

Supplier Actions in CSP Quick Reference Guide

April 2024

Table of Contents

The purpose of this training is to:

- Review Supplier actions in CSP and provide a quick reference guide.

Coupa Supplier Portal - Overview

CSP Registration

CSP – Legal Entity

CSP - Purchase Orders

CSP - Invoices

CSP - Resolve Disputed Invoices

CSP - Credit Notes

Coupa Supplier Portal Overview

What is CSP?

- 1.The Coupa Supplier Portal (CSP) is a cloud-based platform, designed specifically for buyers and suppliers to collaborate.
- 2.Suppliers can use the CSP to view their purchase orders, create and submit invoices, and manage their catalogues with specific buyers.
- 3.The CSP also allows suppliers to check the status of all their transactions without having to contact an Accounts Payable department.

What are the benefits of Coupa Supplier Portal (CSP)

- ✓ **Free self-serve tool for suppliers:** Easily update profiles and contact information
- ✓ **Easy-to-use:** Receive all Purchase Orders and track payment status in real time
- ✓ **One stop shop:** Easily create and submit invoices online
- ✓ **Decreased paperwork:** No longer need to print, mail or fax invoices
- ✓ **Standard processes:** Faster authorizations

coupa supplier portal Secure

Login

• Email

• Password

[Forgot your password?](#)

[Login](#)

New to Coupa? [CREATE AN ACCOUNT](#)

Coupa Supplier Portal – Supplier Advantages

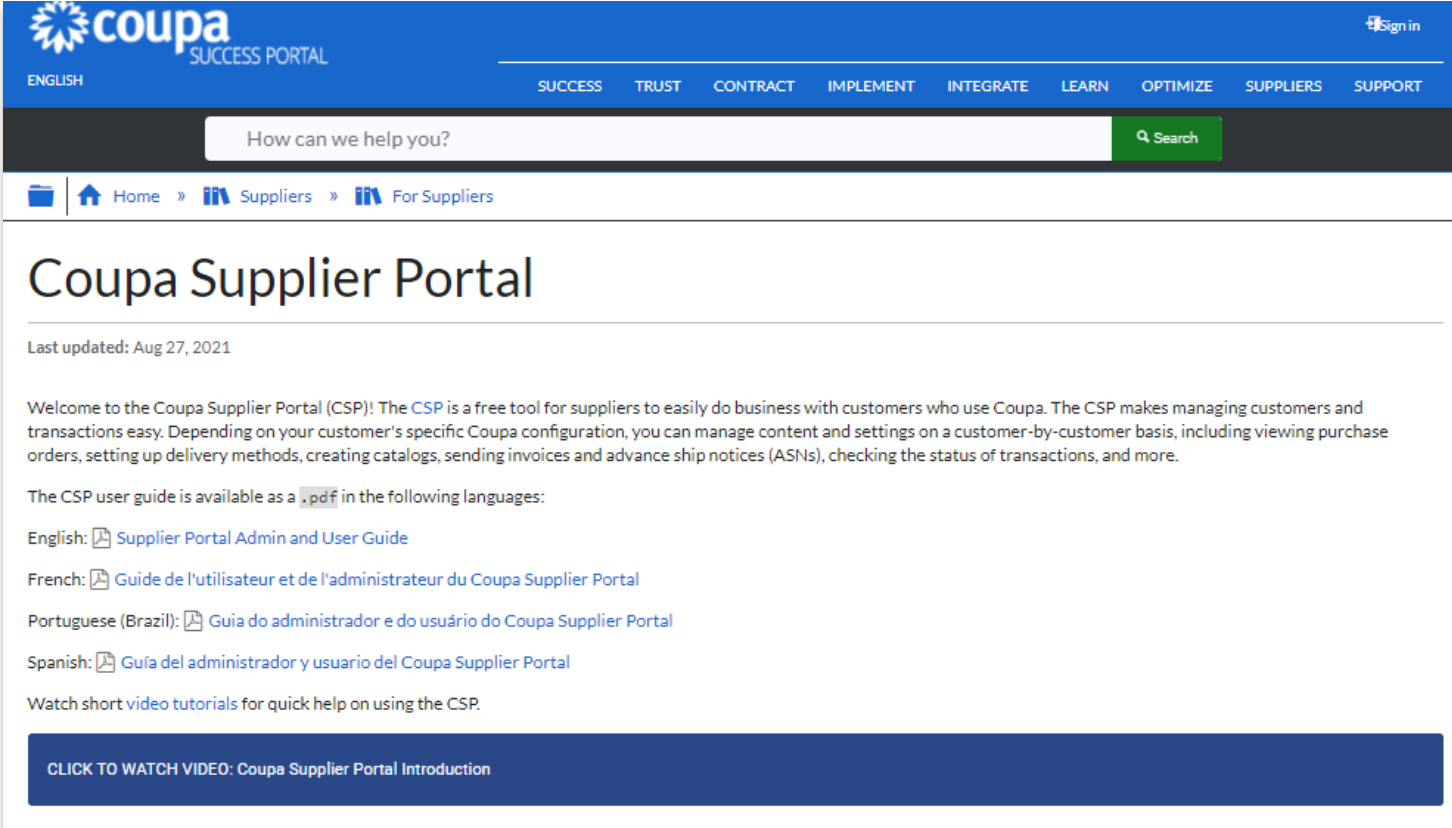
The below illustration describes the advantages of the Coupa Supplier Portal:



Coupa Supplier Portal – Key Links

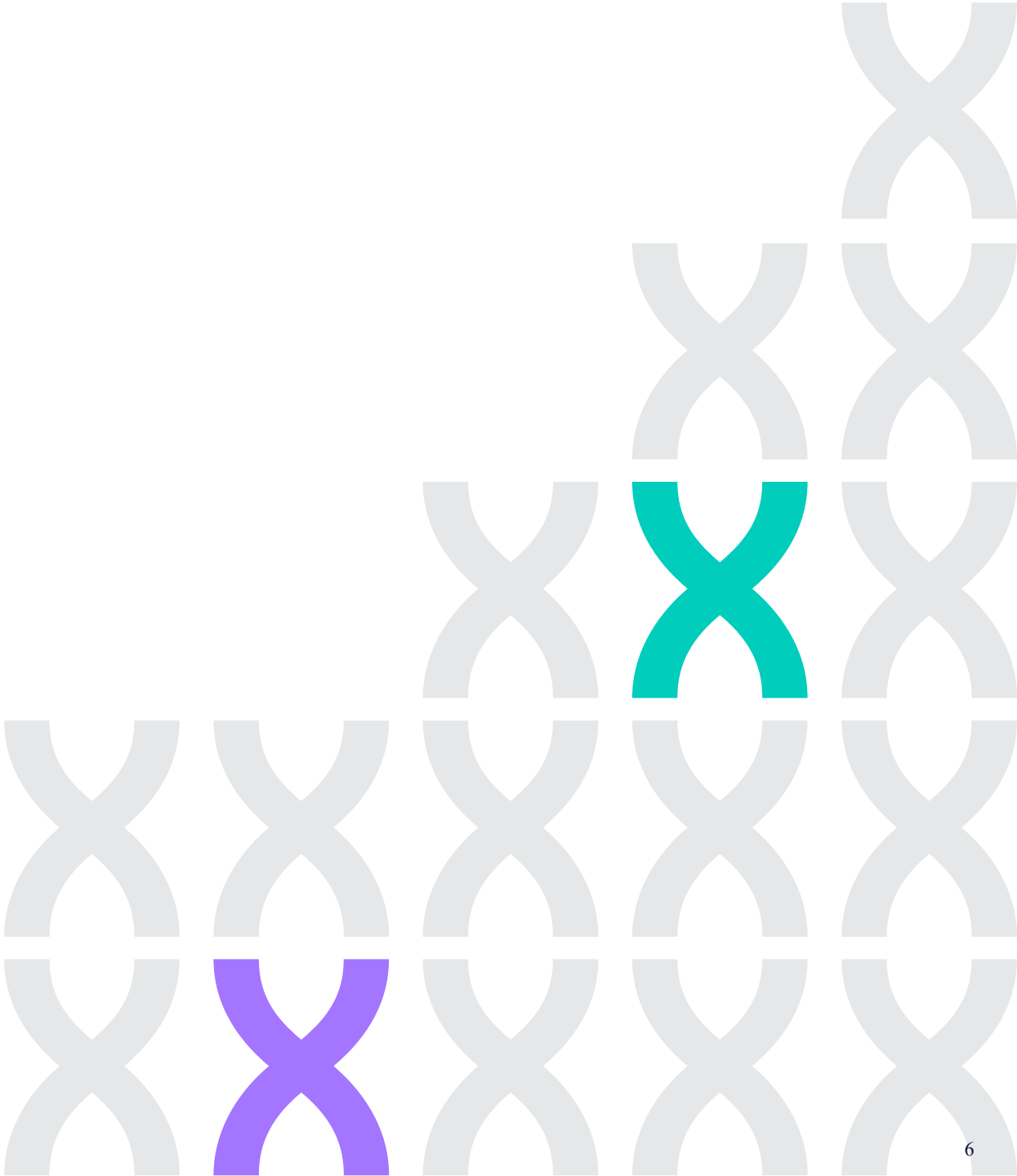
Refer to the below links to know more about the Coupa Supplier Portal:

1. Know more about CSP from [Coupa Success Portal](#)
2. Detailed CSP Reference Guide: [Supplier Portal Admin and User Guide](#)
3. Watch short [video tutorials](#) for quick help on using the CSP.



The screenshot shows the Coupa Supplier Portal homepage. At the top, there is a blue header with the Coupa logo and 'SUCCESS PORTAL' text. A navigation menu includes links for SUCCESS, TRUST, CONTRACT, IMPLEMENT, INTEGRATE, LEARN, OPTIMIZE, SUPPLIERS, and SUPPORT. Below the header is a search bar with the placeholder text 'How can we help you?' and a green 'Search' button. The breadcrumb trail shows 'Home » Suppliers » For Suppliers'. The main heading is 'Coupa Supplier Portal', followed by the text 'Last updated: Aug 27, 2021'. The main content area contains a welcome message: 'Welcome to the Coupa Supplier Portal (CSP)! The CSP is a free tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy. Depending on your customer's specific Coupa configuration, you can manage content and settings on a customer-by-customer basis, including viewing purchase orders, setting up delivery methods, creating catalogs, sending invoices and advance ship notices (ASNs), checking the status of transactions, and more.' Below this, it states 'The CSP user guide is available as a pdf in the following languages:' and lists links for English, French, Portuguese (Brazil), and Spanish. At the bottom, there is a blue button that says 'CLICK TO WATCH VIDEO: Coupa Supplier Portal Introduction'.

Coupa Registration



Coupa Supplier Portal – Registration

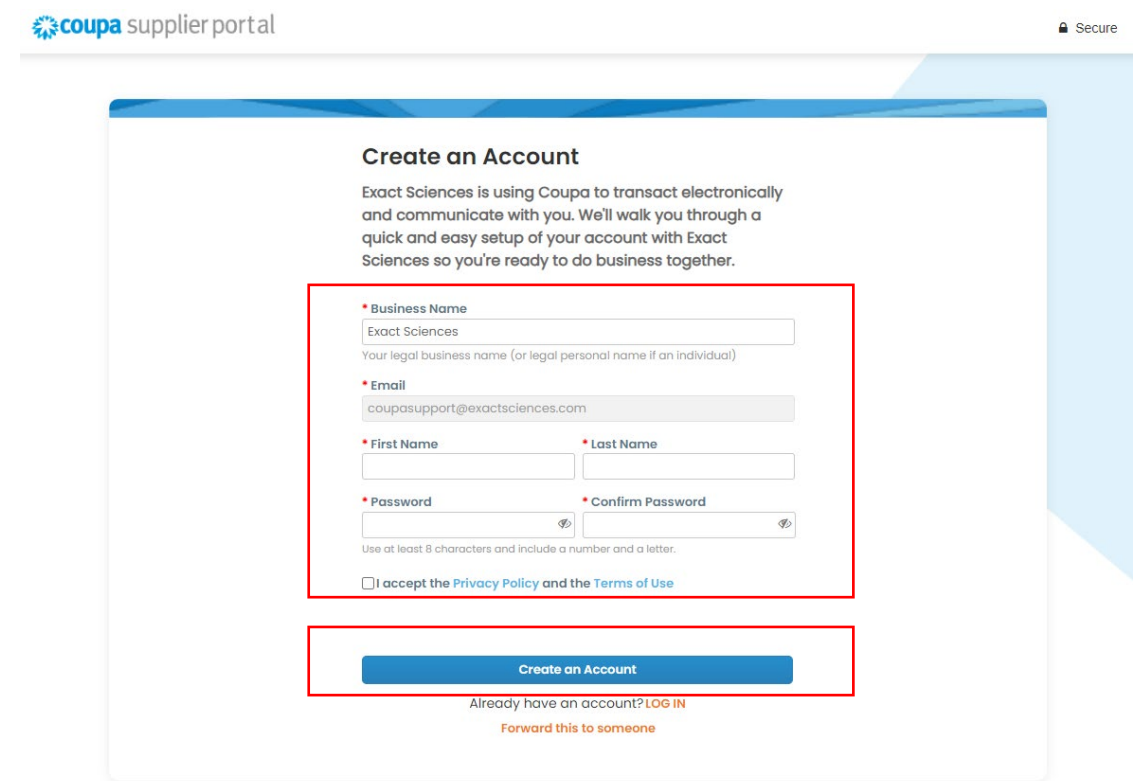
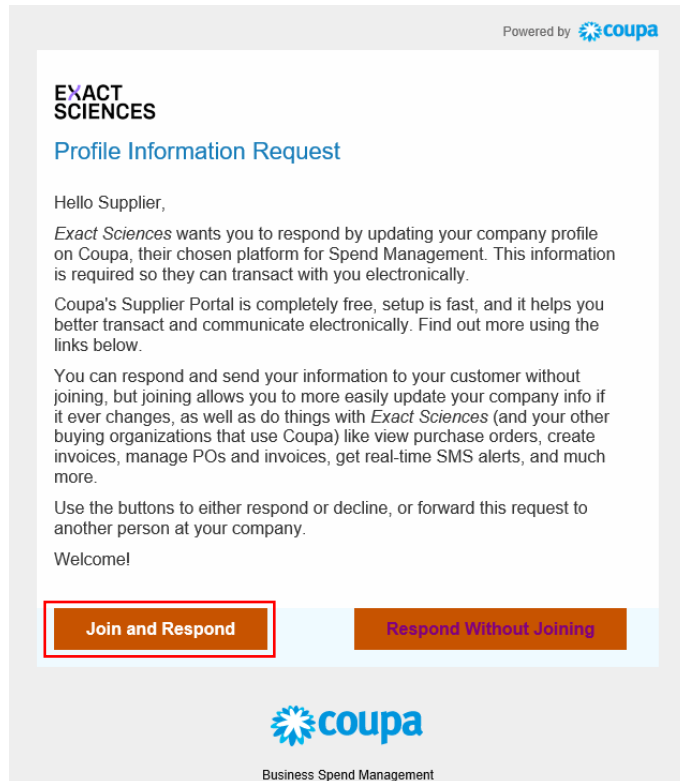
First-time registrants will receive an email from Exact Sciences. To continue registration, click the link at the bottom of the email. Perform the following steps as a supplier to register yourself within CSP:

To start the registration process, follow the below instructions:

- Confirm that your business name is your legal business name (or legal personal name if an individual)
- Click the "Submit" button.

Forward your invitation:

If you are not the correct person to complete this for your company, you can forward the invite to a colleague by clicking "Forward this to someone" and entering their email.




Coupa Supplier Portal – Registration

New users should complete the welcome tour created by Coupa.

The screenshot shows a blue-themed welcome screen for the Coupa Supplier Portal. At the top, a header bar contains the text "Welcome to Coupa Supplier Portal" and a close button (X). Below the header, there are six light blue rectangular buttons arranged in two columns, each with a white checkmark icon and text describing a feature: "Create Invoices & Get Status Updates", "Update Profile & Payment Info", "View & Respond to Purchase Orders", "Create Time Sheets & ASNs Against Orders", "Host & Manage Catalogs", and "Get Real-Time SMS & Email Notifications". At the bottom of the screen, there is a "Skip" button on the left, a "Next" button on the right, and a progress indicator consisting of four dots, with the first dot being filled blue.

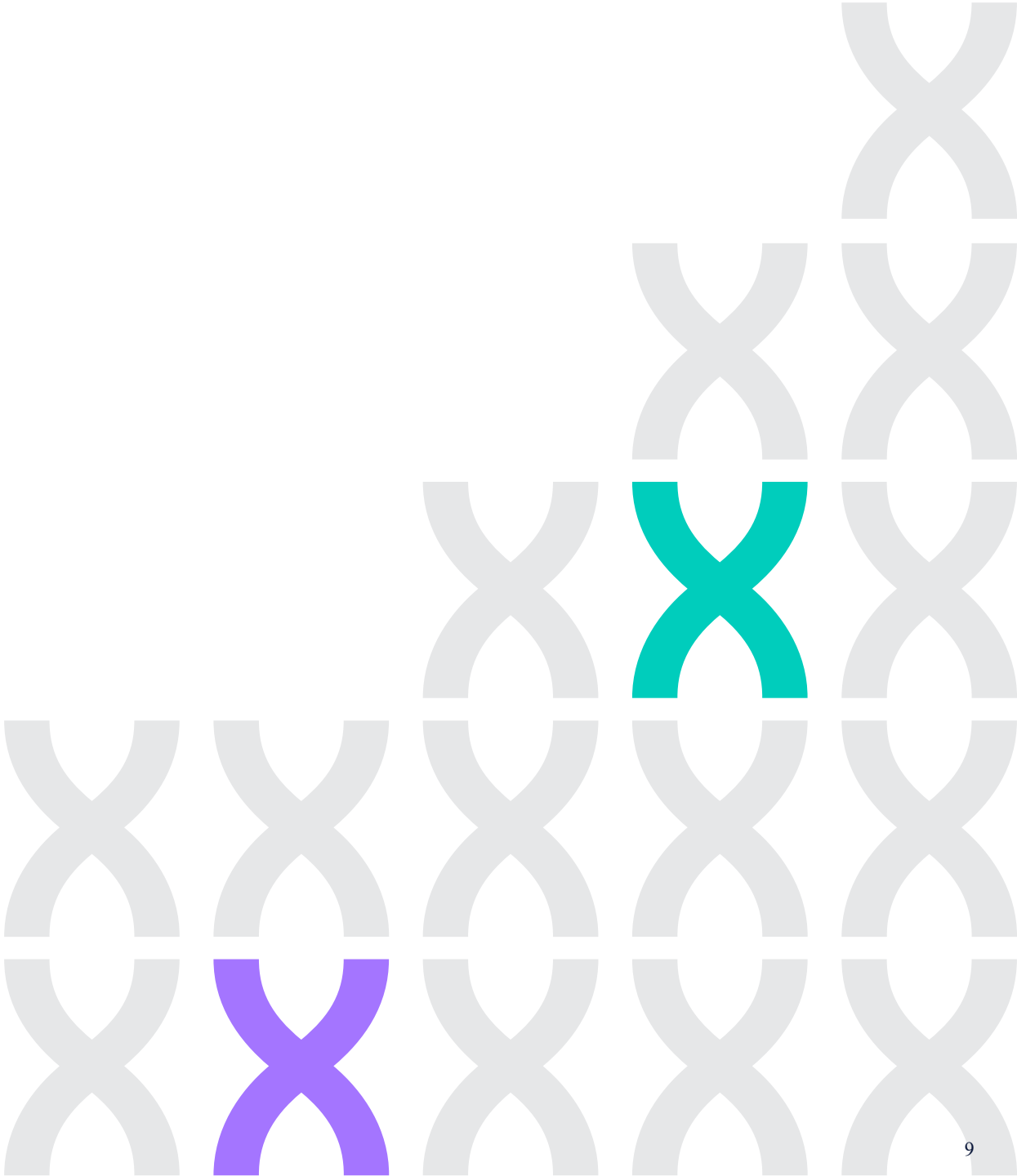
Welcome to Coupa Supplier Portal

- ✓ Create Invoices & Get Status Updates
- ✓ Update Profile & Payment Info
- ✓ View & Respond to Purchase Orders
- ✓ Create Time Sheets & ASNs Against Orders
- ✓ Host & Manage Catalogs
- ✓ Get Real-Time SMS & Email Notifications

 **coupa** supplier portal

Skip ● ○ ○ ○ Next

Create Legal Entity



Coupa Supplier Portal – Create Legal Entity

To manage a legal entity as a supplier, perform the following steps:

- Click on the **Setup** tab at the top of the page.
- Click on the **Admin** tab underneath.
- Click on the **Legal Entity Setup** button on the upper right side of the page.
- Click the **Add Legal Entity** button to create a new legal entity.

The screenshot displays the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'EXACT SCIENCES' with a dropdown arrow, 'NOTIFICATIONS 1', and 'HELP' with a dropdown arrow are on the right. Below this is a blue navigation bar with tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Underneath, there are 'Sourcing' and 'Add-ons' tabs, and a 'Setup' button highlighted with a red box. Below the navigation bar, there are 'Admin' and 'Customer Setup' tabs. The main content area is titled 'Admin Legal Entity Setup'. On the right side of this area, there is an 'Add Legal Entity' button highlighted with a red box. On the left side, there is a sidebar menu with items: Users, Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup (highlighted with a red box), Fiscal Representatives, Remit-To, and Early Pay Discounts. At the bottom of the main content area, there is a navigation bar with '← Previous 1 2 Next →'.

Coupa Supplier Portal – Create Legal Entity

After clicking the Add Legal Entity button, you will be required to add further details as follows:

- Under the **Where is your Business Located?** section enter the relevant details and click **Continue**.

Where's your business located? ×

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Coupa Supplier Portal – Create Legal Entity

- After you click continue, enter the relevant details under the following sections:
 - Which Customers do you want to see this?
 - What address do you invoice from?
 - What is your Tax ID?
 - Miscellaneous
- Click **Save & Continue** to proceed.

Tell your customers about your organization

Which customers do you want to see this?

All

What address do you invoice from?

* Address Line 1

* City

State

* Postal Code

Country/Region

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

Country/Region

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

Coupa Supplier Portal – Create Legal Entity

- Under the **Where do you want to receive the payment?** section, select the relevant Payment Type from the drop-down menu.
- Click **Save & Continue** to proceed.

Where do you want to receive payment? ×

1 2 3 4

* Payment Type Address ▼

What is your Remit-To Address?

Address Line 1

City

State

Postal Code

Country/Region United States

Cancel **Save & Continue**

Coupa Supplier Portal – Create Legal Entity

- Under the **Where do you want to receive the payment?** section, review the relevant Remit-To address details.
- To change the existing Remit-To address, click the **Add Remit-To** button.
- Click **Next** to proceed.

✕

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.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	123 Website Example Rd Madison WI 00000 United States	Active	Manage

Deactivate Legal Entity
Cancel
Next

Coupa Supplier Portal – Create Legal Entity

- Under the **Where do you ship goods from?** section, review the relevant shipping address details.
- To change the existing shipping address, click the **Add Ship From** button.
- Click **Done**.

You have successfully created a new Legal Entity.

×

Where do you ship goods from?

1 2 3 4

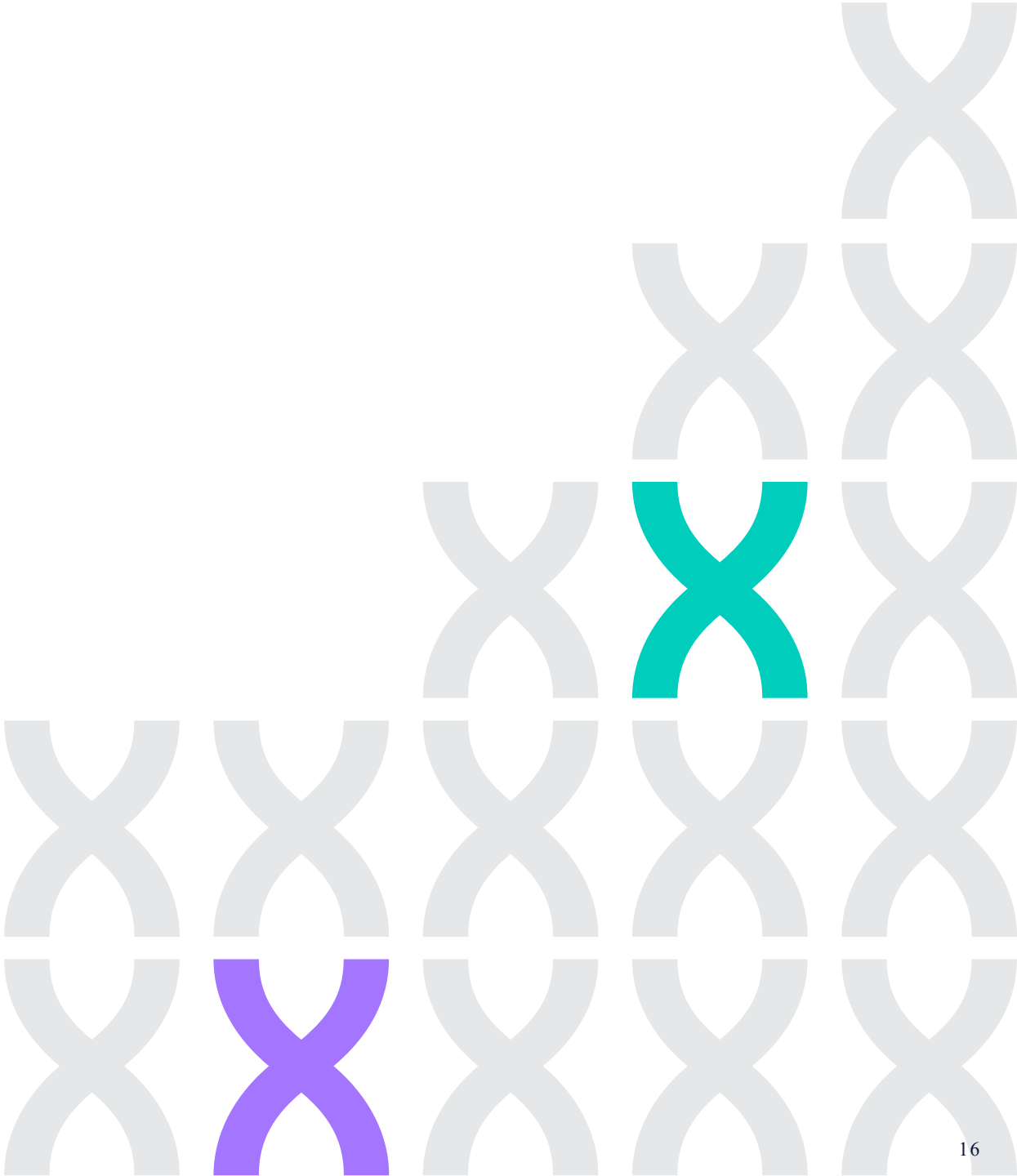
For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
123 Website Example Rd Madison WI 00000 United States	Active	Manage

Deactivate Legal Entity
Done

Purchase Orders



Coupa Supplier Portal – Purchase Order Notifications

After a Purchase Order has been created, the supplier is notified about the PO creation via an E-mail notification and CSP notification.

- Email Notification
- To access your CSP notification, click the **Notifications** icon on your CSP homepage.

EXACT
SCIENCES

Exact Sciences Purchase Order #ES00000485

Order Summary

Date 04/11/24

PO Total 9,000.00 USD

Shipping Terms DPU

Payment Terms NT90

Contact Pearl Lui
dummy.plui@exactsciences.com

Manage Order Create Invoice

coupa supplier portal

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Payments

Sourcing Add-ons Setup

NOTIFICATIONS 1 HELP

A new order is received
New PO ES00000485 for \$9,000.00 issued by Exact Sciences.

See All Notifications

Coupa Supplier Portal – Manage Purchase Orders

To access your Purchase Orders within CSP, perform the following steps:

- Click the **Orders** tab on your CSP homepage.
- Select the relevant Customer from the **Select Customer** dropdown menu.
- Under the **Purchase Orders** section, you can view all the PO's received.
- Click the relevant **PO Number** to view the PO details.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the 'Orders' tab highlighted. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'Exact Sciences' selected. The main content area is titled 'Purchase Orders' and includes a section for 'Instructions From Customer'. Below this, there is a table of Purchase Orders with columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row in the table is highlighted with a red box, showing a PO Number of ES00000485.

coupa supplier portal | NOTIFICATIONS 1 | HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogs Payments Business Performance Sourcing

Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer Exact Sciences

Purchase Orders

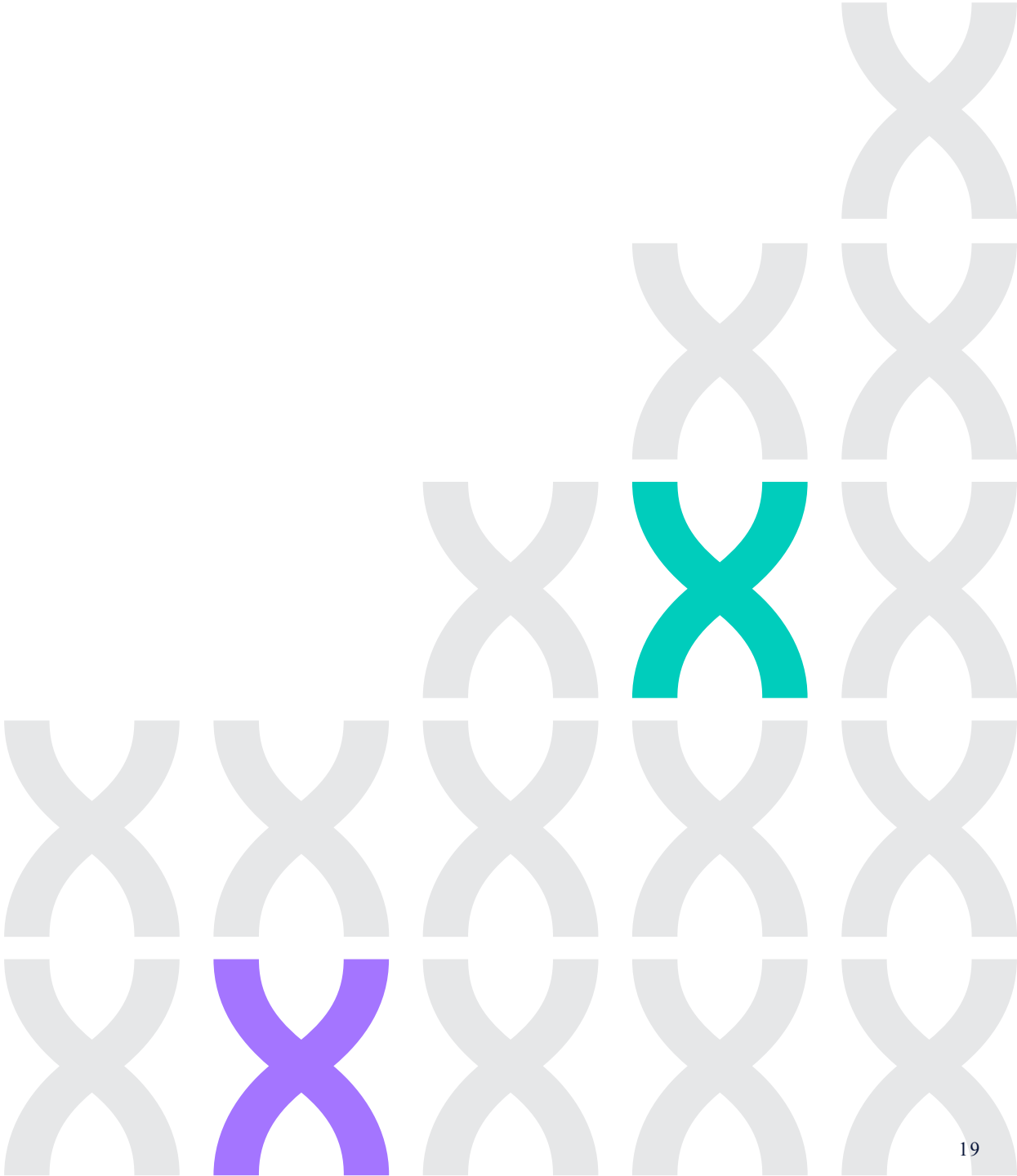
Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ES00000485	04/11/24	Issued	None	100 each	No	9,000.00 USD		

In voicing



Coupa Supplier Portal – Create an invoice

After a Purchase Order has been received, the supplier needs to create an invoice. Perform the following steps to create an invoice:

- Click the **Orders** tab on the Coupa homepage.
- Select the relevant customer from the **Select Customer** dropdown menu.
- Generate an invoice from this page by clicking on the gold stack of coins or the **PO Number**.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'NOTIFICATIONS 1' and 'HELP' are on the right. A blue navigation bar contains the following tabs: Home, Profile, Forecasts, **Orders** (highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, and Sourcing. Below this, there are 'Add-ons' and 'Setup' options. A secondary navigation bar includes: Orders (highlighted), Order Lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Shipments. On the right side, there is a 'Select Customer' dropdown menu with 'Exact Sciences' selected (highlighted with a red box). Below the navigation is the heading 'Purchase Orders' and a section titled 'Instructions From Customer' with a text box containing: 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. At the bottom, a table of purchase orders is displayed (highlighted with a red box). The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row is highlighted with a blue background and has its 'PO Number' 'ES00000485' and 'Actions' icon (gold stack of coins) highlighted with red boxes.


PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ES00000485	04/11/24	Issued	None	100 each	No	9,000.00 USD		


Coupa Supplier Portal – Create an invoice


After clicking the Create Invoice button, you will be redirected to the **Create Invoice** page.

- All fields marked with an * are mandatory.
 - “Invoice #” requires each vendor to generate a unique invoice number for Coupa submission.
 - The “Invoice Date” defaults to today’s date. As needed, it should be adjusted to match the milestone completion date, goods shipment date, or service delivery date.
 - “Currency” must match the currency of the PO. If it does not align with your agreement, contact coupasupport@exactsciences.com.


Create Invoice Create

 General Info

* Invoice # 

* Invoice Date 

Payment Term

* Currency 


Delivery Number

Status

Shipping Term

Image Scan No file chosen

Supplier Note

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

Coupa Supplier Portal – Create an invoice

The **Choose Invoicing Details** section will appear if you have not established a Legal Entity.

- Choose your Legal Entity name from the dropdown menu.
- Vendors with multiple **Remit-To** options must select the appropriate one before entering invoice details. Omitting will result in submission failure, which will reset your invoice entry form to blank.

Choose Invoicing Details ✕

* Legal Entity + Add New

Invoice From

* Remit-To + Add New

* Ship From Address + Add New

Cancel
Save

📍 From

* Supplier Test

Supplier Tax ID

* Invoice From Address EXACT 🔍

United States

* Remit-To Address EXACT 🔍

United States

* Ship From Address EXACT 🔍

United States

Coupa Supplier Portal – Create an invoice

Fill out fields: Description, QTY, Unit of Measure (UOM), Price, Additional Costs. To delete a purchase order line or when invoicing against a purchase order with multiple lines, click the red "X" next to the unused line.

Note: For partial invoicing, please update the quantity or amount on the invoice (for service-based purchase orders).

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	<input type="text"/>	100.000	each	90.00	9,000.00 ✖

PO Line
ES00000485-1

Supplier Part Number

Service/Time Sheet Line
None

Start Date
mm/dd/yy

Contract

End Date
mm/dd/yy

Credit Line
None

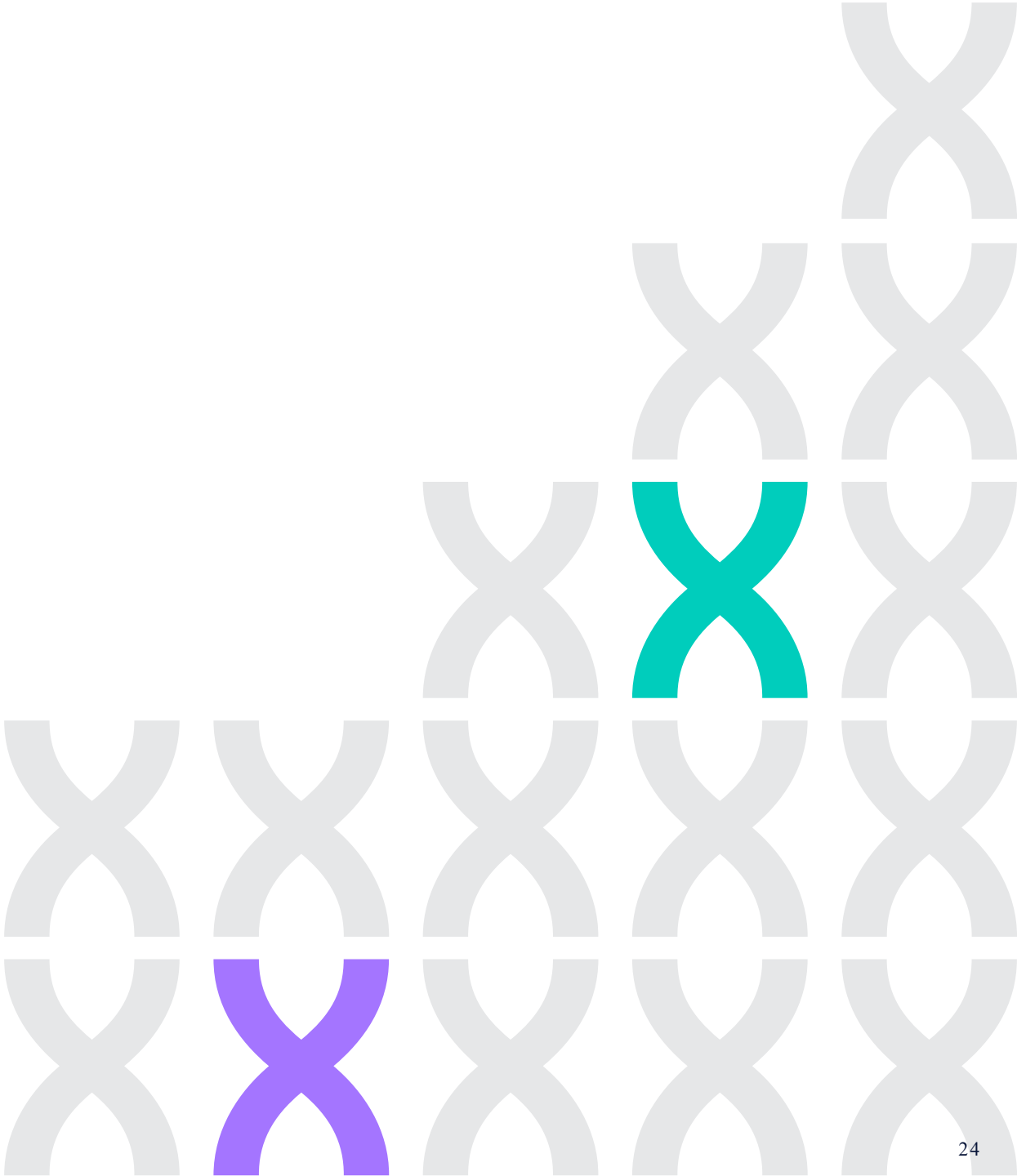
For Canada, please select the following tax rates
1. 14.98% - Select Canada GST and then 14.98% from tax rates

Billing

Totals & Taxes

Lines Net Total	9,000.00
Shipping	<input type="text" value="30"/>
Tax	<input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description"/>
Handling	<input type="text"/>
Tax	<input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description"/>
Tax	<input type="text" value="0.000"/>
Total Tax	0.00
Net Total	9,030.00
Total	9,030.00

Credit Notes



Coupa Supplier Portal - Create a Credit Note

Navigate to the Invoices tab, scroll to the Create Invoices section, and click "Create Credit Note."

- Click "Resolve issue for invoice number," for a dropdown of all relevant invoices. Select the invoice to apply the credit note.
- Determine if the credit memo covers the total amount or a partial amount of the invoice.
- Coupa will guide you to the Credit Notes page where you should enter the credit number (invoice number.) If you have a PDF credit note, attach it to the credit note.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with tabs: Home, Profile, Forecasts, **Orders** (highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, and Sourcing. Below this is a sub-navigation bar with tabs: Orders (highlighted), Order Lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Shipments. On the right side, there is a 'Select Customer' dropdown menu with 'Exact Sciences' selected (highlighted with a red box). The main content area is titled 'Purchase Orders' and includes a section for 'Instructions From Customer' with a text box containing: '{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}'. Below this is a button that says 'Click the 📄 Action to Accept the Purchase Order and Create an Invoice using its data'. At the bottom, there is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains one row with the following data: PO Number: ES00000517, Order Date: 04/15/24, Status: Issued, Acknowledged At: None, Unanswered Comments: No, Total: 90,000.00 USD, and Actions: 📄 📄 📄 (highlighted with a red box).

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ES00000517	04/15/24	Issued	None		No	90,000.00 USD		📄 📄 📄

Thank You

