

Coupa Supplier Portal

Quick Reference Guide



Overview

- What is CSP?
- How to register in CSP?
- Creating your account
- Set up your Legal Entity
- Your Home Screen
- Navigating Orders, Invoices, and Payments
- Creating invoices
- Account Settings and Notifications
- Admin
- Helpline

Coupa Supplier Portal (CSP)

- The CSP is a free tool for suppliers to easily transact with Pact Group using Coupa. This will replace the current process of submitting PDF invoices via email.
- You can manage content and settings including viewing of purchase orders, submitting invoices, checking the real time status of transactions, and more.
- The easiest way to register in the CSP is to ask Pact for an invitation by sending an email to suppliersupport@pactgroup.com.
- When you accept the invitation and create your account, you are automatically connected/linked to Pact.



Two ways to register in CSP

1. Invitation from Pact

You will receive an e-mail from our Coupa system asking you to join Coupa or forward the invitation to others within your organization.

The email will be sent to the primary 'account' email we have for you in Coupa. You may have previously provided this to Pact or if not this will likely be the same as the email we use to send you POs.

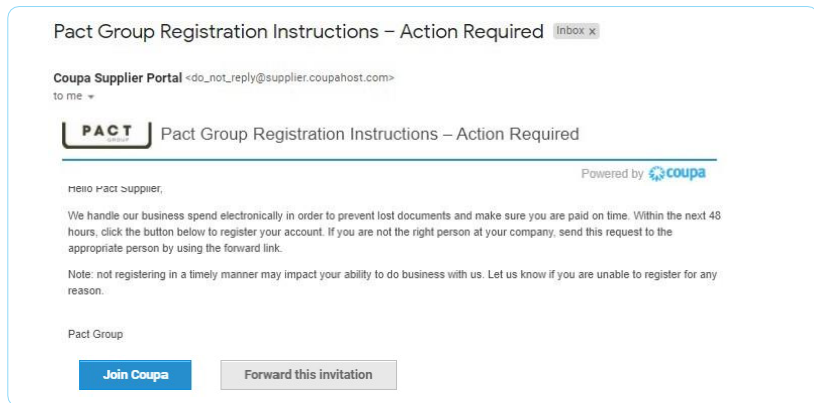
2. Self Registration

You can also set up your account ahead of the invitation from Pact, add multiple users, set up your login preferences, and update your profile more quickly at: <https://supplier.coupahost.com/sessions/new>

You will receive an email asking you to join Coupa or forward the invitation to others within your organization.

Once registered, let us know you're on the CSP by sending an email to suppliersupport@pactgroup.com and provide the email address you used to register. We need to ensure you are set up correctly in Coupa.

If you're already on the CSP with another Coupa customer, let us know by sending an email to suppliersupport@pactgroup.com and provide your CSP email address.





Create your business account

Pact Group is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Pact Group so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation


I accept the [Privacy Policy](#) and the [Terms of Use](#).

Get Started

- You will be directed to this page when you click "Join Coupa" in the email
- Start by entering and confirming a password and acknowledging your acceptance of Privacy Policy and the Terms of Use.

Complete the basic information required on this page then click Next.

There is a welcome message on the last page and an option to enhance your Coupa profile. You can also choose to do this at a later time.

P Pact Group Powered By 

Progress: Basics (active) | Payment | Coupa Profile

Tell us about your business ?

* Company Name
Your official registered company name

Website

* Country/Region

* Address Line 1

Address Line 2

* City

State

* Postcode

All done for now. On your first invoice with Pact Group, we will guide you through your legal entity setup.

Next



Welcome to the Coupa community. You're all set with Pact Group!

Make your company stand out in searches.
Find your next customers by updating your profile.

Enhance your Coupa profile



Show Up in Top Search Results



Share your Diversity



Get Invited to Sourcing Events

Set-up your Legal Entity

- You need to set-up your company information on the Legal Entity Set-up as a requirement by Coupa for E-invoicing.
- Please note that this will not overwrite your Supplier information on Pact Supplier Master Data.
- If you have changes in your company information such as Company Name, address, bank details, etc., please reach out to suppliersupport@pactgroup.com and we will ensure we update your records.

Tip:

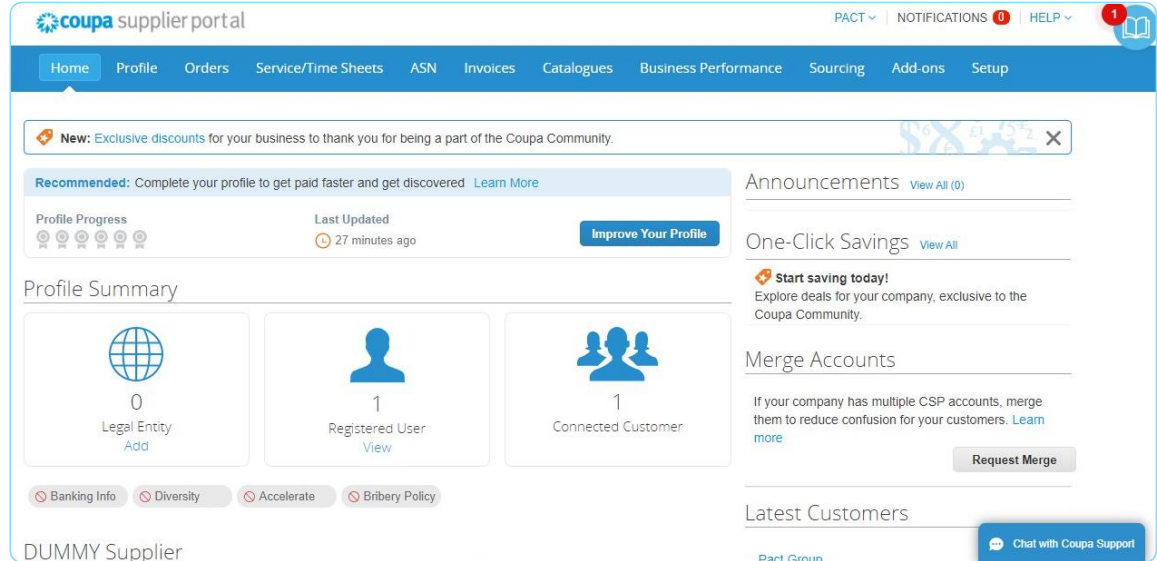
You can add legal entities also from the Profile edit page directly or when creating an invoice.



The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Setup' menu is expanded, showing 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' section is active, displaying a sidebar with options: 'Users', 'Merge Requests', 'Legal Entity Setup' (highlighted), 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Payment Preferences', 'Static Discounting', 'SFTP Accounts', 'cXML Errors', and 'SFTP Errors'. The main content area is titled 'Legal Entity' and contains the following text: 'Let's get your company set up for electronic invoicing! We'll walk you through what's needed and keep it as short as possible. The first thing you'll need to do is add a legal entity. Please note, if you are a European Company, or you have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-invoicing Setup to continue.' A 'Chat with Coupa Support' button is visible in the bottom right corner.

Your Home Screen

- Reviewing, acknowledging orders, submitting invoices, and communicating to with Pact is simple by navigating the tabs available on this page.
- Access to these tabs provides you with real time status of purchase orders and invoices with Pact.
- The purchase orders and invoices has a “Comment” section where you can communicate with Pact about each PO or invoice.



The screenshot displays the Coupa Supplier Portal home screen for a user named 'DUMMY Supplier'. The interface includes a top navigation bar with tabs for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. A notification bell icon shows 1 notification. A main banner highlights 'New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.' Below this, a 'Recommended' section prompts the user to 'Complete your profile to get paid faster and get discovered' with a 'Learn More' link and an 'Improve Your Profile' button. The 'Profile Progress' section shows 5 progress indicators, with the first one highlighted. The 'Last Updated' section shows '27 minutes ago'. The 'Profile Summary' section features three cards: '0 Legal Entity Add', '1 Registered User View', and '1 Connected Customer'. Below these are links for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The right sidebar contains sections for 'Announcements', 'One-Click Savings', 'Merge Accounts' (with a 'Request Merge' button), and 'Latest Customers'. A 'Chat with Coupa Support' button is located at the bottom right.

Orders


Selecting the “Orders” tab will take you to a screen where you can view purchase orders. This will provide a summary of all POs from Pact.

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 Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C000000544	2021/11/12	Issued	None	5 Each of Test Purchase Order	No	500.00 CNY		

The blue PO number can be clicked and it will open another screen (right) to view the entire PO where you can:

- **Review the full details of the PO**
- **Acknowledge PO** by checking the “Acknowledged” box
- **Create Invoice**
- **Request Change**, and
- **Send a message to the Pact** by typing on the Comments section

Purchase Order #C000000544

Status: Issued - Pending Manual
Order Date: 2021/11/12
Revision Date: 2021/11/12
Requester: Paulo Ramos
Email: paulo.ramos@pactgroup.com
Payment Term: ME70
Attachments: None
Acknowledged:
Assigned to:

Shipping

Ship-To Address: 广州经济技术开发区东区东环路13号
510530 广州 GD
China
Location Code: 2289
Attr: Paulo Ramos

Terms

Shipment Tracking

No delivery tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test Purchase Order	5	Each	100.00	500.00	0.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number
2021/11/19	None	None	None

Per page: 15 | 45 | 90

Total CNY 500.00

[Create Invoice](#) [Request Change](#) [Save](#) [Print View](#)

Comments

[Add Comments](#)

Enter Comment

Send comment notification to a user by typing @www.foo.com or @johnd@foo.com


Attachments [Add File](#) [URL](#)

Creating Invoices

Under Coupa suppliers submit their invoices using an online portal (rather than sending them in an email). Suppliers still of course create an invoice in their own system (called the “supplier invoice” and then when submitting that invoice to Pact (the “Pact invoice”) it is done using the method below.



Invoicing can be performed in two ways:

1. From the Orders tab, click the Gold Coins Icon under the Actions column

Click the  Action to Invoice from a Purchase Order

Export to View: All C000000544

Showing results for C000000544 x

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C000000544	2021/11/12	Issued	None	5 Each of Test Purchase Order	No	500.00 CNY		 


Create Invoice for PO #C000000544

Create Credit Note

2. When viewing a PO, select “Create Invoice” below the PO line details

Lines

Advanced Search Sort by Line Number 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Test Purchase Order	5	Each	100.00	500.00	0.00

Need By: 2021/11/19
Part Number: None
Manufacturer Name: None
Manufacturer Part Number: None

Per page: 15 | 45 | 90

Total CNY 500.00

Select Create Invoice

Create Invoice Request Change Save Print View

Creating Invoices

- Invoicing requires filling in the details marked by an *
- A scanned copy of the supplier invoice or any documents related to the transaction can be attached by selecting Add “File” under Attachments

Create Invoice Create

General Info

* Invoice #

* Invoice Date

Payment Term ME70

Date of Supply

* Currency

Delivery Number

Status Draft

* Image Scan No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

Supplier Invoice Issuer Name

From

* Supplier

* Supplier VAT ID

* Invoice-From Address

* Remit-To Address

* Ship-From Address

Invoices

- Clicking on the “Invoices” tab will display your Pact invoices.
- You can open any specific invoice or its associated purchase order by clicking on the blue hyperlinks.
- Approved invoices will be paid on the agreed payment terms with Pact

coupa supplier portal TEST | NOTIFICATIONS 5 | HELP 1

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Payments Business Performance Sourcing Add-ons

Setup

Invoices Invoices Lines Payment Receipts

Select Customer

Invoices

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 Invoice list page)

Create Invoices ⓘ

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
Jessie654	2021/11/8	Approved	C000000454	36,250.40 CNY	No		
Jessie543	2021/11/8	Disputed	C000000454	90,626.00 CNY	Yes	Quantity different from PO/Contract or Catalog	📄
Andy JC#1	2021/11/4	Approved	C000000454	54,375.60 CNY	No		
Test-198INV	2021/10/29	Approved	C000000198	565.25 CNY	No		

Chat with Coupa Support

Account Settings and Notifications

Selecting the “Notification Preferences” allows you to manage your notification settings for each function available in the CSP.

- Selecting the “Account Settings” allows you to manage your log in details and information.
- You can change your name, e-mail address and password.

My Account Settings

Settings

- Notification Preferences
- Security & Two-Factor Authentication

User Details

* First Name

* Last Name

* Email

Department

Role

Save

Change Password

* Current Password

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

Save

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Settings

- Notification Preferences
- Security & Two-Factor Authentication

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Business Performance

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Catalogues

Catalogue about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
New comment received	<input checked="" type="checkbox"/> Online	<input checked="" 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

Admin

coupa supplier portal

PACT | NOTIFICATIONS 0 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup Connection Requests

Admin Users

Invite User

Users	Permissions	Customer Access
<p>Pact Supplier pactbuytest@gmail.com Status: Active</p> <p>Edit</p>	<p>ASNs Admin Business Performance Catalogues Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing</p>	<p>Pact Group</p>

Chat with Coupa

- Under Setup, selecting the “Admin” will take you to a screen where you can administer the users, requests, and remit to addresses.
- Selecting “Invite Users” will provide functionality to add other users in your company to utilise the CSP. You can set their permissions or restrict their access from other functionalities. You can also transfer the administrative role to another user in your company.

Need help?

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Payments, Business Performance, Sourcing, and Add-ons. Below this is a secondary navigation bar with 'Setup' and an upward arrow. A notification banner at the top right indicates 'TEST', 'NOTIFICATIONS 0', and 'HELP'. A main announcement states: 'New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.' Below this, a 'Recommended' section suggests completing the profile. The 'Profile Progress' section shows five progress indicators and a 'Last Updated' timestamp of '1 day ago', with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '1 Legal Entity View', '1 Registered User View', and '1 Connected Customer'. At the bottom of the profile summary are tags for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. On the right side, there are sections for 'Announcements', 'One-Click Savings', and 'Merge Accounts'. The 'Merge Accounts' section includes a 'Request Merge' button and a 'Chat with Coupa Support' button. A blue arrow points from the 'Request Merge' button to the 'Chat with Coupa Support' button.

- Send us an email at suppliersupport@pactgroup.com, or
- Initiate a chat with Coupa Support

 [For a complete CSP Guide, click below!](#)
[Supplier Portal Admin and User Guide](#)

Thank you

