



Supplier Coupa Training

Supplier

August 2019

Supplier Training

1. Get Started with the CSP

- Register for the CSP
- Create Your Account
- Log in to the CSP
- Manage your Account

2. Working with the CSP

- Create an Invoice from a PO
- Create a Credit Note
- Viewing and Editing an Invoice
- Creating a Non-PO or Contract Based Invoice
- Invoice Statuses
- View and Manage POs
- Purchase Order statuses
- View PO Lines
- .

3. Administer the CSP

- Admin Page
- Manage Users
- Set up E-Invoicing
- View Remit-to Information

4. Sourcing Events

- How Suppliers Participate in Events
- Supplier Participating in Live Auction

Supplier on-boarding process



Your KPMG contact will request you to submit an internal request to register you as a new supplier.



Once approved, you will be set up in the Procure-to-Pay (P2P) system (Coupa).



You will then get an email, inviting you to log into Coupa and complete the registration process through the Coupa Supplier Portal (CSP).



Once you have registered onto CSP, you are ready to go.



You are ready to do business

Benefits of the Procure-to-Pay (P2P) system



Fast and Easy

Registering and setting up to do business becomes easy



Payments

Payments are faster and on time



Communication

Keeping suppliers informed at all times



Transparency

Visibility on all your invoice and orders

Get started with the CSP

Customer-created invitation

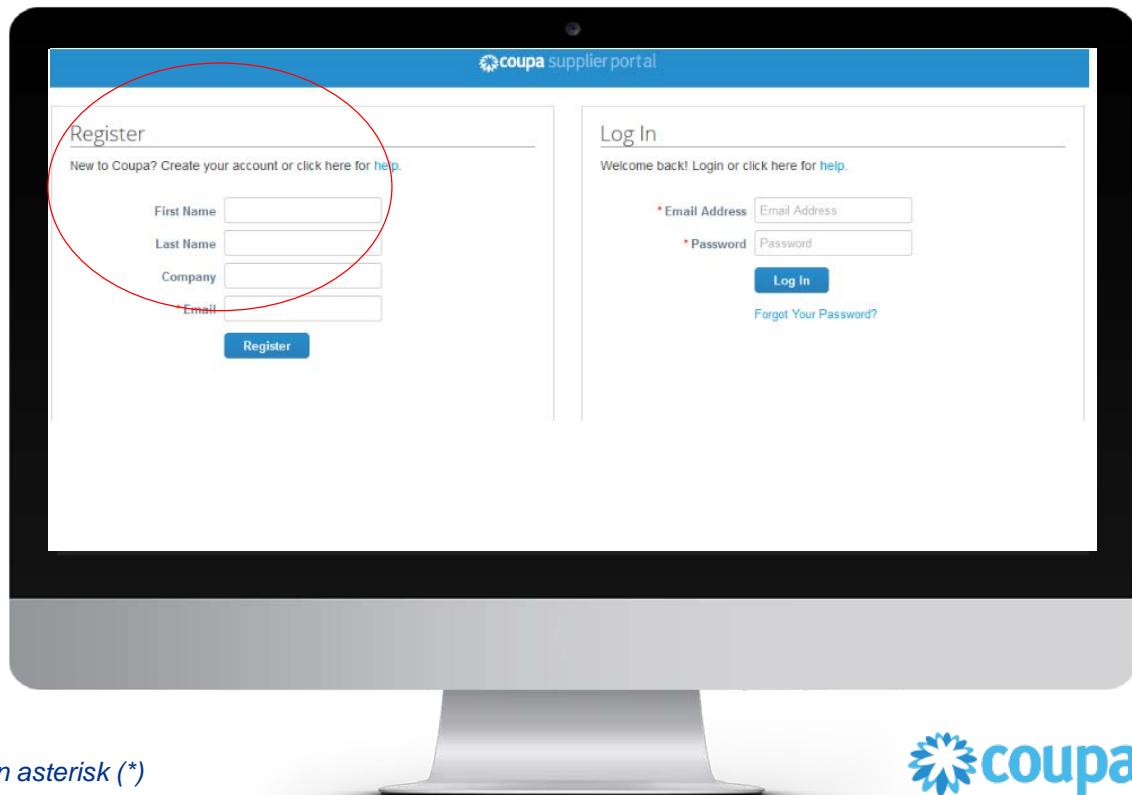
1. If your client has the correct email address, they will send you an invitation to your email to register on the Coupa Supplier Portal



Get started with the CSP

Self-created invitation

1. Go to Supplier.couphahost.com and in the **Register** pane on the left, fill in the fields. Mandatory field are marked with an asterisk
2. Once done, you will receive an email with a link to validate your information and create your account

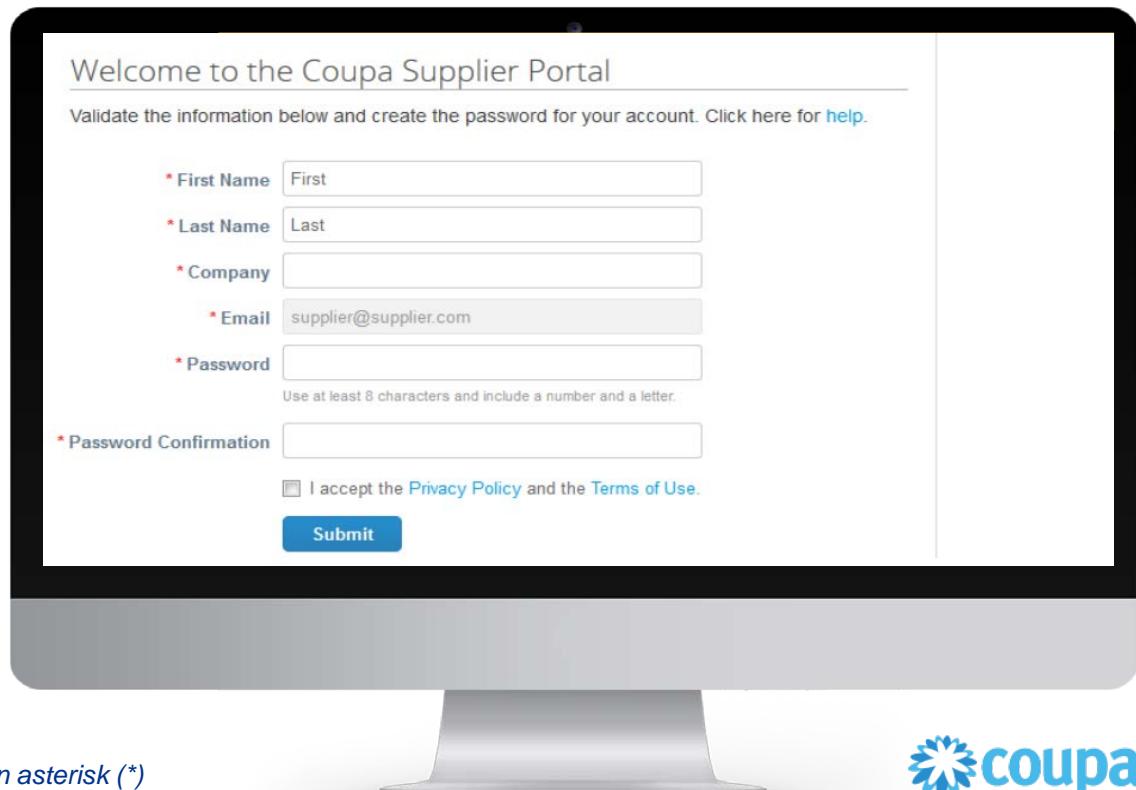


Required fields are marked with an asterisk (*)

Get started with the CSP

1. Once registered, you'll receive a link in your email to confirm and direct you to a page to fill out the rest of the mandatory fields
2. Here's where you input your basic information for your account and your company's public profile

Create your account



Welcome to the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* 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](#).

Submit



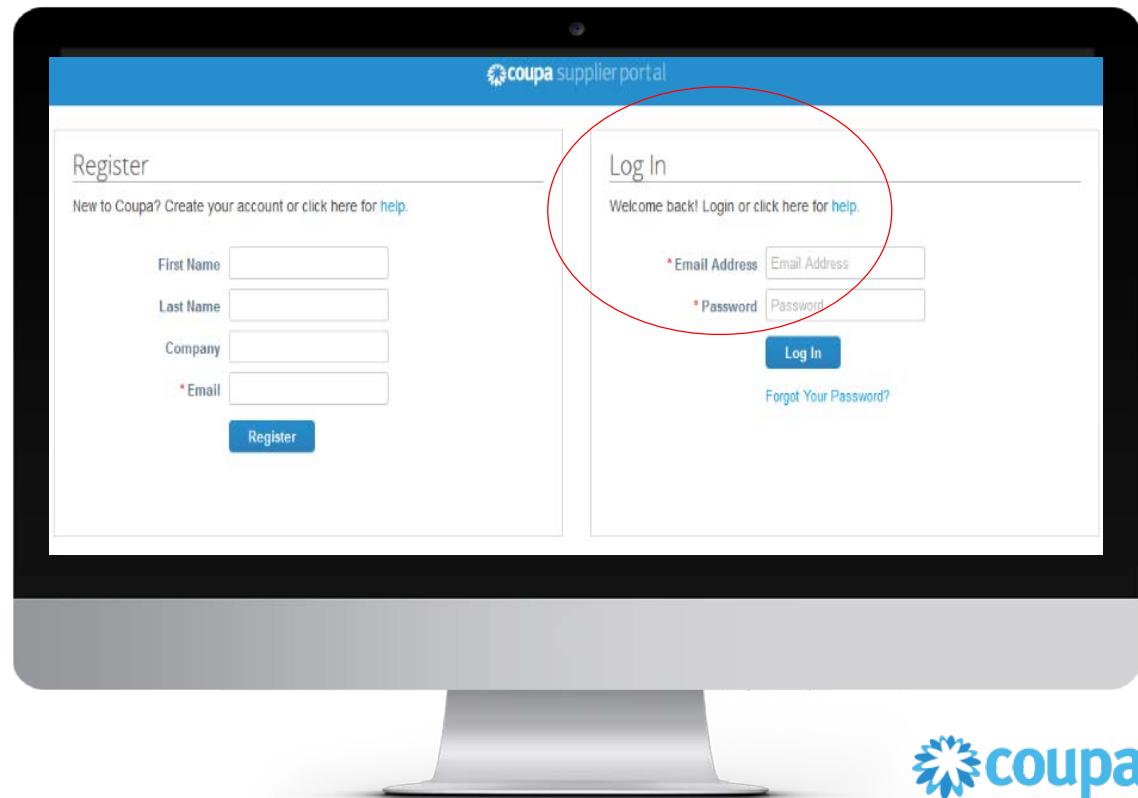
Required fields are marked with an asterisk (*)



Get started with the CSP

Log in to the CSP

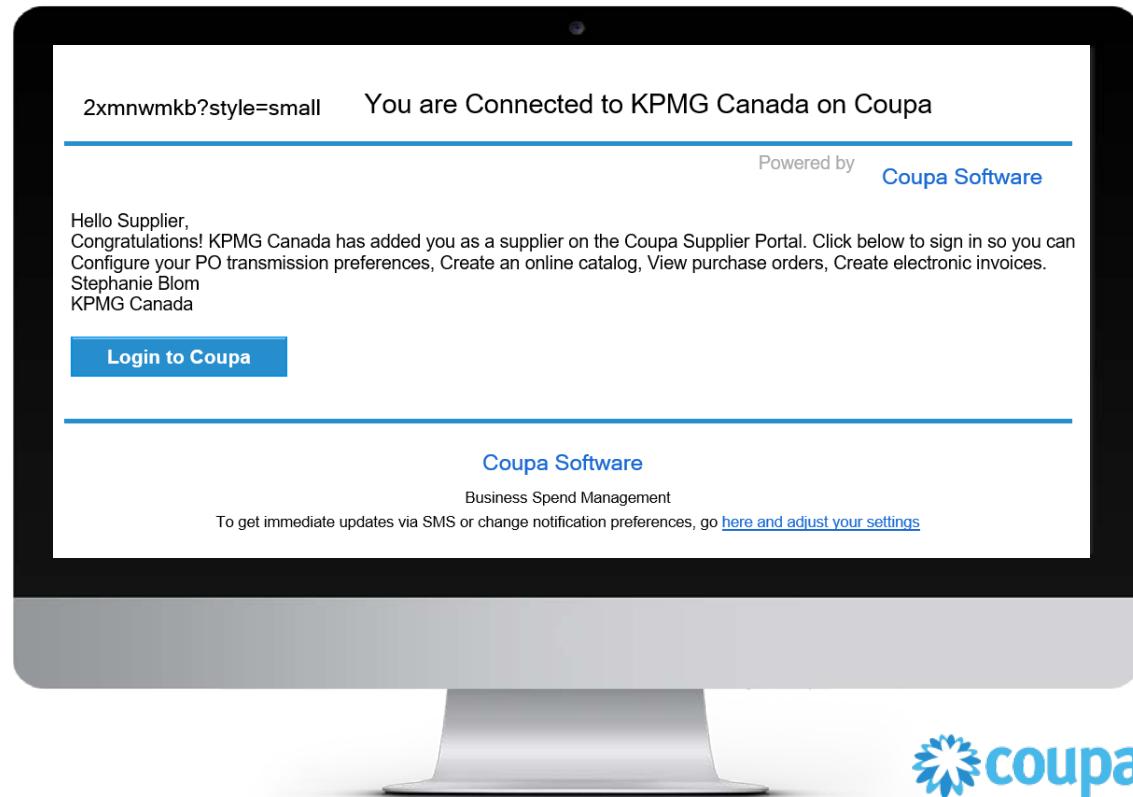
1. Go to supplier.couphost.com and **Log in** pane on the right, enter your email address and password and click **Log In**.
2. You should be able to now log in after registering



Get started with the CSP

Log in to the CSP – Existing Supplier

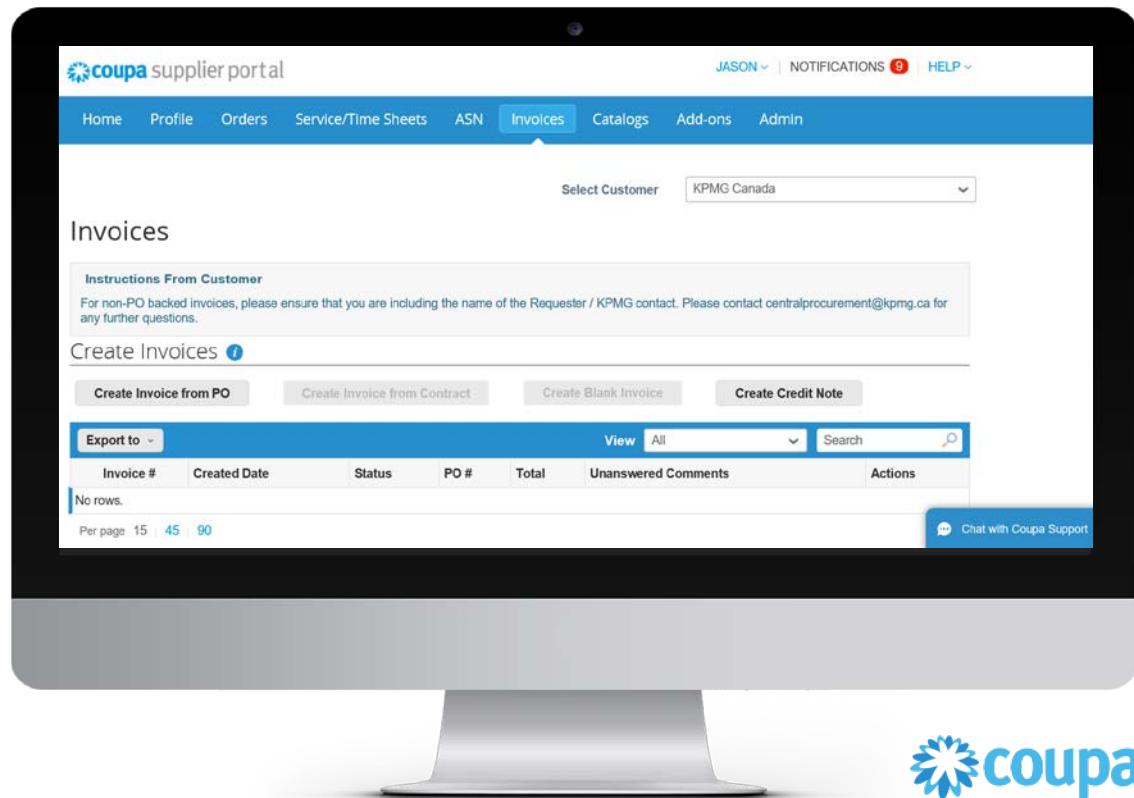
1. If you already have an account set up on the CSP you will receive an email saying that you are connected to KPMG Canada on Coupa.
2. Click on 'Login to Coupa' and follow your regular login process of inputting your email and password.



Get started with the CSP

Log in to the CSP – Existing Supplier

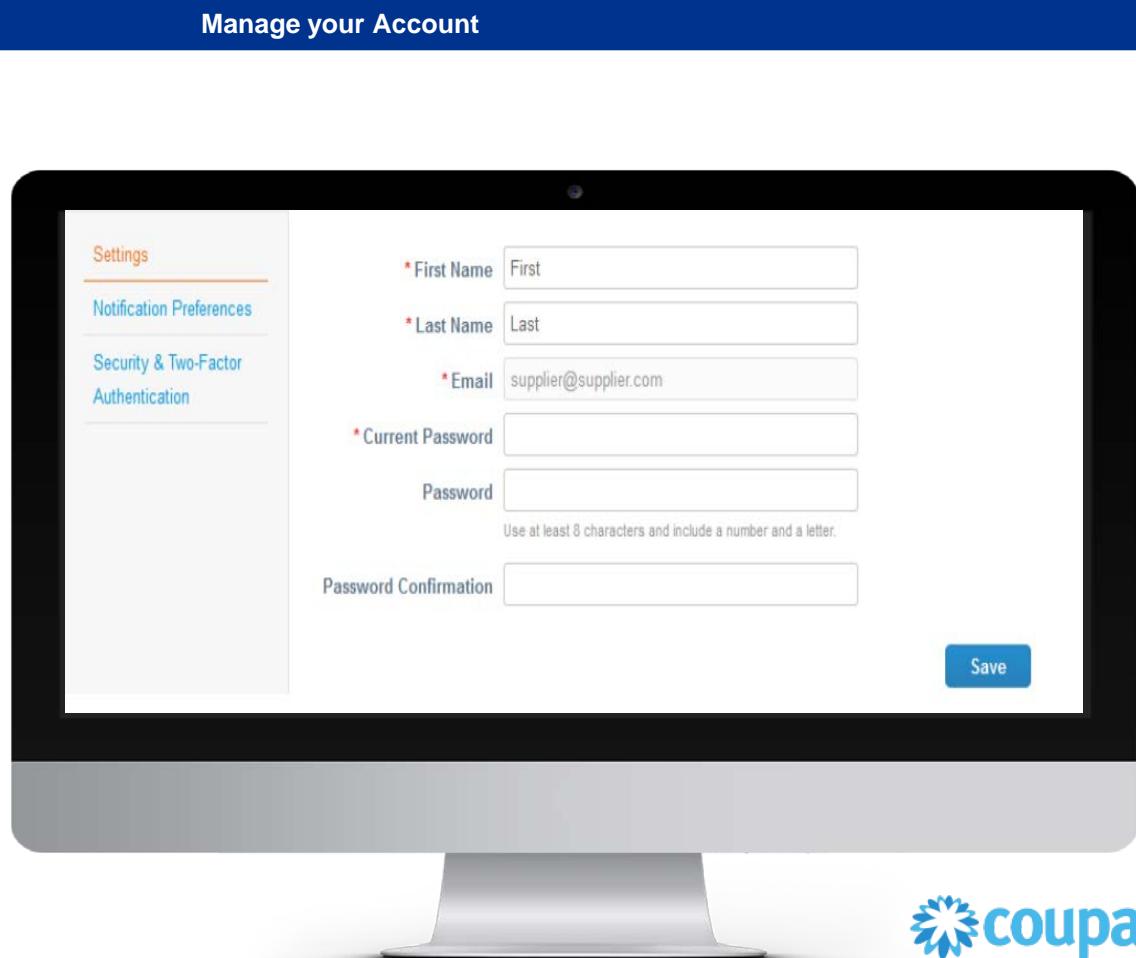
3. When viewing Invoices and Orders you will now be able to see KPMG Canada as a customer along with all of your existing customers.



The image shows a screenshot of the Coupa supplier portal on a desktop monitor. The portal has a blue header with the Coupa logo and the text 'coupa supplier portal'. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (which is highlighted in blue), Catalogs, Add-ons, and Admin. A dropdown menu 'Select Customer' is open, showing 'KPMG Canada' as the selected option. Below the header, the word 'Invoices' is displayed in a large, bold font. A sub-section titled 'Instructions From Customer' contains a note: 'For non-PO backed invoices, please ensure that you are including the name of the Requester / KPMG contact. Please contact centralprocurement@kpmg.ca for any further questions.' Below this is a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table header for 'Invoices' is shown, with columns for 'Invoice #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', and 'Actions'. A message 'No rows.' is displayed below the table. At the bottom of the table area, there are buttons for 'Per page: 15 | 45 | 90' and a 'Search' bar. A 'Chat with Coupa Support' button is located in the bottom right corner of the table area. The monitor sits on a silver desk stand, and the Coupa logo is visible in the bottom right corner of the slide.

Get started with the CSP

1. Once you **Log In**, you can manage your account under **My Account** by clicking your name link and then on the **Account Settings** link.
2. Here you can make changes to your personal information (name, photo, and password), set or modify your notification preferences, etc.



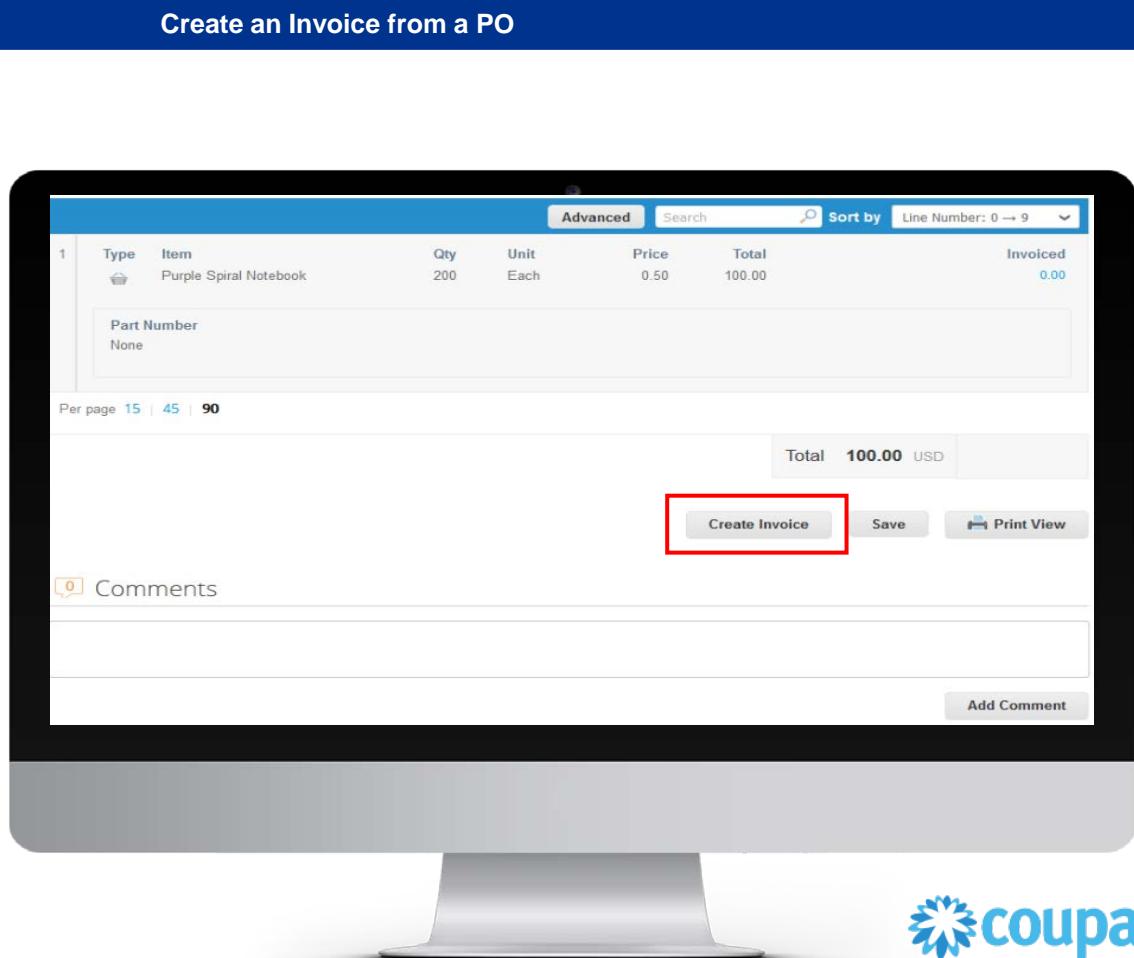
➔ You can access and edit your company information on the **Profile** page



Working with the CSP

1. Log in to CSP and click on the Orders Tab
2. To flip a PO into an invoice, do one of the following:
 1. Click on the **Create Invoice icon** (✉) for the PO in the **Purchase Orders** table
 2. Click on the **PO Number** link to open the purchase and click on the **Create Invoice** button
3. When creating the invoice, fill in all necessary fields including mandatory fields marked with red asterisk.

Create an Invoice from a PO



	Type	Item	Qty	Unit	Price	Total	Invoiced
1	PURPLE SPIRAL NOTEBOOK	Purple Spiral Notebook	200	Each	0.50	100.00	0.00

Part Number
None

Per page: 15 | 45 | 90

Total: 100.00 USD

Create Invoice **Save** **Print View**

Comments: 0

Add Comment



By 'flipping' the PO to an invoice directly on CSP will pre-populate most of the fields, hence making it easy and accurate

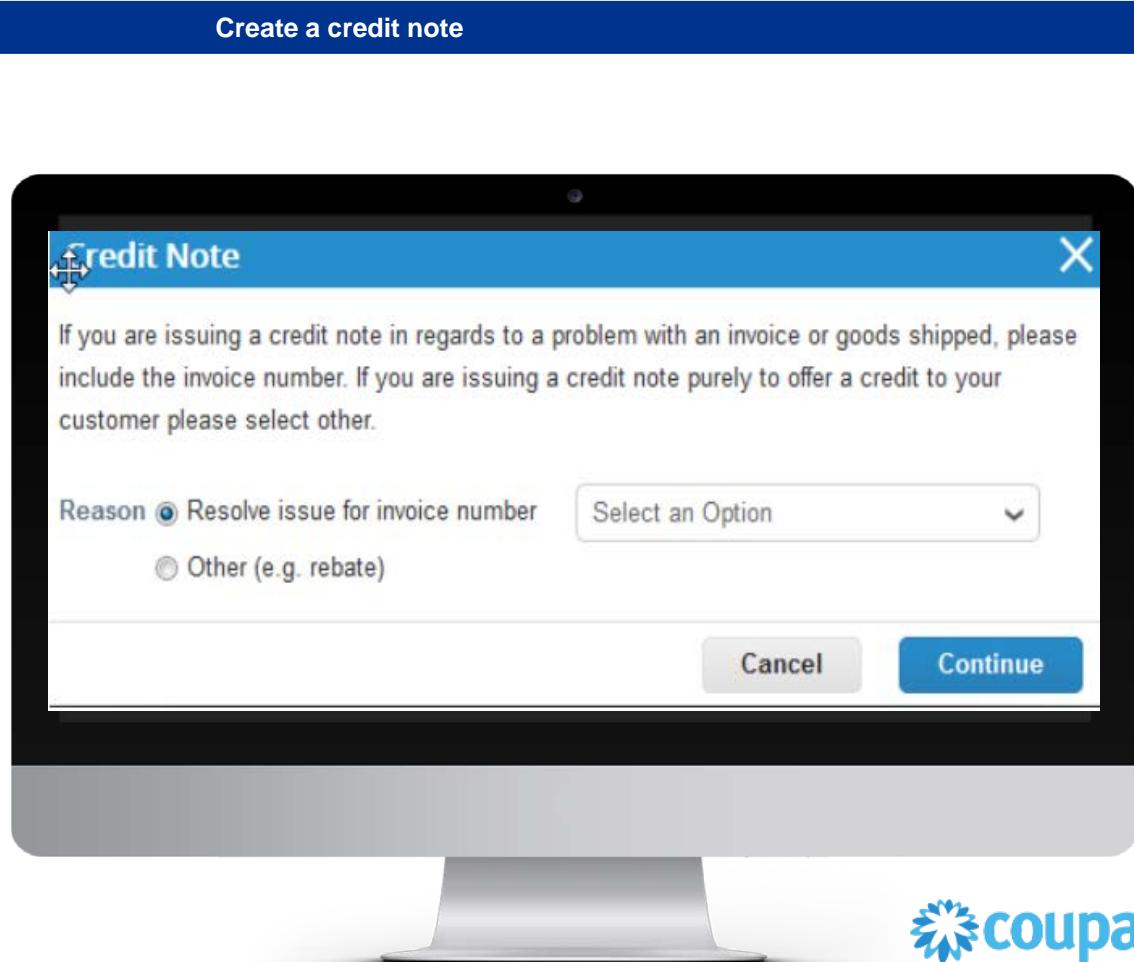


Working with the CSP

1. You can issue a credit note when you want to:

- a. Resolve a dispute on an invoice
- b. Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds

2. To create a credit note, click on the **Credit note** button under the **Invoices** table on the **Invoices** page
3. In the appearing **Credit Note** popup, select the reason for your credit note



Similarly to creating an invoice, you can create a credit note by clicking on the **Create Credit Note Icon**  for the PO in the

Actions column of the **Purchase Order** table

Working with the CSP

Viewing and Editing an Invoice

1. To edit a draft invoice, do one of the following:
 - a. Click on the **Edit** (✎) icon for the invoice in the **invoices** table.
 - b. Click on the **Invoice #** link to open the invoice and click the **Edit** button at the bottom of the invoice screen

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
without_checks_failed	07/30/18	Pending Approval	174	1,300.00 CAD	No	
None	07/30/18	Draft	174	800.00 CAD	No	
inv_tolerances_testing	07/30/18	Pending Approval	173	1,200.00 CAD	No	
inv_remit_to	07/27/18	Pending Approval	None	2,000.00 USD	No	
remit_to	07/26/18	Pending Approval	None	2,500.00 USD	No	
inv_1234	07/23/18	Approved	None	2.50 CAD	No	
EmoTest1234	07/23/18	Approved	None	2,000.00 CAD	No	
uat_bev_inv_42	07/23/18	Pending Approval	None	2,000.00 CAD	No	
Test_test_123	07/20/18	Pending Approval	162	5,000.00 CAD	No	
uat_bev_inv_33	07/20/18	Pending Approval	152	800.00 CAD	No	
uat_bev_inv_32	07/20/18	Pending Approval	159	5,000.00 CAD	No	
Split_Billing_Inv	07/19/18	Approved	152	904.00 CAD	No	
Non_PO_Line_Level	07/19/18	Pending Approval	None	1,664.75 USD	No	
Non_PO_ON_Tax	07/19/18	Pending Approval	None	1,130.00 USD	No	
Line_Level_tax_ON_OC	07/19/18	Approved	151	1,529.83 CAD	No	



When creating an invoice against a contract, you must first select the contract from drop-down list

Working with the CSP

Creating a Non-PO or Contract Based Invoice

1. 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 on the **Invoices** page and click **Create**.



The status column allows the supplier to have up-to-date status on their invoices

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
without_checks_failed	07/30/18	Pending Approval	174	1,300.00 CAD	No	
None	07/30/18	Draft	174	800.00 CAD	No	
inv_tolerances_testing	07/30/18	Pending Approval	173	1,200.00 CAD	No	
inv_remit_to	07/27/18	Pending Approval	None	2,000.00 USD	No	
remit_to	07/26/18	Pending Approval	None	2,500.00 USD	No	
inv_1234	07/23/18	Approved	None	2.50 CAD	No	
EmoTest1234	07/23/18	Approved	None	2,000.00 CAD	No	
uat_bev_inv_42	07/23/18	Pending Approval	None	2,000.00 CAD	No	
Test_test_123	07/20/18	Pending Approval	162	5,000.00 CAD	No	
uat_bev_inv_33	07/20/18	Pending Approval	152	800.00 CAD	No	
uat_bev_inv_32	07/20/18	Pending Approval	159	5,000.00 CAD	No	
Split_Billing_Inv	07/19/18	Approved	152	904.00 CAD	No	
Non_PO_Line_Level	07/19/18	Pending Approval	None	1,664.75 USD	No	
Non_PO_ON_Tax	07/19/18	Pending Approval	None	1,130.00 USD	No	
Line_level_tax_ON_GC	07/19/18	Approved	151	1,529.83 CAD	No	



When creating an invoice against a contract, the supplier must first select the contract from drop-down list

Working with the CSP

Invoice Statuses

Invoices can have the following statuses

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

Working with the CSP

View and Manage POs

1. Click on the **Orders** tab on the main menu. The **Purchase Orders** page appears.
2. Under the **Purchase Orders** the supplier can see a table with all purchase orders received.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
175	08/07/18	Issued	None	1 Each of ThinkPad X1 Yoga 260	No	800.00 CAD	
174	07/30/18	Issued	None	1 Each of ThinkPad X1 Yoga 260	No	800.00 CAD	
173	07/30/18	Issued	None	1 Each of ThinkPad X1 Yoga 260	No	800.00 CAD	
168	07/23/18	Issued	07/24/18	5 Each of ThinkPad X1 Yoga 260	No	4,000.00 CAD	
167	07/23/18	Issued	None	consulting service	No	1,000.00 CAD	
166	07/23/18	Issued	None	Consulting Service	No	1,000.00 CAD	



Directly from the **Purchase Orders** table, you can flip the POs to invoices or create a credit note.



Working with the CSP

Purchase Order Statuses

Purchase orders can have the following statuses

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Canceled	The PO is cancelled and doesn't need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	There's something wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.



Working with the CSP

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

View PO Lines

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
175	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00
174	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00
173	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00
168	1	Issued	5 Each of ThinkPad X1 Yoga 260	5	4000.00
167	1	Issued	consulting service	None	1000.00
166	1	Issued	Consulting Service	None	1000.00
165	1	Issued	1 Each of CONSULTING SERVICES	1	1000.00
162	1	Issued	Consulting Service	None	5000.00
159	1	Issued	1 Each of consulting services	1	5000.00
152	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00
151	2	Issued	1 Each of Microsoft Touch Pad L260 Pro	1	575.25
151	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00
149	1	Issued	1 Each of ThinkPad X1 Yoga 260	1	800.00

19

Administer the CSP

1. On the **Admin** page you can manage users, remit-to addresses set up electronic invoicing and much more
2. To access the Admin Page, click on the **Admin** Tab

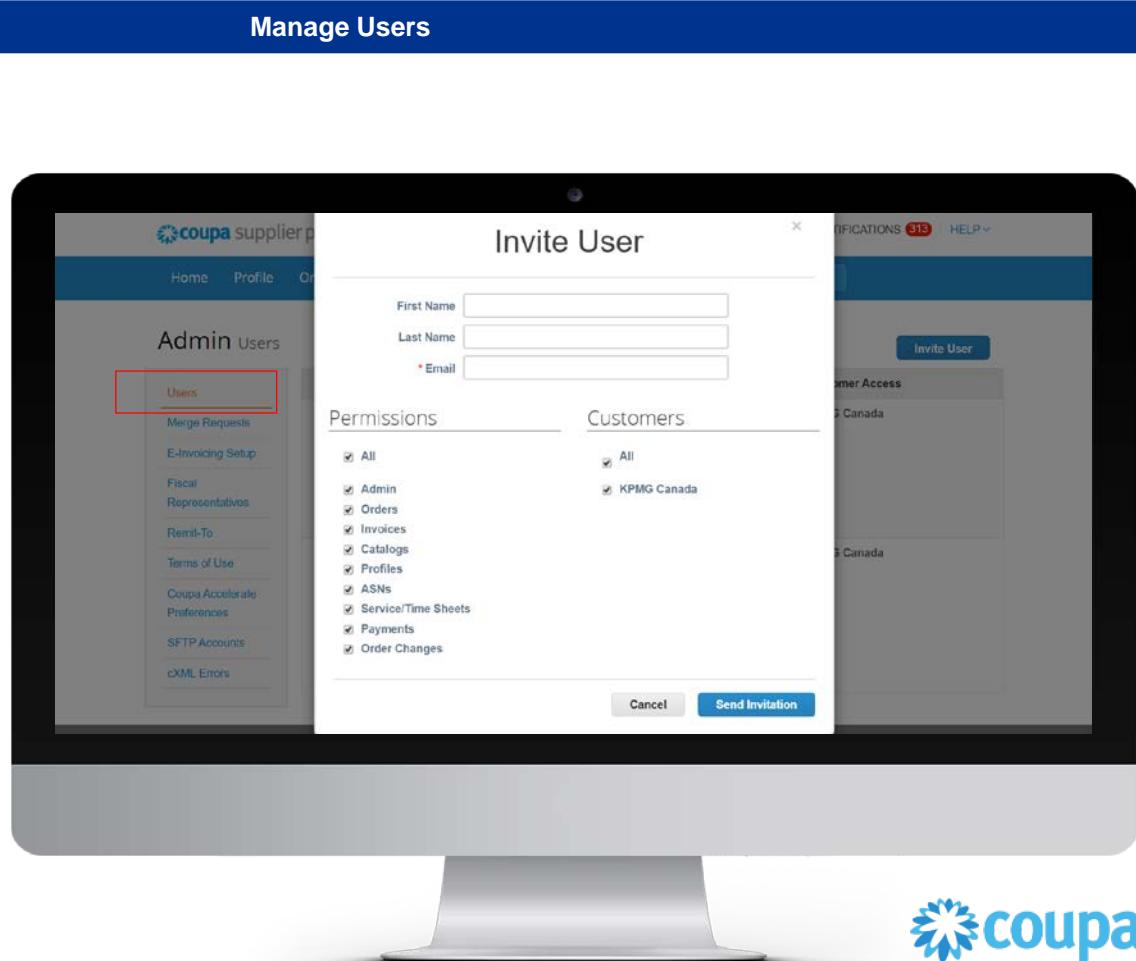
The screenshot shows the Coupa supplier portal interface on a computer monitor. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. The Admin link is highlighted with a blue box. The main content area is titled "Admin Users". On the left, a sidebar lists various administrative settings: Users (highlighted with an orange underline), Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate, and Preferences. The main table displays one user entry:

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Coupa

A blue "Edit" button is located below the user entry. In the top right corner of the monitor, there are links for "SUPPLIERNAME" (with a dropdown arrow), "NOTIFICATIONS" (with a red notification icon), and "HELP" (with a dropdown arrow). The bottom right corner of the monitor features the Coupa logo.

Administer the CSP

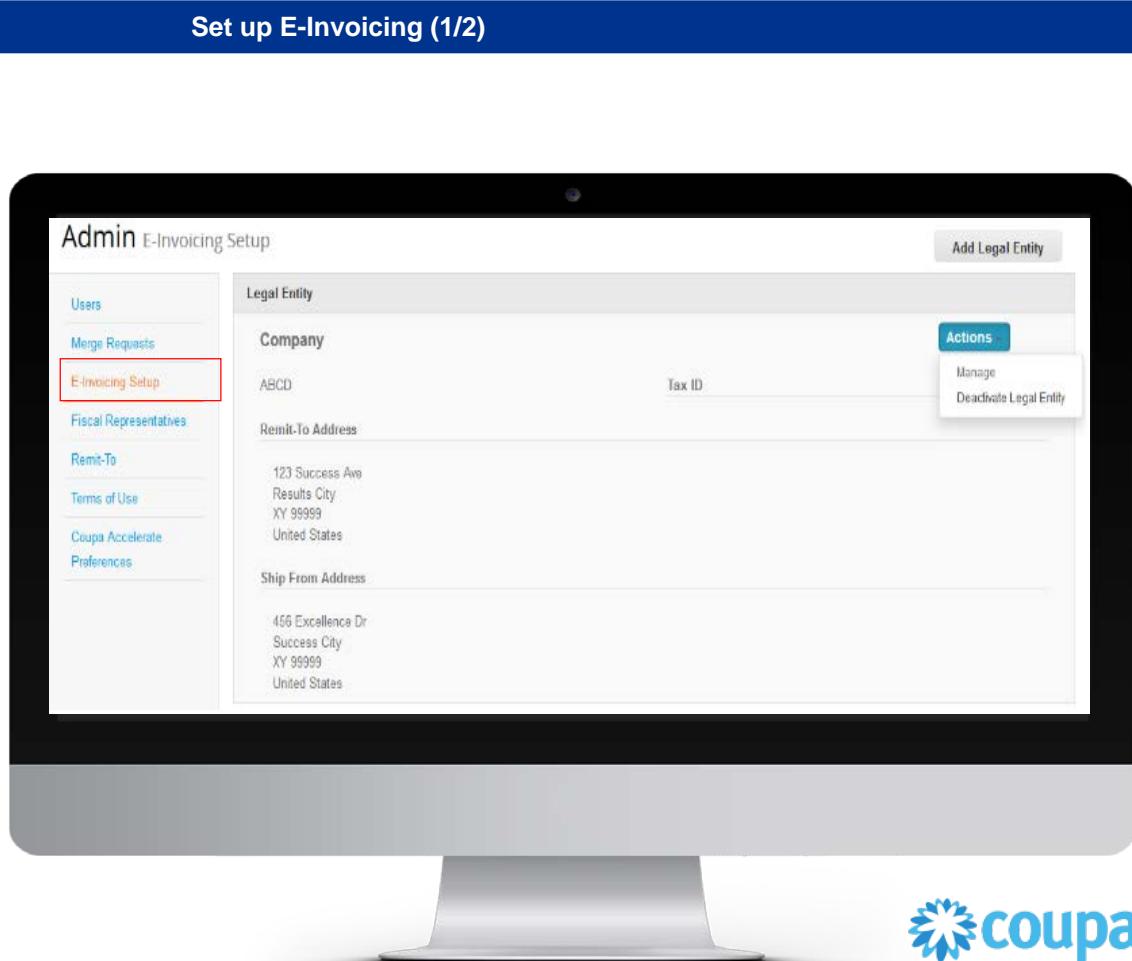
1. You can invite users and giving them access to all or some features in the CSP
2. To invite new users:
 - a. Go to the **Admin** Tab
 - b. Click on the **Users** box on the left
 - c. Click on the **Invite User** button
 - d. Fill out the fields and select the permissions and customers you would like the new user to have access to



Administer the CSP

1. To set up your account to create e-invoices, click on the **E-Invoicing Setup** link on the left of the **Admin** page.
2. Click on the **Add Legal Entity** button in the top right and enter the official name of your business registered with the government along with its location.
3. Click **Continue** and fill out the remaining fields including mandatory fields shown with red asterisk

Set up E-Invoicing (1/2)



Admin E-Invoicing Setup

Legal Entity

Company: ABCD

Remit-To Address:

123 Success Ave
Results City
XY 99999
United States

Ship From Address:

456 Excellence Dr
Success City
XY 99999
United States

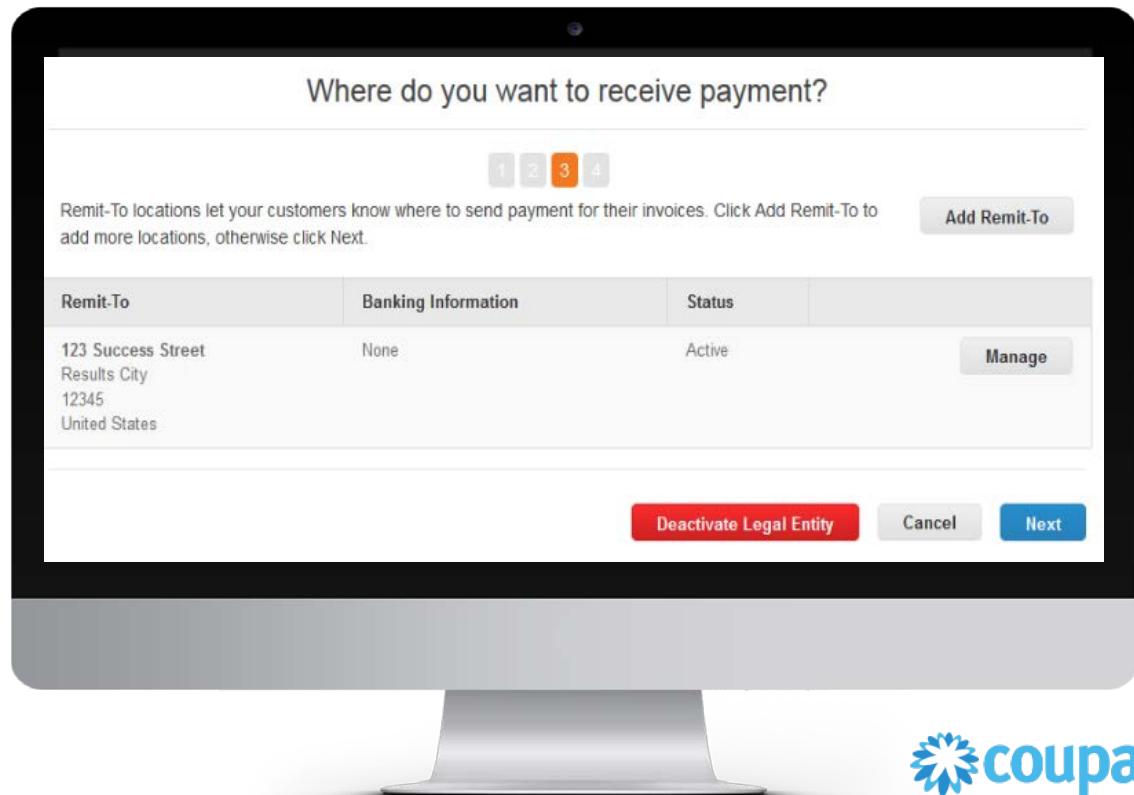
Actions

- Manage
- Deactivate Legal Entity

Administer the CSP

Set up E-Invoicing (2/2)

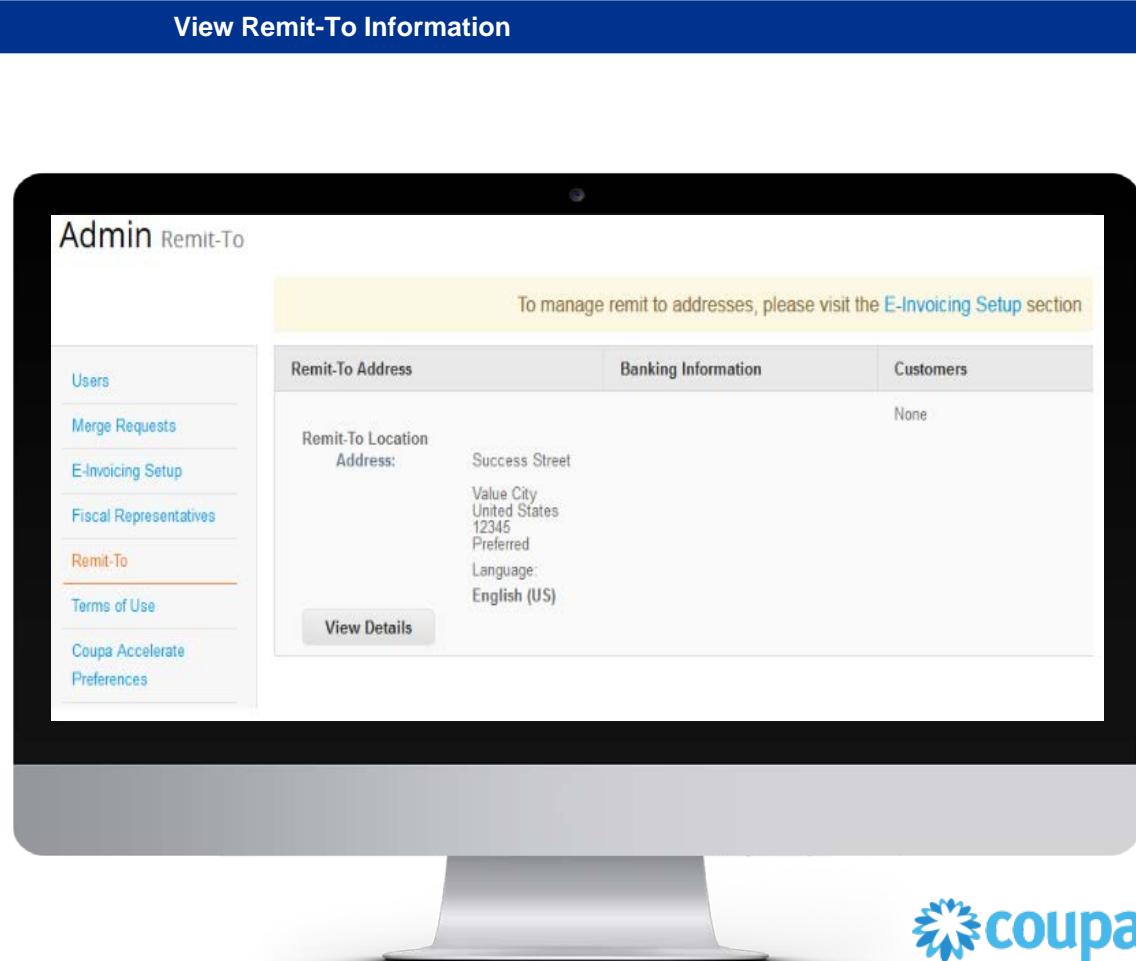
1. During creating a new entity in the portal, it will be required that the supplier put in the their remit-to information that the supplier's customer will be sending payments to
2. To add a new remit-to address click on the **Add Remit-To** button and fill in the necessary fields and click **Continue**



Administer the CSP

1. Click on the **Admin** Tab and click on the **Remit-To** link on the left to view the list of remit-to addresses and their details
2. By clicking **View Details** will allow the supplier to see more information relating to their remit-to information

View Remit-To Information



The image shows a computer monitor displaying the Coupa Admin interface. The title bar says "View Remit-To Information". The main content is titled "Admin Remit-To". On the left, there's a sidebar with links: Users, Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To (which is highlighted in orange), Terms of Use, Coupa Accelerate, and Preferences. The main area shows a table with three columns: "Remit-To Address", "Banking Information", and "Customers". Under "Remit-To Address", there's a section for "Remit-To Location" with fields for "Address" (Success Street), "Value City" (United States, 12345), "Preferred", and "Language" (English (US)). A "View Details" button is at the bottom of this section. A note at the top right says "To manage remit to addresses, please visit the [E-Invoicing Setup](#) section".



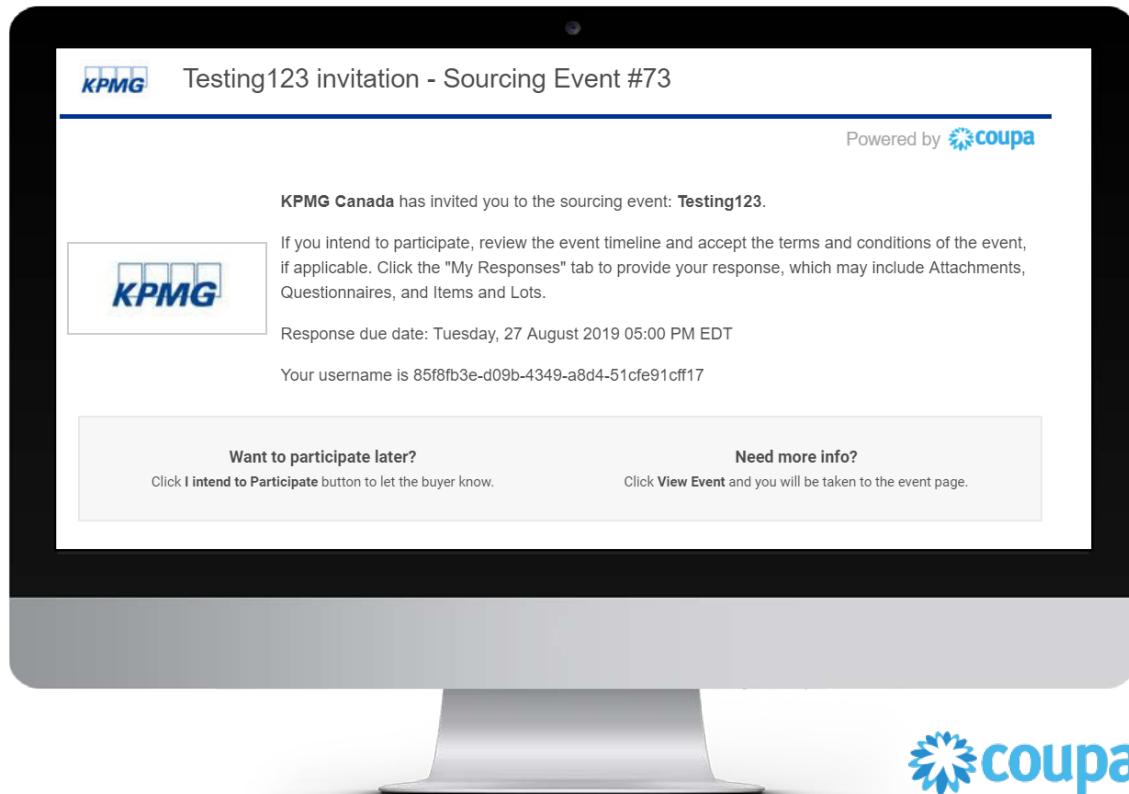
You can create additional Remit-To if you have more than one address



How Suppliers Participate in Events

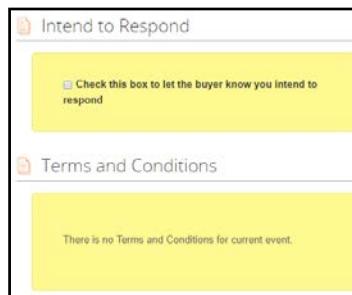
Invitation to supplier to participate in an event

- Suppliers receive an e-mail from buyer with an invitation to participate in an upcoming RFI/RFP/RFQ/Reverse Auction event.
- Suppliers can access the event (RFI/RFP/RFQ/Reverse Auction) through the **invitation link** by following the instructions mentioned after clicking on the link.
- The supplier will respond to the event by clicking on a link which is shared to supplier via email. The supplier will be prompted to set up their credentials and log in to the sourcing response portal.
- Once the suppliers click on the activation link, suppliers need to set up their password.
- Suppliers only need to set their password while logging into the system for the first time.
- Suppliers can use the same log-in credentials for further events they are invited to.



How Suppliers Participate in Events

- Supplier can click on the event number to enter the event
- On the top right-hand corner, the supplier can see event end date and time.
- Suppliers can only respond within event start date and event end date.
- Supplier needs to click the checkbox in front of Intend to Respond and Terms and Conditions if applicable to view subsequent event sections such as Attachments, Questionnaire & Items and Lots.



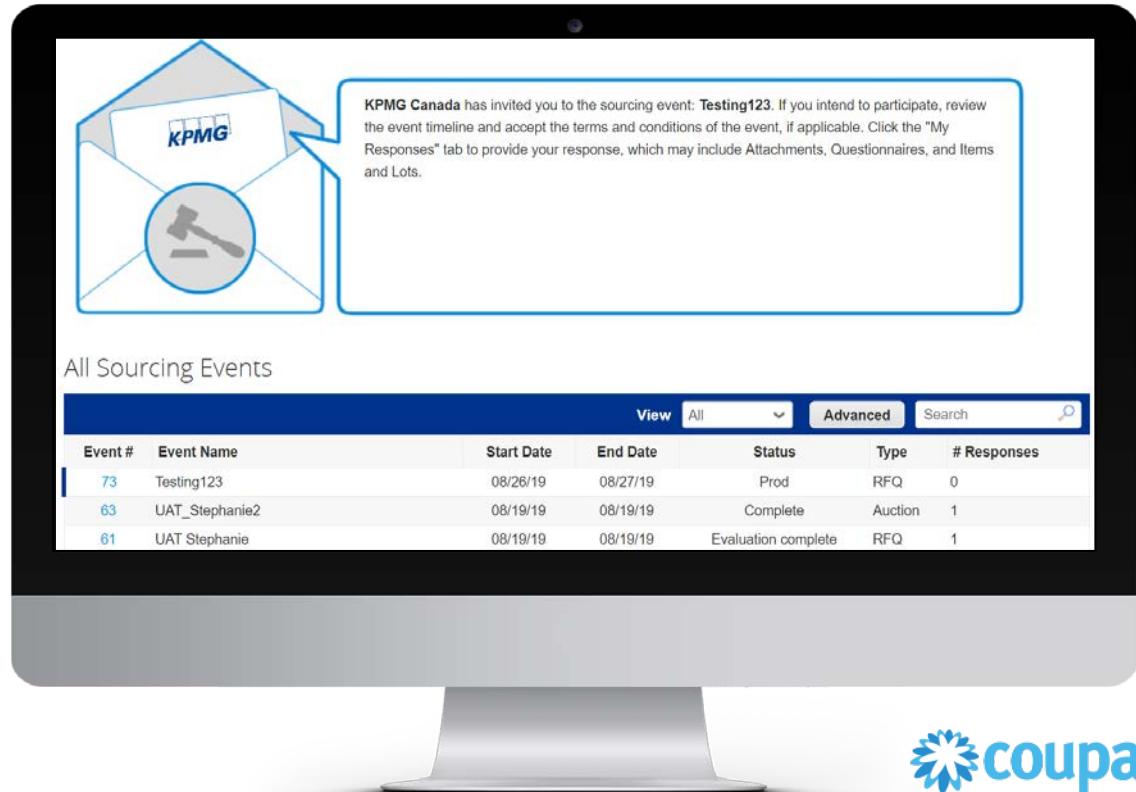
Intend to Respond

Check this box to let the buyer know you intend to respond

Terms and Conditions

There is no Terms and Conditions for current event.

Invitation to supplier to participate in an event



KPMG Canada has invited you to the sourcing event: Testing123. If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Questionnaires, and Items and Lots.

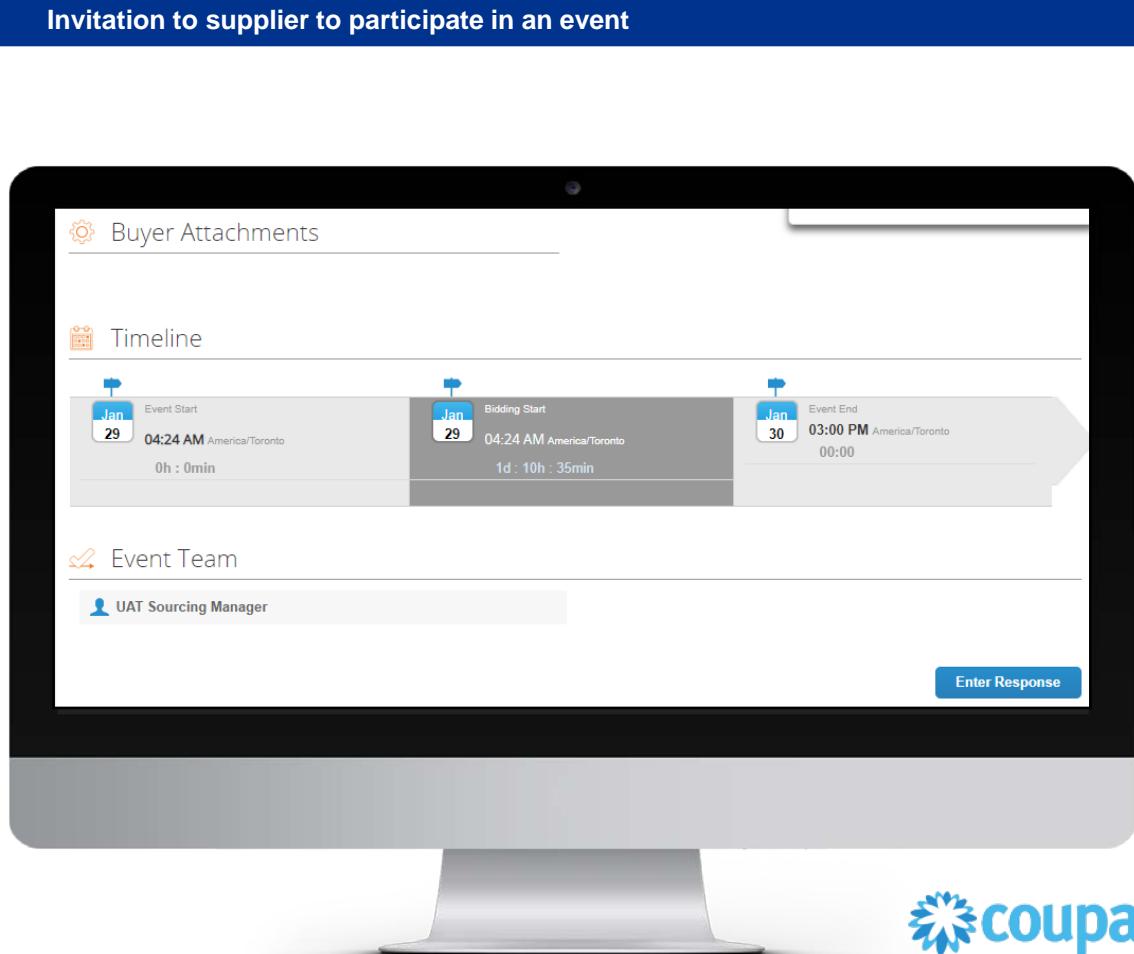
All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	# Responses
73	Testing123	08/26/19	08/27/19	Prod	RFQ	0
63	UAT_Stephanie2	08/19/19	08/19/19	Complete	Auction	1
61	UAT Stephanie	08/19/19	08/19/19	Evaluation complete	RFQ	1

coupa

How Suppliers Participate in Events

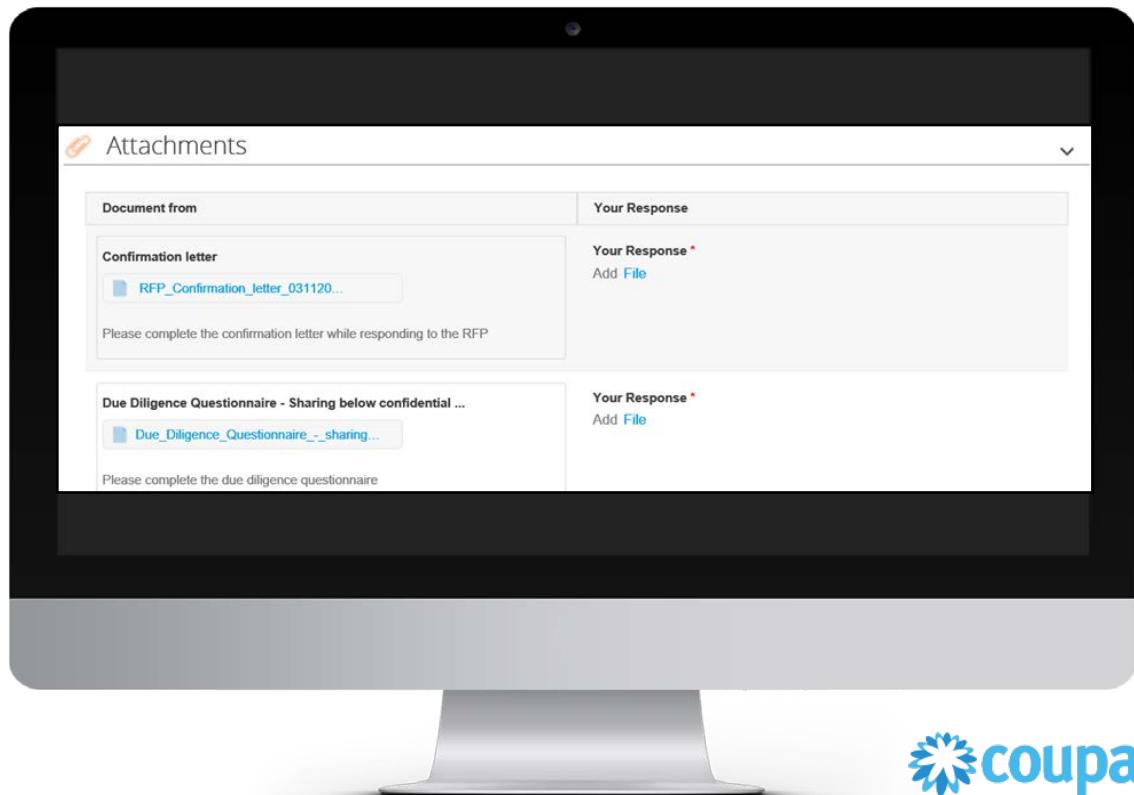
- The **Enter Response** button towards the bottom of the screen will only become active after the supplier clicks on the checkbox in front of Intend to Respond and Terms and Conditions if applicable.



How Suppliers Participate in Events

Attachments

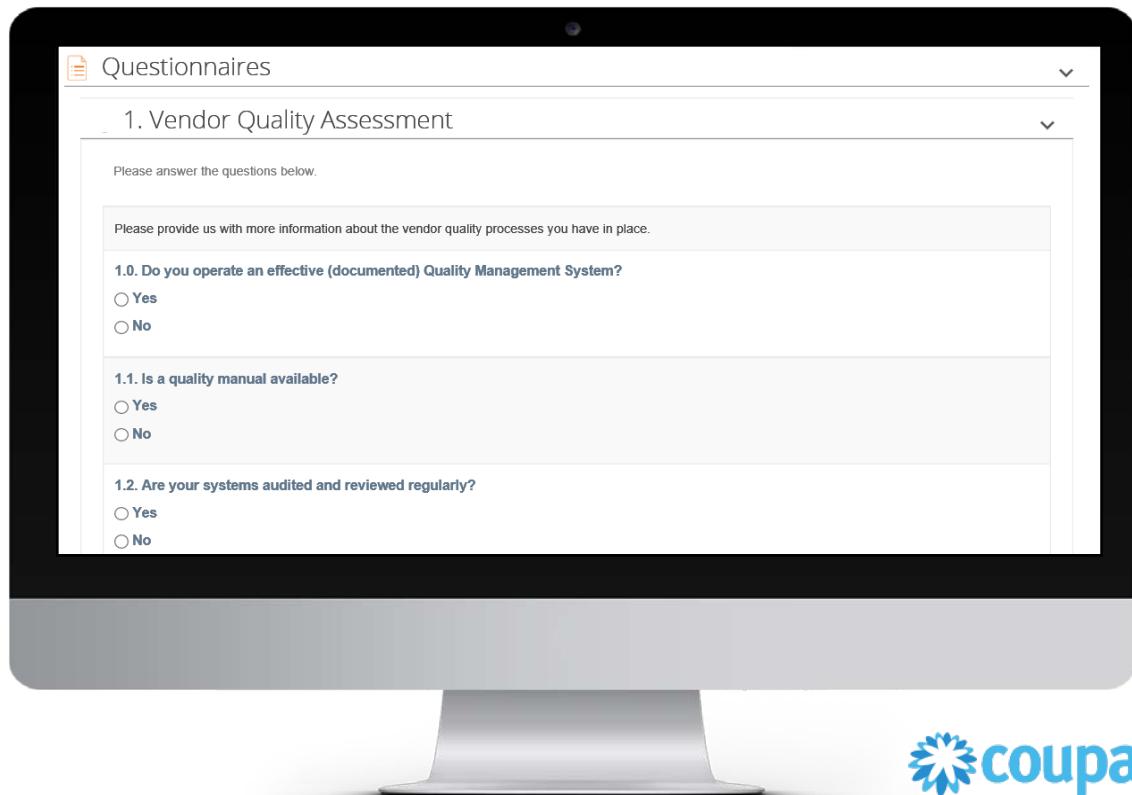
- Suppliers can add multiple attachments to their responses.
- The attachments can be made mandatory by the buyer when submitting the event.



How Suppliers Participate in Events

Questionnaire

- The event owner can add a questionnaire at both event level and item level.
- The event owner can also make responding to the questionnaire mandatory.

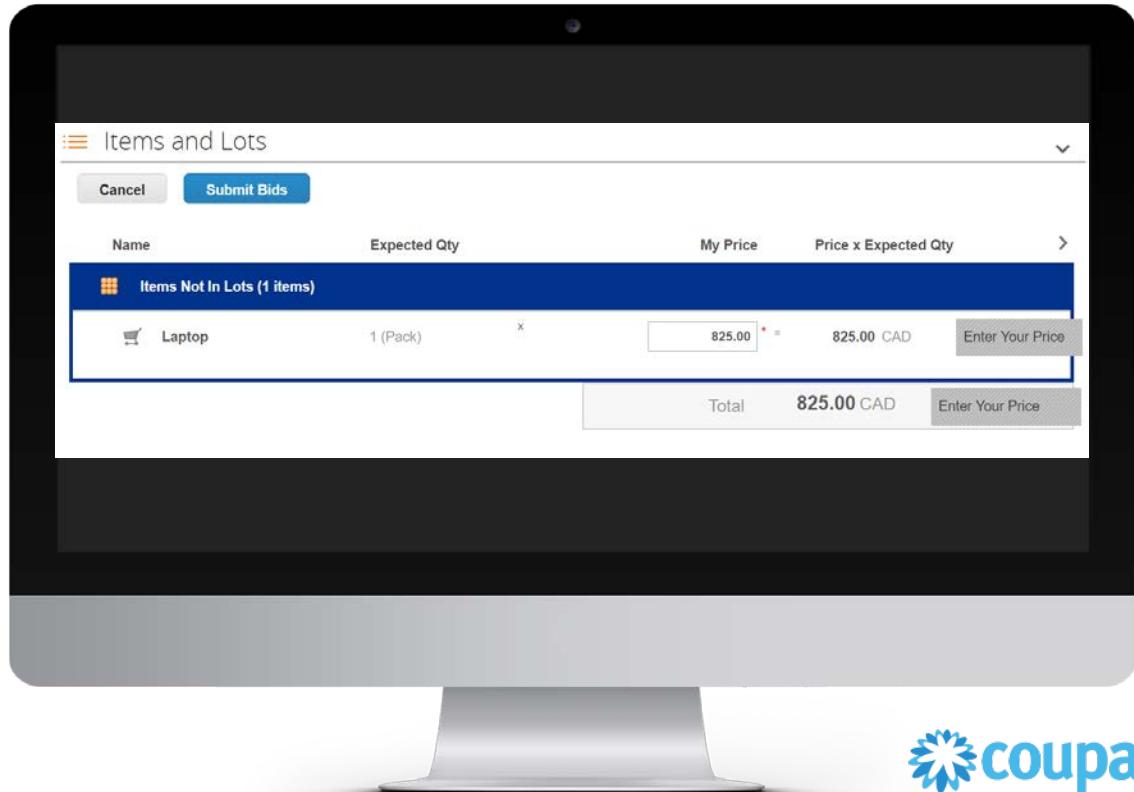


How Suppliers Participate in Events

- The supplier provides the response to the item / services
- The buyer may also request additional information at an item level, such as:
 - Attachments
 - Questionnaire
 - Item description

* Supplier entered price

Items and Lots



Name	Expected Qty	My Price	Price x Expected Qty
Laptop	1 (Pack)	825.00	825.00 CAD

Items and Lots

Cancel Submit Bids

Name Expected Qty My Price Price x Expected Qty >

Items Not In Lots (1 items)

Laptop 1 (Pack) 825.00 * = 825.00 CAD Enter Your Price

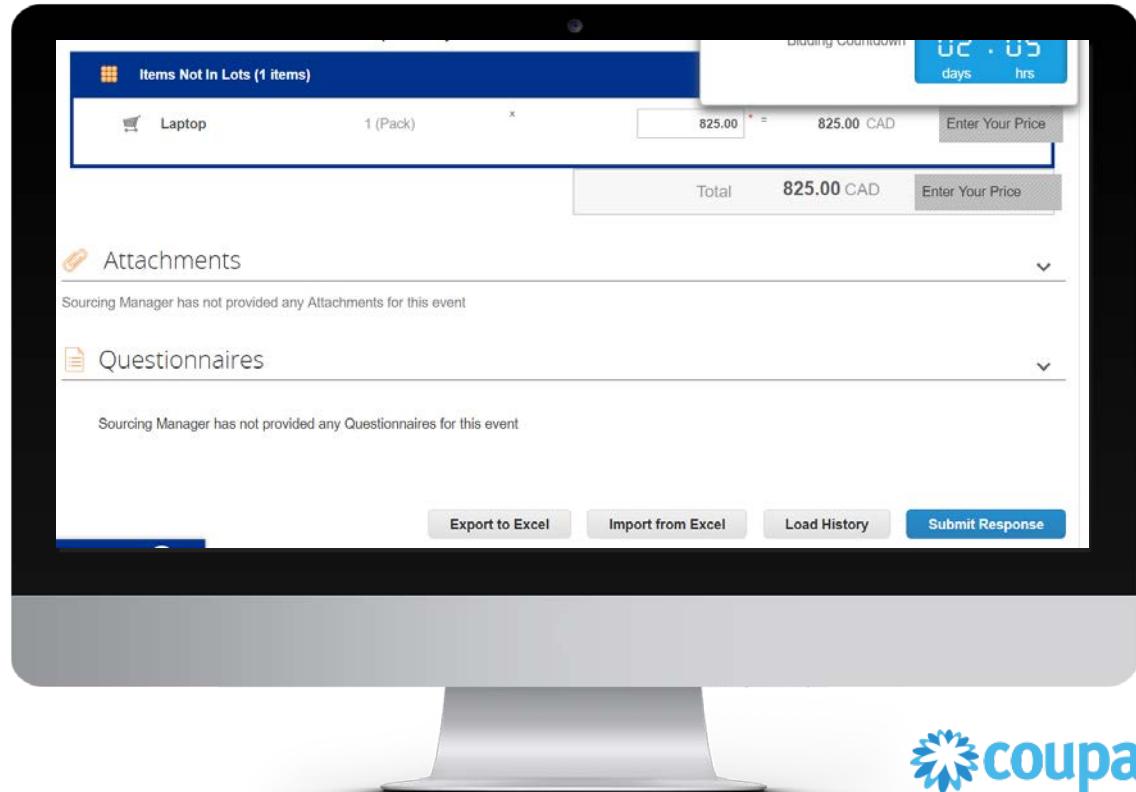
Total 825.00 CAD Enter Your Price

coupa

How Suppliers Participate in Events

- The supplier can choose to enter their response by CSV import if they wish
- The supplier can export response and allows view and export history
- Once ready, the supplier can submit response to buyer

Import and Export Response



The image shows a computer monitor displaying a Coupa software interface. The interface is titled "Import and Export Response". At the top, there is a summary: "Items Not In Lots (1 items)" for a "Laptop" in "1 (Pack)" at a price of "825.00 CAD". Below this, there is a "Total" of "825.00 CAD" and a field to "Enter Your Price". The main content area is divided into sections: "Attachments" and "Questionnaires". Both sections have a message: "Sourcing Manager has not provided any Attachments for this event" and "Sourcing Manager has not provided any Questionnaires for this event". At the bottom of the interface, there are four buttons: "Export to Excel", "Import from Excel", "Load History", and a blue "Submit Response" button. The monitor is white and sits on a silver stand.

How Suppliers Participate in Events

Message Center

Messages 1 ▼

Apple Computer... a minute ago

Hi

Send Message

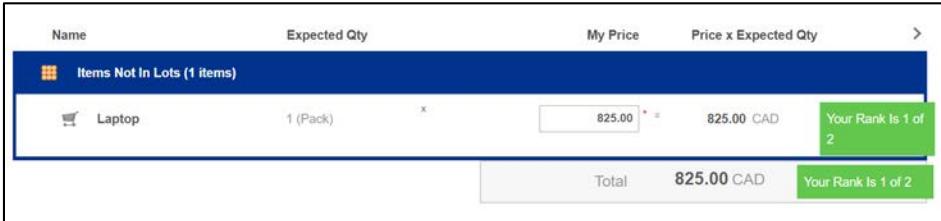
Type new message

Having Technical Issues? Contact sourcing.support@coupa.com

- Suppliers can communicate with the buyers via the message centre
- The communication through message centre will also be received in the supplier's email.

Suppliers Participating in Live Auction

Live Auction

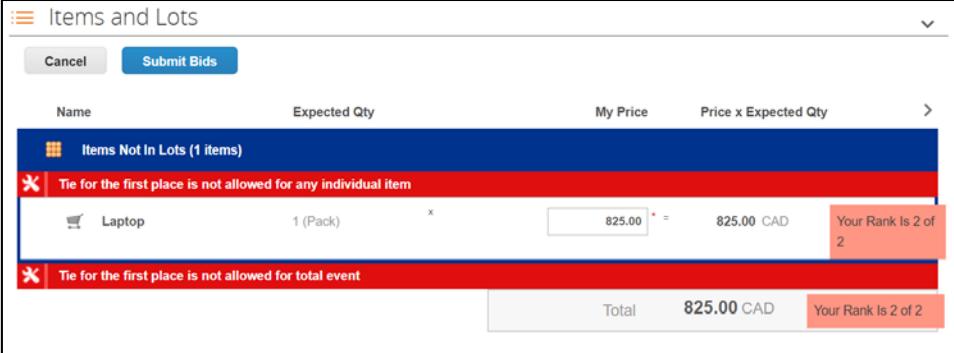


The screenshot shows a live auction interface for a supplier. At the top, there are columns for 'Name', 'Expected Qty', 'My Price', and 'Price x Expected Qty'. Below this, a section titled 'Items Not In Lots (1 items)' shows a single item: a 'Laptop' with an 'Expected Qty' of '1 (Pack)'. The 'My Price' is '825.00' CAD, and the 'Price x Expected Qty' is '825.00 CAD'. To the right, a green box displays 'Your Rank Is 1 of 2'. At the bottom, a summary shows a 'Total' of '825.00 CAD' and another green box stating 'Your Rank Is 1 of 2'.

- The steps to respond to an auction event are the same as RFI/RFP/RFQ. The pre-bidding steps are the same where suppliers need to fill in their details, prices, etc. The only difference comes at the stage of participating in a live auction.
- Based on the settings the buyer has set, the suppliers will be able to either view their rank only, or view their rank in comparison to other suppliers or just the best price.
- For example, the suppliers will see one of the below options depending on the settings the buyer has enabled:
 - “Your Rank is 4 of 7”
 - “Your Rank is 4”
 - “The best price for this item is \$430”
- Suppliers cannot see who else is competing in the bidding at any time.

Suppliers Participating in Live Auction

Live Auction



The screenshot shows a 'Live Auction' interface for suppliers. At the top, there are 'Cancel' and 'Submit Bids' buttons. The main area is titled 'Items and Lots' and shows a table with columns: Name, Expected Qty, My Price, and Price x Expected Qty. A red error message 'Tie for the first place is not allowed for any individual item' is displayed above the table. The table row for a 'Laptop' shows a bid of 825.00 CAD. A red box highlights the message 'Your Rank Is 2 of 2'.

- In case the supplier's bid is the same as another supplier, and the buyer has not allowed tie bids, the supplier will see the below window. In this case, the supplier needs to change his or her bid and improve the bid by a threshold percentage or by a specified dollar amount that the buyer has set.
- The supplier's rank will get updated if another supplier bids lower than them. It will be updated only if the buyer has activated view rank option for the suppliers. Suppliers can change their prices and submit bids throughout the auction event. Once the suppliers enter their final bid, they can click on **Submit Response**
- Note: as of R22, Dutch Reverse Auctions are now a selectable option alongside regular Reverse Auctions.

Thank you!