



COUPA USER MANUAL

COUPA SUPPLIERS PORTAL (CSP)

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WHAT IS COUPA?



Coupa Software is a holistic spend management solution that allows you to manage the entire purchasing process automatically, centrally and in connection with the organization's systems. Some key figures for the solution:

5,000+

Clients

10M+

Suppliers

125+

Countries

Multi

Currency

Multi

Language

Rated #1 by top analysts

Gartner

Spend Matters

PayStream
ADVISORS

FORRESTER

IDC

SUPPLIER PORTAL (Coupa Supplier Portal)

Coupa Supplier Portal – CSP

Coupa 's Supplier Portal is where suppliers can manage their purchase orders, create and monitor their invoices and credit notes, among other things. It is a free tool for suppliers to easily interact and collaborate with KAO. Interacting on the Portal is free of charge and is an opportunity for other companies, Coupa customers , to find them.

These are the actions that will be enabled in the supplier portal:



REGISTRATION ON THE COUPA SUPPLIER PORTAL (CSP)

1. You will receive an email from Coupa Supplier Portal, indicating that KAO has invited you to register for Coupa Supplier Portal:

Kao Action required - Kao Chemicals Europe SLU and its affiliate Kao Corporation SAU Registration instructions

Provided by 

Hello, Demo Provider - CSP:

We manage all business expenses electronically to ensure you get paid on time and avoid lost documents.

In order to ensure your business success, you have 48 hours to register your account. Please contact us at supplier@coupa.com if you are unable to register for any reason!

Juanita Gonzalez
Kao Chemicals Europe SLU and its affiliate Kao Corporation SAU

Join the Coupa Supplier Portal

Resend invitation



Business Expense Management

2. Using the **Join Coupa button Supplier Portal** You will be directed to the Coupa Supplier Portal to begin your registration.

3. Using the **Resend Invitation button** you can redirect this invitation to someone else in your organization by entering their email.

4. Once you click on the **“Join Coupa” option Supplier Portal** you will need to complete your registration on the portal. To do so, you will need to set up a password and accept Coupa 's privacy policies and terms of use.

Create an account

Kao Chemicals Europe SLU and its affiliate Kao Corporation SAU are using Coupa to conduct electronic transactions and communicate with you. We will guide you through a quick and easy setup for your account with Kao Chemicals Europe SLU and its affiliate Kao Corporation SAU so you are ready to do business together.

* Company name
Demo Provider - CSP
Legal name of your company (or personal legal name if you are an individual)

* Email
jgonzalez+supplierkao@parameta.co

* Name
Jenny

* Last name
Vargas

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

* Confirm Password

* Country/Region
▼

* Tax registration i
#####

☐ I don't have a tax ID

☐ I accept the Privacy Policy and Terms of Service agreements

Create an account

After this click on **Create an account** .

5. Enter the code sent to your email:



Your Coupa Verification Code

Below is the secure verification code you requested. Enter the 6-digit code in Coupa to verify it's you.

384821

If you didn't request this code please contact us at supplier@coupa.com.

Email verification

We have sent a unique verification code to
jgonzalez+supplierkao@parameta.co.


3	8	4	8	2	1
---	---	---	---	---	---

Didn't receive the verification code?

[Request a new code](#)

Following

6. As a next step, you can manage the following form with contact information and other company data, if you want to update [your company's public profile](#). Then select **Next**.



Your contact information

* Company website


☐ I don't have a website

* Country/region of primary address

Following

Note: This information is to complement your company profile on Coupa. It is not information that KAO is requesting from you. Therefore, **it is “NOT MANDATORY TO COMPLETE”**.

Please note that you can complete this and the following sections or you can skip these steps and fill in the details later. To do so, you can click the “**Skip for now**” button or close the window by clicking the “**X**”:



Make sure you get paid

Confirm location addresses

Primary

* Country/Region

Spain

* Address line 1

* City

State

* Postal code

* Country/Region

* Tax registration ID

☒ I don't have a tax ID

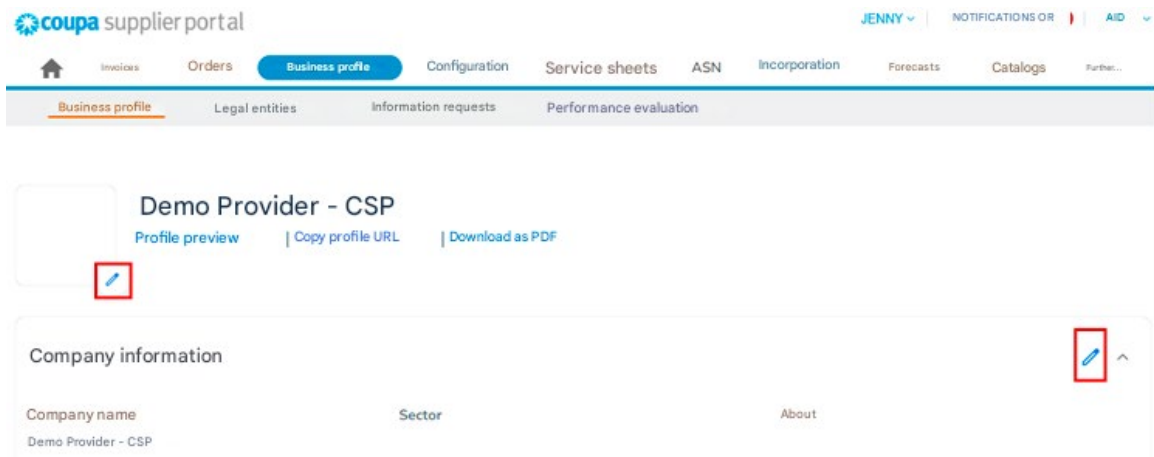
* Reason

Following

Skip for now

Please review the [Public Profile section in Coupa](#) for more details about the purpose and use of the information you are being asked for on these screens.

- Go to the Business Profile tab to complete or update the information from the “**Edit Profile**” button:

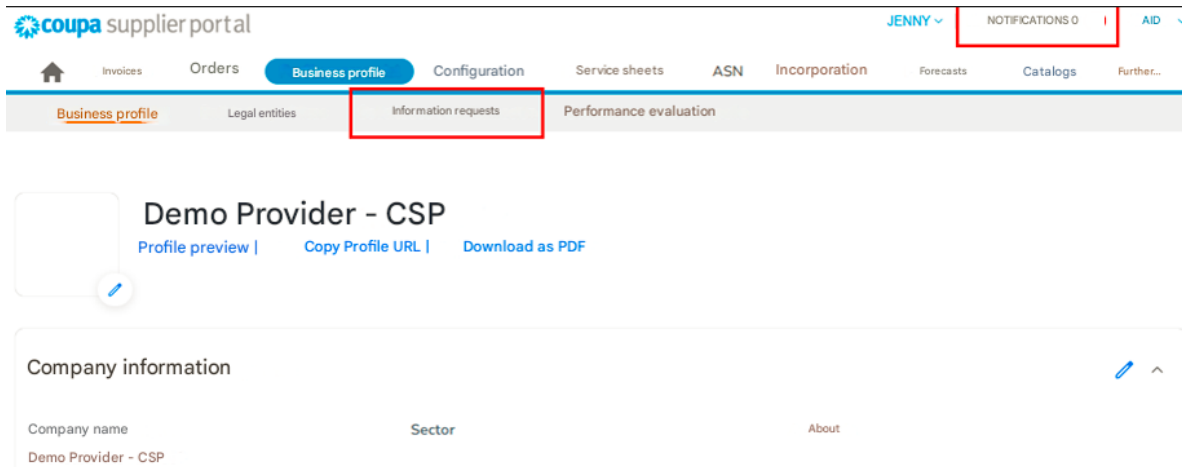


Public Profile on Coupa

Coupa's supplier network, when you register on the portal, the platform asks you for a series of data to build your company profile. This information is for public use by Coupa's clients and through this information, Coupa can suggest your company as a potential supplier based on what customers are looking for. For example, based on the goods or services you offer and/or the areas in which you operate. It is your decision if you want to complete some of this data, understanding that it is for Coupa's use and not a request or requirement of KAO.

KAO Information Request

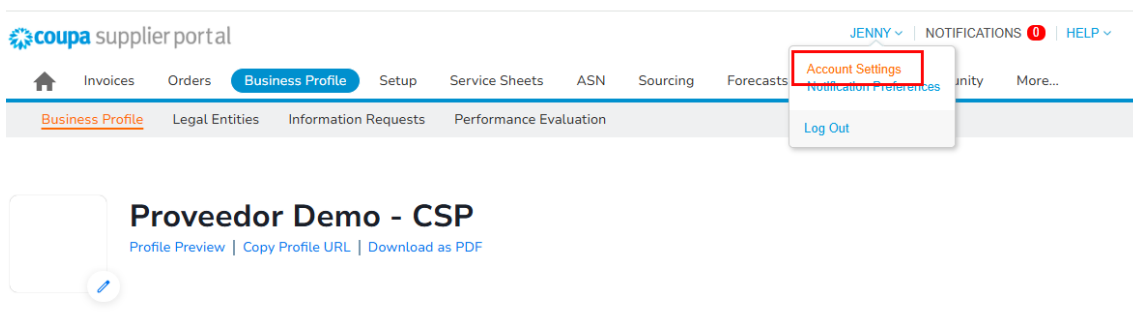
When KAO asks you to complete information through a form, you will receive due notification and will be able to complete this form from the Portal.



MULTIFACTOR AUTHENTICATION

To further protect your information, Coupa allows you to enable a second security check known as Two Factor Authentication (2FA). This security method is very common in banking applications and other types of applications, including email, and consists of using a password and additionally a code or token. To do this, you will need an application which you will configure to connect it to your account on the Portal and generate this code for you. There is a long list of applications available for this purpose. When the Portal asks you to verify your authenticity to grant you access, you will have to enter the code that is currently valid in your application.

The process below can only be performed by users with **administrator permission** from the supplier/primary contact:



1. Place the cursor (mouse) pointer over your name, in the upper right corner, and click on **“Account Settings”**

My Account Security & Multi Factor Authentication

[Settings](#)
[Notification Preferences](#)

[Security & Multi Factor Authentication](#)

[App Connections](#)

Multi Factor Authentication

☐ Disabled
☒ For Payment Changes (Required for changing Legal Entity or Remit-To)
☐ For Both Account Access (Login) and Payment Changes

Via Authenticator App

Use an Authenticator App available from your mobile phone app store.

☐ Default

Via Text Message

Use a code sent via text message to your phone number.

☐ Default

Recent Login Activity

01/24/25 (09:01 AM) - Chrome - Windows - 190.67.216.241

01/23/25 (01:41 PM) - Chrome - Windows - 190.67.216.241


2. In the menu on the left, click **“Security and multi-factor authentication”**

Multi Factor Authentication via App ✕

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. [Learn more](#)
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal



CA4IVCLMRDINRXYTCPX73
ZHLD26LV3PJ

Click to copy Security Key

2 Enter the 6-digit verification code from your device.

Code

Cancel
Enable

3. Download the authenticator app of your choice.

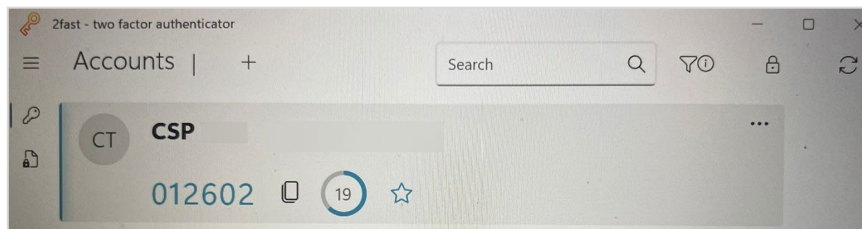
a. On your **mobile device**

- i. You can download an authenticator app, such as Google Authenticator or Microsoft Authenticator , from the AppStore or Google Play on your computer.
- ii. Enter the application, register (if necessary) and authorize the use of your camera
- iii. Using your mobile device and from the app, point to the screen with the QR code. This will complete the registration of your access to the CSP in said authentication application.
- iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).

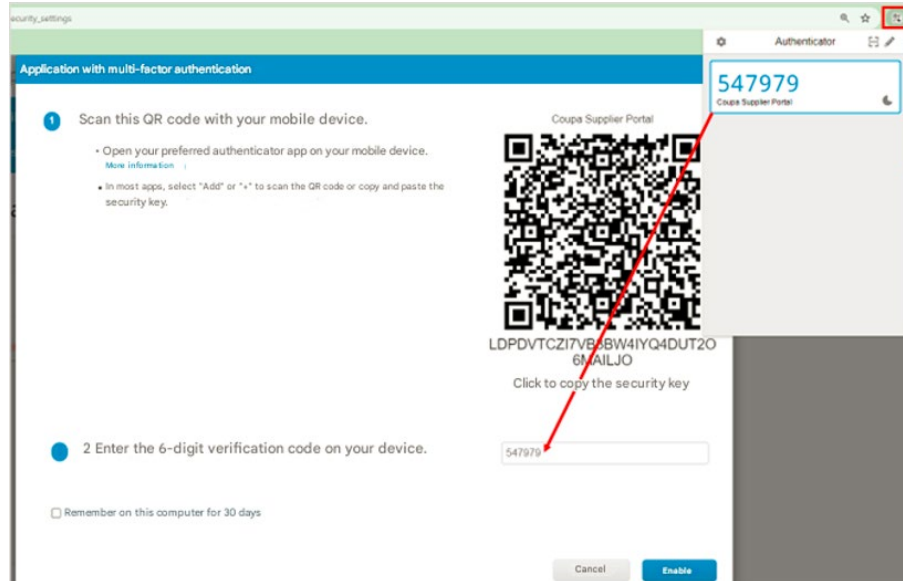
b. On your **computer** (desktop application)

- i. You can download a desktop authenticator app, such as [2Fast](#)
- ii. Please log into the app and register if necessary.

- iii. Enter the code you see on the screen (from the CSP), which you will find just below the QR code. This will complete the registration of your access to the CSP in said authentication application.
- iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).



- c. From your **internet browser** (Chrome, Edge, Safari, etc.)
 - i. Download/add an authentication extension for your internet browser:
 - 1. Google Chrome – [Google Authenticator](#) or [Authenticator](#)
 - 2. Mozilla Firefox - [Authenticator](#)
 - 3. Microsoft Edge – [2FA](#)
 - ii. Enter the extension and register if necessary.
 - iii. Scan the QR code from the extension or copy/paste the code you see on screen (from the CSP), which you will find just below the QR code. This will complete the registration of your access to the CSP in said authenticator application.
 - iv. Enter the 6-digit code, which you will find in the application you just downloaded, on your internet browser screen (Step 2 on the screen).



4. By clicking “**Enable**”, Coupa will generate backup codes to restore access in case you lose your mobile as an access device. It is recommended to download them and leave them in an easily accessible, but safe place.

Save your backup codes

These codes were generated on July 10, 2024.

Emergency recovery codes are the only way to get in if you lose access to your device or authenticator app.

You can only use each recovery code once.

Store these somewhere safe but accessible.

4A00ZQ	IcLhFg
FXc-aA	VcfS8w
Ao7IHg	eZFELA

Copy
Discharge
Print

- multi-factor authentication , the configuration screen will open where you can choose for which cases to activate authentication (Payment or Login Changes), whether you want to change the authentication app, whether you want to enable SMS authentication (with additional SMS fees), or whether you want to display or regenerate recovery codes.

My Account Security and Multi-Factor Authentication

Configuration

Notification preferences

Security and multi-factor authentication

Multi-factor authentication

☒ For payment changes (required to change legal entity or sender)
☐ Both for account access (Login) and for payment changes

Using the authenticator app

☒ Use an authenticator app available in your cell phone's app store.

☒ Default

By text message

Use a code sent by text message to your phone number.

☐ Default

INVITATION TO USERS

You can invite other users in your company to also be part of the portal, either by resending the initial invitation with the “Resend this invitation” option (refer to the [CSP Registration section](#)) or from the configuration menu.

- Select **Settings** at the top of the page.
- Click the **Invite User** button on the left.

[Home](#)
[Invoices](#)
[Orders](#)
[Business Profile](#)
[Setup](#)
[Service Sheets](#)
[ASN](#)
[Sourcing](#)
[Forecasts](#)
[Catalogs](#)
[Add-ons](#)
[More...](#)

[Admin](#)
[Customer Setup](#)
[Connection Requests](#)

Admin Users

[Users](#)
[Merge Requests](#)
[Merge Suggestions](#)
[Requests to Join](#)

Invite User

View: All Search

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
Contacto Proveedor	supplierteste+schindlerkao@gmail.com	Active	ASNs Admin Business Performance	Kao Chemicals Europe SLU y su afiliada Kao Corporation S.A.	Accounting, Diversity, Legal, Recruitment	Edit

After completing the contact information of the person, you are going to invite to the portal, you can assign the permissions that the user will have to view the different tabs and the corresponding data and send the invitation. From this menu, administrators can assign visibility and access to the information and the client(s) to which the user will have access.

×

Invitar a usuario

Información del usuario

Nombre

Apellidos

* Correo electrónico

Propósito
Select Some Options

Número de teléfono

País/Región

Área/Ciudad

Local

Extensión

Permisos

- ☒ Todo
- ☒ Administrador
- ☒ Órdenes
- ☒ Todo
- ☐ Acceso restringido a pedidos
- ☒ Facturas
- ☒ Catálogos
- ☒ Perfiles
- ☒ Asn
- ☒ Hojas de servicio
- ☒ Todo
- ☐ Acceso restringido a las hojas de servicio
- ☒ Pagos
- ☒ Cambios de órdenes
- ☒ Pagos anticipados
- ☒ Rendimiento empresarial
- ☒ Abastecimiento

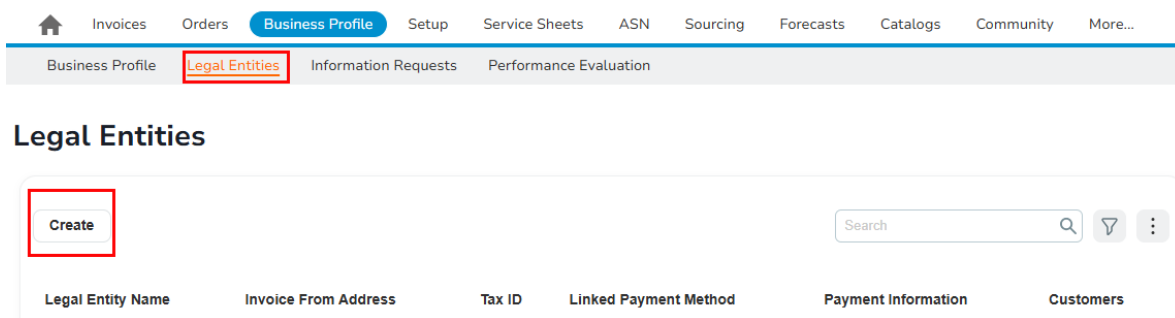
Clientes

- ☒ Todo
- ☒ Kao Chemicals Europe SLU y su afiliada Kao Corporation SAU

Upon receiving the invitation, the user must accept the T&C to **Join Coup**. As well as verify their email using the automatically generated code. Once these steps are completed, they will not be asked to enter data related to the company profile. However, if the user has access to the Profile, they can update it at any time.

ADD LEGAL ENTITY

In order to **create invoices** in the CSP, you need to add your “legal entity”. Legal entity is a generic term used by Coupa and is basically used to register the address from which you will be invoicing. This is independent of whether it is a company or a natural person. As you will see below, the portal will ask for the address data as the client(s) applied. This way, the address can be automatically assigned to the invoices that you are going to register in the future. This configuration can only be done by the **administrator user** of the main supplier/contact:



1. Select **Business Profile** at the top of the page.
2. Select **Legal Entities** in the bar
3. Click the **create** button on the left.

You must complete the requested information:

Create Legal Entity

×

* Legal Entity Name

* Country/Region

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region

* Address Line 1

Address Line 2

+

* City

* State

* Postal Code

Invoice From Code ⓘ

Ship From Address

Please enter the physical address that your goods are shipped from? This can be a warehouse address.

When selecting the country from which you operate and from which you will be billing, the portal may ask you to complete additional data on this screen.

Create Legal Entity

×

* Legal Entity Name

* Country/Region

Spain

Tax Registrations

* Country/Region

VAT ID

+

Add Tax Registration

Additional Company Information

Mercantile Register ⓘ

You must complete the data for the invoice's origin address. Note that by default the boxes are selected so that this same address is used as **the Remittance Address** and the address from which the invoice is **Sent** . If they are different addresses, you must uncheck the box and in the next screens you can indicate the corresponding address. Remember that VAT ID is a generic term used by Coupa , as is Tax Registration. Both refer to the unique identifier assigned to your company, when it is

registered in the country, for fiscal and tax purposes. In each country this identifier has a different name, in the case of Mexico it would be the RFC.

Click **“Save”**

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

Country/Region

Spain

Address Line 1

Address Line 2

City

State

Postal Code

Invoice From Code ⓘ

Preferred Language

Spanish (Spain)

Cancel

Save

Then click “continue”:

Your Legal entity setup is now complete. If you would like to add new Payment Methods to this Legal Entity which your customers can use to pay you, please click continue below.

Close

Continue

Add return address

1. Select **Settings** at the top of the page.
2. Select **Admin** from the bar and **Payment Methods**
3. Click the **Add Return Address** button

Admin Remit-To

[Users](#)
[Merge Requests](#)
[Merge Suggestions](#)
[Requests to Join](#)
[Fiscal Representatives](#)
[Payment Methods](#)
[sFTP Accounts](#)
[cXML Errors](#)
[sFTP File Errors \(to Customers\)](#)

Add Payment Method

Payment Method Name	Remit-To Address	Payment Type	Legal Entity
No results found			

Select the **ADDRESS** option.

Add a new remittance account

* Payment type

Bank account

Address

Bank account virtual card

What are the

bank account?

Account Country/Region

Colombia

Fill in the information shown, then click the **Save and Continue** button.

Add a new remittance account

* Payment type

Address

What is your Shipping Address?

*Address line 1

*City

State

Select an option

* Postal code

*Country/Region

Colombia

Recommended

If you receive payments to a location other than where your business is registered, add the address here.

What is your remittance address integration code? (optional)

Which customers can use this account?

Everything

Transnetwork

Cancel

Save and continue

Click “Next”:

Add a new remittance account

Remittance Address locations let your customers know where to send their payment. Click Add Remittance Address to add more locations, otherwise click Next.

Add Return Address

Remittance account	Shipping Address	State	
Address	Plaza Grecia, Local 12 El Ingenio 20301	Aspet	Manage
	Costa Rica		

Deactivate legal entity

Cancel

Following

Click “Done” or “Ready”

×

Add a new remittance account

For many countries/regions, it is mandatory to include different shipping details on the invoice if they are different from the country where your legal entity is registered.

Add Send from

Qualification

Las Americas Avenue 1750

Medellin

Antioch

01009

Colombia

State

Asset

Manage

Deactivate legal entity


Ready

Once all the requested information has been completed, Coupa will show that the Legal Entity was successfully added:

×

Complete setup

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most clients require you to send them this payment information in addition to providing it on the invoice. ⓘ

- Click the Profile Tab to see if your client has a form that collects payment information.
- Otherwise, you will need to send it through another channel.

Go to Orders

Go to Invoices

Return to Admin.

Ready

It is necessary to have at least one Legal Entity registered in the portal, to register and send invoices. However, if you have several entities/companies and invoice from different addresses, you can register several entities. Then for each invoice, you must indicate which entity/address applies.

Note: The addresses used in this manual are fictitious examples.

HOME PAGE

On the portal's home page, you will find an overview of your activity with KAO. For example, you will be able to see the latest Purchase Orders received, as well as the latest status changes to your invoices. Here you will also be able to see any important announcements shared by KAO. For example, information about an upcoming cut-off in invoice receipts.

The screenshot shows the Coupa Supplier Portal home page. At the top, there's a header with the Coupa logo and 'supplier portal'. On the right, it says 'JENNY' with a dropdown arrow, 'NOTIFICATIONS' with a red circle containing '1', and 'HELP' with a dropdown arrow. Below the header is a navigation bar with links: Invoices, Orders, Business Profile, Setup, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Community, and More... The main content area has a blue box on the left with 'PD' and 'Proveedor Demo - CSP', with a subtext 'Profile Last Updated: about 21 hours ago | View Profile'. To the right of this box are two sections: 'Recent Activity' and 'Announcements'. The 'Recent Activity' section shows a list item 'Kao Chemicals Europe SLU y su a...' and a message 'No activity found for Kao Chemicals Europe SLU y su afiliada Kao Corporation SAU.'. The 'Announcements' section says 'No Announcements'. Below these are four boxes: 'Two Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection).

CONNECTION REQUESTS

In case your COUPA (CSP) access is not linked to KAO, you can request connection through the “Settings” -> **Connection Requests** menu and then click **search**:

The screenshot shows the Coupa Supplier Portal 'Connection Requests' page. The header is the same as the home page. The navigation bar has 'Setup' highlighted. Below the navigation bar, there's a sub-navigation bar with 'Admin', 'Customer Setup', and 'Connection Requests' (which is highlighted with a red box). On the left side, there's a 'Learning Center' section with links 'Adding users to your account' and 'FAQ'. The main content area is titled 'Request a Customer Connection' with an information icon. Below the title, it says 'Your customers below use Coupa! Send them a connection request.' There's a table with columns: Customers, Actions, Status, Email, Date, and Comments. The table has two rows: 'GeoStabilization International (GSI)' and 'Glencore Canada Corporation', both with a green double arrow icon in the Actions column. Below the table, there's a text input field with the placeholder 'Don't see the customer you're looking for?' and a red 'Search' button.

Search for KAO, select the company and then click **Apply**:

Search for a customer

i

* Customer Name

KAQ

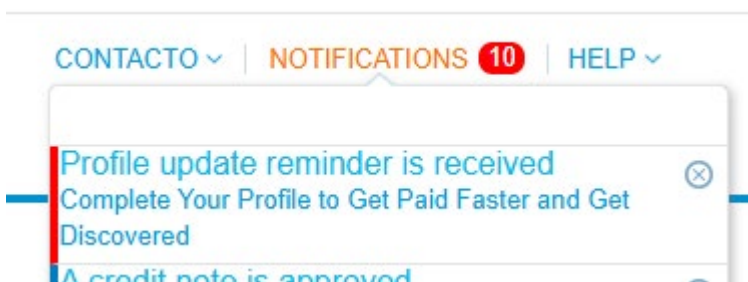
You are limited to 23 attempts. Can't find your customer? [Contact Support](#)

Cancel

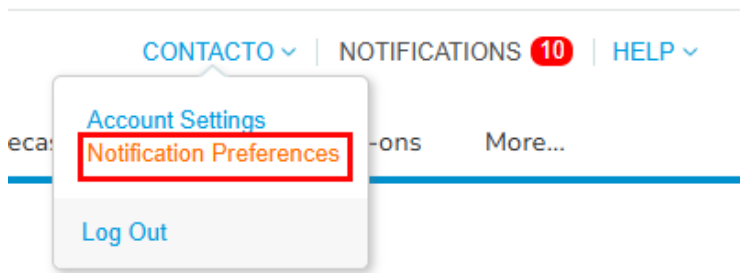
Request

NOTIFICATIONS

You will be able to receive notifications in your email as well as directly in the portal. Once inside the portal, hover over the [Notifications link](#) to see the latest notifications received. Only the three most recent notifications will be displayed, to see all notifications in detail and manage them, click on the **Notifications** or **View all notifications links** :



To configure your notifications, select **Notification Preferences**.



My Account Notification Preferences page , all notifications that can be disabled or enabled as Platform notifications (online) and/or by email will appear.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email: Mobile(SMS):

Verify number to receive SMS

Account Access

Merge Request	<input type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Request to Join	<input type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

Announcements

New Customer Announcement	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	---------------------------------	--------------------------------	------------------------------

Business Performance

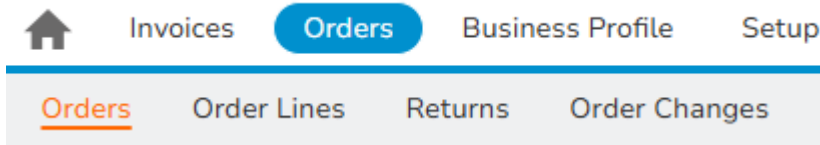
Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
-----------------------------------	--	--------------------------------	------------------------------

When you are finished, select the **Save button** at the bottom of the page.

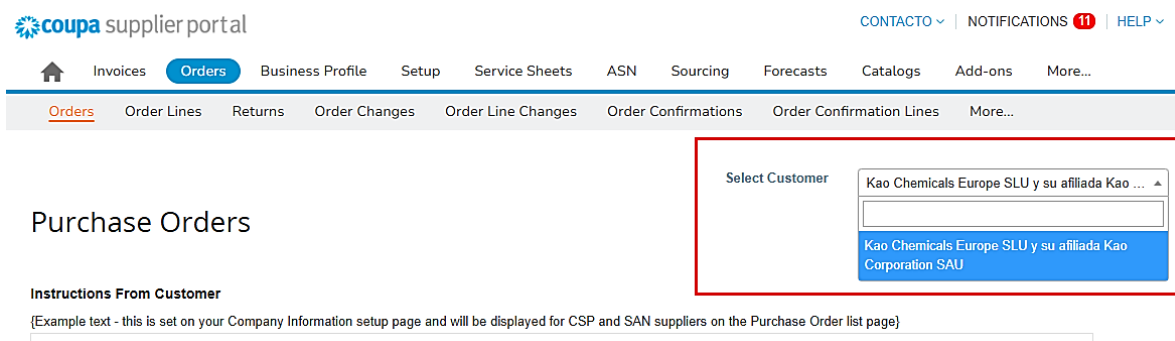


PURCHASE ORDER MANAGEMENT

In the main menu, click on the **Orders tab** . The Orders page will appear with the **Purchase Orders table** . In this section, you will have complete visibility over the purchase orders that your customer has issued to you.



On this screen you will find a summary of the Orders you have received from KAO. In case you are connected to several clients, from the portal you will be able to select the client whose orders you want to review.



In this summary you will be able to see the status of the order, the goods/services ordered and the total of the order. To see the details of the order, you must click on the order number (link in blue). While in the Purchase Order, select the “ **Confirmed** ” box to let your client know that you have seen the Purchase Order and are working on it.

Purchase Order #C141

General Info

Status Issued - Sent via Email

Order Date 12/03/24

Revision Date 12/03/24

Requester Veronica Estevez

Email vestevez@kao.es.test

Payment Term ZZE0-56 DIAS, día 10 Y 25

Attachments None

Acknowledged ☐

Assigned to

Shipping

Ship-To Address Av Puig dels Tudons, 10 P.I. Santa
Laboratorio
08210 BARBERÀ DEL VALLÈS España
Spain
Location Code: E580
Attn: VERÓNICA ESTÉVEZ

Terms CPT

Shipment Tracking

[+ Add](#)

No shipment tracking.

Lines

Advanced <input type="text" value="Search"/> Sort by Line Number: 0 → 9							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Cable HDMI	50	UNT	3.25	162.50	0.00
<div> Need By 01/01/25 Supplier Part Number None Supplier Auxiliary Part Number None Manufacturer Name None Manufacturer Part Number None </div>							
2	Type	Item	Qty	Unit	Price	Total	Invoiced
		Modem WiFi	50	UNT	128.00	6,400.00	0.00

Within each purchase order you will find different options:

Lines

Advanced <input type="text" value="Search"/> Sort by Line Number: 0 → 9							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Cable HDMI	50	UNT	17.90	895.00	0.00
<div> Need By 12/17/24 Supplier Part Number None Supplier Auxiliary Part Number None Manufacturer Name None Manufacturer Part Number None </div>							

Per page 15 | 45 | 90

Total EUR 895.00

Create Invoice

Save

Print View

Comments

[Mute Comments](#)

Enter Comment

Complete lines

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment


Print Preview will show you the purchase order in the format in which the order arrives in your email.

Print

Email

Delete frame

Close



Purchase Order #C177-2

<p>Billing address</p> <p>KCSA-Expenses (ESA58408261)</p> <p>Puig dels Tudons, 10 Pg.Ind. Santiga Barberà del Vallès, Barcelona 08210</p> <p>Sincerely:</p>	<p>Mailing address</p> <p>KCSA-Expenses (ESA58408261)</p> <p>Av Puig dels Tudons, 10 P.I. Santiga Toner (RM) BARBERÀ DEL VALLÈS, Spain 08210 E500</p> <p>Sincerely, NOELIA GALLARDO</p>	<p>Supplier details</p> <p>MOLLETENSE LAMINATED STRAPS S,SL</p> <p>MOLI STREET S/NNAV MARTORELLES, ES 8107 Sincerely: CALLE DEL MOLI 66202189 vendorkao+molltense@gmail.com Phone: +3 493 5708949</p>
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General information

OC Date: 10/01/25
Payment terms: ZZ9V-50 DAYS, 10TH AND 25TH DAYS
Shipping Terms: CPT
Currency: EUR

Additional Comments

Changes to the Purchase Order

In the event that KAO modifies an existing Purchase Order, you will be duly notified. For example, the notification you receive by email indicates that this is a Purchase Order that has been **revised** .

Likewise, when entering the order, you will be able to see that there are several revisions for the order, indicating which of these is the current version.

The screenshot displays the KAO Purchase Order portal interface. At the top, the 'Purchase Order #C137' is shown. A red arrow points to a 'Revision' dropdown menu, which lists three versions: '2 (Current) Dec 02', '2 (Current) Dec 02' (highlighted in orange), and '1 Dec 02'. To the right, the 'Select Customer' dropdown is set to 'Kao Chemicals Europe SLU y su afiliada Kao ...'. Below the revision menu, the 'General Info' tab is active, showing details such as 'Status: Issued - Sent via Email', 'Order Date: 12/02/24', 'Revision Date: 12/02/24', 'Requester: NOELIA GALLARDO', 'Email: ngallardo@kao.es', 'Payment Term: ZZE0-56 DIAS, día 10 Y 25', 'Attachments: None', 'Acknowledged: ☐', and 'Assigned to: '. The 'Shipping' tab is also visible, showing the 'Ship-To Address' as 'Av Puig dels Tudons, 10 P.I. Santiga Oficinas 08210 BARBERÀ DEL VALLÈS España Spain' and 'Terms: CPT'. Below the shipping information, the 'Shipment Tracking' section shows 'No shipment tracking.' with a '+ Add' button. At the bottom, the 'Lines' section is displayed, showing a table with one line item: 'Cable HDMI' with a quantity of 60, a unit price of 17.90, and a total of 1,074.00. The 'Invoiced' amount is 0.00.

Line	Type	Item	Qty	Unit	Price	Total	Invoiced
1		Cable HDMI	60	UNT	17.90	1,074.00	0.00

In the portal you will be able to see the current content of the order (current version), as well as the content of previous versions. Additionally, both the email and the print view of the order will clearly detail what the change was.

Purchase Order #C137-2

Bill To Address

KAO Corporation, S.A.U. (ESA58 408261)

Puig dels Tudons, 10
Pg.Ind. Santiga
Barberà del Vallès, Barcelona 08210
Attn:

Ship To Address

KAO Corporation, S.A.U. (ESA58 408261)

Av Puig dels Tudons, 10 P.I. Santiga
Oficinas
BARBERÀ DEL VALLÈS, España 08210
E590
Attn: NOELIA GALLARDO

Supplier Details

SCHINDLER S.A.

CTRA. BARCELONA
156-160
SABADELL, ES 8205
Attn: Contacto Proveedor
supliertestve+schindlerkao@gmail.com
Phone: +3 493 71 22636

General Info

PO Date: 12/02/24
Payment terms: ZZE0-56 DIAS, día 10 Y 25
Shipping terms: CPT
Currency: EUR

Comentarios Adicionales

Updated PO #C137-2

Line #	Item Details	Quantity	Unit	Price (EUR)	Total (EUR)
1	Cable HDMI	60	UNT	17.90	1,074.00

Sending Albarán (Supplier / Asn)

1- From the CSP portal, the supplier must go to the Orders module and from the order that he is going to send, select the Convert to ASN icon.

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to					View	Payment information 2	Search	
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C187	01/27/25	Issued	None	50 UNT of Cable HDMI	No	895.00 EUR		<div><div><div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div></div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div></div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div><div><div></div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> <div><div></div></div> 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2- He is going to create an advance shipping notification and must complete the information marked with an asterisk.

Create Advance Ship Notice

General Info

* ASN #

Status Draft

Gross Weight

Ship Date 


Expected Delivery Date 

* Fecha de Albarán 

* Adjunto Sin archivos seleccionados

3- He must complete the lines and send the delivery note.

Lines

1	Description	Shipped Qty	UOM	Received Quantity	Status
	Cable HDMI	<input type="text" value="50"/>	UNT 	0	Draft
	Supplier Part Number	PO #	PO Line	Po Line Quantity	
	None	C187	1	50.0	
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty	Supplier AUX Part Number
					None
	Match Reference				
	None				
	Comments	<div><div></div></div>			

 Add PO line #

Cancel

 Save

 Submit

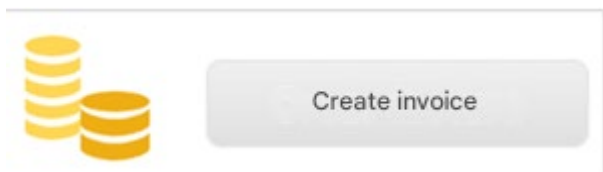
Purchase Order Status

Status	Detail
Issued	Purchase Order was created
Canceled	Purchase Order was cancelled and does not need to be processed.
Provisionally Closed	The purchase order was closed and you will not be able to issue an invoice for it. In case of an error, you can contact your customer to open the order.
Closed	The purchase order was permanently closed. No action can be taken with respect to this purchase order.

INVOICE REGISTRATION AND MANAGEMENT

Invoice With PO / Contract






From the CSP, you will have access to the purchase orders that KAO has generated. You can use the yellow coins icon or enter the order and from there click on the Invoice button.



In this case, the portal will take you to the invoice registration screen, bringing the relevant order data to this screen. This is to help you speed up the data registration process, you will need to complete and/or adjust the data as needed. For example, you will need to enter the invoice data itself, such as number, creation date, currency, among others. The values marked with a red asterisk (*) are mandatory fields and you will need to provide in the attached data field, the invoice associated with this billing record (PDF) and also attach the necessary supporting documents.

Create Invoice Create


General Info


* Invoice #	<input type="text"/>
* Invoice Date	<input type="text" value="01/24/25"/> 
Payment Term	ZZE0-56 DIAS, día 10 Y 25
Date of Supply	<input type="text" value="01/24/25"/> 
* Currency	EUR 
Delivery Number	<input type="text"/>
Status	Draft
* Image Scan	<input type="button" value="Seleccionar archivo"/> Sin archivos seleccionados
Supplier Note	<div><div></div></div>
Attachments 	Add File URL Text
Cash Accounting Scheme	<input type="text"/>
Margin Scheme	<input type="text"/>


Coupa brings most of the data from the purchase order to the invoice creation screen. At the top of the invoice, you will need to fill in the Series field. Note that among the data brought from the Order to the Invoice are also the Accepted Amount and Tax Amount fields.

* **Supplier** SCHINDLER S.A.

* **Supplier VAT ID** ES12345678A ▼



* **Invoice From Address** Schindler SA 
 Calle 50
 052121 Madrid
 Spain
 5451214


* **Remit-To Address** Schindler SA 
 Calle 50
 052121 Madrid
 Spain

* **Ship From Address** Schindler SA 
 Calle 50
 052121 Madrid
 Spain

In the Lines you can see the data that comes from the purchase order, so you only have to add the respective VAT and adjust the data if necessary.


Lines

Type	Description	Qty	UOM	Price	
	Mantenimiento ASCENSORES	2	AU	3,207.78	6,415.56 

PO Line **C136-1**  [Clear](#)

Service Sheet Line: None

Contract: Mantenimiento ASCENSORES ▼

Credit Line: None 

Supplier Part Number:

Billing: 242422-01-B_-500320

Taxes

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

In the **Totals and Taxes** section you can select the tax code or directly assign the corresponding rate.

to

Totals and taxes

Net total lines	15.00
<hr/>	
taxes	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
<hr/>	
Total taxes	0.00
Total net	15.00
Total	15.00

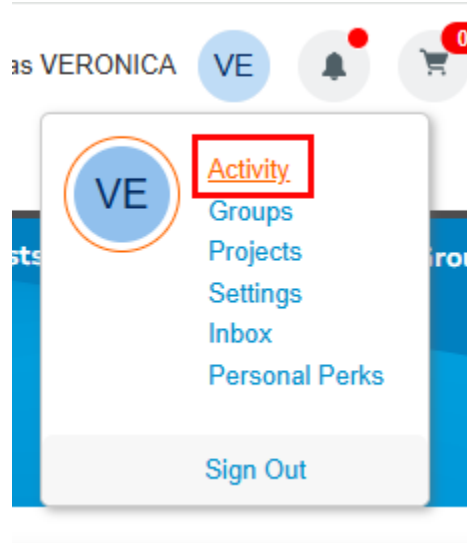
- Consider the drop-down list

NOTE: When adding the tax, the supplier must take into account which tax they are subject to, which they can verify in their lines and then see the drop-down and enter it.

Invoice Without PO - Contract / Financial

The supplier creates the invoice from the CSP, a blank invoice will open where he must complete the required information to send the invoice. The requester must identify the invoice from the KAO instance and complete the required information.

- 1- The requested user can enter the activity section to validate the invoice from his/her profile.



- 2- Once you enter you will see the table with the different modules for review, within these “Invoices” where you will identify that there is an invoice in Pending Action status.

Activity

Requisitions Orders Order Changes Invoices Receipts Returns Receipt Requests Contracts Forms More...							
Export to ▾		View My Invoices ▾		Advanced		Search	
<input type="checkbox"/>	Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions
<input type="checkbox"/>	29112024	SCHINDLER S.A.	None	3,850.00 EUR	Pending Approval	Coupa Supplier Portal	
<input type="checkbox"/>	Sup02122024	SCHINDLER S.A.	None	3,528.56 EUR	Disputed	Coupa Supplier Portal	
<input type="checkbox"/>	sup02122024-2	SCHINDLER S.A.	None	3,528.56 EUR	Approved	Coupa Supplier Portal	
<input type="checkbox"/>	Fin03122024	SCHINDLER S.A.	None	2,200.00 EUR	Pending Approval	Coupa Supplier Portal	
<input type="checkbox"/>	Fin04122024	SCHINDLER S.A.	None	2,750.00 EUR	Pending Action	Coupa Supplier Portal	

- 3- You must enter the invoice by selecting the invoice number, once you enter you will find some blank fields that you must fill in manually. To start editing, you must click on the “Edit” button.

Invoice #Fin04122024

[General Info](#) [Lines](#) [Totals & Taxes](#) [Comments](#) [Payments](#) [History](#)

[Add Tag](#)

General Info

Supplier SCHINDLER S.A. (Active)

Invoice # Fin04122024

Invoice Date 12/04/24

Payment Term ZZE0-56 DIAS, día 10 Y 25

Date of Supply 12/04/24

Currency EUR

Delivery Number None

Status Pending Action

Payment Due Date None

Supplier Note None

Attachments None

Image Scan [Factura.pdf](#)

Requester Veronica Estevez

Legal Invoice [download](#)

Bill To & Ship To

Chart of Accounts None

Bill To KAO Corporation, S.A.U.
Puig dels Tudons, 10
Pg.Ind. Santiga
08210 Barberà del Vallès Barcelona
Spain

Ship To No address selected

Buyer VAT ID ESA58408261

Supplier Info

Remit To No address selected

Supplier Provided Schindler SA

Remit To Calle 50
052121 Madrid
Spain

Invoice From Schindler SA
Calle 50
052121 Madrid
Spain

Total 2,750.00 EUR

[Edit](#) [Apply Tax Codes](#) [Dispute](#)

Invoice #Fin04122024 | SCHINDLER S.A. | 12/04/24

☒ Open next document

- 4- The chart of accounts information will be blank, when selecting “Edit” the fields that must be filled in by the applicant will open, in this case Chart of Accounts.

Invoice #Fin04122024

[General Info](#) [Lines](#) [Totals & Taxes](#) [Comments](#) [Payments](#) [History](#)

This invoice is locked for editing by you (cancel and unlock)

[Add Tag](#)

General Info

* Supplier SCHINDLER S.A.

* Invoice # Fin04122024

* Invoice Date 12/04/24

Payment Term ZZE0-56 DIAS, día 10 Y 25

Date of Supply 12/04/24

* Currency EUR

Delivery Number

Status Pending Action

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

Bill To & Ship To

* Chart of Accounts

* Bill To KCSA-Investment (E5)
KCSA-Expenses (E5)
Pg.Ind. Santiga
08210 Barberà del Vallès Barcelona
Spain

Ship To No address selected

Buyer VAT ID ESA58408261

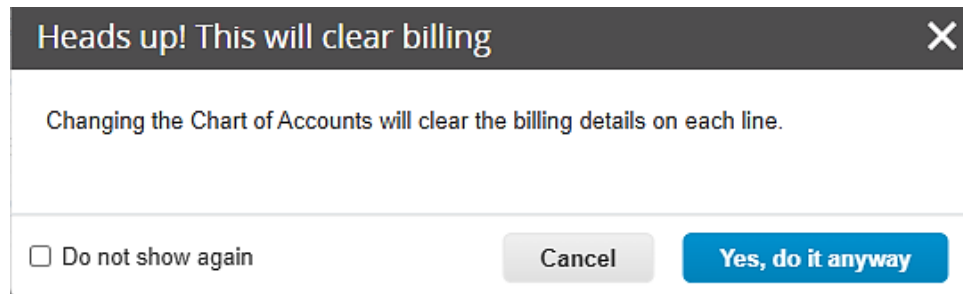
Supplier Info

Remit To

No address selected

Supplier Provided Schindler SA

- 5- When you select the account box, a confirmation window will open, click on the “Yes, do it anyway” button.



- 6- In the “Lines” section you must open the magnifying glass to reference the Billing information.

- 7- The chart of accounts will open and you must select each of the segments as appropriate, then click on “Choose”.

- 8- After referencing the billing information, you must “Submit”.

- 9- The invoice will go to the “Pending Approval” status. Once the requester accesses the invoice, he/she will be able to visualize the approval chain and its flow, where the approval by Invoicing will be pending.

Approvals

Add Approver

C6
CALLE DEL MOLÍ 66202189
17/12/2024

Facturación

Invoice Export

Approval Complete

Total 302.50 EUR

*** Comment** Required to reject

Edit Restart Approvals Withdraw Apply Tax Codes Revalidate Hold **Reject** **Approve**

Bypass Approvals

Credit Notes Registry

In the case of Credit Notes, you can register a Credit Note in the Portal if the invoice you are going to adjust has already been processed. The Credit Note registration will be done in the Portal, from the Invoices tab.

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices

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

Export to View Approved Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
NC0412	12/04/24	Approved	C136	-3,528.56 EUR	No		
sup02122024-2	12/02/24	Approved	C136	3,528.56 EUR	No		

You will need to choose the invoice you wish to adjust.

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ☒ Resolve issue for invoice number

☐ Other (e.g. rebate)

Cancel Continue

And then indicate whether the Credit Note is to cancel the entire invoice or to partially adjust it.

Credit Note
✕

How do you want to correct invoice "sup02122024-2" ?

☐ Completely cancel the invoice with a credit note i

☒ Adjust invoice with a credit note i

Cancel
Create

On the Credit Note creation/registration screen, you will find a yellow banner with a direct link to the invoice you are adjusting. Similar to the invoice registration, you will need to enter the data for the Credit Note and the supporting documentation.

Esta nota de crédito se aplica a la factura [sup02122024-2](#). Una vez aprobado, el crédito cancelará por completo el impacto de la factura sobre la transacción.

Información general

Número de nota de crédito: NC0412

Fecha de la nota de crédito: 04/12/24

Plazo de pago: ZZE0-56 DIAS, día 10 Y 25

Fecha original de suministro: 02/12/24

Divisa: EUR

Número de entrega: Ninguno/a

Estado: Aprobado

Término de envío: CPT

Nro. de factura original: sup02122024-2

Fecha de factura original: 02/12/24

Nota de crédito legal: [descargar](#)

Imagen escaneada: [Nota_Credito.pdf](#)

Notas del proveedor: Ninguno/a

Facturar y enviar a

Proveedor: SCHINDLER S.A.

Factura de: Schindler SA
Calle 50
052121 Madrid
Spain

Registro Mercantil: 5451214

Destinatario: Schindler SA
Calle 50
052121 Madrid
Spain

Origen de envío: Schindler SA
Calle 50
052121 Madrid
Spain

Id. de IVA del proveedor: ES12345678A

Cliente: Kao Chemicals Europe SLU y su afiliada Kao Corporation SAU

At the Note line level, you will need to indicate the type of adjustment you wish to make. That is, whether you will adjust based on the quantity on the invoice line or based on the amount (price).

Lines ☐ Line level taxes

Setting type: Amount

Guy	Cant.	Units of measurement	Price	
DE INTERNET WIFI	-1,0	Service	15,000.00	-15,000.00

purchase order line
41-1
Time/Service Sheet Line
None
Contract
Okland 20 internet contract
Supplier part number

By completing the data and attaching the corresponding support, you can send the Credit Note.

Sending from the Portal (CSP)

When sending an invoice or credit note from the portal, you will receive a warning from the portal itself, so that you can verify that the invoice/credit note you are about to send is in fact for that client (KAO) and for that amount.

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

Click on Send Invoice and Coupa will confirm the invoice processing, additionally you will be able to track that invoice/credit note from the portal in the Invoices module.

Inconsistencies in invoices

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to	View						Disputed	Search
Invoice #	Invoice Date	PO #	Total	Disputed Date	Commented	Dispute Reason	Comments	Actions
Sup04122024-2	12/04/24	C137	590.70 EUR	12/04/24	None	Tax rate missing or incorrect		
Sup03122024	12/03/24	C137	689.70 EUR	12/03/24	None	Price different from PO/Contract or Catalog		
Sup02122024	12/02/24	C136	3,528.56 EUR	12/02/24	None	Duplicate Invoice. Already paid or payment review in progress.		

In the event that KAO is not satisfied with your invoice, it will be placed in “Conflict”. The portal will notify you when an invoice is placed in conflict and you will be able to view the invoices in this condition, along with the reason why they were not accepted. When you enter the invoice, you will have visibility of the reason at the top of the invoice.

General Info

Invoice #	Sup02122024
Invoice Date	12/02/24
Payment Term	ZZE0-56 DIAS, día 10 Y 25
Delivery Date	12/02/24
Currency	EUR
Delivery Number	None
Status	Disputed
Dispute Reason(s)	Duplicate Invoice. Already paid or payment review in progress.

On the invoice you will find buttons to Cancel or Adjust the invoice.

Cancel Invoice

Adjust

Adjusting Invoice will create a “copy” of the originally recorded invoice, bringing all the data including the attached documentation. The purpose is that you can make the corresponding adjustments to this copy and send the corrected invoice. For example, if the invoice was not processed because it was recorded to an order without proper acceptance, you must first ensure that the acceptance has been entered in said order and then you can send the corrected invoice, in this case without making any changes to the invoice.

This credit note applies to invoice [Sup02122024](#). When approved, the credit will adjust the invoice's impact to the transaction.

General Info	From
* Credit Note # <input type="text"/>	* Supplier SCHINDLER S.A.
* Credit Note Date 01/23/25	* Supplier VAT ID ES12345678A
Payment Term ZZE0-56 DIAS, día 10 Y 25	* Invoice From Address Schindler SA Calle 50 052121 Madrid Spain 5451214
Original Date of Supply 12/02/24	* Remit-To Address Schindler SA Calle 50 052121 Madrid Spain
* Currency EUR	* Ship From Address Schindler SA Calle 50
Delivery Number <input type="text"/>	
Status Draft	
Original Invoice # Sup02122024	
Original Invoice Date 12/02/24	
* Image Scan <input type="button" value="Seleccionar archivo"/> Sin archivos seleccionados	

On the other hand, if the invoice was not processed because you assigned the wrong tax code, you will need to correct this information before sending the invoice.

The main reasons for dispute are:

Reason for Dispute
Duplicate invoice. Already paid or in the process of payment review.
The taxes indicated on the invoice do not correspond to those indicated in the purchase order.
The taxes listed on the invoice do not correspond to those specified in the purchase order.
Incorrect billing code
The credit note requires a negative line amount
The invoice currency differs from the purchase order currency
Inaccurate invoice date
Missing or incorrect discount rate
Incorrect payment terms
Invalid or missing purchase order reference

Price different from that of the purchase order/contract or catalogue
Quantity different from that of the purchase order/contract or catalog
Missing or incorrect tax rate
One or more of the invoice lines' units of measure differ from the unit of measure of the corresponding purchase order line
Attachment missing or in incorrect format
The invoice lines have not been registered as received within the system, therefore it is not possible to accept the invoice.
The invoiced items have not been recorded as received within the system; therefore, the invoice cannot be accepted.
Excess goods/services received
Goods/Services pending delivery
Invoice line price different from PO line price
Defective or incorrectly shipped product or excess shipment returned

Approval for Payment

When your invoice successfully passes all KAO validations/approvals, it will move to the Approved status. You can receive notifications when an invoice is approved. This is your confirmation that your invoice has been accepted and is scheduled for payment.

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to

View

Approved

Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
NC0412	12/04/24	Approved	C136	-3,528.56 EUR	No		
sup02122024-2	12/02/24	Approved	C136	3,528.56 EUR	No		

Proof of Payment

When the customer brings the payment details to the invoice, you will be able to receive an email notification and view the payment details in the portal.

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to

View

Payment Information

Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
------	------	-----------	--------	--------------	--------------	----------------	---------------------

When you access the invoice and go to the **Payments section** , you will find the details of the payment provided by the client. For example, the amount and date on which the payment was made.

Payments				
Status Fully Paid				
Paid-in-Full Date 12/02/24				
Payment Reconciliation Details				
Status	Date	Type	Description	Amount
Posted	12/02/24	Payment	Ref# 41457	3,528.56

To receive notification by email, you must have this option enabled. You can review the step-by-step instructions in the “ [Notifications](#) ” section of this manual.

HANDLING, MANAGEMENT AND REPORTING

Coupa features the concept of Views, which consists of various reports that come pre-loaded on the platform. Each section has its own views, which help you filter for transactions in a particular status. You can also create your own views, as well as export the data on screen to a CSV (Comma Separated Values) or Excel file.

For example, in the case of Purchase Orders, you can create a custom view to help you identify which Orders have already been accepted by KAO. To do this, go to the Purchase Orders screen and click **Create View** at the bottom of the list.

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to	View	Montos Aceptados	Search
PO Number	Order Date	Status	Acknowledged At
C141	12/03/24	Issued	None
C137	12/02/24	Issued	None
C136	12/02/24	Issued	12/03/24
C127	11/28/24	Issued	None

For every custom view, you should assign a name that will help you remember what its purpose is or what information the view will filter for you. You can create a view and share it with other users in your company who have access to this screen. However, we recommend that you be careful not to unnecessarily extend the list of views for everyone.

Create New Data Table View

General

Name Use a significant name for the view.

Visibility ☒ Only Me
☐ Everyone

Start with view

Define the conditions that purchase orders must meet to be included in your view (report).

Conditions

Match Conditions Add group of conditions

Filter By Filter Clause Filter Text

You can add one or more conditions (filters), as well as create groups of conditions and define whether the view should show only transactions that meet all the conditions or those that meet at least one of the conditions. The fields you can apply filters on will depend on which screen you are creating the view on (Orders vs Invoices). In this example, the purpose of the view is to only show Orders that have one or more comments regarding acceptance [\(receipt\) of the order](#).

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.

You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns

Comments

Payment Agreements

PO ID

Selected Columns

PO Number

Order Date

Status

Acknowledged At

Items

Unanswered Comments

Total

Assigned To

Actions

Default Sort Order

Sort by in ascending order.

[Cancel](#)
[Save](#)

In the Columns section, you will find the columns available for you to include in your view on the left side, and the ones that are part of your view on the right side. You should move the fields you do not require to the left side and the ones that should be included in your view to the right side. You can also change the order in which these fields/columns are to be displayed. Finally, you can (optional) define whether the results that the view is to display should be sorted based on a particular field. If you want to modify your view, you will need to click on the pencil icon next to the view name.

Purchase Orders

View created
✕

Instructions From Customer

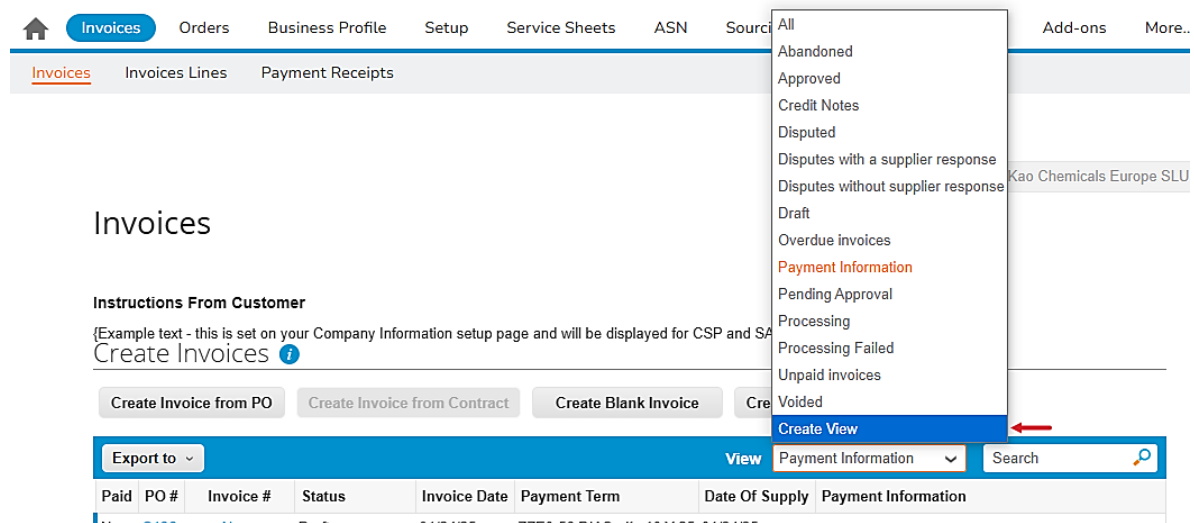
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the 📄 Action to Accept the Purchase Order and Create an Invoice using its data

Export to ▾
View Payment information 2 ✎ 🔍

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C141	12/03/24	Issued	None	50 UNT of Cable HDMI 50 UNT of Modem WiFi	No	8,782.50 EUR		📄 🖨️ 🗑️

Invoices also has a series of views that help you filter by transactions in a particular status or distinguish invoices from credit notes, among other options.



The screenshot shows the Coupa Invoices interface. At the top, there is a navigation bar with tabs: Invoices (selected), Orders, Business Profile, Setup, Service Sheets, ASN, and Sources. Below this is a sub-navigation bar with: Invoices (selected), Invoices Lines, and Payment Receipts. The main header area displays 'Invoices' and 'Instructions From Customer' with a note: '(Example text - this is set on your Company Information setup page and will be displayed for CSP and SA)'. Below this is a 'Create Invoices' button with an information icon. A row of buttons includes 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Invoice from PO'. A dropdown menu is open, listing various filter options: All, Abandoned, Approved, Credit Notes, Disputed, Disputes with a supplier response, Disputes without supplier response, Draft, Overdue invoices, Payment Information (highlighted in red), Pending Approval, Processing, Processing Failed, Unpaid invoices, and Voided. At the bottom of the dropdown is a 'Create View' button with a red arrow pointing to it. Below the dropdown is a 'View' section with a 'Payment Information' dropdown and a 'Search' field. The main table has columns: Paid, PO #, Invoice #, Status, Invoice Date, Payment Term, Date Of Supply, and Payment Information. The first row of data shows 'PAID', '0100', '1', 'PAID', '01/01/2020', '30 DAY NET 30', '01/01/2020', and 'PAID'.

Kao



*A new beginning,
leading to the
transformation*