



RFS



Coupa Supplier Portal (CSP)

Supplier User Guide

How to Navigate the Portal (CSP)



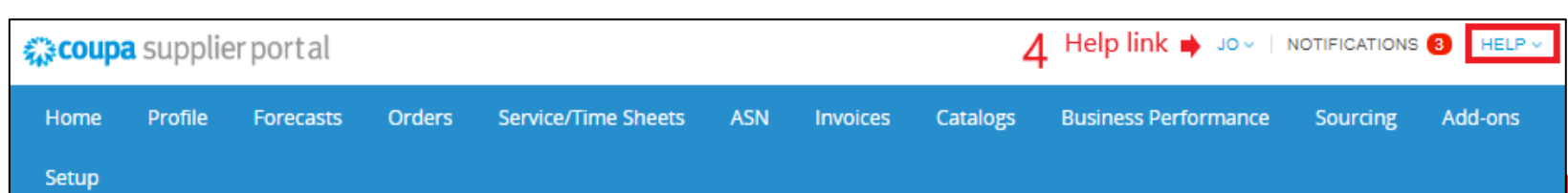
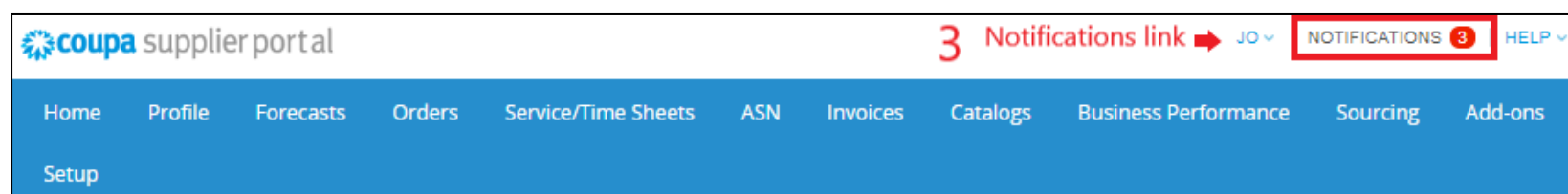
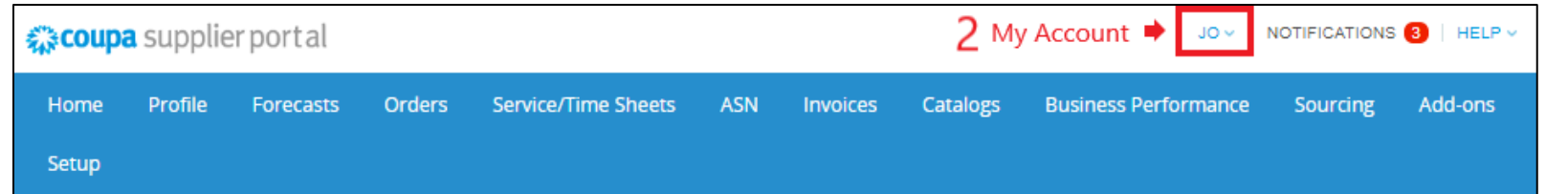
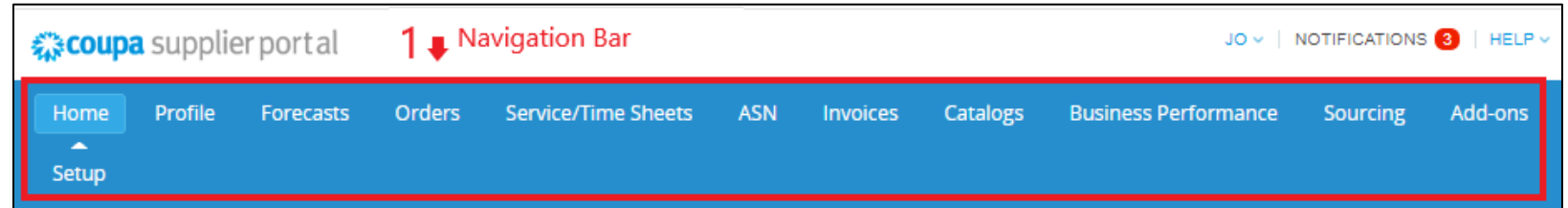
SIM – Coupa Homepage



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

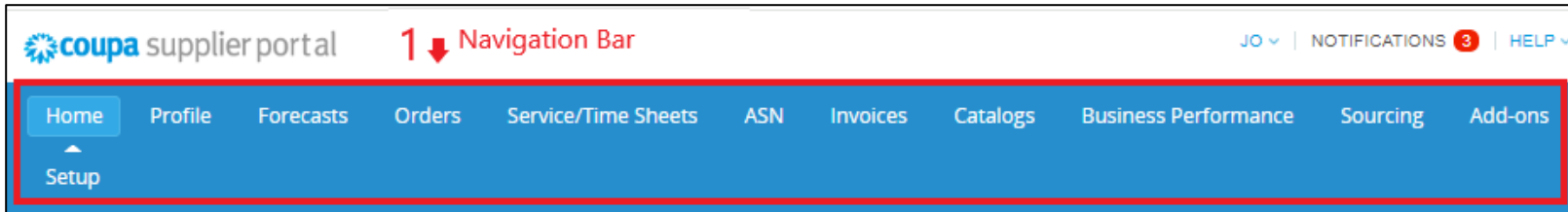
On the homepage you will see the key buttons :-

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

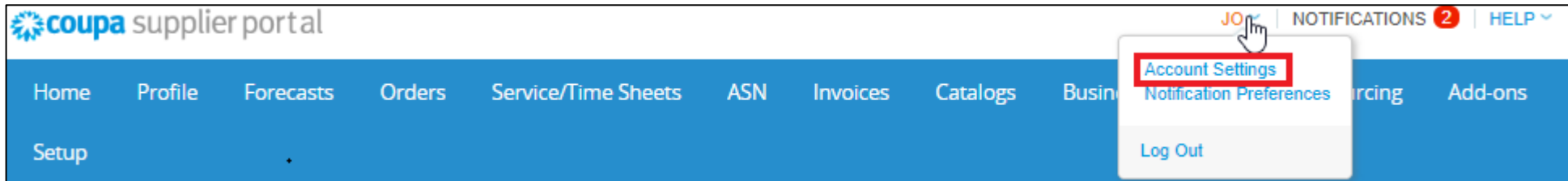
On the homepage at the top you will find the menu for the options available within the portal. Below are the functions you can perform from the blue Navigation bar – some functions are not supported for RFS and greyed out in the below list.



- **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

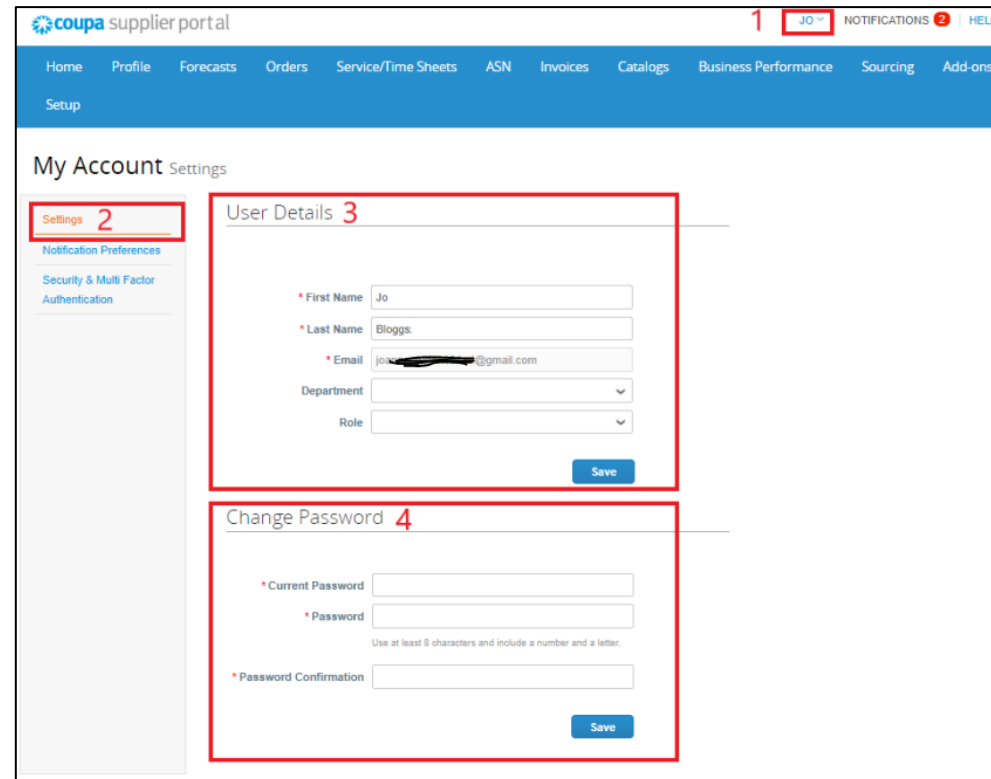
SIM – My Account > Account Settings

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.

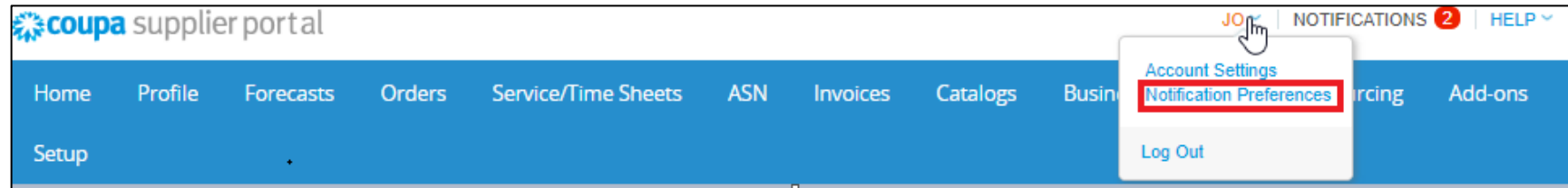
1. **My Account (listed with a name)** click on the arrow then
2. **Settings** – click on settings
3. **User Details** –check info is correct and update if needed, you can also add in your department and role once entered click save
4. **Change Password** – option to change your password if needed then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



SIM – My Account > Notification Preferences



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.

My Account Notification Preferences

Settings

- Notification Preferences 2
- Security & Multi Factor Authentication

You will start receiving notifications when your customers enable them.

Email [redacted]@gmr Mobile(SMS) +61 400 4... Verify

Verify number to receive SMS

Account Access 3

Category	Online	Email	SMS
Request to Join	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Merge Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Announcements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Customer Announcement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Service/Time Sheets

Category	Online	Email	SMS
A Service/Time Sheet is rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A Service/Time Sheet is approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

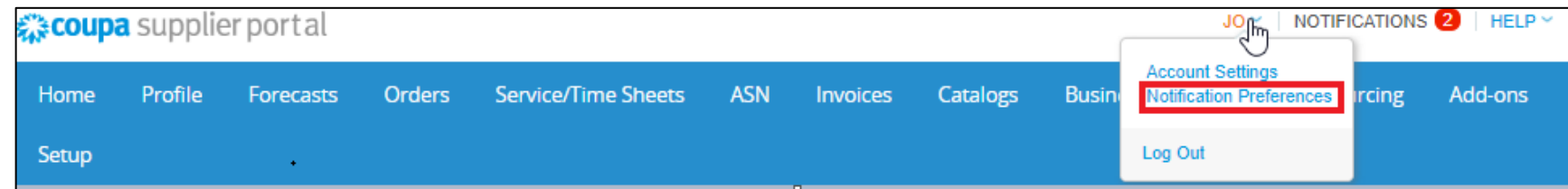
Cancel Save

Extract of some of the category headings from Notification Preferences

SIM – My Account > Security & Mutli Factor Authentication

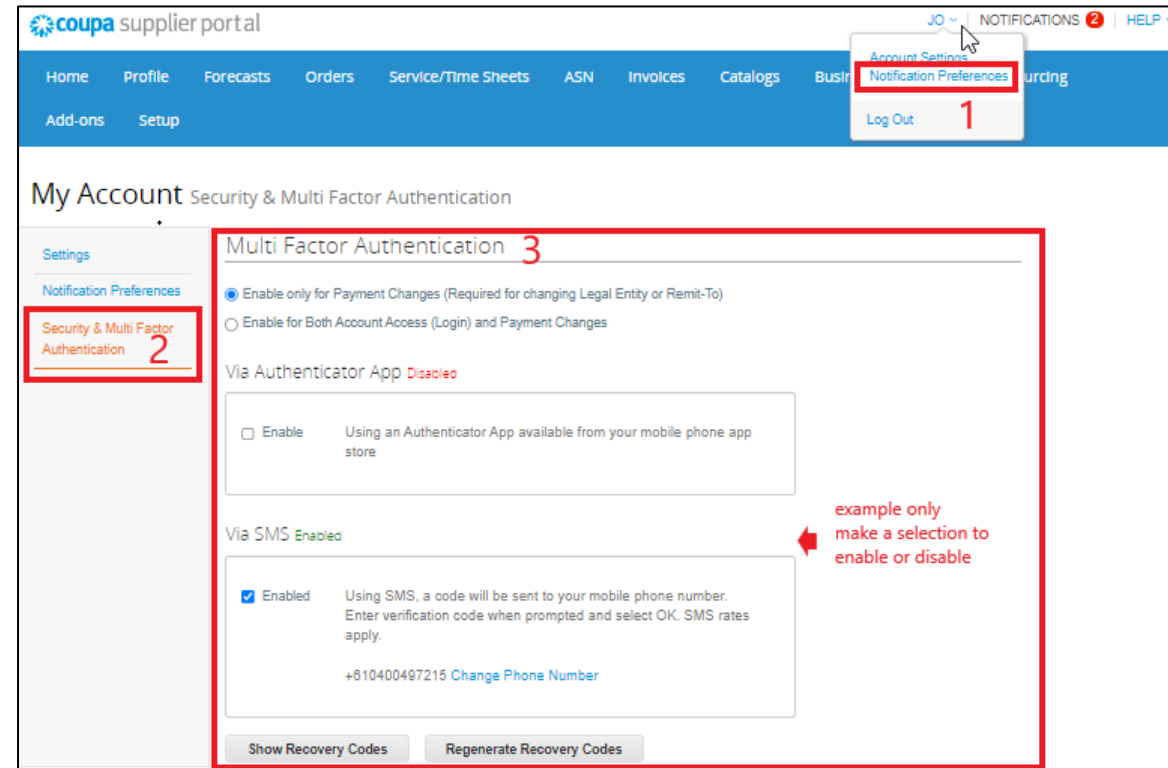


My Account > Security & Multi Factor Authentication - here you can enable or disable your Multi Factor Authentication



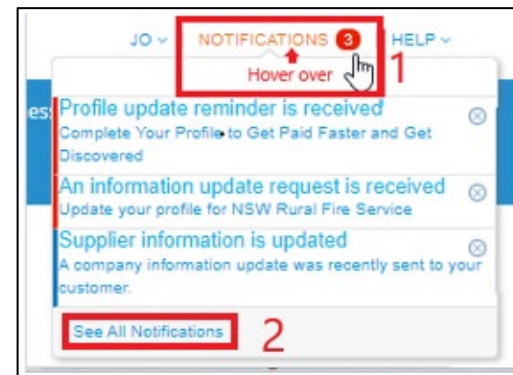
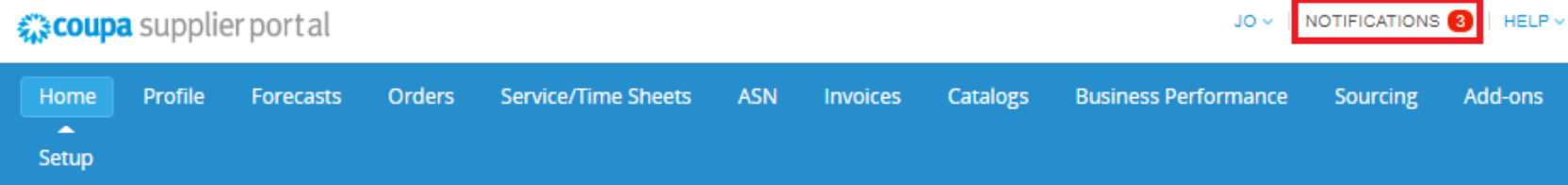
Under My Account > Security & Mutli Factor Authentication you can change the current setting for additional security of your CSP account.

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.



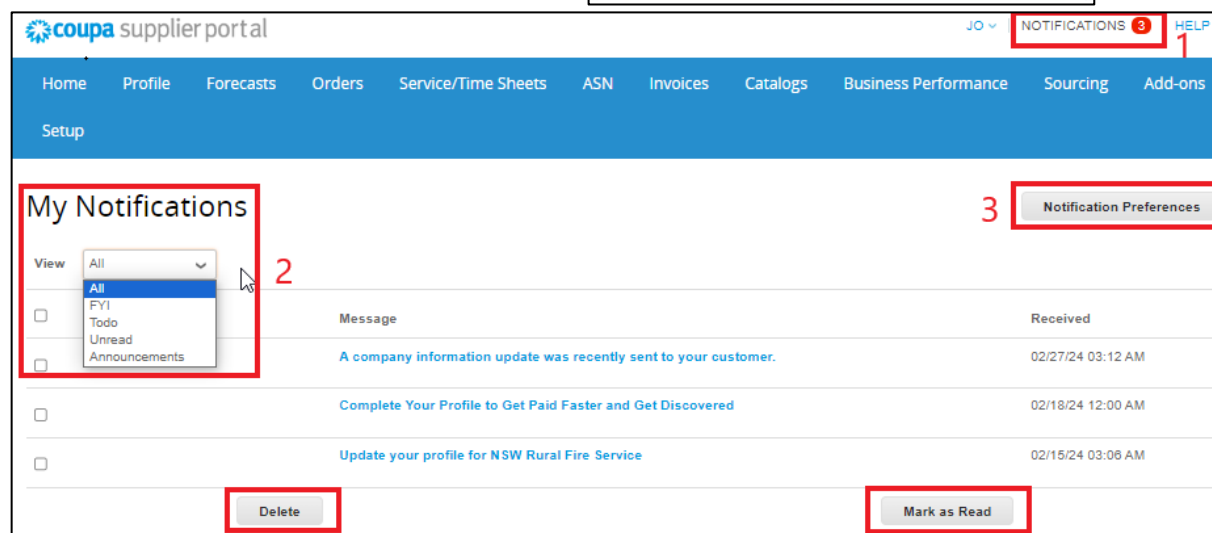
SIM – Notifications

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 Notifications** 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

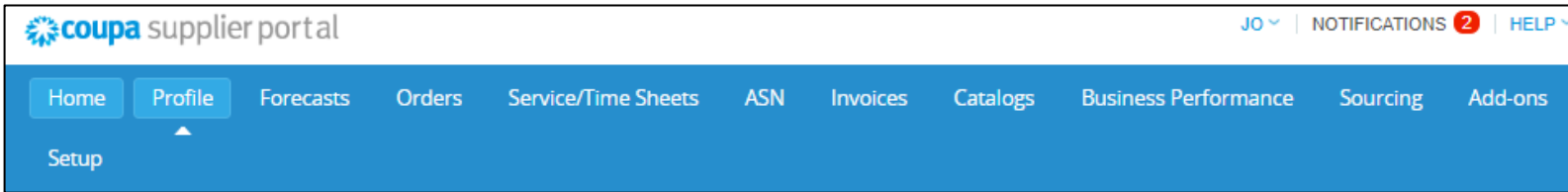


Home tab – under this main page includes all access, you can view and improve your public company profile, view recent activity & announcements

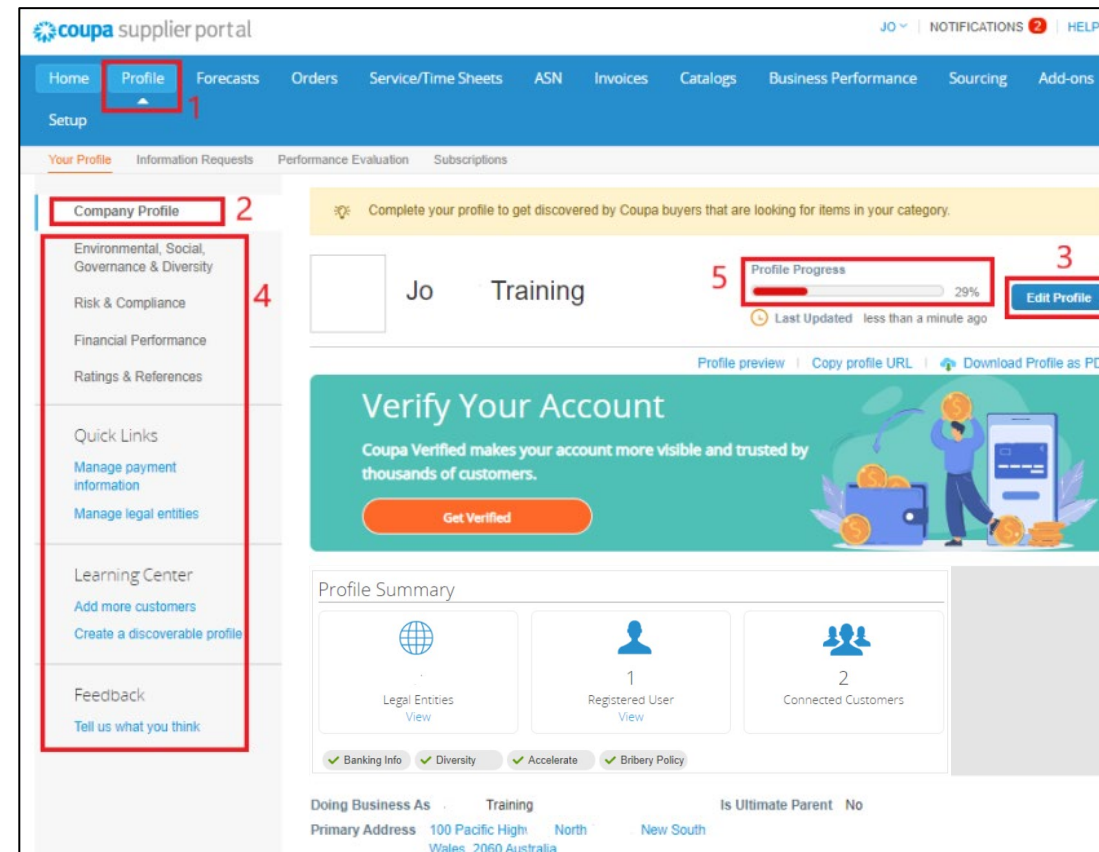
A screenshot of the Coupa Supplier Portal Home tab. The page has a blue header with the 'coupa supplier portal' logo and navigation links: Home (highlighted with a red box), Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below the header is a 'Verify Your Account' banner with a 'Get Verified' button. The user profile for 'Jo Training' is shown with a 'Get Verified' button and profile progress information. The 'Recent Activity' section lists two 'Information Request' items from 'NSW Rural Fire Service' with status tags 'Submitted' and 'Due Now'. The 'Announcements' section shows 'No Announcements'. At the bottom, there are four summary cards: 'Two Factor Security' (1 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection). A red diagonal watermark 'example only' is overlaid on the activity section.

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.

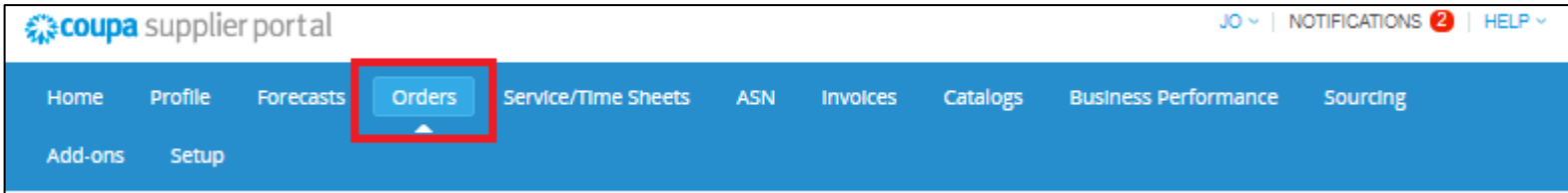


1. **Profile Tab** – here you can create your public profile to let customers know what your business does
2. **Company Profile** – give customers background information about your business.
3. **Edit Profile** – select the edit profile button to update your information or edit each individual section 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

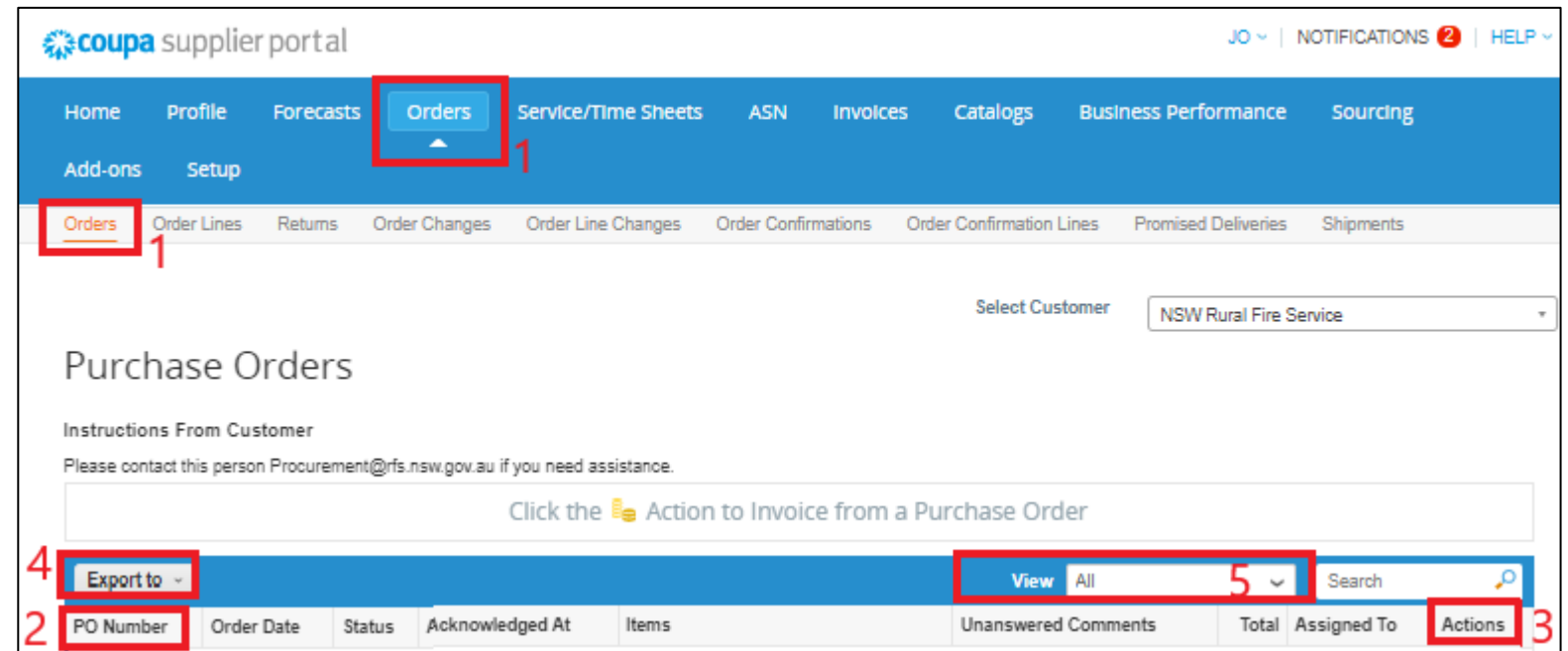
Orders tab – here you can manage your Purchase Orders (PO's) you have received from RFS



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

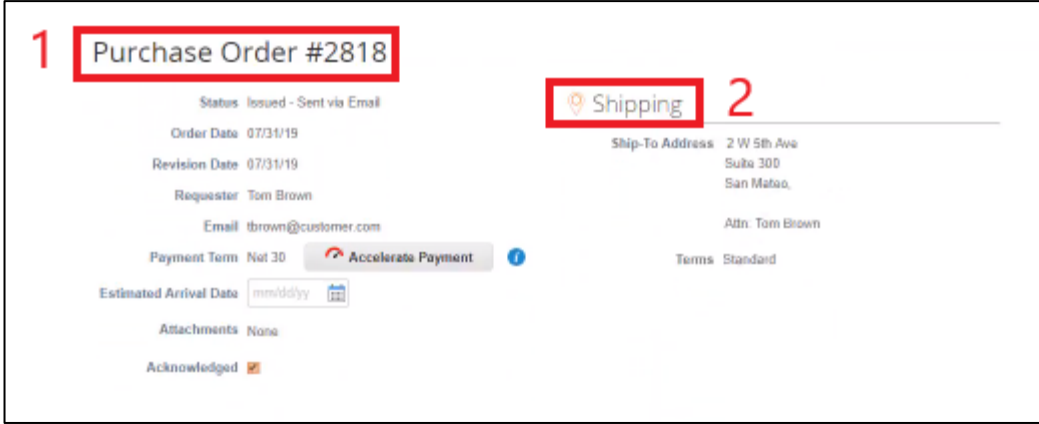
4. **Export to** – run report to excel
5. **View** – you can customise your view by clicking the down arrow & selecting



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



1 **Purchase Order #2818**

Status: Issued - Sent via Email

Order Date: 07/31/19

Revision Date: 07/31/19

Requester: Tom Brown

Email: tbrown@customer.com

Payment Term: Net 30 [Accelerate Payment](#)

Estimated Arrival Date:

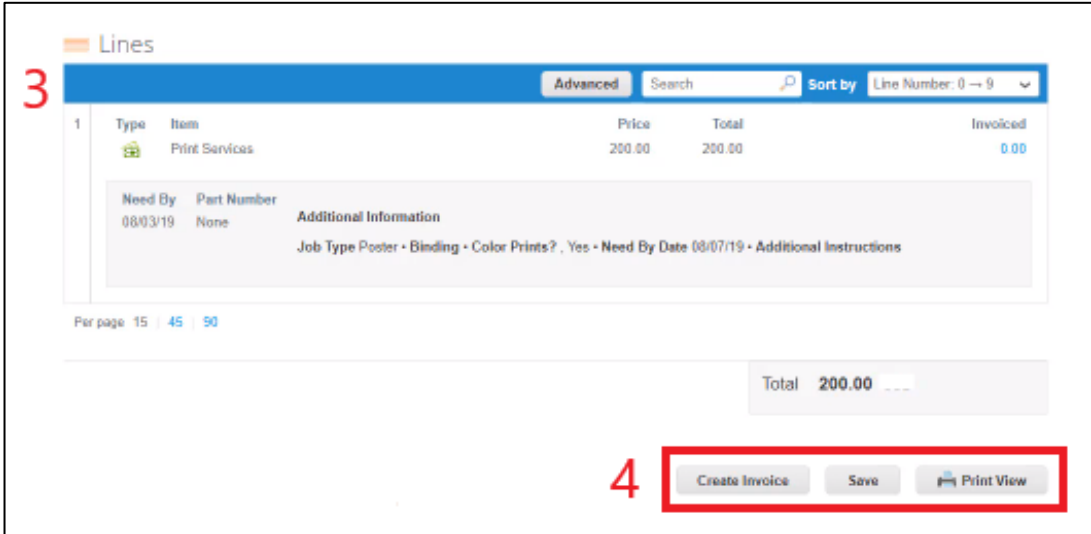
Attachments: None

Acknowledged

2 **Shipping**

Ship-To Address: 2 W 5th Ave
Suite 300
San Mateo,
Attn: Tom Brown

Terms: Standard



3 **Lines**

Advanced Search Sort by Line Number: 0 – 9

Type	Item	Price	Total	Invoiced
	Print Services	200.00	200.00	0.00

Need By: 08/03/19 Part Number: None Additional Information: Job Type Poster • Binding • Color Prints? • Yes • Need By Date 08/07/19 • Additional Instructions

Per page: 15 | 45 | 90

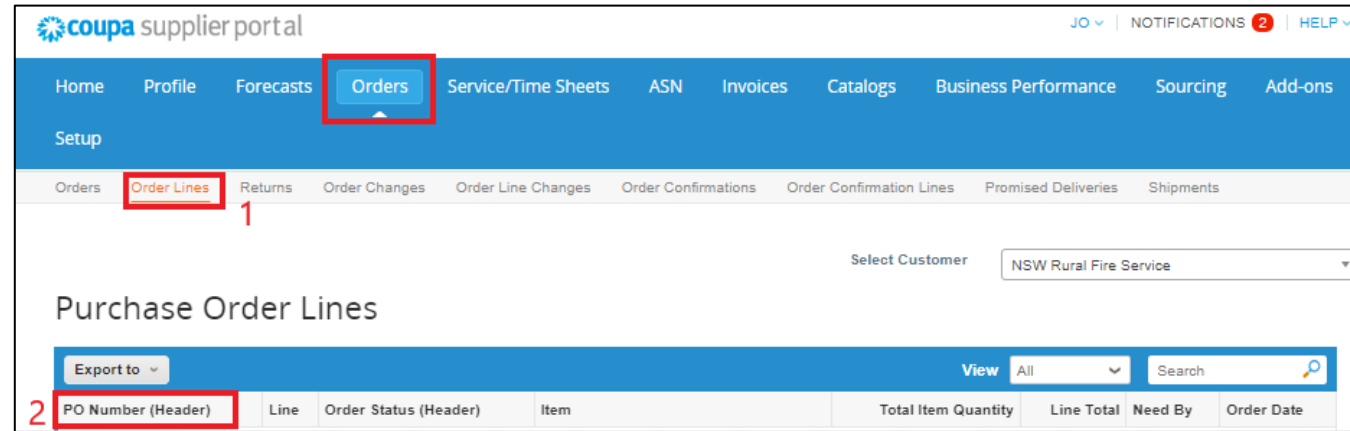
Total: 200.00

4 **Create Invoice** **Save** **Print View**

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



coupa supplier portal

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

Setup

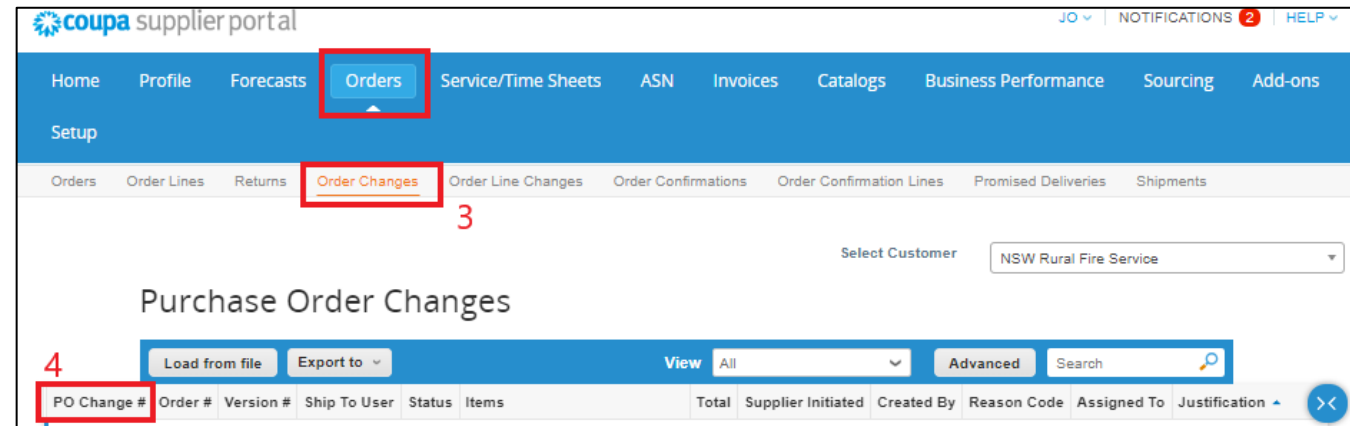
Orders **Order Lines** Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer NSW Rural Fire Service

Purchase Order Lines

Export to View All Search

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total	Need By	Order Date
---------------------------	------	-----------------------	------	---------------------	------------	---------	------------



coupa supplier portal

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

Setup

Orders Order Lines Returns **Order Changes** Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer NSW Rural Fire Service

Purchase Order Changes

Load from file Export to View All Advanced Search

PO Change #	Order #	Version #	Ship To User	Status	Items	Total	Supplier Initiated	Created By	Reason Code	Assigned To	Justification
--------------------	---------	-----------	--------------	--------	-------	-------	--------------------	------------	-------------	-------------	---------------

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?

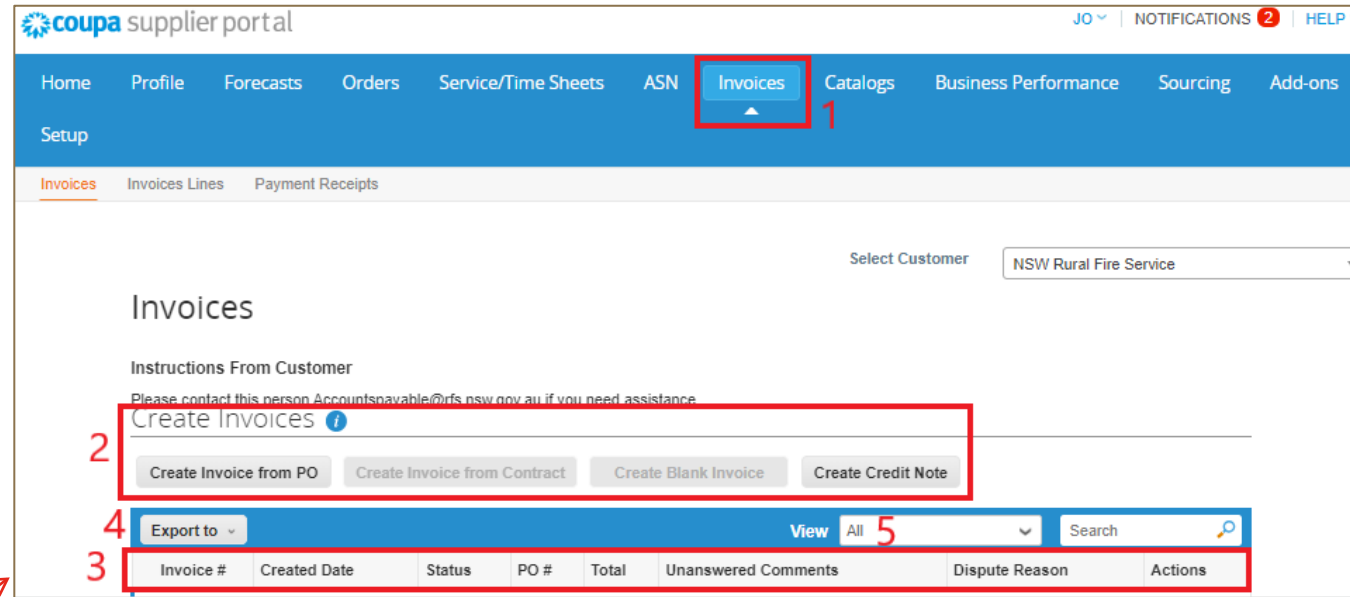
STATUS	DESCRIPTION
Issued	The PO was approved and sent to you
Buyer Hold	The PO is approved but requires your Coupa customer to review it
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status
Closed	The issued PO was received and then closed, either manually 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



coupa supplier portal

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

Setup

Invoices Invoices Lines Payment Receipts

Select Customer NSW Rural Fire Service

Invoices

Instructions From Customer

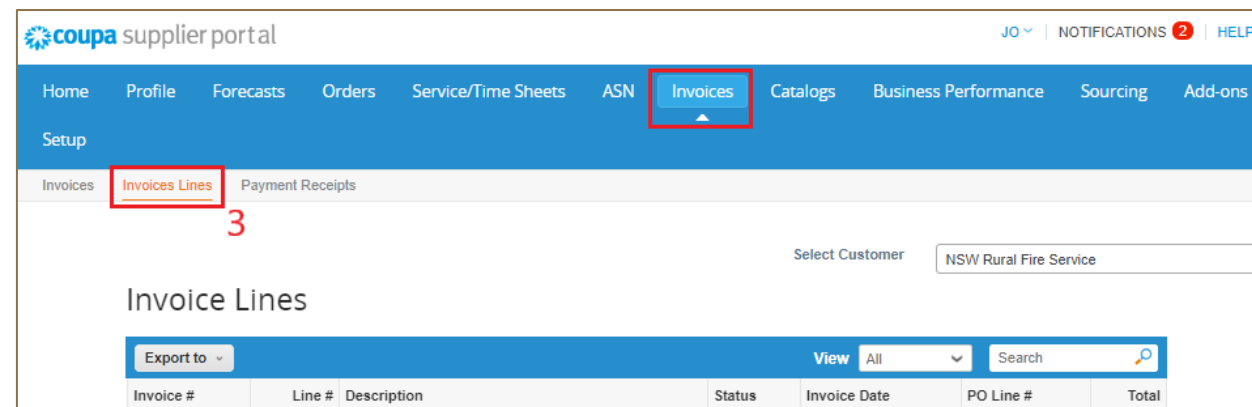
Please contact this person Accounts@rfs.nsw.gov.au if you need assistance.

2 Create Invoices

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

Export to View All **5** Search

3 Invoice # Created Date Status PO # Total Unanswered Comments Dispute Reason Actions



coupa supplier portal

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

Setup

Invoices **Invoices Lines** Payment Receipts

Select Customer NSW Rural Fire Service

Invoice Lines

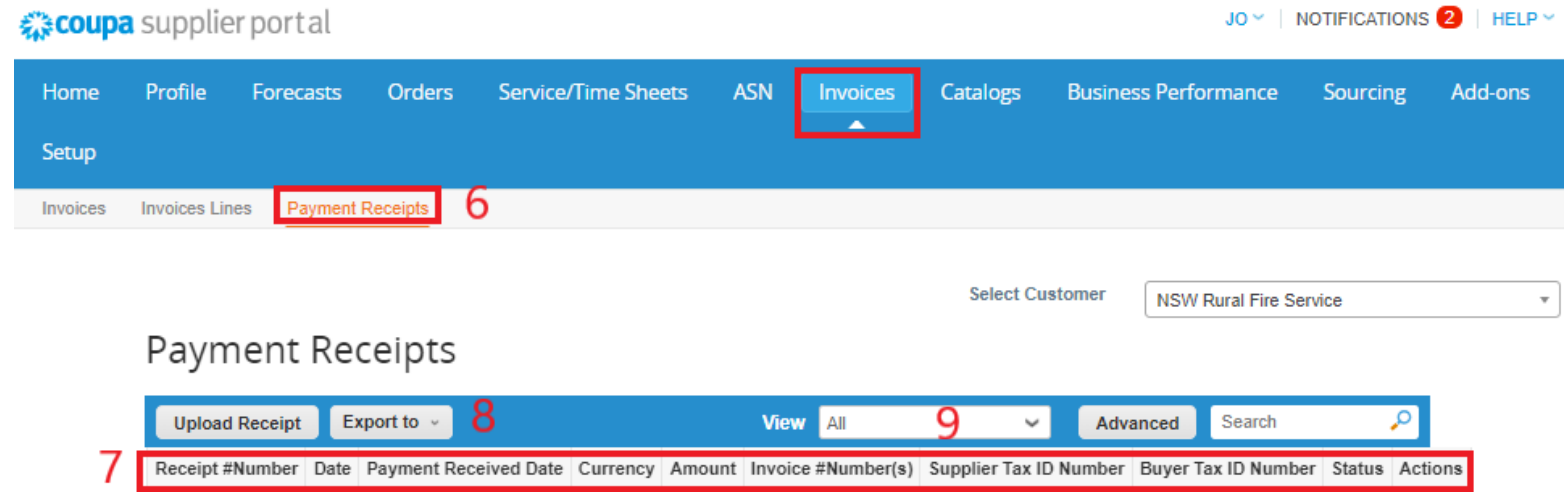
Export to View All Search

Invoice # Line # Description Status Invoice Date PO Line # Total

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



The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'JO | NOTIFICATIONS 2 | HELP' is on the right. A blue navigation bar contains the following tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a red box), Catalogs, Business Performance, Sourcing, and Add-ons. Below this is a 'Setup' section with 'Invoices', 'Invoices Lines', and **Payment Receipts** (highlighted with a red box and a red '6'). A 'Select Customer' dropdown menu is set to 'NSW Rural Fire Service'. The main heading is 'Payment Receipts'. Below this is a toolbar with 'Upload Receipt', 'Export to' (highlighted with a red box and a red '8'), 'View' (set to 'All', highlighted with a red box and a red '9'), 'Advanced', and 'Search'. A table header is highlighted with a red box and a red '7', containing columns: Receipt #Number, Date, Payment Received Date, Currency, Amount, Invoice #Number(s), Supplier Tax ID Number, Buyer Tax ID Number, Status, and Actions.

SIM – Coupa Invoices tab



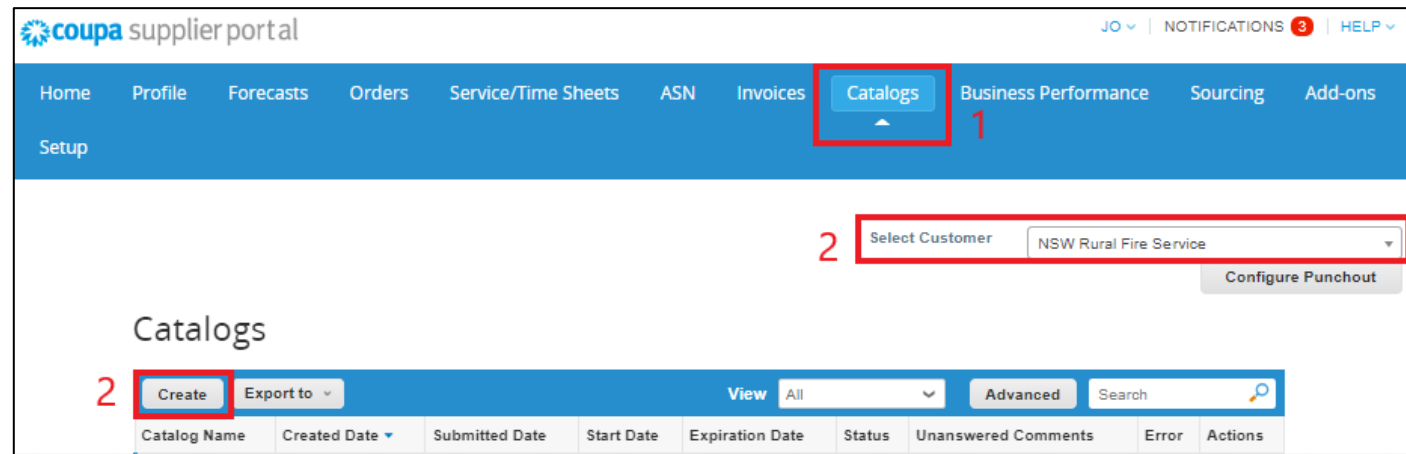
Invoices Status – Invoices can have the following statuses. What does the status mean ?

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

Catalogs 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



coupa supplier portal

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

Setup

Select Customer NSW Rural Fire Service **2** Configure Punchout

Catalogs

2 Create Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
--------------	--------------	----------------	------------	-----------------	--------	---------------------	-------	---------



Select Customer R28 Coupa Configure Punchout

Initech Catalog 3 Edit

Customer R28 Coupa

Catalog Name Initech Catalog 3

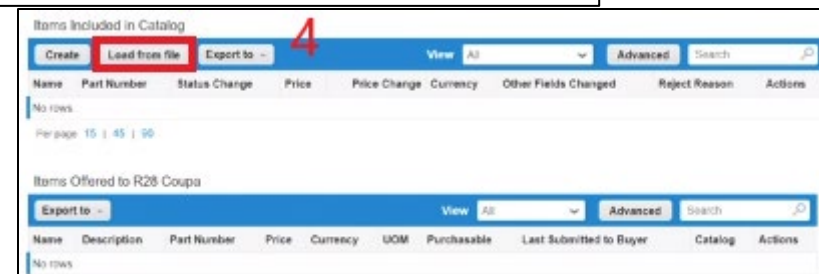
Status Draft

Start Date date when catalog prices become effective **3** enter the details into the fields

Expiration Date date when catalog prices become expire

Currency USD

Back



Items Included in Catalog

4 Create Load from file Export to View All Advanced Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
No rows								

Per page 15 | 45 | 90

Items Offered to R28 Coupa

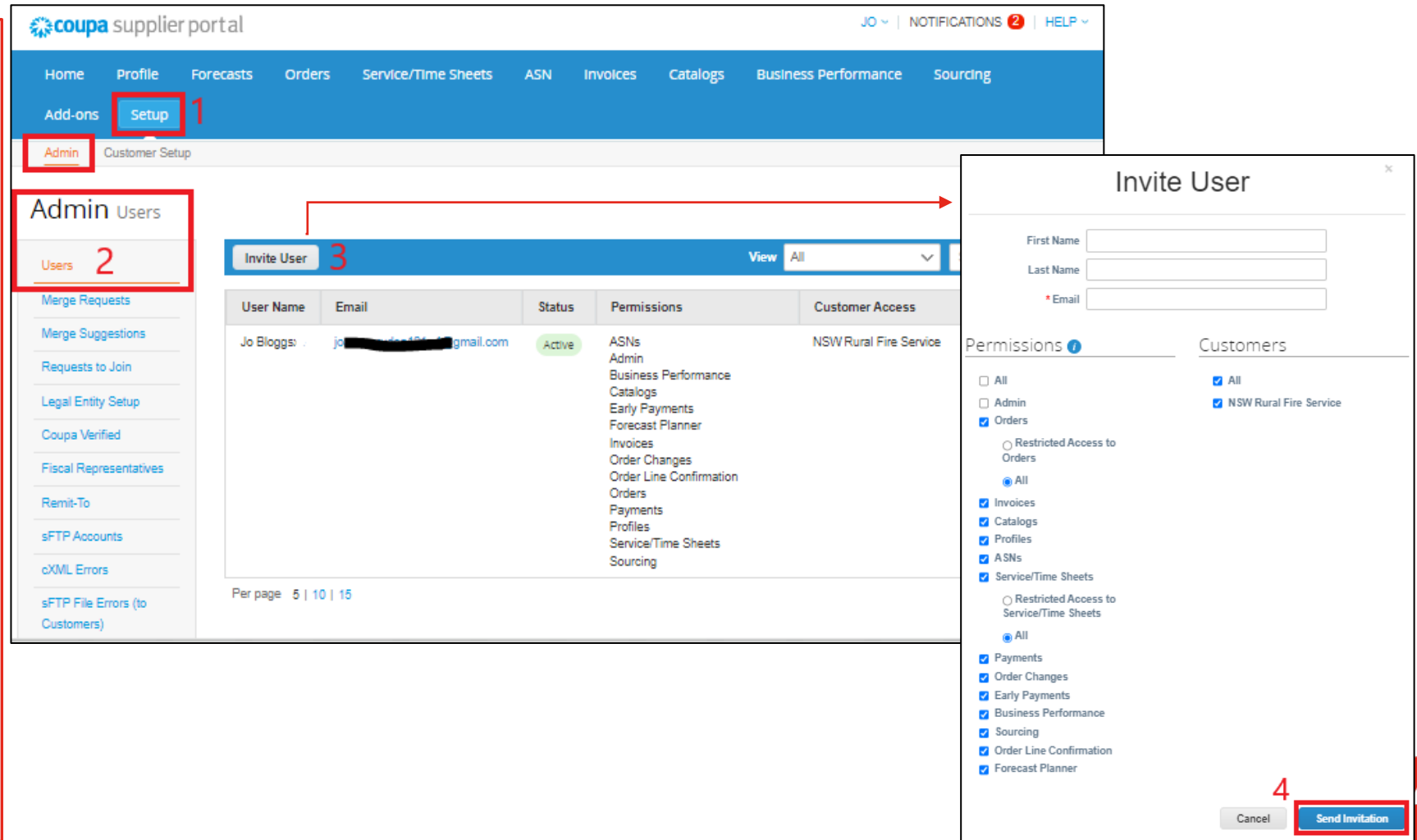
Export to View All Advanced Search

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
No rows									

SIM – Coupa Setup tab > Users

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



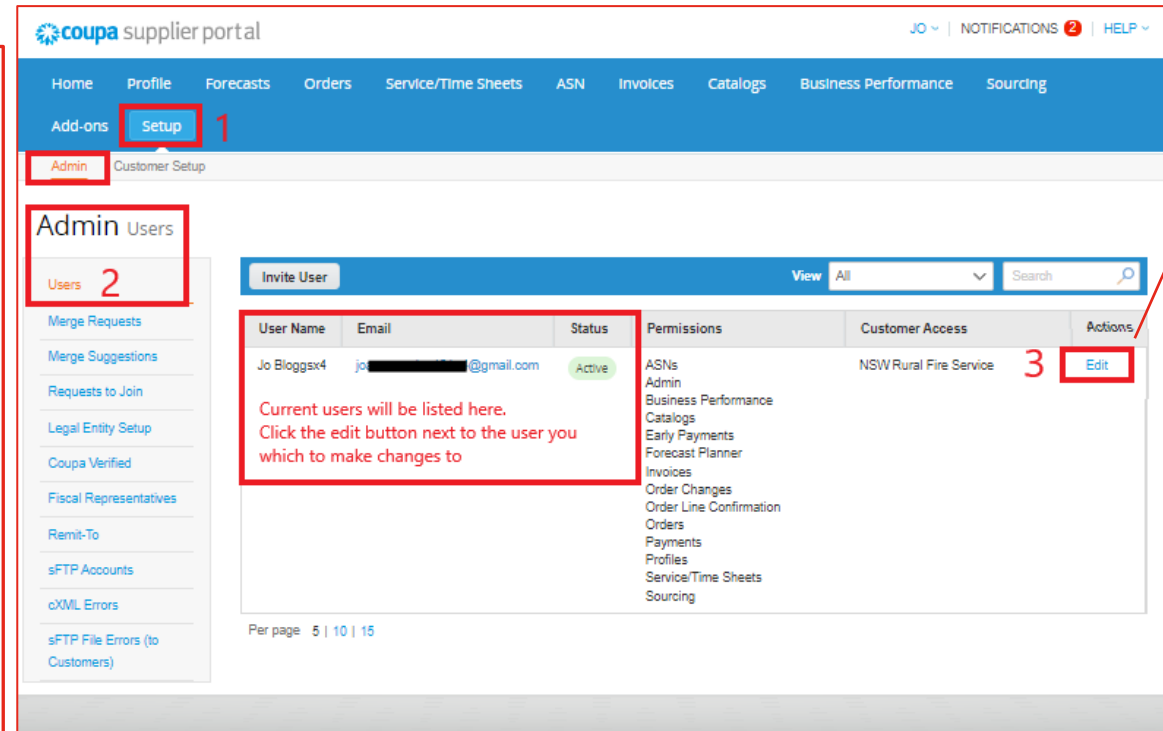
The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. The 'Setup' button is highlighted with a red box and labeled '1'. Below the navigation bar, the 'Admin' section is visible, with 'Users' selected and labeled '2'. The 'Invite User' button is highlighted with a red box and labeled '3'. The 'Invite User' dialog box is open, showing fields for 'First Name', 'Last Name', and 'Email'. The 'Permissions' section is checked for 'Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', and 'Service/Time Sheets'. The 'Customers' section is checked for 'All' and 'NSW Rural Fire Service'. The 'Send Invitation' button is highlighted with a red box and labeled '4'.

User Name	Email	Status	Permissions	Customer Access
Jo Bloggs	jo.bloggs@NSWRFS@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service

SIM – Coupa Setup tab > Edit

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



coupa supplier portal

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

Add-ons **Setup** 1

Admin Customer Setup

Admin Users

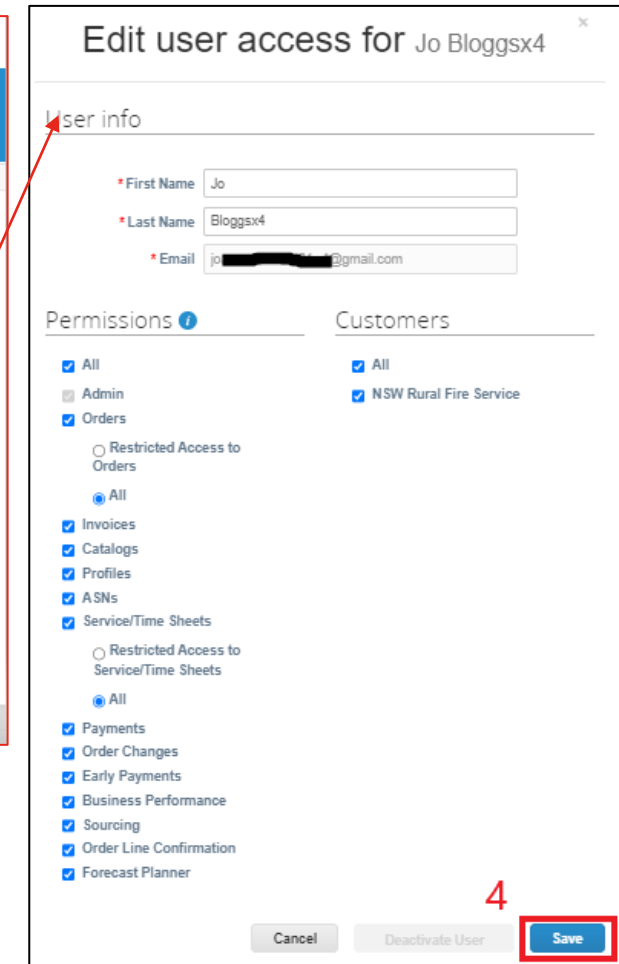
Users 2

Invite User View All Search

User Name	Email	Status	Permissions	Customer Access	Actions
Jo Bloggsx4	jo[REDACTED]@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service	3 Edit

Current users will be listed here.
Click the edit button next to the user you which to make changes to

Per page 5 | 10 | 15



Edit user access for Jo Bloggsx4

User info

* First Name Jo

* Last Name Bloggsx4

* Email jo[REDACTED]@gmail.com

Permissions Customers

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Order Line Confirmation

Forecast Planner

Cancel Deactivate User **4 Save**

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

