Coupa Supplier Frequently Asked Questions (FAQs)

Updated: May 25, 2018

Signing Up For the Supplier Portal

- **How much does it cost to join?**
  Coupa does not charge suppliers to use the portal.
- **Where do I register?**
  You can request an invitation to join the Coupa Supplier Portal. Have Aon send you an invitation email or visit https://supplier.coupahost.com.
- **Where do I sign in?**
  http://supplier.coupahost.com

Coupa Supplier Portal Basics

- **How do I know I'm connected to Aon?**
  After you have signed into the portal, scroll down to the bottom right side of the page. From here, you'll see your **Latest Customers**.
- **How do I see my Aon's purchase orders?**
  Click on the **Orders** in the menu. If you are connected to more than one Coupa customer, select Aon's name from the dropdown menu.
- **Where can I find payment information?**
  Click on the **Invoices** in the menu. Payment status will be on the invoice above the line item description.
- **If I use the CSP who pays me?**
  Aon is still responsible for paying you directly. Coupa does not pay suppliers on behalf of buyers.

Purchase Orders

- **How do I create an invoice that isn't backed by a purchase order?**
  You can only send non PO-backed invoices if Aon has you set up for it. Contact the Supplier Enablement team at gsmhelpdesk@aon.com and ask to be able to create invoices without a backing document.
- **How do I change a price on a purchase order?**
  You cannot change a price on a PO through the CSP. If you need to change the price/order for a PO, talk to your customer about altering the order.
- **How do I invoice a blanket purchase order?**
  You can invoice multiple times against a single PO. Just click the stack of yellow coins icon next to the chosen the PO as you normally would, and enter the amount you'd like to have on the invoice. Next time you want to invoice against this PO, just do the same thing.
- **Can I set it the way that I can only see purchase orders that have not been invoiced yet?**
  Currently, you are unable to filter purchase orders based on their invoiced status.
- **What is the purpose of PO acknowledgment by the supplier?**
  You can let your Aon customers know that you've received the order. Some Aon customers like their suppliers to use that field and it will generate an email notification to them. Ask them if they want you to use it.
- **How many times will Coupa try to resend a PO that wasn't able to be sent?**
  If a PO transmission results in a connection timeout because there was no response from the supplier, Coupa will try to resend the PO up to four times at five minute intervals.

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Invoicing

- **How do I create an invoice?**
  In the CSP, select **Orders**. In the **Select Customer** dropdown, choose the desired customer. In the PO table that appears, choose the PO you would like to invoice, and then click the yellow coins to create an invoice.

- **How do I create an invoice if there's no purchase order?**
  Most invoices submitted to Aon will require a purchase order. However, if you have approval and are properly configured in the system to do so, click on the **Invoices**. In the **Select Customer** dropdown, choose the desired customer. Click **Create** on the page that appears.

- **Can I reuse an invoice number once my customer has deleted it on their end?**
  Yes, Aon has deleted an invoice number, you can reuse it.

- **How do I know if an invoice has been registered?**
  In the menu select **Invoices**. For Aon, look for invoices that are still listed as drafts. They need to be edited and then submitted. If the invoice is not there, then it's not in the system.

- **What does the status "Tolerance Hold" on an invoice mean?**
  It means your invoiced amount differs from the PO by more than Aon allows without manual approval. If an invoice has been on hold for a while, ask your Aon customer to review it.

- **Why can't I edit, void, or delete an invoice?**
  Once an invoice has been submitted, it cannot be changed in any way. However, you still have options:
    - Ask your customer to reject or void the existing invoice. You can then create a new one.
    - Create a new credit memo that credits the customer for the original value, and then create a new invoice.

- **How do I add shipping charges to an invoice?**
  Add your shipping charges at the bottom of the invoice.

- **How do I make a partial claim on an invoice?**
  You can invoice multiple times against a single PO. Just click the gold coins icon and enter the amount you'd like to have on the invoice.

- **How do I create a credit memo?**
  To create a credit memo, sign in to the Coupa Supplier Portal and select **Orders**. Choose the PO you would like to create a credit for and select the stack of red coins.

- **How do I credit or cancel an invoice that's already been billed?**
  Once an invoice is submitted, it cannot be changed in any way. See "How do I create a credit memo?" or "Why can I not edit, void, or delete an invoice?" above for more info.

- **What does the Export button do?**
  You can export the rows to an Excel document.

- **Do I need to include accounting information on cXML invoices?**
  Invoices against a PO do not need accounting information, since that info is part of the requisition, and is carried over to the PO. When an invoice references a PO line number, Coupa takes the accounting information associated with the line and adds it to the invoice.

Getting Paid

- **Once an invoice has been approved, what do I need to do next?**
  Nothing. The invoice is in Aon's queue and you will be paid based on the payment terms with Aon.

- **What do I do if an invoice was rejected?**
  If it is not clear, connect with your customer to determine why the invoice was rejected in the first place and then create a new invoice to replace the one that was rejected.
- **What if I have an invoice that has not been paid?**
  If your invoice is within terms, you will need to wait until those term requirements are met before receiving payment. If your invoice is past due, contact your Aon customer directly to investigate.

Catalogs

- **How do I learn about hosting my catalog within Coupa?**
  Reach out to our Help Desk at gsmhelpdesk@aon.com and express about setting up a catalog. Suppliers with successful catalogs have fixed pricing set with Aon and are able to invoice in the same way that the catalog it set up. It is also mandatory that you have a contract in place with Aon to set up a catalog.
- **Do I need to see a purchase order on the Coupa Supplier Portal before I can invoice?**
  Yes you will need a purchase order prior to invoicing your Aon customer.
- **How do I implement cXML punchout on my website?**
  You'll need a dedicated cXML developer or a 3rd party consultant, to make your website cXML compliant. Once your site is cXML ready, provide your credentials to your customer. They will handle the rest. You can get more information at http://cxml.org

Managing your CSP Account

- **How do I add an employee?**
  From the menu, select **Admin**. Choose the **User** tab and click **Invite User**. Provide the required info in the window that opens.
- **How do I update my banking information for direct deposits?**
  Your banking information is stored in Aon's ERP system (Workday), and not stored in Coupa. Contact gsmhelpdesk@aon.com with the updated information.
- **What options are available for me to submit invoices to my customers?**
  Aon offers the following methods to submit invoices:
    - The Coupa Supplier Portal, where you sign in to flip a PO to create an invoice
    - cXML, where you can automate the process of sending an invoice file using Coupa's standard cXML format
    - Supplier Actionable Notifications, where you invoice directly from the emailed Purchase Order by flipping it to an invoice
    - Other set ups are available on a limited and one-by-one basis.
- **How do I delete my CSP account?**
- If you are no longer doing business with the customer who set you up on the CSP, ask them to make you inactive in their system.