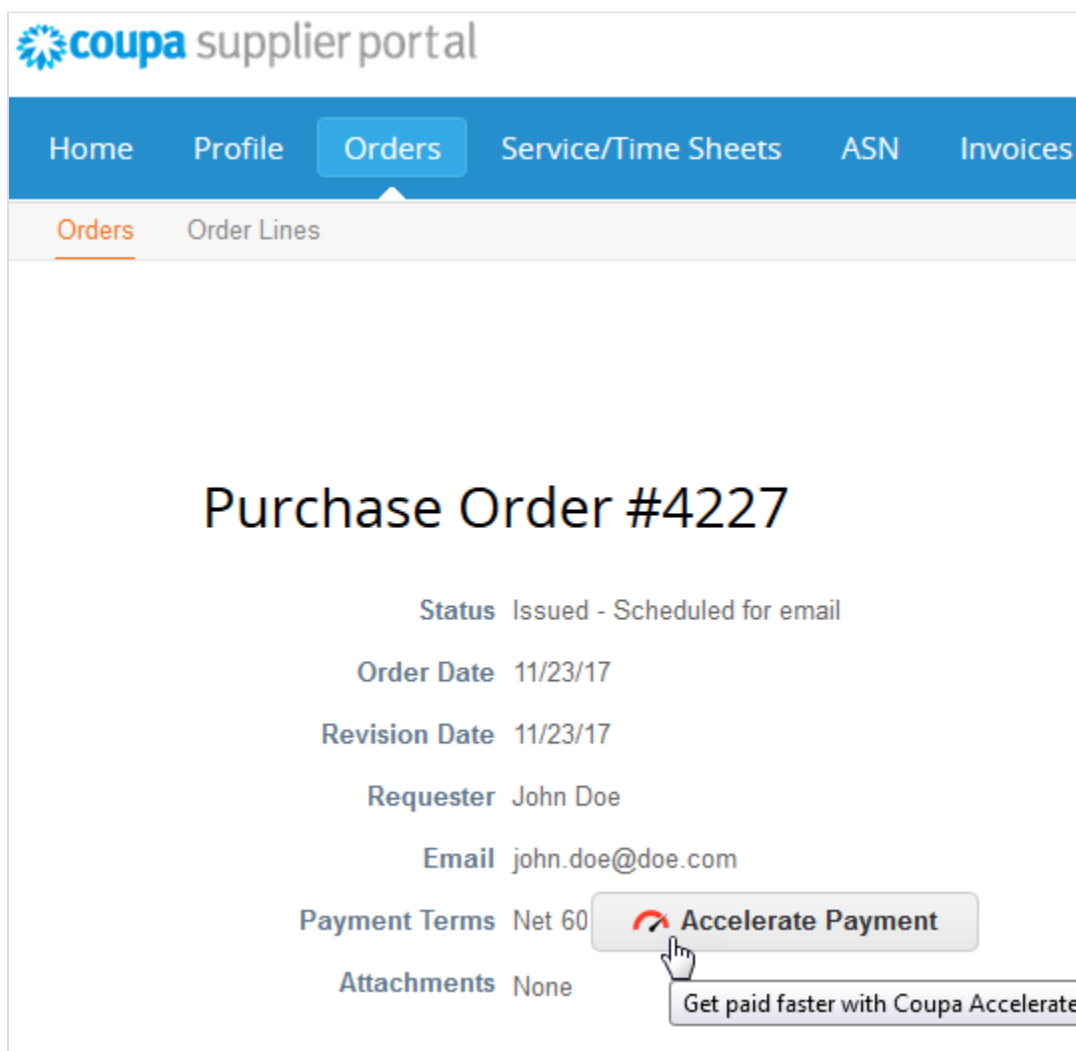
For a specific transaction (purchase order or invoice), you can choose to change a net payment term (for example, Net 60) to a discount payment term (for example, 2.5% 10 Net 60) if your customer's configured **Payment Terms** is enabled for these Coupa-preferred payment terms. You can "accelerate" the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



The screenshot displays the Coupa Supplier Portal interface. At the top, the logo "coupa supplier portal" is visible. Below the logo is a navigation bar with tabs for "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", and "Invoices". The "Orders" tab is selected. Underneath, there are sub-tabs for "Orders" and "Order Lines". The main content area shows details for "Purchase Order #4227". The status is "Issued - Scheduled for email". Other details include "Order Date 11/23/17", "Revision Date 11/23/17", "Requester John Doe", and "Email john.doe@doe.com". The "Payment Terms" are listed as "Net 60". Next to this field is a button labeled "Accelerate Payment" with a red circular arrow icon. A mouse cursor is pointing at the button, and a tooltip below it reads "Get paid faster with Coupa Accelerate".

In the appearing **Accelerate Payments** dialog box, select the new payment term and click **Update**.

Accelerate Payments

Get paid faster with Coupa Accelerate. [Learn more](#)

Select the new term and click the Update button to change the terms for PO #4227

Current Payment Term		New Payment Term
Net 60	➔	1.5/30 Net 60 ▾

I am authorized to choose payment terms.

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

Purchase Order #4227

Congrats! You have accelerated payment for PO #4227

Status Issued - Scheduled for email

Order Date 11/23/17

Revision Date 11/23/17

Requester John Doe

Email john.doe@doe.com

Payment Terms 1.5/30 Net 60
Accelerated ⓘ

Attachments None

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 Accelerate.
- 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.

coupa Purchase Order #1000000109

Hi Jim,

This is PO #1000000109

Submitted By John Doe
Supplier Acme Games
Total **220.00 USD**

Items	Test-Qty-1	1.0 Hour @ 20.00	20.00 USD
	Test-Amt-1		200.00 USD

[View Order](#) [Accelerate Payment](#)

More Detail

PO ID 1000000109	Department None
Status Issued - Sent via Email	Last Opened None

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

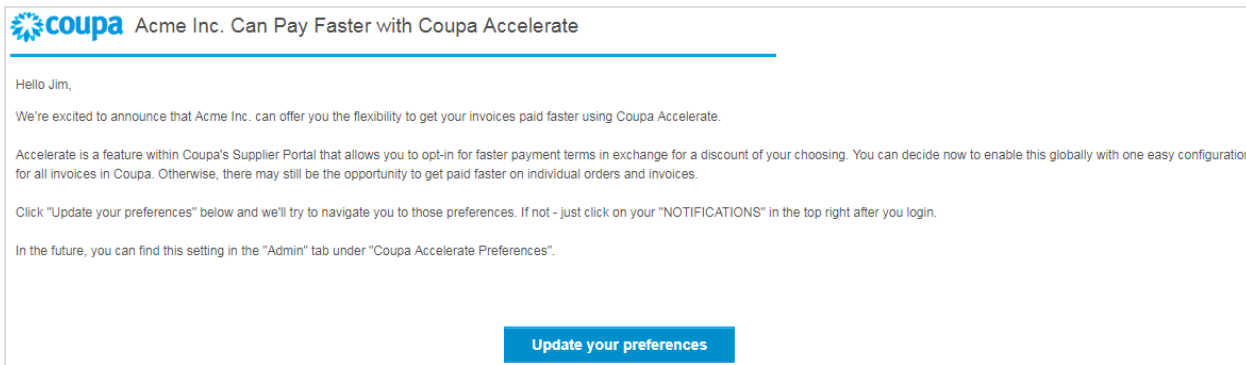
Note: If you are not logged into the CSP, you are directed to the **Log In** page. After logging in, you need to navigate to the PO that you want to accelerate.

Notifications

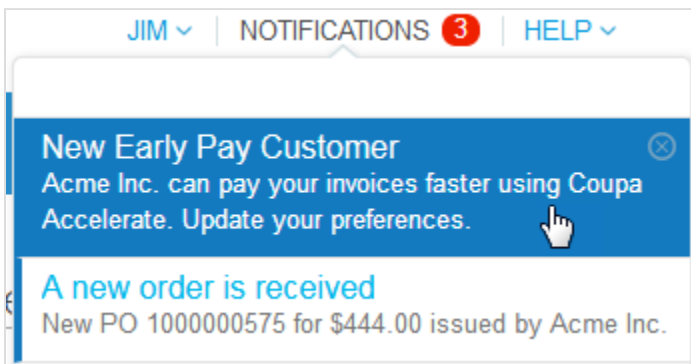
If your customers turn on Coupa Accelerate and you are linked to the CSP, you receive notifications of the early payments opportunity. Depending on your [notification preference settings](#), you receive email, online, and/or SMS notifications.

Note: Notifications are sent within 24 hours after your customers enable Coupa Accelerate.

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.

Note: If you are not logged into the CSP, you are directed to the **Log In** page. After logging in, you need to navigate to the **Admin > Coupa Accelerate Preferences** page.

Access 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:

The screenshot shows a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons (selected), and Admin. Below the navigation bar are five add-on cards:

- COUPA ADVANTAGE**: Pre-negotiated pricing of your goods or services you can offer to any Coupa buyer. [Learn More](#)
- EARLY PAYMENT DISCOUNTS**: Get access to cash earlier by directly offering early pay discounts to Coupa buyers. [Learn More](#)
- INVOICE FINANCING**: Get access to cash earlier by connecting with Coupa's preferred financing partners. [Learn More](#)
- COUPA Business Spend Management**: Learn more about using the Coupa platform to better manage your own spend. [Learn More](#)
- ENHANCE YOUR SUPPLIER PROFILE**: Improve your profile on the Coupa Supplier Portal to connect with more Coupa buyers. [Learn More](#)

Clicking on an image or on a **Learn more** link directs you to the relevant pages to find more information about these add-ons.

Add-on	Description
Coupa Advantage	A non-profit program that offers pre-negotiated pricing of goods or services to all customers from trusted suppliers. You can express interest in participating in this program.
Early Payment Discounts	Coupa Accelerate allows customers to select acceptable early payment terms and helps suppliers get access to cash earlier by offering early payment discounts to their Coupa customers. Clicking on the Update Accelerate Preferences button takes you to the Admin > Coupa Accelerate Preferences page where you can set your preferred early payment discount terms.
Invoice Financing	Helps suppliers get access to faster and timely payments, even if their customers are not using Coupa Accelerate . A bank finances approved invoices based on supplier credit worthiness. You can express interest in participating in this program.
Coupa Business Spend Management (BSM)	Platform that provides powerful capabilities for customers and suppliers to conduct all their business spend activities in one place. You can express interest in becoming a Coupa customer.
Enhance Your Supplier Profile	Helps customers and suppliers find each other, get connected, and get paid. Clicking on the Enhance Profile button takes you to the profile page where you can update your public and customer-specific company profiles.

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.

Express Interest

We are thrilled that you are interested in this offering. Please verify the correct email and we will reach out to you within 2 business days.

Verify Your Contact Email

Your Message

We will send some of your basic contact information to the proper Coupa team when you click Submit. Please let us know any other relevant information regarding your interest in this Add-on.

CSP FAQ

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 identity.

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. See [Enabling or Disabling 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 [Registering 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. At the bottom of the page, select the **No Contract** radio button and click on the **Create** button. This will allow you to free-form an invoice line.

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. At the bottom of the page, click on the dropdown for **Invoice Against Contract** to select the contract, and then click on the **Create** button. This will allow you to free-form an invoice line.

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. Select the **No Contract** checkbox and click on the **Create** button on the page that appears.

Note: If you don't see the **Create** 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 [Creating a Credit Note](#).

Once an invoice is submitted, it can't be changed in any way. For more information, see [Creating or Editing 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. At the bottom of the page, select the **No Contract** radio button and click on the **Credit note** button. This will allow you to free-form an invoice line.

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. At the bottom of the page, click on the dropdown for **Invoice Against Contract** to select the contract, and then click on the **Credit note** button. This will allow you to free-form an invoice line.

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 **E-Invoicing 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.

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.



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