



Coupa Procure to Pay Training Manual

African (excluding RSA) & International Suppliers

Description

This course explains the different processes that is required in Coupa for Procure-to-Pay (P2P) from a suppliers perspective.

Contents

The course covers the following areas:

1. How to set up notification preferences
2. Receiving and acknowledging POs
3. How to Invoice on the CSP
4. How to Resolve a Disputed Invoice
5. How to Create a Credit Note
6. How to Fix Remit-to Errors
7. When and How to Log a Call with Coupa



TOGETHER
TOWARDS
TOMORROW

SET UP NOTIFICATION PREFERENCES

Description

This course explains the process of setting notifications on the Coupa Supplier Portal (CSP).

Objectives

After completing this course, you will be able to:

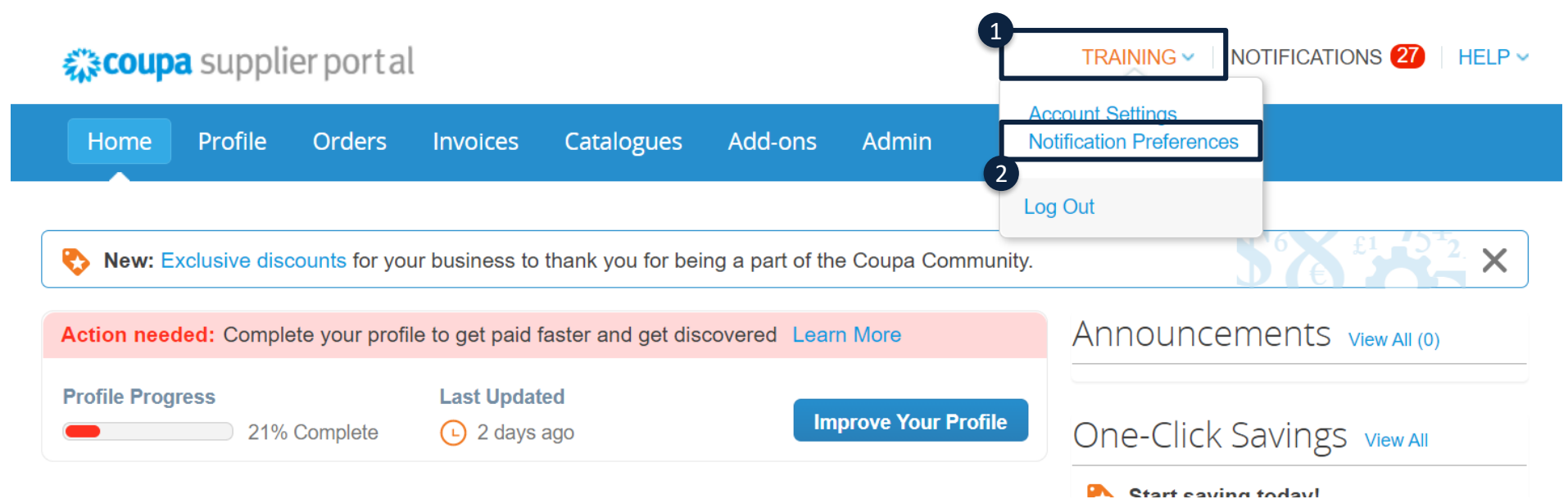
1. Set up notifications

How to set up notifications

To set up your notifications login to the Coupa Supplier Portal (CSP) :

Process Steps:

- 1 To navigate to the notifications preference click on your name drop -down arrow
- 2 **Notification Preferences**
To set up your notifications click on **notification preferences**



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a header with the Coupa logo and the text "coupa supplier portal". Below this is a navigation bar with links: Home, Profile, Orders, Invoices, Catalogues, Add-ons, and Admin. To the right of the navigation bar, there is a user profile section with a dropdown menu. The dropdown menu is open, showing options: TRAINING, Account Settings, Notification Preferences, and Log Out. The "Notification Preferences" option is highlighted. Below the navigation bar, there is a banner for "New: Exclusive discounts for your business to thank you for being a part of the Coupa Community." Below the banner, there is a section titled "Action needed: Complete your profile to get paid faster and get discovered" with a "Learn More" link. Below this, there is a "Profile Progress" section showing a progress bar at 21% Complete and a "Last Updated" section showing "2 days ago". To the right of the profile progress, there is a button labeled "Improve Your Profile". On the right side of the page, there are sections for "Announcements" and "One-Click Savings".

To set up your notifications login to the Coupa Supplier Portal (CSP) :

Process Steps:

NOTE : Select your preferred notification method by checking and unchecking to receive notifications via email, sms or online

My Account Notification Preferences

Settings

Notification
Preferences

Security & Two-
Factor
Authentication

You will start receiving notifications when your customers enable them.

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
-----------------------------------	--	--------------------------------	------------------------------

Catalogues

New comment received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS



HOW TO RECEIVE AND ACKNOWLEDGE POs ON THE CSP

Description

This course explains the process of receiving and acknowledging Purchase Orders (POs).

Objectives

After completing this course, you will be able to:

1. Navigate notifications received from Distell on the Coupa Supplier Portal (CSP)
2. View your POs
3. Acknowledge a PO
4. Communicate with Distell via the comments section on Coupa

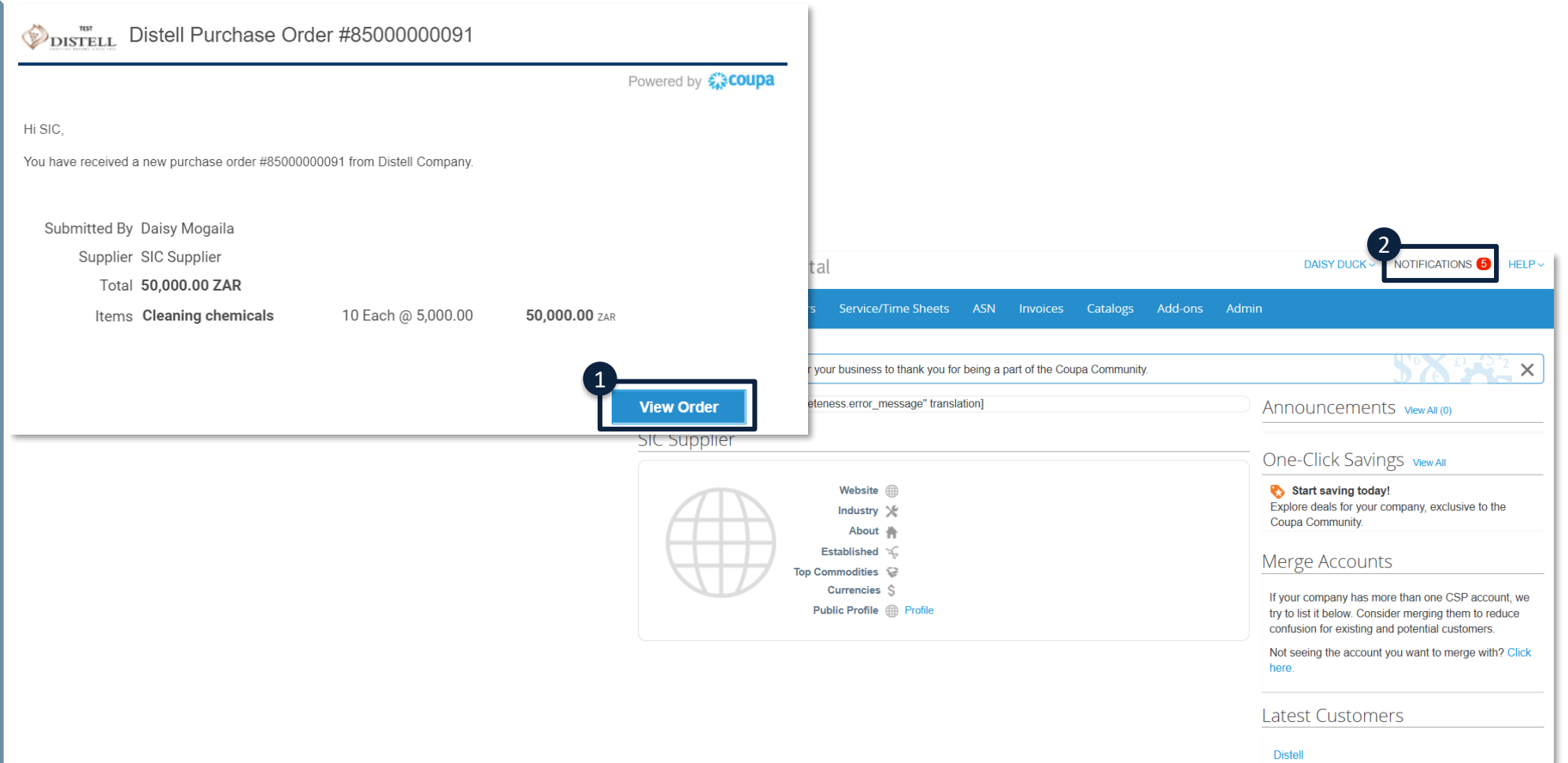
Purchase Orders: CSP Notification

The supplier will receive a Purchase Order (PO) both an email notification and a notification in the CSP.

Process Steps:

- 1 You will receive an email notification of a new purchase order from Distell.
 - 2 You will also receive a notification on the Coupa Supplier Portal (CSP).
- Click on the **'View Order'** button which will log you into the CSP.
- Click on the **'Notifications'** button to open up your notifications.


NOTE : You will receive / have access to the POs received from Distell if you have been assigned the necessary permissions by your Admin User (i.e.: the PO will go to the person responsible for handling Distell orders).



The screenshot displays the Coupa Supplier Portal interface. At the top, it shows the Distell logo and the purchase order number #85000000091. Below this, a message states: "Hi SIC, You have received a new purchase order #85000000091 from Distell Company." The order details include: Submitted By Daisy Mogaila, Supplier SIC Supplier, Total 50,000.00 ZAR, and Items Cleaning chemicals (10 Each @ 5,000.00). A blue button labeled "View Order" is highlighted with a red circle and the number 1. The right sidebar shows the user's name (DAISY DUCK) and a "NOTIFICATIONS" button with a red circle and the number 2. The bottom section of the sidebar lists various links: Website, Industry, About, Established, Top Commodities, Currencies, Public Profile, and Profile.

Process Steps:

3 Once your notifications have opened, you will find your PO on your list of notifications.



DAISY DUCK | NOTIFICATIONS 5 | HELP

HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsAdd-onsAdmin

My Notifications

Notification Preferences

ViewAll

	Message	Received
<input type="checkbox"/>	You are now connected to Distell	07/10/20 08:30 AM
<input type="checkbox"/>	Complete Your Profile to Get Paid Faster and Get Discovered	07/10/20 12:00 AM
<input type="checkbox"/>	New PO 85000000091 for R50,000.00 issued by Distell.	07/09/20 11:53 AM
<input type="checkbox"/>	New PO 85000000090 for R100,000.00 issued by Distell.	07/09/20 09:40 AM
<input type="checkbox"/>	Update your profile for Distell	07/07/20 11:52 AM

Delete


Mark as Read

Purchase Orders: Accessing Orders

To access your orders from the CSP home page:

Navigation:

- 1 To view your orders., on the CSP Home page navigate to the 'Orders' tab.
- 2 Make sure that you are on the 'Orders' sub-tab to view a summary of your purchase orders .

 supplier portal DAISY DUCK ▾ | NOTIFICATIONS 5 | HELP ▾

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

Orders Order Lines Returns Order Changes Order Line Changes Shipments


Select Customer Distell - SIC Supplier ▾





Configure PO Delivery

Purchase Orders

Instructions From Customer

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

Click the  Action to Invoice from a Purchase Order

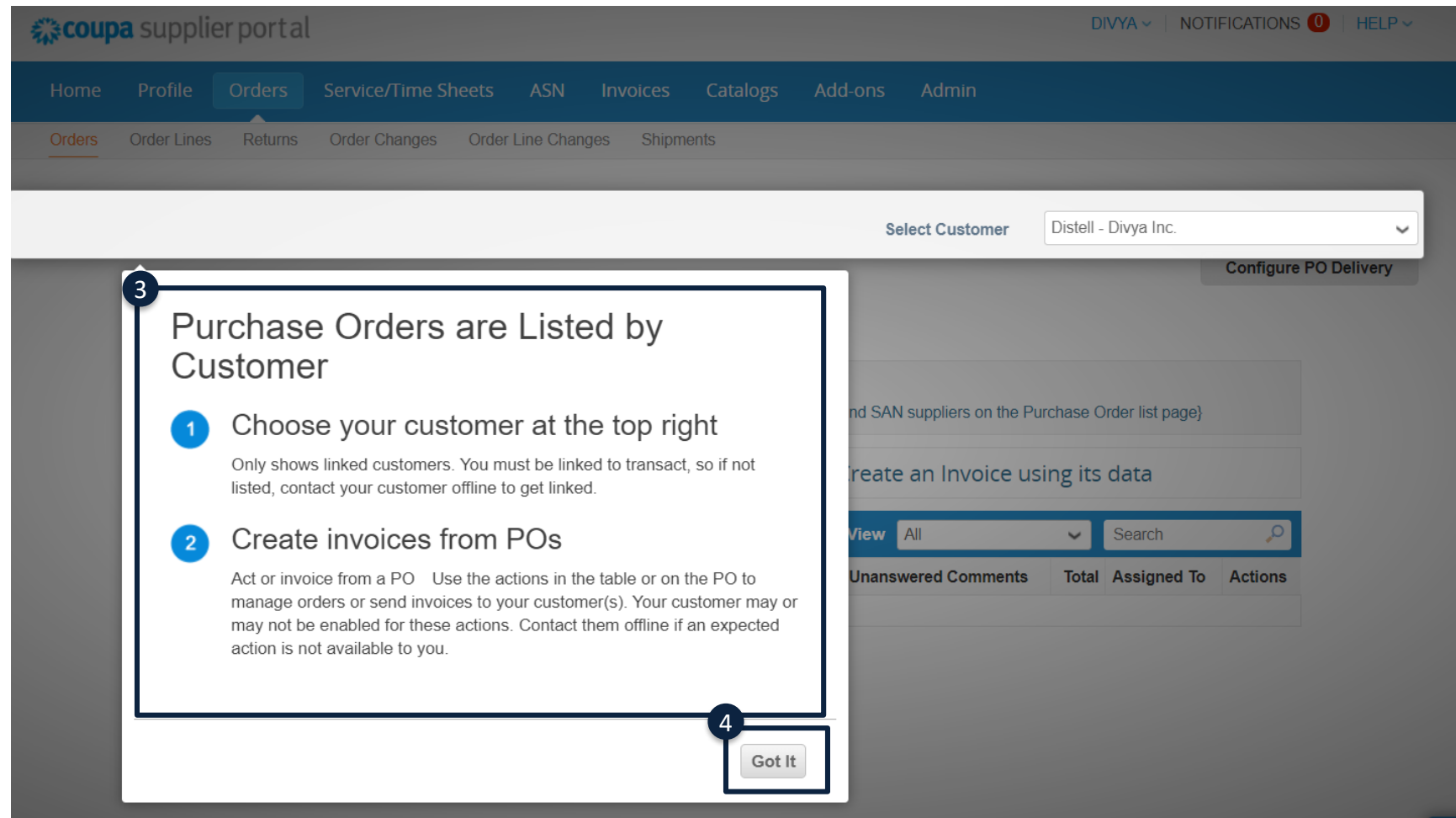
View									All	Search
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions		
85000000091	07/09/20	Issued	None	10 Each of Cleaning chemicals	No	50,000.00 ZAR		 		
85000000090	07/09/20	Issued	None	10 Each of Cleaning chemicals	No	100,000.00 ZAR		 		

Purchase Orders: Accessing Orders

You will be greeted with the message below when you access the 'Orders' tab for the first time.

Navigation:

- 3 Read through the greeting message that displays when you access the 'Orders' tab.
- 4 Click on 'Got It' when you are done reading.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a header with the Coupa logo and 'supplier portal'. On the right, it says 'DIVYA' with a dropdown arrow, 'NOTIFICATIONS 0', and 'HELP' with a dropdown arrow. Below this is a navigation bar with tabs: Home, Profile, Orders (highlighted), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Under the 'Orders' tab, there's a sub-navigation bar with links: Orders (highlighted), Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. In the main content area, there's a 'Select Customer' dropdown menu showing 'Distell - Divya Inc.' and a 'Configure PO Delivery' button. A large white box with a dark border contains a greeting message. The message has a title 'Purchase Orders are Listed by Customer' and two numbered steps. Step 1 is 'Choose your customer at the top right' with a subtext: 'Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.' Step 2 is 'Create invoices from POs' with a subtext: 'Act or invoice from a PO Use the actions in the table or on the PO to manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected action is not available to you.' At the bottom right of the white box is a 'Got It' button.

Purchase Orders are Listed by Customer

- 1 **Choose your customer at the top right**
Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.
- 2 **Create invoices from POs**
Act or invoice from a PO Use the actions in the table or on the PO to manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected action is not available to you.

Got It

Purchase Orders: Accessing Orders

Click on the PO number to open the order

Navigation:

- 5 To acknowledge the Purchase order check the 'Acknowledged' box
- 6 Once the box has been checked you will receive a pop-up that your PO has been acknowledged
- 7 'Assigned to' will contain the email address of the Coupa supplier portal users that have been assigned the Restricted Access to Orders and Restricted Access to Service/Time Sheets permissions. These internal users are also able to view the PO.

NOTE : Acknowledge PO simply notifies the Customer contact that you have come in contact with / received the Purchase Order

Purchase Order #85000000091

Status Issued - Sent via Email
Order Date 07/09/20
Revision Date 07/09/20
Requester Daisy Mogaila
Email dmogaila@deloitte.co.za
Payment Term None
Attachments None

5 Acknowledged ☐

7 Assigned to

Shipping

Ship-To Address 860070 3 Howick Close, 7th Floor, The Edge Building
Bellville
WC
7530
South Africa

Shipment Tracking

No shipment tracking.

Select Customer Distell - SIC Supplier

coupa supplier portal DAISY DUCK NOTIFICATIONS 5 HELP

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

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer Distell - SIC Supplier

Purchase Order #85000000091

6 Order acknowledged

Status Issued - Sent via Email
Order Date 07/09/20
Revision Date 07/09/20
Requester Daisy Mogaila
Email dmogaila@deloitte.co.za
Payment Term None
Attachments None
Acknowledged ☒
Assigned to

Shipping

Ship-To Address 860070 3 Howick Close, 7th Floor, The Edge Building
Bellville
WC
7530
South Africa
Location Code: 0031
Attn: Daisy Mogaila

Terms None

Shipment Tracking

No shipment tracking.

The 'Lines' section will contain all the line item details in the PO.

Navigation:

- 1

The 'QTY' shows the amount of a specific item that is required.
- 2

The 'Price' shows the unit cost per item.
- 3

The 'Invoiced' section shows you what amount / value of goods you have invoiced the customer for against the specific PO.


Lines


Advanced

Search

Sort by

Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		CHANNEL, 100MM X 50MM X 6 M,	100	Each	737.19	73,719.00	0.00
<div><div>Need By</div><div>Part Number</div><div>08/10/19</div><div>9154</div></div>							

2	Type	Item	Qty	Unit	Price	Total	Invoiced
		CHANNEL, 300MM X 100MM X 6 M,	50	Each	2,934.75	146,737.50	0.00
<div><div>Need By</div><div>Part Number</div><div>08/10/19</div><div>9166</div></div>							

Per page

15

45

90

If you have questions for the Distell internal team regarding the Purchase Order make use of the comments sections.

Navigation:

- 1 The **'Enter Comment'** box allows you to communicate with Distell.
- 2 The **'Add comment'** button allows you to send the text / questions typed in the box to the creator of the PO.



The screenshot displays the 'Create Invoice' page in the Rainmaker system. At the top right, there are three buttons: 'Create Invoice', 'Save', and 'Print View'. Below these, the 'Comment' section is visible, featuring a text input field labeled 'Enter Comment' and an 'Add Comment' button. The input field is highlighted with a blue border and a circled '1', while the 'Add Comment' button is highlighted with a blue border and a circled '2'.



TOGETHER
TOWARDS
TOMORROW

» » HOW TO INVOICE ON THE CSP

Description

This course explains the process of creating an invoice on the Coupa Supplier Portal (CSP).

Objectives

After completing this course, you will be able to:

1. Create an invoice
2. Add a remit-to address on the CSP
3. Populate an invoice
4. Submit an invoice
5. Partially invoice on the CSP
6. Send comments to Distell
7. Understand invoice statuses

Access the Orders tab, on the CSP home page, to view purchase orders received from Distell


Process Steps:

- 1

Orders
Provides a view of POs (Purchase orders) received from customers.
- 2

Create Invoice (Gold coins)
To create an invoice click on the stack of gold coins.
- 3

Create Credit Note (Red coins)
To create a credit note for a created invoice click on the stack of red coins.

 supplier portal

DAISY DUCK | NOTIFICATIONS 3 | HELP

HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsAdd-onsAdmin

OrdersOrder LinesReturnsOrder ChangesOrder Line ChangesShipments


Select Customer



Distell

Configure PO Delivery

Purchase Orders

Instructions From Customer
{Purchase Order - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
85000000091	07/09/20	Issued	None	10 Each of Cleaning chemicals	No	50,000.00 ZAR		<div><div></div><div></div></div>

How to Invoice

If you do not have a remit to address set up against your CSP profile, Coupa will prompt you to create one prior to sending an invoice.

Process Steps:

- 1 Add new**
Click 'Add New' to add a remit-to address.

This will pop-up if you have not completed the request to update your information from Distell
- 2 Legal entity name**
Populate the official name of your business registered with the local government.
- 3 Invoice address**
Populate the address of your legal entity.
- 4 Banking details**
Populate banking information. Ensure the banking details is aligned to the banking details in Distell's ERP system

NOTE : Select "Routing number" on the bank Routing number drop down and populate your universal bank code in the box

Choose Invoicing Details

* Legal Entity

Select

1 + Add New

* Remit-To

Select

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

2

* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the

3

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country

South Africa

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

☒ Use this address for Remit-To

☒ Use this for Ship From address

* Payment Type

Bank Account

Banking information

4

Bank Account Country:

Bank Account Currency:

* Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

Bank Code

* Account Number:

Confirm Account Number:

IBAN:

SWIFT/BIC Code:

Bank Account Type:

Business

19

How to Invoice

You are able to generate invoices from this section of the CSP.

Process Steps:

- 1

Invoicing terms of use
Accept the invoicing terms of use by clicking on 'I agree'.

If you do not agree you will not be able to send invoices to Distell.
- 2

Invoice
Populate the invoice number generated by your finance system.
- 3

Invoice date
Populate the date the invoice was created.
- 4

Image Scan
Attach the credit note created in your finance system.

Our compliant invoicing Terms of Use have been revised.
Please confirm that you have read and agree to the current [Terms of Use](#).
If you do not agree, you will not be able to send invoices to Coupa compliant customers.

1

I Accept

Configure PO Delivery

Create Invoice

Create

General Info

2

* Invoice #

3

* Invoice Date

2020/09/23

Payment Term

V001

* Currency

NAD

Status

Draft

4

Image Scan

Browse...

Supplier Note

Attachments

Add

File

URL

Text

From

* Supplier

Namibia Beverages

Supplier VAT ID

094837384688

* Invoice-From Address

Namibia beverages
4 Solingen street
Windhoek, Namibia 10005
Namibia

* Remit-To Address

Namibia beverages
4 Solingen street
Windhoek, Namibia 10005
Namibia

Bank Name:

Standard Bank

Beneficiary Name:

Namibia Beverages

Bank Account Number:

*****3456

Routing Number/Sort Code:

678904325

20


How to Invoice


You are able to generate invoices from this section of the CSP.

Process Steps:

- 5 Supplier Note**
You can use the textbox to send a note to Distell, this note will be visible to the creator of the PO as well as the Accounts Payable team.
- 6 Attachments**
Attach any supporting documents e.g. Delivery note.


Create Invoice Create

 General Info

 From

* Invoice #


* Invoice Date

2020/09/23 

Payment Term

V001

* Currency

NAD 

Status

Draft

Image Scan

Browse...

5 Supplier Note


6 Attachments

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

* Supplier

Namibia Beverages

Supplier VAT ID

094837384688 

* Invoice-From Address

Namibia beverages
 4 Solingen street
 Windhoek, Namibia 10005
 Namibia

* Remit-To Address

Namibia beverages
 4 Solingen street
 Windhoek, Namibia 10005
 Namibia

Bank Name:

Standard Bank

Beneficiary Name:

Namibia Beverages

Bank Account Number:

*****3456

Routing Number/Sort Code:

678904325

How to Invoice

You are able to generate invoices from this section of the CSP

Process Steps:

- 7

Qty
Populate the quantity you are invoicing for.
- 8

Price
Populate the price you are invoicing for.
- 9

VAT rate
Populate the VAT rate.
- 10


Delete : Deletes the invoice.
Cancel : Cancels the invoice.
Save as draft : Saves the invoice as a draft.
Calculate : calculates the total amount / value of the invoice. Click on '**Calculate**' for the total including VAT.
- 11

Submit
Submits the invoice to Distell.

Lines

7

Type



Description

Cleaning chemicals

7

Qty

10


UOM

Each

8

Price

5,000.00

50,000.00 

PO Line

85000000091-1

Contract

Supplier Part Number

Billing Notes

Billing

K-N/A-N/A-N/A-N/A-525AAUA-241000


Taxes

9

VAT Rate

VAT Amount

Tax Reference

 Add Tag

10

Delete

Cancel

Save as Draft

Calculate

11

Submit



TOGETHER
TOWARDS
TOMORROW

HOW TO PARTIALLY INVOICE

How to Partially Invoice

Coupa allows for partial invoicing

Process Steps:



1 Qty and Amount
Clicking on create invoice from a purchase order will generate an invoice with the pre-populated **Qty** and **'amount'** from the purchase order.


2 Qty Change
Click on the **'Qty'** box to change the Qty.

NOTE : If you have not delivered the full QTY on the PO you change the quantity to what was delivered/rendered .

3 Total
Click on **'Calculate'** to update the total amount .



Lines


Type	Description	Qty	UOM	Price	
	Cleaning chemicals	10	Each	5,000.00	50,000.00 

PO Line 85000000091-1 Contract  Supplier Part Number Billing Notes

Billing K-N/A-N/A-N/A-N/A-525AAUA-241000

Lines

Type	Description	Qty	UOM	Price	
	Cleaning chemicals	5	Each	5,000.00	25,000.00 

PO Line 85000000091-1 Contract  Supplier Part Number Billing Notes

Billing K-N/A-N/A-N/A-N/A-525AAUA-241000

How to Partially Invoice


You can partially invoice a purchase order with multiple lines by following the steps below


Process Steps:


1 Create Invoice
Click on the gold stack of coins to create an invoice.


2 Delete lines
Click on the red cross to delete an invoice line you have not yet rendered services / goods for. You will be able to invoice for these items at a later stage if they are yet to be delivered.


NOTE : Partial invoicing would include scenarios where partial goods and services have been delivered /rendered and upfront deposits

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
85000000100	08/13/20	Issued	None	1 Each of New Savanna promo event 1 Each of Promotion event furniture	No	12,000.00 ZAR		 1


2 


Type	Description	Qty	UOM	Price	
	New Savanna promo	1	Each	2,000.00	2,000.00



PO Line 85000000100-1 Contract  Supplier Part Number Billing Notes


Billing K-N/A-N/A-N/A-N/A-201ALSW-14020

Taxes

VAT Rate	VAT Amount	Tax Reference
	<input type="text"/>	<input type="text"/>

 Add Tag

Type	Description	Qty	UOM	Price	
	Promotion event furni	1	Each	10,000.00	10,000.00 

PO Line 85000000100-2 Contract  Supplier Part Number Billing Notes



TOGETHER
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INVOICING FROM THE INVOICES TAB

Alternatively you can create an invoice from the invoice tab on the CSP


Process Steps:

- 1

Invoices
Click on the Invoices tab to create an invoice
- 2

Create invoice from PO
This option allows you to create an invoice
- 3

Purchase orders
The create invoice from PO option will reroute you to the purchase order tab to create an invoice from one of the purchase orders.

 supplier portal

DAISY DUCK | NOTIFICATIONS 21 | HELP

Home | Profile | Orders | Service/Time Sheets | ASN | **Invoices** | Catalogues | Business Performance | Add-ons

Admin

Invoices | Payment Receipts

Select Customer Distell - SIC Supplier

Invoices

Instructions From Customer

{Invoice - 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 BI

Purchase Orders

Instructions From Customer

{Purchase Order - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice 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
8000000102	2020/09/06	Issued	2020/09/06	1 Each of New Savanna promo event 1 Each of Promotion event furniture	No	12 000,00 ZAR		
85000000100	2020/08/13	Issued	2020/08/26	1 Each of New Savanna promo event 1 Each of Promotion event furniture	No	12 000,00 ZAR		
85000000091	2020/07/09	Issued	2020/07/13	10 Each of Cleaning chemicals	No	50 000,00 ZAR		
85000000090	2020/07/09	Issued	None	10 Each of Cleaning chemicals	No	100 000,00 ZAR		



TOGETHER
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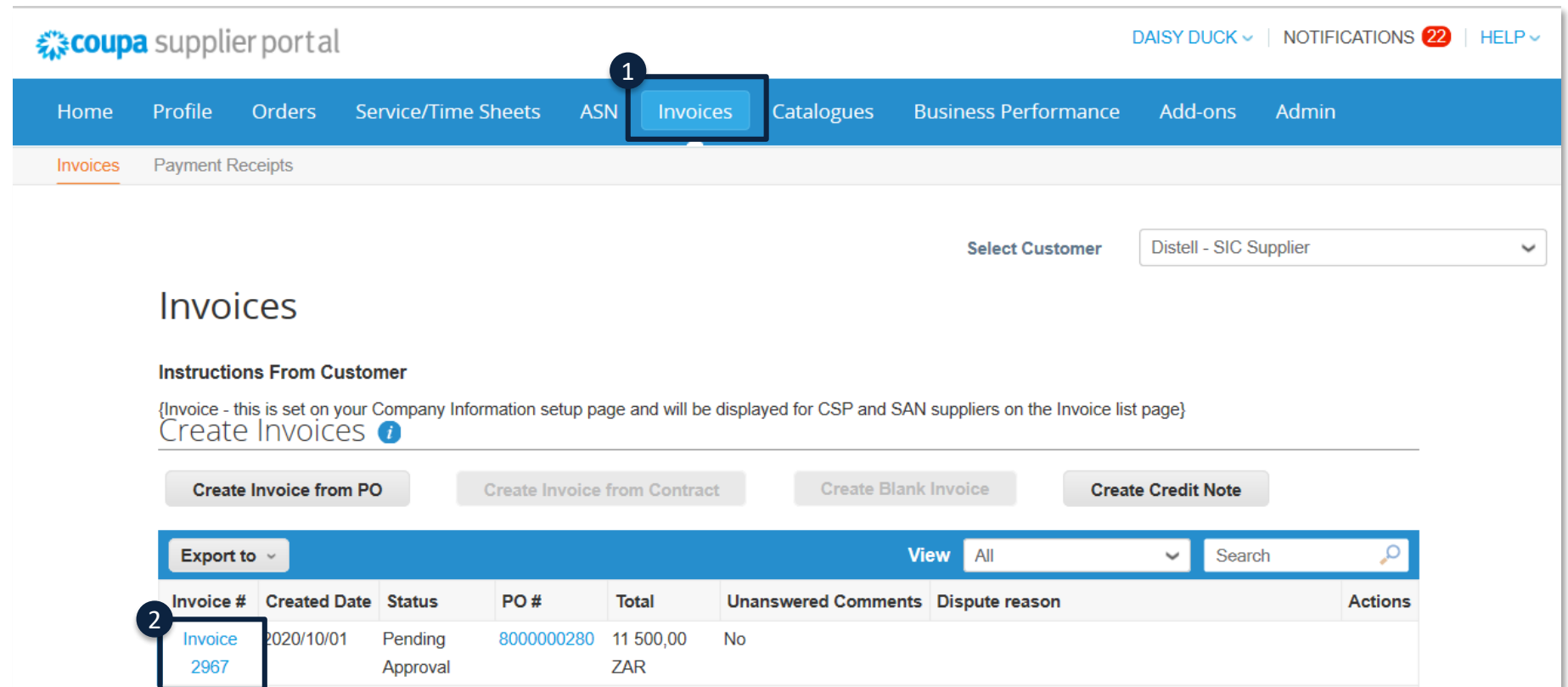
SEND COMMENTS TO
DISTELL

Send comments to Distell

Coupa allows for communication with Distell via the comments section to send notes or enquires

Process Steps:

- Invoices**
To send a comment or enquire about an invoice click on the invoice tab
- Click on the 'Invoice number' to open the invoice



coupa supplier portal DAISY DUCK | NOTIFICATIONS 22 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Add-ons Admin


Invoices Payment Receipts

Select Customer Distell - SIC Supplier

Invoices

Instructions From Customer

{Invoice - 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 All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
Invoice 2967	2020/10/01	Pending Approval	8000000280	11 500,00 ZAR	No		

Coupa allows for communication with Distell via the comments section to send notes or enquires

Process Steps:

- 3

Enter Comment
Populate a comment in the textbox
- 2

To send the comment click on 'Add comment'

NOTE : Payment of invoices on Coupa will not be immediate but as per the agreed payment terms between Distell and the supplier

Total Taxes

Lines Net Total			10,000.00
Lines VAT Totals	VAT	15%	1,500.00
Total VAT			1,500.00
Net Total			10,000.00
Gross Total			11,500.00

0

Comments

1

Enter Comment

2

Add Comment



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INVOICE STATUSES

Invoices can have the following statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer. Note : Payment is not immediate ,payment will be made as per agreed payment terms between Distell and Supplier
Disputed	The invoice has been disputed. Invoices with disputed status are invoices with information that your customer does not agree to, needs clarification on, or finds incorrect.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries (for e.g.: Mexico). It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department for due diligence.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.



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HOW TO RESOLVE A DISPUTED INVOICE

Description

This course explains the process of resolving and updating an invoice that has been disputed by your customer.

Objectives

After completing this course, you will be able to:

1. Access a disputed invoice
2. Resolve a dispute by cancelling an invoice
3. Resolve a disputed invoice by adjusting an invoice
4. Understand the different invoice statuses on Coupa

How to Resolve a Disputed Invoice


If the invoice is incorrectly captured e.g. Invoice lines are different from PO lines Distell Accounts payable will Dispute the invoice prompting you to resolve the dispute.

Navigation:


1 You will receive an email notifying you that your invoice has been disputed and the reason for the dispute .

The email notification will be sent to the person who had created the invoice.

2 Click 'View Online' to login to the Coupa Supplier Portal and view the invoice being disputed.


TEST DISTELL

Invoice #Inv 2967 is in dispute

Powered by 

1

Hi,

Invoice Inv 2967 has been disputed by Distell.

Dispute Reason(s)

- One or more of the invoice lines UOM differs from corresponding PO line's UOM

Date: 2020-08-17

Additional Comments: None

This invoice is available on the [Coupa Supplier Portal](#) to view and resolve. Resolving the disputed invoice would mean you are creating a corrected invoice. The corrected invoice can be submitted to Distell for review.

Resolving the disputed invoice links the corrected, and the disputed invoices. Unless you resolve the disputed invoice, Distell can choose to withdraw it from this status.

If you are a supplier using Coupa Invoicing in European countries, please note that to cancel an invoice you must first create and submit a credit note. If the prior invoice is canceled, you can create and submit a new invoice with a different number.

This process is recommended to comply with tax laws across all European countries, so that you do not expose yourself or your customer to any unnecessary risk as the invoice is corrected.

2

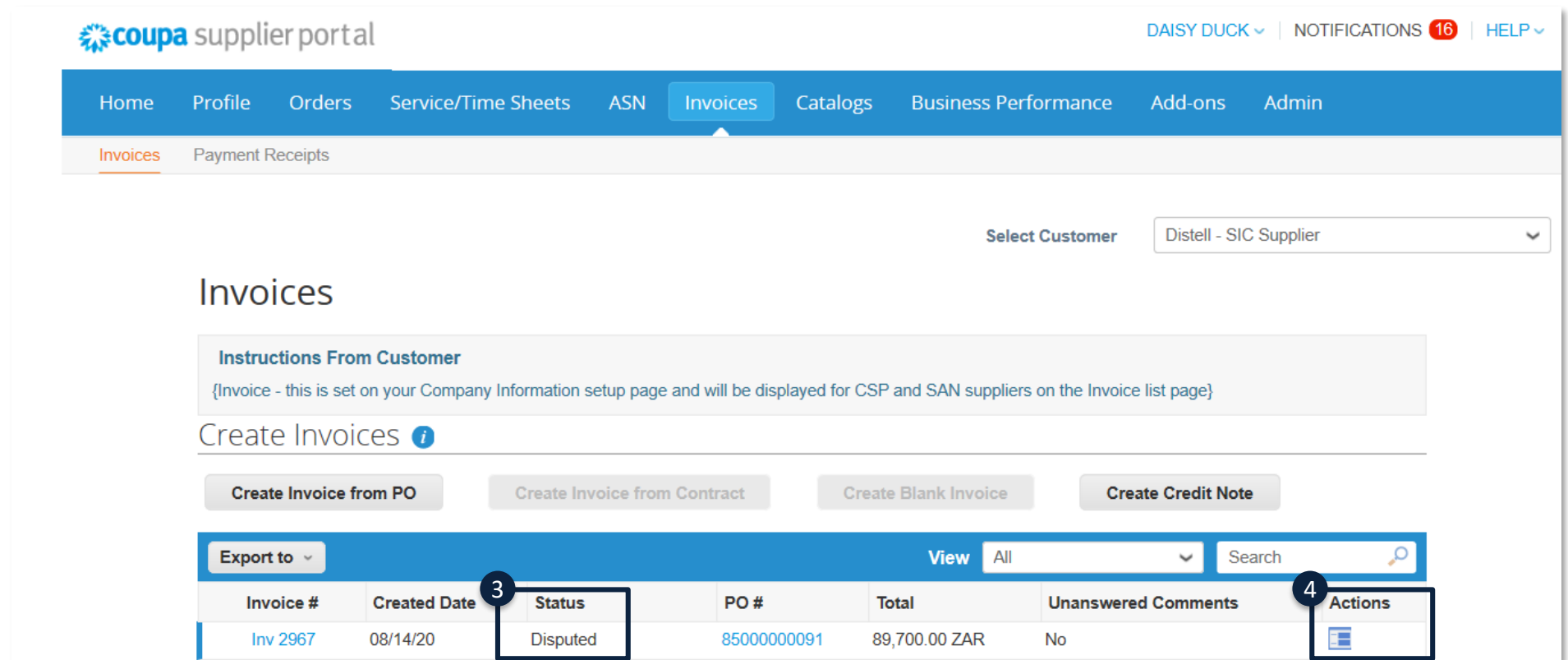
View Online

How to Resolve a Disputed Invoice

Once you have accessed the invoices tab on the CSP follow the below steps to resolve the dispute:

Navigation:

- 3 The status of the invoice will be **'Disputed'**.
You can filter for all your Disputed invoices by changing the View to reflect all Disputed Invoices.
- 4 Click on **'Resolve'**, under **'Actions'** to resolve the disputed invoice.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogs, Business Performance, Add-ons, and Admin. Below this, there's a sub-navigation bar with 'Invoices' and 'Payment Receipts'. On the right, there's a 'Select Customer' dropdown menu showing 'Distell - SIC Supplier'. The main heading is 'Invoices'. Below it, there's a section titled 'Instructions From Customer' with a placeholder text. Underneath, there's a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. At the bottom, there's a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row shows an invoice with ID 'Inv 2967', created on '08/14/20', with a status of 'Disputed', PO # '85000000091', and a total of '89,700.00 ZAR'. The 'Status' column is highlighted with a red box and a red circle with the number 3. The 'Actions' column is highlighted with a red box and a red circle with the number 4.

coupa supplier portal

DAISY DUCK | NOTIFICATIONS 16 | HELP

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

Invoices Payment Receipts

Select Customer Distell - SIC Supplier

Invoices

Instructions From Customer

{Invoice - 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 All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Inv 2967	08/14/20	Disputed	85000000091	89,700.00 ZAR	No	

How to Resolve a Disputed Invoice

There are 2 options to resolve a disputed invoice.

Navigation:

- 5 The 'Cancel invoice' option allows you to resolve the disputed invoice by cancelling it.
- 6 The 'Adjust' option allows you to make adjustments to the invoice e.g. edit the Qty and Amount.

Invoice #Inv 2967 [Back](#)

Select Customer

Distell - SIC Supplier

Please review the invoice and determine the resolution option:

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. We will guide you through a cancellation 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.

Total VAT	11,700.00
Net Total	78,000.00
Gross Total	89,700.00

5

Cancel Invoice

6

Adjust

How to Resolve a Disputed Invoice

Cancelling a disputed invoice:

Navigation:

- 1 To resolve the dispute by cancelling click on 'Cancel Invoice' button.
- 2 Populate the **Credit Note** details to cancel the disputed invoice.
- 3 Once the credit note details have been populated click 'Submit' to send the credit note to Distell Accounts payable.

Totals & Taxes

Lines Net Total			78,000.00
Lines VAT Totals	VAT	15%	11,700.00
<hr/>			
Shipping			0.00
Handling			0.00
Misc			0.00
<hr/>			
Total VAT			11,700.00
Net Total			78,000.00
Gross Total			89,700.00

1 **Cancel Invoice** Adjust

Gross Total -89,700.00


Delete Cancel Save as Draft Calculate 3 **Submit**

Create Credit Note Create


This credit note applies to invoice [Inv 2967](#). When approved, the credit will fully ca


2 General Info

* Credit Note #

* Credit Note Date 08/17/20 

Payment Term

Original Date of Supply 08/13/20 

* Currency  ZAR

Delivery Number


Status Draft

Original Invoice # Inv 2967

Original Invoice Date 08/13/20

Image Scan

Supplier Note

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

* Credit Reason

How to Resolve a Disputed Invoice

Adjusting a disputed invoice:

Navigation:

- 1 To resolve the dispute by adjusting an invoice click on the 'Adjust' button.
- 2 Populate the **Credit Note** details to cancel the disputed invoice .

Totals & Taxes

Lines Net Total		78,000.00
Lines VAT Totals	VAT 15%	11,700.00
<hr/>		
Shipping		0.00
Handling		0.00
Misc		0.00
<hr/>		
Total VAT		11,700.00
Net Total		78,000.00
Gross Total		89,700.00

Cancel Invoice

Adjust

Create Credit Note Create

This credit note applies to invoice [Inv 2967](#). When approved, the credit will fully ca

General Info

* Credit Note #

* Credit Note Date 08/17/20

Payment Term

Original Date of Supply 08/13/20

* Currency

ZAR

Delivery Number

Status Draft

Original Invoice # Inv 2967

Original Invoice Date 08/13/20

Image Scan

Browse...

Supplier Note

Attachments Add File | URL | Text

* Credit Reason

How to Resolve a Disputed Invoice

Adjusting a disputed invoice.

Navigation:

- 1

Select the 'Adjustment type' you want to edit .
If you click on adjustment type (e.g. Quantity) you need to edit the quantity in the QTY box.
- 2

Once you have made the adjustments click on 'Calculate' to update the invoice amount and to cancel the disputed invoice .
- 3



Once the credit note details have been populated click 'Submit' to send the credit note to Distell Accounts Payable.

Lines

Adjustment Type

1


Quantity
Price
Other

Type	Qty	UOM	Price	
 Cleaning chemicals	-12.0	Each	6,500.00	-78,000.00 

PO Line

85000000091-1

Contract



Supplier Part Number

Billing Notes

Billing

K-N/A-N/A-N/A-N/A-525AAUA-241000

Taxes

Delete

Cancel

Save as Draft

2

Calculate

3

Submit



TOGETHER
TOWARDS
TOMORROW

INVOICE STATUSES

Invoices can have the following statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. Invoices with disputed status are invoices with information that your customer does not agree to, needs clarification on, or finds incorrect.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries (for e.g.: Mexico). It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.



TOGETHER
TOWARDS
TOMORROW

CREATING A CREDIT NOTE ON COUPA

Description

This course explains the process of creating a credit note on the Coupa Supplier Portal (CSP).

Objectives

After completing this course, you will be able to:

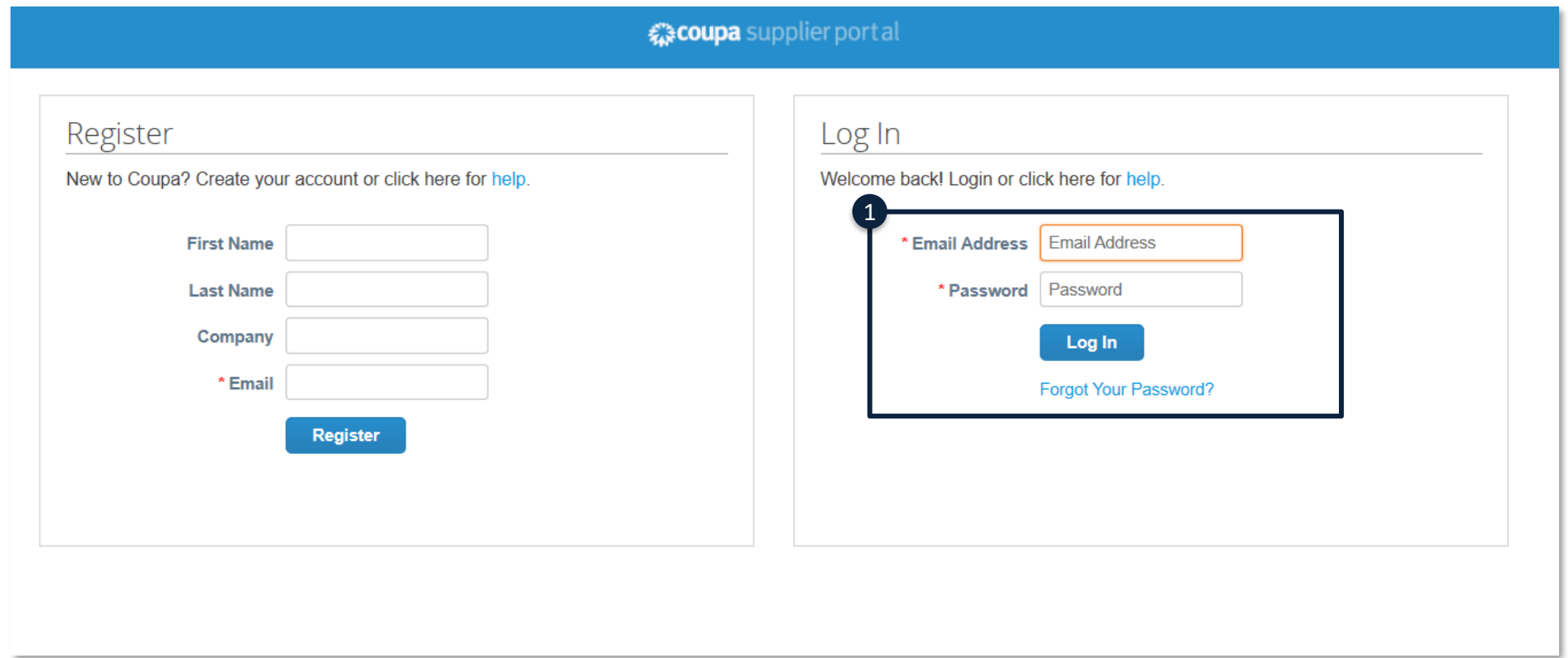
1. Create a credit note
2. Populate a credit note
3. Submit a credit note
4. Send comments to Distell


How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps :

Navigation:

- 1 Log into the CSP by populating your CSP credentials and click on 'Login' to access the portal.



 supplier portal

Register

New to Coupa? Create your account or click here for [help](#).

First Name

Last Name

Company

* Email

[Register](#)

Log In

Welcome back! Login or click here for [help](#).

1

* Email Address

* Password

[Log In](#)

[Forgot Your Password?](#)

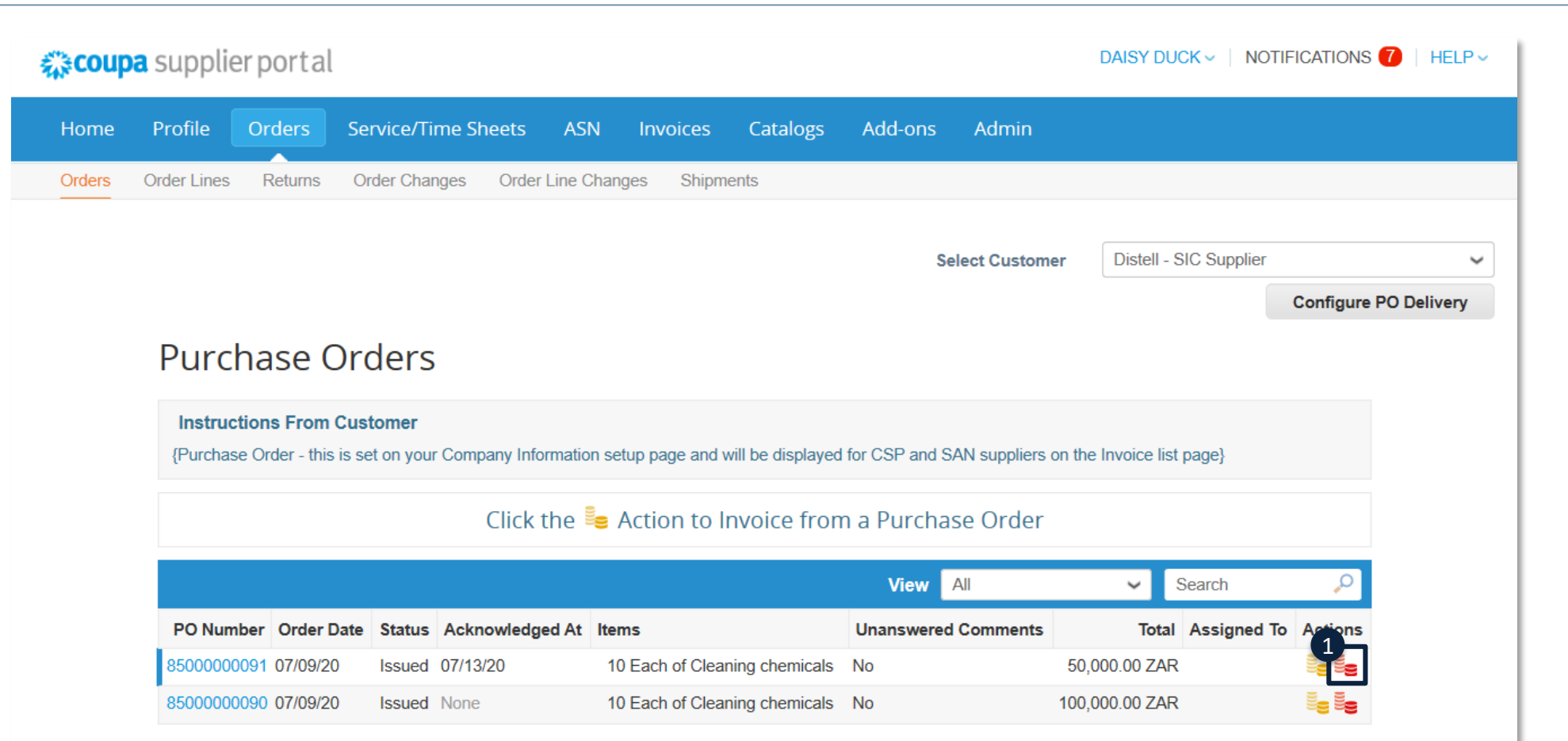
How to Create a Credit Note from a Purchase Order (PO)


Navigate to the Orders tab to create a credit note



Navigation:

1. Navigate to the Orders tab. Under the listed 'Purchase Orders' identify the PO that you would like to create a credit note for. Click on the **red coins** to create a credit note. This will bring up the Credit Note page which you can populate and submit.

NOTE : Of the 2 methods provided, creating a credit note from the PO is the easiest and the most preferred way to create a credit note.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with tabs: Home, Profile, **Orders** (selected), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below this, there's a sub-navigation bar with links: Orders (selected), Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. On the right, there's a 'Select Customer' dropdown menu showing 'Distell - SIC Supplier' and a 'Configure PO Delivery' button. The main heading is 'Purchase Orders'. Below this, there's a section titled 'Instructions From Customer' with a placeholder text: '{Purchase Order - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}'. A callout box says 'Click the  Action to Invoice from a Purchase Order'. At the bottom, there's a table of Purchase Orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table has two rows of data. The first row has a PO Number of 85000000091, Order Date of 07/09/20, Status of Issued, Acknowledged At of 07/13/20, Items of 10 Each of Cleaning chemicals, Unanswered Comments of No, Total of 50,000.00 ZAR, and Assigned To of [blank]. The second row has a PO Number of 85000000090, Order Date of 07/09/20, Status of Issued, Acknowledged At of None, Items of 10 Each of Cleaning chemicals, Unanswered Comments of No, Total of 100,000.00 ZAR, and Assigned To of [blank]. In the Actions column of the first row, there's a red coins icon with a callout box containing the number 1, indicating where to click to create a credit note.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
85000000091	07/09/20	Issued	07/13/20	10 Each of Cleaning chemicals	No	50,000.00 ZAR		
85000000090	07/09/20	Issued	None	10 Each of Cleaning chemicals	No	100,000.00 ZAR		

How to Create a Credit Note from a Purchase Order (PO)

Populate the fields on the Create Credit Note screen:

Navigation:

- 2 **Credit Note**
Populate the credit note number as per your finance system.
- 3 **Credit Note Date**
Reflects the date on which the credit note was created.
- 4 **Original Invoice**
The invoice number of the invoice you are creating a credit note for.
- 5 **Original Invoice date**
The invoice date of the invoice you are creating a credit note for.
- 6 **Image Scan**
Attach the credit note created in your finance system
- 7 **Supplier Note**
You can use the textbox to send a note to Distell, this note will be visible to the creator of the PO as well as the Accounts Payable team.

Select Customer

Distell

Configure PO Delivery

Create Credit Note

Create

General Info

2

* Credit Note #

3

* Credit Note Date

2020/09/23

Payment Term

V001

* Currency

NAD

Status

Draft

4

* Original Invoice #

5

* Original Invoice Date

yyyy/mm/dd

6

Image Scan

Browse...

7

Supplier Note

Attachments

Add

File

|

URL

|

Text

From

* Supplier

Namibia Beverages

Supplier VAT ID

3932387612543267

* Invoice-From Address

Namibia beverages

44 Solingen Street

Windhoek, Namibia 1005

Namibia

* Remit-To Address

Namibia beverages

44 Solingen Street

Windhoek, Namibia 1005

Namibia

* Ship-From Address

Namibia beverages

44 Solingen Street

Windhoek, Namibia 1005

Namibia

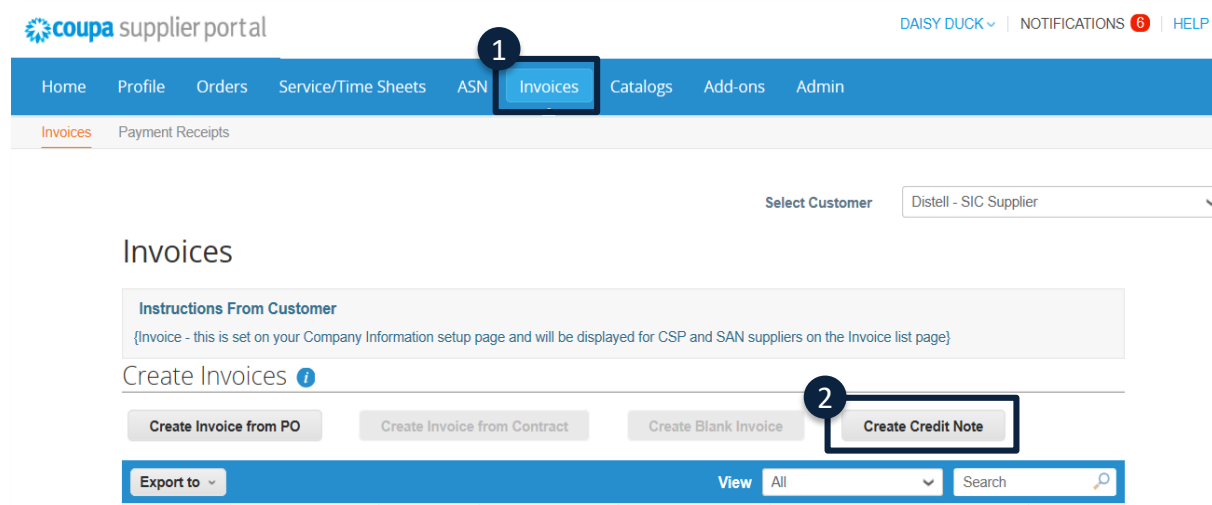
To

How to Create a Credit Note from an Invoice

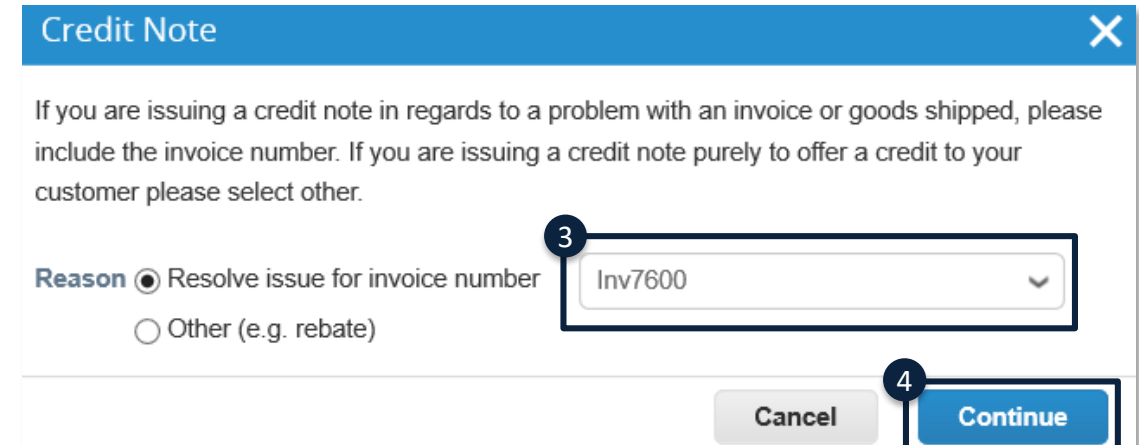
To create a credit note follow the process below

Navigation:

- 1 Navigate to the 'Invoices' tab to create the credit note.
- 2 Click on the 'Create Credit Note' button to create a credit note.
- 3 Once you have clicked on the Create Credit Note button a credit note pop-up will be displayed. Click on the drop-down and select the invoice you are creating a credit note for.
- 4 Click on the 'Continue' button to continue with creating the credit note.



The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a circled 1), Catalogs, Add-ons, and Admin. Below the navigation bar, there's a 'Select Customer' dropdown menu set to 'Distell - SIC Supplier'. The main section is titled 'Invoices' and contains an 'Instructions From Customer' box. Below this is a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and **Create Credit Note** (highlighted with a circled 2). At the bottom of this section are 'Export to' and 'View' dropdowns, and a search bar.



The screenshot shows a 'Credit Note' pop-up form. It has a title bar with a close button (X). The main text reads: '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 is a 'Reason' section with two radio buttons: 'Resolve issue for invoice number' (selected) and 'Other (e.g. rebate)'. To the right of the selected radio button is a dropdown menu (highlighted with a circled 3) showing 'Inv7600'. At the bottom right are 'Cancel' and **Continue** buttons (highlighted with a circled 4).

How to Create a Credit Note from an Invoice

Navigate to the invoices tab to create a credit note

Navigation:

5 Select the applicable option:
Completely cancel the invoice with a credit note:
Use this option to fix any inaccuracies with the invoices by **cancelling** the incorrect invoice

Adjust invoice with a credit note:
Only quantity and price can be reduced through **partial** credit notes

6 Click 'Create' to create the credit note.

7 Populate the 'Credit note number' as per your finance system.

8 **Image Scan**
Attach the credit note created in your finance system

Credit Note

How do you want to correct invoice "Inv7600" ?

☒ Completely cancel the invoice with a credit note *i*

☐ Adjust invoice with a credit note *i*

Cancel

Create

Create Credit Note

Create

This credit note applies to invoice [Inv287](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

Credit Note #

Credit Note Date 2020/09/23

Payment Term V001

Currency NAD

Status Draft

Original Invoice # Inv287

Original Invoice Date 2020/09/23

Image Scan

Supplier Note

Attachments Add File | URL | Text

From

Supplier Namibia Beverages

Supplier VAT ID 3932387612543267

Invoice-From Address Namibia beverages
44 Solingen Street
Windhoek, Namibia 1005
Namibia

Remit-To Address Namibia beverages
44 Solingen Street
Windhoek, Namibia 1005
Namibia

Ship-From Address Namibia beverages
44 Solingen Street
Windhoek, Namibia 1005
Namibia

To

Customer Distell

How to Create a Credit Note from an Invoice

Navigate to the invoices tab to create a credit note

Navigation:

9 Click on 'Submit' to submit the credit note.

10 The credit note will be displayed under the invoice tab with a minus amount in red.

Adjustment Type: Quantity

Type	Description	Qty	UOM	Price	
	Cleaning chemicals	-5	Each	5,000.00	-25,000.00

PO Line: 85000000091-1 Contract: Supplier Part Number: Billing Notes:

Billing: K-NA-NA-NA-NA-525AAUA-241000

Taxes:

VAT Rate	VAT Amount	Tax Reference
15.0%	-3,750.00	

Add Tag

Totals & Taxes:

Lines Net Total	-25,000.00
Lines VAT Totals	-3,750.00
Shipping	0.000
VAT	0.000
Tax Reference	Enter a tax reason description.
Handling	0.000
VAT	0.000
Tax Reference	Enter a tax reason description.
Misc	0.000
VAT	0.000
Tax Reference	Enter a tax reason description.
Total VAT	-3,750.00
Net Total	-25,000.00
Gross Total	-28,750.00

9 Submit

supplier portal

DAISY DUCK | NOTIFICATIONS 7 | HELP

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

Payment Receipts

Select Customer: Distell - SIC Supplier

Invoices

Instructions From Customer
(Invoice - 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 All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
CN7600	07/14/20	Approved	85000000091	-28,750.00 ZAR	No	
Inv7600	07/09/20	Approved	85000000091	28,750.00 ZAR	No	

10



TOGETHER
TOWARDS
TOMORROW

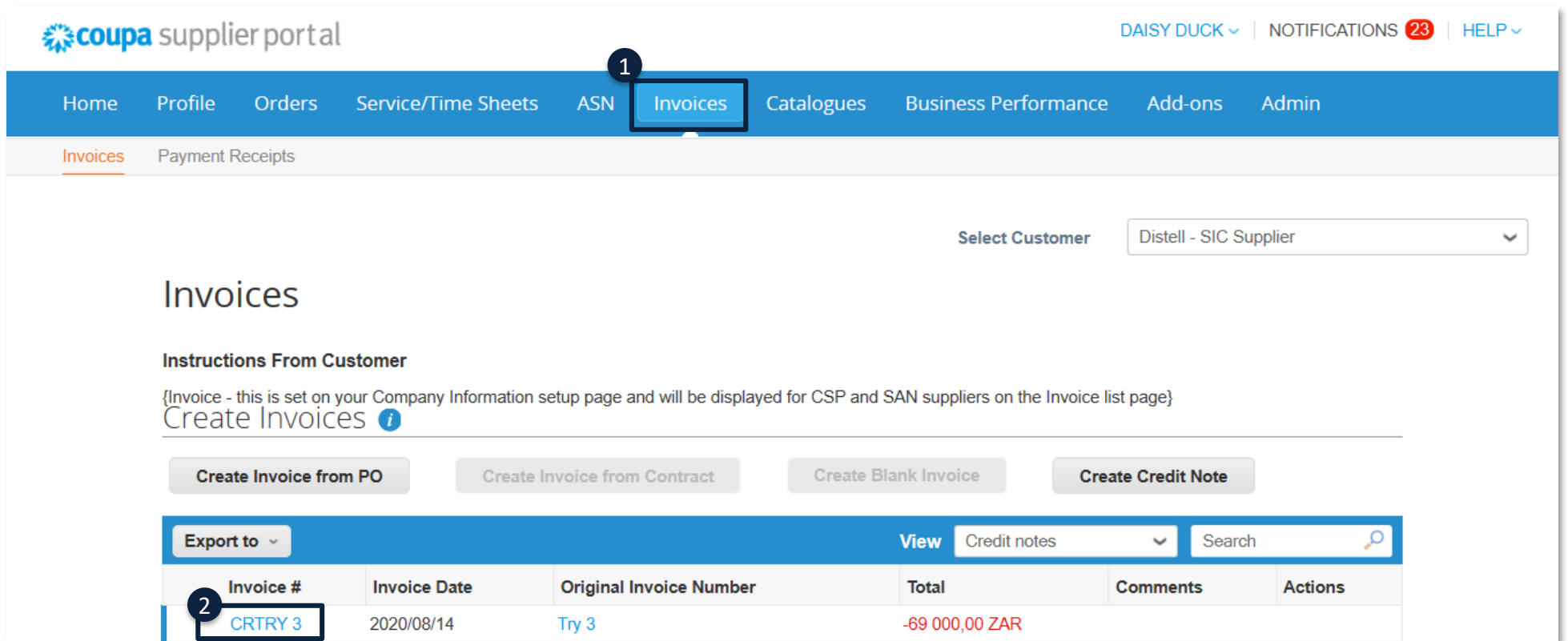
SEND COMMENTS TO
DISTELL

Send comments to Distell

Coupa allows for communication with Distell via the comments section to send notes or enquires

Process Steps:

- 1 Invoices**
To send a comment or enquire about a credit note click on the invoice tab
- 2** Click on the **'credit note'** to open the invoice



coupa supplier portal DAISY DUCK ▾ NOTIFICATIONS **23** HELP ▾

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Add-ons Admin

Invoices Payment Receipts

Select Customer Distell - SIC Supplier ▾

Invoices

Instructions From Customer

{Invoice - 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 Credit notes ▾ Search 🔍

Invoice #	Invoice Date	Original Invoice Number	Total	Comments	Actions
CRTRY 3	2020/08/14	Try 3	-69 000,00 ZAR		

Coupa allows for communication with Distell via the comments section to send notes or enquires

Process Steps:

- 3

Enter Comment
Populate a comment in the textbox
- 2

To send the comment click on 'Add comment'

NOTE : Payment of invoices on Coupa will not be immediate but as per the agreed payment terms between Distell and the supplier

Total Taxes

Lines Net Total			-60,000.00
Lines VAT Totals	VAT	15%	-9,000.00
Total VAT			-9,000.00
Net Total			-60,000.00
Gross Total			-69,000.00

0 Comments

Enter Comment

1

2 Add Comment



TOGETHER
TOWARDS
TOMORROW

»»» **END- THANK YOU**



HOW TO FIX REMIT-TO ADDRESS NOT APPLIED ERROR

Description

This course explains the process of fixing a 'Remit-to Not Applied' error on the Coupa Supplier Portal (CSP).

Objectives

After completing this course, you will be able to:

1. Deactivate a legal entity
2. Add a legal entity

Fixing Remit-to Address Not Applied Error

The following steps need to be followed when you as a supplier create an invoice and a 'Remit-to address not applied' error pops up:

Process Steps:

1. Populate your login credentials to access the CSP.

The screenshot shows the Coupa Supplier Portal interface. At the top is a blue header with the Coupa logo and 'supplier portal'. Below the header are two main sections: 'Register' and 'Log In'.

Register Section:

- Text: 'New to Coupa? Create your account or click here for [help](#).'
- Form fields: 'First Name', 'Last Name', 'Company', and '* Email'.
- Button: 'Register'.

Log In Section:

- Text: 'Welcome back! Login or click here for [help](#).'
- Form fields: '* Email Address' and '* Password'.
- Button: 'Log In'.
- Link: 'Forgot Your Password?'.

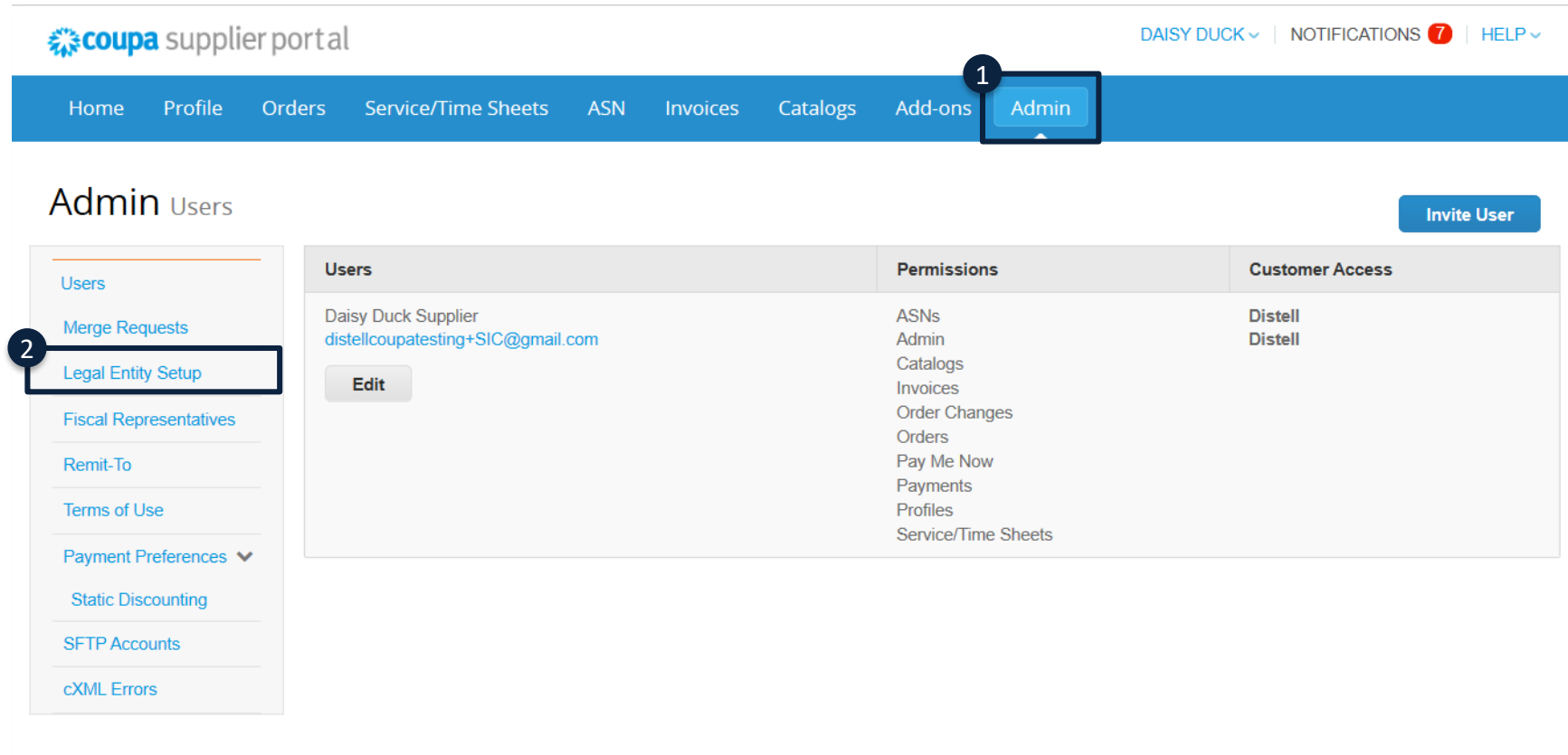
A red box with a red '1' in a circle highlights the 'Log In' section, indicating the first step in the process.

Fixing Remit-to Address Not Applied Error

Access the Admin tab:

Process Steps:

- 1 Once you have accessed the CSP click on the 'Admin' tab.
- 2 Click on 'Legal entity setup' to deactivate the existing entity.



coupa supplier portal

DAISY DUCK ▾ | NOTIFICATIONS 7 | HELP ▾

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

Admin Users

[Invite User](#)

Users	Permissions	Customer Access
Daisy Duck Supplier distellcoupatesting+SIC@gmail.com Edit	ASNs Admin Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets	Distell Distell

Left Sidebar Menu:

- Users
- Merge Requests
- Legal Entity Setup**
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
- Static Discounting
- SFTP Accounts
- cXML Errors


NOTE : Only users with Admin Access will be able to access and amend this. The admin of your portal would be the person that completed the CSP registration for your company

Fixing Remit-to Address Not Applied Error

Deactivate the legal entity:

Process Steps:

- 3
- Click on 'Deactivate legal entity' to deactivate the current remit-to.

 supplier portal

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HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsAdd-onsAdmin

Admin

Legal Entity Setup

Add Legal Entity

Legal Entity			
SIC Support			
Invoice From	Remit-To Accounts	Locations	Customers
145 Waterfall street Midrand 1687 South Africa	<div>Bank Account1 customer</div> <div>Bank NameStandard Bank</div> <div>Beneficiary NameSIC Suppleir</div> <div>Account Number*****7897</div> <div>Transit Code8769</div> <div>Remit-To Address145 Waterfall street Midrand 1687 South Africa</div> <div>Active</div>	145 Waterfall street Midrand 1687 South Africa	Distell

Actions

Manage Legal Entity

Manage Remit-To Accounts

Deactivate Legal Entity

Fixing Remit-to Address Not Applied Error

Click add legal entity

Process Steps:

- 4
- Click on 'Add Legal Entity' to make the current remit-to inactive.
- 5
- Populate your 'Legal Entity Name' and 'Country'.
- 6
- Click on 'Continue' to fill out the rest of your company information.

coupa

supplier portal

DAISY DUCK | NOTIFICATIONS 7 | HELP

Home

Profile

Orders

Service/Time Sheets

ASN

Invoices

Catalogs

Add-ons

Admin

Admin

Legal Entity Setup

Users

Merge Requests

Legal Entity Setup

Fiscal Representatives

Remit-To

Terms of Use

Payment Preferences

Static Discounting

SFTP Accounts

cXML Errors

Legal Entity

Let's get your company setup for electronic invoicing!
We'll walk you through what's needed & keep it as short as possible.

The first thing you'll need to do is add a legal entity.

Please note, if you are a European Company, or have any operations in Europe, and you are base more than one country, you must complete your fiscal representatives before you set up your legal Invoicing Setup to continue.

4

Add Legal Entity

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

5

Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.

6

Continue

Fixing Remit-to Address Not Applied Error

Populate your invoice address and banking details :

Process Steps:

7

Invoice address

Populate the address of your legal entity.

8

Populate your 'Banking Information'.

NOTE : Select "Routing number" on the bank Routing number drop down and populate your universal bank code in the box next to it

What address do you invoice from?

7

* Address Line 1


Address Line 2


* City

State


* Postal Code

Country South Africa

☒ Use this address for Remit-To 

☒ Use this for Ship From address 


REQUIRED FOR INVOICING


Enter the registered address of your legal entity. This is the same location where you receive government documents. 

* Payment Type Bank Account 

Banking information


8


Bank Account Country: South Africa 

Bank Account Currency: 


* Bank Name:


Beneficiary Name:


Routing (Bank Code) Number: Bank Code 

* Account Number: 

Confirm Account Number:

IBAN: 

SWIFT/BIC Code: 

Bank Account Type: Business 

Fixing Remit-to Address Not Applied Error

Apply the remit to address by following the below steps

Process Steps:

- 9 Once the remit to address has been populated, the address will be displayed, click 'Next'.
- 10 Click on 'Done' to apply the new remit to address.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status
Bank Account Standard Bank SIC Support *****6543 6789	174 Fransis baard SIC business park Pretoria 0001 South Africa	Active

Manage

Deactivate Legal Entity

Cancel

9 Next

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status
174 Fransis baard SIC business park Pretoria 0001 South Africa	Active

Manage

Deactivate Legal Entity

10 Done

How to Create a New Remit-to Address

The remit to address will be applied

Process Steps:

- 11

The remit to address has been setup click 'Done'.
- 12

The new remit to address will be displayed under Legal entity setup.

Setup Complete

1234

✓

Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in addition to providing it on the invoice.

Click on the Profile Tab to see if your customer has a form that collects payment information.

Otherwise, you'll have to send it to them through another channel.

Go to Orders

Go to Invoices

Return to Admin

Done

coupa supplier portal

DAISY DUCK | NOTIFICATIONS 7 | HELP

HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsAdd-onsAdmin

Admin Legal Entity Setup

Add Legal Entity

UsersMerge RequestsLegal Entity SetupFiscal RepresentativesRemit-ToTerms of UsePayment PreferencesStatic DiscountingSFTP AccountscXML Errors

Legal Entity

SIC Support

Invoice From	Remit-To Accounts	Locations	Customers
174 Fransis baard SIC business park Pretoria 0001 South Africa	<div>Bank Account1 customer</div> <div>Beneficiary NameSIC Support</div> <div>Account Number*****6543</div> <div>Transit Code6789</div> <div>Remit-To Address174 Fransis baard SIC business park Pretoria 0001 South Africa Active</div>	174 Fransis baard SIC business park Pretoria 0001 South Africa	Distell

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TOGETHER
TOWARDS
TOMORROW

HOW TO LOG A CALL WITH COUPA

Description

This course explains the process of logging a support / help call with Coupa.

Please note that Distell does have an internal support desk for supplier queries - should you require assistance with a non-technical query (described in the course content), you can contact us on suppliers@distell.co.za.

Objectives

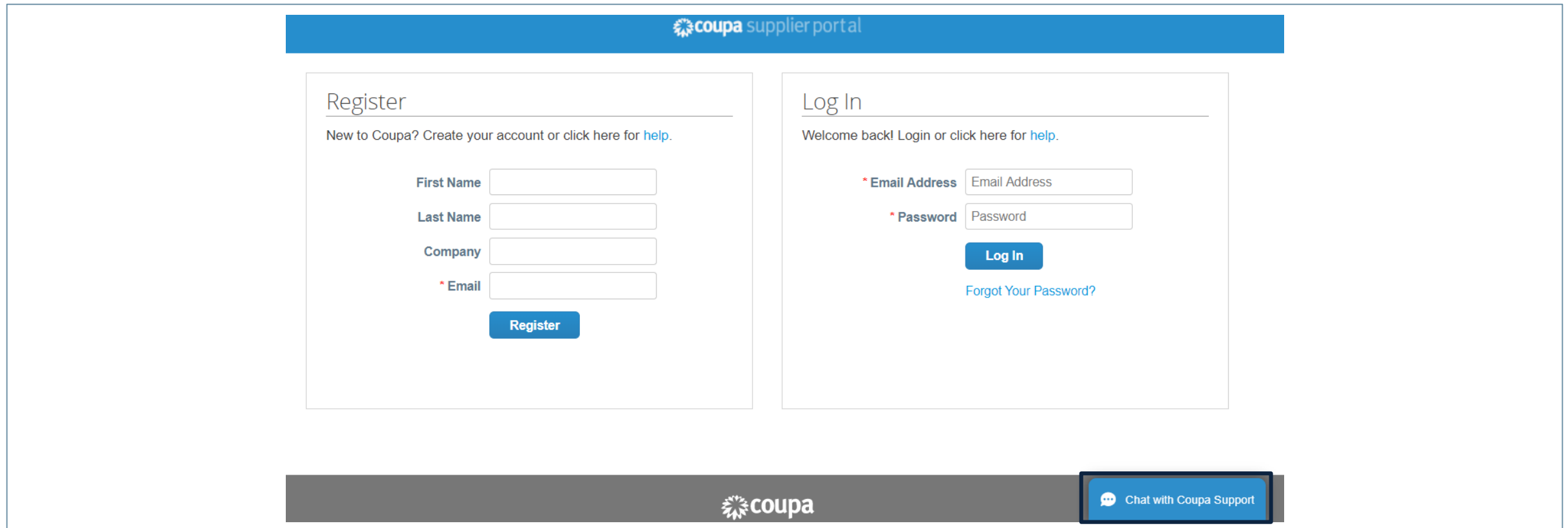
After completing this course, you will be able to:

1. Identify when to log a call with Coupa
2. Log a call with a Coupa support agent

When Can I Log a Call with Coupa?

Distell does not have visibility and access to your Coupa Supplier Portal (CSP), therefore as a Supplier you will need to log a call when:

- You are experiencing technical issues on the CSP
- You have requested password reset emails but are not receiving the requested emails
- You cannot access your portal



The screenshot displays the Coupa Supplier Portal interface. At the top, a blue header bar contains the 'coupa supplier portal' logo. Below this, the page is divided into two main sections: 'Register' on the left and 'Log In' on the right. The 'Register' section includes a link for new users and a form with fields for First Name, Last Name, Company, and Email, followed by a 'Register' button. The 'Log In' section includes a link for returning users and a form with fields for Email Address and Password, followed by a 'Log In' button and a 'Forgot Your Password?' link. At the bottom, a dark grey footer bar features the 'coupa' logo and a 'Chat with Coupa Support' button.

coupa supplier portal

Register
New to Coupa? Create your account or click here for [help](#).

First Name

Last Name

Company

* Email

Register

Log In
Welcome back! Login or click here for [help](#).


* Email Address

* Password

Log In

[Forgot Your Password?](#)

coupa

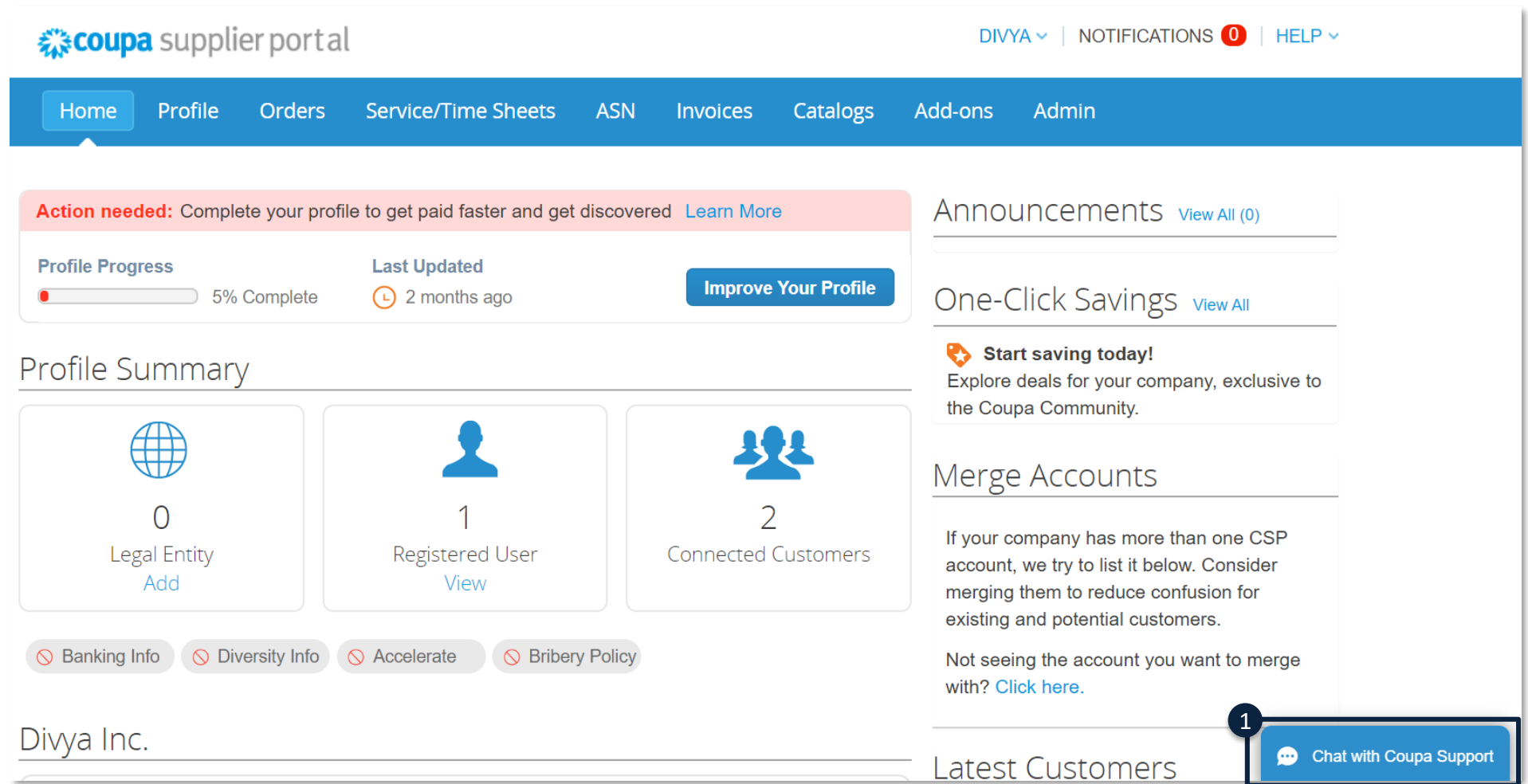
 Chat with Coupa Support

How to Log a Call with Coupa

Below, we have outlined steps you can follow when logging a call with Coupa:

Process Steps:

- 1 Log into the CSP. Once logged into the CSP, scroll to the bottom of the page and click on 'Chat with Coupa Support' button.





The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information: 'DIVYA' with a dropdown arrow, 'NOTIFICATIONS 0', and 'HELP' with a dropdown arrow. Below the header is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area features a red banner with the text 'Action needed: Complete your profile to get paid faster and get discovered' and a 'Learn More' link. Below this is a 'Profile Progress' section showing a 5% complete progress bar and a 'Last Updated' section showing '2 months ago' with a clock icon and an 'Improve Your Profile' button. The 'Profile Summary' section contains three cards: 'Legal Entity' with a globe icon and 'Add' link, 'Registered User' with a person icon and 'View' link, and 'Connected Customers' with a group of people icon. Below these cards are four toggle switches: 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'. The bottom of the page shows the company name 'Divya Inc.' and a 'Latest Customers' section. A blue chat button labeled 'Chat with Coupa Support' is positioned in the bottom right corner, with a '1' in a circle next to it, indicating the first step in the process.

How to Log a Call with Coupa

Populate the mandatory fields:

Process Steps:

- 1 Once you have clicked on 'Chat with Coupa Support' a pop-up will appear. Populate all the mandatory fields on the pop-up.
- 2 Click on 'Start Chat' for assistance from a Coupa agent.


Chat with Coupa Support


This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly.

This chat session will be saved as part of the supplier support request ticket. Continuing with this session will constitute your consent for this action.

1

* First Name

Divya

* Last Name

Pillay

* Email

pretishka@gmail.com

Phone

2

Start Chat



TOGETHER
TOWARDS
TOMORROW

»»» **END- THANK YOU**