
Copyright © 2018 Coupa Software, Inc. All rights reserved.

Coupa reserves the right to make changes to this document and to its services. All trademarks are the property of their respective owners.
## Table of Contents

### Get Started with the CSP
- Changes in the CSP Documentation  5
- Register for the CSP  6
- Create Your Account  7
- Log in to the CSP  9
- Create Custom Views  11
- Create or Update Your Profiles  14
- Enable or Disable Two-Factor Authentication  17
- Manage Your Account  22
- Navigate and Get Help  26
- View and Manage Notifications  28

### Work with the CSP
- Configure Punchouts  33
- Configure the PO Delivery Method  35
- Create an Invoice from a PO  36
- Create a Credit Note  37
- Create or Edit an Invoice  39
- Create or Edit a Catalog  41
- Create or Edit a Service (Time) Sheet  44
- Create or Edit Catalog Items  48
- Create or Update an ASN  51
- View and Manage ASNs  55
- View and Manage Catalogs  56
- View and Manage Invoices  58
- View and Manage POs  60
- View and Manage Service (Time) Sheets  63
- View PO Lines  67

### Administer the CSP
- Admin Page  68
- Manage Users  69
- Manage Merge Requests  70
- Set up E-Invoicing  73
- Add Fiscal Representatives  76
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 or get an invitation email from your Coupa customer.

**Create Your Account**
Once you've requested 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/timesheets, 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 2018 Release

<table>
<thead>
<tr>
<th>Topic</th>
<th>Change</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">Enable or Disable Two-Factor Authentication</a> and <a href="#">Log in to the CSP</a></td>
<td>Updated</td>
<td>Updated with instructions on how to use SMS messaging to validate your credentials when prompted by two-factor authentication.</td>
</tr>
<tr>
<td>View and Manage Notifications</td>
<td>Updated</td>
<td>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.</td>
</tr>
<tr>
<td>Set Coupa Accelerate Preferences</td>
<td>Updated</td>
<td>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.</td>
</tr>
<tr>
<td>View and Manage Invoices</td>
<td>Updated</td>
<td>Updated with information on resolving disputed invoices.</td>
</tr>
<tr>
<td>Create a Credit Note</td>
<td>New</td>
<td>Added instructions on when and how to create a credit note.</td>
</tr>
</tbody>
</table>
Register for the CSP

You have the following options to register for the CSP:

<table>
<thead>
<tr>
<th>Method</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer-created invitation</td>
<td>When you accept the invitation and create your account, you are automatically connected/linked to the customer who invited you.</td>
<td>You have to wait for your customer to send the invitation email.</td>
</tr>
<tr>
<td>Self-created invitation</td>
<td>You can get started right away and update your profile more quickly.</td>
<td>You need to connect manually to your customers in Coupa. Let your customer know that you registered and you want to connect with them.</td>
</tr>
</tbody>
</table>

With both 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 can't 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.

In both cases, you receive an email with a link to validate your information and create your account.
Thank you for requesting an invitation to the Coupa Supplier Portal. Your request has been accepted, please click the link below to create your account.

https://supplier.coupahost.com

Once you are registered you can:

- Give your company visibility to all Coupa customers
- Manage your company information
- Configure your PO transmission preferences
- Create an online catalog
- View purchase orders
- Create electronic invoices

By participating, suppliers gain access to a low cost, high volume order channel. They increase their order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with their key customers. Plus, they open themselves up to potential new customers and increased sales.

You can also find more information here:

Overview: https://success.coupa.com?id=introducing-supplierportal

Getting started guide: https://success.coupa.com?id=supplier-getting-started

By using this site, you agree to the Coupa Terms & Conditions which can be accessed here.

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

Welcome to the Coupa Supplier Portal
Please validate the information below and create the password for your account.

* 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.

I'm not a robot

Submit

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*First Name</td>
<td>Your personal first name to be applied to your personal account.</td>
</tr>
<tr>
<td>*Last Name</td>
<td>Your personal last name to be applied to your personal account.</td>
</tr>
<tr>
<td>*Company</td>
<td>The name of your company as seen on your company's public profile.</td>
</tr>
<tr>
<td>*Email</td>
<td>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 to use this email, create two company accounts and merge them. For more info, see <a href="#">Manage Merge Requests</a>.</td>
</tr>
</tbody>
</table>
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. See Administrate the CSP for more info.
Log in to the CSP

Go to supplier.coupahost.com and in the Log In pane on the right, enter your email address and password and click Log In.

Once you are signed in, Coupa takes you on a tour of the new site.

When you log in for the first time, you are prompted to enable two-factor authentication. See Enable or Disable Two-Factor Authentication for more info.
Two-Factor Authentication

Enable Two-Factor Authentication

No Thanks
Enable

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.

Two-Factor Authentication

Enter validation code that we sent to +12015555555

* Two Factor Code

[ ] Remember this computer for 30 days

Cancel  Send Code to Mobile  Log In

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.

See [Enable or Disable Two-Factor Authentication](#) for more info.

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.
Create New data table view

General

Name
Visibility
- Only Me
- Everyone
Start with view

Conditions

Apply

of these conditions:

Invoice #

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
Disputed Date  |  Comments
Document Type  |  Actions
Invoice Date  |  
Lookup Custom Field  |  
Original Invoice Date  |  
Original Invoice Number  |  
Paid  |  
Payment Information  |  
Payment Term  |  

Default Sort Order

Sort by
in ascending order

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.

<table>
<thead>
<tr>
<th>Group</th>
<th>Setting</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Name</td>
<td>Name of the custom view, visible from the <strong>View</strong> drop-down list at the top of the table.</td>
</tr>
<tr>
<td></td>
<td>Visibility</td>
<td>Defines whether this view can be visible to only you or all the other users that can see the main table.</td>
</tr>
<tr>
<td></td>
<td>Start with view</td>
<td>Use this option to load the settings from another view, and then modify those settings to fit your needs for this view.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Apply</td>
<td>All - Displays results only for objects that meet all of the conditions you add in this list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Any - Displays results for objects that meet at least one of the conditions you add in this list.</td>
</tr>
<tr>
<td></td>
<td>Conditions</td>
<td>Create conditions based on the data available in the CSP.</td>
</tr>
<tr>
<td>Columns</td>
<td>Available columns</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Selected columns</td>
<td>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.</td>
</tr>
<tr>
<td>Default Sort Order</td>
<td>Choose the column by which you want results to be sorted and define whether to sort them in ascending or descending order.</td>
<td></td>
</tr>
</tbody>
</table>

4. **Save** your settings.
Create or Update Your Profiles

In 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 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.

Any company using Coupa can find and connect with you through your public profile.

Coupa Software

About
Value as a Service

Industry
Software

Website
http://www.coupa.com

Established
2006

Employees
500-1999

Improve Your Profile

About
Ensure Customer Success, Focus on Results, and Strive for Excellence

Public Profile

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/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.
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

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.

![Profile copy and edit interface]

**Note:** You can't change your company address from a customer-specific profile page. Return to your public profile to change it.

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 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.

---

**My Account Security & Two-Factor Authentication**

**Mobile Phone Verification**

- **Mobile Phone:** Unverified
  - Phone: +1 301-555-5555
  - This phone will receive SMS Notifications

**Two-Factor Authentication**

- **SMS:** Unclaimed
  - Verify your mobile phone to receive verification codes by text message

- **Two Factor Authenticator App:** Disabled

---

**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.
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

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.

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.

See Install Google Authenticator for more info.

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 your 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.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*First name</td>
<td>This is your personal first name.</td>
</tr>
<tr>
<td>*Last name</td>
<td>This is your personal last name.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>*Email</td>
<td>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. See Manage Users for more information.</td>
</tr>
<tr>
<td>Current Password</td>
<td>Your current password.</td>
</tr>
<tr>
<td>Password</td>
<td>Use this field to change your password. It must be at least 8 characters long and it must include a number and a letter.</td>
</tr>
<tr>
<td>Password Confirmation</td>
<td>This field needs to match the password that you typed in the Password field.</td>
</tr>
<tr>
<td>Upload your photo</td>
<td>You can add a personal photo in .jpg, .png, or .gif format.</td>
</tr>
</tbody>
</table>

Click on the Notification Preferences link to set or modify your notification preferences. See View and Manage Notifications for more info.

Click on the Security & Two-Factor Authentication link to enable/disable two-factor authentication. See Enable or Disable Two-Factor Authentication for more info.
Navigate and Get Help

Help
When you log in for the first time, you are greeted by the Help 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.

**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.

**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.

My Notifications

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 right corner. Or click on your name link and on the Notification Preferences link.
You can access the notification preferences also from your Account Settings. See Manage Your Account for more info.

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. See Enable or Disable Two-Factor Authentication for more info.

SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Catalogs</strong></td>
<td></td>
</tr>
<tr>
<td>A new comment is received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>A catalog is approved</td>
<td>Disabled by default.</td>
</tr>
<tr>
<td>A catalog is rejected</td>
<td>Disabled by default.</td>
</tr>
<tr>
<td>A catalog is about to expire</td>
<td>Disabled by default.</td>
</tr>
<tr>
<td><strong>Form Responses</strong></td>
<td></td>
</tr>
<tr>
<td>A form response is approved</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>A form response is rejected</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>Supplier information is updated</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>A new comment is received</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Invoices</strong></td>
<td></td>
</tr>
<tr>
<td>A new comment is received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>An invoice is approved</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>An invoice is paid</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td><strong>Orders</strong></td>
<td></td>
</tr>
<tr>
<td>A new comment is received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>A new order is received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td><strong>Profile</strong></td>
<td></td>
</tr>
<tr>
<td>Public profile is updated</td>
<td>Disabled by default.</td>
</tr>
<tr>
<td>An information update request is received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td><strong>Terms of Use</strong></td>
<td></td>
</tr>
<tr>
<td>New Terms of Use are received</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td><strong>Users</strong></td>
<td></td>
</tr>
<tr>
<td>A new customer connection is created</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td><strong>Service/Time Sheets</strong></td>
<td></td>
</tr>
<tr>
<td>A Service/Time Sheet is approved</td>
<td>Enabled by default: Online and Email</td>
</tr>
<tr>
<td>A Service/Time Sheet is rejected</td>
<td>Enabled by default: Online and Email</td>
</tr>
</tbody>
</table>

You also receive notifications displayed in a green bar following certain actions, for example:

![Catalog is being deleted](image-url)
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 the Configure Punchout button.

**Configure the PO Delivery Method**
Select how you want to receive POs on the Purchase Orders page and clicking Configure PO Delivery for the customer whose settings you want to modify.

**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 Catalog tab 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.
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.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the punchout, as it appears to users within Coupa.</td>
</tr>
<tr>
<td>URL</td>
<td>The full punchout URL required to receive purchase orders in Coupa.</td>
</tr>
<tr>
<td>Buyer Identity</td>
<td>Your customer's DUNS or NetworkID.</td>
</tr>
<tr>
<td>Buyer Domain</td>
<td>Part of the From section of the header in the OrderRequest cXML. It can be anything you define, but it is usually DUNS or NetworkID, depending on the corresponding identity value.</td>
</tr>
<tr>
<td>Supplier Identity</td>
<td>Your DUNS or NetworkID.</td>
</tr>
<tr>
<td>Supplier Domain</td>
<td>Part of the To section of the header in the OrderRequest cXML. It can be anything you define, but it is usually DUNS or NetworkID, depending on the corresponding identity value.</td>
</tr>
<tr>
<td>Shared Secret</td>
<td>A password that you and your customer agreed upon. If no shared password is specified, Coupa automatically passes none.</td>
</tr>
<tr>
<td>Protocol</td>
<td>This field should always be cxml.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order Method</td>
<td>Choose how to receive POs from your customer:</td>
</tr>
<tr>
<td></td>
<td>• Email: Coupa automatically emails POs to the email address you enter.</td>
</tr>
<tr>
<td></td>
<td>• cXML: Coupa sends the PO via cXML. You have to enter the cXML settings</td>
</tr>
<tr>
<td></td>
<td>to use this option.</td>
</tr>
<tr>
<td></td>
<td>Note: If you want to use a method not listed here, talk to your customer</td>
</tr>
<tr>
<td></td>
<td>about alternatives.</td>
</tr>
<tr>
<td>PO Email</td>
<td>This field is required for receiving POs via email. Coupa sends POs to this</td>
</tr>
<tr>
<td></td>
<td>email address. To specify multiple addresses, separate them with a comma.</td>
</tr>
<tr>
<td>cXML URL</td>
<td>The full PO routing URL to receive POs.</td>
</tr>
<tr>
<td>cXML Domain</td>
<td>Part of the From section of the header in the OrderRequest cXML. It can be</td>
</tr>
<tr>
<td></td>
<td>anything you define, but it's usually DUNS or NetworkID, depending on</td>
</tr>
<tr>
<td></td>
<td>the corresponding identity value.</td>
</tr>
<tr>
<td>cXML Identity</td>
<td>Your customer's DUNS or NetworkID.</td>
</tr>
<tr>
<td>cXML Supplier Domain</td>
<td>Part of the To section of the header in the OrderRequest cXML. It can be</td>
</tr>
<tr>
<td></td>
<td>anything you define, but it's usually DUNS or NetworkID, depending on</td>
</tr>
<tr>
<td></td>
<td>the corresponding identity value.</td>
</tr>
<tr>
<td>cXML Supplier Identity</td>
<td>Your DUNS or NetworkID.</td>
</tr>
<tr>
<td>cXML Secret</td>
<td>A password that you and the customer agreed upon. If no shared password is</td>
</tr>
<tr>
<td></td>
<td>specified, Coupa automatically passes none.</td>
</tr>
<tr>
<td>cXML Protocol</td>
<td>This field should always be cxml.</td>
</tr>
</tbody>
</table>

Valid until May 31, 2018
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

In the appearing window, choose the Invoice from address. The most recently used address is at the top of the list.
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. See Create or Edit an Invoice for more info.

Similarly to creating an invoice, you can create a credit note by clicking on the Create Credit Note ((Messages) 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. See Create or Update an ASN for more info.

**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. See Create or Edit a Service (Time) Sheet for more info.

**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. See [Disputed invoices](#) for more info.
- Record miscellaneous credit, for example, return/cancelation of goods, price adjustments, rebates and refunds.

To create a credit note, click on the **Credit note** button under the **Invoices** table.

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)

---

**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
- Adjust invoice with a credit note

---

You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it. See [Disputed invoices](#) for more info.

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 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 for **Create or Edit an Invoice**.
Create or Edit an Invoice

To create an invoice from a PO, see Create an Invoice from a PO.

To create an invoice without a contract or against a contract, select the relevant radio button (No contract or Invoice Against Contract) under the Invoices table and click Create. When creating an invoice against a contract, you must first select the contract from the drop-down list.

Use the Credit Note button to create a credit note. See Create a Credit Note for more info.

![Invoice Options](image)

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.

In the appearing window, choose the Invoice from address. The most recently used address is at the top of the list.

![Invoice From Address](image)

On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk). You have to select an invoice from, a remit-to, and a ship from address by clicking on the icon next to the address field.
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 I'vecode 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.
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 (add) icon next to it.

Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.

Submit the invoice or save it as a draft to submit it later. You can also add comments for your customer.

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.
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 **Item(s) Changed** section provides information on changes that your customer made to the catalog:

<table>
<thead>
<tr>
<th>Item Changes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>n Items Changed (n Unchanged)</td>
<td>Total number of items that changed and did not change.</td>
</tr>
<tr>
<td>Price Increase</td>
<td>Total number of items in the catalog that increased in price. New items don't appear in this count.</td>
</tr>
</tbody>
</table>
### Item Changes

<table>
<thead>
<tr>
<th>Item Changes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Decrease</td>
<td>Total number of items in the catalog that decreased in price. New items don't appear in this count.</td>
</tr>
<tr>
<td>Other Fields Updated</td>
<td>Total number of items that were modified in a way other than a change in price.</td>
</tr>
<tr>
<td>New Items</td>
<td>Total number of new items included in the catalog since the last upload or creation of new items.</td>
</tr>
<tr>
<td>Deactivated Items</td>
<td>Total number of items that are no longer available in the catalog or search within Coupa.</td>
</tr>
</tbody>
</table>

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're 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.

<table>
<thead>
<tr>
<th>Status Change</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>The item is new, and has not been offered to this customer before. If the item is listed in <strong>Items Offered to [Customer Name]</strong>, make sure the part number is correct since this is the unique identifier.</td>
</tr>
<tr>
<td>Updated</td>
<td>The item has been updated and something has changed.</td>
</tr>
<tr>
<td>Deactivated</td>
<td>The item is no longer available for purchase.</td>
</tr>
</tbody>
</table>

### 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]** can't be deleted. Once an item is accepted and published, it can't 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. See [Create Custom Views](#) for more info.
Create or Edit a Service (Time) Sheet
You can create a service/time sheet from a PO. See View and Manage POs for more info.

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.
   - Click on the Edit (📝) icon for it in the Actions column and click on the Edit button.

Service/Time Sheets #352  Purchase Order #3434

<table>
<thead>
<tr>
<th>Description</th>
<th>Notes</th>
<th>Sun 7</th>
<th>Mon 8</th>
<th>Tue 9</th>
<th>Wed 10</th>
<th>Thu 11</th>
<th>Fri 12</th>
<th>Sat 13</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repair Service</td>
<td></td>
<td>0.0</td>
<td>7.0</td>
<td>8.0</td>
<td>5.0</td>
<td>0.3</td>
<td>0.0</td>
<td>0.0</td>
<td>20</td>
</tr>
</tbody>
</table>

Attachments
Add File | URL | Text

- Total hours: 20

2. Confirm or enter time 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 happens on the entire PO, not individual lines.

If the service/time sheet is 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 is rejected, you receive a notification and you have to submit the service/time sheet again.
The type of notification depends on your notification preference settings.
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/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.

On the Catalog Item Create page, fill in at least the mandatory fields (marked with a red asterisk).

<table>
<thead>
<tr>
<th>Setting on UI</th>
<th>Column in the CSV Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Name</em></td>
<td>Name*</td>
<td>The item name that Coupa displays in search results.</td>
</tr>
<tr>
<td><em>Description</em></td>
<td>Description*</td>
<td>The item description that Coupa displays in search results. Coupa also searches this description for any of the keywords searched for.</td>
</tr>
<tr>
<td><em>Unit of Measure</em></td>
<td>UoM Code*</td>
<td>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.</td>
</tr>
<tr>
<td>Purchasable</td>
<td>Active*</td>
<td>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 &quot;Active&quot; is &quot;Yes&quot;, the item can be purchased. If &quot;No&quot;, the item can't be purchased.</td>
</tr>
</tbody>
</table>

Supplier Item Attributes
<table>
<thead>
<tr>
<th>Setting on UI</th>
<th>Column in the CSV Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Part Number</td>
<td>Supplier Part Num*</td>
<td>The unique identifier for the item in the catalog database. Usually the supplier part number. It may be different from the Manufacturer part number.</td>
</tr>
<tr>
<td>Auxiliary Part Number</td>
<td>Supplier Aux Part Num</td>
<td>Another part number that helps identify the item, for example, a quote number. It will be included in any purchase order.</td>
</tr>
<tr>
<td>Manufacturer</td>
<td></td>
<td>The name of the item's manufacturer.</td>
</tr>
<tr>
<td>Lead Time</td>
<td>Lead Time</td>
<td>The time between when you receive the purchase order and when you ship the item. Enter a single value not a range.</td>
</tr>
<tr>
<td>UNSPSC Code</td>
<td>UNSPSC Code</td>
<td>This is the United Nations Standard Products and Services Code® (UNSPSC®). For more info, see <a href="http://www.unspsc.org">www.unspsc.org</a>. 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.</td>
</tr>
<tr>
<td>Contract</td>
<td></td>
<td>You can specify the customer contract (if any) associated with the item.</td>
</tr>
<tr>
<td>Pricing Type</td>
<td></td>
<td>Limited to Fixed Price.</td>
</tr>
<tr>
<td>*Price</td>
<td>Price*</td>
<td>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.</td>
</tr>
<tr>
<td>*Currency</td>
<td>Currency*</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use ISO Currency Codes, for example, USD.</td>
</tr>
<tr>
<td>Savings %</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Setting on UI</td>
<td>Column in the CSV Template</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Browse</td>
<td>Image URL</td>
<td>You can also upload an image for your item by clicking <strong>Browse</strong>. 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).</td>
</tr>
<tr>
<td></td>
<td>Pack Quantity</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Upload/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 an **/* are mandatory.
3. **Load the updated file**
   - **Browse...** No file selected.
   - **Note:** If you are loading csv files with non-English characters, please consult the following help note.

- To get a blank CSV file to build your new catalog, click on the **CSV template** link. For info on the fields to be filled in, see the table in Create or Edit Catalog Items.
- 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.

<table>
<thead>
<tr>
<th>Supplier Part Num*</th>
<th>4.05001E+12</th>
<th>4.05001E+12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Aux Part Num</td>
<td>415971</td>
<td>465333</td>
</tr>
<tr>
<td>Name*</td>
<td>CASE CARAMILK EGG 34G BULK CAN</td>
<td>CASE KING SIZE CARAMILK</td>
</tr>
<tr>
<td>Description*</td>
<td>CASE CARAMILK EGG 34G BULK CAN</td>
<td>CASE KING SIZE CARAMILK</td>
</tr>
<tr>
<td>Price*</td>
<td>611.88</td>
<td>826.43</td>
</tr>
<tr>
<td>Currency*</td>
<td>USD</td>
<td>USD</td>
</tr>
<tr>
<td>UOM code*</td>
<td>EA</td>
<td>EA</td>
</tr>
<tr>
<td>active*</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Item Classification Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNSPSC Code</td>
<td>Ship &amp; Pack Material (LMLO1002)</td>
<td>Ship &amp; Pack Material (LMLO1002)</td>
</tr>
<tr>
<td>Lead Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Term</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 (①) icon for it in the Purchase Orders table. See View and Manage POs for more info.

To edit a draft ASN or update one in pending receipt status, click on the Edit ( Modiﬁcation) 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

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.

Advance Ship Notices

<table>
<thead>
<tr>
<th>ASN Number</th>
<th>Status</th>
<th>Delivery Date</th>
<th>Last Updated By</th>
<th>Last Updated Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>111</td>
<td>Draft</td>
<td>None</td>
<td>John Doe</td>
<td>06/09/17</td>
<td></td>
</tr>
<tr>
<td>222</td>
<td>Pending Receipt</td>
<td>09/02/17</td>
<td>Jane Doe</td>
<td>05/31/17</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASN Number</td>
<td>ASN number generated by Coupa. Click on it to view the ASN.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the ASN. See the ASN status list below for more info.</td>
</tr>
<tr>
<td>Delivery Date</td>
<td>Date when the ASN was sent.</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>Name of the person who updated the ASN for the last time.</td>
</tr>
<tr>
<td>Last Updated Date</td>
<td>Date when the ASN was updated for the last time.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click on the icons for the following actions:</td>
</tr>
<tr>
<td></td>
<td>• ✏️ - Edit the ASN.</td>
</tr>
<tr>
<td></td>
<td>• ✗ - Delete the ASN.</td>
</tr>
<tr>
<td></td>
<td>• 🔄 - Cancel the ASN.</td>
</tr>
</tbody>
</table>

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.
ASNs can have the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>The ASN has been created, but it hasn't been submitted to your customer.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The ASN has been cancelled.</td>
</tr>
<tr>
<td>Partially Received</td>
<td>The customer has received a part of your shipment.</td>
</tr>
<tr>
<td>Pending Receipt</td>
<td>The customer is waiting for the shipment.</td>
</tr>
<tr>
<td>Received</td>
<td>The customer has received your shipment.</td>
</tr>
</tbody>
</table>

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. See Create Custom Views for more info.
View and Manage Catalogs

Click on the Catalogs tab on the main menu. The Catalogs page appears.

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Name</td>
<td>Name of the catalog. Click on it to view the catalog.</td>
</tr>
<tr>
<td>Created Date</td>
<td>Date when the catalog was created.</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>Date when the catalog was submitted.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Date when the catalog becomes effective.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Date when the catalog expires.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the catalog. See the catalog status list below for more info.</td>
</tr>
<tr>
<td>Unanswered Comments</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Column
- **Actions**: Click on the icons for the following actions:
  - Edit the catalog.
  - Delete the catalog.

You can edit only draft catalogs. You can delete catalogs in draft or awaiting/pending approval status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>The catalog has been accepted by your customer, and all the items in it are now available for purchase within Coupa.</td>
</tr>
<tr>
<td>Awaiting/Pending Approval</td>
<td>The catalog has been received by your customer, but it has not gone through the approval chain yet.</td>
</tr>
<tr>
<td>Draft</td>
<td>The catalog has been created, but may be missing information necessary to send it to the customer.</td>
</tr>
<tr>
<td>Error</td>
<td>There's something wrong with the catalog. Contact your customer to get the catalog back on track.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The catalog has been rejected. Contact your customer to find out why, and then resubmit.</td>
</tr>
</tbody>
</table>

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. See [Create Custom Views](#) for more info.
View and Manage Invoices

Note: If you use Coupa’s invoice compliance, see Compliance as a Service for more info.

Click on the Invoices tab on the main menu. The Invoices page appears.

Invoices

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice #</td>
<td>Invoice number generated by Coupa. Click on it to view the invoice.</td>
</tr>
<tr>
<td>Created Date</td>
<td>Date when the invoice was created.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the invoice. See the invoice status list below for more info.</td>
</tr>
<tr>
<td>PO #</td>
<td>PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO.</td>
</tr>
<tr>
<td>Total</td>
<td>Total amount of the invoice.</td>
</tr>
</tbody>
</table>
### Column Description

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unanswered Comments</td>
<td>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.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click on the Edit (📝) icon to edit an invoice. You can edit only draft invoices.</td>
</tr>
</tbody>
</table>

Invoices can have the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>The invoice has been accepted for payment by your customer.</td>
</tr>
<tr>
<td>Disputed</td>
<td>The invoice has been disputed. See Disputed invoices for more info.</td>
</tr>
<tr>
<td>Draft</td>
<td>The invoice has been created, but it hasn't been submitted to your customer yet.</td>
</tr>
<tr>
<td>Invalid</td>
<td>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.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>The invoice is currently under review by your customer.</td>
</tr>
<tr>
<td>Processing</td>
<td>The invoice is being processed by the AP department and should be paid soon.</td>
</tr>
<tr>
<td>Voided</td>
<td>There's something wrong with the invoice. Contact your customer to get the invoice back on track.</td>
</tr>
</tbody>
</table>

Above the table you can have instructions from the customer specifying, for example, policies or best practices.

You can export the invoices 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. See Create Custom Views for more info.

### 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.

Purchase Orders

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Order Date</th>
<th>Status</th>
<th>Acknowledged At</th>
<th>Items</th>
<th>Unanswered Comments</th>
<th>Total</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>3060</td>
<td>05/31/17</td>
<td>Issued</td>
<td>None</td>
<td>200 Each of Purple Spiral Notebook No</td>
<td>$100.00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3949</td>
<td>05/31/17</td>
<td>Issued</td>
<td>None</td>
<td>1 Box of Blue Pens No</td>
<td>$90.00 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Number</td>
<td>PO number generated by Coupa. Click on it to view the PO.</td>
</tr>
<tr>
<td>Order Date</td>
<td>Date when the PO was created.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the PO. See the PO status list below for more info.</td>
</tr>
<tr>
<td>Acknowledged At</td>
<td>Date when you acknowledged the receipt of the PO, or &quot;None&quot; if not acknowledged.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Items</td>
<td>List of items on the PO.</td>
</tr>
<tr>
<td>Column</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unanswered Comments</td>
<td>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.</td>
</tr>
<tr>
<td>Total</td>
<td>Total amount of the PO.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click on the icons for the following actions:</td>
</tr>
<tr>
<td></td>
<td>• 🤝 - Create (flip the PO into) an invoice.</td>
</tr>
<tr>
<td></td>
<td>• 📄 - Create a credit note.</td>
</tr>
<tr>
<td></td>
<td>• 📊 - Create a service/time sheet.</td>
</tr>
<tr>
<td></td>
<td>• 📦 - Create (flip the PO into) an advance ship notice (ASN).</td>
</tr>
</tbody>
</table>

POs can have the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyer Hold</td>
<td>The PO is approved but pending buyer review.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The PO is cancelled and doesn’t need to be fulfilled.</td>
</tr>
<tr>
<td>Closed</td>
<td>The issued PO was received and then closed, either manually or automatically within Coupa.</td>
</tr>
<tr>
<td>Currency Hold</td>
<td>The PO is on hold due to a currency exchange rate issue.</td>
</tr>
<tr>
<td>Error</td>
<td>There's something wrong with the PO. Contact your customer to get the PO back on track.</td>
</tr>
<tr>
<td>Issued</td>
<td>The PO was approved and sent to you.</td>
</tr>
<tr>
<td>Supplier Window Hold</td>
<td>The PO was approved outside of the order window schedule under contract terms.</td>
</tr>
</tbody>
</table>

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. See Administer the CSP for more info.

Click on the Service/Time Sheets tab on the main menu. The Service/Time Sheets page appears.

Service/Time Sheets

<table>
<thead>
<tr>
<th>Service/Time Sheets</th>
<th>Purchase Order</th>
<th>Status</th>
<th>Submitted At</th>
<th>Approved At</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>468</td>
<td>3472</td>
<td>Draft</td>
<td>None</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>363</td>
<td>3404</td>
<td>Approved</td>
<td>03/02/17</td>
<td>03/02/17</td>
<td></td>
</tr>
<tr>
<td>352</td>
<td>3434</td>
<td>Pending Approval</td>
<td>03/02/17</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>317</td>
<td>3306</td>
<td>Pending Approval</td>
<td>02/25/17</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>316</td>
<td>3305</td>
<td>Pending Approval</td>
<td>02/25/17</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>315</td>
<td>3305</td>
<td>Draft</td>
<td>None</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service/Time Sheets</td>
<td>Service/time sheet number generated by Coupa. Click on it to view the service/time sheet.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>PO number of the order that contains the line associated with the service/time sheet. Click on it to view the PO.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the service/time sheet: approved, draft, or pending approval.</td>
</tr>
<tr>
<td>Column</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Submitted At</td>
<td>Date when you submitted the service/time sheet to your customer.</td>
</tr>
<tr>
<td>Approved At</td>
<td>Date when your customer approved the service/time sheet.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click on the icons to perform the following actions on a service/time sheet:</td>
</tr>
<tr>
<td></td>
<td>• ✍️ - Edit.</td>
</tr>
<tr>
<td></td>
<td>• ❌ - Delete.</td>
</tr>
<tr>
<td></td>
<td>• ⬅️ - Withdraw.</td>
</tr>
<tr>
<td></td>
<td>You can edit or delete only draft service/time sheets.</td>
</tr>
<tr>
<td></td>
<td>You can withdraw service/time sheets only in pending approval status.</td>
</tr>
</tbody>
</table>

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. See Create Custom Views for more info.
View PO Lines

Click on the Order Lines tab to see info on the PO lines for each PO.

Purchase Order Lines

<table>
<thead>
<tr>
<th>PO Number (Header)</th>
<th>Line</th>
<th>Order Status (Header)</th>
<th>Item</th>
<th>Total Item Quantity</th>
<th>Line Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>3056 1</td>
<td>1</td>
<td>Issued</td>
<td>200 Each of Purple Spiral Notebook</td>
<td>100</td>
<td>100.00</td>
</tr>
<tr>
<td>3048 3</td>
<td>1</td>
<td>Issued</td>
<td>1 Box of Pen 101</td>
<td>1</td>
<td>90.00</td>
</tr>
<tr>
<td>3048 2</td>
<td>1</td>
<td>Issued</td>
<td>1 Box of Pen 102</td>
<td>1</td>
<td>80.00</td>
</tr>
<tr>
<td>3048 1</td>
<td>1</td>
<td>Issued</td>
<td>1 Box of Pen 103</td>
<td>1</td>
<td>100.00</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Number (Header)</td>
<td>PO number generated by Coupa. Click on it to see the PO line.</td>
</tr>
<tr>
<td>Line</td>
<td>PO line number.</td>
</tr>
<tr>
<td>Order Status (Header)</td>
<td>Current status of the PO. See the PO status list above for more info.</td>
</tr>
<tr>
<td>Item</td>
<td>List of items on each PO line.</td>
</tr>
<tr>
<td>Total Item Quantity</td>
<td>Total quantity of the PO line.</td>
</tr>
<tr>
<td>Line Total</td>
<td>Total amount of the PO line.</td>
</tr>
</tbody>
</table>

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.

On the Purchase Orders and Purchase Order Lines pages, 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. See Create Custom Views for more info.
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.
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).

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td>Invite new users, and manage what each user can do in the CSP and which customers your users can interact with.</td>
</tr>
<tr>
<td>Merge Requests</td>
<td>Manage any merge requests that you sent to or received from other supplier accounts.</td>
</tr>
<tr>
<td>E-Invoicing Setup</td>
<td>Set up your account for electronic invoicing.</td>
</tr>
<tr>
<td>Fiscal Representatives</td>
<td>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.</td>
</tr>
<tr>
<td>Remit-To</td>
<td>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.</td>
</tr>
<tr>
<td>Terms of Use</td>
<td>To use the Coupa Supplier Portal (CSP), you must accept the terms of use.</td>
</tr>
<tr>
<td>Coupa Accelerate</td>
<td>Set preferred accelerated payment terms (early payment discounts terms) to be applied to any of your customers across all your invoices.</td>
</tr>
<tr>
<td>Preferences</td>
<td></td>
</tr>
</tbody>
</table>
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.

Click on the Edit button to open the Edit user access for [User Name] window.
You can change the user’s name, modify the user’s permissions and customer access, or deactivate the user.

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

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Gives full access to all CSP functions, except for user administration.</td>
</tr>
<tr>
<td>Permissions</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Admin</td>
<td>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.</td>
</tr>
<tr>
<td>Orders</td>
<td>Allows viewing and managing purchase orders (POs) received from customers.</td>
</tr>
<tr>
<td>Invoices</td>
<td>Allows creating and sending invoices to customers.</td>
</tr>
<tr>
<td>Catalogs</td>
<td>Allows creating and managing customer-specific electronic catalogs.</td>
</tr>
<tr>
<td>Profiles</td>
<td>Allows modifying customer-specific profiles.</td>
</tr>
</tbody>
</table>

**Note:** All users, regardless of permissions, can edit the public profile.

<table>
<thead>
<tr>
<th>ASNs</th>
<th>Allows creating and sending advance ship notices (ASN s) to customers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service/Time Sheets</td>
<td>Allows creating and submitting service/time sheets against POs.</td>
</tr>
</tbody>
</table>

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

Request Merge  Remove

SupplierB
supplierB@supplier.com

Request Merge  Remove

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

- **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. See Manage Users for more info.

- **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:

<table>
<thead>
<tr>
<th>Element</th>
<th>Merge Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connected customers and customer profiles</td>
<td>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.</td>
</tr>
<tr>
<td>Remit-to addresses</td>
<td>Remit-to information is transferred only for addresses that are available to all customers.</td>
</tr>
</tbody>
</table>
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](image)

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 e-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, marked with a red asterisk (*) and click Done.

<table>
<thead>
<tr>
<th>Field/Checkbox</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What address do you invoice from?</td>
<td>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.</td>
</tr>
<tr>
<td>Country</td>
<td>The country you selected when adding the legal entity.</td>
</tr>
<tr>
<td>Use this address for Remit-To</td>
<td>Selected by default. Deselect it if your remit-to address is different from your legal entity or you have more than one remit-to locations.</td>
</tr>
<tr>
<td>Use this for Ship From address</td>
<td>Selected by default. Deselect it if your ship-from address is different from your legal entity or you have more than one location.</td>
</tr>
<tr>
<td>Tip: Include this information on the invoice when the addresses are different. For many countries, including this information is mandatory.</td>
<td></td>
</tr>
<tr>
<td>What is your Tax ID?</td>
<td>Enter your local tax ID if you are not registered for VAT or GST in some countries.</td>
</tr>
<tr>
<td>Country</td>
<td>Select your tax country form the drop-down list.</td>
</tr>
<tr>
<td>Field/Checkbox</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tax/VAT ID</td>
<td>Enter the tax/VAT ID, including the prefix to the number, for example, GB1234567890.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can add more tax IDs by clicking on the Add additional Tax ID link.</td>
</tr>
<tr>
<td>I would like to use this as a local tax number</td>
<td>Select the checkbox if you want to use the tax ID as a local tax number.</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
</tr>
<tr>
<td>Invoice from Code</td>
<td>Tie your CSP invoice-from address (that is, registered address) with the corresponding address in your ERP.</td>
</tr>
<tr>
<td>Preferred Language</td>
<td>Select your language from the drop-down list.</td>
</tr>
<tr>
<td>Bank Info and Assign Customers</td>
<td>Click on this link for more optional fields.</td>
</tr>
<tr>
<td><strong>Banking Information</strong></td>
<td>Optional banking information for the remit-to address. You can use both domestic (US) and international (global) banking information.</td>
</tr>
<tr>
<td></td>
<td>This information is displayed on the invoice, for example, bank name, beneficiary name, account number, routing number (ABA), IBAN, sort code, and SWIFT code.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Banking information is required for compliant invoicing when indicated (with a red asterisk). Otherwise, banking info is not required and remains private.</td>
</tr>
<tr>
<td>Assign Customers</td>
<td>Select whether all or which customers can see the remit-to address.</td>
</tr>
</tbody>
</table>

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?

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.

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.

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your Remit-To Address?</td>
<td>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.</td>
</tr>
<tr>
<td>Integration Information</td>
<td>Code to tie your CSP remit-to address with the corresponding address in your ERP.</td>
</tr>
<tr>
<td>Banking Information</td>
<td>Optional banking information for the remit-to address. You can use both domestic (US) and international (global) banking information. This information is displayed on the invoice, for example, bank name, beneficiary name, account number, routing number (ABA), IBAN, sort code, and SWIFT code.</td>
</tr>
<tr>
<td>Note: Banking information is required for compliant invoicing when indicated (with a red asterisk). Otherwise, banking info is not required and remains private.</td>
<td></td>
</tr>
<tr>
<td>Remit-To Contact</td>
<td>Optional contact information for the remit-to address, for example, name, email, phone number, fax number, website.</td>
</tr>
<tr>
<td>Assign Customers</td>
<td>Select whether all or which customers can see the remit-to address.</td>
</tr>
</tbody>
</table>

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.

### 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.

![Choose Remit-To Address window](image)

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

123 Success Ave
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 (i) with a tooltip to provide guidance on the requested info.
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.

Location Code
Address Name
Street Address
Street Address 2
Postal Code
City
State Region
Country
Bank Account Name
Bank Account Number
Bank Routing Number
IBAN Number
Sort Code

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. See Set up E-Invoicing for more info.

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.

In the appearing window, fill in at least the mandatory (address) fields (marked with a red asterisk).
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. See Set up E-Invoicing for more info.

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.

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 Location

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

Tax Registration

Tax Country: United States
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.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Terms of Use</th>
</tr>
</thead>
</table>

Valid until May 31, 2018
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 customers across some or all your invoices and/or purchase orders.

**Note:** You can use this feature successfully only if your customers have it enabled.

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.
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 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.

<table>
<thead>
<tr>
<th>Your original payment term</th>
<th>Your preferred accelerated payment term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net 30</td>
<td>None</td>
</tr>
<tr>
<td>Net 45</td>
<td>None</td>
</tr>
<tr>
<td>Net 60</td>
<td>None</td>
</tr>
<tr>
<td>Net 75</td>
<td>0.5%/35 NET 45</td>
</tr>
<tr>
<td>Net 90</td>
<td>1%/25 NET 45</td>
</tr>
<tr>
<td>Net 120</td>
<td>None</td>
</tr>
</tbody>
</table>

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

- **Name**: Type Name
- **Email**: Type email address

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

**Valid until May 31, 2018**
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, EDI, and so on.

**Accelerate orders or invoices**

Open the order/invoice and click on the Accelerate Payment button next to the Payment Terms field.

---

**Purchase Order #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: Net 60  
Attachments: None

In the appearing Accelerate Payments pop-up, select the new payment term and click Update.
The new payment term is applied and your order is accelerated.

Purchase Order #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.
This chapter contains the following topics:

**Account and Login and 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 and Login and 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. See Register for the CSP for more info.

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. See Create Your Account for more info.

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. See Enable or Disable Two-Factor Authentication for more info.

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 identify.
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. See Log in with two-factor authentication for more info.

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.

See Log in to the CSP for more info.

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 (for example, 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.

See Registering for the CSP for more info.

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 info 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. See http://cxml.org for more info.
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. See Coupa Supplier Portal for more info.

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.
- EDI, which is another form of automated invoicing, based on Coupa’s standard EDI format.
- 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. See Creating a Credit Note for more info.

Once an invoice is submitted, it can't be changed in any way. See Creating or Editing an Invoice for more info.

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.
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 or an Excel document.

By default, the maximum number of rows that you can export is 10,000. If you try to export a larger table, you receive an error message stating that only 10,000 rows are exported.

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.

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.
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.
Other

Where can I find information about integrating with Coupa?
See Suppliers for more info.

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.