Navigating the CSP & creating reports and notifications

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

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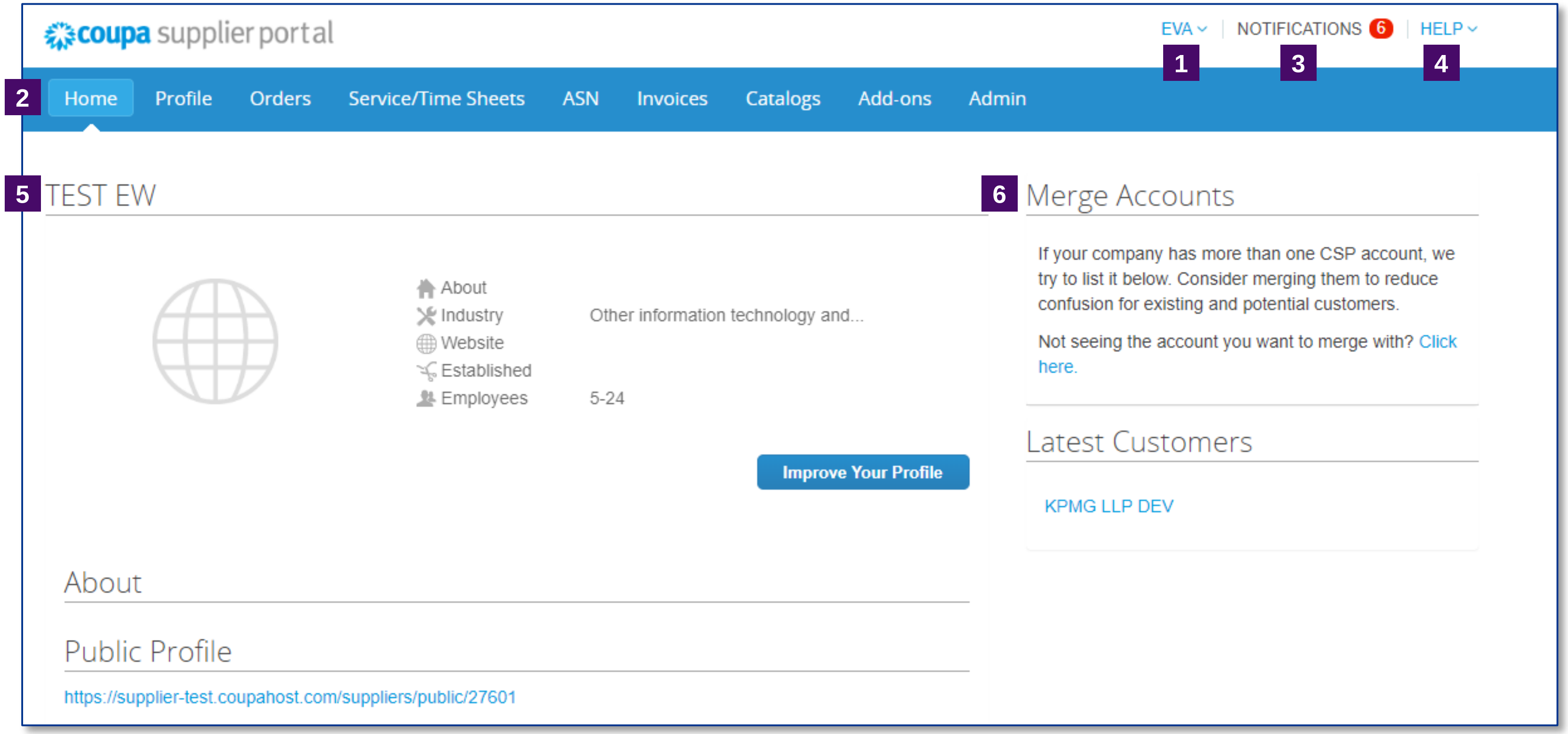
2019

Navigating the CSP & creating reports and notifications

Navigating the CSP & setting up a profile

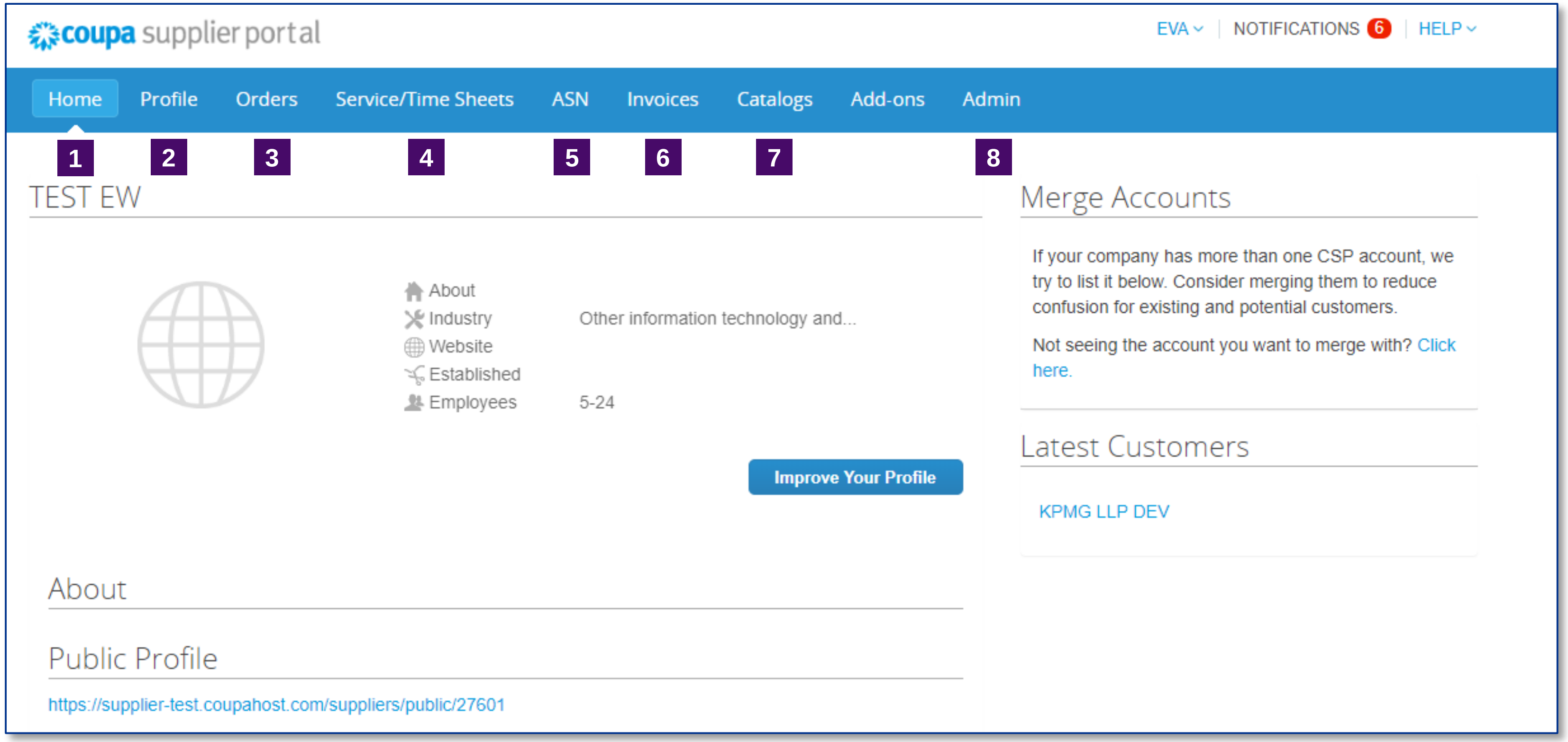
Navigating the CSP: Homepage

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.



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).

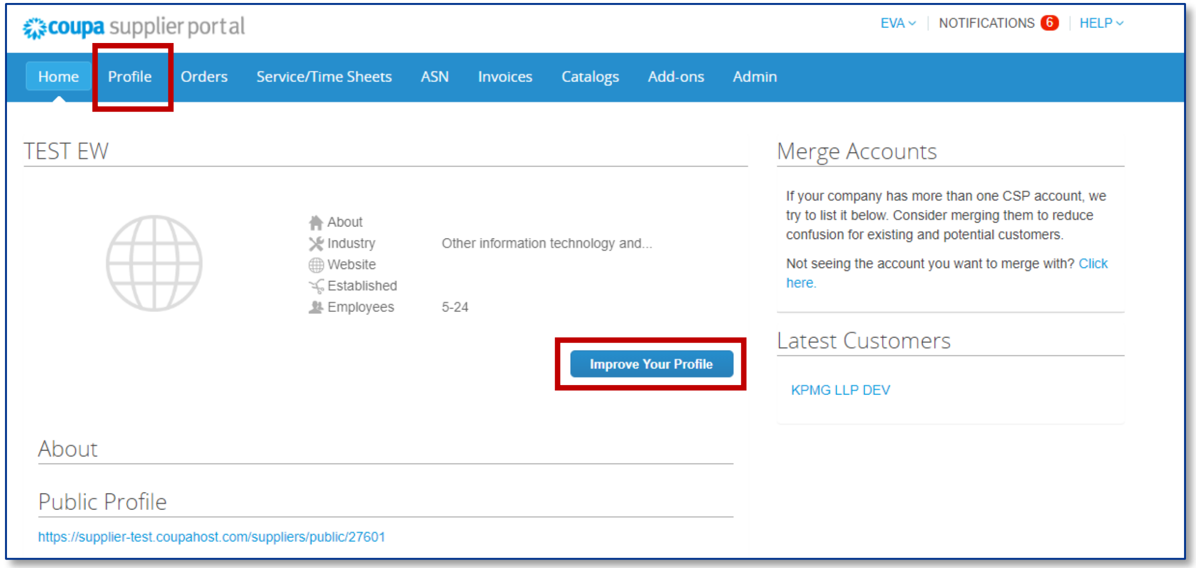
8. Admin: Allows you to maintain your admin settings: invite additional users, set a remit to address, etc.

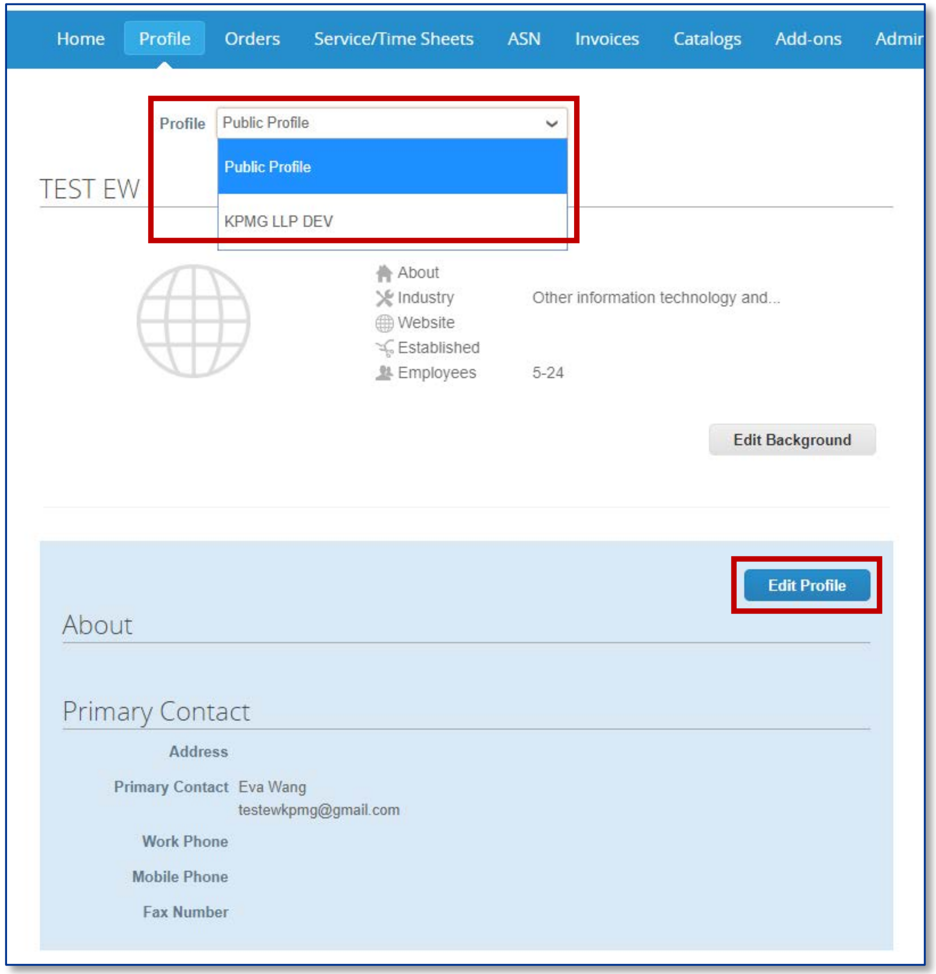
Setting up a profile

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.

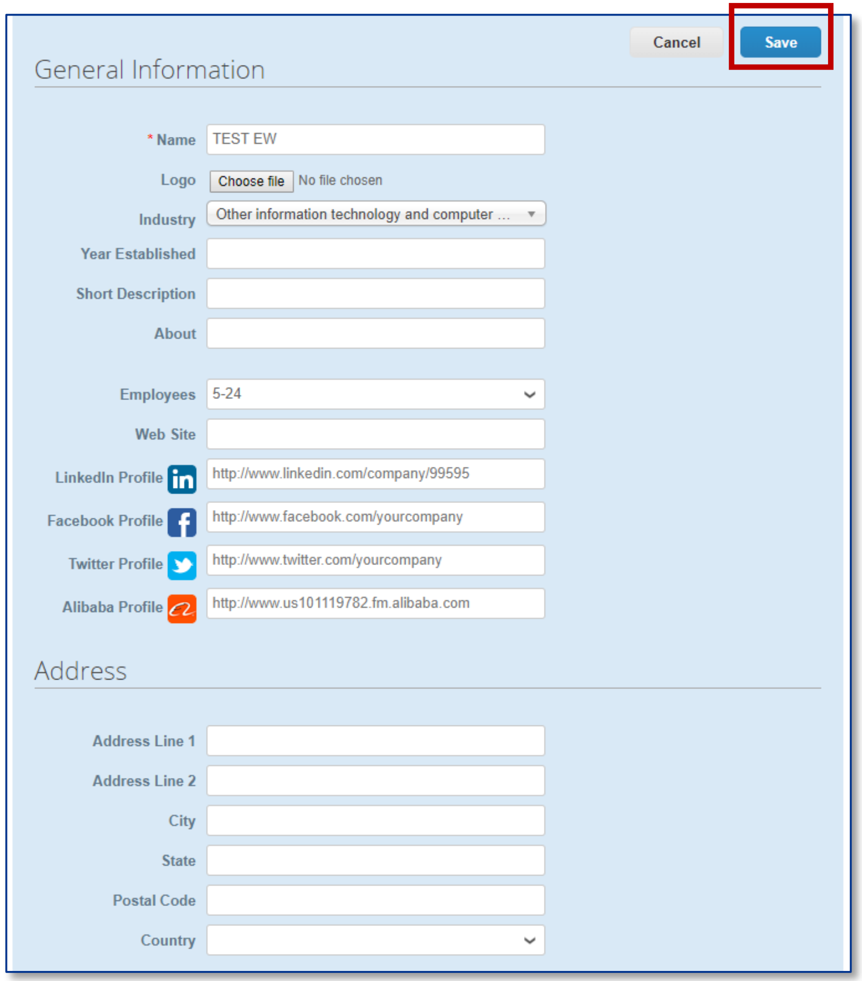


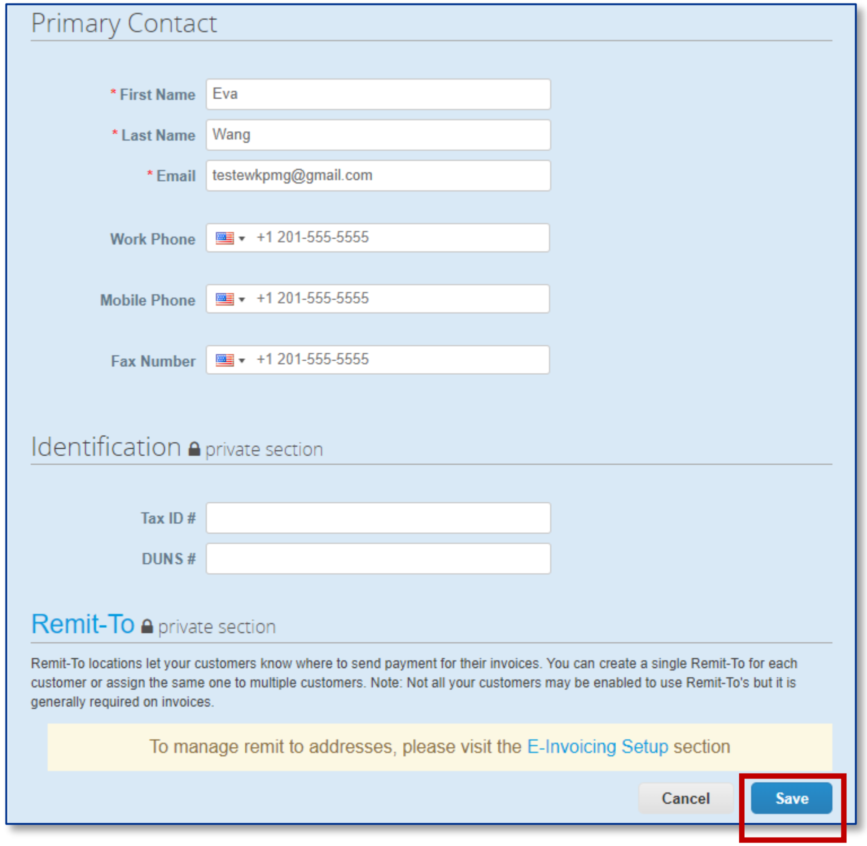


Setting up a profile

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.

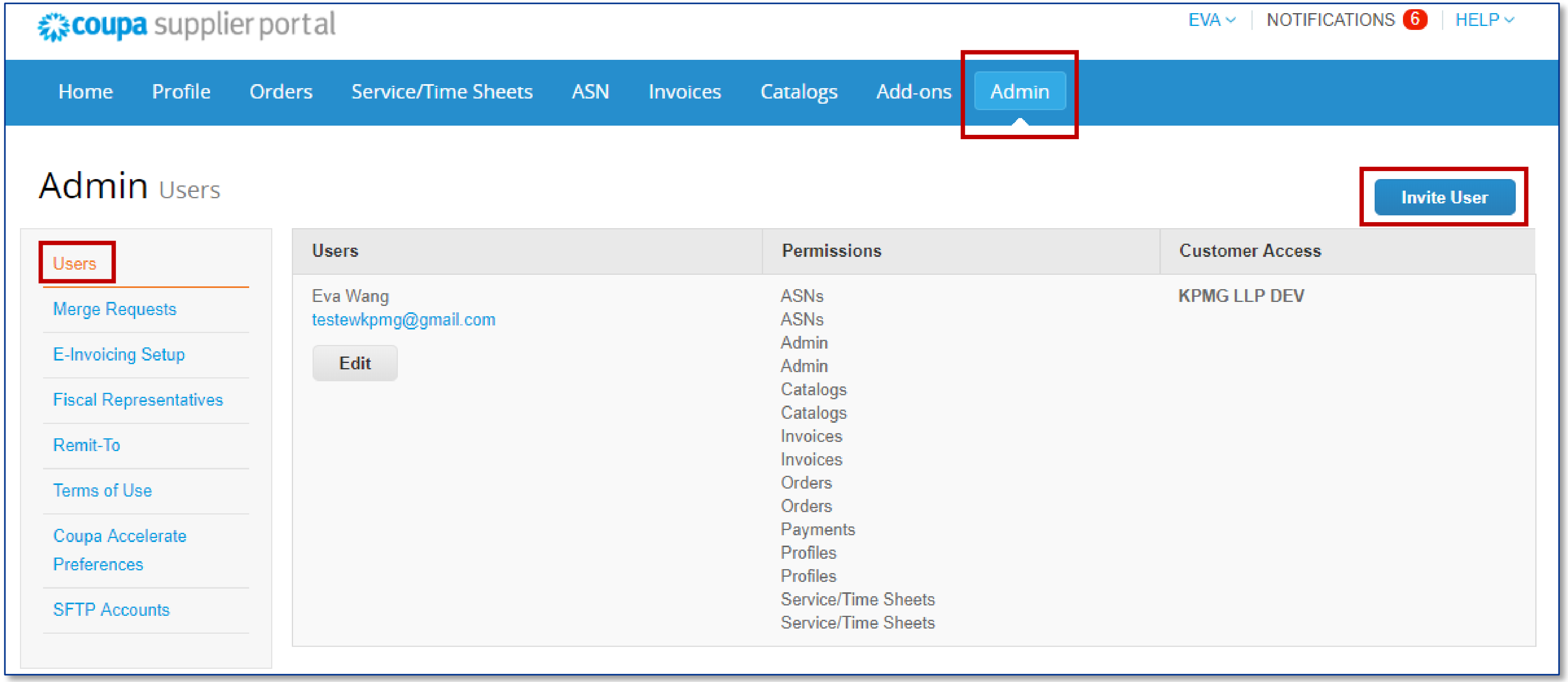




Inviting additional users

Inviting additional users

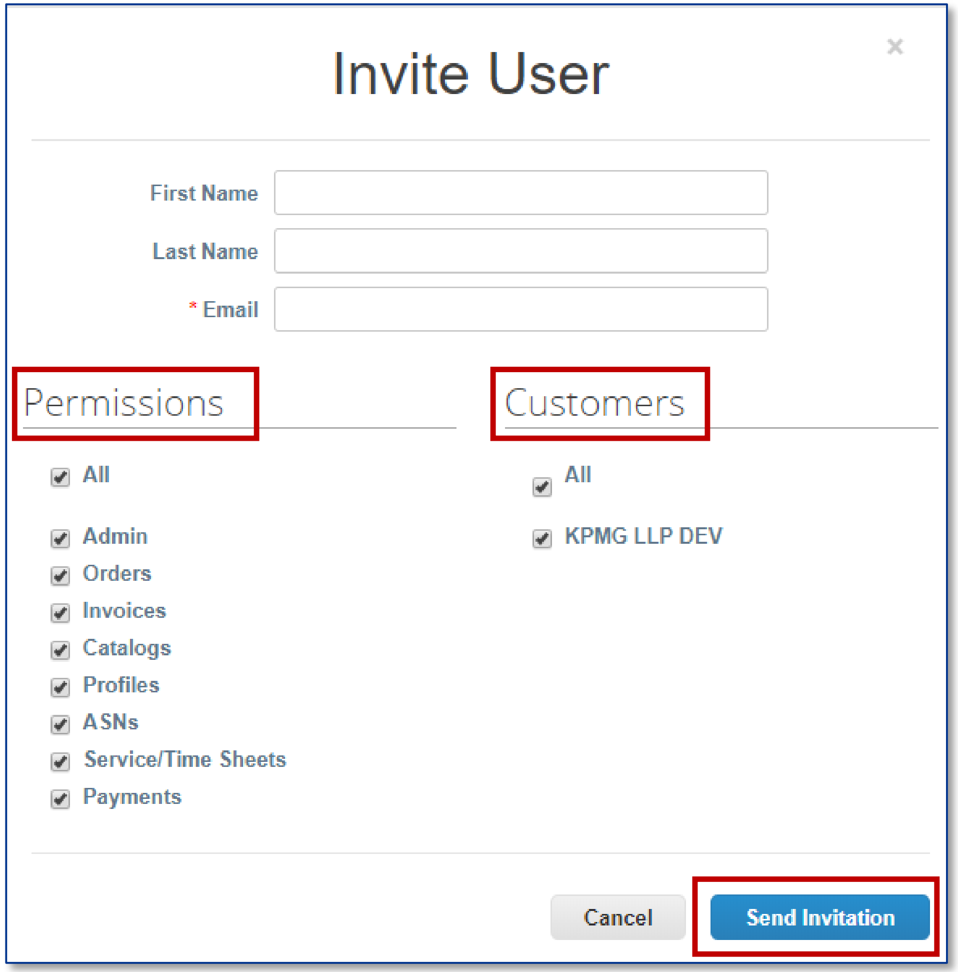
1. Once you are logged into the CSP, click **Admin** in the top menu. Then click **Invite User** in the **User** section.



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.

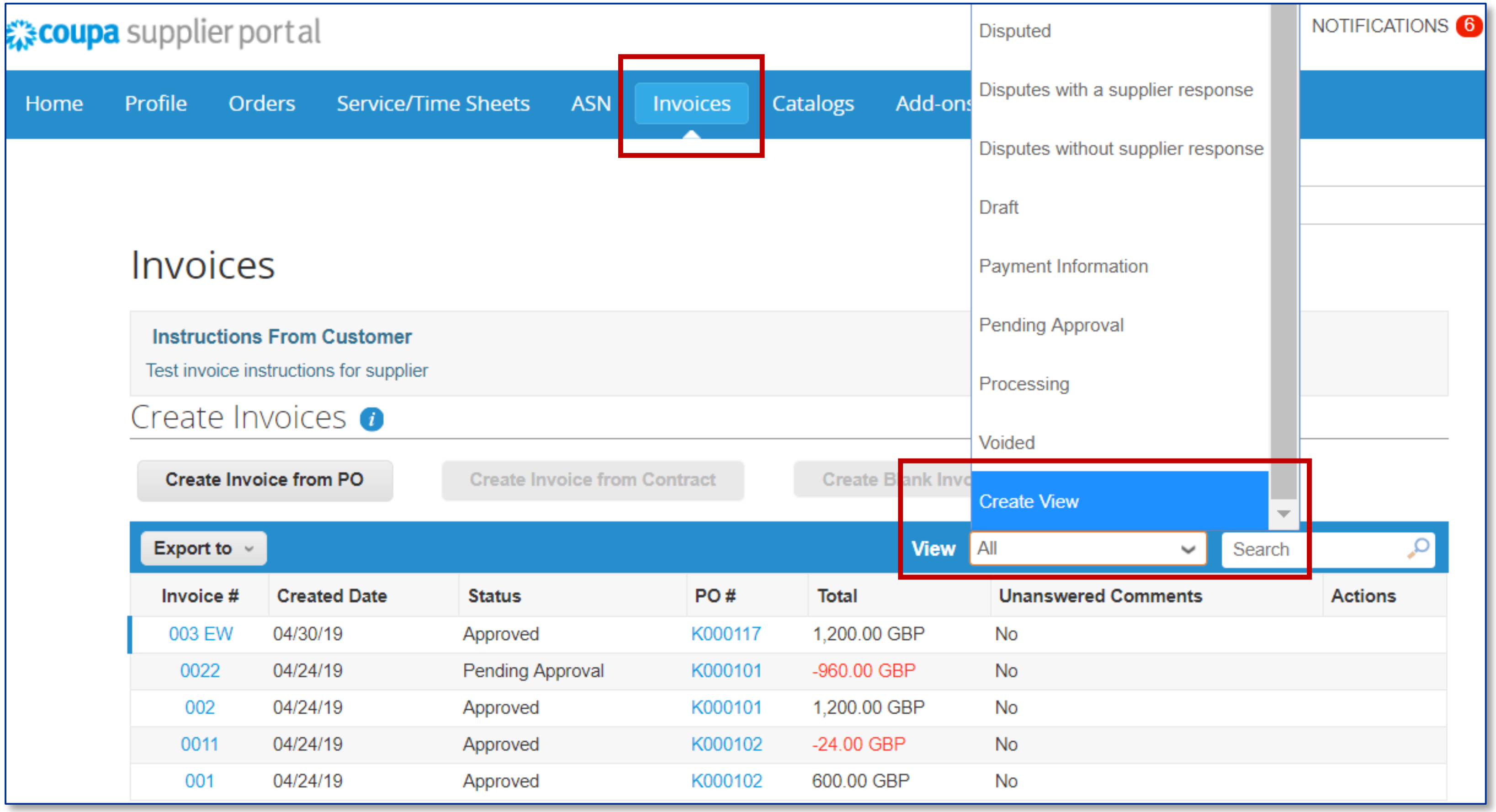


Creating reports & downloading invoices

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.**



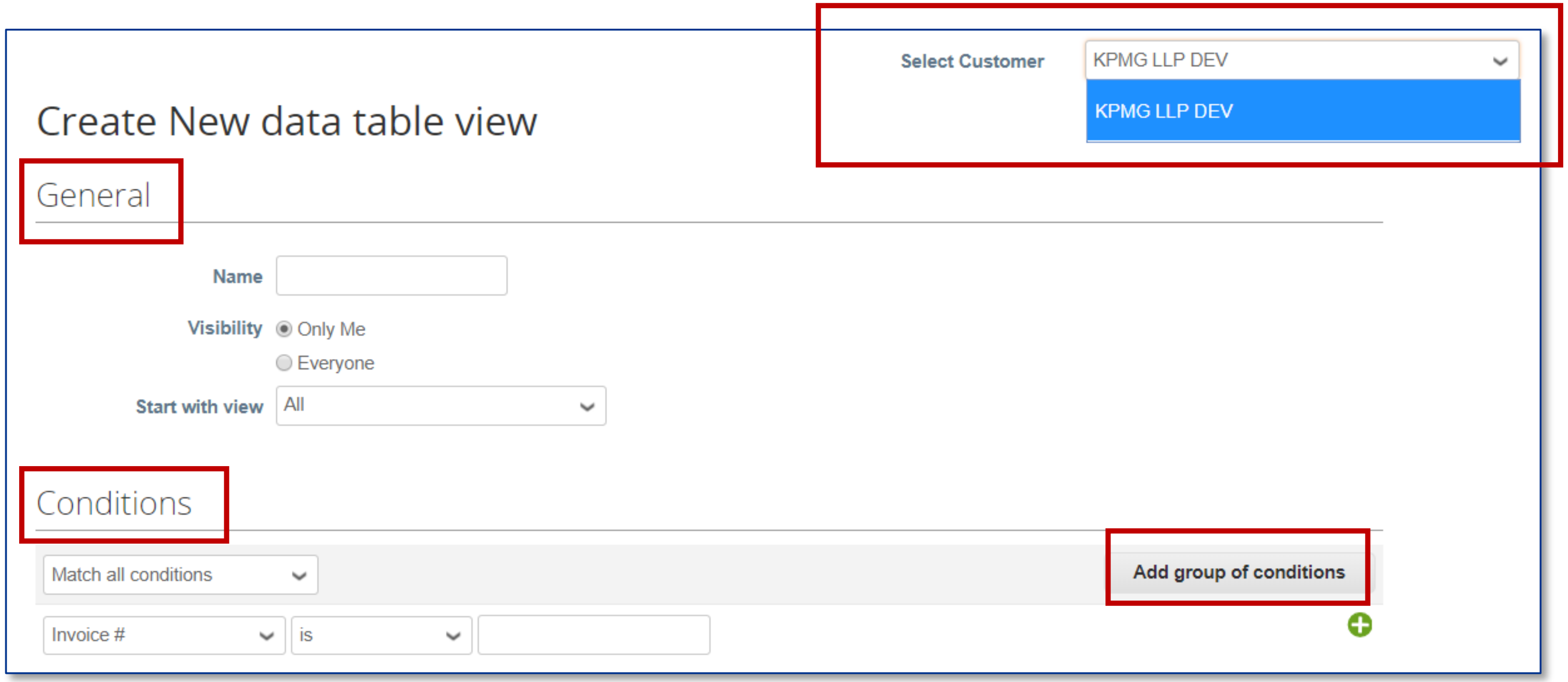
Creating reports

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 orderred requisitions).



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**

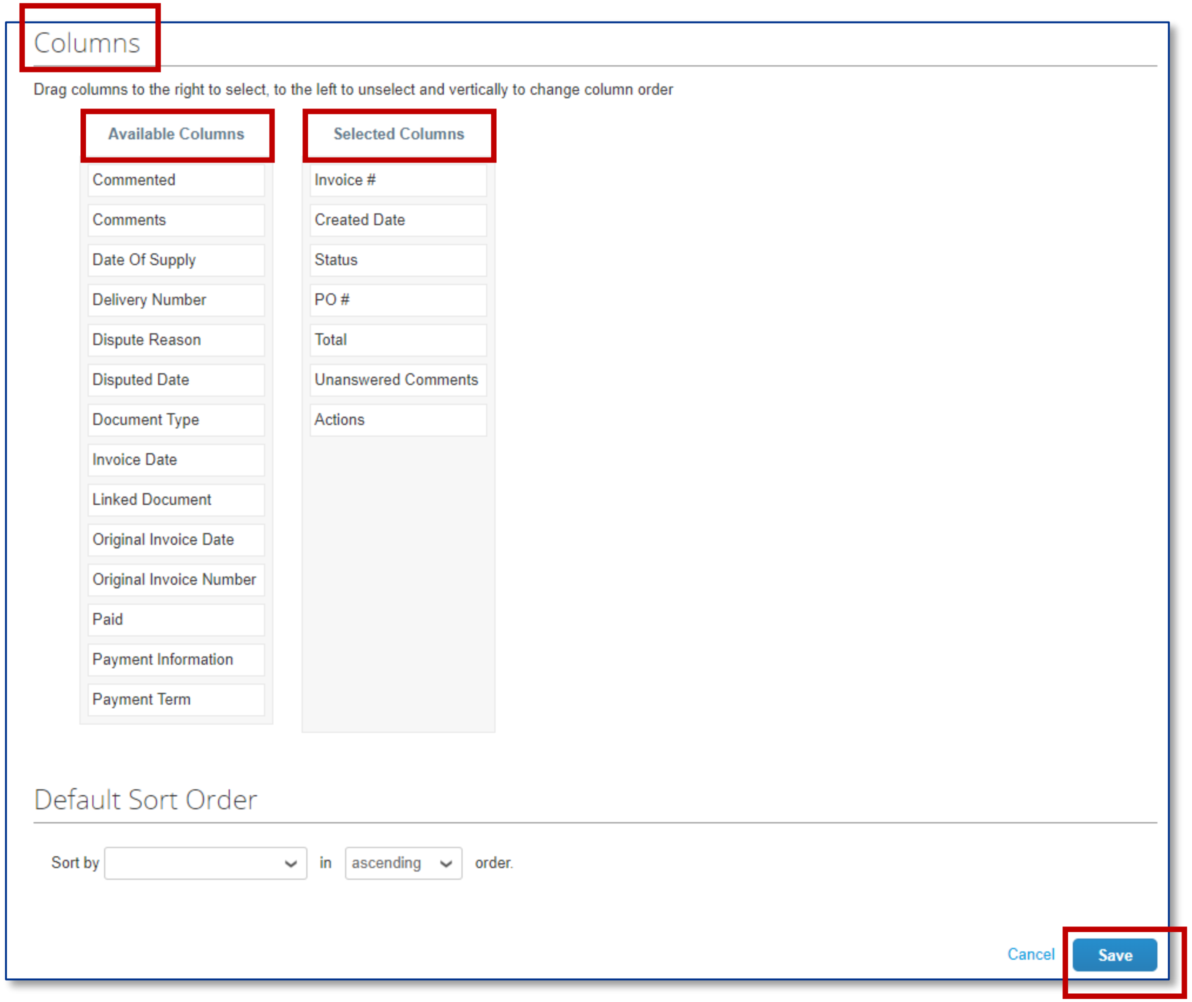
Creating reports

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.

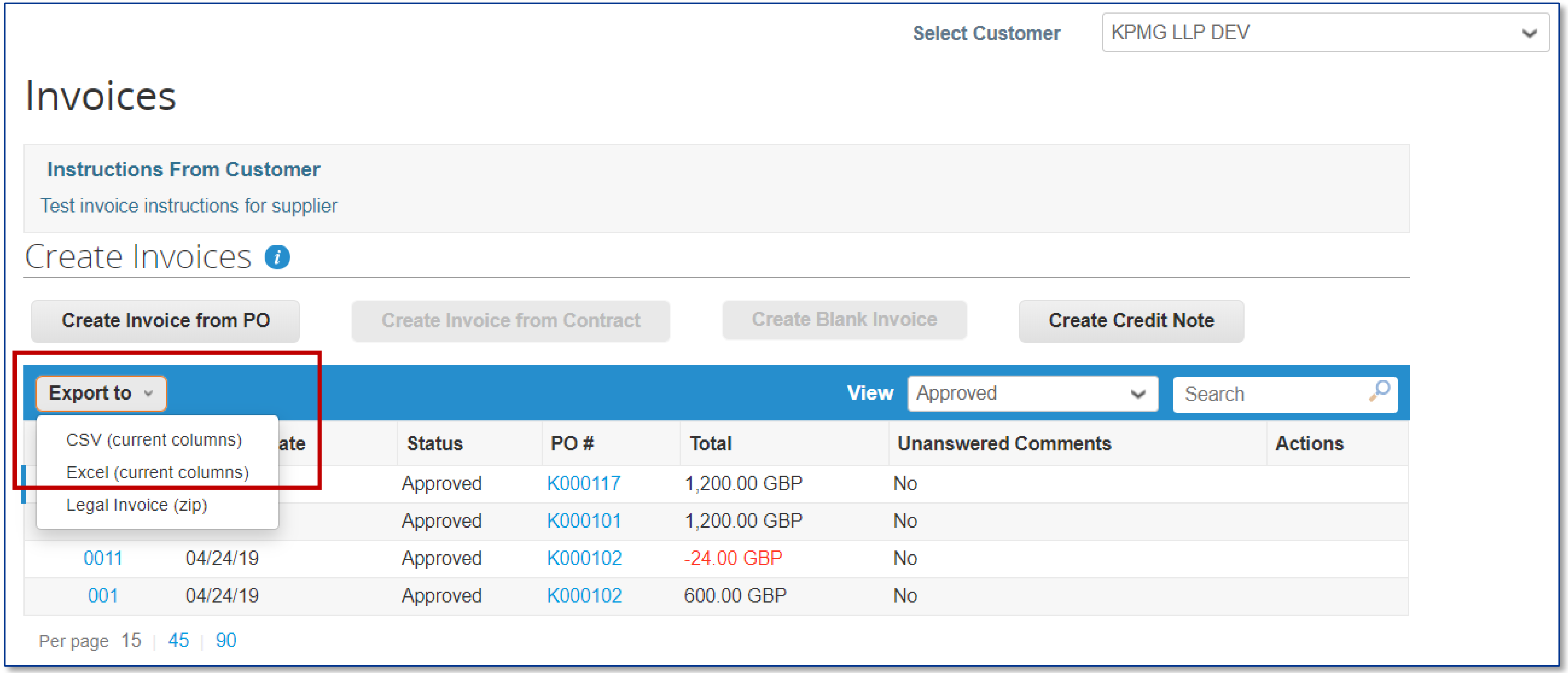
8. **Sort By:** Allows you to sort your data by specific crieria.

9. Click **Save** to save the report.



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.

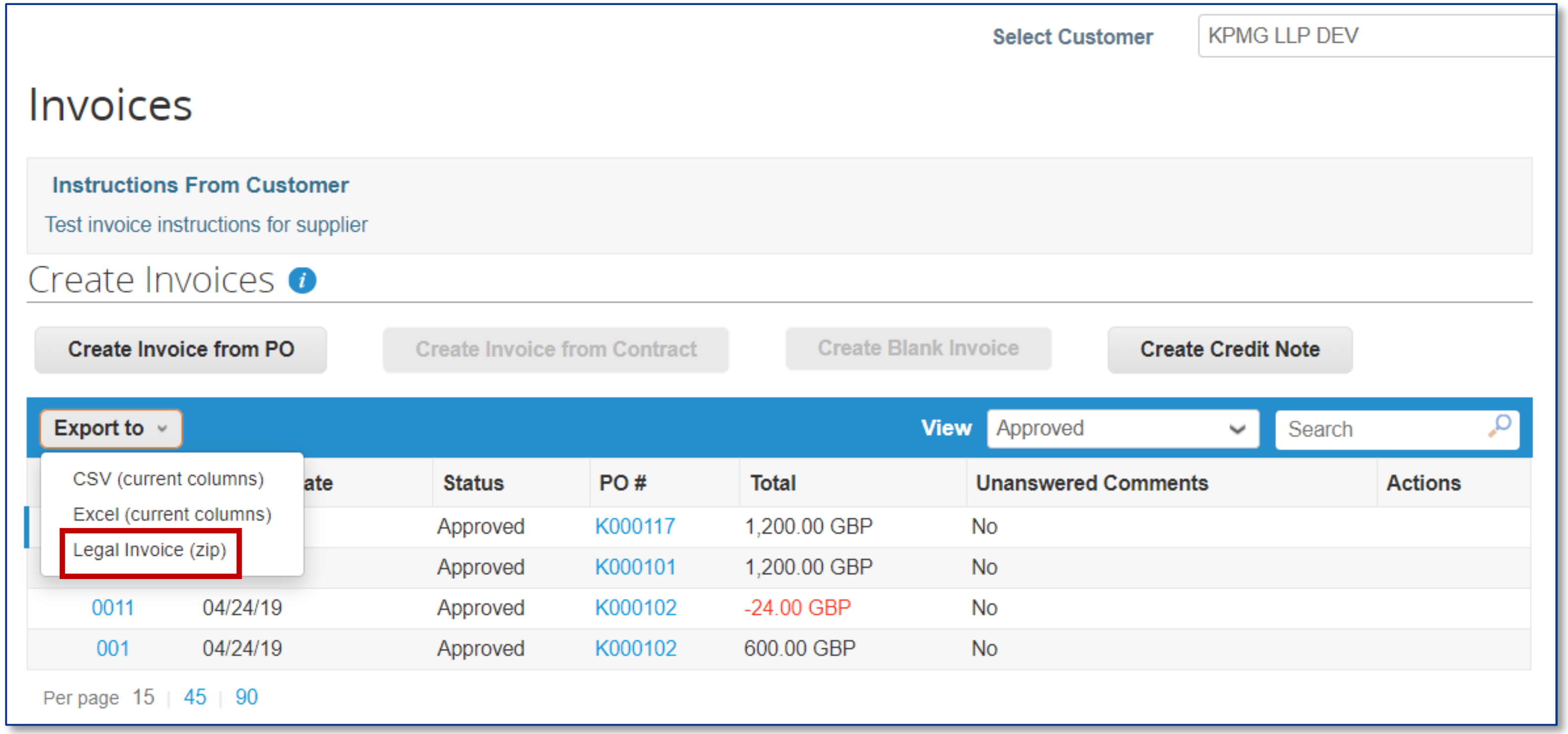


Downloading invoices

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.

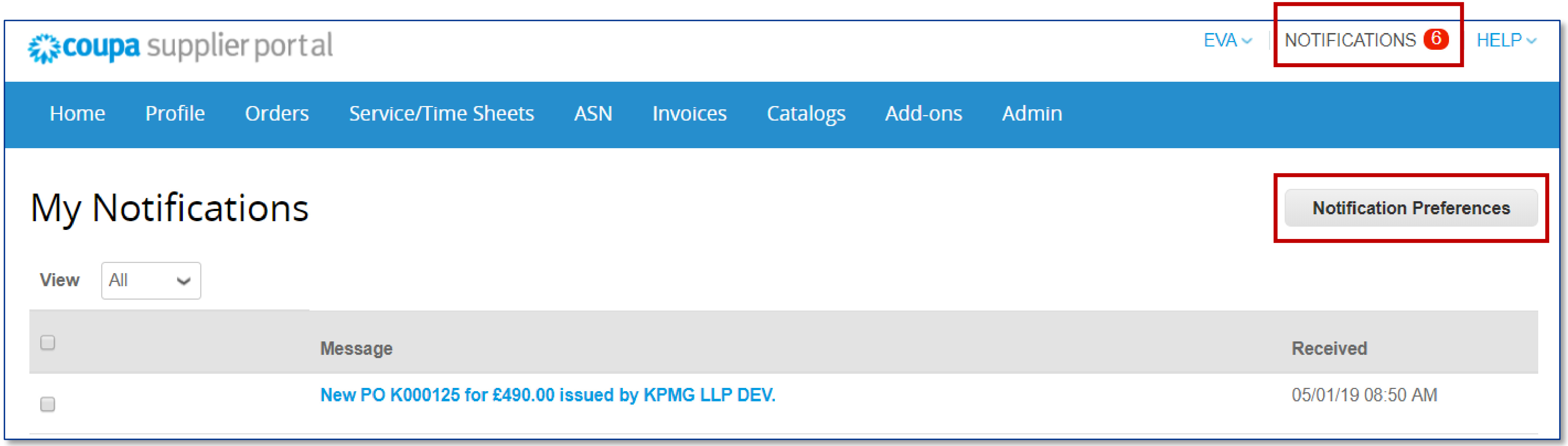
if you would like to keep your legal invoices in the CSP, you must consider whether it complies with any local storage rules and regulations in your jurisdiction before doing so.



Managing notifications

Managing notifications

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



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	☑ Online	☑ Email	☐ SMS
A catalog is approved	☐ Online	☐ Email	☐ SMS
A catalog is rejected	☐ Online	☐ Email	☐ SMS
A catalog is about to expire	☐ Online	☐ Email	☐ SMS

Coupa Accelerate

New Early Pay Customer	☑ Online	☑ Email	☐ SMS

Coupa Pay

New digital check	☑ Online	☑ Email	☐ SMS

Form Responses

A form response is approved	☑ Online	☑ Email	☐ SMS
A form response is rejected	☑ Online	☑ Email	☐ SMS
Supplier information is updated	☑ Online	☑ Email	☐ SMS
A new comment is received	☐ Online	☐ Email	☐ SMS
A form response needs your attention	☑ Online	☑ Email	☐ SMS

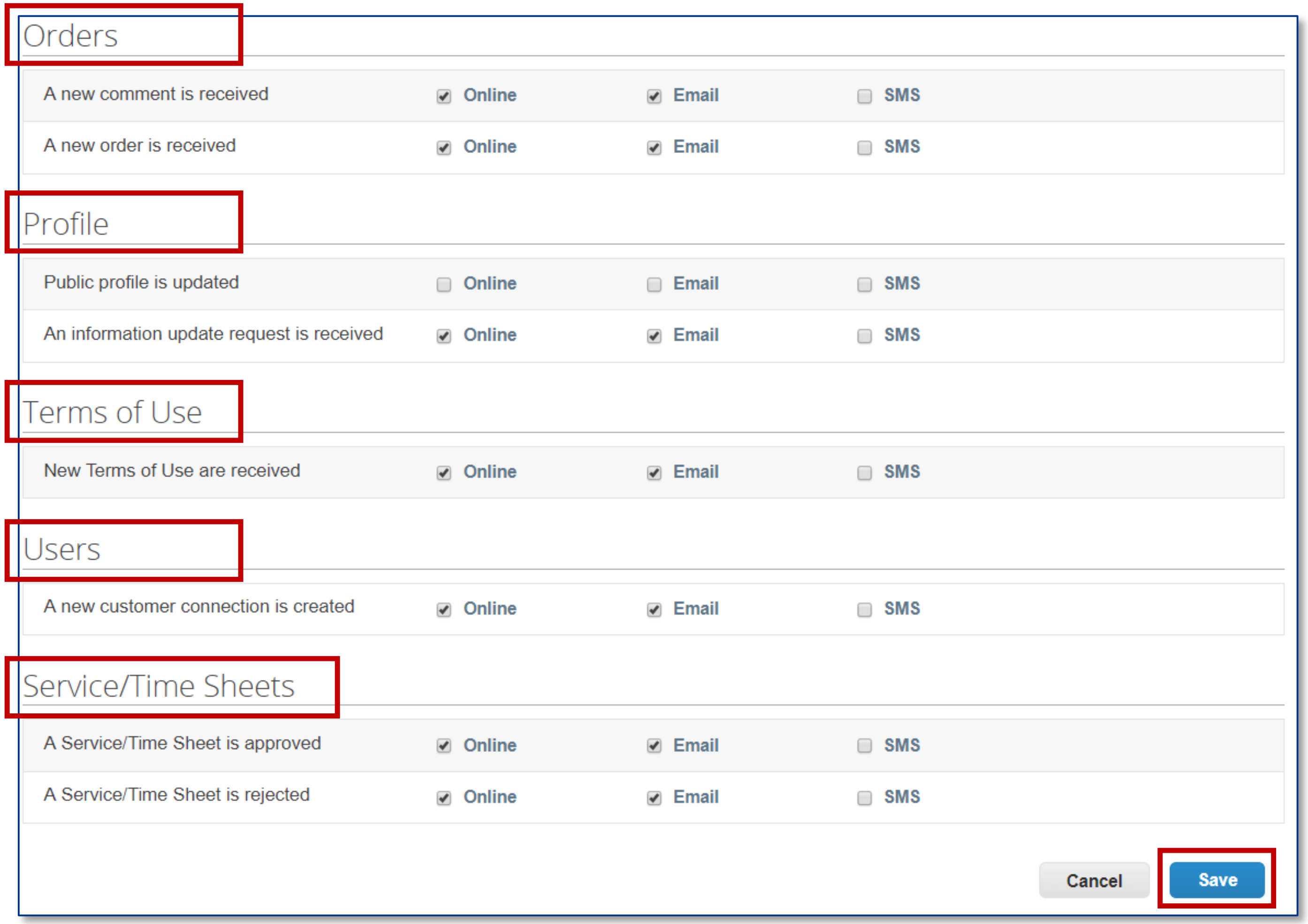
Invoices

A new comment is received	☑ Online	☑ Email	☐ SMS
An invoice is approved	☑ Online	☑ Email	☐ SMS
An invoice is paid	☑ Online	☑ Email	☐ SMS
An invoice is disputed	☑ Online	☑ Email	☐ SMS
An invoice is withdrawn from dispute	☑ Online	☑ Email	☐ SMS
Legal Invoice Export Ready	☑ Online	☑ Email	☐ SMS
An invoice is abandoned	☑ Online	☑ Email	☐ 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.



Thank you

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