Coupa Supplier Portal and Supplier Actionable Notifications User Guide

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Version 4
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A) Coupa Supplier Portal

How to register on portal

- Through the email invitation sent by Veeam (preferred method)

  ![Image of email invitation](image1.png)

- Register directly on the portal via [https://supplier.coupahost.com/](https://supplier.coupahost.com/)

  ![Image of portal registration](image2.png)

- Purchase Order email

  ![Image of Purchase Order email](image3.png)

Note: if you decide to register through option 2: directly through portal or option 3: Purchase Order email in order to finalize your registration your account will have to be linked with Veeam Coupa instance. To do that, please, inform Veeam through Supplier.Enablement@veeam.com email address.
How to create account

Here, we will review how to create your account through Option 1: email invitation sent by Veeam.

Open invitation email sent by Veeam. Click on the “Join Coupa” button as per screenshot below.

Fill in the mandatory fields to provide basic information for your account and your company's public profile. Depending on the version you may be asked for:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Your name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Your last name</td>
</tr>
<tr>
<td>Company</td>
<td>Company’s legal name</td>
</tr>
<tr>
<td>Email</td>
<td>Email address</td>
</tr>
<tr>
<td>Password</td>
<td>Password</td>
</tr>
<tr>
<td>Password Confirmation</td>
<td>Confirm the password</td>
</tr>
</tbody>
</table>

Check “I accept the Privacy Policy and the Terms of Use” check box. 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.

Note: you can forward your invitation to invite other colleagues from your organization any time by entering their email address in the Forward email field and clicking Submit button.

How to Setup Legal Entity

To set up your account to create electronic invoices, click on the “Legal Entity Setup” link on the left of the Admin page and then “Add Legal Entity”.

The Legal Entity page appears. You can add new legal entity or manage, or deactivate existing one.
To add a legal entity, click on the 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 on “Continue” button, and then fill in at least the mandatory fields, marked with a red asterisk (*)

Click “Save & Continue” button.

Keep feeling in mandatory fields
Ensure mandatory fields are complete including “VAT ID” field. If you don’t have a VAT ID field, check “I don’t have VAT/GST number” checkbox and complete “Local Tax ID”.

Complete Banking Information:

Note: it is highly recommended that you fill in your banking details to ensure Veeam has the most recent and up-to-date information.
Follow the instructions to finalize legal entity setup:

Where do you want to receive payment?

- Click "Done" to complete setup process.

Note: you may create multiple “Legal Entities” if you have different currency bank accounts number, or different legal entities which must be paid.
How to login to CSP

Once you have registered you will need to login to portal when you plan to work with it. To do that, input your credentials on the right-hand side to login and click on the “Log In” button.

How to create and / or edit invoice

1. Go to the Orders page

or, on the Invoices page, click on the Create Invoice from PO button above the table to go to the Orders page.

2. On the Orders page, do one of the following:
• Click on the Create Invoice (/button for the PO in the Actions column of the Purchase Orders table.

<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>333</td>
<td>12/03/19</td>
<td>Issued</td>
<td>None</td>
<td>test purchase</td>
<td>No</td>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

• Or click on the PO Number link to open the purchase order and click on the “Create Invoice” button.

3. On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk*) in your invoice (example: Invoice # and Invoice Date):

Note:
1. It is highly recommended that you attach pdf version of your invoice to the electronic one. To do that click on “Add File” in “Attachments” section.
2. Make sure pdf version of invoice is consistent with the Coupa electronic invoice.
3. Never use Image Scan section to attach your pdf document as it will not be available to your business representative in Veeam for validation.

In some other cases the system might propose you to input exchange rate into the corresponding field if the PO currency will be different from the currency your bank should receive.

Some other fields are pre-populated with information from the PO. Check and review this data in the pre-populated fields before proceeding to the next step.

Note:
1. If you have a blanket PO for monthly, quarterly or annual invoices, please don’t forget to adjust “Service Start Date” and “Service End Date” to make sure the service period is reflected correctly.

Ensure you reflect correct amount in the price field. You might face several scenarios:

• When the price on PO is not visible to you

In this case, when you create an invoice just input the price amount in the “price” field to be paid for you based on the agreed scope of work.

Click ”Calculate” button at the bottom of the invoice to ensure the Total price is refreshed

And click “Submit” button to send invoice to Veeam and “Send Invoice” right after
• When the price on PO is visible to you

In this case either accept the full PO amount if you delivered what was agreed as per PO

• Or adjust price in the “price” field if it differs from the original scope

• Click “Calculate” button at the bottom of the invoice to ensure the Total price is refreshed

• Click “Submit” and “Send Invoice” button to send invoice to Veeam.

2. To edit invoice before it was submitted to Veeam, click on the pencil (✏️) icon in the invoice “Actions” section:

Do necessary changes and submit to Veeam or leave for later.

In case you do not need draft of invoice just click on the delete (❌) icon in the invoice “Actions” section.

Note: you can only edit invoices in “Draft” status.
**View and manage invoices**

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

The Invoices table shows the following information:

<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:</td>
</tr>
<tr>
<td>Draft</td>
<td>The invoice has been created, but it has not been submitted to your customer yet.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>The invoice is currently under review by your customer.</td>
</tr>
<tr>
<td>Approved</td>
<td>The invoice has been accepted for payment 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>Something is wrong with the invoice. Contact your customer to get the invoice back on track.</td>
</tr>
<tr>
<td>Disputed</td>
<td>These are invoices with information that Veeam doesn't agree to, needs clarification on, or finds incorrect.</td>
</tr>
<tr>
<td>Abandoned</td>
<td>The disputed invoice has been abandoned if credit note wasn't applied. Veeam can choose to notify you of this invoice status change and provide instructions.</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>
<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.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click on the Edit ( ) or Delete ( ) icon to edit or delete an invoice. You can edit or delete only draft invoices.</td>
</tr>
</tbody>
</table>

To resolve a dispute, click on the relevant button at the bottom of the invoice and select relevant option

Depending on the type of invoice, you have the following options:
• For standard e-invoice
  o “Void”: if an invoice was issued in duplicate or has already been paid for through an earlier invoice, or
  o “Correct” invoice if an invoice has some incorrect information. When submitting a corrected invoice, you can use the same invoice number.

• For country compliant e-invoice
  o “Cancel”: 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.
  Note: The corrected invoice must have a new number.
  o 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.

View and manage Purchase Orders
Click on the “Orders” tab on the main menu. The Orders page with the Purchase Orders table appears.

The Purchase Orders table shows the following information:

<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.</td>
</tr>
<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 does not 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>Issued</td>
<td>The PO was approved and sent to you.</td>
</tr>
<tr>
<td>Soft Closed</td>
<td>The PO is closed but can be reopened. You cannot invoice against a PO in this status.</td>
</tr>
<tr>
<td>Acknowledged At</td>
<td>Date when you acknowledged the receipt of the PO, or &quot;None&quot; if not acknowledged. You can choose to let your customer know that you received their PO by selecting the Acknowledged At checkbox on the PO. When you select the checkbox, the current date appears in the Acknowledged At column.</td>
</tr>
<tr>
<td>Items</td>
<td>List of items on the PO.</td>
</tr>
<tr>
<td>Total</td>
<td>Total amount of the PO.</td>
</tr>
</tbody>
</table>
Click on the icons for the following actions:
- Create (flip the PO into) an invoice 🥗
- Create a credit note 💰

B) Supplier Actionable Notification

Supplier Actionable Notification (SAN) is another way of sending invoices back to Veeam flipped from Purchase Orders. This option is advised in case of one-time business with Veeam (1 or 2 invoices).

How to Create invoice from SAN

1. Before creating invoices via Supplier Actionable Notification (SAN) receive PO from Veeam via email.

2. Open email and click on the blue “Create Invoice” button to create invoice

3. Select the Invoice From address or “Create New Remit-To” if you create invoice for the 1st time:
4. When you select an option “Create New Remit-To” fill in all mandatory fields including Tax ID and banking information

5. Input invoice number, check invoice date and the rest of information

Note: please add pdf version of invoice into the Attachments section via “Add File” option and never use Image Scan for that

6. Adjust the price in the “price” field if applicable

7. Hit “Calculate” button and click on blue “Submit” invoice button
8. Click on “Send Invoice”

C) How to create a Credit Note

In case your original invoice was disputed by Veeam Finance, you will need to create a Credit Note to cancel the invoice.

Note: The electronic credit note must have the same amount as your original invoice, but with negative (minus) price in order to completely cancel the invoice.

To do that, go to your Coupa Supplier Portal account and click on the “Invoices” tab as per screenshot below:

Click on the “Create Credit Note” button and select the applicable Reason, which is “Resolve issue for invoice number”

Click on the drop-down list to select the original invoice # xxxxxx, which needs to be cancelled
Click on “Continue” button and select “Completely cancel the invoice with a credit note” and then click “Create” button.

Or click “Adjust invoice with a credit note” if original invoice amount needs to be reduced.

1. In case you go with a first option such as “Completely cancel the invoice with a credit note”, you will be taken to a Credit Note form, where you’ll need to fill in all mandatory fields (marked with red asterisk) such as: credit note number, credit note date and etc.

Note: It is mandatory that you attach a pdf version of the credit note!

It is important that you first click ‘Calculate’ at the bottom of the form and after the amount is displayed correctly then click the Submit button.

Now you have cancelled the initial invoice by creating a credit note with the same amount. After this step you should be able to recreate your original invoice with the total price.
2. In case you go with the 2nd option such as “Adjust invoice with a credit note”, in addition to the option #1, you will be able to adjust the price on the credit note line level.

Note: It is mandatory that you attach a pdf version of the credit note!

It is important that you first click ‘Calculate’ at the bottom of the form and after the amount is displayed correctly then click the Submit button.

D) How to provide access to new team members in CSP

When you need to provide access to new employees in Coupa Supplier Portal, it can easily be done via “Setup” tab and clicking blue “Invite User” button

In the window which will pop-up just fill in relevant information and check Permissions and Customers and click on blue “Send Invitation” button.
E) How to Request help from Support team

If you encounter technical issues while working with the portal you may request support from the Coupa technical team. To do that just simply click on the “Chat with Coupa Support” window at the bottom right corner.

Ensure that the mandatory data is input in the fields marked with asterisks and click on the blue “Start Chat” button.