

Coupa Supplier Portal – Training deck



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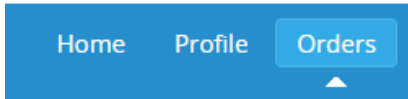


[CSP Tips & Tricks](#)

CSP – Purchase Orders

Purchase Orders - Overview

In Coupa Supplier Portal you will get an insight of all the **Purchase orders** created by ISS users.



Click on the **Orders** tab in the main menu. The Purchase Orders page appears. On this page you will find the information of all Orders created by ISS followed by some general information about them in the table.





Press **blue colored** Order number to dive into the detailed information about it.

Order Statuses:

- **Issued** – Open/active PO – you can issue the **invoices** against it.
- **Soft Closed** – Fully utilised or closed early. Liaise with your ISS contact if closed in error
- **Closed or Cancelled** - – Fully closed unable to amend, unable to amend. Liaise with your ISS contact to obtain a new Order number if closed in error.

Purchase Orders

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
AU0000346208	29/06/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No	60,000.00 AUD		 
AU0000346207	29/06/23	Issued	None	2 Each of Cleaning Machine	No	20,000.00 AUD		 

Purchase Orders – Header Information

PO Header information will provide you with **General** and **Shipping** details about the raised Order like:

Status and delivery method – Please note that even though delivery methods can be different, CSP will always allow you to see full list of Orders raised by ISS

Order date and the Requester – Person who placed the order on behalf of ISS

Payment Terms

Detailed shipping information with all the necessary details about the delivery

Purchase Order #AU0000346209

General Info

Status Issued - Sent via Email

Order Date 29/06/23

Revision Date 29/06/23

Requester Jakub Dziatlik

Email jakub.dziatlik@group.issworld.com

Payment Term [AU]:60D

Supplier Reference None

Attachments None

Acknowledged

Shipping

Ship-To Address 16 FOLEY STREET
BALCATT, WA 6017
Australia
Location Code: AU_005_CU001817_DA1000
Attn: Jakub Dziatlik

Ship to name BALCATT OFFICE

Terms DDP

Shipment Tracking

 Add





No package tracking.

Purchase Orders – Line Information

PO Lines provides detailed information about ordered products/services.

The information you will find in this section consists of **Item/service names**, prices, quantities and **need by** requirements from ISS side.

Lines

Advanced Search  Sort by Line Number: 0 → 9							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Cleaning Machine	2	Each	10,000.00	20,000.00	0.00
* Need By		Supplier Part Number	Manufacturer Name	Manufacturer Part Number			
30/06/23		None	None	None			
2	Type	Item	Qty	Unit	Price	Total	Invoiced
		Carpet Cleaning Machine	2	Each	10,000.00	20,000.00	0.00
* Need By		Supplier Part Number	Manufacturer Name	Manufacturer Part Number			
30/06/23		None	None	None			
3	Type	Item	Qty	Unit	Price	Total	Invoiced
		Washing Machine	2	Each	10,000.00	20,000.00	0.00
* Need By		Supplier Part Number	Manufacturer Name	Manufacturer Part Number			
30/06/23		None	None	None			

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Total AUD **60,000.00**

Purchase Orders – Line Information

On the **bottom of PO page** you will find two important buttons

Create Invoice – This will allow you to automatically create the Invoice against this Order. Read more about it in Invoicing section.


Print View – It opens html generated Purchase order Print view presenting all the detailed information about this specific Order

Total AUD **60,000.00**

Create Invoice Save Print View

issworld-test.coupahost.com/supplier_order_headers/show_custom/346209?supplier_id=0&version=1 - Google Chrome

issworld-test.coupahost.com/supplier_order_headers/show_custom/346209?supplier_id=0&version=1

 P2P@ISS TEST

**ISS Health Services Pty Limited
PURCHASE ORDER**

[AU] Supplier Portal
Stanley Street Plaza
South Brisbane, 4101
PO EMAIL: kuba.dziatlik+csp@gmail.com
Attn: Portal Training
kuba.dziatlik+csp@gmail.com
+1 (650) 555-1212

PO NUMBER AU0000346209
DATE 29/06/23
PAYMENT TERMS [AU]:60D - Net 60 Days from Invoice Date
CURRENCY AUD
SHIPPING TERMS DDP
CONTACT Jakub Dziatlik
EMAIL jakub.dziatlik@group.issworld.com

Ship To
ISS Health Services Pty Limited
16 FOLEY STREET
BALCATT, WA 6017
AU_005_CU001817_DA1000
Attn: Jakub Dziatlik

Bill To
ISS Health Services Pty Limited
Level 6/ 1 Thomas Holt Drive
Macquarie Park, NSW 2113
Attn: Accounts Payable
ABN: 98 109 689 223

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Cleaning Machine	30/06/2023	2	Each	10,000.00	20,000.00
2	Carpet Cleaning Machine	30/06/2023	2	Each	10,000.00	20,000.00
3	Washing Machine	30/06/2023	2	Each	10,000.00	20,000.00
						60,000.00 AUD

- Please find full Terms & Conditions [here](#).
- Invoices should be submitted via the [Coupa Supplier Portal](#).
- Further details on invoicing ISS can be found [here](#).

CSP – Invoices

Invoices - Overview

Invoices

Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
Test1	29/06/23	Pending Approval	AU0000346208	66,000.00 AUD	No		

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The **Invoice** tab is where your invoices submitted to ISS are located.

You can create an invoice directly in this tab by choosing Create Invoice from PO or directly from PO view mode.

Invoice status and real-time payment information:

Draft – Invoices that have been created but haven't been submitted by you to ISS yet.

Pending Approval – Invoices that have not been approved by ISS yet

Processing – Invoices that are being processed by ISS Accounts Payable department

Approved – Invoices that have been accepted for payment by ISS

Paid – Invoice has been paid by ISS

Overdue – Invoices that have not been paid yet and are past the due date

Disputed – Invoices that you or ISS have marked as disputed to indicate an invoice discrepancy

Invalid – The disputed invoice has been abandoned. ISS may notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.

Invoices – Payment Information

In the **Invoice** tab you can review real-time payment information.

By choosing the **Payment Information** view you will be prompted to a different view of all your invoices where you can verify when to expect payment. Payment Information column will be populated with the expected payment date once invoice is approved and posted on ISS end.

Invoices




Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to 		View		Payment Information 		Search 	
Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	AU0000346208	Test1	Pending Approval	29/06/23	[AU]:60D	29/06/23	

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Invoices – CSP as E-Invoicing solution

Coupa E-Invoicing is designed to enable compliance with regulatory requirements imposed on sending / receiving electronic invoices by the respective tax jurisdictions in the aforementioned supported countries.

For Coupa compliant e-invoicing countries, as per the T&Cs, Coupa will issue the legal invoices on your behalf. Please do not attach or issue to ISS a copy of an invoice generated from your system.

Invoice #Test1 [Back](#)



General Info

Invoice # Test1
Invoice Date 29/06/23
Payment Term [AU]:60D
Delivery Date 29/06/23

Bill To & Ship To

Supplier [AU_NAV] [AU_Supplier Portal (V0067476)]
Invoice From Trainin
Street1
Melbourne, 12345
Australia

Go to the **Invoice** tab and click the **Create Invoice from PO** button or use the **Create Invoice** button in the bottom section of the PO to generate Invoice creation window.

Purchase Orders

Click the  Action to Invoice from a Purchase Order

Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
AU0000346209	29/06/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No	60,000.00 AUD		
AU0000346208	29/06/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No	60,000.00 AUD		
AU0000346207	29/06/23	Issued	None	2 Each of Cleaning Machine	No	20,000.00 AUD		

Invoices – How to create and submit invoice

Populate the fields on the invoice as per below instructions.

Submit the invoice.

Total AUD **60,000.00**

Create Invoice

Save

 Print View

Invoices – How to create and submit invoice

All asterisk (*) marked fields are mandatory.

General info:

- **Invoice#** - Invoice number from your ERP/Accounting system
- **Attachments** – Consider these as supporting documentation. Compliant legal invoice document will be generated based on invoice details you will submit

From:

Predefined from your **account setup**. Please however **review** if all the details are correct.

To:

Predefined by the information delivered with **Purchase Order**

The screenshot shows a 'Create Invoice' form with two main sections: 'General Info' and 'From'. The 'General Info' section includes fields for Invoice #, Invoice Date (29/06/23), Payment Term (HQ:30 DAGE), Date of Supply (29/06/23), Currency (AUD), Delivery Number, Status (Draft), and Supplier Note. The 'From' section includes Supplier (AU_NAV [AU_Supplier Portal (V0087478)]), Supplier ABN (9999999999), Invoice-From Address (Trainin Street1 Melbourne, 12345 Australia), Remit-To Address (Trainin Street1 Melbourne, 12345 Australia), Bank Name (Bank), Beneficiary Name (Trainin), Bank Account Number (****5678), SWIFT Code (*****2345), BSB (**3456), and Ship-From Address (Trainin Street1 Melbourne, 12345 Australia). Below the 'From' section is the 'To' section, which includes Customer (ISS TEST), Bill-To Address (ISS Health Services Pty Limited, Level 6/ 1 Thomas Holt Drive, Macquarie Park, NSW 2113, Australia), Ship to name (None), Buyer ABN (98109889223), Ship To Address (Kauno g. 55, LT-21371 Vievis, Lithuania, Location Code: LT10037_1), and Ship to name (None).

Invoices – Important Notes

- Please note that it is important the **VAT rate** is correct in terms of the supplies being made and the place of supply for tax purposes.
- Please note that for Coupa **compliant e-invoicing** countries you **must not** attach or issue to ISS a copy of an invoice generated from your system. Recommendation is to use attachment fields to enrich invoice with additional documentation.
- Please note you must **not add a new line** when creating the invoices, as this will cause **failure** in the auto-matching of the PO and the invoice.
- Please note that ISS does not process **disputed** invoices for payment until you resolve the dispute. Once the invoice is disputed you will receive the **e-mail notification** as well as the Invoice will change the status to **Disputed** in CSP. Resolving of **Disputed** invoices is done by issuing **Credit Note**

Credit Notes – Submission

You can issue a credit note to:

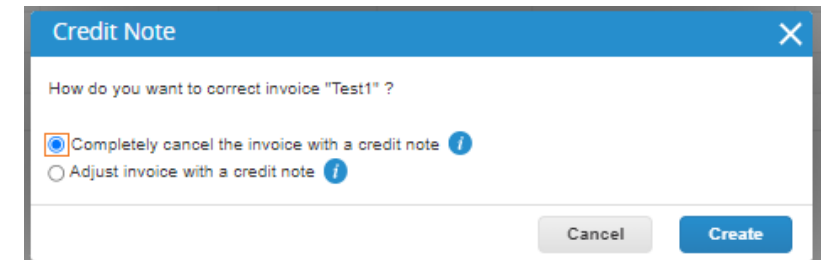
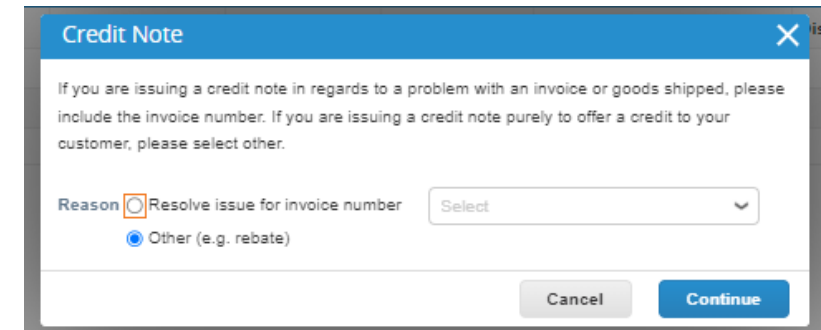
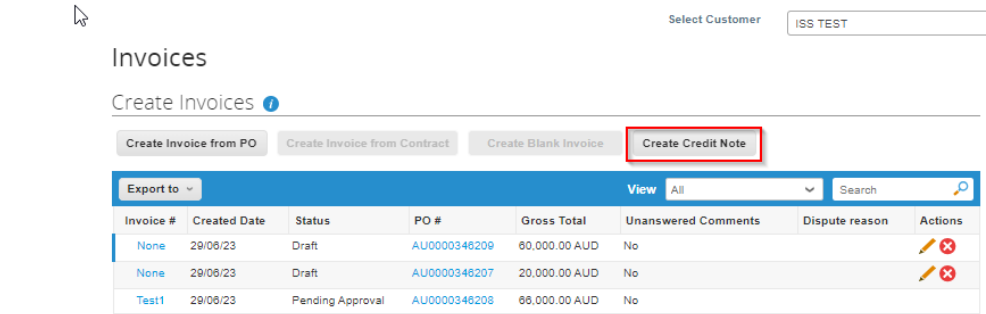
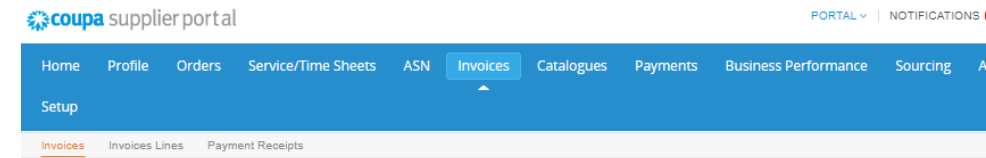
Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice.

Record miscellaneous credit, for example, **return/cancellation** of goods, **price adjustments**, **rebates** and refunds.

By selecting the option **Resolve issue for invoice number** you will automatically create a **link** between both documents what will help the system to offset them.

Selecting other options will require your manual action on editing fields like **quantities** for **Item based** invoices or **amount** on **service based** invoices.

To **complete the submission** please follow the exact same steps as you do for **invoice submission**.



CSP – Tips and Tricks

Comments – communication channel



In the bottom section of both objects: **Purchase orders** and **Invoices** you will find **Comments** chat window.

This feature will **simplify and speed up** your communication with ISS. You can utilize it to ask some **questions** or to make **additional clarifications** on documents. ISS users will get notified once you will insert a comment and will **react accordingly**.

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Total AUD **60,000.00**

[Create Invoice](#) [Save](#) [Print View](#)



 **Comments** [Mute Comments](#) 

Enter Comment

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

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

[Add Comment](#)

 **History** 

Setup - Notifications

This is **you** who decide when and how to be prompted once actions are taken in Coupa.

Press your **name** on the top right corner and select **Notification Preferences**

You will find entire list of different notification possibilities through three channels: **Online** (directly on the platform), **Email** and **SMS**.

Main ones will be **preselected**, but you can manipulate the options to **fit for your purposes** in the best way

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email kuba.dziatluk+esp@gmail.com **Mobile (SMS)** +1 201-555-5555 **Verify**

⚠️ Verify number to receive SMS

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Business Performance

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Catalogues

New comment received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Community

Community Role Given to User	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
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Coupa Accelerate

New Early Pay Customer	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
------------------------	--	---	------------------------------

Coupa Pay

Setup – Users and Permissions

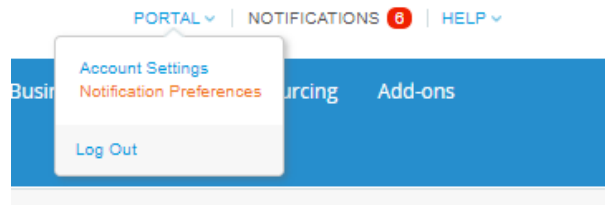
In CSP you can maintain the access to the platform by your own.

Invite other users from your company and grant permissions to utilize the product in the best way.

Go to **Setup** on the main tab and select **Users** section.

Press **Invite user** button to **Edit** button next to created user to adjust the account.

Fill out the **names** and grant **permissions** to **objects** and **customers**.



Invite User

First Name

Last Name

* Email

Permissions ?

- All
- Admin
- Orders
 - Restricted Access to Orders
 - All
- Invoices
- Catalogues
- Profiles
- ASNs
- Service/Time Sheets
 - Restricted Access to Service/Timesheets
 - All
- Payments
- Order Changes
- Early Payments
- Business Performance
- Sourcing
- Order Line Confirmation

Customers

- All
- ISS TEST

Reporting and Table views

For Each of these Main Objects: **Catalogs**, **Orders** and **Invoices** there will be a lot of information available in the system.

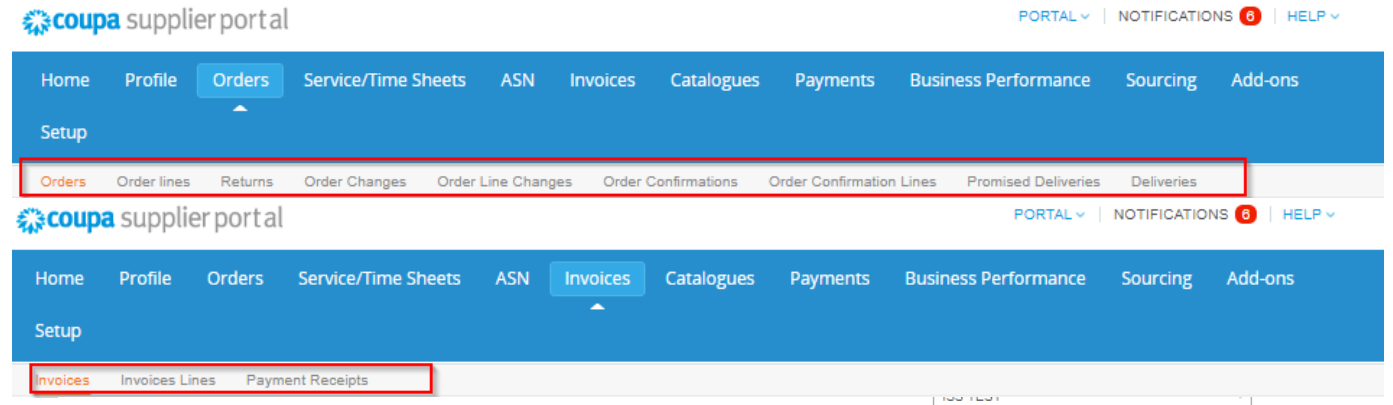
You can **download** reports, **create views** or make a use of the **standard views** created for you.

Under the main tabs of **Orders** and **Invoices** there will be more tables offering different information. Most common ones are:

For invoices: **Invoices** and **Invoice Lines**

For orders: **Orders** and **Order Lines**

Every single table has their own **standard predefined views** which can help you a lot to see the information you will most of the times be looking for.



Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to	View	All	Search
		All	
		Confirmations Awaiting Buyer Review	
		Open Orders	
		Orders not acknowledged	
		Orders not invoiced	
		Orders overdue	
		Orders Pending Confirmation	
		Orders with pending changes	
		Overdue Confirmations	
		POs Pending Rework	
		POs with service lines	
		Create View	

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Con	Order To	Actions
AU0000346209	29/08/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No		
AU0000346208	29/08/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No		
AU0000346207	29/08/23	Issued	None	2 Each of Cleaning Machine	No		

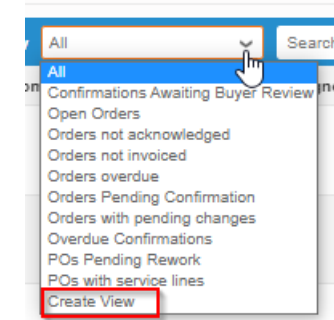
Reporting and Table views

Still going deeper into the details it's obvious that sometimes there will be a need to build more detailed **custom views** based on **conditions** and **filters**.

Press **Create View** to design the report that you need.

All you need to do is to:

- Name your view
- Add conditions
- Drag the **Columns** to build the table your way



Create New data table view

General

Select Customer

Name

Visibility Only Me Everyone

Start with view

Conditions

Match Conditions

Filter By is

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

Available columns	Selected columns
Payment Agreements	PO Number
Acknowledged At	Order Date
PO ID	Status
Unanswered Comments	Total
Items	Assigned To
	Actions
	Comments

Reporting and Table views


Finally you can at any time **Export** the data from **CSP tables** in one of these formats:

CSV










XLSX

Select Customer | ISS TEST

Purchase Orders

Click the  Action to Invoice from a Purchase Order

Export to | View | Create View | Search

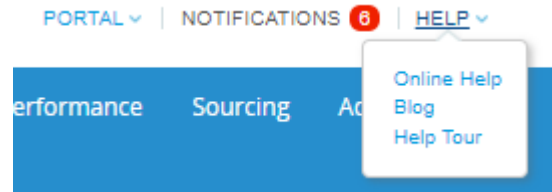
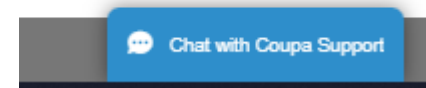
		Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
		Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No	60,000.00 AUD		  
AU0000346208	29/06/23	Issued	None	2 Each of Cleaning Machine 2 Each of Carpet Cleaning Machine 2 Each of Washing Machine	No	60,000.00 AUD		  
AU0000346207	29/06/23	Issued	None	2 Each of Cleaning Machine	No	20,000.00 AUD		  

Coupa Support Chat

At anytime with if you will have some issues using the Portal, you can use the **Coupa Support chat** which is embedded into the platform or support yourself with the **Help Tour** guide.

Chat is available for you in bottom right corner

Help tour can be found next to your name in top right corner



Chat with Coupa Support

* First Name * Last Name

* Email

Phone

* Issue Related To

Subject to Coupa [Terms of Use](#) and [Privacy Policy](#).

Start Chat

Purchase Orders are Listed by Customer

- 1 Choose your customer at the top right
Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.
- 2 Create invoices from POs
Act or invoice from a PO Use the actions in the table or on the PO to manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected action is not available to you.

Got It

