Create your Account and Invoice via Coupa Supplier Portal (CSP)

Create Coupa Supplier Account - *One time Setup*

Read instructions below and [Watch Video Tutorial - optional (Approximately 2 minutes)](#)

You can create an account by clicking on the 'Create your Account' from the Purchase order email.

Enter information in the mandatory fields, fields such as Business name, email address and name is pre-populated for you.

a) Password and confirm Password
b) Country
c) Tax registration . If you do not have a Tax registration / ID click on ' I do not have a Tax ID' > reason : N/A
d) Accept Privacy Policy and click on 'Create an Account'
e) Enter One time email verification which was sent to your email address.
f) Your contact information: Enter your business website if you have one. If not click on ' I do not have a website'
g) Country of Primary address > Already populated. Click next
h) All mandatory fields are populated. You can invite another user from your organization by entering their email address and click ' Send Invite'. Click ' next
i) Next few screens such as 'Customize your profile' , 'Highlight your diversity Credentials' 'Identify your Product Categories' do not have mandatory fields and you can click 'Skip for now'
j) Coupa Offers various types of registrations, please click ' Continue' under Registered Free
k) Coupa Supplier Account is now successfully created.

   Tip:

   Save the Coupa Supplier Portal site as a favorite for future access
   https://supplier.coupahost.com

Multi Factor Authentication (MFA) -*One Time Set-up*

MFA is introduced to add an extra layer of protection against frauds and to meet security standards.

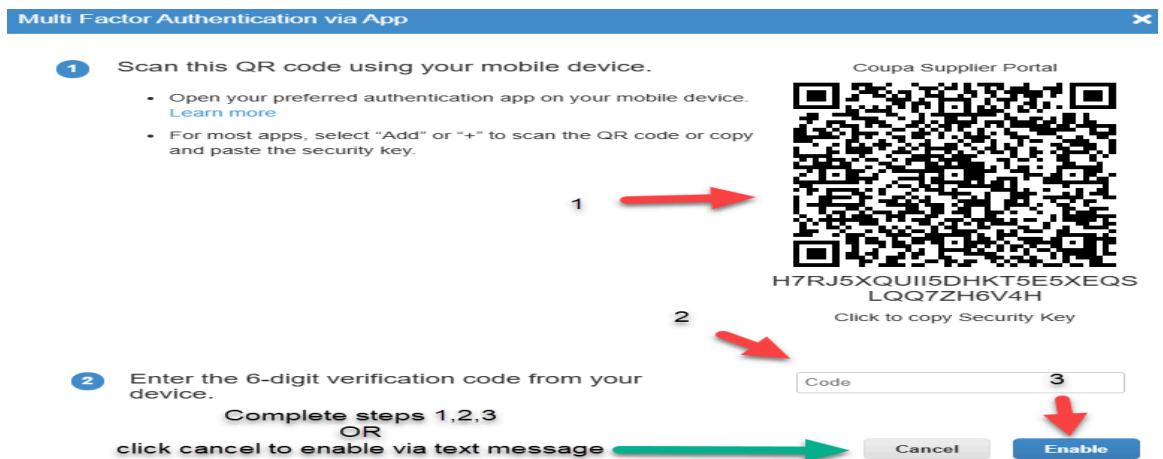**Navigation**: Hover over your name > Account Settings > Security & Multi Factor Authentication
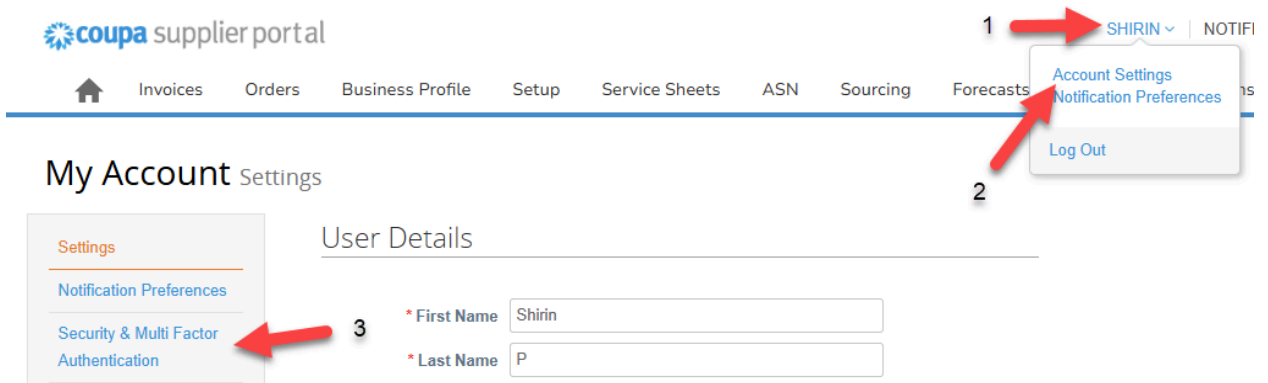
Two ways to enable MFA:

In Coupa you can enable MFA the following ways:
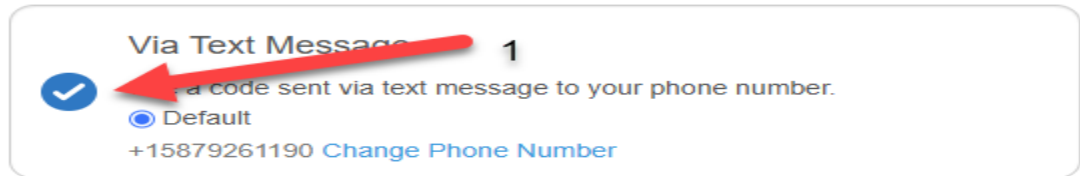
1. MFA via App

   Steps:

   QR code screen will appear and you can scan the QR code and enter the 6 digit verification code. Note: You can cancel or click 'x' on this screen to view the second option
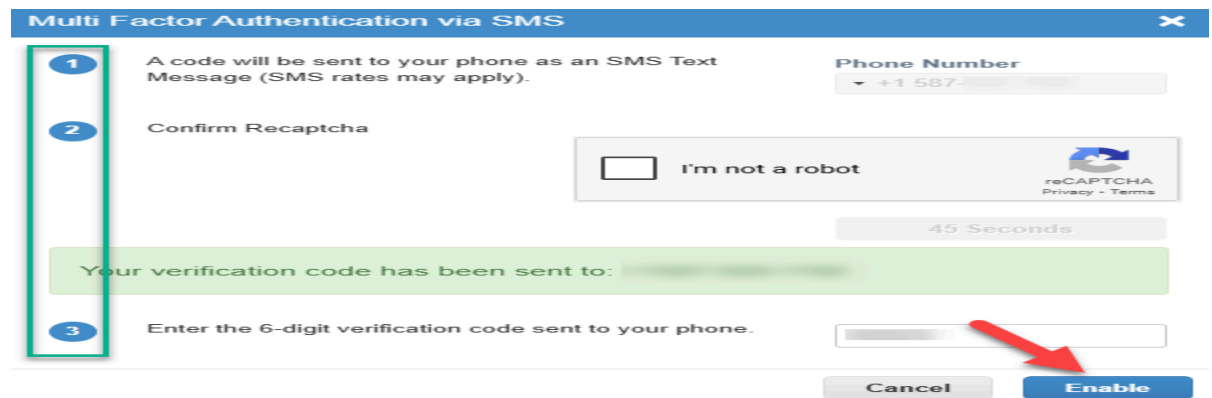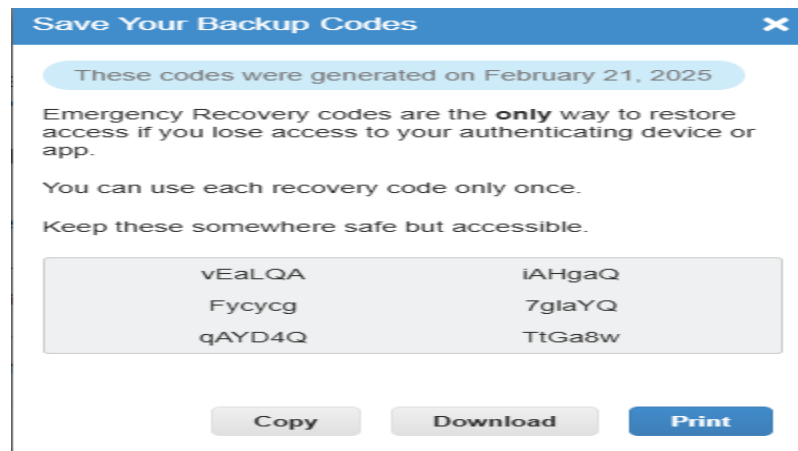
OR

2. Via Text message

Hover over Via Text Message > Click on the blue circle to activate this option.

Complete steps 1, 2 and 3 > Click enable.

Backup codes screen will appear.

Download or print your backup codes in case you lose your phone or delete the app. After saving 'x' the screen. Be prepared to enter new verification code when prompted any time you're viewing or modifying your financial account settings or log in.

You have now enabled MFA successfully.

Legal Entity : *One-time set-up*

Create ' Legal Entity' - One time Activity only and [Watch Video Tutorial (Less than 3 minutes)](#)

a) Click 'Setup' on the homepage
b) Click on 'Legal Entity Setup > click on 'Add legal Entity' button
c) Enter Legal Entity name and Country / Region > Click Continue
d) Enter address line 1, City and Postal code
e) Enter Tax ID or click on ' I don't have Tax ID number' > Click Save and Continue
f) Where do you want to receive payment> Payment type : select ' Address' from the drop down > Click 'Save and Continue' and 'Next'
g) Where do you ship goods from > Click ' Done'
h) Next Click 'Add now' and next screen click ' Save'

Important Notes:

Remit to Address or Banking Information entered here is not transmitted to the University of Alberta from the Coupa Supplier Portal

The University of Alberta can pay Canadian & US suppliers by electronic funds transfer (direct deposit), but does not obtain or manage supplier remit address or banking information through the Coupa Supplier Portal.

For changes to a remit-to address, EFT or payment information, please click [here](#) for the form.

<u>Note:</u>

- Tax ID is a mandatory field enter your Tax ID # here. And if you do not have a Tax ID Number enter 999999999
- Entering Banking information is not required.
- Cheque and EFT Payments are generated once a week on Wednesday morning. The Payment Information is updated overnight and available on Thursday morning
- The weekly pay cycle processes approved Invoices that are due up to and including the next paycycle date (the following Wednesday)

   If the invoice status is not "Approved" and payment is due, contact the requester listed on the purchase order to follow up.

Create Invoice in Coupa Supplier Portal

Create Invoice and [Watch Video Tutorial (3 minutes)](#)

Navigation:

Click 'Invoices' Tab > Click 'Create Invoice from PO Button" > Search PO # > Click on the yellow coins (under action) to create a new Invoice.

Step by Step:

Enter the information indicated below.

   a) Enter the invoice number
   b) Enter Invoice date
   c) Attach your PDF invoice or Supporting documents if applicable. For Non US and Canada suppliers please attach the wire information with each invoice
   d) Update Invoice lines (when invoice lines do not match the PO)
   ○ You can edit qty or pricing for your invoice for partial invoicing
   ○ You can click on X for partial invoice or deleting lines
   ○ Do not add lines, this is not supported
   ○ Add shipping and handling in Shipping Field
   e) Calculate and confirm total and GST
   f) Click 'Submit'

General Info

* Invoice #   test invoice   **A**   ✓
* Invoice Date   08/26/22   **B**
Payment Term   30
* Currency   USD
Status   Draft
Image Scan   [Choose File] No file chosen   **C**
Supplier Note
Attachments   Add File | URL | Text

From

* Supplier
Supplier GST/HST ID   999999999
* Invoice From Address   🔍
* Remit-To Address   🔍
* Ship From Address   🔍

Lines

☐ Line Level Taxation

	Type	Description	Qty **D**	UOM	Price **D**	
1	🛒	Gloves	1	Each	33.25	33.25

D ❌

PO Line   🔍 Clear
Contract
Period
Supplier Part Number   4703(QI)

➕ **Add Line** **D** ➕ Pick lines from Contract

Totals & Taxes

Shipping   **D**

GST   CA: GST - GS'   5.000 %   100.000
➕

Total GST   100.00
Net Total   2,000.00
Total   **2,100.00**

E   **f**

[Delete] [Cancel] [Save as Draft] [Calculate] [Submit]

Frequently Asked Questions

1. **How can I view the status of my invoice?**

   Click on the 'Invoices' tab and view 'Payment information'. (Ensure Customer "University of Alberta") is selected. You can also search by invoice number and export to excel if required.
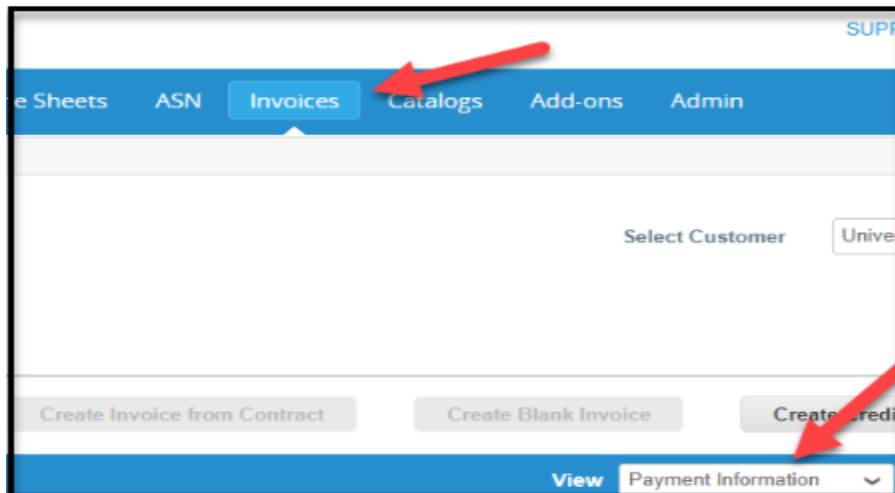
2. **How can I submit an invoice when the 'Create Invoice' button does not appear?**

   The 'Create Invoice' button is not available after a PO has been closed or cancelled and you are unable to submit your invoice via the Coupa Supplier Portal.

   In this scenario, please email your PDF invoice to procure@ualberta.ca with the subject line: "Unable to submit invoice for PO# UAxxxx via the Portal".

   Do not send any other invoices to this email address. They will not be accepted. This email can only be used to provide assistance when you are unable to submit your invoice via the Portal because the PO is closed or cancelled.

3. **Can I Invite or deactivate Users from my organization?**

   Yes, as an admin you can add and remove individuals. **Add Users :** Click Set up > Admin and click on Invite User . **Deactivate users** : Go to Setup> Admin> Users> Click Edit for the User you wish to deactivate> Click ' Deactivate User'. At this point you can also assign permissions to the users you are inviting.

   Note: Is it best to have at least two people with Admin access in case one person leaves or is unavailable.

4. **Can I add Shipping information on the Purchase Order via CSP?**

You can add shipping information by clicking on the order number e.g UAxxxxx. Click 'Add' next to the Shipment Tracking header. Enter ' Tracking number' and 'Carrier' information and save . Adding shipping details is not mandatory, however is helpful. Requester will receive email notification at the time shipment information is entered and a second notification on delivery of the order.

5. **How can I resolve disputed invoices?**

Click on the invoice that is disputed. You have two options:
Void, this will void the invoice Or 'Correct Invoice', the invoice is now in editable, you can correct the invoice and re-submit.

6. **How can I manage my email notifications?**
When you sign-up for the Coupa Supplier Portal, by default, you will receive emails for all Purchase Orders and when Invoices are approved and paid.
Click on your name (Top right corner) > notification preferences > Update your Email notification preference for orders and invoices