

intuit.



Coupa Supplier Portal Supplier Guides

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Coupa Supplier Portal

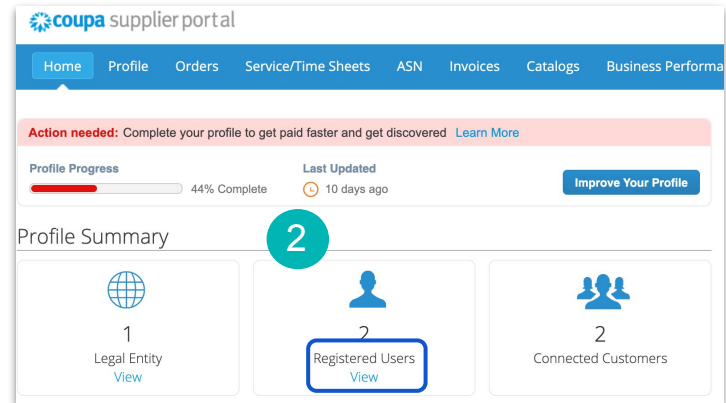
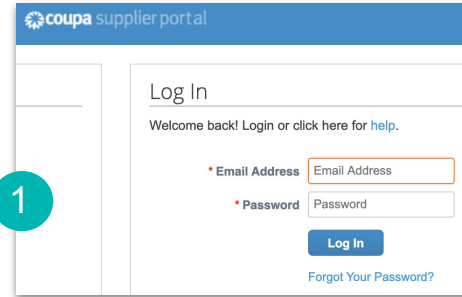
How to Add Users

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



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 harita_weisbard@intuit.com 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

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

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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#**

1

coupa supplier portal

Log In

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

* Email Address

* Password

[Forgot Your Password?](#)

2

coupa supplier portal

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

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

View Open Orders Search

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

4

intuit.



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.

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 # that the invoice applies to from the drop down list

coupa supplier portal

1

Log In

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

* Email Address

* Password

[Forgot Your Password?](#)

coupa supplier portal

2

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

3

Select Customer INTUIT - 1

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

View Open Orders Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
US0001233	03/30/21	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**

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 copy of the invoice by clicking **Choose File**. Acceptable file types include PNG, GIF, JPG, JPEG, PJPEG, TIFF, and PDF.

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

In addition to the required fields we ask that you **always include an invoice image**

Total USD 240,000.00

5

Create Invoice Save Print View

Create Invoice Create

General Info

* Invoice #

* Invoice Date 04/12/21

* Payment Term Net 30

* Currency USD

Status Draft

Image Scan No file chosen

Supplier Note

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

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. 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.

Lines 7

Type	Description	Price	4,970,000.00 ✖
	Management Consu	4,970,000.00	

PO Line: US0001202-1 [Clear](#) Contract: Supplier Part Number:

Billing: 100-053-5500-61010-000

Lines 7

Type	Description	Qty	UOM	Price	500.00 ✖
	INBOX ENTRY 227	5,000	Each	100.00	

PO Line: CA0001222-1 [Clear](#) Contract: Supplier Part Number:

Billing: 230-324-4200-63000-000

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="text"/>	0.000	0.00	<input type="text"/>

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

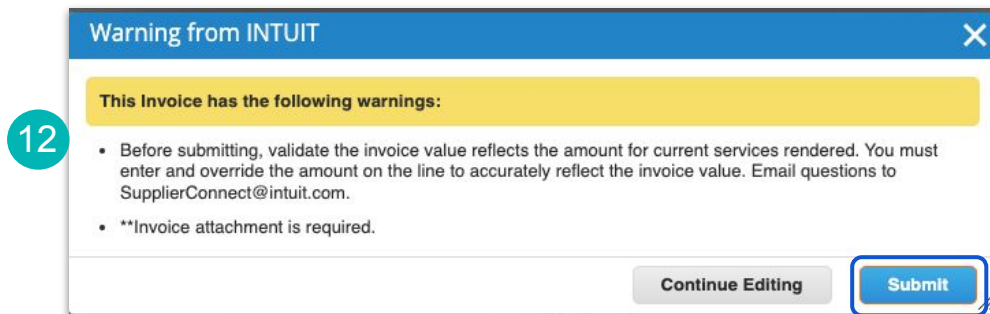
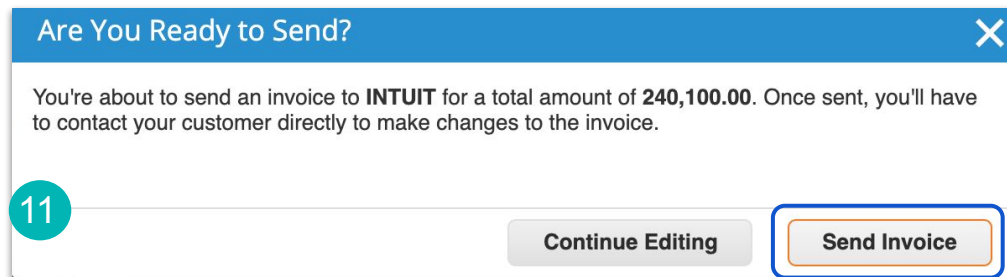
Total Tax	0.00
Net Total	240,000.00
Total	240,000.00

Buttons: Delete, Cancel, Save as Draft, **Calculate**, Submit

Step 11: 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 12: 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.



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Coupa Supplier Portal

How to Check Invoice & Payment Status

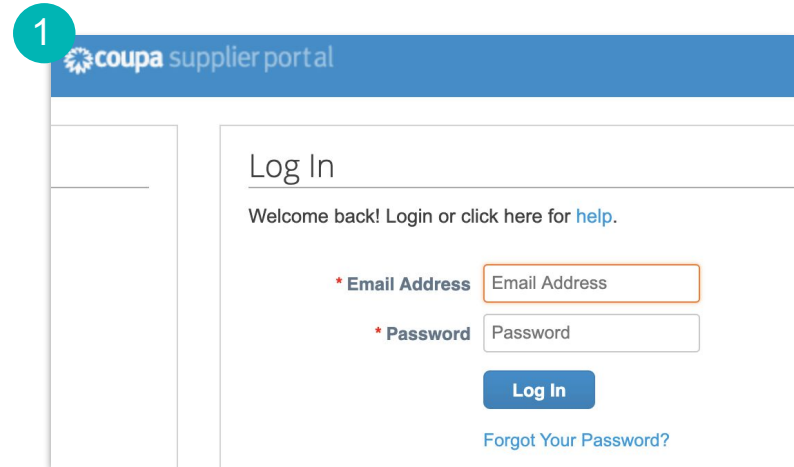
Supplier Guide: How to view invoice and payment status

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.

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

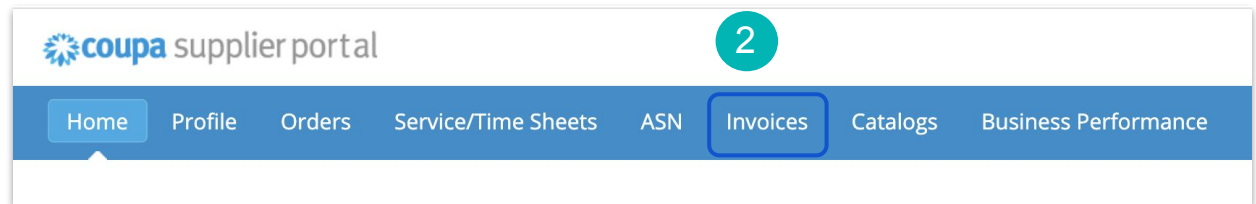
Welcome back! Login or click here for [help](#).

* 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

coupa supplier portal

HARITA | NOTIFICATIONS 3 | HELP

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

Invoices Invoices Lines Payment Receipts

Select Customer INTUIT

Invoices

Invoice deleted

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

Create Invoices

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
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

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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
Total Reconciled				60,000.00
Invoice Total				60,000.00
Remaining Balance				0.00

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
 27924 Upgrade street
 27930 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 FY21						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
Total	60,000.00

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.