

Coupa Supplier Portal and Supplier Actionable Notifications User Guide

September 15, 2020
Version 4

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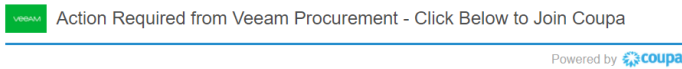
A) Coupa Supplier Portal

How to register on portal

- Through the email invitation sent by Veeam (preferred method)

Action Required from Veeam Procurement - Click Below to Join Coupa Inbox x

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to me ▾



Hello Ritter_Sport,

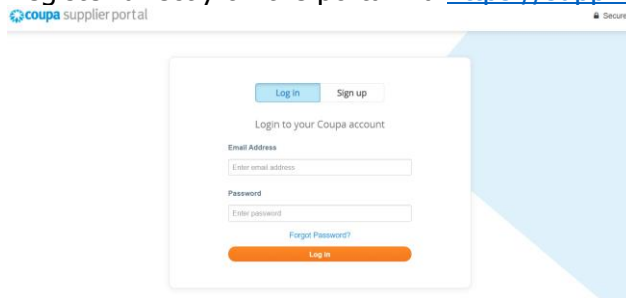
Veeam Procurement wants to connect with you on Coupa. Once registered you can do things with Veeam Procurement (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Coupa's Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!

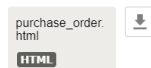
Dmitry Denisov
Veeam Procurement



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

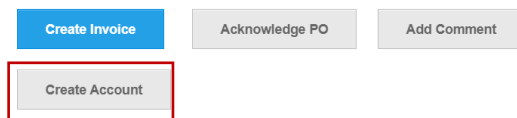


- Purchase Order email



Amust Software Corporation LLC Purchase Order #6305

Powered by Coupa

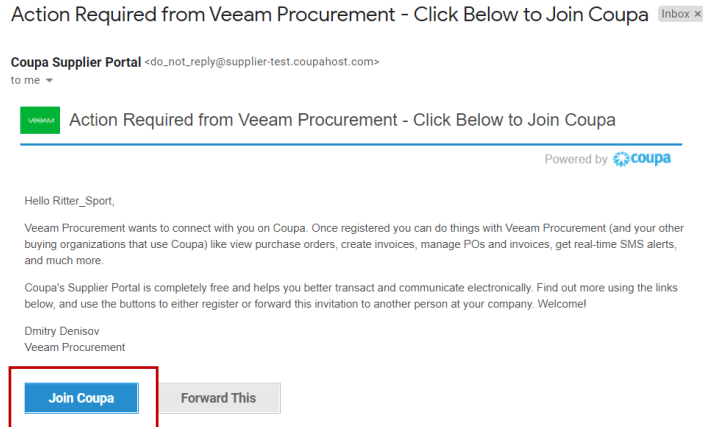


Note: if you decide to register through option 2: directly through portal or option 3: Purchase Order email in order to finalize your registration your account will have to be linked with Veeam Coupa instance. To do that, please, inform Veeam through Supplier.Enablement@veeam.com email address.

How to create account

Here, we will review how to create your account through Option 1: email invitation sent by Veeam.

Open invitation email sent by Veeam. Click on the "Join Coupa" button as per screenshot below.



Fill in the mandatory fields to provide basic information for your account and your company's public profile. Depending on the version you may be asked for:

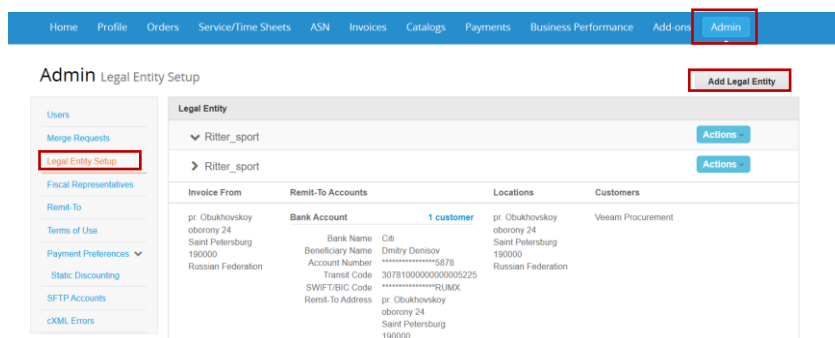
Field	Description
First Name	Your name
Last Name	Your last name
Company	Company's legal name
Email	Email address
Password	Password
Password Confirmation	Confirm the password

Check "I accept the Privacy Policy and the Terms of Use" check box. By default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration.

Note: you can forward your invitation to invite other colleagues from your organization any time by entering their email address in the Forward email field and clicking Submit button.

How to Setup Legal Entity

To set up your account to create electronic invoices, click on the "Legal Entity Setup" link on the left of the Admin page and then "Add Legal Entity".



The Legal Entity page appears. You can add new legal entity or manage, or deactivate existing one.

To add a legal entity, click on the **Add Legal Entity** button in the top right corner and enter the official name of your business that is registered with the local government and select the country where it is located.

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.

* 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.

Click on "Continue" button, and then fill in at least the mandatory fields, marked with a red asterisk (*)

Miscellaneous Information

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.

* Legal Entity Name

Country

Co Reg Num.

Permit Date

Registered seat

File Reference No.

Conducting business in certain countries requires your invoice to contain specific information about your company.

Enter a date with the following specification: YYYY-MM-DD (eg 10-14-2010)

Click "Save & Continue" button.

Keep feeling in mandatory fields

Tell your customers about your organization

Which customers do you want to see this?

All

Veeam Procurement

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country

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.

Ensure mandatory fields are complete including "VAT ID" field. If you don't have a VAT ID field, check "I don't have VAT/GST number" checkbox and complete "Local Tax ID"

What is your Tax ID? [?](#)

Country: Czech Republic

* VAT ID:

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Complete Banking Information:

Where do you want to receive payment?

1 2 3 4

* Payment Type: Bank Account

Banking information [?](#)

Bank Account Country: Czech Republic

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

RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations). [?](#)

Note: it is highly recommended that you fill in your banking details to ensure Veeam has the most recent and up-to-date information.

Follow the instructions to finalize legal entity setup:

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	argentinska 280 prague 123 57 Czech Republic	Active	Manage

Deactivate Legal Entity Cancel 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	
argentinska 280 prague 123 57 Czech Republic	Active	Manage

Deactivate Legal Entity Done

Setup Complete

1 2 3 4

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 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.

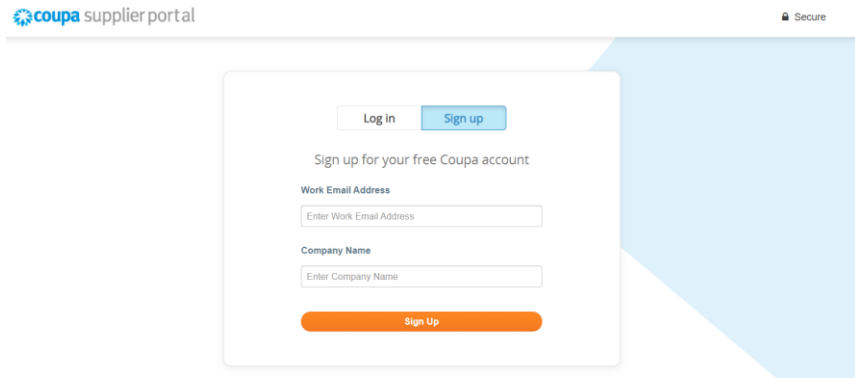
Go to Orders Go to Invoices Return to Admin Done

Click "Done" to complete setup process.

Note: you may create multiple "Legal Entities" if you have different currency bank accounts number, or different legal entities which must be paid.

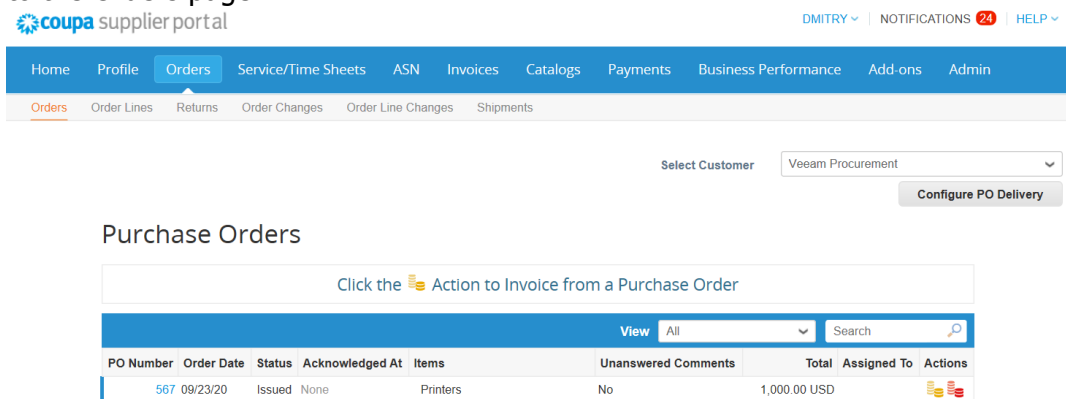
How to login to CSP

Once you have registered you will need to login to [portal](#) when you plan to work with it. To do that, input your credentials on the right-hand side to login and click on the "Log In" button.

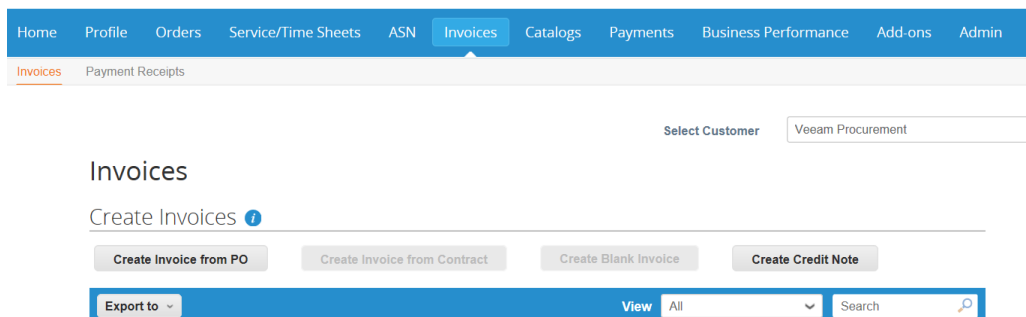


How to create and / or edit invoice

1. Go to the Orders page




or, on the Invoices page, click on the Create Invoice from PO button above the table to go to the Orders page.



2. On the Orders page, do one of the following:

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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
333	12/03/19	Issued	None	test purchase	No	None	

- Or click on the PO Number link to open the purchase order and click on the "Create Invoice" button.

Purchase Order #567

Status Issued - Sent via Email

Order Date 09/23/20

Revision Date 09/23/20

Requester Dmitry Denisov


Email backendsystems-coupa-pilot-Dmitry.Denisov@veeam.com

Payment Term None

Attachments None


Acknowledged

Assigned to


 Shipping


Ship-To Address 195197 St Petersburg
Kondratievskiy pr. 15-3
Russian Federation
Location Code: LOC027
Attn: Dmitry Denisov

Terms DDP

 Shipment Tracking + Add


No shipment tracking.

 Lines

		Advanced	Search	Sort by	Line Number: 0 → 9
1	Type Item	Price	Total	Invoiced	
	 Printers	1,000.00	1,000.00	0.00	
* Delivery Required By Part Number Manufacturer Name Manufacturer Part Number					
	09/30/20	None	None	None	


Per page 15 | 45 | 90

Total USD **1,000.00**


Create Invoice
Save
 Print View

3. On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk*) in your invoice (example: Invoice # and Invoice Date):


Create Invoice Create

 General Info

* Invoice #

* Invoice Date 10/01/20 

Payment Term

Date of Supply 10/01/20 


* Currency USD

Delivery Number

Status Draft

Image Scan Browse...

Supplier Note

Attachments  Add File | URL | Text

Note:

1. It is highly recommended that you attach pdf version of your invoice to the electronic one. To do that click on "Add File" in "Attachments" section.
2. Make sure pdf version of invoice is consistent with the Coupa electronic invoice.

- Never use Image Scan section to attach your pdf document as it will not be available to your business representative in Veeam for validation.

In some other cases the system might propose you to input exchange rate into the corresponding field if the PO currency will be different from the currency your bank should receive.

Create Invoice Create

General Info

* Invoice #

* Invoice Date 10/01/20

Payment Term

Date of Supply 10/01/20

* Currency USD

Delivery Number

Status Draft

Image Scan

Supplier Note

Attachments

Cash Accounting Scheme

Margin Scheme

Discount %

* Exchange Rate

Some other fields are pre-populated with information from the PO. Check and review this data in the pre-populated fields before proceeding to the next step.

Note:

- If you have a blanket PO for monthly, quarterly or annual invoices, please don't forget to adjust "Service Start Date" and "Service End Date" to make sure the service period is reflected correctly.

Ensure you reflect correct amount in the price field. You might face several scenarios:

- When the price on PO is not visible to you

333	12/03/19	Issued	None	test purchase	No	None
-----	----------	--------	------	---------------	----	------

In this case, when you create an invoice just input the price amount in the "price" field to be paid for you based on the agreed scope of work.

Lines

Type	Description	Price	
	Cristina Test PO	1000	0.00 <input type="button" value="x"/>
PO Line 254-1	Contract <input type="text"/>	Supplier Part Number <input type="text"/>	* Service Start Date <input type="text"/> <small>For goods please select the actual delivery date and use the same date as start and end date.</small>

Click "Calculate" button at the bottom of the invoice to ensure the Total price is refreshed

Total VAT	0.00 CZK	0.00 USD
Net Total	1,400.00 CZK	1,000.00 USD
Gross Total	1,400.00 CZK	1,000.00 USD

And click "Submit" button to send invoice to Veeam and "Send Invoice" right after

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.

- When the price on PO is visible to you

567	09/23/20	Issued	None	Printers	No	1,000.00 USD	
-----	----------	--------	------	----------	----	--------------	--

In this case either accept the full PO amount if you delivered what was agreed as per PO

Lines

Type	Description	Price	1,000.00
	Printers	1,000.00	
PO Line	Contract	Supplier Part Number	* Service Start Date
567-1			09/24/20

For goods please select the actual delivery date and use the same date as start and end date.

- Or adjust price in the "price" field if it differs from the original scope

Lines

Type	Description	Price	1,000.00
	Printers	500	
PO Line	Contract	Supplier Part Number	* Service Start Date
567-1			09/24/20

For goods please select the actual delivery date and use the same date as start and end date.

- Click "Calculate" button at the bottom of the invoice to ensure the Total price is refreshed

Total VAT	CZK	0.00 USD
Net Total	CZK	500.00 USD
Gross Total	CZK	500.00 USD

- Click "Submit" and "Send Invoice" button to send invoice to Veeam.
2. To edit invoice before it was submitted to Veeam, click on the pencil () icon in the invoice "Actions" section:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	12/27/19	Draft	306	130,000.00 RUB	No	

Do necessary changes and submit to Veeam or leave for later.

In case you do not need draft of invoice just click on the delete () icon in the invoice "Actions" section.

Note: you can only edit invoices in "Draft" status.

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 #	Invoice number generated by Coupa. Click on it to view the invoice														
Created Date	Date when the invoice was created.														
Status	<p>Current status of the invoice:</p> <table border="1"> <tr> <td>Draft</td> <td>The invoice has been created, but it has not been submitted to your customer yet.</td> </tr> <tr> <td>Pending Approval</td> <td>The invoice is currently under review by your customer</td> </tr> <tr> <td>Approved</td> <td>The invoice has been accepted for payment by your customer.</td> </tr> <tr> <td>Processing</td> <td>The invoice is being processed by the AP department and should be paid soon.</td> </tr> <tr> <td>Voided</td> <td>Something is wrong with the invoice. Contact your customer to get the invoice back on track.</td> </tr> <tr> <td>Disputed</td> <td>These are invoices with information that Veeam doesn't agree to, needs clarification on, or finds incorrect.</td> </tr> <tr> <td>Abandoned</td> <td>The disputed invoice has been abandoned if credit note wasn't applied. Veeam 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 customer yet.	Pending Approval	The invoice is currently under review by your customer	Approved	The invoice has been accepted for payment 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.	Disputed	These are invoices with information that Veeam doesn't agree to, needs clarification on, or finds incorrect.	Abandoned	The disputed invoice has been abandoned if credit note wasn't applied. Veeam 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 customer yet.														
Pending Approval	The invoice is currently under review by your customer														
Approved	The invoice has been accepted for payment 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.														
Disputed	These are invoices with information that Veeam doesn't agree to, needs clarification on, or finds incorrect.														
Abandoned	The disputed invoice has been abandoned if credit note wasn't applied. Veeam 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	Total amount of the invoice														
Unanswered Comments	Your comments on the invoice for your customer. Also, your customer's comments that you need to respond to.														
Actions	Click on the Edit () or Delete () icon to edit or delete an invoice. You can edit or delete only draft invoices.														

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

RS_12345	11/28/19	Disputed	306	150,000.00 RUB	No	 Resolve
Per page 15 45 90						

Depending on the type of invoice, you have the following options:



- For standard e-invoice
 - o "Void": if an invoice was issued in duplicate or has already been paid for through an earlier invoice, or
 - o "Correct" invoice if an invoice has some incorrect information. When submitting a corrected invoice, you can use the same invoice number.
- For country compliant e-invoice
 - o "Cancel": if an invoice was issued in duplicate, create a credit note to cancel it. If an invoice has some incorrect information (other than price or quantity), for example, incorrect tax rate or item description, create a "credit note" to cancel it and issue a new corrected invoice. The original invoice remains in disputed status and the corrected invoice is submitted for approval.
Note: The corrected invoice must have a new number.
 - o Adjust: If the price and/or the quantity for invoice lines(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it.

View and manage Purchase Orders

Click on the "Orders" tab on the main menu. The Orders page with the Purchase Orders table appears.

The Purchase Orders table shows the following information:

Column	Description	
PO Number	PO number generated by Coupa. Click on it to view the PO.	
Order Date	Date when the PO was created.	
Status	Current status of the PO.	
	Buyer Hold	The PO is approved but pending buyer review.
	Cancelled	The PO is cancelled and does not need to be fulfilled.
	Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
	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 your customer 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 items on the PO.	
Total	Total amount of the PO.	

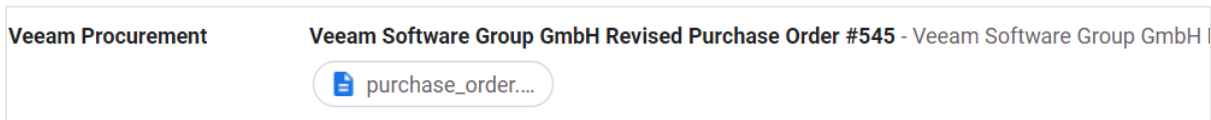
Actions	Click on the icons for the following actions: <ul style="list-style-type: none"> - Create (flip the PO into) an invoice  - Create a credit note 
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B) Supplier Actionable Notification

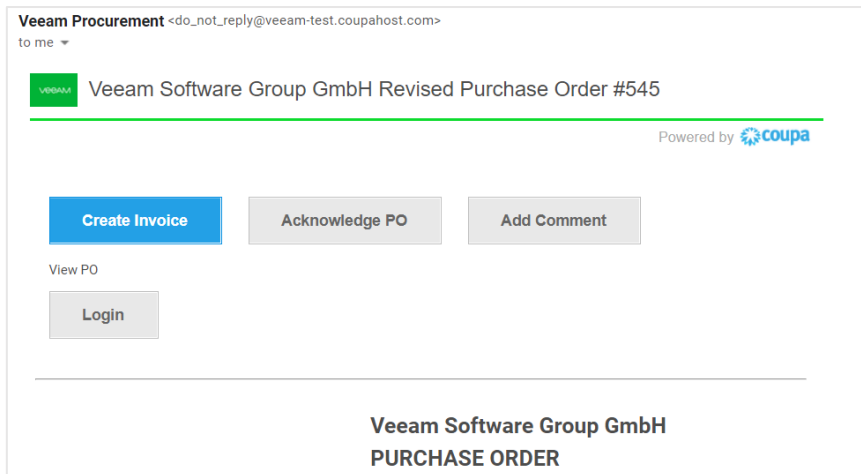
Supplier Actionable Notification (SAN) is another way of sending invoices back to Veeam flipped from Purchase Orders. This option is advised in case of one-time business with Veeam (1 or 2 invoices).

How to Create invoice from SAN

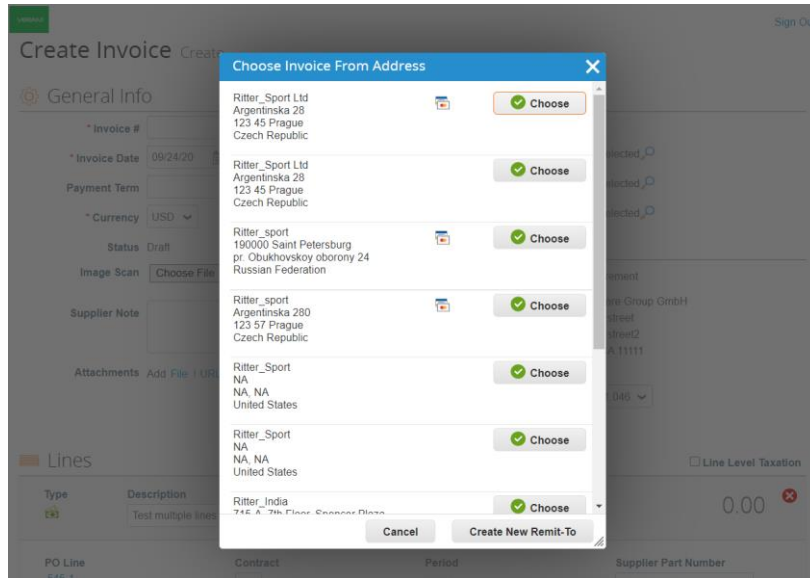
1. Before creating invoices via Supplier Actionable Notification (SAN) receive PO from Veeam via email.



2. Open email and click on the blue "Create Invoice" button to create invoice



3. Select the Invoice From address or "Create New Remit-To" if you create invoice for the 1st time:



4. When you select an option "Create New Remit-To" fill in all mandatory fields including Tax ID and banking information
5. Input invoice number, check invoice date and the rest of information

Note: please add pdf version of invoice into the Attachments section via "Add File" option and never use Image Scan for that

6. Adjust the price in the "price" field if applicable

7. Hit "Calculate" button and click on blue "Submit" invoice button

Total	1,000.00
<input type="button" value="Delete"/>	<input type="button" value="Cancel"/>
<input type="button" value="Save as Draft"/>	<input type="button" value="Calculate"/>
	<input type="button" value="Submit"/>

8. Click on "Send Invoice"

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.

C) How to create a Credit Note

In case your original invoice was disputed by Veeam Finance, you will need to create a Credit Note to cancel the invoice.

Note: The electronic credit note must have the same amount as your original invoice, but with negative (minus) price in order to completely cancel the invoice.

To do that, go to your Coupa Supplier Portal account and click on the "Invoices" tab as per screenshot below:

The screenshot shows the 'Invoices' section of the Coupa Supplier Portal. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Add-ons, and Admin. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Veeam Procurement'. Under the 'Invoices' heading, there is a 'Create Invoices' link with a help icon. Below this, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a red rectangular box.

Click on the "Create Credit Note" button and select the applicable Reason, which is "Resolve issue for invoice number"

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)

Click on the drop-down list to select the original invoice # xxxxxx, which needs to be cancelled

Click on "Continue" button and select "Completely cancel the invoice with a credit note" and then click "Create" button

Or click "Adjust invoice with a credit note" if original invoice amount needs to be reduced.

1. In case you go with a first option such as "Completely cancel the invoice with a credit note", you will be taken to a Credit Note form, where you'll need to fill in all mandatory fields (marked with red asterisk) such as: credit note number, credit note date and etc.

Note: It is mandatory that you attach a pdf version of the credit note!

It is important that you first click 'Calculate' at the bottom of the form and after the amount is displayed correctly then click the Submit button.

Now you have cancelled the initial invoice by creating a credit note with the same amount. After this step you should be able to recreate your original invoice with the total price.

- In case you go with the 2nd option such as "Adjust invoice with a credit note", in addition to the option #1, you will be able to adjust the price on the credit note line level

Note: It is mandatory that you attach a pdf version of the credit note!

It is important that you first click 'Calculate' at the bottom of the form and after the amount is displayed correctly then click the Submit button.

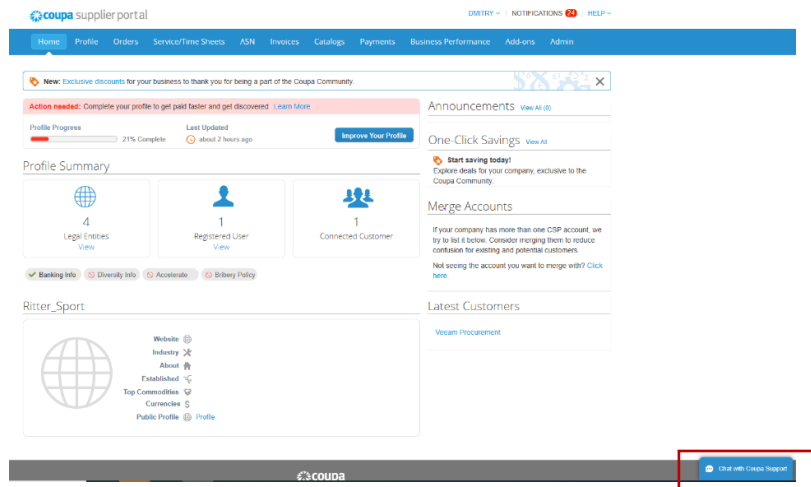
D)How to provide access to new team members in CSP

When you need to provide access to new employees in Coupa Supplier Portal, it can easily be done via "Setup" tab and clicking blue "Invite User" button

In the window which will pop-up just fill in relevant information and check Permissions and Customers and click on blue "Send Invitation" button.

E) How to Request help from Support team

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 asterisks and click on the blue "Start Chat" button

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.

*First Name

*Last Name

*Email

Phone