# Navigating the Coupa Supplier Portal (CSP)

March 2023

# Benefits for Coupa Supplier Portal (CSP)

- Free to Use
- Easy to set-up
- Manage Purchase Orders from all customers who use Coupa
- Raise Invoices & Credit notes
- Track status of Invoices

**New Suppliers:**

If you are a new supplier currently being onboarded please refer to

**How to complete the NSIR Form**

**Existing Suppliers:**

If you are existing Supplier, please ensure you have a legal entity set-up in your CSP: Please refer to

**How to set-up Legal Entity**

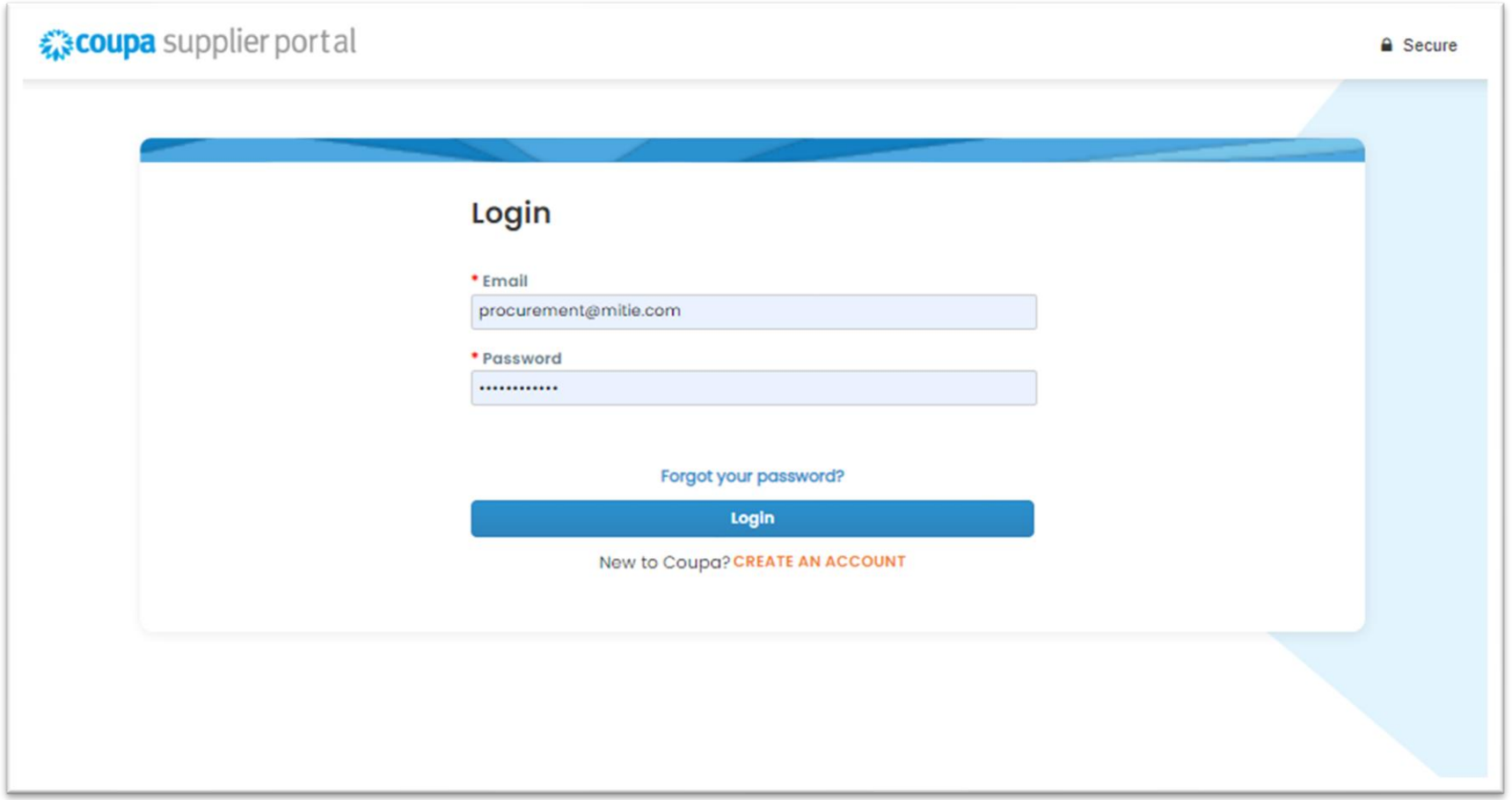
- If you need to update your important company information for e.g. Bank details, Insurance details etc. please email **supplier.maintenance@mitie.com** and they will take appropriate action.

# Coupa Supplier Portal – Register / Login

**Link to access the Coupa Supplier Portal (CSP)**

**Login here**

**Coupa Supplier Portal (coupahost .com)**




**Tip:**

- **Bookmark the link/Add it to favourites**
- **The email address used to login should be the same as the primary contact held on Mitie's Vendor Master**
- **If you already use Coupa with other customers, please provide the email address for your current CSP administrator**

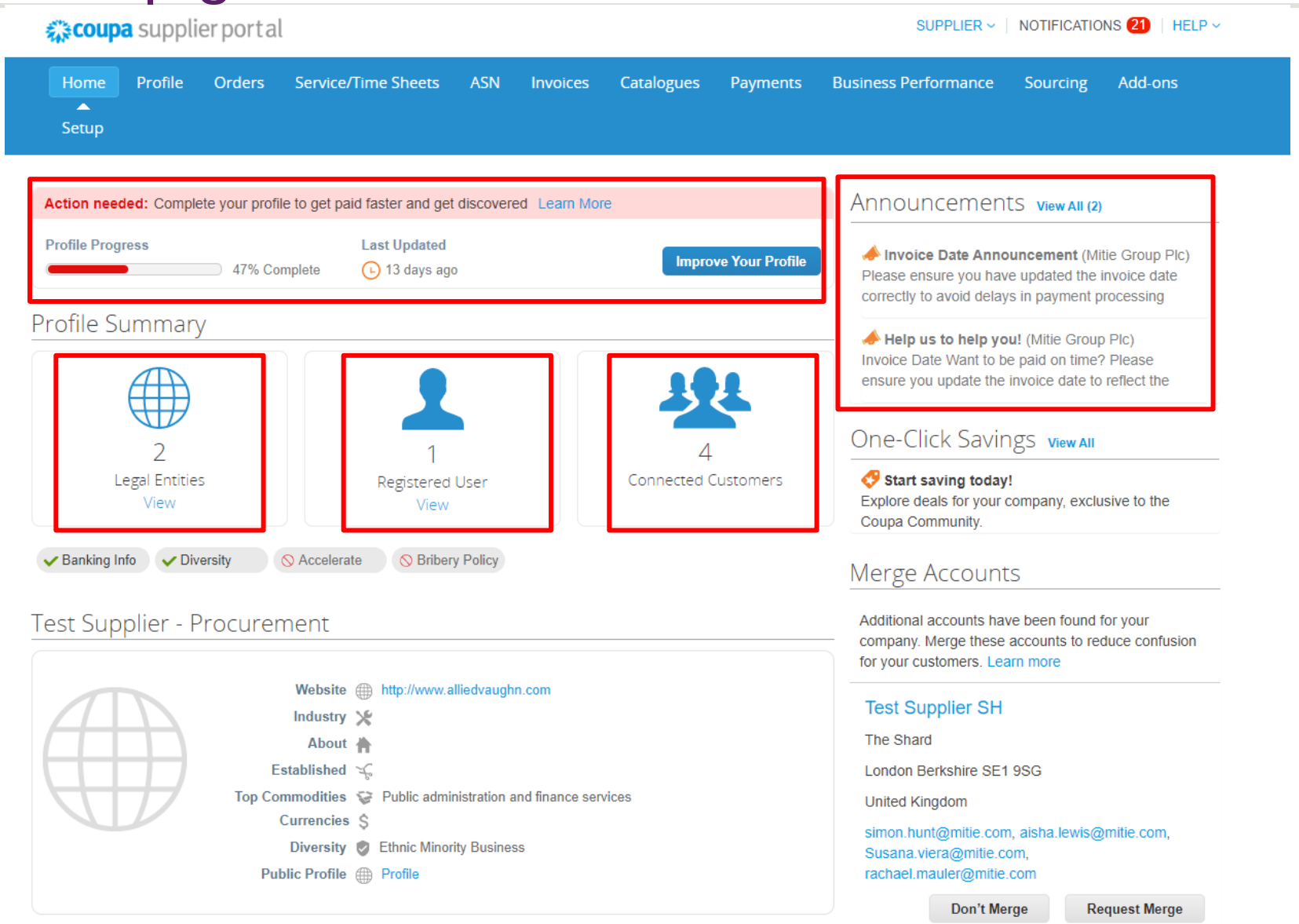
# Coupa Supplier Portal – Homepage

- **Profile** – Completing these details doesn't update Mitie's vendor Master (Not essential for Mitie)

- **Profile Summary –** gives information on number of

  **Legal Entities**
  **Registered User**
  **Connected Customers**

- **Announcements** – View Customer announcements, really important to check this, all important updates are communicated through this section.



# Coupa Supplier Portal – Homepage Menu

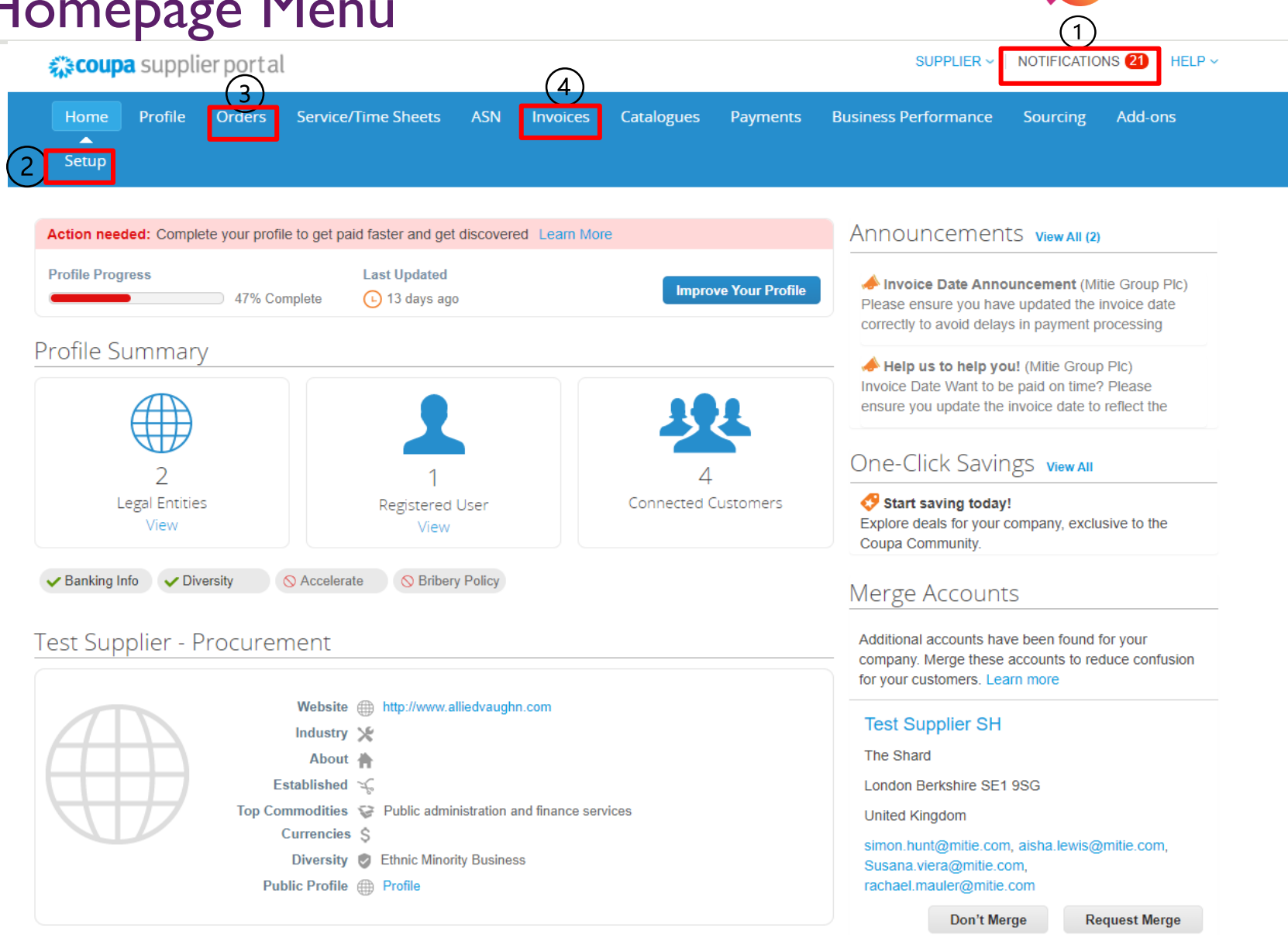
**These are the main sections to use for Mitie.**

1. **Notifications** – Find all notifications here

2. **Setup** - Manage Users, Merge Requests, Legal Entity Setup.

3. **Orders** – Find all your purchase orders here and use Gold Coins to create Invoices. P.S. Please Do NOT use red coins.

4. **Invoices** – View Invoices & create Credit Notes



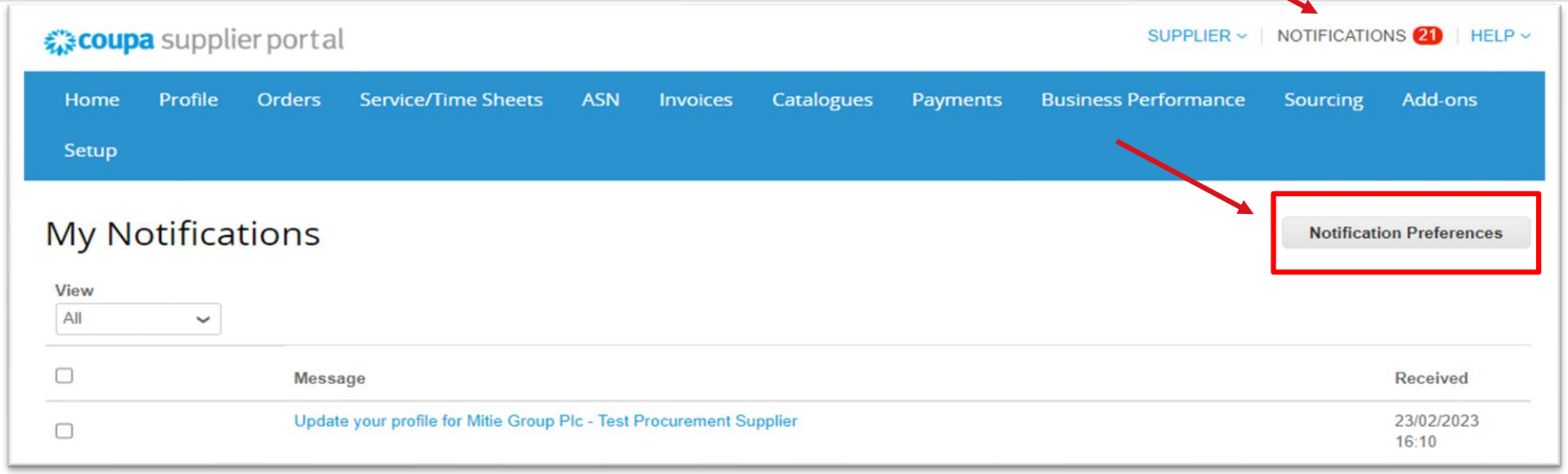
# Notifications

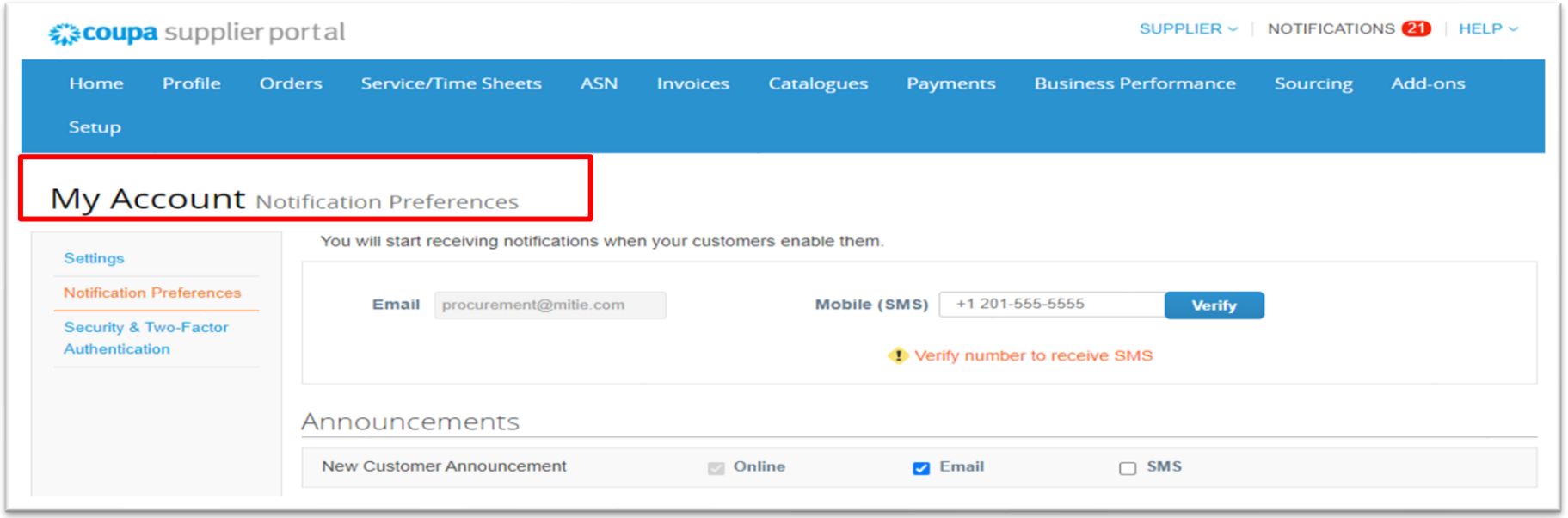
View all notifications received from your customer

To manage notification preferences refer to this guide

**How to manage Notification Preferences**

- Click on Notification Preferences to update as needed
- Review each option and tick or untick against the relevant option 'Online', 'Email' and/or 'SMS' as required.
- If you select the SMS option, a pop up window will open 'Enable your mobile phone number to receive SMS notifications on the My Account page.' you will need to update a mobile number.
- Once you have made your changes remember to click Save at the bottom.



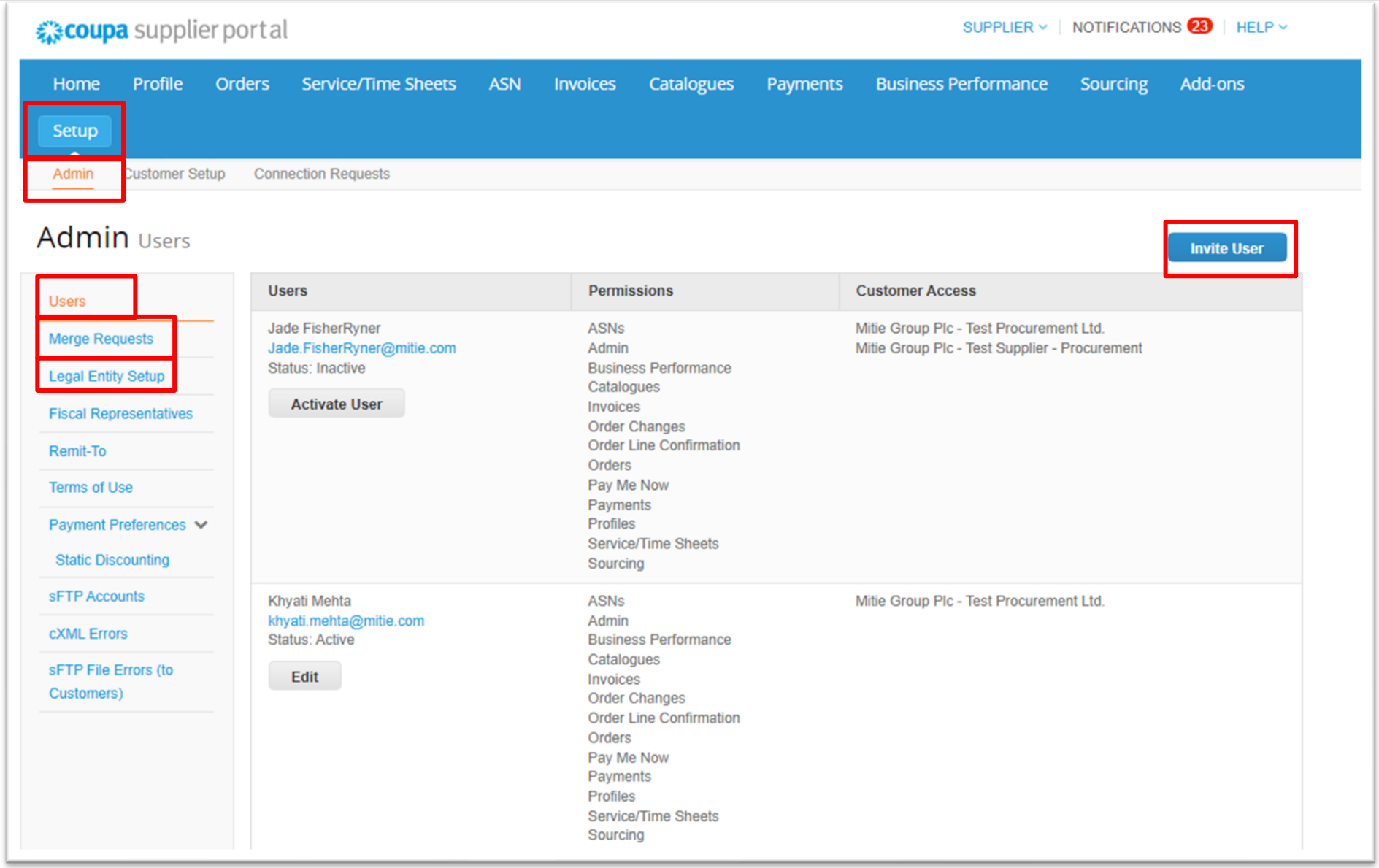



# Setup

## Admin:

- **Users**
  - **– Invite new Users** (employees/colleagues new to CSP)
  - **– Manage permissions and customers**
  - **– Merge** Requests: merger with other existing CSP users from within your company

- **Add Legal Entities for your company (for Mitie we can accept only one bank account and remit-to address per supplier)**

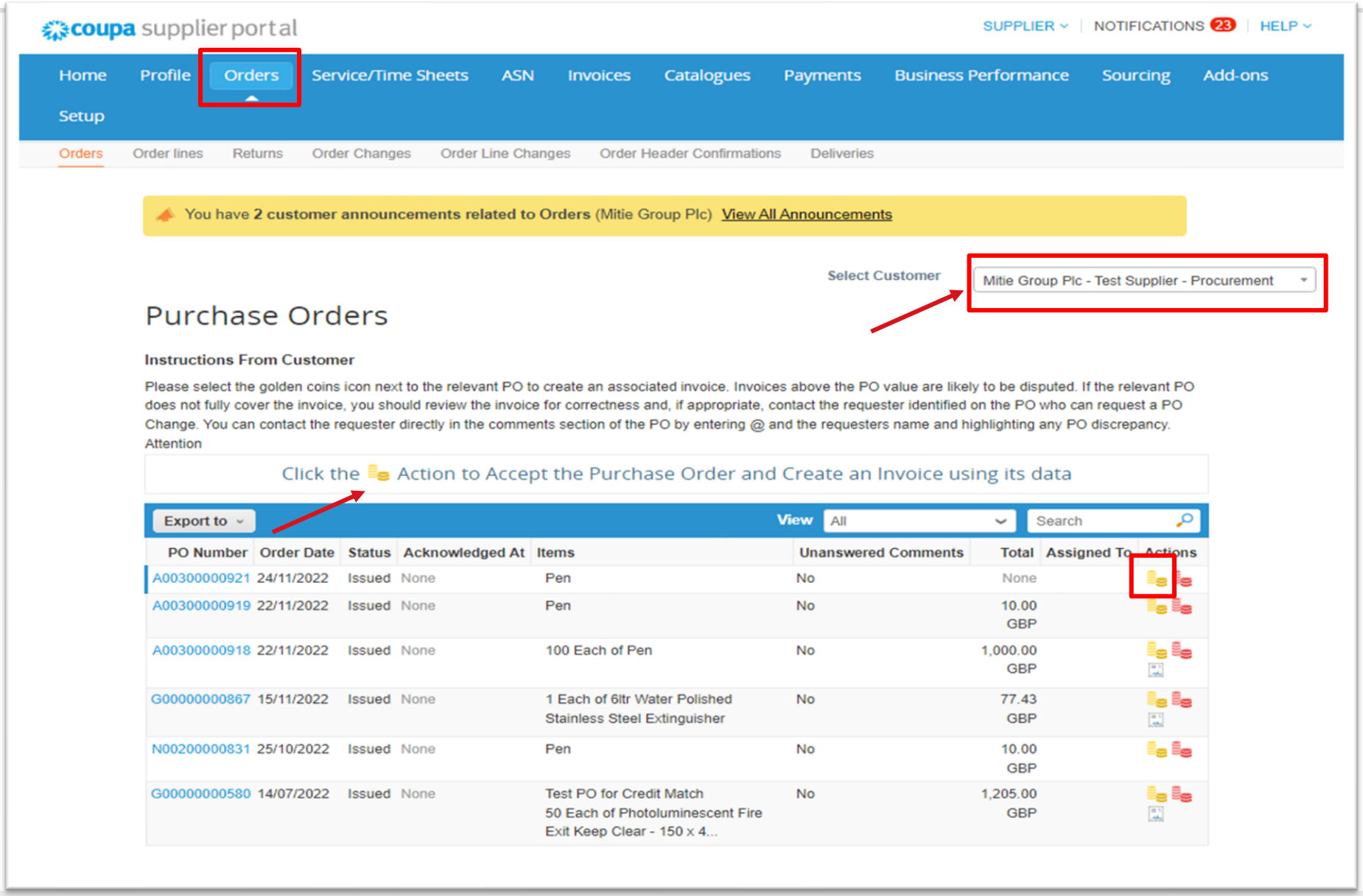


# Orders (Purchase Orders)

- Find all of your purchase orders (POs).
- **Select customer** to view purchase orders from different customers
- **Create an invoice** on this page by clicking on the gold stack of coins or clicking on the PO number.

Note: Please do NOT use the red coins. If you need to raise a credit note go to the Invoices section)

If you do not see the purchase order you are looking for, please reach out to your company contact.



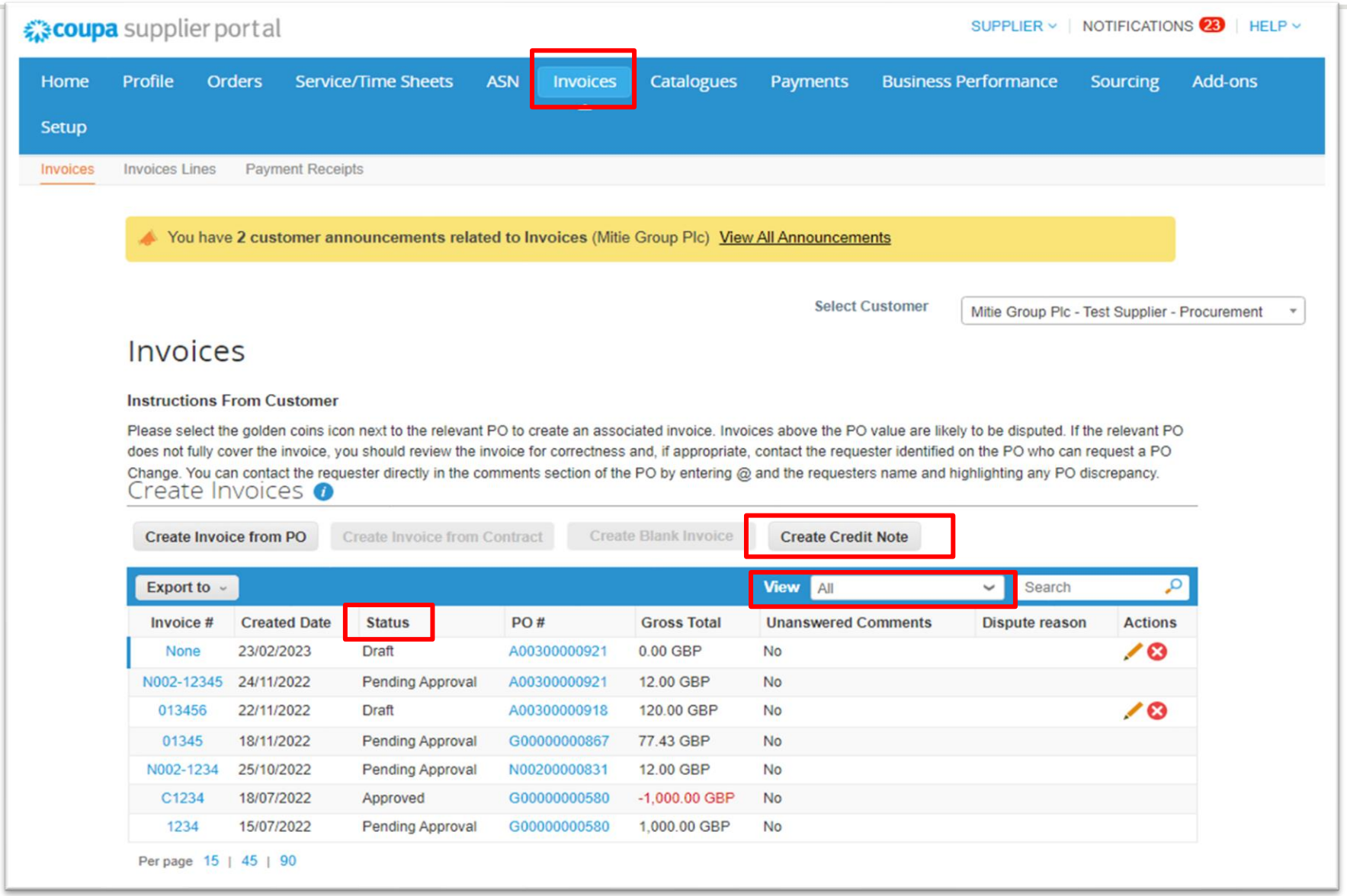
# Invoices

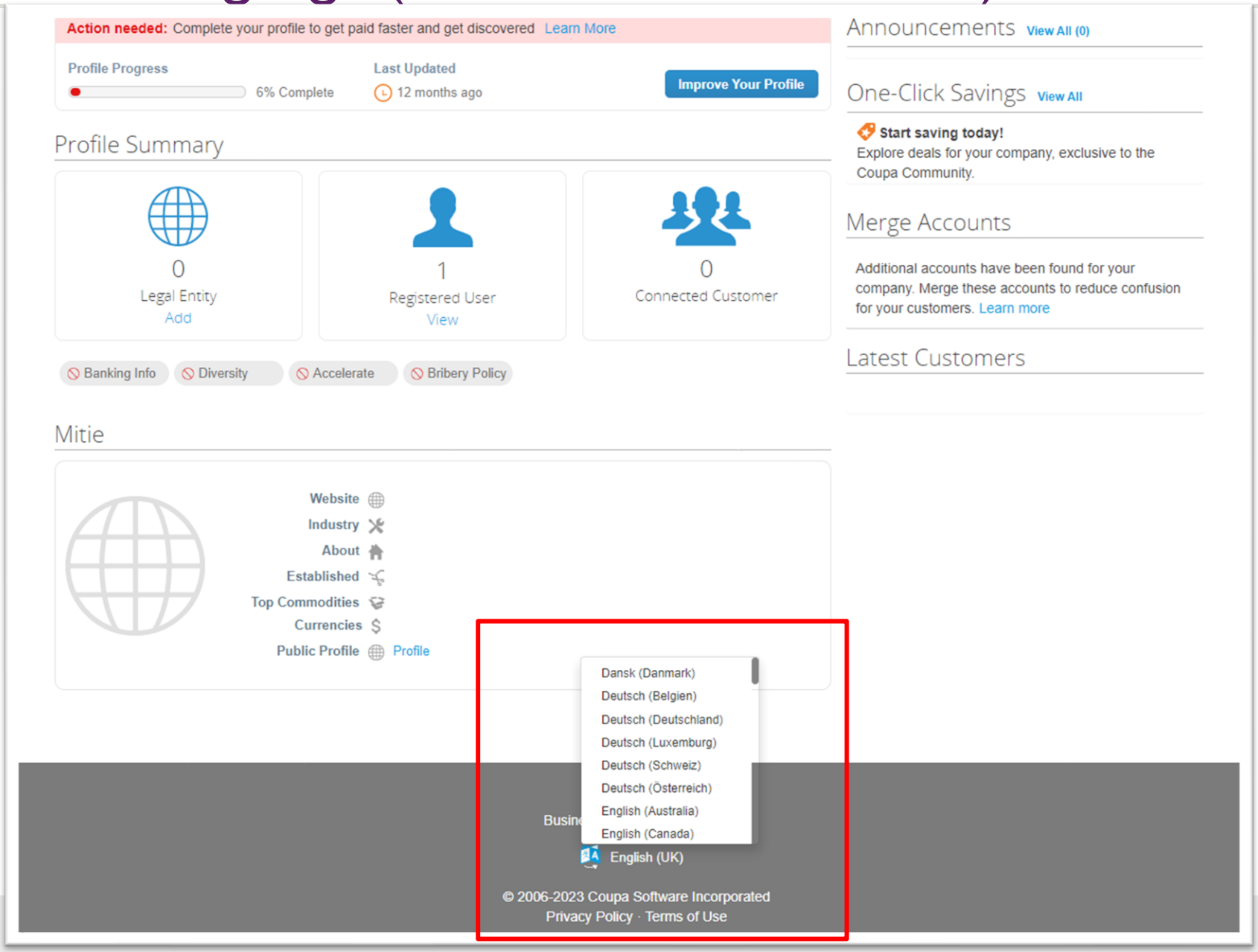
**Status** - Follow the **Status** for each of the submitted invoices.

- **Pending approval** – Awaiting Good receipt or Remit to address for 1st invoice submitted through CSP.
- **Approved –** Invoice is okay to pay and exports to payment system and will be paid when due
- **Disputed** – Invoice exceeds the PO amount and you need to use the resolve button to credit the invoice and contact requester if PO needs uplifting.
- **Draft** – Invoice has not been submitted to Mitie, you can finish or delete draft.

**View** Use the **View** dropdown to sort by status or "Create View" to customize what you see

**Create Credit Notes – Use this to create Credit notes against invoices.**



# Change your CSP Account Language (includes dates formats)

- Scroll to the bottom of your screen
- Select your required Language from the pop up
  You can change your CSP language, click on the language button (English (UK) shown below)
- Once you select the required Language you will see your CSP account update
  (if your account was English (US) and you change to English (UK) you will notice the date formats change to UK format from US format)