



Supplier Reference Guide

 Coupa Supplier Portal (CSP)

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Introduction and Benefits

The Coupa Supplier Portal (CSP) is a **free** tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy. Depending on your customer's specific Coupa configuration, you can manage content and settings on a customer-by-customer basis, including:

- Receive and view purchase orders, and set up delivery methods
- Send advance ship notices (ASNs) – This feature will not be used at Sherwin-Williams.
- Create, view, and send invoices
- Create and manage customer-specific electronic catalogs
- Manage your public and customer-specific company profiles and remit-to information
- Check the status of transactions with your customers

Register for the CSP

You have the following options by which to register for the CSP:

Customer-Created Invitation

Sherwin-Williams will be sending invitations to suppliers the week of September 30th. When you accept the invitation and create your account, you are automatically connected/linked to the customer who invited you.

Self-Created Invitation

By proceeding with the self-created invitation, you can get started right away. You will need to connect manually by going to supplier.coupahost.com and in the Register pane on the left, fill in the mandatory (email) field (marked with an asterisk), and then click Register to request an invitation. By self-registering, you will need to contact your Sherwin-Williams Supplier Enablement contact at sherwinwilliams.coupa@sherwin.com to provide your email account registration.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main panels. The left panel is titled "Register" and contains the text "New to Coupa? Create Your Account." followed by four input fields: "First Name", "Last Name", "Company", and "* Email". A blue "Register" button is located below the "Email" field. The right panel is titled "Log In" and contains the text "Welcome back!" followed by two input fields: "* Email Address" and "* Password". A blue "Log In" button is located below the "Password" field, and a link "Forgot Your Password?" is located below the "Log In" button.

With both methods, you need access to the email address you are going to use for the account. Your CSP account is based on a specific email address. If you use an email address different from the one your Coupa customers have on file for you, you can't connect with them until you give them the email address or create a CSP account with that email address.

In both cases, you will receive an email with a link to validate your information and create your account.

NOTE: If you don't receive your invitation email, check your spam folder or email your Sherwin-Williams Supplier Enablement contact at sherwinwilliams.coupa@sherwin.com.

My Account Management

After following the link from the Coupa invitation email sent from Sherwin-Williams, fill in the mandatory fields to provide basic information for your account and our company's public profile.

Welcome to the Coupa Supplier Portal

Please validate the information below and create the password for your account.

* First Name

* Last Name

* Company


* Email

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

I'm not a robot 

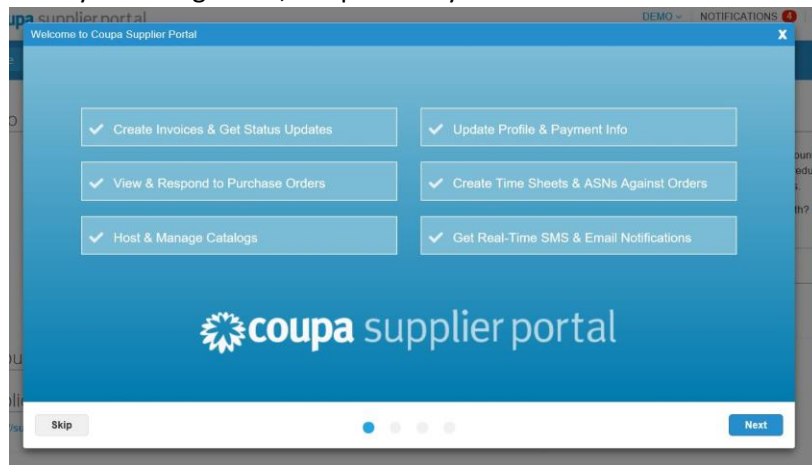
reCAPTCHA
Privacy - Terms

Setting	Description
*First Name	Your personal first name to be applied to your personal account.
*Last Name	Your personal last name to be applied to your personal account.
*Company	The name of your company as seen on your company's public profile .
*Email	This field can't be changed. If you want to change your email address, you have to create a different CSP account using the new email address. If you also want to use this email, create two company accounts and merge them. For more info, see Managing Merge Requests .
*Password	Use this field to create your password. It must be at least 8 characters long, and it has to include a number and a letter.

To create a CSP account, you must also accept the Privacy Policy and the Terms of Use.

By default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration.

Once you are signed in, Coupa takes you on a tour of the new site.



Logging in to the CSP

Go to <https://supplier.coupahost.com/> and in the Log In pane on the right, enter your email address and password and click Log In. When you log in for the first time, you are prompted to enable two-factor authentication.

Logging in with Two-Factor Authentication

Open Google Authenticator on your device and choose your CSP account. Enter the number that is shown.

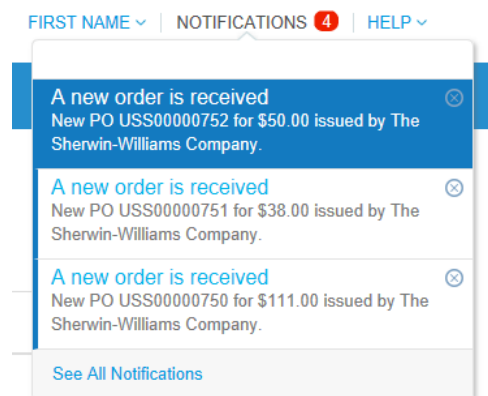
Type the two-factor authentication code in the appropriate field, choose Remember this computer for 30 days if you're not using a shared or public computer, and click Log In.

NOTE: The code that Google Authenticator provides is good only for 60 seconds. If you don't type that code on the CSP sign-in page and click Log In within 60 seconds, you have to get a new code and try again.

NOTE: If you are locked out and you don't have your six-digit backup validation code, contact Sherwin-Williams.

Notifications

In the top right of your window, hover over the Notifications link to see your unread system notifications.



To view details of your notifications and manage them, click on the Notifications link.

My Notifications

Notification Preferences

View All ▾

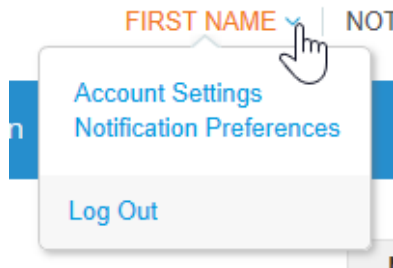
<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	New PO USS00000751 for \$38.00 issued by The Sherwin-Williams Company.	10/01/19 09:35 PM
<input type="checkbox"/>	New PO USS00000750 for \$111.00 issued by The Sherwin-Williams Company.	10/01/19 09:34 PM
<input type="checkbox"/>	New PO USS00000749 for \$186.00 issued by The Sherwin-Williams Company.	10/01/19 09:33 PM
<input type="checkbox"/>	You are now connected to The Sherwin-Williams Company	10/01/19 09:39 AM

Delete

Mark as Read

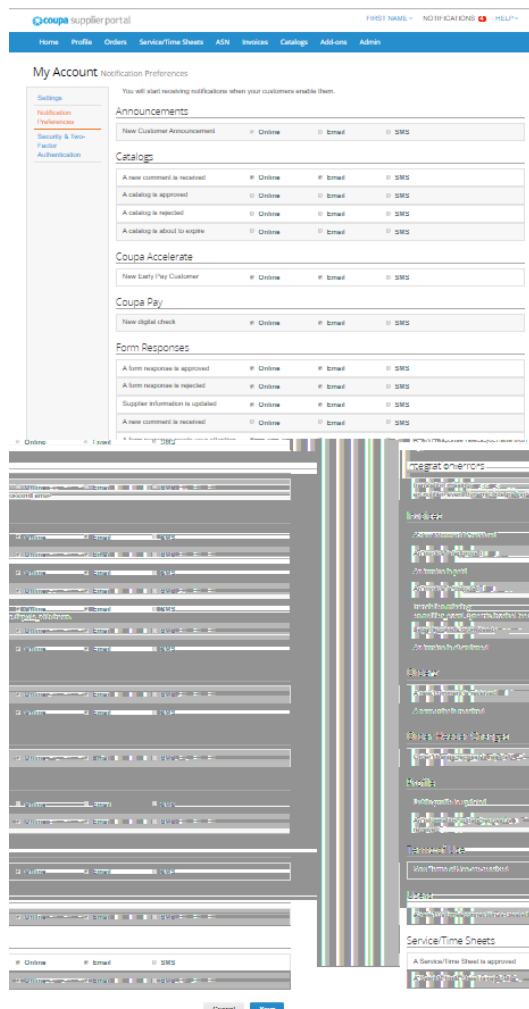
On the My Notifications page, you can view all of your (read and unread) notifications, or you can filter by category (FYI, To Do, or Unread). You can select and delete them all or one-by-one.

To change your notification preferences, hover over your name in the top right and click on the Notification Preferences button. When you begin your introduction to Coupa, it is recommended that you enable all of your notifications until you are more familiar with the system.



On the My Account Notification Preferences page, select the radio buttons for the items that you want to receive any or all of the notification types: online (to do list) or email.

NOTE: If you have an SMS-capable device and you validate your phone number, you can also choose to receive notifications as short text messages via SMS.



Users

From the Admin tab in the top ribbon of your window, you can manage user permissions and Sherwin-Williams access by assigning certain users to certain customers, by limiting what types of documents they can access, and selecting what functions they can perform with their assigned customers.

From the top ribbon, find the Admin tab and then select the Users section on the left of your screen. The Admin Users page appears after clicking this option.

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The top navigation bar is green and contains the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, there is a sidebar with 'Invite User' and 'Admin Users' sections. The main content area displays a table with the following data:

Users	Permissions	Customer Access
FIRST NAME LAST NAME coupatrainingssupplier.sherwin@gmail.com Edit	ASNs Admin Catalogs Invoices Order Changes Orders Payments Profiles Service/Time Sheets	The Sherwin-Williams

Click on the Edit button to open the Edit user access for [User Name] window.

The screenshot shows the 'Edit user access for' window. The window title is 'Edit user access for FIRST NAME LAST NAME'. The window contains the following sections:

- User info:**
 - * First Name: FIRST NAME
 - * Last Name: LAST NAME
 - * Email: coupatrainingssupplier.sherwin@gmail.com
- Permissions:**
 - All
 - Admin
 - Orders
 - Invoices
 - Catalogs
 - Profiles
 - ASNs
 - Service/Time Sheets
 - Payments
 - Order Changes
- Customers:**
 - All
 - The Sherwin-Williams Company

At the bottom of the window, there are three buttons: 'Cancel', 'Deactivate User', and 'Save'.

You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

You cannot change the user's email address. If a user wants to change the email address, you must send a new invitation to that user. To invite a new user, find the Invite User icon in the top right corner of the User page. It is recommended to set up at least two contacts as account Admins in the event of an absence or departure.

The Invite User and Edit user access for [User Name] windows are almost identical, but when you invite a user, you can specify an email address.

Permissions	Description
All	Gives full access to all CSP functions, except for user administration.
Admin	Has full access to all CSP functions, including user administration. Non-admin users can still view the Users tab of the Admin page and invite users, but they can't edit existing users. The permissions on the invitation can't exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. <i>Note: All users, regardless of permissions, can edit the public profile.</i>
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.

Coupa doesn't allow users to be deleted, so you can't delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

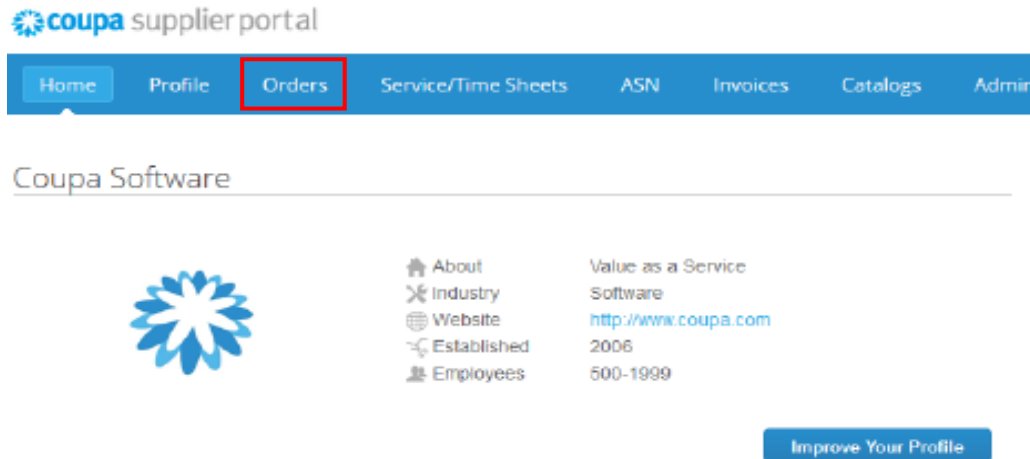
If you deactivate users, you can always reactivate them later. If you reactivate a user, the customer access is reset for that user, so you will have to assign customers to that user again.

Viewing Purchase Orders and Invoices

Purchase Orders

Purchase Order Tab

To start managing Purchase orders, click Purchase Orders. Each purchase order will be given an individual number when raised through Coupa. By clicking on the PO number the details of the PO will be displayed.



The screenshot shows the Coupa Supplier Portal interface. At the top, the logo reads "coupa supplier portal". Below it is a blue navigation bar with several tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin". The "Orders" tab is highlighted with a red rectangular box. Below the navigation bar, the text "Coupa Software" is displayed. Underneath, there is a section with the Coupa logo on the left and a list of company details on the right: "About", "Industry", "Website", "Established", "Employees", "Value as a Service", "Software", "http://www.coupa.com", "2006", and "500-1999". A blue button labeled "Improve Your Profile" is located at the bottom right of this section.

About

Ensure Customer Success, Focus on Results, and Strive for Excellence

You can acknowledge the PO by clicking the Acknowledged box. Click the drop down and select the relevant status. Then, click the calendar and select the relevant date. The bottom section of the PO will display the requested items.

Email Notification of PO

When a purchase order is raised you will receive an email notification regarding this. The email is sent to the PO email address.

NOTE: You will need to log on to the CSP and acknowledge receipt.

PO Delivery Tab

You have the option to change the email address the Purchase Order is sent to by clicking on PO Delivery. Enter the new email address in 'PO email' field.

Flipping Purchase Order (PO) to Create an Invoice

You are able to flip your PO into an invoice. Flipping the PO into an invoice transfers all the PO line information on to an invoice. To flip the purchase order to an invoice, click on the gold coin stack. The invoice screen will be displayed.

To complete the invoice follow the steps below:

Step 1: Create an invoice number

NOTE: When you create each invoice you will be asked to create an invoice number. Note that the same number cannot be used twice.

Step 2: Enter the invoice date

Step 3: The 'VAT' field should be populated, if not enter your VAT number (if applicable)

Step 4: Invoice the amount to be paid by amending the quantity (if applicable)

Step 5: Enter the service value (if applicable)

Step 6: When there are several PO lines, some may have already been invoiced. Please do not include these again as they will need to be deleted. Once all the information has been completed please click Submit.

NOTE: The invoice will be sent for approval before it can be paid.

Invoices

By clicking on the Invoice tab from the main page on the CSP, you will be able to view all of your invoices, the status of each, attachments and comments on each, and the payment information for each invoice.

PO Backed Invoices

To convert or "flip" a PO into an invoice, do one of the following:

- Click on the Create Invoice icon for the PO in the Purchase Orders table.
- Click on the PO Number link to open the purchase order and click on the Create Invoice button.

coupa supplier portal FIRST NAME | NOTIFICATIONS 4 | HELP

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

Orders Order Lines Order Changes Order Line Changes

Select Customer: The Sherwin-Williams Company Configure PO Delivery

Purchase Order #USS00000749

Status: Issued - Sent via Email

Order Date: 10/01/19

Revision Date: 10/01/19

Requester: Lauren Pustulka

Email: lpustulka@spmg.com

Payment Term: 1% 45 DAYS

Attachments: None

Acknowledged:

Shipping

Ship-To Address: SHERWIN-WILLIAMS
4770 HINCKLEY INDUSTRIAL PARKWAY
Cleveland, OH 44109
United States
Location Code: PO HD1 - Receiving Hinckley
Attr: Lauren Pustulka

Terms: None

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Laptop	1	Each	186.00	186.00	0.00
Part Number: None							


Per page: 15 | 45 | 90

Total: 186.00 USD

Create Invoice Save Print View

In the appearing window, choose the Invoice from address. The most recently used address is at the top of the list.

On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO.

Similarly to creating an invoice, you can create a credit note by clicking on the Create Credit Note icon  for the PO in the Actions column of the Purchase Orders table.

In the Actions column, you can create an Advanced Shipping Notice (ASN).


NOTE: The Advanced Shipping Notice (ASN) feature is only available if your customer enables it for you – It WILL NOT be enabled for Sherwin-Williams.

Non-PO Backed Invoices

To create a non-PO backed invoice, click on the Invoices tab on the main menu. If you are connected to more than one Coupa customer, select their name from the Select Customer dropdown menu. Select the No Contract checkbox and click on the Create button on the page that appears.

Coupa Software



 About
 Industry
 Website
 Established
 Employees

Value as a Service
 Software
<http://www.coupa.com>
 2006
 600-1999

Improve Your Profile

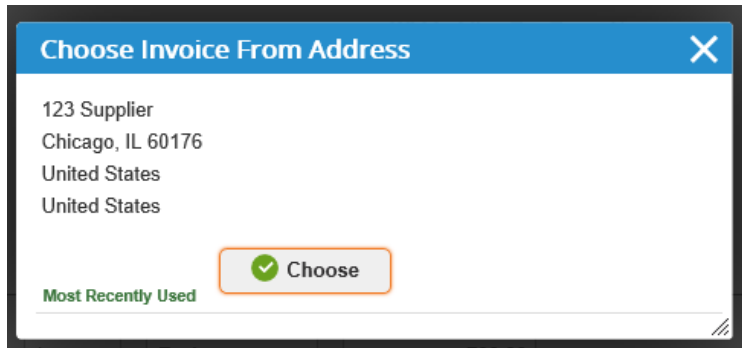
About

Ensure Customer Success, Focus on Results, and Strive for Excellence

To edit a draft invoice, do one of the following:

- Click on the Edit icon for the invoice in the Invoices table.
- Click on the Invoice # link to open the invoice and click on the Edit button.

In the appearing window, choose the Invoice from address. The most recently used address is at the top of the list.



On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk). You have to select an invoice from, a remit-to, and a ship from address by clicking on the icon next to the address field.

coupa supplier portal FIRST NAME ▾ NOTIFICATIONS 0 | HELP ▾

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

Orders Order Lines Order Changes Order Line Changes

Select Customer: The Sherwin-Williams Company Configure PO Delivery

Create Invoice Create

General Info

- Invoice #
- Invoice Date 10/02/19
- Payment Term 1% 45 DAYS
- Currency USD ▾
- Status Draft
- Image Icon No file chosen
- Supplier Note
- Attachments: Add File | URL | Text

From

- Supplier CSP DEMO SUPPLIER
- Supplier Tax ID None
- Invoice From Address: Test
123 Hinckley Road
Cleveland, Ohio 60491
United States
- Remit-To Address: Test
123 Hinckley Road
Cleveland, Ohio 60491
United States
- Ship From Address: Test
123 Hinckley Road
Cleveland, Ohio 60491
United States

To

- Customer: The Sherwin-Williams Company
- Bill To Address: The Sherwin-Williams Co
Attn: Accounts Payable
PO Box 94785
1100-423422-84CAHP-0000-0000-0000
United States
- Ship To Address: SHERWIN-WILLIAMS
4770 HINCKLEY INDUSTRIAL
PARWAY
Cleveland, OH 44109
United States
Location Code: PO,HD1,Resonance

Lines Line Level Tax

Type	Description	Qty	UOM	Price	
Laptop	Laptop	1.00	Each	186.00	186.00

PO Line: US330000729.1 Contract: ▾ Supplier Part Number:

Billing: 0100-423422-84CAHP-0000-0000-0000

Totals & Taxes

Lines Net Total: 186.00

In the Subtotal section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.

Totals & Taxes

Lines Net Total	186.00
<hr/>	
Shipping	<input type="text"/>
<hr/>	
Handling	<input type="text"/>
<hr/>	
Misc	<input type="text"/>
<hr/>	
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
<hr/>	
Total Tax	0.00
Net Total	186.00
Total	186.00

Clicking Calculate will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the Add Line link or the Add icon next to it.

Submit the invoice or save it as a draft to submit it later. You can also add comments for your customer. Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

NOTE: If you want to make changes to the invoice after submitting it, you have to contact your customer.

Frequently Asked Questions (FAQs)

CSP:

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_FAQ

Additional Resources

Feel free to explore the Coupa site for all things CSP! Here you can find additional videos, supplier guides, and more.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal