



Aon Supplier Enablement

Coupa Supplier Training Materials

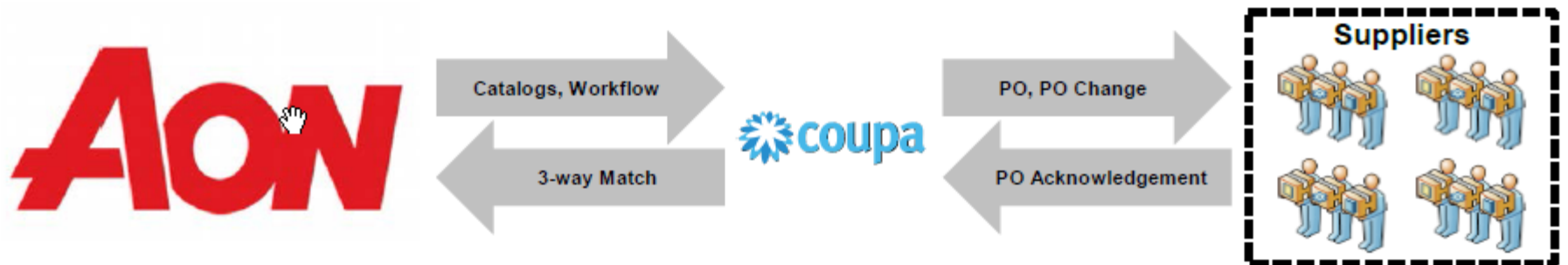
May, 2020

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Overview

- Coupa is an online P2P platform, which aim is to connect buyers with suppliers in order to improve communication and cash flow.
- It is used by Aon to purchase goods and services, create and send purchase orders and to receive invoices from suppliers.
- The Coupa Supplier Portal is a tool designed for suppliers in order to enable control over incoming purchase orders, facilitate invoicing and to guarantee visibility into invoices status.
- The Coupa Supplier Portal is free of charge, there are no additional costs for suppliers.



Additional Resources

Important sites and contacts:

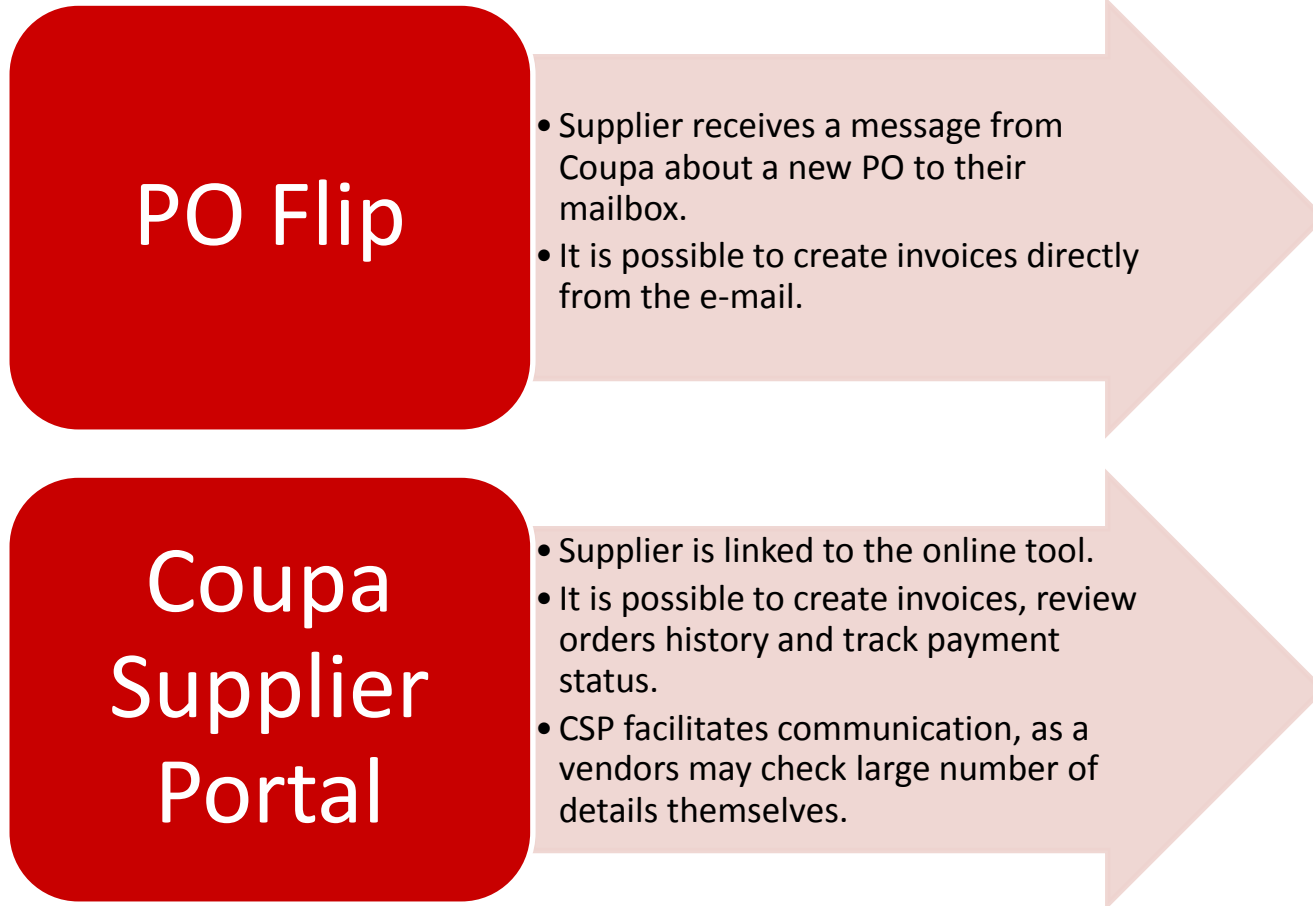
- General Information: www.aon.com > About Aon > Supplier Information

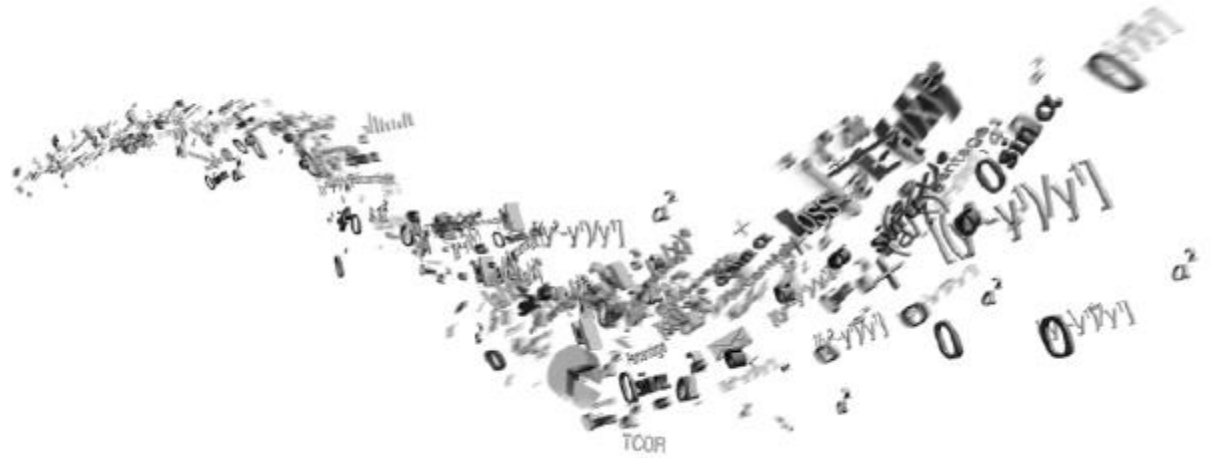
For any issues and questions regarding Coupa Supplier Portal and invoices and payments: Global Spend Management Helpdesk gsmhelpdesk@eon.com

- Coupa resources for suppliers: <https://success.coupa.com/Suppliers>

Invoicing Options

- Vendors have to options to integrate with Coupa electronically and submit their invoices.





PO Flip

PO Flip

- Using this option, you will receive a Purchase Order to the indicated e-mail address.
- In the message there are buttons which allow you to take an action.
- It is not possible to create a credit note using PO flip.

Aon <do_not_reply@aon-test2.coupahost.com>
to me ▾

AON Henderson Risk Management Limited Purchase Order #GB0091000187426

Powered by  Coupa

Create Invoice	Acknowledge PO	Add Shipment Tracking	Add Comment
--------------------------------	--------------------------------	---------------------------------------	-----------------------------



Henderson Risk Management Limited PURCHASE ORDER

PO NUMBER
GB0091000187426

DATE
05/07/20

PAYMENT TERMS
30D

SHIPPING TERMS
Best Way

CURRENCY
GBP

CONTRACT

CONTACT

(UK) LIMITED

11374 Upgrade street
11374 Upgrade street2
San Mateo, CA 11111
Attn: Supplier Supplier
[@gmail.com](mailto:)

- **“Create Invoice”** – allows to create an invoice directly from this message.
- **“Acknowledge PO”** – allows to inform the requester that the supplier received the purchase order – recommended.
- **“Add Shipment Tracking”** – allows to add the shipment tracking details. This tracking details are also visible to the customer user in PO – optional.
- **“Add Comment”** – allows to add some information for the requester.



Add Shipment Tracking

Create Shipment Tracker ✕

Enter tracking number for entire PO. To ship PO partially, create ASN.

* Tracking Number

* Carrier

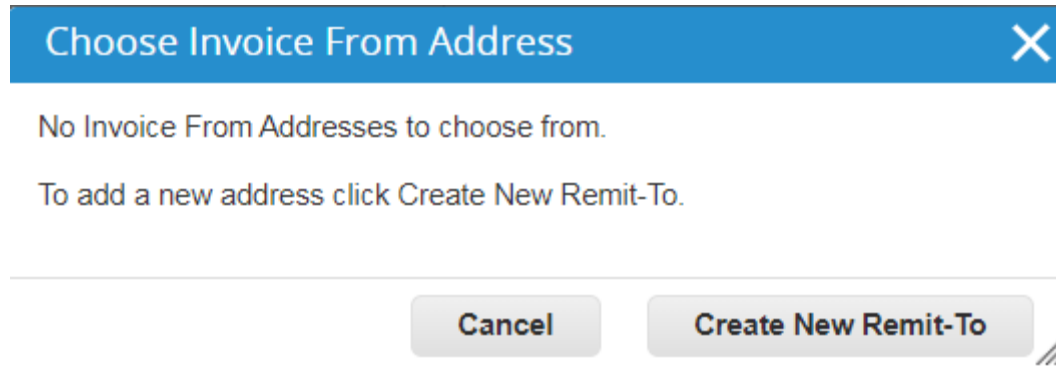
Note

- Fedex
- USPS
- UPS
- DHL
- OnTrac
- Asendia
- Apc

- Fill in **Tracking Number**, select the **Carrier** and add an information for your customer in the **Note** field, if applicable. Then click **Save**.

PO Flip

- When attempting to create an invoice for the first time, you will be requested to create the new remit-to.



PO Flip

Enter a new address ✕

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

Company Information

Supplier (UK) LIMITED

* Country

* Type of Company

Board of Directors

Address

Remit To Name

* Line 1

Line 2

* City

State

* Postal Code

Preferred Language

Tax Registration

Tax Country

* VAT ID

- Fill the **red asterisk** fields (e.g. Type of Company, Address, VAT ID).
- The address which is being created will be by default used as Remit-to and Ship From address.

Use this address for Remit To i

Use this for Ship-From address

Untick box if your Remit-To Address is different to your legal entity's address, or if you have more than one Remit-To location.

PO Flip

Banking Information

NOTE: Banking information is required for compliant invoicing when indicated (with a *). Otherwise, banking info here is not required and will remain private

Bank Name:

Beneficiary Name:

Bank Account Number:

Transit Code Type:

Transit Code:

IBAN:

SWIFT Code:

Cancel

Create and Use

Our compliant invoicing Terms of Use have been revised.
Please confirm that you have read and agree to the current [Terms of Use](#).
If you do not agree, you will not be able to send invoices to Coupa compliant customers.

I Accept

- Once all obligatory fields are updated, click on “**Create and Use**”.
- Then you will be asked to accept “**Terms of Use**”.

PO Flip – create an invoice

- After clicking a “**Create Invoice**” button, you are automatically transferred to Create Invoice view in Coupa.
- Scan of the original invoice in PDF must be attached in the “Image Scan” section (except US, Canada, UK and the Netherlands). You can add additional files (e.g. an excel file) in the “**Attachments**” field.

Create Invoice Create

General Info From

* Invoice #

* Invoice Date

Payment Term 30D

Date of Supply

* Currency

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

Attachments | |

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

* Supplier

* Supplier VAT ID

* Invoice From Address

test1uk
city1uk
88888
United Kingdom
LTD.

* Remit-To Address

test1uk
city1uk
88888
United Kingdom

* Ship From Address

test1uk
city1uk
88888
United Kingdom

To

Customer Aon



* Bill To Address Henderson Risk Management Limited
178735 Upgrade street
178735 Upgrade street2
San Mateo, CA 11111
United States

* Buyer VAT ID

- **Remit-To Address** and **Ship From Address** have to be chosen by a supplier.
- When creating an invoice for the first time, the system will ask you to create a Remit-To address.
- If you have only one Remit-To, it will be set as a default.

PO flip– create invoice

☰ Lines Line Level Taxation



Type	Description	Price	
	<input type="text" value="testuk1"/>	<input type="text" value="100.00"/>	100.00 

PO Line: GB0091000187426-1 Contract:
Supplier Part Number: Service Expiration Date: None


Billing Notes:

Billing: Not Required-Use Accounting Treatment-24410:Keith Buckle (HRM)-Equipment Purchases-Expensed-OFFICE_EQUIPMENT_SUPPLIES

☰ Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	<input type="text" value="testuk2"/>	<input type="text" value="10"/>	Each <input type="button" value="v"/>	<input type="text" value="10.00"/>	100.00 

PO Line: GB0041000187427-1 Contract:
Supplier Part Number: Service Expiration Date: None

- Every PO line stands for different product ordered.
- To invoice a PO partially:
 - Change quantity (for a quantity based PO) or price (for a service based PO).
 - Delete chosen line. 

PO flip– create invoice

☰ Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	testuk2	10	Each	10.00	100.00

PO Line	Contract	Supplier Part Number	Service Expiration Date
GB0041000187427-1			None

Billing Notes

Billing

Not Required-Use Accounting Treatment-103004:103004 Townsend Group Europe GB004-Equipment Purchases-Expensed-OFFICE_EQUIPMENT_SUPPLIES

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
			<input type="text"/>

- GB: GBR_EXEMPT - 0.0%
- GB: GBR_OUT_OF_SCOPE - 0.0%
- GB: GBR_VAT_MIXED_RATE - 4.0%
- GB: GBR_VAT_MIXED_RATE_4 (RC) - 0.0%
- GB: GBR_VAT_REDUCED_RATE - 5.0%
- GB: GBR_VAT_REDUCED_RATE_5 (RC) - 0.0%
- GB: GBR_VAT_STANDARD_RATE - 20.0%
- GB: GBR_VAT_STANDARD_RATE_20 (RC) - 0.0%
- GB: GBR_VAT_ZERO_RATE - 0.0%

- For taxation you can:
 - Select “**Line Level Taxation**” to choose different tax rate for each line. For some countries line level taxation is required and in such a case, a vendor does not see a general tax field.

PO flip– create invoice

Totals & Taxes

Lines Net Total	100.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	100.00
Total	100.00

- For taxation you can:
 - Enter a general tax in **“Tax”** at the bottom of the page – it will be applicable to all the lines.
- For each country there are different rates available. For U.S. the only rate is 0% and then a vendor has to enter the tax rate himself.
- For suppliers from certain regions a word **“Tax Description”** is substituted with **“VAT Rate”**.

Remember to always click “Calculate” after changing any value on an invoice.

You can delete this invoice, save it as draft or submit it to your client.

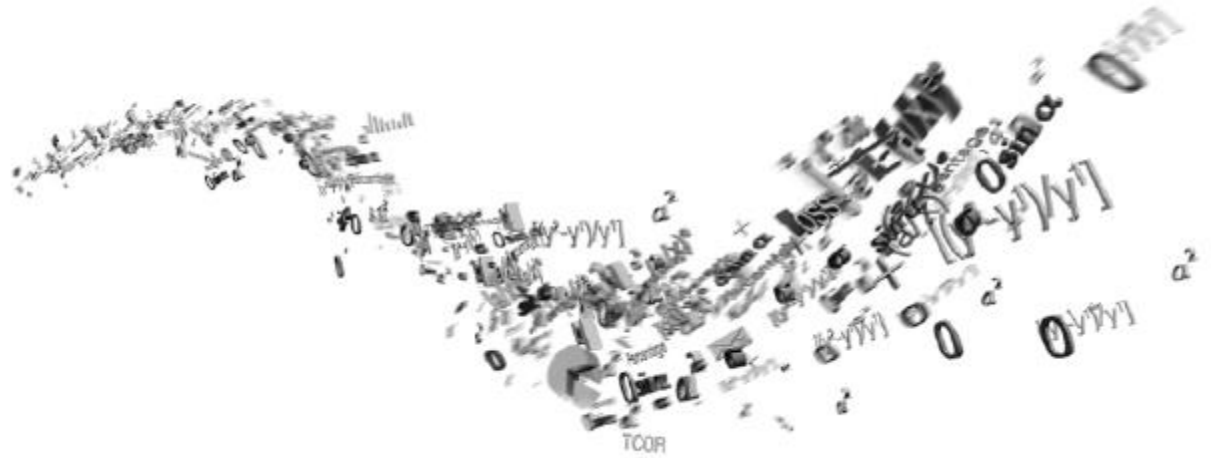
PO flip– create invoice

- The following pop up window will appear after you submit an invoice. Please disregard this message, if you are invoicing Aon from the location different than US, Canada, UK or the Netherlands.

Are You Ready to Send? ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

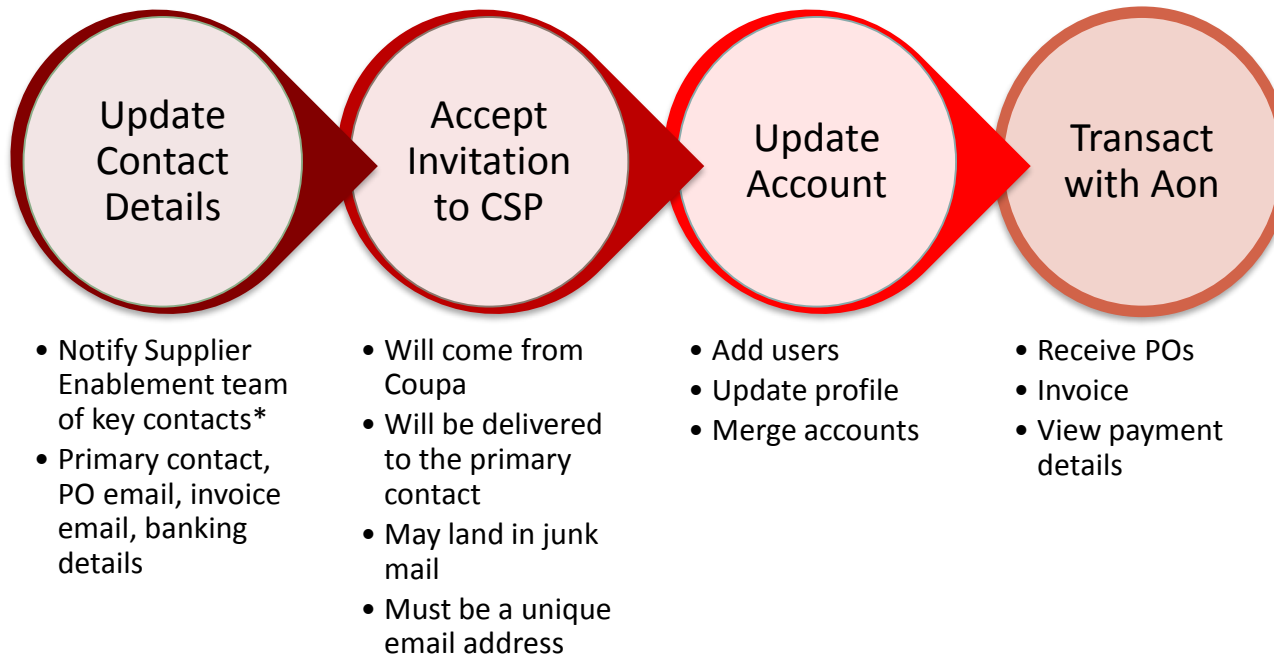
[Continue Editing](#) [Send Invoice](#)



How to connect to CSP?


How to get connected to CSP?

- Each of the below steps must happen before a supplier can properly interact with Aon:



Profile update


- Information included in your profile is visible on the main page when you log in to CSP.







 **coupa** supplier portal SUPPLIER ▾ | NOTIFICATIONS **21** | HELP ▾

Home **Profile** Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Your Public Profile Your Customer Profiles

SUPL-000012005-PL Contact Information



- Website 
- Industry 
- About 
- Established 
- Top Commodities 
- Currencies 

Address 105193 Upgrade street
San Mateo
11111
United States

Primary Contact Supplier Supplier
aonsupplier9@gmail.com

Work Phone

Mobile Phone

Fax Number

Description

[Edit Profile](#)

Profile update

- Choosing “**Edit Profile**” you can update general information about your company.
- Here you can choose, if you update your **public profile** or one visible for a **specific customer**.


The screenshot shows a web application interface for profile management. At the top is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below this is a sub-menu with 'Your Public Profile' and 'Your Customer Profiles', both highlighted with a red box. The main content area is divided into two sections. The left section, titled 'SUPL-000012005-PL', contains a globe icon and a list of profile attributes: Website (globe icon), Industry (wrench icon), About (house icon), Established (calendar icon), Top Commodities (shopping cart icon), and Currencies (dollar sign icon). The right section, titled 'Contact Information', lists: Address (105193 Upgrade street, San Mateo, 11111, United States), Primary Contact (Supplier Supplier), Work Phone, Mobile Phone, and Fax Number. At the bottom right, there is a blue 'Edit Profile' button highlighted with a red box. Below the main content area is a 'Description' section.


Profile update

- Obligatory fields are marked with a red asterisk (Name, Primary Contact).
- Address and contact information can be updated directly via CSP. Only bank details cannot be changed this way.

General Information

*** Name**

Logo 

Profile Background 

Industry


Year Established


Short Description


Full Description

Registered Users aonsupplier9@gmail.com

Web Site

LinkedIn Profile 

Facebook Profile 

Twitter Profile 

Address

Address Line 1

Address Line 2

City

State

Postal Code

Country

Primary Contact

*** First Name**

*** Last Name**

*** Email**

Work Phone

Mobile Phone

Fax Number

PO Delivery Email

Receive & view orders

- Click “**Orders**” in the menu bar, so that you can review Purchase Orders you received.
- You can select customers for reviewing orders.
- If you would like to configure the PO delivery, please contact gsmhelpdesk@aon.com


The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'SUPPLIER NAME' with a dropdown arrow, 'NOTIFICATIONS' with a red circle containing the number '4', and 'HELP' with a dropdown arrow are on the right. Below this is a blue navigation bar with the following items: 'Home', 'Profile', 'Orders' (highlighted with a red circle), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Admin'. Underneath the navigation bar, there are two sub-items: 'Orders' and 'Order Lines'. To the right of the navigation bar, there is a 'Select Customer' dropdown menu with 'Aon' selected, and a 'Configure PO Delivery' button.

Purchase Orders

Instructions From Customer

Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
GB0081000187428	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP		

Receive & view orders




- Select a relative PO by clicking on its number in “**PO Number**” column.
- Use the search menu to find the PO.

Purchase Orders

Instructions From Customer

Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
GB0081000187428	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP		 
GB0041000187427	05/07/20	Issued	None	10 Each of testuk2	No	100.00 GBP		 
GB0091000187426	05/07/20	Issued	None	testuk1	No	100.00 GBP		 

Receive & view orders

Purchase Order #GB0041000187427

Status Issued - Sent via Email

Order Date 05/07/20

Revision Date 05/07/20

Requester Kinga Laburda

Email

Payment Term 30D

Attachments None

Acknowledged

Assigned to

Shipping

Ship-To Address 1205 Upgrade street
San Mateo, CA 11111
United States
Location Code: 3010
Attn:

Terms Best Way

Shipment Tracking

+ Add

No shipment tracking.

Lines

Advanced <input type="text" value="Search"/> Sort by <input type="text" value="Line Number: 0 → 9"/>							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		testuk2	10	Each	10.00	100.00	0.00
Part Number	Manufacturer Name	Manufacturer Part Number	Service Expiration Date				
None	None	None	None				

- You can check PO details and shipping address.
- Click the “**Acknowledged**” checkbox to notify customer that you have received the PO.
- The “**Invoiced**” section tells you, if some part of the PO has already been invoiced or not (in case of multiple invoices).
- Click on “**Advanced**” button to filter order lines.
- By using “**Sort by**” you can adjust the lines view by sorting them.

Receive & view orders

Total **100.00** GBP

Create Invoice Save Print View

Comments ▼

Enter Comment

Add Comment

You can also:

- Print the PO (“**Print View**”)
- Create invoice directly from this page
- Add a comment for a requestor

Receive & view orders – create invoice

- To create invoice, click a **gold coin** icon in the column on the right OR the “**Create Invoice**” button when viewing PO details.
- “**Create Invoice**” form will appear and the system will ask to choose a **Remit-to address**. When attempting to create an invoice for the first time, you will be requested to navigate to “**Legal Entity Setup**” to set up a Remit-to address.

Purchase Orders

Instructions From Customer

Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.


Click the  Action to Invoice from a Purchase Order

							View	All	Search	
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions		
GB0081000187428	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP				

Choose Invoicing Details

* Legal Entity

Select

 Add New

* Remit-To

Select

* Ship From Address

Select

Receive & view orders – create invoice

Choose Invoicing Details ✕

*** Legal Entity** + Add New

Invoice From addressuk1
cityuk1
87654
United Kingdom
United Kingdom (GB123456789)

*** Remit-To** + Add New

*** Ship From Address** + Add New

If there is only one Remit-to address, the system sets it as a default one and will not ask you for it every time.

Create invoice

- After clicking a “**Create Invoice**” button, you are automatically transferred to Create Invoice view in Coupa.
- Scan of the original invoice in PDF must be attached in the “Image Scan” section (except US, Canada, UK and the Netherlands). You can add additional files (e.g. an excel file) in the “**Attachments**” field.

Create Invoice Create

General Info From

* Invoice #

* Invoice Date

Payment Term 30D

Date of Supply

* Currency

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

Attachments | |

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

* Supplier

* Supplier VAT ID

* Invoice From Address

test1uk
city1uk
88888
United Kingdom
LTD.

* Remit-To Address

test1uk
city1uk
88888
United Kingdom

* Ship From Address

test1uk
city1uk
88888
United Kingdom

To

Customer Aon

* Bill To Address Henderson Risk Management Limited
178735 Upgrade street
178735 Upgrade street2
San Mateo, CA 11111
United States



* Buyer VAT ID

- **Remit-To Address** and **Ship From Address** have to be chosen by a supplier.
- When creating an invoice for the first time, the system will ask you to create a Remit-To address.
- If you have only one Remit-To, it will be set as a default.

Create invoice

Lines

Line Level Taxation

Type	Description	Price	
	<input type="text" value="testuk1"/>	<input type="text" value="100.00"/>	100.00 



PO Line	Contract	Supplier Part Number	Service Expiration Date
GB0091000187426-1	<input type="text" value="v"/>	<input type="text"/>	None

Billing Notes


Billing
Not Required-Use Accounting Treatment-24410:Keith Buckle (HRM)-Equipment Purchases-Expensed-OFFICE_EQUIPMENT_SUPPLIES

Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	<input type="text" value="testuk2"/>	<input type="text" value="10"/>	Each <input type="text" value="v"/>	<input type="text" value="10.00"/>	100.00 

PO Line	Contract	Supplier Part Number	Service Expiration Date
GB0041000187427-1	<input type="text" value="v"/>	<input type="text"/>	None

- Every PO line stands for different product ordered.
- To invoice a PO partially:
 - Change quantity (for a quantity based PO) or price (for a service based PO).
 - Delete chosen line. 

Create invoice

Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	testuk2	10	Each	10.00	100.00

PO Line	Contract	Supplier Part Number	Service Expiration Date
GB0041000187427-1			None

Billing Notes

Billing

Not Required-Use Accounting Treatment-103004:103004 Townsend Group Europe GB004-Equipment Purchases-Expensed-OFFICE_EQUIPMENT_SUPPLIES

Taxes


Tax Description	Tax Rate	Tax Amount	Tax Reference
	GB: GBR_EXEMPT - 0.0%		<input type="text"/>
	GB: GBR_OUT_OF_SCOPE - 0.0%		
	GB: GBR_VAT_MIXED_RATE - 4.0%		
	GB: GBR_VAT_MIXED_RATE_4 (RC) - 0.0%		
	GB: GBR_VAT_REDUCED_RATE - 5.0%		
	GB: GBR_VAT_REDUCED_RATE_5 (RC) - 0.0%		
	GB: GBR_VAT_STANDARD_RATE - 20.0%		
	GB: GBR_VAT_STANDARD_RATE_20 (RC) - 0.0%		
	GB: GBR_VAT_ZERO_RATE - 0.0%		

- For taxation you can:
 - Select “**Line Level Taxation**” to choose different tax rate for each line. For some countries line level taxation is required and in such a case, a vendor does not see a general tax field.

Create invoice

Totals & Taxes

Lines Net Total	100.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	100.00
Total	100.00



- For taxation you can:
 - Enter a general Tax in “Tax” at the bottom of the page – it will be applicable to all the lines.
- For each country there are different rates available. For U.S. the only rate is 0% and then a vendor has to enter the tax rate himself.
- For suppliers from certain regions a word “Tax Description” is substituted with “VAT Rate”.

Remember to always click “Calculate” after changing any value on an invoice.

You can delete this invoice, save it as draft or submit it to your client.

Create invoice

- The following pop up window will appear after you submit an invoice. Please disregard this message, if you are invoicing Aon from the location different than US, Canada, UK or the Netherlands.

Are You Ready to Send? ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

[Continue Editing](#) [Send Invoice](#)

- The newly created invoice will be visible in the Invoices tab.

Invoices

SUPL- [redacted] -GB invoice #test1uk is processing ✕

Create Invoices i

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

View All 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
test1uk	05/07/20	Processing	GB0091000187426	105.00 GBP	No	

Create credit note


- To create the credit note, click a red coin icon in the column on the right.
- **“Create Credit Note”** form will appear and the system will ask to choose a Remit-to address (see: **Legal Entity Setup**), similarly to **“Create Invoice”**.

Purchase Orders

Instructions From Customer

Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.

Click the  Action to Invoice from a Purchase Order

							View	All	Search	
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions		
GB0081000187428	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP		  		
GB0041000187427	05/07/20	Issued	None	10 Each of testuk2	No	100.00 GBP		  		
GB0091000187426	05/07/20	Issued	None	testuk1	No	100.00 GBP		  		

Create credit note

- All fields marked with a **red asterisk** have to be filled. The form looks similar to the one for creating an invoice.

Create Credit Note Create

General Info From

* Credit Note #

* Credit Note Date

Payment Term 30D

Original Date of Supply

* Currency

Delivery Number

Status Draft

* Original Invoice #

* Original Invoice Date

Image Scan No file chosen

Supplier Note

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

Cash Accounting Scheme

* Credit Reason

Early Payment Provisions

Margin Scheme

* Supplier SUPL-000048686-GB

* Supplier VAT ID

* Invoice From Address

* Remit-To Address

* Ship From Address

Enter a number and date of the original invoice.

Create credit note

Lines

Adjustment Type

Type	Description	Qty	UOM	Price	
	<input type="text" value="testuk2"/>	<input type="text" value="-10.0"/>	<input type="text" value="Each"/>	<input type="text" value="10.00"/>	100.00

PO Line Contract Supplier Part Number Service Expiration Date

Lines

Adjustment Type

Type	Description	Qty	UOM	Price	
	<input type="text" value="testuk2"/>	<input type="text" value="10.000"/>	<input type="text" value="Each"/>	<input type="text" value="-10.00"/>	100.00

PO Line Contract Supplier Part Number Service Expiration Date

Totals & Taxes

Lines Net Total	100.00
Lines VAT Totals	0
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Total VAT	0.00
Net Total	100.00
Gross Total	100.00

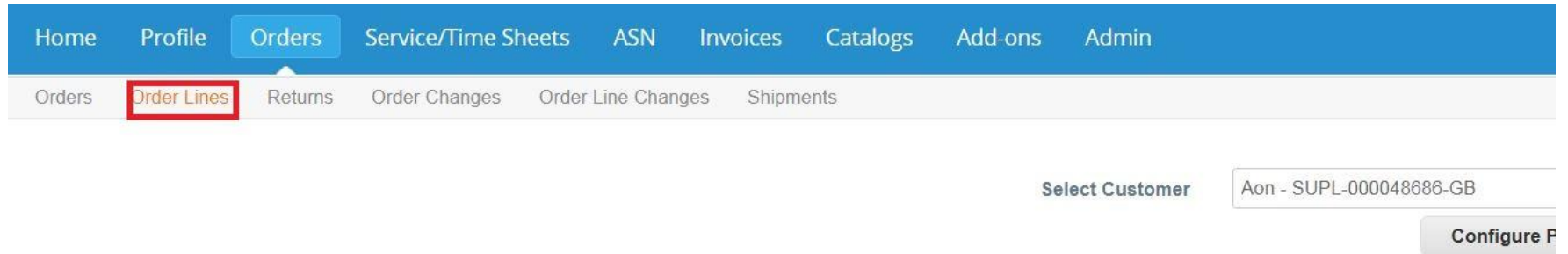
- To enter negative value, add “-” in the “Quantity” field (for a quantity based PO) or “Price” field (for a service based PO).
- It is also possible to modify quantity, value or to delete line, as explained before in “Create Invoice”

Remember to always click “Calculate” after changing any value on an invoice.

You can delete this credit note, save it as draft or submit it to your client.

Receive & view orders – Order Lines

- An “**Order Lines**” tab in the “**Orders**” section allows to you see a list of all lines from the orders received by your company.
- You can review which product categories are purchased and create a report for analysis purposes with “**Export to**” option.



Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders **Order Lines** Returns Order Changes Order Line Changes Shipments

Select Customer Aon - SUPL-000048686-GB **Configure F**

Purchase Order Lines



PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
GB0081000187428	2	Issued	1 Each of testuk4	1	50.00
GB0081000187428	1	Issued	testuk3	None	100.00
GB0041000187427	1	Issued	10 Each of testuk2	10	100.00
GB0091000187426	1	Issued	testuk1	None	100.00

Invoices

- Click “**Invoices**” in the menu bar, in order to review invoices submitted by you.
- You can select customers for reviewing invoices.
- A report can be created by clicking on “**Export to**” button.

The screenshot displays the AON Invoices interface. At the top, a blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a red box), Catalogs, Add-ons, and Admin. Below this, a breadcrumb trail shows 'Invoices' and 'Payment Receipts'. A yellow notification banner states: 'You have 1 customer announcements related to Invoices (Aon) [View All Announcements](#)'. To the right, a 'Select Customer' dropdown menu is open, showing 'Aon - SUPL-000048686-GB' (highlighted with a red box). Below the notification, the heading 'Invoices' is followed by 'Create Invoices' with a help icon. Four buttons are visible: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. At the bottom, a table with columns 'Invoice #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', and 'Actions' is shown. The first row contains: 'test1uk', '05/07/20', 'Disputed', 'GB0091000187426', '105.00 GBP', 'Yes', and a print icon. The 'Export to' button in the table's header is highlighted with a red box.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
test1uk	05/07/20	Disputed	GB0091000187426	105.00 GBP	Yes	

Invoices

- You can select different view (e. g. Payment Information) or create your own view. You can also see the payment status.
- If you want to see invoices with the particular status, you can export the file.

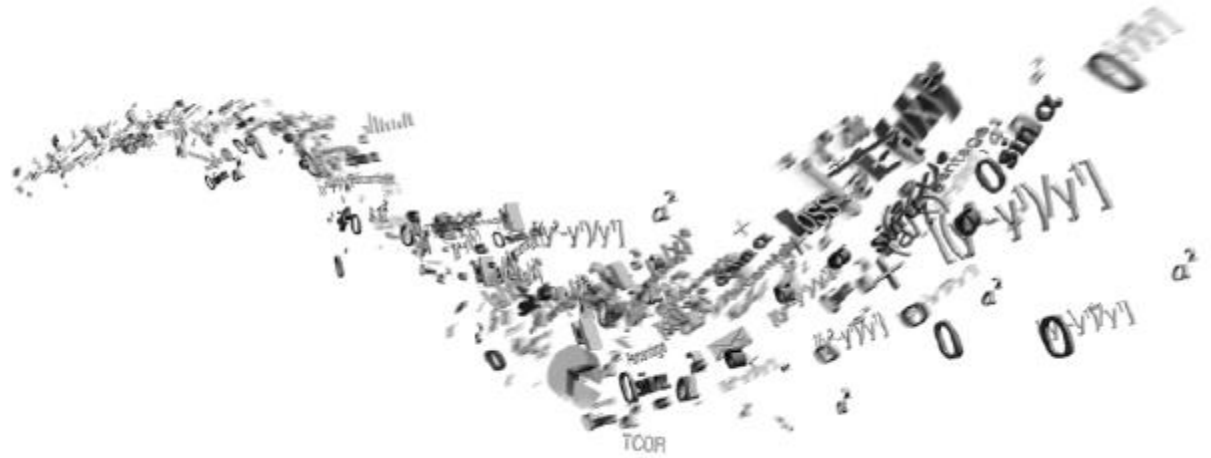
The screenshot displays the Coupa Supplier Portal interface. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Add-ons'. The 'Invoices' menu item is highlighted with a red box. A dropdown menu is open, listing various invoice statuses: All, Abandoned, Approved, Credit Notes, Disputed, Disputes with a supplier response, Disputes without supplier response, Draft, Payment Information, Pending Approval, Processing, Voided, and Create View. The 'View' dropdown is also highlighted with a red box. Below the menu, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', and 'Create Blank Invoice'. A table at the bottom shows invoice details for 'test1uk' with a status of 'Disputed'.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
test1uk	05/07/20	Disputed	GB0091000187426	105.00 GBP	Yes	

Invoices

A supplier can view the following invoice statuses in the CSP:

- **Draft** – Draft invoice that has not yet been submitted.
- **Processing** – Invoice that is between invoice being submitted by the Supplier and the submission being recorded in Aon's instance.
- **Pending Approval** – Invoice undergoing any Aon-internal process to allow final approval. This could be pending receipt or pending approval.
- **Disputed** – Invoice that is currently being disputed by the business or AP.
- **Approved** – Invoice that is approved and ready for payment as per the pay terms or immediately if overdue.
- **Voided** - Invoice voided after being fully approved and processed.
- **Abandoned** - Invoices with no resolution in disputed status can be marked as Abandoned, so that linked POs can be closed once all outstanding actions for the transaction are complete.

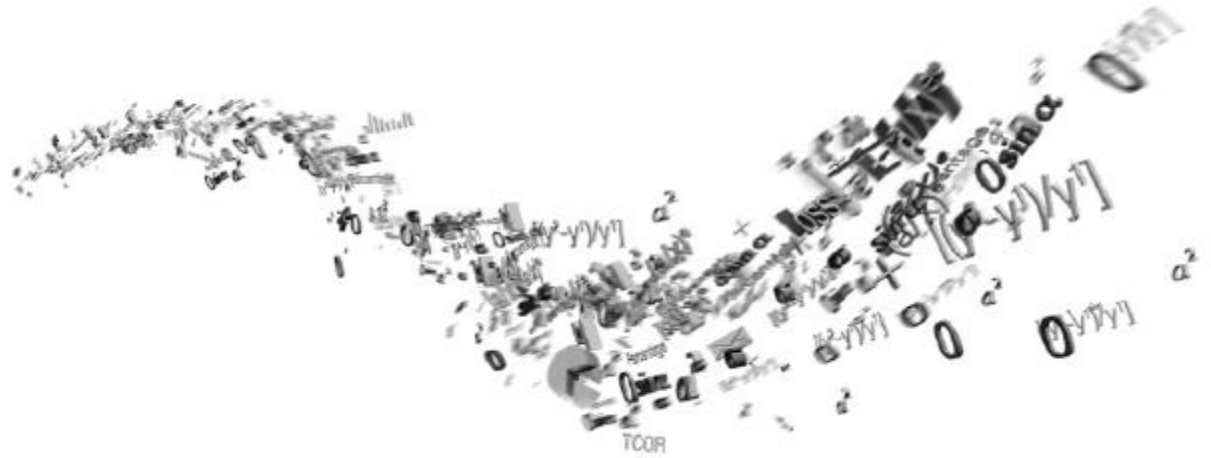


Catalogs

Catalogs

- Click “**Catalogs**” in the menu bar - The catalogs page is where you work with catalogs for your customers such as Aon.
- Within Coupa, a catalog is a collection of items. You can create as many catalog records as you like, but each catalog has to be approved by Aon before it can be included in Coupa search results.

The screenshot shows the Coupa user interface. At the top is a blue navigation bar with the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, **Catalogs** (highlighted with a red box), Add-ons, and Admin. Below the navigation bar, there is a 'Select Customer' dropdown menu currently showing 'Aon - SUPL-000012005-PL' and a 'Configure' button. The main heading is 'Catalogs'. Below the heading is a toolbar with a 'Create' button (highlighted with a red box), an 'Export to' dropdown, a 'View' dropdown set to 'All', an 'Advanced' button, and a search field. Below the toolbar is a table with the following columns: Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. The table currently displays 'No rows.' At the bottom left of the table area, there is a pagination control showing 'Per page 15 | 45 | 90'.



Admin

Admin

- Click “Admin” in the menu bar. In this section you can edit your user information, invite other users to your CSP account, adset up Legal Entity, merge requests, review Remit to etc.

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons **Admin**

Admin Users Invite User

- Users**
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
 - Static Discounting
- SFTP Accounts
- cXML Errors

Users	Permissions	Customer Access
Supplier Supplier [redacted]@gmail.com Edit	ASNs Admin Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets	Aon

Invite User ×

First Name

Last Name

* Email

Permissions i

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

Customers

All

Aon -

Aon -

Aon -

Aon -

Cancel

Send Invitation

- If you want to invite another users, click on **“Invite User”**. Fill in **“E-mail”**, select permissions and customers and then click **“Send Invitation”**.

Admin

- If you want to merge your Aon CSP account with another company CSP account then enter the email address and click **“Request Merge”**.

The screenshot displays the Aon Admin interface. At the top, a blue navigation bar contains the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The 'Admin' menu item is highlighted with a red box. Below the navigation bar, the page title is 'Admin Merge Requests'. On the left side, there is a sidebar menu with the following items: Users, Merge Requests (highlighted with a red box), Legal Entity Setup, Fiscal Representatives, Remit-To, and Terms of Use. The main content area is divided into two sections. The first section is titled 'Initiate Merge Request' and contains a text input field with the email address 'coupa@coupamail.edu' and a blue button labeled 'Request Merge' (highlighted with a red box). The second section is titled 'Open merge requests' and contains the text 'All clear! No open merge requests.'

CSP – how to merge accounts

- The person, you sent a request to will receive an e-mail from Coupa and a notification in the CSP account.
- Information about a new merge request will be visible on the main page in the “Merge Accounts” section and in the “Merge Requests” tab in “Admin”.

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

BUSINESS SERVICE US INC-SHARE is requesting to merge with you

PO BOX 7
PHILADELPHIA, PA 1
United States
us.profile@yahoo.com

Accept Merge

Initiate Merge Request

Request Merge

Open merge requests

05/01/17

BUSINESS SERVICE US INC-SHARE

PO BOX 7
PHILADELPHIA, PA 1
United States

Respond

By clicking on “Respond” on “Accept Merge” button, a further action can be taken.

CSP – how to merge accounts

- The system informs about consequences of accepting a merge requests (who will be the account owner).

Company Account Merge ×

SUPPLIER US of **BUSINESS SERVICE US INC-SHARE** has requested to merge with your Coupa Supplier Portal account.

If you accept this request **the administrator of BUSINESS SERVICE US INC-SHARE will become the account owner** for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account:

- Supplier Canada (ca@aol.com)

Note From Requester: Please accept this merge request.

Provide note for the Requester

I recognize the email address above as a coworker at my company, and I agree to merge

- Tick the check box.
- A request can be either accepted, cancelled or rejected.

CSP – how to merge accounts

- After the merge, any linked customers will be converted to the new account.
- Users from both main and merged account are visible in the “Users” tab in the “Admin” section.
- In the main menu sections, there is a “Select Customer” option. You can choose which company’s profile you want to work on e.g. create an invoice, view orders or change profile.

Admin Users

[Invite User](#)


Users	Permissions	Customer Access
Supplier US inge.us@yahoo.com Edit	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon Aon
Supplier Canada inge.ca@aol.com Edit	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon

Select Customer

CSP – how to merge accounts

- The “**Merge Accounts**” section is also available in the main page when an user logs into the portal.
- The Coupa system automatically suggests a possible merge based on the e-mail domain.

Announcements [View All \(1\)](#)

 **Test CPA.1.089** (Aon)
Test case - CPA.1.089

One-Click Savings [View All](#)

 **Start saving today!**
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

SUPL

105295 Upgrade street

San Mateo 11111

United States

[@gmail.com,](#)
[1@gmail.com](#)

Admin

- To setup a legal entity, click “**Add Legal Entity**” and then follow steps suggested by the system.

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons **Admin**

Admin Legal Entity Setup

Add Legal Entity

Users

Merge Requests

Legal Entity Setup

Fiscal Representatives

Remit-To

Terms of Use

Payment Preferences ▾

Static Discounting

Legal Entity

testuk **Actions**

Invoice From	Remit-To Accounts	Locations	Customers
addressuk1 cityuk1 87654 United Kingdom	Address Remit-To Address addressuk1 cityuk1 87654 United Kingdom Active	1 customer addressuk1 cityuk1 87654 United Kingdom	Aon

Legal Entity Setup

- Enter the legal entity name and choose the country from the drop down list.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.

Legal Entity Setup

- Enter the type of your company. Please note that in some countries this field is not mandatory.

Miscellaneous Information



Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

* Type of Company

Board of Directors

Conducting business in certain countries requires your invoice to contain specific information about your company.

Legal Entity Setup

- Choose customers who should be able to see the legal entity.

Tell your customers about your organization



Which customers do you want to see this?

- All
- Aon - SUPL-000012005-PL
- Aon - SUPL-000042353-DE
- Aon - SUPL-000048686-GB
- Aon - SUPL-000006194-AU

Legal Entity Setup

- Fill in all mandatory fields (marked with red asterisk).

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code *i*

Country

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

Use this address for Remit-To *i*

Use this for Ship From address *i*

What is your Tax ID? *i*

Country

* VAT ID

I don't have a VAT/GST Number

Cancel

Save & Continue

Legal Entity Setup

- Click “Save and Continue”.

×

Where do you want to receive payment?

1 2 3 4

* **Payment Type** Address ▼

What is your Remit-To Address?

Address Line 1 addressuk1

Address Line 2

City cityuk1

State

Postal Code 87654

Country United Kingdom

Cancel Save & Continue

Legal Entity Setup

- If you unchecked box “**Use this for Remit-to**” at the earlier stage, you will see this view.
- If you want to modify or to add another remit-to address then click on “**Add Remit-To**” and fill in all fields marked with red asterisk.

×

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	addressuk1 cityuk1 87654 United Kingdom	Active	Manage

Deactivate Legal Entity Cancel Next

Legal Entity Setup

- If you unchecked box “**Use this for Ship From address**” at the earlier stage, you will see this view.
- If you want to modify or to add another ship from address then click on “**Add Ship From**” and fill in all fields marked with red asterisk.

×

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
addressuk1 cityuk1 87654 United Kingdom	Active	Manage

Deactivate Legal Entity Done


Legal Entity Setup

- You will receive below message, which confirms that the created legal entity can be used for invoicing.

Setup Complete ✕



Do you want to Add Remit-To Address to the invoice now?

To get paid - Most customers require that you send them this payment info in addition to providing it on the invoice. 

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Add Later

Add Now

Admin

- You can review your remit to addresses in the “Admin” section. In case you want to make changes in your remit to address, click on “Legal Entity Setup”.

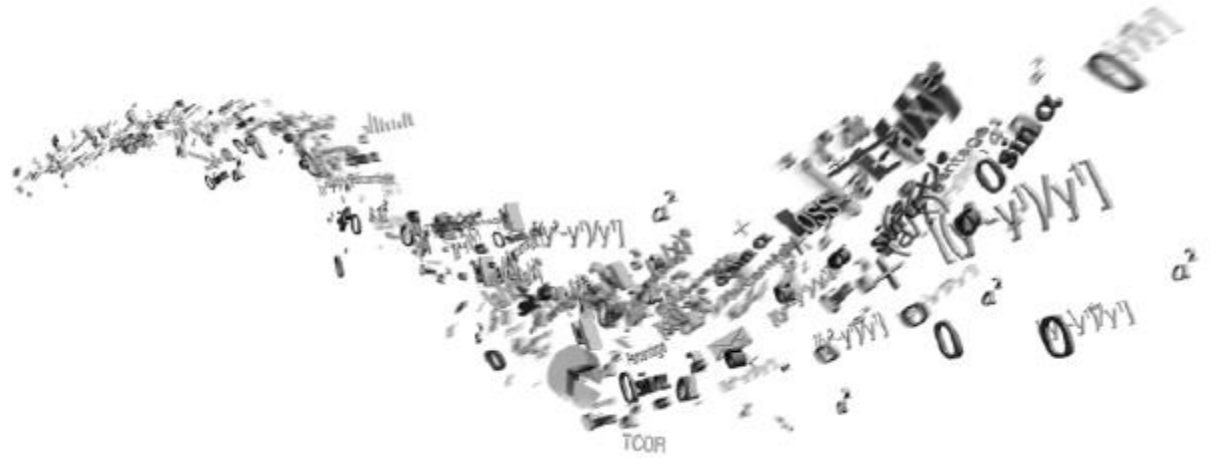


Admin Remit-To

To manage remit to addresses, please visit the [Legal Entity Setup](#) section

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To**
- Terms of Use
- Payment Preferences ▾

Remit-To Address		Banking information	Customers
Remit-To Location		Bank Testowy *****7654	Aon
Address:	adres1	12345	
	miasto1	*wert	
	Poland		
	98765		
	Preferred		
Language:			
	Polish		
	View Details		



Account Settings & Notification Preferences

Account Settings & Notification Preferences

- You can access and manage your account settings by clicking on the “**Account Settings**”, just under your user name.

The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo and text "coupa supplier portal". A blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. On the right, there is a user menu with "SUPPLIER" and "NOTIFICATIONS" above it, and a dropdown menu containing "Account Settings" (highlighted with a red box), "Notification Preferences", and "Log Out".

Below the navigation bar, the page title is "My Account Settings". On the left is a sidebar menu with "Settings" (selected), "Notification Preferences", and "Security & Two-Factor Authentication".

The main content area is titled "User Details" and contains the following form fields:

- * First Name:
- * Last Name:
- * Email:
- Department: (dropdown arrow)
- Role: (dropdown arrow)

A blue "Save" button is located below the form fields.

Below the "User Details" section is the "Change Password" section, which contains:

- * Current Password:
- * Password:

Below the password fields is the instruction: "Use at least 8 characters and include a number and a letter."

Account Settings & Notification Preferences

- You can manage notifications in the “**Notification Preferences**” section.
- If you want to be notified about a particular thing, just add a tick in the column “Online”, Email” or “SMS”.
- Notifications are turned off by default.

My Account Notification Preferences

Settings

Notification Preferences

Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

Announcements

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

Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Account Settings & Notification Preferences

- To receive SMS Notifications, validate your phone number in this section.
- Enabling Two-Factor Authentication, will allow you to use another form of identification to access your account and improve security (For more information visit [Coupa site](#)).

My Account Security & Two-Factor Authentication


Settings

Notification Preferences

Security & Two-Factor Authentication

Mobile Phone Verification

Mobile Phone : Not verified

 +1 201-555-5555

This phone will receive [SMS Notifications](#)

Validate

Two-Factor Authentication

SMS : Disabled

Verify your mobile phone to receive verification codes by text message

Enable

Two Factor Authenticator App : Disabled

Enable

Thank you!