

# Getting Started with Coupa Supplier Portal (CSP)

## Quilter Suppliers

### Before you get started

Quilter use the Coupa Supplier Portal as a channel to connect with our suppliers. Benefits of this portal include:

- Managing Purchase Orders (POs) and Invoices electronically
- Capability to see current status of invoices
- Capability to amend your company information and contact details
- It's free of charge to Suppliers

For full instructions and demonstrations visit the [Coupa Supplier Portal support on the Coupa website](#).

Supporting material specific to Quilter is also available on the [Quilter supplier website](#)

**Before using the Coupa Supplier Portal to submit invoices please review the following top tips to avoid delays.**

### Top Tips for a smooth journey:

- Before undertaking any work ensure you have a valid purchase order (PO) from Quilter.
- Always submit an invoice against the correct purchase order (PO) number, not doing so will risk rejection of the invoice.
- It's important that you don't submit an invoice more than once via any of the available channels. If you have previously submitted an invoice and are awaiting payment, contact Quilter Accounts payable at [QCORP\\_accountsexpenses@quilter.com](mailto:QCORP_accountsexpenses@quilter.com).  
Submitting the invoice again on CSP could cause further delay to payment.
- When loading invoices in to CSP please ensure that the invoice only covers one purchase order (PO) (or line of) and not multiple PO's. Each invoice submitted must be connected to the corresponding purchase order in the system. Not doing this can lead to delays in payment and may require rework or risk rejection of the invoice.
- If you charge separately for delivery and other costs associated with the goods or service provided ensure this amount is covered by the purchase order. Adding additional cost to an invoice not covered by the PO will result in delay and possible rejection of the invoice.

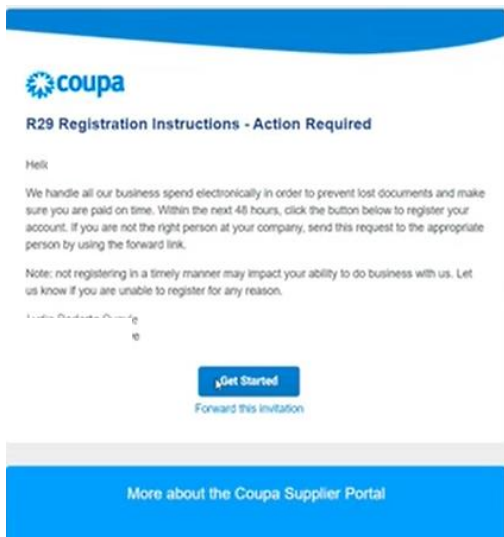
Note: At the top of each of the following sections there is a link to more detailed online support direct from Coupa.

1

## Registering for CSP – Full documentation is available at [Register for the CSP - Coupa Success Portal](#)

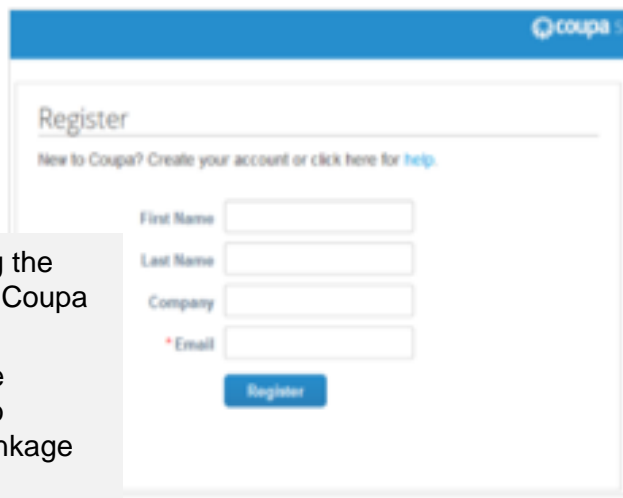
You will either be invited to join the CSP or you can self register.

### By email invite:



An email invite contains unique code to link your CSP account to Quilter.

### Self registration:



Note: Registration is available by using the link in an invite, a PO or by visiting the [Coupa Supplier Portal website](#).

If self registering on the Coupa website without an invite or PO you will need to contact Quilter in order to enable the linkage to your CSP account

2

## Create your account – Full documentation is available at [Create Your Account - Coupa Success Portal](#)

This will be the admin account  
Multiple logins can be created by Admin.

Complete the mandatory fields.

Note the ability to forward the invitation on to someone else in your company who may be responsible for PO's and Invoicing.

This must be to someone in the same email domain.

Forward Your Invitation  
Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have same email domain).  
Forward email  @coupa.com

3

**Login to CSP** – Full documentation is available at [Log in to the CSP - Coupa Success Portal](#)

Once you have registered to login go to <https://supplier.coupahost.com> and in the Log In pane on the right, enter your email address and password and click Log In

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and 'supplier portal'. Below the header, there are two main sections: 'Register' on the left and 'Log In' on the right. The 'Register' section includes a link for help, input fields for First Name, Last Name, Company, and Email, and a 'Register' button. The 'Log In' section includes a link for help, input fields for Email Address and Password, a 'Log In' button, and a 'Forgot Your Password?' link.

Consider taking the tours made available to you on login.

4

**Working With CSP** - Full documentation is available at [Work with the CSP - Coupa Success Portal](#)

## Purchase Orders

To view and manage a PO - [View and Manage POs - Coupa Success Portal](#)

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

The screenshot shows the Coupa Supplier Portal main menu. The 'Orders' tab is highlighted with a green circle. A callout box points to the 'Orders' tab with the text: 'Click here to amend how your PO's are delivered.' Below the menu, there is a 'Select Customer' dropdown menu with 'Coupa' selected. A callout box points to the dropdown with the text: 'From the Select Customer drop-down list in the top right corner, select Quilter'. Below the dropdown is a 'Configure PO Delivery' button.

## Purchase Orders

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3050	05/31/17	Issued	None	200 Each of Purple Spiral Notebook	No	100.00 USD	
3049	05/31/17	Issued	None	1 Box of Blue Pens	No	90.00 USD	
2818	07/31/19	Issued	08/19/19	Print Services	No	200.00 USD	



- Use the gold coins to create (flip the PO into) an invoice



- Use the red coins to create a credit note

### To view and manage a PO - [View and Manage POs - Coupa Success Portal](#)

## Purchase Orders

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3050	05/31/17	Issued	None	200 Each of Purple Spiral Notebook	No	100.00 USD	
3049	05/31/17	Issued	None	1 Box of Blue Pens	No	90.00 USD	
2818	07/31/19	Issued	08/19/19	Print Services	No	200.00 USD	

Click to view the PO detail.

Status	Description
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.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	Something is wrong with the PO. Contact your customer to get the PO back on track.
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.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

## Invoicing

**Create or Edit an invoice** – Full documentation is available at [Create or Edit an Invoice - Coupa Success Portal](#)

**Please ensure you only send an invoice once to avoid duplication.  
Invoices sent via method 2 will not show in CSP until they have been processed.**

**Invoices can generally be sent into Quilter in 2 ways:**

**Method 1:** Use the Coupa Supplier Portal to create an Invoice from a PO. This is a fast and efficient way to produce and manage your invoices into Quilter. This is the preferred method.

**Method 2:** Invoice can be sent via email to [invoices@quilter.coupa.com](mailto:invoices@quilter.coupa.com)

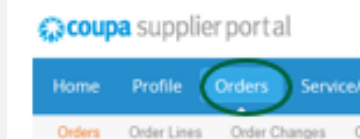
Remove all additional text, avoiding headers and footers in the email.

Each invoice should be a separate file. You can attach more than one invoice file to a single email. Invoices sent via this method are slower to process than using CSP. **Invoices must reference the purchase order number provided.**


### To create the invoice In CSP :

There are several ways to create an invoice in CSP, from PO or Contract. We will deal with the PO functionality here. For further instruction please review the detail documentation linked above.

Go to the Orders page (Note: if you are in the Invoice section click on the create “Invoice from PO” buttons as a short cut)



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

#### Purchase Order #3050

Status Issued - Sent via Email

Order Date 05/31/17

Revision Date 05/31/17

Requester FirstName LastName

Email FirstNameLastName@coupa.com

Payment Term Net 30

 Accelerate Payment

Attachments None

Acknowledged

#### Shipping

Ship-To Address 1855 South Grant Street  
San Mateo, CA 94402  
United States

Attn: FirstName LastName


Terms None

#### Lines

Advanced							Search	Sort by	Line Number: 0 → 9
1	Type	Item	Qty	Unit	Price	Total			Invoiced
		Purple Spiral Notebook	200	Each	0.50	100.00			0.00
Part Number None									

Per page 15 | 45 | 90

Total 100.00 USD



Create Service/Time Sheets

Request Change

Save

Print View

#### Comments

Add Comment

**Create or Edit an invoice** – Full documentation is available at [Create or Edit an Invoice - Coupa Success Portal](#)

Choose Invoicing Details ✕

\* Legal Entity  + Add New

Invoice From Success Street  
Customer City, 12345  
United States  
United States

\* Remit-To  + Add New

\* Ship From Address  + Add New

Ensure the legal entity, remit to and ship from addresses are correct.

Note: If you have no legal entity in the system you will need to create one.

Cancel

Create Invoice Create

**Important:** Remember this is the legal invoice. Do not attach another copy of the invoice – doing this will risk a delay in payment.

**Create an invoice**  
Fill in at least the mandatory fields (marked with a red asterisk) in your invoice.

- Information will default from the PO.
- Create an invoice number – Coupa will check this is not a duplicate.
- Ensure currency, remit from/to addresses are correct
- Ensure the value is correct and select the correct VAT rate.
- Add any additional items and tax if required (E.G. Delivery) The value of which must be included in the purchase order.
- Click calculate
- Check mandatory fields are complete.
- Click submit

**General Info**

\* Invoice #

\* Invoice Date  📅

Payment Term  Accelerate Payment

\* Currency

Delivery Number

Status

Shipping Term

Image Scan  No file selected.

Supplier Note

\* Attachments 📎 [Add File](#) | [URL](#) | [Text](#)

Discount Amount

Payment Order Reference

**From**

\* Supplier

Supplier Tax ID

\* Invoice From Address   
123 Success Ave  
Results City, XY 99999  
United States

\* Remit-To Address   
123 Success Ave  
Results City, XY 99999  
United States

\* Ship From Address   
123 Success Ave  
Results City, XY 99999  
United States

**To**

Customer

\* Bill To Address

Buyer Tax ID

Ship To Address

📄 Lines ☑️ Line Level Taxation

<span style="color: green;">+</span> Add Line				0.00
	Subtotal			0.00
	Shipping		<input type="text"/>	
	Tax Description (Shipping)	<input type="text"/>	<input type="text"/>	0.000
	Handling		<input type="text"/>	
	Tax Description (Handling)	<input type="text"/>	<input type="text"/>	0.000
	Misc		<input type="text"/>	
	Tax Description (Misc)	<input type="text"/>	<input type="text"/>	0.000
	Tax Description	<input type="text"/>	<input type="text" value="0"/>	0.00 <span style="color: green;">+</span>
	Total Tax			0.00
	<b>Total</b>			<b>0.00</b>

✕ Delete
Cancel
Save as draft
Calculate
Submit

🗨️ Comments

Add Comment

**Managing with Invoices** - Full documentation is available at [View and Manage Invoices - Coupa Success Portal](#)

### To view invoice and payment details

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

From the drop-down list in the top right corner of the Invoices page, select Quilter.

**Invoices**  
Create Invoices ⓘ

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
123	06/01/17	Draft	3050	113.20	No		
456	06/01/17	Disputed	None	150.00	No		
789	05/27/17	Pending Approval	2949	3,750.00	No		
121314	05/16/17	Approved	2891	15,000.00	No		

Per page: 15 | 45 | 90

To view an invoice select the Invoice number.

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. For more information, see <a href="#">Disputed invoices</a> .
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review 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.

**View invoice** – Full documentation is available at [View and Manage Invoices - Coupa Success Portal](#)  
Use CSP to review and manage your invoices. Including visibility of the payment status.

Select Customer Quilter - TEST - R29

Invoice #Test1 [Back](#)
 General Info

Invoice # Test1  
 Invoice Date 16/02/2021  
 Payment Term NET\_30  
 Delivery Date 15/02/2021  
 Currency GBP  
 Delivery Number None  
 Status Approved  
 Shipping Term None  
 Legal Invoice [download](#)  
 Image Scan None  
 Supplier Notes R29 TEST INVOICING  
 Attachments None



 Bill To & Ship To

Supplier R29 Test Supplier  
 Invoice From R29 Test Supplier  
 Old Mutual House  
 Portland Terrace  
 Southampton  
 SO14 7EJ  
 United Kingdom  
 Type of Company Ltd  
 Remit To R29 Test Supplier  
 Old Mutual House  
 Portland Terrace  
 Southampton  
 SO14 7EJ  
 United Kingdom  
 Ship From R29 Test Supplier  
 Old Mutual House  
 Portland Terrace  
 Southampton  
 SO14 7EJ  
 United Kingdom  
 Supplier VAT ID GB999999999

Note: You will also receive notification once the invoice has been approved and also when it has been paid.

### To see payment details

- Click the invoice number
- The invoice details will open.
- Scroll down to the payment section
- View the payment details

 Payments 

Status Ready to Pay

Paid-in-Full Date None

## Payment Reconciliation Details

Status	Date	Type	Description	Amount
--------	------	------	-------------	--------