



# Navigating the CSP & creating reports and notifications

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

—  
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.

coupa supplier portal

EVA | NOTIFICATIONS 6 | HELP

1 3 4

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

5 TEST EW

About Industry Website Established Employees Other information technology and... 5-24

Improve Your Profile

6 Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

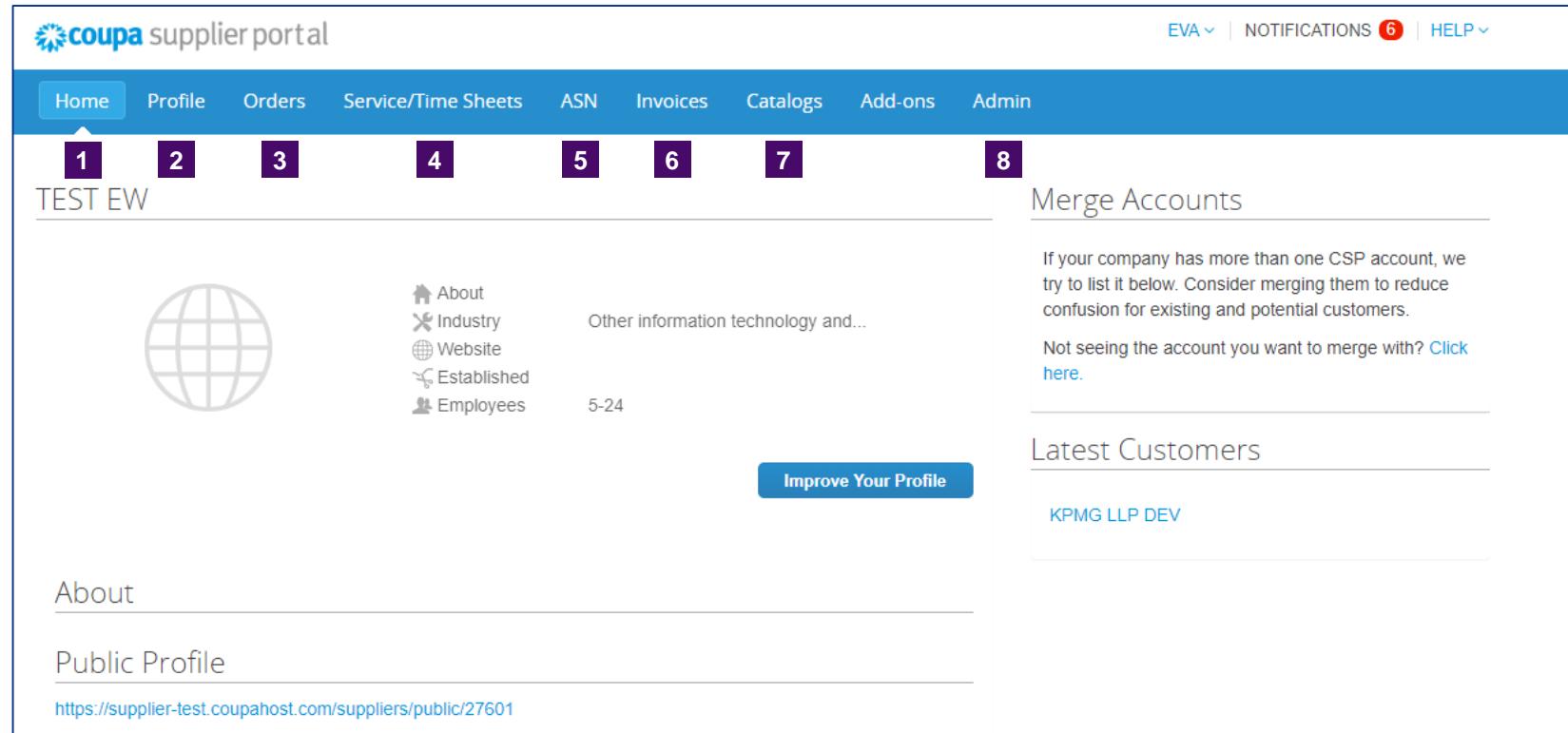
Latest Customers

KPMG LLP DEV

<https://supplier-test.couphost.com/suppliers/public/27601>

# 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 LLP).



The screenshot shows the Coupa supplier portal home page. At the top, there is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The Home link is highlighted. Below the navigation bar, there is a grid of numbered boxes (1-8) corresponding to the menu items listed on the left. The boxes are arranged in two rows: the first row contains boxes 1, 2, 3, 4, 5, 6, 7, and 8; the second row contains box 8. The boxes are labeled with the following text:

- 1 TEST EW
- 2
- 3
- 4
- 5
- 6
- 7
- 8

Below the grid, there is a section titled "About" with a globe icon. It includes links to "About", "Industry", "Website", "Established", and "Employees". It also shows "Other information technology and..." and "5-24". A blue button labeled "Improve Your Profile" is located in this section. Below the "About" section, there are links to "Public Profile" and a URL: <https://supplier-test.couphahost.com/suppliers/public/27601>. To the right of the grid, there are sections for "Merge Accounts" (with a note about merging accounts for a company with multiple CSP accounts) and "Latest Customers" (with a link to "KPMG LLP DEV").

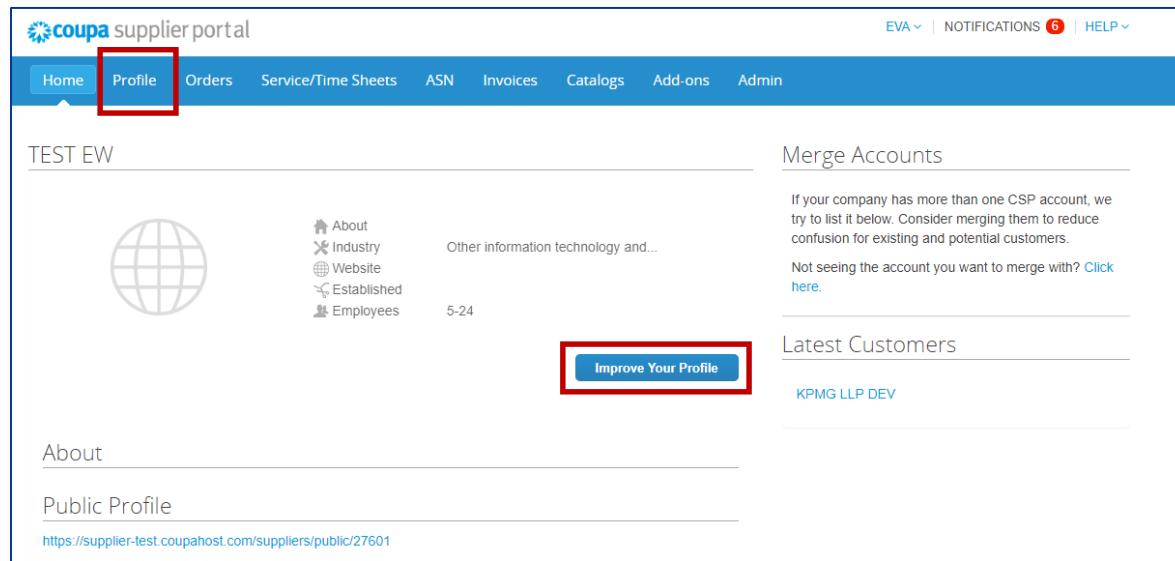
**6. Invoices:** Access the invoices section to view and submit invoices.

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

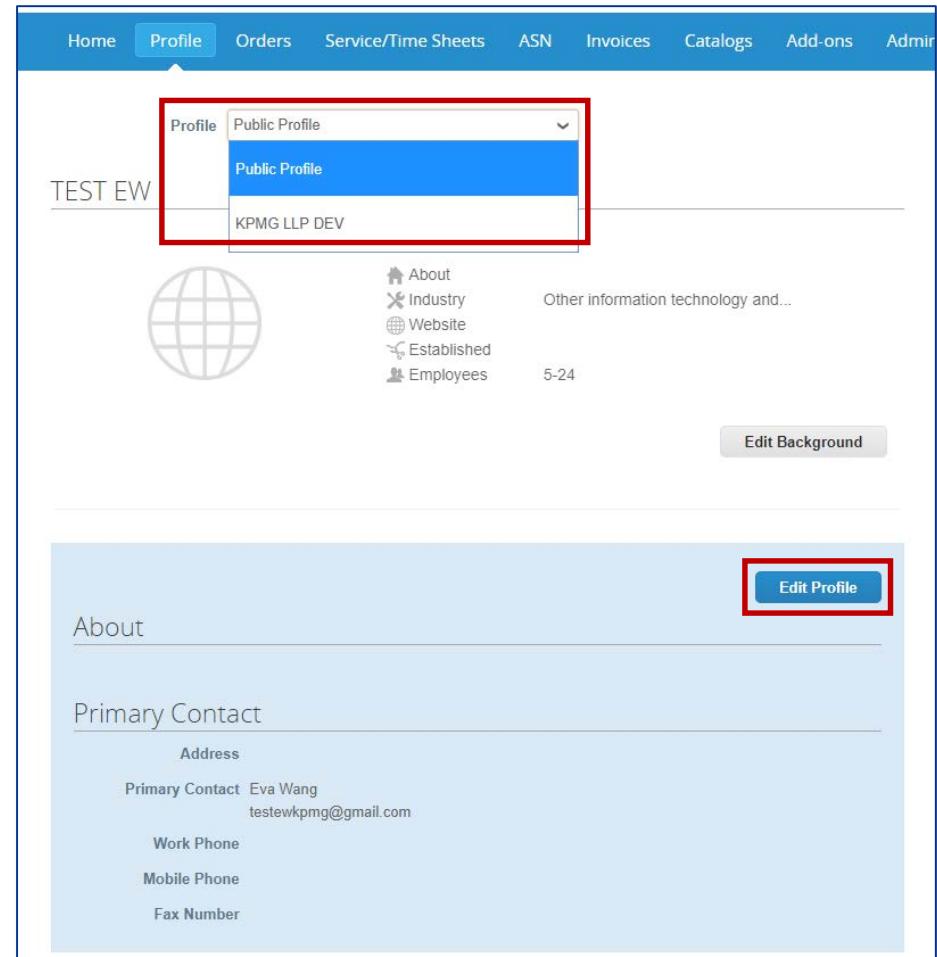
**8. Admin:** Allows you to maintain your admin settings: invite additional users, set a remit to address, etc.

# 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.



The screenshot shows the Coupa Supplier Portal homepage. The top navigation bar includes links for Home, Profile (which is highlighted with a red box), Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation, the user is identified as 'TEST EW'. On the left, there's a 'About' section with icons for About, Industry, Website, Established, and Employees, and a '5-24' status. In the center, there's a 'Merge Accounts' section with a note about merging accounts and a 'Click here' link. Below that is a 'Latest Customers' section showing 'KPMG LLP DEV'. At the bottom, there are 'About' and 'Public Profile' sections, with a link to the public profile page: <https://supplier-test.couphost.com/suppliers/public/27601>. A red box highlights the 'Improve Your Profile' button.



The screenshot shows the 'Profile' page of the Coupa Supplier Portal. The top navigation bar includes Home, Profile (which is the active tab and highlighted with a red box), Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. A dropdown menu for 'Profile' is open, showing 'Public Profile' (which is highlighted with a red box) and 'KPMG LLP DEV'. Below the dropdown, there's an 'About' section with icons for About, Industry, Website, Established, and Employees, and a '5-24' status. On the right, there's a 'Primary Contact' section with fields for Address, Primary Contact (Eva Wang, evatestkpmg@gmail.com), Work Phone, Mobile Phone, and Fax Number. A red box highlights the 'Edit Profile' button.

# 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.**

General Information

**Save**

* Name	TEST EW
Logo	<input type="button" value="Choose file"/> No file chosen
Industry	Other information technology and computer ...
Year Established	
Short Description	
About	
Employees	5-24
Web Site	
LinkedIn Profile	<a href="http://www.linkedin.com/company/99695">http://www.linkedin.com/company/99695</a>
Facebook Profile	<a href="http://www.facebook.com/yourcompany">http://www.facebook.com/yourcompany</a>
Twitter Profile	<a href="http://www.twitter.com/yourcompany">http://www.twitter.com/yourcompany</a>
Alibaba Profile	<a href="http://www.us10119782.fm.alibaba.com">http://www.us10119782.fm.alibaba.com</a>

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

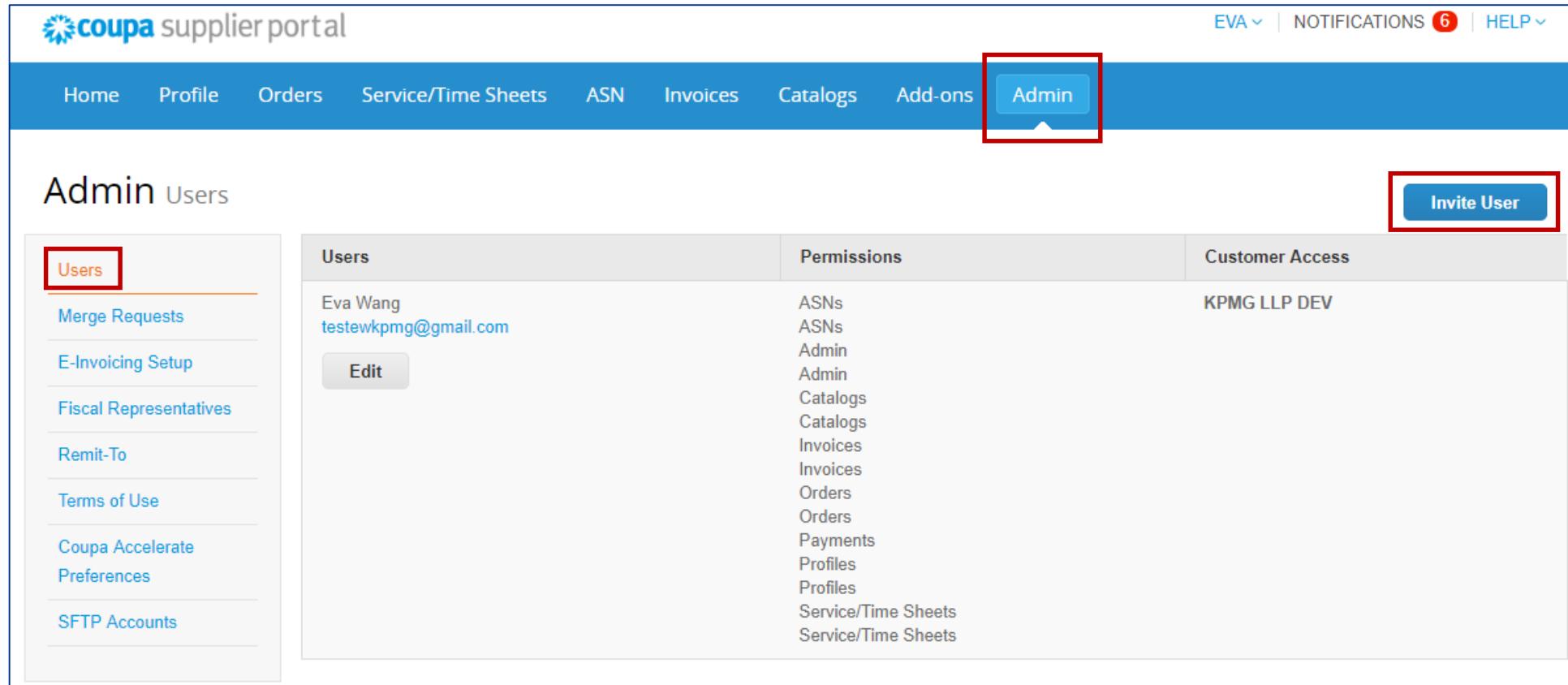
**Save**



# 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.



The screenshot shows the Coupa supplier portal's Admin interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The Admin link is highlighted with a red box. The main content area is titled "Admin Users". On the left, a sidebar menu has "Users" highlighted with a red box. The main table has three columns: "Users", "Permissions", and "Customer Access". One row is shown for "Eva Wang" with the email "testewkpmg@gmail.com". The "Permissions" column lists various roles and access levels, and the "Customer Access" column shows "KPMG LLP DEV". A red box highlights the "Invite User" button in the top right corner of the main content area.

Users	Permissions	Customer Access
Eva Wang testewkpmg@gmail.com  <a href="#">Edit</a>	ASNs ASNs Admin Admin Catalogs Catalogs Invoices Invoices Orders Orders Payments Profiles Profiles Service/Time Sheets Service/Time Sheets	KPMG LLP DEV

# 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/unchecked 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.

**Invite User**

First Name

Last Name

\* Email

**Permissions** **Customers**

All  All

Admin  KPMG LLP DEV

Orders

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Payments

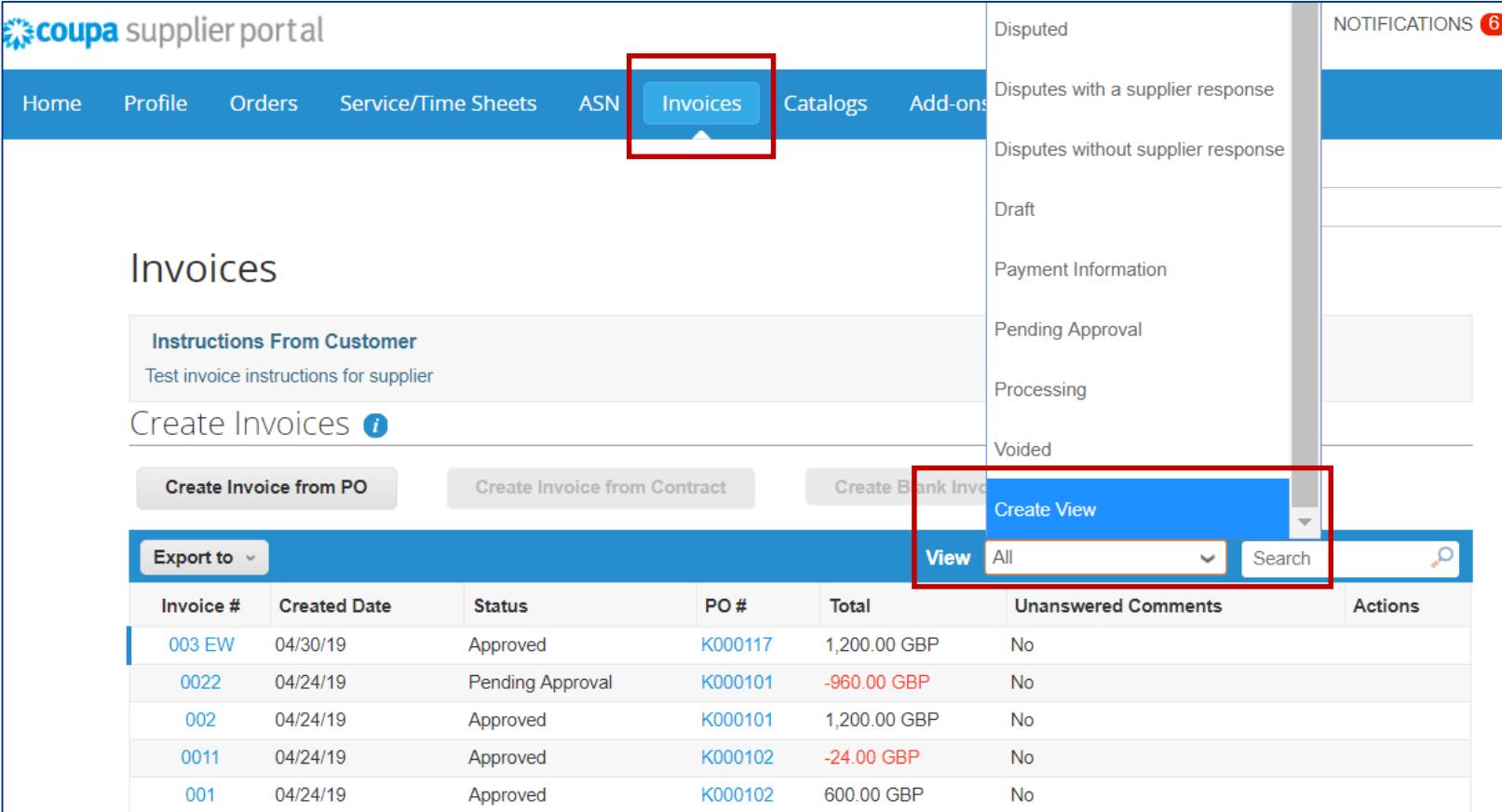


# Creating reports & downloading invoices

# 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**.



The screenshot shows the Coupa supplier portal interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices** (which is highlighted with a red box), Catalogs, and Add-ons. To the right of the navigation is a sidebar for Disputed, Disputes with a supplier response, Disputes without supplier response, Draft, Payment Information, Pending Approval, Processing, and Voided. A NOTIFICATIONS section shows 6 notifications. The main content area is titled 'Invoices' and contains a section for 'Instructions From Customer' with the text 'Test invoice instructions for supplier'. Below this is a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', and 'Create Blank Invoice'. A 'View' dropdown menu is open, showing 'Create View' (highlighted with a red box), 'All', and 'Search'. The main table lists five invoices with the following data:

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 specific 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 organization will be able to see your report.
- 4. Start with View:** Allows you to set a starting condition for your report (i.e. start with all ordered requisitions).

Create New data table view

**General**

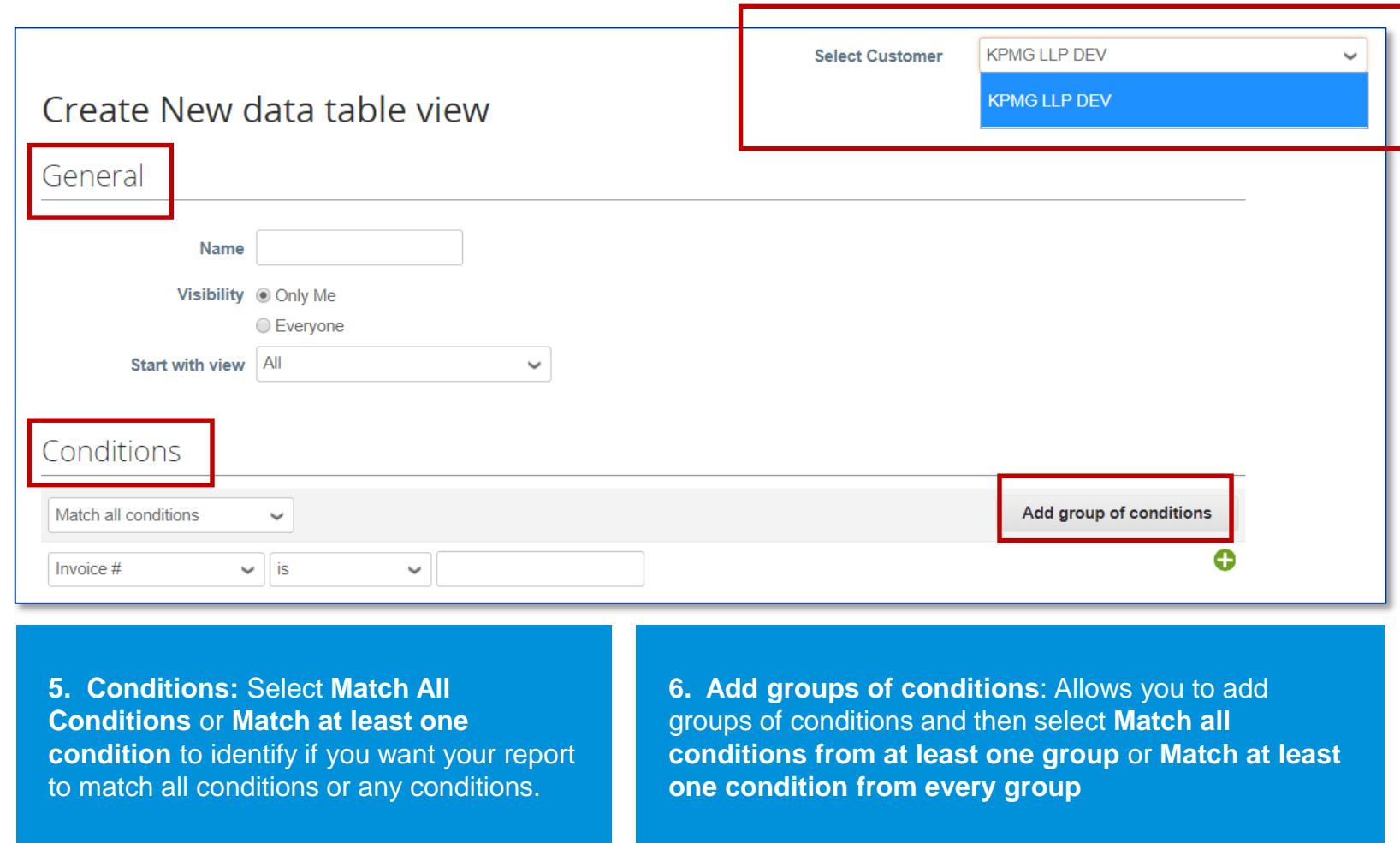
**Select Customer** KPMG LLP DEV

**Conditions**

**Add group of conditions**

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	Invoice #
Comments	Created Date
Date Of Supply	Status
Delivery Number	PO #
Dispute Reason	Total
Disputed Date	Unanswered Comments
Document Type	Actions
Invoice Date	
Linked Document	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	

**Default Sort Order**

Sort by  in  order.

# 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** CSV (current columns) Excel (current columns) Legal Invoice (zip)

	Status	PO #	Total	Unanswered Comments	Actions
0011	Approved	K000117	1,200.00 GBP	No	
001	Approved	K000101	1,200.00 GBP	No	
0011	Approved	K000102	-24.00 GBP	No	
001	Approved	K000102	600.00 GBP	No	

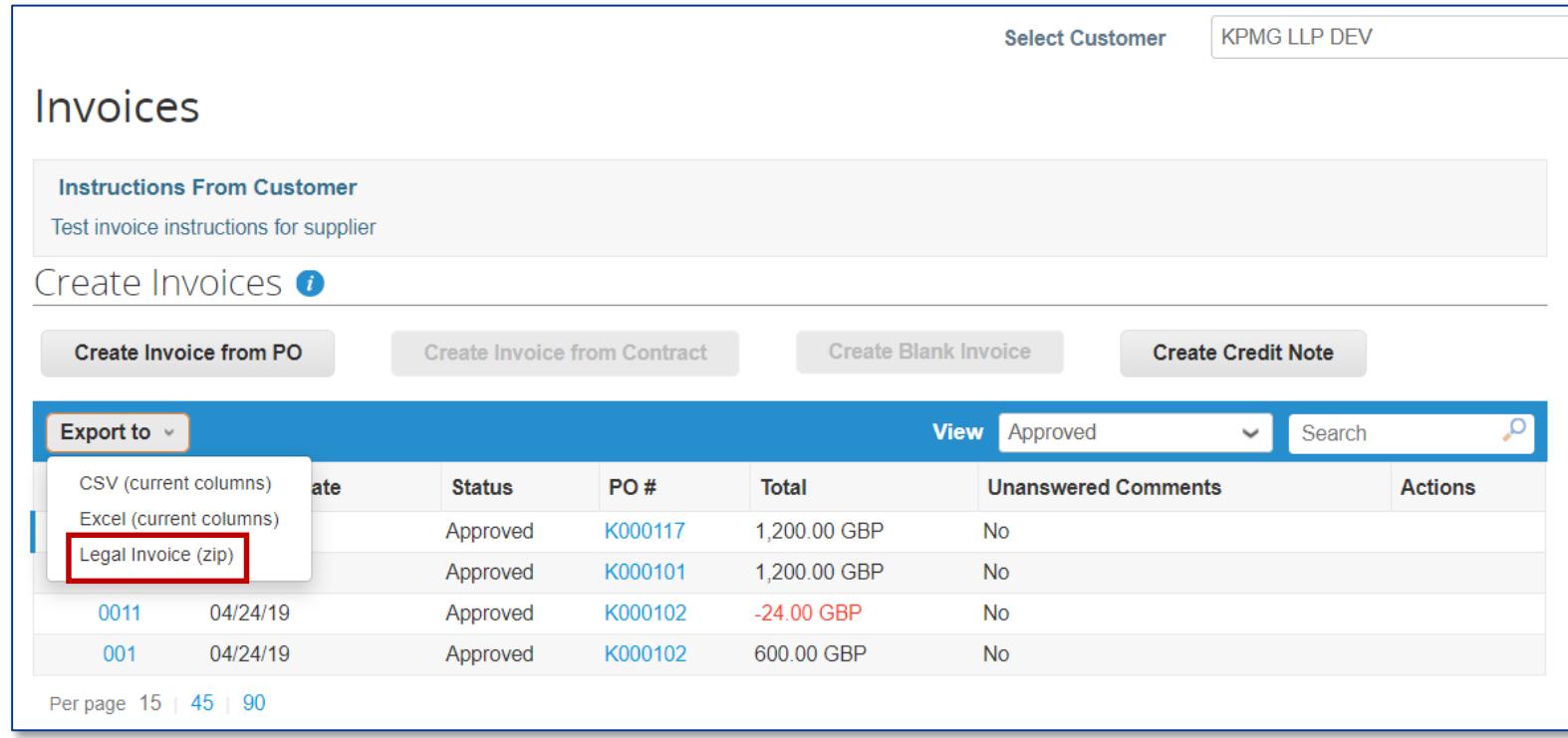
Per page [15](#) | [45](#) | [90](#)

# 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.



The screenshot shows the Coupa Invoices page. At the top right, there are buttons for 'Select Customer' (set to 'KPMG LLP DEV') and 'Create Invoice'. Below these are sections for 'Instructions From Customer' (containing 'Test invoice instructions for supplier') and 'Create Invoices' (with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'). The main area is a table of invoices. The 'Export to' dropdown menu is open, showing options: 'CSV (current columns)', 'Excel (current columns)', and 'Legal Invoice (zip)', with 'Legal Invoice (zip)' highlighted with a red box. The table has columns for Date, Status, PO #, Total, Unanswered Comments, and Actions. The data in the table is as follows:

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

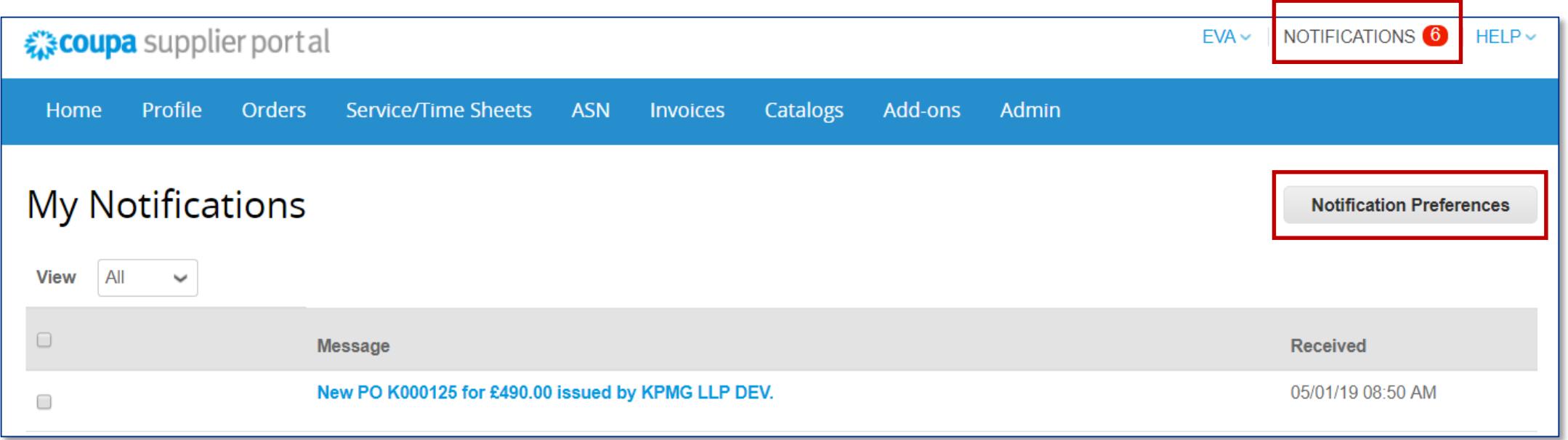
At the bottom left of the table area, there is a 'Per page' dropdown set to '15' with options '45' and '90'.



# Managing notifications

# Managing notifications

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

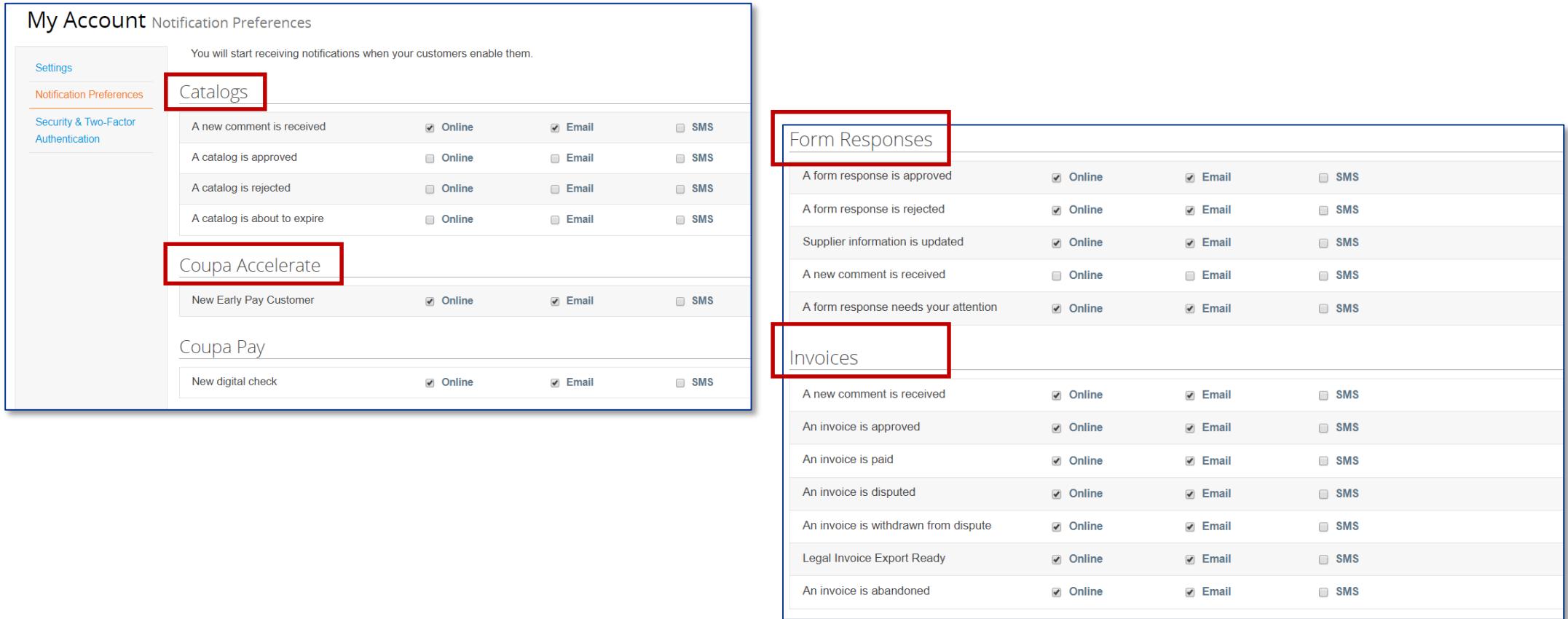


The screenshot shows the Coupa supplier portal interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. On the far right of the top bar are links for EVA, NOTIFICATIONS (with a red box around it and a '6' notification badge), and HELP. The main content area is titled 'My Notifications'. It features a 'View' dropdown set to 'All' with a dropdown arrow. Below this is a table with two rows. The first row has a checkbox, the text 'Message', and the status 'Received'. The second row has a checkbox, the text 'New PO K000125 for £490.00 issued by KPMG LLP DEV.', and the timestamp '05/01/19 08:50 AM'. A 'Notification Preferences' button is located in the top right corner of the 'My Notifications' section, also highlighted with a red box.

	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

**Catalogs**

You will start receiving notifications when your customers enable them.

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
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**Coupa Pay**

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



Thank you



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