

Purpose

The Coupa Supplier Portal (CSP) is one of the e-Invoicing channels that can push Invoices from the suppliers directly into Coupa. The CSP allows the supplier to create PO-backed, non-PO backed or contract-backed invoices on the Coupa Supplier Portal and is suitable for suppliers with low to medium transaction volume.

Content

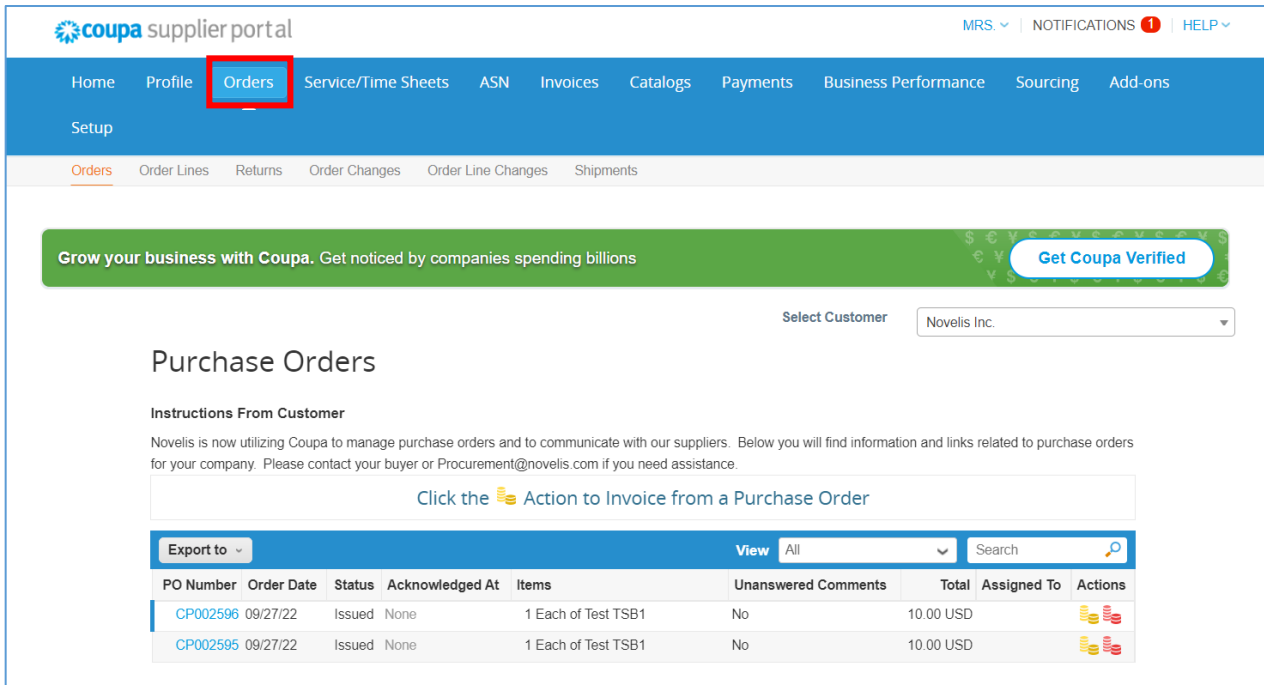
1. Viewing Purchase Orders
 - Email Notification Of PO
 - User Notification Of PO
2. Create an Invoice in CSP
3. Create a Credit Note
4. Create an Invoice via SAN
5. Checking CSP generated Invoice status in Coupa
6. FAQs
7. Additional Resources

1. Viewing Purchase Orders

To start managing Purchase orders, from the homepage, click Purchase Orders. Each purchase order will be given an individual number when raised through Coupa. By clicking on the PO number, the details of the PO will be displayed.

NOTE: Suppliers must confirm that Novelis is the selected customer in the dropdown box. If they are your only Coupa customer, it will populate automatically for you.

NOTE: If your PO has a “-” and a number at the end, e.g., CP012345-1, **this means that the PO has been adjusted and this is revision “1” of the PO, it does not mean that this is a new release or a new PO.** If you encounter this, please contact your buyer before shipping any items.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a secondary navigation bar with 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Shipments'. A green banner reads 'Grow your business with Coupa. Get noticed by companies spending billions' with a 'Get Coupa Verified' button. A 'Select Customer' dropdown is set to 'Novelis Inc.'. The main heading is 'Purchase Orders'. Below it, 'Instructions From Customer' states: 'Novelis is now utilizing Coupa to manage purchase orders and to communicate with our suppliers. Below you will find information and links related to purchase orders for your company. Please contact your buyer or Procurement@novelis.com if you need assistance.' A button says 'Click the Action to Invoice from a Purchase Order'. Below is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. Two rows are visible, both for PO CP002596 dated 09/27/22, with status 'Issued' and 'None' for acknowledged at, and '1 Each of Test TSB1' for items, 'No' for unanswered comments, and '10.00 USD' for total.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP002596	09/27/22	Issued	None	1 Each of Test TSB1	No	10.00 USD		
CP002595	09/27/22	Issued	None	1 Each of Test TSB1	No	10.00 USD		

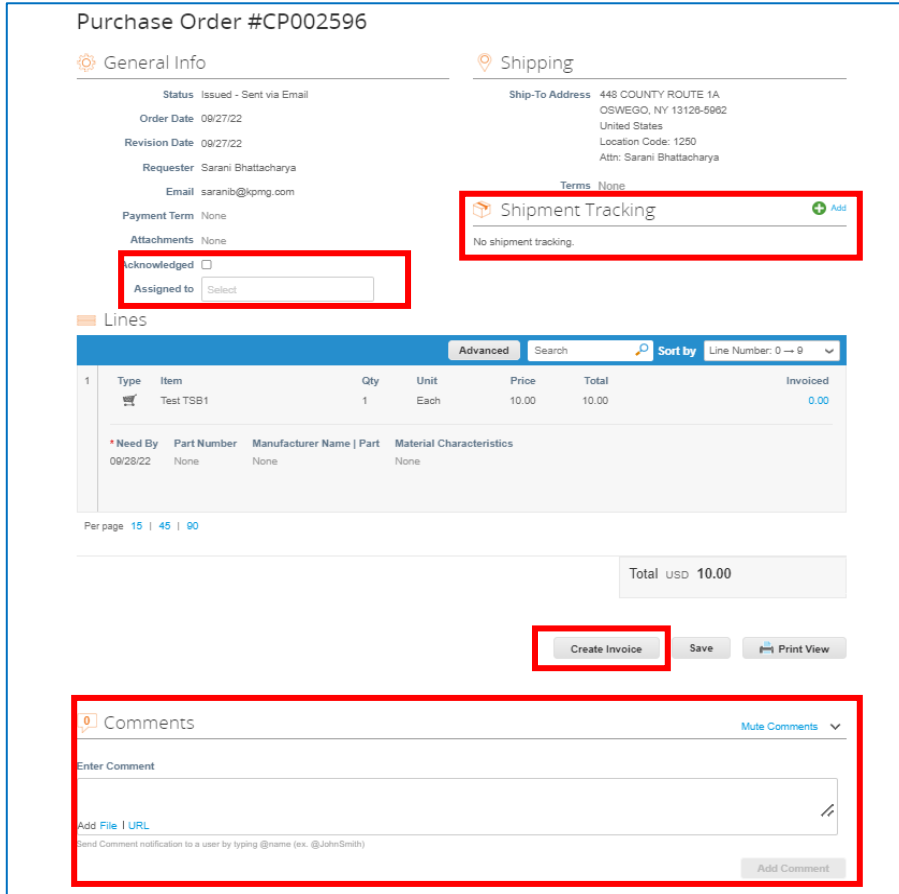
Email Notification of PO

When a purchase order is raised, you will receive an email notification regarding this. The email is sent to the PO email address.

User Notification of PO

When a purchase order is sent, you will receive a notification when you log on to the CSP. Hover over 'notifications' on the homepage to see a preview of the new notification.

You can view a purchase order by selecting the PO number from the Orders tab. You will be taken directly to the PO page.



Purchase Order #CP002596

General Info

Status: Issued - Sent via Email
Order Date: 09/27/22
Revision Date: 09/27/22
Requester: Sarani Bhattacharya
Email: saranib@kpmg.com
Payment Term: None
Attachments: None

Acknowledged
Assigned to

Shipping

Ship-To Address: 448 COUNTY ROUTE 1A
OSWEGO, NY 13128-5902
United States
Location Code: 1250
Attn: Sarani Bhattacharya
Terms: None

Shipment Tracking
No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test TSB1	1	Each	10.00	10.00	0.00

Per page 15 | 45 | 90

Total USD 10.00

Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

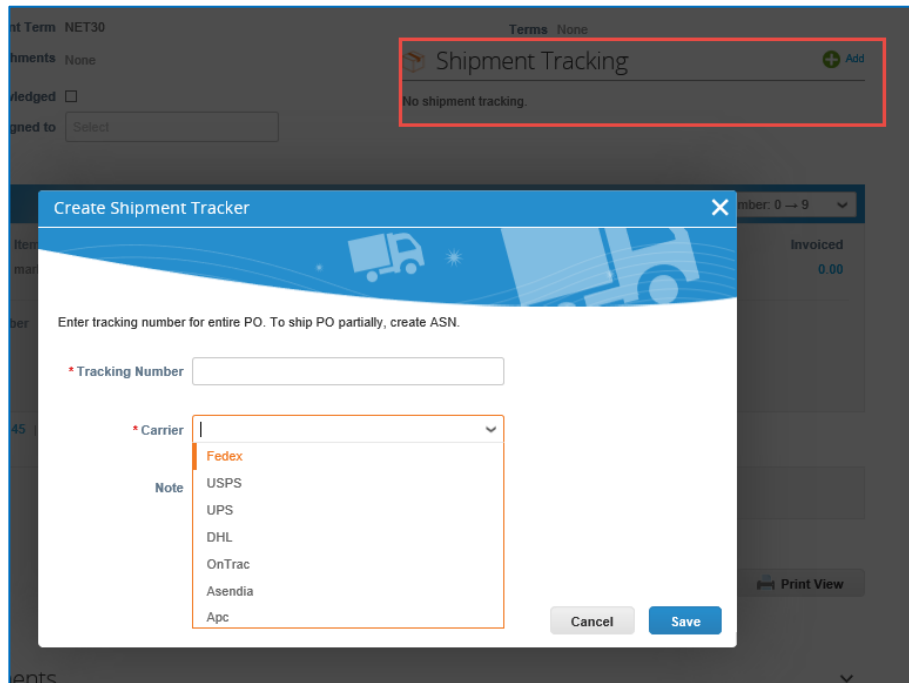
Acknowledged: By checking this box you are acknowledging that you've received and can fulfill the PO. The acknowledgement date will appear on the CSP PO page.

Assigned to: Select the name of who is working on this PO. If there is only one primary contact, then select their name.

Shipment Tracking: You can provide information related to your delivery including the tracking number and mail carrier.

Create Invoice: You may also create an invoice by clicking on the 'Create Invoice' button. See next page for details.

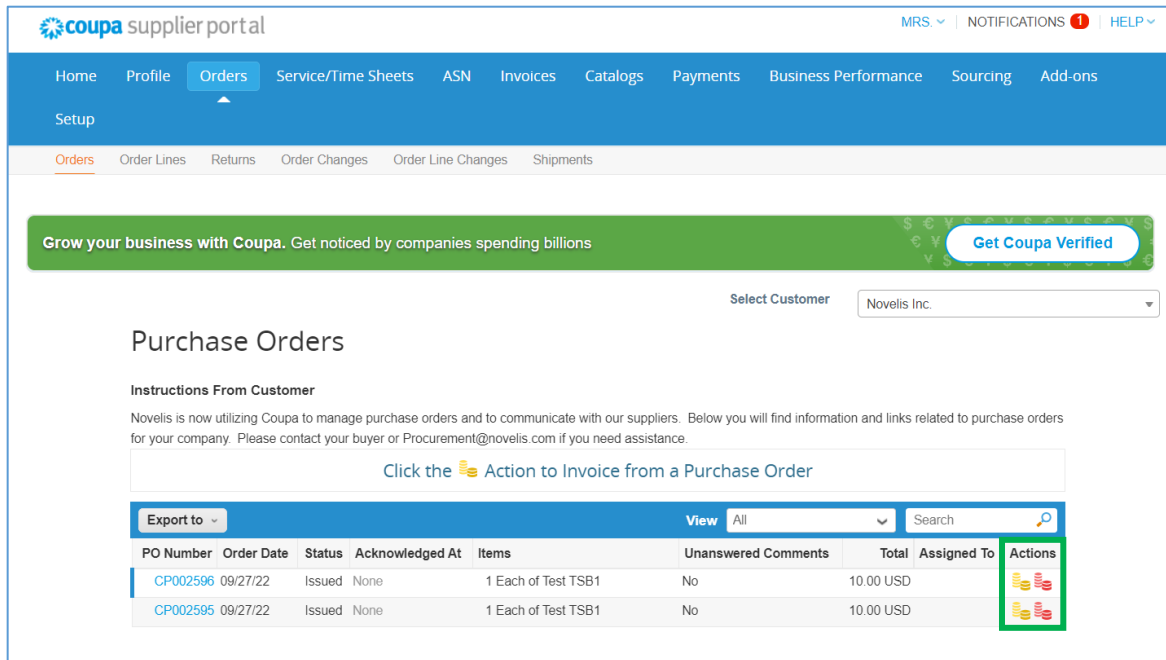
Comments: The comments field can be utilized for additional communication.



NOTE: If you are including shipping information, select the 'add' button and fill out the fields from the popup window.

2. Create an Invoice in CSP

You can flip a PO into an invoice. Flipping the PO into an invoice transfers all the PO line information onto an invoice. To flip the purchase order to an invoice, click on the **gold coin stack**. The invoice screen will be displayed.



Or you may also click on the PO Number and then click the “Create Invoice” button.

Once you select Create Invoice you will be taken to the invoice creation page.

To complete the invoice, follow the steps below:

Step 1: Enter a unique invoice number

NOTE: When you create each invoice, you will be asked to create an invoice number. Keep in mind that the same invoice number **cannot** be used twice. The correct invoice number will be indicated with a green tick

Step 2: Enter the invoice date

Step 3: Validate the Payment Term from the PO transmitted from Coupa (this should be auto-populated)

Step 4: Attach the image of the invoice to the Image Scan field

NOTE: One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, TIFF, or PDF.

Step 5: Review pre-populated mandatory fields for accuracy

NOTE: When entering the state, please enter state abbreviation only (i.e., AZ, CA, WI, IL, NY, etc.)

Step 6: Input tax and other fees

NOTE: If the Line Level Taxation box is checked, you can add taxes on the line level of the invoice, in addition to the summary level.

Step 7: Select the submit button to submit the invoice for approval

Step 8: Select send invoice from the pop-up window

You will need to fill in and review at least the mandatory fields (marked with a red asterisk). You can create or choose an invoice from, a remit-to, and/or a ship from an address by clicking on the corresponding **Search** (magnifying glass) icon in the **From** section.

Orders Order Lines Returns Order Changes Order Line Changes Shipments


Grow your business with Coupa. Get noticed by companies spending billionsGet Coupa Verified

Select Customer Novelis Inc.

Create Invoice Create

General Info

1 * Invoice # ✓

2 * Invoice Date 

* Payment Term 0.5% 15_NET 30 (SAP-PGE) 3

* Currency

Status Draft

4 * Image Scan Block Leaves 2022.PNG


Supplier Note


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


From

* Supplier Jay's Janitorial Services

Supplier Tax ID

* Invoice From Address Jay's Janitorial Services  5
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

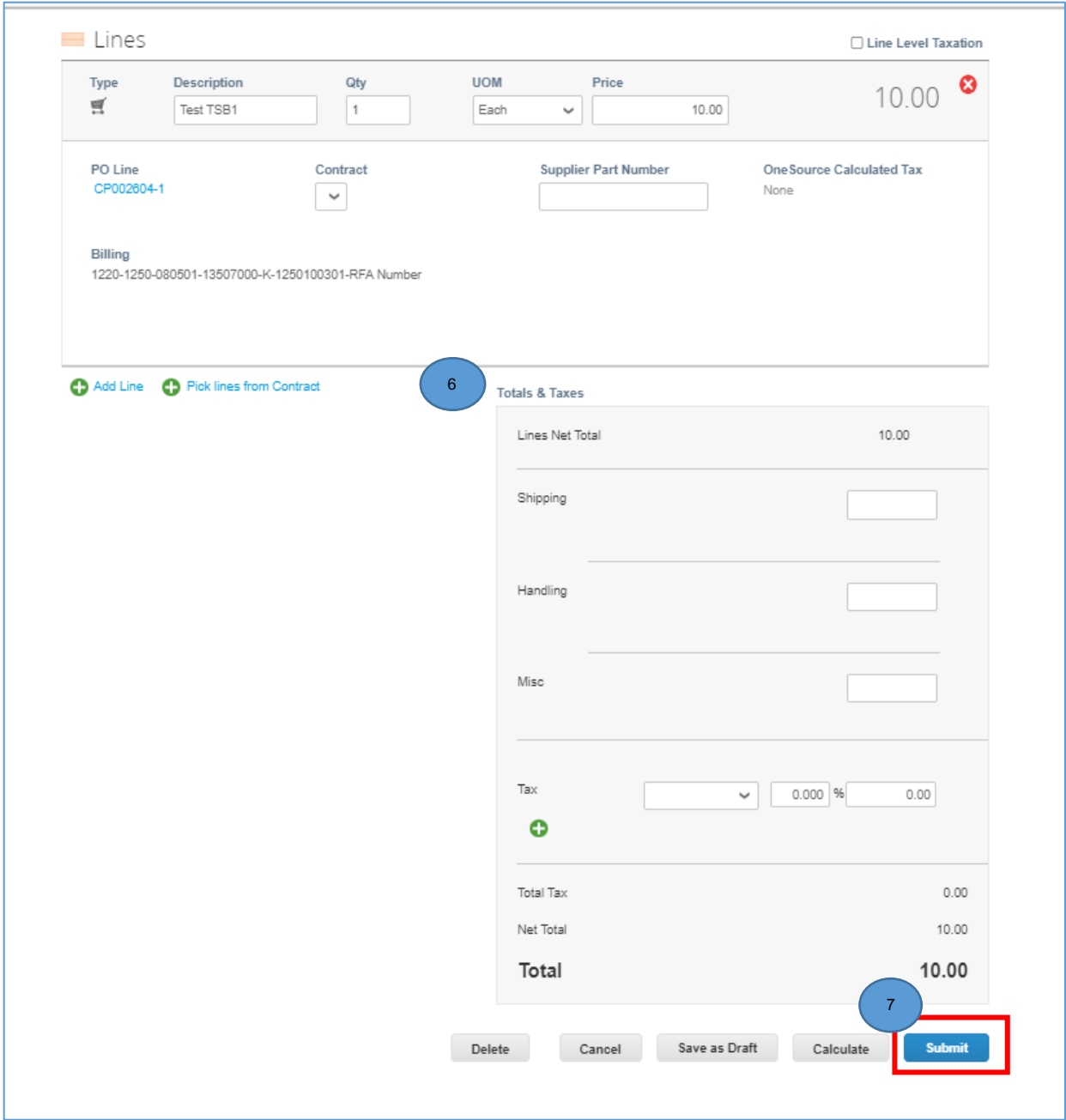
* Remit-To Address Jay's Janitorial Services 
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

* Ship From Address Jay's Janitorial Services 
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

To

Customer Novelis Inc.

Bill To Address Novelis Corporation
3560 Lenox Rd
Suite 2000
Atlanta, GA 30326
United States



Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	Test TSB1	1	Each	10.00	10.00 ✕

PO Line
CP002804-1

Contract
▼

Supplier Part Number

One Source Calculated Tax
None

Billing
1220-1250-080501-13507000-K-1250100301-RFA Number

[+ Add Line](#) [+ Pick lines from Contract](#)

Totals & Taxes

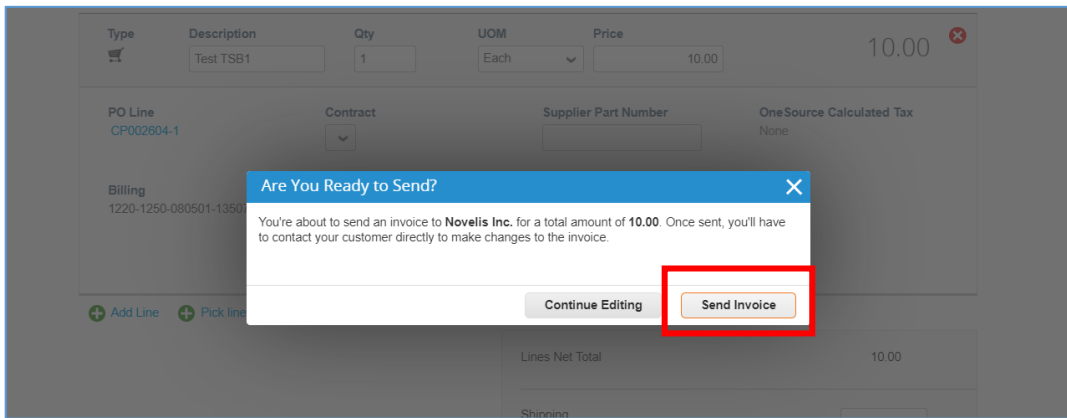
Lines Net Total	10.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.00
Total Tax	0.00
Net Total	10.00
Total	10.00

In the **Taxes and Totals** section, you can enter values and select tax rates for shipping and miscellaneous costs.

NOTE: Clicking Calculate will give you the gross total amount considering the tax values

And in the comments section, Novelis and the supplier can send Notes back and forth

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.

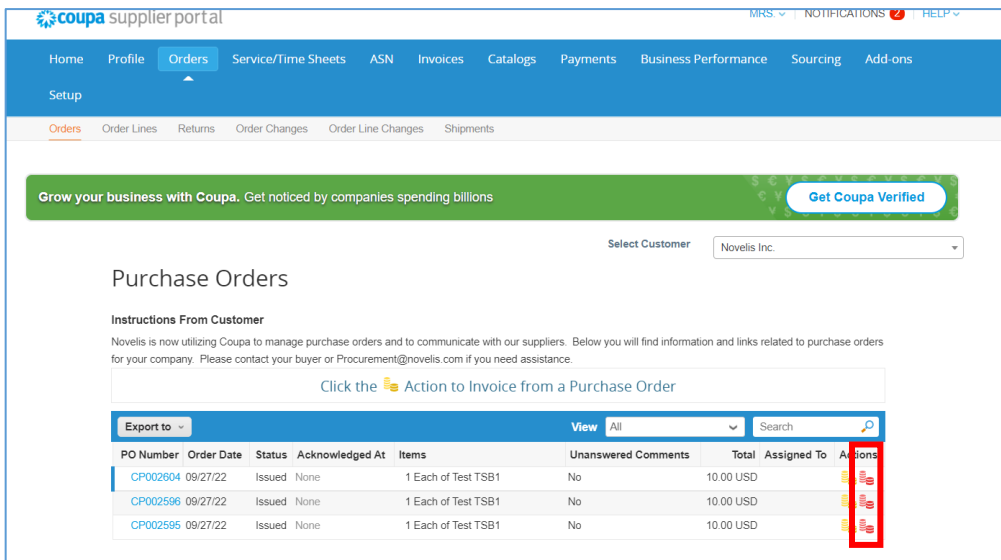


NOTE: If you want to make changes to the invoice after submitting it, you have to contact your customer.

NOTE: You will receive a notification after the invoice is submitted. You will also be informed when a customer performs an action.

3. Create a Credit Note

Credit Notes can also be created in the CSP. From the purchase orders tab, you can click the **red coin stack** next to the desired PO to be taken directly to the Credit Note creation page.



Once you input and confirm the information requested in the mandatory fields (represented by an asterisk*) you will scroll to the bottom of the page and determine the adjustment type for the credit Note: quantity, price, and other.

Many of the fields for creating a credit Note are similar to the fields for creating an invoice. Please check the following:

1. **Credit Note #:** Input a unique identifying number for your credit Note
2. **Credit Note Date:** Input the date on which the credit Note is created
3. **Payment Term:** Check the payment term from the original invoice
4. **Currency:** Check the currency from the original invoice
5. **Original Invoice #:** Input the invoice number that the credit Note will be created against
6. **Original Invoice Date:** Date Input the date that the initial invoice was created
7. **Image Scan:** Attach the image of the invoice to the Image Scan field
8. **Remit-To Address:** Confirm the correct Remit-To Address is input

NOTE: One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, TIFF, or PDF.

coupa supplier portal MRS | NOTIFICATIONS 2 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Payments Business Performance Sourcing Add-ons

Setup

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Grow your business with Coupa. Get noticed by companies spending billions [Get Coupa Verified](#)

Select Customer

Create Credit Note Create

General Info

1 * Credit Note # ✓

* Credit Note Date 2

3 * Payment Term 0.5% 15_NET 30 (SAP-PGE)

* Currency 4

Status Draft

5 * Original Invoice #

Original Invoice Date 6

7 * Image Scan Block Leaves 2022.PNG

Supplier Note

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

From

* Supplier Jay's Janitorial Services

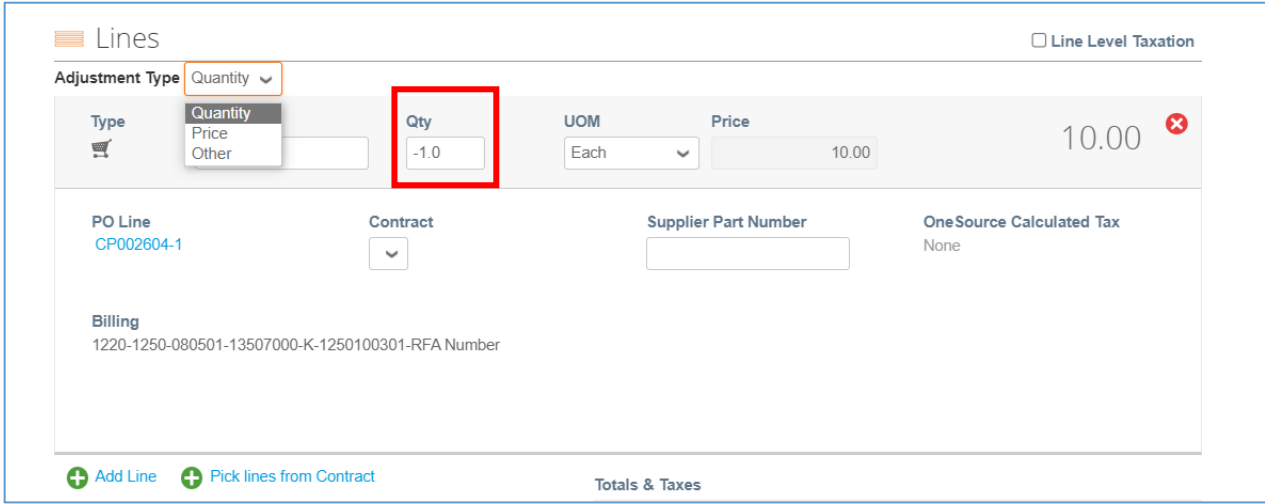
Supplier Tax ID

* Invoice From Address Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States 8

* Remit-To Address Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

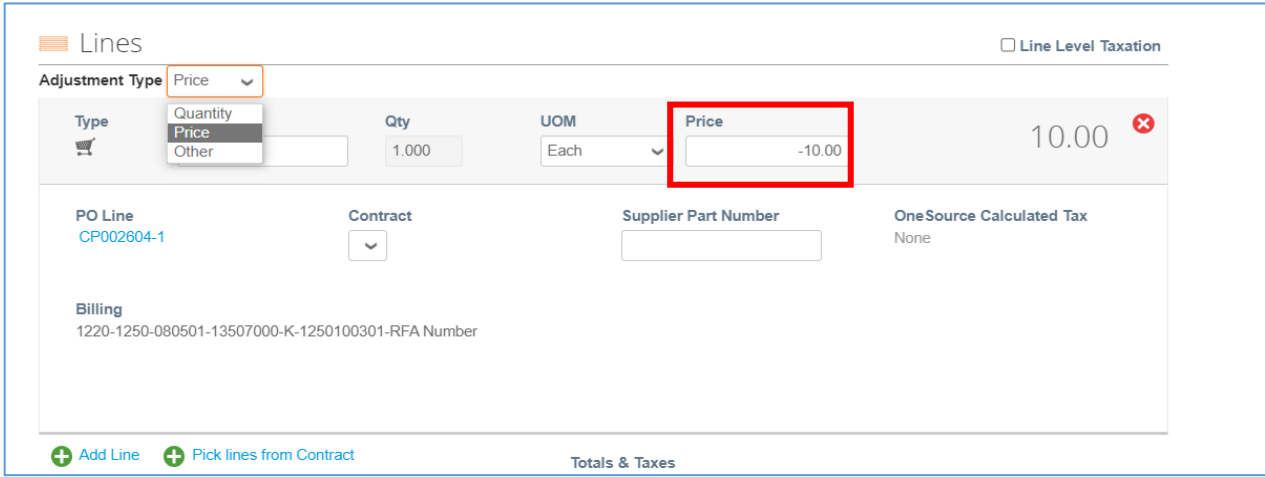
* Ship From Address Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

1. Verify all the other required fields including line level taxes, shipping, and miscellaneous taxes (if applicable)
2. **Credit Note Adjustments: Line Level**
 - If the quantity is selected as the adjustment type, you will input a negative value in the Qty field



The screenshot shows the 'Lines' form in Coupa. The 'Adjustment Type' dropdown is set to 'Quantity'. The 'Qty' field is highlighted with a red box and contains the value '-1.0'. The 'Price' field contains '10.00'. Below the main form, there are fields for 'PO Line' (CP002604-1), 'Contract', 'Supplier Part Number', and 'OneSource Calculated Tax' (None). At the bottom, there are buttons for '+ Add Line' and '+ Pick lines from Contract', and a 'Totals & Taxes' section.

- If price is selected as the adjustment type, you will input a negative value in the price field



The screenshot shows the 'Lines' form in Coupa. The 'Adjustment Type' dropdown is set to 'Price'. The 'Price' field is highlighted with a red box and contains the value '-10.00'. The 'Qty' field contains '1.000'. Below the main form, there are fields for 'PO Line' (CP002604-1), 'Contract', 'Supplier Part Number', and 'OneSource Calculated Tax' (None). At the bottom, there are buttons for '+ Add Line' and '+ Pick lines from Contract', and a 'Totals & Taxes' section.

- 3. Fill up level taxes, shipping, and miscellaneous taxes (if applicable)
- 4. Click the **Submit** button

NOTE: All credit Note values will need to be negative in order to submit.

VAT ID 84908 7549 RT0001
Buyer GST/HST ID 84908 7549 RT0001

Lines Line Level Taxation

Adjustment Type

Type	Description	Qty	UOM	Price	
	<input type="text" value="Test TSB1"/>	<input type="text" value="1.0"/>	<input type="text" value="Each"/>	<input type="text" value="10.00"/>	<input style="color: red; font-weight: bold; text-decoration: underline; text-decoration-color: red;" type="text" value="10.00"/>

PO Line Contract Supplier Part Number OneSource Calculated Tax

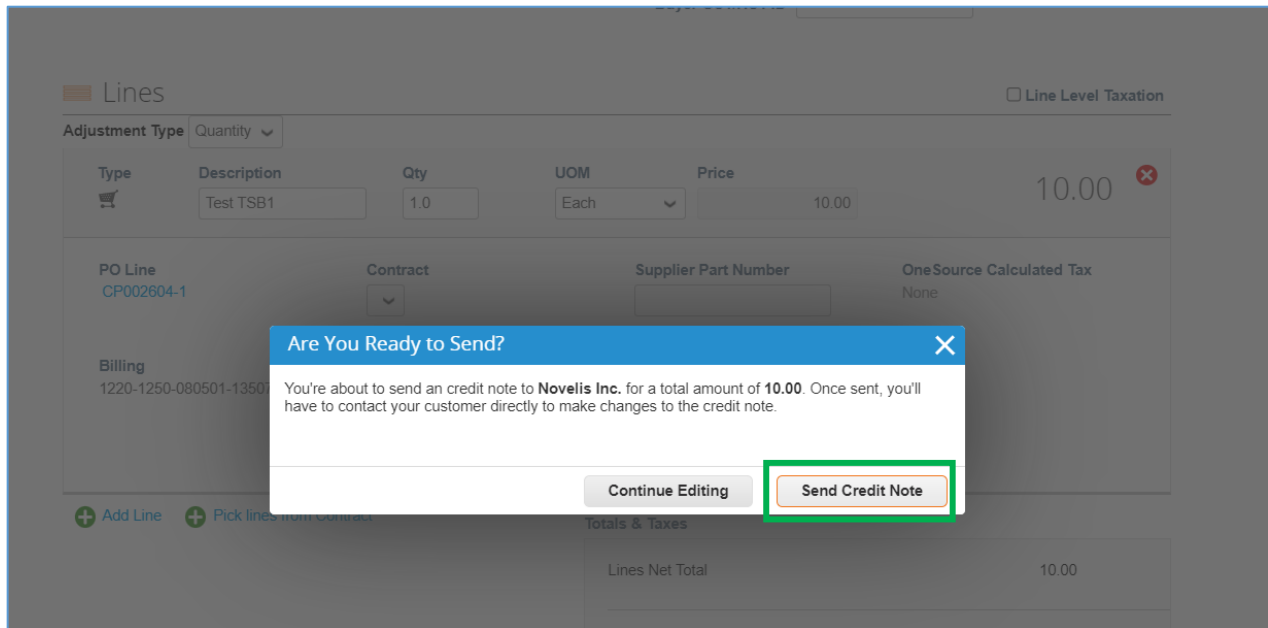
Billing
1220-1250-080501-13507000-K-1250100301-RFA Number

[+ Add Line](#) [+ Pick lines from Contract](#)

Totals & Taxes

Lines Net Total	10.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	10.00
Total	10.00

Once you submit the correct adjustment type and the adjustment, you will click 'submit' at the bottom of the page. Upon doing so a pop-up window will appear. You must select 'Send Credit Note' in order to successfully submit the credit Note.



4. Create an Invoice via SAN



Supplier Actionable Notifications (SAN) allow you to act on POs directly from email notifications for POs created in Coupa. You will have the option to acknowledge, create an invoice from, or add a comment to a PO. In addition, you can create a CSP account if you want to take advantage of the benefits of working with Novelis through the CSP.

NOTE: Suppliers can invoice using the CSP method mentioned earlier, as well as SAN.


Suppliers also get notifications after they submit an invoice, letting them know when their customers perform an action. This improves transparency and further reduces the need for suppliers to track down the status of their invoices through phone calls or emails.


Once a purchase order is created, the supplier receives an email notification. You will receive a SAN with action buttons and from there you can create an invoice, add a comment to the PO, acknowledge the receipt of the PO, and even create a CSP account by clicking on the relevant button.

[EXTERNAL] Novelis Corporation Purchase Order #CP002604

 Novelis Inc. <do_not_reply@novelis-test.coupahost.com>
To  Sarani Bhattacharya

Red Category





 If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

 purchase_order.html
19 KB

Contact Sarani Bhattacharya
saranib@kpmg.com

Manage Order **Create Invoice**

Orders details below

Acknowledge PO Add Shipment Tracking Accelerate Payment Add Comment

Once the supplier clicks 'create invoice' they will be taken to the Coupa invoice creation page, where they will fill in the mandatory fields and complete the same steps as outlined for creating an invoice from a flipped PO above. You will then submit the invoice for approval.

https://novelis-test.coupa.com/supplier_invoices/edit/2810?supplier_id=0

Create Invoice Create

General Info

- Invoice #** TSB7_INV ✓
- Invoice Date** 09/27/22
- Payment Term** 0.5% 15_NET 30 (SAP-PGE)
- Currency** USD
- Status** Draft
- Image Scan** Choose File No file chosen
- Supplier Note**
- Attachments** Add File | URL | Text

From

- Supplier** Jay's Janitorial Services
- Supplier Tax ID**
- Invoice From Address** Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States
- Remit-To Address** Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States
- Ship From Address** Jay's Janitorial Services
448 COUNTY ROUTE 1A OSWEGO,
NY 13126-5962 United States
New York, 1250
United States

To

- Customer** Novelis Inc.
- Bill To Address** Novelis Corporation
3560 Lenox Rd
Suite 2000
Atlanta, GA 30326
United States
- VAT ID** 84908 7549 RT0001

Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	Test TSB1	1	Each	10.00	10.00 ✖

PO Line CP002804-1 **Contract** **Supplier Part Number** **OneSource Calculated Tax** None

Billing 1220-1250-080501-13507000-K-1250100301-RFA Number

[Add Line](#) [Pick lines from Contract](#)

Totals & Taxes

Lines Net Total	10.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.00
Total Tax	0.00
Net Total	10.00
Total	10.00

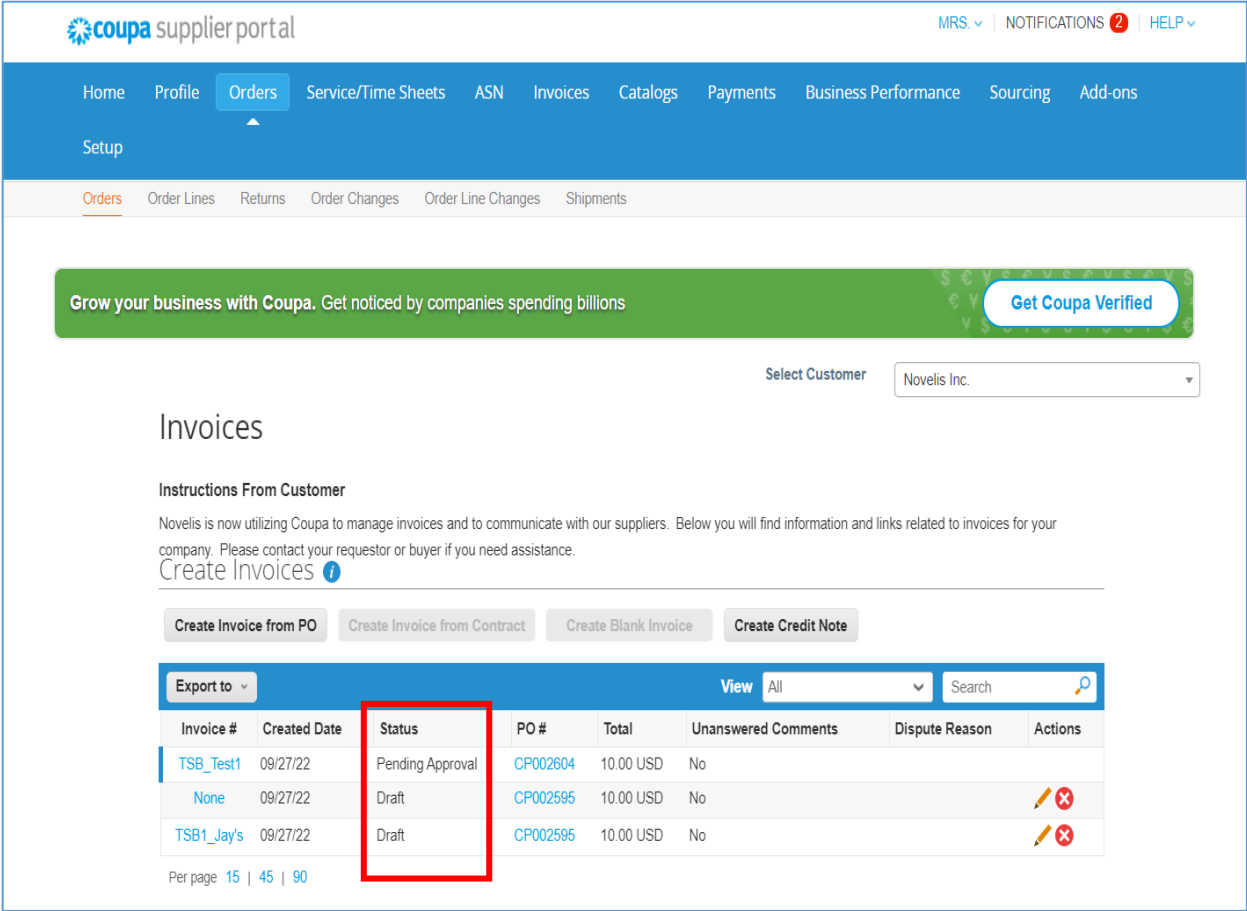
Comments

[Mute Comments](#)

Enter Comment

5. Checking CSP generated Invoice status in Coupa

From the Invoices page, you can review the status of your invoice. Invoices that have been sent to Novelis (into Coupa) will be labeled as 'Pending Approval'. Once the invoice is approved in Coupa, the status will read as 'Approved'



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' on the left and 'MRS.' | 'NOTIFICATIONS 2' | 'HELP' on the right. Below this is a main menu with 'Home', 'Profile', 'Orders' (highlighted), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. A secondary menu below 'Orders' includes 'Setup', 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Shipments'. A green banner reads 'Grow your business with Coupa. Get noticed by companies spending billions' with a 'Get Coupa Verified' button. A 'Select Customer' dropdown is set to 'Novelis Inc.'. The main heading is 'Invoices'. Below it, 'Instructions From Customer' states that Novelis uses Coupa for invoice management. There are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below shows invoice details with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The 'Status' column is highlighted with a red box. The table contains three rows: 'TSB_Test1' (Pending Approval), 'None' (Draft), and 'TSB1_Jay's' (Draft). The 'Per page' indicator shows 15 | 45 | 90.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TSB_Test1	09/27/22	Pending Approval	CP002604	10.00 USD	No		
None	09/27/22	Draft	CP002595	10.00 USD	No		✎ ✖
TSB1_Jay's	09/27/22	Draft	CP002595	10.00 USD	No		✎ ✖

6. CSP Invoice Statuses

<u>Status</u>	<u>Description</u>
Approved	The invoice has been accepted for payment by your customer
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Disputed	The invoice has been disputed.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. Invoices with this status are only visible to you, not your customer.
Pending Approval	The invoice is under review by your customer
Processing	The invoice is being processed by the AP department and should be paid soon
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.

7. Frequently Asked Questions

<u>Questions</u>	<u>Answers</u>
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.
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.
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 is 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. Discuss with your customer their preference.

8. Additional Resources

Feel free to explore the Coupa site for all things CSP! Here you can find additional videos, supplier guides, and more.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

[More Questions and Answers - Coupa Success Portal](#)

[Account, Login, Registration FAQ - Coupa Success Portal](#)