



# COUPA SUPPLIER PORTAL

PO Backed Invoice Supplier Guide

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# Coupa Supplier Portal (CSP)

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## Registering for CSP

Registering for the Coupa supplier portal provides an easy way to manage information, view purchase orders, and create and manage invoices and online catalogs. You will receive an email notification with an invitation to connect to the Coupa Supplier Portal, similar to the example below.



Ace Corporation would like to be connected with you as a trading partner on Coupa Supplier Network. You will be able to manage your company information and collaborate more efficiently when we're connected.

Coupa Support  
Ace Corporation


To confirm this request, please click the link below:


<https://supplier-demo.coupahost.com/signup/cba19cd2811fbee4d8b148fb2828dc8ed7091fb8>






- 
1. Click the link provided in the email to register. From the registration site, you can also request an invitation.
  2. Once you have registered, log in using your credentials.

## Supplier Portal Home Page

After logging in, you will see the supplier portal home page. The CSP home page provides a snapshot of your company's info. Companies searching for potential suppliers on the CSP will see only public profiles.


**Marketing Masters**



 About
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  Employees


[Improve Your Profile](#)

**About**



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Public Profile





<https://csn-3-1-0.coupadev.com/suppliers/public/22>


**Merge Accounts**

It looks like your company has more than one CSN account. Consider merging them so buyers can identify your company with confidence.

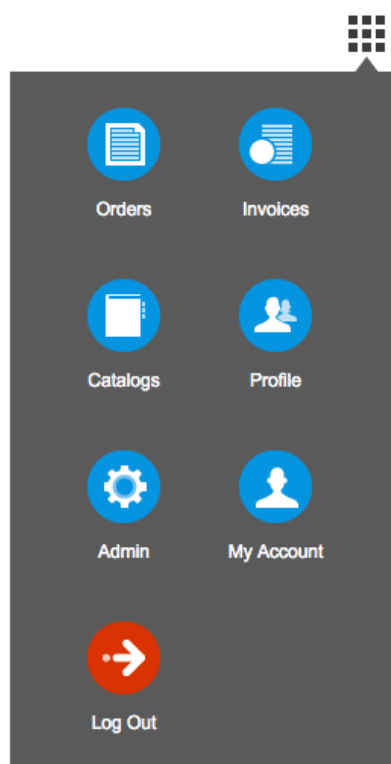

**Latest Customers**

Coupa

| Item  | Description   |
|---|---|
| Default Public Profile  | Displays your company's public profile information.                                   |
| Merge Accounts  | Allows you to consolidate accounts if you have more than one on the supplier portal.  |
| Latest Customers  | Displays a list of your current customers.  |
|  | The Menu button allows you to navigate within the CSP.                                |
|  | Use the Notification button to set up notification preferences.                       |
|  | When you have a new alert Notifications display in red with the number of new alerts. |
|  | The Help button displays the online help and help tour.                               |

## Menu

The Menu button helps you navigate through the system. From the Menu, you can create invoices, update your company's profile, and invite additional users to join the CSP.



| Item              | Description   |
|-------------------|---|
| <b>Orders</b>     | This is where you can find purchase orders sent by your customers.  |
| <b>Invoices</b>   | This is where you create and manage invoices to send to your customers.   |
| <b>Catalogs</b>   | This is where you create and manage customer-specific catalogs  |
| <b>Profile</b>    | This is where you create, modify, and manage your public and customer-specific profiles, and manage which remit-to addresses each customer can use. |
| <b>Admin</b>      | This is where you can manage users, merge requests, and your remit-to addresses   |
| <b>My Account</b> | This is where you can manage your person profile.   |
| <b>Log Out.</b>   | Use this to log out of the CSN.   |

## Notifications

You can view new notifications and make changes to your notifications preferences. Click **Notifications > gear icon** to access the Notifications Preferences page. Here, you can see the types of notifications you can select from, and how you want to view them, via email or the CSP. If neither is selected, notifications for that item will not be sent.



### Notification Preferences

#### Catalogs

|                         |  |   |
|-------------------------|--|---|
| Catalog Rejected        | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            |
| Catalog About to Expire | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            |
| New Catalog Comment     | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| Catalog Approved        | <input type="checkbox"/> Online            | <input type="checkbox"/> Email            |

#### Easy Form Response

|                              |  |   |
|------------------------------|--|---|
| Form Response Approved       | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| Form Response Rejected       | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| Supplier Information Updated | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |

#### Invoices

|                     |  |   |
|---------------------|--|---|
| Invoice Paid        | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| Invoice Approved    | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| New Invoice Comment | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
| Invoice Rejected    | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |

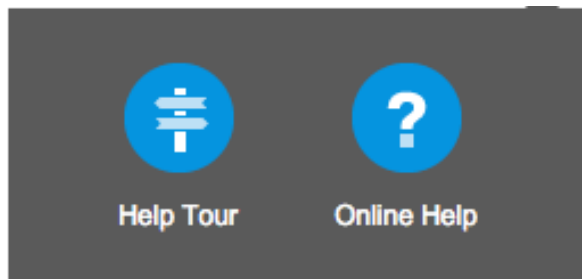
#### POs

|                |  |   |
|----------------|--|---|
| New PO Comment | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email |
|----------------|--|---|

*If you choose not to receive online notifications, you can go to **Notifications > See all** to view them in your My Notifications page.*

## CSP Help and Support

For additional information while using the CSP, click **Help > Online Help**. Here, you will find helpful topics and definitions for using the supplier portal. You can also click. **Help > Help Tour** to see a quick navigation demo of the supplier portal.



If you require technical assistance, please send an email to [supplier@coupa.com](mailto:supplier@coupa.com).

## Updating Your Company Profile

Using CSP you can easily update your company's profile.

1. From the Menu, click **Profile**.
2. Select the profile you wish to edit from the **Profile** drop down menu.
3. Click **Edit Profile**. Make any desired changes to your profile.
4. Click **Save** when you have finished making changes.

*Fields marked with an asterisk (\*) are required fields.*

## Inviting Additional Users

Using the supplier portal, you can invite additional users in your company access to the CSP.

1. From the Menu, click **Admin**.
2. Click **Invite User**.

×

Invite User

First Name

Last Name

\* Email

Permissions

Customers

☒ All
 ☒ Admin
 ☒ Orders
 ☒ Invoices
 ☒ Catalogs
 ☒ Profiles

☒ All
 ☒ Coupa

Cancel

Send Invitation

- Enter the user's information.
- Select which permissions the user should be able to access.
- Select which customer(s) the user should be able to access.
- Click **Send Invitation**. The employee will receive an email notification, with a link to register.

To deactivate a user, you must edit the user record and select **Deactivate User**.

## Adding a Remit To Address

CSP includes remit-to addresses as part of electronic invoice compliance. You must add a remit to address before you can create an invoice.

- From the Menu, click **Admin**.

[cym.sanguinet+js@coupa.com](#)

Admin

Users

Merge Requests

Remit To

Add Remit To

| Remit-To Address  | Customers |
|---|-----------|
| <div>Remit To Location</div> <div>ACME Corp</div> <div>R002</div> <div>4321 Main Street</div> <div>San Mateo CA</div> <div>United States</div> <div>94402</div> <div>Preferred Language: US English</div> <div>Manage</div> |           |

Coupa

 Coupa |



2. Click **Remit To** link.
3. Click **Add Remit To**.

### Create Remit To Address ✕

Remit To Name

Remit To Code

Address \*

Remit To Contact

Assign Customers

You are about to create a remit to address to use for invoicing, however it won't be sent to your customer until you include it on an invoice.

Cancel
Add

4. Once you have filled out the remit to address fields, click **Add**.

## Address (information required)

| Item                     | Description   |
|--------------------------|---|
| <b>Remit To Name</b>     | A unique easily identifiable user-friendly name.  |
| <b>Remit To Code</b>     | Use this field to tie your CSP remit-to address with the corresponding address in your ERP. |
| <b>Address Line 1, 2</b> | Standard address information.   |
| <b>City</b>              | Name of the city.   |
| <b>State</b>             | Name of the state.  |
| <b>Postal Code</b>       | Five digit postal code.   |
| <b>Country</b>           | Country of origin.  |
| <b>Tax Country</b>       | Determines the origination country for tax purposes.  |

## Remit To Contact

This is optional contact information for the remit-to address.

## Assign Customers

Here, you can choose which customers will be able to see a specific remit-to address.

*If you merge accounts, your remit-to addresses won't be merged unless you make them available for All customers. Once the merge is complete, you can again assign the remit-to address to the specific customers you want.*

## Purchase Orders





The purchase orders page is where you work with orders from your customers. The Purchase Orders table lists all the POs you've received from that customer. You can use the search bar to filter the list with a search term, or click the View dropdown to perform advanced filtering. See [Custom Views](#) for more info about advanced filtering.

1. From the Menu, click **Orders**.
2. Click **Orders**. The Purchase Order screen displays all your purchase orders. The first time you use the orders page, you'll have to choose a customer. To see orders from a specific customer, select the customer from the dropdown list just under the menu button. The next time you visit the orders page, it'll return to the last customer you chose.

Select Customer Ace Corporation  
✓ Coupa

### Purchase Orders

View All 🔍

| PO Number            | Order Date | Status | Acknowledged | Items  | Unanswered Comments | Total      | Actions   |
|----------------------|------------|--------|--------------|--|---------------------|------------|---|
| <a href="#">2759</a> | 09/17/15   | Issued | None         | 1 Each of Snow removal three parking lots 12/8 | No                  | 500.00 USD |   |
| <a href="#">2758</a> | 09/17/15   | Issued | None         | 1 Each of Snow removal on 1/7                  | No                  | 250.00 USD |   |

3. To view the detail for an individual PO, click the PO number.

| Column            | Description  |
|-------------------|--|
| <b>PO Number</b>  | This is the purchase order number generated by Coupa.  |
| <b>Order Date</b> | This is the date the purchase order was created on.  |
| <b>Status</b>     | This is the current status of the purchase order. See the Status table for more information. |

| Column                     | Description   |
|----------------------------|---|
| <b>Acknowledged</b>        | <p>You can choose to let your customer know that you received their PO by selecting the Acknowledged checkbox on the purchase order. When you select the checkbox, the current date appears in the Acknowledge column.</p> <p>This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date will appear.</p> |
| <b>Items</b>               | Items List of items on the PO.  |
| <b>Unanswered Comments</b> | You can now make comments directly on the purchase order for your customers to see. If your customer has left comments that you haven't responded to, you'll get notified here.   |
| <b>Total</b>               | This is the total amount of the purchase order.   |
| <b>Actions</b>             | Use the gold coins icon 🏆 to flip the PO into an invoice and the red coins icon 🏴 to create a credit note.  |

| Status                      | Description   |
|-----------------------------|---|
| <b>Buyer Hold</b>           | The PO is approved but pending buyer review.  |
| <b>Cancelled</b>            | The order has been cancelled, and doesn't need to be fulfilled.                                     |
| <b>Closed</b>               | The issued PO has been received and was then closed, either manually or automatically within Coupa. |
| <b>Currency Hold</b>        | The PO is on hold due to a currency exchange rate issue.  |
| <b>Error</b>                | There's something wrong with the PO. Contact your customer to get the PO back on track.             |
| <b>Issued</b>               | The PO has been approved and sent to the supplier.  |
| <b>Supplier Window Hold</b> | The PO was approved outside of the order window schedule under contract terms.                      |

*If you click on the purchase order number to view the PO, and then use the back button to return to the Purchase Orders page, you'll need to refresh the page to see any changes you made to the PO.*

## Creating an Invoice

You can create an invoice directly from the purchase order.

1. From **Purchase Orders**, click the gold coin (👉) icon in the Action's column of the PO you wish you create an invoice from.
2. Fill out any required fields marked with an asterisk (\*).
3. Use the **Calculate** button to see invoice totals prior to submitting.
4. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.

### Create Invoice Create



|   |   |
|---|---|
| <p><b>*Invoice #</b> <input type="text"/></p> <p><b>*Invoice Date</b> <input type="text" value="01/14/16"/></p> <p><b>Payment Terms</b> Net 30</p> <p><b>Date of Supply</b> <input type="text" value="01/14/16"/></p> <p><b>*Currency</b> <input type="text" value="USD"/></p> <p><b>Delivery Number</b> <input type="text"/></p> <p><b>Status</b> Draft</p> <p><b>Image Scan</b> <input type="button" value="Choose File"/> No file chosen</p> <p><b>Supplier Notes</b> <input type="text"/></p> <p><b>Attachments</b> <a href="#">Add File</a>   <a href="#">URL</a>   <a href="#">Text</a></p> | <p><b>*Supplier</b> Smith Snow Removal</p> <p><b>*Remit To Address</b> Smith Snow Removal<br/>555 Grant<br/>Chicago, IL 60462<br/>United States<br/>United States (US)</p> <p><b>Customer</b> Coupa</p> <p><b>Bill To Address</b> 28 Nevada Blvd<br/>Laughlin, NV 94301<br/>United States</p> <p><b>Ship To Address</b> 28 Nevada Blvd<br/>Laughlin, NV 89028<br/>United States<br/>Location Code: TEST</p> |
|---|---|

| Type | *Description        | Qty | UOM  | *Price | Total  |
|------|---------------------|-----|------|--------|--------|
|      | Snow removal on 1/7 | 1   | Each | 250.00 | 250.00 |

PO Line Contract Billing

[2758-1](#)  SF-Marketing-Assets

[Add Line](#)

|              |   |
|--------------|---|
| Subtotal     | 250.00  |
| Shipping     | <input type="text" value="0.000"/>                              |
| Handling     | <input type="text" value="0.000"/>                              |
| Misc         | <input type="text" value="0.000"/>                              |
| Tax Code     | <input type="text" value="0"/> % <input type="text" value="0"/> |
| Total Tax    | 0.00  |
| <b>Total</b> | <b>250.00</b>   |

| Item                   | Description   |
|------------------------|---|
| <b>Invoice #</b>       | <p>This is a required field. You will need to enter your invoice number.</p> <p><i>Invoice numbers cannot exceed 16 characters.</i></p>   |
| <b>Invoice Date</b>    | The invoice date will default to the date the invoice is created.   |
| <b>Payment Terms</b>   | This field displays the code for your current payment terms that were agreed upon between your company and the supplier.  |
| <b>Currency</b>        | Displays the currency options for the invoice.  |
| <b>Delivery Number</b> | The delivery number, if available.  |
| <b>Status</b>          | The status of your invoice.   |
| <b>Image Scan</b>      | Allows you to upload an image to be attach to the invoice.  |
| <b>Supplier Notes</b>  | Use this field to enter a message for the invoice approver.   |
| <b>Attachments</b>     | <p>Allows you to add various attachments to the invoice.</p> <ul style="list-style-type: none"> <li>• File – This option allows you to upload a document to the invoice. Use the Browse button to upload the file from your desktop.</li> <li>• URL – Use this option to include an external URL.</li> <li>• Text – Use this option to include additional text content.</li> </ul> <p><i>Ensure your document is a standard attachment file, not an image. Types of files that can be uploaded: .doc, .docx, .gif, .jpg, .jpeg, .pdf, .png, .tiff, .tif, .xls, .xlsx, .zip, and .txt.</i></p> |

| Item                       | Description  |
|----------------------------|--|
| <b>Supplier</b>            | Auto-populates from the PO with the supplier's name.                     |
| <b>Remit To</b>            | Auto-populates from the PO with the supplier's remit to address.         |
| <b>Customer</b>            | Auto-populates from the PO with the customer name.                       |
| <b>Bill To Address</b>     | Auto-populates from the PO with the bill to address.                     |
| <b>Ship To Address</b>     | Auto-populates from the PO with the ship to address.                     |
| <b>Line Level Taxation</b> | Allows you to tax line items at different rates if enabled.              |
| <b>Type</b>                | Displays the line items type.  |
| <b>Description</b>         | Provides a description of the good(s) and/or service(s) purchased.       |
| <b>Qty</b>                 | Shows the number of items.   |
| <b>UOM</b>                 | Shows the unit of measure.   |
| <b>Price</b>               | Displays the unit price.   |
| <b>Total</b>               | Displays the item total.   |
| <b>PO Line</b>             | Provides the PO line number associated with the invoice.                 |
| <b>Contract</b>            | Displays contract information, if any.                                   |
| <b>Billing</b>             | Displays the billing department associated with the PO.                  |
| <b>Subtotal</b>            | Displays the total price of only the items                               |
| <b>Shipping</b>            | Displays any shipping costs.   |
| <b>Handling</b>            | Displays any handling costs.   |
| <b>Misc</b>                | Displays any additional miscellaneous costs.                             |
| <b>Tax Code</b>            | Provides an editable tax code for the supplier to select when invoicing. |

| Item             | Description                    |
|------------------|--------------------------------|
| <b>Total Tax</b> | Displays the total tax amount. |
| <b>Total</b>     | Displays the invoice total.    |

| Status            | Description   |
|-------------------|---|
| <b>Approved</b>   | The invoice has been accepted for payment by the customer.                              |
| <b>Draft</b>      | The invoice has been created, but hasn't been submitted to your customer yet.           |
| <b>Pending</b>    | The invoice is currently with a business approver.                                      |
| <b>Processing</b> | The invoice is being processed by the AP department, and should be paid soon.           |
| <b>Voided</b>     | There's something wrong with the PO. Contact your customer to get the PO back on track. |

## Creating a Credit Note

If you need to create a credit note, it's best practice to specify a negative quantity for the item to be credited, rather than negative price. This is especially true if you're using 3-way matching, since before the credit can be processed, it will need to be matched against a receipt.

1. From **Purchase Orders**, click the red coin (🪙) icon in the Action's column of the PO you wish you create a credit note from.
2. Fill out any required fields marked with an asterisk (\*).
3. Use the **Calculate** button to see credit note totals prior to submitting.
4. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.

Create Credit Note Create

|                        |   |                   |                     |
|------------------------|---|-------------------|---------------------|
| *Credit Note #         | <input type="text"/>  | *Supplier         | Smith Snow Removal  |
| *Credit Note Date      | 01/14/16  | *Remit To Address | Smith Snow Removal  |
| Payment Terms          | Net 30  |                   | 555 Grant           |
| Date of Supply         | 01/14/16  |                   | Chicago, IL 60462   |
| *Currency              | USD   |                   | United States       |
| Delivery Number        | <input type="text"/>  |                   | United States (US)  |
| Status                 | Draft   | Customer          | Coupa               |
| *Original Invoice #    | <input type="text"/>  | Bill To Address   | 28 Nevada Blvd      |
| *Original Invoice Date | <input type="text"/>  |                   | Laughlin, NV 94301  |
| Image Scan             | <input type="text"/> Choose File No file chosen                       |                   | United States       |
| Supplier Notes         | <div><div></div></div>  |                   |                     |
| Attachments            | Add <a href="#">File</a>   <a href="#">URL</a>   <a href="#">Text</a> |                   |                     |
|                        |   | Ship To Address   | 28 Nevada Blvd      |
|                        |   |                   | Laughlin, NV 89028  |
|                        |   |                   | United States       |
|                        |   |                   | Location Code: TEST |

| Type | Description                | Qty | UOM  | *Price | Total |
|------|----------------------------|-----|------|--------|-------|
|      | Snow removal three parking | 0   | Each | 500.00 | 0.00  |

PO Line Contract Billing  
[2759-1](#) SF-Marketing-Assets

Add Line

|          |       |
|----------|-------|
| Subtotal | 0.00  |
| Shipping | 0.000 |
| Handling | 0.000 |
| Misc     | 0.000 |
| Tax Code | 0 % 0 |

| Item             | Description  |
|------------------|--|
| Credit Note #    | This is a required field. You will need to enter your credit note number. <div> <i>Invoice numbers cannot exceed 16 characters.</i> </div> |
| Credit Note Date | The credit note date will default to the date the it is created.   |
| Payment Terms    | This field displays the code for your current payment terms that were agreed upon between your company and the supplier.                   |
| Currency         | Displays the currency options for the invoice.   |



| Item                         | Description  |
|------------------------------|--|
| <b>Delivery Number</b>       | The delivery number, if available.   |
| <b>Status</b>                | The status of your invoice.  |
| <b>Original Invoice #</b>    | Provides a field to enter the original invoice #.  |
| <b>Original Invoice Date</b> | Provides a date selector to enter the original invoice date.   |
| <b>Image Scan</b>            | Allows you to upload an image to be attach to the invoice.   |
| <b>Supplier Notes</b>        | Use this field to enter a message for the invoice approver.  |
| <b>Attachments</b>           | <p>Allows you to add various attachments to the invoice.</p> <ul style="list-style-type: none"> <li>• File – This option allows you to upload a document to the invoice. Use the Browse button to upload the file from your desktop.</li> <li>• URL – Use this option to include an external URL.</li> <li>• Text – Use this option to include additional text content.</li> </ul> <div> <p><i>Ensure your document is a standard attachment file, not an image. Types of files that can be uploaded: .doc, .docx, .gif, .jpg, .jpeg, .pdf, .png, .tiff, .tif, .xls, .xlsx, .zip, and .txt.</i></p> </div> |
| <b>Supplier</b>              | Auto-populates from the PO with the supplier's name.   |
| <b>Remit To</b>              | Auto-populates from the PO with the supplier's remit to address.   |
| <b>Customer</b>              | Auto-populates from the PO with the customer name.   |
| <b>Bill To Address</b>       | Auto-populates from the PO with the bill to address.   |
| <b>Ship To Address</b>       | Auto-populates from the PO with the ship to address.   |

| Item                       | Description  |
|----------------------------|--|
| <b>Line Level Taxation</b> | Allows you to tax line items at different rates if enabled.              |
| <b>Type</b>                | Displays the line items type.  |
| <b>Description</b>         | Provides a description of the good(s) and/or service(s) purchased.       |
| <b>Qty</b>                 | Shows the number of items.   |
| <b>UOM</b>                 | Shows the unit of measure.   |
| <b>Price</b>               | Displays the unit price.   |
| <b>Total</b>               | Displays the item total.   |
| <b>PO Line</b>             | Provides the PO line number associated with the invoice.                 |
| <b>Contract</b>            | Displays contract information, if any.                                   |
| <b>Billing</b>             | Displays the billing department associated with the PO.                  |
| <b>Subtotal</b>            | Displays the total price of only the items                               |
| <b>Shipping</b>            | Displays any shipping costs.   |
| <b>Handling</b>            | Displays any handling costs.   |
| <b>Misc</b>                | Displays any additional miscellaneous costs.                             |
| <b>Tax Code</b>            | Provides an editable tax code for the supplier to select when invoicing. |
| <b>Total Tax</b>           | Displays the total tax amount.   |
| <b>Total</b>               | Displays the invoice total.  |

| Status          | Description   |
|-----------------|---|
| <b>Approved</b> | The invoice has been accepted for payment by the customer.                    |
| <b>Draft</b>    | The invoice has been created, but hasn't been submitted to your customer yet. |
| <b>Pending</b>  | The invoice is currently with a business approver.                            |

| Status            | Description   |
|-------------------|---|
| <b>Processing</b> | The invoice is being processed by the AP department, and should be paid soon.           |
| <b>Voided</b>     | There's something wrong with the PO. Contact your customer to get the PO back on track. |

## Invoices

Use the invoices page to work with orders from your customers.

### Invoice and Payment Status

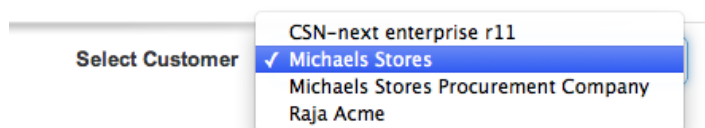
The invoice list displays all the invoices submitted by your organization to your Coupa customer. Here, you can check approval and payment status.

1. From the Menu, click **Invoices**.

#### Invoices

| <div> <span>Export</span> <span>View</span> <span>All</span> <span></span> </div> |                |          |      |          |
|---|----------------|----------|------|----------|
| Invoice #   | Created Date ▾ | Status   | PO # | Total    |
| 03-2015   | 07/12/15       | Approved | None | 3,955.00 |
| 02-2015   | 07/12/15       | Approved | None | 3,672.50 |
| 01-2015   | 07/12/15       | Disputed | None | 7,345.00 |
| Test12  | 04/29/15       | Disputed | None | 11.30    |
| test123   | 04/29/15       | Disputed | None | 11.30    |
| Per page 15   45   90   |                |          |      |          |

2. To see invoices for a specific customer, select the customer from the dropdown list just under the menu button. The first time you use the invoices page, you'll have to choose a customer. The next time you visit, it'll return to the last customer you chose.



The Invoices table lists all the invoices you've created for that customer. You can use the search bar to filter the list with a search term, or click the **View** dropdown to perform advanced filtering. See [Custom Views](#) for more info.

| Column                     | Description  |
|----------------------------|--|
| <b>Invoice #</b>           | This is the invoice order number generated by Coupa.   |
| <b>Created Date</b>        | This is the date the invoice was created on.   |
| <b>Status</b>              | This is the current status of the purchase order. See the Status List for more information.  |
| <b>PO #</b>                | This is the purchase order number generated by Coupa.  |
| <b>Acknowledged</b>        | <p>You can choose to let your customer know that you received their PO by selecting the <b>Acknowledged</b> checkbox on the purchase order. When you select the checkbox, the current date appears in the Acknowledge column.</p> <p>This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date will appear.</p> |
| <b>Items</b>               | List of items on the PO.   |
| <b>Total</b>               | This is the total amount of the purchase order.  |
| <b>Unanswered Comments</b> | You can now make comments directly on the purchase order for your customers to see. If your customer has left comments that you haven't responded to, you'll get notified here.  |
| <b>Actions</b>             | Use the edit icon to make changes to the invoice.  |

| Status          | Description  |
|-----------------|--|
| <b>Approved</b> | <p>The invoice has been accepted for payment by the customer. Payment status can be tracked on invoices that have been approved. Click the invoice number to open the invoice. New fields on the header will indicate payment information.</p> <div> <p><i>Approved invoices will reflect payment depending on your payment terms with your Coupa customer.</i></p> </div> |

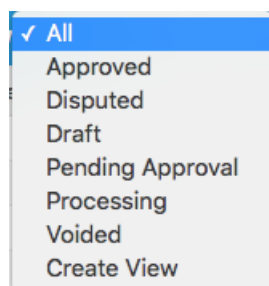
| Status                  | Description  |
|-------------------------|--|
| <b>Disputed</b>         | The invoice has been disputed or rejected by your Coupa customer. You will receive an email notifying you of the approver's reasons for rejecting the invoice in the <b>Comments</b> field. Disputed invoices cannot be edited in the CSP.<br><br>A new invoice must be created with a different invoice number because Coupa will not accept duplicate invoice numbers. |
| <b>Draft</b>            | The invoice has been created, but hasn't been submitted to your customer yet.  |
| <b>On Hold</b>          | The invoice has been put on hold for AP review.  |
| <b>Pending Approval</b> | The invoice is currently with a business approver.   |
| <b>Processing</b>       | The invoice is being processed by the AP department, and should be paid soon.  |
| <b>Voided</b>           | There's something wrong with the PO. Contact your customer to get the PO back on track.  |

## Custom Views

A custom view gives you the ability to create a set of advanced search filters, and save them.

### Creating a Custom View

1. Go to the Coupa table you want to set up a custom view for.
2. At the top of the table, click the **View** dropdown and select **Create View**.



3. In the next screen, specify the settings you want to use for your custom view, including the filtering conditions to use, the columns to include, and the sorting criteria. If you want to build this view off of another view and tweak those settings, use the **Start with view** option under the **General** settings. Refer to **Custom View Settings**, below, for more details.

## Create New data table view

### General

Name

Visibility ☒ Only Me  
☐ Everyone

Start with view

### Conditions

Apply  of these conditions:

is

### Columns

| Available columns | Selected columns |
|-------------------|------------------|
| Approval Group    | Invoice #        |
| Commented         | Created Date     |
| Comments          | Status           |

- Click **Save**.

## Custom View Settings

Customize these settings when creating or editing a custom view for a Coupa table.

| General                | Description   |
|------------------------|---|
| <b>Name</b>            | The custom view name, visible from the View dropdown on top of the table.                                 |
| <b>Visibility</b>      | Decide whether this view can be visible to only you or all other Coupa users that can see the main table. |
| <b>Start with view</b> | Use this option to load another views settings and then tweak them to fit your needs for this view.       |

| Conditions   | Description   |
|--------------|---|
| <b>Apply</b> | <p><b>All</b> of these conditions: Coupa displays results only for objects that meet all of the conditions you add in this list.</p> <p><b>Any</b> of these conditions: Coupa displays results for objects that meet at least one of the conditions you add in this list.</p> |

| Conditions        | Description   |
|-------------------|---|
| <b>Conditions</b> | Create conditions based on the data available in Coupa. |

| Columns                  | Description  |
|--------------------------|--|
| <b>Available columns</b> | This list depends on the table you're working with in Coupa. You can select any of these columns to add into your custom view.                     |
| <b>Selected columns</b>  | These are all the columns Coupa displays with this custom view. It displays them, from left to right, in the same order that you set them up here. |

| Default Sort Order        | Description   |
|---------------------------|---|
| <b>Default Sort Order</b> | Choose the column you want results sorted by and whether to sort them in ascending or descending order. |