

COUPA USER GUIDE

COUPA SUPPLIER 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 influential figures of the solution.

4.000+
Customers

8M+
Suppliers

100+
Countries

Multi
Currency

Multi
Language

Rated #1 by top analysts



COUPA SUPPLIER PORTAL

The Coupa Supplier Portal is a free tool for suppliers to easily interact and collaborate with XIGNUX.

The Portal facilitates transaction management. You can review purchase orders, draw reports, send messages to the purchasing team, etc.

Interacting on the **Portal has no cost** and is an opportunity for other companies, Coupa clients, to find them.

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

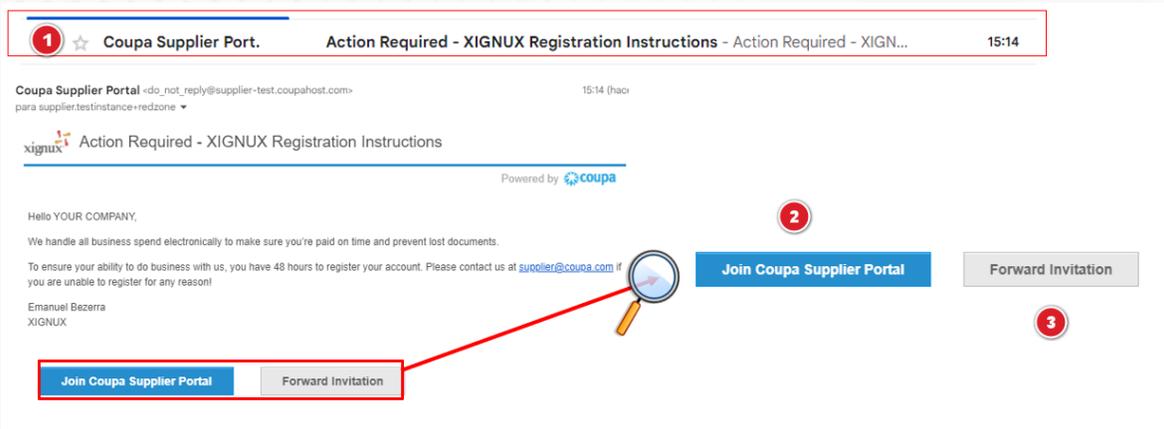


BENEFITS OF CSP FOR SUPPLIERS



COUPA SUPPLIER PORTAL REGISTRATION - CSP

1. The supplier will receive an email from the Coupa Supplier Portal, indicating that KTSA has invited them to register for the Coupa Supplier Portal:



2. Using the **Join Coupa** button you will be directed to the **Coupa Supplier Portal** to begin your registration.
3. **Forward this invitation** button you can redirect this invitation to someone else in your organization by entering their email.

Once you click on the **“join Coupa” option**, the portal will ask you to register.

4. The next step will be to configure your password, country and tax identification, accept the privacy policies and terms of use of COUPA. After this click on **Create an account**.

5. Enter the code sent to your email:

Email Verification

We sent a one time verification code to
supplier.testinstance+test@gmail.com

Didn't receive the Verification Code? [Request a New Code](#)

Next

Your Coupa Verification Code

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

284131

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

Business Spend Management

6. As a next step, it is necessary to complete the following form with the company's contact information. Then select **Next**.

Your Contact Info

* First Name * Last Name

Work Phone

Country/Region Area/City Local Extension

* Business Website

 I do not have a website

* Country/Region of Primary Address

Next

7. You can skip some sections by clicking on the “**Skip for now**” button or to finish your registration you can click on the “**X**”:

Make Sure You Get Paid
Confirm location addresses

Primary

* Country/Region
Colombia

* Address Line 1

* City State * Postal Code

* Country/Region * Tax Registration 123456789

I do not have a Tax ID + Additional Tax Registration

Invite user

Send Invite

Next

Skip for Now

8. You can complete the information from the “**Edit Profile**” button:

coupa supplier portal GABRIEL | NOTIFICATIONS 0 | HELP

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

Setup

Your Profile Information Requests Performance Evaluation

Company Profile

Environmental, Social Governance & Diversity

Risk & Compliance

Financial Performance

Ratings & References

Quick Links

Manage payment information

Manage legal entities

Learning Center

Add more customers

Complete your profile to get discovered by Coupa buyers that are looking for items in your category.

Profile Progress 6%

Last Updated less than a minute ago

Profile preview | Copy profile URL | Download Profile as PDF

REDZONE TELECOMUNICACIONES S.A.S

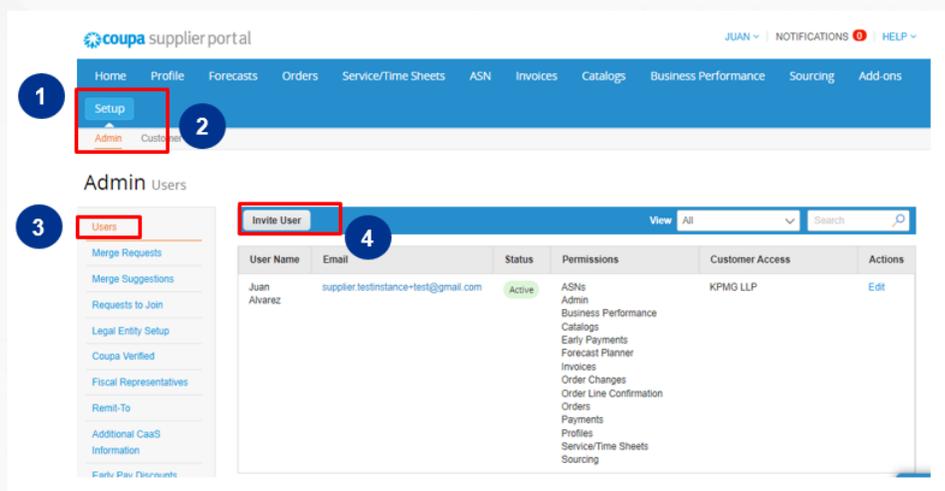
Edit Profile

The supplier will always have the option to go to “edit profile” through the “profile” menu to complete their company information.

INVITATION TO USERS

The supplier may invite users from its company to also be part of the portal, either by resending the initial invitation with the “Resend this invitation” option (see registration process) or from the configuration menu.

1. Select **Setup** at the top of the page.
2. Select **Admin** from the submenu.
3. Select **Users** from the left menu.
4. Select the **Invite User** button on the right side.



By clicking “**Invite User**”, manage the permissions (assign them) and send the invitation. From this menu administrators will be able to assign visibility and access to information.

The screenshot shows the 'Invite User' form with the following elements:

- 1**: A blue circle pointing to the 'Permissions' section.
- 2**: A blue circle pointing to the 'First Name', 'Last Name', and 'Email' input fields.
- 3**: A blue circle pointing to the 'Customers' section.
- 4**: A blue circle pointing to the 'Send Invitation' button.

The form includes a 'Cancel' button and a 'Send Invitation' button at the bottom right.

1. Permissions allow you to restrict the visibility that the user who is being invited will have.
2. Here you can enter the information of the user you want to invite.
3. You can also restrict which clients the new user will have visibility for.
4. To finish, select **Send Invitation**

Acción necesaria para el proveedor International Test Supplier: haga clic a continuación para unirse a Coupa

Coupa Supplier Portal <do_not_reply@supplier-test.coupa-host.com>
to suppliers.coupa-ktsaintl

Acción necesaria para el proveedor International Test Supplier: haga clic a continuación para unirse a Coupa

Hola, Alex Riggs:

Un colega lo invitó a unirse a su cuenta en Coupa. Una vez que se registre, puede ver y administrar las órdenes de compra, crear y administrar facturas, obtener alertas en tiempo real por SMS para estas transacciones, y mucho más al trabajar con organizaciones de compra que usan Coupa.

El Coupa Supplier Portal es completamente gratis y lo ayuda a realizar transacciones y comunicarse electrónicamente de mejor manera. Obtenga más información usando los enlaces siguientes, o utilice el botón para registrarse. ¡Bienvenido!

[Unirse a Coupa](#)

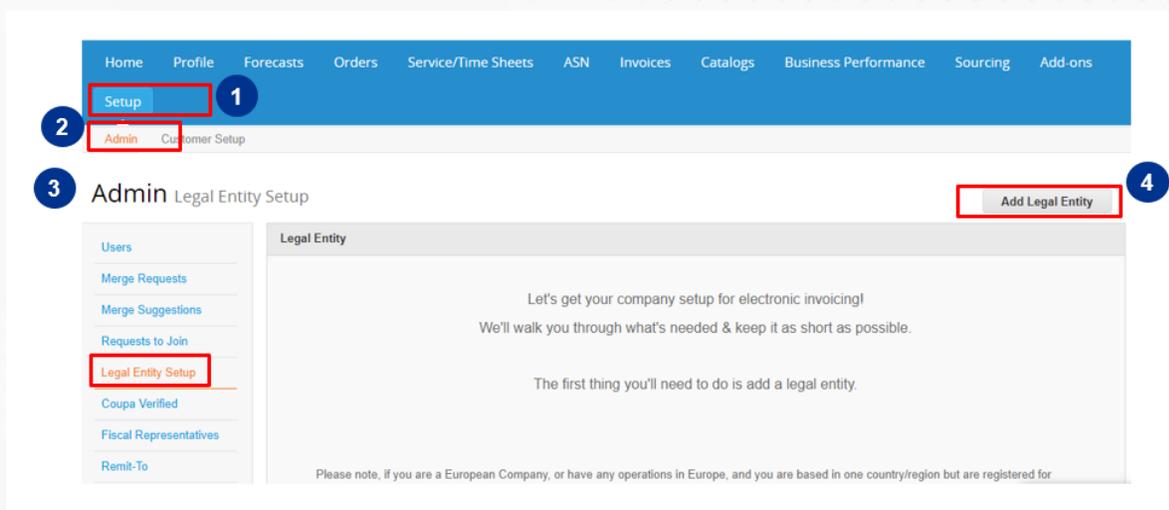


Administración de gastos comerciales

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

ADD LEGAL ENTITY

For the supplier to **create invoices** in the CSP, it is necessary to add its legal entity. The following process must be conducted only by the supplier's **administrator user / main contact**:



1. Select **Setup** at the top of the page.

2. Select **Admin** from the submenu.
3. Select **Legal Entity Setup** from the left menu.
4. Select the **Add Legal Entity button** on the right side.

You must complete the requested information:

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

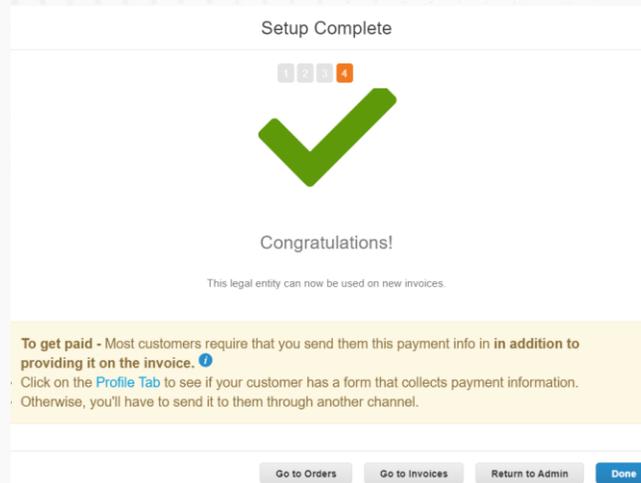
This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel Continue

NOTE: Suppliers based in Mexico must also select their **Tax Regime**.

During the configuration of the legal entity, if you select Mexico in the tax data (taxes) section, you will need to provide your VAT ID, that is, your **RFC**.

As part of creating the legal entity, you will need to provide the invoice origin address details, as well as the Remit-to address and any other related addresses. When finished, click "Done":



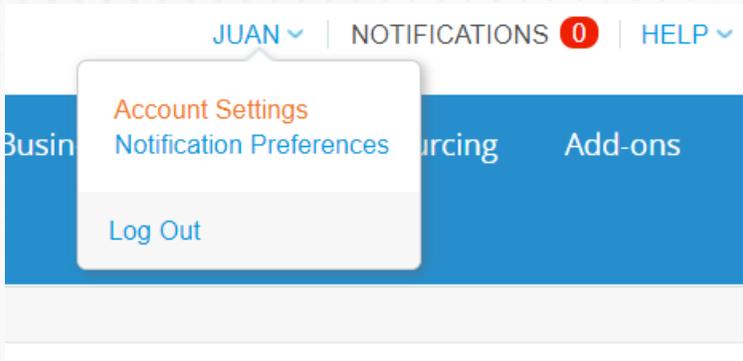
Once all the requested information has been completed, Coupa will show that the Legal entity was successfully added.

Legal Entity				
International Test Supplier				Actions ▾
Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
345 Broadway street San Antonio TX 75201 United States	Address 1 customer Remit-To Address 345 Broadway street San Antonio TX 75201 United States Active	345 Broadway street San Antonio TX 75201 United States		KPMG LLP

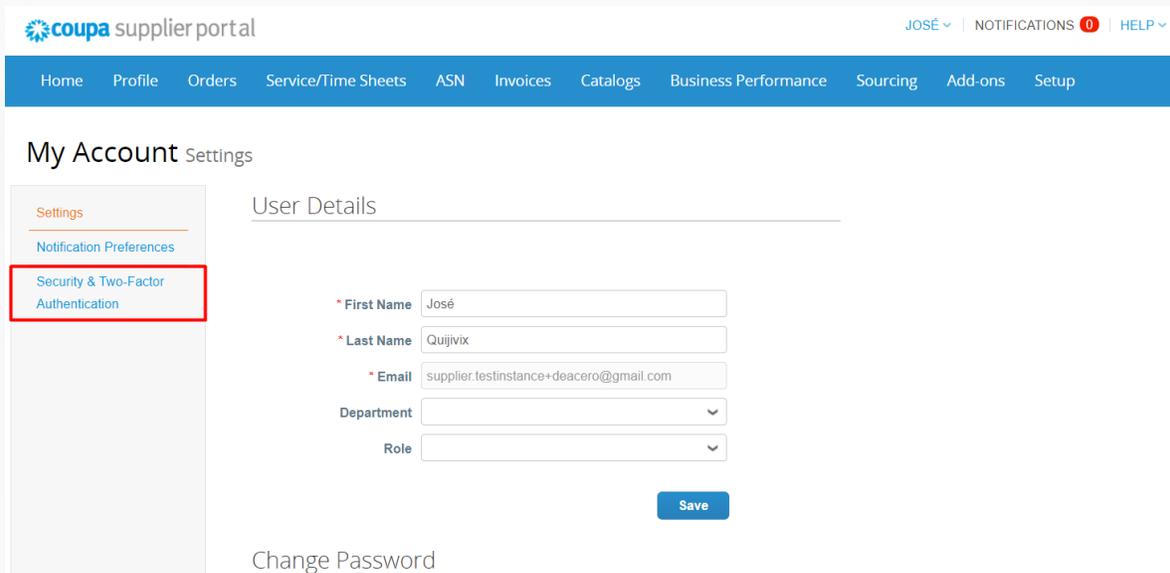
If the supplier requires adding more than one legal entity, they must repeat the same steps for each legal entity they wish to add.

ADD DUAL AUTHENTICATION

To further protect your information CSP has two-factor authentication, the following process must be performed only by the supplier's **administrator user / primary contact:**



1. Click on the arrow next to the contact's name and then on **“Account Settings”**



2. In the new window that opens, click on **“Security and two-factor authentication”**

Two Factor Authentication App [X]

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.

- 1 Use your favorite Authenticator App available from your mobile phone app store: Examples are "Google Authenticator" and "Authy"
- 2 Scan this QR code using authenticator app
- 3 Enter the 6-digit validation code - open your mobile device's Authenticator app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code




Coupa Supplier Portal



Código QR

4U2EFQVHCORNU6N6FN
QZUKFBO624TSWJ

Click to copy Security Key

3. From the authentication application (On your mobile device) of your choice (For example "Authenticator") scan the QR code and enter the 6 verification digits

Two Factor Authentication App
✕

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.

- 1 Use your favorite Authenticator App available from your mobile phone app store: Examples are "Google Authenticator" and "Authy"
- 2 Scan this QR code using authenticator app
- 3 Enter the 6-digit validation code - open your mobile device's Authenticator app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code

919375

Download on the App Store

GET IT ON Google Play

Coupa Supplier Portal



4U2EFQVHCORNU6N6FN
QZUKFBO624TSWJ

Click to copy Security Key

Cancel
Enable

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

Save Your Backup Codes
✕

Backup codes are the only way to restore access if you lose access to your authenticating phone or app.

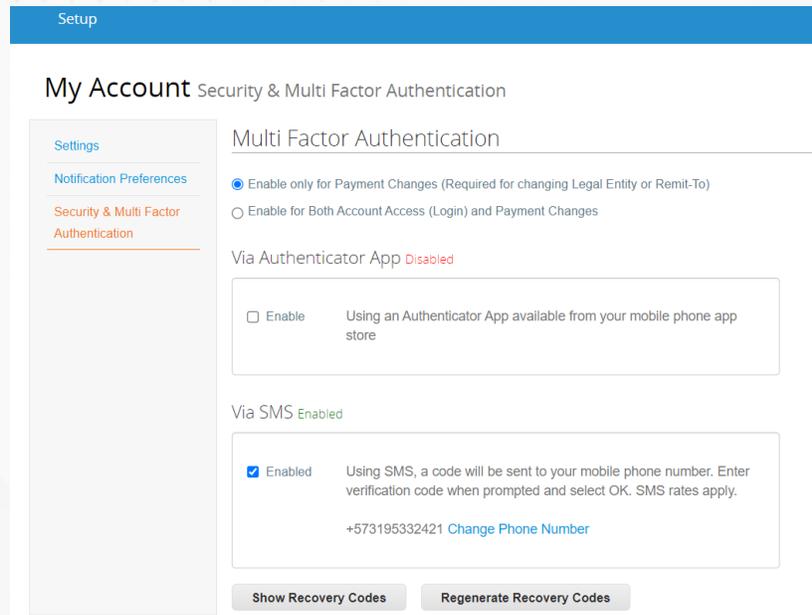
Keep these somewhere safe but accessible

A360Cg	54tkoA
VpEaJw	ySG36Q
eWRrjw	2We_Tg

You can only use each backup code once.
These codes were generated on June 14, 2023

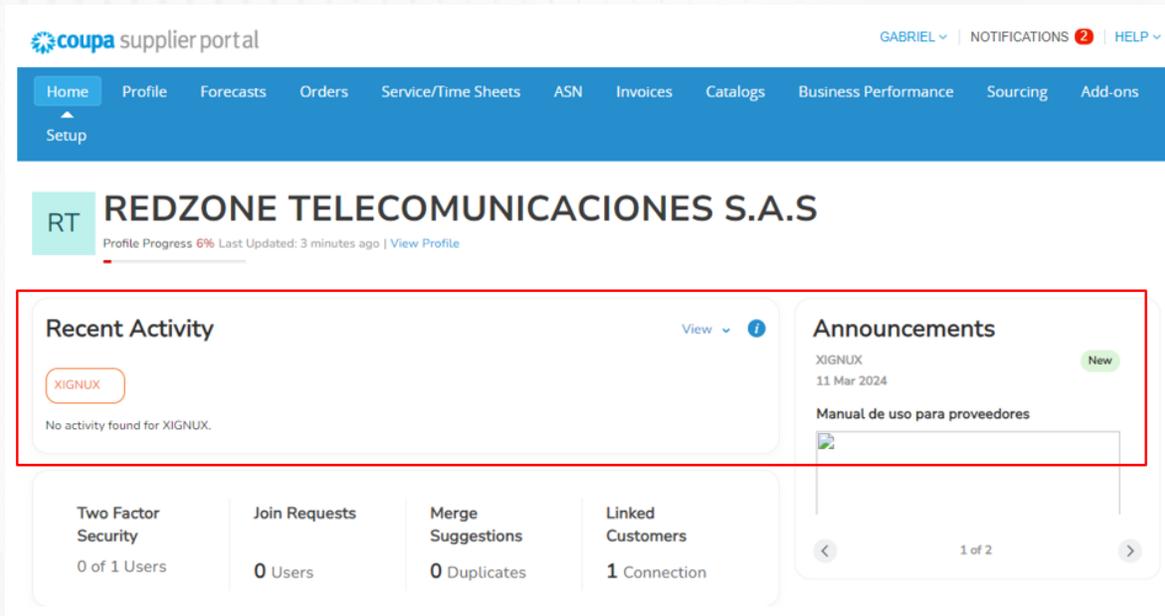
Download
Print

- When you finish configuring two-step authentication, the configuration screen will open in which you can choose in which cases to activate authentication (payment or login changes), if you want to change the authentication application, if you want enable SMS authentication (with additional SMS fees) or if you want to display or regenerate recovery codes.

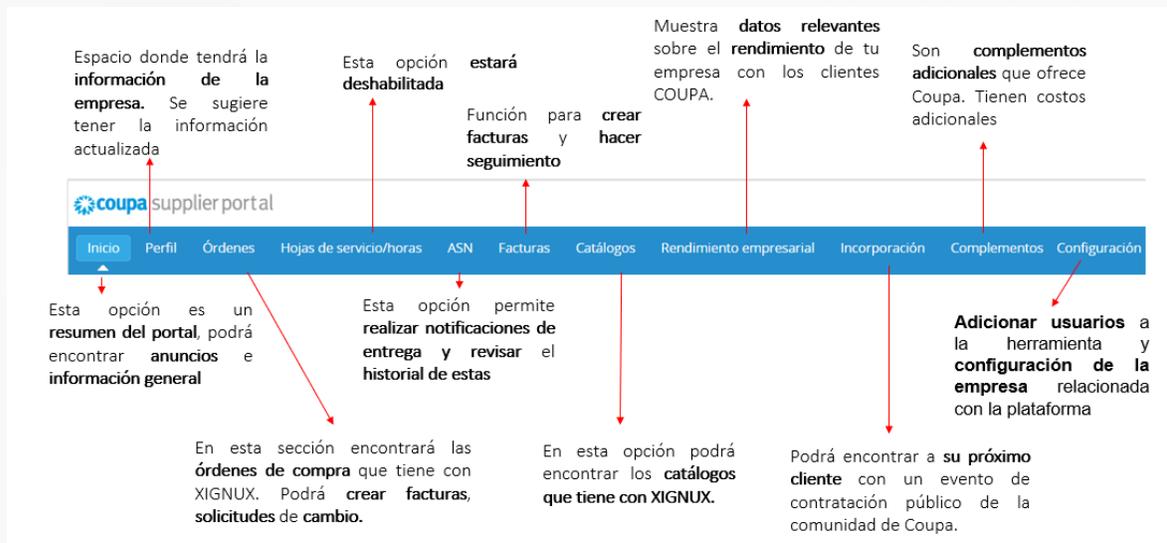


HOME PAGE COUPA SUPPLIER PORTAL

Upon entering the portal, the supplier will have different options: go to the specific objects they want to consult such as orders, invoices, notifications or improve their profile. You will find the **Recent Activity** section, where you can view recent orders and invoices. And the **Announcements** section where you can view communications from clients:



Below is a description of the options for your navigation guide:

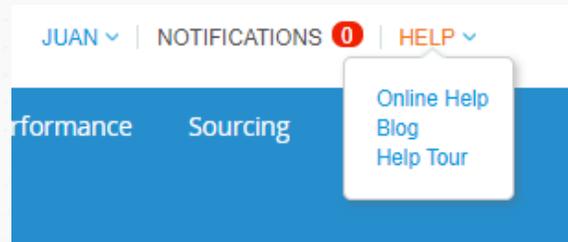


NAVIGATE, GET HELP AND LANGUAGE

The interface is quite easy to navigate. In the upper right part, you can find the **notifications** you receive about activities requested by your clients and news.

You will also find the online help menu; in case you have questions regarding portal management.

In the upper right corner of the page, click the Help link to access **online Help** or view the help tour at any time.

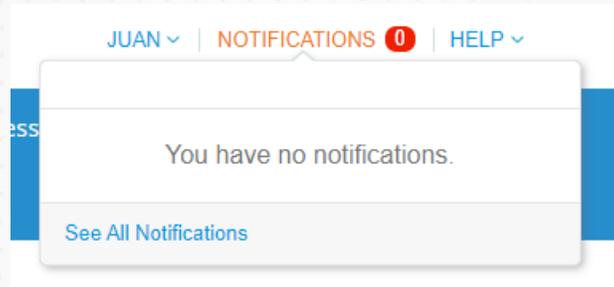


Coupa Supplier Portal is a platform available in multiple languages, so you can always change the language by going to the bottom of the page. For the Spanish language, it is recommended to choose the “Spanish (Mexico)” option.

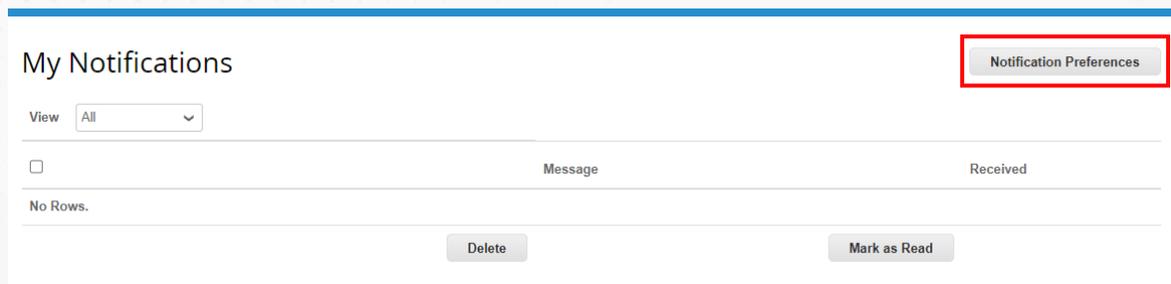


VIEW AND MANAGE NOTIFICATIONS

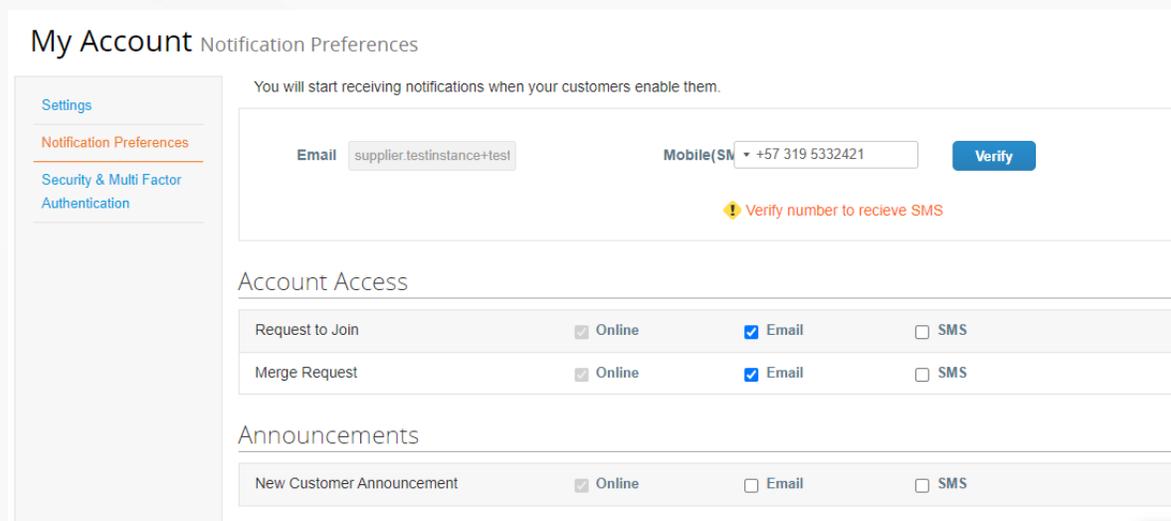
Hover over the Notifications link to view unread system notifications. Only the three most recent notifications will be displayed, to view all notifications in detail and manage them, click the **Notifications** or **View all notifications links**:



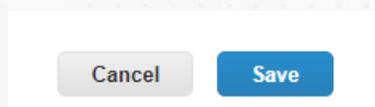
To configure your notifications, select **Notification Preferences**.



On the **My Account Notification Preferences page**, all notifications will appear that can be disabled or enabled as Platform (online), email or SMS notifications.



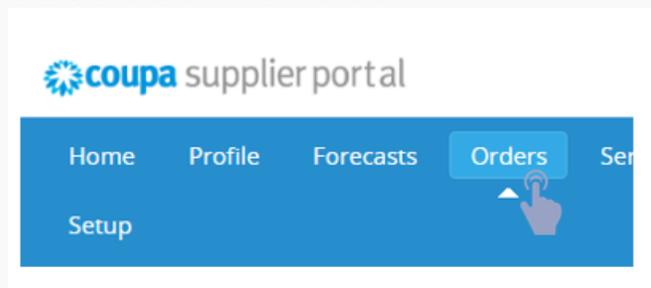
When finished, select the **Save button** at the bottom of the page.



VIEW AND MANAGE PURCHASE ORDERS

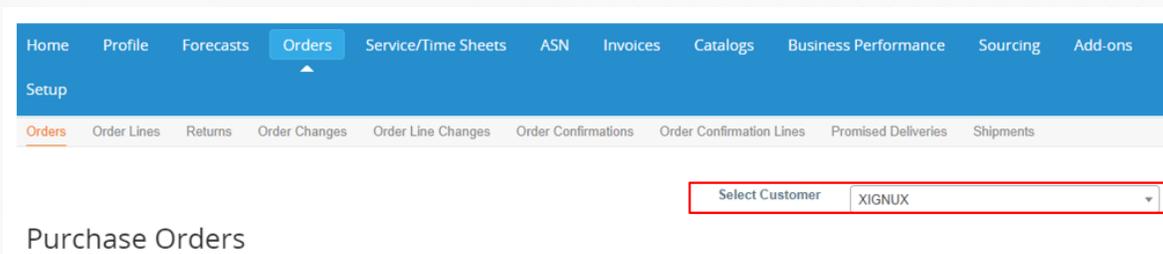
In the main menu, click the **Orders** tab. The Orders page appears with the **Purchase Orders** table.

In this section, the supplier will have complete visibility over the purchase orders that their client has issued to them.



The CSP supplier portal is a single portal where you will find the information of all your clients who have Coupa; This to facilitate your purchasing management with all your clients.

1. To view the information of each business object with a specific client, simply go to “select client” and choose the one you want to consult in the “Select Client” drop-down list located in the upper right corner:



These are the sections that you will find in the “orders” option menu:

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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
120	04/17/24	Issued	04/17/24	5 Unidad of Entrenador COUPA	No	16,300.00 MXN		

1. Clicking on the Purchase Order number will take you to its details.
2. **ACTIONS**” section, the supplier will be able to:
 - a. Invoice directly on the yellow coins’ icon.
 - b. Create Credit Notes on the purchase order in the brown coin icon
(Do not perform this action from the CSP, if you want to apply a credit note to CMI, you must contact your Purchasing contact)
3. While inside the Purchase Order, select the **“Acknowledged”** option to let your client know that you have seen the Purchase Order and are working on it.

Purchase Order #120

General Info

Status Issued - Sent via Email

Order Date 04/17/24

Revision Date 04/17/24

Requester Usuario Solicitante

Email test.instance.supplier+usersol@gmail.com

Payment Term 30D

Attachments None

Acknowledged

Assigned to

Within each purchase order the supplier will find different options:

Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Qty	Unit	Price	Total	Invoiced
	Entrenador COUPA	5	Unidad	3,260.00	16,300.00	0.00

Service Start Date	Due Date	Resource Manager	Service Manager Email	Confirmed	Pending Approval	Pending Rework
04/15/24	04/23/24	Usuario Solicitante	ejemplo@gmail.com	3	2	0

Can see the print view

Create invoice directly

Create Service / Time Sheets

Total MXN **16,300.00**

Create Invoice Create Service/Time Sheets Save Print View

Comments Mute Comments

Enter Comment

Add File | URL

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

Add Comment

Add comments (XIGNUX will receive your mensaje).

If you have any comments on your orders, please write in the comments box and the purchasing user who submitted your order will be automatically notified.

Purchase Order Design

This will be the purchase order image that the supplier will receive from XIGNUX.



XIGNUX
PURCHASE ORDER

PARAMETA SAS

FLORESTA DE LA SABANA NO.237, CR 7
BOGOTA, BTA 110151
Colombia
Attn: LORENA LOZANO GONZALEZ
supplier.testinstance+parameta@gmail.com
Phone: +81 8040 6614
Fax: +81 8040 6606

PO NUMBER 120
DATE 04/17/24
PAYMENT TERMS 30D
SHIPPING TERMS EXC - Entrega en corporativo
CURRENCY MXN
CONTRACT
CONTACT Usuario Solicitante
test.instance.supplier+usersol@gmail.com

Ship To

XIGNUX
Ave. Arq. Pedro Ramirez
Vazquez 200 Col. Parque
corporativo Ucaly
Oficinas Corporativo
San pedro garza garcia, NLE
66278
Mexico
Attn: Usuario Solicitante

Bill To

XIGNUX
Ave. Arq. Pedro Ramirez
Vazquez 200 Col. Parque
corporativo Ucaly
SAN PEDRO GARZA
GARCIA, NUEVO LEON
66278
Mexico
Attn:

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Entrenador COUPA	04/23/24	5	Unidad	3,260.00	16,300.00
						16,300.00 MXN

Nota:

OC colocada bajo los términos y condiciones de Xignux Corporativo. Su material será inspeccionado al recibirse. PO placed under the terms and conditions of Xignux Corporativo: www.xignux.com/proveedores

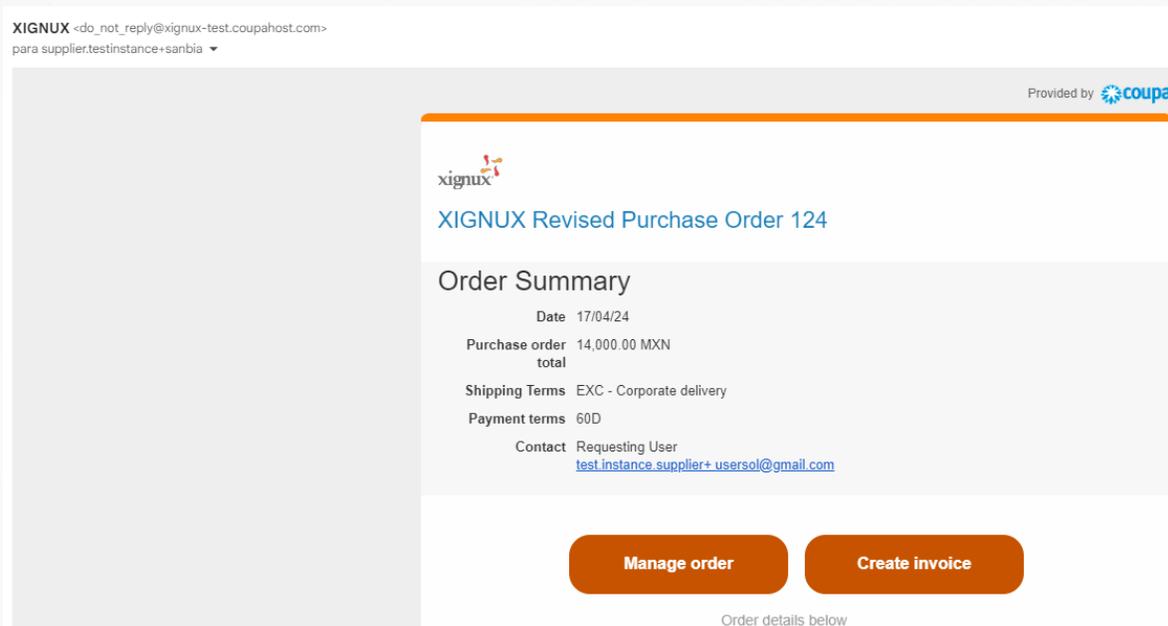
Purchase Order Statuses

State	Description
Suspension of the buyer	The purchase order is approved, but the buyer must review it.
Canceled	The purchase order has been canceled and does not need to be processed.
Closed	The purchase order issued was received and closed in Coupa, either manually or automatically.
Suspension of the currency	The purchase order is on hold due to a currency exchange rate problem.

Error	Something is wrong with the purchase order. Contact your customer to get the purchase order operational again.
Issued	The purchase order was approved and shipped.
Temporarily closed	The purchase order is closed but can be reopened. You cannot generate an invoice from a purchase order in this state.

Purchase Order Change Notifications

If the buyer makes any changes to the purchase order, the supplier will be immediately notified by email. The email will indicate that the purchase order has been **reviewed**.



The screenshot shows an email notification from XIGNUX. The header includes the sender's email address and the recipient's name. The main content area features the XIGNUX logo and the subject line "XIGNUX Revised Purchase Order 124". Below this is an "Order Summary" section with the following details:

- Date: 17/04/24
- Purchase order total: 14,000.00 MXN
- Shipping Terms: EXC - Corporate delivery
- Payment terms: 60D
- Contact: Requesting User, test.instance.supplier+usersol@gmail.com

At the bottom of the summary, there are two orange buttons: "Manage order" and "Create invoice". Below the buttons, it says "Order details below".

In the email received, the supplier will be able to see all the order information and will have some actions available:

- **Email Notification**
- **Action buttons from email.**

The change that has been made will be highlighted from the graphical interface like this:

Shipping Address

XIGNUX
Ave. Arq. Pedro Ramirez
Vazquez 200 Col. Ucaly
Corporate Park
Corporate Workshops
San pedro garza garcia, NLE
66278
Mexico
To the attention of: User
Applicant

Billing Address

XIGNUX
Ave. Arq. Pedro Ramirez
Vazquez 200 Col. Ucaly
Corporate Park
SAN PEDRO GARZA
GARCIA, NUEVO LEON
66278
Mexico
For the attention of:

test_instance_supplier-usersol@gmail.com

Current lines

Line	Description	Reception deadline	Amount	Unit	Price	Total
1	CAFE LP GRANO REGULAR B 500G C/16	22/04/24	50	Unit	280.00	14,000.00
						42,600.00 MXN 14,000.00 MXN

Modified lines

Line	Description	Reception deadline	Amount	Unit	Price	Total
1	CAFE LP GRANO REGULAR B 500G C/16	22/04/24	45 50	Unit	280.00	42,600.00 14,000.00

Create Service / Time Sheets

The Service/time sheet is the way we can record the execution of the service and can be done through two steps:

1. Through the icon in the order table:

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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
120	04/17/24	Issued	None	5 Unidad of Entrenador COUPA	No	16,300.00 MXN		
103	04/05/24	Issued	None	6 Unidad of Consultor COUPA	No	291,240.00 M		Create Service/Time Sheets

2. On the button when entering the purchase order:



Then, complete the following information:

1. The amount of service delivered;
2. The date on which the performance of the service was completed;
3. The supports required to confirm the performance of the service;
4. To finish, click **submit**.

Service/Time Sheets #54

PO 120

Services

1	Submission Type New	PO Line # 1	Item Entrenador COUPA	1 *Quantity 2	Unit Of Measure Unidad
	Due Date 04/23/24		2 Actual Completion mm/dd/yy	Attachments Add File URL Text	
	Tipo de Seguimiento Por avances realizados		Otros Tipo de Seguimiento None	Tipo de Soporte Fotografías	3 *Soportes Seleccionar archivo Ningún archivo selec.
	Otros Tipo de Soporte None				

Total 6,520.00 MXN

Cancel Save as Draft **4** Submit

From the Service Sheets/Hours menu you can check the status of the sheets created:

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

Setup

Service/Time Sheets Service/Time Sheets Lines

Select Customer XIGNUX

Service/Time Sheets [Switch to new experience](#)

Load from file Export to View All Advanced Search

Service/Time Sheets	Purchase Order	Status	Submitted At	Approved At	Created By	Assigned To	Actions
54	120	Pending Approval	04/25/24	None	LORENA LOZANO		

CREATE AND MANAGE INVOICES

Invoice Creation

The CSP offers several options to start creating the invoice. These are:

- In the **Orders** table you will find the yellow coins icon , which will allow you to create an invoice from said PO, also bringing the order data to the invoice you are going to create.
- When entering a Purchase Order, after the detail and total of the order, you will find the Create invoice button.
- In the **Invoices** table you will find the “Create invoices from PO” button, which will take you to the Orders table so you can start the creation with one of the options already mentioned.

Invoices

Instructions From Customer

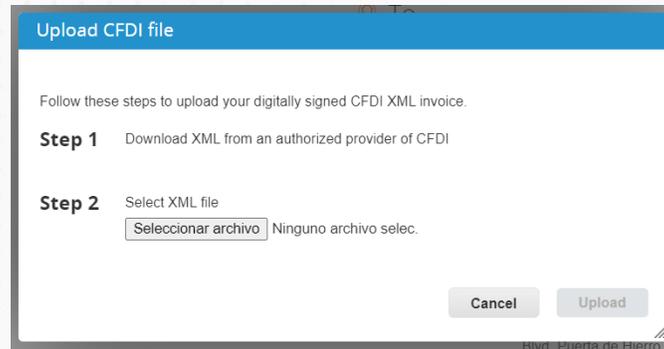
Create Invoices 

[Create Invoice from PO](#)
[Create Invoice from Contract](#)
[Create Blank Invoice](#)
[Create Credit Note](#)

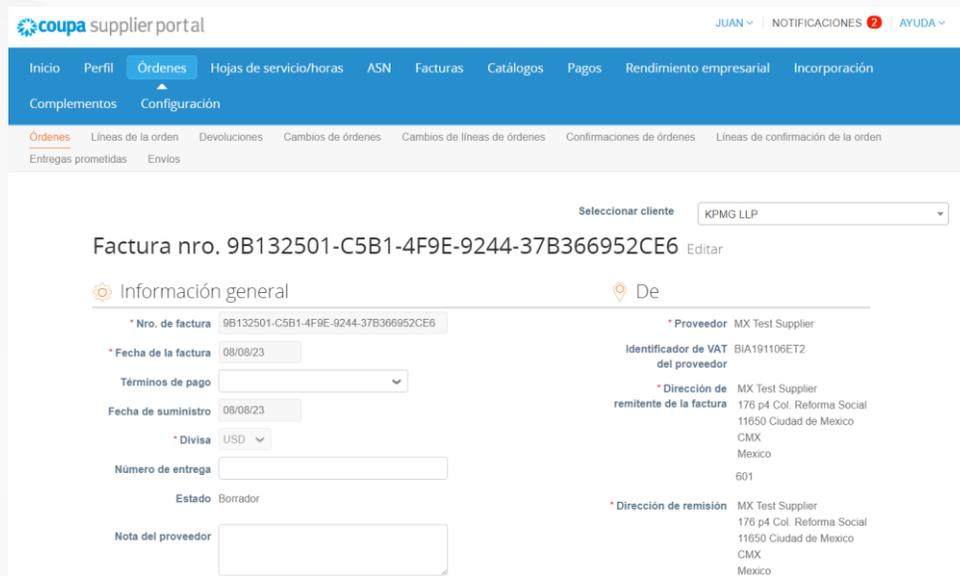
Mexican Suppliers

It is necessary to create at least one legal entity with a Remit-To address in Mexico, with the corresponding tax regime and RFC. To see the step by step of how to create the legal entity, refer to the [Add Legal Entity section](#).

When you start invoice creation, the portal will ask you to upload the CFDI XML file of the invoice you want to register.



When uploading the XML, Coupa will validate it and take the data to create the corresponding invoice in the portal. To guarantee that the invoice remains in compliance based on Mexican regulations, the invoice data cannot be modified.



You must validate the invoice record created and complete the corresponding data/files.

- Attach the PDF of the invoice in **Attachments**
- Associate the Purchase Order line(s) to the Invoice line(s)

☰ Líneas

Tipo	Descripción	Cant.	Unidades de medida	Precio
	CAFE LP GRANO REGULAR B 500G C/16	10	Cada uno	202.00
2,020.00				

Importe de descuento	Unidad de medida de la empresa	Cuenta de impuesto sobre el patrimonio	Número de la declaración de aduana
<input type="text"/>	UN	<input type="text"/>	<input type="text"/>
UNSPSC	Línea de orden de compra	Línea de hoja de servicio/tiempo	Contrato
50201706	Ninguno/a Borrar	Ninguno/a	<input type="text"/>
Número de parte del proveedor			
7501023351221			
Impuestos			

Once you include the PDF and associate the Purchase Order with each line, you can send the invoice.

Foreign Suppliers

Once at least one legal entity has been created, you can proceed with the creation of the invoice. To see the step by step of how to create the legal entity, refer to the [Add Legal Entity section](#).

When you start creating the invoice, Coupa will bring the purchase order data to the invoice creation screen, to make it easier for you to create it. In this way you will only have to complete the invoice data, such as invoice number, creation date, among others.

Create Invoice Create

General Info

* Invoice # ✓

Invoice Date Set automatically at time of submission

Payment Term Z000

* Currency

Status Draft

Image Scan Ninguno archivo selec.

Supplier Note

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

If necessary, you can adjust data that comes from the purchase order, such as quantity, amount, etc. The invoice line(s) will already be related to the corresponding Purchase Order line(s).

Type	Description	Qty	UOM	Price	
	Banners Publicitarios	<input type="text" value="20"/>	Unidad-Mexic	<input type="text" value="41.30"/>	826.00 ✖
PO Line	Service/Time Sheet Line	Contract		Credit Line	
POC001759-1 Clear	None	<input type="text"/>		None Clear	
Supplier Part Number	Serial Number	Asset Tag			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
Billing					
1-8212-821Q-28272362_8212--65010204					

Please note that there is no need to enter tax-related data, this will be managed by the KTSA Accounts Payable team. Once you have entered all the relevant data and attached the PDF of the invoice, you can send the invoice.

Sending Credit Notes

The CSP allows you to create Credit Notes associated with an invoice (previously created in Coupa). To do this, in the Invoices section you will find the **Create Credit Note** button. Credit notes may be total or partial.

When creating a credit memo, the first thing is to define if it is being created to solve an invoice problem and, in that case, select the invoice or if it is being created for another reason, such as a rebate, for example.

When choosing the invoice, you will have to indicate if the credit note is to cancel the entire invoice or if you want to adjust it. In that case you can adjust quantity, price, or both on each line.

You must attach the corresponding supporting documentation and then you can send the credit note.

NOTE: Mexican suppliers will be able to upload the XML of the corresponding CFDI and the system will validate it and create the corresponding Credit Note. In this case the value of the credit note will be positive, and you will only have to attach the PDF of the credit note to proceed to send it.

Invoice Statuses

With the CSP you can manage and track all invoices and credit notes. In the Invoices table you can see the status of each one.

Create Invoices ⓘ

[Create Invoice from PO](#)
[Create Invoice from Contract](#)
[Create Blank Invoice](#)
[Create Credit Note](#)

Export to: [v] View: All [v] Search: [input type="text"]

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
bd6fe706-a6e5-4d21-93c9-216cff74537c	11/08/23	Approved	POC001763	1,049.16 MXN	No		
9B132501-C5B1-4F9E-9244-37B366952CE6	10/30/23	Approved	POC001723	28,797.00 USD	No		
None	10/30/23	Draft	POC001705	1,500.00 USD	No		[edit] [delete]

Below are the main statuses that you can find.

Status	Description
Abandoned	The “disputed” invoice has been abandoned.
Approved	The customer has accepted and will pay the invoice.
Disputed	The invoice was disputed, and a reason was provided.
Draft	The invoice was created but has not been sent to the customer.
Pending Approval	The customer is reviewing the invoice.
Processing	AP is processing the invoice.
Voided	The invoice was cancelled.

Please note that you will only be able to edit invoices that are in “Draft” status.

Inconsistency Management

If an invoice is in the **Disputed** status, you will be able to see the reason it was disputed.

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute Reason
Demo1	2023-11-08	Approved	POC001707	2,500.00 USD	No	
P5452	2023-10-26	Disputed	POC001707	1,500.00 USD	Yes	Duplicate Invoice. Already paid or payment review in progress.

In that case, you can take the following actions:

- **Void**: For example, if the invoice is duplicate or has already been paid, you can void it.
- **Correct invoice**: in case the invoice has any incorrect information, with this you can make the necessary corrections.

NOTE: Please note that if you are working with compliant invoices (Mexico suppliers), the only option will be to cancel the invoice and issue a new one with the corresponding corrections.

Within the invoice you will be able to see the reason the invoice was disputed, as well as any additional comments provided by the customer.

General Info

Invoice # P5452

Invoice Date 2023-10-26

Payment Term Z000

Currency USD

Status Disputed

Dispute Reason(s) Duplicate Invoice. Already paid or payment review in progress.

If you or AP have included any additional comments, it will be reflected in the **Comments** section at the bottom of the screen.

Participants: Jenny Vargas

to supplier

Jenny Vargas

Demo. Esta orden ya fue facturada.

disputed on 2023-12-07 at 2:21 PM

Payments

When the client pays the invoice, you can receive a notification by email and see the payment details in the portal.

Export to ▾		View Payment Information ▾		Search			
Paid	PO #	Invoice #	Status ▾	Invoice Date	Payment Term	Date Of Supply	Payment Information
Yes	POC001707	Demo1	Approved	2023-11-08	Z000	2023-11-08	Payment# - on 2023-12-04 for USD 2,500.00

By entering the invoice and going to the **Payments** section, you will find the payment details provided by the customer. For example, the amount and date on which the payment was made.

☰ Payments

Status Fully Paid

Paid-In-Full Date 2023-12-08

Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted	2023-12-04	Payment		2,500.00
Total Reconciled				2,500.00
Invoice Total				2,500.00
Remaining Balance				0.00

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

Mexican Suppliers

To send the payment receipt, you will need to attach the corresponding XML, in the **Payment Receipts** section.

coupa supplier portal JUAN NOTIFICATIONS 13

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogs Payments

Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines **Payment Receipts**

Select Customer KPMG LLP

Payment Receipts

Upload Receipt Export to View All Advanced Search

Just as for invoices and credit notes, Coupa will validate and read the XML bringing the data to the portal. In this case, the payment receipt will be created with the corresponding details, including the invoice to which the payment corresponds.

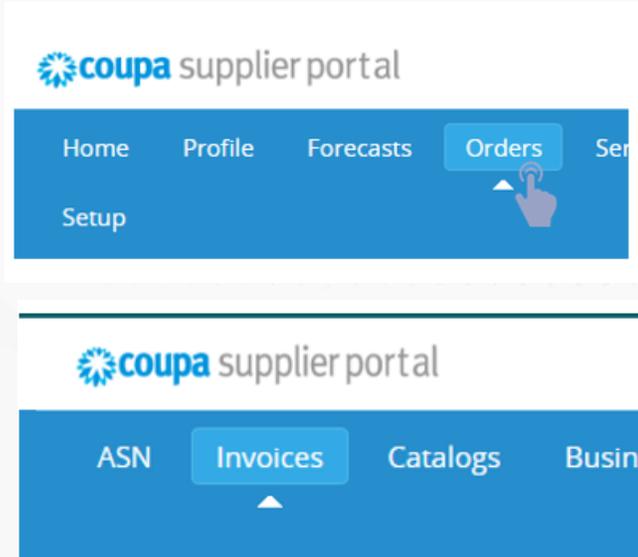
Receipt #Number	Date	Payment Received Date	Currency	Amount	Invoice #Number(s)	Supplier Tax ID Number	Buyer Tax ID Number
0a354d38-f9e3-4749-aa12-	09/14/23	09/07/23	MXN	1,049.16	bd6fe706-a6e5-4d21-93c9-216cff74537c	I8	KT

The payment receipt is immediately available to the customer, who can see it in Coupa.

MANAGEMENT AND HANDLING OF REPORTS

Remember that the portal seeks to give you visibility and facilitate your purchasing management with XIGNUX. In each business object, the supplier will be able to manage their reports, search for information and export the information in bulk if required very easily.

1. By selecting **Orders**, you will be able to access all purchase orders received by Coupa.



2. Select the customer of the orders you want to consult.

Select Customer

3. Filter based on the type of PO you want to view.

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 Invoice from a Purchase Order

Export to	View	Search				
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered	Actions
POC001759	2023-11-07	Issued	None	20 Unidad-Mexico of Banners Publicitarios	No	
POC001707	2023-10-26	Issued	None	5 each of Servicios de mudanza	No	

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	Search				
Invoice #	Created Date	Status	PO #	Total	Unanswered	Actions
17042024	04/17/24	Pending Approval	None	11,368.00 MXN	No	
c522b09c-f1ce-4383-854e-e92f11ac8edf	04/11/24	Approved	None	-59.11 MXN	No	
factura prueba 2603241613	03/26/24	Pending Approval	None	650.96 MXN	No	
factura prueba 2603241603	03/26/24	Pending Approval	None	286,432.30 MXN	No	
3531a979-c45b-49a2-9d8e-8b6fc95143e8	03/26/24	Approved	None	332,261.47 MXN	No	

4. Select **Export to** and choose the format in which you want to export the report, if desired.

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}

Export to

- CSV plain (current columns)
- CSV for Excel (current columns)
- Excel (current columns)

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

- CSV plain (current columns)
- CSV for Excel (current columns)
- Excel (current columns)
- Legal Invoice (zip)

Create custom views

You can create a **Custom View** with which you can consult both your purchase orders in the “Orders” section, and your invoices in the “**Invoices**” section, in addition to being able to export reports.

Follow these steps:

1. In the **View field** select **Create View**.
2. Choose a **name** for the view, select what type of **visibility** you want. You can also select a base view with which you can start building the new view.
3. Select the conditions by which you want to filter the **view**. **Example:**

Filter By: Invoice Date

Filter Clause: This Month

The screenshot illustrates the 'Create View' process in three steps:

- Step 1:** The 'View' dropdown menu is open, showing various view options. The 'Create View' option is highlighted with a red box.
- Step 2:** The 'Visibility' options are shown, with 'Only Me' selected (radio button) and 'Everyone' unselected. The 'Start with view' dropdown is set to 'All'.
- Step 3:** The 'Conditions' section is shown. The 'Match Conditions' dropdown is set to 'Match all conditions'. The 'Filter By' dropdown is set to 'Invoice #', the 'Filter Clause' dropdown is set to 'is', and the 'Filter Text' field is empty.

4. Select the columns you want to include in your report by dragging each data item to the right and delete the ones you do not want to include by dragging them to the left.
5. Select how you want to order your view.
6. Select **Save** to finish.

Columns

Drag columns to the right to select, to the left to unselect and vertically. You can also use your keyboard to modify the selected columns. Use T, Selected Column list. To reorder, use SPACE to grab an item and then I or ESC to cancel the reordering.

Available Columns	Selected Columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Gross Total
Disputed Date	Unanswered Comments
Document Type	Dispute Reason
Invoice Date	Actions
Last Updated Date	
Linked Document	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	

Columns

Drag columns to the right to select, to the left to unselect and vertically. You can also use your keyboard to modify the selected columns. Use T, Selected Column list. To reorder, use SPACE to grab an item and then I or ESC to cancel the reordering.

Available Columns	Selected Columns
Comments	PO Number
Payment Agreements	Order Date
PO ID	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Assigned To
	Actions

Default Sort Order

Sort by in ascending order.

Supplier Information and Support Page

You will be able to find different materials such as photos, videos and manuals with the necessary information about our negotiation processes, as well as supplier registration.

Go to: xignux.com/proveedores

PROVEEDORES XIGNUX
¡BIENVENIDOS!

En este espacio encontrarán diversos recursos que facilitarán su conocimiento sobre nuestro proceso interno de licitaciones a través de la plataforma Coupa. Además, podremos mantenernos en contacto por este medio.

[Conoce más](#)

INDUSTRIAS ACERCA DE INVERSIONISTAS RESPONSABILIDAD SOCIAL MEDIOS

PROCESOS DE COMPRA ALTA PROVEEDOR

Las etapas que se estarán realizando en un **proceso de alta de proveedor** son las siguientes:

- 01** Se solicita dar de alta a un proveedor para la compra de un bien o servicio, registrando datos generales del proveedor en un formulario en Coupa.
- 02** Se autoriza la solicitud de alta de proveedor.
- 03** Se envía un correo invitando al proveedor para que complete información en el formulario.
- 04** Se acepta la invitación, se completa la información requerida en el formulario, y se carga la documentación solicitada.
- 05** Se valida la información y la documentación registrada por el proveedor, y se autoriza el alta.

Responsable Xignux Responsables Coupa Responsables Proveedor

If you have any questions or comments, please contact your buyer.