



**Aon Supplier Enablement**

# **Coupa Supplier Training Materials**

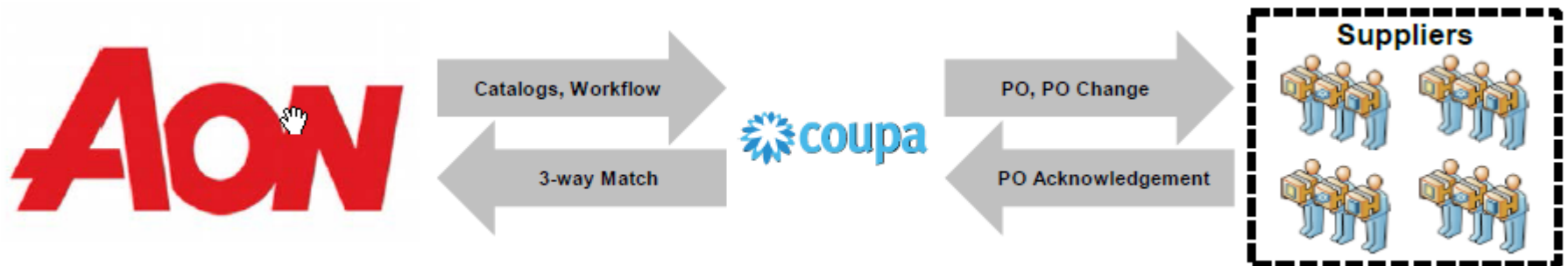
2018

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## Overview

- Coupa is an online P2P platform, which aim is to connect buyers with suppliers in order to improve communication and cash flow.
- It is used by Aon to purchase goods and services, create and send purchase orders and to receive invoices from suppliers.
- The Coupa Supplier Portal is a tool designed for suppliers in order to enable control over incoming purchase orders, facilitate invoicing and to guarantee visibility into invoices status.
- The Coupa Supplier Portal is free of charge, there are no additional costs for suppliers.



## Additional Resources

Important sites and contacts:

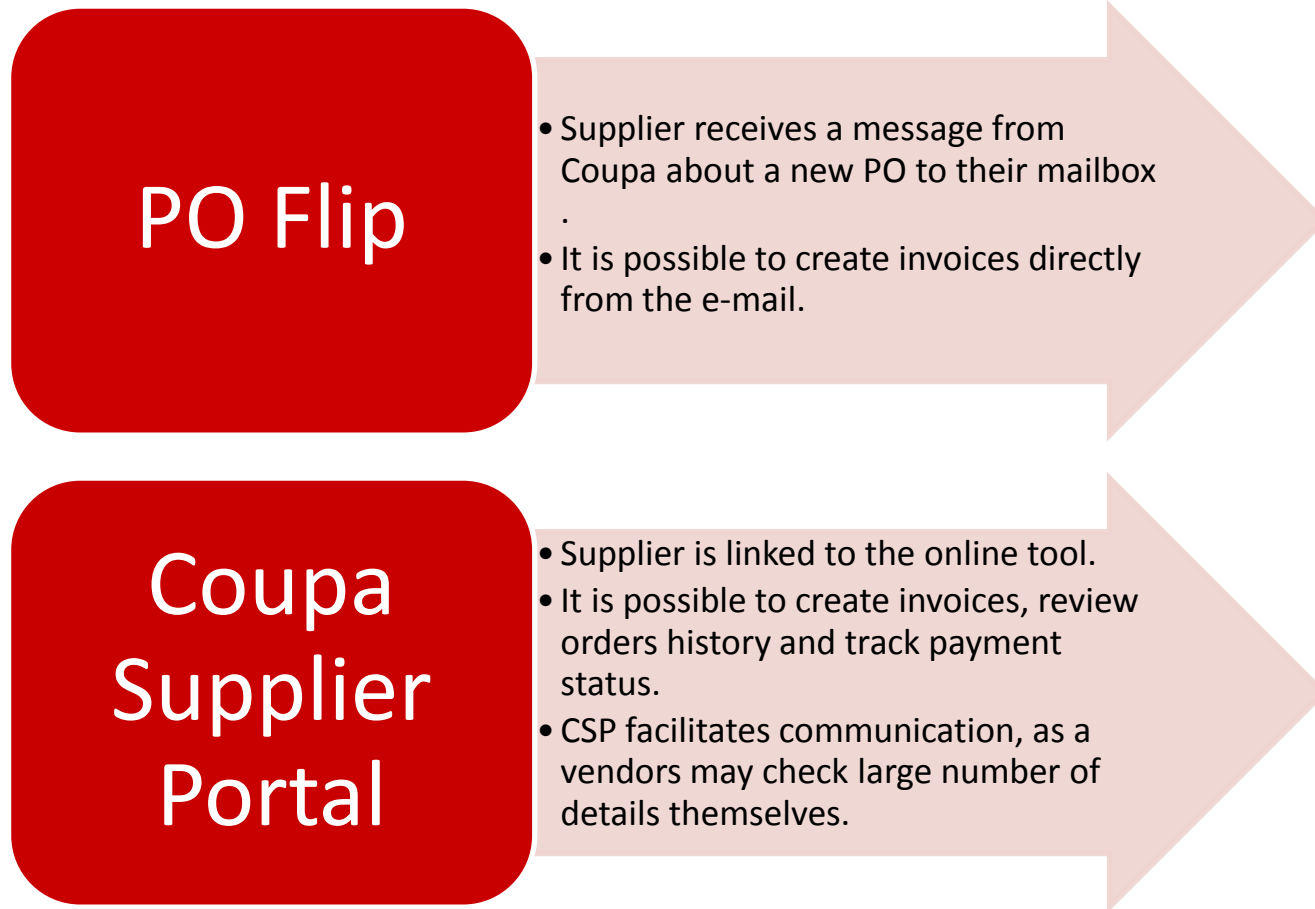
- General Information: [www.aon.com](http://www.aon.com) > About Aon > Supplier Information

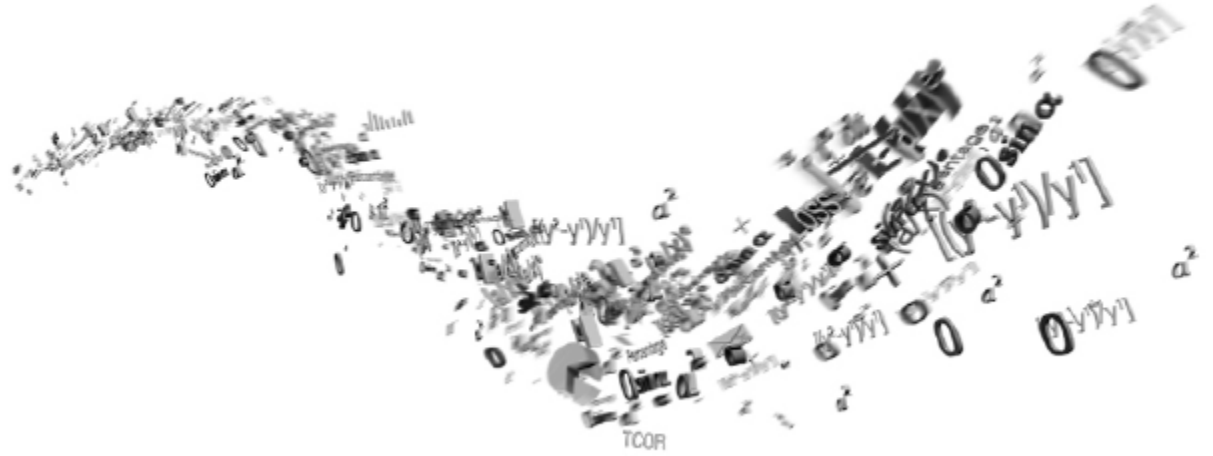
For any issues and questions regarding Coupa Supplier Portal and invoices and payments: Global Spend Management Helpdesk [gsmhelpdesk@aon.com](mailto:gsmhelpdesk@aon.com)

- Coupa resources for suppliers: <https://success.coupa.com/Suppliers>

## Invoicing Options

- Vendors have to options to integrate with Coupa electronically and submit their invoices.





# PO Flip

# PO Flip

- Using this option, you will receive a Purchase Order to the indicated e-mail address.
- In the message there are buttons which allow you to take an action.
- It is not possible to create a credit note using PO flip.

• Aon UK Limited Purchase Order #N02461000080754

 • Aon <do\_not\_reply@aon-sandbox.coupathost.com>  
To: CSPTS@yahoo.com

  25

Aon UK Limited Purchase Order #N02461000080754

Create Invoice

Acknowledge PO

Add Comment



## Aon UK Limited PURCHASE ORDER

### CSPTS

PO Box 12345  
Chicago, Illinois 6789  
Red City,  
Attn: Supplier Name Supplier Surname  
CSPTS@yahoo.com

PO NUMBER	N02461000080754
DATE	05/25/18
PAYMENT TERMS	45D
SHIPPING TERMS	Best Way
CURRENCY	EUR
CONTRACT	
CONTACT	Agata Dobromilska agata.dobromilska@aon.pl

### Ship To

Aon UK Limited  
1463 Upgrade street  
San Mateo, 11111  
POL04X01  
Attn: Agata Dobromilska

### Bill To

Aon UK Limited  
The Aon Centre, The Leadenhall  
Building  
122 Leadenhall Street  
London, EC3V 4AN  
Attn: UK Accounts Payable Team

Line Description	Qty	Unit	Price	Total
1 Travel Service			123.00	123.00
			<b>123.00</b>	<b>EUR</b>

- **“Create Invoice”** – allows to create an invoice directly from this message.
- **“Acknowledge PO”** – lets a requester know that a supplier received this message – not obligatory.
- **“Add Comment”** – if something is wrong or if supplier wants to notify a requestor about something.




## PO Flip – create an invoice

- After clicking a “**Create Invoice**” button, you are automatically transferred to Create Invoice view in Coupa.
- You can add attachments (e.g. an excel file) or scan of an invoice. If necessary, please attach a scan in the “image scan” section in PDF.

**General Info**

\* Invoice #

\* Invoice Date  

Payment Term 45D


\* Currency

Delivery Number

Status Draft

Image Scan  No file selected.

Supplier Note

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

**From**

\* Supplier CSPTS-US

Supplier Tax ID

\* Invoice From Address CSPTS-US  
Address St  
City, AB1234  
United States

\* Remit-To Address CSPTS-US  
Address St  
City, AB1234  
United States

\* Ship From Address CSPTS-US  
Address St  
City, AB1234  
United States

**To**

Customer Aon

\* Bill To Address The Aon Centre, The Leadenhall  
Building  
122 Leadenhall Street  
London  
EC3V 4AN  
United Kingdom

Buyer Tax ID

Ship To Address 1463 Upgrade street  
San Mateo, 11111  
United States  
Location Code: POL04X01

- Remit-To Address and Ship From Address have to be chosen by a supplier.
- When creating an invoice for the first time, the system will ask you to create a Remit-To address.
- If you have only one Remit-To, it will be set as a default.



## PO flip– create invoice

Lines

Type	Description	Price
Travel Service		123.00

PO Line: N02461000080754-1

Contract:

Period:

Supplier Part Number:

Commodity: Travel Agency

Billing Notes:

Billing: Not Required-Use Accounting Treatment-25000:RMS Centre-Travel Agency-Expensed-TRAVEL\_AGENCY

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
US: USSLT - 0.0%			
US: USSLT1 - 0.0%			

Add Tag

Add Line

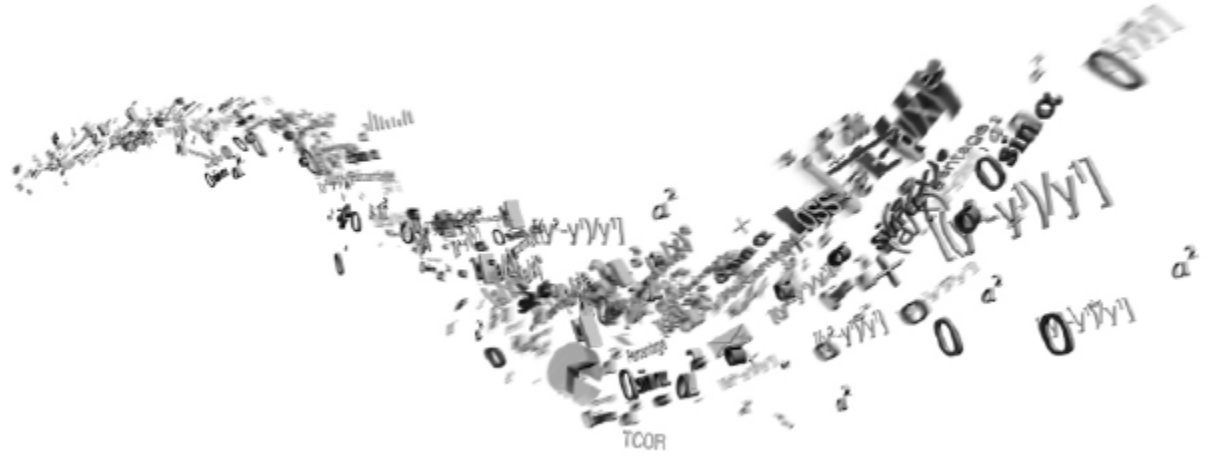
Totals & Taxes

Subtotal	123.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Total Tax	0.00
<b>Total</b>	<b>123.00</b>

- Every PO line stands for different product ordered.
- To invoice a PO partially:
  - Change quantity (for a quantity based PO) or price (for a service based PO).
  - Delete chosen line.
- For taxation you can:
  - Enter a general Tax in “**Tax Description**” at the bottom of the page – it will be applicable to all the lines.
  - Select “**Line Level Taxation**” to choose different tax rate for each line. For some countries line level taxation is required and in such a case, a vendor does not see a general tax field.
- For each country there are different rates available. For U.S. the only rate is 0% and then a vendor has to enter the tax rate himself.
- For suppliers from certain regions a word “**Tax Description**” is substituted with “**VAT Rate**”.

**Remember to always click “Calculate” after changing any value on an invoice.**

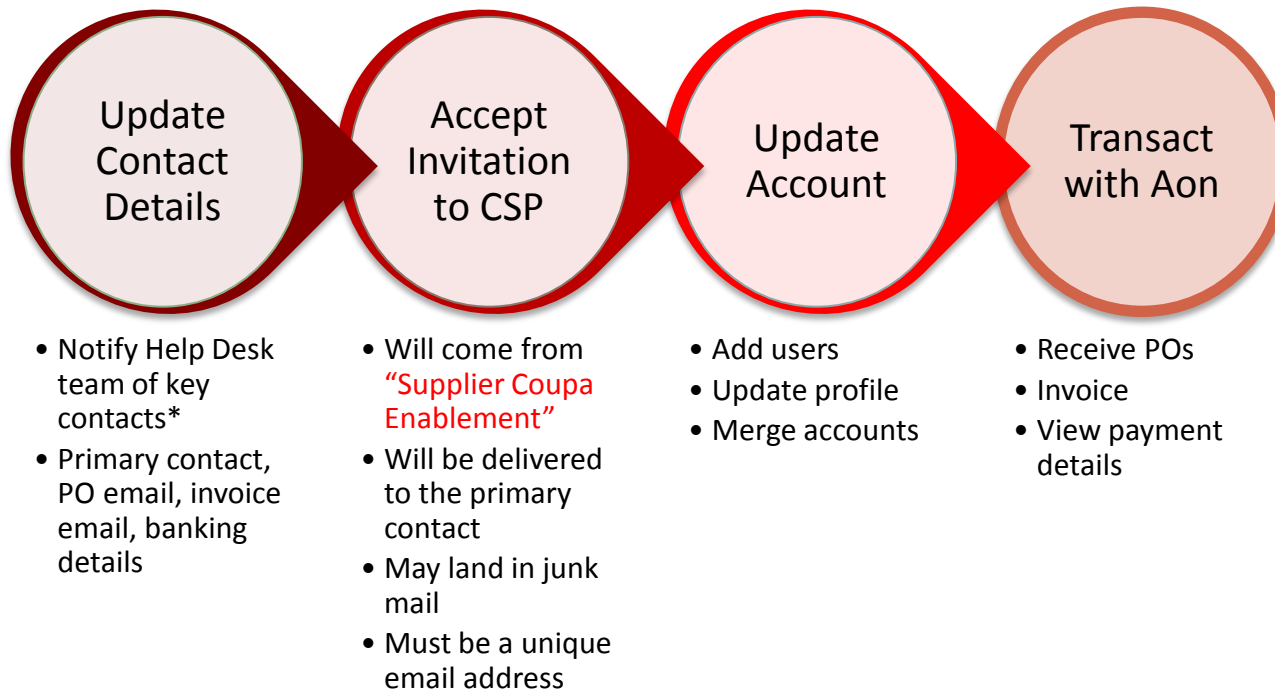
You can delete this invoice, save it as draft or submit it to your client.

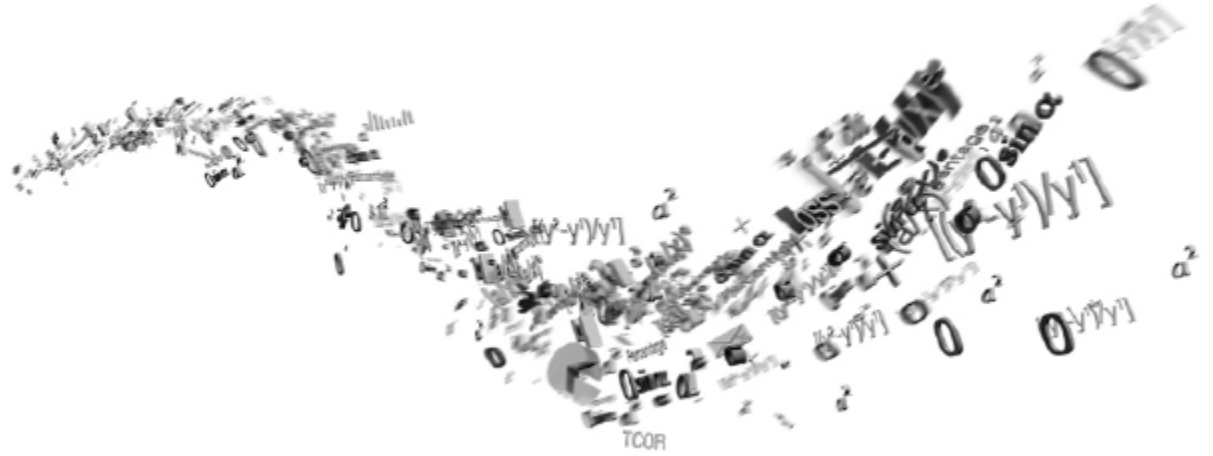


# How to connect to CSP?

## How to get connected to CSP?

- Each of the below steps must happen before a supplier can properly interact with Aon:





# Profile update


## Profile update


- Information included in your profile is visible in the main page when you log in to CSP.


[Home](#) [Profile](#) [Orders](#) [Service/Time Sheets](#) [ASN](#) [Invoices](#) [Catalogs](#) [Admin](#)


Profile


### CSPTS-US




 About

 Industry

 Website

 Established

 Employees

CSPTS covers organising domestic and...  
Travel agency activities  
<http://cspts.com>

1992  
100-499

Edit Background

Edit Profile

#### About

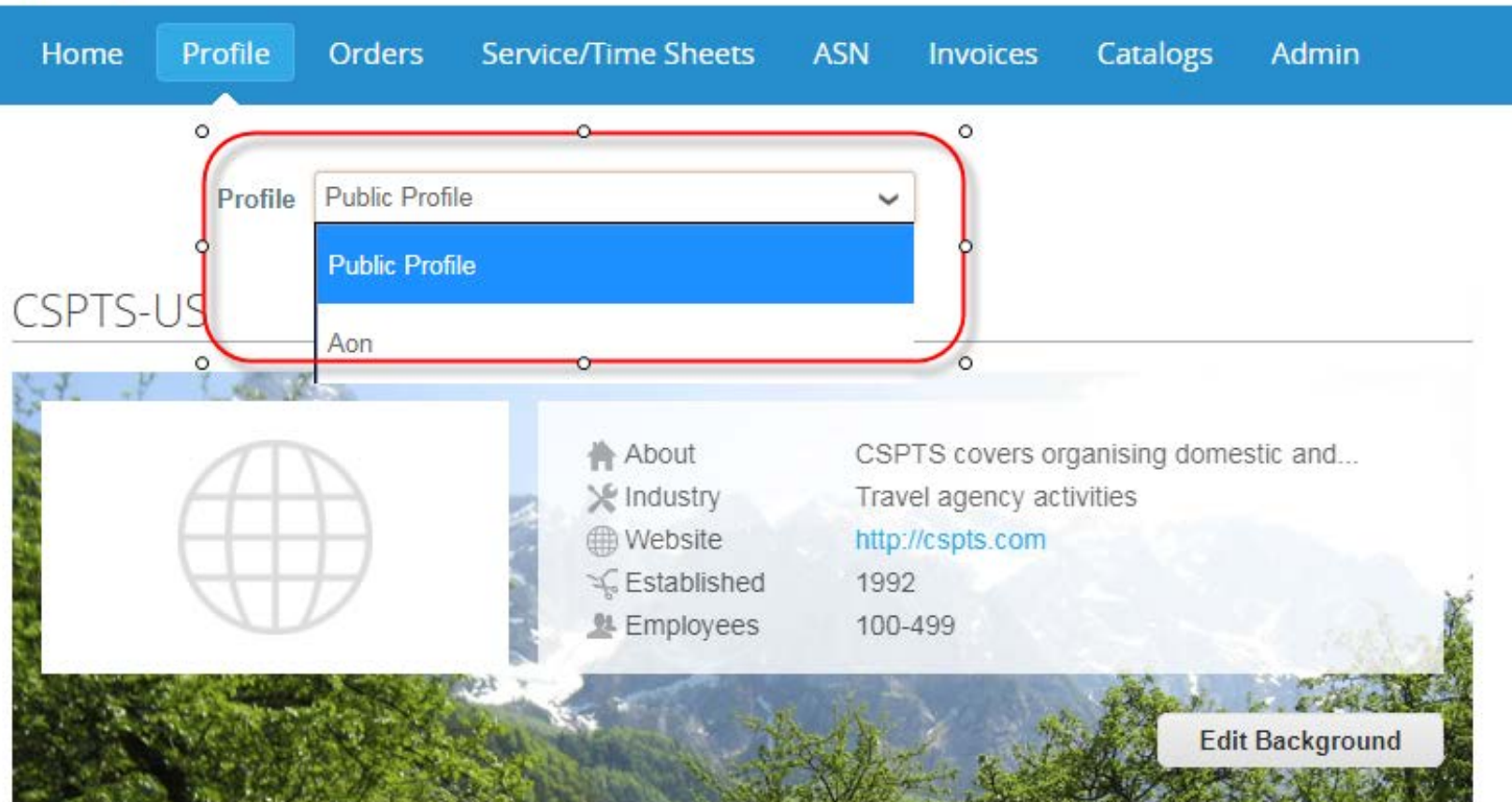
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CSPTS covers organising domestic and overseas business trips

## Profile update

- You can set up your profile as public or adjust it to each client separately.
- Address and contact information can be updated directly via CSP. Only bank details cannot be changed this way.

 coupa supplier portal



The screenshot shows the Coupa Supplier Portal interface. At the top is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. The 'Profile' link is highlighted. Below the navigation bar, a red rounded rectangle highlights a dropdown menu. The dropdown is labeled 'Profile' and shows 'Public Profile' as the selected option, with 'Aon' listed below it. The main content area features a large background image of a mountain landscape. On the left, there is a globe icon. To the right of the globe, there is a list of links: About, Industry, Website, Established, and Employees. Next to these links, there is descriptive text: 'CSPTS covers organising domestic and... Travel agency activities', the website URL 'http://cspts.com', and the years '1992' and '100-499'. At the bottom right of the main content area, there is a button labeled 'Edit Background'.


Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

Profile Public Profile

Public Profile

Aon

CSPTS-US



About  
Industry  
Website  
Established  
Employees

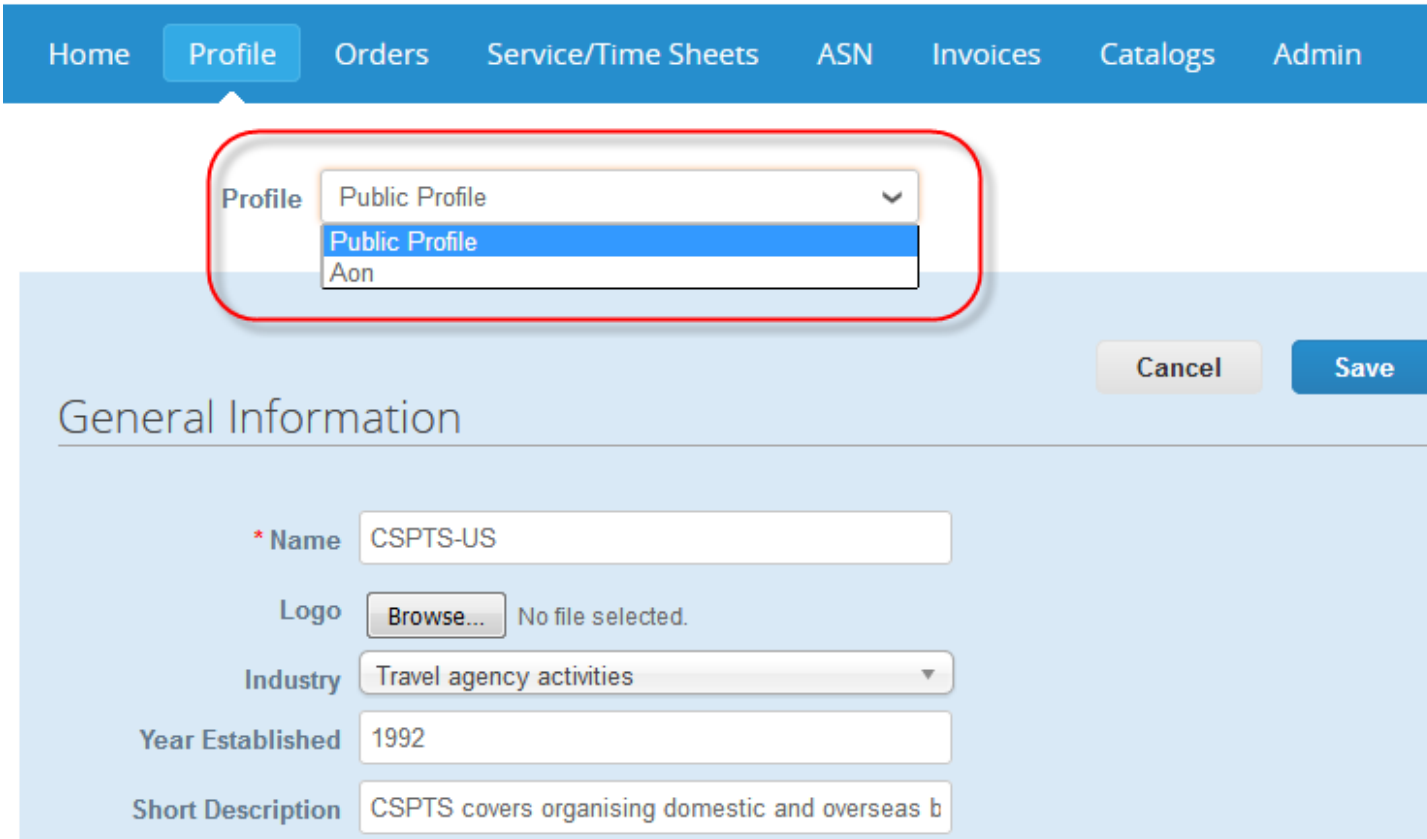
CSPTS covers organising domestic and...  
Travel agency activities  
<http://cspts.com>  
1992  
100-499

Edit Background

## Profile update

- Choosing “**Edit profile**” you can update general information about your company.
- Here you can choose if you update your public profile or one visible for a specific client.
- Obligatory fields are marked with a red asterisk (e.g. Name, Address, Primary Contact).

 coupa supplier portal



Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

Profile

Public Profile

Public Profile

Aon

Cancel Save

### General Information

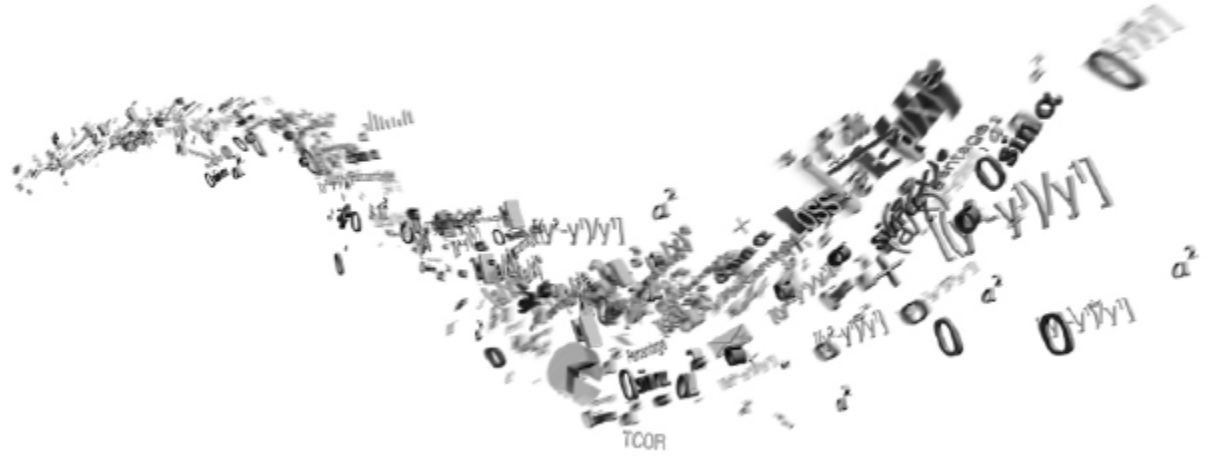
\* Name CSPTS-US

Logo  No file selected.

Industry Travel agency activities

Year Established 1992

Short Description CSPTS covers organising domestic and overseas b



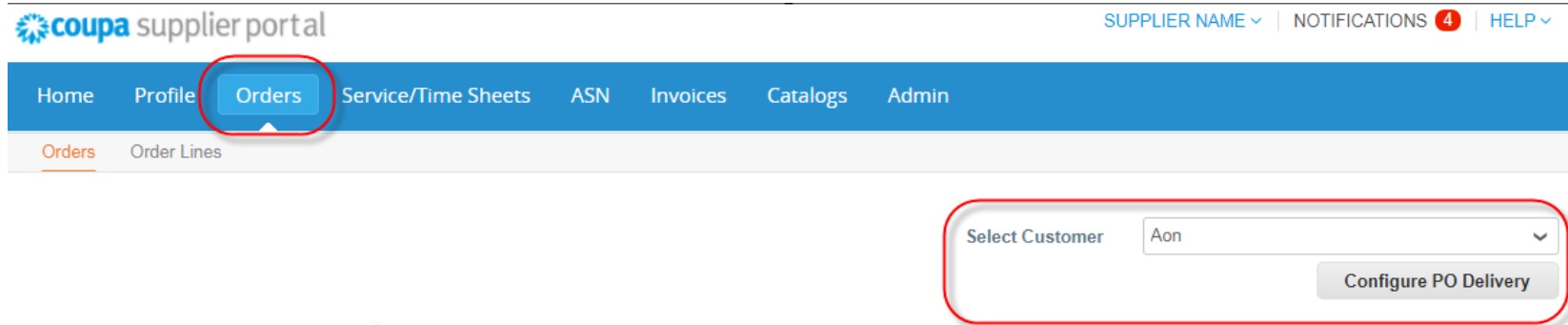
# Receive & view orders



## Receive & view orders

- Click “**Orders**” in the menu bar - you can review Purchase Orders you received
- You can choose to review orders from your different customers.
- Here you can also Configure PO Delivery – if you are interested in this option please contact

**[gsmhelpdesk@aon.com](mailto:gsmhelpdesk@aon.com)**



coupa supplier portal

SUPPLIER NAME ▾ | NOTIFICATIONS 4 | HELP ▾













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

Orders Order Lines

Select Customer Aon ▾

Configure PO Delivery









### Purchase Orders

Instructions From Customer							
Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.							
					View	All ▾	Search 🔍
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
N02461000080760	05/28/18	Issued	None	10 Each of Travel magazines	No	90.00 EUR	  
N02461000080759	05/28/18	Issued	None	2 Each of travel equipment	No	1,000.00 EUR	  
N02461000080758	05/28/18	Issued	None	5 Each of Tourism Books	No	150.00 EUR	  
N02461000080754	05/25/18	Issued	None	Travel Service	No	123.00 EUR	  

## Receive & view orders

- Select a relative PO by clicking on its number in “**PO Number**” column.
- Use the search menu to find the PO.

## Purchase Orders

Instructions From Customer								
Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.								
						View	All	Search
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions	
N02461000080760	05/28/18	Issued	None	10 Each of Travel magazines	No	90.00 EUR		
N02461000080759	05/28/18	Issued	None	2 Each of travel equipment	No	1,000.00 EUR		
N02461000080758	05/28/18	Issued	None	5 Each of Tourism Books	No	150.00 EUR		
N02461000080754	05/25/18	Issued	None	Travel Service	No	123.00 EUR		

## Receive & view orders

Purchase Order #N02461000080759

Status Issued - Sent via Email

Order Date 05/28/18

Revision Date 05/28/18

Requester Agata Dobromilska

Email agata.dobromilska@aon.pl

Payment Term 45D

Attachments None

**Acknowledged** ☐

**Shipping**

Ship-To Address 1463 Upgrade street  
San Mateo, 11111  
United States  
Location Code: POL04X01  
Attn: Agata Dobromilska

Terms Best Way

**Lines**

Type	Item	Qty	Unit	Price	Total	Invoiced
1	travel equipment	2	Each	500.00	1,000.00	0.00

Part Number  
None

Per page 15 | 45 | 90

Total 1,000.00 EUR

Create Invoice Save Print View



- You can check PO details and shipping address.
- Click the “**Acknowledged**” checkbox to notify customer that you have received the PO.
- The “**Invoiced**” section tells you if some part of the PO has already been invoiced or not (in case of multiple invoices).
- Click on “**Advanced**” button to filter the order lines.
- By using “**Sort by**” you can adjust the lines view by sorting them.

You can also:

- Print the PO
- Create invoice directly from this page
- Add a comment for a requestor


## Receive & view orders – create invoice

- To create invoice, click a gold coin icon in the column on the right OR the “**Create Invoice**” button when viewing PO details.
- “**Create Invoice**” form will appear and the system will ask to choose a Remit-to address. When attempting to create an invoice for the first time, you will be requested to navigate to “**E-invoicing set-up**” to set up a Remit-to address.


View <span>All</span> <span>Search</span>							
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
N02461000080760	05/28/18	Issued	None	10 Each of Travel magazines	No	90.00 EUR	
N02461000080759	05/28/18	Issued	None	2 Each of travel equipment	No	1,000.00 EUR	

### Choose Invoice From Address

Street  
City, PC1234  
United States  
United States (123456789)

 Choose  
Most Recently Used

Street  
City, PC1234  
Canada  
Canada (123456789RT0001)

 Choose

Totals & Taxes

If there is only one Remit-To address, the system sets it as a default one and will not ask you for it every time.


## Receive & view orders – create invoice

- All fields marked with a red asterisk have to be filled.
- You can add attachments (e.g. an excel file) or scan of an invoice. If necessary, please attach a scan in the “image scan” section in PDF.

### Create Invoice Create

#### General Info

\* Invoice #

\* Invoice Date  

Payment Term 45D


\* Currency

Delivery Number

Status Draft

Image Scan  No file chosen


Supplier Note


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


#### From

\* Supplier CSPTS-US

Supplier Tax ID

\* Invoice From Address AON Supplier   
Street  
City, PC1234  
United States

\* Remit-To Address AON Supplier   
Street  
City, PC1234  
United States

\* Ship From Address AON Supplier   
Street  
City, PC1234  
United States

- Remit-To Address and Ship From Address have to be chosen by a supplier.
- These addresses can be managed in the “E-invoicing setup” tab in the “Admin” section.

# Receive & view orders – create invoice

- Every PO line stands for different product ordered.
- To invoice a PO partially:
  - Change quantity (for a quantity based PO) or price (for a service based PO).
  - Delete chosen line.
- For taxation you can:
  - Enter a general Tax in “**Tax Description**” at the bottom of the page – it will be applicable to all the lines.
  - Select “**Line Level Taxation**” to choose different tax rate for each line. For some countries line level taxation is required and in such case, a vendor does not see a general tax field.
- For each country there are different rates available. For U.S. the only rate is 0% and then a vendor has to enter the tax rate himself.
- For suppliers from certain regions a word “**Tax Description**” is substituted with “**VAT Rate**”.

**Remember to always click “Calculate” after changing any value on an invoice.** You can delete this invoice, save it as draft or submit it to your client.

Lines

Type	Description	Qty	UOM	Price	Total
1	iPhone 7	6	Each	789.89	4,739.34

☒ Line Level Taxation

PO Line: K00091000038294-1 Contract: Not-Required-73378:Morristown Trucking Syn-General Office Supplies-6860005 Billing Notes:

Tax Description	Tax Rate	Tax Amount	Tax Reference
US: USSLT - 0.0%	0	0.00	
CH: Super Reduced Rate - 2.5%			
CH: VAT Exempt - 0.0%			
CZ: Reduced Rate 1 - 15.0%			
CZ: Reduced Rate 2 - 10.0%			
CZ: Standard Rate - 21.0%			
ES: Reduced 1 - 10.0%			
ES: Reduced 2 - 4.0%			
ES: Standard Rate - 21.0%			
IE: Flat Rate for Farmers - 5.4%			
PL: Reduced 1 - 8.0%			
PL: Reduced 2 - 5.0%			
PL: Standard Rate - 23.0%			
SE: Reduced Rate - 12.0%			
SE: Standard Rate - 25.0%			
SE: Super Reduced Rate - 6.0%			
SE: VAT Exempt - 0.0%			
SG: Standard Rate - 7.0%			
SK: Reduced Rate - 10.0%			
SK: Standard Rate - 20.0%			
US: USSLT - 0.0%			

Price: 56.00 Total: 56.00

77052: SubenLA Stamford-General Office Supplies-6860005 Billing Notes:

Subtotal: 4,795.34

Shipping: 0.000

Tax Description (Shipping): 0.000

Handling: 0.000

Tax Description (Handling): 0.000

Misc: 0.000

Tax Description (Misc): 0.000

Tax Description: US: USSLT - 0.0% 0.000 0.00

Total Tax: 0.00

Total: 4,795.34

Buttons: Delete, Cancel, Save as draft, Calculate, Submit










## Receive & view orders – create credit note

- To create invoice, click a red coin icon in the column on the right.
- “**Create Credit Note**” form will appear and the system will ask to choose a Remit-to address (see: **E-invoicing set-up**), as for “**Create Invoice**”.

### Purchase Orders

#### Instructions From Customer

Please acknowledge the purchase order. All invoices must be submitted to [invoices@aon-test.coupacloud.com](mailto:invoices@aon-test.coupacloud.com). You have the option of creating an electronic invoice through this PO or use electronic submission through the Coupa Supplier Network. If you would like more information on how to electronically submit invoices at Aon, please contact [supplier.enablement@aon.com](mailto:supplier.enablement@aon.com). For timely payments, please put EFT details on your invoice.

View All Search							
PO Number	Order Date ▾	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
NL0101000038298	06/20/17	Issued	None	2 Each of Software license IT consultancy 2 Active Non Qualified of Samsung XY 89	No	1,561.00 EUR	  
NLD011000038297	06/20/17	Issued	None	1 Each of Samsung -Notebook 9 13.3" 5 Each of Samsung S Action Mouse Black 2 Each of Anti virus software	No	2,035.00 EUR	  
NL0521000038296	06/20/17	Issued	None	System installation	No	56.89 EUR	  

## Receive & view orders – create credit note

- All fields marked with a red asterisk have to be filled. The form looks similar to the one for creating an invoice.

### Create Credit Note Create

#### General Info

\* Credit Note #

\* Credit Note Date  

Payment Term 45D

\* Currency

Delivery Number


Status Draft

\* Original Invoice #

\* Original Invoice Date  

Image Scan  No file chosen

Supplier Note

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

#### From

\* Supplier CSPTS-US

Supplier Tax ID

\* Invoice From Address AON Supplier  
Street  
City, PC1234  
United States

\* Remit-To Address AON Supplier  
Street  
City, PC1234  
United States

\* Ship From Address AON Supplier  
Street  
City, PC1234  
United States

#### To

Customer Aon

\* Bill To Address The Aon Centre, The Leadenhall  
Building  
122 Leadenhall Street  
London  
EC3V 4AN  
United Kingdom

Buyer Tax ID

Ship To Address 1463 Upgrade street  
San Mateo, 11111  
United States  
Location Code: POL04X01

Enter a number and date of the original invoice.



## Receive & view orders – create credit note

### Lines

Type	Description	Qty	UOM	Price	Total
1	Software license	-2	Each	45.00	-90.00

PO Line: NL0101000038298-1 Contract: [v] Billing: Not-Required—61294:AGN AGRC-General Office Supplies-6860005-Billable Billing Notes: [ ]

VAT Rate: [v] VAT Amount: 0.00 Tax Reference: [ ]

Add Tag

Type	Description	Price	Total
2	IT consultancy	-123.00	-123.00

PO Line: NL0101000038298-2 Contract: [v] Billing: Not-Required—61296:AGN AFF-General Office Supplies-6860005-Billable Billing Notes: [ ]

VAT Rate: [v] VAT Amount: 0.00 Tax Reference: [ ]

Add Tag

+ Add Line

Subtotal -213.00

Shipping [ ]

VAT Rate (Shipping) [v] 0.000

Handling [ ]

VAT Rate (Handling) [v] 0.000

Misc [ ]

VAT Rate (Misc) [v] 0.000

Total VAT 0.00

Gross Total -213.00

- To enter negative value, add “-” in the “Quantity” field (for a quantity based PO) or “Price” field (for a service based PO).
- It is also possible to modify quantity, value or to delete line, as explained before in “Create Invoice”

**Remember to always click “Calculate” after changing any value on an invoice.**

You can delete this invoice, save it as draft or submit it to your client.

✕ Delete Cancel Save as draft Calculate Submit

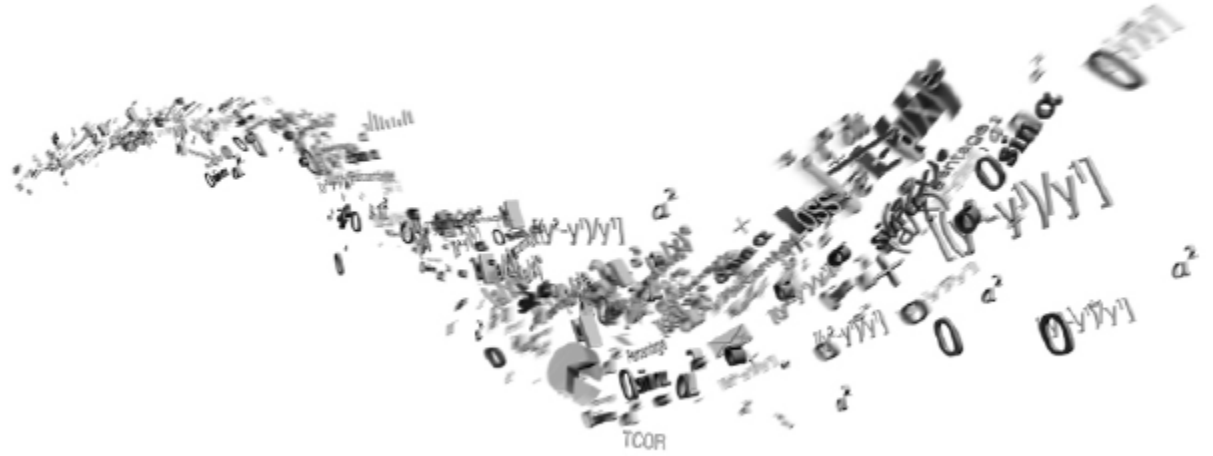
## Receive & view orders – Order Lines

- An “**Order Lines**” tab in the “**Orders**” section allows to you see a list of all lines from the orders received by your company.
- Thanks to this option, a supplier can review which product categories are purchased and create a report for analysis purposes with “**Export To**” option.

The screenshot shows the top navigation bar of the AON system with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. Below this, a sub-bar shows 'Orders' and 'Order Lines', with 'Order Lines' highlighted by a red box. To the right, there is a 'Select Customer' dropdown menu showing 'Aon - DDI BV-NLD' and a 'Configure PO Delivery' button.

### Purchase Order Lines

Export to		View		All		Search	
PO Number (Header)	Line	Order Status (Header)	Item	Total Item	Quantity	Line Total	
NL0101000038298	1	Issued	2 Each of Software license	2		90.00	
NL0101000038298	2	Issued	IT consultancy	None		123.00	
NL0101000038298	3	Issued	2 Active Non Qualified of Samsung XY 89	2		1348.00	
NLD011000038297	2	Issued	5 Each of Samsung S Action Mouse Black	5		225.00	
NLD011000038297	3	Issued	2 Each of Anti virus software	2		248.00	
NLD011000038297	1	Issued	1 Each of Samsung Notebook 9 13.3"	1		1562.00	
NL0521000038296	1	Issued	System installation	None		56.89	



# Invoices

# Invoices

- Click “**Invoices**” in the menu bar - you can review Invoices submitted by you.
- If you have multiple customer accounts linked to CSP you can select different customer invoices view.
- A report can be created by clicking on “**Export to**” button.

 coupa supplier portal

SUPPLIER NAME ▾ | NOTIFICATIONS 4 | HELP ▾

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

Select Customer

Aon

## Invoices

### Instructions From Customer















Please include the Requester's name on the invoice. Please attach invoice image scan if you create an invoice electronically via PO flip or CSN.

Export to ▾

View

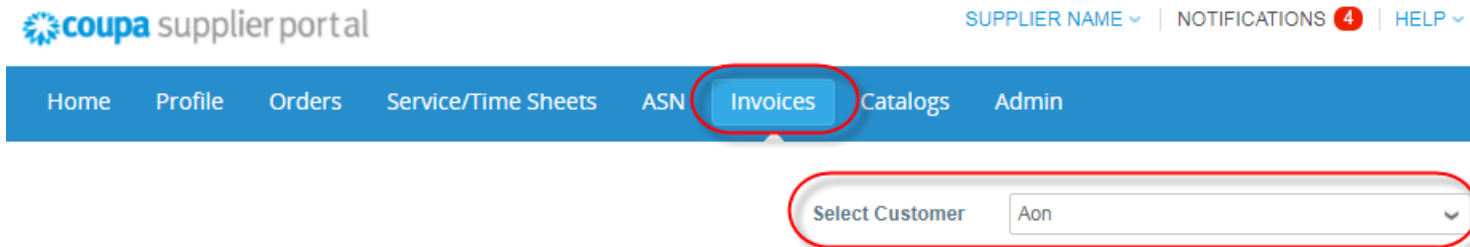
All

Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	05/28/18	Draft	N02461000080760	90.00 EUR	No	 
None	05/28/18	Draft	N02461000080760	90.00 EUR	No	 
None	05/25/18	Draft	N02461000080754	123.00 EUR	No	 
None	05/25/18	Draft	N02461000080754	123.00 EUR	No	 
None	05/25/18	Draft	N02461000080754	123.00 EUR	No	 
None	05/25/18	Draft	N02461000080754	123.00 EUR	No	 
None	05/25/18	Draft	N02461000080754	123.00 EUR	No	 
25.05.18	05/25/18	Pending Approval	N02461000080754	120.15 EUR	No	

# Invoices

- You can select different view of invoices or create your own and can see payment status of your invoices.
- If you want to see invoices for particular status then you can export file.
- Under View tab, you can view Payment Information, Paid invoices etc.



## Invoices

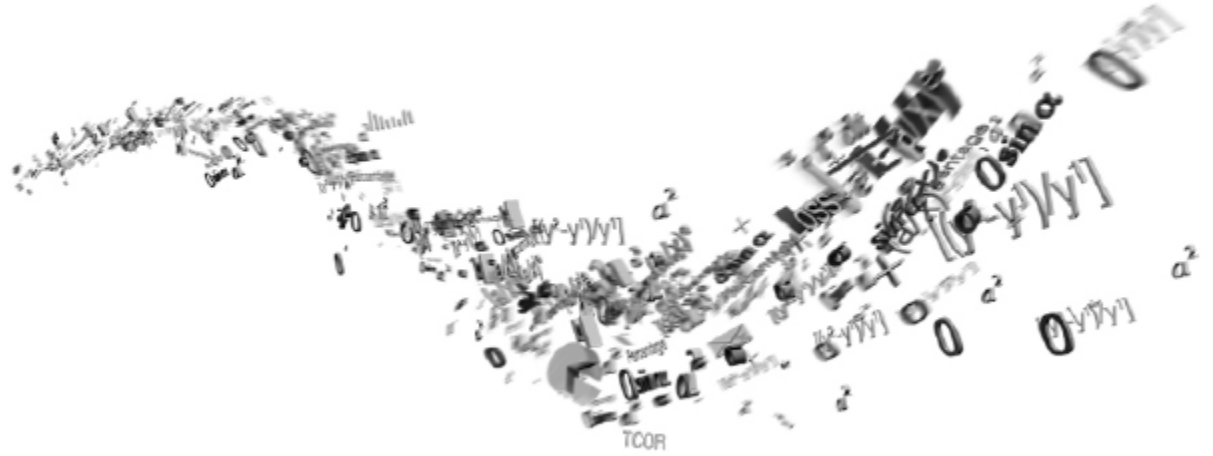
**Instructions From Customer**  
Please include the Requester's name on the invoice. Please attach invoice image scan if you create an invoice electronically via PO flip or CSN.

Invoice #	Created Date	Status	PO #	View	Comments	Actions
111	04/20/17	Pending Approval	HO0901000034092	All		
None	04/20/17	Draft	HO0901000034092			
20170183	02/13/17	Approved	NL0011000032507			
20170179	02/13/17	Approved	NL0011000032508			
None	02/13/17	Draft	NL0011000032510			
20170178	02/13/17	Approved	NL0011000032509			
20170173	02/13/17	Approved	NL0011000032512			
20170172	02/13/17	Approved	NL0011000032510			

## Invoices

A supplier can view the following invoice statuses in the CSP:


- **Draft** – Draft invoice that has not yet been submitted.
- **Processing** – Invoice that is between invoice being submitted by the Supplier and the submission being recorded in Aon's instance.
- **Pending Approval** – Invoice undergoing any Aon-internal process to allow final approval. This could be pending receipt or pending approval.
- **Disputed** – Invoice that is currently being disputed by the business or AP.
- **Approved** – Invoice that is approved and ready for payment as per the pay terms or immediately if overdue.
- **Voided** - Invoice voided after being fully approved and processed.



# Catalogs

# Catalogs

- Click “**Catalogs**” in the menu bar - The catalogs page is where you work with catalogs for your customers such as Aon.
- Within Coupa, a catalog is a collection of items. You can create as many catalog records as you like, but each catalog has to be approved by Aon before it can be included in Coupa search results.

 **coupa** supplier portal





CC: v | NOTIFICATIONS 11 | HELP v

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

Select Customer Aon - BV-NLD

Configure punch out

## Catalogs

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions
 BV-NLD Catalog 3	05/02/17	05/02/17	None	None	Pending Approval	No	
 Information TEST	04/26/17	None	None	None	Accepted by Customer	No	
 Information TEST	04/20/17	None	None	None	Accepted by Customer	No	

Per page 15 | 45 | 90



## Catalogs

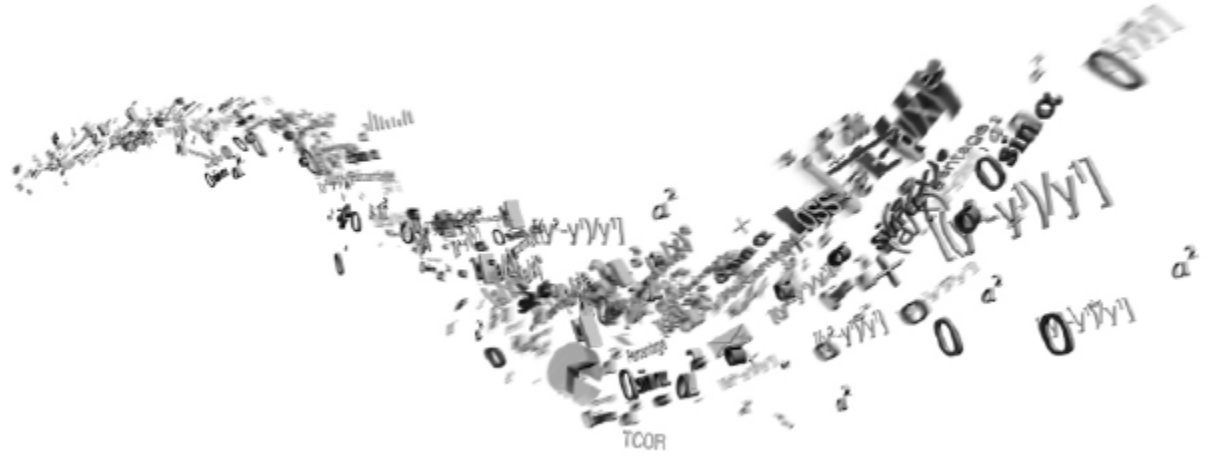
- If you are interested, please follow the below attached detailed instruction for Catalogues.



Microsoft  
PowerPoint Presentation

You can also **Configure Punch-out** – a punch-out is a form of integration between a supplier's website and Coupa.

If you are interested in this option please contact [gsmhelpdesk@aon.com](mailto:gsmhelpdesk@aon.com)



# Admin

# Admin

- Click “**Admin**” in the menu bar – you can edit your user information, Invite users to your CSP, Add Remit-To address, merge requests, can setup E-Invoicing etc.

**coupa** supplier portal

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

Admin Users Invite User

Users	Permissions	Customer Access
Information <a href="#">information@yahoo.com</a> <span>Edit</span>	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon Aon Aon
DDI Storage DDI Storage <a href="#">fistorage@yahoo.com</a> <span>Edit</span>	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon

**Users**

- Merge Requests
- E-Invoicing Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Coupa Accelerate
- Preferences

## Admin

- If you want to invite another users then click on “**Invite User**”. Fill “**Email**” tab and select the permissions and customers and then click “**Send Invitation**”.

### Invite User

×

First Name

Last Name

\* Email

Permissions

☒ All

☒ Admin

☒ Orders

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

Customers

☒ All

☒ Aon

☒ Aon

Cancel

Send Invitation

## Admin

- If you want to merge your Aon CSP account with another company CSP account then enter the email address and click “**Request Merge**”.

The screenshot displays the Aon Admin interface. At the top is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. Below this, the page title is 'Admin Merge Requests'. On the left is a sidebar menu with options: Users, Merge Requests (highlighted with a red box), E-Invoicing Setup, Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate, and Preferences. The main content area has a section titled 'Initiate Merge Request' containing a text input field with the email 'coupa@coupamail.edu' and a blue 'Request Merge' button (also highlighted with a red box). Below this is a section titled 'Open merge requests' which states 'All clear! No open merge requests.'

## CSP – how to merge accounts

- To request a merge, type in the e-mail address of a person whose mailbox is linked to other Coupa profile.
- Click “**Request Merge**”.

Company Account Merge ×

---

SUPPLIER US of **BUSINESS SERVICE US INC-SHARE** has requested to merge with your Coupa Supplier Portal account.

If you accept this request the **administrator of BUSINESS SERVICE US INC-SHARE** will become the account owner for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account:

- Supplier Canada ( [ca@aol.com](#) )

Note From Requester: Please accept this merge request.

Provide note for the Requester

☒ I recognize the email address above as a coworker at my company, and I agree to merge

Cancel Reject **Accept**

- Here you have to choose who will be the owner of the merged account – you or the person you are inviting.
- Add a note for an invited person.

## CSP – how to merge accounts

- The person, you sent a request to, will receive an e-mail from Coupa and notifications the CSP account.
- Also, information about a new merge request, will be visible on the main page in the **“Merge Accounts”** section and in the **“Merge Requests”** tab in **“Admin”**.

### 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](#).

**BUSINESS SERVICE US INC-SHARE** is requesting to merge with you

PO BOX 7  
PHILADELPHIA, PA 19104  
United States

[us.profile@yahoo.com](#)

Accept Merge

### Initiate Merge Request

Request Merge

### Open merge requests

05/01/17

**BUSINESS SERVICE US INC-SHARE**

PO BOX 7  
PHILADELPHIA, PA 19104  
United States

Respond

By clicking on **“Respond”** on **“Accept Merge”** button, a further action can be taken.

## CSP – how to merge accounts

- Here the system informs about the consequences of accepting a merge requests – who the account owner will be.

Company Account Merge ×

---

SUPPLIER US of **BUSINESS SERVICE US INC-SHARE** has requested to merge with your Coupa Supplier Portal account.

If you accept this request **the administrator of BUSINESS SERVICE US INC-SHARE will become the account owner** for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account:

- Supplier Canada ( [.ca@aol.com](#) )

Note From Requester: Please accept this merge request.

Provide note for the Requester

☒ I recognize the email address above as a coworker at my company, and I agree to merge

Cancel Reject Accept

- A request can be either accepted, cancelled or rejected.
- To accept it, a checkbox above has to be marked.



## CSP – how to merge accounts

- After the merge, any linked customers will be converted to the new account.
- Users from both main and merged account are visible in the “**Users**” tab in the “**Admin**” section.
- In the main menu sections, there is a “**Select Customer**” option. You can choose which company’s profile you want to work on e.g. create an invoice, view orders or change profile

### Admin Users

[Users](#)  
[Merge Requests](#)  
[E-Invoicing Setup](#)  
[Fiscal Representatives](#)  
[Remit-To](#)  
[Terms of Use](#)  
[Coupa Accelerate Preferences](#)

Invite User

Users	Permissions	Customer Access
Supplier US inge.us@yahoo.com <a href="#">Edit</a>	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon Aon
Supplier Canada inge.ca@aol.com <a href="#">Edit</a>	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Aon

 coupa supplier portal

SUPPLIER NAME ▾ | NOTIFICATIONS 4 | HELP ▾

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

Select Customer

Aon ▾

## CSP – how to merge accounts

- The “Merge Accounts” section is also available in the main page when an user logs into the


The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal' text, followed by a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. The main content area is divided into two columns. The left column shows the user's profile for 'BV-NLD', including a globe icon, a list of details (About, Industry, Website, Established, Employees) with corresponding values, and an 'Improve Your Profile' button. The right column, highlighted with a red box, contains the 'Merge Accounts' section. This section includes a text block explaining the purpose of merging accounts, a link for more information, and a list of accounts for merging, specifically 'SUPPLIER BUSINESS SERVICE US INC-SHARE' with its address and email. Below the list are 'Request Merge' and 'Remove' buttons. At the bottom right, there is a 'Latest Customers' section listing 'Aon' three times.

**coupa** supplier portal

SUPPLIER NAME ▾ | NOTIFICATIONS 11 | HELP ▾


Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

BV-NLD



About DDi software driving all your...  
Industry Other information technology and...  
Website <https://www.ddi.nl/>  
Established 1988  
Employees 100-499

[Improve Your Profile](#)



About

Ben je klaar met onvolledige dossiers? Heb je genoeg van facturen die te lang blijven liggen? Suist het je, omdat je steeds meer aanvragen ontvangt en je mensen het werk niet meer aankunnen? Schrik je van het geld wat je uitgeeft aan printen en portokosten? Wil je domweg tijd besparen op je administratieve processen en de kwaliteit ervan verhogen?

Public Profile

<https://supplier-test.coupahost.com/suppliers/public/10268>

**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.](#)

**SUPPLIER BUSINESS SERVICE US INC-SHARE**

PO BOX 7  
PHILADELPHIA, PA 1  
United States  
[nge.us@yahoo.com](mailto:nge.us@yahoo.com), [nge.ca@aol.com](mailto:nge.ca@aol.com)

[Request Merge](#) [Remove](#)

**Latest Customers**

[Aon](#)  
[Aon](#)  
[Aon](#)

## Admin

- Once you log into Coupa Supplier Portal, suppliers can start setting up their account for invoicing in our new setup area that will guide them through the process.
- To setup a legal entity in order to create an Invoice, click “**Add Legal Entity**”. Follow the commands on the screen that will guide you to add a legal entity and information about your business.

Admin E-Invoicing Setup Add Legal Entity

Users

Merge Requests

**E-Invoicing Setup**

Fiscal Representatives

Remit-To

Terms of Use

Coupa Accelerate Preferences

### Legal Entity

SUPPLIER NAME	Actions
<div>BINNEN HOOFFDOR 2 CT Netherlands</div> <div>Tax ID NL99999999</div>	
<b>Remit-To Address</b>	
<div>BINNEN HOOFFDOR 2 CT Netherlands</div>	
<b>Ship From Address</b>	
<div>BINNEN HOOFFDOR 2 CT Netherlands</div>	

# Admin

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country United States

- ☒ Use this address for Remit-To 
- ☒ Use this for Ship From address 

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

What is your Tax ID? 

Country

Tax ID

☐ I would like to use this as a local tax number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

[Show fewer fields](#)

Banking Information 

Bank Name

Beneficiary Name

Account Number

Routing Number (ABA)

IBAN

Sort Code

SWIFT Code

Assign Customers

Who do you want to see this?

- ☒ All
- ☒ Aon
- ☒ Aon

Where's your business located?

\* 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

Fill the red asterix fields (e.g. Legal Entity Name, Country, Co registered number, VAT ID etc.) and click on Continue.

The address which is being created will be by default used as Remit-to and Ship From address. If you uncheck these boxes, after choosing “**Continue**”, there will be an option to add other Remit-to and Ship From address.

Once all the fields are updated then click on “**Save & Continue**”.

## Admin

- If you unchecked box “**Use this for Remit-to**” at the earlier stage, you will see this view.
- If you want to modify or to add another Remit-To address then click on Add Remit-To and fill

×

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	Banking Information	Status	
Octva Street Netherland 29 Netherlands	None	Active	Manage

Deactivate Legal Entity

Cancel

Next

## Admin

- If you unchecked box “**Use this for Ship From address**” at the earlier stage, you will see this view.
- If you want to modify or to add another Ship from address then click on Add Ship From and fill all

Where do you ship goods from?

1 2 3 4

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

Add Ship From

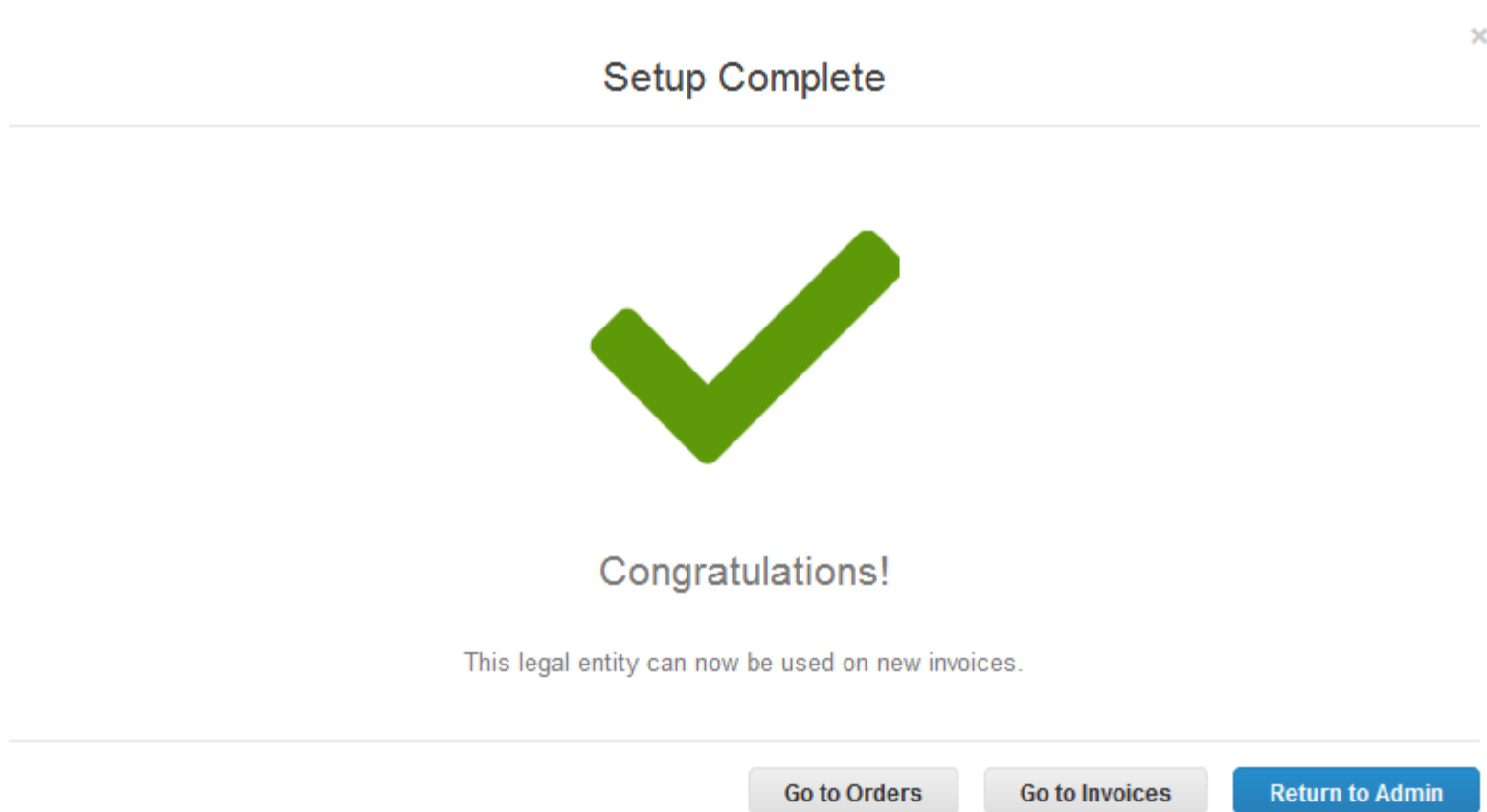
Title	Status	
Octva Street Netherland 29 Netherlands	Active	Manage

Deactivate Legal Entity

Done

## Admin

- You will receive below message which shows Legal entity can be used on new invoices.



# Admin

- Remit To – You can view your remit to address. In case you want to make changes in your remit to address then click on E-Invoicing Setup.

## Admin Remit-To

To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

Remit-To Address	Banking Information	Customers
<div>Remit-To Location</div> <div>Address: Kalverst 212 Amsterdam Netherlands 10 PD Preferred Language: Dutch (Netherlands)</div> <div>View Details</div>		None
<div>Remit-To Location</div> <div>Remit-To Code: 1234677</div> <div>Address: A876 street square Netherland Netherlands 122233344</div> <div>View Details</div>		Aon Aon
<div>Remit-To Location</div> <div>Address: A234 street 23  Amsterdam Netherlands 12223445</div> <div>View Details</div>		Aon Aon





## Account Settings & Notification Preferences

- You can access “**Account settings**” by clicking on your account login in the upper right corner of the screen.
- Here you can change your account settings.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a header with the Coupa logo and 'supplier portal' text. To the right of the header, there are links for 'Supplier Name', 'NOTIFICATIONS 11', and 'HELP'. Below the header is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. A dropdown menu is open from the 'Admin' link, showing 'Account Settings', 'Notification Preferences', and 'Log Out'. The 'Account Settings' page is titled 'My Account Password'. On the left, there's a sidebar with links: Settings (highlighted), Notification Preferences, Security & Two-Factor Authentication, and Authentication. The main content area contains a form with the following fields: 'First Name' (containing 'Supplier Name'), 'Last Name' (containing 'Information'), 'Email' (containing 'emailaddress@yahoo.com'), 'Current Password' (masked with dots), 'Password' (empty), and 'Password Confirmation' (empty). Below the password fields is a reCAPTCHA widget with the text 'I'm not a robot' and a 'Save' button at the bottom right.

**coupa** supplier portal

Supplier Name | NOTIFICATIONS 11 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

Account Settings  
Notification Preferences  
Log Out

### My Account Password

**Settings**  
Notification Preferences  
Security & Two-Factor Authentication

\* First Name Supplier Name

\* Last Name Information

\* Email emailaddress@yahoo.com

\* Current Password

Password

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

Password Confirmation

☐ I'm not a robot

reCAPTCHA  
Privacy Terms

Save

# Account Settings & Notification Preferences

- In “**Notification Preferences**” section it is possible to manage your notifications.
- If you want to be notified about a particular thing, just check a way you would like to receive messages.
- Notifications are turned off by default.

## My Account Notification Preferences

You will start receiving notifications when your customers enable them.

### 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

### Form Responses

A form response is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A form response is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Supplier information is updated	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

## Account Settings & Notification Preferences

- To receive SMS Notifications, validate your phone number in this section.
- Enabling Two-Factor Authentication, will allow you to use another form of identification to access your account and improve security (For more information visit [Coupa site](#)).

**My Account** Security & Two-Factor Authentication

Settings


Notification Preferences

**Security & Two-Factor Authentication**

---

### Mobile Phone Verification

**Mobile Phone : Not verified**

 +1 2345-678-9101

This phone will receive: [SMS Notifications](#)

**Validate**

---

### Two-Factor Authentication

**Status : Disabled**

**Enable**

**Thank you!**