



Navigating the CSP & creating reports and notifications

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

—

2019

Navigating the CSP & creating reports and notifications

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Navigating the CSP & setting up a profile

Navigating the CSP: Homepage

1. **Account:** Your user account name.
2. **Menu:** CSP menu.
3. **Notifications:** Allows you to view notifications or to manage your notification preferences
4. **Help:** Access the CSP help menu.
5. **Your company name:** Displays your company name as it is set up for KPMG LLP.
6. **Merge Accounts:** Use this section to merge multiple CSP accounts.

The screenshot shows the Coupa Supplier Portal homepage. At the top, the logo 'coupa supplier portal' is on the left. On the right, there are links for 'EVA', 'NOTIFICATIONS' (with a red badge containing the number 6), and 'HELP'. Below this is a blue navigation bar with the following items: 'Home' (highlighted with a purple callout 2), 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The main content area is titled 'TEST EW' (with a purple callout 5). On the left, there is a globe icon and a list of profile fields: 'About', 'Industry' (with a sub-value 'Other information technology and...'), 'Website', 'Established', and 'Employees' (with a sub-value '5-24'). A blue button labeled 'Improve Your Profile' is positioned below the profile fields. On the right, there is a section titled 'Merge Accounts' (with a purple callout 6) containing text about merging accounts and a link 'Click here'. Below this is a section titled 'Latest Customers' with a link 'KPMG LLP DEV'. At the bottom of the page, there are links for 'About' and 'Public Profile', and a URL: 'https://supplier-test.coupahost.com/suppliers/public/27601'. Purple callouts 1, 3, and 4 are also present, pointing to the 'EVA', 'NOTIFICATIONS', and 'HELP' links respectively.

Navigating the CSP: Menu overview

1. **Home:** Brings you back to the home menu.
2. **Profile:** Allows you to update your profile.
3. **Orders:** Access the purchase order section to view and acknowledge purchase orders and flip a PO into an invoice and/or credit note.
4. **Service/Time Sheets:** Allows you to submit service time sheets. (This is **not** used for KPMG LLP).
5. **ASN:** Allows you to submit advance shipping notifications. (This is **not** used for KPMG ULLP).

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right side of the navigation bar, there are links for 'EVA', 'NOTIFICATIONS' (with a red circle containing the number 6), and 'HELP'. Below the navigation bar, there is a horizontal menu with items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Eight numbered callouts (1-8) are placed over the interface: 1 points to the Home menu item; 2 points to the Profile menu item; 3 points to the Orders menu item; 4 points to the Service/Time Sheets menu item; 5 points to the ASN menu item; 6 points to the Invoices menu item; 7 points to the Catalogs menu item; and 8 points to the Admin menu item. The main content area shows a profile for 'TEST EW' with a globe icon and a list of links: About, Industry, Website, Established, and Employees. There is also a section for 'Merge Accounts' and 'Latest Customers'.

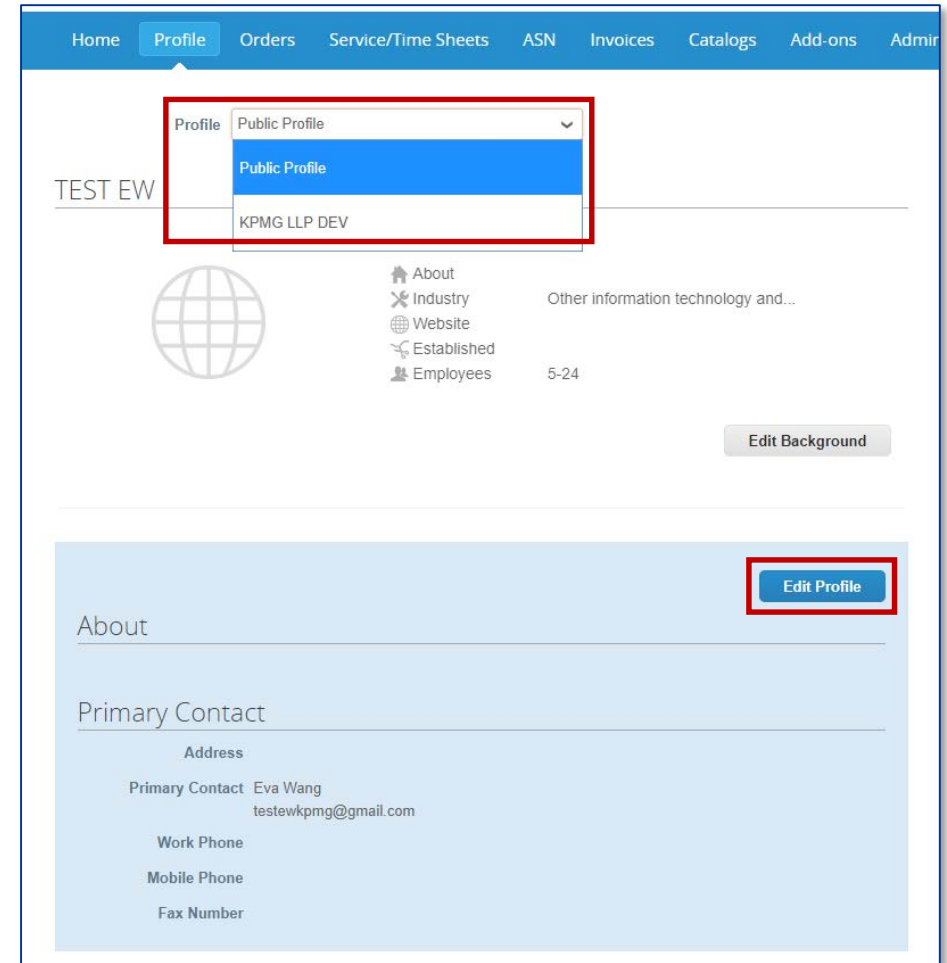
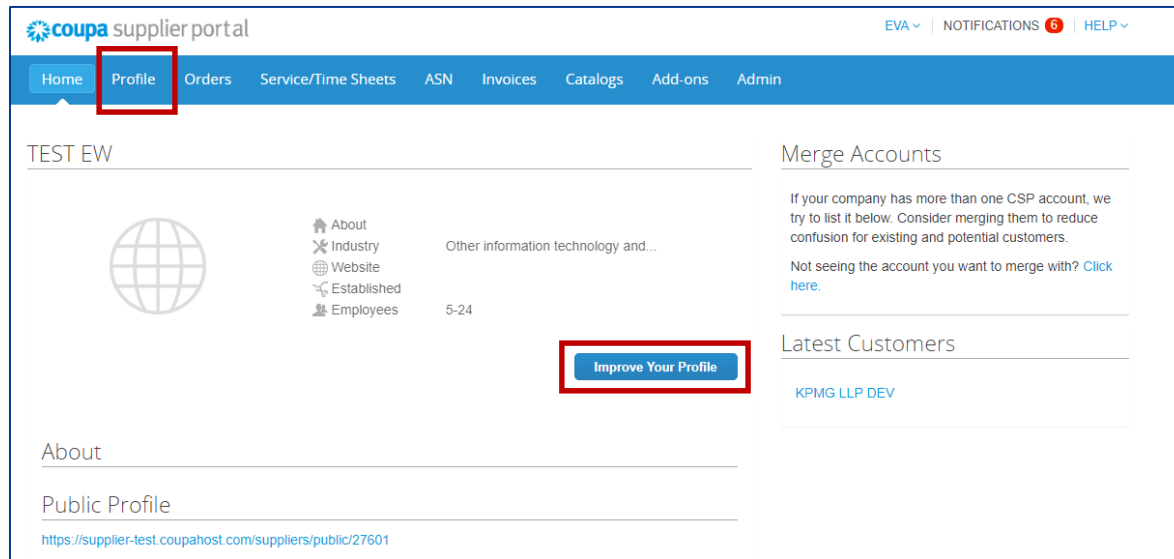
6. **Invoices:** Access the invoices section to view and submit invoices.

7. **Catalogs:** Access to the catalog section (This is **not** used for KPMG LLP).

8. **Admin:** Allows you to maintain your admin settings: invite additional users, set a remit to address, etc.

Setting up a profile

1. Click on **Profile** or **Improve Your Profile** to edit your profile.
2. Choose whether the profile is public or **KPMG LLP** from the **Profile** drop down at the top of the page. Choosing **public** means that anyone with a Coupa Supplier Portal account can access this information.
3. Click on **Edit Profile** to edit your profile.



Setting up a profile

4. Complete the fields and click **Save** at the top or bottom of the page.

You can update your profile at any time in this section. These changes will be immediately visible to KPMG LLP.

Cancel **Save**

General Information

* Name

Logo No file chosen

Industry

Year Established

Short Description

About

Employees

Web Site

LinkedIn Profile

Facebook Profile

Twitter Profile

Alibaba Profile

Address

Address Line 1

Address Line 2

City

State

Postal Code

Country

Primary Contact

* First Name

* Last Name

* Email

Work Phone

Mobile Phone

Fax Number

Identification private section

Tax ID #

DUNS #

Remit-To private section

Remit-To locations let your customers know where to send payment for their invoices. You can create a single Remit-To for each customer or assign the same one to multiple customers. Note: Not all your customers may be enabled to use Remit-To's but it is generally required on invoices.

To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

Cancel **Save**



Inviting additional users

Inviting additional users

1. Once you are logged into the CSP, click **Admin** in the top menu. Then click **Invite User** in the **User** section.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' button is highlighted with a red box. Below the navigation bar, the 'Admin Users' section is visible. The 'Users' link in the left sidebar is highlighted with a red box. The 'Invite User' button in the top right of the main content area is also highlighted with a red box. The main content area displays a table with the following data:

Users	Permissions	Customer Access
Eva Wang testewkpmg@gmail.com Edit	ASNs ASNs Admin Admin Catalogs Catalogs Invoices Invoices Orders Orders Payments Profiles Profiles Service/Time Sheets Service/Time Sheets	KPMG LLP DEV

Inviting additional users

2. Complete the required information and click **Send Invitation**. You can control the permissions and customers that the invited user has by checking/unchecking the options under **Permissions** and **Customers**.

Once the invited user registers, they will be able to log into the CSP using their own log in credentials.

Invite User ×

First Name

Last Name

* Email

Permissions

- All
- Admin
- Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets
- Payments

Customers

- All
- KPMG LLP DEV



Creating reports & downloading invoices

Creating reports

You can create a custom report anywhere where you see a **View** drop down field. This example shows how to create a report in Invoices.

Click on the **Invoices** tab and in the **View** drop down field click **Create View**.

coupa supplier portal

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

Disputed
Disputes with a supplier response
Disputes without supplier response
Draft
Payment Information
Pending Approval
Processing
Voided

NOTIFICATIONS 6

Invoices

Instructions From Customer
Test invoice instructions for supplier

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Bank Invoice

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
003 EW	04/30/19	Approved	K000117	1,200.00 GBP	No	
0022	04/24/19	Pending Approval	K000101	-960.00 GBP	No	
002	04/24/19	Approved	K000101	1,200.00 GBP	No	
0011	04/24/19	Approved	K000102	-24.00 GBP	No	
001	04/24/19	Approved	K000102	600.00 GBP	No	

Creating reports

1. **Name:** Provide a name for your report (must be less than 30 characters).
2. **Select Customer:** Allows you to select the invoices for a sepecific customer. Select **KPMG LLP**.
3. **Visibility:** Choose who can see your report. Ensure that you always select **Only Me**. If you select **Everyone** all other users within your organizaition will be able to see your report.
4. **Start with View:** Allows you to set a starting condition fo your report (i.e. start with all ordered requisitions).

The screenshot shows the 'Create New data table view' interface. At the top right, a 'Select Customer' dropdown menu is highlighted with a red box, showing 'KPMG LLP DEV' selected and another 'KPMG LLP DEV' option below it. Below this, the 'General' tab is highlighted with a red box. It contains a 'Name' text input field, 'Visibility' radio buttons for 'Only Me' (selected) and 'Everyone', and a 'Start with view' dropdown menu set to 'All'. Below the 'General' tab, the 'Conditions' tab is highlighted with a red box. It features a 'Match all conditions' dropdown menu, a highlighted 'Add group of conditions' button, and a partially filled condition row: 'Invoice #' dropdown, 'is' dropdown, and an empty text input field. A green plus icon is visible at the end of the condition row.

5. **Conditions:** Select **Match All Conditions** or **Match at least one condition** to identify if you want your report to match all conditions or any conditions.

6. **Add groups of conditions:** Allows you to add groups of conditions and then select **Match all conditions from at least one group** or **Match at least one condition from every group**

Creating reports

- 7. Columns:** Drag and drop fields from the **Available Columns** section to the **Selected Columns** section.

You can drag and drop the fields to re-order the order you want the columns to appear in your report. All fields under **Selected Columns** will be viewable in your report.

- 8. Sort By:** Allows you to sort your data by specific criteria.
- 9. Click Save** to save the report.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order

Available Columns	Selected Columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Delivery Number	PO #
Dispute Reason	Total
Disputed Date	Unanswered Comments
Document Type	Actions
Invoice Date	
Linked Document	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	

Default Sort Order

Sort by in order.

Cancel

Creating reports

10. Once you have saved the report you can click **Export to** to export the report to a **CSV** or **Excel** file type.

Select Customer KPMG LLP DEV

Invoices

Instructions From Customer
Test invoice instructions for supplier

Create Invoices i

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View Approved Search

Date	Status	PO #	Total	Unanswered Comments	Actions
	Approved	K000117	1,200.00 GBP	No	
	Approved	K000101	1,200.00 GBP	No	
0011 04/24/19	Approved	K000102	-24.00 GBP	No	
001 04/24/19	Approved	K000102	600.00 GBP	No	

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Downloading invoices

11. Coupa stores all the invoices that you have created. If you need to acquire all the invoices, click **Export to** to download **Legal Invoice (zip)**.

Please NOTE: As Coupa generates legal (VAT) invoices on your behalf, it is important that you retain these documents in your document retention (archiving) system. This may be your accounting system. To facilitate the easy download of these, you can use this space to export those pdf original invoices to a zip file where you can then upload them into your archiving system of choice.

if you would like to keep your legal invoices in the CSP, you must consider whether it complies with any local storage rules and regulations in your jurisdiction before doing so.

The screenshot shows the 'Invoices' page for customer 'KPMG LLP DEV'. It includes a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below this is a table of invoices with columns for 'Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', and 'Actions'. The 'Export to' dropdown menu is open, showing options for 'CSV (current columns)', 'Excel (current columns)', and 'Legal Invoice (zip)', which is highlighted with a red box. The table contains four rows of invoice data.

Date	Status	PO #	Total	Unanswered Comments	Actions
	Approved	K000117	1,200.00 GBP	No	
	Approved	K000101	1,200.00 GBP	No	
0011 04/24/19	Approved	K000102	-24.00 GBP	No	
001 04/24/19	Approved	K000102	600.00 GBP	No	

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Managing notifications

Managing notifications

1. You can manage your notifications by clicking **NOTIFICATIONS** (top right of the page) and then click **Notification Preferences**.

The screenshot shows the Coupa Supplier Portal interface. At the top right, the 'NOTIFICATIONS' menu item is highlighted with a red box and has a red badge with the number '6'. Below the navigation bar, the 'My Notifications' section is visible. A 'View' dropdown menu is set to 'All'. A table of notifications is shown with one entry: 'New PO K000125 for £490.00 issued by KPMG LLP DEV.' received on '05/01/19 08:50 AM'. A 'Notification Preferences' button is highlighted with a red box in the top right corner of the notification area.

coupa supplier portal EVA ▾ **NOTIFICATIONS** 6 HELP ▾

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

My Notifications

View All ▾

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	New PO K000125 for £490.00 issued by KPMG LLP DEV.	05/01/19 08:50 AM

Notification Preferences

Managing notifications

2a. You can enable / disable **Online**, **Email** and **SMS** notifications for **Catalogs**, **Coupa Accelerate**, **Form Responses**, **Invoices** etc.

My Account Notification Preferences

Settings

Notification Preferences

Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Coupa Accelerate

New Early Pay Customer	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
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Coupa Pay

New digital check	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
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Form Responses

A form response is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A form response is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Supplier information is updated	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A new comment is received	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A form response needs your attention	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

Invoices

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
An invoice is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
An invoice is paid	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
An invoice is disputed	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
An invoice is withdrawn from dispute	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Legal Invoice Export Ready	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
An invoice is abandoned	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

Managing notifications

2b. You can enable / disable **Online, Email** and **SMS** notifications for **Orders, Profile, Terms of Use, Users, Service/Time Sheets** as per your personal preference.

3. Once finished, click **Save** to save your notification settings.

Category	Notification Type	Online	Email	SMS
Orders	A new comment is received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	A new order is received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Profile	Public profile is updated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	An information update request is received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Terms of Use	New Terms of Use are received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Users	A new customer connection is created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service/Time Sheets	A Service/Time Sheet is approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	A Service/Time Sheet is rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Thank you



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