

# 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):

Action Required - Snyk Registration Instructions	
Coupa Supplier Portal From: do_not_reply@supplier-test.coupahost.com To: dabase21@yahoo.com	
ursk Action Required - Snyk Registration Instructions	
Powered by 🎇 COUPA	
Hello Supplier,	
We handle all business spend electronically to make sure you're paid on time and prevent lost documents.	
To ensure your ability to do business with us, you have 48 hours to register your account. Please contact us at supplier@coupa.com if you are unable to register for any reason!	
Levente Vrencean Snyk	
Join Coupa Supplier Portal Forward Invitation	
Business Spend Management	

Option 2: Register directly on the portal via <u>https://supplier.coupahost.com/</u>:
 **@coupa** supplier portal
 **\*** Secure

• Email  • Password  Login	Login		
	• Email		
Login	Password		
Login			
	Login		

• Option 3: Purchase Order Email:

Neve	Miss an Order with Co	oupa
Orders	Invoices	Payments
	Log In Now	

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 <u>supplierenablement@snyk.io</u>.



#### 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:

<b>coupa</b> supplier port al		Secure
communicate with y	a to transact electronically and yau. We'll walk you through a quick our account with Snyk so you're	
Business Name     Tom Jones International     toar legal builtess name (or I     *Email	at tud r logal personal name il an individua)	
First Name Jack     Password	Lost Name Jones     Confirm Password	
	di include a number and a letter.	
Country/Region	• VAT ID ()	
United Kingdom I do not have a Tax ID I do not have a Tax ID I do cept the Privacy Pol	v exercises view of the view o	
Aiready	Create an Account dy have an account (CO N	
For	orward this to someone	

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

#### **Email Verification**

We sent a one	time verifico	ation code to	o chris.siwek+	566@gmai	il.com	
2	8	7	8	0	0	
Didn't receive the Verification Code? Request a New Code						
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

rimary Address Country/Region	* Address Line 1	Address Line 2	
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 <u>https://supplier.coupahost.com/</u>, input your email and password and click **Login**:

Login	
• Email	
XXXXXX	
* Password	_
Login	
New to Coupa? CREATE AN ACCOUNT	-
Forgot your password?	

#### How to create an invoice

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

<b>ecou</b> p	a supp	lier port	al							JOHN ~	NOTIFICATI	ONS 1
A	Invoices	Orders	Busin	ess Profile	Payments	Service Sheets	ASN	Sourcing	Forecasts	Catalogs	Setup	More
Orde	rs Orde	er Lines	Returns	Order Char	nges Orde	er Line Changes	Order Cont	firmations	Order Confirm	ation Lines	More	

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



Click on the Create Invoice (<sup>5</sup>) icon for the PO in the Actions column of the Purchase Orders table.
 Purchase Orders

			Click t	he 🍓 Action to Invoice from	a Purchase Order		
Export to ~					View All	✓ Search	,0
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total Assigned To	Actions

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 Invoi	ice Create	
🔅 General Info	C	F
* Invoice #	TEST-Invoice 1	0
* Invoice Date	07/02/24	
Payment Term	NET30	* Invoic
* Date of Supply	07/02/24	
* Currency	GBP 🖌	
Delivery Number		
Status	Draft	* R
Image Scan	Choose file Invoice.pdf	
* Supplier Note	For PO as requested	
Attachments 🥡	Add File   URL   Text	Be
Discount Amount		Bank A
Cash Accounting Scheme		
Margin Scheme		* Shi

Note:

Instructions From Customer

- $\circ$   $\quad$  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**:

Total V	/AT		500.00
Net To	tal		2,500.00
Gro	ss Total		3,000.00
Delete	Cancel	Save as Draft	Calculate

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:

structions From	m Customer						
xample text - this reate Invo		npany Information setup	page and will	be displayed for C	SP and SAN suppliers on the Inv	voice list page}	
Create Invoice t	( DO 0			te Blank Invoice	Create Credit Note		
Create invoice	trom PO Crea	te invoice from Contr	act crea	ite Blank Invoice	Create Credit Note		
Export to ~	from PO Crea	te invoice from Contr	act Crea	ite Blank Invoice	View All	← Search	P
	Created Date	Status	PO#	Total		<ul> <li>Search</li> <li>Dispute Reason</li> </ul>	ې Actions
Export to v					View All		Actions

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).

Credit Note		
If you are issuing a credit note in regards to a pr include the invoice number. If you are issuing a customer please select other.	5	11 11
	Invoice 10	~

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" ?		
<ul> <li>Completely cancel the invoice with a credit note <i>i</i></li> <li>Adjust invoice with a credit note <i>i</i></li> </ul>		
	Cancel	Create

- 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.

ou're about to send an credit note to		, <b>,</b>
ve to contact your customer directly	to make changes to the credit not	te.
,	9	
,	<u>j</u>	
, ,		
,,	Continue Editing	Send Credit Note



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:

#### Invoices

xample text - this reate Invo		pany Information setu	p page and will	be displayed for CS	P and SAN suppliers on the Inv	voice list page}	
Create Invoice f	rom PO Crea	te Invoice from Contr	ract Crea	te Blank Invoice	Create Credit Note		
Export to ~					View All	✓ Search	
Export to ~	Created Date	Status	PO #	Total	View All Unanswered Comments	<ul> <li>✓ Search</li> <li>Dispute Reason</li> </ul>	Actions
	Created Date 07/02/24	Status Pending Approval	PO # SNYK-569	<b>Total</b> 3,000.00 GBP			Action

The Invoices table shows the following information:

Column	Description	
Invoice #	Your defined ir	nvoice number. Click on it to view
Created Date:	Date of when t	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 #	-	enerated by Coupa for the order on which the ed. Click on it to view the PO
Total	Gross total of i	nvoice
Unanswered Comments	Any comment	s on the invoice from Snyk that you need to respond to.
Dispute Reason	Reason given	by Snyk for disputed invoice.
Actions		lit or Delete icon to edit or delete an invoice. Note you can lete draft invoices.



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

								Опук	
Invoices	5								
nstructions Fr	om Customer								
Example text - th Create Inv		Company Informati	on setup pag	ge and will be d	splayed for CSP	and SAN su	ppliers on the Invoice list page	e}	
Create Invoic	e from PO	Create Invoice from	n Contract	Create B	lank Invoice	Create C	Credit Note		
Export to ~						View All	~	Search	₽
Invoice #	Created Date	Status	PO #	Total	Unanswered C	omments	Dispute Reason		Actions
TEST-Invoice 1	07/02/24	Disputed	SNYK-569	3,000.00 GBP	No		Price different from PO/Contra	act 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.

Instructions F	rom Custome	r						
Example text -	this is set on you	ur Company	Information setup page	e and will be displayed for CSF	and SAN suppliers on the Purchase Order list p	age}		
			Click t	the 🍓 Action to Invoi	ce from a Purchase Order			
Export to ~					View All	~	Search	\$
Export to ~ PO Number	Order Date	Status	Acknowledged At	Items	View All Unanswered Comments		Search Assigned To	Actions

#### The Purchase Order table shows the following information:

Column	Description	
PO Number	PO number ge	enerated by Coupa. Click on it to view.
Order Date	Date when the	was created and issued.
Status	Current Status	of PO:
	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	If not acknowledge their PO by sel	u acknowledged the receipt of the PO, or "None" edged. You can choose to let Snyk know that you received ecting the Acknowledged At checkbox on the PO. When checkbox, the current date appears in the Acknowledged
Items	List of item(s)	on the PO.
Total	Total amount	of the PO (note this does not include tax).
Actions	Click on the ic	ons for the following actions:
	- Create	e (flip the PO into) an invoice
	- Create	e 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**:

<ul> <li>Order Line Confirmation</li> <li>Forecast Planner</li> </ul>		
	Cancel	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).

Comments	Mute Comments	~
Enter Comment		
Hello		
Add File I URL		11
Send Comment notification to a user by typing @name (ex. @JohnSmith)		_
	Add Comment	t

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