Aon Supplier Enablement

# Coupa Supplier Training Materials

May, 2020

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AON

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.
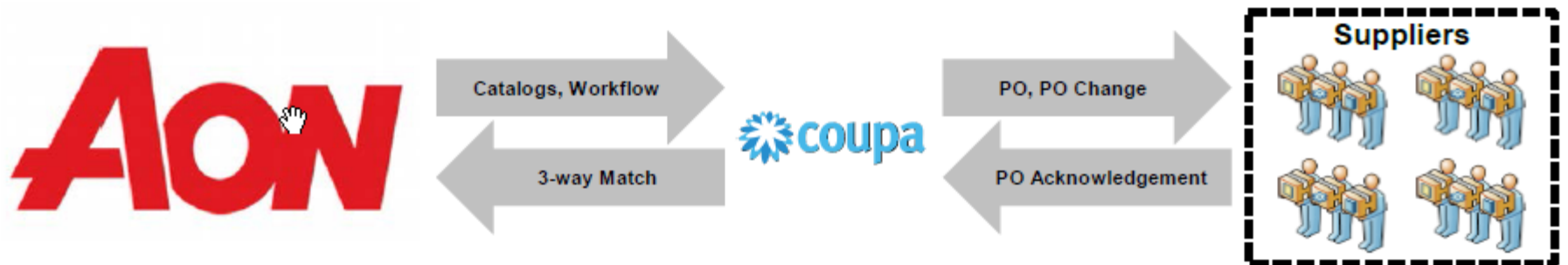
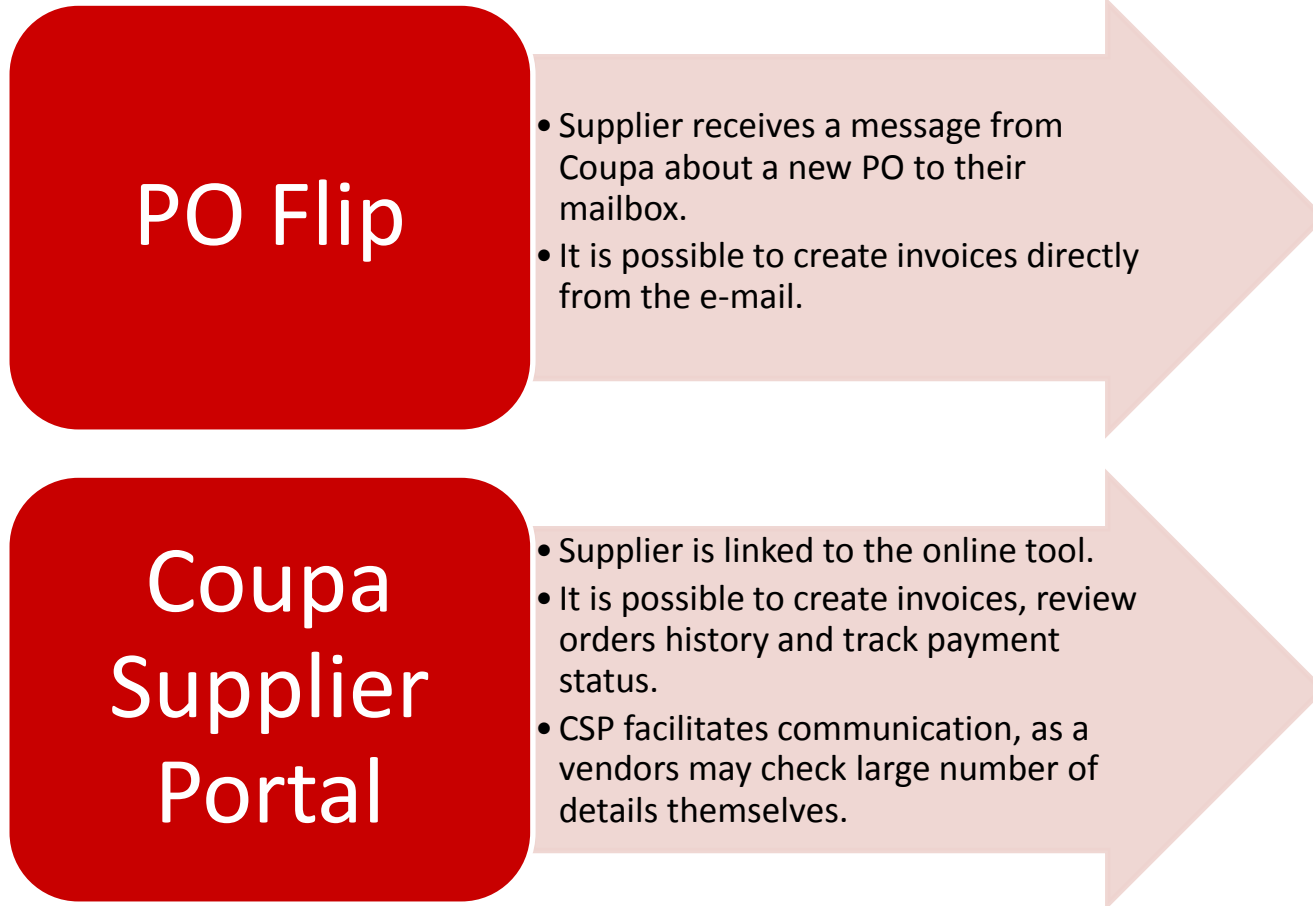## Additional Resources

Important sites and contacts:

- General Information: **www.aon.com** > About Aon > Supplier Information
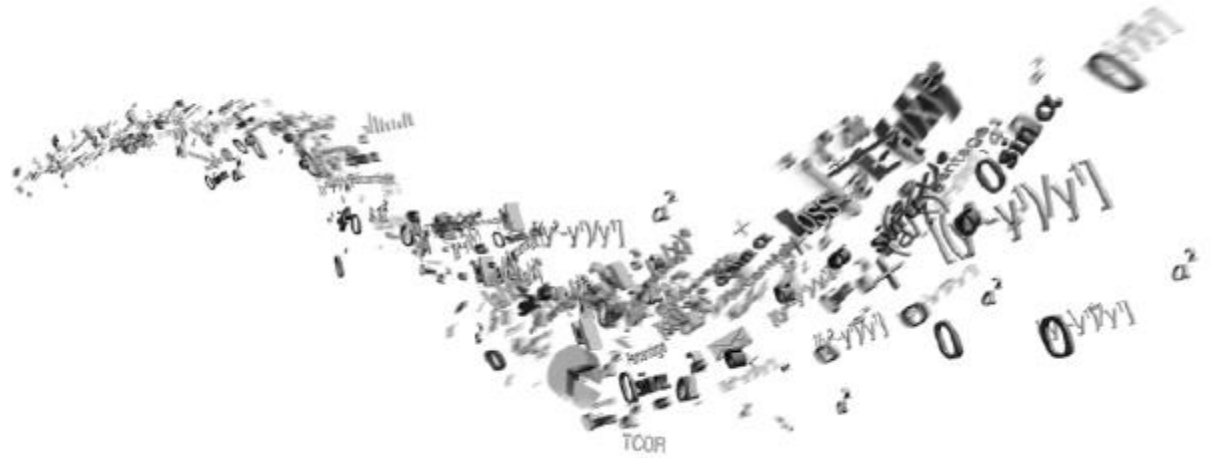
   For any issues and questions regarding Coupa Supplier Portal and invoices and payments: Global Spend Management Helpdesk **gsmhelpdesk@aon.com**

- 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

- Supplier receives a message from Coupa about a new PO to their mailbox.
- It is possible to create invoices directly from the e-mail.

Coupa Supplier Portal

- Supplier is linked to the online tool.
- It is possible to create invoices, review orders history and track payment status.
- CSP facilitates communication, as a vendors may check large number of details themselves.

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.

- "**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

- 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.
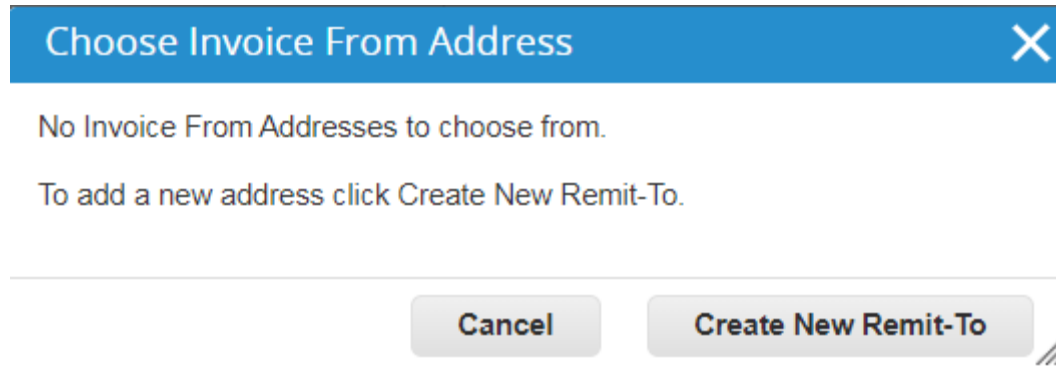
Choose Invoice From Address

No Invoice From Addresses to choose from.

To add a new address click Create New Remit-To.

Cancel   **Create New Remit-To**

PO Flip

- 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 ⓘ

☑ 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**

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

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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.

- **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

- 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
GB0041000187427-1

Contract
⌄

Supplier Part Number

Service Expiration Date
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%

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.

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PO flip– create invoice

- 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**
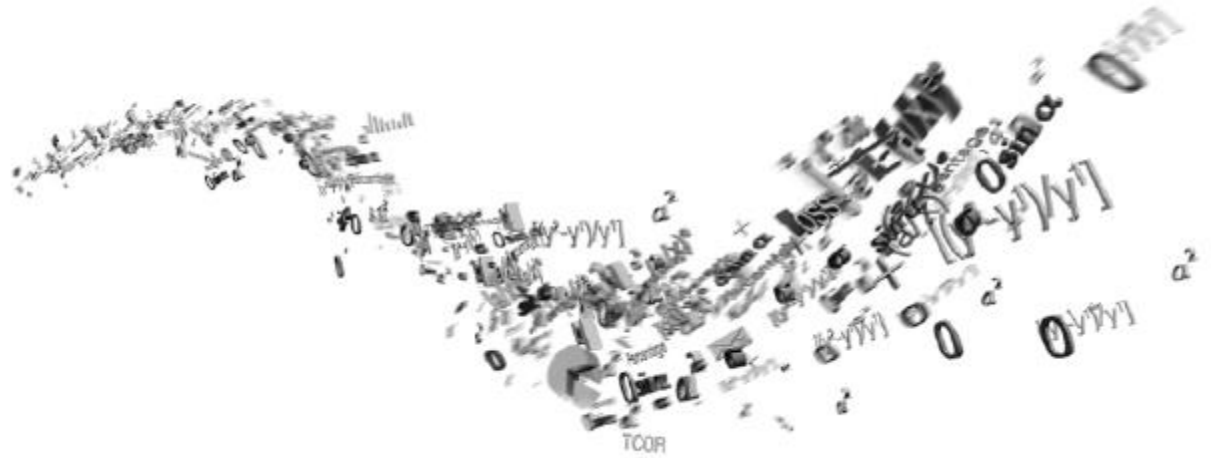
How to connect to CSP?

How to get connected to CSP?

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

Update Contact Details

- Notify Supplier Enablement team of key contacts*
- Primary contact, PO email, invoice email, banking details

Accept Invitation to CSP

- Will come from Coupa
- Will be delivered to the primary contact
- May land in junk mail
- Must be a unique email address

Update Account

- Add users
- Update profile
- Merge accounts

Transact with Aon

- Receive POs
- Invoice
- View payment details

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Profile update

Profile update

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

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**.

Profile update

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

General Information

* Name	SUPL-000012005-PL
Logo	[Select]
Profile Background	[Select]
Industry	Select an Option ▼
Year Established	
Short Description	
Full Description	
Registered Users	aonsupplier9@gmail.com ⊕ Add New
Web Site	
LinkedIn Profile	http://www.linkedin.com/company/99595
Facebook Profile	http://www.facebook.com/yourcompany
Twitter Profile	http://www.twitter.com/yourcompany

Address

Address Line 1	105193 Upgrade street
Address Line 2	
City	San Mateo
State	
Postal Code	11111
Country	United States ⌄

Primary Contact

* First Name	Supplier
* Last Name	Supplier
* Email	aonsupplier9@gmail.com
Work Phone	🇺🇸 ▼ +1 201-555-5555
Mobile Phone	🇺🇸 ▼ +1 201-555-5555
Fax Number	🇺🇸 ▼ +1 201-555-5555
PO Delivery Email	

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Receive & view orders

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Receive & view orders

- Click "**Orders**" in the menu bar, co 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**

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

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		🪙🪙

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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	Select

◎ 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	Search 🔍	**Sort by**	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.

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Receive & view orders

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 ⌄

AON

Receive & view orders – create invoice

Choose Invoicing Details ✕

* Legal Entity   testuk   ⊕ Add New

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

* Remit-To   Select   ⊕ Add New

* Ship From Address   Select   ⊕ Add New

Cancel

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.

AON

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.

- **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.
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Create invoice

- 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

- 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

- 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-_____-GB invoice #test1uk is processing ✕

Create Invoices ⓘ

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

View All ▾   Search 🔍

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

AON

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		🪙 🪙

AON

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.

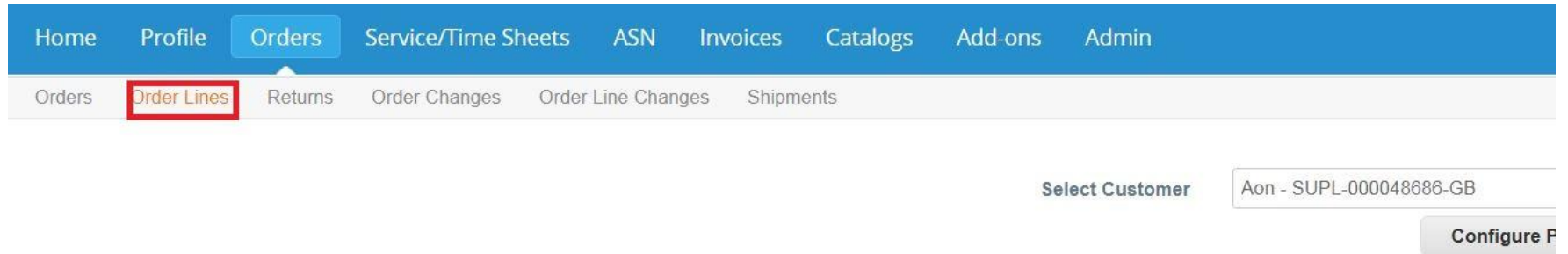Enter a number and date of the original invoice.

Create credit note

- 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

Export to ˅   View All ˅   Search

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

AON

Invoices

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.

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.

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.
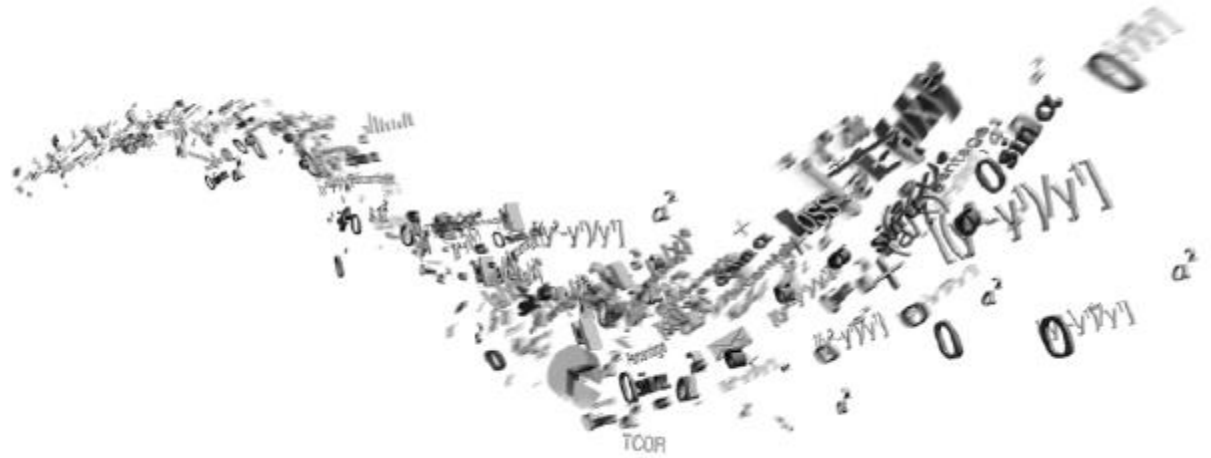
Catalogs

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.

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.

Admin

- 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**".

CSP – how to merge accounts

- Type in the e-mail address of a person whose mailbox is linked to the other Coupa account.

- Click "**Send Request**".

Request Account Merge

You're about to merge your profile and users with   . Select the owner for the
merged account. For more info on merging, Click here.

* Account Owner ⦿ My Account

    ◯ Their Account

    By choosing this option I understand that I will no longer be the account owner.

* Note | test

    ✓ I'm not a robot   reCAPTCHA
                                      Privacy - Terms

    Cancel   **Send Request**

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**".

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).

- 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.

CSP – how to merge accounts

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.

- 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.

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

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Admin

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

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	testuk
Country	United Kingdom

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

Cancel   Continue

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Legal Entity Setup

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

Miscellaneous Information

1 2 3 4

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	testuk
Country	United Kingdom
* Type of Company	LTD.
Board of Directors	

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

Cancel   Save & Continue

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Legal Entity Setup

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

Tell your customers about your organization

1 **2** 3 4

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).

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

AON

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]

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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.

Legal Entity Setup

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

Setup Complete

1 2 3 **4**

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 **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

AON

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**".

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.

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.

AON

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**).

Thank you!

AON