

Coupa Supplier Portal Tutorial

Basic operation

2024.04

Mitsubishi Heavy Industries, LTD

IMPORTANT:

This tutorial document covers only the basic functionalities of Coupa Supplier Portal. Should you have any inquiries or encounter topics not covered in the tutorial, we encourage you to reach out to the MHI affiliate company that invited you to the training.

Understanding this manual:

To better follow this guide, you may want to get yourself familiar with some indicators that is used.

LEGEND	DESCRIPTION
	A cover to conceal critical information in the sample user interface.
	An additional information, that may help you understand better the instruction.
	Emphasize the area in user-interface that you may need to set your attention to.
	An index to lead you to a particular instruction, usually found if there are 2 or more instruction in same user-interface.
	An Indicator usually pointing to the whole UI image to provide an general instruction.
	An Indicators where an instruction is referred to, applied to a specific area of the user-interface.
	Indicates a user-interface transition, from the current interface to the next once an action is made.
	Found inside an instruction text-box to indicate an object (<i>Button, Tab, Checkbox, etc.</i>) in the interface. Typically, the name of object is written inside the brackets.



Note:

Coupa is updated regularly, so in-case you encounter a discrepancy between this manual from the actual operation please let us know.

On bottom-right side of each slide, you may find a “Menu” tab, click to this tab to go to Menu page.



You can go to specific topic by clicking on the tile.

CSP Overview

Process
Overview

About this
manual

CSP General Operations

Initialize CSP

Purchase
Order

Invoice

Initial Log-in

Confirm PO

Create Invoice

Setting MFA

Acknowledge
PO

Create Credit
Note

Adding Users

Payment
Status

Remit to
Address

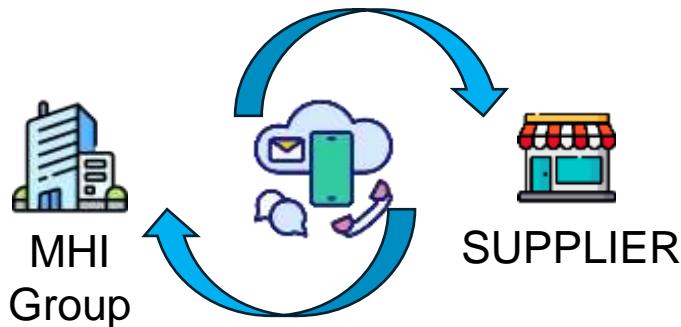
Back

Menu

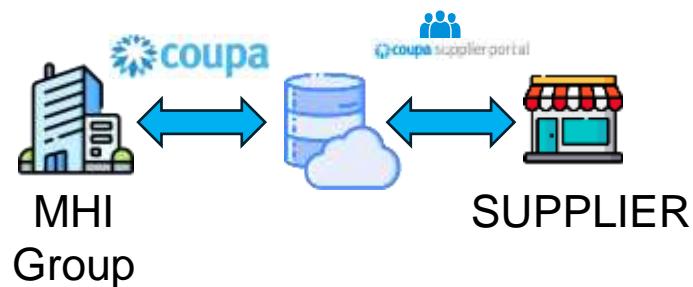
1.CSP Overview

Coupa is a cloud-based platform that simplifies business-to-business (B2B) transactions between companies and their suppliers.

Conventional B2B Transaction



Coupa

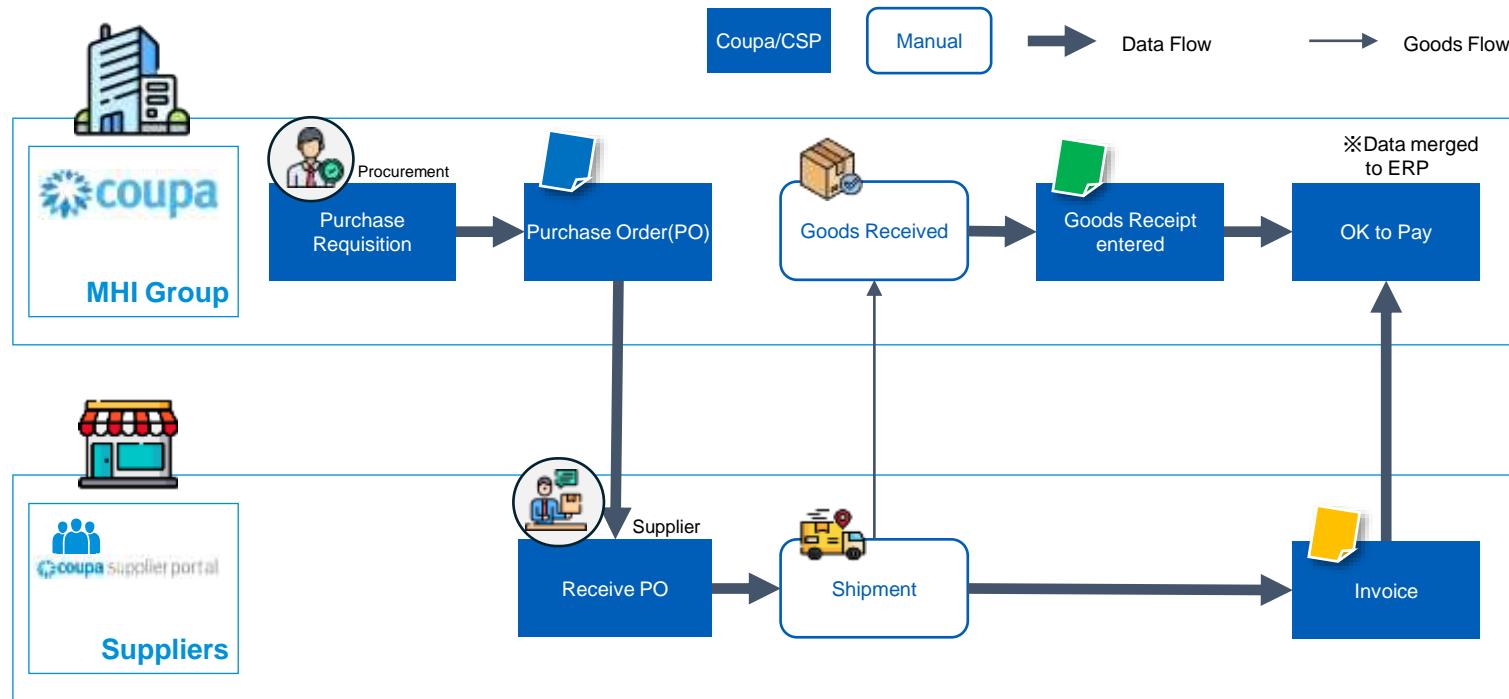


Conventional B2B transactions are like a maze of emails, paper forms, and manual processes, leading to slow approvals, errors, and limited visibility. Coupa cuts through the maze with automation, offering a streamlined, transparent, and faster experience for both buyers and suppliers.

Process Overview (2/2)

Receive PO, Advanced Ship Notice, and Invoice processing will be done through CSP (Coupa Supplier Portal)

※ Actual payment process, based on Coupa payment information, will not change.



Let's learn about.



- Initializing CSP
- Receive and review Purchase Orders
- Send Invoices and Credit Notes
- Manage your Company Profile
- Work collaboratively on the platform

Reminder for suppliers.

- Suppliers must provide only one e-mail address for the creation of the CSP account.
- To register, suppliers will receive an invitation e-mail.



Useful link:

<https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers>

Menu

2.CSP General Operations

Table of Contents

	Topic:	Detail:
2-1	Initialize CSP	Initial Login
		Setting Multi Factor Authentication
		Adding Users
		Adding a Remit to Address
2-2	Receiving POs	To confirm POs in CSP
		To Acknowledge POs
2-3	Remit to Address	Creating a Remit to Address
2-4	Invoice	Create an Invoice
		Create a Credit Note
		Check Payment Status
		Coupa Chat Support
2-5	Helpdesk	

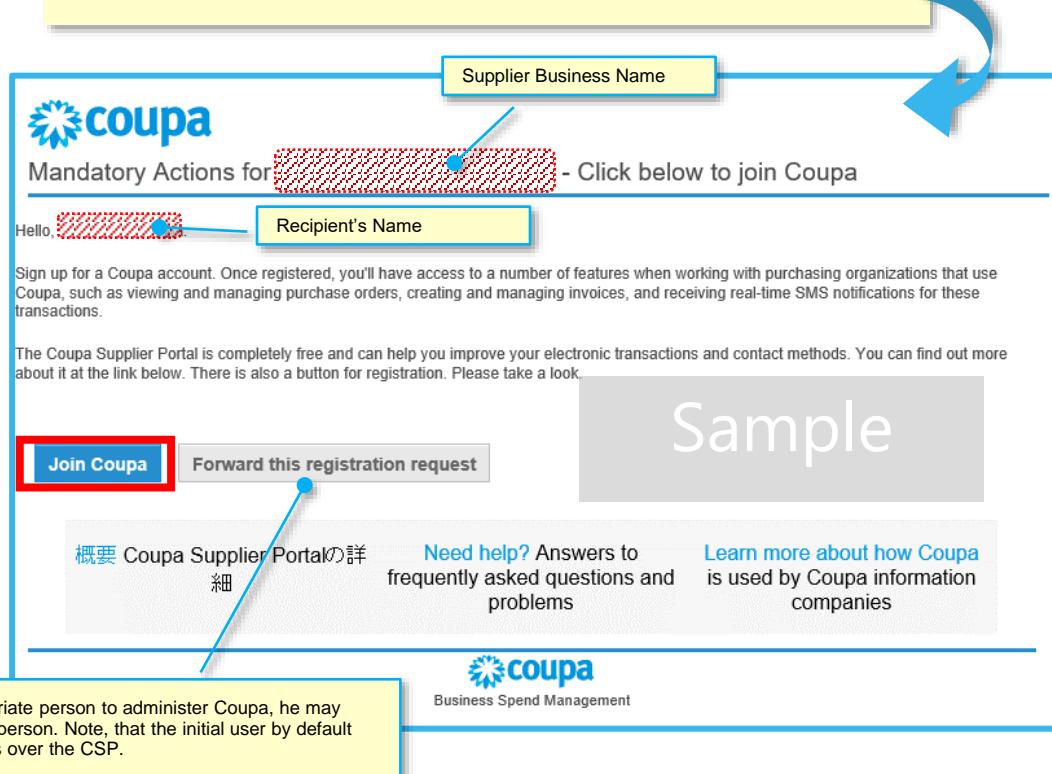
Initialize CSP

- Initial Login
- Adding Users
- Adding a Remit to Address

Invitation E-mail

An email will be sent to the supplier via CSP based on the survey collected in advance. Emails from CSP will be sent from @supplier.coupahost.com. Suppliers are required to click the 「Join Coupa」 button from the email to proceed with user registration. By default, this account serves as the admin account for your company.

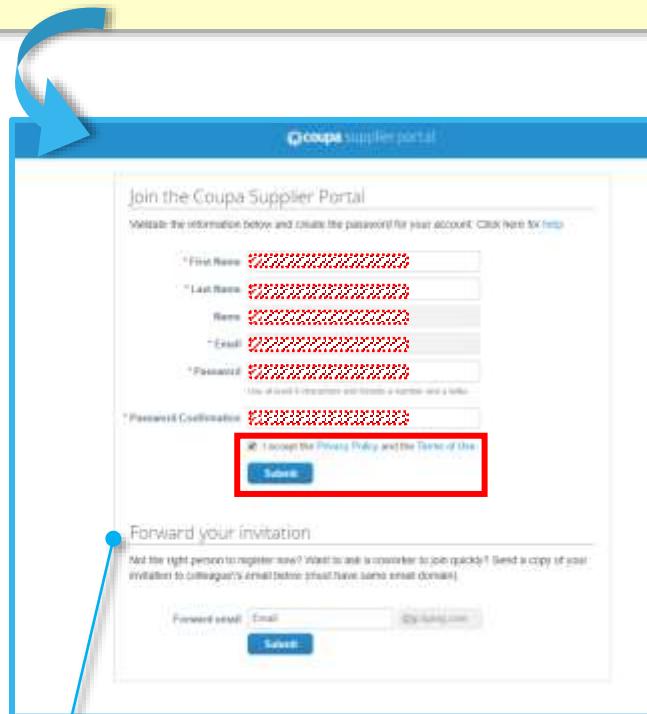
The invited user will receive an invitation email.



Initial Login (2/3)

Registration Page

After setting the password on the initial login page, suppliers must agree to the policy and terms and conditions before submitting their information.



Join the Coupa Supplier Portal

Maintain the information below and create the password for your account. [Click here for help](#)

* First Name:

* Last Name:

Item:

* Email:

* Password:

* Password Confirmation:

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

Submit

Forward your invitation

Not the right person to register now? Want to make it easier to sign up? Send a copy of your invitation to a colleague's email before they have their own email domain!

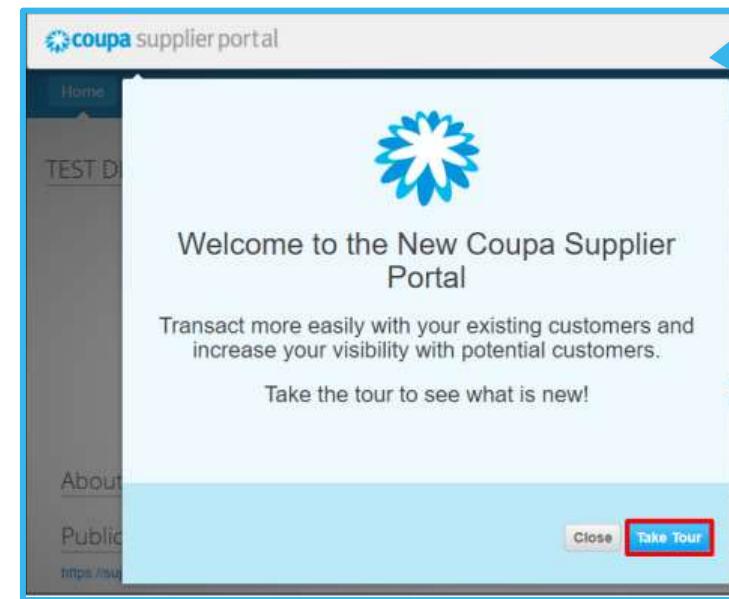
Forward email: [Copy and paste](#)

Submit

If the recipient is not the appropriate person to administer Coupa, he may forward the invitation to the right person. Note, that the initial user by default will have the administrator rights over the CSP.

Take Tour

Upon submission, the CSP dashboard will open. Coupa provides a tour of the new site, which can help users better understand the features offered by CSP.



For additional information while using the CSP, click **Help > Online Help**. Here, you will find helpful topics and definitions for using the supplier portal. You can also click **Help > Help Tour** to take the tour again

NOTIFICATIONS 9 **HELP**

Menu

Log-In

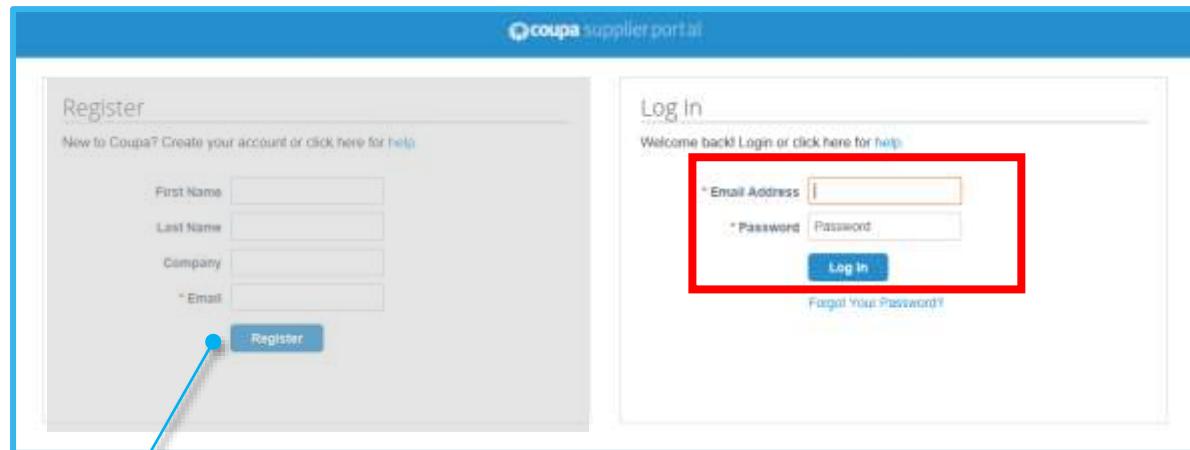
After the initial login, the user can use their registered email and password to log into Coupa. It is advised that the supplier bookmarks the CSP page. (<https://supplier.coupahost.com/>)



Login URL:

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

It is advised that the supplier bookmarks the CSP page.

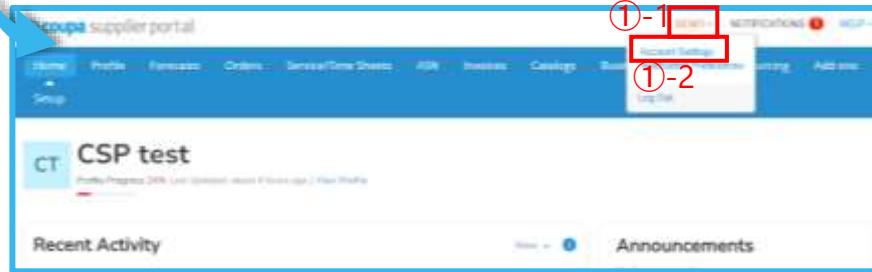


※An option to register a login is displayed in the CSP, but will not be used.

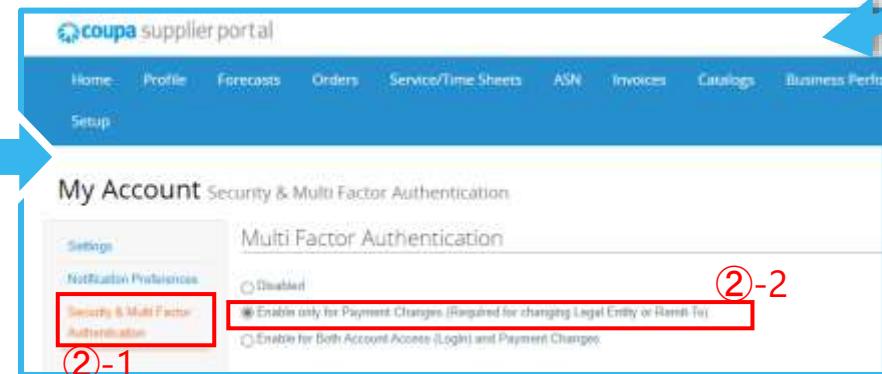
Multi Factor Authentication

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」.
Use your smartphone or mobile phone to enable two-factor authentication.

①-1 Place the cursor on the account name on the upper right of the screen and click ①-2「Account Setting」.



②-1 Click 「Security & Multi Factor Authentication」 → ②-2「Enable only Payment Changes (Required for Legal Entity or Remit-To)」

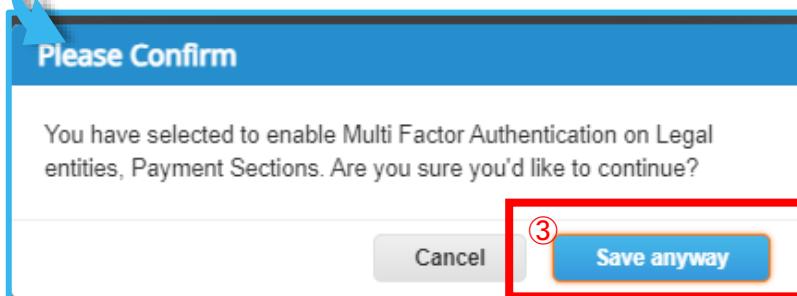


※Pop-up may be displayed to encourage registration of the application for multi factor authentication. Please click on [×] or cancel and close it and proceed to ②

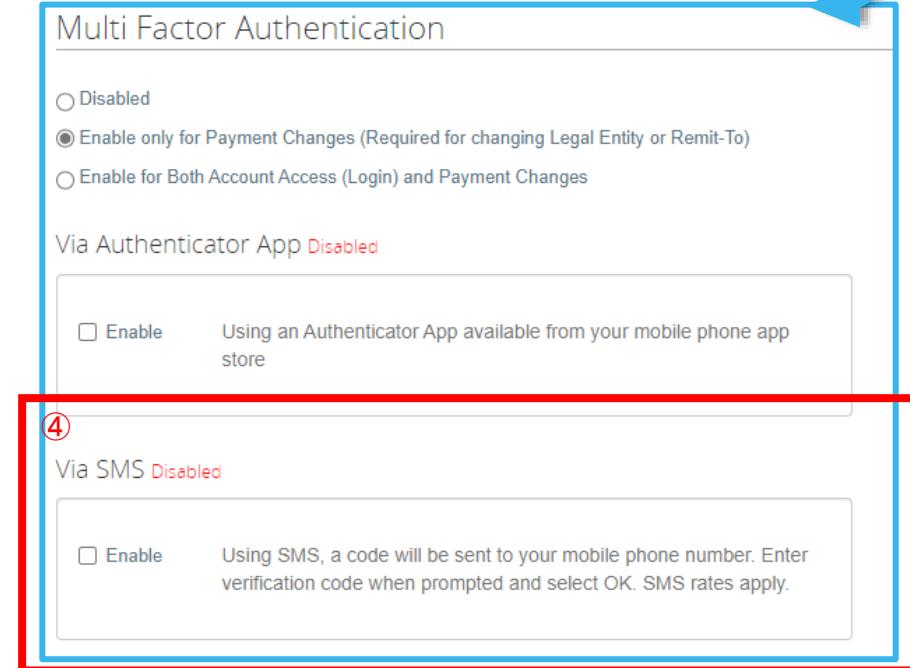
Setting Multi Factor Authentication (2/4)

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」. Use your smartphone or mobile phone to enable two-factor authentication.

③ When the following screen is displayed, click 「Save anyway」.



④ Select「Via SMS」, and then click 「Enable」.



Setting Multi Factor Authentication (3/4)

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」.
Use your smartphone or mobile phone to enable two-factor authentication.

⑤ Enter the phone number of the mobile phone/smartphone that can receive SMS (short-mail) in the popup window of [Verify your mobile phone], and then click 「Next」.

Verify your mobile phone

To enable Multi Factor Authentication via SMS, a code will be sent to your mobile phone number. Enter the verification code when prompted and select OK

Mobile Phone

Invalid format. Example: +81 80-1234-XXXX

Italy (Italia) +39
Japan (日本) +81
Netherlands (Nederland) +31
South Africa +27
Spain (España) +34
Sweden (Sverige) +46
Switzerland (Schweiz) +41

⑤-1

⑤-2

Cancel

Next

reCAPTCHA

- For phone numbers in Japan, click the default 「+1」 and select 「Japan(日本) +81」
- Please omit the 「0」 at the beginning of the phone number.
Example : 080-1234-XXXX⇒ +81 80-1234-XXXX
※Hyphenation in the middle is automatically entered.

⑥ SMS is sent to the entered mobile phone.
Enter the six-digit code that you received on the mobile phone/smartphone SMS and press「OK」.

Multi Factor Authentication

Enter the validation code that we sent to: +81 80-1234-XXXX

⑥-1

⑥-2

* Code

Cancel

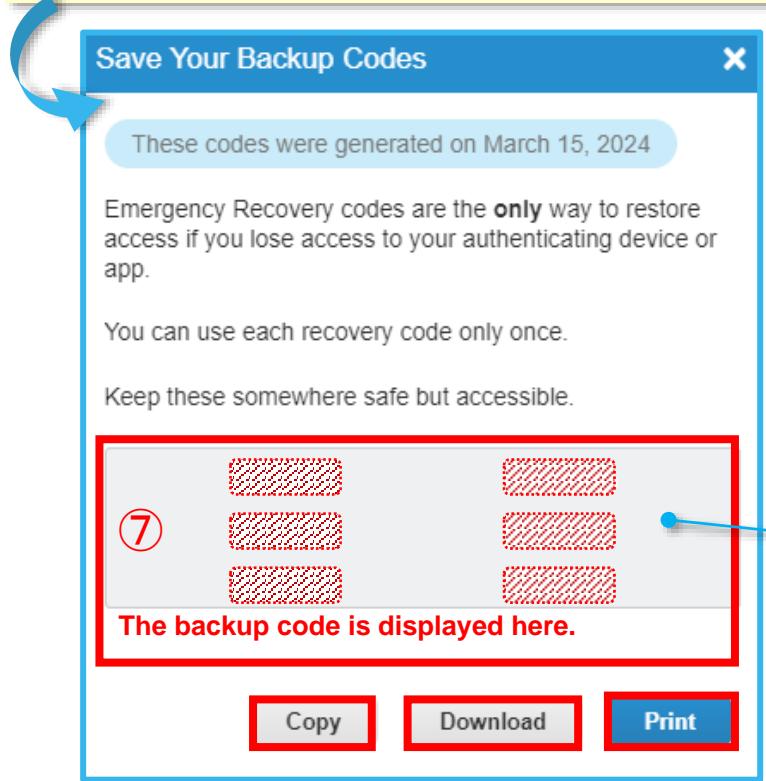
Resend Code

OK

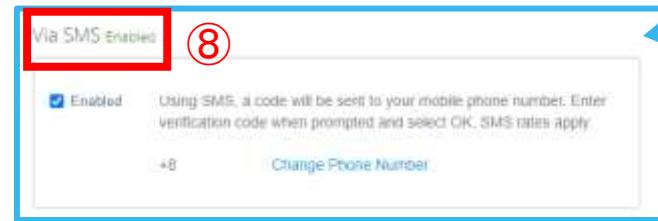
A 6-digit validation code will be sent to your registered mobile phone/smartphone via SMS (short message).

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」. Use your smartphone or mobile phone to enable two-factor authentication.

⑦ The backup code is displayed. Be sure to write down the backup code as an emergency recovery code in case the authentication code is not delivered due to lost phone or changed phone number.



⑧ When the message 「Via SMS Enabled」 is displayed, the setting is completed.



Be sure to write down the backup code in the figure on the left and close the screen with ×



Note:

- You can paste in text by clicking 「Copy」
- By clicking 「Download」, you can save it as CSV.

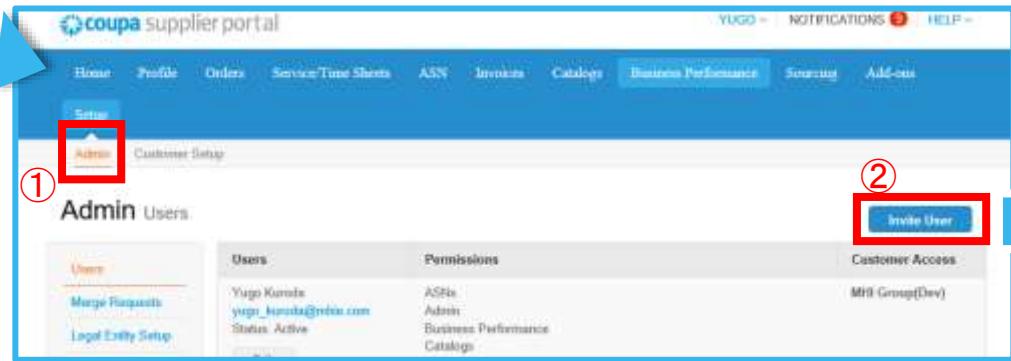
※Do not use the Print button

Adding Users (1/3)

Add Users

In CSP, you can add users and assign them roles, including account administration. It gives you an option to set up multiple users accessing different functionalities of the same supplier portal.

Navigate to Admin section. From the ①「Admin」Tab, Click on the ②「Invite User」button.

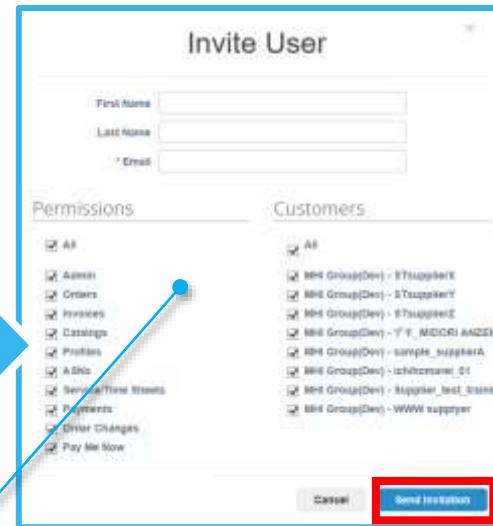


① Admin

② Invite User

Field Name	Description
First Name	First Name of invitee
Last Name	Last Name of invitee
Email	Email of invitee
Permissions	Permissions to be set for each user. Admin / Orders / Invoices / Catalogs / Profiles / ASNs ※Advanced Ship Notice
Customers	Customer to provide service to

For more information about these fields, please refer to the table below.



First Name:

Last Name:

Email:

Permissions

All

Admin

Orders

Invoices

Catalogs

Profiles

ASNs

Sales/Time Sheets

Payments

Order Changes

Pay Me Now

Customers

MHI Group(Dev) - MHI supplier

MHI Group(Dev) - STsupplier

MHI Group(Dev) - STsupplierE

MHI Group(Dev) - Y.F. MIDORI MACHIN

MHI Group(Dev) - sample_supplierA

MHI Group(Dev) - zh_supplier_ea

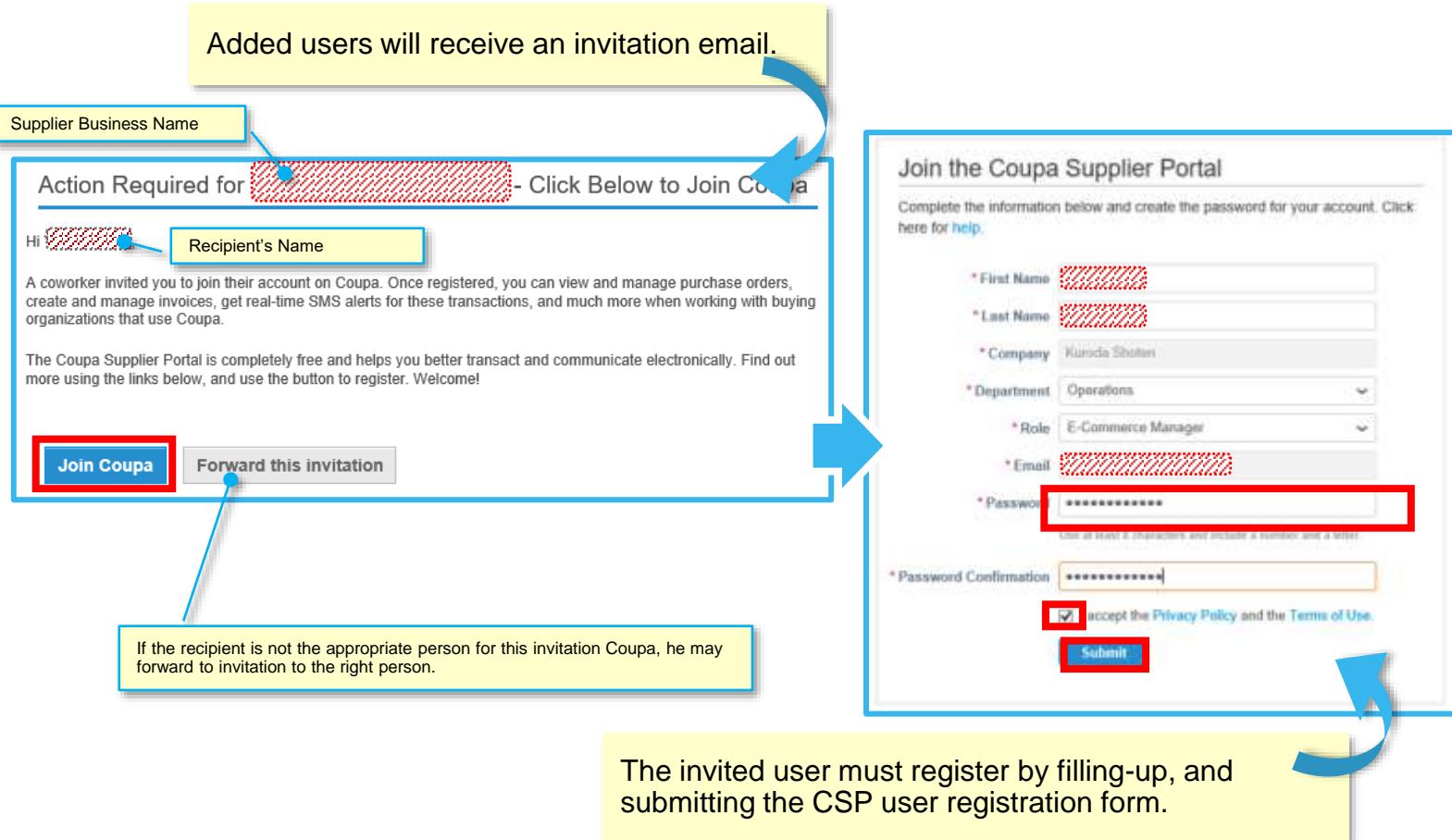
MHI Group(Dev) - Supplier_test_0000

MHI Group(Dev) - WWW supplier

Cancel Send Invitation

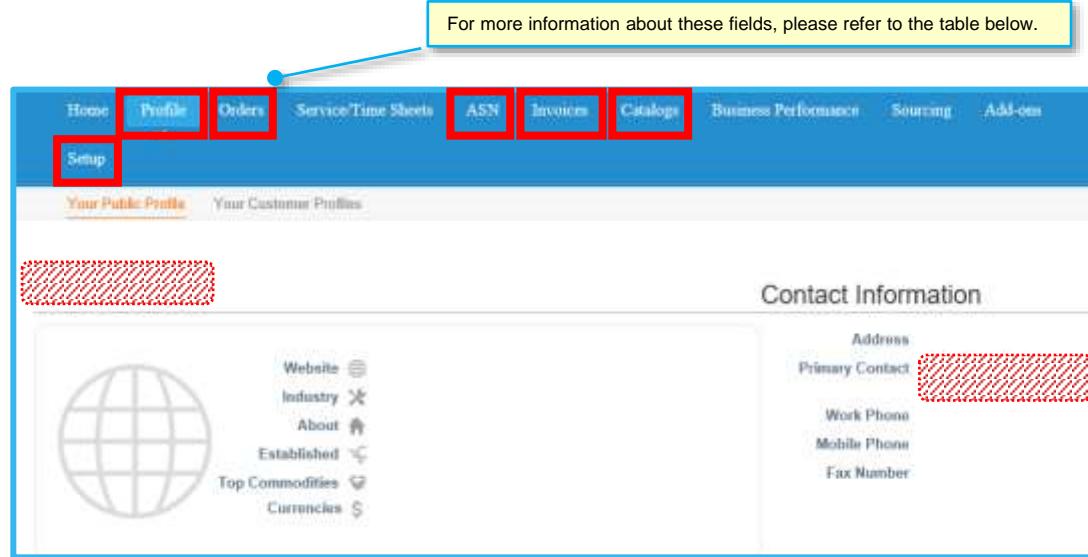
Fill and select the required information, then proceed by clicking 「Send Invitation」 button .

Adding Users (2/3)



Adding Users (3/3)

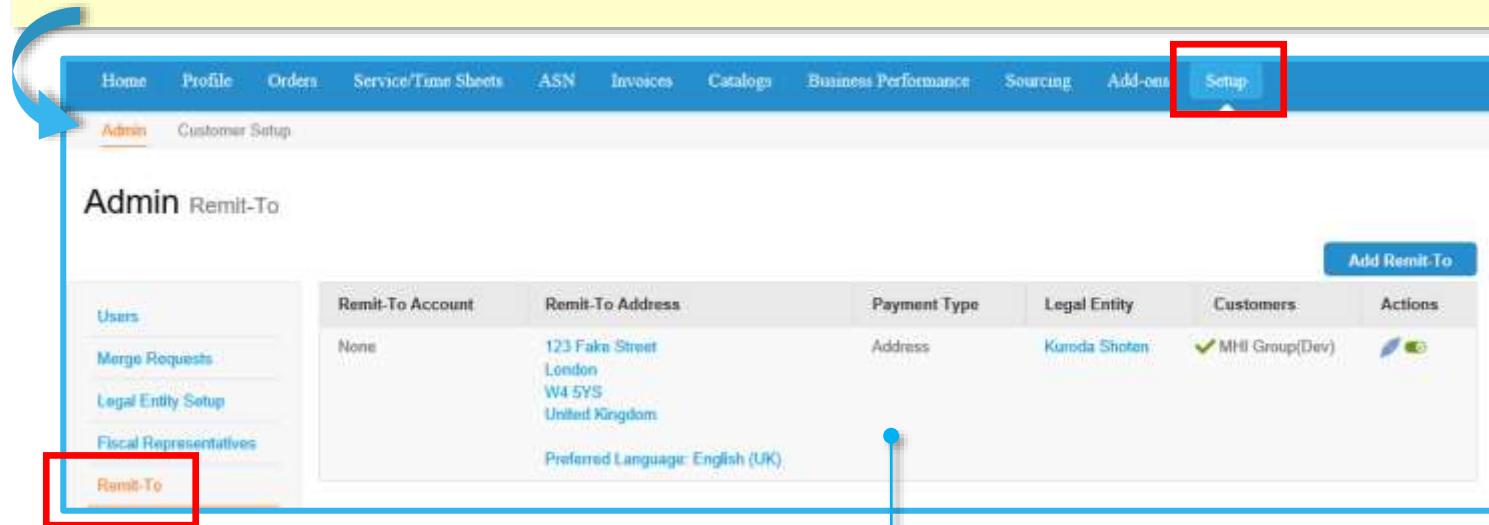
User Main Menu. To access a CSP function, click on the relevant tab on the main menu at the top of the CSP main page. Refer to this table for additional information about the fields.



Tab Name	Description
Setup	Access to 'Setup' tab. To administrate CSP users, payment addresses,
Orders	Access to 'Orders' tab. To view purchase orders from the customer.
Invoice	Access to 'Invoices' tab. To manage invoices to be created for the customer.
Catalogs	Access to 'Catalogs' tab. To manage catalog items. Out of scope for MHI
Profiles	Access to 'Profile' tab. To manage profile to be shown to the customer. Out of scope for MHI
ASNs	Access to 'ASN' tab. To manage ASN (Advanced Ship Notice)

Adding a Remit To Address

CSP includes remit-to addresses as part of electronic invoice compliance. You must add a remit to address before you can create an invoice



Admin Remit-To

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	123 Fakre Street London W4 5YS United Kingdom	Address	Kuroda Shoten	<input checked="" type="checkbox"/> MHI Group(Dev)	 

Add Remit-To

For more information about these fields, please refer to the table below.

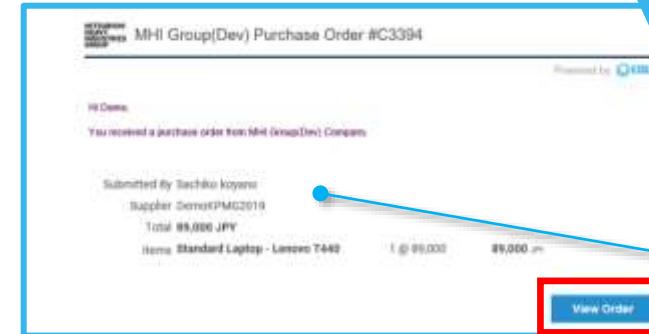
Field Name	Description
Remit to Name	Remit To Name A unique easily identifiable user-friendly name.
Remit to Code	Use this field to tie your CSP remit-to address with the corresponding address in your ERP.
Address Line 1,2	Standard Address Information
City	Name of the City
Postal Code	Standard Postal Code
Country	Country of Origin
Tax Country	Determines the origination country for tax purposes.

Purchase Order

- To confirm POs in CSP
- To acknowledge POs

Receiving PO

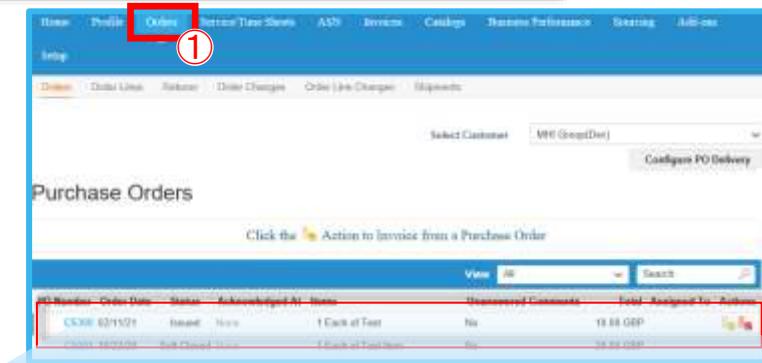
Orders from MHI group will be visible in the PO tab of CSP.



When a Purchase Order is made, you as a supplier will receive an e-mail about the PO. You may click on the 「View Order」 button, to be directed to CSP and fulfill the order.

PO details included in body of email notification

① In CSP, Select 「Orders」 tab to view list of orders.



Purchase Order #C5300

Status: Issued - Sent via Email
Order Date: 02/11/21
Revision Date: 02/11/21
Requester: Yogo Kuroda
Email: yogo_kuroda@mhi.com
Payment Term: GBP3
Attachments: None
Acknowledged:
Assigned To: None

Lines

Type	Item	Qty	Unit	Price	Total	Invited
Test	Test	1	Each	10.00	10.00	0.00

②

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C3394	02/11/21	Issued	None	1 Each of Test	No	10.00 GBP		
C5300	02/11/21	Sub-Closed	None	1 Each of Test	No	10.00 GBP		

② Click 「PO Number」 to view PO details.

Menu

Acknowledge (confirmation of receipt) the received purchase order

The receipt of the purchase order can also be checked on MHI group. Please confirm the receipt of the purchase order as much as possible. If the delivery date is not met, or if the delivery date is changed, ask the requester to update the delivery date.

① → ② Toggle ON the 「Acknowledged」 checkbox in the purchase order details

Purchase Order #MHI-C10883

General Info

Status: Canceled - Sent via Email
Order Date: 05/19/23
Revision Date: 05/19/23
Requester: Email
Payment Term: 2001+
Affiliation Name: None
Attachments: T-サプライヤー コメント sample
Acknowledged: (1)
Assigned To: None

Shipping

Ship-To Address: Location Code: A01
Term: None

Shipment Tracking: No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total
1	1 Each	100	100	100	100

「Order Acknowledged」 will be displayed, and the information will be relayed to MHI through Coupa.

Purchase Order #MHI-C11038

order acknowledgement

General Info

Status: Issued - Sent via Email
Order Date: 05/14/23
Revision Date: 05/14/23
Requester: Email
Payment Term: 2001+
Affiliation Name: None
Attachments: T-サプライヤー コメント sample
Acknowledged: (2)

Shipping

Ship-To Address: Location Code: A01
Term: None

Shipment Tracking: No shipment tracking.

Purchase Orders

Click the  Action to Invoic from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	None
C5001-N01021	05/14/23	Issued	Unacknowledged	Comments: 1 Each of Test
C5001-N02023	05/14/23	Self-Closed	None	Comments: 1 Each of Test Item

After acknowledgment, and you review the Purchase Order list, you will noticed that the 「Acknowledged At」 column, will contain the acknowledgment date.

PO Number	Order Date	Status	Acknowledged At
MHI-C11038	05/14/23	Issued	05/14/23

After acknowledgment, and you review the Purchase Order list, you will noticed that the 「Acknowledged At」 column, will contain the acknowledgment date.

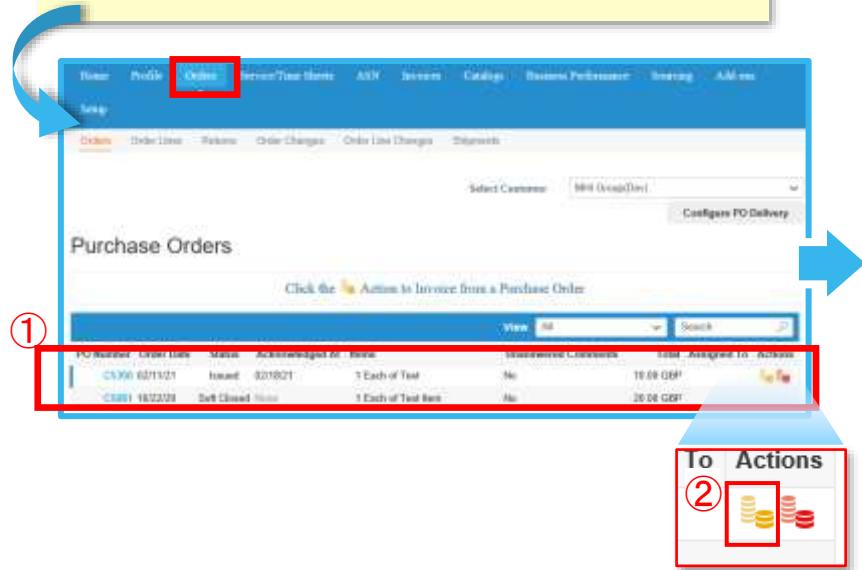
Invoice

- Create an Invoice
- Create a Credit Note
- Check Payment Status

Create an Invoice

Create an Invoice

Invoices will be sent through the CSP



Home Profile **Orders** Order Type Items A&W Services Catalog Business Performance Training Admin

Orders Order Lines Returns Order Changes Order Line Details Payments

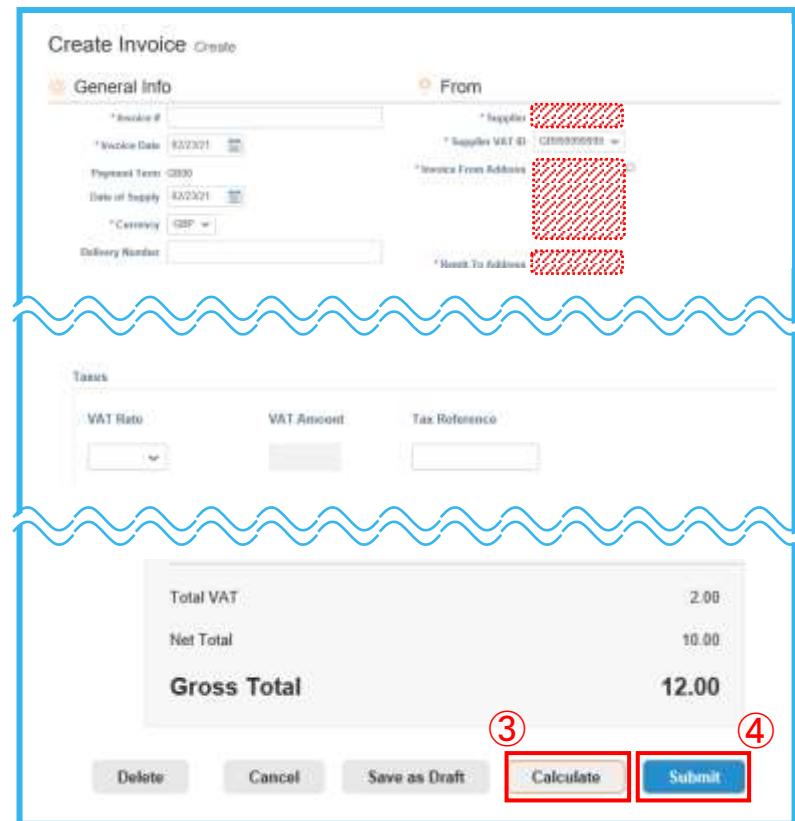
Select Customer: MHI (Oxford) Ltd Configure PO Delivery

Purchase Orders

Click the  Action to invoice from a Purchase Order.

PO Number	Order Date	Status	Acknowledged On	Items	Measurement Category	Total Assigned To	Actions
PO001 02/02/2021	Issued	02/02/2021	1 Each of Test	No	10.00 GBP		
PO001 18/02/2021	Soft Closed	1 Each of Test Rev	No	20.00 GBP			

To Actions



Create Invoice 

General Info

From

* Invoice #

* Invoice Date 02/02/2021

Prepared Term: G300

Date of Supply 02/02/2021

* Currency: GBP

* Supplier:

* Supplier VAT ID:

* Invoice From Address:

* Invoice To Address:

Taxes

VAT Rate: 20.00

VAT Amount: 2.00

Tax Reference: 12.00

Total VAT: 2.00

Net Total: 10.00

Gross Total: 12.00

Delete Cancel Save as Draft **Calculate** **Submit**



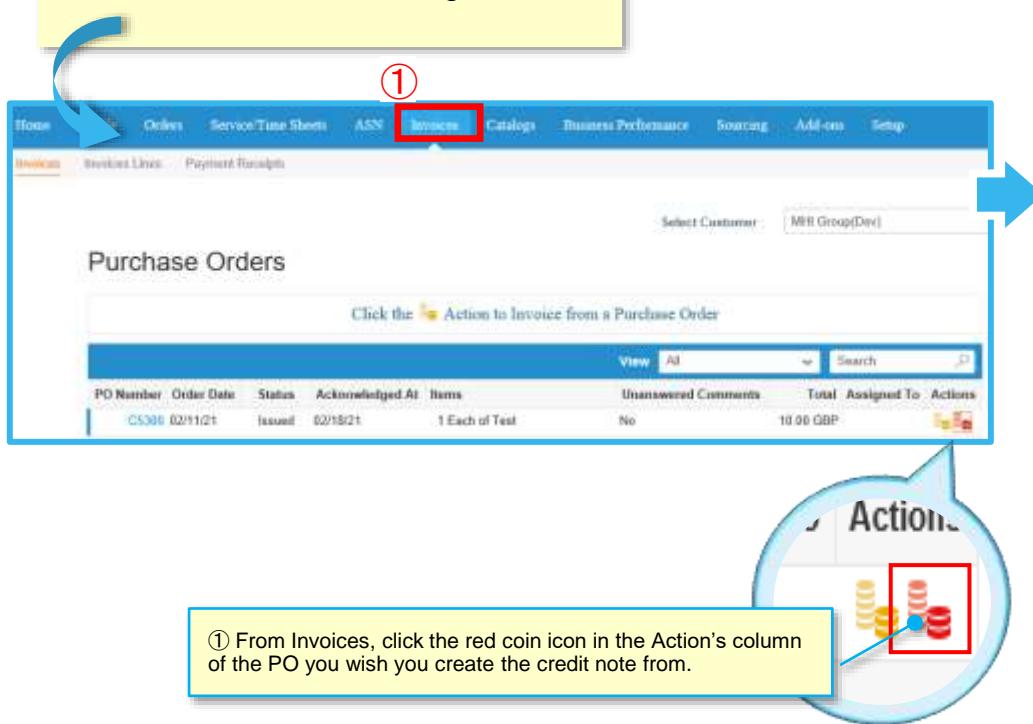
Note:

1. Creating of invoices is processed per PO.

- ① From Purchase Orders, click the gold coin  icon in the Action's column of the PO you wish you create an invoice from.
- ② Fill out any required fields marked with an asterisk (*).
- ③ Use the Calculate button to see invoice totals prior to submitting.
- ④ Click Submit. If you want to save a draft now, and continue to work on the form later, click Save as draft instead.

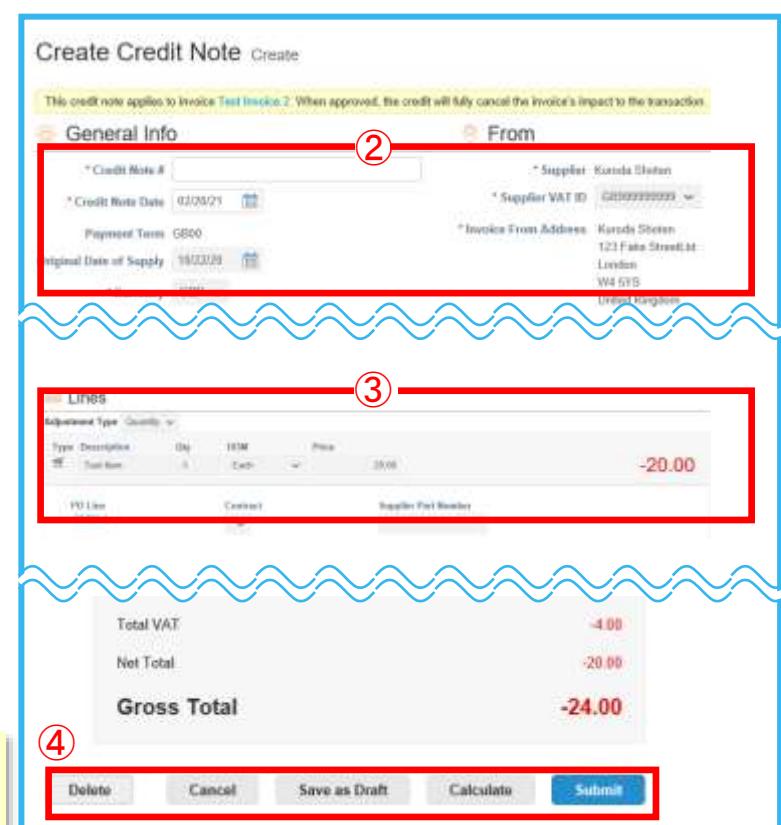
Create a Credit Note

To refund a credit note using CSP



① From Invoices, click the red coin icon in the Action's column of the PO you wish you create the credit note from.

- ① The Credit Note is created based on the original invoice
- ② You must input the Credit Note N° provided by your system.
- ③ Select the type of adjustment to be done and adjust the Credit Note accordingly.
- ④ Click on Calculate to Adjust the Credit Note. Then it can saved as a draft, deleted or submitted..



② From

③ Lines

④ Save as Draft



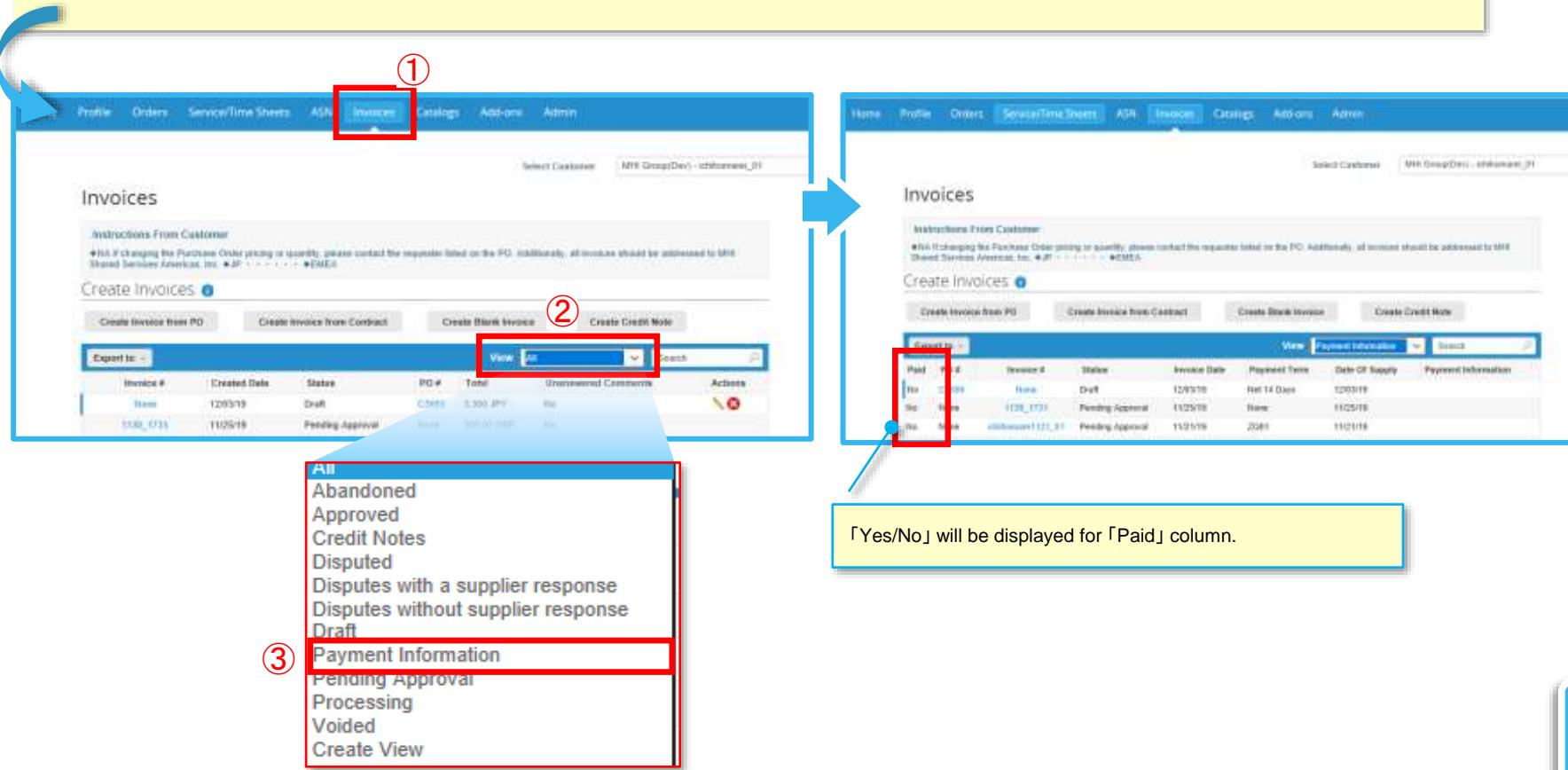
Note:

1. The Credit Note amount must be a negative value.
2. To Cancel an invoice, the same procedure is applied

Check Payment Status

Payment status can be confirmed for each purchase order.

From the ①「Invoices」, Select ②「View」down box, then click on ③「Payment Information」.



The screenshot illustrates the process of checking payment status. It shows two views of the 'Invoices' screen. The left view shows the 'View' dropdown menu open, with 'Payment Information' highlighted. The right view shows the 'Payment Information' table, where the 'Paid' column displays 'Yes/No' for each invoice.

Invoices

Instructions From Customer:
•MHI is changing the Purchase Order pricing to quantity, please contact the requester listed on the PO. Additionally, all invoices should be addressed to MHI Shared Services America, Inc. •JP - •US - •EMEA

Create Invoices

View **②** **③** Search

Invoice #	PO #	Invoice #	Status	Invoice Date	Revised Term	Date of Supply	Payment Information
1102_0731	120518	None	Draft	2018-12-05	Net 14 Days	12/20/18	
		1102_0731	Pending Approval	2018-12-05	None	11/05/18	
		1102_0731	Pending Approval	2018-11-20	2018-11-20	11/01/18	

① Invoices

② View

③ Payment Information

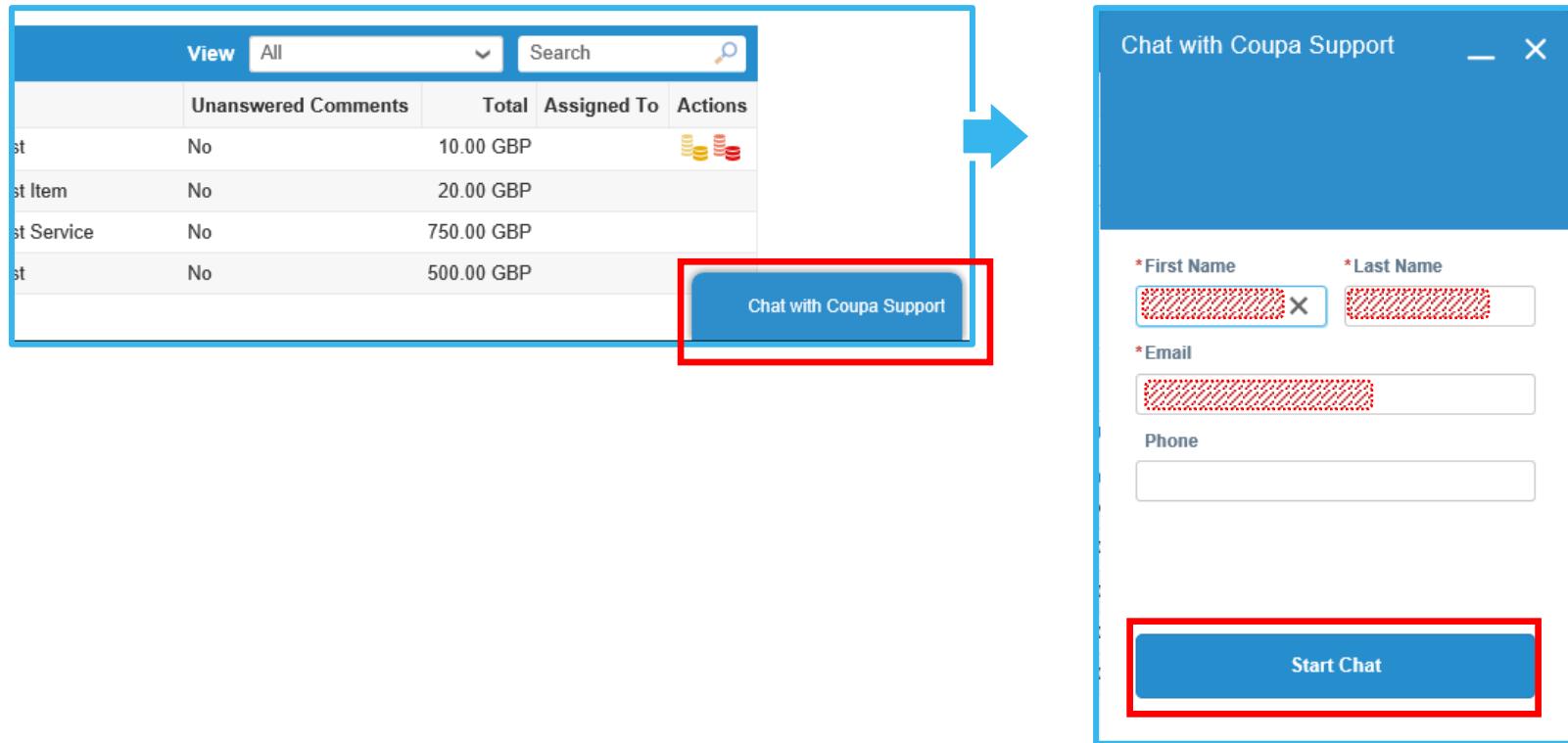
「Yes/No」 will be displayed for 「Paid」 column.

Helpdesk

- Coupa Chat Support
- Service Now

Helpdesk

If you encounter any problem you may contact us, or can also request assistance directly to the Coupa Support team through the chat function



The image shows a screenshot of the Coupa software interface. On the left, there is a table with columns: Unanswered Comments, Total, Assigned To, and Actions. The table contains four rows with values: No, 10.00 GBP, and three small icons in the Actions column. Below the table is a blue button labeled "Chat with Coupa Support". A red box highlights this button. A blue arrow points from this button to a separate window on the right. The right window is titled "Chat with Coupa Support". It contains fields for First Name, Last Name, Email, and Phone, each with a red hatched placeholder. At the bottom is a blue button labeled "Start Chat", which is also highlighted with a red box.

Service Now

We are currently building a support system through Service Now platform to assist you further...

Menu

Thank you!

MOVE THE WORLD FORWARD

MITSUBISHI
HEAVY
INDUSTRIES
GROUP