

COUPA USER GUIDE

CSP - COUPA SUPPLIER PORTAL

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WHAT IS COUPA?



It is the world-class solution selected to standardize the TERPEL purchasing process. Through this technological platform we will gain visibility, control and efficiency for decision making:

5,000+

Clients

10M+

Suppliers

125+

Countries

Multi

Currency

Multi

Language

Rated #1 by top analysts

Gartner

Spend
Matters

PayStream
ADVISORS

FORRESTER

IDC

SUPPLIER PORTAL (Coupa Supplier Portal)

Coupa Supplier Portal – CSP

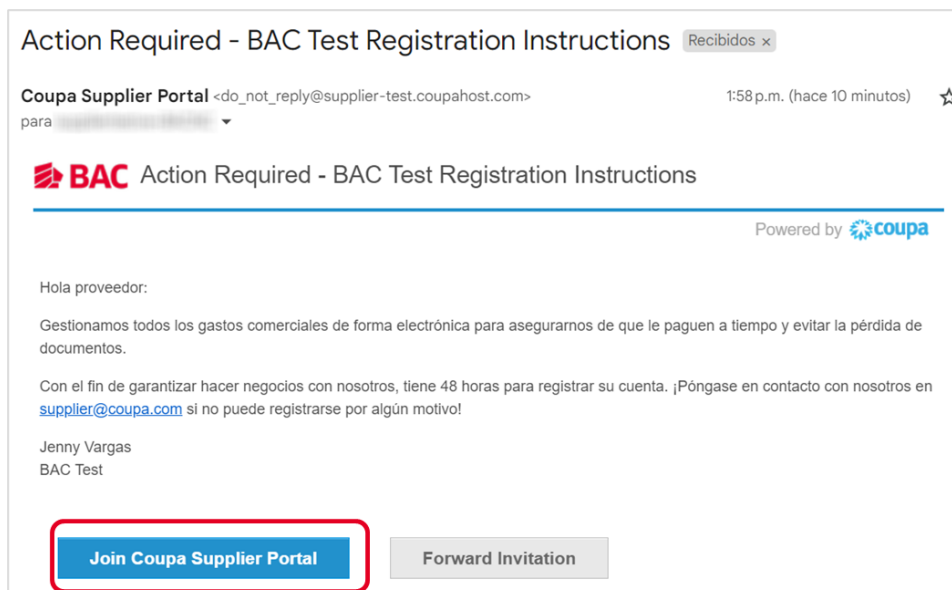
Coupa 's Supplier Portal is where suppliers can manage their purchase orders, create and monitor their invoices and credit notes, among other things. It is a free tool for suppliers to easily interact and collaborate with TERPEL. Interacting on the Portal is free of charge and is an opportunity for other companies, Coupa customers, to find them.

These are the actions that will be enabled in the supplier portal:



REGISTRATION ON THE COUPA SUPPLIER PORTAL (CSP)

1. You will receive an email from Coupa Supplier Portal, indicating that TERPEL has invited you to register for Coupa Supplier Portal:



2. Using the **Join Coupa Supplier Portal** button you will be directed to the Coupa Supplier Portal to begin your registration.
3. Using the **Forward Invitation** button, you will be able to forward this invitation to someone else in your organization by entering their email address.
4. Once you click on the **“Join Coupa Supplier Portal”** option you will need to complete your registration on the portal. You will need to set up your password and agree to Coupa's privacy policy and terms of use.

Create an Account

BAC Test is using Coupa to conduct electronic transactions and communicate with you. We'll walk you through a quick and easy setup for your account with BAC Test so you're ready to do business together.

* Company Name

NETWORK COMMUNICATIONS S.A. (NETCOM)

Your company's legal name (or personal legal name if you're an individual)

* Email

* First Name

José

* Last Name

Miguez

* Password

* Confirm Password

Please use at least 8 characters and include a number and a letter.

* Country/Region

Costa Rica

* Tax Registration

980987666

☐ I don't have a tax ID

☒ I agree to the Privacy Policy and Terms of Use

Create an Account

Already have an account? [LOG IN](#)

[Forward this to someone](#)

After that click on **Create an account**.

5. Enter the verification code sent to your email:



Your Coupa Verification Code

Below is the secure verification code you requested. Enter the 6-digit code in Coupa to verify it's you.

254293

If you didn't request this code please contact us at supplier@coupa.com.

Email Verification

We've sent a one-time verification code to

[Redacted Email Address]

Didn't receive the verification code?
 [Request a new code](#)

Next

6. As next step you will be able to manage the following form with information of the company, at the moment of selecting the country additional fields will be displayed that you must mark if required. Then select Next.

Joining the Coupa Supplier Portal

Complete the necessary information for your business profile before accessing the Coupa Supplier Portal

[Account Details](#)
[Payment Information](#)

Primary Address

* Country/Region

* Address Line 1

Address Line 2

* City

* State

* Zip Code

Next

7. Next you must complete the payment information. The CSP portal will allow you to register different payment methods including Virtual Card, Bank Transfer and Check.

Onboarding to Coupa Supplier Portal

Complete the necessary information for your business profile before accessing the Coupa Supplier Portal

 The primary address has been saved

Account details

Payment information

Virtual card



Customer supported

Enter the following information to receive virtual card payments.

*Payment method name



* Email address

☐ Do not accept virtual card payments from this customer

Next

- After completing all the information, you will finish the initial registration of your profile.

Joining Coupa Supplier Portal

Please complete the necessary information for your business profile before accessing the Coupa Supplier Portal

 Good news! Payment information has been successfully shared with the following customers and validated to receive payments via Coupa Pay: Kao Chemicals Europe SLU and its affiliate Kao Corporation SAU

Account details

Payment information

Bank transfer

Customer Supported

Please enter the following information to receive payments by bank transfer.

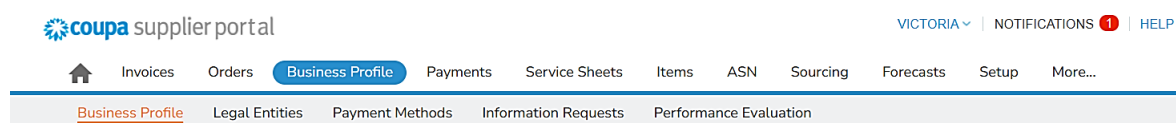
*Payment method name

Note: Completing the payment information is not a mandatory process at the beginning of your account setup, moreover, this information is requested by Coupa and not by BAC. To skip this section, you may not accept payments by each of the methods by checking the box at the bottom of each form as in the example below.



COUPA PUBLIC PROFILE

Coupa's supplier network, when you register on the portal, the platform asks you for a series of data to build your company profile. This information is for public use by Coupa's clients and through this information, Coupa can suggest your company as a potential supplier based on what customers are looking for. For example, based on the goods or services you offer and/or the areas in which you operate. It is your decision if you want to complete some of this data, understanding that it is for Coupa's use and not a request or requirement of BAC.



Softech

[Profile Preview](#) | [Copy Profile URL](#) | [Download as PDF](#)

Your company profile in Coupa's supplier network. Information for public use.

Industry

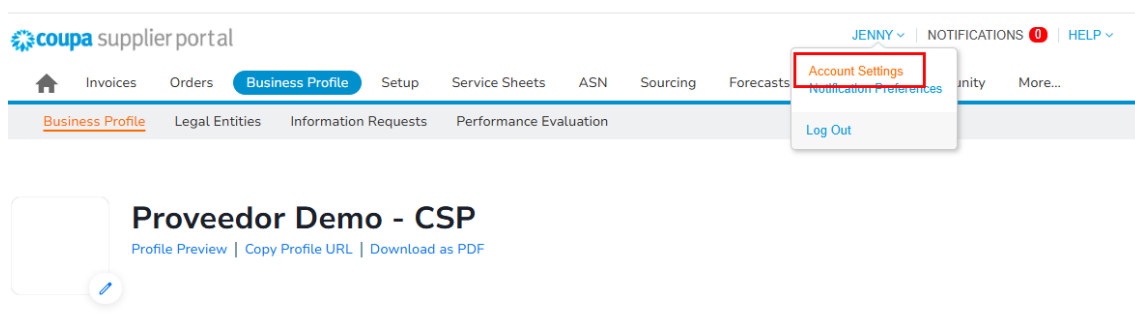
About

Edit your company's "Profile" in Coupa's supplier network.

MULTIFACTOR AUTHENTICATION

To further protect your information, Coupa allows you to enable a second security check known as Two Factor Authentication (2FA). This security method is very common in banking applications and other types of applications, including email, and consists of using a password and additionally a code or token. To do this, you will need an application which you will configure to connect it to your account on the Portal and generate this code for you. There is a long list of applications available for this purpose. When Portal asks you to verify your authenticity to grant you access, you will have to enter the code that is currently valid in your application.

The process below can only be performed by users with **administrator permission**, from the supplier/primary contact:



1. Place the cursor (mouse) pointer over your name, in the upper right corner, and click on ***“Account Settings”***

My Account Security & Multi Factor Authentication

Settings

Notification Preferences

Security & Multi Factor
Authentication

App Connections

Multi Factor Authentication

- ☐ Disabled
- ☒ For Payment Changes (Required for changing Legal Entity or Remit-To)
- ☐ For Both Account Access (Login) and Payment Changes

Via Authenticator App

Use an Authenticator App available from your mobile phone app store.

☐ Default

Via Text Message

Use a code sent via text message to your phone number.

☐ Default

Recent Login Activity

01/24/25 (09:01 AM) - Chrome - Windows - 190.67.216.241

01/23/25 (01:41 PM) - Chrome - Windows - 190.67.216.241

2. In the menu on the left, click ***“Security and multi-factor authentication”***

Multi Factor Authentication via App

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device.
[Learn more](#)
- For most apps, select “Add” or “+” to scan the QR code or copy and paste the security key.

Coupa Supplier Portal



CA4IVCLMRDINRXYTCPX73
ZHLD26LV3PJ

Click to copy Security Key

2 Enter the 6-digit verification code from your device.

Code

Cancel

Enable

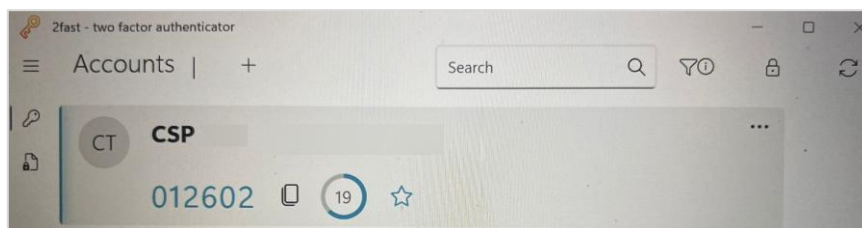
3. Download the authenticator app of your choice.

a. On your **mobile device**

- i. You can download an authenticator app, such as Google Authenticator or Microsoft Authenticator, from the AppStore or Google Play on your computer.
- ii. Enter the application, register (if necessary) and authorize the use of your camera
- iii. Using your mobile device and from the app, point to the screen with the QR code. This will complete the registration of your access to the CSP in said authentication application.
- iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).

b. On your **computer** (desktop application)

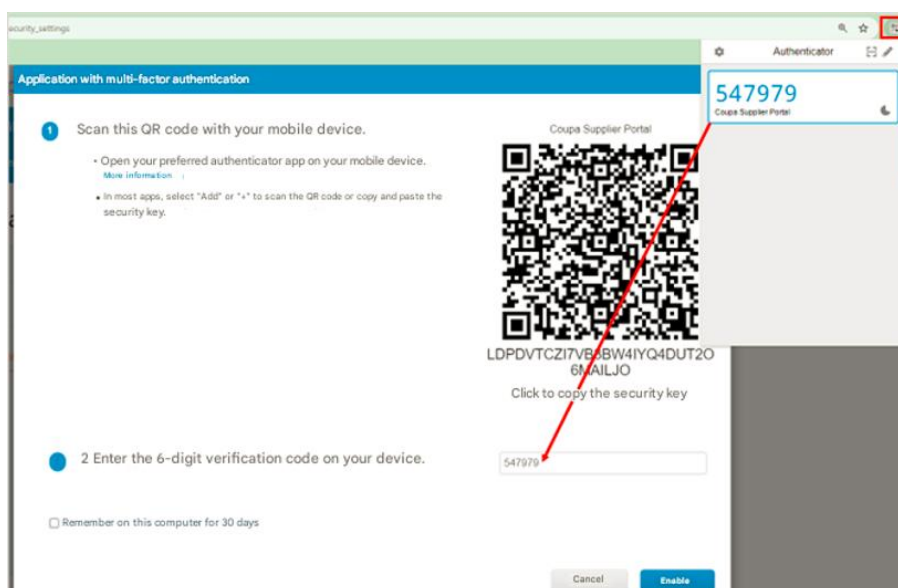
- i. You can download a desktop authenticator app, such as [2Fast](#).
- ii. Please log into the app and register if necessary.
- iii. Enter the code you see on the screen (from the CSP), which you will find just below the QR code. This will complete the registration of your access to the CSP in said authentication application.
- iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).



c. From your **internet browser** (Chrome, Edge, Safari, etc.)

- i. Download/add an authentication extension for your internet browser:
 1. Google Chrome – [Google Authenticator](#) or [Authenticator](#)

2. Mozilla Firefox - [Authenticator](#)
 3. Microsoft Edge – [2FA](#)
- ii. Enter the extension and register if necessary.
 - iii. Scan the QR code from the extension or copy/paste the code you see on screen (from the CSP), which you will find just below the QR code. This will complete the registration of your access to the CSP in said authenticator application.
 - iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).



4. By clicking **“Enable”**, Coupa will generate backup codes to restore access in case you lose your mobile as an access device. It is recommended to download them and leave them in an easily accessible, but safe place.

Save your backup codes x

These codes were generated on July 10, 2024.

Emergency recovery codes are the only way to get in if you lose access to your device or authenticator app.

You can only use each recovery code once.

Store these somewhere safe but accessible.

4A00ZQ	IcLhFg
FXc-aA	VcfS8w
Ao7IHg	eZFELA

Copy

Discharge

Print

- Multi-factor authentication, the configuration screen will open where you can choose for which cases to activate authentication (Payment or Login Changes), whether you want to change the authentication app, whether you want to enable SMS authentication (with additional SMS fees), or whether you want to display or regenerate recovery codes.

My Account Security and Multi-Factor Authentication

Configuration

Notification preferences

Security and multi-factor authentication

Multi-factor authentication

☒ For payment changes (required to change legal entity or sender)
☐ Both for account access (Login) and for payment changes

Using the authenticator app

☒ Use an authenticator app available in your cell phone's app store.
☒ Default

By text message

Use a code sent by text message to your phone number.
☐ Default

[Show recovery codes](#)
[Regenerate recovery codes](#)

INVITATION TO USERS

You can invite other users in your company to also be part of the portal, either by resending the initial invitation with the “Resend this invitation” option (refer to the [CSP Registration section](#)) or from the configuration menu.

1. Select **Settings** at the top of the page.
2. Click the **Invite User** button on the left.

coupa supplier portal

JOSE | NOTIFICATIONS 32 | HELP

[Invoices](#)
[Orders](#)
[Profile](#)
[Payments](#)
[Settings](#)
[Service/Timesheets](#)
[ASN](#)
[Onboarding](#)
[Forecasts More...](#)

[Administrator](#)
[Customer Settings](#)
[Connection Requests](#)

Administrator Users

Users

[Merge Requests](#)

[Merge Suggestions](#)

[Join Requests](#)

[Legal Entity Settings](#)

[Tax Representatives](#)

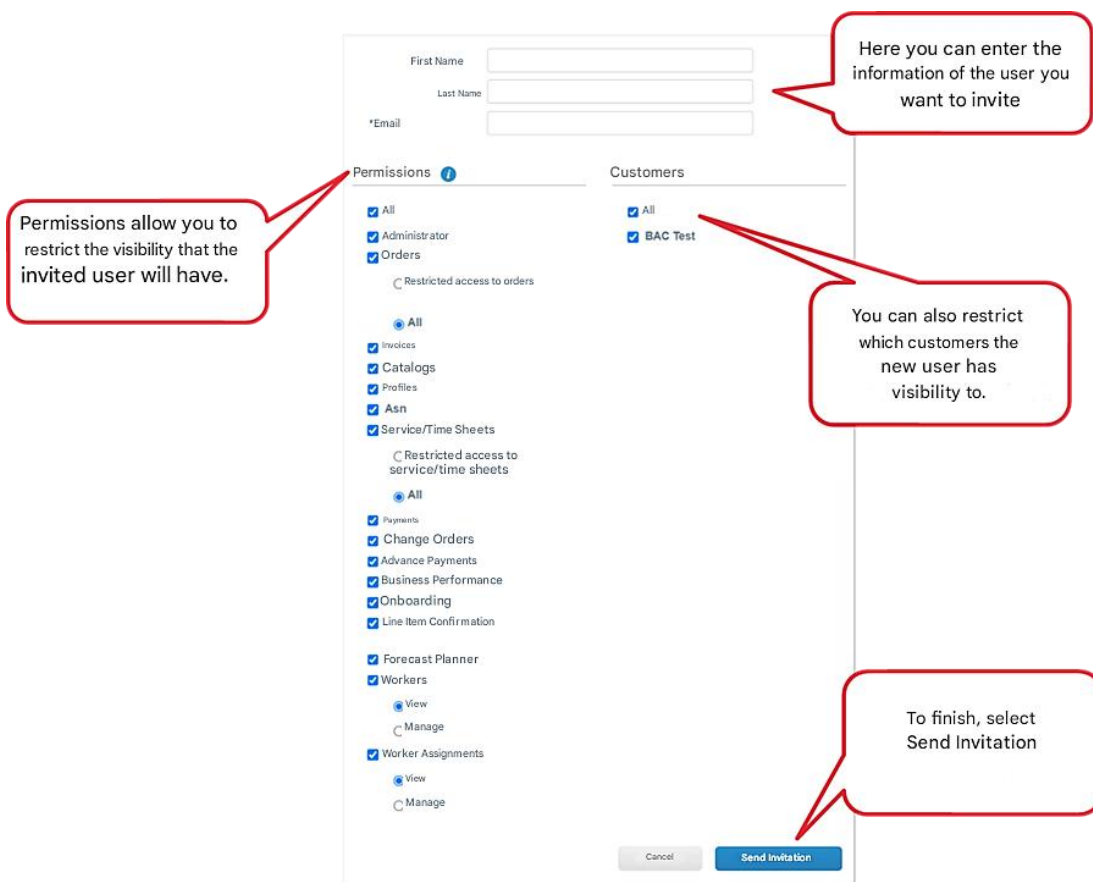
Invite User

View All Search M

Username	Email	Status	Permissions	Customer Access	Actions
Jose Miguez	supplierteste+BACNC@gmail.com	Active	Administrator Asn Order Changes Catalogs Line Item Confirmation Business Performance Invoices Service/Timesheets Onboarding	BAC Test	Edit

After completing the contact information of the person, you are going to invite to the portal, you can assign the permissions that the user will have to view the different tabs and the

corresponding data and send the invitation. From this menu, administrators can assign visibility and access to the information and the client(s) to which the user will have access.



The screenshot shows a user invitation form with the following fields and sections:

- First Name**: Text input field.
- Last Name**: Text input field.
- *Email**: Text input field.
- Permissions**: Section with a list of permissions and checkboxes.
 - ☒ All
 - ☒ Administrator
 - ☒ Orders
 - ☐ Restricted access to orders
 - ☒ All
 - ☒ Invoices
 - ☒ Catalogs
 - ☒ Profiles
 - ☒ Asn
 - ☒ Service/Time Sheets
 - ☐ Restricted access to service/time sheets
 - ☒ All
 - ☒ Payments
 - ☒ Change Orders
 - ☒ Advance Payments
 - ☒ Business Performance
 - ☒ Onboarding
 - ☒ Line Item Confirmation
 - ☒ Forecast Planner
 - ☒ Workers
 - ☒ View
 - ☐ Manage
 - ☒ Worker Assignments
 - ☒ View
 - ☐ Manage
- Customers**: Section with a list of customers and checkboxes.
 - ☒ All
 - ☒ BAC Test
- Buttons**: and .

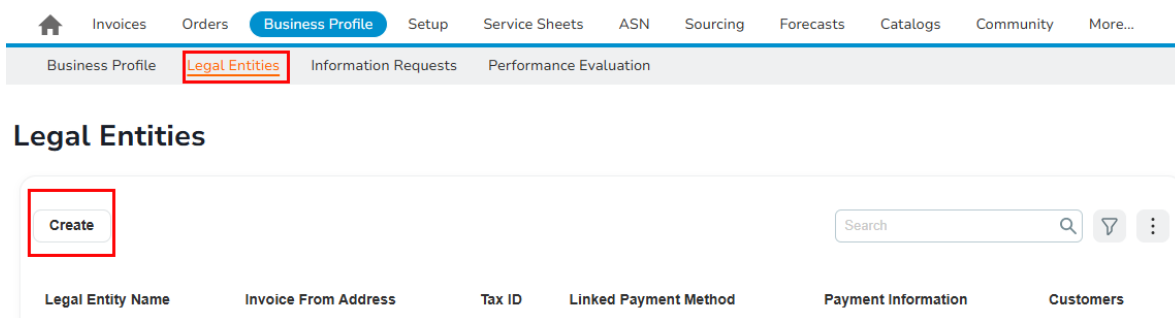
Callouts provide additional information:

- "Here you can enter the information of the user you want to invite" points to the First Name, Last Name, and Email fields.
- "Permissions allow you to restrict the visibility that the invited user will have." points to the Permissions section.
- "You can also restrict which customers the new user has visibility to." points to the Customers section.
- "To finish, select Send Invitation" points to the Send Invitation button.

Upon receiving the invitation, the user must accept the T&C to **Join Coup**. As well as verify their email using the automatically generated code. Once these steps are completed, they will not be asked to enter data related to the company profile. However, if the user has access to the Profile, they can update it at any time.

ADD LEGAL ENTITY

In order to **create invoices** in the CSP, you need to add your “legal entity”. Legal entity is a generic term used by Coupa and is basically used to register the address from which you will be invoicing. This is independent of whether it is a company or a natural person. As you will see below, the portal will ask for the address data as the client(s) applied. This way, the address can be automatically assigned to the invoices that you are going to register in the future. This configuration can only be done by the administrator user of the main supplier/contact:



1. Select **Business Profile** at the top of the page.
2. Select **Legal Entities in the bar**
3. Click the **create button** on the left.

You must complete the requested information:

Create Legal Entity



* Legal Entity Name

* Country/Region

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.



* Country/Region

* Address Line 1

Address Line 2



* City

* State

* Postal Code

Invoice From Code ⓘ

Ship From Address

Please enter the physical address that your goods are shipped from? This can be a warehouse address.



When selecting the country from which you operate and from which you will be billing, the portal may ask you to complete additional data on this screen.

Create Legal Entity



* Legal Entity Name

* Country/Region

Tax Registrations

* Country/Region

VAT ID

[+ Add Tax Registration](#)

Additional Company Information

Mercantile Register ⓘ

You must complete the data for the invoice's origin address. Note that by default the boxes are selected so that this same address is used as **the Remittance Address** and the address from which the invoice is **Sent**. If they are different addresses, you must uncheck the box and in the next screens you can indicate the corresponding address. Remember that VAT ID

is a generic term used by Coupa, as is Tax Registration. Both refer to the unique identifier assigned to your company, when it is registered in the country, for fiscal and tax purposes. In each country this identifier has a different name, in the case of Mexico it would be the RFC.

Click “Save”

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

Country/Region

Address Line 1

Address Line 2

City

State

Postal Code

Invoice From Code ⓘ

Preferred Language

Spanish (Spain)

Ship From Address


Please enter the physical address that your goods are shipped from? This can be a warehouse address.

☒ Same as Invoice From Address

Cancel

Save

Then click “continue”:



Your Legal entity setup is now complete. If you would like to add new Payment Methods to this Legal Entity which your customers can use to pay you, please click continue below.

Close

Continue

Add return address

1. Select **Settings** at the top of the page.
2. Select **Admin** from the bar and **Payment Methods**
3. Click the **Add Return Address** button

Admin Remit-To

- Users
- Merge Requests
- Merge Suggestions
- Requests to Join
- Fiscal Representatives
- Payment Methods**
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)

Add Payment Method			
Payment Method Name	Remit-To Address	Payment Type	Legal Entity
No results found			

Select the Payment Type field.

Add a new payment method

* Payment type

Bank account

Check

Bank account

Virtual card

What are the bank account?

?

Fill in the information displayed, then click on the **Save** button and **continue**.

Account Country/Region Bank: Panama
Account Currency Bank: PAB
Beneficiary Name: Softech
Bank Name:
Account Number:
Confirm Account Number:
Sort Code:
SWIFT/BIC Code:
☐ My bank doesn't have a BIC code
Branch Code:
Bank Account Type: Business
Supporting Documents: Choose Files No Files Selected
Email Address Email: suppliertestve+bactest@gmail.com

What is your shipping address?

Saved Addresses Select
New Address

Recommended

If you receive payments to a different location than where your business is registered, add the address here.

What is your shipping address integration code? (optional)
Who is your shipping contact? (optional)
Which customers can use this account?

☒ All
☒ BAC Test

Cancel Save & Continue

Click “Next”:

Add a new payment method

The payment method lets your customers know where to send their invoice payments. Click Add payment method to add more locations; otherwise, click Next.

Add payment method

Payment method name	Shipping address	Status	
Address	Via Cincuentenario Panama 3 00000 Panama	Active	Manage
Bank account Banco Nacional de Panama Softech *****4321	Via Cincuentenario Panama 3 00000 Panama	Active	Manage

Deactivate legal entity Cancel Next

Click “Done”

Add a new payment method

For many countries/regions, it is mandatory to include different shipping details on the invoice if they are different from the country where your legal entity is registered.

Title
Status

Via Cincuentenario
Panama
3
00000
Panama


Active

Manage

Deactivate legal entity
Done

Once all the requested information has been completed Coupa will show that the Legal entity was successfully added. Click on the **Add Now** button.

Setup Complete



Congratulations!

This legal entity can now be used on new invoices.

To Get Paid - Most clients require that you send them this payment information in addition to providing it on the invoice. [?](#)

- Click the Profile Tab to see if your client has a form that collects payment information.
- If not, you'll need to submit it through another channel.

Add Later
Add Now

It is necessary to have at least one Legal Entity registered in the portal, in order to register and send invoices. However, if you have several entities/companies and invoices from different addresses, you can register several entities. Then for each invoice, you must indicate which entity/address applies.

Note: The addresses used in this manual are fictitious examples.

HOME PAGE

On the portal's home page, you will find an overview of your activity with TERPEL. For example, you will be able to see the latest Purchase Orders received, as well as the latest status changes to your invoices. Here you will also be able to see any important announcements shared by TERPEL. For example, information about an upcoming cut-off in invoice receipts.

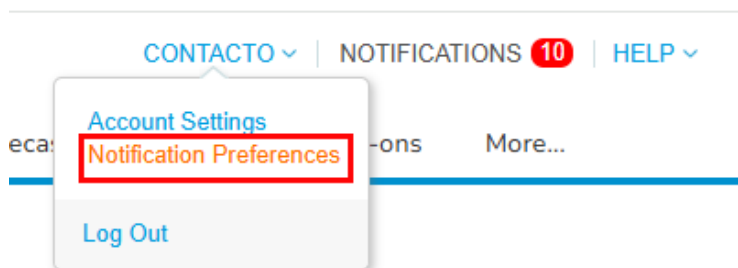
The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information 'JENNY' with a dropdown arrow, 'NOTIFICATIONS' with a red badge showing '10', and a 'HELP' dropdown arrow. Below the header is a navigation bar with links: Invoices, Orders, Business Profile, Setup, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Community, and More... The main content area features a profile card for 'Proveedor Demo - CSP' with a 'PD' icon and a note that the profile was last updated about 21 hours ago. Below this are two sections: 'Recent Activity' and 'Announcements'. The 'Recent Activity' section shows a list of activities, with one entry for 'Kao Chemicals Europe SLU y su a...' and a note that no activity was found for this entity. The 'Announcements' section shows 'No Announcements'. At the bottom, there are four cards: 'Two Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection).

NOTIFICATIONS

You will be able to receive notifications in your email as well as directly in the portal. Once inside the portal, hover over the [Notifications link](#) to see the latest notifications received. Only the three most recent notifications will be displayed, to see all notifications in detail and manage them, click on the **Notifications** or **View all notifications links**:

The screenshot shows the 'NOTIFICATIONS' dropdown menu. The menu is open, displaying a list of notifications. The first notification is 'Profile update reminder is received' with a subtext 'Complete Your Profile to Get Paid Faster and Get Discovered'. The second notification is 'A credit note is approved'. The menu has a close button (X) in the top right corner.

To configure your notifications, select **Notification Preferences**.




My Account Notification Preferences page, all notifications that can be disabled or enabled as Platform notifications (online) and/or by email will appear.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email Mobile(SMS)

 Verify number to receive SMS

Account Access

Merge Request	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Request to Join	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--	--------------------------------	------------------------------

Business Performance

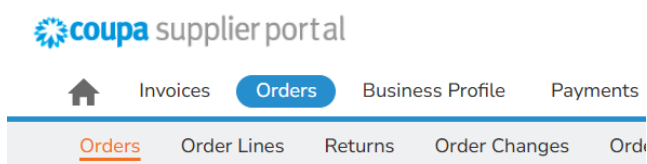
Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
-----------------------------------	--	--------------------------------	------------------------------

When you are finished, select the **Save button** at the bottom of the page.

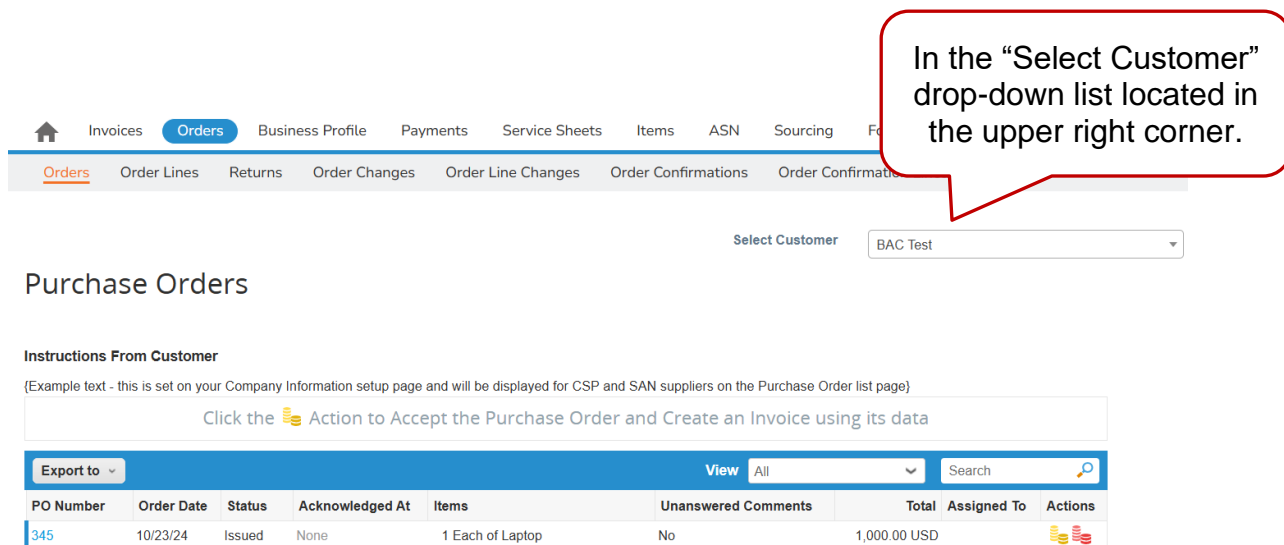


PURCHASE ORDER MANAGEMENT

In the main menu, click on the **Orders** tab. The Orders page appears with the Purchase Orders table. In this section you will have full visibility of the purchase orders that your customer has issued to you.




In this screen you will find a summary of the Orders you have received from BAC. In case you are connected to several clients, from the portal, you will be able to select the client whose orders you want to review.




In the “Select Customer” drop-down list located in the upper right corner.

Purchase Orders

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
345	10/23/24	Issued	None	1 Each of Laptop	No	1,000.00 USD		

In this summary you can see the status of the order, the goods/services ordered and the order total. To view the order detail, click on the order number (blue link).

Purchase Order #9


General Info

Status Issued - Pending Manual
Order Date 05/31/24
Revision Date 05/31/24
Requester Manuel Ricardo Fang Molano
Email mfang@parameta.co
Payment Term None
Attachments None
Acknowledged ☐

Shipping

Ship-To Address 1 Km Este del Indoor club, frente a antiguo Excelsior.
 0 San Jose
 Costa Rica
Terms None

Lines

Advanced <input type="text" value="Search"/> Sort by Line Number: 0 → 9							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Dulces	12	Cantidad	11.00	132.00	0.00
	Supplier Part Number		Supplier Auxiliary Part Number		Manufacturer Name		Manufacturer Part Number
	None		None		None		None

Per page 15 | 45 | 90

Total USD **132.00**

Create Invoice

Save

 Print View

Within each purchase order you will find different options. Print Preview will show you the purchase order in the format in which the order arrives in your mailbox.

**Purchase Order #9****Bill To Address
BAC Test**

PD
PD, 789098
Panama
Attn:

**Ship To Address
BAC Test**

1 Km Este del Indoor club, frente a antiguo Excelsior.
San Jose, O
Costa Rica

**Supplier Details
Softech**

Calle 50 50 40
Panama, 756564
Panama
Attn: Victoria Garzon
suppliertestve+bactest@gmail.com
Phone: +1 (650) 555-1212

General Info

PO Date: 05/31/24
Currency: USD

Line #	Item Details	Quantity	Unit	Price (USD)	Total (USD)
1	Dulces	12	Cantidad	11.00	132.00
Total: 132.00 USD					

Confirmation of Receipt (MIGO)

When the BAC user has confirmed that he/she has successfully received the order or part of it (partial delivery), you can be notified and see the details of the acceptance from the Purchase Order. When you enter the Purchase Order, you will find one or more comments with the details of each recorded receipt. Remember that you can receive a notification in the portal and in your mail when a new comment is registered in the order.

Participants: PIF 4 Coupa

to the supplier

 **PIF 4 Coupa**

SAP position: 00020, Migo: 5000786309, Quantity: 1,000.

to the supplier

 **PIF 4 Coupa**

SAP position: 00010, Migo: 5000786308, Quantity: 1,000

Purchase Order Status

Status	Detail
Issued	Purchase Order was created
Canceled	Purchase Order was cancelled and does not need to be processed.
Provisionally Closed	The purchase order was closed and you will not be able to issue an invoice for it. In case of an error, you can contact your customer to open the order.
Closed	The purchase order was permanently closed. No action can be taken with respect to this purchase order.

INVOICE REGISTRATION AND MANAGEMENT

Invoicing Channels

Each supplier must generate its invoice with the fiscal conditions of its country in its invoicing system. The invoicing channels in COUPA will serve to receive your invoices and validate them automatically or with little interaction from BAC, so that they are approved for payment.

Before registering an invoice, you should always validate that the Purchase Order to be invoiced has already been received by BAC. You can refer to the “Confirmation of Receipt” section to see in detail how to validate that the entry was created.



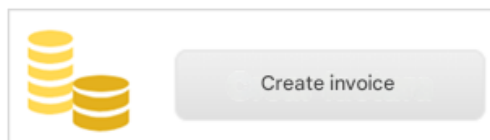
Once you have confirmed receipt by BAC, you will be able to register your invoice using the following option:

1. **Coupa Supplier Portal (CSP):** The supplier portal where you can register invoices and track them. See additional considerations that apply depending on the country you are invoicing from.

Invoice Registration

Physical Invoice (CSP)

From the CSP, you will have access to the purchase orders that BAC has generated. Once you have placed the purchase order to be invoiced and confirmed that it has been duly received, you can use the yellow coins icon or enter the order and from there click on the Invoice button.



Once you have created at least one legal entity, you can proceed with the creation of the invoice. To see step-by-step on how to create the legal entity refer to the Add Legal Entity section. In this case, the portal will take you to the invoice registration screen, bringing the relevant purchase order data to this screen. This is to help you speed up the data entry process, you will need to complete and/or adjust the data as needed. For example, you will need to enter the invoice data, such as invoice number, creation date, currency, among others. The values marked with the red asterisk (*) are mandatory fields and you will have to provide in the attachment field the invoice associated to this billing record (PDF) and also attach the necessary supports.

Create Invoice Create

General Info

* Invoice #

* Invoice Date

05/02/25



Payment Term Z003

* Currency

USD 

Status Draft

Image Scan

Seleccionar archivo

Ningún archivo seleccionado

Supplier Note

* Attachments Add [File](#) | [URL](#) | [Text](#)

Coupa brings most of the purchase order data to the invoice creation screen. Suppliers from Guatemala must complete additional data, to see details go to the “Guatemala” section.

In the Lines you can see the data coming from the purchase order, so you only need to add the respective tax code and adjust the data if necessary.

You can assign taxes by line.

Lines

Line-Level Taxes

Type	Description	Qty.	Units of Measure	Price	
	CRC/SUPPORT	1	Unit	635,906.26	635,906.26
Purchase Order Line 4500278282-1		Service/Time Sheet Line None		Contract 	Supplier Part Number <input type="text"/>
Billing PD					
Type	Description	Qty.	Units of Measure	Price	
	CRC/SUPPORT	1	Unit	635,906.26	635,906.26
Purchase Order Line 4500278282-2		Service/Time Sheet Line None		Contract 	Supplier Part Number <input type="text"/>
Billing PD					

+ Add Line

+ Select Contract Lines

Totals and Taxes

In the **Totals and Taxes** section you can select the tax code or directly assign the corresponding tax rate.

Totals and Taxes

Net Line Total

635,906.26

Shipping

tax

%

0.000

Tax Reference

Enter a description of the reason for the tax

Handling

tax

%

0.000

Tax Reference

Enter a description of the reason for the tax

Additional Costs

tax

%

0.000

Tax Reference

Enter a description of the reason for the tax

tax

0.000

%

0.00

Total Tax

0.00

Net Total

635,906.26

Total

635,906.26

Finally, click on Calculate to update the totals and be able to send the invoice for BAC validation. When sending an invoice from the portal, there will always be a warning from the portal, so you can verify that the invoice you are about to send is indeed for that customer (BAC) and for that amount.

Ready to Submit?

You are about to send an invoice to BAC Test for a total amount of 718,574.07. Once submitted, you will need to contact the client directly to make changes to the invoice.

Continue Editing

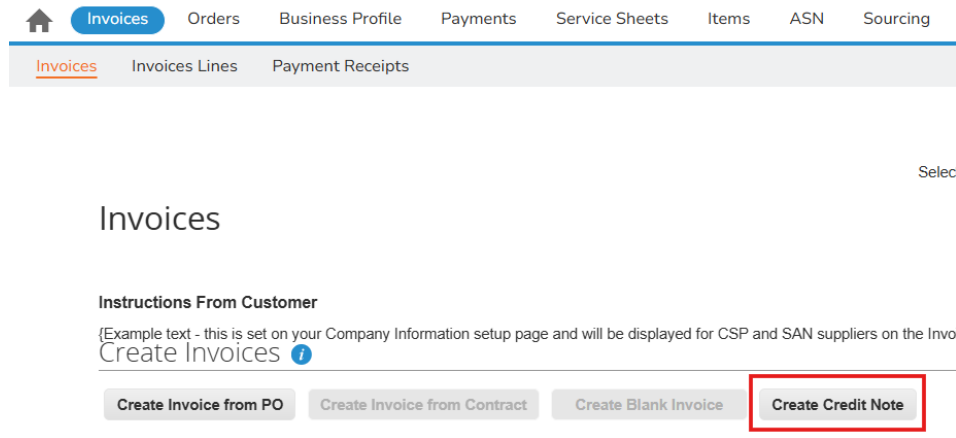
Submit Invoice

Click **Submit** and you will be able to track that invoice/credit memo from the portal.

Credit Note Register

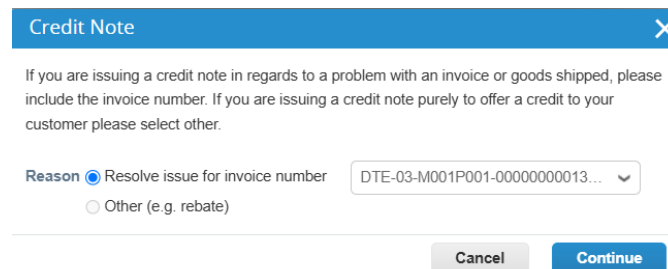
Physical Credit Note (CSP)

In the case of Credit Notes, you will be able to register a Credit Note in the Portal if the invoice to be adjusted has already been processed. The Credit Note will be registered in the Portal, from the Invoices tab.



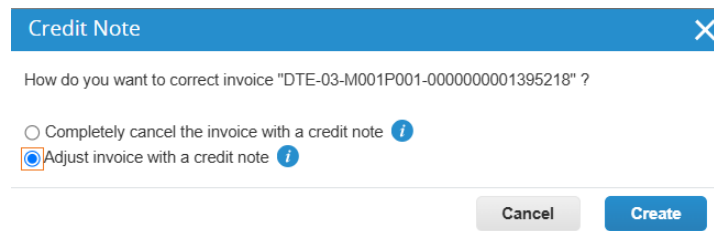
The screenshot shows the 'Invoices' tab selected in the top navigation bar. Below the navigation bar, there are sub-tabs: 'Invoices', 'Invoices Lines', and 'Payment Receipts'. The 'Invoices' sub-tab is active. On the right side, there is a 'Select' button. Below the sub-tabs, there is a section titled 'Instructions From Customer' with a placeholder text: '{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoices Create Invoices}'. Below this, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a red rectangle.

You will need to select the invoice you wish to adjust.



The screenshot shows a 'Credit Note' form. It has a title bar 'Credit Note' with a close button. The main text says: 'If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.' Below this, there is a 'Reason' section with two radio buttons: 'Resolve issue for invoice number' (selected) and 'Other (e.g. rebate)'. To the right of the 'Resolve issue for invoice number' radio button is a dropdown menu showing 'DTE-03-M001P001-00000000013...'. At the bottom, there are two buttons: 'Cancel' and 'Continue'.

And then indicate if the Credit Note is to cancel the total invoice or to partially adjust it.





The screenshot shows the 'Credit Note' form with the question: 'How do you want to correct invoice "DTE-03-M001P001-0000000001395218" ?'. There are two radio buttons: 'Completely cancel the invoice with a credit note' (unselected) and 'Adjust invoice with a credit note' (selected). Both radio buttons have an information icon (i) next to them. At the bottom, there are two buttons: 'Cancel' and 'Create'.

On the Credit Note registration/creation screen, you will find a yellow ribbon with a direct link to the invoice you are adjusting. Similar to the invoice registration, you will have to enter the Credit Note data and the appropriate support.


This credit memo is applied to invoice T0003. Once approved, the credit will adjust the invoice's impact on the transaction.

General Information

*** Credit Memo No.** NC0001 

*** Credit Memo Date** 10/14/24 


Payment Terms Z000


*** Currency CRC** 

Status Draft

Original Invoice No. T0003

Original Invoice Date 10/19/24

*** Supplier** 

Supplier Tax ID 

*** Invoice From** My Supplier


Address Plaza Grecia, Local 12
El Ingenio, Alajuela 20301
Costa Rica


*** Shipping Address** My Supplier Plaza
Grecia, Local 12 El Ingenio,
Alajuela 20301 Costa Rica

Image Scan **Select File** Credit Note.pdf

At the Note line level, you must indicate the type of adjustment you wish to make. That is, whether you will adjust based on the quantity on the invoice line or based on the amount (price).

Lines

Adjustment Type **Quantity** 

Type 

Amount

Price

Other

After completing the data and attaching the corresponding support, you will be able to send the Credit Note. As with invoices, the portal will ask you to confirm that the credit note is for that customer (BAC) and for that amount.

Tracking Invoices and Credit Notes

From the Invoices tab you can track all your invoices and credit notes. You will be able to see the status of each one of them.

Invoices

Customer Instructions
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices ⓘ

Create Invoices from Purchase Orders Create Invoice from Contract Create Empty Invoice Create Credit Note

Export to View All Search

Invoice No.	Creation Date	Status	Purchase Order No.	Total	Unanswered Comments	Dispute Reason	Action
PB01	10/04/24	Approved	None	824.88 USD	No		
0000000133	30/04/24	Pending Approval	None	770.92 USD	No		

In the Status column you will find one of the following options:

Status	Description
<u>Abandoned</u>	The “disputed” invoice has been abandoned.
<u>Approved</u>	The customer has accepted and will pay the invoice.
Dispute	The invoice was placed in dispute and the reason was indicated.
Draft	The invoice was created but has not been sent to the customer.
<u>Pending Approval</u>	The customer is reviewing the invoice.
Processing	<u>AP is processing the invoice</u>
<u>Cancelled</u>	<u>The invoice was cancelled</u>

Inconsistencies in Invoices

In case BAC is not satisfied with your invoice, it will be placed in “Conflict” and subsequently cancelled. The portal will notify you when an invoice is placed in conflict, and you will be able to view the reason why it was not accepted.

Invoices

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}


Create Invoices 

View	Disputed	Se
ented	Dispute Reason	
	Price different from PO/Contract or Catalog	
	Tax rate missing or incorrect	
	Tax rate missing or incorrect	
	Tax rate missing or incorrect	
	Price different from PO/Contract or Catalog	
	Duplicate Invoice. Already paid or payment review in progress.	

Additionally, at the moment of cancelling the invoice, a comment will be added with the reason for cancelling the invoice.

On the other hand, if you register a physical invoice against a PO that does not have the proper receipt, you will find the following comment.

to the supplier



PIF 4 Coupa

10/21/24 at 08:25

The invoice is canceled because not all of the invoiced goods or services have been received

In this case you must first ensure that the PO has the proper confirmation of receipt. Once the receipt is created, you can re-register your invoice against that PO.

Proof of Payment

When the customer brings the payment data to the invoice, you can receive a notification by mail and view the payment details on the portal.

Export to

View

Payment Information

Search

Paid	Purchase Order Number	Invoice Number	Status	Invoice Date	Payment Terms	Delivery Date	Payment Information
Yes	4500278319	MM - 4500278319	Approved	05/11/24	Z000	05/11/24	Payment No. Amount paid on 06/11/24 for USD 3,605.94

When you access the invoice and go to the Payments section, you will find the payment details provided by BAC. For example, the amount and date the payment was made.

Payments				
Status Paid in Full				
Total Payment Date 06/11/24				
Payment Reconciliation Details				
Status	Date	Type	Description	Amount
Posted	06/11/24	payment	Amount Paid	3,605.94

To receive the notification by mail, you must have this option enabled. You can review the step-by-step in the “Notifications” section of this manual.

MANAGEMENT AND REPORT CREATION

Coupa features the concept of Views, which consists of various reports that come pre-loaded on the platform. Each section has its own views, which help you filter transactions in a particular status. You can also create your own views, as well as export the data on screen to a CSV (Comma Separated Values) or Excel file.

Purchase Orders

Instructions From Customer

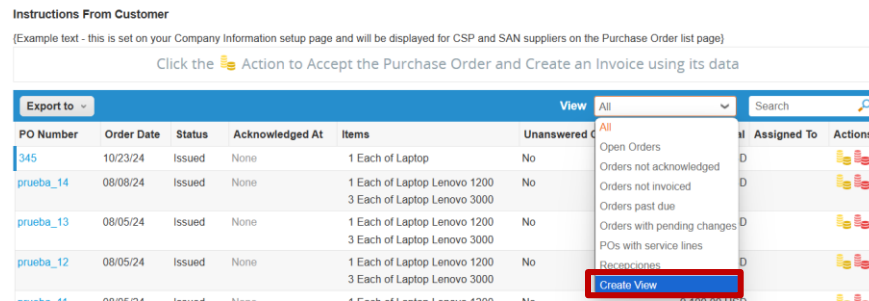
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

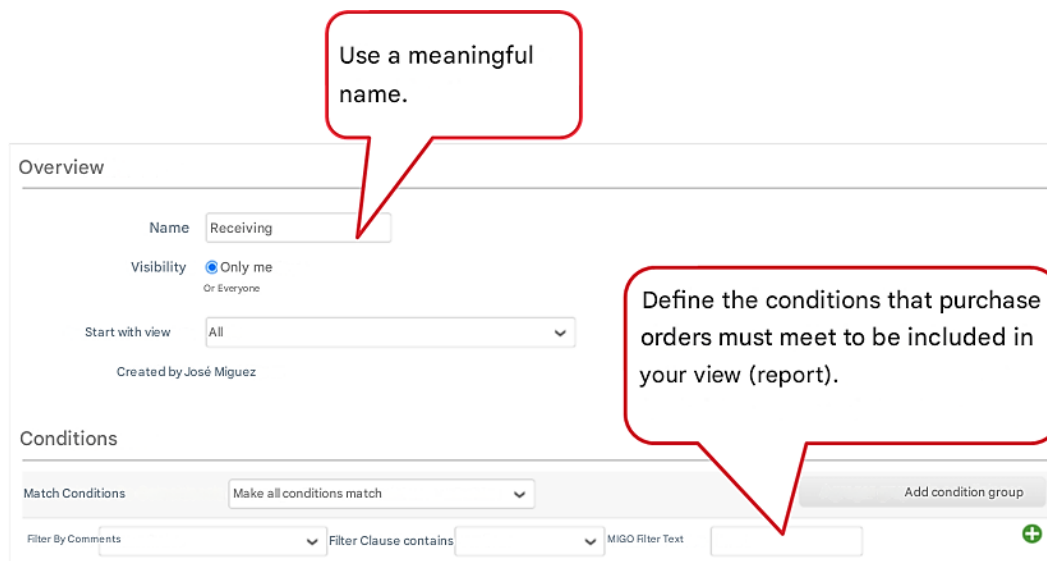
Export to						View	All		Search
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered C		All	Assigned To	Actions
345	10/23/24	Issued	None	1 Each of Laptop	No		Open Orders		
prueba_14	08/08/24	Issued	None	1 Each of Laptop Lenovo 1200 3 Each of Laptop Lenovo 3000	No		Orders not acknowledged		
prueba_13	08/05/24	Issued	None	1 Each of Laptop Lenovo 1200 3 Each of Laptop Lenovo 3000	No		Orders not invoiced		
prueba_12	08/05/24	Issued	None	1 Each of Laptop Lenovo 1200 3 Each of Laptop Lenovo 3000	No		Orders past due		
prueba_11	08/05/24	Issued	None	1 Each of Laptop Lenovo 1200	No		Orders with pending changes		
							POs with service lines		
							Recepciones		
							Create View		
								9,100.00 USD	

For example, in the case of Purchase Orders, you can create a customized view to help you identify which orders have already been received by BAC. To do this, go to the Purchase Orders screen and click Create View at the bottom of the list.

Purchase Orders



For any custom view, you must assign a name that will help you remember what purpose or information the view will filter. You can create a view and share it with other users in your company who have access to this screen. However, we recommend that you use caution to avoid unnecessarily extending the list of views for everyone.



You can add one or more conditions (filters), as well as create groups of conditions and define whether the view should show only transactions that meet all conditions or those that meet at least one of the conditions. The fields in which you can apply the filters will depend on which screen you are creating the view in (Orders vs. Invoices). In this example,

the purpose of the view is to show only Orders that have one or more comments regarding the receipt of the order.

Columns

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

You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns

- Comments
- Payment Agreements
- PO ID

Selected Columns

- PO Number
- Order Date
- Status
- Acknowledged At
- Items
- Unanswered Comments
- Total
- Assigned To
- Actions

Columns that are part of your view.

Default Sort Order

Sort by in ascending order.


[Cancel](#) [Save](#)

In the Columns section, you will find the columns available for you to include in your view, on the left side, and those that are part of your view on the right side. You should move to the left side the fields that you do not require and to the right side the fields that should be included in your view. You can also change the order in which these fields/columns will be displayed. Finally, you can (optionally) define whether the results to be displayed in the view should be sorted based on a particular field. If you want to modify your view, you must click on the pencil icon next to the view name.


Purchase Orders

Customer Instructions


(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click Action  to invoice from a purchase order

Export to

View Receipt 

Search

Actions	Purchase Order Number	Order Date	Status	Items	Total	Comments
	4500278307	10/24/24	Issued	1 CRC/Support & Maintenance Unit Software	628,425.09 PIF 4 Coupa (@PIF 4 Coupa) on 10/24/24 CRC at 3:07 PM	SAP Position: 00010, Migo: 5000786351, Quantity: 1,000

In Invoices you also have a series of views that help you filter by transactions in a particular state or distinguish invoices from credit notes, among other options.

Invoices

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)



Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to 						View 	Search
Invoice #	Created Date	Status	PO #	Total	Unanswered	All	
8b18185e-c7d4-4516-9857-62ed6e8f8a8b	10/17/24	Pending Approval	None	5,610.00 USD	No	Abandoned	
91a164bc-36d2-46a4-bc34-4f6a5f6b3ede	10/17/24	Pending Approval	None	5,610.00 USD	No	Approved	
00101a2b-94a4-401e-88ea-a5b609a7111f	10/11/24	Pending Approval	None	1,942,265.49 CRC	No	Credit Notes	
da0441a3-018e-4a0e-9402-19aa13fb3f4e	10/11/24	Pending Approval	None	1,942,265.49 CRC	No	Disputed	
fb1f1933-36a8-44ea-80db-dd9f4848951a	10/10/24	Pending Approval	None	1,942,265.49 CRC	No	Disputes with a supplier response	
DTE-03-M001P001-000000000139521-13	10/07/24	Pending Approval	None	4.52 USD	No	Disputes without supplier response	
DTE-03-M001P001-000000000139521-2	10/07/24	Pending Approval	None	4.52 USD	No	Draft	
75331aed-f1e7-4f61-80ca-	10/07/24	Pending	None	258.03 USD	No	Overdue invoices	

- All
- Abandoned
- Approved
- Credit Notes
- Disputed
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Overdue invoices
- Payment Information
- Pending Approval
- Processing
- Processing Failed
- Unpaid invoices
- Voided
- Create View