

Coupa Supplier Portal (CSP) – Quick Reference Guide

The 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 viewing purchase orders, setting up delivery methods, creating catalogues, sending invoices and advance ship notices (ASNs), checking the status of transactions, and more.

1	You will receive an email invitation from 'Coupa Supplier Portal <do_not_reply@supplier.coupahost.com>' with the following heading: PwC UK Registration Instructions – Action Required.	6	If you are hosting a catalogue (including Punch out) go to the catalogue menu option and create a catalogue and add the relevant products agreed/purchased by PwC to the catalogue. Ensure items have clear descriptions, images, UNSPSC codes and other key information entered.
2	Click on the Join Coupa button at the bottom of the email.	7	If you are using cXML the link will need to be set up on the catalogue Tab. This will need to be done in conjunction with your PwC contact.
3	Complete the registration process to create a CSP account (new Coupa users only). Please note a single account can be used for multiple customers so if you already have a CSP account you do not need to register again. You need to ensure you add PricewaterhouseCoopers UK as an additional customer.	8	Use the following link: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal to find out additional information about Coupa's CSP.
4	Follow the CSP set up process to add details about your company including remit to details (<u>Remit To address, bank details etc</u>). Details can be amended at a later stage as required. The CSP account is only accessible by login and password going forward. <u>PLEASE NOTE SETTING UP YOUR BANK DETAILS IS ESSENTIAL FOR SUCCESSFUL PAYMENTS TO BE MADE</u>	9	PwC will issue a PO via the CSP to enable you to check it's working as expected and you are able to 'flip' the PO into an Invoice, add any additional information required and submit the Invoice to PwC.
5	Check PwC UK is now set up as a customer on the Homepage of the CSP.	10	If you have any issues or questions during the setup process please refer to the Coupa Success Portal or contact uk_finops_helpdesk@pwc.com
		11	Please note that your CSP should be regularly monitored as this is where future Purchase Orders will be received from PwC and Invoices generated to be sent to PwC. Payment details will also be shown in the CSP.


Coupa Supplier Portal (CSP) – Raise an Invoice linked to a single Purchase Order (Quick Reference Guide)

Once you have successfully set your company up on the CSP you will be able to receive Purchase Orders (PO) and raise, issue and monitor Invoices. To raise an Invoice please follow these steps

1	When an invoice is due to be issued against a PO received from PwC via Coupa (based on contract terms or PO), go into the Orders menu options where the POs will be listed in a table. To the right of the PO table you will see a pile of gold coins (the first pile of coins) under the Actions heading	6	Scroll down to the Lines section of the Create Invoice screen. Depending on the PO you may see 1 or many lines here. If you are invoicing for a single line in full you just need to select the VAT rate e.g. 20% from the drop down menu
2	Click on the gold pile of coins which will take you into the Create Invoice screen	7	If you are invoicing for part of the goods/ services described on the PO you need to take the following actions: 1. Amend the description to reflect the period/month you are invoicing for. The existing description is likely to be for a full year. 2. Amend the Price field to cover the amount you are invoicing for, for example the PO might cover a 12 month amount, but your invoice is for a single month, 3. Select the VAT Rate from the drop down menu. 4. Repeat this for any other lines on the PO. 5. If there are lines on the PO which are not being invoice for on the current invoice remove that line from the invoice by clicking on the white X to the right of the line description
3	If prompted by a pop up box, select the Legal Entity you are invoicing from and click Save. If you have followed the CSP setup steps and only have a single invoicing entity you will not see a pop up box	8	Once all line Descriptions, Prices and VAT Rates have been updated and all attachments added, scroll to the bottom of the Create Invoice screen and click on the Calculate button which will calculate the VAT to be added to the invoice
4	On the Create Invoice screen enter the Invoice # - this must match the Invoice # from your internal invoicing system (ERP) so you can track payment of your invoices.	9	Click Submit button and then the Submit Invoice pop up button to issue the Invoice to PwC. You can now monitor the Invoice's progress via the Invoices menu option from the Home page.
5	Wherever possible, please attach the PDF invoice from your internal system and any other supporting documents using the Attachments function		

Coupa Supplier Portal (CSP) – Raise an Invoice linked to multiple Purchase Orders Quick Reference Guide

Once you have successfully set your company up on the CSP you will be able to receive Purchase Orders (PO) and raise, issue and monitor Invoices. To raise an Invoice please follow these steps

1	When an invoice is due to be issued against a PO received from PwC via Coupa (based on contract terms or PO), go into the Orders menu options where the POs will be listed in a table. To the right of the PO table you will see a pile of gold coins (the first pile of coins) under the Actions heading	7	If you are invoicing for part of the goods or services described on the PO you need to take the following actions: 1. Amend the description to reflect the period/month you are invoicing for. The existing description is likely to be for a full year. 2. Amend the Price field to cover the amount you are invoicing for, for example the PO might cover a 12 month amount, but your invoice is for a single month, 3. Select the VAT Rate from the drop down menu. 4. Repeat this for any other lines on the PO. 5. If there are lines on the PO which are not being invoice for on the current invoice remove that line from the invoice by clicking on the white X to the right of the line description
2	Click on the gold pile of coins which will take you into the Create Invoice screen		
3	If prompted by a pop up box, select the Legal Entity you are invoicing from and click Save. If you have followed the CSP setup steps and only have a single invoicing entity you will not see a pop up box	8	To add lines from a different PO click on this link:  which is below the main Lines section then identify which PO you wish to add lines from and click on the + button to the right. The lines associated with that PO will appear in the box towards the top right of the screen. Once you have identified the PO/Lines you want on the single invoice click on the Finish button and return to the main Invoice screen
4	On the Create Invoice screen enter the Invoice # - this should match the Invoice # from your internally invoicing system so you can track invoices.		
5	Wherever possible, please attach the PDF invoice from your internal system and any other supporting documents using the Attachments function	9	Once all line Descriptions, Prices and VAT Rates and attachments have been updated scroll to the bottom of the Create Invoice screen and click on the Calculate button which will calculate the VAT to be added to the invoice
6	Scroll down to the Lines section of the Create Invoice screen. Depending on the PO you may see 1 or many lines here. If you are invoicing for a single line in full you just need to select the VAT rate e.g. 20% from the drop down menu	10	Click Submit button / then the Submit Invoice pop up button to issue the Invoice to PwC. Monitor the Invoice's progress via the Invoices menu option on the Home page

Coupa Supplier Portal (CSP) – Check List

Please ensure the following activities have taken place to ensure a smooth transition for your company to trade with PwC using Coupa

Joining the CSP

1	Join the Coupa Supplier Portal (CSP) from the invitation link you've received from PwC
2	Make sure Remit To Address and Bank details are added against your Coupa profile in the CSP to ensure smooth payment following invoice receipt by PwC. <u>PLEASE NOTE SETTING UP YOUR BANK DETAILS IS ESSENTIAL FOR SUCCESSFUL PAYMENTS TO BE MADE</u>
3	Speak to your Accounts team to ensure they are aware of the Coupa process
4	Stop issuing Invoices via email to PwC and only issue them by 'flipping' the Purchase Order (PO) in the CSP to create an Invoice
5	Set up notifications in the CSP to help you manage Orders
6	Use the CSP to monitor Orders, Invoices and Payments to and from PwC as well as receiving notifications, comments and queries relating to your Invoices.
7	Advise PwC if any of your details change - contact, address, bank details
8	Add additional CSP users as required and determine their permissions

Raising an Invoice

1	Once you start using the CSP to issue invoices <u>do not</u> send invoices via email. If you receive a PO via the CSP the Invoice must only be sent to PwC via the CSP
2	Make sure you have created your company Legal Entity and added Remit To details including bank account details in the CSP. This will ensure a smooth invoicing process to ensure smooth payment following invoice receipt by PwC
3	Check all relevant people in your company are aware of the changes including the Accounts/AP team
4	On the Create Invoice screen enter the Invoice # - this must match the Invoice # from your internal invoicing system (ERP) so you can track payment of your invoices. Remember to update the description, Price and VAT fields to cover the month/activity you are invoicing for. A PO may cover a full year's spend or all elements of an SOW whereas your invoice is for part of the PO value
5	Wherever possible, please attach the PDF invoice from your internal system and any other supporting documents using the Attachments function. This may be a breakdown of the invoice details, your original invoice from your invoicing system for example
6	Monitor POs and Invoices via the CSP. You can set up your system notifications by
7	Advise PwC if any of your details change - contact, address, bank details