Coupa Supplier Portal
User Guide

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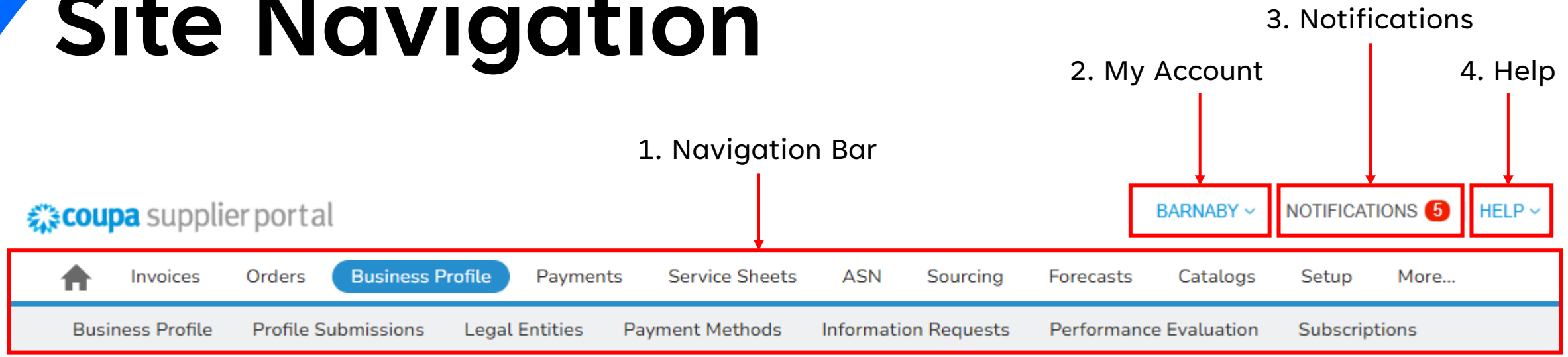
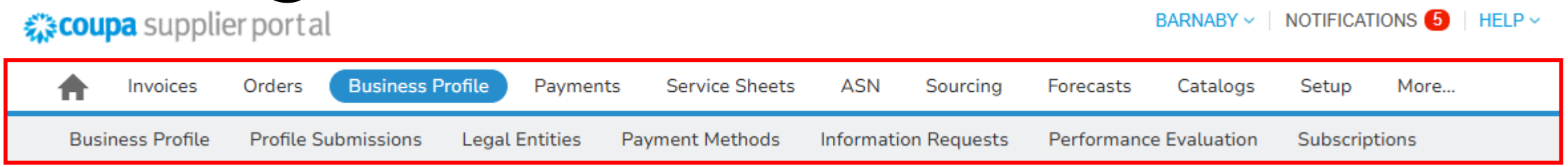
Site Navigation

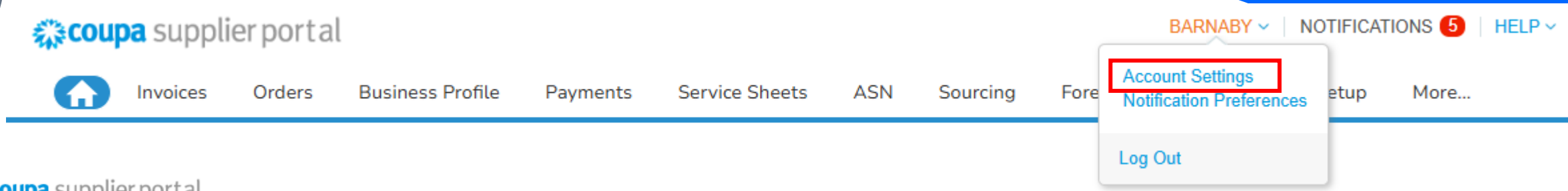


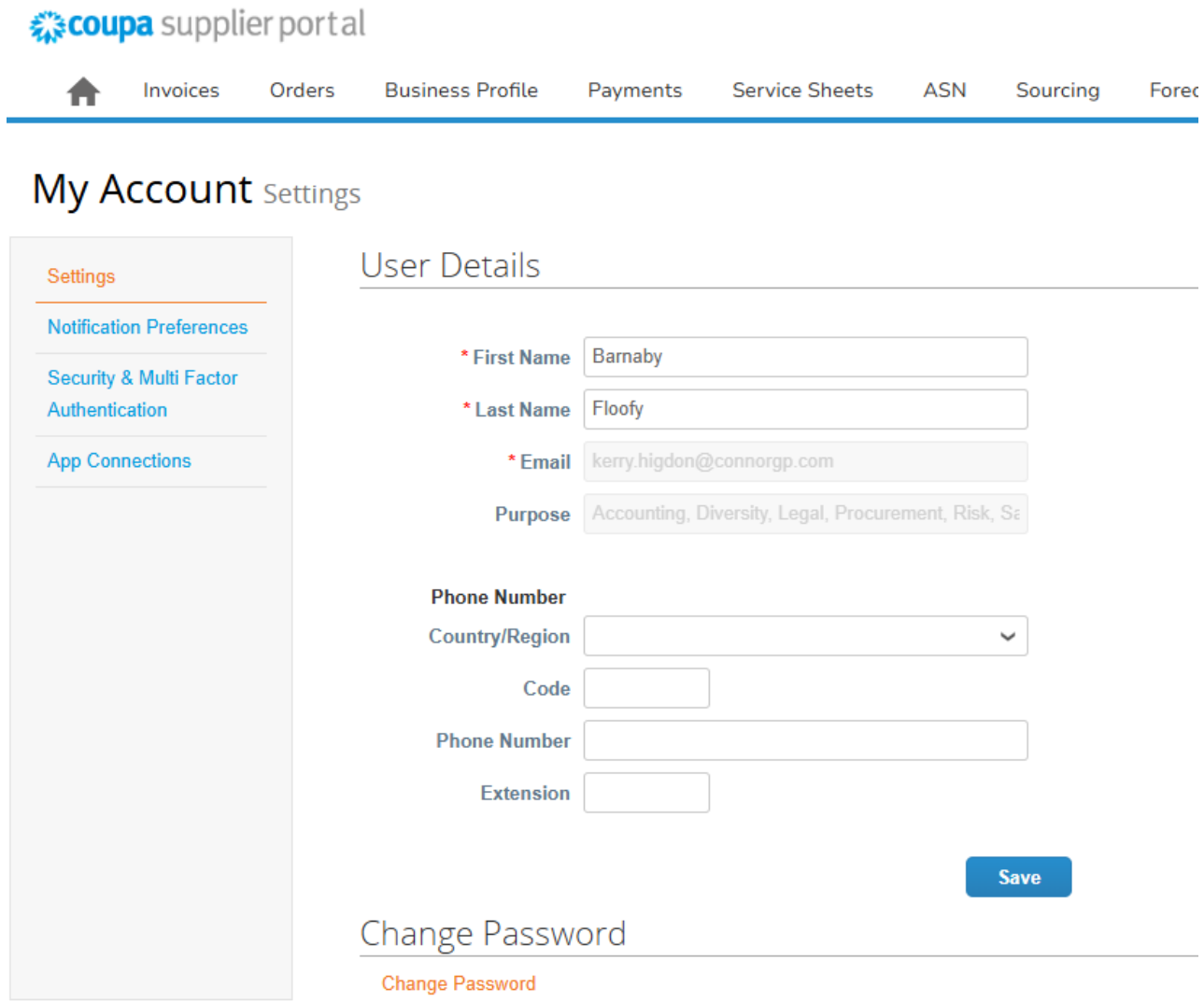
1. **Navigation Bar** – Home, Profile, Orders, and Invoices
2. **My Account** – Manage the platform and change passwords to your CSP account
3. **Notifications** – Confirm your preferences for notifications
4. **Help** – Standard Coupa videos and training modules

Navigation Bar



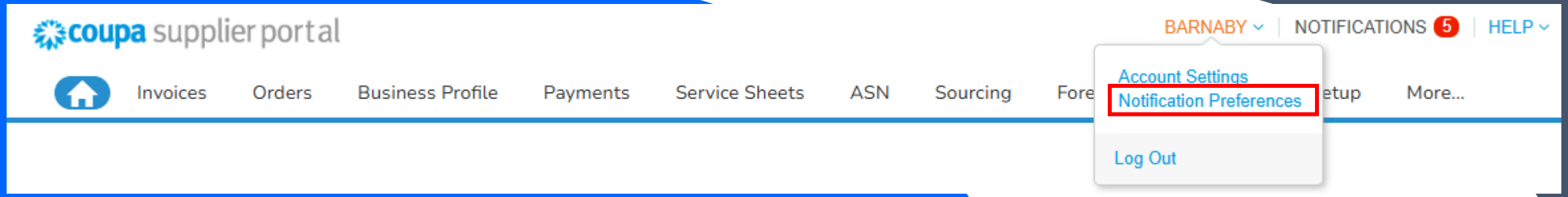
- **Business Profile** – Manage your public profile for transacting with customers in Coupa
- **Orders** – Manage purchase orders
- **Invoices** – View all created invoices and their current status
- **Setup** – User information (invite, add, or remove users) and Merge Requests (merge or unmerge other accounts)





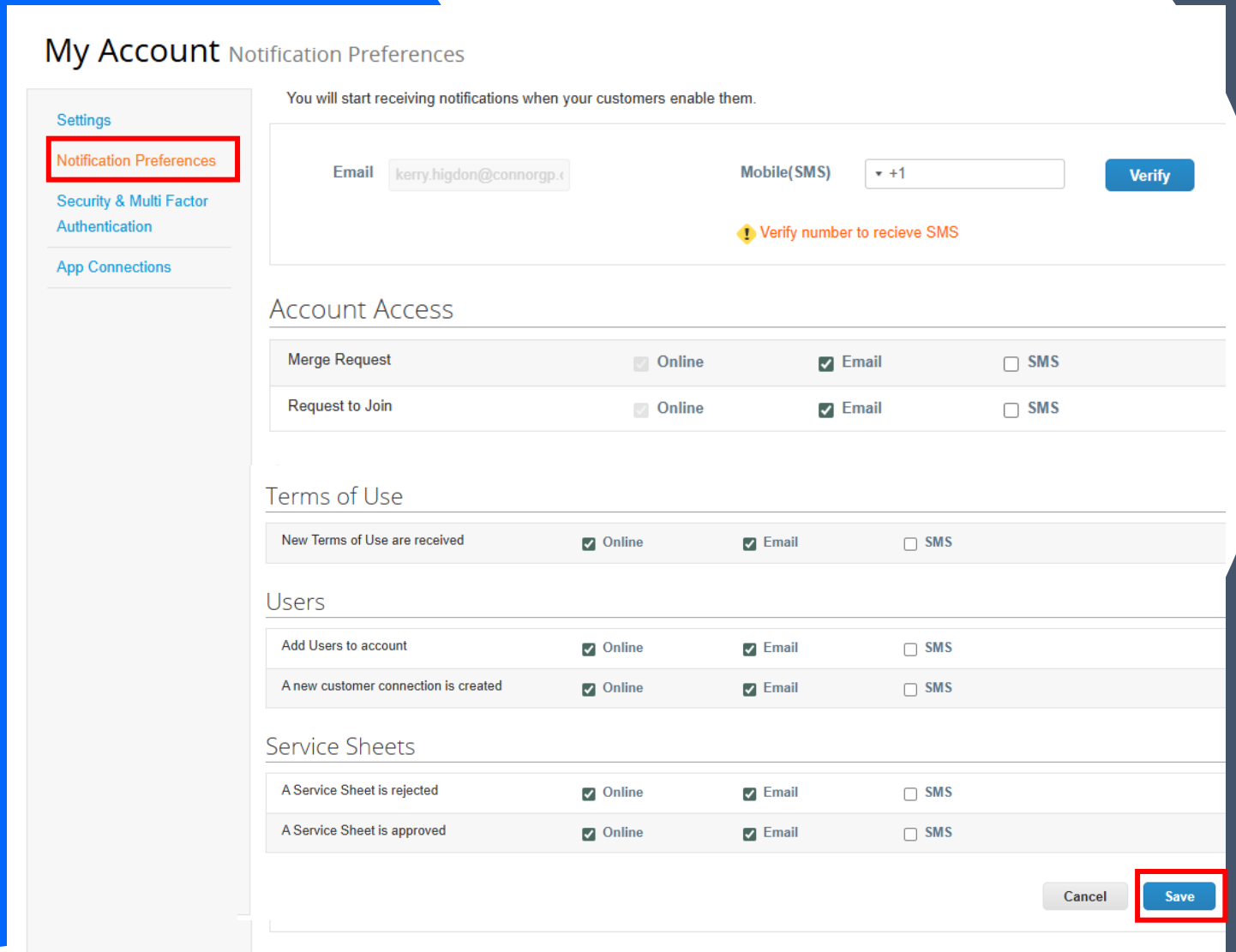
Account Settings

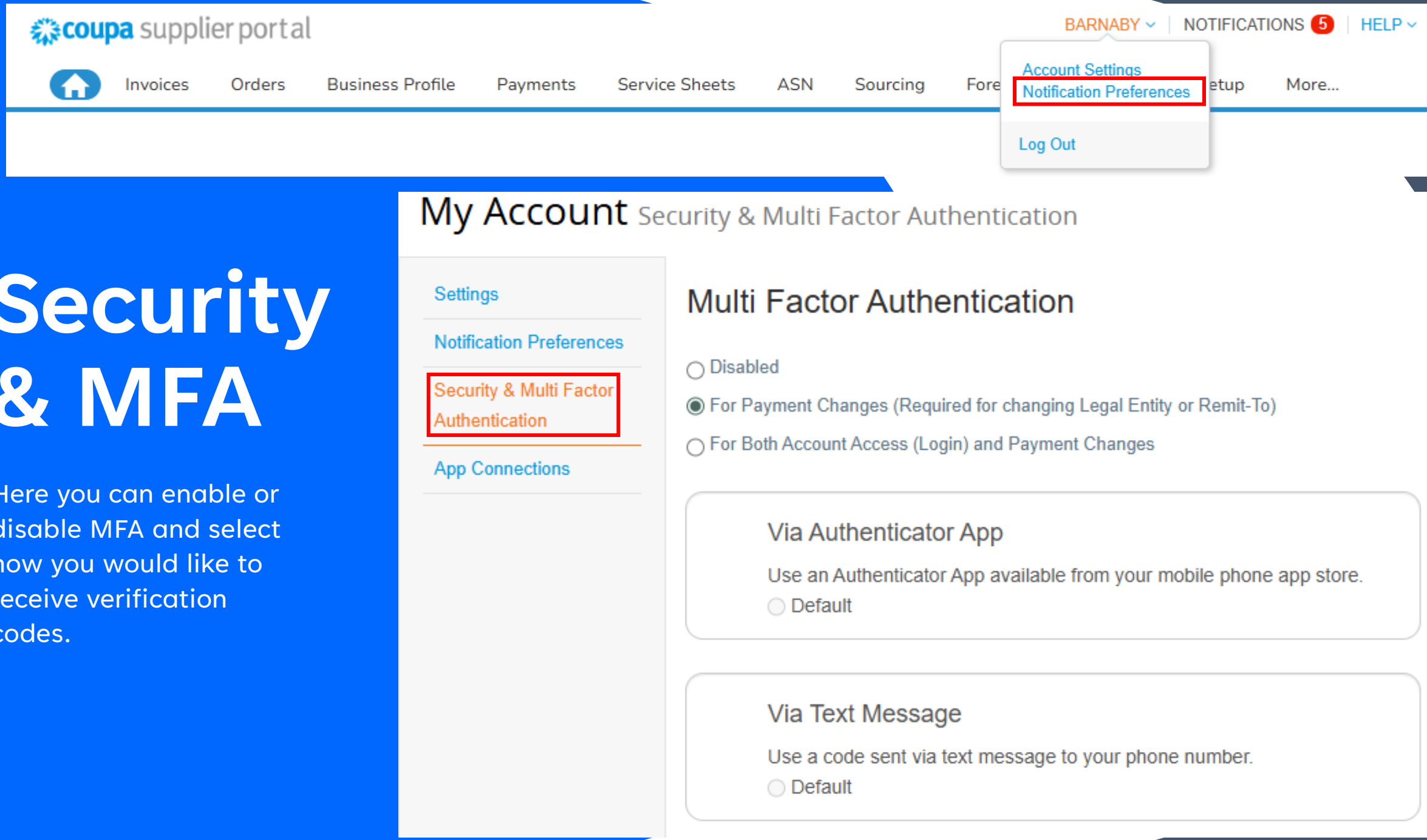
- **User Details** – Check that information is correct and update as needed.
- **Change Password** – Option to change your password if needed.



Notification Preferences

Here you can manage the way you receive notifications by enabling or disabling individual options. Grayed out fields cannot be changed.



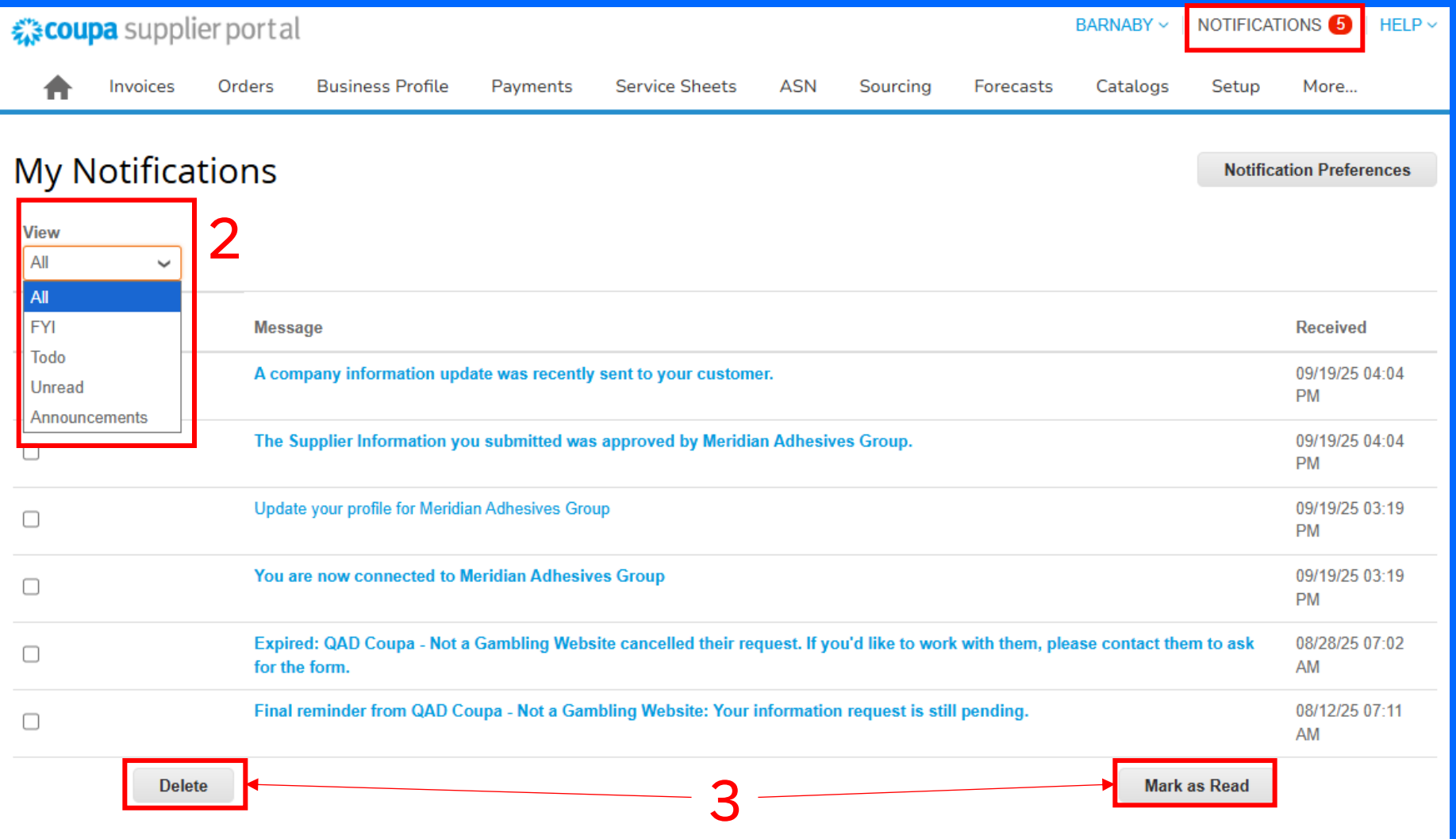


Security & MFA

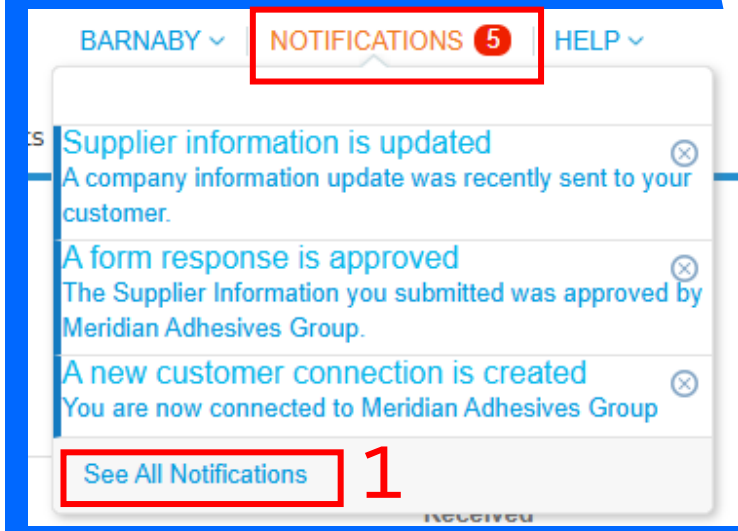
Here you can enable or disable MFA and select how you would like to receive verification codes.

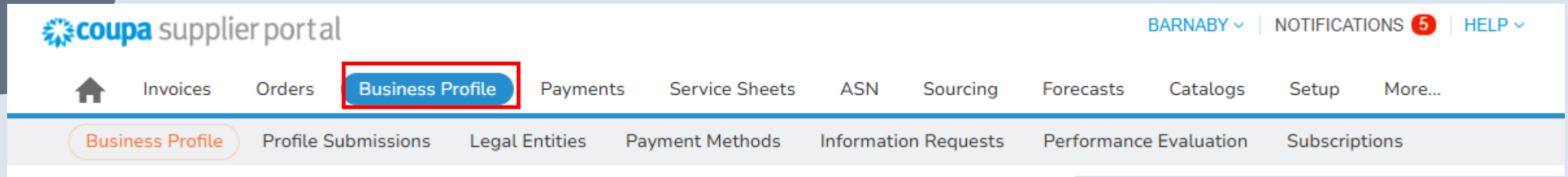
Notifications

Select All from the View dropdown to see all of your notifications.
You may delete them or mark them as read.



Hover over the Notifications link to see your three most recent unread system messages.





Totally Legitimate Business

Profile Preview | Copy Profile URL | Download as PDF

Share Profile

Company Info

Company Name Totally Legitimate Business	Industry	About
Tax ID United States - 111111111	Year Established	Commodities
Products and Services	PO Email	Website
DUNS	Company Size	Ownership Type
Areas Served	No coverage in areas	

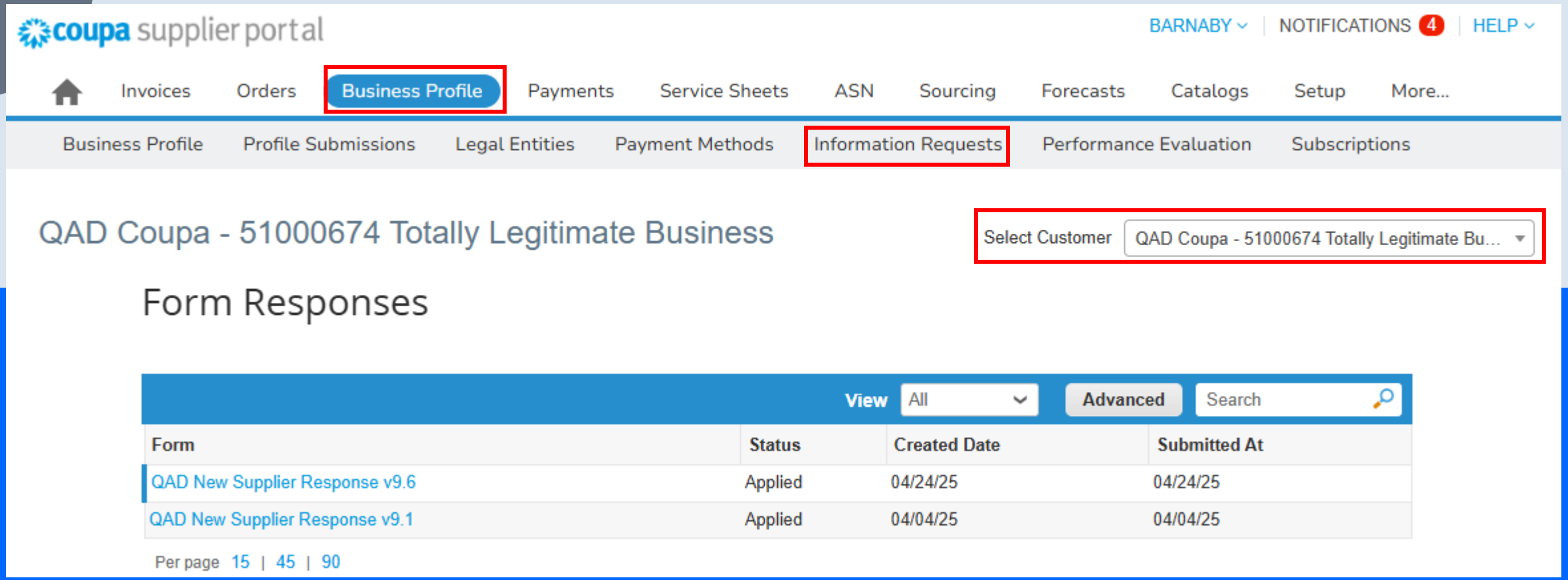
Contacts

Addresses

Profile

Here you can manage your public profile on the Coupa Portal.

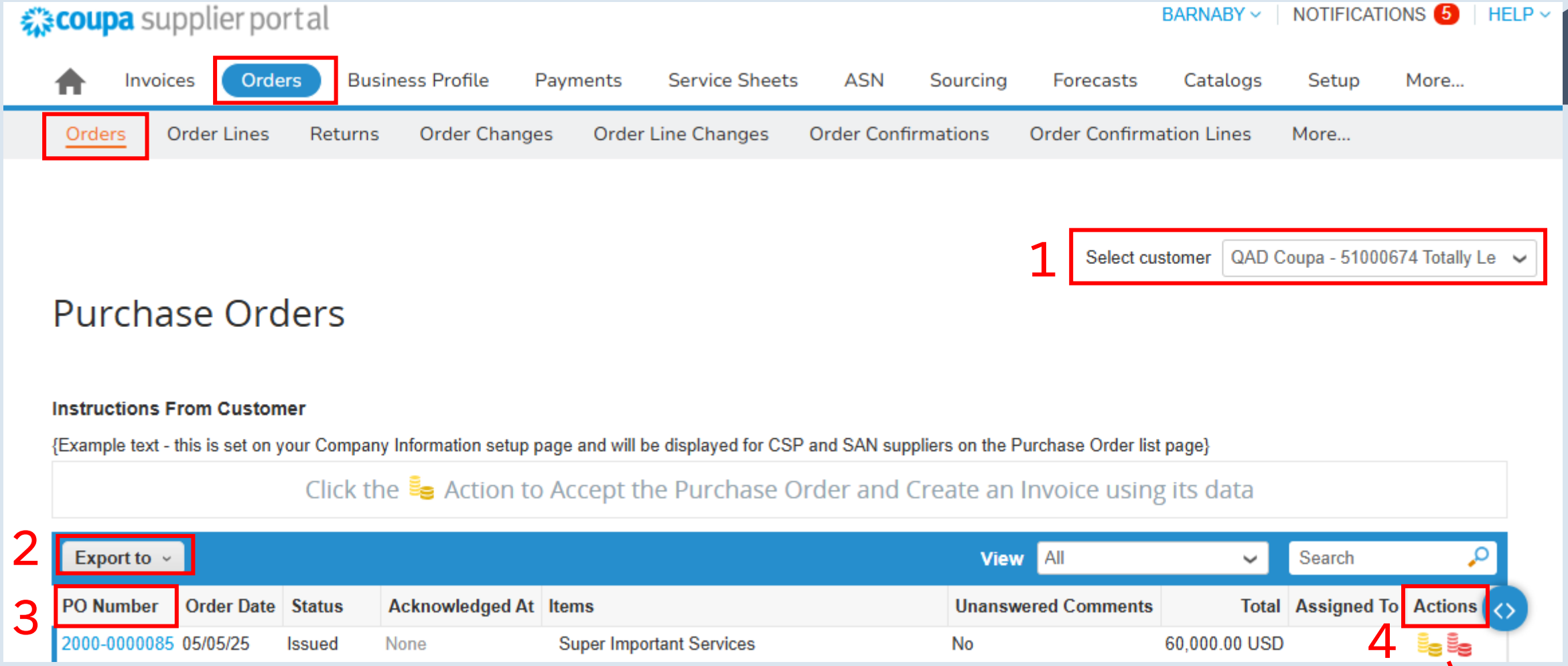
Your public profile is visible to Coupa users in the Supplier Directory.



Information Requests

Customers will often ask you to supply information to ensure they have accurate contact, billing, and other specific records. To complete an information request, navigate to the Form Responses page and select the appropriate customer. Click on the form you wish to complete and submit it when finished.

Orders

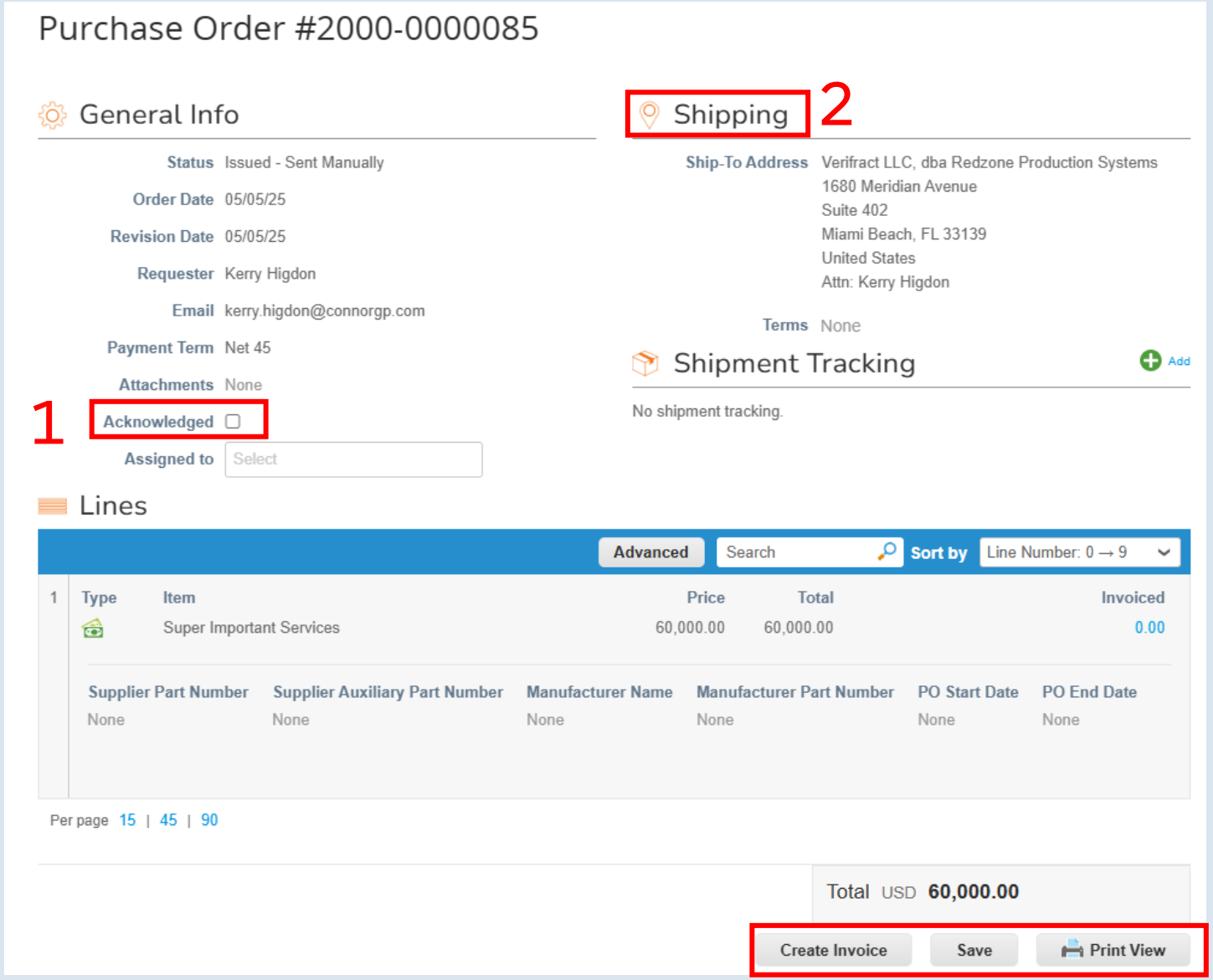


1. **Select Customer –** Use the drop-down to select the specific customer you would like to view.
2. **Export to** – Export an Excel report
3. **PO Number** – To view details of the order, click on the order number you wish to review.
4. **Actions** – Create invoices or credit notes

Create an invoice

Create a credit note

Orders



1. **Acknowledged** – Check the box to acknowledge acceptance of the purchase order.
2. **Shipping** – Address linked to the purchase order
3. **Actions** – Create an invoice, save changes, or print the purchase order

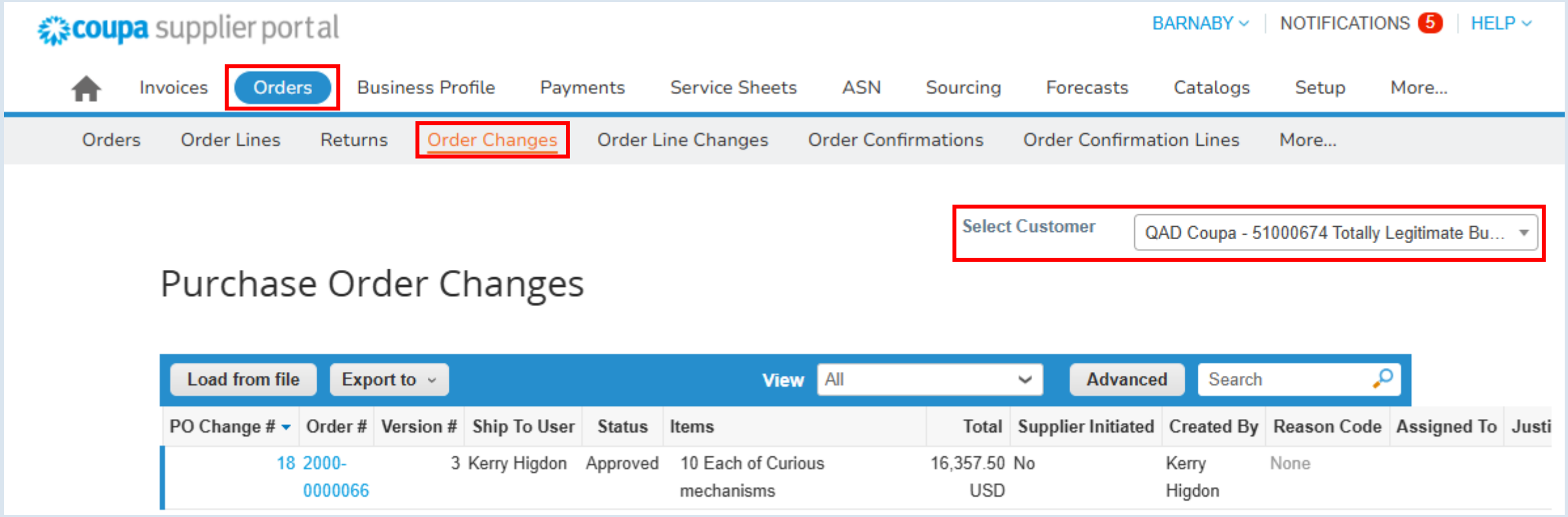
Orders

Purchase orders can have the following statuses:

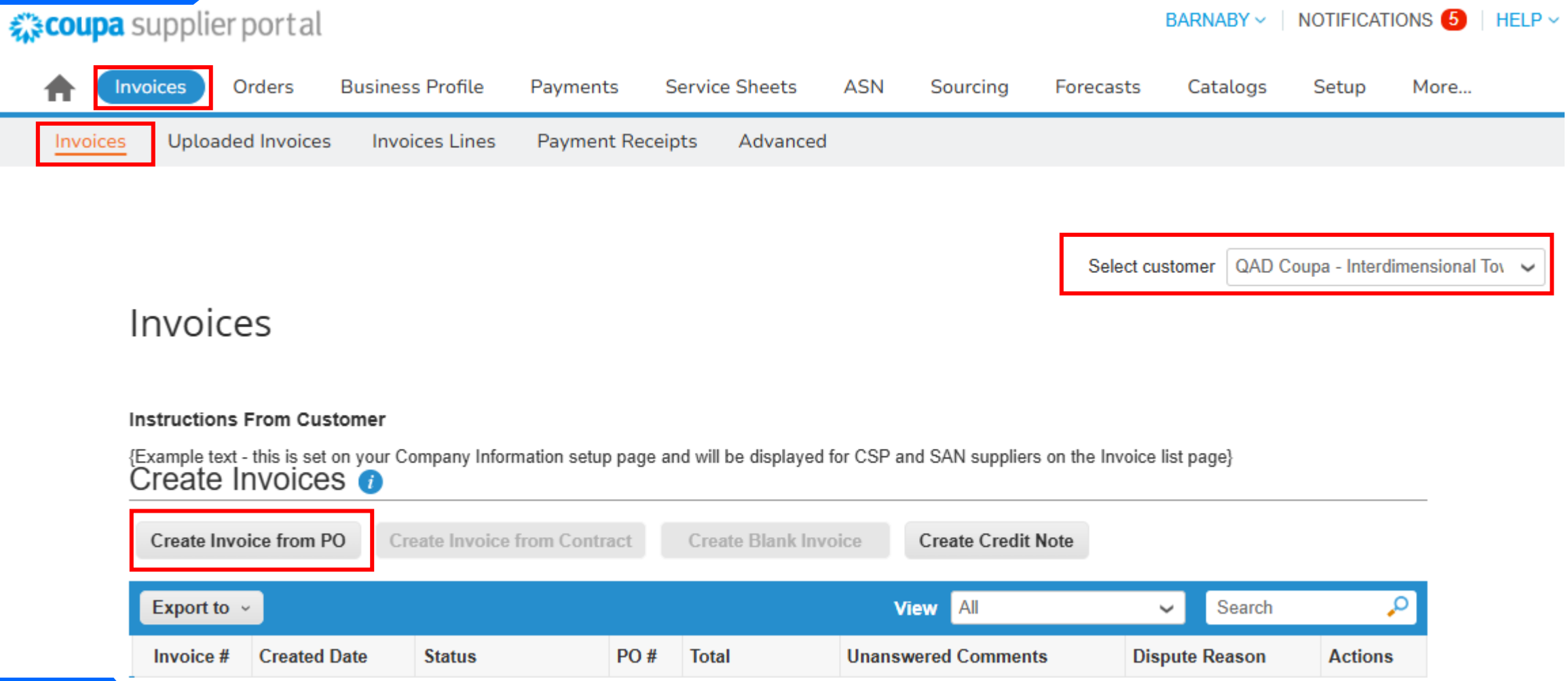
- **Issued** – The PO was approved and sent to you for fulfillment.
- **Buyer Hold** – The PO is approved but requires your Coupa customer to review it.
- *Please ensure you have completed any information requests sent to you by your customer, as this can also create a Buyer Hold.
- **Soft Closed** – The PO is closed but can be reopened. You cannot invoice against a PO in this status.
- **Closed** – The issued PO was received and then closed, either manually or automatically within Coupa.
- **Cancelled** – The PO was cancelled and does not need to be fulfilled.
- **Error** – Something is wrong with the PO. Contact your customer to get the PO back on track.

Purchase Order Changes

Here you can view changes made to purchase orders. Be sure to check that the correct customer has been selected.



Invoices



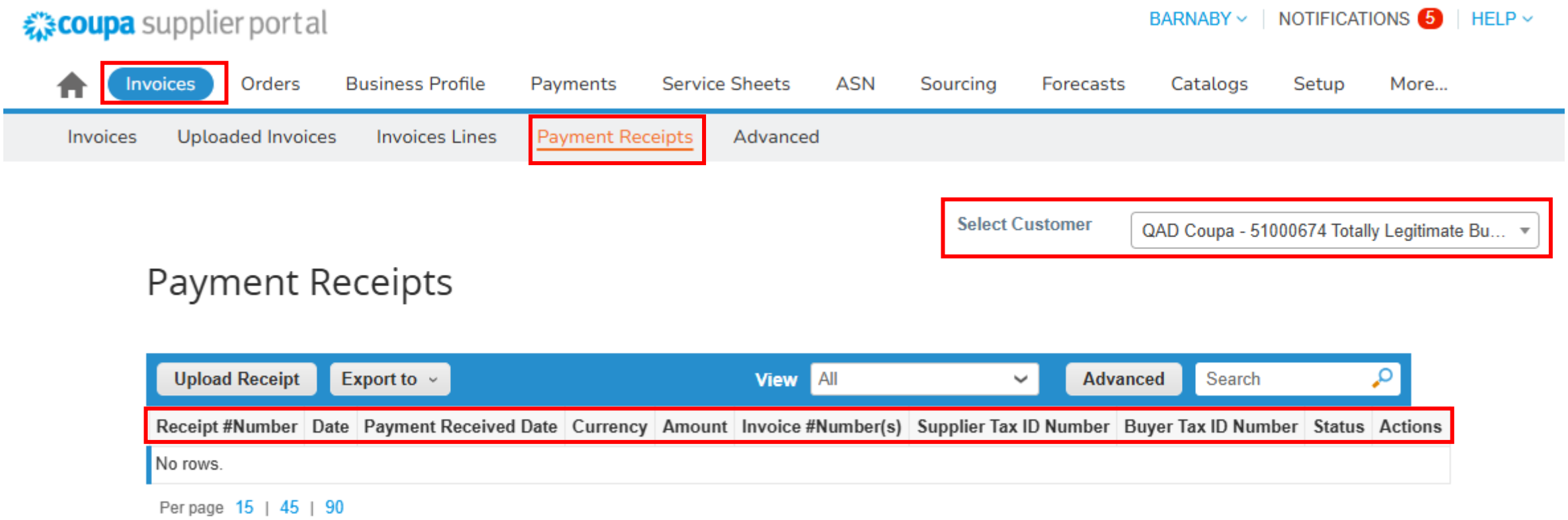
Here you can view invoices that have been created. Ensure that you have selected the correct customer when searching for invoice records.
Most customers will not permit the creation of blank invoices and will require you to create invoices from POs.

Invoices

Invoices can have the following statuses:

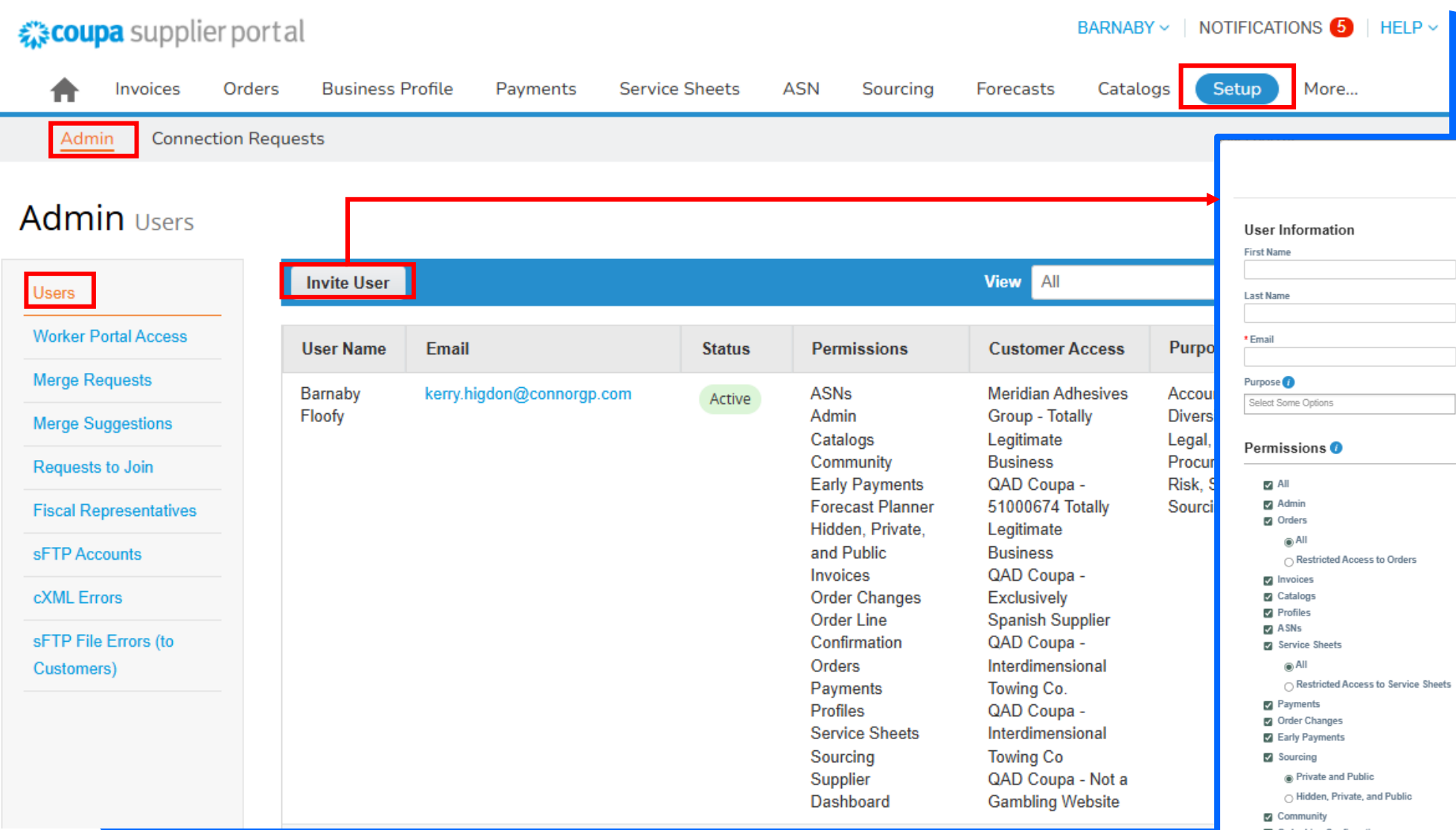
- **Draft** – The invoice has been created, but not yet submitted to the customer and can still be edited.
- **Pending Approval** – The invoice is currently under review and awaiting approval for payment by the customer.
- **Approved** – The invoice has been accepted/approved for payment by the customer.
- **Processing** – The invoice is being processed by AP and should be paid soon.
- **Disputed** – The invoice has been disputed by the customer.
- **Voided** – The invoice is not valid, something is wrong (the status of invoices after resolution of a disputed invoice).

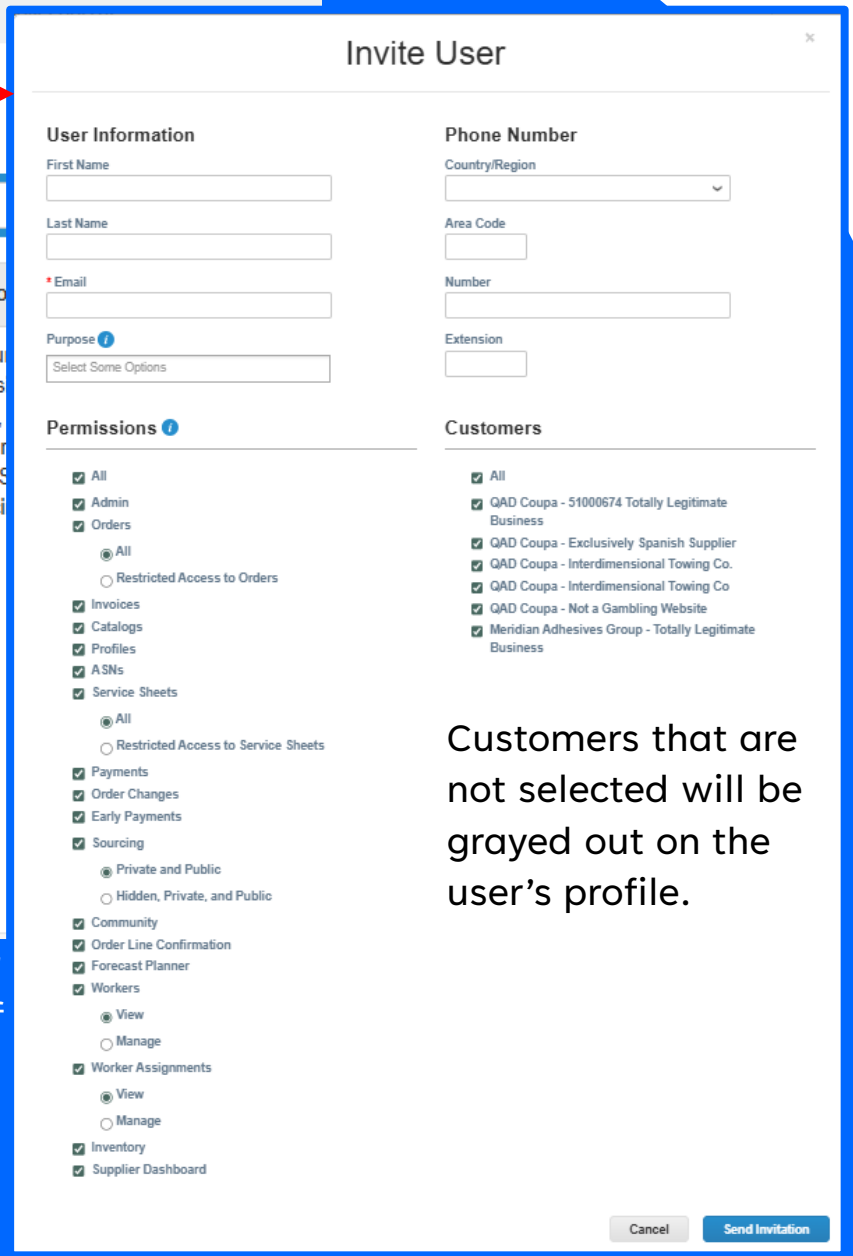
Payment Receipts



Here you can view the status of your payments by navigating to the payment receipts tab. Each payment is linked to the associated invoices for easy reconciliation.

Setup

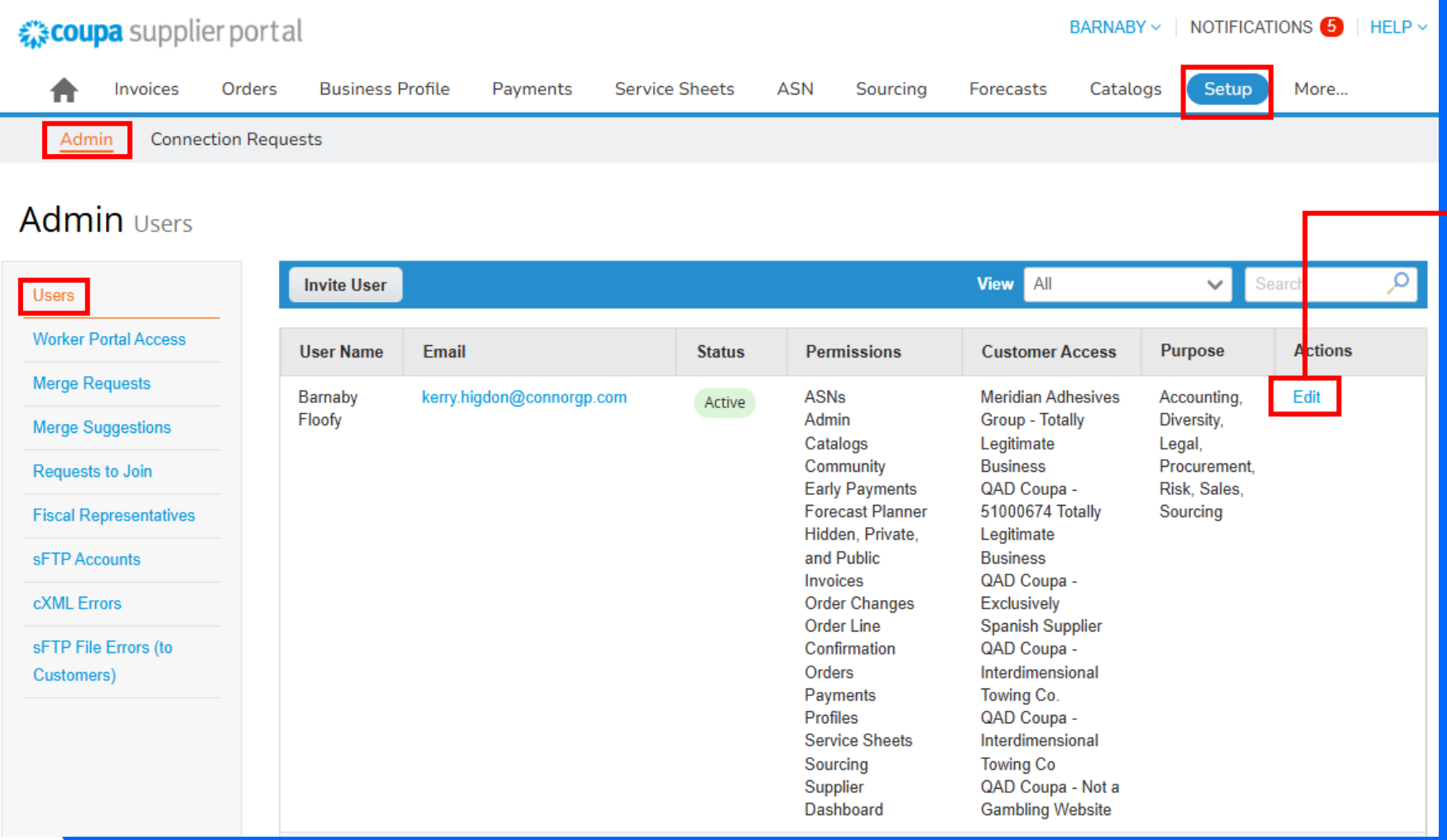


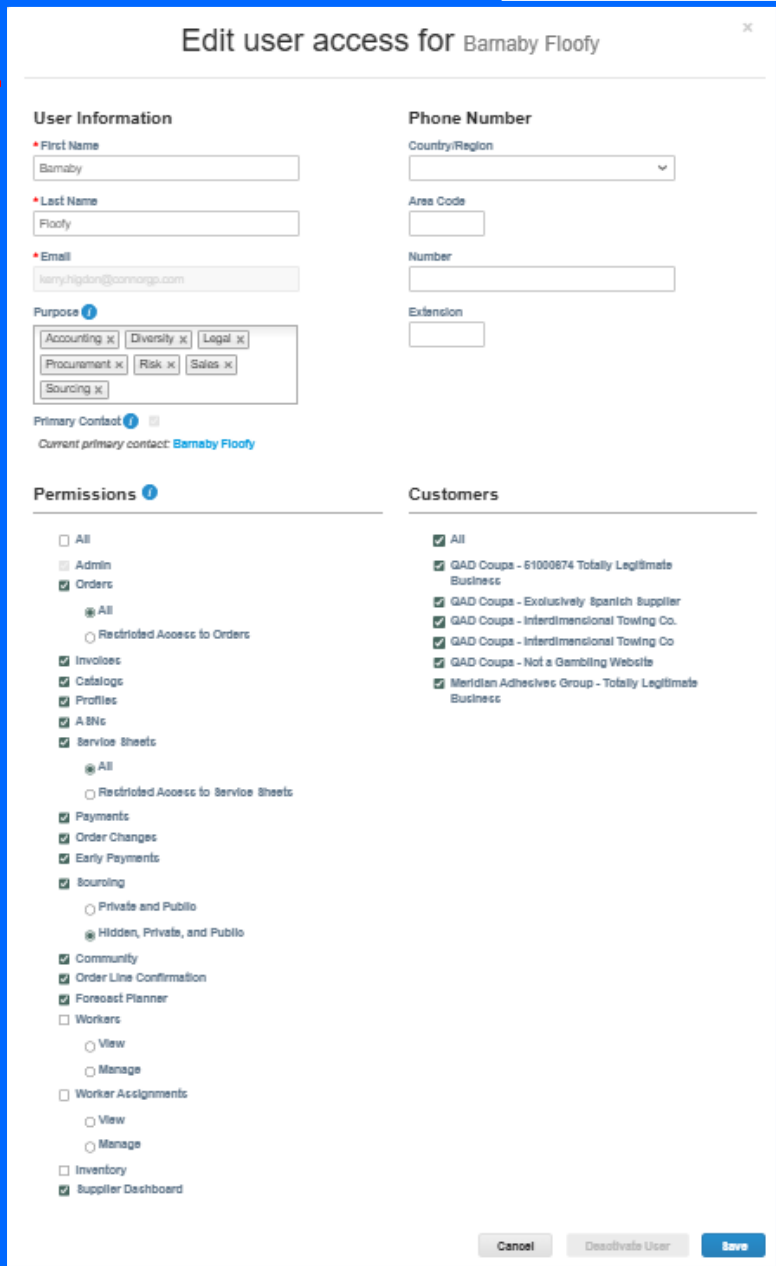


Customers that are not selected will be grayed out on the user's profile.

To invite new users to the Coupa Supplier Portal account for your organization, the **Admin** user must click the **Invite User** button. If MFA is enabled, you will be prompted for verification. The **Invite User** window will appear. Fill in the information of the user you wish to add and grant permissions and customer access.

Setup



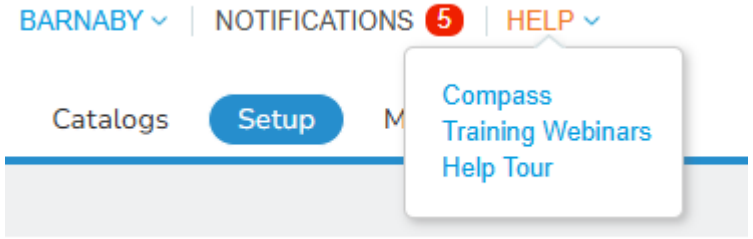


You can edit users, changing their permissions and customer connections, by clicking Edit next to their name. The **Edit User Access for [name]** will appear.

Coupa Support

At any time while completing the onboarding process you need to speak with someone you can click the Chat with Coupa Support located at the bottom right-hand side of your screen.

For any general CSP technical or functional question you can try searching in the Supplier Help Center . If you can't find the answer there, then you can contact the Couper Supplier Support Team at **supplier@coupa.com**.

For more information about Coupa, Supplier can visit the Coupa Supplier Page.

While logged into the CSP, you can also click the Help tab for Help Tour, Compass, and Training Webinars.