



Coupa Supplier Portal (“CSP”) and Supplier Actionable Notification (“SAN”) User Guide

July 7, 2024
Version 1.0



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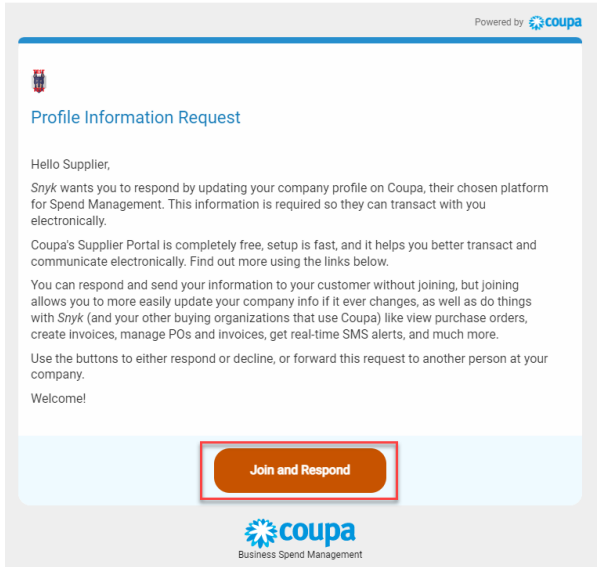
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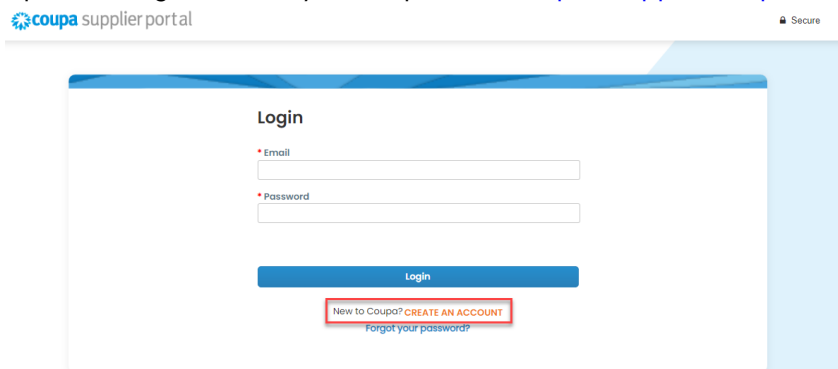
A) Coupa Supplier Portal (“CSP”)

How to register on the portal

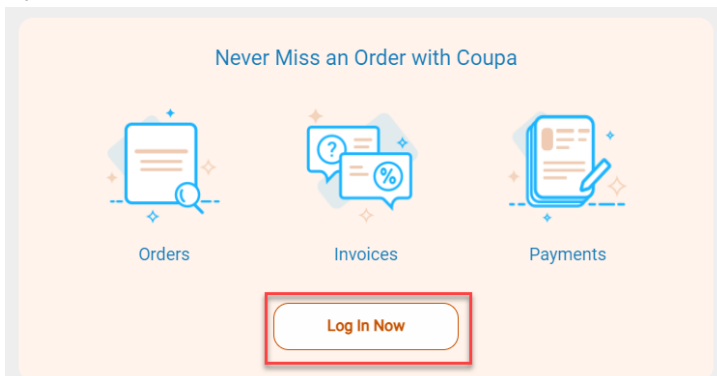
Option 1: Through the email invitation sent by Snyk (**preferred method**):



- Option 2: Register directly on the portal via <https://supplier.coupahost.com/>:



- Option 3: Purchase Order Email:

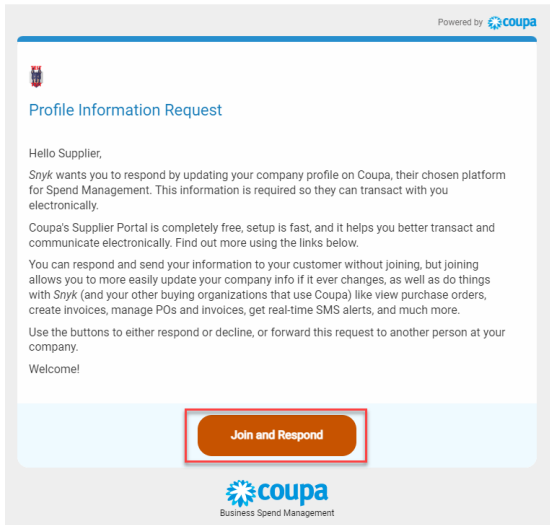


Note: if you decide to register through option 2: directly through portal or option 3: Purchase Order email to finalize your registration your account will have to be linked with Snyk Coupa instance. To do that, please, inform Snyk by sending an email to supplierenablement@snyk.io.

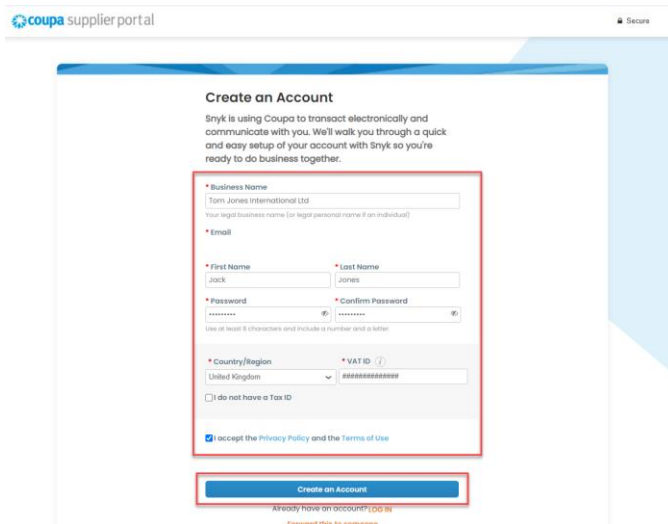
How to create an account.

The following steps cover creating an account by choosing to register via option 1 (Through the email invitation sent by Snyk).

1. Open the email invitation that was sent by Snyk and click on **Join and Respond** button:



2. Complete all required fields shown on the **Create an Account** screen, accept the privacy policy and terms of use and click **Create an Account** button:



3. Complete email verification using the one-time code sent your registered email address and click **Next**:

Email Verification

We sent a one time verification code to chris.siwiek+566@gmail.com

2	8	7	8	0	0
---	---	---	---	---	---

Didn't receive the Verification Code? [Request a New Code](#)

Next

4. Complete your **Contact Info** and click **Next**:

Your Contact Info

* First Name: Jack * Last Name: Jones

Work Phone: Country/Region: Area/City: Local: Extension:

* Business Website: www.google.com
 I do not have a website

* Country/Region of Primary Address: United Kingdom

Next



- 5. Add your primary address under the **Make Sure you Get Paid** section and click **Next**:

Make Sure You Get Paid
Confirm location addresses

Primary

* Country/Region
 United Kingdom

* Address Line 1
 9748 TEST Street

* City * State * Postal Code
 London England SW1P 3JY

* Country/Region * VAT ID ⓘ
 United Kingdom

I do not have a Tax ID [Additional Tax Registration](#)

invite user ⓘ

- 6. At the **Snyk requires some additional information** page, click **Take Me There**:

Snyk requires some additional information
This information must be provided before you can do business with Snyk.

[Skip for Now](#)

- 7. Complete the Supplier Onboarding Form including the critical information marked with a red asterisk *:

Section	Details
State Region	State or Region of your primary address (this will drive an ISO Code automatically)
PO Email	Email address you would like to receive Snyk PO's to.
Tax Registration	Country and tax number
Is the Company Registered in the US?	If yes, please upload and attach a W8 or W9
Remit-to Information	Preferred method of Payment and ensure you click "Add Remit-To" and follows steps to add a Legal entity.
Banking Information	Banking details of where and how you wish to get paid.
Bank Letter Head	Please attach a bank account document / letter head that matches your submitted banking details above.



Click **Submit for Approval**:

Internal Use Only

Primary Subsidiary
Snyk UK

Decline

Save

Submit for Approval

Note: Coupa will verify the information submitted and if any issues, will let you know in red.

Optional: If you wish you can save the information to your profile for future use with other Coupa c customers:

[Save This Information to Your Profile?](#)

X

Save this info to your profile so that you'll be able to re-use it when other customers request you the same information.

The following info will be saved to your profile:

- PO Email
- Preferred Currency
- Primary Address
- Address Line 2
- State

[Learn More](#)

Not Now

Yes, Save to Profile

Your profile request will now be reviewed by Snyk and you will be kept updated on email including when the profile is approved and you are officially onboarded.

How to log into the CSP

To login to the CSP one you have registered, go to <https://supplier.coupahost.com/>, input your email and password and click **Login**:

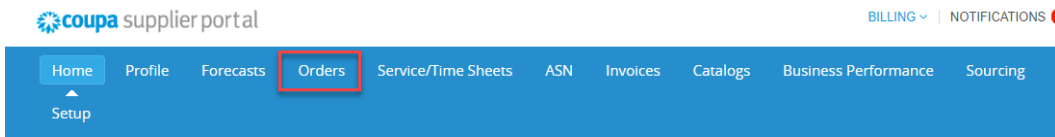
The screenshot shows a login form with the following elements:

- Title:** Login
- Email Field:** Labeled "Email" with a red asterisk, containing the text "xxxxxx".
- Password Field:** Labeled "Password" with a red asterisk, containing a series of dots.
- Login Button:** A blue button with the text "Login".
- Footer Links:** "New to Coupa? [CREATE AN ACCOUNT](#)" and "[Forgot your password?](#)".



How to create an invoice

1. Choose **Orders** tab at the top



Note: You can also choose **Create Invoice from PO** button from the **Invoice** tab to be taken to the same screen.

2. Click on the **Create Invoice** (📄) icon for the PO in the Actions column of the Purchase Orders table.

Purchase Orders

Instructions From Customer

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

Click the 📄 Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
SNYK-569	07/02/24	Issued	None	1 Each of TEST	No	2,500.00 GBP		

Note: You can also open the PO and click **Create Invoice** button to perform the same action.

3. On the **Create Invoice** page, complete all mandatory information (marked with a red asterisk *) at the header level including **Invoice #**, **Supplier Note**, and **Buyer VAT ID** if required.

Create Invoice Create

General Info F

* Invoice # ✓

* Invoice Date

Payment Term NET30 * Invoice

* Date of Supply

* Currency

Delivery Number

Status Draft * R

Image Scan Invoice.pdf

* Supplier Note

Attachments Add File | URL | Text Br

Discount Amount Bank A

Cash Accounting Scheme

Margin Scheme * Shi

Note:

- Some information will be prepopulated from your profile
- It is highly recommended that you attach a pdf version of your invoice
 - Please make sure that the pdf copy is consistent with the Coupa electronic one.

At the **Lines** section place review the information prepopulated and choose a tax rate if required. Click **Calculate** to show the final gross amount, then **Submit**:



Total VAT	500.00
Net Total	2,500.00
Gross Total	3,000.00

-

Click **Send Invoice** at the **Are You Ready to send?** Prompt to submit the invoice to Snyk:

Are You Ready to Send? ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Note: On successful submission, you will see a green confirmation banner.

How to create a Credit Note

Click on the **Invoices** tab on the main menu. The Invoices page appears:

Invoices

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

Create Invoices i

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TEST-Invoice 1	07/02/24	Pending Approval	SNYK-569	3,000.00 GBP	No		
Invoice 10	07/02/24	Pending Approval	SNYK-569	3,000.00 GBP	No		

1. Click on **Create Credit Note** and choose the relevant **Reason** (for the purpose of the next steps, we will use the **Resolve issue for invoice number** option).
2. Choose the Invoice you wish to credit and click **Continue**:

Credit Note ✕

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.

Reason Resolve issue for invoice number Other (e.g. rebate)

3. Select if you wish to **Completely cancel the invoice with a credit note** or **Adjust invoice with a credit note** and click Create (for the purpose of next steps, we will completely cancel):

Credit Note ✕

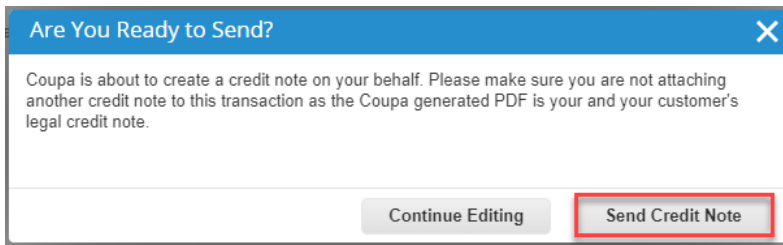
How do you want to correct invoice "Invoice 10" ?

Completely cancel the invoice with a credit note i
 Adjust invoice with a credit note i

4. Complete the header section including **Credit Note #** and **Credit Reason**. Please also include a **Scan** of the physical credit note.



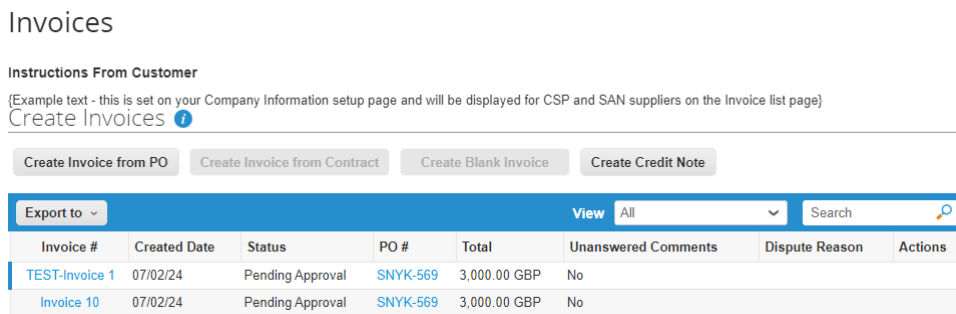
5. Review and click **Submit** and then **Send Credit Note** at the **Are You Ready to Send** prompt box.



Note: You have the option to choose to create a new invoice for the one you just cancelled.

View and Manage Invoices

Click on the **Invoices** tab on the main menu. The Invoices page appears:



The Invoices table shows the following information:

Column	Description														
Invoice #	Your defined invoice number. Click on it to view														
Created Date:	Date of when the invoice was created.														
Status	<p>Current Status of invoice:</p> <table border="1"> <tr> <td>Draft</td> <td>The invoice has been created, but it has not been submitted to your Snyk yet</td> </tr> <tr> <td>Pending Approval</td> <td>The invoice is currently under review by Snyk.</td> </tr> <tr> <td>Approved</td> <td>The invoice has been accepted for payment by Snyk</td> </tr> <tr> <td>Processing</td> <td>The invoice is being processed by Snyk AP and should be paid soon.</td> </tr> <tr> <td>Voided</td> <td>Something is wrong with the invoice. Please contact Snyk</td> </tr> <tr> <td>Disputed</td> <td>Invoice has information that Snyk does not agreed to, needs further clarification and/or finds incorrect.</td> </tr> <tr> <td>Abandoned</td> <td>The disputed invoice has been abandoned if credit note wasn't applied. Snyk can choose to notify you of this invoice status change and provide instructions.</td> </tr> </table>	Draft	The invoice has been created, but it has not been submitted to your Snyk yet	Pending Approval	The invoice is currently under review by Snyk.	Approved	The invoice has been accepted for payment by Snyk	Processing	The invoice is being processed by Snyk AP and should be paid soon.	Voided	Something is wrong with the invoice. Please contact Snyk	Disputed	Invoice has information that Snyk does not agreed to, needs further clarification and/or finds incorrect.	Abandoned	The disputed invoice has been abandoned if credit note wasn't applied. Snyk can choose to notify you of this invoice status change and provide instructions.
Draft	The invoice has been created, but it has not been submitted to your Snyk yet														
Pending Approval	The invoice is currently under review by Snyk.														
Approved	The invoice has been accepted for payment by Snyk														
Processing	The invoice is being processed by Snyk AP and should be paid soon.														
Voided	Something is wrong with the invoice. Please contact Snyk														
Disputed	Invoice has information that Snyk does not agreed to, needs further clarification and/or finds incorrect.														
Abandoned	The disputed invoice has been abandoned if credit note wasn't applied. Snyk can choose to notify you of this invoice status change and provide instructions.														
PO #	PO number generated by Coupa for the order on which the Invoice is based. Click on it to view the PO														
Total	Gross total of invoice														
Unanswered Comments	Any comments on the invoice from Snyk that you need to respond to.														



Dispute Reason	Reason given by Snyk for disputed invoice.
Actions	Click on the Edit or Delete icon to edit or delete an invoice. Note you can only edit or delete draft invoices.

To resolve a dispute, click on the relevant button at the bottom of the invoice and select relevant option:

Select Customer:

Invoices

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

Export to: View: Search:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TEST-Invoice 1	07/02/24	Disputed	SNYK-569	3,000.00 GBP	No	Price different from PO/Contract or Catalog	
Invoice 10	07/02/24	Pending Approval	SNYK-569	3,000.00 GBP	No		

Follow steps outlined to resolve either via credit, cancel or adjustment (note that options and resolutions shown will be dependent on country).

View and Manage PO's

Click on the **Orders** tab on the main menu to be taken the **Purchase Order** screen.

Purchase Orders

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



Export to: View: Search:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
SNYK-569	07/02/24	Issued	None	1 Each of TEST	No	2,500.00 GBP		

The Purchase Order table shows the following information:

Column	Description								
PO Number	PO number generated by Coupa. Click on it to view.								
Order Date	Date when the was created and issued.								
Status	Current Status of PO: <table border="1" style="width: 100%;"> <tr> <td>Buyer Hold</td> <td>PO is approved but pending a Snyk Procurement Buyer to review.</td> </tr> <tr> <td>Cancelled</td> <td>The PO is canceled and does not need to be fulfilled.</td> </tr> <tr> <td>Issued</td> <td>The PO was approved and sent to you.</td> </tr> <tr> <td>Soft Closed</td> <td>The PO is closed but can be reopened. You cannot invoice against a PO in this status.</td> </tr> </table>	Buyer Hold	PO is approved but pending a Snyk Procurement Buyer to review.	Cancelled	The PO is canceled and does not need to be fulfilled.	Issued	The PO was approved and sent to you.	Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Buyer Hold	PO is approved but pending a Snyk Procurement Buyer to review.								
Cancelled	The PO is canceled and does not need to be fulfilled.								
Issued	The PO was approved and sent to you.								
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.								
Acknowledged At	Date when you acknowledged the receipt of the PO, or "None" If not acknowledged. You can choose to let Snyk know that you received their PO by selecting the Acknowledged At checkbox on the PO. When you select the checkbox, the current date appears in the Acknowledged At column.								
Items	List of item(s) on the PO.								
Total	Total amount of the PO (note this does not include tax).								
Actions	Click on the icons for the following actions:								



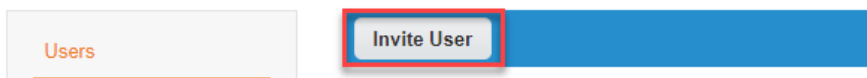
- | | |
|--|--|
| | <ul style="list-style-type: none"> - Create (flip the PO into) an invoice  - Create a credit note  |
|--|--|

How to provide access to new team members in CSP

If you wish to add a colleague to your profile in the Coupa Supplier Portal just click **Setup** and **Invite User**



Admin Users



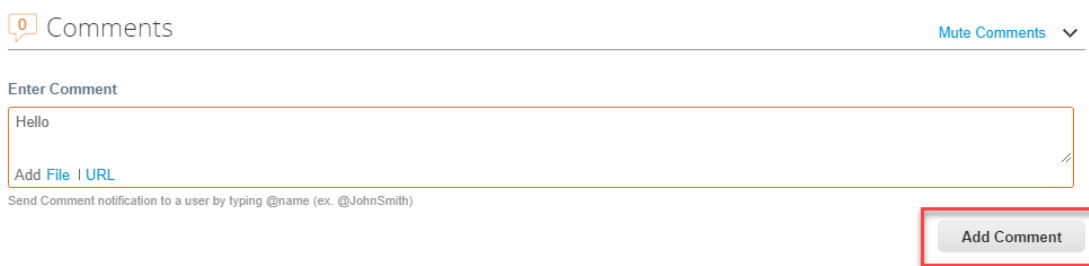
Add their **First Name, Last Name** and **Email**, choose any permissions or customer profile changes you wish to make and click **Send Invitation**:

- Order Line Confirmation
- Forecast Planner



How to communicate with Snyk

On all PO's, Invoices and Credit Notes, there is a **Comments** box at the bottom that you can add questions, notes etc that will be shared with Snyk. Snyk can also respond if necessary (all Snyk responses will also be emailed to your registered address).



Note you can also add attachments via File and hyperlinks via URL

B) Supplier Actionable Notifications ("SAN")

Supplier Actionable Notifications is another way to submit invoices to Snyk by "flipping" a Purchase Order to an invoice directly from the email notification. This is useful to quickly submit an invoice and/pr if you are doing just one time business with Snyk.

How to Create an invoice from SAN

1. In the email sent from Snyk with the PO, choose the **Create Invoice** button:



Snyk Purchase Order #SNYK-570

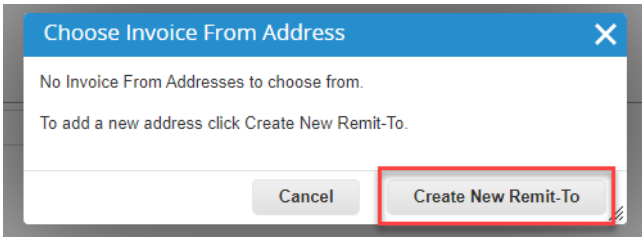
Order Summary

Date 07/02/24
PO Total 2,500.00 USD
Payment Terms NET30
Contact



Orders details below

- 2. Select your **Invoice From** Address or click **Create New Remit-To** if you have not used Coupa before:



- 3. Complete the Remit-To if needed including all key information shown with a red asterisk * and click **Create and Use**

Address

Remit To Name

* Line 1 The Whitehouse

Line 2

Line 3

Line 4

* City Washington

State None

* Postal Code 123455

Preferred Language English (United States)

Tax Registration

Tax Country/Region United States

Tax ID 123123

Not For Cross-Border Invoices

- 4. On the **Create Invoice** page, complete all mandatory information (marked with a red asterisk *) at the header level including **Invoice #**, and **Buyer VAT ID** if required..

Create Invoice Create

General Info

* Invoice # TEST-WD1

* Invoice Date 07/02/24

* Payment Term NET30

Date of Supply 07/02/24

* Currency USD

Delivery Number

Status Draft

Image Scan Choose file Invoice.pdf

Supplier Note

Attachments Add File | URL | Text

- 5. Attach a PDF version of your invoice by choosing **Image Scan**.

At the **Lines** section place review the information prepopulated and choose a tax rate if required. Click **Calculate** to show the final gross amount, then **Submit**:



Total VAT	500.00
Net Total	2,500.00
Gross Total	3,000.00

- Delete
- Cancel
- Save as Draft
- Calculate
- Submit

Click **Send Invoice** at the **Are You Ready to send?** Prompt to submit the invoice to Snyk:

Are You Ready to Send? ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Continue Editing Send Invoice

Note: On successful submission, you will see a green confirmation banner.

Invoices

1 invoice #TEST-WD1 is pending approval

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be **Create Invoices** ⓘ)

Create Invoice from PO Create Invoice from Contract Create



C) How to Request help from Coupa Support

If you encounter technical issues while working with the portal you may request support from the Coupa technical team. To do that just simply click on the **Chat with Coupa Support** window at the bottom right corner:



Ensure that the mandatory data is input in the fields marked with red asterisks * and click on the blue **Start Chat** button:

Chat with Coupa Support

* First Name: Jack

* Last Name: Jones

* Email: [Empty]

Phone: [Empty]

* Issue Related To: Select Issue

Subject to Coupa [Terms of Use](#) and [Privacy Policy](#).

Start Chat

Prefer Phone Support?
Chat is free and fast, or you can upgrade to phone support.

UPGRADE NOW