How to set-up your Invoices View in your Coupa Supplier Portal (CSP)

Aug 26

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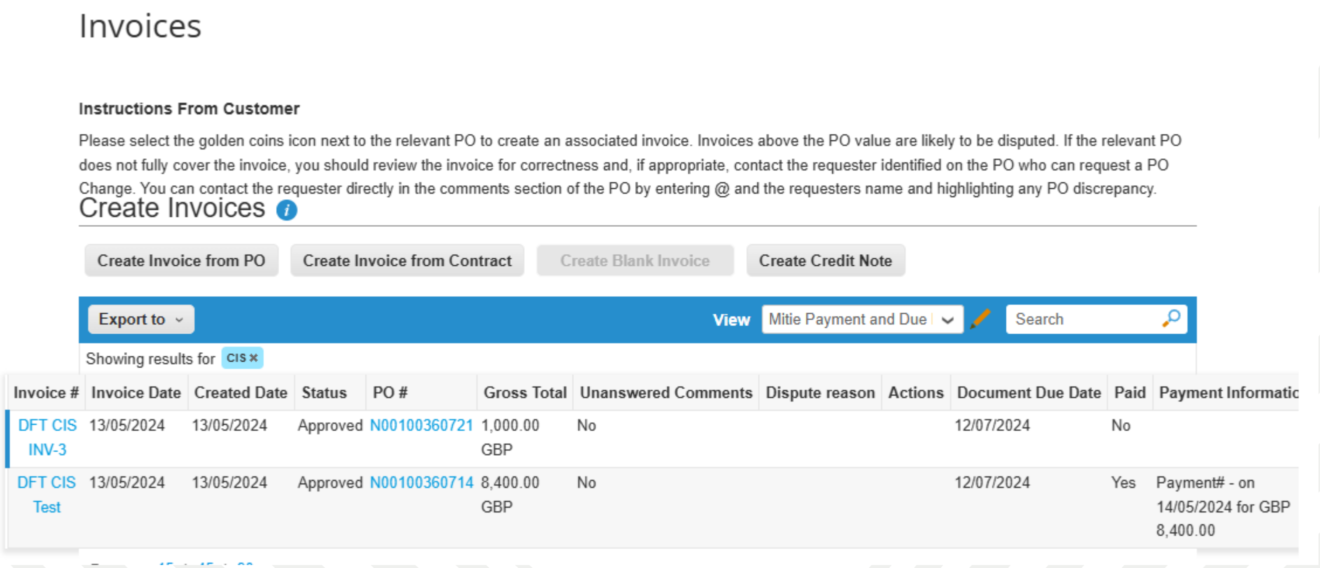
Invoices

This guide will help you set-up your invoice's view in your Coupa supplier portal (CSP) to show payment details & invoice due date from Mitie by creating a new view.

Following this setup will enable you to view invoice date, document due date, paid status and payment information to your view.

You will require a CSP account



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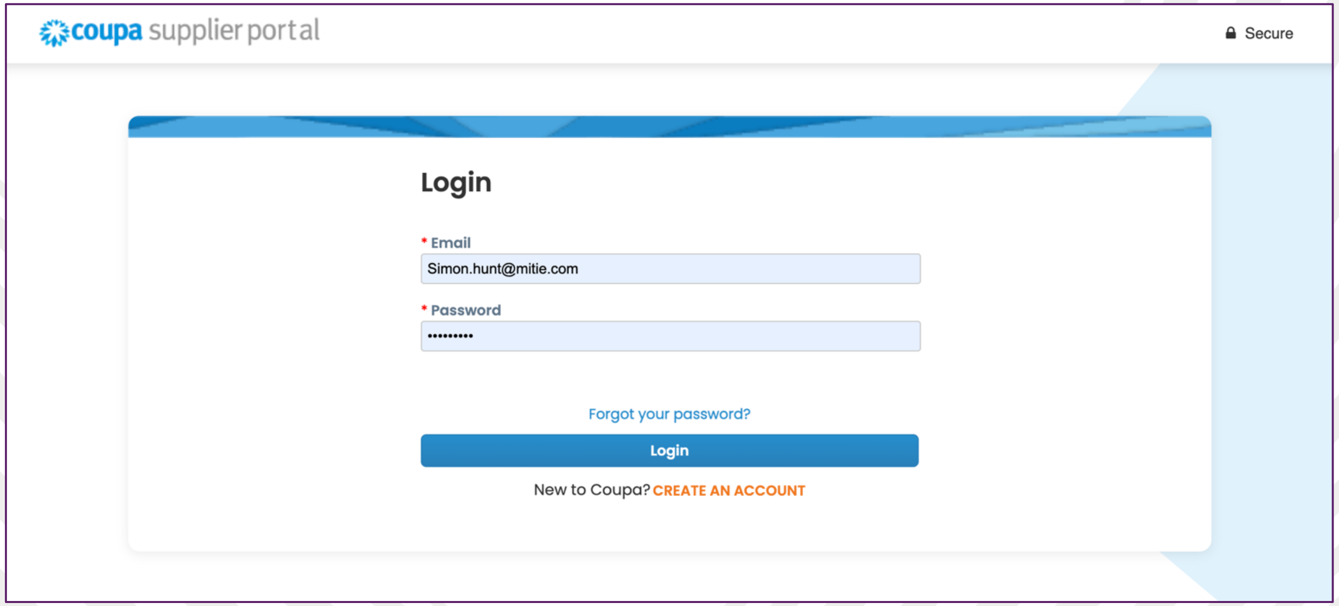
Login to your CSP Account

Log into your CSP account

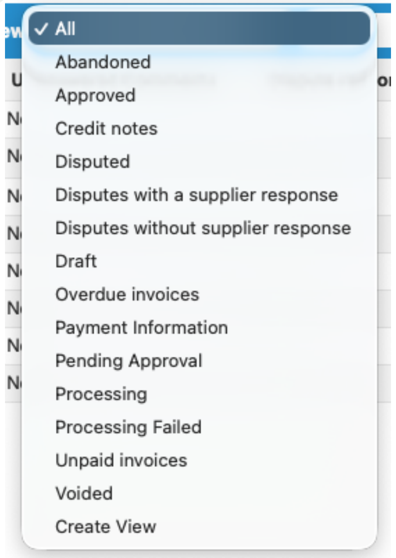


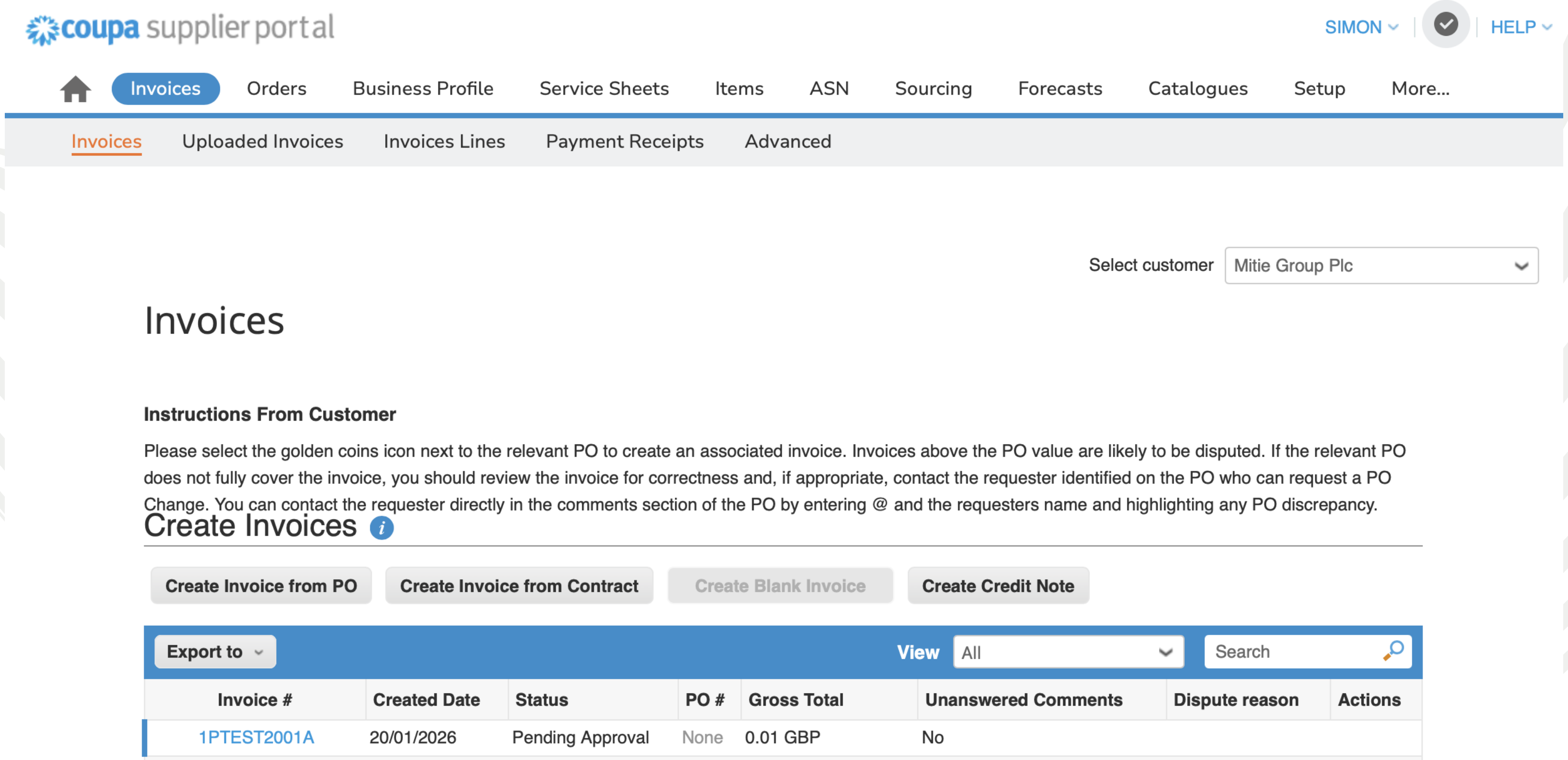
Invoices

At the top of your screen click on "Invoices" tab.

In the smaller blue bar,
Click on the downward arrow in the View box

This will open a dropdown.
Click Create View at the bottom.





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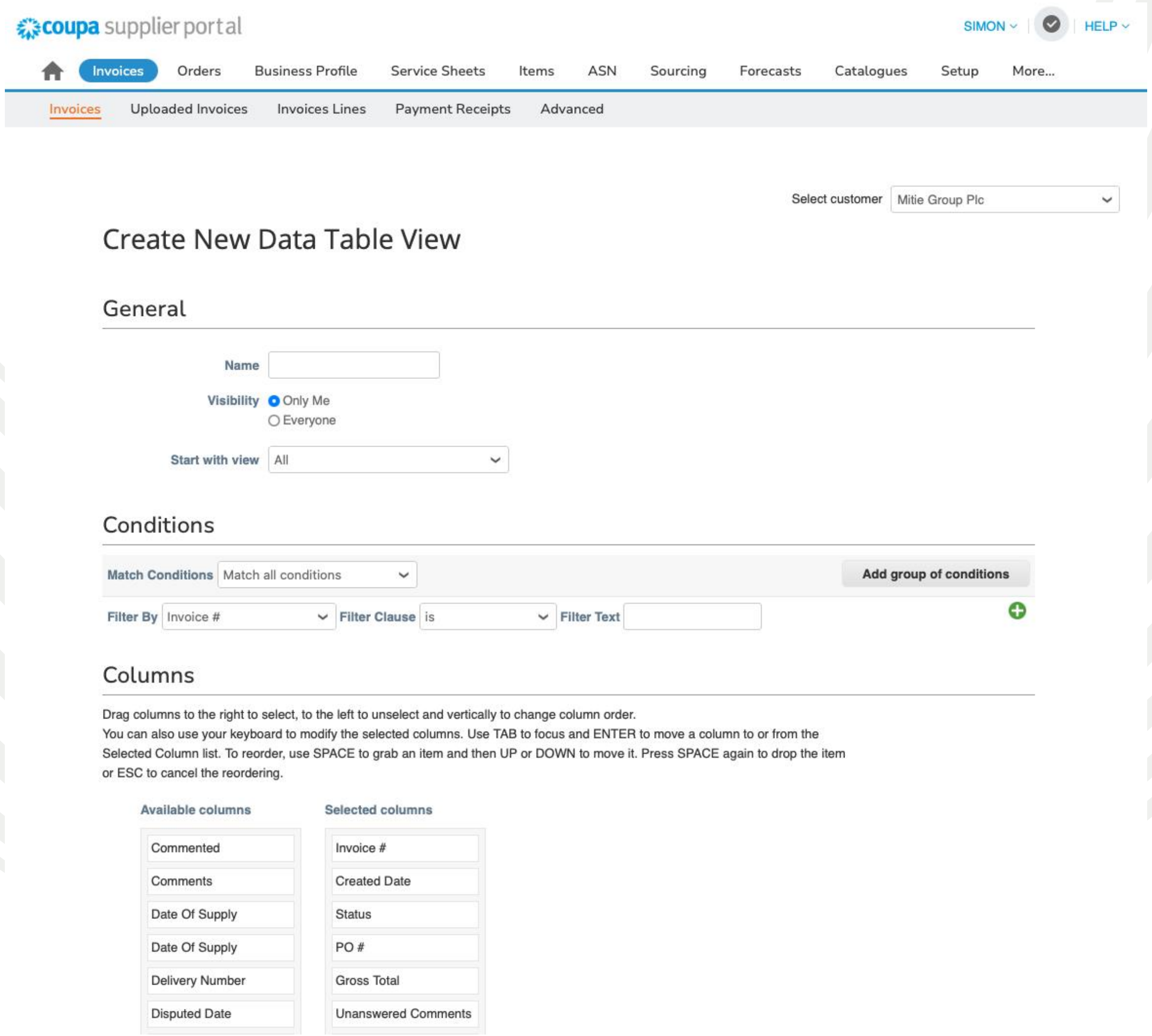
Create New Data Table View

When you select Create View it will open the Create New Data Table View.

In the name field you can call it your company name view i.e.'Mitie Payment and Due Dates' as an example or whatever you decide what your report name should be.

In the Visibility section you can make the report available to just your account or everyone who has access to your companies CSP.

Then go to Columns section.

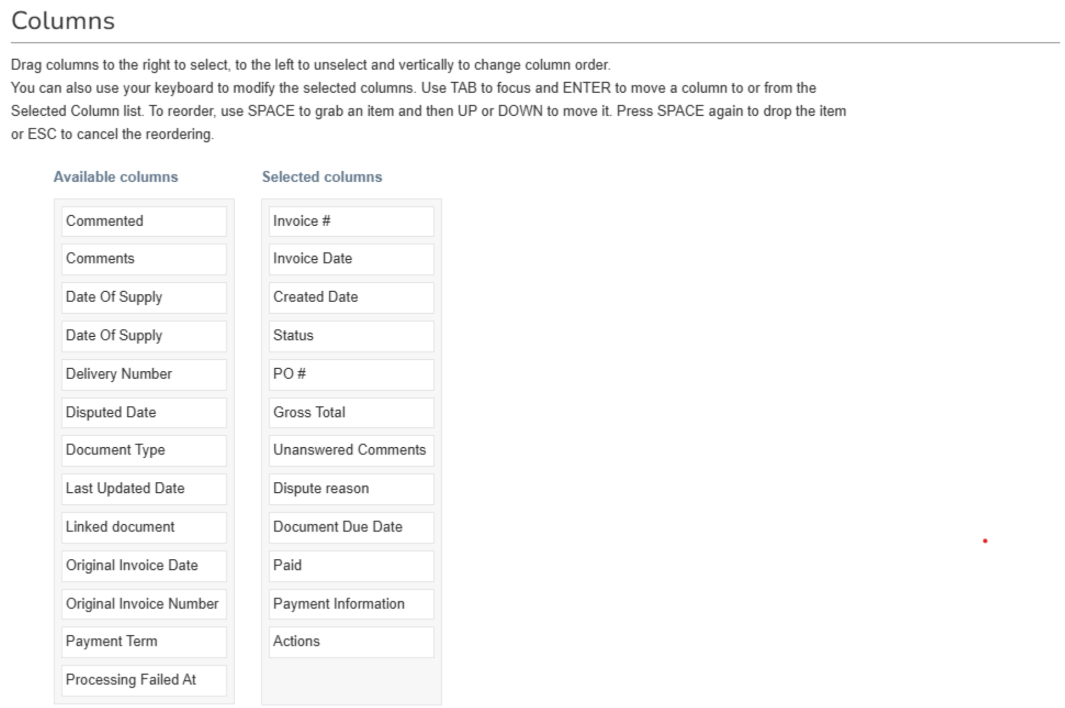


Create New Data Table View - Columns

By using drag and drop:

In the Available columns section on the left you can drag and drop each criteria required into the Selected columns section.

Ensure you have these as mandatory criteria in the Selected columns, Invoice Date, Document Due Date, Paid & Payment Information as per the example shown.



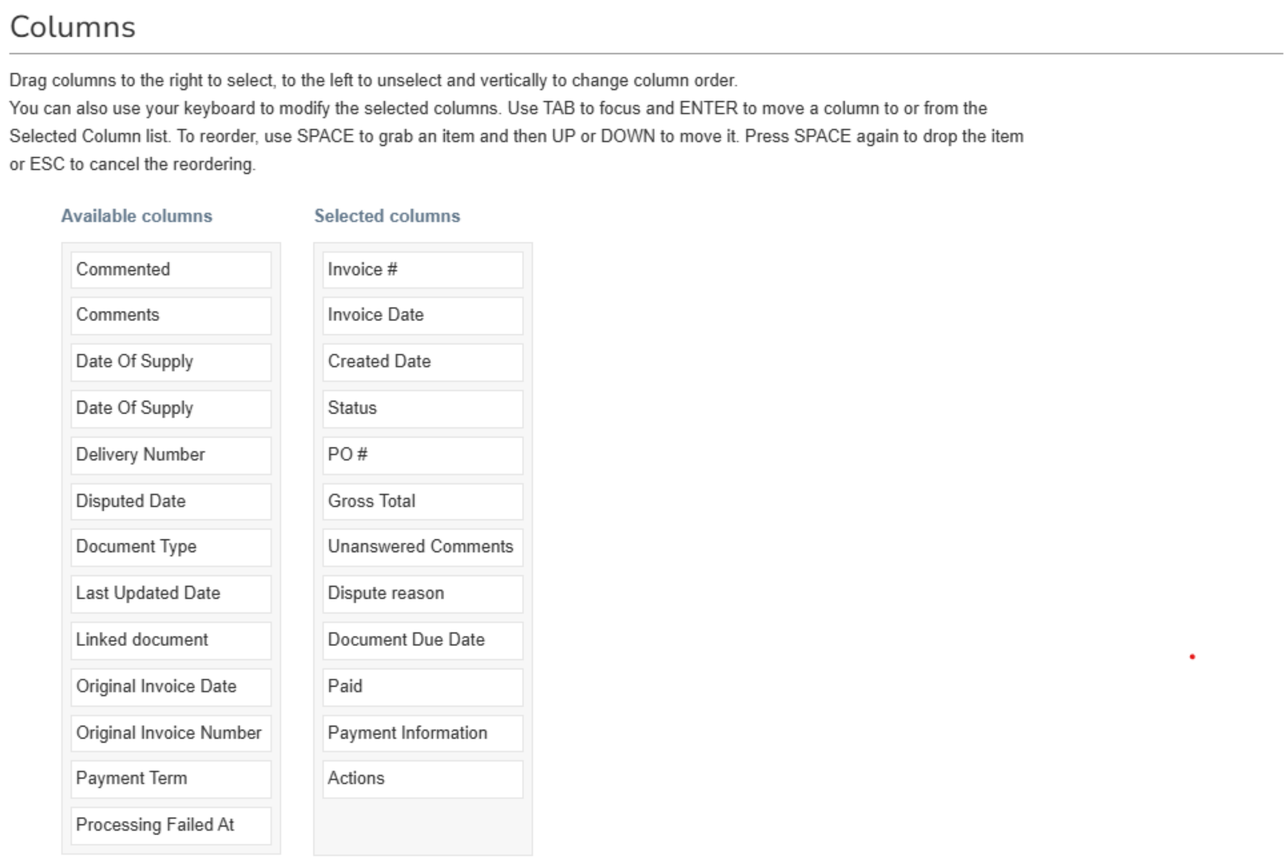
Create New Data Table View - Columns

Your Selected columns should look like the example shown.

You can drag and drop more options or change the order of them as required.

Once you're happy with your selection scroll to the bottom of the page.

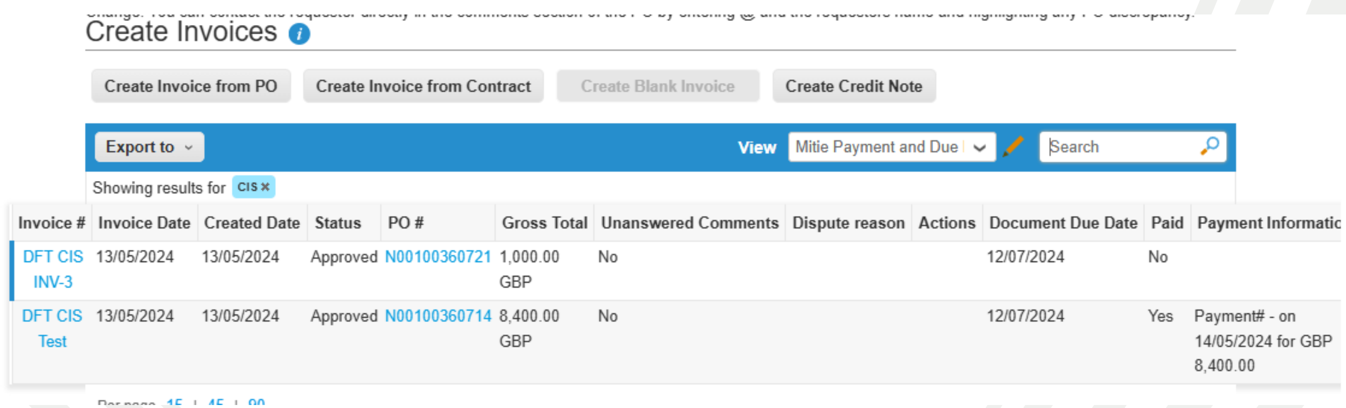
Click Save



Invoices – New View

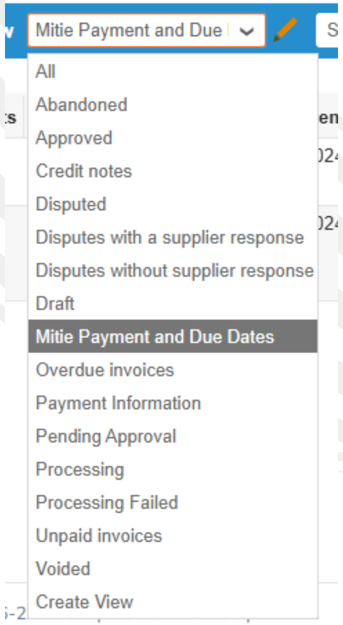
Your new view should be shown on your screen with the columns you selected.

To expand your screen click



You will now see real time information for Document Due Dates once your invoice is approved. Payment information will also be available when Mitie have settled your debt.

You will still be able to see all the views by clicking the down arrow (see example) to switch between Views.



Supplier support for using the Coupa Supplier Portal (CSP)

1st

Coupa CSP Navi is a Coupa "Supplier Assistance Agent" — an AI-powered tool that helps suppliers get quick, accurate answers about using the Coupa Supplier Portal (CSP) by drawing on Coupa's official documentation. This is found on the supplier's account at the bottom right-hand side of the CSP homepage.

2nd

Mitie's dedicated supplier website with FAQs and guidance for all Mitie's suppliers.
Using Coupa | Mitie Suppliers
Coupa is a self-service portal where you can obtain information regarding Purchase Orders, invoice due dates , status updates & payment information. Guides are available on the webpage.

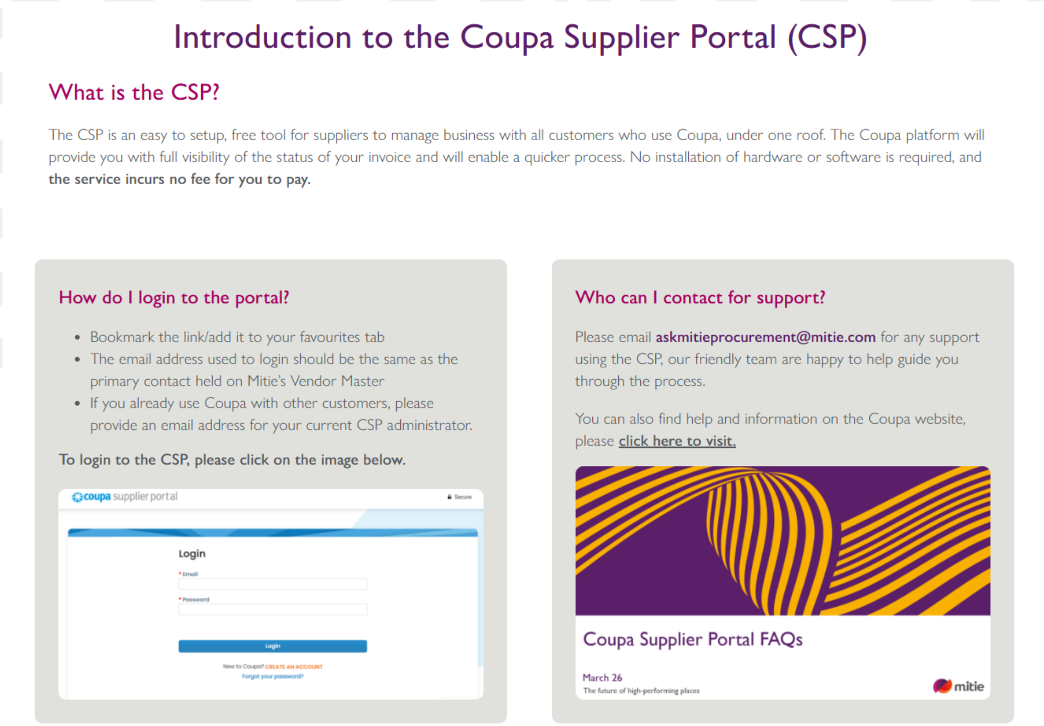
3rd

Please email askmitieprocurement@mitie.com for any support using the CSP.
If you have been unable to self-service using the Mitie guides and have an enquiry in regard to any invoice/ payment queries, please email accountspayable@mitie.com

Our Dedicated Supplier Website

Mitie has a dedicated supplier website Mitie Suppliers
You will find lots of How to Guides.
Each section in this document will have reference to How to Guides

Click **How to Guides** to expand



Introduction to the Coupa Supplier Portal (CSP)

What is the CSP?

The CSP is an easy to setup, free tool for suppliers to manage business with all customers who use Coupa, under one roof. The Coupa platform will provide you with full visibility of the status of your invoice and will enable a quicker process. No installation of hardware or software is required, and **the service incurs no fee for you to pay.**

How do I login to the portal?

- Bookmark the link/add it to your favourites tab
- 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 an email address for your current CSP administrator.

To login to the CSP, please click on the image below.

Who can I contact for support?

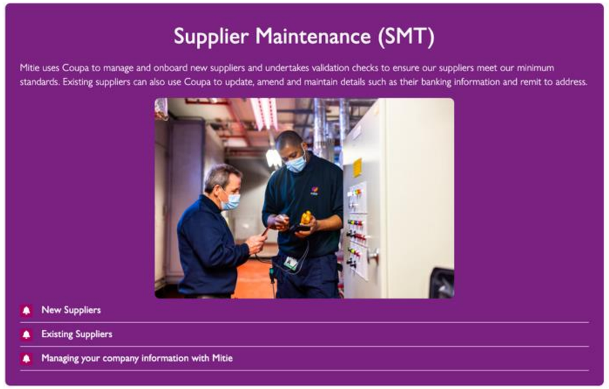
Please email **askmitieprocurement@mitie.com** for any support using the CSP, our friendly team are happy to help guide you through the process.

You can also find help and information on the Coupa website, please click here to visit.

How to manage / setup your CSP

Click for How to Guides

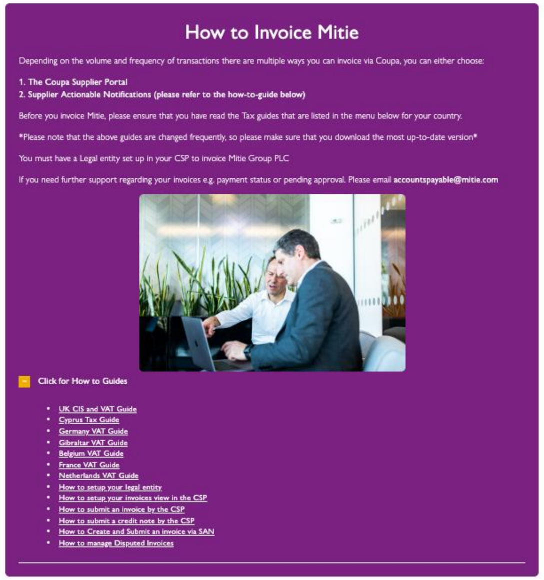
- How to navigate the CSP
- How to register and setup your CSP
- How to setup your legal entity
- How to set-up Two-factor Authentication
- How to update your details on the CSP
- How to manage user or merge requests in your CSP
- How to update Notification settings
- How to manage your preferred language in your CSP



Supplier Maintenance (SMT)

Mitie uses Coupa to manage and onboard new suppliers and undertakes validation checks to ensure our suppliers meet our minimum standards. Existing suppliers can also use Coupa to update, amend and maintain details such as their banking information and remit to address.

- New Suppliers
- Existing Suppliers
- Managing your company information with Mitie



How to Invoice Mitie

Depending on the volume and frequency of transactions there are multiple ways you can invoice via Coupa, you can either choose:

1. The Coupa Supplier Portal
2. Supplier Actionable Notifications (please refer to the how-to-guide below)

Before you invoice Mitie, please ensure that you have read the Tax guides that are listed in the menu below for your country.

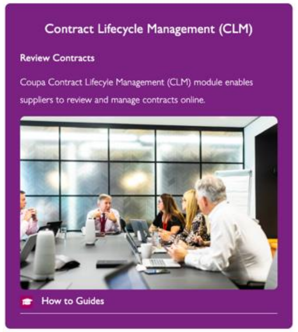
Please note that the above guides are changed frequently, so please make sure that you download the most up-to-date version

You must have a Legal entity set up in your CSP to invoice Mitie Group PLC

If you need further support regarding your invoices e.g. payment status or pending approval. Please email **accountspayable@mitie.com**

Click for How to Guides

- UK CIS and VAT Guide
- Cyprus Tax Guide
- Germany VAT Guide
- Gibraltar VAT Guide
- Belgium VAT Guide
- France VAT Guide
- Netherlands VAT Guide
- How to setup your legal entity
- How to setup your invoices view in the CSP
- How to submit an invoice by the CSP
- How to submit a credit note by the CSP
- How to Create and Submit an invoice via SAN
- How to manage Disputed Invoices



Contract Lifecycle Management (CLM)

Review Contracts

Coupa Contract Lifecyle Management (CLM) module enables suppliers to review and manage contracts online.

How to Guides

Source to Contract (S2C)

Participate in eAuctions

Coupa eSourcing and eAuctions tools enable Suppliers to interact online with Mitie during the Sourcing and eAuction process.

How to Guides

If you cannot find the help you need, please email askmitieprocurement@mitie.com

Website address: https://mitiesuppliers.com/mitie-supplier-faq/using-coupa-2/