

INTUIT



turbotax



credit karma



quickbooks



mailchimp

# Coupa Supplier Portal Supplier Guides

Version 1.1

# Coupa Supplier Portal - An Overview

The Coupa Supplier Portal is Intuit's preferred platform for our valued suppliers to view their purchase orders, create invoices, track payment status, and more. Access and use of the portal is free.

Suppliers for **Intuit US and Canada** can also use the portal to submit invoices directly. All other suppliers should continue to [submit invoices via email](#) to the app

# Table of Contents

*Click the title to see each guide*

[How to Add Users](#) (pages 4-6)

[How to view your Intuit PO](#) (pages 7-8)

[How to Create Legal Entity](#) (pages 9-14)

[How to submit an invoice](#) (pages 15-21)

[How to view your invoice and payment status](#) (pages 22-26)

[Additional Support](#) (page 27)

INTUIT



turbotax



credit karma



quickbooks



mailchimp

# Coupa Supplier Portal

## How to Add Users

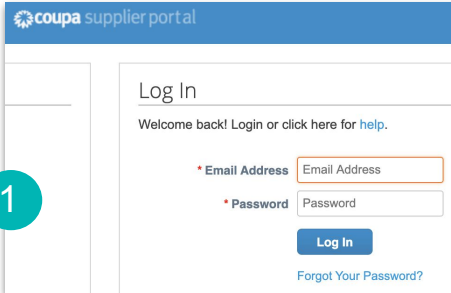
## Supplier Guide: How to Add Users

This guide will provide Suppliers with step-by-step guidance on how to add additional users to the CSP.

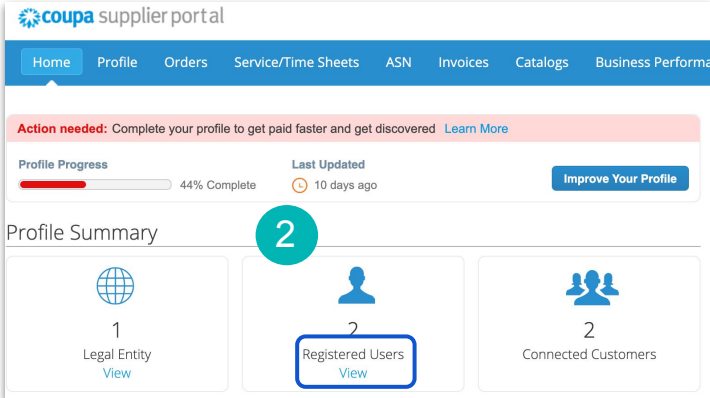
**Step 1:** Log into Coupa Supplier Portal through:

<https://supplier.coupahost.com/sessions/new>

**Step 2:** From the **Home** tab, click **View** in the Registered Users box



The screenshot shows the 'Log In' page of the Coupa Supplier Portal. The page has a blue header with the 'coupa supplier portal' logo. Below the header, there is a 'Log In' section with the text 'Welcome back! Login or click here for help.' There are two input fields: 'Email Address' and 'Password'. A blue 'Log In' button is positioned below the fields. A link for 'Forgot Your Password?' is located at the bottom right of the login section. A red circle with the number '1' is overlaid on the left side of the page.



The screenshot shows the 'Home' page of the Coupa Supplier Portal. The page has a blue header with the 'coupa supplier portal' logo and a navigation menu with tabs for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. Below the header, there is a red banner with the text 'Action needed: Complete your profile to get paid faster and get discovered. Learn More'. Below the banner, there is a 'Profile Progress' section with a progress bar showing 44% Complete and a 'Last Updated' section showing '10 days ago'. A blue 'Improve Your Profile' button is located to the right of the 'Last Updated' section. Below the profile progress, there is a 'Profile Summary' section with three boxes: '1 Legal Entity View', '2 Registered Users View', and '2 Connected Customers'. A red circle with the number '2' is overlaid on the 'Registered Users' box.

**Step 3:** Here you will see all of your current users. To add an additional user click **Invite User**

**Step 4:** Enter user's information and set their permissions.

**Note:** We recommend you give all of the permissions to all of your users for ease of use.

3

Invite User

Users	Permissions	Customer Access
Harita Weisbard <a href="mailto:harita_weisbard@intuit.com">harita_weisbard@intuit.com</a> Status: Active <input type="button" value="Edit"/>	ASNs Admin Business Performance Catalogs Invoices Order Changes	INTUIT - HACKETT GROUP INC THE-1001 BRICKELL (US-USD-MIA) INTUIT - HACKETT GROUP INC THE-1000 ABERNATHY (US-USD-ATL)

4

## Invite User

First Name

Last Name

\* Email

x

Permissions ?

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Customers

All

INTUIT - HACKETT GROUP INC THE-10

INTUIT - HACKETT GROUP INC THE-10

**INTUIT**



turbotax



credit karma



quickbooks



mailchimp

# Coupa Supplier Portal

## How to view your Intuit Purchase Order

## Supplier Guide: How to view your Intuit Purchase Order(s)

This guide will provide Suppliers with step-by-step guidance on how to view Purchase Orders (POs) in the CSP

**Step 1:** Log into Coupa Supplier Portal through:

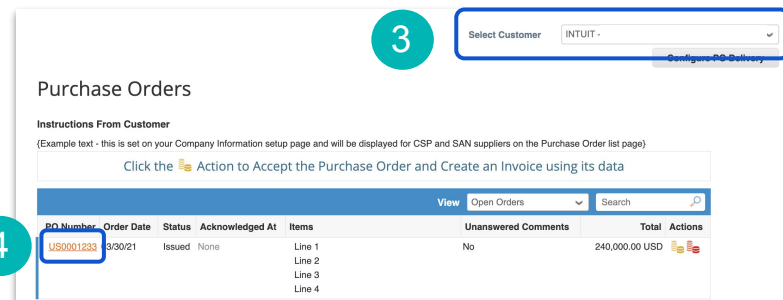
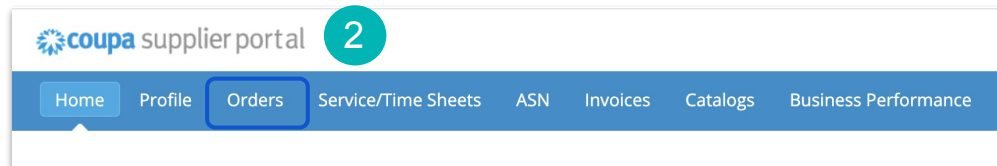
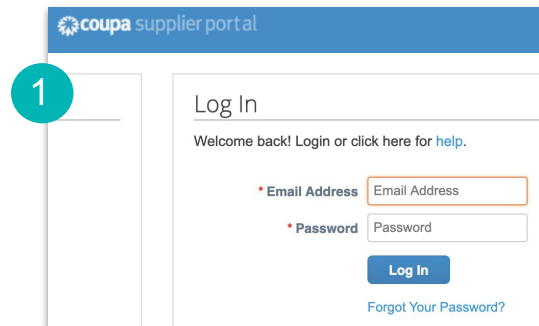
<https://supplier.coupahost.com/sessions/new>

**Step 2:** Click on **Orders**

This will bring you to a new page where you will be able to see all Purchase Orders.

**Step 3:** In the Select Customer area choose **Intuit**

**Step 4:** To view details of the Purchase Order, click on the **PO#**





INTUIT



# Coupa Supplier Portal

## How to Create Legal Entity

## Supplier Guide: How to Create Legal Entity

This guide will provide Suppliers with step-by-step guidance on how to create a Legal Entity in the CSP. **Note:** This is only applicable for US and Canada POs as we are currently not accepting invoices for purchases in other countries.

**Step 1:** Log into Coupa Supplier Portal through:

<https://supplier.coupahost.com/sessions/new>

**Step 2:** Click on **Setup**

**Step 3:** Under the Admin subtab, click on **Legal Entity Setup**

The image shows a sequence of three screenshots illustrating the steps to create a legal entity in the Coupa Supplier Portal. Step 1 shows the login page with fields for Email Address and Password, and a Log In button. Step 2 shows the main portal navigation menu with the Setup button highlighted. Step 3 shows the Admin Users page with the Legal Entity Setup link highlighted in the left sidebar.

**1** Log In

Welcome back! Login or click here for help.

\* Email Address

\* Password

Log In

**2** coupa supplierportal ANDREW | NOTIFICATIONS 5

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

**3** Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup


Admin Customer Setup Connection Requests

Admin Users Invite User

Users	Users	Permissions	Customer Access
<a href="#">Merge Requests</a> <a href="#">Legal Entity Setup</a>	Andrew Test andrewflard91+2@gmail.com Status: Active	ASNs Admin Business Performance Catalogues	INTUIT

**Step 4:** Click on **Add Legal Entity**

**Step 5:** Fill out the **Legal Entity Name** and the **Country/Region**, and then click **Continue**

**Step 6:** Fill out any additional Miscellaneous Information that is specific to the Country/Region (required fields will be marked with a \*). Hover over the  icon to learn specific details about a given field. When finished, click on **Save & Continue**



**Step 7:** Choose which of your linked customers can see the legal entity

**Step 8:** Fill out the **Address** and select if this will be used for the **Remit To Address**, **Ship-From Address**, or both (note: this address should be registered address of your legal entity)

**Step 9:** Fill out the the **VAT/GST ID** associated with your legal entity. When finished, click on **Save & Continue**

Tell your customers about your organisation

1 2 3 4

7 Which customers do you want to see this?

All

INTUIT

8 What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Post Code

Country/Region United Kingdom

Use this address for Remit To ⓘ

Use this for Ship-From address ⓘ

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location as where you receive government documents. ⓘ

9 What is your Tax ID? ⓘ

Country/Region United Kingdom

\* VAT ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code  ⓘ

Preferred Language English (UK)

Cancel [Save & Continue](#)

**Step 10:** Select the **Payment Type** for the listed Remit-To Address, and click **Save & Continue**

**Step 11:** Confirm the listed Remit-To Address (and click **Add Remit-to** to add any new addresses). Then, click **Next**

**Step 12:** Confirm the listed Ship-From Address (and click **Add Ship From** to add any new addresses). Then, click **Done**

10

Where do you want to receive payment?

1 2 3 4

\* Payment Type    
 Bank Account   
 Virtual Card

What is your Remit-To Address?

Address Line 1 100 Main St.   
 Address Line 2   
 City London   
 State   
 Post Code 13245   
 Country/Region United Kingdom

Cancel **Save & Continue**

11

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	
Address	100 Main St. London 13245 United Kingdom	Active	<b>Manage</b>

**Deactivate Legal Entity** Cancel **Next**

12

Where do you ship goods from?

1 2 3 4

For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered.

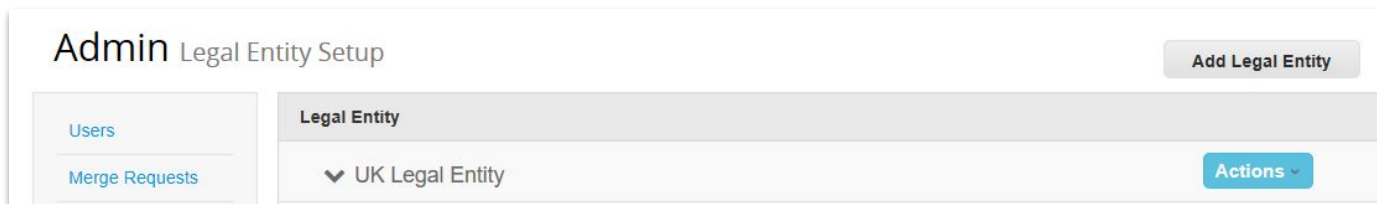
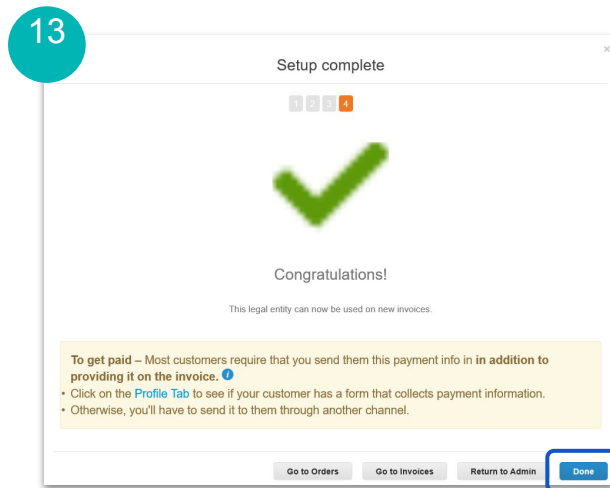
**Add Ship From**

Title	Status	
100 Main St. London 13245 United Kingdom	Active	<b>Manage</b>

**Deactivate Legal Entity** **Done**

**Step 13:** The new Legal Entity setup is now complete. Click **Done**

You will now see the new Legal Entity listed under Setup



INTUIT



turbotax



credit karma



quickbooks



mailchimp

# Coupa Supplier Portal

## How to Submit an Invoice

## Supplier Guide: How to Submit an Invoice

This guide will provide Suppliers with step-by-step guidance on how to submit an invoice in the CSP. **Note:** This is only applicable for US and Canada POs as we are currently not accepting invoices for purchases in other countries. For all other countries please continue to submit invoices via email.

**Step 1:** Log into Coupa Supplier Portal through:

<https://supplier.coupahost.com/sessions/new>

**Step 2:** Click on **Orders** to bring up a list of all of your purchase orders

**Step 3:** In the **Select Customer** drop down, select Intuit

**Step 4:** Click on the PO Number that the invoice applies to from the drop down list

**1** Log In

Welcome back! Login or click here for help.

\* Email Address

\* Password

Log In

**2** coupa supplier portal

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

**3** Select Customer INTUIT

Configure PO Delivery

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 Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
<b>US0001233</b>	09/30/21	Issued	None	Line 1 Line 2 Line 3 Line 4	No	240,000.00 USD	

**4**



**Step 5:** Scroll towards the bottom of the page to click **Create Invoice**

**Note:** If multiple legal entities are available for a supplier, a pop up will appear. Select the appropriate **Legal Entity** to create the invoice

5

Total USD **240,000.00**

**Create Invoice** Save Print View

Choose Invoicing Details

\* Legal Entity Select + Add New

\* Remit-To Select

\* Ship From Address Select


Cancel

**Step 6:** A new screen will automatically open. Enter **Invoice #** and **Invoice Date**


The **Payment Terms** and **Currency** will default from the PO

Attach a file of the invoice by clicking **Choose File** in the **Attachments** field. Acceptable file types include PNG, GIF, JPG, JPEG, PJPEG, TIFF, and PDF.


**Note:** Any fields with a red asterisk are required fields and must be populated in order to proceed


6  General Info

\* Invoice #

\* Invoice Date 11/18/22 

\* Payment Term Net 45

Date of Supply 11/18/22 


\* Currency INR 

Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

\* Attachments  [Add File](#) | [URL](#) | [Text](#)

Invoice Reference Number (IRN)

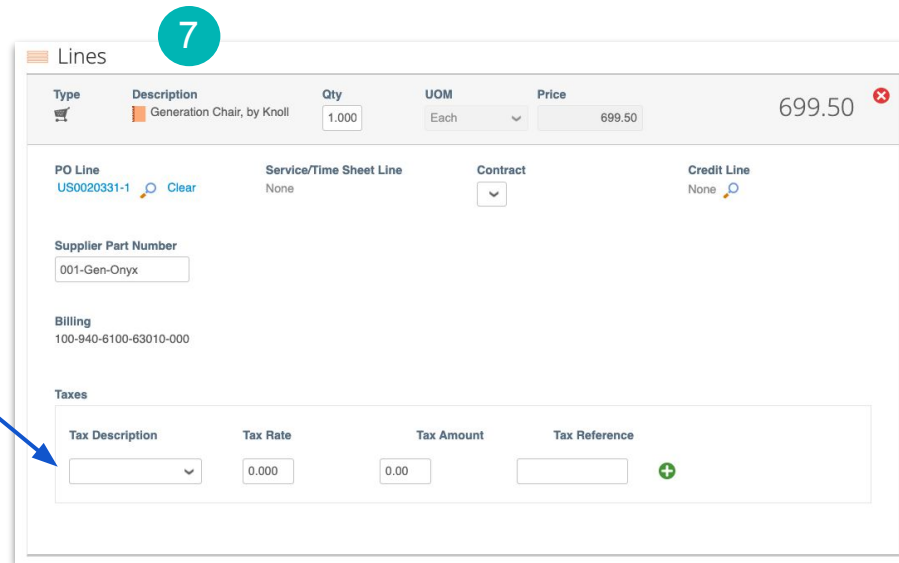
Signed QR Code

Place Of Supply

**Step 7:** You will now enter the amount to be invoiced - either in the **Price** field (for services) or in the **Qty** field if for goods (unit price will be needed to be provided as well). Please also include any relevant tax by line item

**Note:** The value will auto-populate with the current PO balance available for invoicing. It is important to **only invoice for actual goods shipped or services rendered** so please update accordingly

**Note:** For Canada suppliers, make sure to select an appropriate tax description and rate from the list provided



The screenshot shows the 'Lines' interface in the Coupa Supplier Portal. A red circle with the number '7' is positioned above the 'Qty' field. The interface displays the following information:

Type	Description	Qty	UOM	Price	
	Generation Chair, by Knoll	1.000	Each	699.50	699.50

PO Line: US0020331-1

Service/Time Sheet Line: None

Contract:

Credit Line: None

Supplier Part Number: 001-Gen-Onyx

Billing: 100-940-6100-63010-000

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	

**Step 8:** Once each of the invoice lines are updated enter shipping and miscellaneous charges (including any related tax) as they apply to this invoice

**Step 9:** Click **Calculate** which will update the **Total** amount due. Updates will be reflected on each line and additional charges will populate

**Step 10:** When you are ready to send, click **Submit**

**Totals & Taxes**

Lines Net Total	240,000.00
Lines Tax Totals	0.00

---

Shipping

Tax  %  0.000

Tax Reference

---

Misc

Tax  %  0.000

Tax Reference

---

Total Tax 0.00

Net Total 240,000.00

**Total 240,000.00**

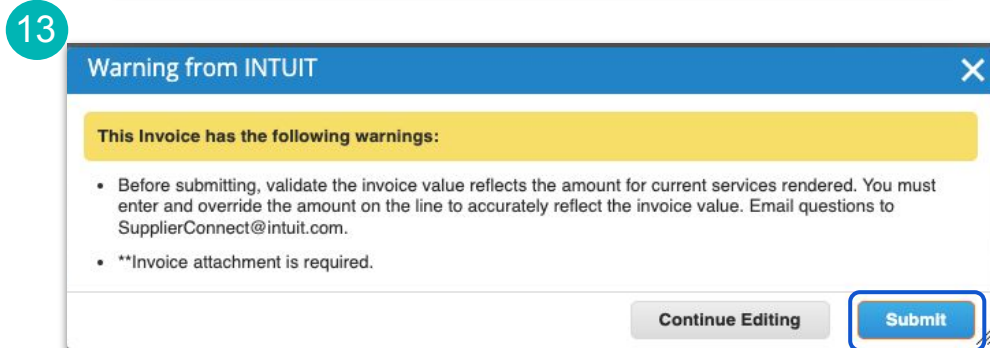
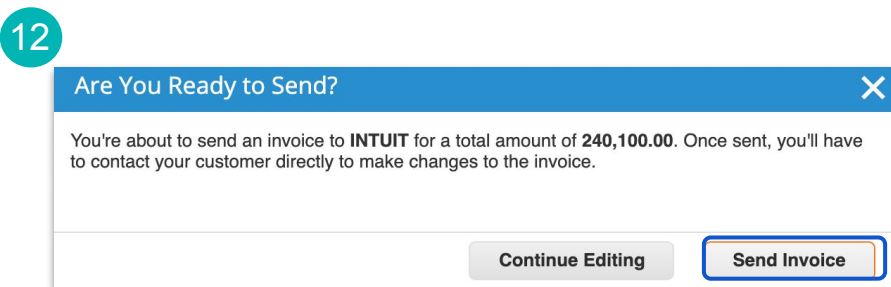
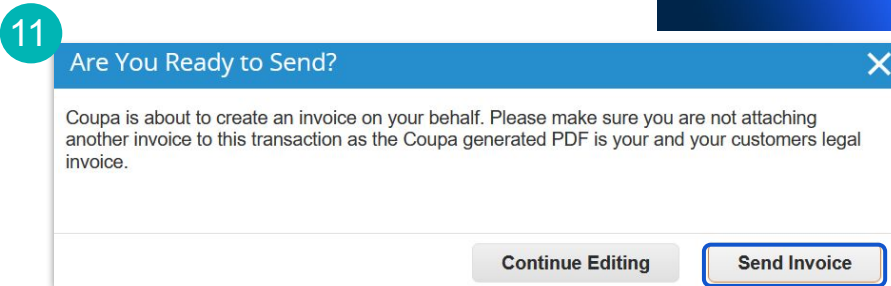
Delete Cancel Save as Draft **Calculate** **Submit**

**Step 11:** A pop up will appear telling suppliers not to include an attachment. **Disregard this message as Intuit requires an invoice attachment.** Click **Send Invoice**

**Step 12:** A pop up will appear with the invoice amount. Make sure the amount matches as it's shown on your invoice. If the invoice information is correct, click **Send Invoice**

**Step 13:** A warning message will appear. Please ensure that the value of the invoice reflects the amount of goods shipped or services rendered. Once confirmed, select **Submit**

**Note:** You have now submitted an invoice to Intuit which our AP team will process. They will reach out to you if there are any questions



INTUIT



turbotax



credit karma



quickbooks



mailchimp

# Coupa Supplier Portal

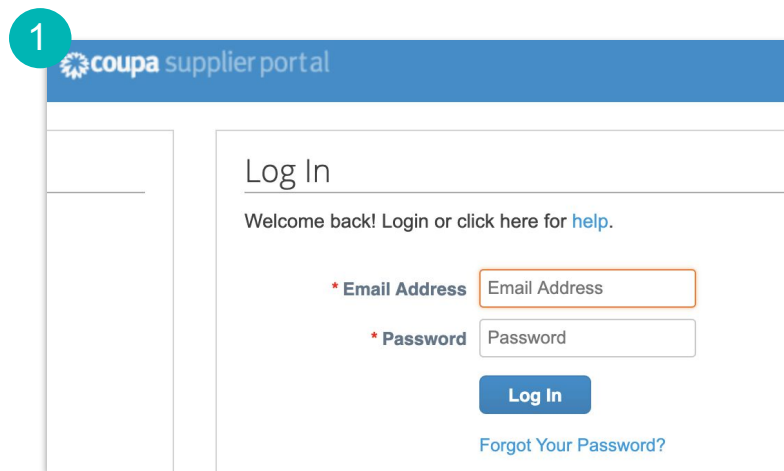
## How to Check Invoice & Payment Status

## Supplier Guide: How to view invoice and payment status

This guide will provide Suppliers with step-by-step guidance on how to view invoices in the CSP as well as how to see payment details once applied. **Note:** All Suppliers can use this option to view invoices even if submitted via email. Invoices will be viewable in Coupa once uploaded by Intuit AP.

**Step 1:** Log into Coupa Supplier Portal through:  
<https://supplier.coupahost.com/sessions/new>

**Step 2:** Click on **Invoices**



1

coupa supplier portal

Log In

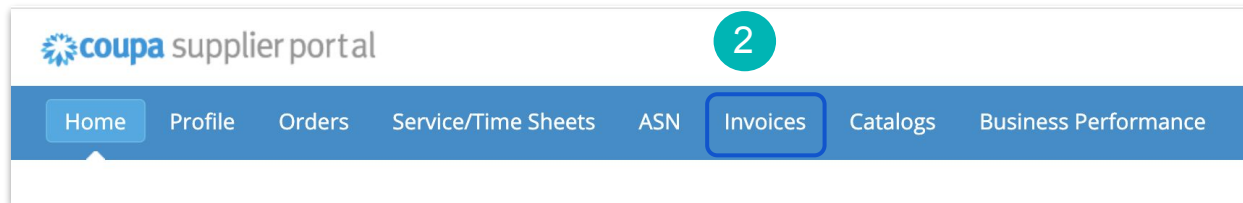
Welcome back! Login or click here for [help](#).

\* Email Address

\* Password

Log In

[Forgot Your Password?](#)



**Step 3:** On the Invoices tab, you can view Invoices that have been submitted through Coupa Supplier Portal. The Status column will show you the status of the invoice.

**Note:** Be sure to select the appropriate Customer

### Invoice Status and Description:

- **Approved:** The invoice has been accepted for payment by Intuit
- **Disputed:** The invoice has been disputed
- **Draft:** The invoice has been created, but it has not been submitted to Intuit yet
- **Pending Approval:** The invoice is currently under review by Intuit
- **Processing:** The invoice is being processed by the AP department and should be paid soon
- **Voided:** Something is wrong with the invoice and Intuit had to Void the invoice

The screenshot shows the Coupa Supplier Portal interface. The 'Invoices' tab is selected in the top navigation bar. A 'Select Customer' dropdown menu is set to 'INTUIT'. A green notification bar indicates 'Invoice deleted'. Below this, there are instructions from the customer and buttons to create invoices from PO, Contract, Blank Invoice, or Credit Note. The table below shows a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
1.6 Payment Request Test	01/06/22	Pending Approval	None	1,200.00 USD	No		
HackettPassiveTest	12/16/21	Approved	US0008588	2,543.40 USD	No		
invest2	11/17/21	Voided	US0008534	3,500.00 USD	No		
Test_Project_NONPO	09/21/21	Pending Approval	None	25,000.00 USD	No		
Test3CM	09/16/21	Approved	US0007996	10,000.00 USD	No		
Test1CGDA	09/16/21	Approved	US0007994	10,000.00 USD	No		
Test4_NonPOInvoice	09/13/21	Approved	None	20,000.00 USD	No		
12345	09/13/21	Approved	US0007984	2,500.00 USD	No		
5050	08/27/21	Approved	US0007915	25,000.00 USD	No		



## Step 4: In the **View** dropdown, select **Payment Information**

The current view will update to display new fields including **Invoice Date**, **Payment Terms** and **Payment Information** (if paid)

**Step 5:** to view further details about a specific invoice, click on the Invoice # in blue

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 5   View   Payment Information   Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	US0007995	Concentrix training	Pending Approval	03/18/22	Net 45	03/21/22	
No	US0008534	Toler test 2	Pending Approval	03/16/22	Net 45	03/16/22	
No	US0008565	Toler test 1	Pending Approval	03/16/22	Net 45	03/16/22	
No	US0008614	CPA Academy training	Pending Approval	03/11/22	Net 45	03/15/22	
No	US0008615	Outofthebox training	Pending Approval	03/13/22	Net 45	03/15/22	
No	US0008681	Sykes training	Pending Approval	03/11/22	Net 45	03/11/22	
No	US0008822	None	Draft	03/02/22	Net 45	03/02/22	
No	US0008818	Catalog testing	Pending Approval	03/02/22	Net 45	03/02/22	
No	None	1.6 Payment Request Test	Pending Approval	01/06/22	Net 45	01/06/22	
No	US0008588	HackettPassiveTest	Approved	12/16/21	Net 45	12/16/21	
No	US0008534	invest2	Voided	11/17/21	Net 45	11/17/21	
No	None	Test_Project_NONPO	Pending Approval	09/21/21	Net 45	09/21/21	
No	US0007996	Test3CM	Approved	09/16/21	Net 45	09/16/21	
No	US0007994	Test1CGDA	Approved	09/16/21	Net 45	09/16/21	
No	None	Test4_NonPOInvoice	Approved	09/13/21	Net 45	09/13/21	
No	US0007984	12345	Approved	09/13/21	Net 45	09/13/21	
No	US0007915	5050	Approved	08/27/21	Net 45	08/27/21	
No	US0007908	123456	Approved	08/26/21	Net 45	08/26/21	
No	None	Test12345	Voided	None	Net 45	None	
Yes	US0000638	116741	Approved	06/10/21	Net 45	06/14/21	Payment# - on 07/21/21 for USD 60,000.00
Yes	US0000001	115726	Approved	04/02/21	Net 45	04/06/21	Payment# - on 06/03/21 for USD 66,400.00
Yes	US0000001	115435	Approved	03/18/21	Net 45	03/26/21	Payment# - on 05/12/21 for USD 155,000.00

Per page 15 | 45 | 90

**Step 6:** To view payment details, scroll down to Payments section and click the  arrow icon

If the invoice is paid, you will see payment details including **Date** and **EFT tracking number**

In this example, the invoice has been paid. If it is not paid the details will be blank

Payments
6

---

Status Externally Paid

Paid-in-Full Date 07/21/21

Payment Notes EFT#10417228|USDI60000

Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted	07/21/21	Payment		60,000.00
<b>Total Reconciled</b>				<b>60,000.00</b>
<b>Invoice Total</b>				<b>60,000.00</b>
<b>Remaining Balance</b>				<b>0.00</b>

Invoice #116741 [Back](#)

**General Info**

Invoice # 116741  
 Invoice Date 06/10/21  
 Payment Term Net 45  
 Currency USD  
 Status Approved  
 Shipping Term None  
 Invoice PDF Document [download](#)  
 Image Scan [57808-IntlInc-Invoice-116741.pdf](#)  
 Supplier Notes None  
 Attachments None

**Bill To & Ship To**

Supplier HACKETT GROUP INC THE-1001 BRICKELL US-USD-MIA  
 Invoice From None  
 Remit To None  
 Ship From None  
 Supplier Tax ID 66-0750100  
 Customer INTUIT  
 Bill To Address Intuit Inc  
 27935 Upgrade street  
 27935 Upgrade street2  
 San Mateo, CA 11111  
 United States  
 VAT ID VAT11111  
 Buyer Tax ID None

---

**Lines**

Line	Description	Supplier Part Number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line
1	Services due per attached contract for Consulting June PZ1						60,000.00	60,000.00	None

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.0%	0.00	

---

**Totals & Taxes**

Lines Net Total	60,000.00
Lines Tax Totals	0.00
Shipping	0.00
Misc	0.00
Total Tax	0.00
Net Total	60,000.00
<b>Total</b>	<b>60,000.00</b>

---

**Comments** [Mute Comments](#)

Enter Comment

Send Comment notification to a user by typing @name (ex. @JohnDoe)

Attachments [Add File](#) | [URL](#)

[Add Comment](#)

---

Payments
>

# Additional support

Visit our [Supplier Programs](#) site for additional information and reference guides.

You can also reach out to us at [SupplierConnect@Intuit.com](mailto:SupplierConnect@Intuit.com).