



# Supplier Enablement

- April-May, 2024

Presented by  
**Olymel Partners Support**



# Objective of the session

## Objective

Socialize the Corporate Purchasing department's **new service offering** and ensure your **understanding of the procurement changes** coming into effect shortly.

## Agenda

- **Introduction – New procurement process Indirect purchases**
- **New Coupa platform**
  - **Simplify our purchasing process**
  - **Improve collaboration with our suppliers**
  - **Optimize our ways of working**
- **Supplier Area**
- **Next steps & conclusion**

# Why do we need our ways of purchasing to change?

To improve our efficiency and performance and better meet our business needs.

Team structure  
and delivery  
model review

Purchasing  
process  
harmonization  
through Coupa

Policy and  
governance  
implementation

Supplier  
relation  
centralization



# Indirect Purchasing

Indirect purchases refer to the acquisition of goods and services that are not directly related to the production process\*. These purchases remain essential for the operation of the establishment. These purchases are often necessary to support operations, maintenance, management, and employee well-being, but they are not an integral part of the final product.

## Example of indirect purchase

### Building General Maintenance

- Water treatment operations services
- Minor plumbing works (toilet, sink, etc.)
- General electricity (light bulbs, fluorescent lights, etc.)
- Pumping services
- Small building repairs (window repair, painting jobs, etc.)
- Ground maintenance (snow removal, landscaping)

### Indirect Consumables

- Chemical product for water treatment
- PPE (Personal Protective Equipment): Gloves, helmets, ear protection, goggles, boots, uniforms, etc.
- Janitorial supplies (paper towels, soaps, cleaning products, etc.)
- Laboratory supplies
- Office supplies
- Sanitation supplies
- Ink for label printers
- Lockout/tagout, truck seals
- Two-way radio (walkie-talkie)
- Denaturing agent
- Production aid tools (scissors, knives, shovels, sieves, etc.)
- Rejection bins
- Pallets

### Other Indirect Purchases

- Professional expenses (financial, legal, HR)
- Consulting services
- Subscription and membership
- External labor
- Labor transportation (bus, taxi)
- Marketing and sales expenses
- External storage expenses
- Recruitment and hiring expenses
- Expenses for foreign workers
- Office furniture
- Energy
- Communication
- Short-term rental of rolling equipment (lift truck, etc.)
- IT expenses

# Capex Purchasing

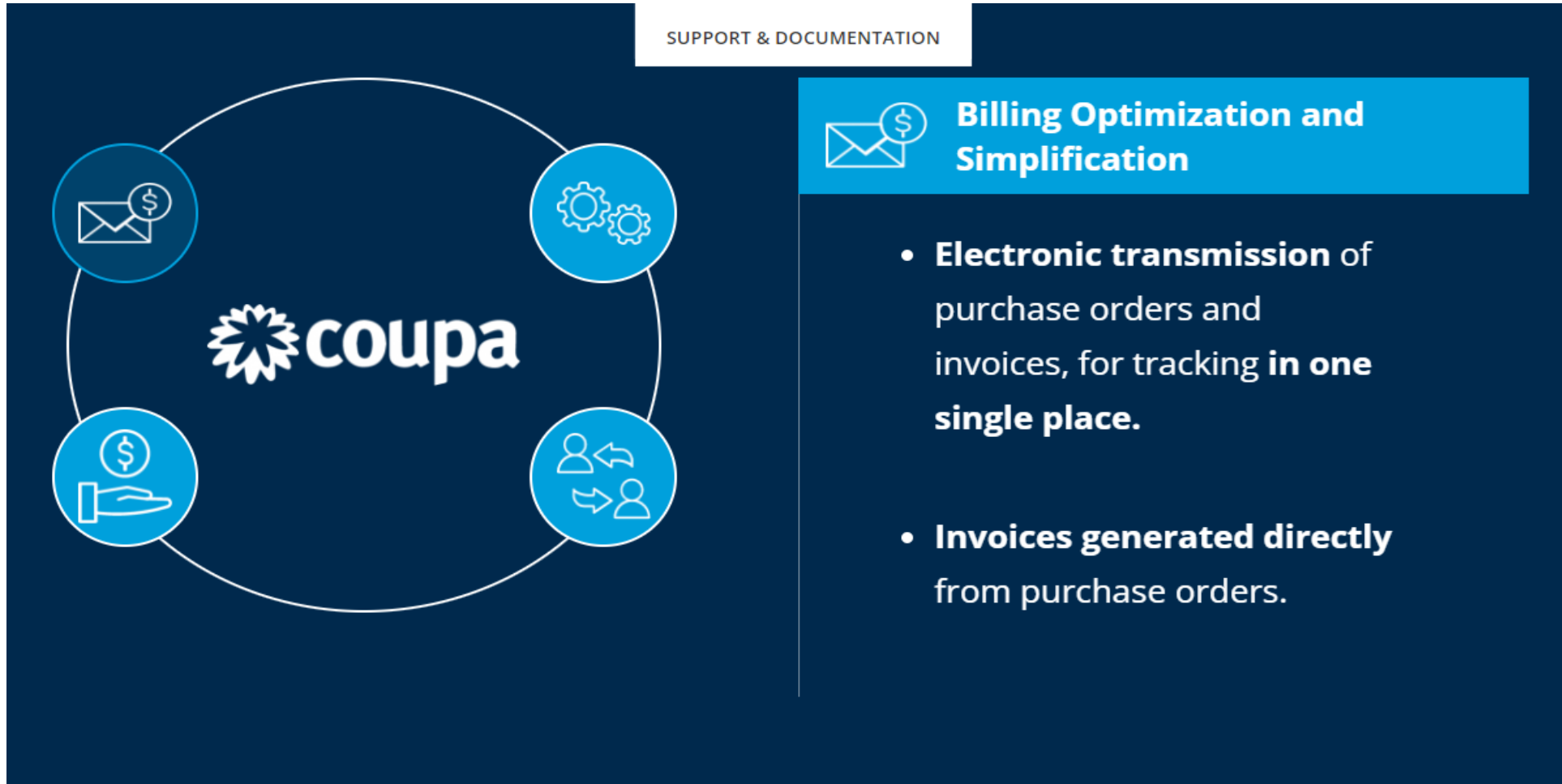
The major disbursement" is a form proposing expenses of a non-routine nature. The major disbursement includes, among other things, rentals of all kinds, acquisitions of fixed assets, and non-routine expenses.

## Example of Capex expenses

<u>Location</u>	<u>Assets</u>	<u>Major disbursement</u>
<ul style="list-style-type: none"><li>▪ Truck lease</li><li>▪ Car lease</li><li>▪ Mobile equipment lease</li></ul>	<ul style="list-style-type: none"><li>▪ Production equipment, kettle, smoker, laboratory</li><li>▪ Building construction (factory, barn, pigsty, shed, garage, shelter)</li><li>▪ Site improvement, leasehold improvement, land</li><li>▪ Forklift</li><li>▪ Rolling equipment (new and used)</li><li>▪ Parking and paving</li><li>▪ Storage and distribution equipment</li><li>▪ IT Equipment</li><li>▪ Software</li><li>▪ Office and cafeteria furniture</li><li>▪ Refrigeration equipment</li></ul>	<ul style="list-style-type: none"><li>▪ Roof, floor, wall, and compressor repairs</li><li>▪ Slaughter &amp; evisceration chains</li><li>▪ Interior remodeling of buildings</li></ul>

# New Coupa platform

Coupa offers many benefits for Olymel and its suppliers



[Coupa en bref - Olymel S.E.C.](#)

# New Coupa platform – How to exchange information

## Communication channels available with Coupa

- cXML
  - Information exchange between systems (Olymel Procurement and suppliers)
- CSP
  - Coupa Supplier Portal
- SAN
  - Supplier Actionable Notification
- Email transmission





# COUPA SUPPLIER TRAINING

April-May, 2024

Presented by  
**Olymel Partners Support**



Feeding the world



# AGENDA



- 1 Supplier Invitation and Registration on Coupa Supplier Portal (CSP)
- 2 Overview of CSP
- 3 User Management (Supplier Settings)
- 4 View and Acknowledge a Purchase Order (CSP)
- 5 Create and Manage Invoice
- 6 Invoice Creation via CSP (Header Level Taxation)
- 7 Invoice Creation via CSP (Line Level Taxation)
- 8 Credit Note Creation (CSP)
- 9 Invoice Dispute (CSP)

# AGENDA



**10** Supplier Actionable Notifications (SAN)

**11** Sourcing Event Participation

**12** Course Summary

**13** Q&A

# LEGEND



Please note that the following icons are used throughout this document to assist in your learning of new business processes:



**Key Note** - Key information to take note of and/or remember












**Tip** - Important tip or helpful information



# ICONS



Commonly Used Icons	
	Resolve
	Edit
	Delete
	Search
	Add Line Item
	Void
	Home
	Create Invoice
	Create Credit Note

# KEY TERMINOLOGY



Key Term	Description
Catalog Item	An item loaded into Coupa by Procurement with a negotiated price. These items are available for purchase by Requesters.
UoM	Unit of Measure
Currency	The item's currency for the listed price. Users see the price in their default currency.
Commodity	Category to classify spend.
Coupa Supplier Portal (CSP)	<p>A free online platform provided by Coupa for suppliers to manage their interactions and transactions with their customers who use Coupa.</p> <p>Upon registration, suppliers can:</p> <ul style="list-style-type: none"><li>• Receive purchase orders and send invoices</li><li>• Create and distribute customer-specific electronic catalogs</li><li>• Manage company profiles and remit-to information</li></ul>

# COURSE



Upon completion of this course, you will be able to:

- **Register on the Coupa Supplier Portal**
- **Get an overview about CSP Homepage**
- **Invite New Users and Manage Existing Users in CSP**
- **View and Acknowledge a received PO (CSP)**
- **Create Invoice from PO**
- **Add Header level taxes on invoice**
- **Add Line level taxes on invoice**
- **Create a Credit Note**
- **Resolve Invoice Disputes**
- **View and Respond to a PO Supplier Actionable Notifications (SAN)**
- **Participate and submit responses for a sourcing event**





# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



6. Enter the one-time verification code and click on **Next** button
7. Select the option “**No, continue creating a new account**”
8. Click on **Next** button

**Email Verification**

We sent a one-time verification code to aakashsomaiya+887@kpmg.com

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

**6**

**Next**

**Join an Existing Account?**

Provide any of the additional info to get better suggestions.

View existing accounts matching the email domain **kpmg.com**

**Business Name**

**Country/Region**

**Address Line 1**

**City**  **State**  **Postcode**

**Tax ID**  **DUNS Number**

**No, continue creating a new account**

**7**

**Next**

**8**

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



9. Click on the **Update Profile** hyperlink to update the minimum information required
10. Under Primary Address section, enter the appropriate information in the **Address Line 1** field
11. Enter the **City**
12. Enter the **State**
13. Enter the **Postal Code**
14. Select the **Country/Region** from the dropdown list
15. Enter the **Tax ID** field

The screenshot displays the registration interface for the Coupa Supplier Portal. It is divided into three main sections: "Opportunities for You", "Primary Address", and "Company Information".

- Opportunities for You:** A yellow banner at the top right contains a blue circle with the number "9" and a red-bordered "Update Profile" button. Below the banner, a lightbulb icon is next to the text "Add info about your products/services to get insights into your potential market opportunity with Coupa buyers".
- Primary Address:** This section contains several input fields:
  - "Address Line 1" is a long text field with a blue circle "10" and a red border.
  - "City" is a text field with a blue circle "11" and a red border.
  - "State" is a text field with a blue circle "12" and a red border.
  - "Postal Code" is a text field with a blue circle "13" and a red border.
  - "Country/Region" is a dropdown menu with a blue circle "14" and a red border.
- Company Information:** This section includes:
  - "Year Established": A text input field.
  - "Company Size": A dropdown menu.
  - "Number Of Employees": A text input field.
  - "Ownership Type": A dropdown menu.
  - "Industry": A dropdown menu with "Select an Option" as the current selection.
  - "PO Delivery Email": A text input field.
  - "Tax ID": A text input field with a blue circle "15" and a red border.
  - "DUNS": A text input field.

At the bottom of the "Company Information" section, there are two lock icons with the text "Secure Information - not published to your public profile".

# LESSON 1

## SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)





# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



Following are the steps to go through the supplier registration and invitation process for CSP

1. Click on the **Join Coupa Supplier Portal** button on the invitation received, the invitation will come through email.
2. Enter the password in the **Password** field (Mandatory)
3. Renter the password in the **Confirm Password** field (Mandatory)
4. **Check** the checkbox against the Privacy Policy and Terms of Use (Mandatory)
5. Click on **Create an Account** button

This is a screenshot of an email titled "Action Required - Olymel Registration Instructions". The email content includes a greeting "Hello Supplier 501.", a message about handling business spend electronically, and a note about the 48-hour registration deadline. At the bottom, there is a signature for Diana Ivanovic from Olymel and two buttons: "Join Coupa Supplier Portal" (highlighted with a red box and a blue circle with the number 1) and "Forward Invitation".This is a screenshot of the "Create an Account" registration form. It includes a welcome message and several input fields: "Business Name" (Supplier 501), "Email" (aakashsomaia+887@kpmg.com), "First Name" (Terry), and "Last Name" (Luis). The "Password" and "Confirm Password" fields are highlighted with red boxes and blue circles with the number 2. Below these fields is a checkbox for "I accept the Privacy Policy and the Terms of Use", which is checked and highlighted with a blue circle with the number 4. At the bottom, the "Create an Account" button is highlighted with a red box and a blue circle with the number 5.

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



16. Under Areas Served, select the appropriate Region(s)
17. Click on **Save changes** button

The screenshot shows the 'Areas Served' section of the COUPA Supplier Portal. It includes a title 'Areas Served' with an information icon, radio buttons for 'Global' and 'Regional' (with 'Regional' selected), a search box containing 'Alberta, Canada' with a red box around it and a blue circle '16' next to it, and a 'Save changes' button highlighted with a red box and a blue circle '17' next to it. Other buttons include 'Cancel', 'Save & Go to Next', and a second search box labeled 'No coverage in areas'.

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



18. Click on **Manage legal entities** hyperlink
19. Click on **Add Legal Entity** button
20. Enter the appropriate **Legal Entity Name** (Mandatory)
21. Select the **Country/Region** from the dropdown list (Mandatory)
22. Click on **Continue** button

Company Profile

- Environmental, Social, Governance & Diversity
- Risk & Compliance
- Financial Performance
- Ratings & References

Quick Links

- Manage payment information
- Manage legal entities**

Admin Legal Entity Setup

Legal Entity

Let's get your company setup for electronic invoicing!  
We'll walk you through what's needed & keep it as short as possible.

The first thing you'll need to do is add a legal entity.

Please note, if you are a European Company, or have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-Invoicing Setup to continue.

**Add Legal Entity**

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.

**20**

\* Legal Entity Name

**21**

\* 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.

**22**

Cancel **Continue**



# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



23. Click on **Save & Continue** button

### Miscellaneous Information

1 2 3 4

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

PST/QST Registration Number

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



24. Enter the **Address Line 1** field (Mandatory)
25. Enter the **City** (Mandatory)
26. Select the **State** from the dropdown list (Mandatory)
27. Enter the **Postal Code** (Mandatory)

Which customers do you want to see this?

All

Olymet

What address do you invoice from?

24 \*Address Line 1  +

25 \*City

State  26

27 \*Postal Code

Country/Region Canada

Use this address for Remit-To

Use this for Ship From address

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



28. Enter the **VAT ID** field or checkmark the checkbox “**I don’t have a VAT/GST Number**” (Mandatory)

29. Click on **Save & Continue** button



Tax IDs will be stored in Olymei's ERP and the value entered here will not impact payment against invoices submitted

A screenshot of a web form titled "What is your Tax ID?". It features a dropdown menu for "Country/Region" set to "Canada". Below it is a text input field for "VAT ID" with a red box around the label and a blue circle with the number "28" next to it. A checkbox labeled "I don't have a VAT/GST Number" is located below the input field.A screenshot of a web form titled "Miscellaneous". It contains an "Invoice From Code" text input field and a "Preferred Language" dropdown menu set to "English (Canada)". At the bottom right, there are two buttons: a grey "Cancel" button and a blue "Save & Continue" button with a red border and a blue circle with the number "29" next to it.

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



30. Select the **Payment Type** from the dropdown list (We have selected Address) (Mandatory)

31. Click on **Save & Continue** button



Remittance information will be maintained in Olymel's ERP system and the Remit To Address values entered in CSP will not impact payment against invoices submitted

The screenshot shows a web form titled "Where do you want to receive payment?". At the top right of the form is a close button (X). Below the title is a progress indicator with four steps: 1, 2, 3, and 4. Step 3 is highlighted in orange. A blue circle with the number 30 is positioned above the form. The form contains a dropdown menu labeled "Payment Type" with "Address" selected; this dropdown is highlighted with a red box. Below this is a section titled "What is your Remit-To Address?" with a horizontal line. Underneath, the following information is displayed: Address Line 1: 123 Park Street; City: Anjou; State: AB; Postal Code: 45699; Country/Region: Canada. A blue circle with the number 31 is positioned to the right of this information. At the bottom right of the form are two buttons: "Cancel" and "Save & Continue", with the latter highlighted by a red box.

# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



- 32. Verify the **Remit To Address** details
- 33. Click on **Next** button
- 34. Verify the address details
- 35. Click on **Done** button

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
	123 Park Street Anjou AB 45699 Canada	Active	<span>Manage</span>

Deactivate Legal Entity Cancel Next

33

Where do you ship goods from?

1 2 3 4

Many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
123 Park Street Anjou AB 45699 Canada	Active	<span>Manage</span>

Deactivate Legal Entity Done

34

35



# SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



36. You will be at the **Setup Complete** page

37. Click on **Done** button

The screenshot shows a web interface for the "Setup Complete" page. At the top left, a blue circle with the number "36" is positioned next to the "Setup Complete" title, which is enclosed in a red rectangular box. Below the title is a progress indicator with four numbered steps: "1", "2", "3", and "4", where "4" is highlighted in orange. A large green checkmark is centered on the page, followed by the text "Congratulations!" and a smaller line of text: "This legal entity can now be used on new invoices." Below this is a yellow information box with the text: "To get paid - Most customers require that you send them this payment info in addition to providing it on the invoice. ⓘ" and two bullet points: "• Click on the Profile Tab to see if your customer has a form that collects payment information." and "• Otherwise, you'll have to send it to them through another channel." At the bottom right, a blue circle with the number "37" is placed above a "Done" button, which is highlighted with a red rectangular box. Other buttons at the bottom include "Go to Orders", "Go to Invoices", and "Return to Admin".

# LESSON 2

## OVERVIEW OF CSP



# CSP HOMEPAGE



Upon logging into CSP, navigate to the homepage to explore the various accessible sections.

1. The **Home** tab offers you the opportunity to view and enhance your public profile, as well as access the list of customers you are connected with.
2. On the **Profile** provides guidance on how to create and handle your profile, which includes managing **addresses, legal entities, and contacts**.
3. The **Orders** Tab allows you to view and access the purchase orders
4. The **Invoices** tab provides the ability to create and manage invoices.
5. The **Setup** tab offers options to manage users, remit-to-addresses, and merge requests.
6. The **Recent Activity** section enables you to stay up-to-date with the latest status of your Purchase Orders and Invoices.
7. You can click on **View Profile** hyperlink to view and edit your profile details

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar is blue and contains the following tabs: Home (1), Profile (2), Forecasts, Orders (3), Service/Time Sheets, ASN, Invoices (4), Catalogues, Payments, and Business Performance. Below this is a secondary navigation bar with Sourcing, Add-ons, and Setup (5). The main content area is titled 'SUPPLIER' and shows a profile progress of 18% and a 'View Profile' link (7). Below this is a 'Recent Activity' section (6) with a table of transactions:

Transaction ID	Status	Date
Invoice # inv713	Approved	Mar 11
Olymel • 1500.0 • CAD • Not paid • Due 36 days ago		
Order # C000000713	Issued	Mar 11
Olymel • 1500.0 • CAD • Not Invoiced		
Order # C000000712	Issued	Mar 11
Olymel • 750.0 • CAD • Not Invoiced		

On the right side, there is an 'Announcements' section with the text 'No Announcements'.



Only the above highlighted sections will be used for Olymel

# NOTIFICATIONS



1. Hover your cursor on the **NOTIFICATIONS** section
2. Click on **See all Notifications** hyperlink. You will be able to view all notifications sent to you as well as manage your notification preferences from this page

The screenshot shows the Coupa Supplier Portal interface. At the top right, there is a navigation bar with 'SUPPLIER', 'NOTIFICATIONS 4', and 'HELP'. The 'NOTIFICATIONS 4' link is highlighted with a red box and a blue circle containing the number '1'. Below this, a dropdown menu is visible, listing several notifications: 'Profile update reminder is received', 'Complete Your Profile to Get Paid Faster and Get Discovered', 'Invoice approved', 'New PO received', and 'New PO C000000713 for \$1,500.00 issued by Olymel.'. At the bottom of the dropdown menu, the 'See all Notifications' link is highlighted with a red box and a blue circle containing the number '2'. The main content area shows a 'SUPPLIER' profile with a progress bar at 18% and a 'View Profile' link.



Please use the Chat with Coupa Support option for any technical support



# LESSON 3

## USER MANAGEMENT (SUPPLIER SETTINGS)





# USER MANAGEMENT – INVITING A NEW USER



The supplier portal allows you to invite more users within your organization to join the CSP.

1. To invite users to your CSP account, click on the **Setup** tab
2. To invite a new user, go to the **Users** section and click on the "Invite User" button.

A new windows pops up

3. Enter the user's information (**Name and email address**) (Mandatory)
4. Then, select which **permissions** the user should be able to **access** (in this case **permissions** mean "**modules access**")
5. Select which **customers** the user should be able to access.
6. Click on **Send Invitation**. The employee receives an email notification right away, with a link to register.

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'Setup' tab is highlighted with a red box and a circled '1'. Below it, the 'Admin Users' section is visible, with the 'Invite User' button highlighted by a red box and a circled '2'. A modal window titled 'Invite User' is open, showing input fields for 'First Name', 'Last Name', and 'Email' (3). The 'Permissions' section (4) lists various modules with checkboxes, and the 'Customers' section (5) shows 'Olymel' selected. At the bottom right of the modal, the 'Send Invitation' button is highlighted with a red box and a circled '6'.

User name	Email	Status	Permissions	Customer Access	Actions
SUPPLIER SUPPLIER	olymelvend+250@gmail.com	Active	ASNs Admin Business Performance Catalogues Forecast Planner	Olymel	Edit



The new user will appear only once they accepted the invitation

# USER MANAGEMENT – MANAGING EXISTING USER



Management of existing users takes place in the same module (**Setup > Users**).

1. If you need to manage users, simply click on "**Edit**" to access the user management options.

A new windows pops up

2. By accessing user management, you can edit **user information**, change the **permissions** granted to them, and modify the **customers** they are linked to.

3. Remember to click on "**Save**" to apply any changes you have made.

4. If needed, you can **deactivate** a specific user by selecting **Deactivate User**.



Please note that the system requires a minimum of 2 active users to be able to deactivate one of them. Also, if there is only one user in the CSP, it cannot be deactivated.

User name	Email	Status	Permissions	Customer Access	Actions
Catalog User	olymelvendor+87@gmail.com	Active	Catalogues	Olymel	Edit
Supplier	olymelvendor@gmail.com	Active	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Olymel	Edit

### Edit user access for Catalog User

User info

First Name: Catalog  
Last Name: User  
Email: olymelvendor+87@gmail.com

Permissions

Customers

- All
- Olymel

Other permissions: All, Admin, Orders, Restricted Access to Orders, Invoices, Catalogues, Profiles, ASNs, Service/Time Sheets, Restricted Access to Service/Timesheets, Payments, Order Changes, Early Payments, Business Performance, Sourcing, Order Line Confirmation, Forecast Planner.

Buttons: Cancel, Deactivate User, Save

1

2

4

3

# USER MANAGEMENT - MERGE REQUESTS



It is possible for your company to have multiple accounts/profiles in the CSP, especially if multiple users from your company registered or were invited with different email addresses.

1. Click on **Setup** section for Merge Request if your company have more than one account/profile in the CSP
2. Click on **Merge Requests** hyperlink
3. Enter the email id you want to merge
4. Click on **Request Merge** button
5. Please note that account **Merge Suggestions** are based on the email domain. In other words, the system automatically suggests merging all users with a particular email domain, such as @example.com



Once an account is merged it cannot be unmerged



Note that accounts with the same email address will be merged automatically, regardless of which invite message was used to create the account, as long as both invites were sent to the same email address.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Setup' highlighted (1). Below it, the 'Admin Merge Requests' section is visible. On the left sidebar, 'Merge Requests' (2) and 'Merge Suggestions' (5) are highlighted. The main content area features an 'Initiate Merge Request' form with an email input field containing 'coupa@coupamail.edu' (3) and a 'Request Merge' button (4). A warning message is displayed below the form: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. Learn more about merging accounts.'

# USER MANAGEMENT - MERGE REQUESTS



- To select an account as the parent account, go to the **Account Owner** section and choose the account you want to use. Then, add a note to the account. (Mandatory)
- Click on **Send Request**



Merge request will be sent to the other supplier citing the owner once the accounts are merged

The screenshot displays the 'Request Account Merge' interface in the Coupa Supplier Portal. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The main content area is titled 'Request Account Merge' and contains the following elements:

- My Account:** A list of items including 'My users', 'My customers', 'My payment information', and 'My public profile'.
- Their Account:** A list of items including 'Their users', 'Their customers', 'Their payment information', and 'Their public profile'.
- Merged Account:** A summary section titled 'As the account owner, I will administer' containing 'All combined users', 'All combined customers', and 'All combined payment information'. Below this, it lists 'They will administer only' (Their users, Their customers, Their payment information) and 'The merged account will use' (My public profile).
- Account Owner Selection:** A radio button group where 'My Account' is selected. A red box highlights this section, and a blue circle with the number '6' is placed next to it.
- Note For Recipient:** A text area containing the note: 'Requesting to merge supplier 2 account and make supplier 1 as owner'.
- reCAPTCHA:** A checkbox labeled 'I'm not a robot' with a green checkmark.
- Disclaimer:** A warning icon followed by text: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.'
- Buttons:** 'Cancel' and 'Send Request' buttons at the bottom. A red box highlights the 'Send Request' button, and a blue circle with the number '7' is placed next to it.

# LESSON 4

## VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)



# VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)



In order to access the purchase order(PO), log in the **CSP** by following the below mentioned steps

1. Enter your **Email** and **Password** and click on **Login** button (Mandatory)
2. By clicking on the notification under **NOTIFICATIONS** section, you will directly land on the order to **review** and **acknowledge** it
3. You can also access all Orders by clicking on the **Orders** tab.

A screenshot of the login page. The word "Login" is at the top left. A blue circle with the number "1" is next to it. Below the title are two input fields: "\* Email" and "\* Password". A blue link "Forgot your password?" is below the password field. At the bottom is a blue "Login" button. A red box highlights the entire login form area.

A screenshot of the Coupa Supplier Portal. The top navigation bar includes "Home", "Profile", "Forecasts", "Orders" (highlighted with a red box and a blue circle with "3"), "Service/Time Sheets", "ASN", "Invoices", "Catalogues", and "Payments". Below the navigation bar is a "SUPPLIER" profile section with a "SU" icon, "Profile Progress 18%", and "Last Updated: about 1 month ago | View Profile". On the right, a "NOTIFICATIONS 4" dropdown menu is open, showing three notifications: "Profile update reminder is received", "Invoice approved", and "New PO received" (highlighted with a red box and a blue circle with "2"). A "See all Notifications" link is at the bottom of the dropdown. The top right corner has "SUPPLIER", "NOTIFICATIONS 4", and "HELP" links.



# VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)



4. Search for the right order by entering the **PO#** in the **Search** field
5. Click on the **PO number** to view the PO
6. Acknowledge the purchase order by checking the checkbox next to **Acknowledged** field



Order Acknowledgement only means a confirmation that a Supplier has received the Order

Purchase Orders

Select Customer: Olymel

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	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C00000321	2024-01-04	Issued	None	10 Each of Item 1	No	1,100.00 CAD		

### Purchase Order #C000000299

Order acknowledged

#### General Info

Status: Issued - Sent via Email

Order Date: 12/20/23

Revision Date: 12/20/23

Requester: Ankit Singh

Email: ankitsingh@olymel.com

Payment Term: 20MS

Attachments: None

**Acknowledged**

Assigned to: Select

#### Shipping

Ship-To Address: 168 RUE LAGUE  
ANGE-GARDIEN - USINE, QC J0E 1E0  
Canada  
Location Code: 1105  
Attn: 450 293-3694

Terms: None

#### Shipment Tracking

No shipment tracking.

# PAYMENT AGREEMENT ON PURCHASE ORDER



Below are the steps to view a Payment Agreement on a Purchase Order

1. Enter your **Email** and **Password** and click on **Login** button (Mandatory)
2. Click on the **Orders** section
3. Click on the **PO Number** hyperlink to view the purchase order

**Login** 1

\* Email

\* Password

[Forgot your password?](#)

**Login**

**coupa** supplier portal SUPPLIER ▾ | NOTIFICATIONS 4 | HELP ▾

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Payments Business Performance

Sourcing Add-ons Setup

### 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 ▾ 3 View Orders not invoiced ▾ Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
<a href="#">C000000366</a>	2024-01-12	Issued	None	7 Each of New Item 1	No	700.00 CAD		

# PAYMENT AGREEMENT ON PURCHASE ORDER



4. You will be able to view the Payment Agreements details on the purchase order
5. Click on the **Create Invoice** button\*
6. Please follow the steps shown in lesson 5 to create an invoice



\* When there is a Payment Agreement on a purchase order, irrespective of the amount, always invoice in full, when the service is fully delivered, otherwise the invoice will be rejected and disputed.



\*A dispute process will be initiated if an adjusted invoice is sent

Purchase Order #C000000366

### General Info

Status: Issued - Sent via Email  
Order Date: 2024-01-12  
Revision Date: 2024-01-12  
Requester: Ankit Singh  
Email: ankitsingh@olymel.com  
Payment Term: 20MS  
Attachments: None  
Acknowledged:   
Assigned to:

### Shipping

Ship-To Address: 168 RUE LAGUE  
ANGE-GARDIEN - USINE, QC J0E 1E0  
Canada  
Location Code: 1105  
Attn: 450 293-3694  
Terms: None

### Shipment Tracking

No shipment tracking. [Add](#)

### Payment Agreements

Due Date	Terms	Note	Amount
None	None	None	100.00 CAD 14.29% of Total

Prepayments Total: 14.29% 100.00 CAD  
Retainages Total: 0.00% 0.00 CAD

### Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	New Item 1	7	Each	100.00	700.00	0.00

Supplier Part Number: None | Manufacturer Name: None | Manufacturer Part Number: None

Per page 15 | 45 | 90

Total CAD 700.00

**Create Invoice** Save Print View

4

5

# LESSON 5

## CREATE AND MANAGE INVOICE



# CREATE INVOICE FROM PO







1. To Create invoices based on PO, click on **Orders** section
2. The **Select Customer** field will show you the list of your customers. Select Olymel from the dropdown list (This is an optional step in case you are catering to multiple customers via CSP)
3. To flip a PO into an Invoice, simply click on the yellow stack of coins create invoice icon (📄💰)

The screenshot shows the Coupa Supplier Portal navigation menu. The 'Orders' link is highlighted with a red box and a blue circle containing the number '1'. Below the main menu, there is a 'Select Customer' dropdown menu with 'Olymel' selected, also highlighted with a red box and a blue circle containing the number '2'.

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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C000000274	2023-12-07	Issued	None	4 Acre of Item 1	No	400.00 CAD		
C000000273	2023-12-06	Issued	None	12 Each of Markers	No	12,000.00 CAD		
C000000272	2023-12-06	Issued	None	12 Each of Markers	No	12,000.00 CAD		
C000000271	2023-12-06	Issued	None	10 Each of Router 5 Each of Router 2.0	No	1,750.00 CAD		

# CREATE INVOICE FROM PO



4. For **Invoice #** field, enter the invoice number (Mandatory)
5. Enter the **Invoice Date** (Mandatory)
6. **Payment Term** gets defaulted from the PO (Mandatory)
7. **Currency** gets defaulted from the PO
8. **Shipping Term** gets defaulted from the PO
9. For **Image Scan** field, upload the legal invoice copy supporting documents (Mandatory)
10. Please upload the supporting documents in the **Attachments** field
11. Click on the **magnifying glass icon** to select the address for **Invoice From Address**, **Remit-To Address** and **Ship From Address** fields (Mandatory)

**General Info**

**From**

**4** \* Invoice #

**5** \* Invoice Date 2024-01-04

Payment Term 20MS **6**

**7** \* Currency CAD

**8** Status Draft

Shipping Term

**9** Image Scan Choose File No file chosen

Supplier Note

**10** Attachments Add File | URL | Text

Exchange Rate

\* Supplier Supplier ABC123

Supplier GST/HST ID 999999999RT9999

**11** \* Invoice From Address Supplier ABC123  
CA  
CA, 001  
Canada

\* Remit-To Address Supplier ABC123  
CA  
CA, 001  
Canada

\* Ship From Address Supplier ABC123  
CA  
CA, 001  
Canada



Please note that the Remit To Address entered here will not impact the payments made to invoices



If the Currency and Shipping Term fields get defaulted, please do not change the values



Invoice number cannot contain more than 16 characters otherwise this will lead to an integration error



# CREATE INVOICE FROM PO



12. Under Lines section, for **Type** Qty you have the option to update the **Description**, **Qty**, **UOM** and **Price** field as applicable
13. For **Type** Amt, you have the option to update the **Description** and **Price** fields as applicable
14. To add **Header Level** taxes, please refer to lesson 6
15. To add **Line Level** taxes, please refer to lesson 7
16. At the pop-up, click on **Send Invoice** button
17. You will see a message stating “**invoice is pending approval**”



Please select the Type as Qty for quantity based lines. For amount based lines, please select the Type as Amt

Lines

Type	Description	Qty	UOM	Price	
Qty	Pen 90	15	Each	10.00	12 150.00
Amt	Services			500.00	13 500.00

Are You Ready to Send?

You're about to send an invoice to Olymel for a total amount of 12,600.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

16

Continue Editing Send Invoice

invoice #Invoice 101 is pending approval

17

# CREATE INVOICE FROM PO – INVOICE



Here we will see another way to create invoices from PO

1. Click on **Invoices** section
2. Click on the **Create Invoice from PO** button.
3. You can click on **Create Invoice** button
4. Follow the steps mentioned in lesson 5

**coupa** supplier portal

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogues

Sourcing Add-ons Setup

**Invoices** Invoices Lines Payment Receipts Advanced

Select Customer

## 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 Invoices list page}

Create Invoices ⓘ

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

## 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 All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C000000274	2023-12-07	Issued	None	4 Acre of Item 1	No	400.00 CAD		
C000000273	2023-12-06	Issued	None	12 Each of Markers	No	12,000.00 CAD		

# LESSON 6

## INVOICE CREATION VIA CSP(HEADER LEVEL TAXATION)



# INVOICE CREATION VIA CSP (HEADER LEVEL TAXATION)



You can enter **Header Level Taxes** by following the mentioned steps

1. Scroll down to the **Totals & Taxes** section of the invoice
2. Enter the **Shipping (2a)** , **Handling (2b)** and **Misc (2c)** charges if applicable
3. To enter tax at **Invoice Header**, choose the tax code from the dropdown list of **Tax** field
4. For e.g. to enter tax for Québec, select the tax code as **CA: QC – TPS – GST – 5.0%** and **CA: QC – TVQ – QST – 9.975%** from the dropdown list
5. **Tax Rate** will get defaulted from the tax code chosen
6. **Tax Amount** gets auto calculated based on the tax code chosen
7. Click on the **green '+'** icon to enter the second tax line if required
8. Click on **Calculate** to obtain the recalculated invoice amount.
9. The **Total Tax** field will display the total tax calculated on the invoice
10. The **Net Total** field will display the Line and summary charges total
11. The **Total** field will display the cumulative sum of Total Tax and Net Total
12. Click on **Submit** button to submit the invoice created

Please do not modify the Tax Rate and Tax Amount details

You will not be allowed to enter Line level and Header level taxes together on an invoice

Tax codes entered at header level will calculate tax on the entire invoice including line total and summary charge total

Please do not enter taxes in the shipping, handling and misc tax fields for header level taxation

1 **Totals & Taxes**

2a Shipping 10

2b Handling 20

2c Misc 30

3 Tax

4 CA: QC - TVQ 9.975 75.81

5 CA: QC - TPS 5.000 38.00

6

7

8

9 Total Tax 113.81

10 Net Total 760.00

11 Total 873.81

12 Calculate Submit

# LESSON 7

## INVOICE CREATION VIA CSP(LINE LEVEL TAXATION)




# INVOICE CREATION VIA CSP (LINE LEVEL TAXATION)



You can enter **Line Level Taxes** by following the mentioned steps

1. If there are multiple lines in the PO and you want to put line level taxes, checkmark the **Line Level Taxation** checkbox
2. To enter tax for Québec, select the **Tax Description** as **CA: QC - TPS - GST - 5.0%** from the dropdown list
3. **Tax Rate** gets defaulted based on the tax code chosen in Tax Description field
4. **Tax Amount** gets auto calculated based on the tax code and tax rate
5. Click on the green '+' icon to enter the second tax line if required
6. To enter tax for Québec, select the tax description as **CA: QC - TVQ - QST - 9.975%** from the dropdown list

 **Please do not modify the Tax Rate and Tax Amount details**

 **You will not be allowed to enter Line level and Header level taxes together on an invoice**

Lines 1  Line Level Taxation

Type	Description	Qty	UOM	Price	
	Markers	12	Each	1,000.00	12,000.00

PO Line: C000000273-1 Clear    Service/Time Sheet Line: None    Contract:     Credit Line: None

Supplier Part Number:     Billing: C100-1108-COST CENTER-12030020-65100020

Taxes

Tax Description	Tax Rate	Tax Amount	
CA: QC - TPS - GST -	5.0	600.00	

Taxes

Tax Description	Tax Rate	Tax Amount	
CA: QC - TPS - GST -	5.0	600.00	
CA: QC - TVQ - QST -	9.975	1,197.00	

INVOICE CREATION VIA CSP

# INVOICE CREATION VIA CSP (LINE LEVEL TAXATION)



7. Enter the **Shipping (7a)**, **Handling (7b)** and **Misc (7c)** charges if applicable
8. To enter tax rate (%) at **Shipping (8a)** / **Handling (8b)** / **Misc (8c)**, select the tax code from the dropdown list if applicable\*
9. **Tax Rate** and **Tax Amount** gets defaulted based on the Tax Code selected
10. Click on the green '+' icon to enter second tax line if required
11. Click on **Calculate** button
12. The **Total Tax** field will display the total tax calculated on the invoice
13. The **Net Total** field will display the Line and other charges total
14. The **Total** field will display the cumulative sum of Total Tax and Net Total
15. Click on **Submit** button to submit the invoice created



\*Please enter Shipping / Handling / Misc charges tax amounts in the tax fields highlighted for line level taxation

**Totals & Taxes**

Lines Net Total 700.00

7a Shipping 10

8a Tax CA: AB - TPS - 5.0 % 0.50

10 +

7b Handling 20

8b Tax CA: AB - TPS - 5.0 % 1.00

+ 10

7c Misc 30

8c Tax CA: AB - TPS - 5.0 % 1.50

+ 10

12 Total Tax 107.83

13 Net Total 760.00

14 Total 867.83

11 Calculate 15 Submit

Delete Cancel Save as Draft

# LESSON 8

## CREDIT NOTE CREATION (CSP)





# CREDIT NOTE CREATION (CSP)



Credit Notes can be created in two ways within CSP:

1. **Resolve Issue for Invoice number:** For example, resolve a problem related with goods or services for which an invoice exists in the system
2. **Other (e.g. rebate):** For example, issue a credit note to a customer to purely offer credit without any adjustments to an invoice



Please note that the credit note needs to be approved by Olymel for both options



Invoice number cannot contain more than 16 characters otherwise this will lead to an integration error

The screenshot shows a dialog box titled "Credit Note" with a close button (X) in the top right corner. The main text reads: "If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other." Below this text, there are two radio button options under the heading "Reason": "Resolve issue for invoice number" (which is selected) and "Other (e.g. rebate)". To the right of these options is a dropdown menu containing the text "INV 111". At the bottom right of the dialog box, there are two buttons: "Cancel" and "Continue". A red rectangular box highlights the "Reason" section and the "Resolve issue for invoice number" option.

# CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)



Here we will see how to create a credit note to resolve an issue with the invoice

1. Click on **Create Credit Note** button from the Invoices tab in CSP
2. A new window pops up. **Select a reason** for creating the credit note – “**Resolve issue for invoice number**” \*
3. Click on **Continue** button



\*Reason consist of 2 options “Resolve issue for invoice number” and “Other (e.g. rebate)”. This is to identify for which reason the credit note is being created.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, and Pa. Below this, there are sub-navigation options: Sourcing, Add-ons, and Setup. The main content area is titled 'Invoices' and contains an 'Instructions From Customer' section with a note: '(Example text - this is set on your Company Information setup page and will be displayed for CSP and SA...'. Below the instructions, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a red box and a blue circle with the number 1.

The screenshot shows a 'Credit Note' dialog box. The text inside reads: 'If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select...'. Below this text, there are two radio button options: 'Resolve issue for invoice number' (which is selected and highlighted with a red box) and 'Other (e.g. rebate)'. To the right of these options is a text input field containing 'INV 111', which is also highlighted with a blue circle and the number 3. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Continue', with the 'Continue' button highlighted with a red box.

# CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)



4. Select your choice – “**Completely cancel the invoice with a credit note**” or “**Adjust invoice with a credit note**” \*
5. Click on **Create** button
6. Enter the **Credit Note #** (Mandatory)
7. Select the **Credit Note Date** (Mandatory)
8. For **Image Scan** field, upload the legal invoice copy supporting documents (Mandatory)
9. Click on **File** hyperlink to upload the supporting documents (Mandatory)



\* **Completely cancel the invoice with a credit note:** This option will cancel the full invoice against the credit note, also you will not have the option to edit the amount/qty

\* **Adjust invoice with a credit note:** This option allow you to modify the amount/qty for which the credit note needs to be created and the invoice can be partially adjusted with the credit note

Credit Note

How do you want to correct invoice "INV 111" ?

Completely cancel the invoice with a credit note

Adjust invoice with a credit note

Cancel Create

General Info

\* Credit Note #

\* Credit Note Date 2023-12-11

Payment Term NT30

\* Currency CAD

Status Draft

Shipping Term

Original Invoice Number Invoice 101

Original Invoice Date 2023-12-08

Image Scan Choose File No file chosen

Supplier Note

\* Attachments Add File | URL | Text

Exchange Rate

# CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)



Scroll down to lines section

10. Choose the adjustment type on the line items – **Quantity, Price** or **Other**
11. Enter the adjustment either on the **Quantity** (negative number) or **Price** (negative number) fields(or **both**) based on the Adjustment type you chose, and as applicable

Scroll down to the bottom of the invoice.

12. Click on **Calculate** to recalculate the Credit note **total** amount.
13. Taxes get auto reversed based on the updates made on the line and the **Total Tax** field displays the same
14. The invoice gets adjusted as per the input. Enter **Submit** to issue the credit note
15. A pop-up message appears asking you to confirm your action. Click on **Send Credit Note** to send the credit note.

The screenshot shows the 'Lines' section of the Olymel system. A red box highlights the 'Adjustment Type' dropdown menu (10) with 'Other' selected, and the 'Quantity' field (11) with '-4.0' entered. Below this, the 'Qty' field (11) shows '-4.0', 'UOM' is 'Acre', and 'Price' is '100.00'. The total for this line is '-400.00'. Below the line item, the 'PO Line' is 'C00000274-1', 'Service/Time Sheet Line' is 'None', and 'Billing' is 'C100-1108-COST CENTER-12031010-65100010'. At the bottom, a summary table (13) shows 'Total Tax' as -14.00, 'Net Total' as -200.00, and 'Total' as -214.00. The 'Calculate' (12) and 'Submit' (14) buttons are highlighted. A pop-up message (15) asks 'Are You Ready to Send?' and provides a 'Send Credit Note' button.

Field	Value
Qty	-4.0
UOM	Acre
Price	100.00
Total	-400.00
Total Tax	-14.00
Net Total	-200.00
Total	-214.00

# CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)



Here we will see how to create a credit note to purely offer a credit to the customer

1. Click on **Create Credit Note** button
2. A new window pops up. **Select a reason** for creating the credit note – “**Other (e.g. rebate)**” \*
3. You can **Select a Contract** from the dropdown list if applicable
4. Click on **Continue** button

coupa supplier portal

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogues Pa

Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

## Invoices

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SA} Create Invoices ⓘ

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

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason

Select

Resolve issue for invoice number

Other (e.g. rebate)

Select a Contract (if applicable)

Cancel Continue

# CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)



5. Enter the **Credit Note #** field (Mandatory)
6. Select the **Credit Note Date** (Mandatory)
7. The **Currency** field will be defaulted to CAD (Mandatory)
8. In the **Image Scan** field, upload the legal invoice copy (Mandatory)
9. Please upload the supporting documents in the **Attachments** field
10. Click on the **magnifying glass icon** to select the address for **Invoice From Address**, **Remit-To Address** and **Ship From Address** fields (Mandatory)
11. Enter the **Requester Email** (Mandatory)
12. Enter the **Requester Name** (Mandatory)

The screenshot shows the 'General Info' section of the credit note creation form. It includes fields for 'Credit Note #', 'Credit Note Date', 'Currency', 'Image Scan', and 'Attachments'. There are also address selection fields for 'Invoice From Address', 'Remit-To Address', and 'Ship From Address'. The form is partially filled with example data, and several fields are highlighted with red boxes and numbered callouts (5-10) corresponding to the instructions.



The Credit Note created acts as a standalone Credit Note



For a standalone Credit Note, populate the Original Invoice Number field as NA. For Original Invoice Date field, populate today's date



Credit note number cannot contain more than 16 characters otherwise this will lead to an integration error

The screenshot shows the 'To' section of the credit note creation form. It includes fields for 'Requester Email' and 'Requester Name'. The form is partially filled with example data, and several fields are highlighted with red boxes and numbered callouts (11 and 12) corresponding to the instructions.

# CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)



13. Select the **Type** as **Qty** for Item based line or **Amt** for a Service based line

14. Add **Description**, **Qty** (negative number), **UOM** and **Price** fields for **Qty** Type line

15. Add **Description** and **Price** (negative number) fields for **Amt** Type line

16. Click on **Add Line** hyperlink if additional credit note lines needs to be added

14

13

Lines  Line Level Taxation

Type Qty	Description	Qty 1.000	UOM Each	Price -500.00	-500.00
-------------	-------------	--------------	-------------	------------------	---------

PO Line: None [Clear](#) Service/Time Sheet Line: None Contract: Supplier Part Number:

15

[+ Add Line](#) [+ Pick lines from PO](#) [+ Pick lines from Contract](#) Totals & Taxes

16

Lines  Line Level Taxation

Type Amt	Description	Price -500.00	-500.00
-------------	-------------	------------------	---------

PO Line: None [Clear](#) Service/Time Sheet Line: None Contract: Supplier Part Number:

[+ Add Line](#) [+ Pick lines from PO](#) [+ Pick lines from Contract](#) Totals & Taxes

# CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)



17. Click on **Calculate** to recalculate the Credit note **total** amount.

18. The invoice gets adjusted as per the input. Enter **Submit** to issue the credit note

19. A pop-up message appears asking you to confirm your action. Click on **Send Credit Note** to send the credit note.

Total Tax	0.00
Net Total	-150.00
<b>Total</b>	<b>-150.00</b>

Buttons: Cancel, Save as Draft, **Calculate** (17), **Submit** (18)

**Are You Ready to Send?** [X]

You're about to send an credit note to **Olymel** for a total amount of **-150.00**. Once sent, you'll have to contact your customer directly to make changes to the credit note.

Buttons: Continue Editing, **Send Credit Note** (19)



# CREDIT NOTE CREATION – PO FLIP (CSP)



You can also create a credit note from an Order line.

1. Click **Orders** from the top menu bar.
2. Search for the **order** in the displayed orders from the Search window
3. Click on the **red coin stack** icon to initiate a **Credit note**

The Credit Note page appears

4. Follow steps from Slide in lesson 5

The screenshot shows the Olymet system interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Payments', and 'Business Performance'. The 'Orders' menu item is highlighted with a red box and labeled '1'. Below the navigation bar, there are sub-menus for 'Sourcing', 'Add-ons', and 'Setup'. The main content area is titled 'Purchase Orders' and includes a 'Select Customer' dropdown menu with 'Olymet' selected. Below this, there is a section for 'Instructions From Customer' with a search bar and a button labeled 'Click the [red coin stack icon] Action to Invoice from a Purchase Order'. The bottom section features a table with columns: 'Export to', 'View', 'Search', 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'Unanswered Comments', 'Total', 'Assigned To', and 'Actions'. The 'Search' field is highlighted with a red box and labeled '2'. The table contains one row with the following data: PO Number: C000000319, Order Date: 2024-01-04, Status: Issued, Acknowledged At: None, Items: 5 Each of Item 2, Unanswered Comments: No, Total: 500.00 CAD. The 'Actions' column for this row contains a red coin stack icon, which is also highlighted with a red box.

Export to	View	Search	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
	All		C000000319	2024-01-04	Issued	None	5 Each of Item 2	No	500.00 CAD		[red coin stack icon]

# LESSON 9

## INVOICE DISPUTE (CSP)



# INVOICE DISPUTE (CSP)



If Olymel disputes an invoice, the invoice will be in status “Disputed” for the supplier to take action on.

There are 2 ways to resolve invoice disputes:

- **Correct Invoice:** If the disputed invoice has some incorrect detail, please choose Correct Invoice option to allow a correction to the invoice
- **Void:** If the disputed invoice was duplicate or has been already paid for, you can use the Void option to void the invoice

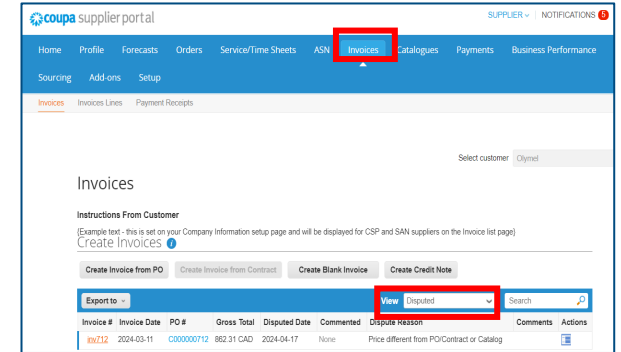
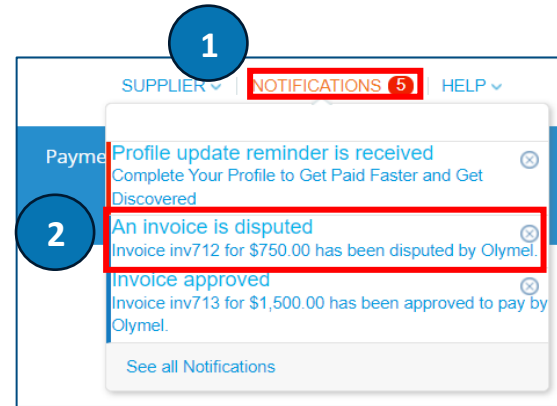


# INVOICE DISPUTE – A) CORRECT INVOICE (CSP)



You can view the disputed invoices from the **NOTIFICATIONS** section as well as from the **Invoices** section

1. Hover your cursor on the **NOTIFICATIONS** section to check dispute invoices
2. Click on the notification hyperlink
3. In General Info section, you can check for the **Dispute Reason(s)**



### General Info

**Invoice #** 1110235

**Invoice Date** 2023-11-10

**Payment Term** None

**Currency** CAD

**Status** Disputed

**Dispute Reason(s)** Price different from PO/Contract or Catalog

**Shipping Term** None

**Image Scan** None

**Supplier Notes** None

**Attachments** [Test\\_Receipt.JPG](#)

# INVOICE DISPUTE – A) CORRECT INVOICE (CSP)



4. Click on Correct Invoice button

Totals & Taxes

Lines Net Total	15,000.00
Header Tax Totals	0.00
<hr/>	
Shipping	0.00
Handling	0.00
Misc	0.00
<hr/>	
Total Tax	0.00
Net Total	15,000.00
<b>Total</b>	<b>15,000.00</b>

4

Void Correct Invoice

# INVOICE DISPUTE – A) CORRECT INVOICE (CSP)



5. Correct the Invoice details based on the dispute reason
6. Click on **Calculate** button
7. Click on **Submit** button
8. At the pop-up message, click on **Send Invoice** button. The invoice will be sent back to Olymel for further processing

Lines Line Level Taxation

Type	Description	Price	
Amt	Services	14,000.00	15,000.00 <span style="color: red;">✖</span>

PO Line: None Clear      Service/Time Sheet Line: None      Contract:       Supplier Part Number:

6      7

Delete   Cancel   Save as Draft   Calculate   Submit

**Are You Ready to Send?** ✖

You're about to send an invoice to **Olymel** for a total amount of **14,000.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

8

Continue Editing   Send Invoice

# INVOICE DISPUTE – B) VOID INVOICE (CSP)



Here we will see how to void a disputed invoice

1. Click on the **Invoices** section
2. Select the **View** as **Disputed** from the dropdown list
3. You can see the **Dispute Reason** mentioned
4. Click on the **Resolve** icon

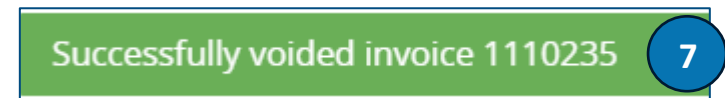
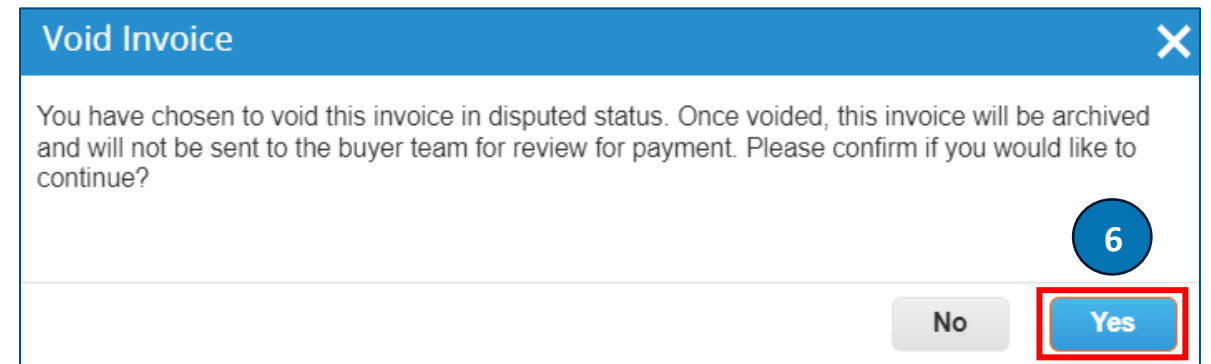
The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Payments', and 'Business Performance'. The 'Invoices' section is selected. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. The main content area displays 'Invoices' for the customer 'Olymel'. It includes an 'Instructions From Customer' section and a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is shown with columns: Invoice #, Invoice Date, PO #, Gross Total, Disputed Date, Commented, Dispute Reason, Comments, and Actions. The first row of the table is highlighted, showing invoice # 'inv712', date '2024-03-11', PO # 'C000000712', gross total '862.31 CAD', disputed date '2024-04-17', and dispute reason 'Price different from PO/Contract or Catalog'. The 'View' dropdown menu is set to 'Disputed'. The 'Resolve' icon in the 'Actions' column is circled with a '4'.

Invoice #	Invoice Date	PO #	Gross Total	Disputed Date	Commented	Dispute Reason	Comments	Actions
inv712	2024-03-11	C000000712	862.31 CAD	2024-04-17	None	Price different from PO/Contract or Catalog		

# INVOICE DISPUTE – B) VOID INVOICE (CSP)



5. Click on the **Void** button
6. At the pop-up message, click on **Yes** button to void the invoice
7. You will see a message stating Successfully voided the invoice





# LESSON 10

## SUPPLIER ACTIONABLE NOTIFICATIONS (SAN)

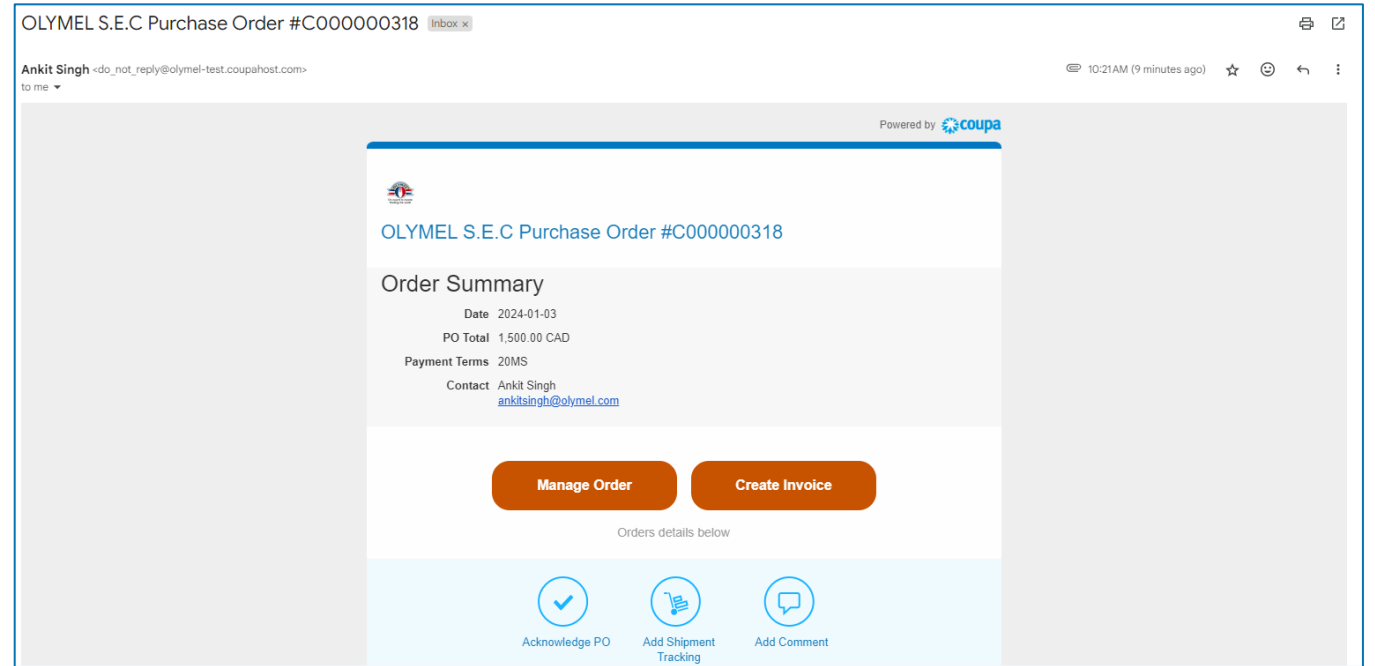


# SUPPLIER ACTIONABLE NOTIFICATION (SAN)



Supplier Actionable Notifications (SAN) allow suppliers to act on POs directly from email notifications for POs created in Coupa, having the options to **manage orders**, **acknowledge**, **create an invoice** from, or **add a comment** to a PO

Here is a screenshot of a SAN notification received by a supplier in their email

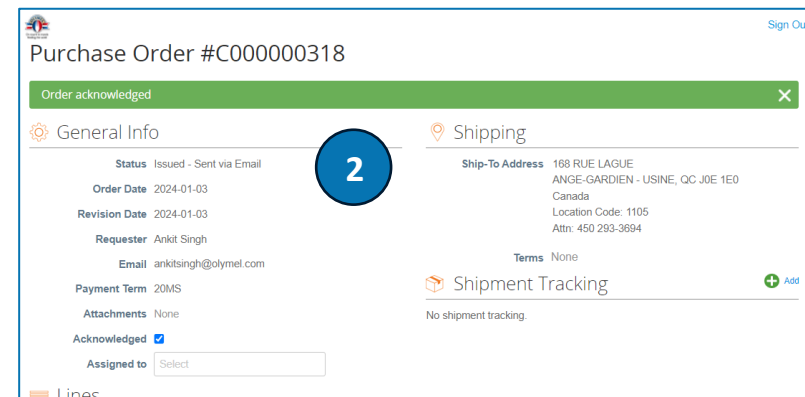
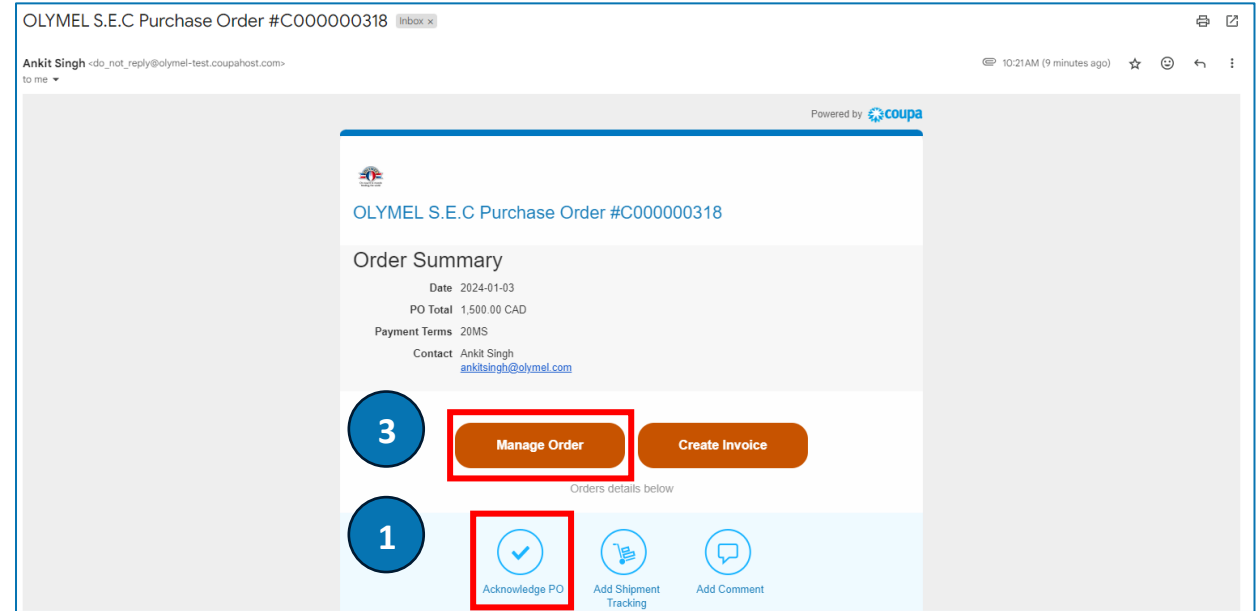


# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER



You can Acknowledge PO and Manage the Order using the SAN functionality

1. Click on **Acknowledge PO** icon
2. The Purchase Order will be acknowledged as seen in the screenshot
3. In order to manage order, Click on the **Manage Order** icon mentioned in the email



# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER



4. You have the option to Acknowledge the PO by checking the **Acknowledged** checkmark
5. You can use the **Create Invoice** button to create invoice for the PO, **Save** the PO and get a **Print View** of the PO

Purchase Order #C000000318

Sign Out

### General Info

Status: Issued - Sent via Email  
Order Date: 2024-01-03  
Revision Date: 2024-01-03  
Requester: Ankit Singh  
Email: ankitsingh@polymel.com  
Payment Term: 20MS  
Attachments: None  
**Acknowledged**   
Assigned to: Select

### Shipping

Ship-To Address: 168 RUE LAGUE  
ANGE-GARDIEN - USINE, QC J0E 1E0  
Canada  
Location Code: 1105  
Attn: 450 293-3894  
Terms: None  
Shipment Tracking: No shipment tracking. + Add

### Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	test	1	Each	1,000.00	1,000.00	0.00
Supplier Part Number			Manufacturer Name		Manufacturer Part Number	
None			None		None	
2	Item New	5	Each	100.00	500.00	0.00
Supplier Part Number			Manufacturer Name		Manufacturer Part Number	
None			None		None	

Per page 15 | 45 | 90

Total CAD 1,500.00

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

# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER PAYMENT AGREEMENT ON PURCHASE ORDER



Below are the steps to view a Payment Agreement on a Purchase Order

1. Click on the **Manage Order** button from the email notification
2. You will be able to view the Payment Agreement details on the purchase order
3. Click on **Create Invoice** button \*
4. Follow the steps mentioned in slides in Lesson 5 to create an invoice



\* When there is a Payment Agreement on a purchase order, irrespective of the amount, always invoice in full, when the service is fully delivered, otherwise the invoice will be rejected and disputed.

OLYMEL S.E.C Purchase Order #C000000366

Order Summary

Date: 2024-01-12  
PO Total: 700.00 CAD  
Payment Terms: 20MS  
Contact: Ankit Singh  
ankitsingh@olymel.com

**1**

**Manage Order** **Create Invoice**

Orders details below

Acknowledge PO Add Shipment Tracking Add Comment

Purchase Order #C000000366

General Info

Status: Issued - Sent via Email  
Order Date: 2024-01-12  
Revision Date: 2024-01-12  
Requester: Ankit Singh  
Email: ankitsingh@olymel.com  
Payment Term: 20MS  
Attachments: None  
Acknowledged:   
Assigned to: Select

Shipping

Ship-To Address: 188 RUE LAGUE  
ANGE-GARDIEN - USINE, QC J0E 1E0  
Canada  
Location Code: 1105  
Attn: 450 293-3694

Terms: None

Shipment Tracking: No shipment tracking.

**2**

**Payment Agreements**

1	Prepayment	100.00 CAD
Due Date	Terms	Note
None	None	None

Prepayments Total: 14.28% 100.00 CAD  
Retainages Total: 0.00% 0.00 CAD

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	New Item 1	7	Each	100.00	700.00	0.00

Supplier Part Number: None  
Manufacturer Name: None  
Manufacturer Part Number: None

Per page: 15 | 45 | 90

Total CAD: 700.00

**3**

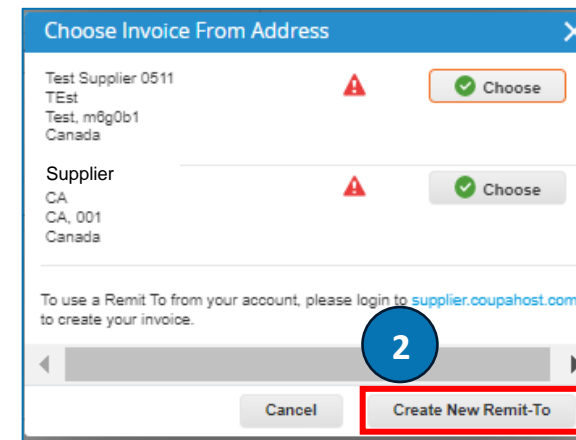
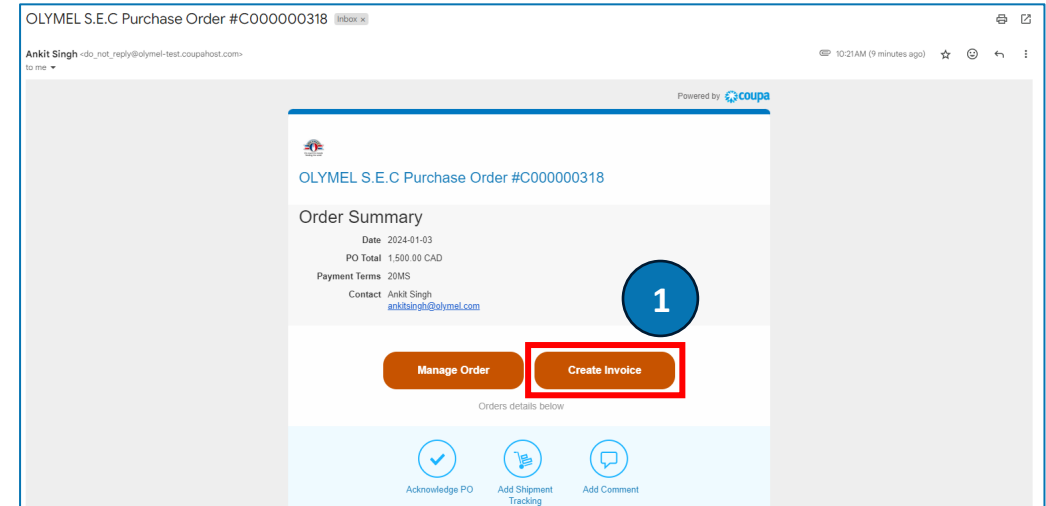
**Create Invoice** Save Print View

# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE



You can Create Invoice using the SAN functionality as well

1. In order to execute this, Click on the **Create Invoice** icon mentioned in the email
2. At the pop-up message, click on **Create New Remit-To** button to create a Remit To address



# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE



3. Populate the details as required and click on **Create and Use** button

### Enter a new address

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

Company Information

Supplier SUPPLIER

\* Country/Region

\* Registered company legal name

PST/QST Registration Number

Address

Remit To Name

\* Line 1

Line 2

Line 3

Line 4

\* City

State

\* Postal Code

### Tax Registration

Tax Country/Region

\* Tax ID

Not For Cross-Border Invoices

### Banking Information

NOTE: Banking information is required for compliant invoicing when indicated (with a \*). Otherwise, banking info here is not required and will remain private

Bank Name:

Beneficiary Name:

Bank Account Number:

# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE



4. Enter the Invoice number in the **Invoice #** field (Mandatory)
5. Enter the **Invoice Date** (Mandatory)
6. Validate the **Currency** (Mandatory)
7. In the **Attachments** field, click on the **File / URL** or **Text** hyperlink and upload the documents
8. You can enter the Line Level Taxation by following the instructions listed in lesson 7



Remittance information will be maintained in Olymel's ERP system and the Remit To Address values entered in CSP will not impact payment against invoices submitted



Please do not enter Line level and Header level taxes together on the same invoice

The screenshot displays the 'General Info' and 'Lines' sections of the Olymel system. The 'General Info' section includes fields for Invoice #, Invoice Date, Currency, Status, Shipping Term, Image Scan, Supplier Note, Attachments, and Exchange Rate. The 'Lines' section shows a table with columns for Type, Description, Qty, UOM, Price, and a total price of 1,000.00. A red box highlights the 'Line Level Taxation' checkbox, and a blue circle highlights the '8' in the top right corner of the 'Lines' section.

Type	Description	Qty	UOM	Price	Total
PO Line C000000318-1	test	1	Each	1,000.00	1,000.00
PO Line C000000318-2	Item New	5	Each	100.00	500.00



# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE



9. You can enter the Header Level Taxation by following the instructions listed on slide 53
10. Click on **Calculate** button
11. Click on **Submit** button to submit the invoice created

Totals & Taxes

Lines Net Total	700.00
<hr/>	
Shipping	<input type="text" value="10"/>
Tax	<input type="text" value="0"/> % <input type="text" value="0.00"/>
<input type="button" value="+"/>	
<hr/>	
Handling	<input type="text" value="20"/>
Tax	<input type="text" value="0"/> % <input type="text" value="0.00"/>
<input type="button" value="+"/>	
<hr/>	
Misc	<input type="text" value="30"/>
Tax	<input type="text" value="0"/> % <input type="text" value="0.00"/>
<input type="button" value="+"/>	
<hr/>	
Tax	<input type="text" value="0"/> % <input type="text" value="0.00"/>
<input type="button" value="+"/>	
<hr/>	
Total Tax	0.00
Net Total	760.00
<b>Total</b>	<b>760.00</b>

10 11

# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ADD COMMENT



You can add comments on the PO using the SAN functionality as well

1. In order to execute this, Click on the **Add Comment** icon mentioned in the email
2. In the **Comment** section, add your comments and click on **Add Comment** button

This screenshot shows an email interface for a purchase order. The email header includes the sender "Ankit Singh" and the subject "OLYMEL S.E.C Purchase Order #C000000318". The main content is a purchase order summary powered by Coupa. The summary includes the date (2024-01-03), PO total (1,500.00 CAD), payment terms (20MS), and contact information for Ankit Singh. Below the summary are two buttons: "Manage Order" and "Create Invoice". At the bottom of the summary, there are three icons: "Acknowledge PO", "Add Shipment Tracking", and "Add Comment". The "Add Comment" icon is highlighted with a red box and a blue circle containing the number "1".

This screenshot shows the "Comment" section of the interface. It features a "Comment" header with a "Mute Comments" option. Below the header is a text input field with the placeholder text "Enter Comment". The input field contains the text "Please check the the quantity". Below the input field is a link for "Add File | URL". At the bottom of the section, there is an "Add Comment" button, which is highlighted with a red box and a blue circle containing the number "2".

# SUPPLIER ACTIONABLE NOTIFICATION (SAN) – DISPUTED INVOICES



You can resolve dispute on an invoice using the SAN functionality as well

1. You will receive your email notification for the disputed invoice
2. Go to your SAN notification and click on Create Invoice icon to view the disputed invoices
3. Follow the steps mentioned in lesson 9

1

**Invoice #INV 9000 has been marked as Disputed by Olymel**

Hi,  
Your Invoice **INV 9000** has been marked as disputed by your customer, Olymel.

**Dispute Reason(s)**

- Attachment missing or in incorrect format

**Date:** 2024-01-05  
**Additional Comments:** None

**OLYMEL S.E.C Purchase Order #C000000329**

**Order Summary**

**Date:** 2024-01-05  
**PO Total:** 500.00 CAD  
**Payment Terms:** 20MS  
**Contact:** Ankit Singh  
[ankitsingh@olytel.com](mailto:ankitsingh@olytel.com)

Manage Order
Create Invoice

Orders details below

Acknowledge PO

Add Shipment Tracking

Add Comment

[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** i

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

View

All

Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute Reason	Actions
None	2024-01-05	Draft	C000000329	500.00 CAD	No		
INV 9000	2024-01-05	Disputed	C000000329	500.00 CAD	No	Attachment missing or in incorrect format	

# LESSON 11

## SOURCING EVENT PARTICIPATION



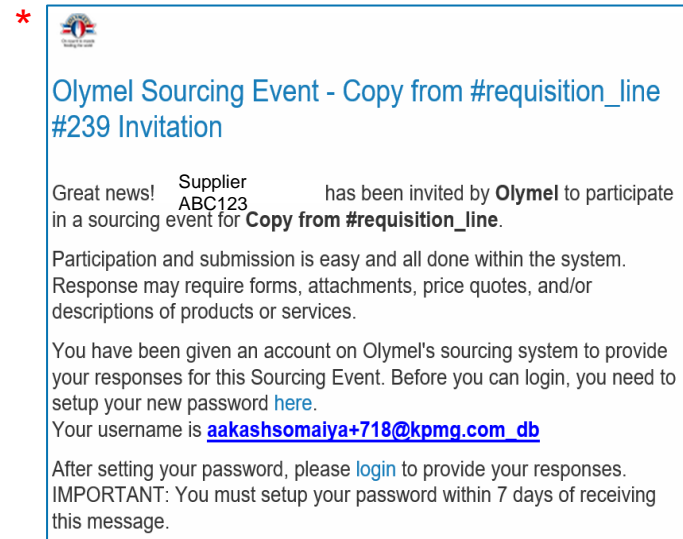
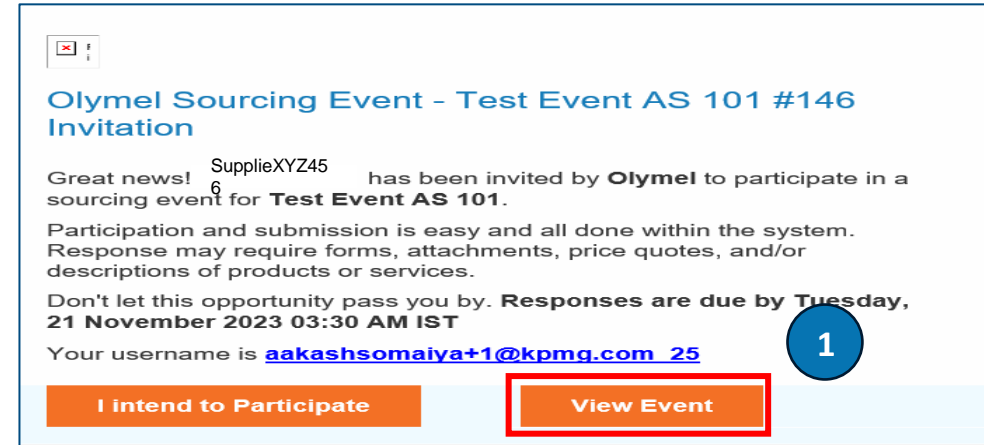
# SOURCING EVENT PARTICIPATION



Once a Sourcing Event is launched, the supplier receives an email notification to participate in the sourcing event.

Follow the below mentioned steps to participate in a sourcing event and submit your responses

1. The supplier receives an email notification for the sourcing event. Click on **View Event** button to get redirected to the event
2. Enter the **Username** and **Password**. If you are a new supplier, then you get a password reset link where you can set your password for logging into the instance. Click **To log in** button



# SOURCING EVENT PARTICIPATION



You will be able to view all your sourcing event that you have participated in / invited to with their status

3. Click on the **Event #** hyperlink
4. You will be able to view a clock showing the **Event Ends** time
5. Checkmark the checkbox for **I intend to participate in this event** field
6. Click on the **Terms and Conditions** document hyperlink to view to terms as applicable
7. Select the radio button option as **Yes** for **Do you except these Terms and Conditions?** As applicable
8. Click on **Send to Event Owner** button

Claim your profile to amplify trust with current and future customers. [GET STARTED](#)

Welcome to your Sourcing Response Portal!

Great news! **Supplier** has been invited by **Olymel** to participate in a sourcing event for **Test Event AS 101**. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
146	Test Event AS 101	2023-11-08	2023-11-21	Prod	RFP	0
140	Test Event 80	2023-11-02	2023-11-02	Evaluation complete	RFP	1

Event Ends 12:11 days hrs

[Event Info](#)

Great news! **Supplier** has been invited by **Olymel** to participate in a sourcing event for **Test Event AS 101**. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

Do you intend to participate in this event?

I intend to participate in this event  
Buyer will be notified of your intent to participate.

[Accept Terms and Conditions](#)

[Terms and Conditions](#)  
Sample\_Document.docx

Do you accept these Terms and Conditions?  
 Yes  
 No

[Send to Event Owner](#)

# SOURCING EVENT PARTICIPATION



9. Event Timeline will be visible for your reference. Click on **Enter Response** button
10. Enter a **Name** of the response you are submitting to the event owner

Timeline

**Nov 8** Event Start  
3:02 PM Asia/Kolkata  
12d : 12h : 27min

**Nov 21** Event End  
3:30 AM Asia/Kolkata  
00:00

9 **Enter Response**

Test Event AS 101 - Event #146 Active

Claim your profile to amplify trust with current and future customers. **GET STARTED**

Event Ends **12 : 10**  
days hrs

Event Info My Responses Supplier ABC123

10 **\* Name**

# SOURCING EVENT PARTICIPATION



11. Download and view any **Attachments** if attached
12. Populate the details of the **Forms** as applicable
13. Click on **Save** button
14. Enter the Item details like **My Price** (Mandatory) and other fields as applicable
15. Click on **Save Item** button
16. Another way to enter the Item details is by clicking on **Import from Excel** button

This screenshot shows the 'Attachments' and 'Forms' sections of the sourcing event interface. The 'Attachments' section is highlighted with a red box and a blue circle labeled '11'. Below it, the 'Forms' section is highlighted with a red box and a blue circle labeled '12'. The form contains several questions with radio button options: 'Order Delivery In?' (6-10 Days), 'Volume Rebate/Discount?' (No), and 'Growth Rebate/Costing?' (No). There is also a 'Commercial References' section with a 'Choose File' button. A blue circle labeled '13' is positioned over the 'Save' button at the bottom right of the form.

This screenshot shows the 'Item Requested' section of the sourcing event interface. The 'My Price' field is highlighted with a red box and a blue circle labeled '14'. The 'Save Item' button is highlighted with a red box and a blue circle labeled '15'. The 'Import from Excel' button is highlighted with a red box and a blue circle labeled '16'. The interface includes fields for 'My Capacity' (100), 'Expected Quantity' (100 Each), 'Ship To', 'Item Details', 'Your Item Name', 'ID/Part Number', 'Lead Time', and 'Description'. The 'Line Total' is shown as 0.00 CAD. At the bottom, there are buttons for 'Export to Excel', 'Import from Excel', 'Load History', 'Save', and 'Submit Response'.



# SOURCING EVENT PARTICIPATION



17. Click on the **Response Template** hyperlink to download the template
18. Enter the item specific details and save the file
19. Click on **Choose File** option and upload the response template
20. Click on **Start Upload** button
21. You will see a message stating “**Excel import successful. Remember to submit your changes below**”
22. Click on **Submit Response** button to submit your event responses

Test Veent 1010 - Excel Upload

Steps for uploading your response in Excel

1. Download the **Response Template** 17 (template will only work for this event)
2. Fill in or update the Excel file.
  - Fields marked with a "\*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.
  - Values in the uploaded file will replace anything currently saved to your response.
  - Once you click "Start Upload" values in the excel file will be saved, but not submitted.
  - Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
3. Load the updated file 19

Uploading will only save your response. You must click "Submit" to send it to the buyer.

20

Start Upload

Excel import successful. Remember to submit your changes below. 21

Items and Services

Name	My Capacity	Expected Qty	My Price	Price x Expected Qty >
Items Not In Lots (2 items)				550.0000 CAD
Item 101		10 (Each) x	5.00 *	50.00 CAD
Item 102		50 (Acre) x	10.00 *	500.00 CAD
Total				550.00 CAD

Export to Excel Import from Excel Load History Save Submit Response 22

# COURSE SUMMARY



# COURSE OBJECTIVES REVIEW



**Congratulations, you have completed the course!**

You are now able to:

- Register on the Coupa Supplier Portal
- Get an overview about CSP Homepage
- Invite New Users and Manage Existing Users in CSP
- View and Acknowledge a received PO (CSP)
- Create Invoice from PO
- Add Header level taxes on invoice
- Add Line level taxes on invoice



# COURSE OBJECTIVES REVIEW



**Congratulations, you have completed the course!**

You are now able to:

- Create a Credit Note
- Resolve Invoice Disputes
- View and Respond to a PO Supplier Actionable Notifications (SAN)
- Participate and submit responses for a sourcing event



# Next steps & conclusion

# “No PO no PAY” - Go LIVE June 3rd 2024

APRIL—MAY 2024

JUNE—AUGUST 2024

SEPT. —OCT. 2024

NOV. 2024

SUPPLIERS

## MESSAGE 1

1. As of June 3 2024, a PO is mandatory for all issued invoices.
2. As of November 1 2024, invoices without a PO will be rejected.
3. Exceptions to the rule

## MESSAGE 2—ON PAYMENT NOTICES

As of November 1, invoices without a PO will be rejected.

## REMINDER 1

As of November 1, invoices without a PO will be rejected.

## REMINDER 2 EFFECTIVE DATE

As of November 1, invoices without a PO will be rejected

# Enabling suppliers

## Supplier Section

As of April 8

New section on the Olymel website dedicated to suppliers

- [Coupa in brief - Olymel L.P.](#)
- Information about Coupa
- Reference guide, documentation, FAQ, training

## Training

May

Virtual and self-learning Coupa training

- Tiers 1 & 2: Virtual session
- Tier 3: Training capsule (self-pace) in the Supplier Section

## Communications

April to June

Various communications sent to suppliers

- Supplier Section launch, go-live date, next steps
- Invitation to virtual training courses and to view self-pace training
- Announcement of Coupa launch (Go-Live)
- Training reminder, Supplier Section, support contact

# Next Steps

**Olymel aims to optimize the use of the Coupa platform by its suppliers.**

To deepen the understanding of the CSP tool, additional resources will be made available:

- Video capsules for each lesson will be accessible on the supplier space for future reference.
- Q&A sessions will be organized in the days following the Go-live to discuss various issues or questions encountered.

Please note that the Coupa Supplier Portal will not be available before the Go-Live. Olymel will send communications regarding this matter.

*For functional support, please communicate with [[SupportPartenairesOlymel@OLYMEL.com](mailto:SupportPartenairesOlymel@OLYMEL.com)]*





Thank You!