

The Clorox Services Company

Coupa Supplier Portal Training Guide

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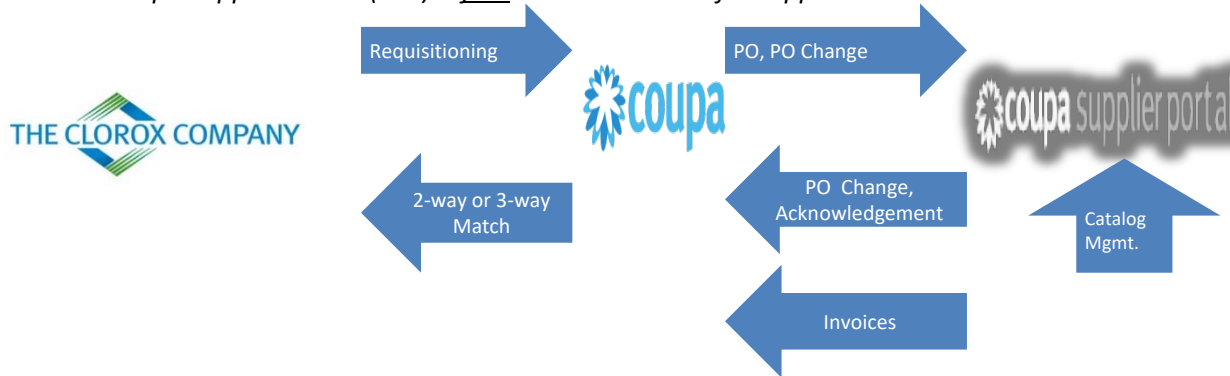
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What is Coupa?



Clorox has selected Coupa as the technology platform to streamline the procure-to-pay processes and electronic Purchase Order and Invoicing transmission.

- Coupa is a user-friendly e-Procurement and cloud-based supplier collaboration software
- Coupa is an internet-based solution capable of accommodating a variety of different systems (plug and play)
- The Coupa Supplier Portal (CSP) allows suppliers to become more efficient by automating activities, including invoice creation, as much as possible to fit their capabilities (i.e. PO flip, orders routing, partial invoicing)
- *The Coupa Supplier Portal (CSP) is free - there is no cost for suppliers*



How Will You Benefit?



By working with Clorox electronically, you will increase your order-taking efficiency, invoice creation, reduce mistakes and delays fulfilling orders and maintain a better presence with Clorox users.

Benefits include, but are not limited to:

- Efficient Purchase Order receiving and acknowledgement
- Efficient invoice processing
- PO-backed invoice creation
- Automated accurate routing of invoices to proper branches
- Instant visibility to Purchase Order, Invoice status and Payment Information
- Efficient catalog management
- Reduced or even eliminated manual paper transaction processing
- Strong reporting capabilities

Connecting to Clorox via Coupa



It is vital that all suppliers connect to the Coupa platform to transact with Clorox successfully.

Note: Ensure Clorox has your correct primary contact details.

Slide 6 is an example of the initial e-mail invite (from Clorox) to set up your Coupa Supplier Portal account to transact with Clorox on Coupa.

After Clorox sends you an invitation to join the Coupa Supplier Portal (CSP), check the email address inbox which the invite was sent to and click on the link to confirm their request to interact with you as a supplier on Coupa.


By confirming this link and selecting “**Join Coupa**” you will be creating a new login on the Coupa Supplier Portal to receive Purchase Orders (POs) and send Invoices to Clorox.


If the invite was sent to the incorrect person at your company, inform your Clorox contact or contact Clorox at SupplierCSP@Clorox.com . If you received the invite incorrectly yourself and need to send to another person within your company, select “**Forward this Invitation**”, below.

Connecting to Clorox via Coupa



Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to me

 **Clorox Services Company Registration Instructions - Action Required**

Powered by 

Hello Jay's Janitorial Services,

We handle all our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.


Justin Cottrell
Clorox Services Company


[Join Coupa](#) [Forward this invitation](#)

[Overview](#)
Learn more about the Coupa Supplier Portal

[Need Help?](#)
Answers to common questions and issues

[Coupa Info](#)
Learn more about how companies use Coupa


Business Spend Management



Create your business account

Clorox Services Company is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Clorox Services Company so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter

Password Confirmation

☒ I accept the [Privacy Policy](#) and the [Terms of Use](#)

[Get Started](#)

[Having an issue with signup?](#)

[Forward this to someone](#)

- Fill out your information on the Coupa Supplier Portal to create a new account
- Click the check box to accept the Terms of Use
- Click **Get Started**

Merging Accounts



- Merge request appears in the right-hand on the **Home** page
- Click **Request Merge** to merge the accounts
- Click **Remove** to remove the request

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

SupplierA
supplierA@supplier.com

Request Merge

Remove

SupplierB
supplierB@supplier.com

Request Merge

Remove

Create or Update the Supplier Profile



- Below is the **Profile** section/tab of the Coupa Supplier Portal. You will use this section to fill out additional company information.
- Populate your company profile with all relevant company information Using **Edit Profile**

The screenshot shows the Coupa Supplier Portal interface. The 'Profile' tab is highlighted in the top navigation bar. The main content area is divided into two sections: 'Jay's Janitorial Services' on the left and 'Contact Information' on the right. The 'Contact Information' section includes fields for Address, Primary Contact (Clx Supplier), Work Phone, Mobile Phone, and Fax Number. A red box highlights the 'Edit Profile' button at the bottom right of the page.

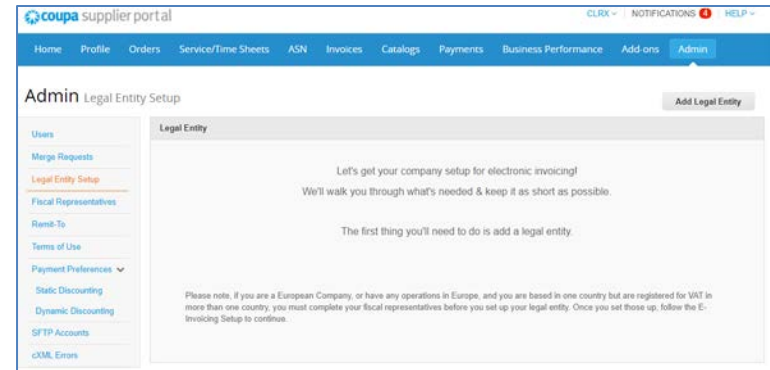
This block shows a detailed view of the form fields for the 'Address' and 'Primary Contact' sections. The 'Address' section includes fields for Address Line 1, Address Line 2, City, State, Postal Code, and a dropdown for Country (set to United States). The 'Primary Contact' section includes fields for First Name, Last Name, Email (clxcoupa@gmail.com), Work Phone, Mobile Phone, Fax Number, and PO Delivery Email.

Legal Entity Setup



You need to add Legal Entity information as well as Remit-To and Ship From Addresses to enable E-Invoicing

- Click Admin tab from the top menu bar then select **Legal Entity Setup** from the menu on the left
- Click Add Legal Entity
- Enter your Legal Entity information
- Click Continue



* Legal Entity Name

Country

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

Cancel

Continue

Legal Entity Setup: Enabling E-Invoicing



- Complete the invoice address details
- Enable the below checkboxes if Remit-To and Ship-From addresses are same as invoice address
 - Use this address for Remit-To*
 - Use this address from Ship from address*

- If either Remit-To or Ship from address is different then disable the corresponding checkbox and enter different address details

**Note: Please ensure Clorox has your current Remit-To Address on file to avoid invoice processing delays in Coupa. This will need to be updated directly with Clorox as the system of record is within their ERP.*

- Click **Save & Continue** when finished
- Review the information on the next screen and click **Done**

NOTE: If Ship from address and Remit-To address checkboxes are not selected, the user will have to provide this information after selecting Save & Continue

Adding and Editing Users



If desired, you can allow additional users to access your supplier account to perform all tasks

- From the top menu bar, select **Admin**, then click **Users** tab and then click **Invite User**
- Enter at least the employee's email address in the Invite User popup window and click **Send Invitation**
- You can restrict access to specific customers by checking/unchecking customer name boxes under Customers section

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

Add-ons **Admin**

Admin Users

Users

- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences

Users	Permissions	Customer Access
Clrx Supplier clrxcoupa@gmail.com Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets	Clorox Services Company

Invite User

Invite User

First Name

Last Name

Email

Permissions

- ☒ 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
- ☒ Pay Me Now
- ☒ Business Performance

Customers

- ☒ All
- ☒ Clorox Services Company

Cancel **Send Invitation**

Adding and Editing Users



If desired, you can edit existing users

- From the top menu bar, select **Admin** then click **Users** tab
- Click **Edit**
- Edit User Info, if required
- Enable or disable permissions under Permissions section
- You can restrict access to specific customers by checking/unchecking customer name boxes under Customers section
- Click **Save**

Users	Permissions	Customer Access
Clrx Supplier clrxcoupa@gmail.com Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets	Clorox Services Company

Edit user access for Clrx Supplier

User info

* First Name: Clrx

* Last Name: Supplier

Permissions

☒ All

☒ Admin

☒ Orders

☐ Restricted Access to Orders

☒ All

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

☐ Restricted Access to Service/Time Sheets

☒ All

Customers

☒ All

☒ Clorox Services Company

Cancel Save

Managing Notifications



Your notification preferences can be changed

- Click on your **name** link in the right top corner and then click on the **Notification Preferences** link
- On the **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive any or all of the notification types: online (to do list), email, or SMS (short text message)

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Payments Business Admin

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--	--------------------------------	------------------------------

Business Performance

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
-----------------------------------	--	--------------------------------	------------------------------

Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Viewing and Managing Catalogs



After initial setup with Clorox, you can manage catalog update requests from the CSP

- Select **Catalogs** from the top menu bar to view your Clorox catalog information and available actions*
- **Export to:** Export catalog details to CSV or Excel

NOTE: Only Draft status catalogs not submitted for Clorox Buyer approval can be directly edited or deleted

coupa supplier portal

CLR X | NOTIFICATIONS 4 | HELP

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

Select Customer Clorox Services Company

Configure Punchout

Catalogs

Create **Export to** View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Jay's Janitorial Services Catalog 1	08/25/20	None	None	None	Draft	No		

Viewing and Managing Catalogs



- Click on the **Catalog Name** to view the list of individual catalog items
- Click on the **Item Name** in your catalog to view the detailed item page

Test Catalog 2

Supplier Name Jay's Janitorial Services

Status Accepted by Customer

Start Date None

End Date None

Items Included in Catalog

View All Advanced Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Test Item 2	USAu9242		200.00		USD		

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Test Item 2

* Name Test Item 2

* Description Test Item 2

* Unit of Measure each

Purchasable Yes

Catalog	Currency	Part Number	Auxiliary Part Number	Lead Time	Manufacturer
Test Catalog 2	USD	USAu9242	None	None	None

Contract	Pricing Type	Price	Savings %
None	Fixed Price	200.00	None

Minimum Order Quantity	Order Increment
None	None

Viewing and Managing Catalogs



- Click **Create** to create and update catalog request
- You can either bulk upload catalog item updates via **Load from File** or individually via **Create**
- Click **Submit for Approval** when catalog updates, additions or changes are complete to automatically send for Clorox's review

Catalogs

CreateExport to

ViewAllAdvancedSearch

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Test Catalog 2	08/25/20	08/25/20	None	None	Accepted by Customer	No		
Test Catalog	08/25/20	None	None	None	Draft	No		

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Items Included in Catalog							
Create	Load from file	Export to	View All		Advanced	Search	
Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
No rows.							
Per page 15 45 90							

Test Catalog Edit Back

Customer Clorox Services Company

*Catalog Name Test Catalog

Status Draft

Start Date 01/11/21 date when catalog prices become effective

Expiration Date 01/11/22 date when catalog prices become expired

Currency USD

0 Items Changed (1 Unchanged)

0 Price Increase

0 Price Decrease

0 Other Fields Updated

NEW 0 New Items

0 Deactivated Items

Save

Submit to buyer

Items Included in Catalog

Viewing and Managing Catalogs



If applicable and you are a punch-out catalog capable supplier, fill out your punch-out catalog credentials in the form below, by clicking **Configure Punchout** on the **Catalogs** top right section.

Catalogs Payments Business Performance Add-ons Admin

Select Customer Clorox Services Company

Configure Punchout

Back

Configure Punch Out for Clorox Services Company

If your website supports it, you can configure punchout for your Coupa customers here.

* Name

* URL

* Buyer Identity

* Buyer Domain

* Supplier Identity

* Supplier Domain

* Shared Secret

* Protocol

Cancel OK

Creating Non PO-Backed Invoices



- Click **Invoices** from the top menu bar
- Click **Create Blank Invoice**
- Fill out invoice header details

coupa supplier portal

CLR X | NOTIFICATIONS 1 | HELP

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

Invoices Payment Receipts

Select Customer Clorox Services Company

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)
Create Invoices

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

NOTE: Correct Requester details are mandatory for proper invoice routing

Create Invoice Create

General Info

* Invoice #

* Invoice Date 08/25/20

Payment Term

* Currency USD

Status Draft

Image Scan **Choose File** No file chosen

Print On Check

Attachments Add File | URL | Text

To

Customer Clorox Services Company

Ship To Address No address selected

Requester Email

Requester Name

Creating Non PO-Backed Invoices



- Fill out line level details (Type, Description, Qty(for Qty based only), UOM(for Qty based only), Price, Contract). For an amount based invoices, change the type to amt.
- If applicable, add any shipping, handling and tax information
- Click **Submit** and **Send Invoice**

The screenshot shows the 'Lines' form with a red box highlighting the top section. This section includes fields for Type (Qty), Description, Qty (1.000), UOM (1 / square me), Price (0.00), PO Line (None), Contract, and Supplier Part Number. Below this, there are buttons for 'Add Tag' and 'Add Line'. The bottom section, 'Totals & Taxes', shows 'Lines Net Total' as 0.00. It includes sections for Shipping, Handling, and Misc, each with tax and tax reference fields. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit' (highlighted with a red box).

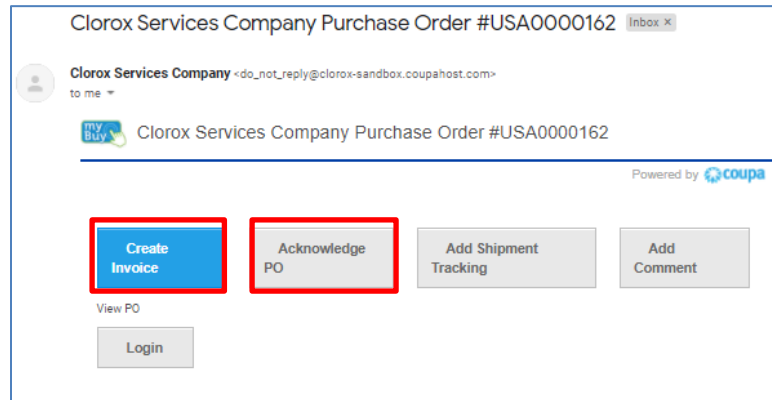
The screenshot shows a dialog box titled 'Are You Ready to Send?'. The message inside says: 'You're about to send an invoice to Clorox Services Company for a total amount of 700.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.' At the bottom, there are two buttons: 'Continue Editing' and 'Send Invoice' (highlighted with a red box).

Supplier Actionable Notification vs Coupa Supplier Portal



Supplier transactions via Email:

- With the help of Coupa, suppliers will be able to quickly **receive and acknowledge POs via email, by using SAN**
- As a supplier, you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons, so you will be able to:
 - **Acknowledge PO** – ability to acknowledge the incoming purchase order
 - **Create Invoice** – ability to create invoice against a PO (PO flip)
- Suppliers who are not on the CSP have the ability to create an invoice via SAN
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



Supplier Actionable Notification vs. Coupa Supplier Portal



Scroll down the email for more options:

- **Add Comment**
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications using **Login** button at the bottom of the email

Jay's Janitorial Services
Attn: Clrx Supplier
clrxcoupa@gmail.com

Ship To
Clorox Services Company
317 Zane Snead Dr.
Suite 225
Charlotte, NC 28277
United States
Charlotte, NC - USA
Attn: Justin Cottrell

PO NUMBER
USA0000162
DATE
08/25/20
PAYMENT TERMS

SHIPPING TERMS

CURRENCY
USD
CONTRACT

CONTRACT REFERENCE NUMBER

CONTACT
Justin Cottrell

justincottrell@kpmg.com

Bill To
Clorox Services Company
1221 Broadway
Oakland, CA 94612-1888
United States
Attn: Accounts Payable

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Cleaning Services	08/31/20	1	each	600.00	600.00
						600.00 USD

THIS IS WHERE THE LANGUAGE FOR T's & C's WOULD GO

Create Invoice

Acknowledge PO

Add Shipment Tracking

Add Comment

View PO

Login

Receiving/Viewing a Purchase Order



- Regardless of the PO delivery preference, you will have access to POs within the CSP
- Select **Orders** from the top menu bar
- When the page refreshes, select the applicable PO number from the list of Purchase Orders. You can also use the **Search** bar to locate the PO.
- Click **PO Number hyperlink** to view the complete PO details.

coupa supplier portal CLRX ▾ | NOTIFICATIONS 5 | HELP ▾

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

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer Clorox Services Company ▾

Configure PO Delivery

Purchase Orders

Instructions From Customer

1. Please acknowledge the PO upon receipt 2. If any issues reach out coupa@clorox.com 3. If there is a PO present, invoice directly against the PO

Click the 🗨 Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
USA0000162	08/25/20	Issued	None	1 each of Cleaning Services	No	600.00 USD		🗨 📄 📄
USA0000161	08/21/20	Issued	None	1 each of Cleaning Services	No	2,500.00 AUD		🗨 📄 📄
USA0000160	08/21/20	Issued	None	5 Hour of Sanitation Services - Post Event	No	1,750.00 AUD		🗨 📄 📄
USA0000151	08/18/20	Issued	None	1 each of Janitorial Supplies	No	700.00 AUD		🗨 📄 📄

Acknowledge a Purchase Order



- On the specific PO details page, select **Acknowledged** check box to acknowledge the receipt of PO

Note: User/Buyer will receive this supplier's acknowledgement in their Coupa system

Purchase Order #USA0000162

Status Issued - Sent via Email

Order Date 08/25/20

Revision Date 08/25/20

Requester Justin Cottrell

Email justincottrell@kpmg.com

Payment Term None

Attachments None

Acknowledged ☐

Assigned to

Shipping

Ship-To Address 317 Zane Snead Dr.
Suite 225
Charlotte, NC 28277
United States
Location Code: Charlotte, NC - USA
Attn: Justin Cottrell

Terms None

Shipment Tracking

No shipment tracking.

Lines

	Type	Item	Qty	Unit	Price	Total	Invoiced
1		Cleaning Services	1	each	600.00	600.00	0.00

Requesting PO Changes - Requesting



You can request PO changes if your customer allows you to submit PO change requests and you have the Order Changes permission.

- At the bottom of the purchase order, click **Request Change**

Lines

Advanced

Search

Sort by

Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Cleaning Services	1	each	600.00	600.00	0.00
	Need By	Part Number	Manufacturer Name	Manufacturer Part Number			
	08/31/20	None	None	None			

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Total USD 600.00

Create Invoice

Request Change

Save

Print View

- **Note:** Only one change request per PO can be pending approval at a time. You cannot submit multiple change requests for PO change while Clorox has a change pending approval.

Requesting PO Changes - Submitting



- Edit the fields (Qty/Price/Need By Date)
- If needed delete PO lines that cannot be fulfilled using delete (x) option
- Select **Reason for Change** from the dropdown
 - If other is selected, provide **comments**
- Click **Submit Change Request**
- Optionally you can save the changes and submit later by clicking **Save Change Request**
- Click **Request PO Cancellation** for requesting PO cancellation
- Changes are effective when a change request is approved. When a PO change request is rejected, you will receive a **Order change request is rejected** notification

Lines

Type	Item	Qty	Unit	Price	Total
1	Cleaning Services	1.00	each	600.00000	600.00

Need By Date
08/31/20

Total 600.00 USD

* Reason for Change

- Cannot fulfill order quantity/amount
- The ordered item is no longer available
- Cannot fulfill orders by the Need by date
- Other

Cancel Request PO Cancellation Save Change Request Submit Change Request

Requesting PO Changes – Reviewing and Withdrawing



- Click **Revision** dropdown to view PO revisions
- Click **Click to view pending change** (if any changes are pending approval)
- Click **Withdraw** to withdraw the PO changes

Purchase Order #USA0000160

There is a pending change request on this purchase order. [Click to view pending change](#)

General Info
Change Status: Pending Approval
Status: Issued - Sent via Email
Order Date: 05/01/20
Revision Date: 05/01/20
Revision # 276
Requester: Justin Cottrill
Ship To User: Justin Cottrill
Department: None
Payment Term: None
Description: None
Start Date: None
End Date: None
Project ID: None
Buyer Assigned: None
Contract Reference: None
Number
Attachments: None

Shipping
Address: 4300 Innovation Parkway
Suite 275
Irving, TX 75063
United States
Location Code: Dallas, TX - USA
Attn: Justin Cottrill
Terms: None
Supplier
Supplier: Jay's Janitorial Services
Email Opened: No
Transmission Method: Supplier default (Email)
Shipment Tracking
No shipment tracking


Lines

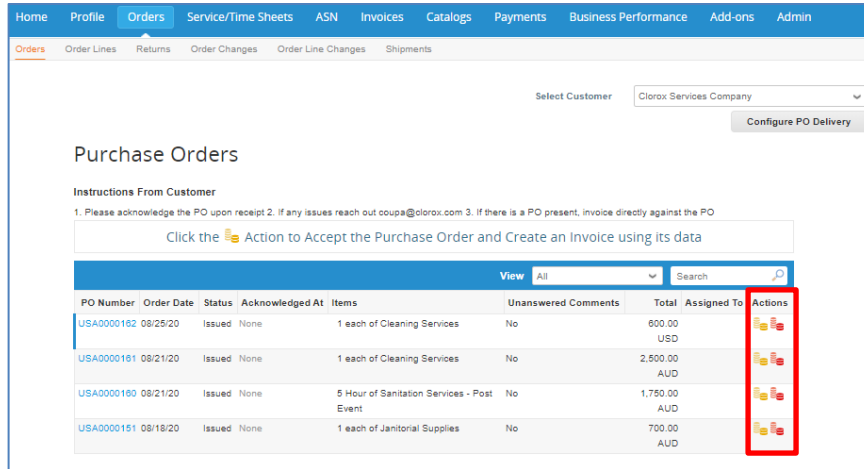
Type	Item	Qty	Unit	Price	Total
1	Sanitation Services - Post Event	7	Hour	350.00 AUD	2,450.00
		6			4,340.00 AUD
Need By: 11/02/20					
Total					2,450.00
					1,760.00 AUD

Withdraw

Creating PO-Backed Invoices



- Click **Orders** from the top menu bar
- Under the **Actions** column of the specific PO row, select the **yellow coin stack icon**  to flip the PO into an invoice




Purchase Orders





Select Customer: Clorox Services Company

Configure PO Delivery

Instructions From Customer

1. Please acknowledge the PO upon receipt 2. If any issues reach out to coupa@clorox.com 3. If there is a PO present, invoice directly against the PO

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
USA0000162	08/25/20	Issued	None	1 each of Cleaning Services	No	600.00 USD		
USA0000161	08/21/20	Issued	None	1 each of Cleaning Services	No	2,500.00 AUD		
USA0000160	08/21/20	Issued	None	5 Hour of Sanitation Services - Post Event	No	1,750.00 AUD		
USA0000151	08/18/20	Issued	None	1 each of Janitorial Supplies	No	700.00 AUD		

NOTE: Clicking  will create a credit note

- The page will refresh to display the create invoice screen
- If you have more than one Remit-To Address in your CSP profile, the Choose Remit-To Address popup will display
 - If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no popup to choose an address*
- If the correct Remit-To Address does not appear, click magnifying icon and then click **Create** button to create new remit-to address

Note: Clorox will be using the remit to address they have on file in their vendor master. Reach out to SupplierCSP@Clorox.com if updates are needed.

Creating PO-Backed Invoices



On the invoice creation screen, complete all the necessary information (all required fields are indicated with an asterisk)

- Use your own invoice numbering convention for the **Invoice #** field
- Input the correct **invoice date**
- Attach your **Invoice image scan (optional)**
- Verify auto populated invoice information at the header and line levels and adjust as necessary

NOTE: Invoice # character limit is 20 characters.
: Invoice scan should be a JPG, PNG, TIFF, PDF or GIF file.

Creating PO-Backed Invoices



For a Goods PO

- Update the price in the **Price** field, if needed
- Update the quantity in the **Quantity** field, if needed

Note: It is not recommended to change the catalog/order unit price

Type	Description	Qty	UOM	Price	
	Test Catalog Item1	<input type="text" value="2"/>	EACH	<input type="text" value="100.00"/>	200.00

For a Services PO

- Update the price in the **Price** field, if needed

Type	Description	Price	
Amt	<input type="text"/>	<input type="text" value="200.00"/>	200.00

Creating PO-Backed Invoices



- If applicable, add any shipping, handling and tax information
 - You can add applicable tax in the proper section by one of the following methods:
 - Manually enter a **tax percentage**
 - Manually enter a **tax amount (\$)**
 - Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Clorox, then click **Add Comment**
- When you have completed all information on the invoice, click **Submit**

This screenshot shows the bottom portion of an invoice form. At the top, a summary table displays the following values:

Total Tax	0.00
Net Total	2,500.00
Total	2,500.00

Below the table are five buttons: "Delete", "Cancel", "Save as Draft", "Calculate", and "Submit". The "Calculate" and "Submit" buttons are highlighted with red boxes. At the bottom, there is a "Comments" section with a text input field labeled "Enter Comment" and an "Add Comment" button, which is also highlighted with a red box.

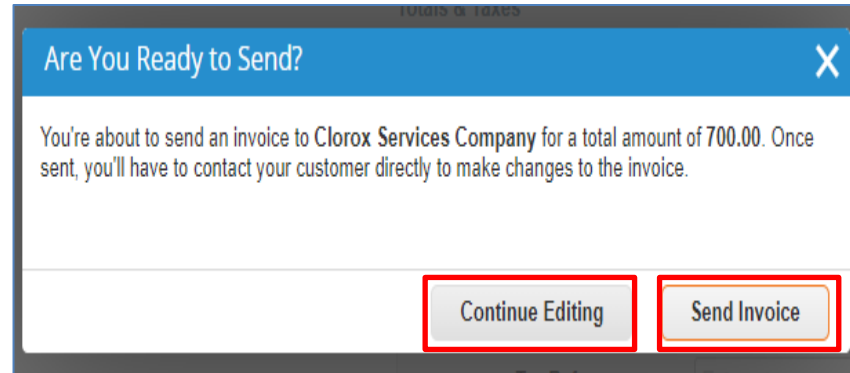
This screenshot shows the "Totals & Taxes" section of the invoice form. It contains three identical blocks for "Shipping", "Handling", and "Misc". Each block includes a text input field for the charge amount, a "Tax" section with a dropdown menu, a percentage input field (set to 0.000), and a "Tax Reference" text input field with the placeholder "Enter a tax reason description." At the bottom of the section, a final summary table shows:

Total Tax	0.00
Net Total	2,500.00
Total	2,500.00

Creating PO-Backed Invoices



- After you click **Submit**, a popup will appear to confirm if you are ready to send the invoice since invoices cannot be changed via email or CSP once submitted
- If you wish to go back to edit, click **Continue Editing**
- Click **Send Invoice** to send the confirmed complete invoice to Clorox



NOTE: User will be taken back to the invoice page after sending the invoice

Creating Credit Notes



- Click **Invoices** from the top menu bar
- Click **Create Credit Note**

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

Invoices Payment Receipts

Select Customer Clorox Services Company

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)
[Create Invoices](#)

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

Export to -- View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	08/25/20	Draft	USA0000184	2,400.00 USD	No		
USA942042	08/21/20	Approved	USA0000185	1,750.00 AUD	No		
USA7492	08/21/20	Pending Approval	USA0000181	2,500.00 AUD	No		

Per page 15 | 45 | 90


- Select **Reason** by selecting Invoice/Contract against which the credit will be issued
- Click **Continue**

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 ☒ Resolve issue for invoice number Select ☐ Other (e.g. rebate)

Cancel Continue

NOTE: Credit Notes can be also be created by locating a PO and selecting the  from the Orders page

Creating Credit Notes



- Select Credit Note correction type and click **Create**

- Complete all the necessary information (all required fields are indicated with an asterisk) on the Credit Note screen
 - **Original Invoice Number** and **Original Invoice Date** attribute values help referencing the Credit Note to a specific Invoice
- Click **Submit**

NOTE: Credit Note total should be negative

Invoice Bulk Upload – Create SFTP Accounts



SFTP Account needs to be created for loading invoices.

- Click **Admin** tab
- Click **SFTP Accounts**
- Click **Create**

The screenshot displays the 'Admin' section of the my Buy application. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The left sidebar lists various administrative options: Users, Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate Preferences, SFTP Accounts (highlighted with a red box), and cXML Errors. The main content area is titled 'SFTP Accounts' and features a 'Select Customer' dropdown. Below this, there is a section for 'Instructions From Customer' with the text 'Invoice bulk upload'. A prominent blue 'Create' button is visible, also highlighted with a red box. At the bottom of the page, there is a pagination indicator showing 'Per page 15 | 45 | 90'.

Invoice Bulk Upload – Create SFTP Accounts



- Either **Choose** a file with your own SSH public key to upload or **Create** an account and Coupa generates a password
- Save the password as it is shown only once

Create sFTP Account

SSH Key (optional)

No file chosen

[Cancel](#)

sFTP Account

Your password is found below (warning: Copy and store password securely as it is only shown once)

Username [REDACTED]

Hostname fileshare-test.coupahost.com

Your password is found below (warning: Copy and store password securely as it is only shown once)

Password [REDACTED]

Uploaded public key

Invoice Bulk Upload



- Download the attached invoice bulk loader template and fill-out the invoice details
 - Reference PO line details while updating po-backed invoice lines
 - Enter invoice line details accordingly while updating non-po backed invoice lines
 - Totals will be auto calculated in Coupa based on the line level totals, tax, shipping and handling amount
 - To load the images/attachments, zip the updated template (with image/attachment name) and the image/attachments and then load the zip file
- Transfer the updated template to ./Incoming/Invoices folder using any SFTP transfer mechanism
- Any number of invoices with any number of lines can be loaded using a single invoice loader file as long as the file size is not exceeding 8MB
- Once invoices are loaded successfully, you can view them in your Invoices section of the supplier portal

Note: Delete all other folders other than /Incoming/Invoices to avoid confusion (optional)

- The Bulk Load field mappings spreadsheet provides information regarding the each field.
- The templates are customized with minimal fields for easy bulk load experience.
- Refer invoice_template.csv if any additional fields need to added while uploading invoices.



Test Image.jpg



Creating Custom Views



You can create your own custom view on any object (Orders, Order Lines, Invoices, Catalogs)

- Click **Invoices** tab
- Select **Create View** option from View dropdown

The screenshot shows the myBuy interface with the 'Invoices' tab selected in the top navigation bar. Below the navigation bar, the 'Invoices' section is displayed, including instructions from the customer and a 'Create Invoices' button. A dropdown menu is open, showing various invoice statuses and the 'Create View' option, which is highlighted. Below the dropdown, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', and 'Create Blank Invoice'. At the bottom, there is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The table contains two rows of data.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Test Invoice 16	12/12/19	Pending Approval	None	2,030.00 USD	No	
None	12/12/19	Draft	None	0.00	No	

Creating Custom Views



- **Name** the view
- Select **Visibility** (Only Me will limit the view to yourself)
- Provide required **Conditions**
- Drag columns from **Available** to **Selected** as per requirement
- Select Sorting (if needed)
- Click **Save**

Create New data table view

General

Name

Visibility ☒ Only Me ☐ Everyone

Start with view

Conditions

Match Conditions

Filter By Filter Clause Filter Text

Add group of conditions

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order

Available Columns	Selected Columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Delivery Number	PO #
Dispute Reason	Total
Disputed Date	Unanswered Comments
Document Type	Actions
Invoice Date	
Linked Document	

Default Sort Order

Sort by in order

Cancel

Supplier Payment Information



- Click on Invoice Tab.
- Using the view, payment information, you can check on invoice payment status.
- The highlighted column paid will tell you whether you have been paid or not.
- You can also click into the invoice # to see more detailed information (cont. on slide 40).

Create Invoices ?

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

Export to View Payment Information

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	None	None	Draft	08/25/20	None	08/25/20	
No	None	None	Draft	08/25/20	None	08/25/20	
No	USA0000160	None	Draft	08/25/20	Z145 AP terms: 120 days net, Document date	08/21/20	
No	USA0000164	None	Draft	08/25/20	None	08/25/20	
No	USA0000160	USA942042	Approved	08/21/20	Z145 AP terms: 120 days net, Document date	08/21/20	
No	USA0000161	USA7492	Pending Approval	08/21/20	None	08/21/20	

Supplier Payment Information



- Scroll down to bottom for payment information and click the arrow to review more details.

Add Comment

Payments

Status Pending Document Approval

Paid-in-Full Date None

Payment Reconciliation Details

Status	Date	Type	Description	Amount
			Total Reconciled	0.00
			Invoice Total	10.00
			Remaining Balance	10.00

History

>

Next Steps for CSP Enablement



- Make sure to accept the Coupa Supplier Portal email invitation
- Verify and complete CSP profile and account information after invitation acceptance, along with any information update requests
- Review training and onboarding materials and communications, completing requested supplier information confirmation or updates
 - i.e. Primary Contact information, PO email, required certifications or documentation
- Align with your Accounts Receivable team for invoicing, if you have not already
- Contact the Clorox Procurement Team to begin punchout or hosted catalog set up *prior* to adding any catalog information in the CSP: SupplierCSP@Clorox.com
 - Catalog maintenance processes will be provided as part of enablement
 - If you are using a hosted catalog, be sure to manage your CSV file going forward and follow Clorox's Coupa Add/Update Items Process for any catalog changes.

Additional Resources



- General Information:

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/03_CSP_Videos

- Coupa Supplier Portal Log In: <https://supplier.coupahost.com/>
- Supplier Enablement: Contact Clorox's Coupa Procurement Team to set up a punchout or hosted catalog:
SupplierCSP@Clorox.com
- If you require any further information, contact Clorox's supplier enablement team @ SupplierCSP@Clorox.com