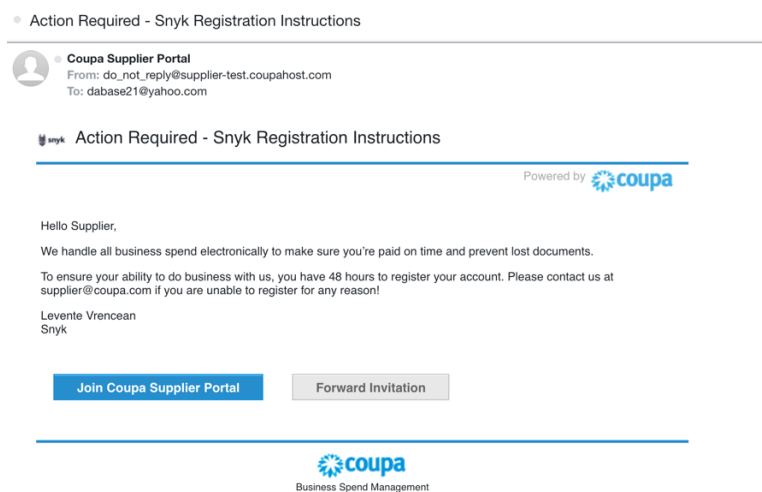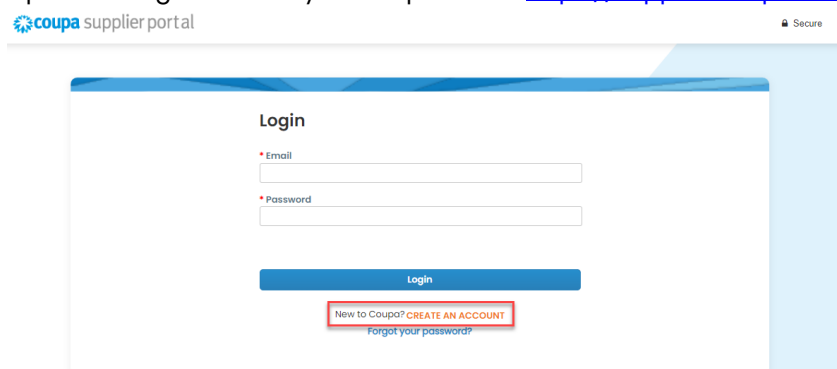# Coupa Supplier Portal ("CSP") User Guide
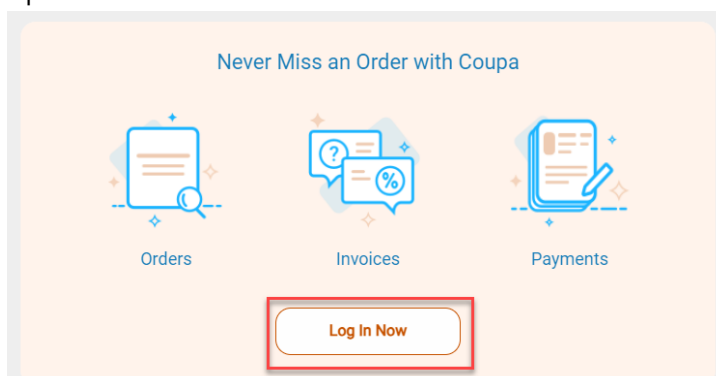
Coupa Supplier Portal ("CSP")

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).
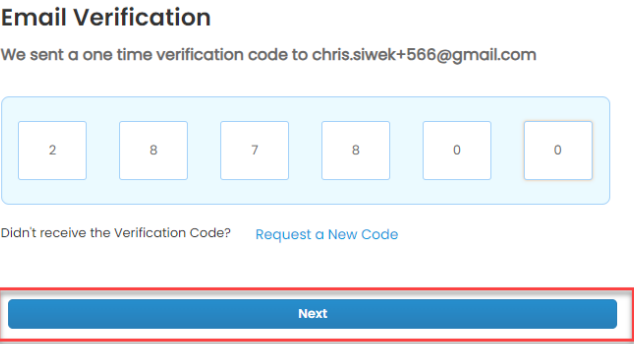
1. Open the email invitation that was sent by Snyk and click on **Join Coupa Supplier Portal** button:
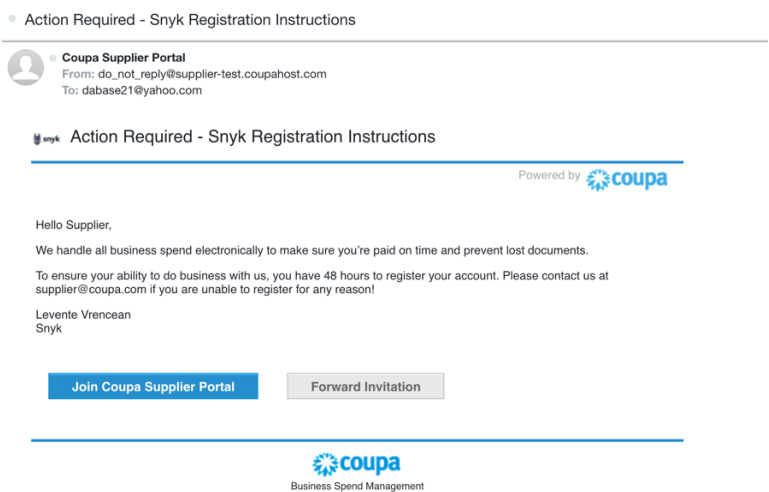
2. Complete all required fields shown on the **Create an Account** screen, accept the privacy policy and terms of use and click **Create an Account** button:
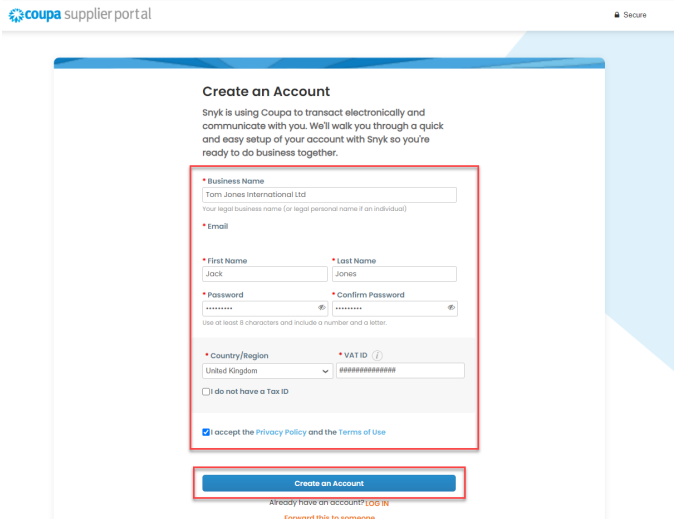
3. Complete email verification using the one-time code sent your registered email address and click **Next:**

4. Complete your **Coupa Supplier Portal Onboarding form** and click **Next**:

Coupa Supplier Portal Onboarding

Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details   Payment Information

Primary Address

* Country/Region	* Address Line 1	Address Line 2	
▾			⊕

* City	* State	* Postal Code

Next

Once the required details, such as address and payment information, have been submitted via the form, the system will automatically proceed with profile creation, approval, and activation. Subsequently, the newly created profile will be linked within the platform.

5. 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.

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

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**:

How to create an invoice

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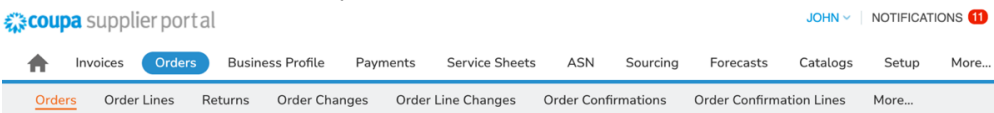
Note: You can also choose **Create Invoice from PO** button from the **Invoice** tab to be taken to the same screen.

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

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.

Note:

- o Some information will be prepopulated from your profile
- o 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**:

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

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:

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**:

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):

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	Current Status of invoice: | 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:

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.

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><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>
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: - 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**
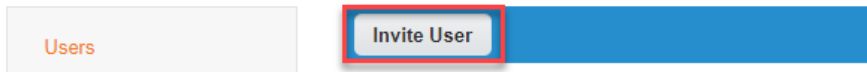


Add their **First Name, Last Name** and **Email**, choose any permissions or customer profile changes you wish to make and click **Send Invitation**:

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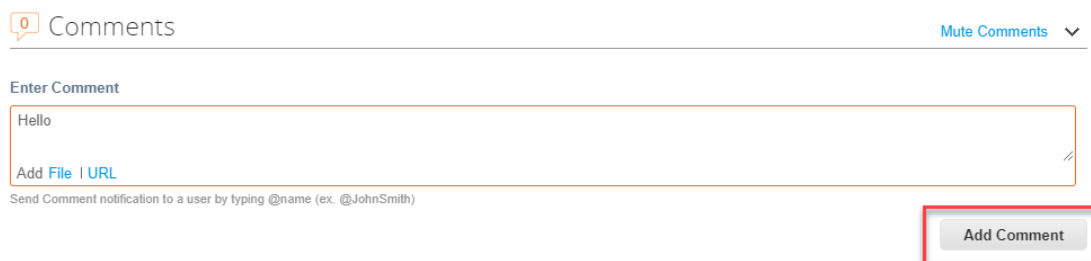
Note you can also add attachments via File and hyperlinks via URL