

Coupa Supplier Portal (CSP) Quick Reference Invoicing Guide



This Quick Reference Guide (QRG) will outline;

- 1. How to **Get started** with the Coupa Supplier Portal (CSP)
- 2. View **Orders**
- 3. Create **Invoices**
- 4. Additional **Information & FAQs**

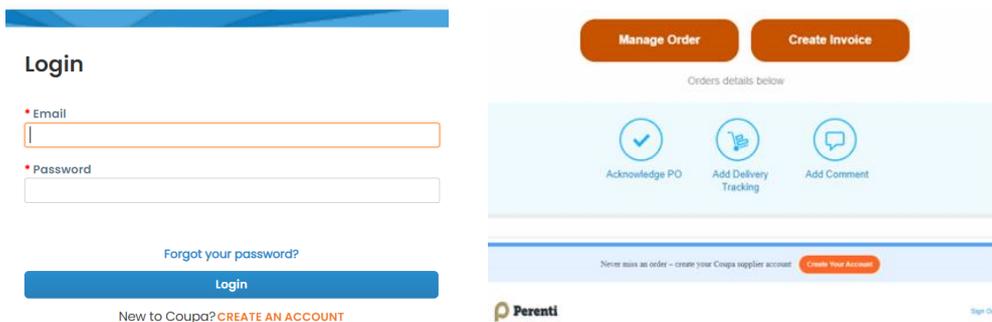
1. Get Started - Log in to Coupa.

- 1. An invite will be emailed from Perenti to invite you to register to the Coupa Supplier Portal (CSP), if not received, please email helpdesk.coupa@perentigroup.com
- 2. Once received, click either **Join Coupa Supplier Portal** button to register or *Forward Invitation* to another user within your company to get set up.



- 3. If you have already set up your CSP account and are a customer of Perenti, log in via <https://supplier.coupa.com> and enter your Coupa registered email and password.

Alternatively, you can request to connect to CSP by selecting **Create Your Account** from the PO (Purchase Order) email after selecting **Manage Order** or **Create Invoice**.



- 4. Getting Help – Once you have successfully logged in, you can Take a Tour which is an online demonstration on how to use the Coupa Supplier Portal (CSP). <https://supplier.coupa.com/help/>

2. View Orders



The Orders menu allows you to:

- View Purchase Orders (PO) that have been issued and approved by Perenti
- Create an invoice against a Purchase Order
- View **Order lines** which allow you to create a custom view and report on all lines on the purchase order (for example: view invoiced lines, PO need by date, receipted lines etc)

Viewing Purchase Order details:

- Select **PO Number** to view the Purchase Order details.
- You can add **Comments**, which will be visible to you and Perenti.
- **Acknowledge PO**. This lets Perenti know you have viewed and acknowledged the PO.

3. Create invoices

There are three options to create or 'flip' a Purchase Order into an invoice:

Via Coupa Supplier Portal (CSP)

1. Under actions in the PO menu **Click on Create Invoice** (gold coin icon)
2. **Click on the PO number link** to open the PO and then **click on the create invoice button**.
3. Via the **Invoices** menu and **Create Invoice from PO** button



Via SAN (Supplier Actionable Notification) PO Email

4. Submit your invoice direct from the **PO email** on receipt of the purchase order in your inbox.

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Note: All fields with an * are mandatory and required to submit your invoice to Perenti.

1. Enter your * **Tax Invoice No.** and * **Invoice Date** (ensure the invoice date entered in Coupa matches your Official Tax Invoice as payment is calculated on your date and payment term).
2. Attach a copy of your * **Official Tax Invoice Attachment** (i.e., a copy of the invoice generated from your billing system (NB: only attach JPG, PNG, TIFF, PDF or GIF files)
3. Ensure all information is selected in the * **From** fields (Supplier, Invoice-From Address, Remit-To Address and Ship-From Address)

The screenshot displays the 'Lines' section of the Coupa Supplier Portal. At the top, there are fields for 'Qty' (8.0000) and 'Price' (100.00), both marked with a red circle '4'. The 'Description' field contains 'RENOCLEAN ECOSOLVE DEGREASER - FUCHS - 20L'. To the right, a total of '800.00' is shown with a red 'x' icon, marked with a red circle '5'. Below the main line item, there are fields for 'PO Line' (APL-10528390-1), 'Service/Time Sheet Line' (None), 'Contract' (dropdown), and 'Period' (2 Periods). A 'Supplier part number' field contains '3919020'. At the bottom left, there are buttons for '+ Add Line' (marked with a red circle '6') and '+ Pick lines from Contract'. On the right, the 'Total Taxes' section shows 'Lines Net Total' as 800.00, 'GST/Tax' as 80.00 (marked with a red circle '7'), and a 'Total' of 880.00. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate' (marked with a red circle '8'), and 'Submit' (marked with a red circle '9').

Note: All lines from the PO will appear in your invoice entry and can be updated as required if the field is not greyed.

4. If required, update the **Qty** or **Price** to match your invoice, noting that if Qty is greater than the issued Purchase Order, please refer to the contact details listed on your purchase order as an order revision may be required prior to your tax invoice being submitted.
5. **Delete** any lines which should not be included in the invoice entry by selecting the red .
6. **Add Line** (i.e., freight charge applicable to order and not listed on PO)
7. Select the appropriate **GST/Tax Rate** from the dropdown list. Use either **AU (T) GST** or **AU (F) GST Free**, other tax codes are for internal use by Perenti.
8. Select **Calculate**, ensuring the totals match your billing system invoice.

9. Select **Submit** to send invoice to Perenti Group of Companies for payment.

4. Additional Information and FAQs

Coupa Supplier Portal login URL <https://supplier.coupahost.com>

If you require further information on the Coupa Supplier Portal, please access the links below.

https://success.coupa.com/Suppliers/For_Suppliers

https://compass.coupa.com/Import/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_Admin_and_User_Guide.pdf

or

If you have any questions or require any assistance, please contact Perenti helpdesk.coupa@perentigroup.com

----- Frequently Asked Questions -----

1. Coupa Supplier Portal (CSP) Account
2. Purchase Orders
3. Invoicing
4. Payments

Coupa Supplier Portal (CSP) Accounts

Q. Signing up to the Coupa Supplier Portal (CSP), how much does it cost to join?

Coupa is free, there is no cost to the supplier to sign up and use the CSP. Coupa nor Perenti charge suppliers to join. *Any additional services offered by Coupa are optional should you wish to accept and may involve annual costs.*

Q. Where do I register?

You need an invitation to join the Coupa Supplier Portal (CSP) and to ensure you are connected to Perenti as a customer in the CSP. If you have not already received one, ask the purchasing team (refer to details as listed on your PO) to arrange to email you a Coupa invitation.

Q. Where do I sign in?

You can sign into your CSP account at <https://supplier.coupahost.com>

Q. How do I add an employee from my Business?

Invite your colleagues to use the portal via Setup (Admin > Users > Invite User)
The CSP Administrator (Admin) can then assign permissions to the user requiring access.

Additional information on managing users can be found via the below link:
<https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/users/manage-users>

Q. Where's the tab for Perenti?

Once you are signed into the CSP, if you do not have Perenti listed as a customer in your Coupa account, it is probably because you registered for CSP using a different email address than Perenti used for the invite. Please contact Perenti and ask us to send another invite using the address you registered with.

Q. How do I see Perenti's purchase orders?

Purchase Orders are emailed to your nominated PO address. You will not be able to see purchase orders in the CSP if your access has not been enabled for you as a user to your account. Contact the purchasing team (refer to details as listed on your PO) to arrange to email you a Coupa invitation.

Q. How do I manage email notifications from the CSP?

To view details of your notifications and to manage them (turn them on or off), click on the **Notifications** link to select your user preference either online, email or SMS

Purchase Orders

Q. How do I create an invoice that is not backed by a purchase order?

All invoices issued must be backed with a purchase order unless agreed with Perenti. Please contact the Perenti employee who requested the goods or services and have them issue you a copy of the Coupa Purchase Order. It is important that you ensure the business provides a purchase order to you prior to commencing work, and you quote this PO number on your invoices submitted.

Q. What is the purpose of PO acknowledgment by the supplier?

The Acknowledge PO button lets Perenti users know that you have received and viewed the PO. You are strongly encouraged to use this feature.

Q: What are comments used for?

Adding a comment allows you to communicate directly to Perenti using the PO. Comments are also available in the invoices.

Invoicing

Q. How do I create an invoice?

Go to your Orders tab and choose the Purchase Orders (PO) you would like to invoice, and then click on the yellow stack of coins  to create an invoice.

Click the  Action to Invoice from a Purchase Order

Q. What options are available for me to submit an invoice?

There are three (3) options to submit invoices to Perenti:

1. Sign in to the **Coupa Supplier Portal**, where you can flip a PO to create an invoice.
2. Via the **interactive PO email** sent to your nominated email address, SAN method.
3. **cXML**, where you can automate the process of sending an invoice file using Coupa's standard cXML format.

Q. How do I create an invoice if I have not received a Perenti purchase order?

Please contact the Perenti employee who requested the goods or services and have them issue you a copy of the Coupa purchase order.

Q. Does my invoice need to reference the Perenti PO number?

Yes. All invoices to Perenti must reference the Purchase Order issued to you by Perenti prior to supplying products or services.

Q. Do I need to submit my own invoice copy?

Yes, use the Official Tax Invoice attachment field to attach your invoice copy when creating the invoice.

Q. Does the Coupa invoice date need to be the same as my company system generated invoice?

Yes, ensure that the invoice details entered in Coupa exactly match the invoice generated from your own billing system. Invoice date must accurately match your invoice date as payment is calculated from the Coupa invoice entry.

Q. How do I know if an invoice has been submitted to Perenti?

Click into the Invoices tab to see a searchable list of your submitted invoices.

Q. What do I do if an invoice is disputed by Perenti?

Find the invoice in your invoices tab and use the available action icon to resolve the dispute.

Q. What do the Coupa Invoices status mean?

Invoicing statuses:

- **Approved** (approved for payment by Perenti)
- **Draft** (the invoice has been created, yet not submitted and can be edited (✎))
- **Pending Approval** (awaiting approval for payment by Perenti)
- **Processing** (invoice submitted and received by Perenti)
- **Disputed** (invoice has been disputed by Perenti and awaiting resolution by supplier)
- **Voided** (invoice not valid, status of invoice once resolution of a disputed invoice)

Q. Why can't I edit/void/delete an invoice?

You can delete any draft invoice you create. Once an invoice has been submitted, it cannot be changed in any way. Ask Perenti to reject / dispute the existing invoice. You can then create a new one or amend the invoice to fix any errors.

Q. How do I credit or cancel an invoice that has already been billed.

If you need to send a credit note that relates to a Purchase order, please email the credit note to the accounts team listed on the Purchase Order under payment queries section.

Q. What does the "Export to" button do?

This button allows you to export the data displayed in a view to an Excel document.

Payments

Q. If I use the Coupa Supplier Portal (CSP), who pays me?

Perenti is responsible for paying you directly. Coupa does not pay suppliers on behalf of buyers.

Q. Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is in Perenti's queue, and you will be paid based on the payment terms you have with Perenti.

Q. Can I view payment details of my invoices in Coupa (CSP)?

Yes, payment information can be viewed against the approved invoice and by selecting the payment information view under the invoices section in the CSP.

Q. What if I have an invoice that has not been paid?

For questions regarding payment information, contact the Perenti Business Group contact listed on the Purchase Order under payment queries section.

Q. How do I update my banking information for direct deposits?

Your banking information is stored in Perenti's ERP system and not stored in Coupa. If your bank account details need to be updated, you will be required to submit the new details on a Company letterhead. Email this information request to the Perenti contact listed on your purchase orders.