



# Coupa Supplier Portal (CSP)

## Quick Guide

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Procurement Performance Team • APAC Hub Procurement

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# Coupa Supplier Quick Start Guide

## Quick Start Guide - Supplier

### Introduction

You will find the Coupa Supplier Portal, very easy to use. This guide will help you to create a catalog, view POs and create Invoices.

### Signing-in

1. **Activate your account:** You should have received an email invitation to join the Coupa Supplier Portal. Follow the instructions provided. You can also register directly on <https://supplier.coupahost.com>
2. **Reset your account:** If you have forgotten your username or password, click on the link at the bottom of the Sign in screen.

### Edit Your Company Info

The first thing you should do is complete your Public Profile. Select the Company Info tab and click Edit. Ensure all mandatory fields are filled in then click Save.

Your public profile is visible to ALL Coupa customers, not just customers with whom you are connected.

**Add users:**  
You can add users to access your supplier account and perform all tasks:

1. Under Company Info, select User Accounts. Then click on Invite an Employee.
2. Enter the employee's email address in the text box provided and click on Send Invitation. They will receive an email with instructions to activate their account.
3. You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
4. You can delete a user by clicking on the Delete icon under the Actions column.

When enabled for a given customer, a user can access all POs and create Invoices for that customer.

### Configure Customers

Settings for PO delivery Option and Punchout are maintained individually for each customer. You can also setup specific customer profiles:

1. Click on the customer tab (labeled with your customer's name).
2. Edit the information under the Profile section. You can select to compare with other profile to easily copy information across.

**Set PO Delivery Preference:**

1. Under the customer name tab, select PO Delivery.
2. Enter your Email or cXML configuration details. You will still be able to view POs on the CSP.

**Configure Punchout Site:**

1. Under the customer name tab, select Punchout.
2. Enter the customer Punchout configuration details. It will be effective immediately.

If your customer chooses to receive updates, this information is automatically propagated to the customer's Coupa environment.

### View Orders

Regardless of the PO delivery preference set, you will also have access to POs within the Coupa Supplier Portal. To view customer orders:

1. Select the customer name tab, then click on Purchase Orders.
2. Click on the PO# to view the PO.
3. To acknowledge a PO, tick the Acknowledged check box.
4. You can print the PO by clicking on Print View.

### Create Invoice

Providing you have an agreement with your customers to submit paperless invoices, you can create Invoices directly from POs:

1. From the Purchase Order screen, identify the PO that you want to flip into an Invoice.
2. Click on the Create Invoice under the Actions column.
3. Enter the Invoice number in the Invoice # field. This is a mandatory field. You can edit the date, add a copy of your invoice as an attachment, add comments and also edit quantities, shipping, handling and tax fields. Click on Calculate to update the Total.
4. Click on Submit.
5. You can check the status of the invoice under Status once you have submitted it. Invoices are processed automatically and if they meet the criteria set by your customer, they will be approved immediately.

### Manage Catalogs

In order for your customers to buy products or services from you, you need to have an agreed Catalog in place.

1. **Create Catalog:** Click on the customer tab and select Catalogs. Click on Create. You can set start and expiry dates.
2. **Submit Catalog:** When you have included all the items required click on Submit to buyer. This automatically sends a notification to the buyer to review the catalog and approve. You can view the status in realtime in the Catalogs view. Once the catalog is approved, your products and services are immediately available to your customer's employees.

### Tips

#### Creating Invoices

- Even if you generate your own invoices, they will be processed faster if you submit them via the CSP or via cXML and provide your own invoice as an attachment. In Coupa, inbound invoices are processed automatically and those that meet the approval criteria are approved for payment immediately.

#### Managing Catalogs

- Once a catalog is accepted, it cannot be edited. You can create and submit new catalogs to reflect changes in price or product/service offering.

**Does your company have more than one CSP account? Merge them!**

- On your Home page you will see a list of accounts that you can request to merge. Click on Merge. Add a comment in the text box (this will be sent to the other account's owner) and then click Send Request. Have the other account owner log in and on their Home page, click on Merge then Accept on the next screen.

#### MORE INFORMATION

For more resources, visit the Coupa Online Training



# Thank You!

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