



Quick Reference: Supplier

Overview

The introduction of Coupa and the new Procure-to-Pay processes will help to drive automation and dramatically reduce time and effort for both Aon and its Suppliers. There are two ways to transact with Aon – via the Coupa Supplier Portal or email. Both processes are outlined below.

CSP

The Coupa Supplier Portal (CSP) is an online tool that serves as the interface between the Suppliers and Aon. This will provide increased visibility throughout the ordering and invoicing processes. Suppliers can handle the following transactions in CSP:

- Receive & View Orders
- Acknowledge Orders
- Create Invoices and Credit Notes
- Manage Catalogs

Invoicing

With the help of Coupa, Suppliers will be able to quickly receive and acknowledge Purchase Orders (POs), and invoice against those orders. With invoice matching capabilities and invoice tolerance checks, Coupa will significantly improve the invoicing process. CSP Suppliers are able to create their invoice, or directly flip a PO to an invoice. Suppliers can even view or report the status of their invoices.

The most preferred option for invoicing is CSP. Coupa will automatically '3-way match,' this allows the system to match the PO, receipt, and invoice. Once matched, the invoice will pay according to Aon's standard payment terms, or to the payment terms contractually agreed upon between Aon and the supplier. Payment details will be reflected in Coupa and the CSP. This process will help cut the wait time for payments.

Quick Reference Cards

The job aids will outline what to expect and also user friendly steps for the following:

- PO Transmission and Acknowledgement
- Create Invoices
- Create Credit Notes

Key Terms

Key Term	Description
Coupa Supplier Portal (CSP)	An online portal hosted by Coupa that enables suppliers to do business with organizations that use Coupa. Suppliers registered with Coupa can receive purchase orders, send invoices, create catalogs with preferred pricing, and manage profiles and remit-to information.
Purchase Order (PO)	A purchase order is the request for goods or services that is sent to the supplier. After a purchase requisition has been approved by all necessary parties, a purchase order is generated from the details of the requisition, which includes the requester's name. A unique number is also generated to identify the purchase order, which suppliers need to include on their invoice.
Flipping a PO	Ability to 'flip a PO' via CSP and email: Flip your incoming PO into invoices from CSP or from your email. This is the easiest method to submit electronic invoices through Coupa. You can also acknowledge and comment on POs directly from the email.
E-Invoicing	<p>An electronic invoice should contain data from the supplier, in a format that can be entered (integrated) into Coupa system without requiring any data input from the Aon's AP administrator. Please see the following guidelines of what this means in Coupa terms:</p> <ul style="list-style-type: none"> ▪ An e-invoice: <ul style="list-style-type: none"> ○ Invoice data issued via Direct Connection (in Electronic Data Interchange (EDI) or XML formats) ○ Invoice data issued via Coupa Supplier Portal ○ Invoice data issued via Supplier Actionable Notifications – suppliers are able to convert a PO into an invoice right from their email ▪ Not a true e-invoice: <ul style="list-style-type: none"> ○ Invoice data issued in PDF or Word format ○ Paper invoice sent via fax machines ○ Scanned paper invoices