



# Navigating the CSP & creating reports and notifications

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

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2019

# Navigating the CSP & creating reports and notifications

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# Navigating the CSP & setting up a profile

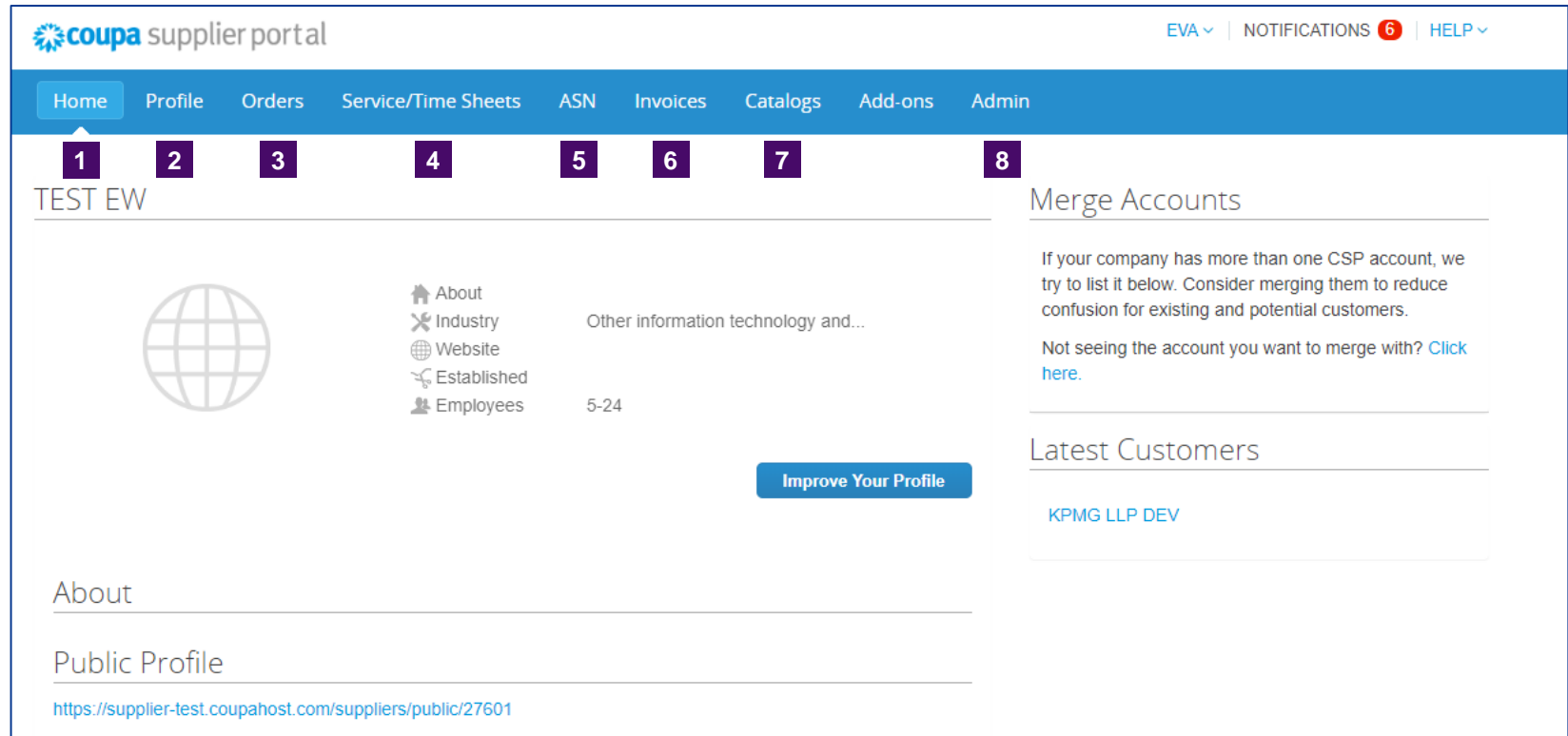
# Navigating the CSP: Homepage

1. **Account:** Your user account name.
2. **Menu:** CSP menu.
3. **Notifications:** Allows you to view notifications or to manage your notification preferences
4. **Help:** Access the CSP help menu.
5. **Your company name:** Displays your company name as it is set up for KPMG LLP.
6. **Merge Accounts:** Use this section to merge multiple CSP accounts.

The screenshot shows the Coupa Supplier Portal homepage. At the top, the header includes the Coupa logo and 'supplier portal' text. On the right side of the header, there are links for 'EVA', 'NOTIFICATIONS' with a red badge showing '6', and 'HELP'. Below the header is a navigation menu with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is divided into two columns. The left column features a large globe icon and a list of links: About, Industry, Website, Established, and Employees. Below these links is a button labeled 'Improve Your Profile'. The right column contains a section titled 'Merge Accounts' with a paragraph of text and a link 'Click here'. Below this is a section titled 'Latest Customers' with a link 'KPMG LLP DEV'. The page is annotated with numbered callouts: 1 points to the 'EVA' link, 2 points to the 'Home' menu item, 3 points to the 'NOTIFICATIONS' badge, 4 points to the 'HELP' link, 5 points to the 'TEST EW' text, and 6 points to the 'Merge Accounts' section.

# Navigating the CSP: Menu overview

1. **Home:** Brings you back to the home menu.
2. **Profile:** Allows you to update your profile.
3. **Orders:** Access the purchase order section to view and acknowledge purchase orders and flip a PO into an invoice and/or credit note.
4. **Service/Time Sheets:** Allows you to submit service time sheets. (This is **not** used for KPMG LLP).
5. **ASN:** Allows you to submit advance shipping notifications. (This is **not** used for KPMG ULLP).



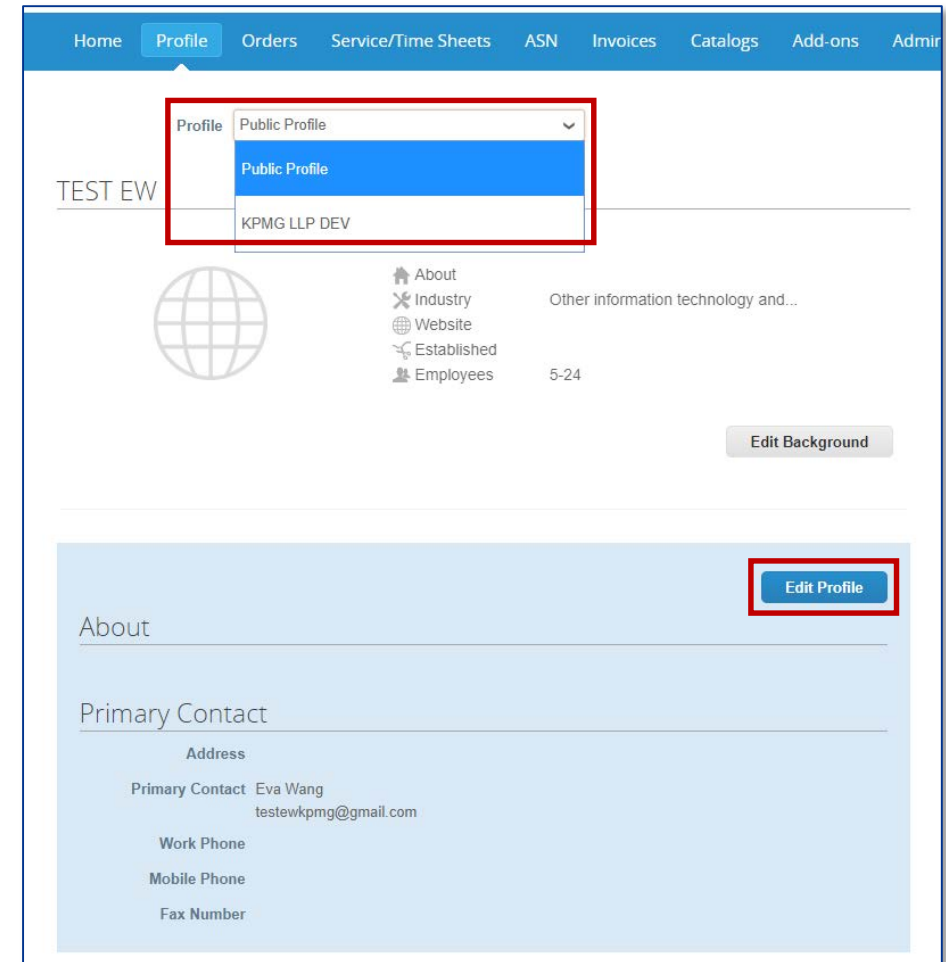
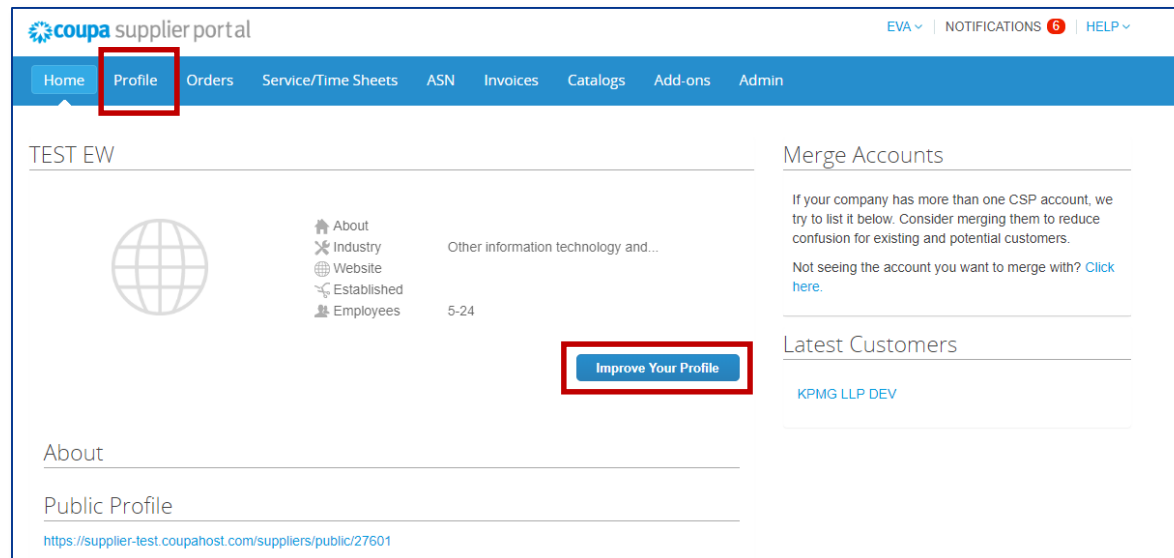
6. **Invoices:** Access the invoices section to view and submit invoices.

7. **Catalogs:** Access to the catalog section (This is **not** used for KPMG LLP).

8. **Admin:** Allows you to maintain your admin settings: invite additional users, set a remit to address, etc.

# Setting up a profile

1. Click on **Profile** or **Improve Your Profile** to edit your profile.
2. Choose whether the profile is public or **KPMG LLP** from the **Profile** drop down at the top of the page. Choosing **public** means that anyone with a Coupa Supplier Portal account can access this information.
3. Click on **Edit Profile** to edit your profile.



# Setting up a profile

4. Complete the fields and click **Save** at the top or bottom of the page.

You can update your profile at any time in this section. These changes will be immediately visible to KPMG LLP.

Cancel

Save

General Information

\* Name

TEST EW

Logo

Choose file No file chosen

Industry

Other information technology and computer ...

Year Established

Short Description

About

Employees

5-24

Web Site

LinkedIn Profile

http://www.linkedin.com/company/99595

Facebook Profile

http://www.facebook.com/yourcompany

Twitter Profile

http://www.twitter.com/yourcompany

Alibaba Profile

http://www.us101119782.fm.alibaba.com

Address

Address Line 1

Address Line 2

City

State

Postal Code

Country

Primary Contact

\* First Name

Eva

\* Last Name

Wang

\* Email

testewkpmg@gmail.com

Work Phone

+1 201-555-5555

Mobile Phone

+1 201-555-5555

Fax Number

+1 201-555-5555

Identification private section

Tax ID #

DUNS #

Remit-To private section

Remit-To locations let your customers know where to send payment for their invoices. You can create a single Remit-To for each customer or assign the same one to multiple customers. Note: Not all your customers may be enabled to use Remit-To's but it is generally required on invoices.

To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

Cancel

Save

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# Inviting additional users



# Inviting additional users

1. Once you are logged into the CSP, click **Admin** in the top menu. Then click **Invite User** in the **User** section.

**coupa** supplier portal

EVA ▾ | NOTIFICATIONS 6 | HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons **Admin**

## Admin Users

**Users** Merge Requests E-Invoicing Setup Fiscal Representatives Remit-To Terms of Use Coupa Accelerate Preferences SFTP Accounts

| Users   | Permissions  | Customer Access |
|---|--|-----------------|
| Eva Wang<br>testewkpmg@gmail.com<br><b>Edit</b> | ASNs<br>ASNs<br>Admin<br>Admin<br>Catalogs<br>Catalogs<br>Invoices<br>Invoices<br>Orders<br>Orders<br>Payments<br>Profiles<br>Profiles<br>Service/Time Sheets<br>Service/Time Sheets | KPMG LLP DEV    |

**Invite User**

# Inviting additional users

2. Complete the required information and click **Send Invitation**. You can control the permissions and customers that the invited user has by checking/unchecking the options under **Permissions** and **Customers**.

Once the invited user registers, they will be able to log into the CSP using their own log in credentials.

The screenshot shows a web form titled "Invite User" with a close button (X) in the top right corner. The form contains three input fields: "First Name", "Last Name", and "\* Email". Below these fields are two sections: "Permissions" and "Customers", both highlighted with red boxes. The "Permissions" section has a list of checkboxes: All, Admin, Orders, Invoices, Catalogs, Profiles, ASNs, Service/Time Sheets, and Payments. The "Customers" section has a list of checkboxes: All and KPMG LLP DEV. At the bottom right, there are two buttons: "Cancel" and "Send Invitation", with the "Send Invitation" button highlighted by a red box.



# Creating reports & downloading invoices

# Creating reports

You can create a custom report anywhere where you see a **View** drop down field. This example shows how to create a report in Invoices.

Click on the **Invoices** tab and in the **View** drop down field click **Create View**.

**coupa supplier portal**

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Add-ons

**Invoices**

Instructions From Customer  
Test invoice instructions for supplier

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice

Export to View All Search

| Invoice # | Created Date | Status           | PO #    | Total        | Unanswered Comments | Actions |
|-----------|--------------|------------------|---------|--------------|---------------------|---------|
| 003 EW    | 04/30/19     | Approved         | K000117 | 1,200.00 GBP | No                  |         |
| 0022      | 04/24/19     | Pending Approval | K000101 | -960.00 GBP  | No                  |         |
| 002       | 04/24/19     | Approved         | K000101 | 1,200.00 GBP | No                  |         |
| 0011      | 04/24/19     | Approved         | K000102 | -24.00 GBP   | No                  |         |
| 001       | 04/24/19     | Approved         | K000102 | 600.00 GBP   | No                  |         |

# Creating reports

1. **Name:** Provide a name for your report (must be less than 30 characters).
2. **Select Customer:** Allows you to select the invoices for a sepecific customer. Select **KPMG LLP**.
3. **Visibility:** Choose who can see your report. Ensure that you always select **Only Me**. If you select **Everyone** all other users within your organizaiton will be able to see your report.
4. **Start with View:** Allows you to set a starting condition fo your report (i.e. start with all ordered requisitions).

The screenshot shows the 'Create New data table view' interface. A red box highlights the top right corner containing the 'Select Customer' dropdown menu, which is currently set to 'KPMG LLP DEV'. Another red box highlights the 'General' tab on the left. A third red box highlights the 'Conditions' tab. Below the 'Conditions' tab, there is a dropdown menu set to 'Match all conditions'. Below that, there is a field for 'Invoice #' followed by an 'is' dropdown and an empty text box. A green plus icon is visible to the right of the text box. A fourth red box highlights the 'Add group of conditions' button in the bottom right corner.

5. **Conditions:** Select **Match All Conditions** or **Match at least one condition** to identify if you want your report to match all conditions or any conditions.

6. **Add groups of conditions:** Allows you to add groups of conditions and then select **Match all conditions from at least one group** or **Match at least one condition from every group**

# Creating reports

7. **Columns:** Drag and drop fields from the **Available Columns** section to the **Selected Columns** section.

You can drag and drop the fields to re-order the order you want the columns to appear in your report. All fields under **Selected Columns** will be viewable in your report.

8. **Sort By:** Allows you to sort your data by specific criteria.
9. Click **Save** to save the report.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order

Available Columns

Selected Columns

Commented

Comments

Date Of Supply

Delivery Number

Dispute Reason

Disputed Date

Document Type

Invoice Date

Linked Document

Original Invoice Date

Original Invoice Number

Paid

Payment Information

Payment Term

Invoice #

Created Date

Status

PO #

Total

Unanswered Comments

Actions

Default Sort Order

Sort by  in 

ascending

 order.

Cancel

Save

# Creating reports

10. Once you have saved the report you can click **Export to** to export the report to a **CSV** or **Excel** file type.

Select Customer

KPMG LLP DEV

## Invoices

Instructions From Customer

Test invoice instructions for supplier

### Create Invoices i

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to

View

Approved

Search

|                      |          | Status   | PO #                    | Total        | Unanswered Comments | Actions |
|----------------------|----------|----------|-------------------------|--------------|---------------------|---------|
|                      |          | Approved | <a href="#">K000117</a> | 1,200.00 GBP | No                  |         |
|                      |          | Approved | <a href="#">K000101</a> | 1,200.00 GBP | No                  |         |
| <a href="#">0011</a> | 04/24/19 | Approved | <a href="#">K000102</a> | -24.00 GBP   | No                  |         |
| <a href="#">001</a>  | 04/24/19 | Approved | <a href="#">K000102</a> | 600.00 GBP   | No                  |         |

Per page 15 | 45 | 90

# Downloading invoices

11. Coupa stores all the invoices that you have created. If you need to acquire all the invoices, click **Export to** to download **Legal Invoice (zip)**.

**Please NOTE:** As Coupa generates legal (VAT) invoices on your behalf, it is important that you retain these documents in your document retention (archiving) system. This may be your accounting system. To facilitate the easy download of these, you can use this space to export those pdf original invoices to a zip file where you can then upload them into your archiving system of choice.

if you would like to keep your legal invoices in the CSP, you must consider whether it complies with any local storage rules and regulations in your jurisdiction before doing so.

Select Customer

KPMG LLP DEV

## Invoices

Instructions From Customer

Test invoice instructions for supplier

### Create Invoices i

Create Invoice from POCreate Invoice from ContractCreate Blank InvoiceCreate Credit Note

Export to

View

Approved

Search

|      | Date     | Status   | PO #    | Total        | Unanswered Comments | Actions |
|------|----------|----------|---------|--------------|---------------------|---------|
|      |          | Approved | K000117 | 1,200.00 GBP | No                  |         |
|      |          | Approved | K000101 | 1,200.00 GBP | No                  |         |
| 0011 | 04/24/19 | Approved | K000102 | -24.00 GBP   | No                  |         |
| 001  | 04/24/19 | Approved | K000102 | 600.00 GBP   | No                  |         |

Per page 15 | 45 | 90





# Managing notifications

# Managing notifications

1. You can manage your notifications by clicking **NOTIFICATIONS** (top right of the page) and then click **Notification Preferences**.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information 'EVA'. A red box highlights the 'NOTIFICATIONS' link with a red badge showing the number '6'. To the right of this link is a 'HELP' dropdown. Below the header is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is titled 'My Notifications'. On the left, there is a 'View' dropdown menu currently set to 'All'. Below this is a table of notifications. The table has two columns: 'Message' and 'Received'. A red box highlights a button labeled 'Notification Preferences' in the top right corner of the notification area. The table contains one notification: a checkbox, the message 'New PO K000125 for £490.00 issued by KPMG LLP DEV.', and the timestamp '05/01/19 08:50 AM'.

|                          | Message  | Received          |
|--------------------------|--|-------------------|
| <input type="checkbox"/> | New PO K000125 for £490.00 issued by KPMG LLP DEV. | 05/01/19 08:50 AM |

# Managing notifications

2a. You can enable / disable **Online**, **Email** and **SMS** notifications for **Catalogs**, **Coupa Accelerate**, **Form Responses**, **Invoices** etc.

**My Account** Notification Preferences

Settings  
Notification Preferences  
Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

**Catalogs**

|                              |  |   |                              |
|------------------------------|--|---|------------------------------|
| A new comment is received    | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A catalog is approved        | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            | <input type="checkbox"/> SMS |
| A catalog is rejected        | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            | <input type="checkbox"/> SMS |
| A catalog is about to expire | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            | <input type="checkbox"/> SMS |

**Coupa Accelerate**

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

**Coupa Pay**

|                   |  |   |                              |
|-------------------|--|---|------------------------------|
| New digital check | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
|-------------------|--|---|------------------------------|

**Form Responses**

|                                      |  |   |                              |
|--------------------------------------|--|---|------------------------------|
| A form response is approved          | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A form response is rejected          | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Supplier information is updated      | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A new comment is received            | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            | <input type="checkbox"/> SMS |
| A form response needs your attention | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

**Invoices**

|                                      |  |   |                              |
|--------------------------------------|--|---|------------------------------|
| A new comment is received            | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is approved               | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is paid                   | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is disputed               | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is withdrawn from dispute | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Legal Invoice Export Ready           | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is abandoned              | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

# Managing notifications

2b. You can enable / disable **Online**, **Email** and **SMS** notifications for **Orders**, **Profile**, **Terms of Use**, **Users**, **Service/Time Sheets** as per your personal preference.

3. Once finished, click **Save** to save your notification settings.

|   |  |   |  |
|---|--|---|--|
| Orders                                    |  |   |  |
| A new comment is received                 | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| A new order is received                   | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| Profile                                   |  |   |  |
| Public profile is updated                 | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            | <input type="checkbox"/> SMS   |
| An information update request is received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| Terms of Use                              |  |   |  |
| New Terms of Use are received             | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| Users                                     |  |   |  |
| A new customer connection is created      | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| Service/Time Sheets                       |  |   |  |
| A Service/Time Sheet is approved          | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
| A Service/Time Sheet is rejected          | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS   |
|   |  |   | <input type="button" value="Cancel"/> <input checked="" type="button" value="Save"/> |



Thank you



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