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Coupa Supplier Portal (CSP)

Quick Reference Guide

What is Coupa Supplier Portal (CSP)?

Coupa is a free cloud-based system that helps businesses improve the procure to pay (P2P) process. NIISQ uses the Coupa Supplier Portal (CSP) to manage purchase orders, invoices, and credit notes. The CSP allows you as the provider to access all NIISQ purchase orders to your business in one central location, as well as being able to submit invoices and credit notes for approval and payment.

In order to submit an invoice, you will require a NIISQ Purchase Order to be issued to you.

This guide will assist you with logging in to the portal, viewing your purchase orders and uploading your invoice(s) for payment once the goods / services have been delivered.

What are the benefits of using Coupa?

- Receive, view, and manage purchase orders and history in one central location.
- A streamlined and faster invoice payment process
- View the status of invoices and payment details in real time
- Reduces risk of lost Invoices and delays in payments

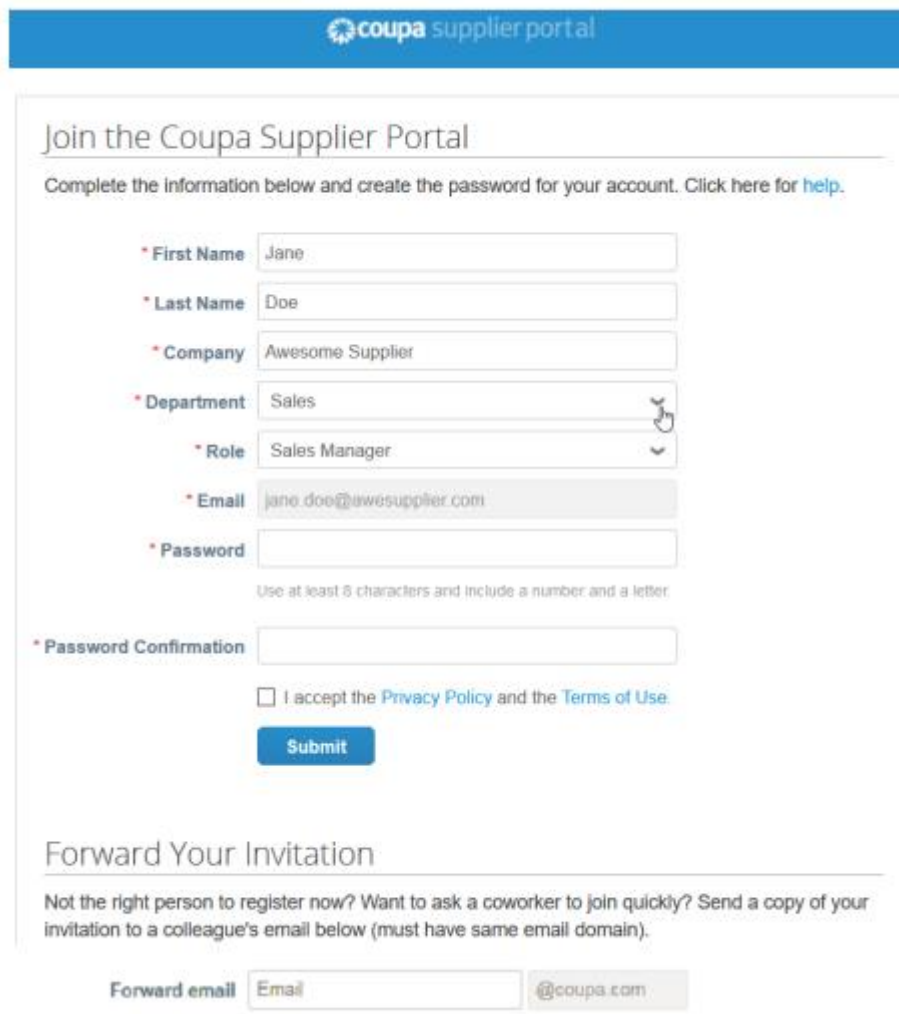
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1. Registering with our Supplier Portal (Coupa)

You have now been invited to register to the Coupa supplier portal. Click the link within the email and the “join the Coupa supplier portal” screen will appear

- Enter a password when prompted (min 8 characters required) and follow the prompts. You can now access all your companies purchase orders issued by NIISQ in one central location.



The screenshot shows the 'Join the Coupa Supplier Portal' registration form. At the top, there is a blue header with the Coupa logo and 'supplier portal' text. Below the header, the form title 'Join the Coupa Supplier Portal' is displayed. A sub-header reads: 'Complete the information below and create the password for your account. Click here for help.' The form contains several input fields: 'First Name' (Jane), 'Last Name' (Doe), 'Company' (Awesome Supplier), 'Department' (Sales), 'Role' (Sales Manager), 'Email' (jane.doe@awesupplier.com), and 'Password'. A note below the password field states: 'Use at least 8 characters and include a number and a letter'. There is also a 'Password Confirmation' field. Below the fields, there is a checkbox for 'I accept the Privacy Policy and the Terms of Use.' and a blue 'Submit' button. At the bottom of the form, there is a section titled 'Forward Your Invitation' with the text: '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).' This section includes a 'Forward email' field with 'Email' as a placeholder and a dropdown menu showing '@coupa.com'.

Once you have registered, you will be able to use the Coupa Supplier Portal (CSP) Link to log in:

- <https://supplier.coupahost.com>

2. How to view your orders, submit your invoices and credit notes

Once logged in, click on the Orders menu to:

1. View NIISQ purchase orders (POs)
2. Create an invoice against a PO
3. Create a credit note against a PO

2.1 View your NIISQ Purchase Orders:

- a. Select PO number to view details
- b. You can add comments which will be visible to NIISQ
- c. Acknowledge the PO(s) to let us know they are being actioned.
- d. View Order Lines allows you to report on all lines on the PO

2.2 Submitting your Invoice

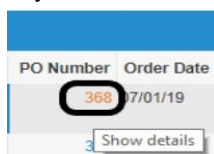
There are two options to create or 'flip' a PO into an invoice:

2.2.1 Via Coupa Supplier Portal (CSP)

When you receive a purchase order notification ready to invoice NIISQ simply login to Coupa and Click on the Orders Tab



- a. Click on the PO you've been sent:



- b. Click on the create invoice button at the bottom of the screen:



- c. Enter the invoice number, date, and attach the invoice:



- *Reminder – please be aware that future dated invoices will not be accepted, and the invoice will not be able to be submitted for processing.*

- d. Ensure the line prices match your invoice (ex GST) – adjust if it does not match:



- *Reminder please be aware only the GST or GST free tax codes will be accepted:*



- e. Click on Calculate at the bottom of the screen and submit if the total matches your invoice:



Great - you have now submitted your invoice directly to NIISQ's Accounts Payable team for streamlined payment, and no further action is required.

2.2.2 Via your email inbox

Submit your invoice direct from the PO email upon receipt of the PO in your inbox following the instructions below to fill in the mandatory information, as indicated with an asterisk (*):

- *Invoice # – generated from your own billing system
- *Invoice date – generated from your own billing system
- *Currency – nominate the applicable currency

- d. *Image scan – upload a copy of the invoice if applicable (JPG, PNG, TIFF, PDF, or GIF)
- e. Suppliers note – add additional note if applicable
- f. *Validate invoice, remit-to and ship-from details are correct
- g. Add additional details to the invoice lines if required (add line, comments, line level taxation, deleting a line item or deleting the invoice)
- h. Calculate
- i. Save as a draft
- j. Submit

Ensure that the invoice details you have entered match the invoice generated from your own billing system

2.3 Create a credit note against a PO

There are two options to create a credit note:

2.3.1 Via the orders menu using the (red coin icon)

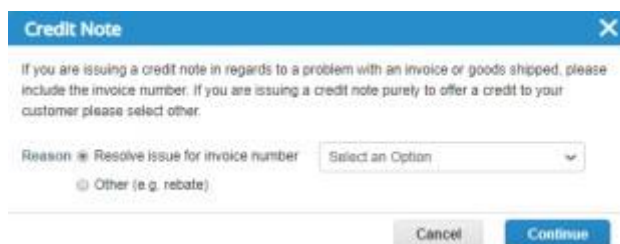
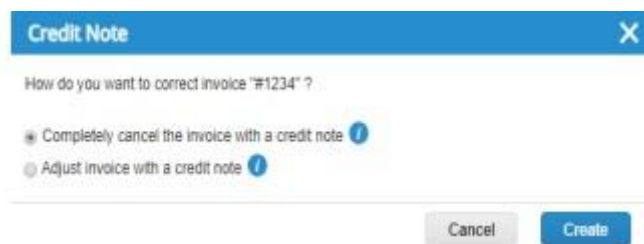
Click the red coin icon against the PO # and follow the instructions below to fill in the *mandatory information:

- a. *Credit note # – generated from your own billing system
- b. Credit note date – generated from your own billing system
- c. *Original invoice # – enter the original invoice number
- d. *Original invoice date – enter the original invoice
- e. *Image scan – attach a copy of the credit note
- f. Adjust PO lines as required to reflect credit note details

2.3.2 Via the invoice's menu using the “Credit Note” button

Click the credit note button to either;

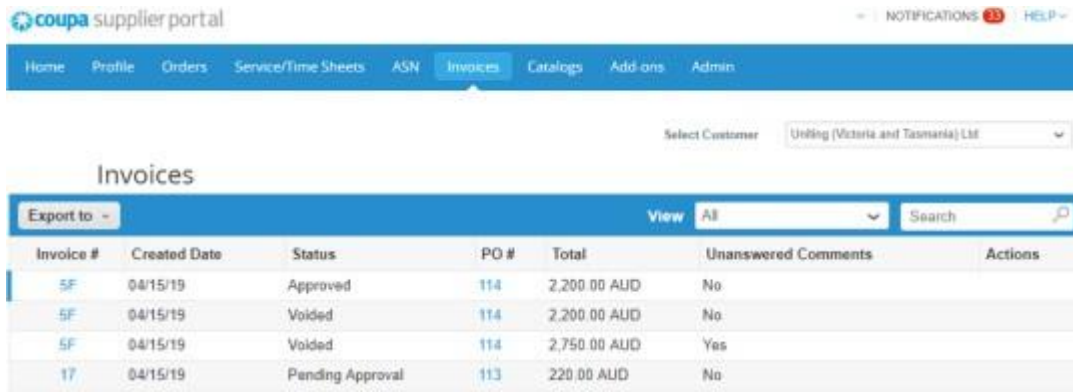
- a. Resolve a disputed invoice or
- b. Record a miscellaneous credit e.g., return of goods

3. Invoice management

The invoices menu allows you to:

- View invoice details and run reports
- View purchase orders and
- Create credit notes



Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
5F	04/15/19	Approved	114	2,200.00 AUD	No	
5F	04/15/19	Voided	114	2,200.00 AUD	No	
5F	04/15/19	Voided	114	2,750.00 AUD	Yes	
17	04/15/19	Pending Approval	113	220.00 AUD	No	

Invoice Status:

- Approved – approved for payment by NIISQ
- Draft – the invoice has been created but not yet submitted and can be edited
- Pending approval – awaiting approval for payment by NIISQ
- Processing – invoice submitted and received by NIISQ
- Disputed – invoice has been disputed by NIISQ
- Voided – invoice not valid (status of invoice once resolution of a disputed invoice)

4. Account Settings

The Account Settings menu (located under the username) allows you to:

- Manage your password
- Log out of NIISQ's Coupa supplier portal

The Profile option allows you to:

- Add or update details about your company (different to admin menu)

5. Account setup via Admin

The Admin menu allows you to:

- Invite your colleagues to use the portal via user (admin > users > invite users)



- E-Invoicing setup to enter your remit details and manage legal entity

Important: Before you submit an invoice for processing you will need to enter some remittance details. This is a one-time requirement only unless your details change in the future. To enter:


- Go to the admin menu options
- Select e-invoicing set up
- Click add legal entity

- d. Enter the legal entity name and the country, click on continue
- e. Enter the address details for sending remittance. Keep both check boxes ticked
- f. Enter your ABN
- g. Banking information (not required to be entered in the supplier portal)



Note: If your banking details change, please email accounts@niis.qld.gov.au to update

- h. Save and continue
- i. Click on next, or choose to add additional remit-to details
- j. Click on done, or choose to add additional shipping details
- k. Setup complete, press return to admin

6. Additional Information

- Notification preferences 
- To view details of your notifications and to manage them (turn them on/off), click on the notifications link to select your user preference (online, email or SMS)

Orders			
A new comment is received	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A new order is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

- Viewing details where multiple customer records are attached to a single login
- On the home page under “Latest Customers” click and select the customer record that you wish to view. If only one customer record is available, this selection option will not be available. 
- The default date format is set to MM/DD/YY. To update, hover over English US at the bottom of the home screen and select English (Australia) 
- Getting Help – Once you have successfully logged in, you can Take a Tour which is an online demonstration on how to use the portal

7. Login

To login to Coupa Supplier Portal (CSP)

<https://supplier.coupahost.com>

8. Support

If you require further information on the supplier portal, please visit our website <https://www.niisq.org/suppliers/> or contact serviceprovider@niis.qld.gov.au