

Coupa Supplier Portal Tutorial

Basic operation

2024.04

Mitsubishi Heavy Industries, LTD

IMPORTANT:

This tutorial document covers only the basic functionalities of Coupa Supplier Portal. Should you have any inquiries or encounter topics not covered in the tutorial, we encourage you to reach out to the MHI affiliate company that invited you to the training.

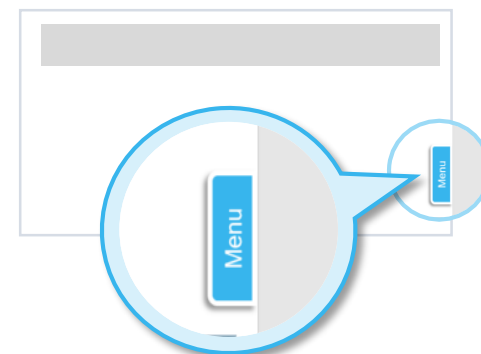
To better follow this guide, you may want to get yourself familiar with some indicators that is used.

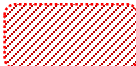






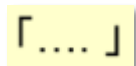


Note:

Coupa is updated regularly, so in case you encounter a discrepancy between this manual from the actual operation please let us know.

On bottom-right side of each slide, you may find a “Menu” tab, click to this tab to go to Menu page.



LEGEND	DESCRIPTION
	A cover to conceal critical information in the sample user interface.
	An additional information, that may help you understand better the instruction.
	Emphasize the area in user-interface that you may need to set your attention to.
	An index to lead you to a particular instruction, usually found if there are 2 or more instruction in same user-interface.
	An Indicator usually pointing to the whole UI image to provide an general instruction.
	An Indicators where an instruction is referred to, applied to a specific area of the user-interface.
	Indicates a user-interface transition, from the current interface to the next once an action is made.
	Found inside an instruction text-box to indicate an object (<i>Button, Tab, Checkbox, etc.</i>) in the interface. Typically, the name of object is written inside the brackets.

You can go to specific topic by clicking on each tile.

CSP Overview

Process
Overview

About this
manual

CSP General Operations

Initialize CSP

Purchase
Order

Invoice

Initial Log-in

Confirm PO

Create Invoice

Setting MFA

Acknowledge
PO

Create Credit
Note

Adding Users

Payment
Status

Remit to
Address

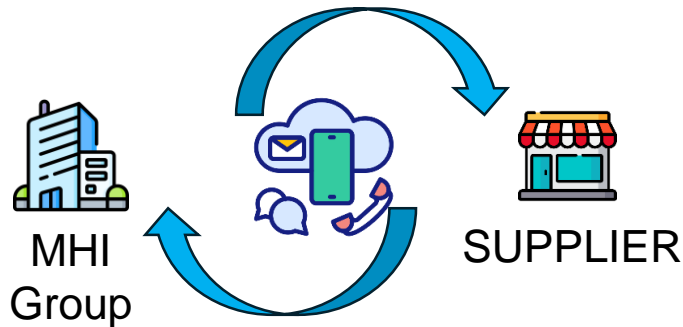
Back

Menu

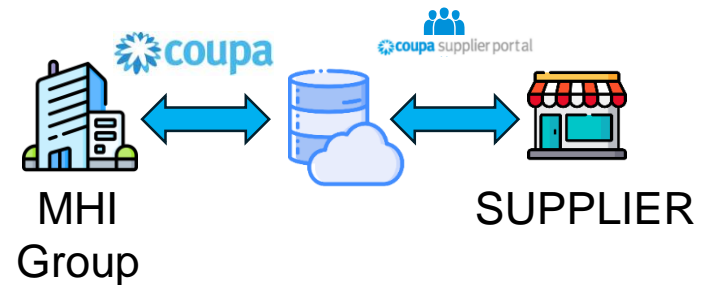
1.CSP Overview

Coupa is a cloud-based platform that simplifies business-to-business (B2B) transactions between companies and their suppliers.

Conventional B2B Transaction



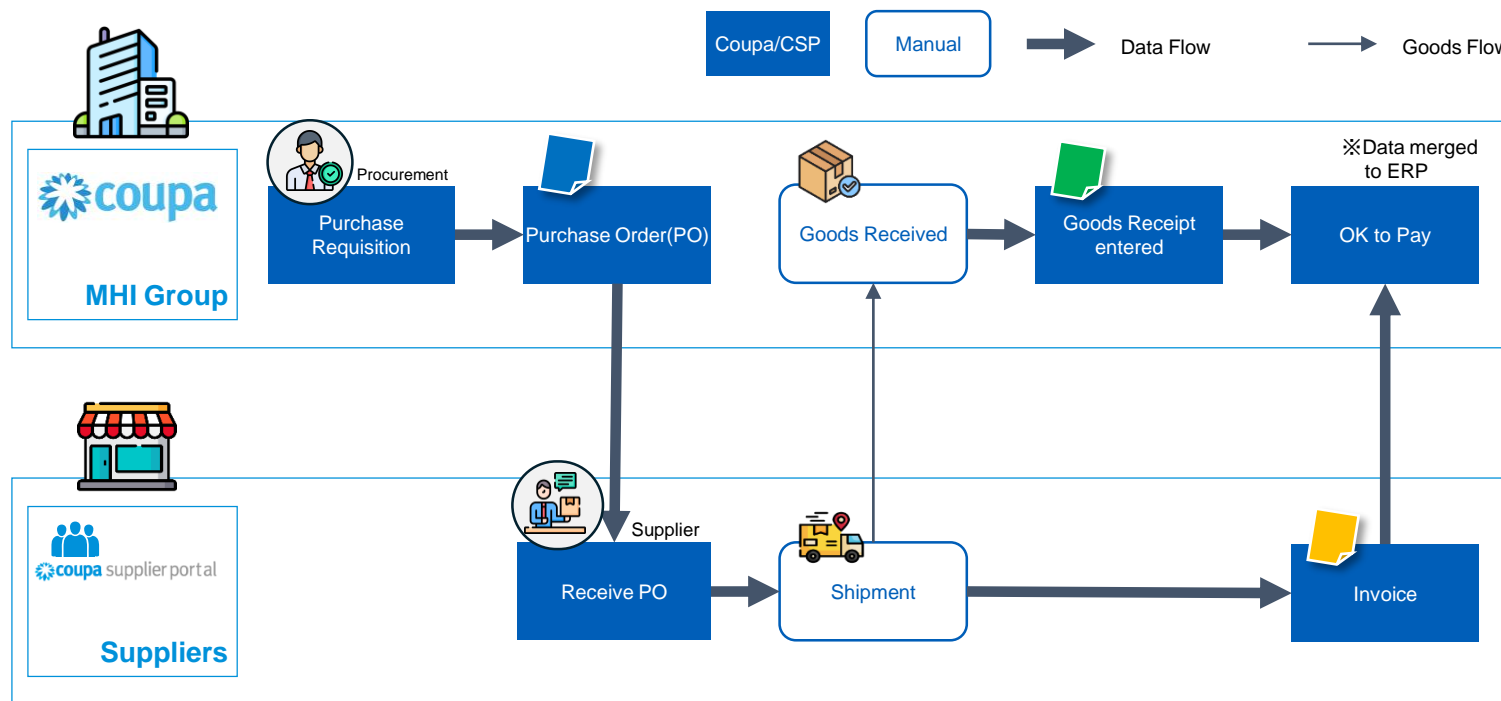
Coupa



Conventional B2B transactions are like a maze of emails, paper forms, and manual processes, leading to slow approvals, errors, and limited visibility. Coupa cuts through the maze with automation, offering a streamlined, transparent, and faster experience for both buyers and suppliers.

Receive PO, Advanced Ship Notice, and Invoice processing will be done through CSP (Coupa Supplier Portal)

※ Actual payment process, based on Coupa payment information, will not change.



Menu

Let's learn about.



- Initializing CSP
- Receive and review Purchase Orders
- Send Invoices and Credit Notes
- Manage your Company Profile
- Work collaboratively on the platform

Reminder for suppliers.

- Suppliers must provide only one e-mail address for the creation of the CSP account.
- To register, suppliers will receive an invitation e-mail.



Useful link:

<https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers>

2.CSP General Operations

	Topic:	Detail:
2-1	Initialize CSP	Initial Login
		Setting Multi Factor Authentication
		Adding Users
		Adding a Remit to Address
2-2	Receiving POs	To confirm POs in CSP
		To Acknowledge POs
2-3	Remit to Address	Creating a Remit to Address
2-4	Invoice	Create an Invoice
		Create a Credit Note
		Check Payment Status
2-5	Helpdesk	Coupa Chat Support

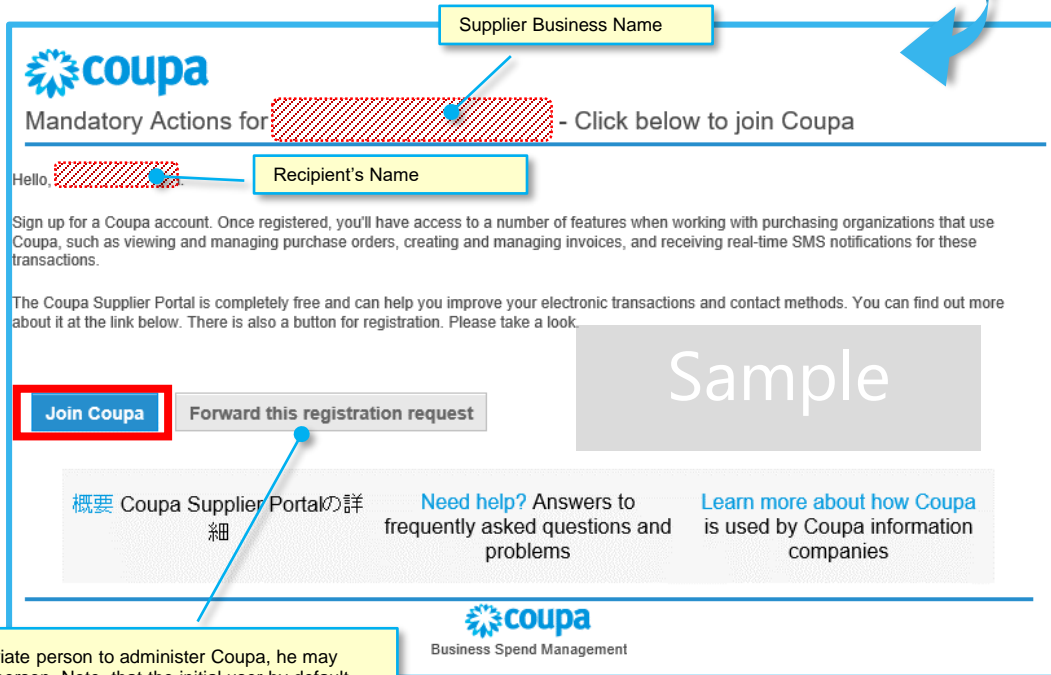
Initialize CSP

- Initial Login
- Adding Users
- Adding a Remit to Address

Invitation E-mail

An email will be sent to the supplier via CSP based on the survey collected in advance. Emails from CSP will be sent from @supplier.coupahost.com. Suppliers are required to click the 「Join Coupa」 button from the email to proceed with user registration. By default, this account serves as the admin account for your company.

The invited user will receive an invitation email.



The screenshot shows an email interface with the Coupa logo at the top left. The main heading is "Mandatory Actions for [Supplier Business Name] - Click below to join Coupa". Below this, it says "Hello, [Recipient's Name]". The body text explains the benefits of a Coupa account and provides a link to the Coupa Supplier Portal. A prominent "Join Coupa" button is highlighted with a red box. To its right is a button labeled "Forward this registration request". At the bottom, there are three links: "概要 Coupa Supplier Portalの詳細", "Need help? Answers to frequently asked questions and problems", and "Learn more about how Coupa is used by Coupa information companies". The footer includes the Coupa logo and "Business Spend Management".

If the recipient is not the appropriate person to administer Coupa, he may forward to invitation to the right person. Note, that the initial user by default will have the administrator rights over the CSP.

Registration Page

After setting the password on the initial login page, suppliers must agree to the policy and terms and conditions before submitting their information.

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for help.

* First Name

* Last Name

Name

* Email

* Password
Use at least 8 characters and include a number and a letter.

* Password Confirmation

I accept the Privacy Policy and the Terms of Use

Submit

Forward your invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).

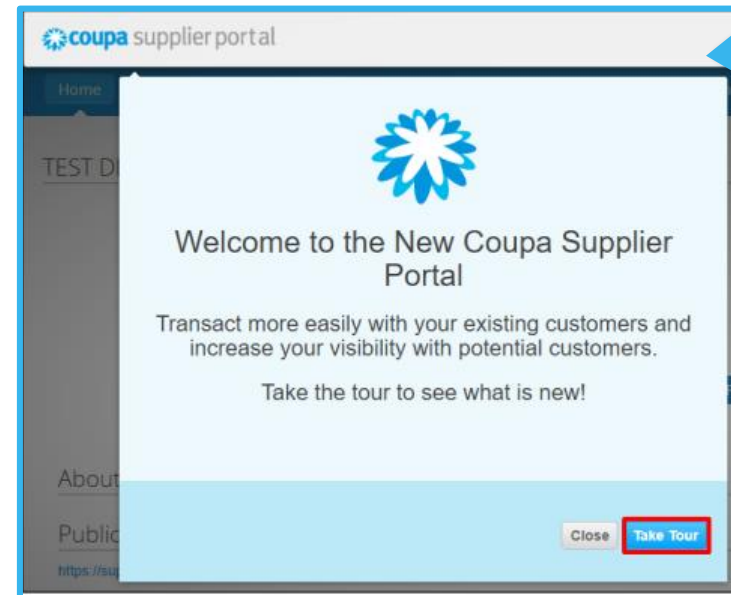
Forward email: Email @jp.kpmg.com

Submit

If the recipient is not the appropriate person to administer Coupa, he may forward the invitation to the right person. Note, that the initial user by default will have the administrator rights over the CSP.

Take Tour

Upon submission, the CSP dashboard will open. Coupa provides a tour of the new site, which can help users better understand the features offered by CSP.



For additional information while using the CSP, click **Help > Online Help**. Here, you will find helpful topics and definitions for using the supplier portal. You can also click. **Help > Help Tour** to take the tour again

NOTIFICATIONS 9 **HELP** ▾

Log-In

After the initial login, the user can use their registered email and password to log into Coupa. It is advised that the supplier bookmarks the CSP page. (<https://supplier.coupahost.com/>)



Login URL:

<https://supplier.coupahost.com/>

It is advised that the supplier bookmarks the CSP page.

The screenshot shows the Coupa supplier portal interface. On the left is the 'Register' section with fields for First Name, Last Name, Company, and Email, and a 'Register' button. On the right is the 'Log In' section with fields for Email Address and Password, a 'Log In' button, and a 'Forgot Your Password?' link. A red box highlights the Log In section. A blue arrow points from the Register button to a note below the screenshot.

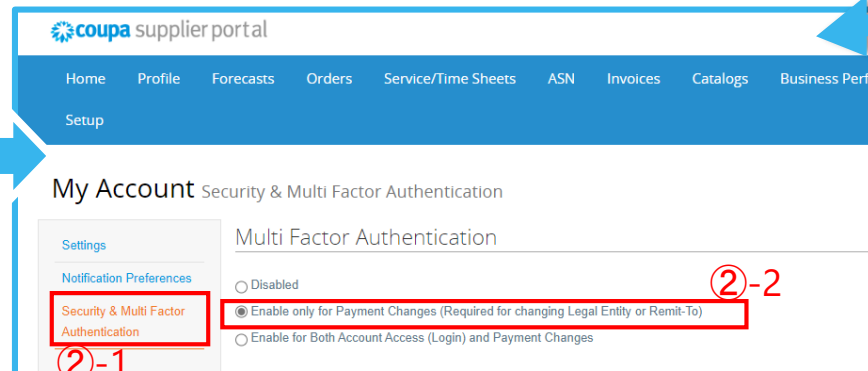
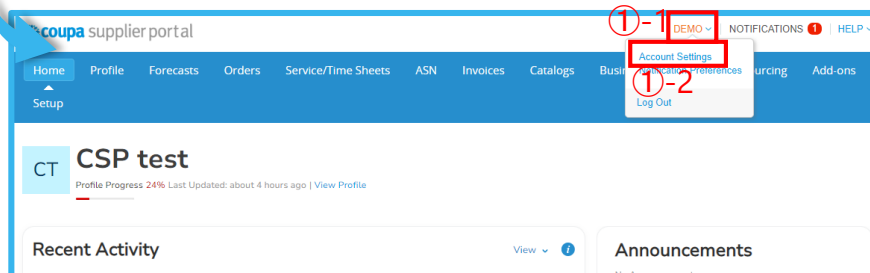
※An option to register a login is displayed in the CSP, but will not be used.

Multi Factor Authentication

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」.
Use your smartphone or mobile phone to enable two-factor authentication.

①-1 Place the cursor on the account name on the upper right of the screen and click ① -2「Account Setting」.

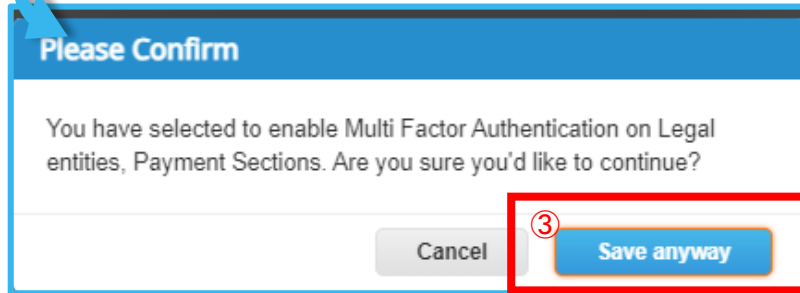
②-1 Click 「Security & Multi Factor Authentication」 → ②-1
②-2 「Enable only Payment Changes (Required for Legal Entity or Remit-To)」



※Pop-up may be displayed to encourage registration of the application for multi factor authentication. Please click on [X] or cancel and close it and proceed to ②

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」. Use your smartphone or mobile phone to enable two-factor authentication.

③ When the following screen is displayed, click 「Save anyway」.

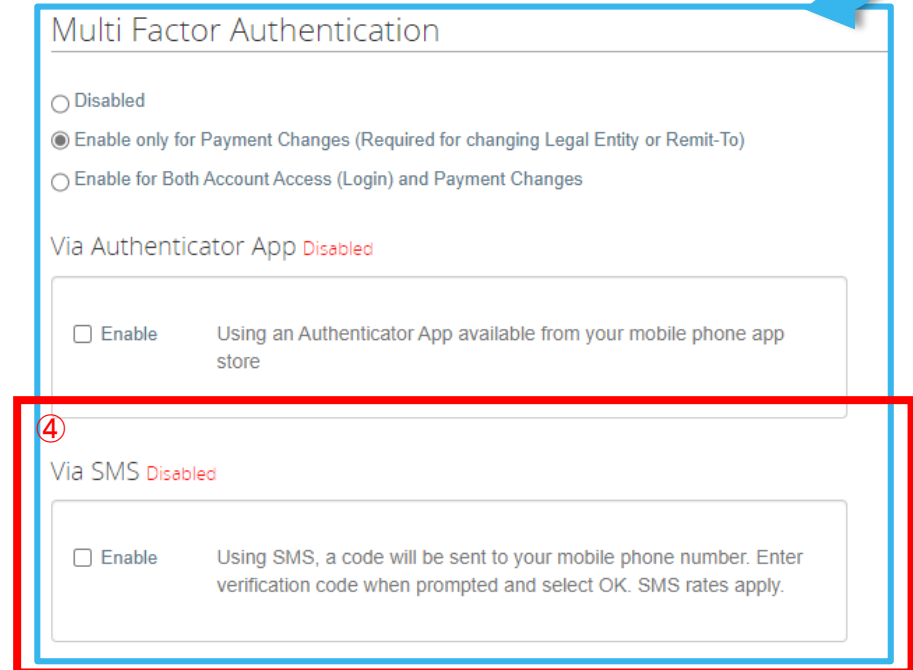


Please Confirm

You have selected to enable Multi Factor Authentication on Legal entities, Payment Sections. Are you sure you'd like to continue?

A blue arrow points from the instruction above to the 'Save anyway' button, which is highlighted with a red box and a circled '3'.

④ Select 「Via SMS」, and then click 「Enable」.



Multi Factor Authentication

Disabled

Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)

Enable for Both Account Access (Login) and Payment Changes

Via Authenticator App *Disabled*

Enable Using an Authenticator App available from your mobile phone app store

④ **Via SMS *Disabled***

Enable Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.

A blue arrow points from the instruction above to the 'Via SMS' section. A red box highlights the 'Via SMS' section, and a circled '4' is placed next to the 'Via SMS' header.

Setting Multi Factor Authentication (3/4)

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」. Use your smartphone or mobile phone to enable two-factor authentication.

⑤ Enter the phone number of the mobile phone/smartphone that can receive SMS (short-mail) in the popup window of [Verify your mobile phone], and then click 「Next」.

⑥ SMS is sent to the entered mobile phone. Enter the six-digit code that you received on the mobile phone/smartphone SMS and press 「OK」.



Verify your mobile phone

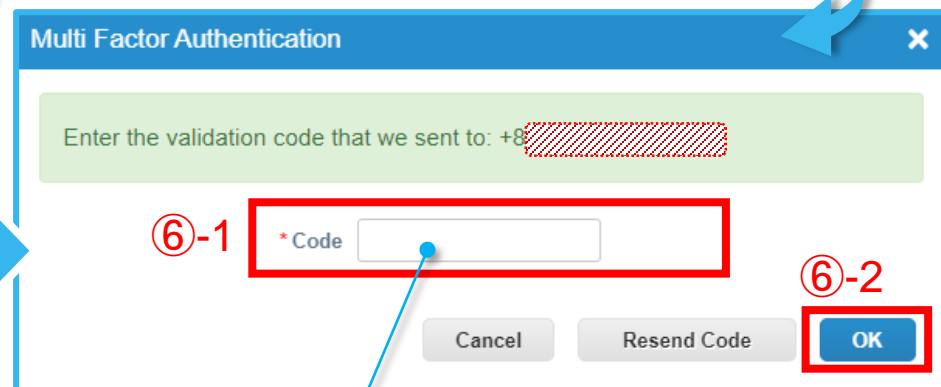
To enable Multi Factor Authentication via SMS, a code will be sent to your mobile phone number. Enter the verification code when prompted and select OK

Mobile Phone

Invalid format. Example: +81-XXXX-XXXX

Italy (Italia) +39
Japan (日本) +81
Netherlands (Nederland) +31
South Africa +27
Spain (España) +34
Sweden (Sverige) +46
Switzerland (Schweiz) +41

Cancel Next



Multi Factor Authentication

Enter the validation code that we sent to: +81-XXXX-XXXX

⑥-1 * Code

Cancel Resend Code OK

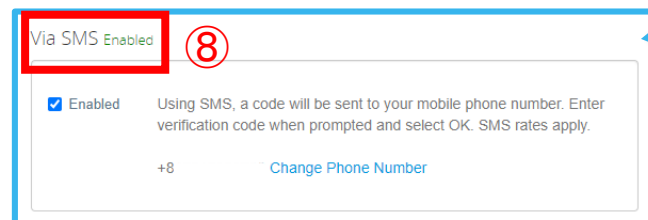
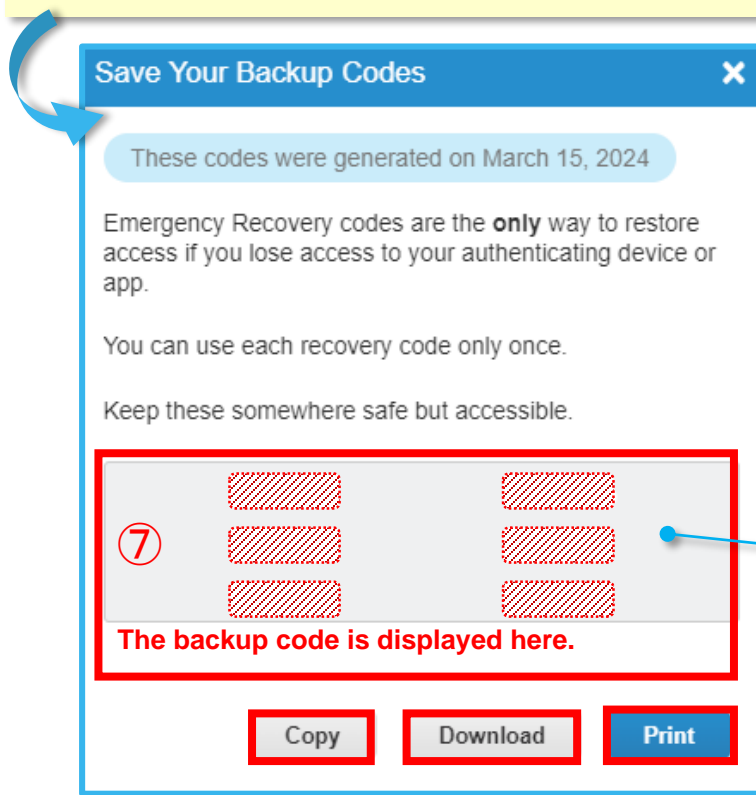
A 6-digit validation code will be sent to your registered mobile phone/smartphone via SMS (short message).

- For phone numbers in Japan, click the default 「+1」 and select 「Japan(日本) +81」
- Please omit the 「0」 at the beginning of the phone number.
Example : 080-1234-XXXX⇒ +81 80-1234-XXXX
※Hyphenation in the middle is automatically entered.

In order to enhance security, it is necessary to enable two-factor authentication when 「setting legal entity」. Use your smartphone or mobile phone to enable two-factor authentication.

⑦ The backup code is displayed. Be sure to write down the backup code as an emergency recovery code in case the authentication code is not delivered due to lost phone or changed phone number.

⑧ When the message 「Via SMS Enabled」 is displayed, the setting is completed.



Be sure to write down the backup code in the figure on the left and close the screen with ×



Note:

- You can paste in text by clicking 「Copy」
- By clicking 「Download」, you can save it as CSV.

※Do not use the Print button

Add Users

In CSP, you can add users and assign them roles, including account administration. It gives you an option to set up multiple users accessing different functionalities of the same supplier portal.

Navigate to Admin section. From the ① 「Admin」 Tab, Click on the ② 「Invite User」 button.

The screenshot shows the 'Admin Users' section of the Coupa Supplier Portal. The 'Admin' tab is selected and highlighted with a red box and a circled '1'. The 'Invite User' button is highlighted with a red box and a circled '2'. The page displays a table of users with columns for Users, Permissions, and Customer Access.

Users	Permissions	Customer Access
Yugo Kuroda yugo_kuroda@mhie.com Status: Active	ASNs Admin Business Performance Catalogs	MHI Group(Dev)

The 'Invite User' form contains the following fields and options:

- First Name:
- Last Name:
- * Email:
- Permissions:
 - All
 - Admin
 - Orders
 - Invoices
 - Catalogs
 - Profiles
 - ASNs
 - Service/Time Sheets
 - Payments
 - Order Changes
 - Pay Me Now
- Customers:
 - All
 - MHI Group(Dev) - STsupplierX
 - MHI Group(Dev) - STsupplierY
 - MHI Group(Dev) - STsupplierZ
 - MHI Group(Dev) - テレ_MIDORI ANZEN
 - MHI Group(Dev) - sample_supplierA
 - MHI Group(Dev) - ichihomare_01
 - MHI Group(Dev) - Supplier_test_training
 - MHI Group(Dev) - WWW supplier
- Buttons: Cancel, **Send Invitation**

For more information about these fields, please refer to the table below.

Field Name	Description
First Name	First Name of invitee
Last Name	Last Name of invitee
Email	Email of invitee
Permissions	Permissions to be set for each user. Admin / Orders / Invoices / Catalogs / Profiles / ASNs ※Advanced Ship Notice
Customers	Customer to provide service to

Fill and select the required information, then proceed by clicking 「Send Invitation」 button .

Added users will receive an invitation email.

Supplier Business Name

Action Required for [Redacted] - Click Below to Join Coupa

Hi [Redacted] **Recipient's Name**

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more when working with buying organizations that use Coupa.

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the button to register. Welcome!

Join Coupa Forward this invitation

If the recipient is not the appropriate person for this invitation Coupa, he may forward to invitation to the right person.

Join the Coupa Supplier Portal

Complete the information below and create the password for your account. Click here for [help](#).

* First Name [Redacted]

* Last Name [Redacted]

* Company Kuroda Shoten

* Department Operations

* Role E-Commerce Manager

* Email [Redacted]

* Password [Redacted]
Use at least 6 characters and include a number and a letter.

* Password Confirmation [Redacted]

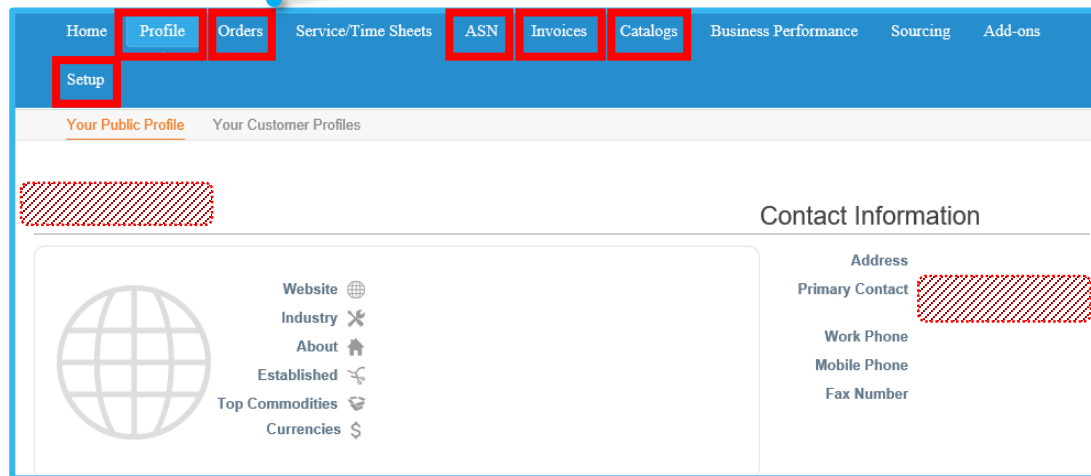
I accept the [Privacy Policy](#) and the [Terms of Use](#).

Submit

The invited user must register by filling-up, and submitting the CSP user registration form.

User Main Menu. To access a CSP function, click on the relevant tab on the main menu at the top of the CSP main page. Refer to this table for additional information about the fields.

For more information about these fields, please refer to the table below.



Tab Name	Description
Setup	Access to 「Setup」 tab. To administrate CSP users, payment addresses,
Orders	Access to 「Orders」 tab. To view purchase orders from the customer.
Invoice	Access to 「Invoices」 tab. To manage invoices to be created for the customer.
Catalogs	Access to 「Catalogs」 tab. To manage catalog items. Out of scope for MHI
Profiles	Access to 「Profile」 tab. To manage profile to be shown to the customer. Out of scope for MHI
ASNs	Access to 「ASN」 tab. To manage ASN(Advanced Ship Notice)

CSP includes remit-to addresses as part of electronic invoice compliance. You must add a remit to address before you can create an invoice

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons **Setup**

Admin Customer Setup

Admin Remit-To

[Add Remit-To](#)

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	123 Fake Street London W4 5YS United Kingdom Preferred Language: English (UK)	Address	Kuroda Shoten	✓ MHI Group(Dev)	

For more information about these fields, please refer to the table below.

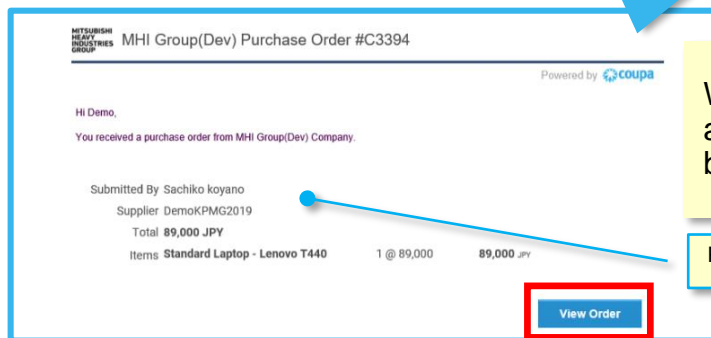
Field Name	Description
Remit to Name	Remit To Name A unique easily identifiable user-friendly name.
Remit to Code	Use this field to tie your CSP remit-to address with the corresponding address in your ERP.
Address Line 1,2	Standard Address Information
City	Name of the City
Postal Code	Standard Postal Code
Country	Country of Origin
Tax Country	Determines the origination country for tax purposes.

Purchase Order

- To confirm POs in CSP
- To acknowledge POs

Receiving PO

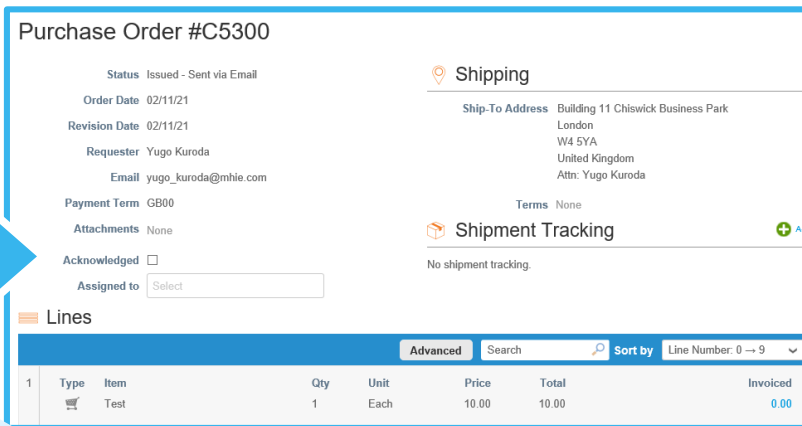
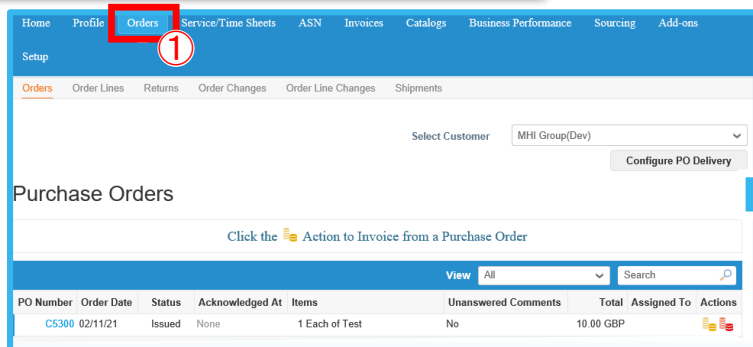
Orders from MHI group will be visible in the PO tab of CSP.



When a Purchase Order is made, you as a supplier will receive an e-mail about the PO. You may click on the 「View Order」 button, to be directed to CSP and fulfill the order.

PO details included in body of email notification

① In CSP, Select 「Orders」 tab to view list of orders.



② Click 「PO Number」 to view PO details.

Menu

Acknowledge (confirmation of receipt) the received purchase order

The receipt of the purchase order can also be checked on MHI group. Please confirm the receipt of the purchase order as much as possible. If the delivery date is not met, or if the delivery date is changed, ask the requester to update the delivery date.

① → ② Toggle ON the 「Acknowledged」 checkbox in the purchase order details

「Order Acknowledged」 will be displayed, and the information will be relayed to MHI through Coupa.

Purchase Order #MHI-C10883

General Info

Status: Cancelled - Sent via Email

Order Date: 05/19/23

Revision Date: 05/19/23

Requester:

Email:

Payment Term: ZQ01+

Affiliation Name: None

Attachments: None

Acknowledged ①

Assigned to: Select

Shipping

Ship-To Address: [Redacted]

Location Code: [Redacted]

Attn: [Redacted]

Terms: None

Shipment Tracking: No shipment tracking

Lines

Line Number	Type	Item	Qty	Unit	Price	Total	Invoiced
1		テスト	1	Each	100	100	0

Purchase Order #MHI-C11038

Order acknowledged [Close]

General Info

Status: Issued - Sent via Email

Order Date: 12/14/23

Revision Date: 12/14/23

Requester:

Email:

Payment Term: ZQ01+

Affiliation Name: None

Attachments: サプライヤ宛 コメントsample

Acknowledged ②

Assigned to: Select

Shipping

Ship-To Address: [Redacted]

Location Code: [Redacted]

Attn: [Redacted]

Terms: None

Shipment Tracking: No shipment tracking

Purchase Orders

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
03100 8211021		Issued		1 Each of Test	No	11.00 GBP		

After acknowledgment, and you review the Purchase Order list, you will notice that the 「Acknowledged At」 column, will contain the acknowledgment date.

After acknowledgment, and you review the Purchase Order list, you will notice that the 「Acknowledged At」 column, will contain the acknowledgment date.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MHI-C11038	12/14/23	Issued	03/15/24	施設管理テスト案件 1 Each of サンプル案件 (アイテム)	Yes	200 JPY		

Menu

Invoice

- Create an Invoice
- Create a Credit Note
- Check Payment Status

Create an Invoice

Invoices will be sent through the CSP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer MHI Group(Dev) Configure PO Delivery

Purchase Orders

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C5300	02/11/21	Issued	02/18/21	1 Each of Test	No	10.00	GBP	
C5081	10/22/20	Soft Closed	None	1 Each of Test Item	No	20.00	GBP	

Actions



Note:

1. Creating of invoices is processed per PO.

- ① From Purchase Orders, click the gold coin 「」 icon in the Action's column of the PO you wish you create an invoice from.
- ② Fill out any required fields marked with an asterisk (*).
- ③ Use the Calculate button to see invoice totals prior to submitting.
- ④ Click Submit. If you want to save a draft now, and continue to work on the form later, click Save as draft instead.

Create Invoice Create

General Info

② * Invoice #

* Invoice Date 02/23/21

Payment Term GB00

Date of Supply 02/23/21

* Currency GBP

Delivery Number

From

* Supplier

* Supplier VAT ID GB999999999

* Invoice From Address

* Remit-To Address

Taxes

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

Total VAT	2.00
Net Total	10.00
Gross Total	12.00

③ ④

To refund a credit note using CSP

① From Invoices, click the red coin icon in the Action's column of the PO you wish you create the credit note from.



- ① The Credit Note is created based on the original invoice
- ② You must input the Credit Note N^o provided by your system.
- ③ Select the type of adjustment to be done and adjust the Credit Note accordingly.
- ④ Click on Calculate to Adjust the Credit Note. Then it can saved as a draft, deleted or submitted..



Note:

1. The Credit Note amount must be a negative value.
2. To Cancel an invoice, the same procedure is applied

Payment status can be confirmed for each purchase order.
From the ①「Invoices」, Select ②「View」 down box, then click on ③「Payment Information」.

① Invoices

② View

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	12/03/19	Draft	C3586	3,300 JPY	No	
1130_1731	11/25/19	Pending Approval	None	300	No	

③ Payment Information

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	C3586	None	Draft	12/03/19	Net 14 Days	12/03/19	
No	None	1130_1731	Pending Approval	11/25/19	None	11/25/19	
No	None	ichihomare 1121_01	Pending Approval	11/21/19	ZQ01	11/21/19	

- ③
- All
 - Abandoned
 - Approved
 - Credit Notes
 - Disputed
 - Disputes with a supplier response
 - Disputes without supplier response
 - Draft
 - Payment Information**
 - Pending Approval
 - Processing
 - Voided
 - Create View


「Yes/No」 will be displayed for 「Paid」 column.

Helpdesk

- Coupa Chat Support
- Service Now

Helpdesk

If you encounter any problem you may contact us, or can also request assistance directly to the Coupa Support team through the chat function

View	All	Search	
Unanswered Comments	Total	Assigned To	Actions
st	No	10.00 GBP	
st Item	No	20.00 GBP	
st Service	No	750.00 GBP	
st	No	500.00 GBP	

[Chat with Coupa Support](#)

Chat with Coupa Support

*First Name

*Last Name

*Email

Phone

[Start Chat](#)

Service Now

We are currently building a support system through Service Now platform to assist you further...

Thank you!

MOVE THE WORLD FORWARD

mitsubishi
heavy
industries
group