

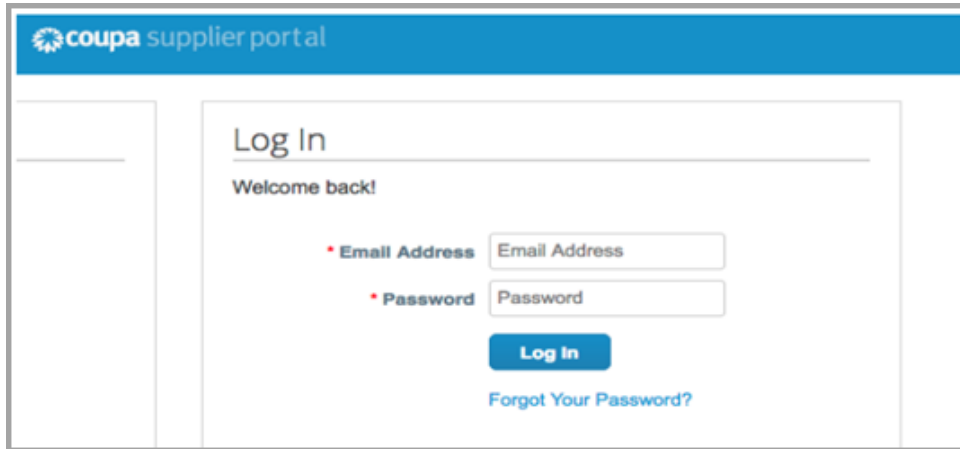
# Coupa Overview Guide

## About this Guide

This guide will provide a detailed breakdown of the **Coupa Supplier Portal** dashboard.

## Coupa Supplier Portal Overview

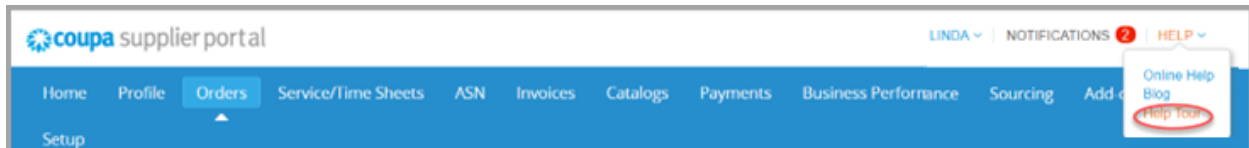
To access the **Coupa Supplier Portal (CSP)**, enter the Email Address and Password that was created when you first registered with Coupa, then click **Log In**.



**Note:** If you forgot your password, click **“Forgot Your Password?”** Coupa will send an autogenerated email to you. If you did not receive the email, check your Spam / Junk Folder.

## Coupa Supplier Portal Tour

Coupa has created a welcome tour for new users. It is recommended to take the tour at least once. Click on **HELP** in the upper right corner of the page to access the **Help Tour** from the drop-down menu.

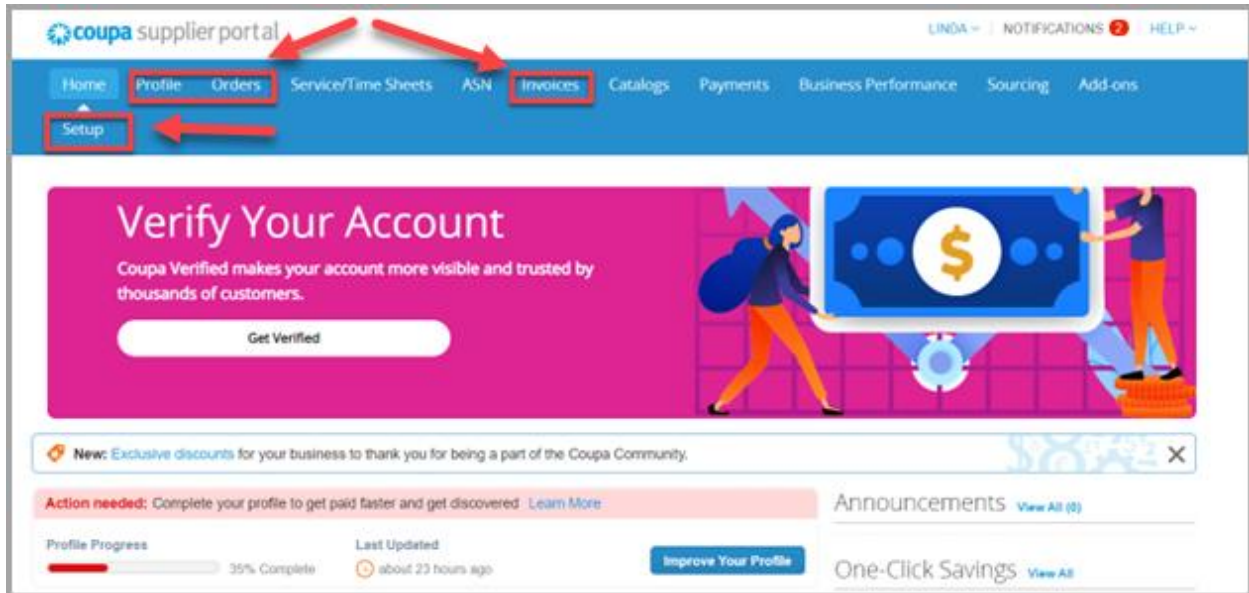


# Coupa Overview Guide

## The Coupa Homepage

The tabs you will be using for WM are:

- Profile
- Orders
- Invoices
- Setup



## Account Settings

**Account Settings** can be accessed by going to the top right corner of your screen and hovering or clicking on your name as shown the screen print below.



From the **Account Settings** page you can change your First and Last Name, your Email, your Department, your Role, and your Password. You can also Enable or Disable Two-Factor Authentication.

# Coupa Overview Guide

## Notifications and Notification Settings

Notifications functions like an Email inbox. You can view your notifications by clicking on the word **Notifications** in the top right corner of the screen. You can set or edit your notification preferences within the notifications area by clicking **Notification Preferences** button.

Once you adjust your preferences, be sure to scroll to the bottom of the screen to click **Save** (not shown).

The screenshot shows the Coupa Supplier Portal interface. At the top right, the user name 'LINDA' is displayed next to a dropdown arrow, followed by a 'NOTIFICATIONS' button with a red notification badge and a red arrow pointing to it, and a 'HELP' dropdown. Below this is a blue navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. A secondary row of links includes Sourcing, Add-ons, and Setup. A large pink banner for 'Verify Your Account' is present, with a 'Get Verified' button. Below the banner is the 'My Notifications' section, which has a 'Notification Preferences' button highlighted with a red box. A 'View' dropdown menu is set to 'All'. The notification list contains three items:

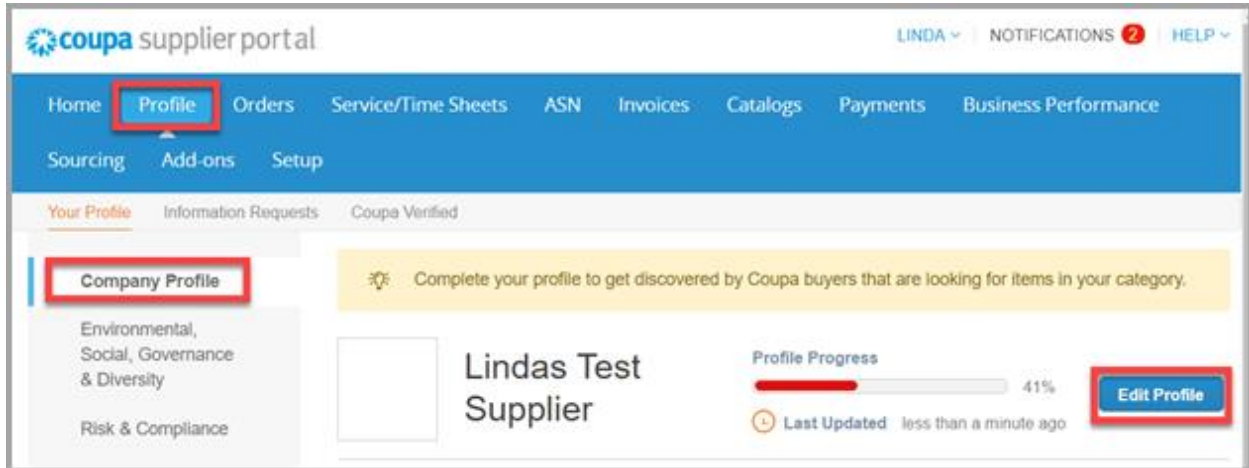
<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	First reminder from Waste Management - Lindas Test Supplier: Your information request is still pending.	02/08/23 07:02 AM
<input type="checkbox"/>	Credit Note TestCreditLc for -\$50.00 has been approved to pay by Waste Management - John's Icehouse.	02/08/23 10:06 PM

# Coupa Overview Guide

## Profile

Clicking on the **Profile** tab and navigating to “**Company Profile**” allows you to see your company profile information. Clicking the **Edit Profile** button allows you to update your company information if necessary.

You must click the **Submit for Approval** for the changes to take effect (not shown).



**Note:** Refer to our “**Supplier Profile Request Information Request Guide**” for more information and be sure to select “**WM**” from the dropdown menu if you have more than one Coupa profile.

# Coupa Overview Guide

## Orders

This is where Purchase Orders reside in Coupa. To view WM specific Purchase Orders, click on the **Orders** tab then select **WM** from the dropdown menu for “**Select Customer**”. This page also allows you to create an invoice by clicking on the gold stack of coins or clicking into the PO number.

**coupa supplier portal** LINDA NOTIFICATIONS 2 HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Payments Business Performance

Sourcing Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Header Confirmations Shipments

**Verify Your Account**  
Coupa Verified makes your account more visible and trusted by thousands of customers.  
[Get Verified](#)

Select Customer Waste Management - John's Icehouse

### Purchase Orders

**Instructions From Customer**  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)  
Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
11342347	01/03/23	Issued	None	1 Bag of Birthday Cake	No	100.00 USD		
11342339	12/22/22	Issued	None	2 Bag of Dog Boots 2 Each of Dog Socks	No	540.00 USD		
11342250	11/22/22	Issued	None	Large Service PO	No	10,000.00 USD		

# Coupa Overview Guide

## Invoices

This is your Invoices page. From here, you will be able to see the status of your submitted invoices.

You can use the **View** function to sort by status or “**Create View**” to create your own view.

**Note:** You will not be able to edit an Invoice once submitted.

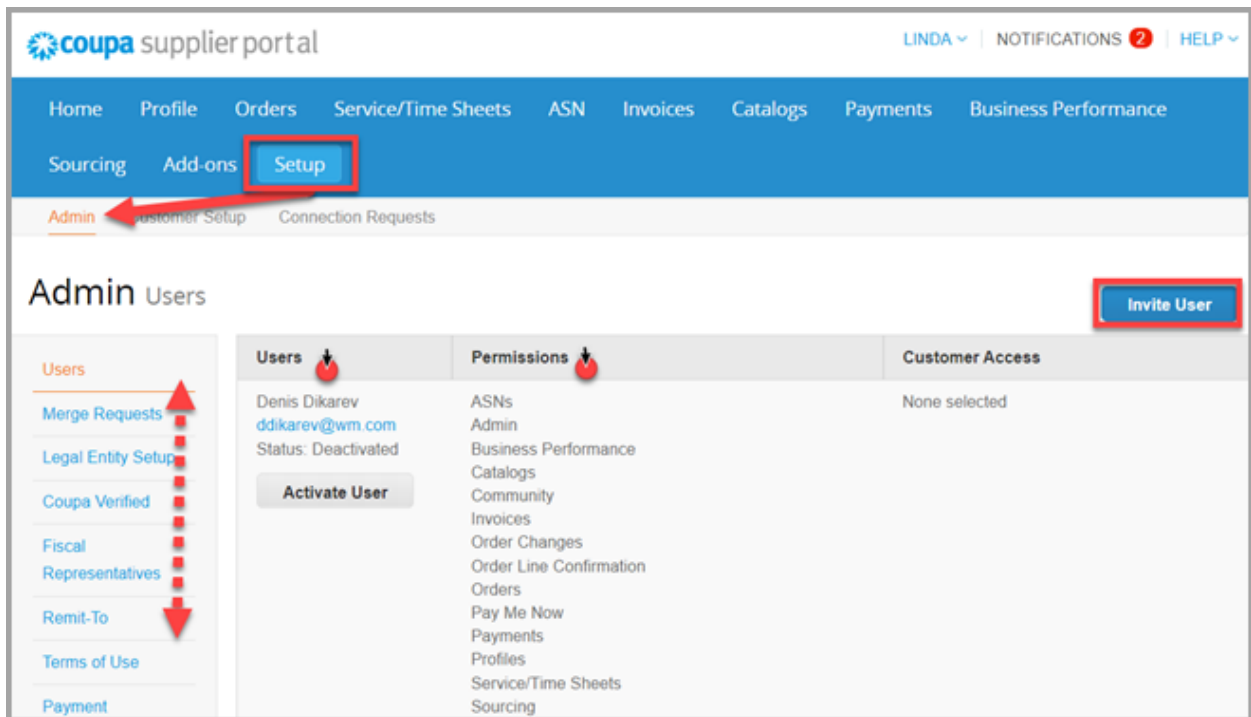
The screenshot shows the Coupa supplier portal interface. At the top, the user is logged in as LINDA, with a notifications icon and a help link. The navigation menu includes Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted), Catalogs, Payments, and Business Performance. Below this, there are links for Sourcing, Add-ons, and Setup. The main content area features a 'Verify Your Account' banner with a 'Get Verified' button. Below the banner, there is a 'Select Customer' dropdown menu set to 'Waste Management - John's Icehouse'. The 'Invoices' section includes 'Instructions From Customer' and a 'Create Invoices' link. There are four buttons for creating invoices: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A 'View' dropdown menu is highlighted with a red box, showing 'All' as the selected option. Below this is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The first row of the table shows 'Test 2023', '02/09/23', 'Pending Approval', '11242247', '100.00 USD', and 'No'.

# Coupa Overview Guide

## Admin Setup users

The administrative functions can be accessed by clicking **Setup** from the menu bar and then clicking **Admin** where you will be able to:

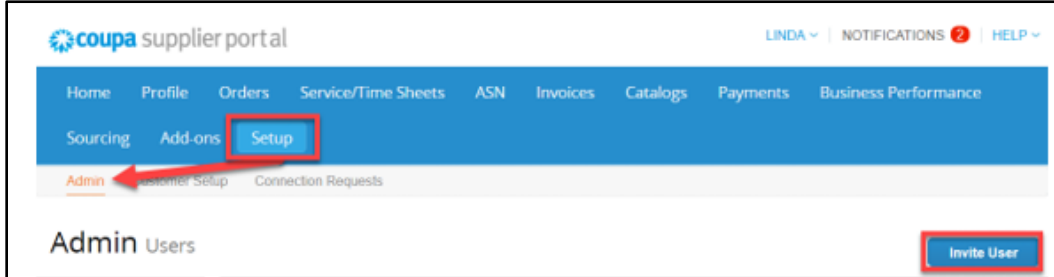
- **Add users** (see **Invite User** section below)
- **Merge your other Coupa accounts** - you will be able to manage your merge requests. Use this function if you have more than one Coupa profile. To send a merge request, enter in the email address of the other account, and click **“Request Merge.”** The customer will receive a notification to accept or decline.
- View your **remit-to information**
- Complete your e-Invoicing setup.
- **Legal Entity Setup** - view all the Legal Entities you created. You will be able to deactivate the entities by clicking **“Action”** or adding new Legal Entities by clicking **“Add Legal Entity.”**



# Coupa Overview Guide

## Invite User

To invite users, click “**Invite User,**” enter the user’s information, and select the permissions and customers you wish to allow access. Once you click “**Send Invitation,**” the user will receive an email from Coupa prompting them to accept and create a password.



The 'Invite User' modal form is displayed. It has a title bar with 'Invite User' and a close button. The form contains three input fields: 'First Name', 'Last Name', and '\* Email'. Below the input fields are two sections: 'Permissions' and 'Customers'. Each section has a list of checkboxes for selecting access rights. The 'Permissions' section includes options for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'All', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'All', 'Payments', 'Order Changes', 'Pay Me Now', 'Business Performance', 'Sourcing', and 'Order Line Confirmation'. The 'Customers' section includes options for 'All', 'Waste Management Dev - Testing Supplier Portal KB', 'Waste Management - Testing Supplier Portal KB', 'Waste Management - Kates Shop', 'Waste Management - John's Icehouse', and 'Waste Management - Lindas Test Supplier'. At the bottom of the form are two buttons: 'Cancel' and 'Send Invitation'.



# Coupa Overview Guide

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Adjusting your Coupa Supplier Portal Language To adjust the language on your Coupa Supplier Portal, scroll down to the bottom of the page and click on the English (US) box. A dropdown list will appear and there you will be able to select from a list of languages available in Coupa.

