RFS

NSW GOVERNMENT

Coupa Supplier Portal (CSP)

Supplier User Guide

How to Navigate the Portal (CSP)

SIM – Coupa Homepage

RFS

Once you have successfully signed in, you will be taken to the Coupa Homepage.
This section will explain the functions available in the portal.

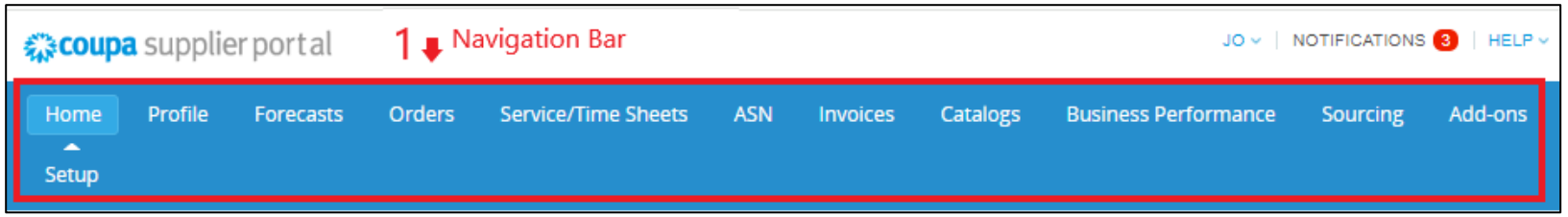
On the homepage you will see the key buttons :-

1. **Navigation Bar** – which includes Home, Profile, Orders, Invoices, Catalog & Setup
2. **My Account** – Manage the platform & change passwords to your CSP account
3. **Notifications** – confirm your preferences for receiving
4. **Help** – Online Help Menu Button with Coupa standard videos and training modules.

SIM – Coupa Homepage Navigation bar

RFS

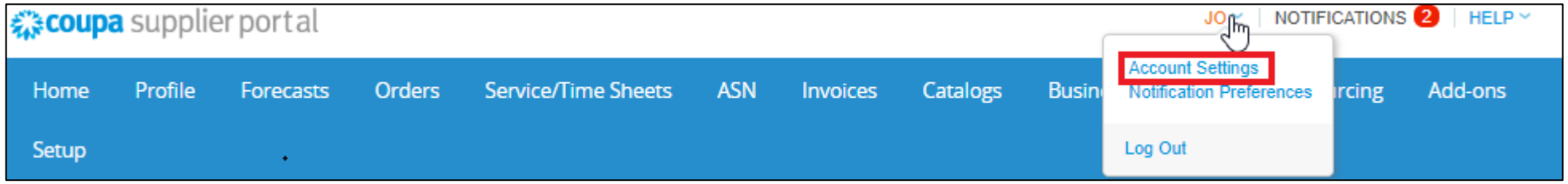
On the homepage at the top you will find the menu for the options available within the portal. Below are the functions you can perform from the blue Navigation bar – some functions are not supported for RFS and greyed out in the below list.



- **Home** – Manage your public profile for transacting with other customers on Coupa
- **Profile** – Manage your profile on the Coupa Portal
- Forecasts – not supported for RFS
- **Orders** – Manage purchase orders
- Service/Time Sheets – not supported for RFS
- ASN – not supported for RFS
- **Invoices** – View all invoices created and current status.
- **Catalogues** – for creation and management of catalogues please contact procurement@rfs.nsw.gov.au if you would like to manage your catalogue through CSP.
- **Business Performance** – gives you insights into your transactions with RFS
- **Sourcing** –
- Add-ons – not supported for RFS
- **Setup**
  - **User Information** – invite add, edit or remove users
  - **Merge Requests** – merge or unmerge other accounts

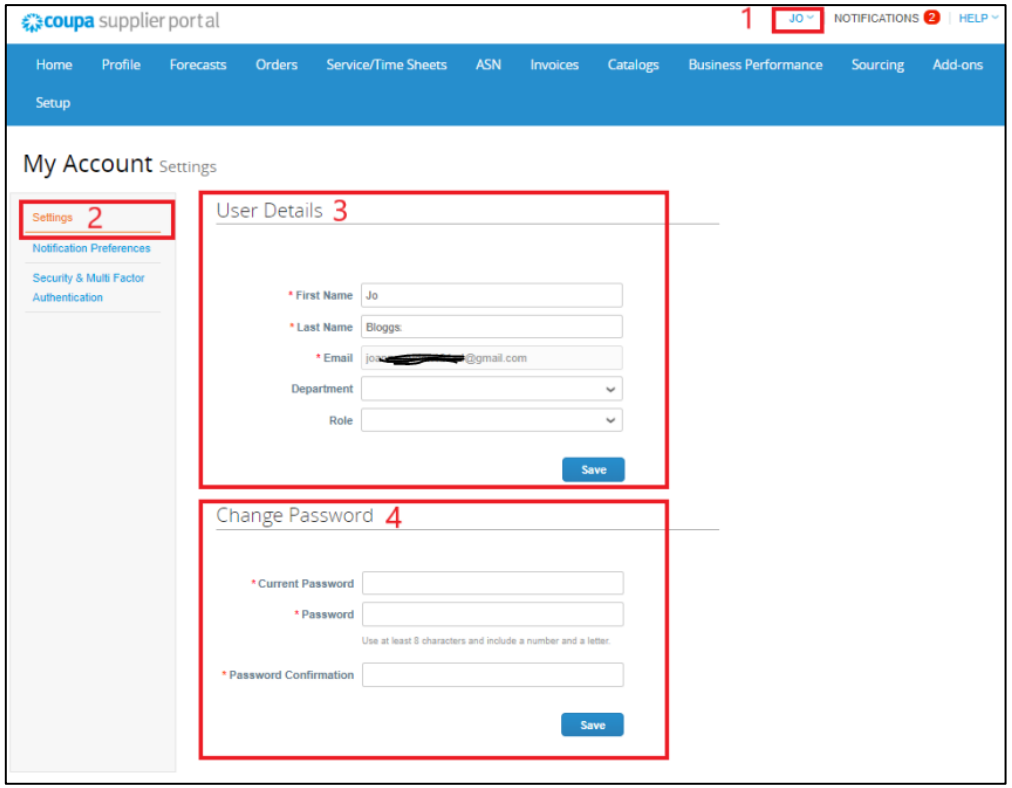
SIM – My Account > Account Settings

My Account > Account settings – here you can manage details and your password



Under **My Account > Account Setting** you can manage your user details and change password.

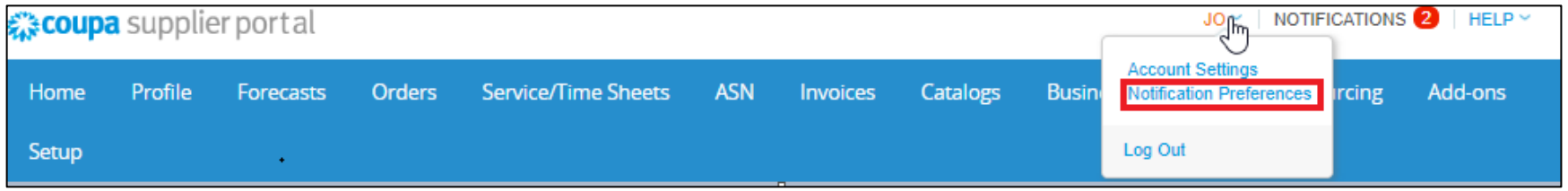
1. **My Account (listed with a name)** click on the arrow then
2. **Settings –** click on settings
3. **User Details** –check info is correct and update if needed, you can also add in your department and role once entered click save
4. **Change Password** – option to change your password if needed then click save



SIM – My Account >Notification Preferences

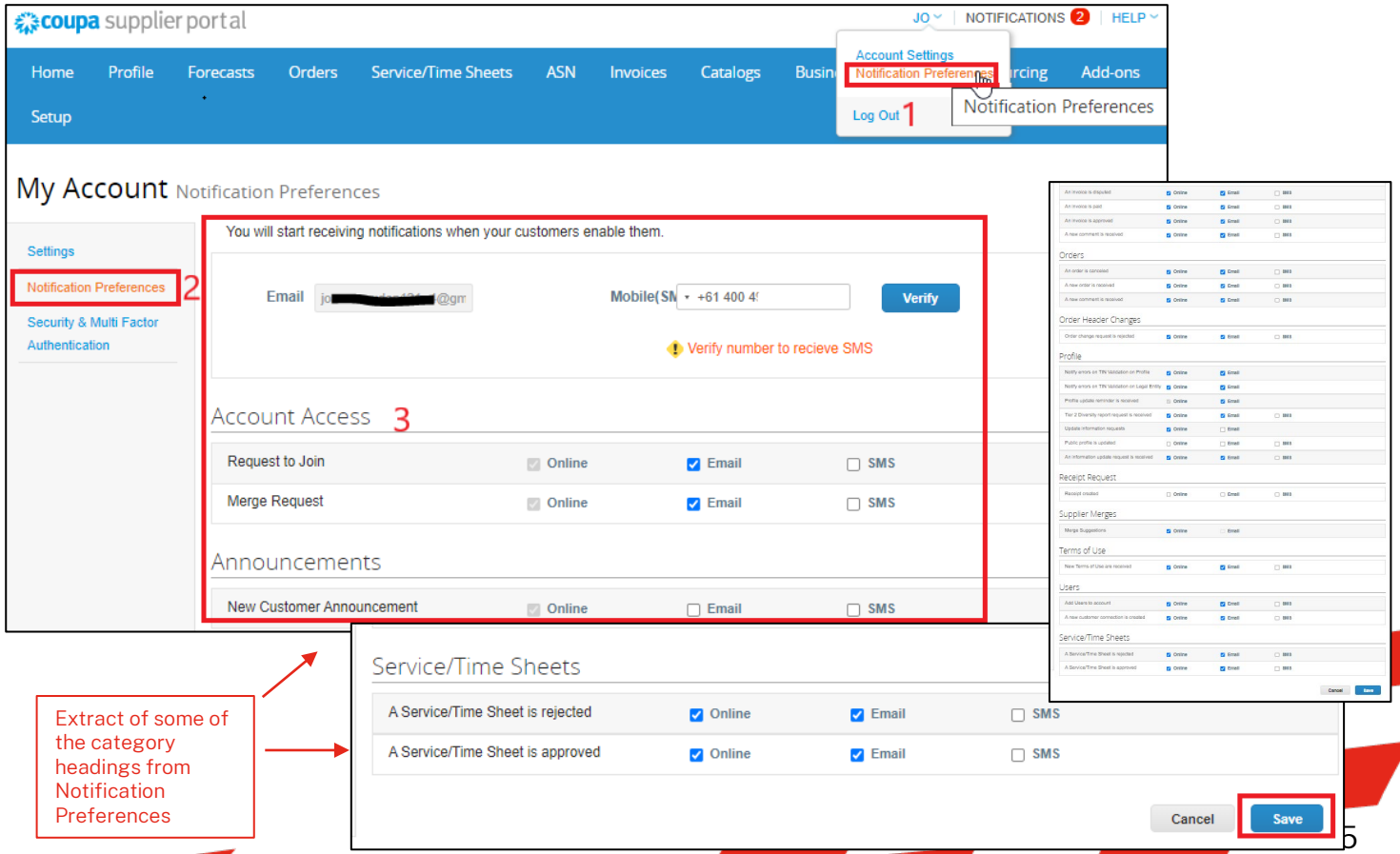
RFS

My Account > Notification Preferences – here you can enable or disable your notifications



Under **My Account > Notification Preferences** you can manage the way you receive notifications by enabling or disabling

1. **My Account** - Click on the down arrow next to **My Account** then click
2. **Notification Preferences** this screen will display all the notification selections that you have as a supplier, you can configure it to suit your needs.
3. **Heading** - Under each category heading tick the box next to the notification type you want to receive **Online** (to do list), **Email or SMS**. Once done click **Save.** Greyed out fields can't be changed.

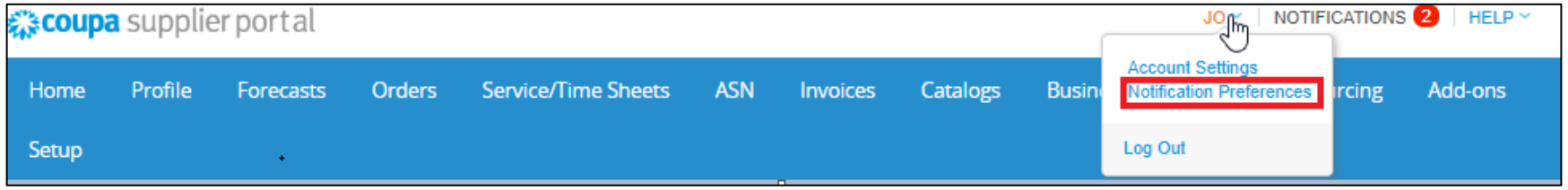


Extract of some of the category headings from Notification Preferences

SIM – My Account >Security & Mutli Factor Authentication

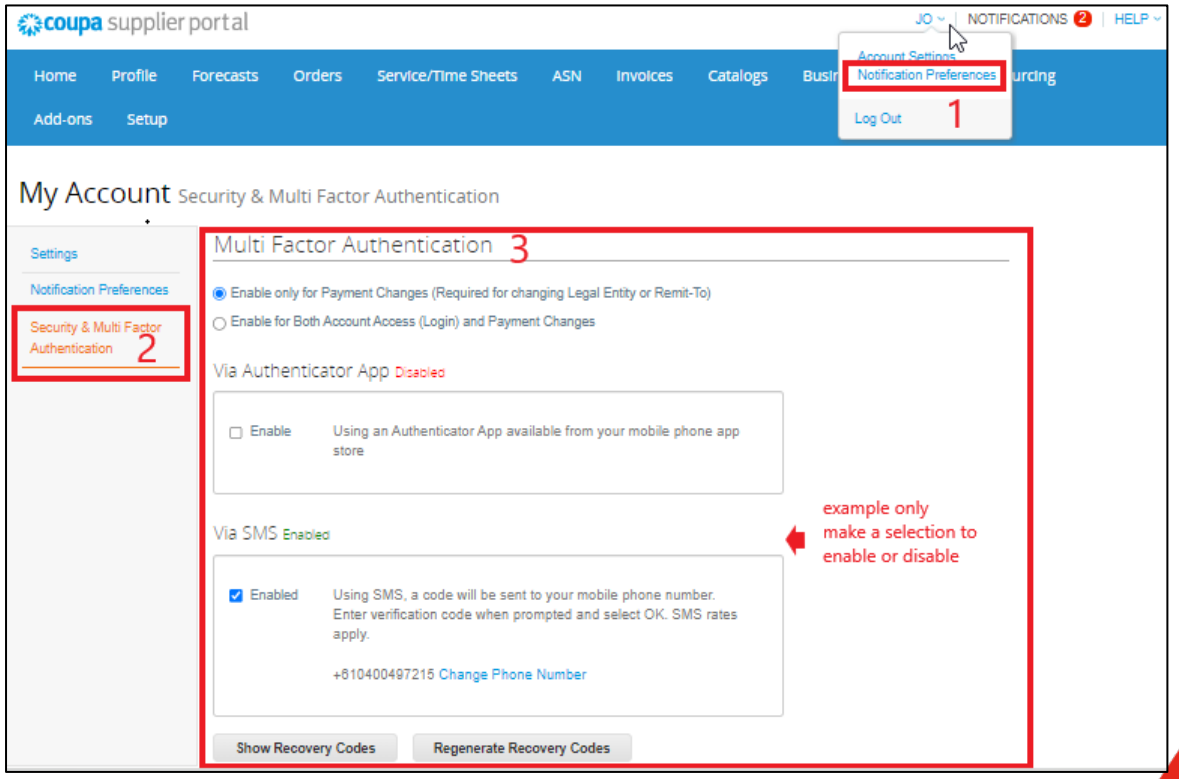
RFS

My Account > Security & Multi Factor Authentication - here you can enable or disable your Multi Factor Authentication



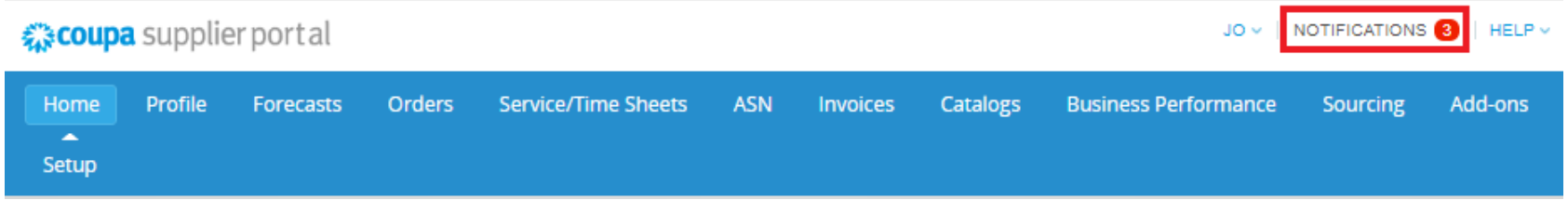
Under **My Account > Security & Mutli Factor Authentication** you can change the current setting for additional security of your CSP account.

1. **My Account** - Click on the down arrow next to **My Account** then click **Notification Preferences**
2. **Security & Multi Factor Authentication** is located under the left nav after clicking **Notification Preferences.**
3. **Multi Factor Authentication –** here you can enable or disable and select how you would like to receive the verification codes either via authenticator app or via sms.



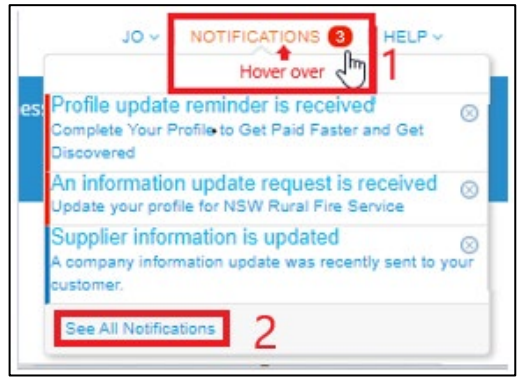
SIM – Notifications

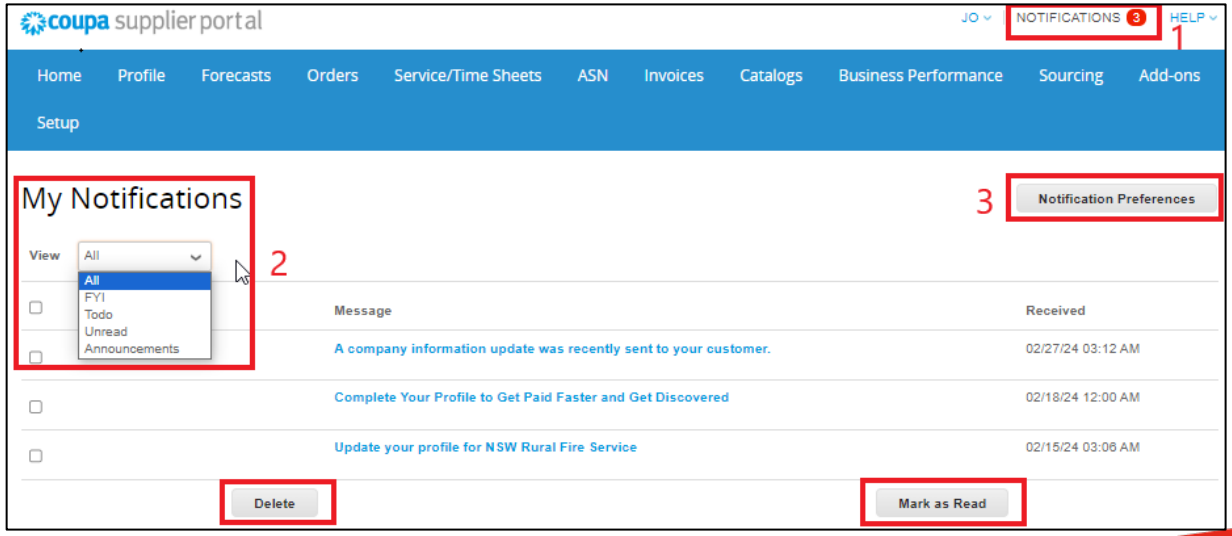
Notifications - here you can view your notifications and see what is new



Under **Notifications** you can view new messages and change your notification settings.

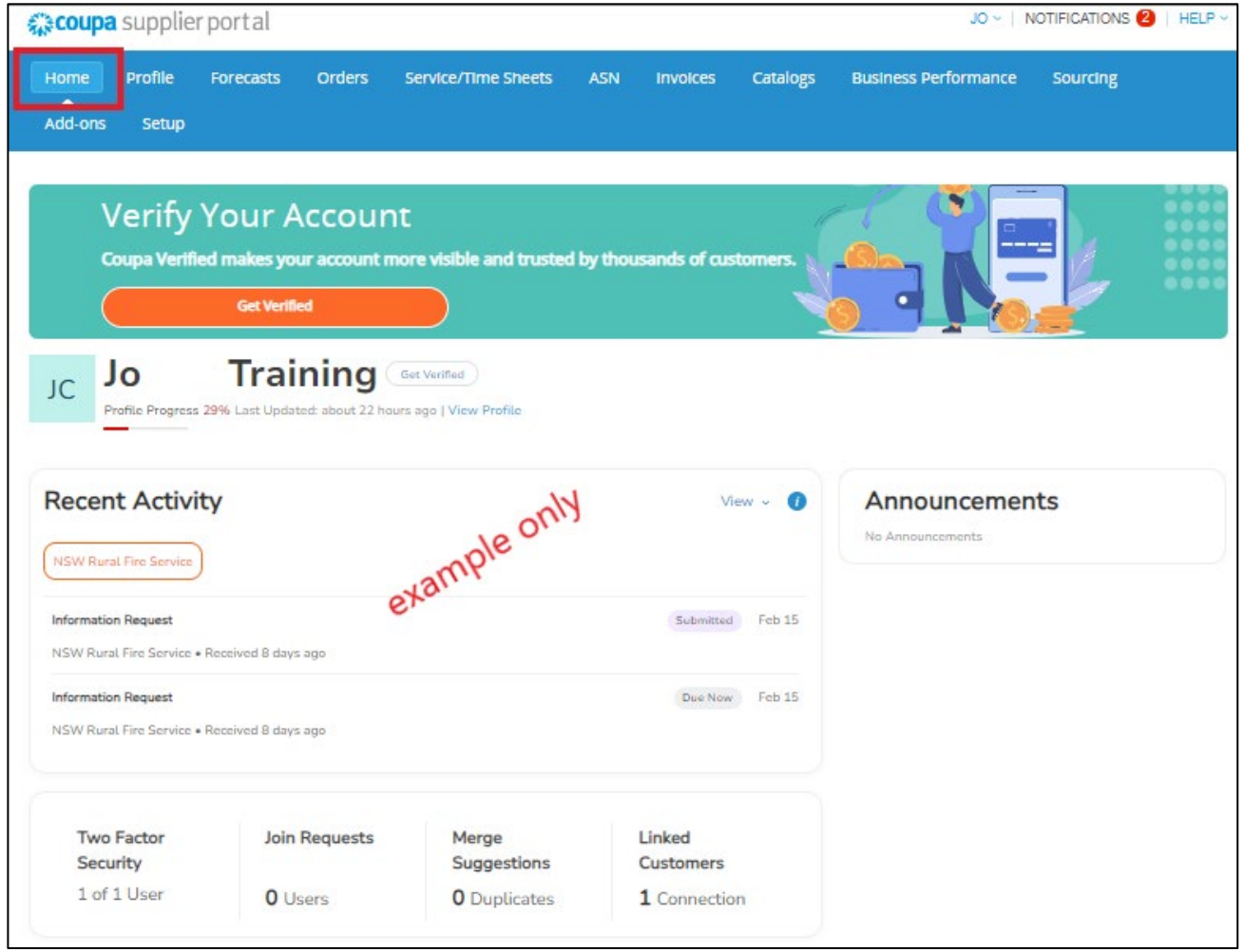
1. **Notifications** - You can hover the Notifications link to see your unread system messages. Only 3 most recent ones are shown.
2. **See all Notifications –** click on the **See all Nofitications** when you hover over **Notifications** link or view all the notifications with their details and to manage them, click on **Notifications** link and then view All from the drop down. You can select and **delete**, or **mark as read**.
3. **Notification Preference –** click on the **Notification Preferences** button to change your setting. You can also access this via **My Account.**
   Once you have enabled and disabled the notifications you would like to receive – click **save.**





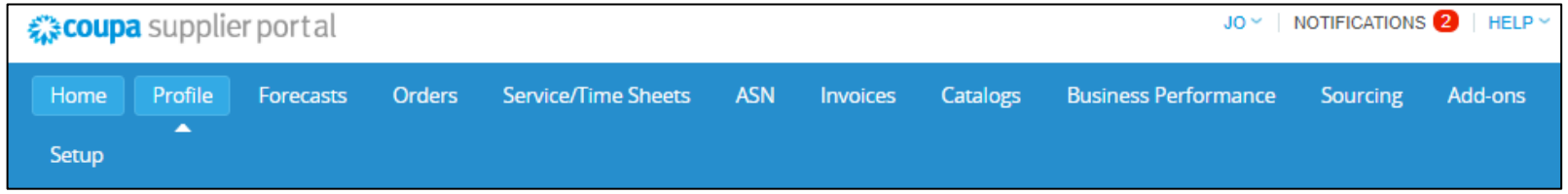
SIM – Coupa Home tab

Home tab – under this main page includes all access, you can view and improve your public company profile, view recent activity & announcements

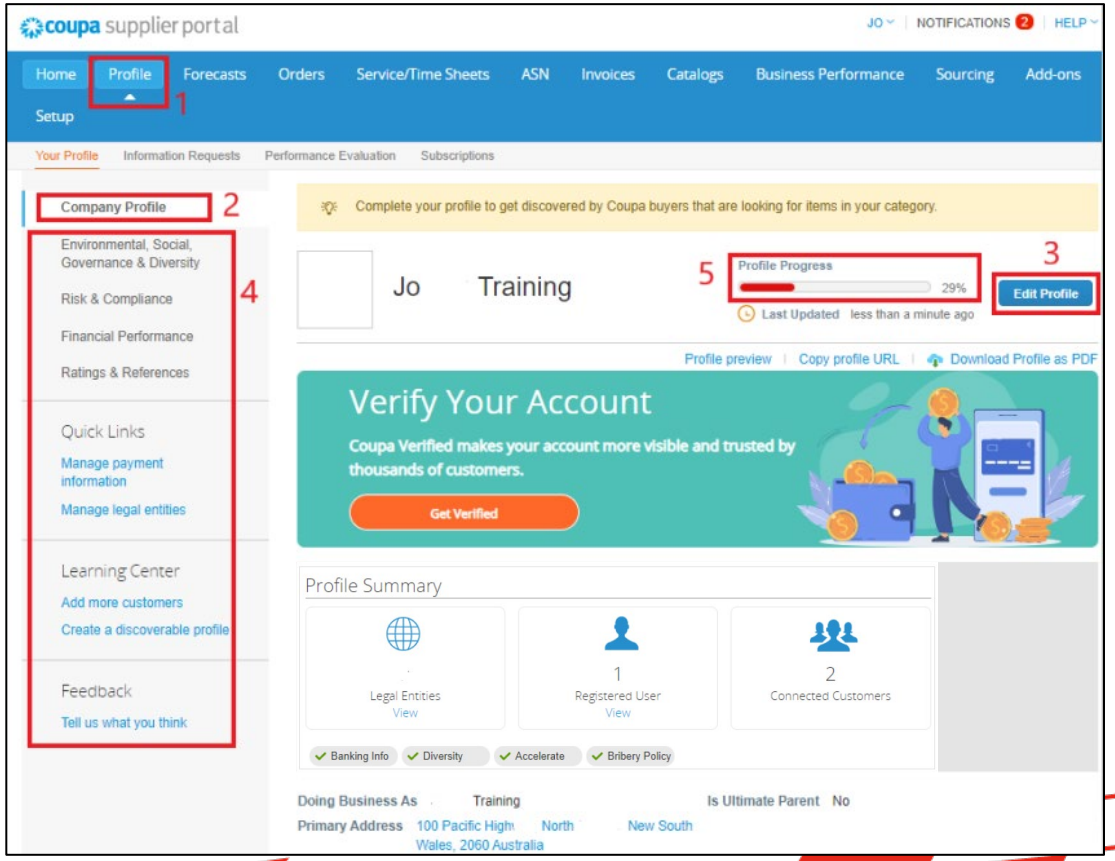


SIM – Coupa Profile tab

Profile tab – This section relates to your Company profile. Here you can manage your public profile on the Coupa Portal. Your public profile is visible to Coupa users in the Supplier Directory.

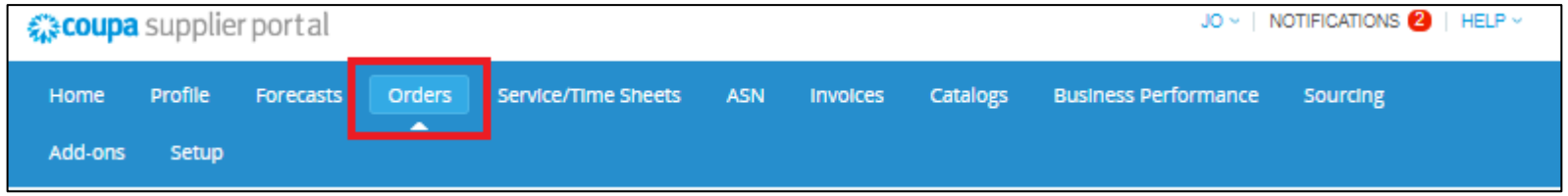


1. **Profile Tab –** here you can create your public profile to let customers know what your business does
2. **Company Profile –** give customers background information about your business.
3. **Edit Profile –** select the edit profile button to update your information or edit each individual section from the left nav bar
4. **Left Navigation bar –** here you can complete additional information by clicking on the relevant sections.
5. **Profile Progress –** this indicator provides a summary of how complete your profile is and when the profile was last updated.



SIM – Coupa Orders tab

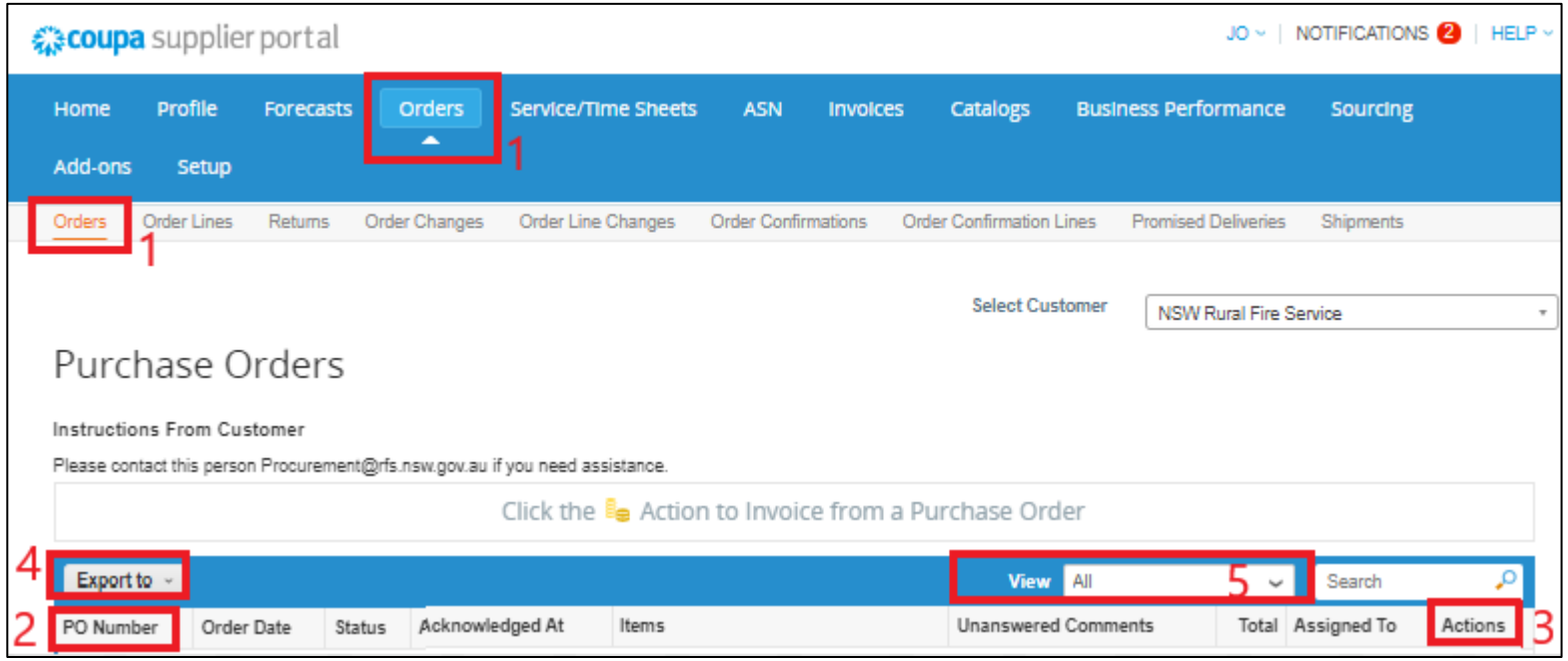
Orders tab – here you can manage your Purchase Orders (PO's) you have received from RFS



1. **Orders** – here you will be able to see the history of POs
2. **PO Number** – to view details of the order, click on the order number you wish to review.
3. **Actions** – you can create invoices & credit notes under the action section by clicking on the relevant icon

	Create (flip PO into) an invoice
	Create credit note

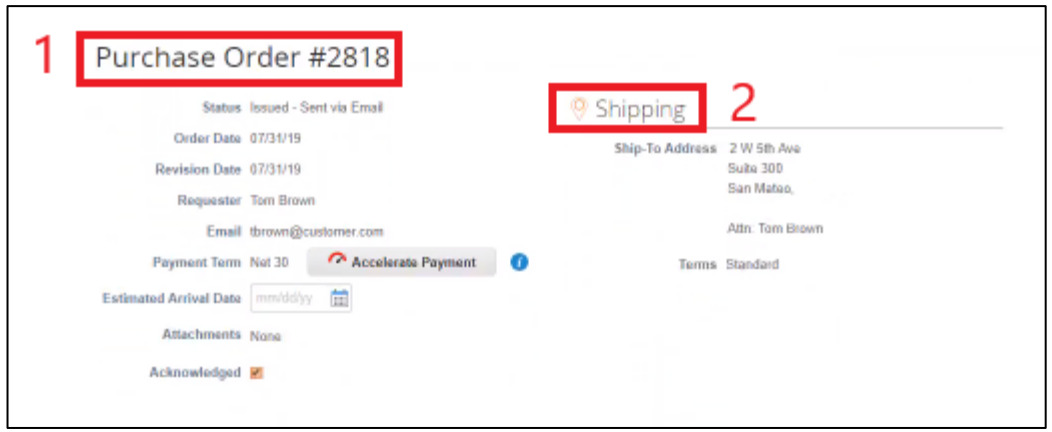
4. **Export to** – run report to excel
5. **View** – you can customise your view by clicking the down arrow & selecting

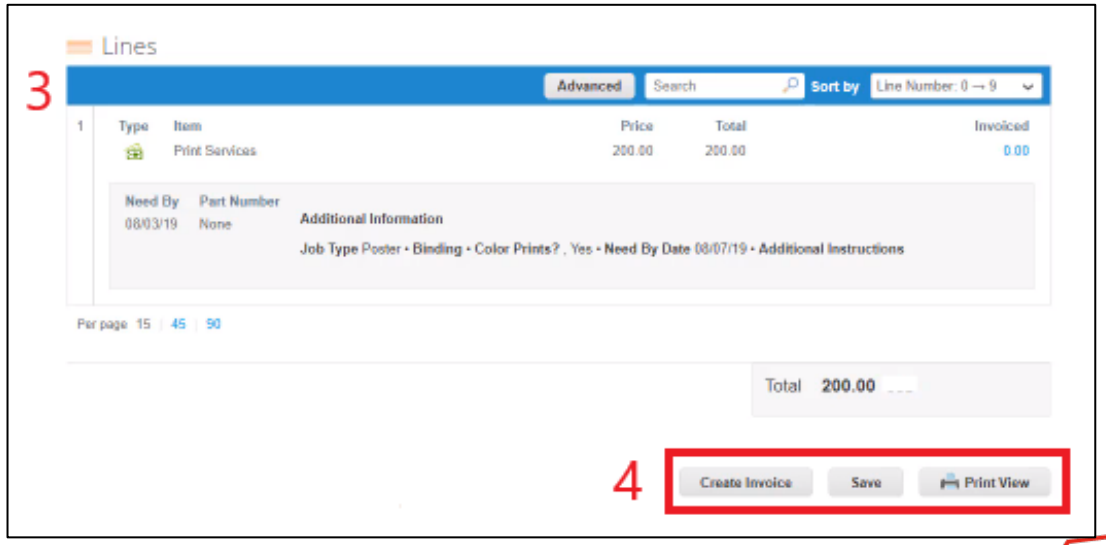


SIM – Coupa Orders tab

Orders tab – here you can review the information contained in a Purchase Order.

1. **PO display** – click the PO number you wish to view and drill down on this will display a description of the order including the status.
2. **Shipping –** the address linked to the PO will be visible under the Shipping section.
3. **Lines** – if there are separate lines or items in the PO you will see them displayed here.
4. **Create Invoice, Save or Print View** – these are the options for processing the purchase order

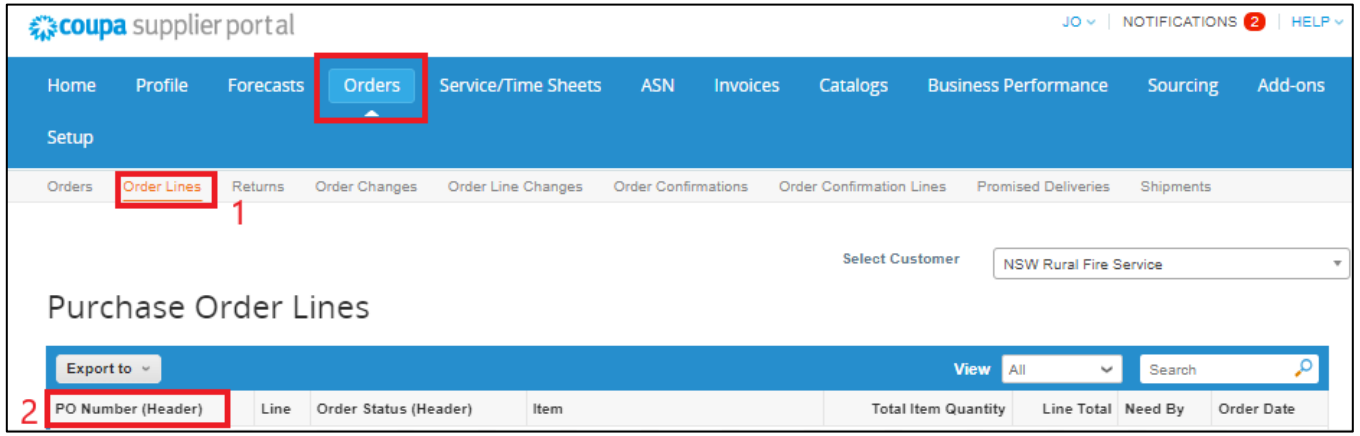


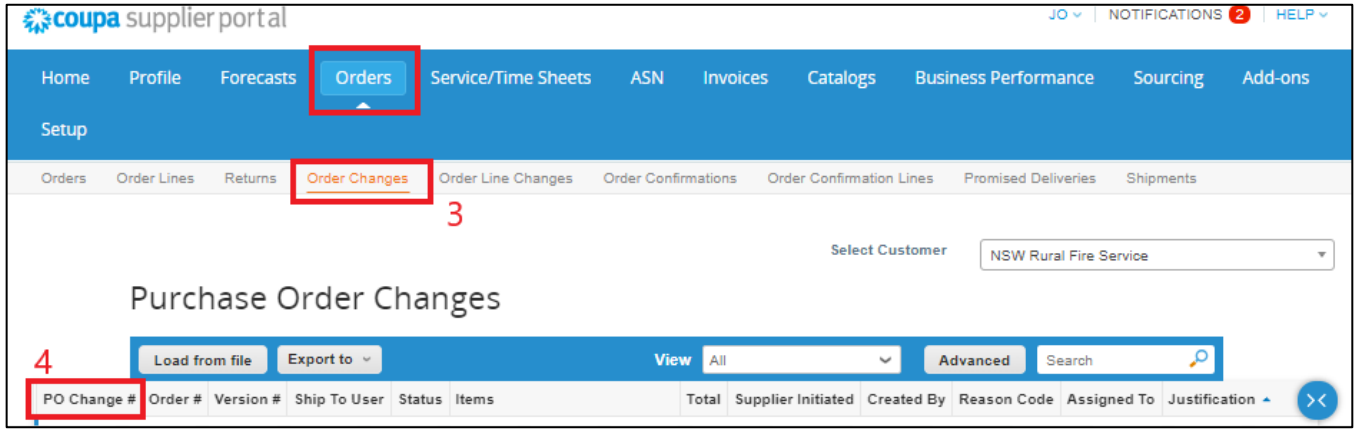


SIM – Coupa Orders tab

Orders tab – here you can view Order Lines and Order Changes

1. **Order Lines** – here you will find the history of order lines associated to POs
2. **PO Number (Header)** – the Purchase orders will be listed under here by number.
3. **Order changes** – here you will be able to view changes to PO
4. **PO changes** – the changed Purchase orders will be listed under here by number





Note – suppliers will not be able to make changes on POs, this option is disabled. You will be able to view change

SIM – Coupa Orders tab

Orders Status – PO's can have the following statuses. What does the status mean?

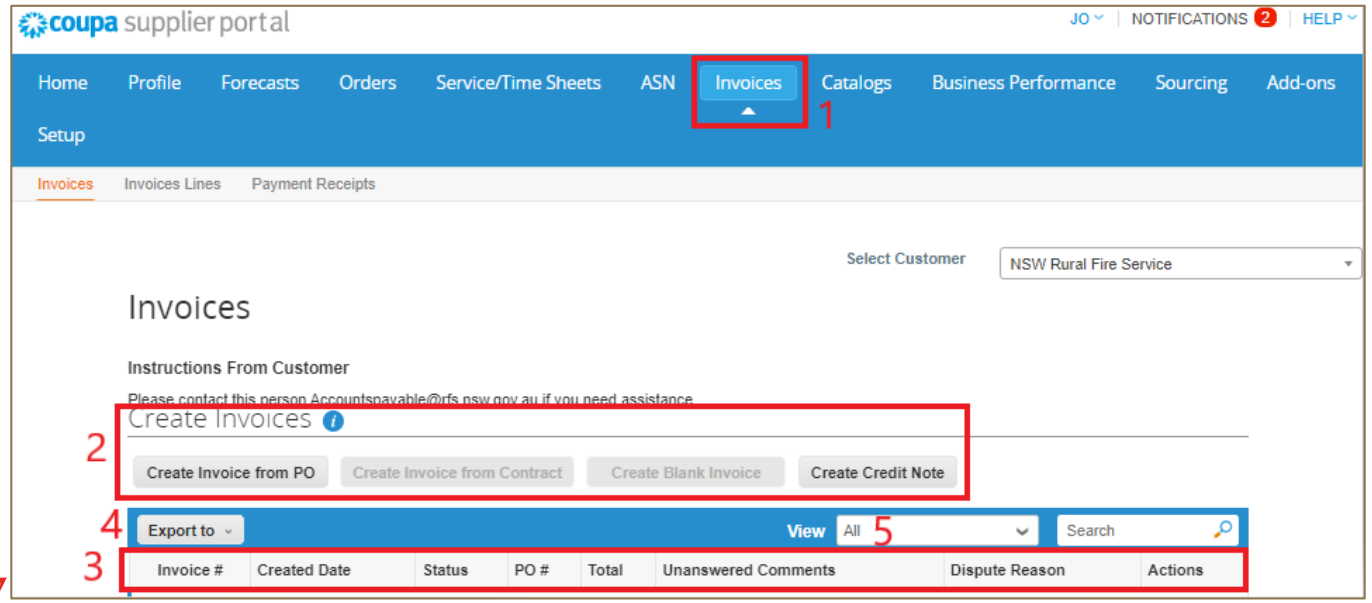
STATUS	DESCRIPTION
Issued	The PO was approved and sent to you
Buyer Hold	The PO is approved but requires your Coupa customer to review it
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status
Closed	The issued PO was received and then closed, either manually or automatically within Coupa
Cancelled	The PO was cancelled and does not need to be fulfilled
Error	Something is wrong with the PO. Contact RFS to get the PO back on track

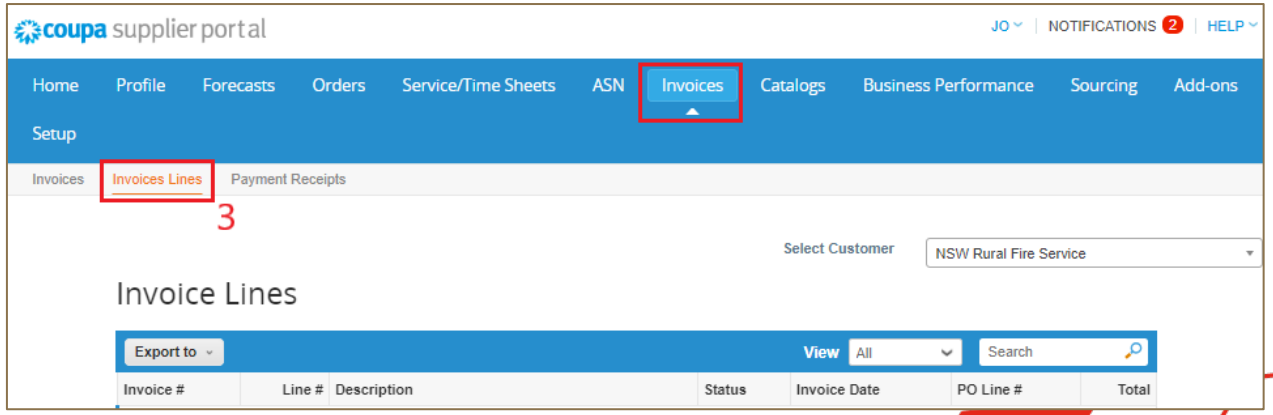
SIM – Coupa Invoices tab

Invoices tab – here you can view the invoices that have been created. To generate a new invoice, you must enter through the orders tab. It may take up to 24 hours for a payment to appear in the CSP after it has been processed. RFS normally process a weekly payment run.

1. **Invoices** – here you will find the history of invoices
2. **Create Invoices –** you have several selections to choose from **Create invoice from PO & Create credit note**
3. **Invoices lines** – you will find general information on the invoices you have made and their status. Click Invoices line to see more info.
4. **Export to** – run a report to excel
5. **View** – you can customise your view by clicking the down arrow & selecting

Note – To generate a new invoice, you must enter through the orders tab

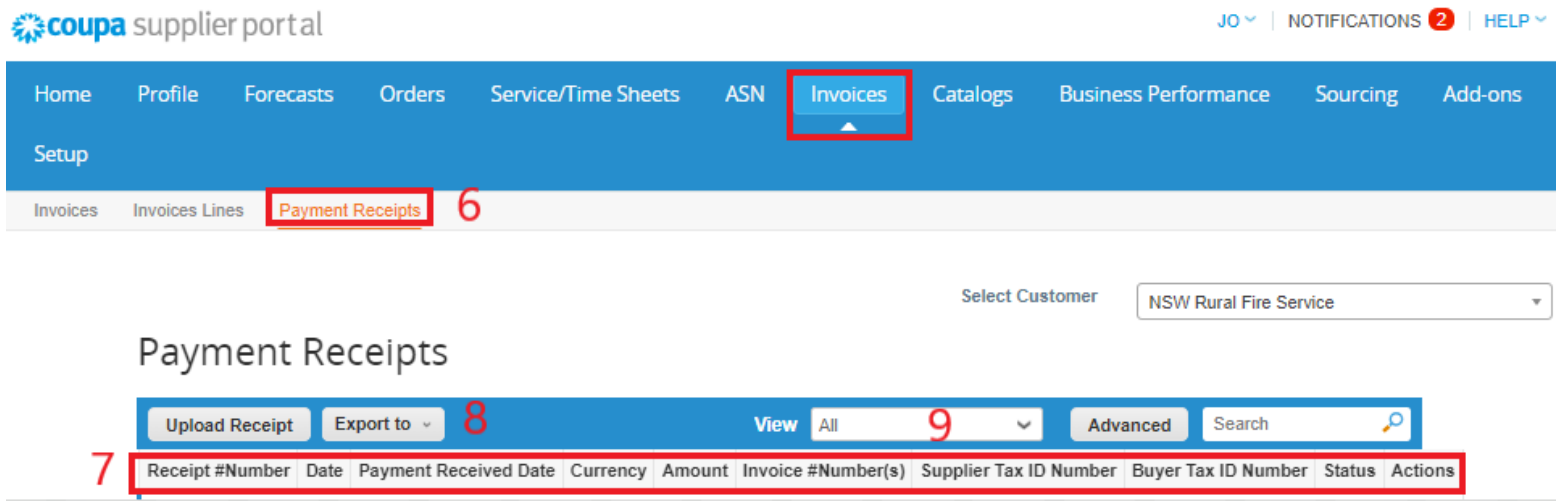




SIM – Coupa Invoices tab

Invoices / Payment Receipts tab – here you can view the status of your payments by navigating to the payment receipts tab. Each payment is linked to the associated invoices for easy reconciliation.

6. Under the **Invoices** tab select **Payment Receipts** – here you will find the history of payments made with the receipt number.
7. **Payment Receipts line** – you will find general information on the payment and their status. Click the individual receipt to see more info.
8. **Export to** – run a report to excel
9. **View** - you can customise your view by clicking the down arrow & selecting



SIM – Coupa Invoices tab

RFS

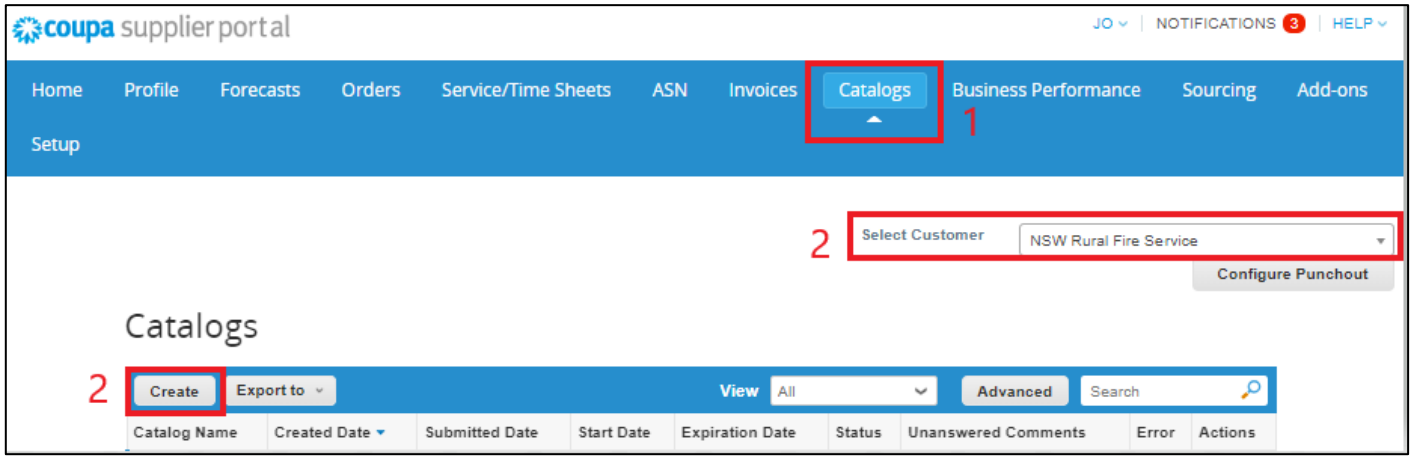
Invoices Status – Invoices can have the following statuses. What does the status mean ?

STATUS	DESCRIPTION
Draft	The invoice has been created, but not yet submitted to RFS and can still be edited
Pending Approval	The invoice is currently under review & awaiting approval for payment by RFS
Approved	The invoice has been accepted/approved for payment by RFS
Processing	The invoice is being processed by AP, submitted and received by RFS and should be paid soon
Disputed	The invoice has been disputed by RFS
Voided	The invoice not valid, something is wrong (status of invoice once resolution of a disputed invoice)

SIM – Coupa Catalogs tab

Catalgogs tab – here you can create, manage and update Catalogues in the CSP which will undergo approvals in Coupa. Please discuss Catalogs with RFS Procurement by emailing procurement@rfs.nsw.gov.au

1. **Catalogs –** are managed by RFS
2. **Create (manual) – select customer** from the drop down and then click **create**
3. **Enter info** – enter the Catalogue name, start date, expiry date and currency.
4. **Create (Load from file) –** to create from a file you can insert data into an excel template, save and start upload

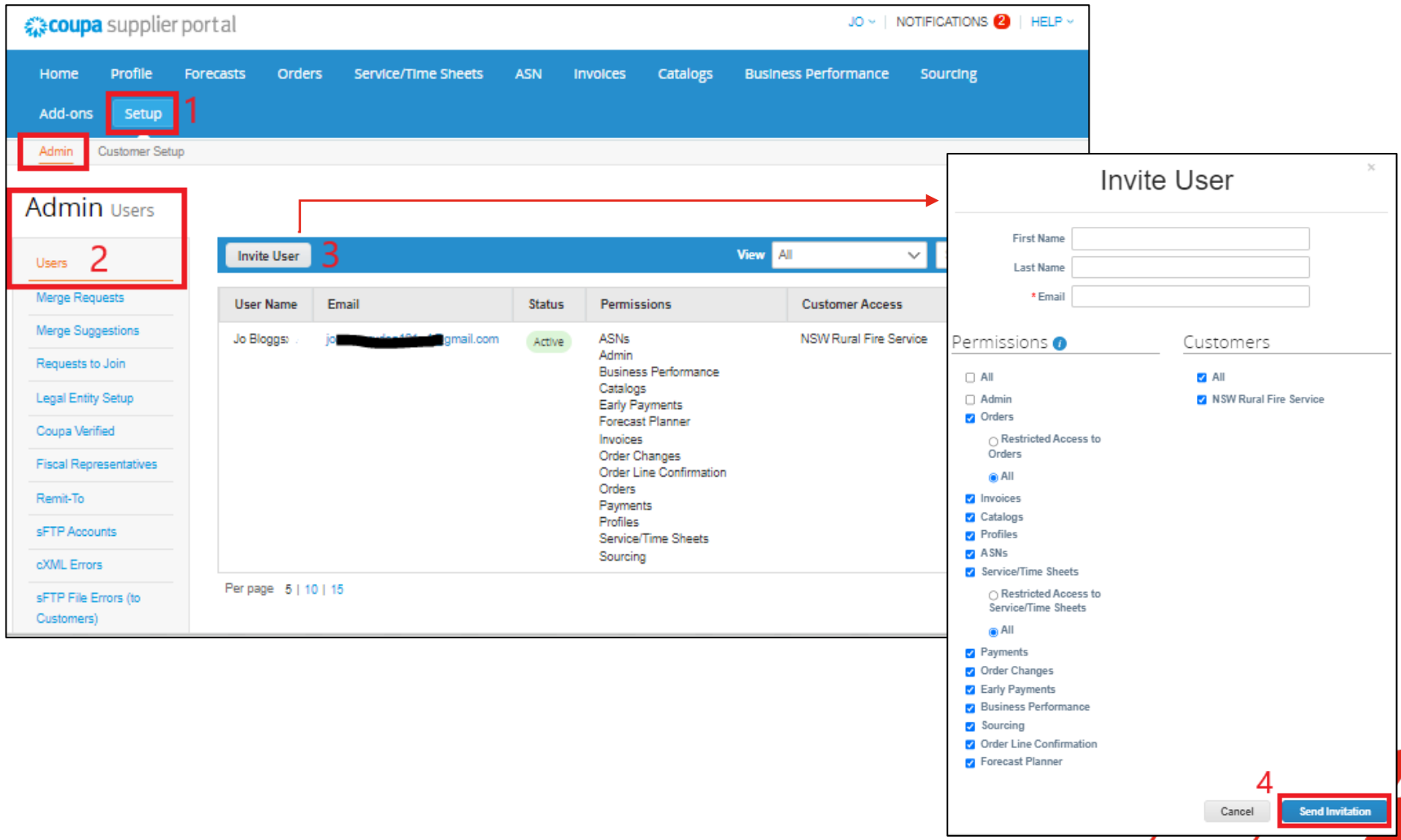


SIM – Coupa Setup tab > Users

RFS

Setup tab > Users – here you can invite new users from your company and grant users their permissions & customer connections

1. **Set up** – click the **Setup** button which takes you into Admin section.
2. **Users** – select **Users** from the left nav.
3. **Invite Users** – click the **Invite User** button, you will be prompted with Multi factor authentication if turned on. **Invite User** window will appear - fill in the information of the user you which to add, then grant permissions and customer access by click the box with a tick to enable and disable.
4. **Send Invitation** – once done click the **Send invitation** button

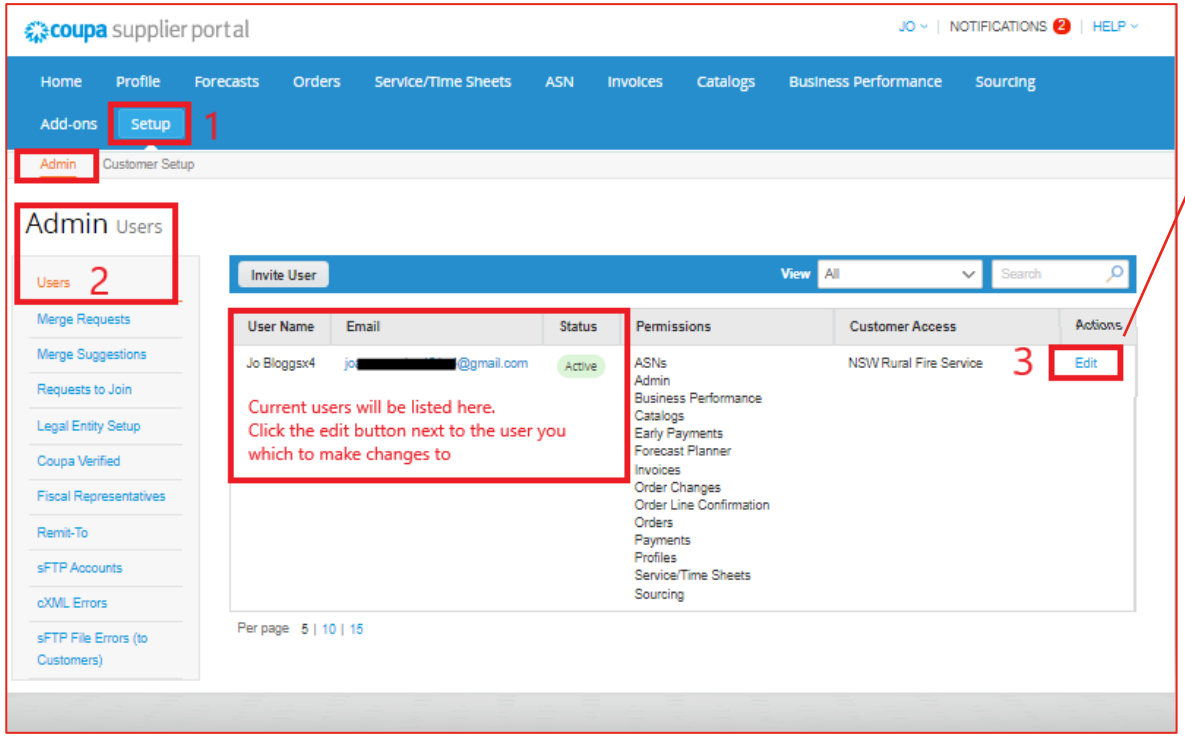


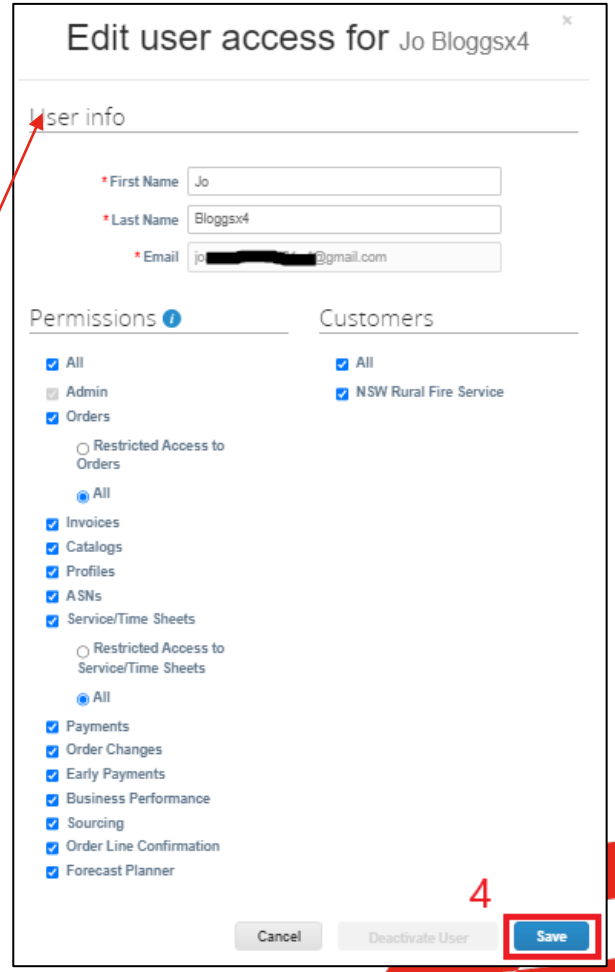
SIM – Coupa Setup tab > Edit

RFS

Setup tab > Edit – here you can edit users - change their permissions & customer connections

1. **Set up** – click the **Setup** button which takes you into Admin section.
2. **Users** – select **Users** from the left nav.
3. **Edit** – click the **Edit** button next to the user you which to modify/change. The **Edit User access for [name]** window will appear– enable or disable the permissions or customers setting by click on the box with a tick.
4. **Save** – once done click the **Save** button



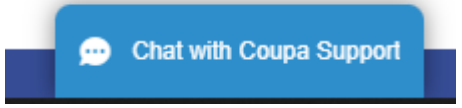


SIM – Help

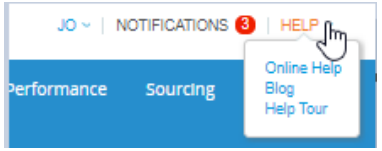
RFS

Coupa Support

At any time while completing the onboarding process you need to speak with someone you can click the Chat with Coupa Support located at the bottom right-hand side of your screen.



For any general CSP technical or functional question you can try searching in the Supplier Help Centre otherwise if you can't find the answer there, then you can contact the Couper Supplier Support Team at supplier@coupa.com

For more information about Coupa, Supplier can visit the Coupa Supplier Page

While logged into the CSP – you can also click the **Help** tab for **Help Tour**, **Blog** and **Online Help** this will navigate to the Coupa Success Portal