How to Navigate and Use the Coupa Supplier Portal (CSP)

Coupa

*For the best learning experience, please click the **Editing** button and select **Open in Desktop** to view this document in your desktop application of Microsoft Word. Viewing this document in SharePoint or in-browser may distort the placement of images and text.*

Contents

This icon indicates there are further policy or business process details relating to a step. Click on the provided link(s) placed throughout the QRC for more information.

Your screen in the Coupa Supply Portal may differ slightly from this training, but the steps to complete the activity will be the same.

Purpose

This Quick Reference Card (QRC) explains the process for how Suppliers perform multiple tasks within the Coupa Supplier Portal such as configure Purchase Order (PO) transmission preferences, create online catalogs and electronic invoices and view Purchase Orders.

Key Terms

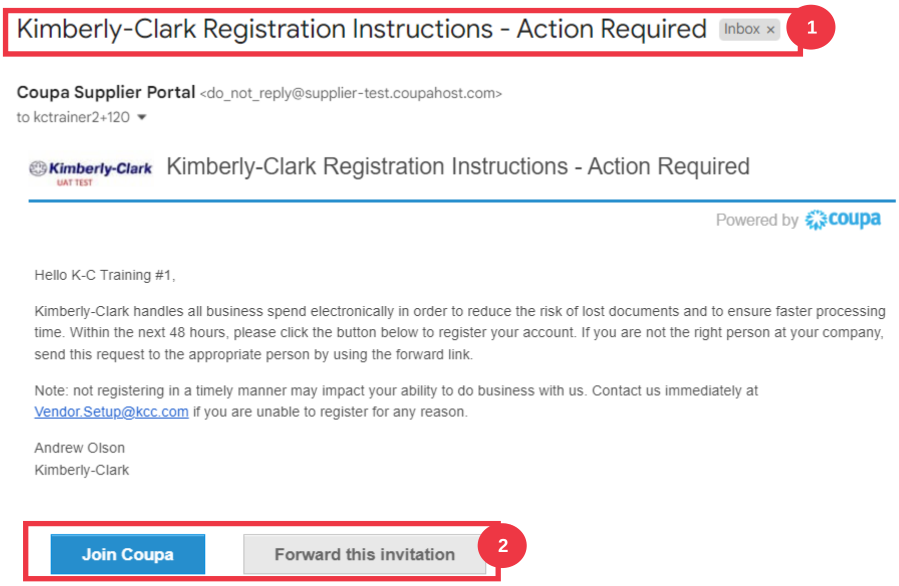
- The **Coupa Supplier Portal** is a web portal designed to assist suppliers in managing their business transactions with Kimberly-Clark (K-C).
- The **Advance Shipping Notice** is an electronically communicated notification of shipment of goods from suppliers to their customers.
- An **Invoice** is a billing document issued from suppliers to Kimberly-Clark stating the financial obligations owed for goods received or services performed.
- A **Disputed Invoice** is a billing document rejected by Kimberly-Clark to a supplier for readmittance of a new invoice.
- A **Credit Note** is an invoice submitted from a supplier to Kimberly-Clark with a negative value as an offer of credit or to resolve a disputed invoice.
- A **Purchase Order (PO)** is a commercial document issued by a buyer to a seller as a commitment to purchase goods or services in agreed upon types, quantities, and prices.

[Return to Table of Contents](#)

How to Register for the CSP

Registering with Coupa Supplier Portal (CSP) will connect you to transacting with Kimberly-Clark. The steps below outline the preferred and only process K-C accepts to onboard suppliers through CSP.

1. You will receive an email invitation from K-C with the subject line: **Kimberly-Clark Registration Instructions – Action Required**
2. Click the **Join Coupa** button from the invitation email or Forward this invitation if you are not the right contact within your company



**Please note that the message you receive may be slightly different from the above screenshot*

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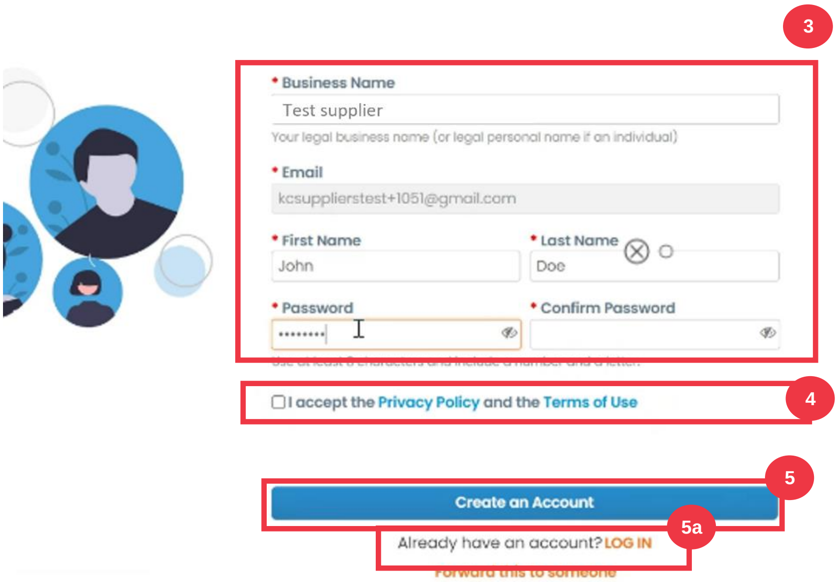
3. Enter the following information for the following fields (required fields are indicated by a red asterisk *). Provide your, **Business Name**, **Email address**, **First Name** (primary contact), **Last Name** (primary contact), and **Password** (alphanumeric, minimum 8 characters)
4. Select the **Privacy Policy and the Terms of Use** checkbox (this is a requirement).

Note: The legal terms of use list the terms and conditions for using e-invoicing through Coupa and the CSP. You as a supplier, especially if you are responsible for managing legal tax invoices, are required to have read, assessed and agreed to these terms of use and to be aware of your responsibilities towards the content and handling of these invoices.

5. Click the **Create an Account** button when complete.
   a. Click the **LOG IN** link (if you have an existing CSP account).



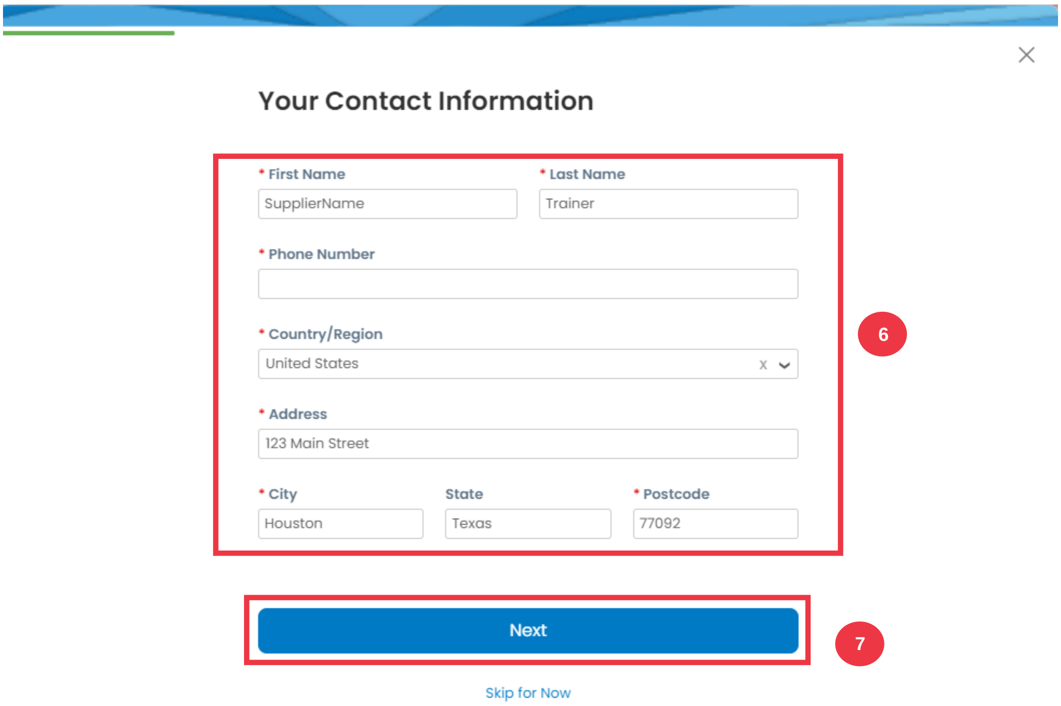
Note: Your CSP account is based on a specific email address. If you use an email address different from the one that K-C has on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

Please continue to the next page.

> **Note:** If you need translation assistance, Google Chrome and Microsoft Edge offer free translation browser extensions, however, it is your responsibility to ensure the information provided back to Kimberly-Clark is accurate

6. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **First and Last Name, Phone Number, Country/Region, Address, City, State, Postal code.**

7. Click **Next** button.



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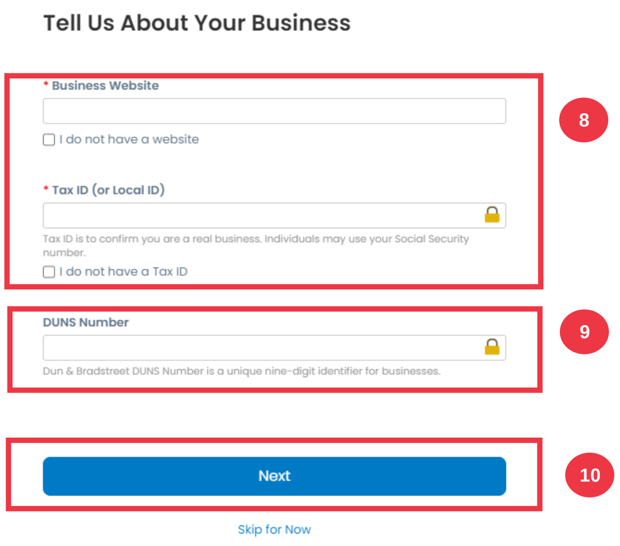
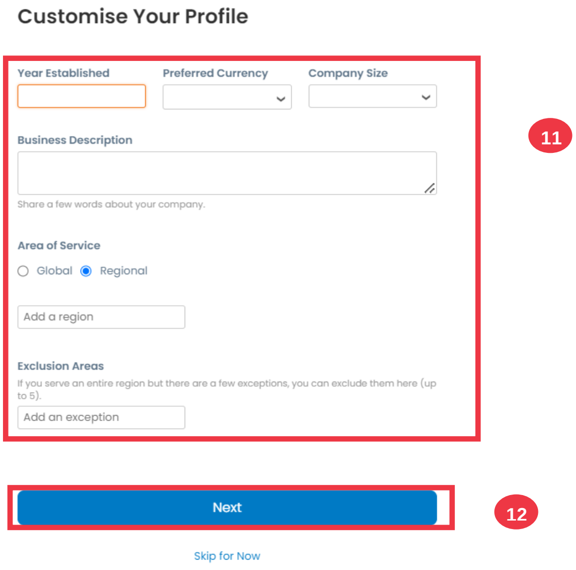
8. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **Business Website, Tax ID.** Select **I do not have a website,** or **I do not have a Tax ID** if this is not applicable for your company.

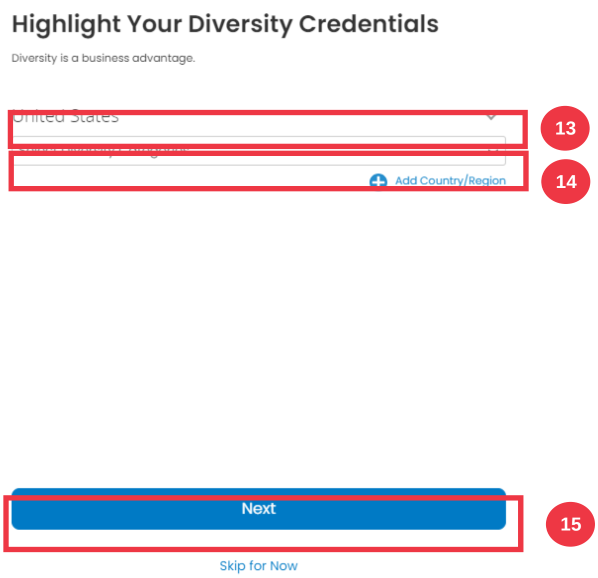
9. Enter the following information about your business (required fields are indicated by a red asterisk *): **DUNS Number**, if your company have Dun & Bradstreet DUNS Number.
10. Click **Next** Button.



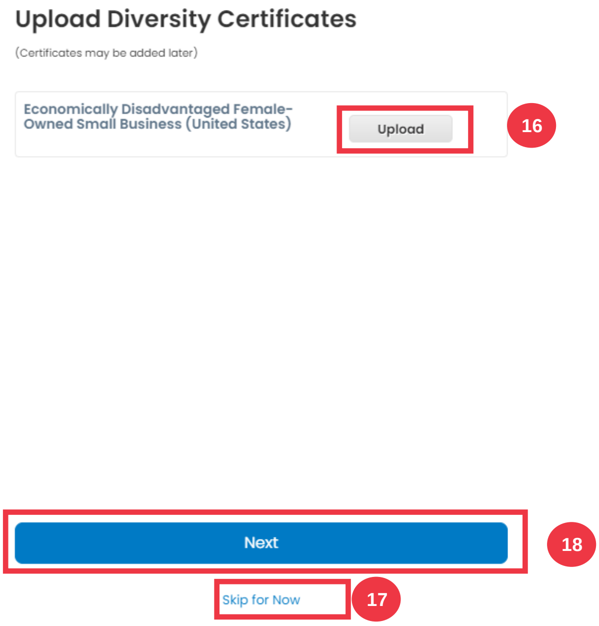
11. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **Year Established, Preferred Currency, Company Size, Business Description, Area of Service, Exclusion Areas.**
12. Click **Next** button.



13. Choose your country.
14. Choose Diversity Categories applicable for your company.
15. Click **Next button**.

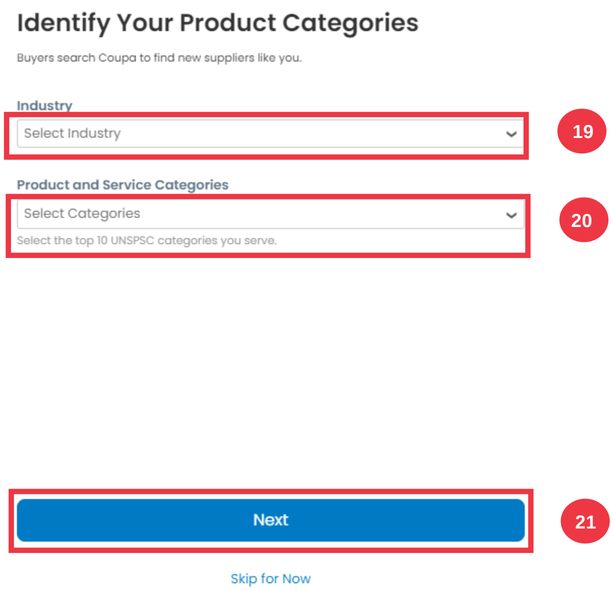


16. Click **Upload** button to upload diversity certificates.
17. Click **Skip for Now** to bypass this step and upload your Diversity Certificates on a later stage.
18. Click **Next** button.

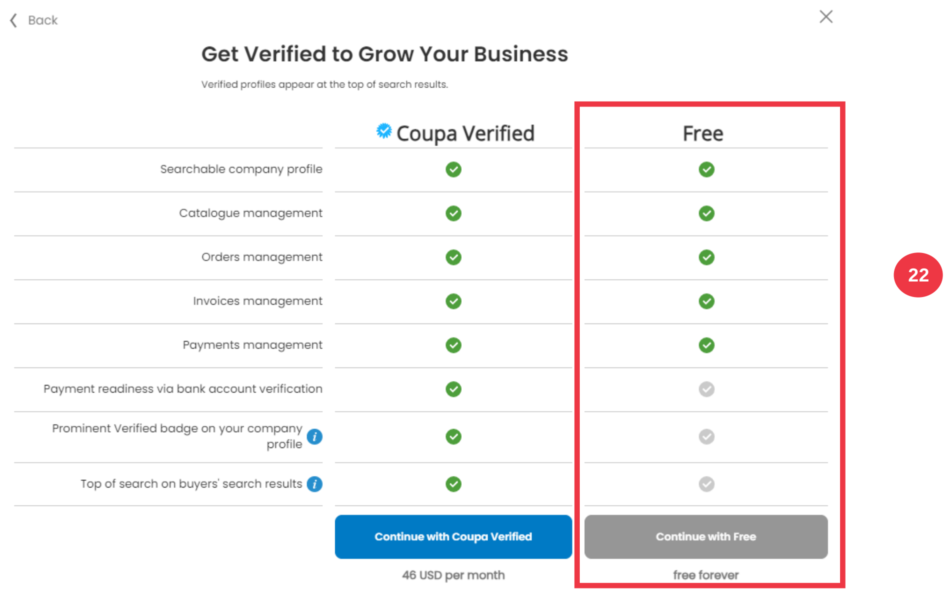


19. Choose industry applicable for your company.
20. Choose categories of service that your company provides.

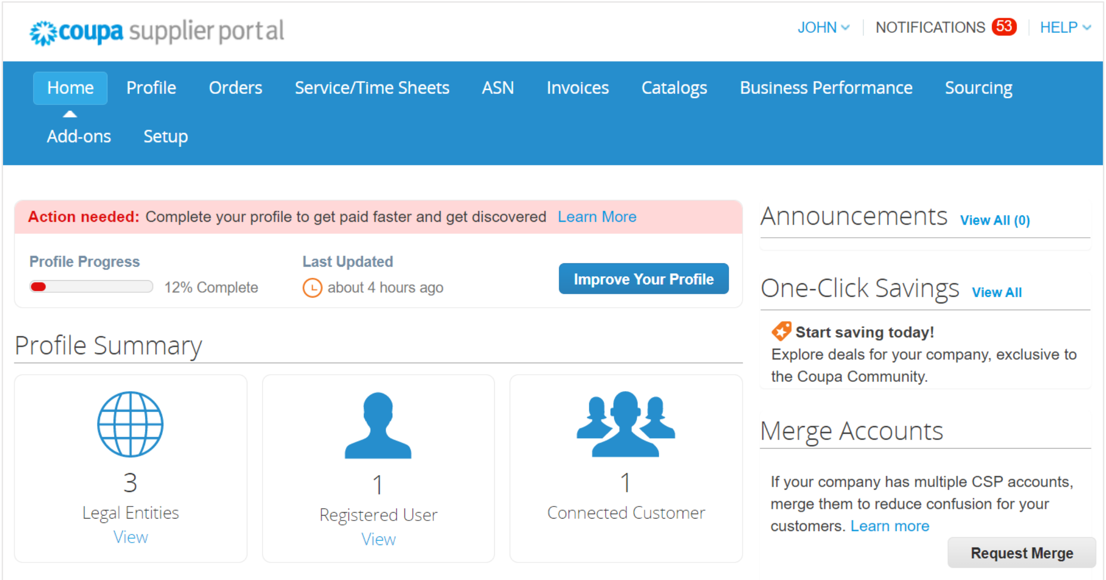
21. Click **Next** button.



22. Choose **Continue with Free** button.



After a successful registration, you will be directed to the **Coupa Supplier Portal (CSP) homepage**.



[Return to Table of Contents](#)

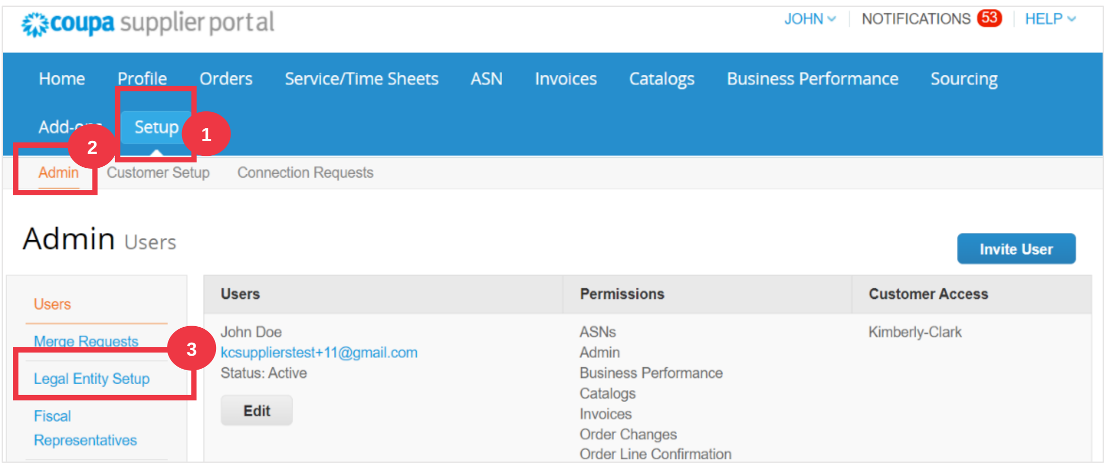
How to Setup Your Company as a Legal Entity in the CSP

In order to electronically invoice (either through CSP or via your actionable e-mail address provided during registration), your entity must be set-up as an established legal entity within CSP.

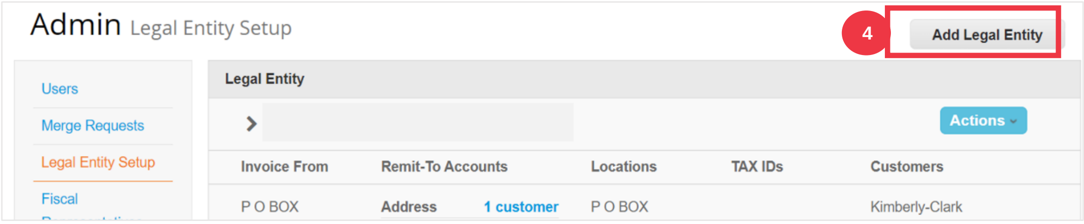
1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** subtab.

> **Note:** K-C requires that Suppliers with multiple legal entities set up their additional entities within the Coupa Supplier Portal. Suppliers with only one (1) legal entity can bypass this process.

3. Select **Legal Entity Setup.**

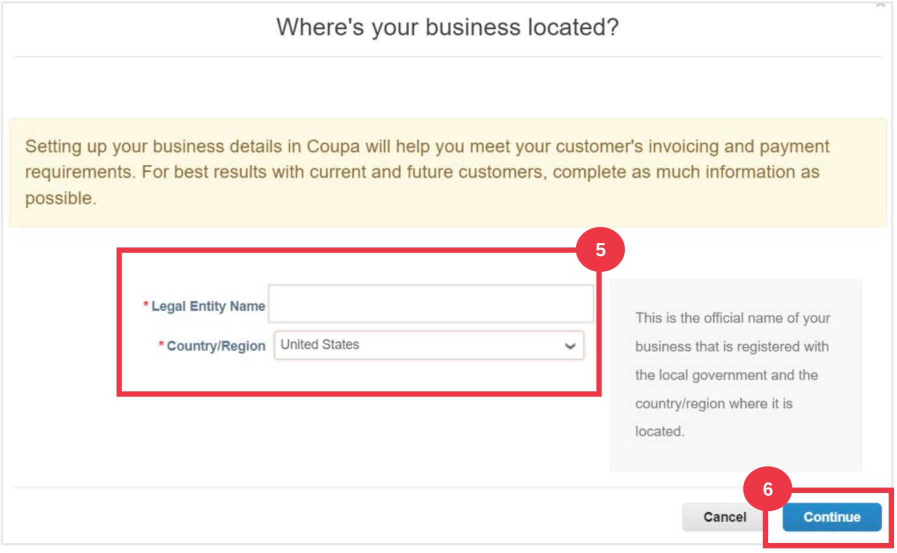


4. Click the **Add Legal Entity** button.

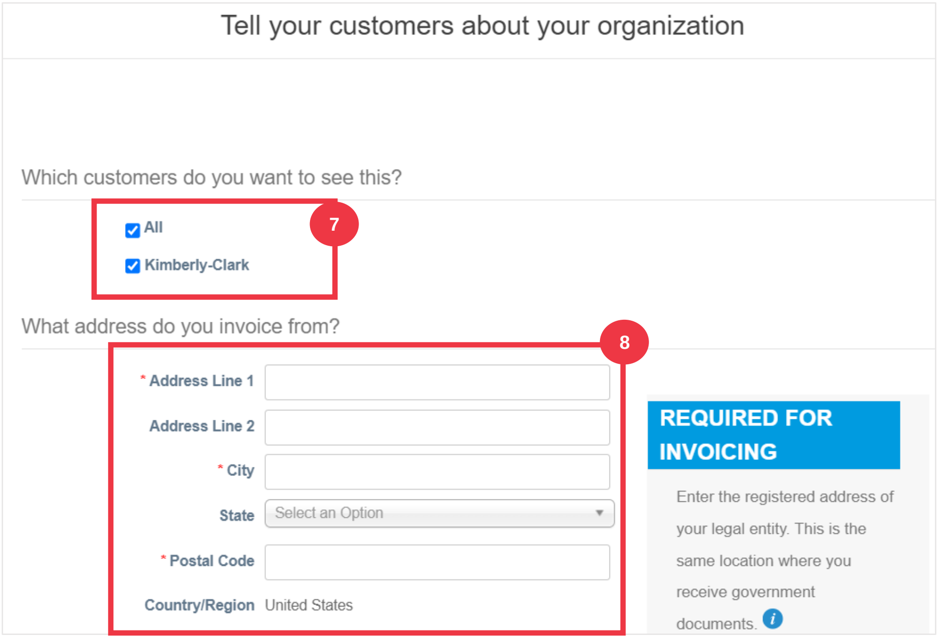


Note: Proceeding with the following steps ensures that if you participate in electronic invoicing, you are submitting a tax compliant invoice.

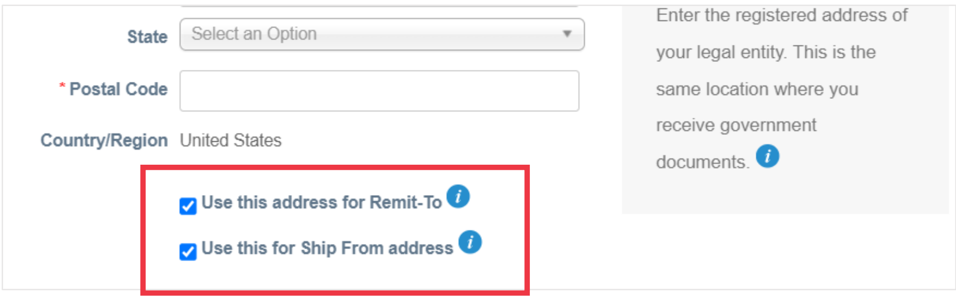
5. Enter the official name and country of your business as registered with the local government (required fields are indicated by a red asterisk *).
6. Click the **Continue** button.



7. Select Kimberly-Clark from **Customers** checkbox. ***All** may also be selected.*
8. Enter the registered address and tax identification information for your business (required fields are indicated by a red asterisk *).



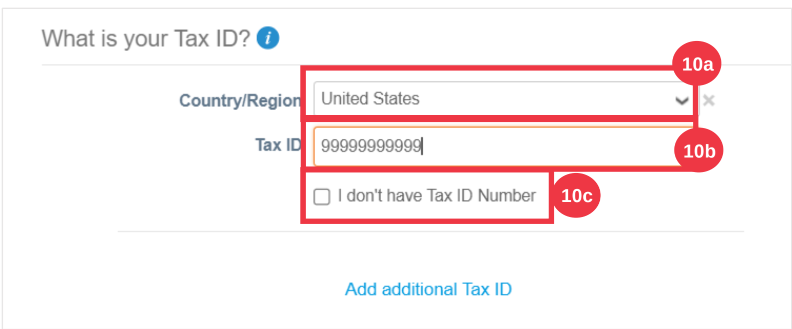
9. Deselect your **Remit-To** and **Ship-From** address as needed.
    a. Deselect the **Use this address for Remit-To** checkbox if you receive payment for invoices at a different address.
    b. Deselect the **Use this for Ship From** address checkbox if you ship from a different address.



Note:

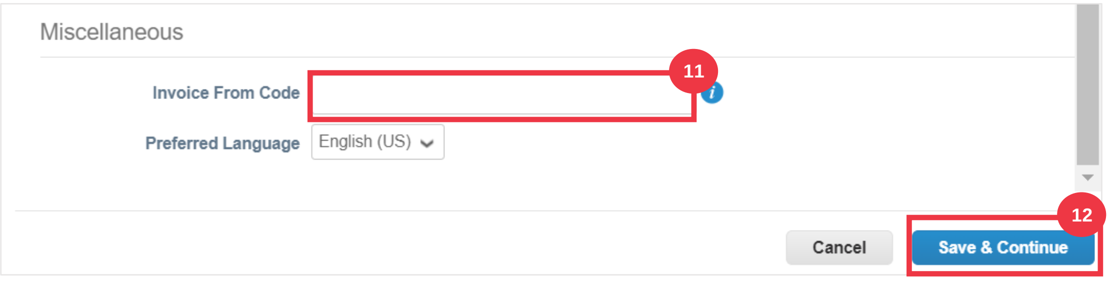
- **Remit-To** is the address where you want to receive payment (you can change this address should the need arise).
- K-C requires Suppliers to receive payment **only** via electronic form.
- **Ship-From** address is the address where you ship goods from (e.g., warehouse location)

10. Scroll down to the **Tax ID** section.
    a. Select your tax country/region from the **Tax Country/Region** drop-down list.
    b. Enter your **Tax ID** information.
    c. If you do not have a Tax ID, select the **I don't have a Tax ID Number** checkbox).

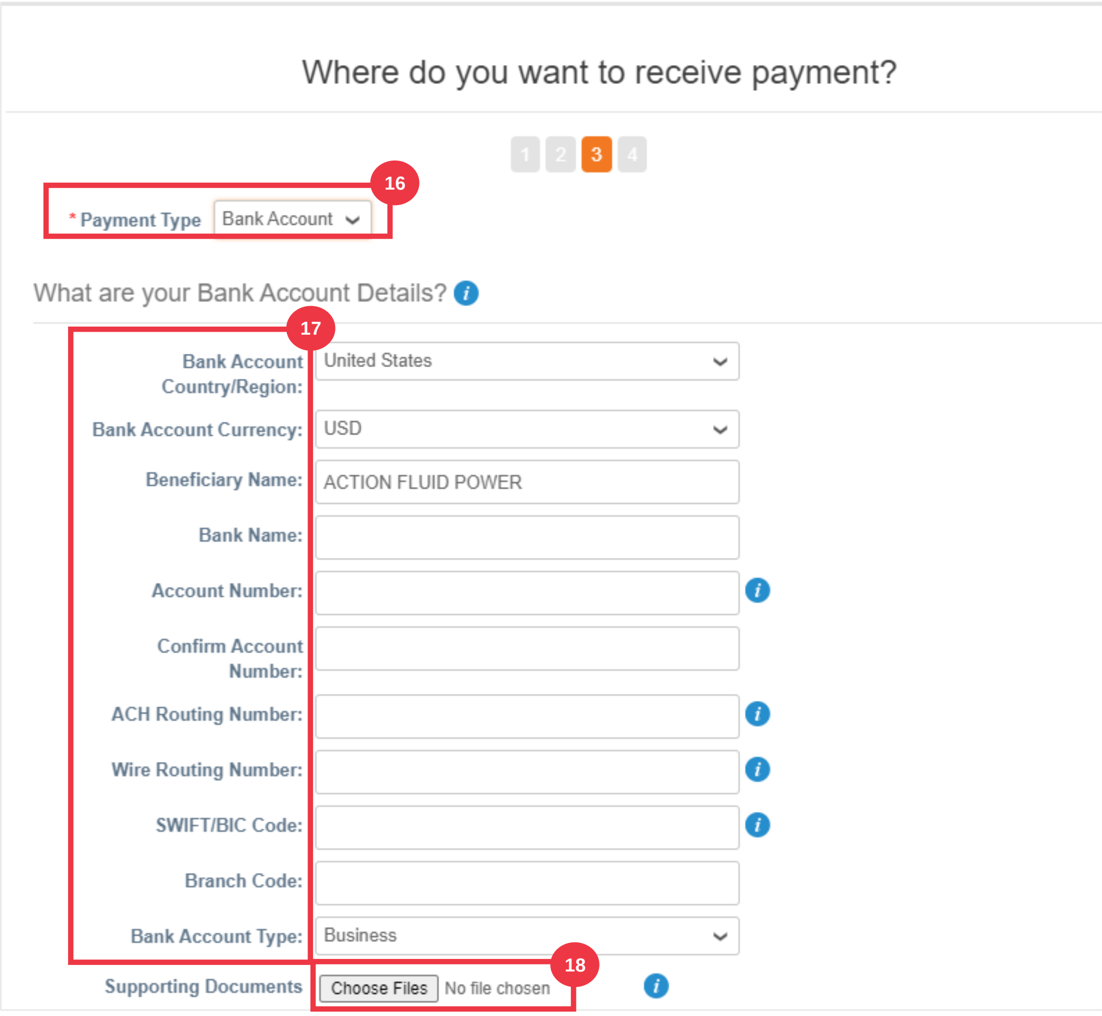


11. If applicable, enter an appropriate value in the **Invoice From Code** field to connect your CSP invoice-from address (registered address) with the corresponding address in your ERP.

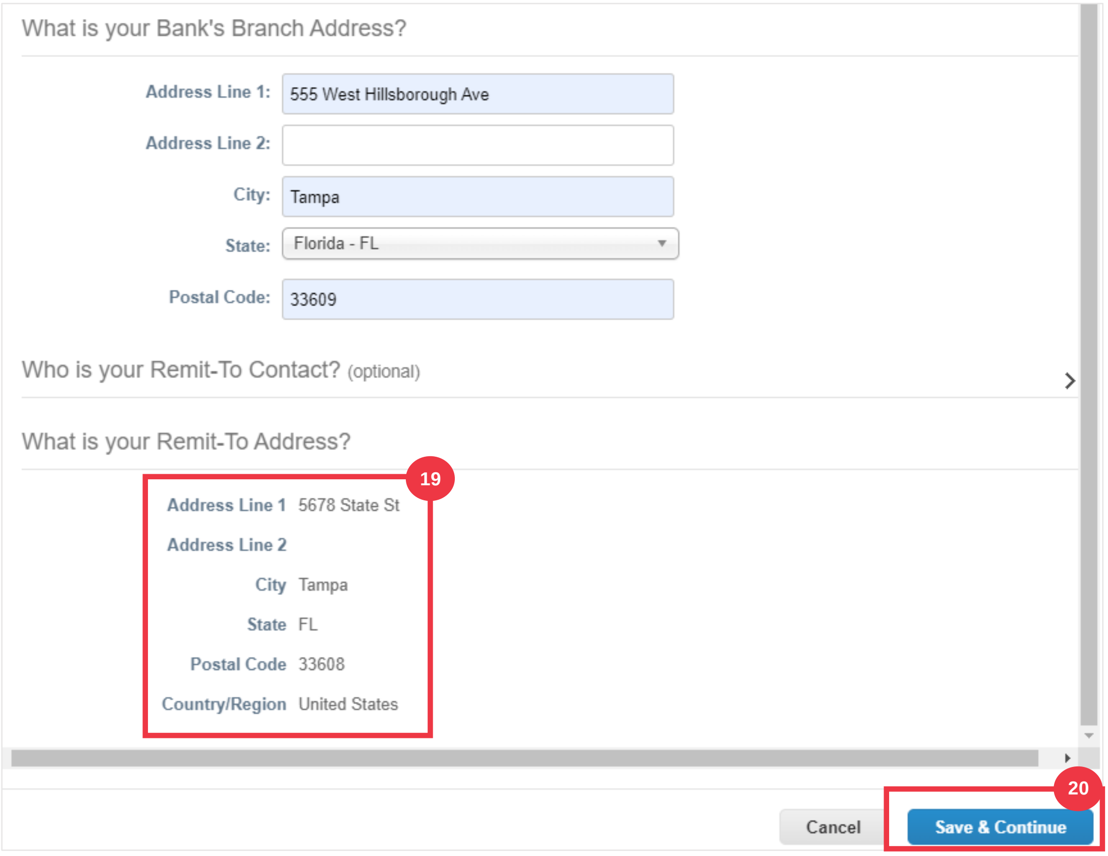
12. Click the **Save & Continue** button when complete.



16. In the next screen, select **Bank Account** from the **Payment Type** drop-down list.
17. Complete all applicable **Bank Account Details** fields.
18. Upload bank details **Supporting Documentation** (* Required). Documentation must be in pdf file type.

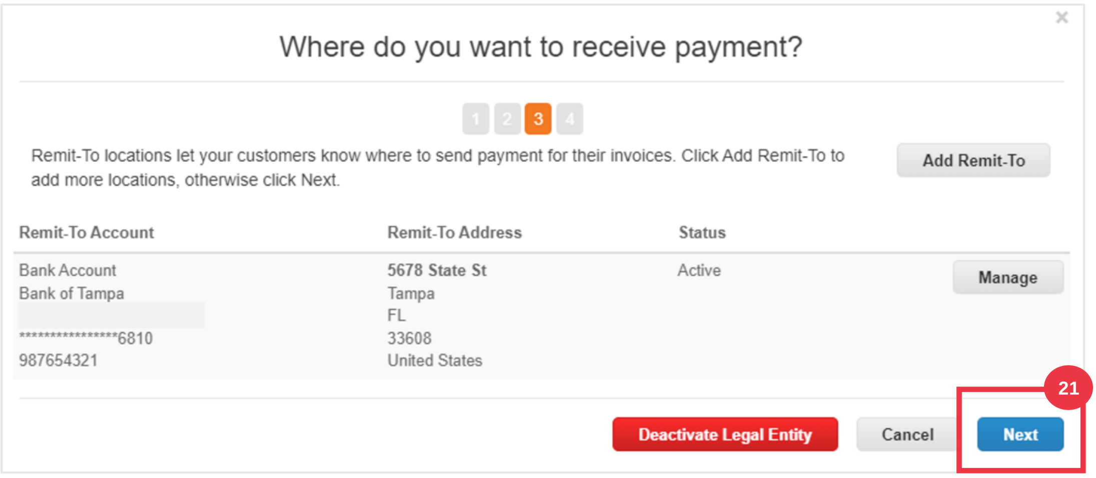


19. Enter the **Bank Address** information.
20. Click the **Save & Continue** button.



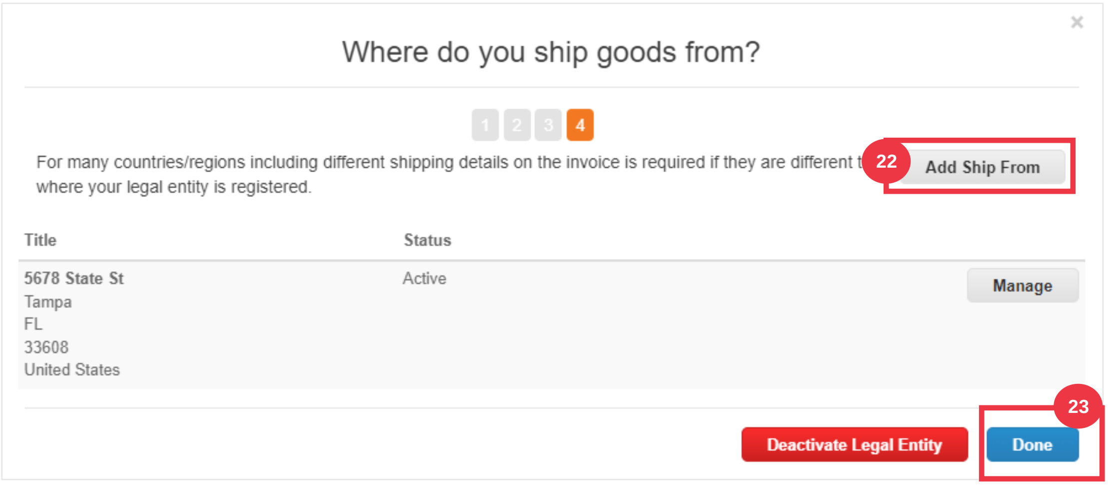
The **Where do you want to receive payment?** screen appears with a summary of information you have provided.

21. Click the **Next** button.

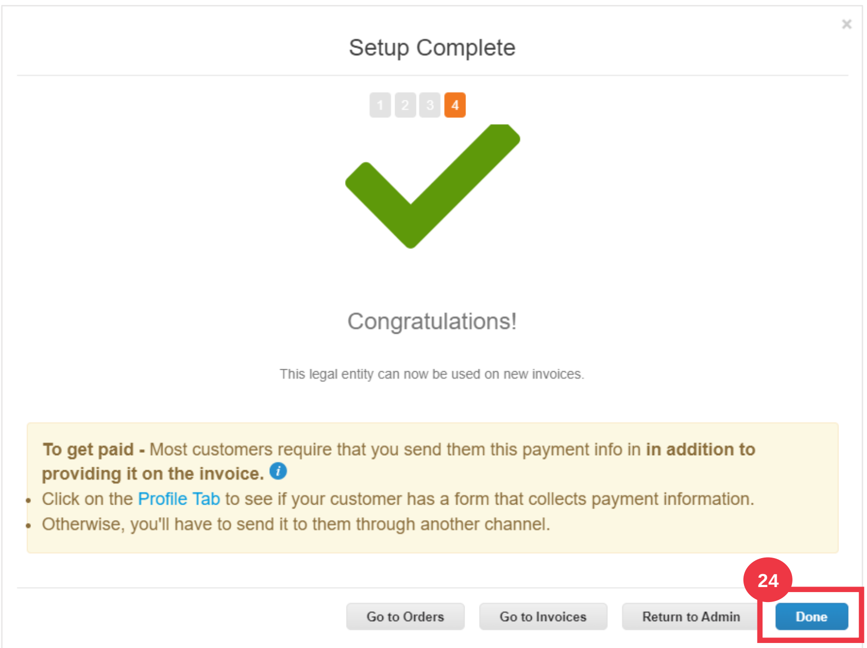


The **Where do you ship good from?** screen appears with a summary of information you have provided.

22. Click the **Add Ship From** button if you shipping detail are different from where your legal entity is registered.
23. Click the **Done** button.



24. Click the **Done** button.

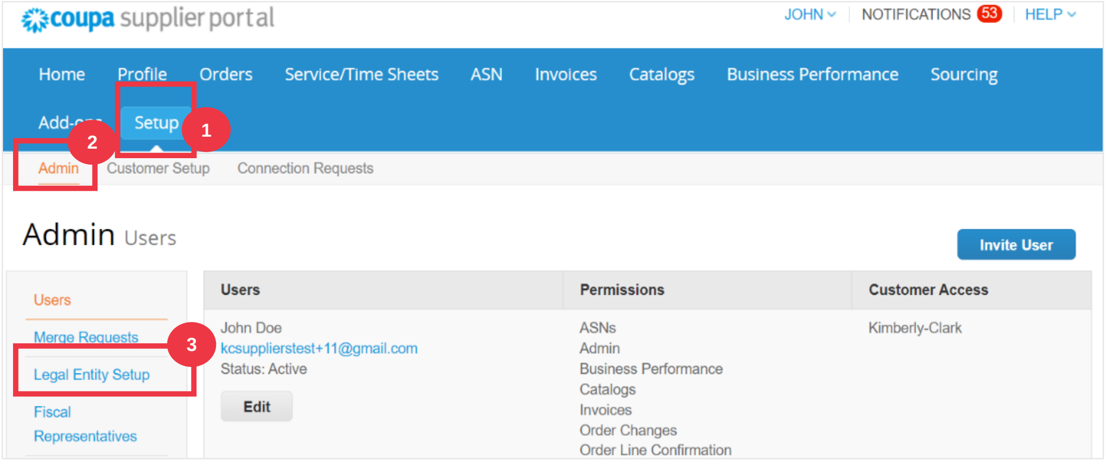


[Return to Table of Contents]

How to Manage Legal Entity in the CSP

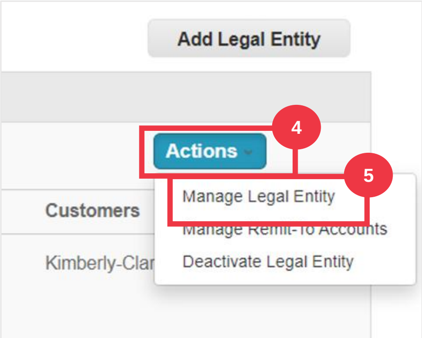
In order to electronically invoice (either through CSP or via your actionable e-mail address provided during registration), your entity must be set-up as an established legal entity within CSP.

1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** subtab.
3. Select **Legal Entity Setup.**



Note: The data you entered during registration will autofill these fields: Invoice From, Remit-To Accounts, Locations, Tax IDs, and Customers.

4. In the left corner, click the **Actions** button to manage the details of an existing Legal Entity.
5. Select **Manage Legal Entity** from the drop-down list.
    a. Any updates needed to Manage Remit-to Accounts or to Deactivate Legal Entity can also be accessed from the **Actions** button.



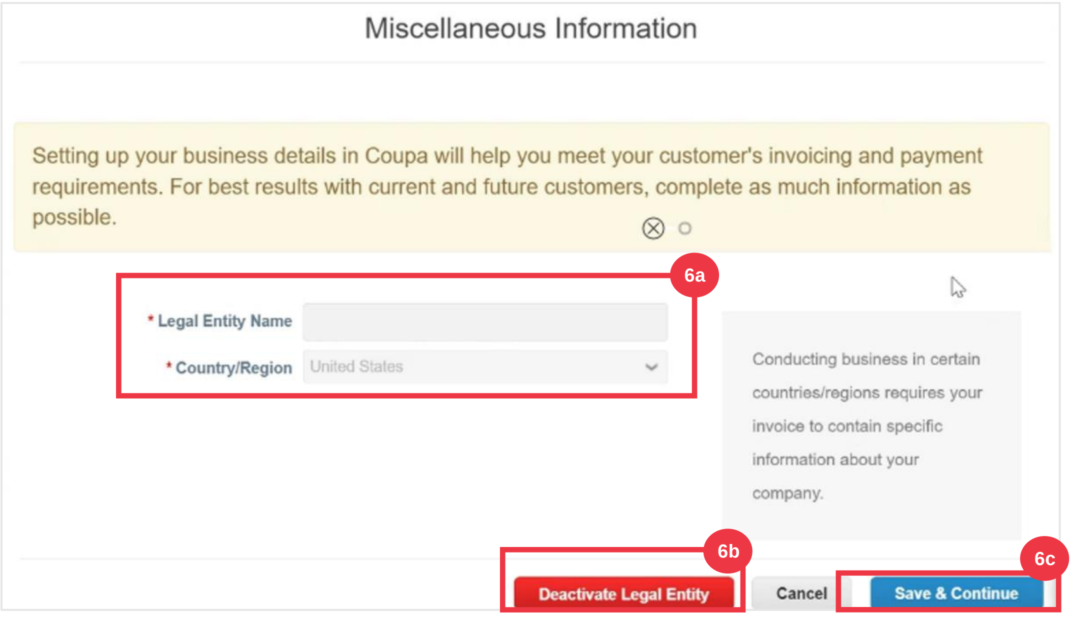
From here, you can edit the details that you originally entered. For details per each field, please see the How to Setup Your Company as a Legal Entity section in this document. Additionally, please see considerations below:

6. You can edit **Miscellaneous Information**.

a. You <u>cannot change</u> the **Name** or **Country/Region** associated to your legal entity in this process. If you need to amend these fields, you will need to deactivate the entity and set it up again.

b. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.

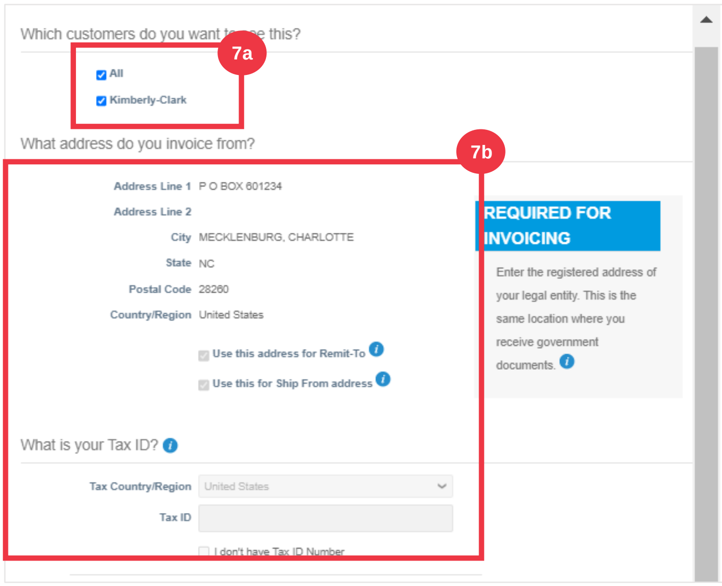
c. Click **Save & Continue**.



7. Edit your **customer** information.

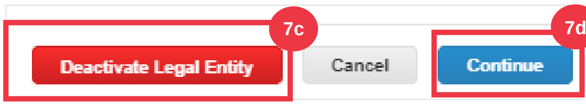
a. If applicable, edit your selection in the **Which Customers do you want to see this** checkbox.

b. You <u>cannot change</u> the **Address** or **Tax ID information** associated to your legal entity in this process. If you need to amend these fields, you will need to deactivate the entity and set it up again.



c. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.

d. Click the **Continue** button.



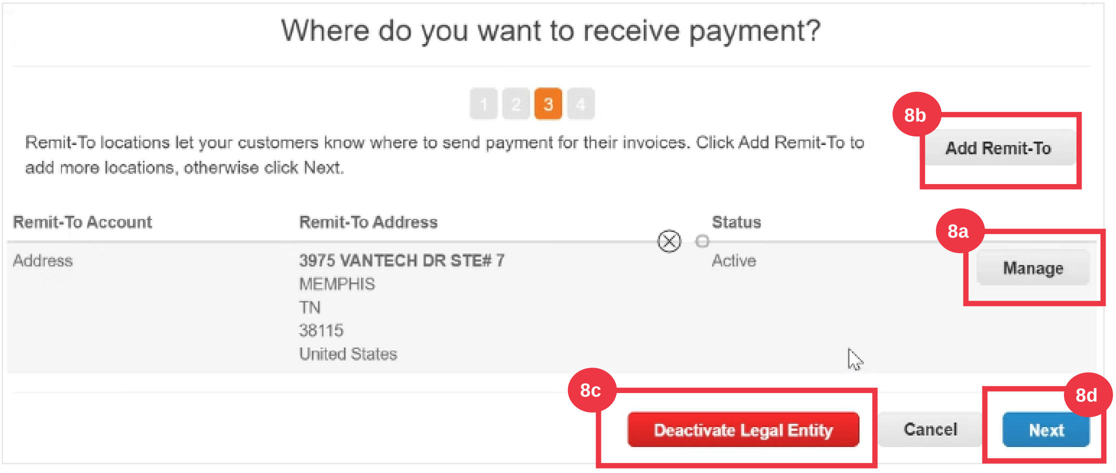
8. You can edit **Where you want to receive payment.**

a. Click the **Manage** button to edit your existing remit-to address.

b. Click **Add Remit-To** to add more locations.

c. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.

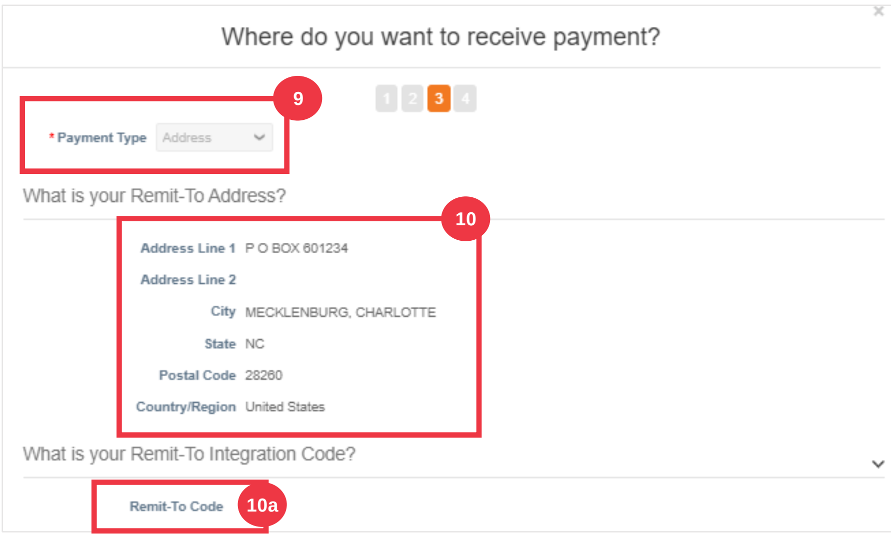
d. Click the **Next** button.



9. Your **Payment Type** will <u>not</u> be editable. K-C only sends payment via electronic form. No payment will be sent in hard copy form.

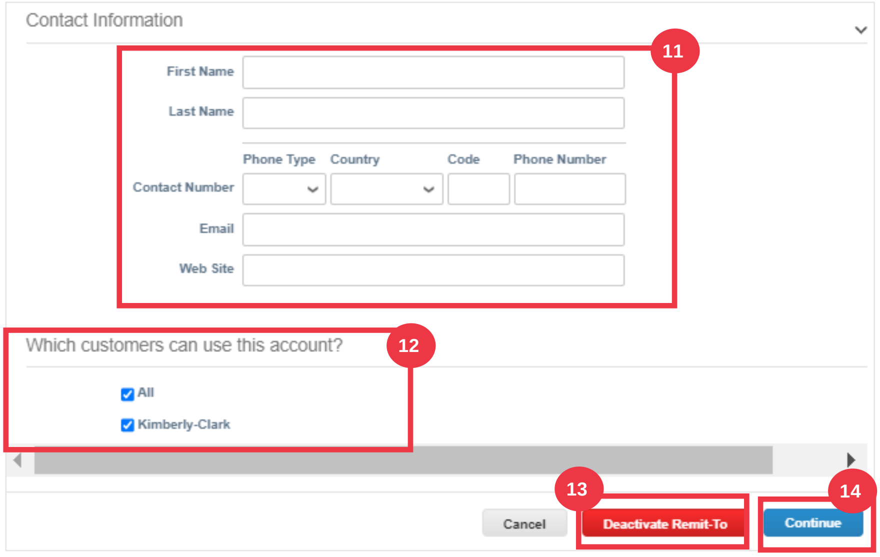
10. Your main **Remit-To Address** will display. You can only maintain <u>**ONE**</u> **Remit -To address** connected to your **Payment Type**. Although, you can set up multiple Remit To addresses, K-C will only send payment to <u>**ONE**</u> designated **Remit-To address**.

    a. Select the field to edit or add an existing **Remit-To Integration Code**.

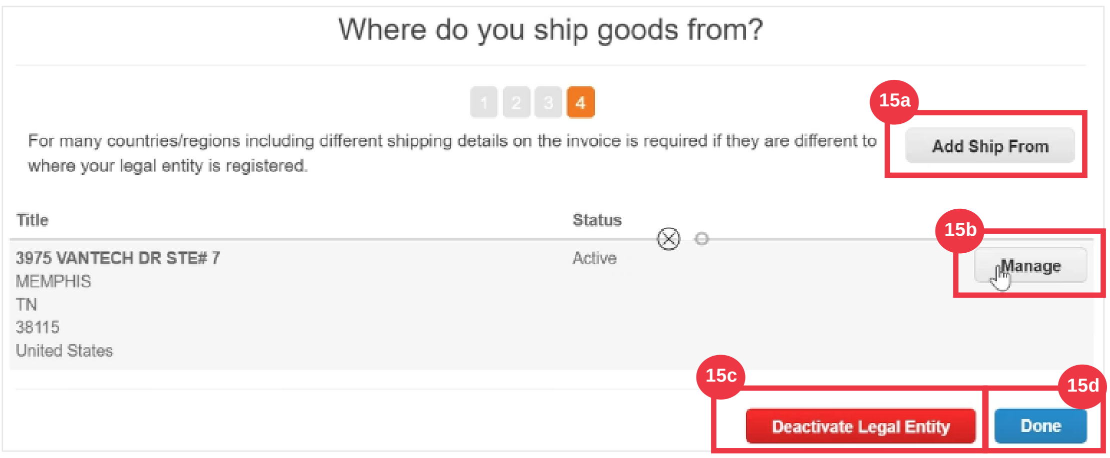


11. You can add or edit existing **Contact Information.**

12. You can update **Which customers can use this account?**
13. You can also **Deactivate** a particular Remit-To address.
14. Click the **Continue** button.



15. You can edit **Where you ship goods from**.
    a. Click the **Add Ship From** to update your ship from address information.
    b. Click the **Manage** button to edit your existing ship from address information.
    c. If you wanted to, you could still **Deactivate the Legal Entity.**
    d. Click the **Done** button.



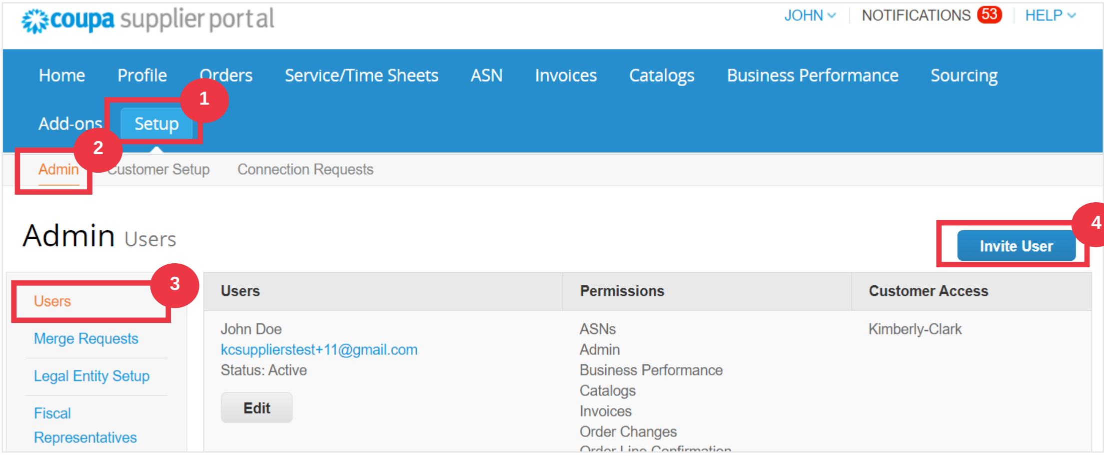
[Return to Table of Contents](#)

How to Invite Users to the CSP

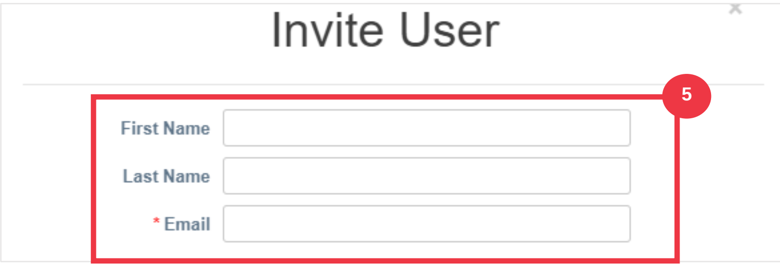
1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** tab.
3. Select **Users**.

a. You can review all users who are associated to your account on the **Users** screen.

4. Click the **Invite User** button.



5. The **Invite User** screen appears. Enter the invitee's contact information.



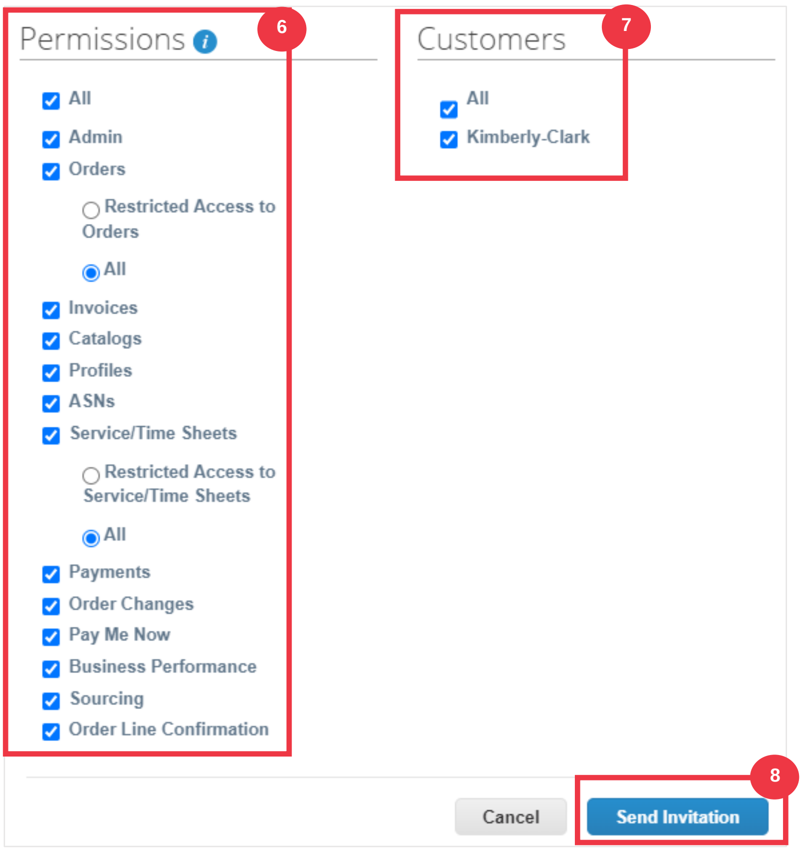
6. Define the **Permissions** (levels of access) for the invitee by selecting the following check boxes:
   - **All** (gives full access to all your CSP functions, except for user administration)
   - **Admin** (gives full access to all your CSP functions)
   - **Orders** (allows viewing and managing of Purchase Orders)
   - **Orders - Restricted Access** (allows accessing specific Purchase Orders)
   - **Orders - All** (allows viewing and managing of all Purchase Orders)
   - **Invoices** (allows creating and sending of invoices to customers)
   - **Catalogs** (allows creating and managing customer-specific electronic catalogs)
   - **Profiles** (allows modifying of customer-specific profiles).

Note: When **a supplier** is inviting another user from their organization to CSP, **the Profiles checkbox MUST be selected**. This allows the invited user to make edits and manage their company profile.

   - **ASN** (allows creating and sending advanced ship notices (ASN) to customers
   - **Service/Time Sheets** (allows creating and submitting service/time sheets against Purchase Orders)

- **Service/Time Sheets - Restricted Access to Service/Time Sheets** (allows accessing specific service/time sheets)
- **Service/Time Sheets – All** (allows creating and submitting any service/time sheets against Purchase Orders)
- **Payments** (allows viewing payments and downloading digital checks)
- **Order Changes** (allows submitting PO change requests)
- **Pay Me Now** (Available only if your customers use Coupa Pay and enabled the feature related to this permission)
- **Business Performance** (allows viewing business performance information, e.g., order, invoice and delivery trends)
- **Sourcing** (allows viewing public sourcing events)
- **Order Line Confirmation** (allows viewing of Purchase Order lines within ASN)

7. Define which **Customers are visible** to the invitee by selecting the following check boxes:
    a. **All** (allows viewing of all customers within your CSP)
    b. **Kimberly-Clark** (allows viewing of only K-C within your CSP)
8. Click the **Send Invitation** button.



Once a new user has accepted the invitation, they will appear within the **Users** table (Step 3). New users can be delegated tasks within the CSP such as completing the **Supplier External Form** and or any **due diligence questionnaire (DDQ)**.

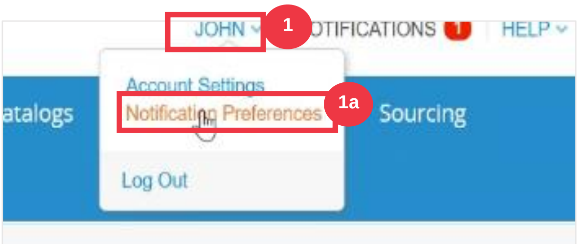
Return to Table of Contents

Please continue to next page.

How to Manage Notification Preferences in the CSP

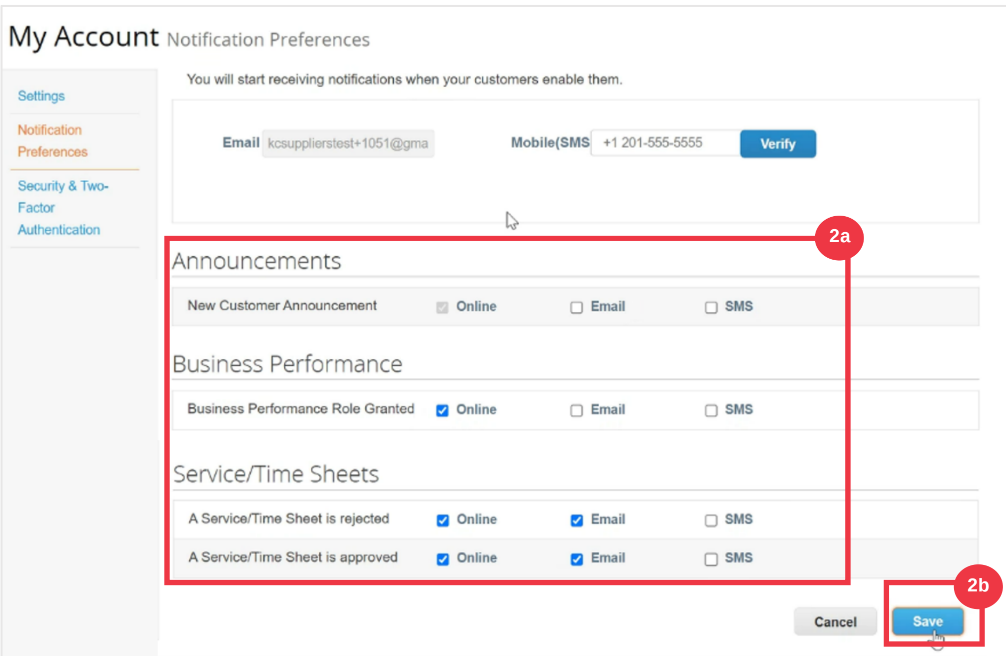
Through Coupa Supplier Portal (CSP), you can receive notifications for a variety of preferences, including (but not limited to) canceled digital checks, virtual cards and created receipts.

1. From your **CSP Home** screen, hover over **Your Name.**
   a. Select **Notification Preferences**.



2. Manage your **nonfiction preferences**.
   a. Select **how** you would like to be notified (e.g., **online**, **email** or **SMS**) by **selecting the check boxes** from the corresponding notification areas (e.g., announcements, business performance, service/time sheets).
   b. Click **Save**.

Note: There are <u>three types of notifications</u>: **Announcements** (information communicated from your customers), **Business Performance** (summary of your orders and invoices, year-to-date order and invoice trends and lead time to shipping goods), and **Service/Time Sheets** (list of service/time sheets and related Purchase Order lines).

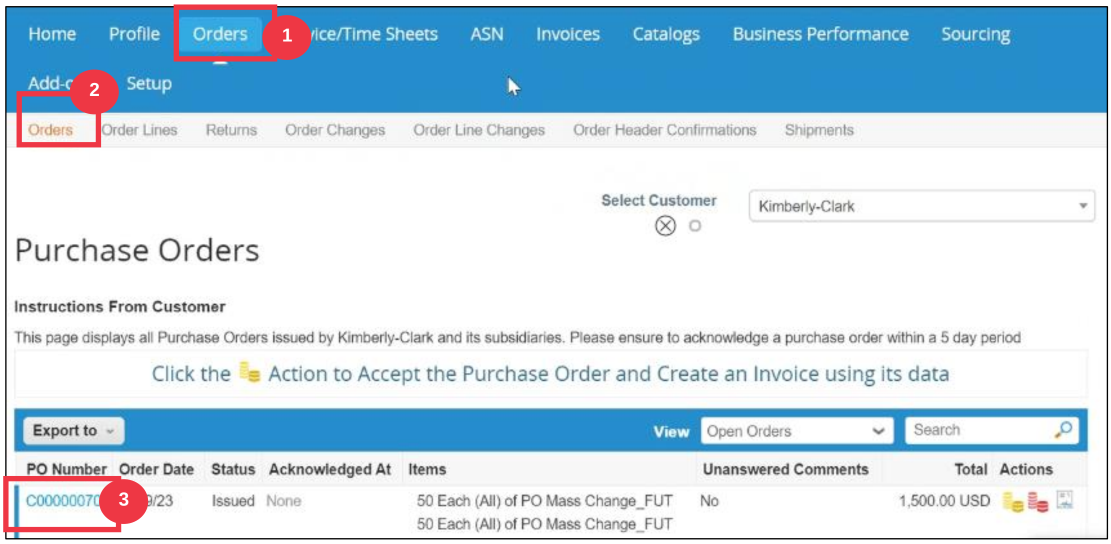


[Return to Table of Contents]

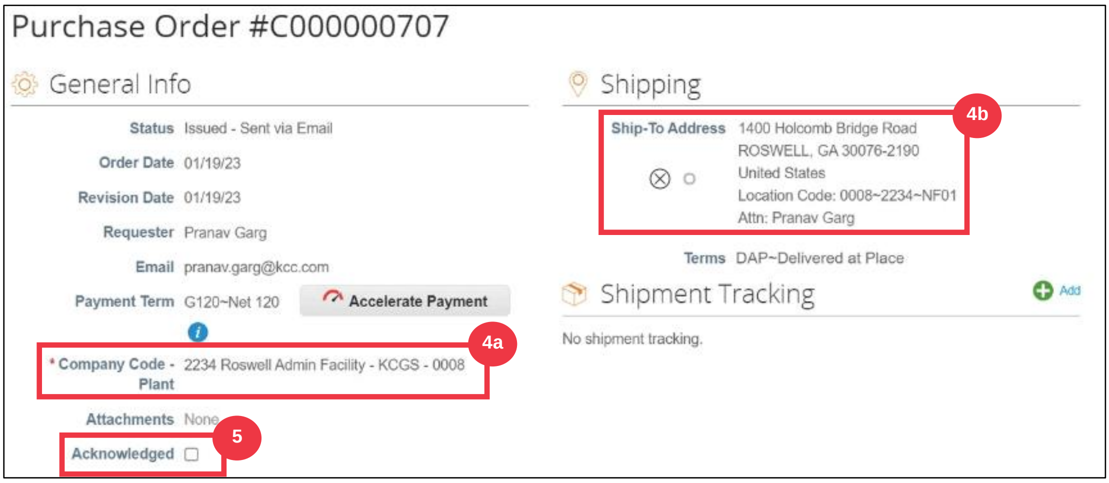
How to Submit Vendor Acknowledgment of Purchase Orders in the CSP

Vendor Acknowledgement within Coupa allows you to select a single checkbox to indicate that you have properly received a K-C PO.

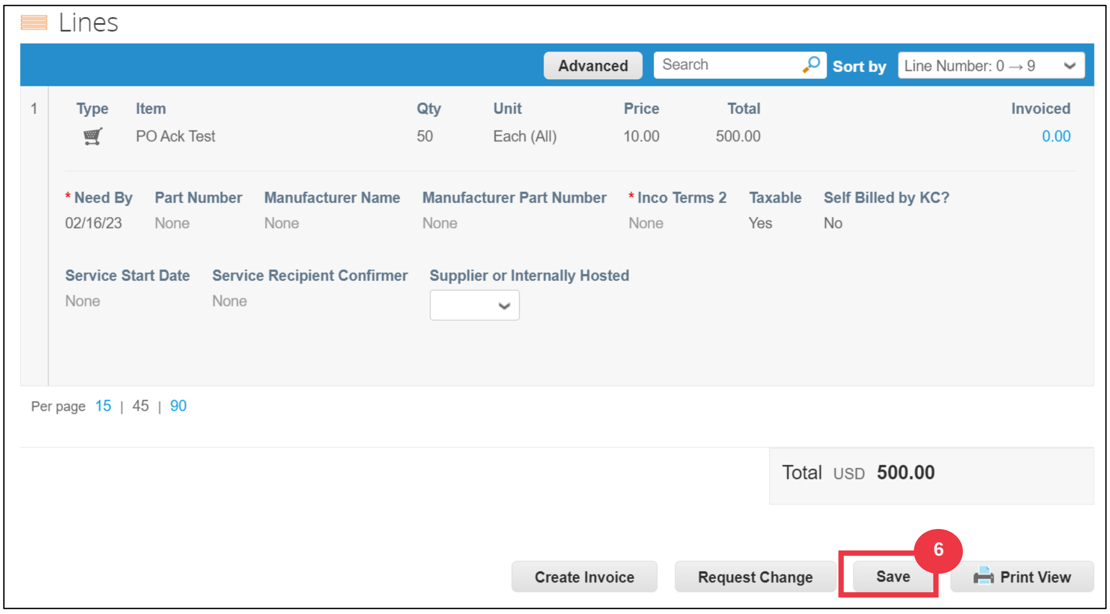
1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Click the **PO Number** hyperlink to open a PO.



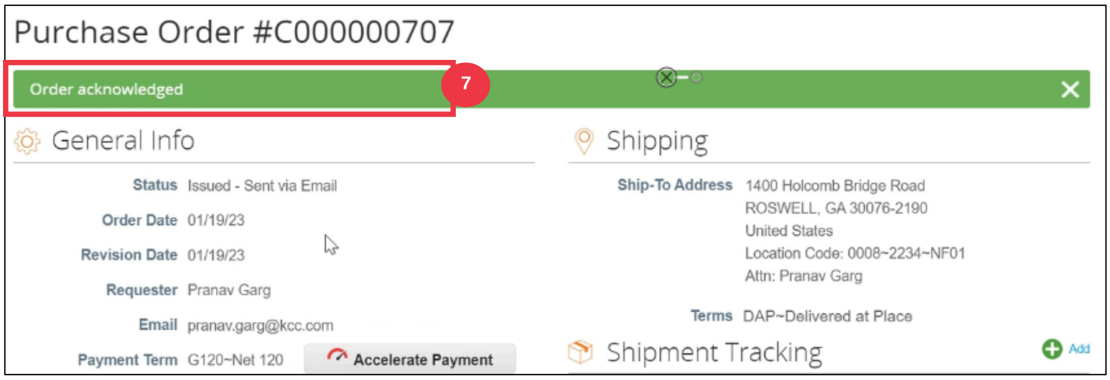
4. Review the following information on the PO:
   a. **Company Code Plant**
   b. **Ship-To Address**
5. Select the **Acknowledged** checkbox to acknowledge receiving the PO.



6. Scroll to the end of the **Lines** section and click the **Save** button.



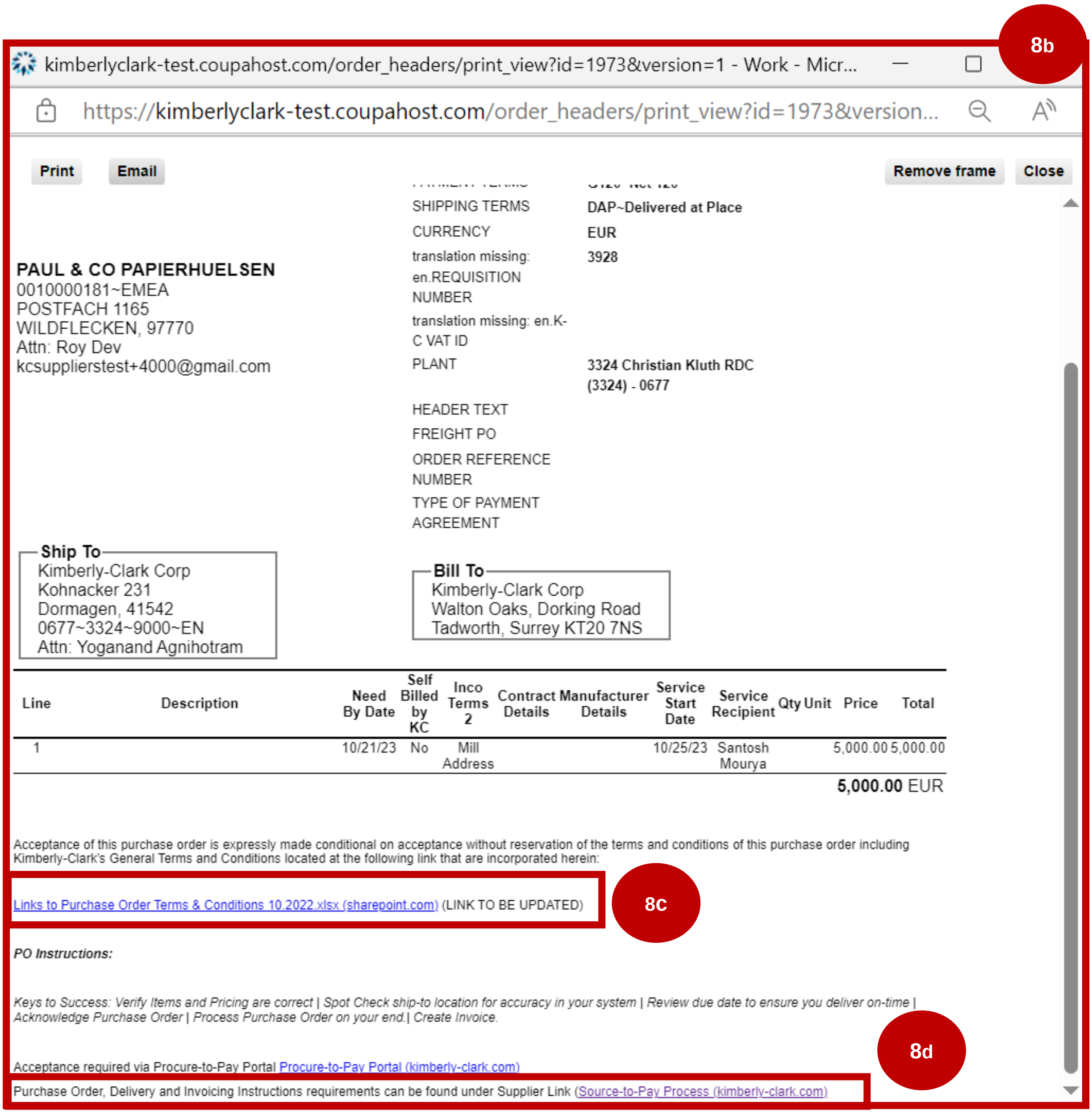
7. You will receive an **Order acknowledged** notification.



The K-C Terms & Conditions as well as relevant PO Delivery and Invoicing instructions can be seen on the PO Output Form.

8. To see the details, follow below instructions:
    a. Click on **“Print View”** button.
    b. Printable version of the PO will be displayed.
    c. At the bottom of the form, you will see several links. To view **Terms & Conditions** click on the link above.
    d. To view **PO delivery and invoicing instructions** click on the link at the bottom of the form.

To view Coupa Training Materials as well as any Kimberly-Clark’s Source to Pay relevant information go to Supplier Link: Source to Pay Process.



kimberlyclark-test.coupahost.com/order_headers/print_view?id=1973&version=1 - Work - Micr...

https://kimberlyclark-test.coupahost.com/order_headers/print_view?id=1973&version...

Print Email Remove frame Close

SHIPPING TERMS	DAP~Delivered at Place
CURRENCY	EUR
translation missing: en.REQUISITION NUMBER	3928
translation missing: en.K-C VAT ID	
PLANT	3324 Christian Kluth RDC (3324) - 0677
HEADER TEXT	
FREIGHT PO	
ORDER REFERENCE NUMBER	
TYPE OF PAYMENT AGREEMENT	

PAUL & CO PAPIERHUELSEN
0010000181~EMEA
POSTFACH 1165
WILDFLECKEN, 97770
Attn: Roy Dev
kcsupplierstest+4000@gmail.com

Ship To
Kimberly-Clark Corp
Kohnacker 231
Dormagen, 41542
0677~3324~9000~EN
Attn: Yoganand Agnihotram

Bill To
Kimberly-Clark Corp
Walton Oaks, Dorking Road
Tadworth, Surrey KT20 7NS

Line	Description	Need By Date	Self Billed by KC	Inco Terms 2	Contract Details	Manufacturer Details	Service Start Date	Service Recipient	Qty	Unit	Price	Total
1		10/21/23	No	Mill Address			10/25/23	Santosh Mourya			5,000.00	5,000.00

5,000.00 EUR

Acceptance of this purchase order is expressly made conditional on acceptance without reservation of the terms and conditions of this purchase order including Kimberly-Clark's General Terms and Conditions located at the following link that are incorporated herein:

Links to Purchase Order Terms & Conditions 10.2022.xlsx (sharepoint.com) (LINK TO BE UPDATED)

8c

PO Instructions:

Keys to Success: Verify Items and Pricing are correct | Spot Check ship-to location for accuracy in your system | Review due date to ensure you deliver on-time | Acknowledge Purchase Order | Process Purchase Order on your end.| Create Invoice.

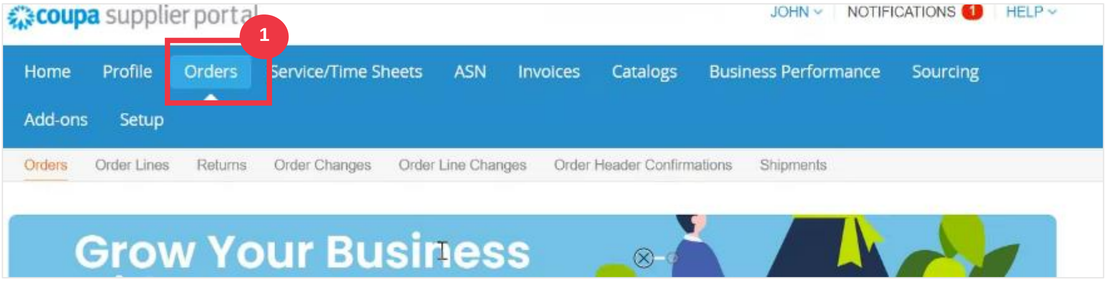
Acceptance required via Procure-to-Pay Portal Procure-to-Pay Portal (kimberly-clark.com)

Purchase Order, Delivery and Invoicing Instructions requirements can be found under Supplier Link (Source-to-Pay Process (kimberly-clark.com))

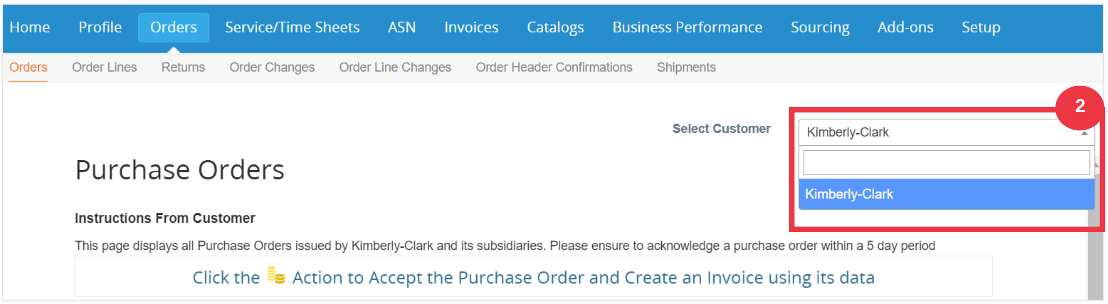
[Return to Table of Contents](#)

How to View and Search Purchase Orders in the CSP

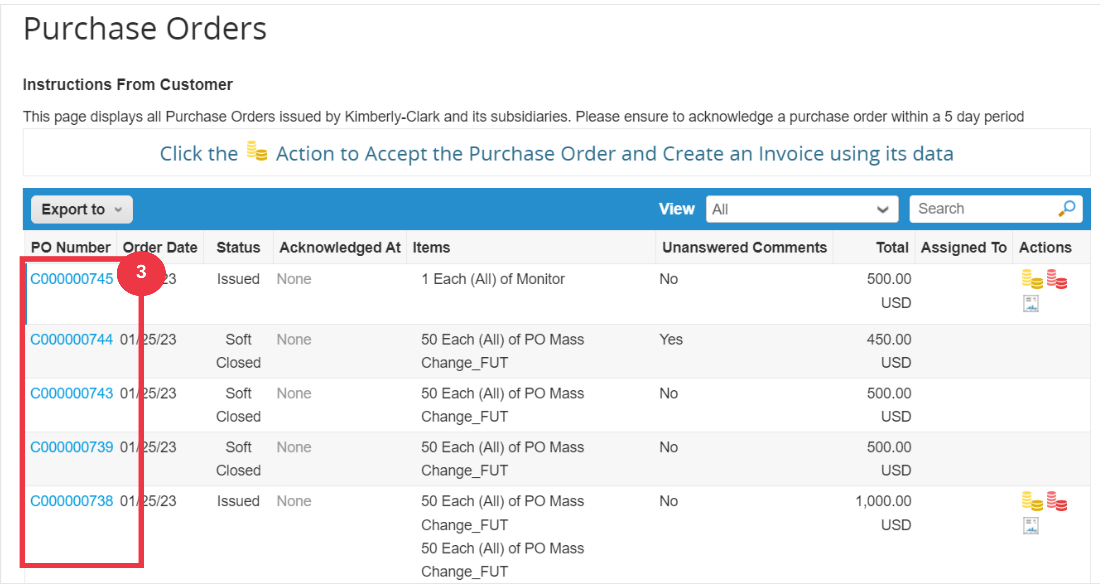
1. From your **CSP Home** screen, select the **Orders** tab.



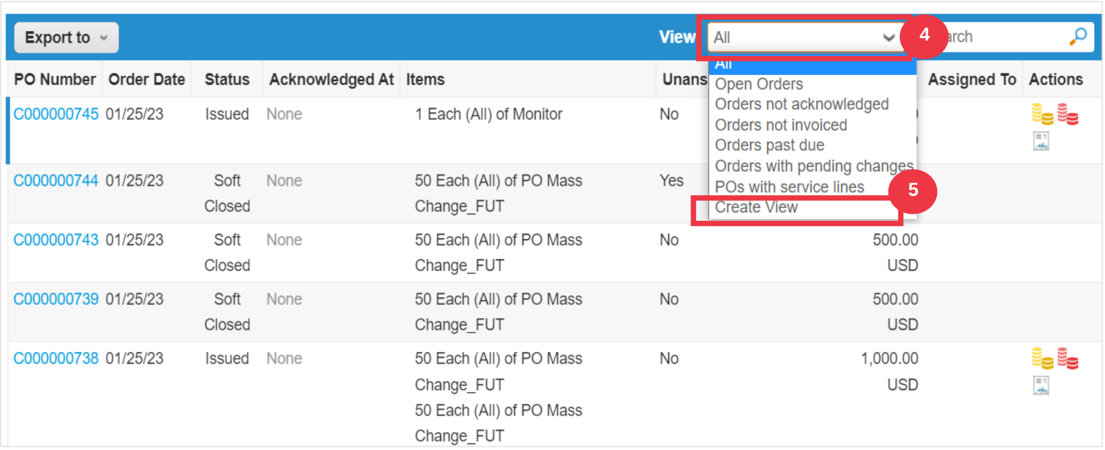
2. Select **Kimberly-Clark** from the **Select Customer** drop-down list.



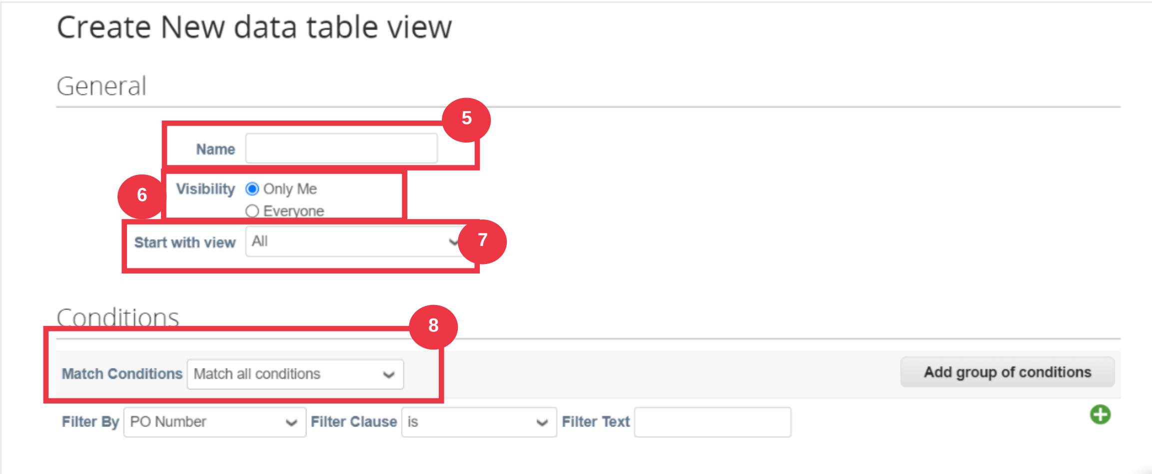
3. In the **Purchase Orders** table, search for a PO using the **PO Number** column and clicking the desired PO number.



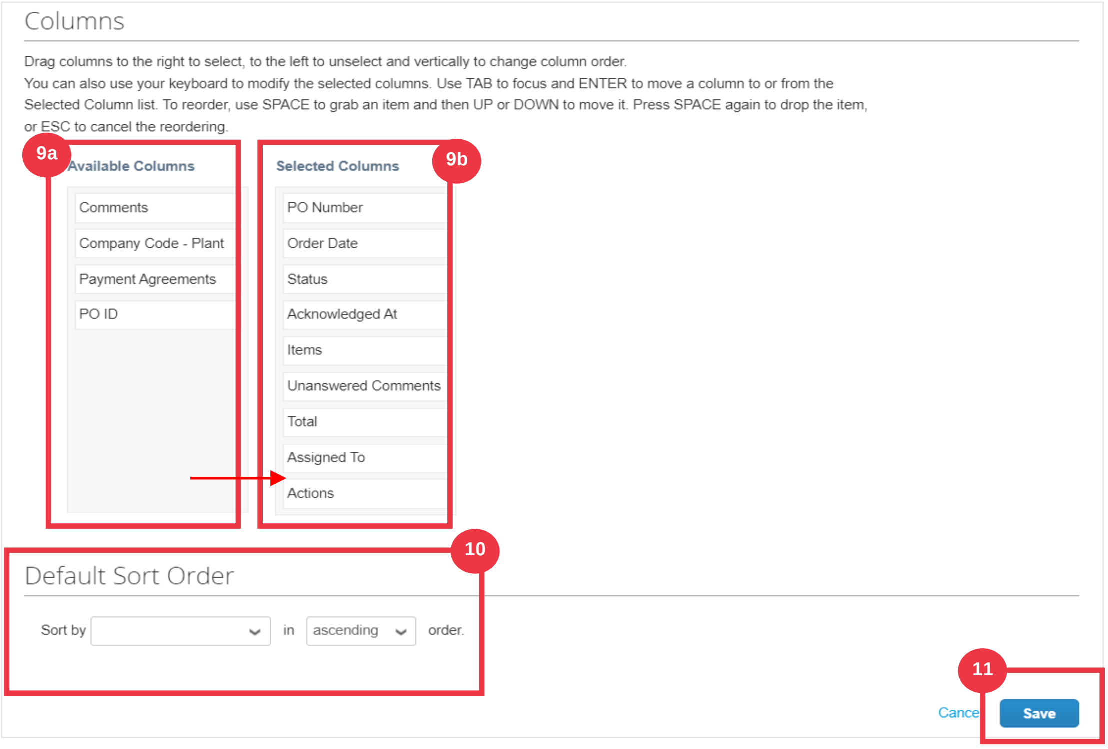
4. Click the **View** drop-down list to filter your search for Purchase Orders from the standard set of views available.
5. Select **Create View** to personalize your column display fields.



5. Enter a **Name** for your view.
6. Select the **Visibility** for your view. Choose from the following:
   a. **Only me** (view is visible by only you)
   b. **Everyone** (view is visible by all other users)
7. Select your **Start with view** field (use this option to load the settings from another view, and then modify those settings to fit your needs for this view).
   a. Available options include: **All, Open Orders, Orders Not Acknowledged, Orders Not Invoiced, Orders Past Due, Orders with Pending Changes, POs Pending Rework,** and **POs with Service Lines**.
8. Click the **Match Conditions** drop-down list to apply conditions to your view based on data available in the CSP.



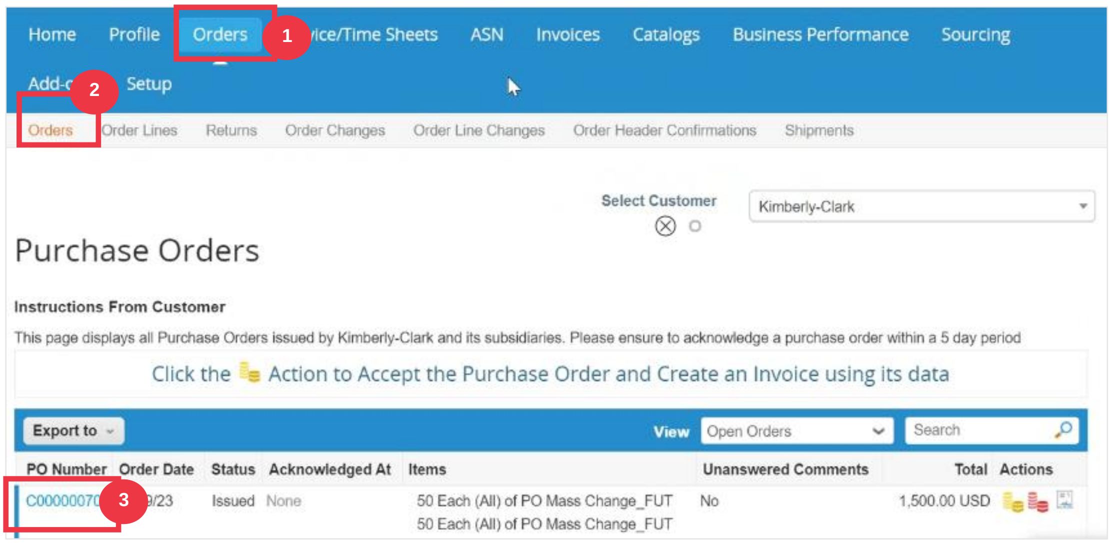
9. Click-and-drag the data points from (9a) **Available Columns** field for to (9b) **Selected Columns** to display.
10. Define the **Default Sort Order** (use this option to sort the result sets from your view in ascending or descending order).
11. Click the **Save** button.



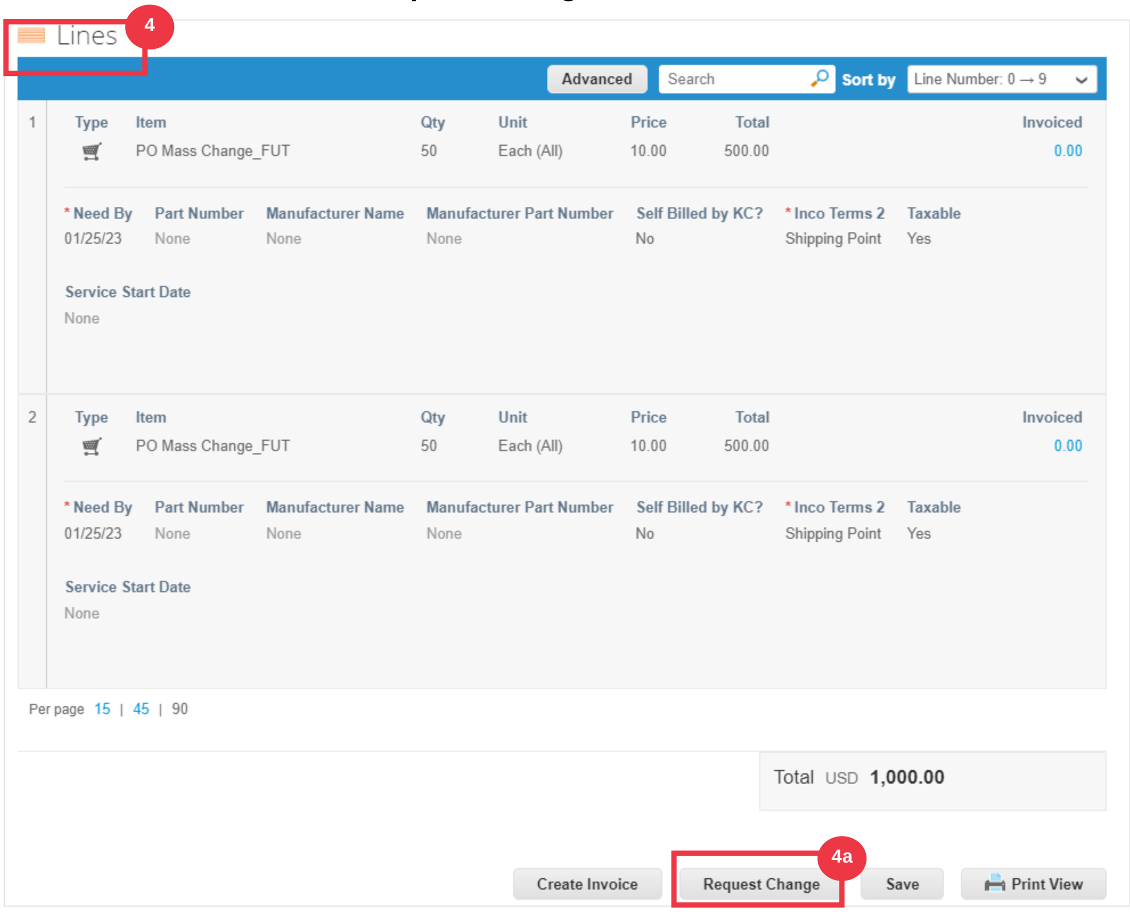
[Return to Table of Contents](#)

How to Request a PO Change or PO Cancellation

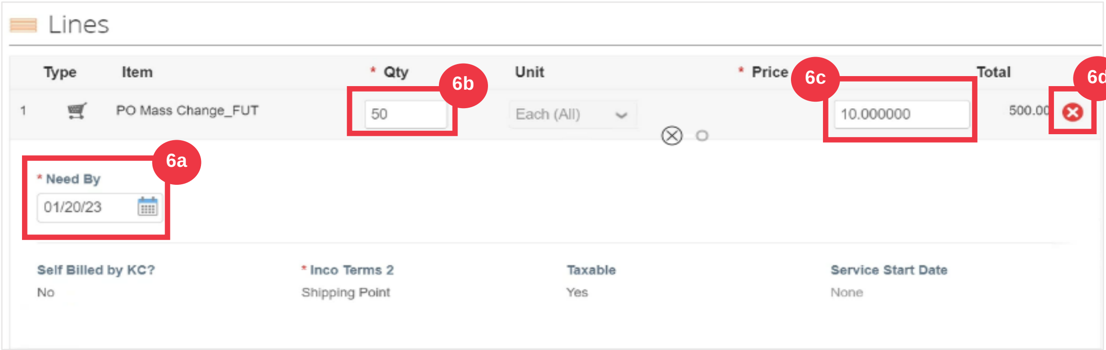
1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Click the **PO Number** hyperlink to open a PO.



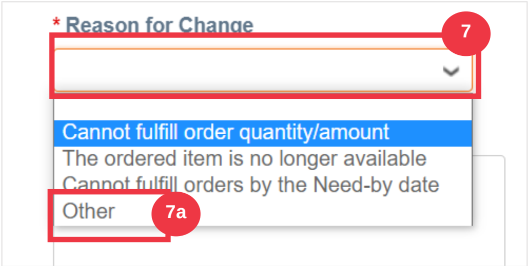
4. The **Purchase Order** will open with all details. Scroll to the **Lines** section of the PO.
   a. Click the **Request Change** button.



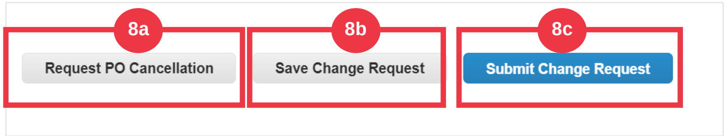
5. The **PO Lines section** becomes editable.
6. In the **PO Lines section**, make the desired edits to either of the following fields:
    a. **Need By**
    b. **Quantity**
    c. **Price**
    d. **Line Delete** (click the red X to delete the entire line)



7. Select a reason for change from the **Reason for Change** drop-down list.
    a. Select **Other** to activate and type a reason.

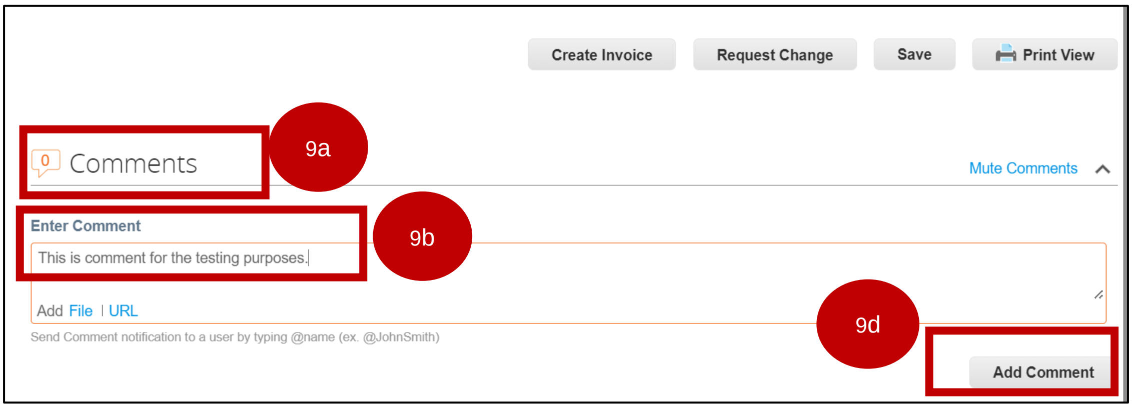


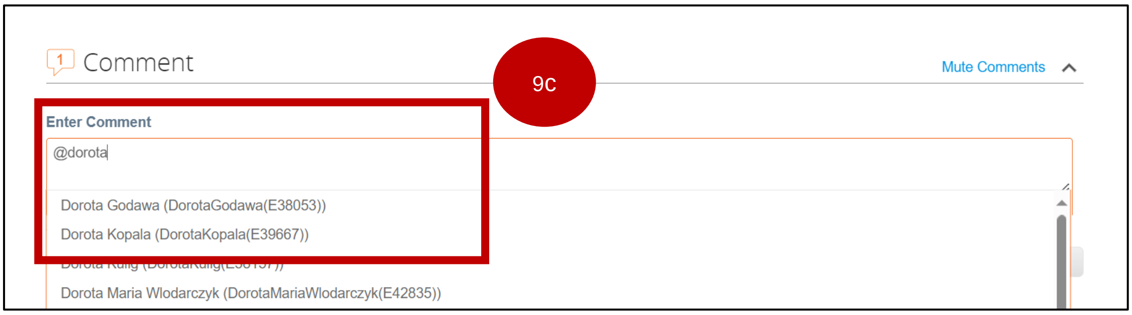
8. Choose one of the following:
    a. Click the **Submit Change Request** to submit.
    b. Click the **Save Change Request** button to save changes but not submit the request.
    c. Click **Request PO Cancellation** to cancel the entire PO.

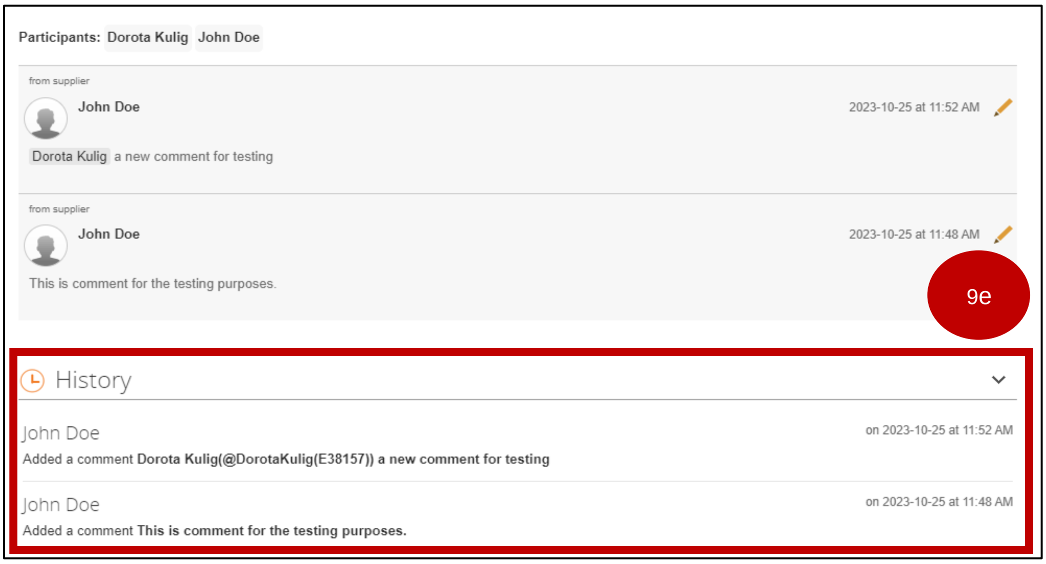


Also, there is a field **"Comments"** which can be freely written. At the bottom of the page, changes or comments to the order can be viewed at any time under **"History".**

9. To leave a note for the customer:
    a. Scroll down to the **Comments** section.
    b. Type in a note, you would like to leave for the customer to see.
    c. You can **@mention** specific users in the comments section of Coupa documents so they'll get a notification when they've been mentioned in a comment.
    d. Click on **"Add Comment"** button to save the note.
    e. You can view comments added at any time in the **"History"** section.







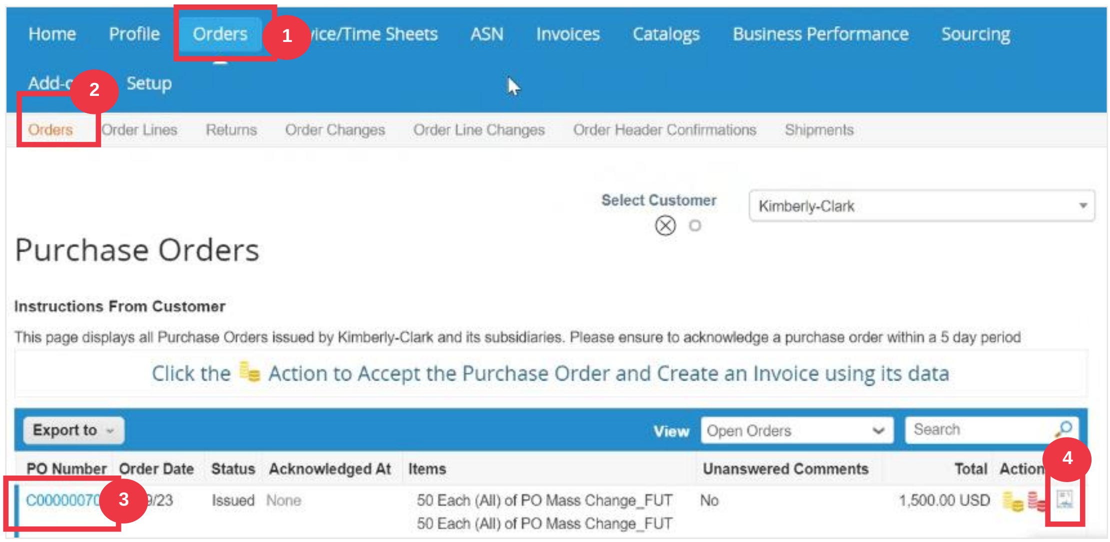
Note: K-C will review the change request or cancellation request and send notification of acceptance or denial. You will receive an updated PO from K-C and you will still have the ability to submit other invoices.

[Return to Table of Contents]

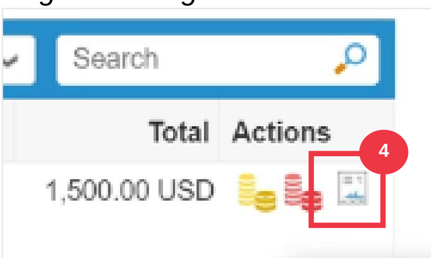
How to Create an Advance Shipping Notice (ASN) in the CSP

Coupa Supplier Portatl allows you to send **advance notice to your customers about when you ship items** (**ASNs**). ASNs are not an expected requirement for transacting within Coupa with Kimberly-Clark.

1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Identify the Purchase Order for which you would like to create an ASN.
4. Select the **Flip to ASN** icon.



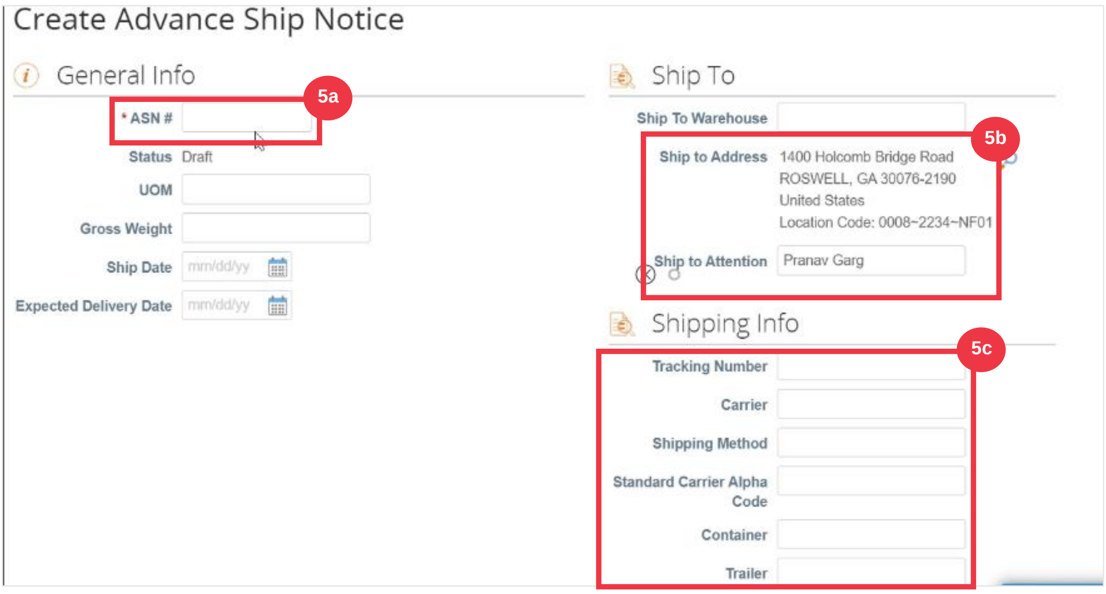
Magnified image:



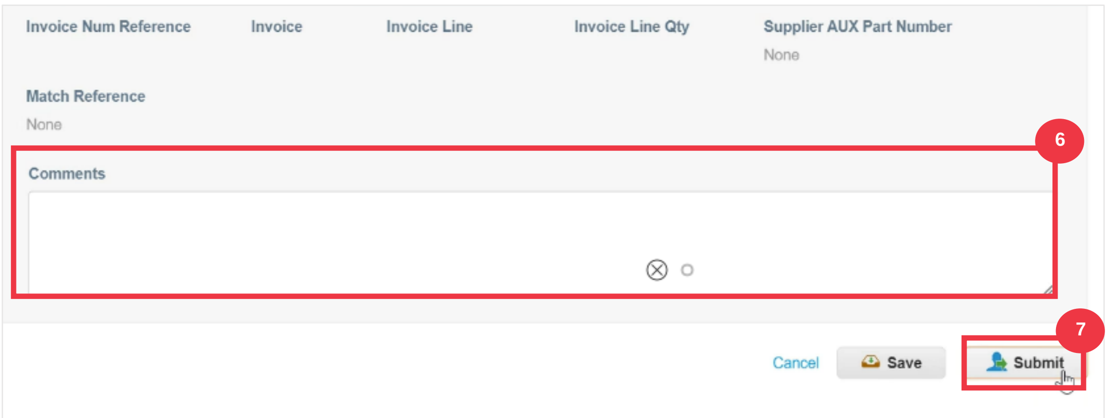
Please continue to the next page.

5. Enter the details for the ASN in the following sections:
    a. **ASN #**
    b. **Ship To** (this address will autofill from the PO)
    c. **Shipping Info**

Note: You will need to provide K-C with your ASN numbers for related shipments or those ASNs that are provided to you from third-party logistics (3PL) companies.



6. Enter any **Comments** to K-C (if applicable).
7. Click the **Submit** button.

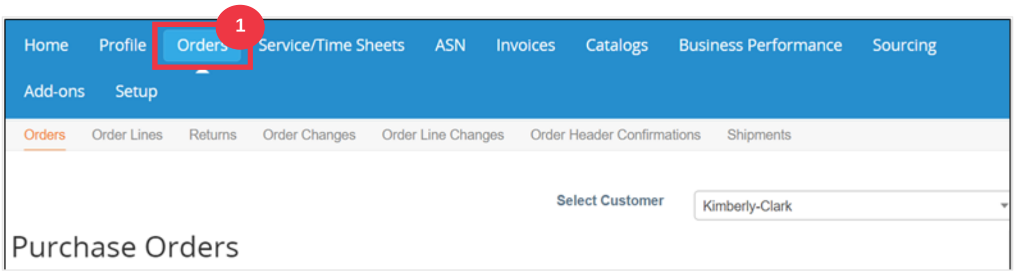


[Return to Table of Contents](#)

How to Create Invoices in the CSP (Flipping a PO)

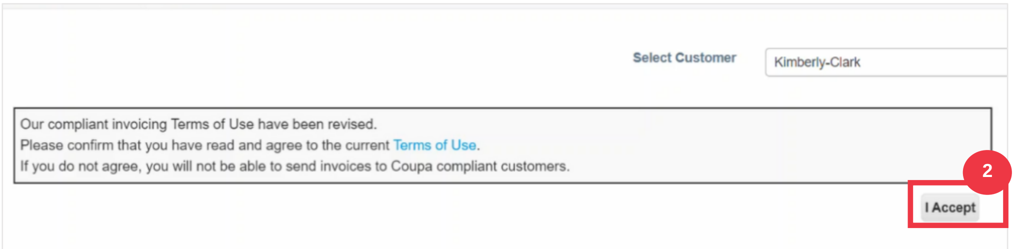
The CSP allows you to quickly transfer a PO into an invoice (i.e., flip a PO) and send to your customers.

1. From your **CSP Home** screen, select the **Orders** tab.

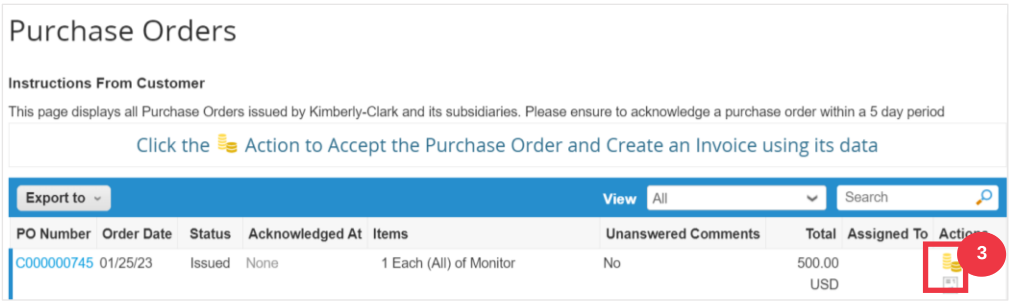


Note: If this is your **first-time invoicing Kimberly-Clark**, you will need to accept the Coupa Supplier Portal's updated Invoicing Terms of Use before continuing.

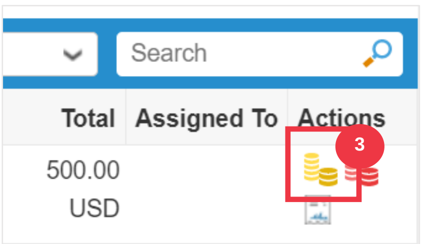
2. Click the **I Accept** button (if applicable).



3. In the **Actions** column of the PO you want to create an invoice for, click the **Gold Coins** icon.



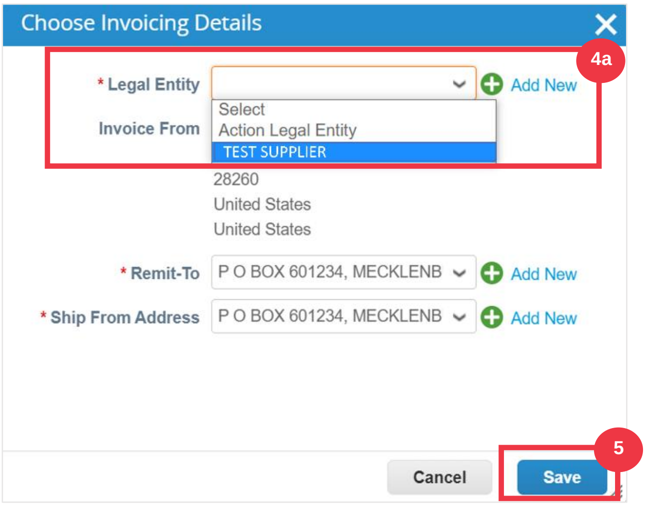
Magnified image:



4. Define the **Invoicing Details**.
    a. Select the **Legal Entity** drop-down lists and choose your legal entity.

b. The information for the **Invoice From, Remit-To and Ship From Address** fields will autofill with the address details that are associated to your legal entity after it is selected.

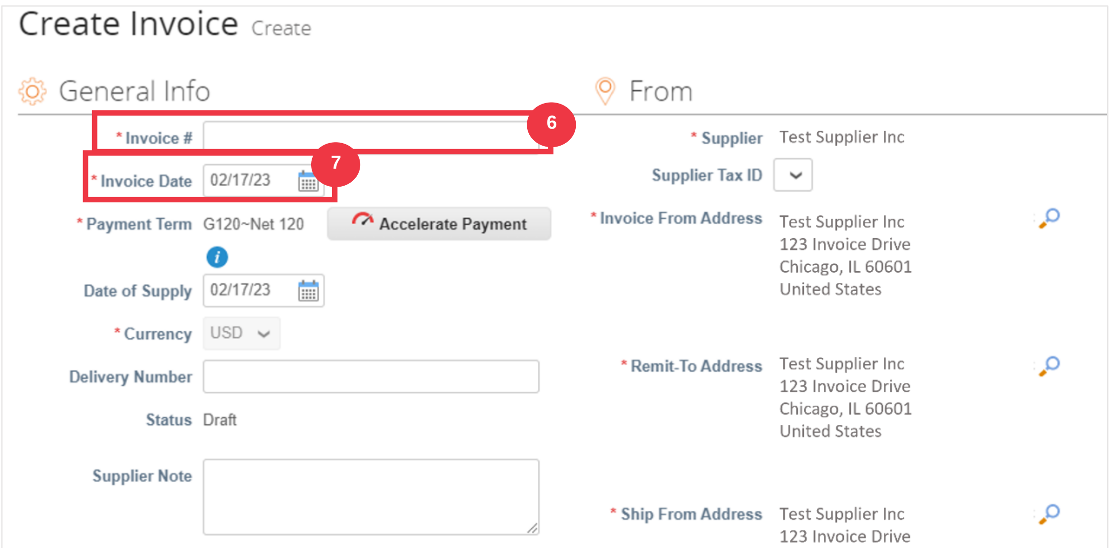
5. Click the **Save** button.



6. Enter the invoice number in the **Invoice #** field.

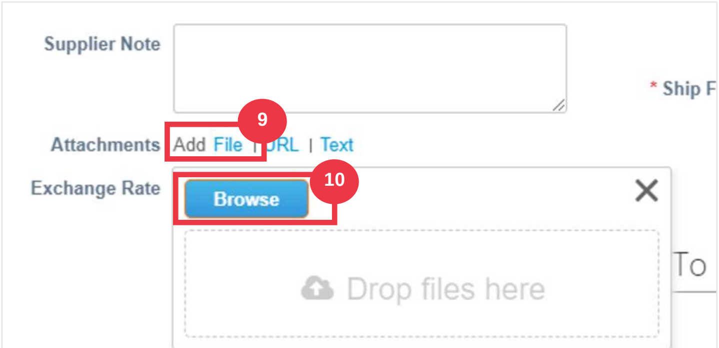
7. Select an **Invoice Date**. The **Invoice Date** must be within 7 calendar days of the current date.

8. The following fields autofill from the PO: **Payment Terms, Currency, Supplier**, **Invoice From Address**, **Remit-To Address**, **Ship From Address.**

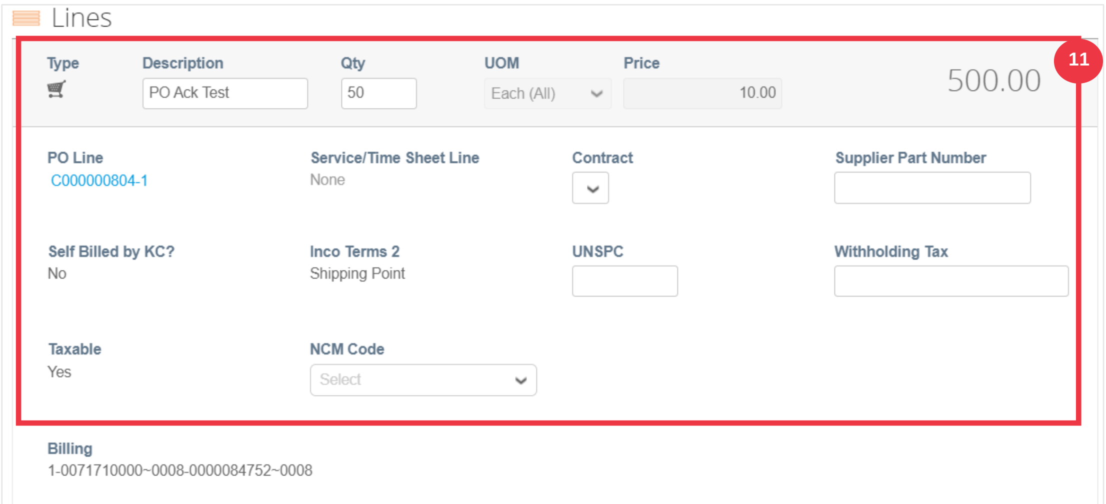


9. Click **Add File**.
10. Click the **Browse** button to attach an original copy of the invoice.

Note: If the file size is more than 20MB, the **invoice will be disputed.** Once invoice is disputed due to attachment size, discard disputed invoice and resubmit invoice with resized attachment.

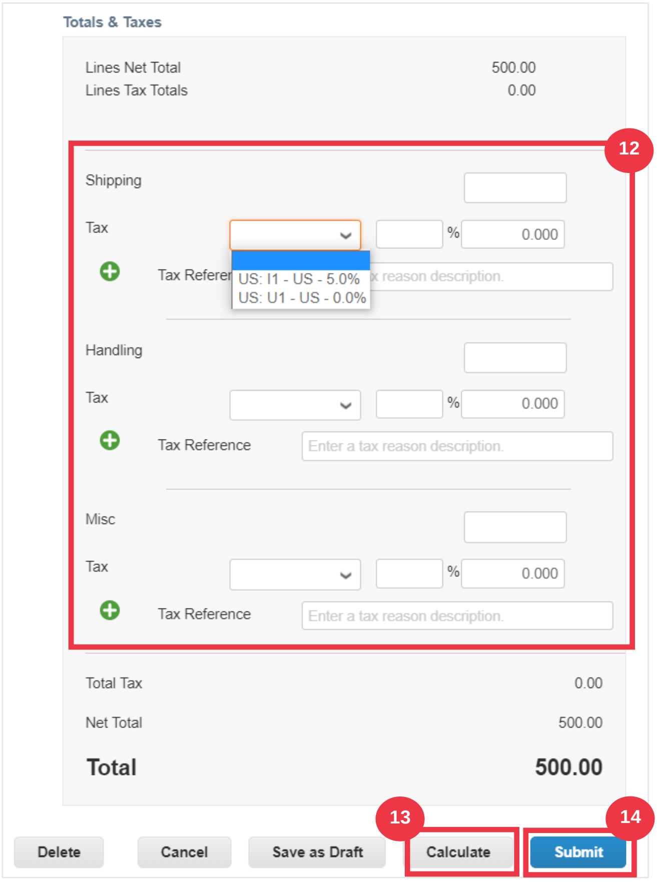


11. Scroll to the **Lines** section and edit the details for the invoice lines in the following fields (if applicable):
    a. **Description**
    b. **Quantity (Qty)**
    c. **Supplier Part Number**
    d. **Withholding Tax**
    e. **NCM Code** (8-digit code that defines any goods that circulate in Mercosur countries)

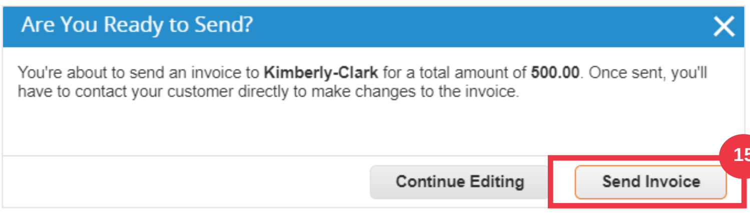


Note: **Service Invoices** can only have **ONE** line. Service Invoices with more than one line will be **disputed.** (Applicable to suppliers for K-C North America only)

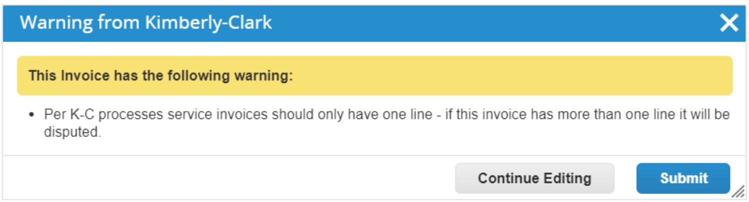
12. Scroll down to the **Totals & Taxes** section and **apply any other header level costs** associated to the PO (e.g., shipping and/or handling tax or any other miscellaneous charges) if applicable. If not applicable, leave the fields blank without amount and tax rate.
13. Click the **Calculate** button to verify the total amount of the invoice.
14. Click the **Submit** button.



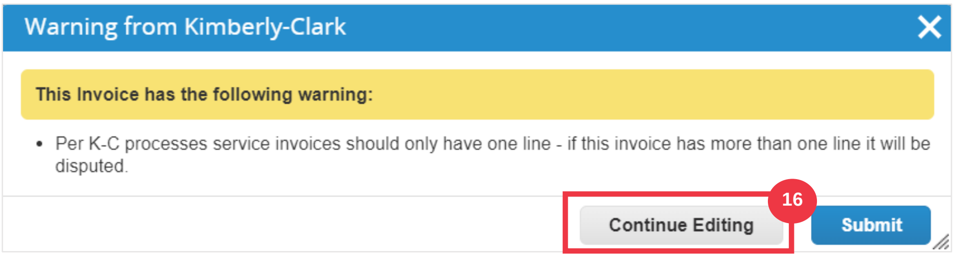
15. Click the **Send Invoice** button to issue the invoice.



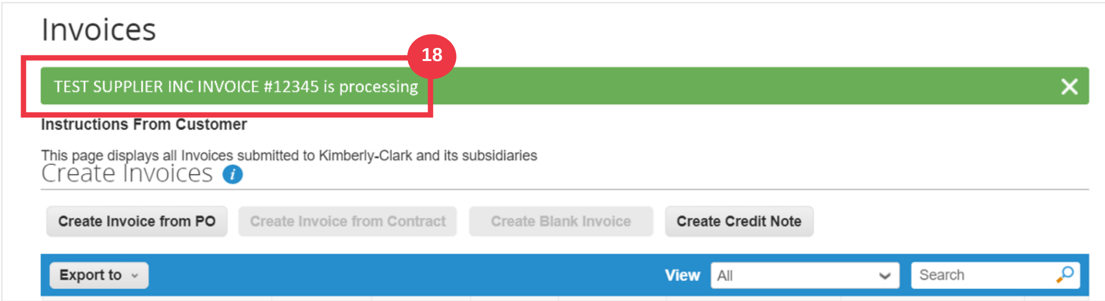
Per K-C processes, **Service Invoices can only have one line. Service Invoices with more than one line will be disputed (Applicable to suppliers for K-C North America only).** If you receive this warning (pictured below), please complete the following:



16. Click the **Continue Editing** button to adjust your Service Invoice to contain only **one** line. Please see **Steps 4-14** for full details on creating an invoice.
17. After you have edited the details, you will proceed to **Step 15** to properly **Send Invoice.**



18. You will receive a confirmation banner that your **Invoice is in processing**. The invoice is now linked and visible within CSP.



Note: For low volume invoice suppliers, Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications. You receive a SAN notification with action buttons and can create an invoice immediately without needing to log into Coupa portal("Create Invoice"). Please ensure that the PO transmission method is 'E-mail' and that the email address of the person/finance team responsible for submitting the invoices is in supplier contacts to allow receipt of a SAN notification with action buttons and invoice status notification.

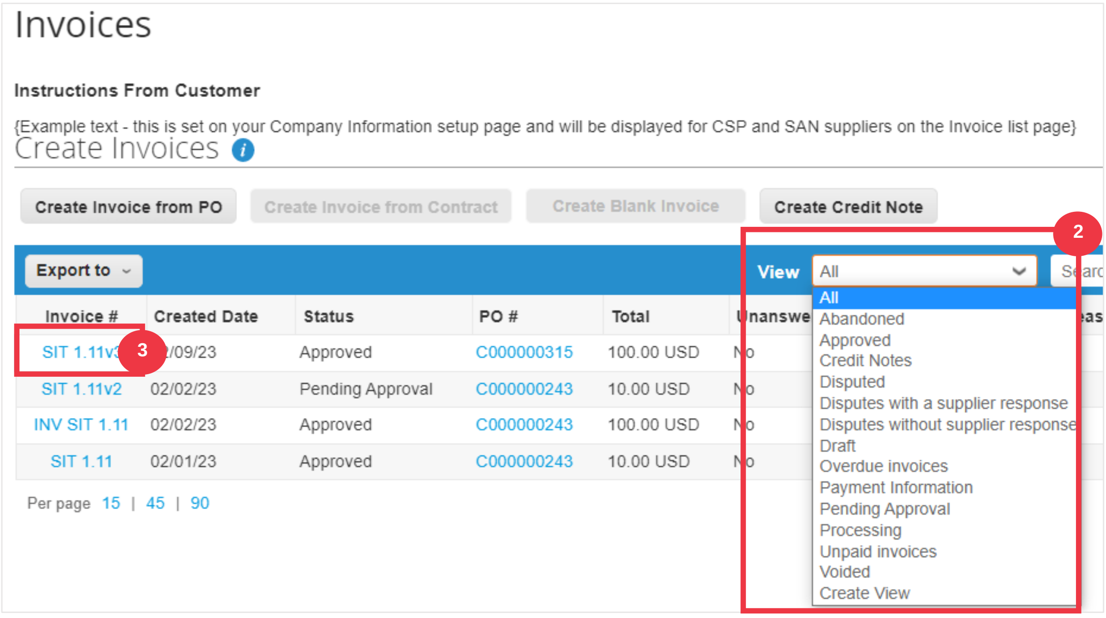
Note: For Europe, Middle East and Africa specific invoice and credit note submission requirements please visit the following link : EMEA Invoicing Requirements

Return to Table of Contents

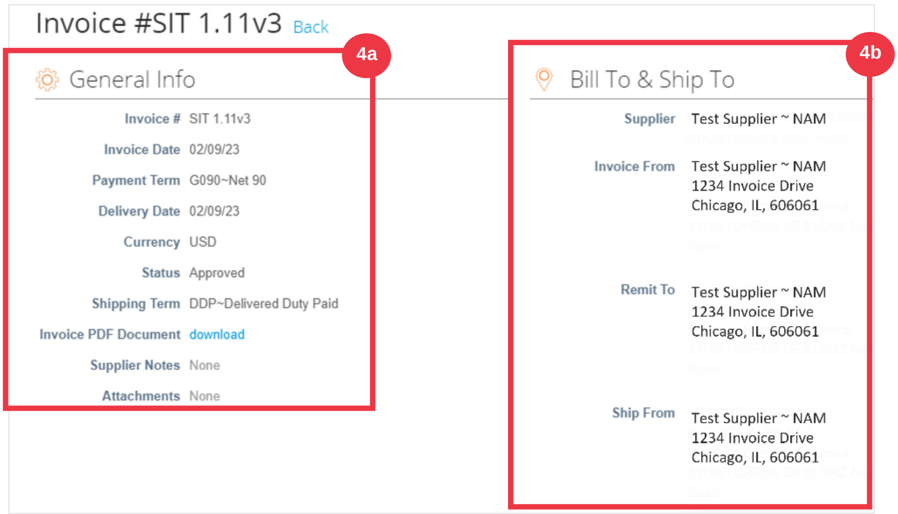
How to View and Search Invoices in the CSP

1. From your **CSP Home** screen, select the **Invoices** tab.

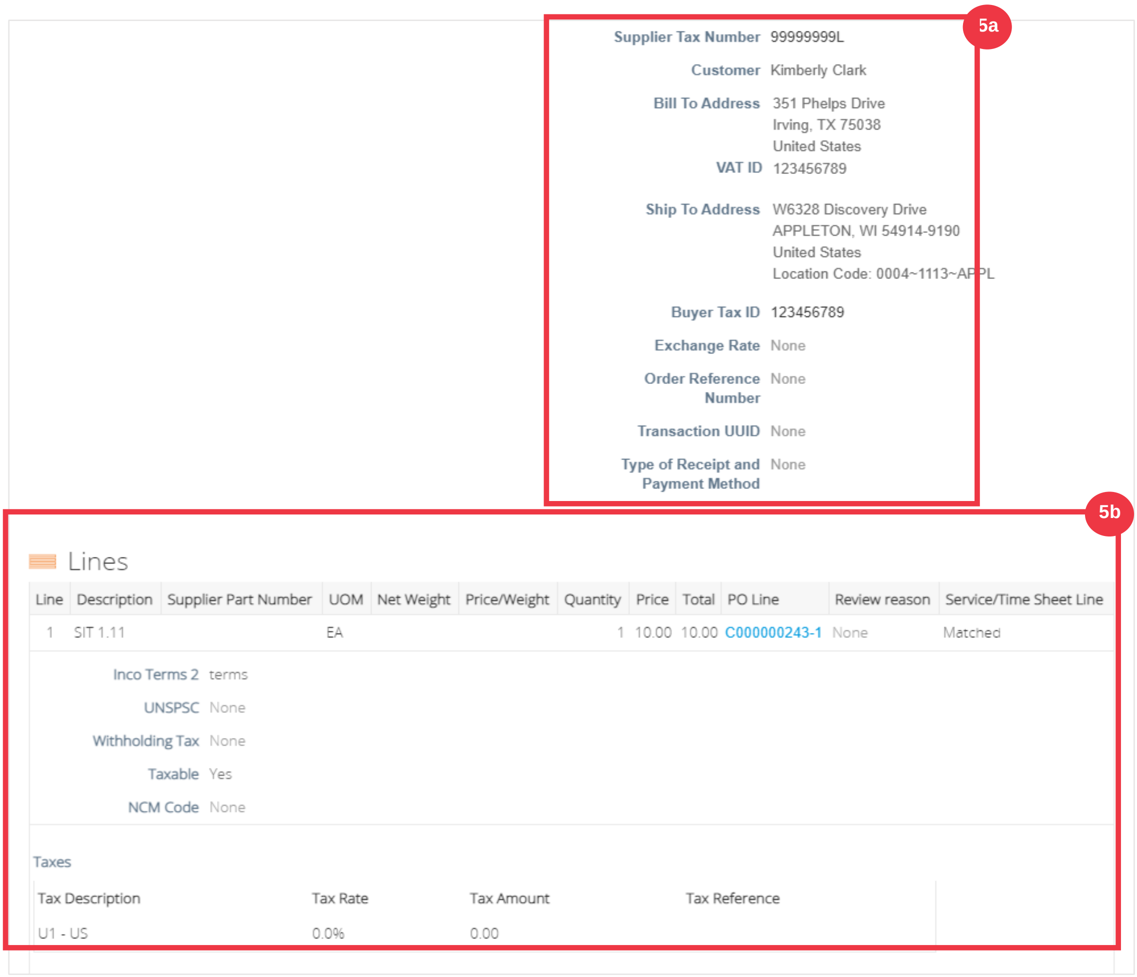
2. Specify a **View** to narrow down the invoices shown in the **Invoice** table.
3. Click the **Invoice Number** to view the details of the invoice.



4. An **Invoice Overview** screen appears that provides you with the following:
   a. **Invoice general information**
   b. **Bill to & Ship To information**



5. Additional invoice information including the following:
   a. **Supplier tax information**
   b. **PO line information**

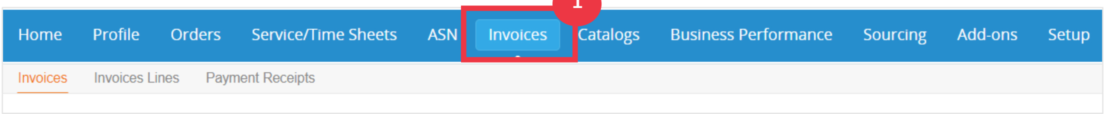


[Return to Table of Contents](#)

How to Track the Status of an Invoice in CSP

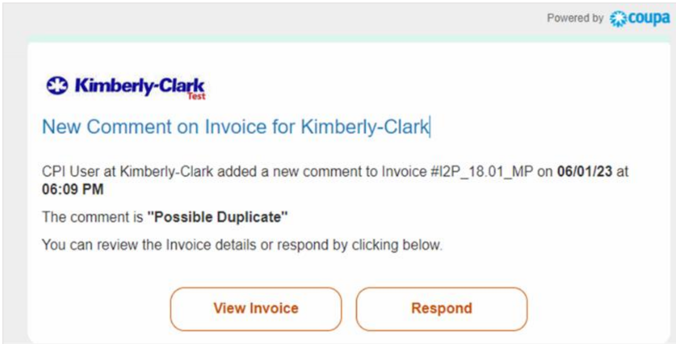
You can track the status of your invoices in the CSP once submitted.

1. From the **CSP home screen**, click the **Invoices** tab.



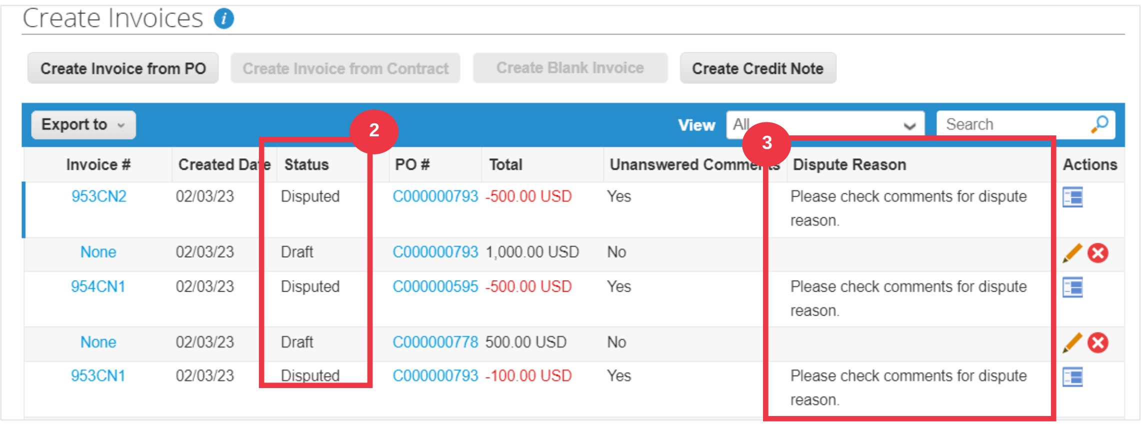
2. Verify the status of the invoice in the **Status** column. Statuses for the invoice are either:

    - **Approved**: invoices that are approved
    - **Disputed**: invoices that you or your customer have marked as disputed to indicate a discrepancy. If an invoice is disputed, CSP will send you an email notification (see below).



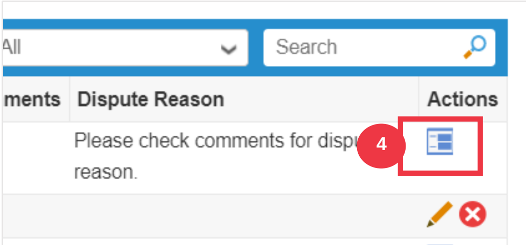
    - **Draft:** invoices that have been created, but not submitted to your customer
    - **Pending Approval**: invoices that have not been approved by your customer yet; contingent on validations processing within SAP. Once validated, the invoice status will change to **Approved**.
    - **Voided:** invoices that rejected or reversed by your customer

3. Check the **Dispute Reason** column for comments from K-C as to the status of the invoice.

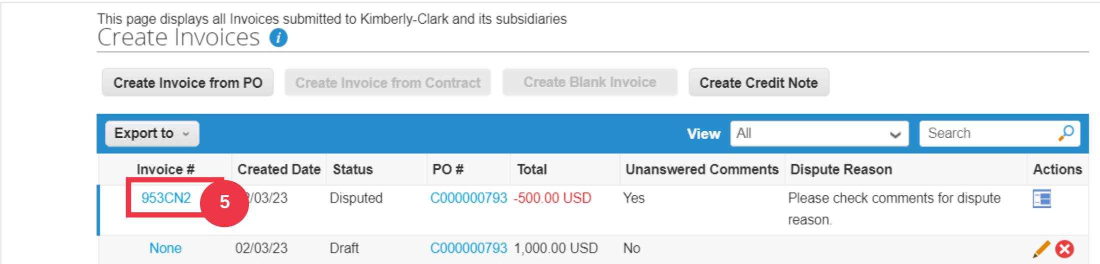


Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
953CN2	02/03/23	Disputed	C000000793	-500.00 USD	Yes	Please check comments for dispute reason.	
None	02/03/23	Draft	C000000793	1,000.00 USD	No		
954CN1	02/03/23	Disputed	C000000595	-500.00 USD	Yes	Please check comments for dispute reason.	
None	02/03/23	Draft	C000000778	500.00 USD	No		
953CN1	02/03/23	Disputed	C000000793	-100.00 USD	Yes	Please check comments for dispute reason.	

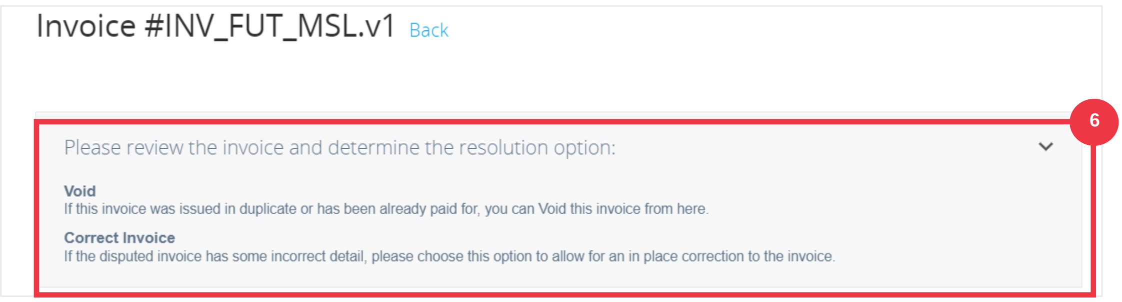
4. To Resolve the invoice, click the **Resolve** icon in the **Actions** column.



5. Click an associated **Invoice number** associated to **Disputed** status to check comments associated to a dispute reason.



6. Click the **Drop-down arrow** to view comments from K-C and determine a resolution for the noted dispute(s) and options for resolution may differ by invoicing template you're using.
    - **Void:** If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.
    - **Correct Invoice:** If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.
    - **Cancel Invoice:** If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. Coupa will guide you through a cancelation credit note and a replacement invoice creation.
    - **Adjust:** If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.



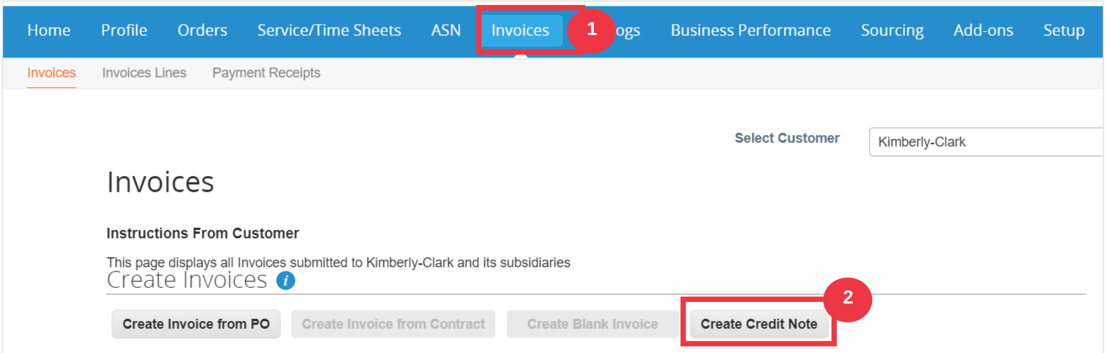
Note: Do NOT Correct or Cancel Invoice, if an invoice is disputed due to attachment size or multiple lines for service invoice. Please submit new invoice instead

Note: For Europe, Middle East and Africa specific invoice and credit note submission requirements please visit the following link : EMEA Invoicing Requirements

Return to Table of Contents

How to Create a Credit Note in the CSP

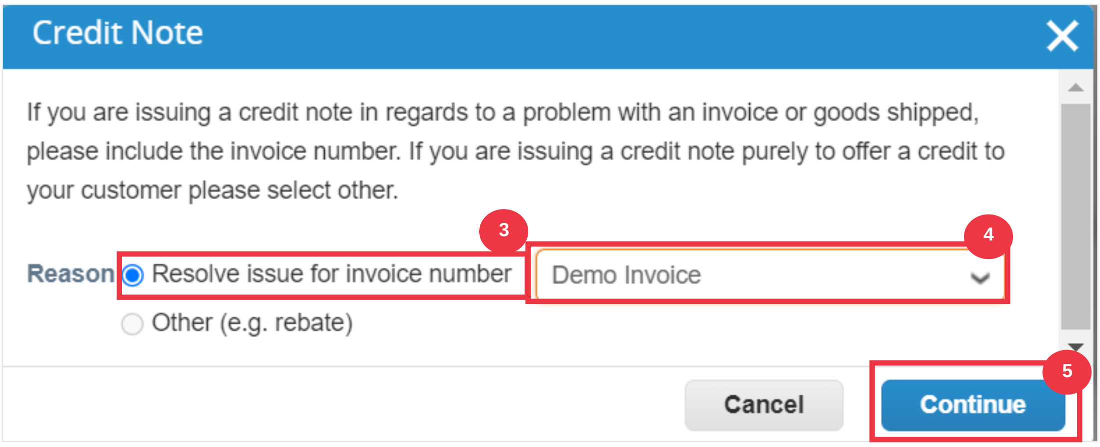
1. From the **CSP home** screen, click the **Invoices** tab.
2. Click the **Create Credit Note** button.



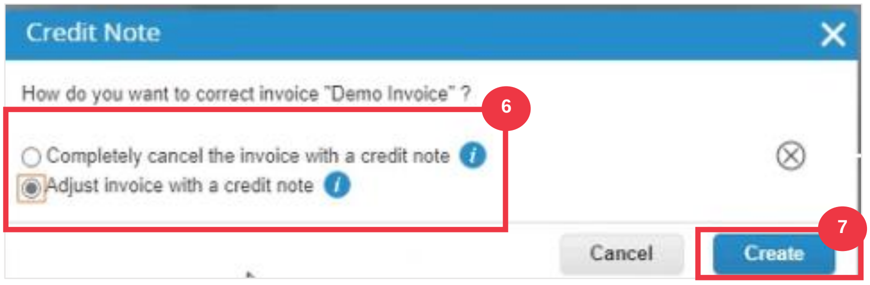
3. Click the **Resolve issue for invoice number** radio button.
4. Select the appropriate **invoice number** from the dropdown list. *The image below was captured with test (staged) data. Please note that while the image below does not indicate a number, a true invoice will have the invoice number listed.*

Note: As a best practice, be sure to capture the invoice number as it will be entered later in this process.

5. Click the **Continue** button.

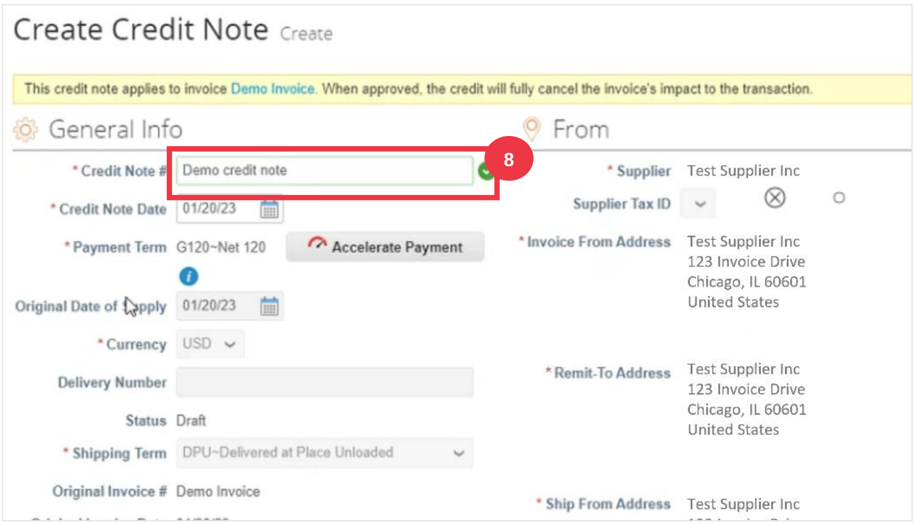


6. Select the appropriate choice from the following radio button options:
    - **Completely cancel the invoice with a credit note**
    - **Adjust invoice with a credit note**
7. Click the **Create** button.



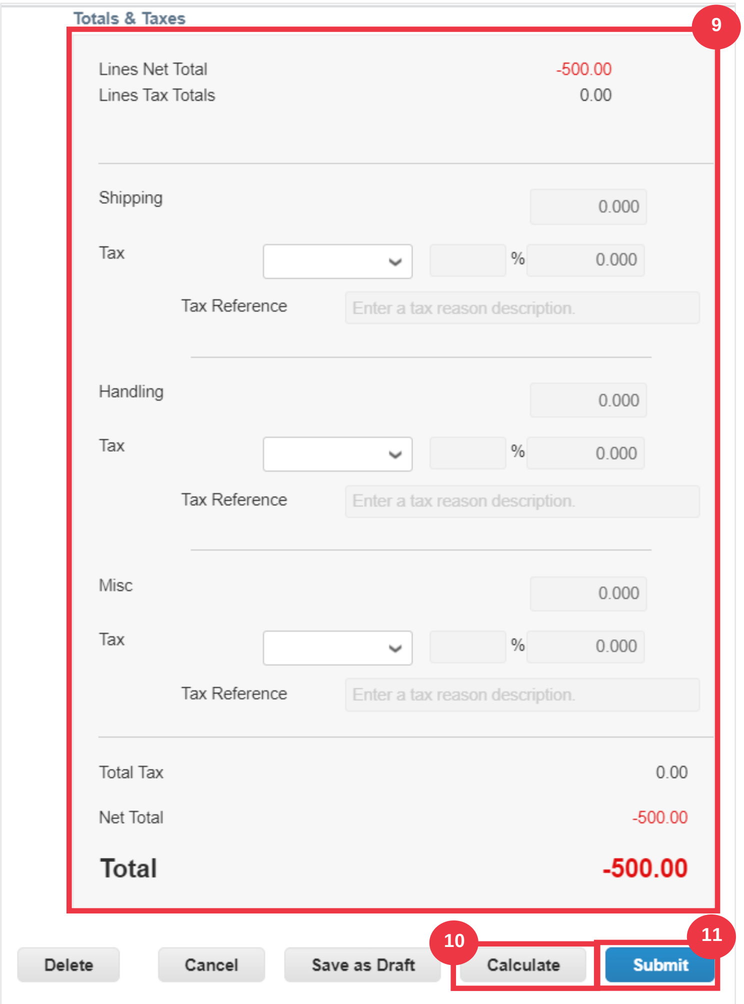
Note: Many of the credit note fields have been prepopulated with the data from the purchase order.

8. Enter the invoice number in the **Credit Note #** field.

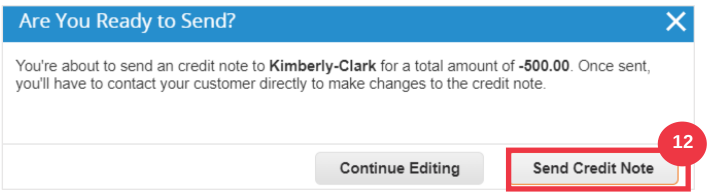


Please continue to next page.

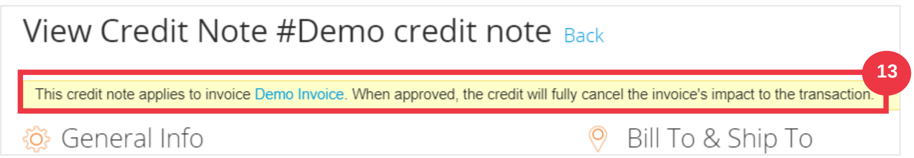
9. Click the down arrow to scroll to the **Totals & Taxes** and apply any other header level costs associated to the PO (e.g., shipping and/or handling tax or any other miscellaneous charges).
10. Click the **Calculate** button to verify the total for the credit note.
11. Click the **Submit** button to submit the credit note.



12. Click **Send Credit Note** within the confirmation window.



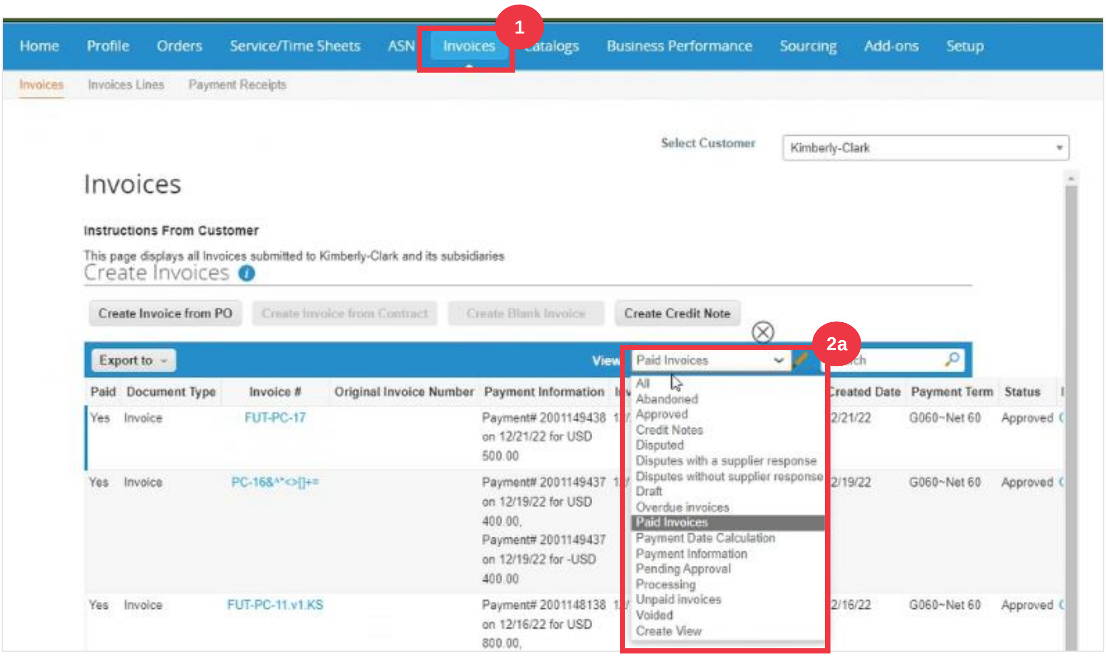
13. The **Credit Note** screen appears to inform you that the credit has not been applied and will fully cancel the invoice when approved.



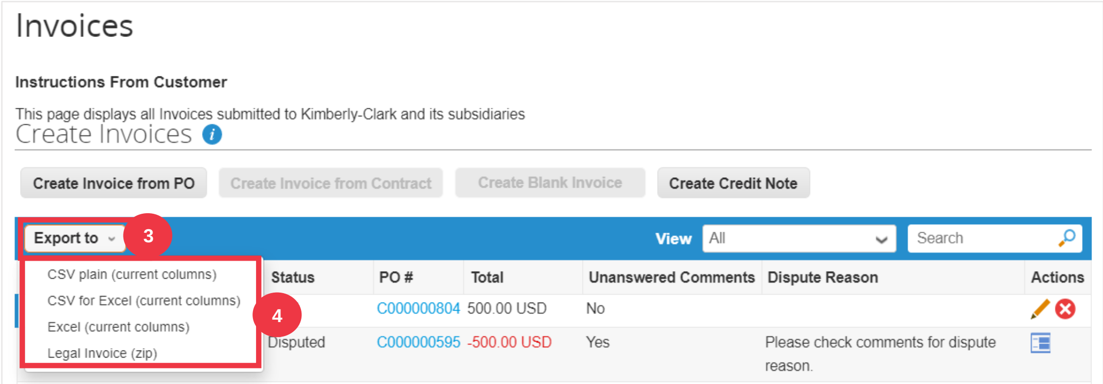
[Return to Table of Contents](#)

How to View Payment Confirmation Details in the CSP

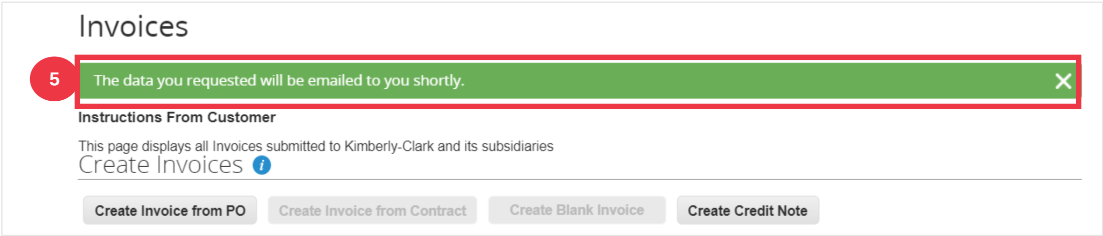
1. From the **CSP home** screen, click the **Invoices** tab.
2. Select a **View** from the drop-down list to filter the invoices that display in the table.
    a. Payment confirmation views consist of the following:
        - **Overdue invoices**
        - **Paid invoices**
        - **Payment information**
        - **Unpaid invoices**



3. Click the **Export to** button if you would like to export an Excel, CSV or .ZIP file for selected view.
4. Select the file type.



5. The notification appears that the **Data you requested will be emailed to you**.



[Return to Table of Contents](#)

Additional Resources

- How to Onboard as a New Supplier for Suppliers – Quick Reference Card
- How to Request Change Order in the CSP – Bite Size Learning
- How to Setup a Legal Entity in the CSP – Bite Size Learning
- How to Create a Credit Note in the CSP – Bite Size Learning
- How to Create Invoices in the CSP – Bite Size Learning
- How to Manage a Legal Entity in the CSP – Bite Size Learning
- How to Submit Vendor Acknowledgement in the CSP – Bite Size Learning
- How to View and Search Invoices in the CSP – Bite Size Learning
- How to View and Search Purchase Orders in the CSP – Bite Size Learning
- How to Respond to the Supplier External Form - Bite Size Learning
- How to Complete and Delegate a DDQ (Assessment) - Bite Size Learning
- How to Respond to Risk Actions - Bite Size Learning