

MSK Supplier Portal Guide

Powered by Coupa

Rev 15 05202022



Memorial Sloan Kettering
Cancer Center.

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A) BACKGROUND

This Guide is for the MSK Supplier Portal powered by Coupa (CSP), which is a free tool for suppliers to easily conduct business with MSK. In the CSP you will also manage various content and settings.

Some of the content and available information is:

- Ability to view invoice status and payment information
- View purchase orders from all your customers
- Ability to easily create po-based invoices online via “PO flip”
- Non-po invoices can also be created online in the CSP

Please note that the initial supplier set-up process consists of the following:

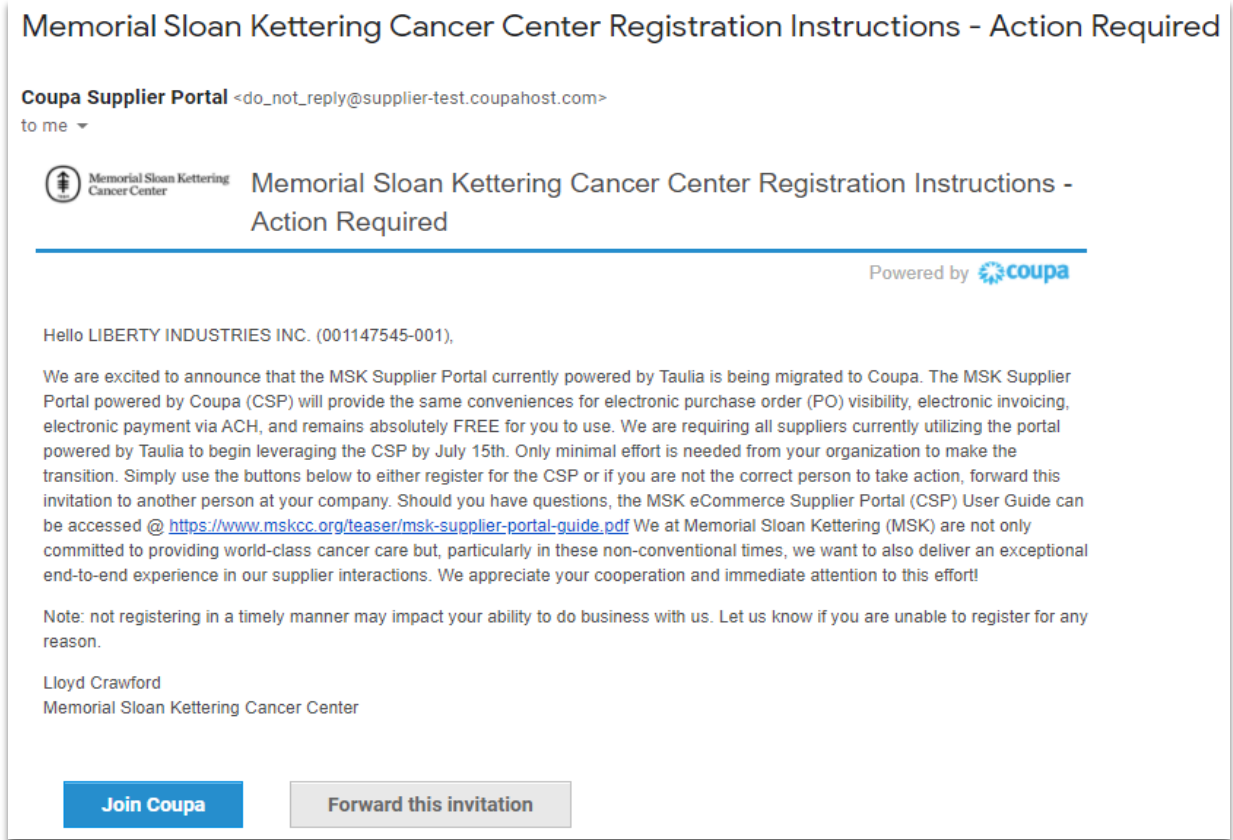
- Registering your eCommerce Supplier Portal (CSP) account.
- Creating your Legal Entity
- Setting your Coupa Accelerate / Early Payment Discount Preferences

B) HELPFUL HINTS & WHERE TO GO FOR HELP

- If you need assistance registering in the CSP or updating your Company's banking information please email ***CSPSupplier@mskcc.org***
- The recommended internet browser for Coupa is **Chrome**. You might experience functionality and navigation issues using other internet browsers.
- Please be aware of the autofill settings on your browser. If they are turned on, data may populate incorrectly in your Profile.
- When using the CSP, due to the thousands of suppliers utilizing the database, please note that it may take a few minutes for your MSK profile to load.
- Some companies may have multiple MSK profiles. This is due to the MSK Procurement Department's configuration. **PROFILES ARE INDEPENDENT AND CANNOT BE MERGED INTO ONE. Please contact your MSKCC Procurement Representative for more information.**

C) REGISTER FOR THE CSP WITH AN INVITATION FROM MSK - FIRST TIME USERS

You will receive the following e-mail from the MSK Supplier Portal powered by Coupa (aka the Coupa Supplier Portal or the CSP) which contains a unique link at the bottom of that email to join the CSP. Click on the **blue JOIN COUPA rectangle** and you will be directed to the Coupa Supplier Portal to register your account.



Important note: You must register for the CSP using the email address that received the invitation. If you would like to register for the CSP using a different email address or if you are not the correct person to complete the forms, please e-mail CSPSupplier@mskcc.org.

If you would like to have the invitation sent to multiple users, you will receive an additional e-mail with a SUGGESTION e-mail.

Subject: Add Users to Account



Add Users to Account

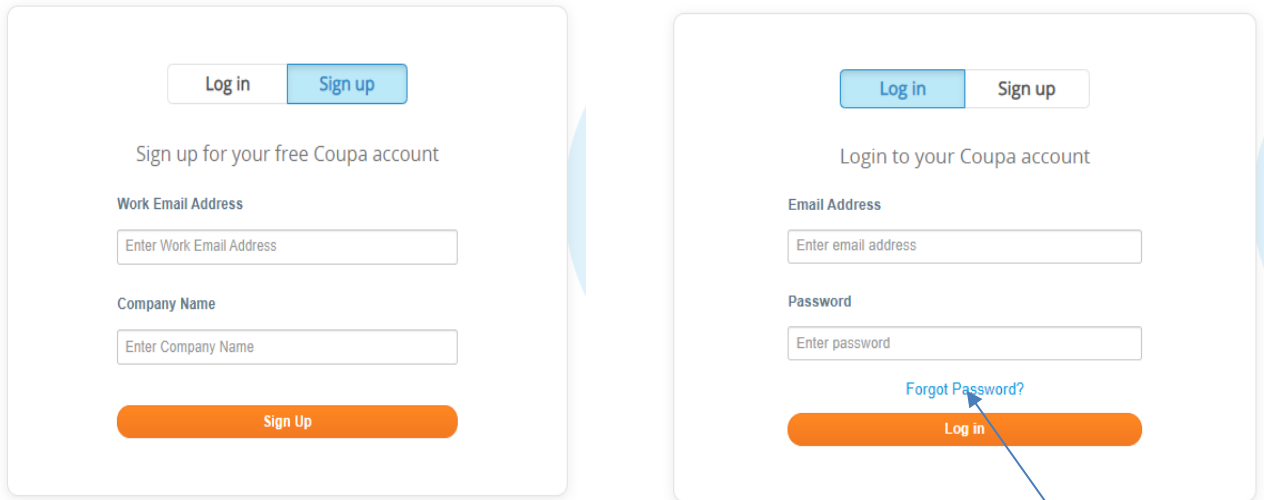
Hello Lloyd,
Customer Memorial Sloan Kettering Cancer Center is suggesting the addition of loydacrawford@gmail.com and contemposphoto@aol.com as users to your account.



Business Spend Management

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

DO NOT FORWARD THE INVITATION UNLESS THE RECIPIENTS WILL BE SIGNING IN WITH THE E-MAIL THAT WAS INVITED.



Click **“Sign Up”** if you are a new user & **“Log In”** if you are an existing Coupa User.

If you are already a registered or existing Coupa user and you forget your password, click **Forgot Password** and an email will be sent to the registered email address with the following information:

Subject line: Requested Password Reset Instructions for Coupa

Body email: A password reset request was initiated for your user's account. You can click the button below to create a new password.

If you did not initiate this request, please review your login settings, add two-factor authentication to improve security, and notify someone at your company per your internal policies if you think this email may have been malicious.

Create New Password

Helpful Hint: Save <https://supplier.coupahost.com> as a favorites link for quick access when you need to return to the site. The link in the email **will expire after 7 days**.

The Coupa Supplier Portal will be your home screen, and a dashboard of information about your Company will be displayed.

Note: you do not need to take any actions to complete your Company Profile during your initial set-up. Profile updates are only necessary when changing your Company information.

If you are a new user, your e-mail must be verified. A verification e-mail will be sent to you. Click On **"CONFIRM E-MAIL"**



The screenshot shows a web form titled "Activate your Coupa account" for the user "Lloydacrawford@gmail.com | Liberty Industries". The form is divided into several sections: "Your name" with two input fields for "Enter first name" and "Enter last name"; "Company" with a dropdown menu showing "Liberty Industries"; "Create a Password" with instructions "Use at least 8 characters and include a number and a letter." and two input fields for "Create Password" and "Confirm Password"; a checkbox for "I accept the Privacy Policy and the Terms of Use."; and an orange "Activate Coupa Account" button at the bottom.

After you have confirmed the e-mail, the following information must be completed

Enter the First Name of the Coupa User
Enter The Last Name of the Coupa User

The Company Name should be populated from your previous entry

Follow the directions for creating a password

Click on the acceptance of [Privacy Policy](#) and [Terms of Use](#)

Memorial Sloan Kettering Cancer Center

Powered By **coupa**

Basics Payment Coupa Profile

Get paid by credit card

Confirm Email Address

This is the email address you use for credit card payment

[My company does not accept credit card payment](#)

Back Next

You will be asked if you want to get paid via credit card / Virtual Card. If you wish to receive payment for your Company's invoices via credit card , then either confirm the default e-mail address or change it.

****Note: if you choose to be paid via credit card and then change your mind, you can deactivate this choice in Setup – Remit To and then disable this option.***

If you do not wish to receive payment for your Company's invoices via Virtual Card you should select "**My company does not accept credit card payment**" and move forward.

Memorial Sloan Kettering Cancer Center

Powered By **coupa**

Basics | **Payment** | Coupa Profile

Would you like to offer discounts to get paid faster? [?](#)

Memorial Sloan Kettering Cancer Center has chosen to offer your company these optional payment terms to get paid faster. These terms can always be updated or removed from the Setup menu in this portal. If you believe the net term is incorrect, please contact Memorial Sloan Kettering Cancer Center after you complete the onboarding process.

Choose from the payment discount terms Memorial Sloan Kettering Cancer Center has set

- 2/15N60
- 1/40N60
- 1.5/30N60
- 2/20N60
- 2.5/10N60
- 1/45N60
- 1/50N60
- 20/55N60
- My company does not offer discounts

[Back](#) [Next](#)

Static Discounting is explained in more detail in another section of this Guide. However, if you wish to activate this feature, **depending on original payment terms**, select one of the discount terms displayed. If you not want to offer accelerated discounts select **“My company does not offer discounts”**.

After you have logged in, you will be at the **HOME** screen

D. UNDERSTANDING THE CSP HOME SCREEN STRUCTURE

coupa supplier portal

JACK | NOTIFICATIONS | HELP

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

Setup

New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress Last Updated 2 months ago [Improve Your Profile](#)

Profile Summary

- 1 Legal Entity [View](#)
- 1 Registered User [View](#)
- 1 Connected Customer

Banking Info Diversity Accelerate Bribery Policy

Website Industry About Established Top Commodities Currencies Public Profile [Profile](#)

Announcements [View All \(2\)](#)

- Announcements** (Memorial Sloan Kettering Cancer Center)
Delete all purchase order lines not included on the current invoice being submitted.
- CSP User Guides** (Memorial Sloan Kettering Cancer Center)
For additional details on utilizing the CSP please refer to the following: MSK eCommerce Supplier

One-Click Savings [View All](#)

- Start saving today!**
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

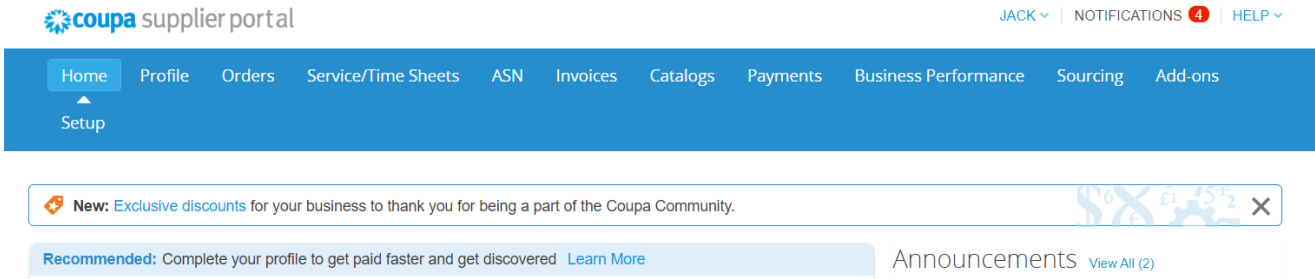
If your company has multiple CSP accounts, merge them to reduce confusion for your customers. [Learn more](#)

[Request Merge](#)

Latest Customers
Memorial Sloan Kettering Cancer Center

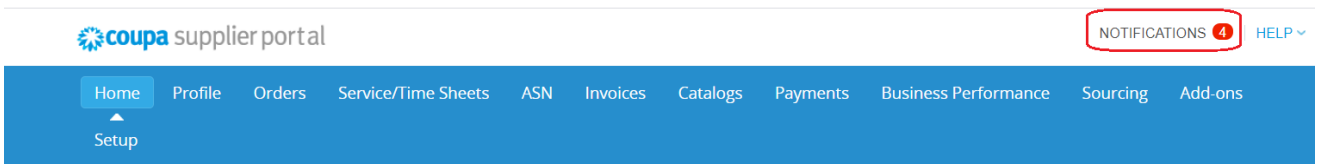
1. Navigation Bar

You can configure your account and administer your connection through the CSP. Access to these tabs provides you with the real-time status of your invoices with MSK. You can even communicate with MSK by entering comments within the CSP.



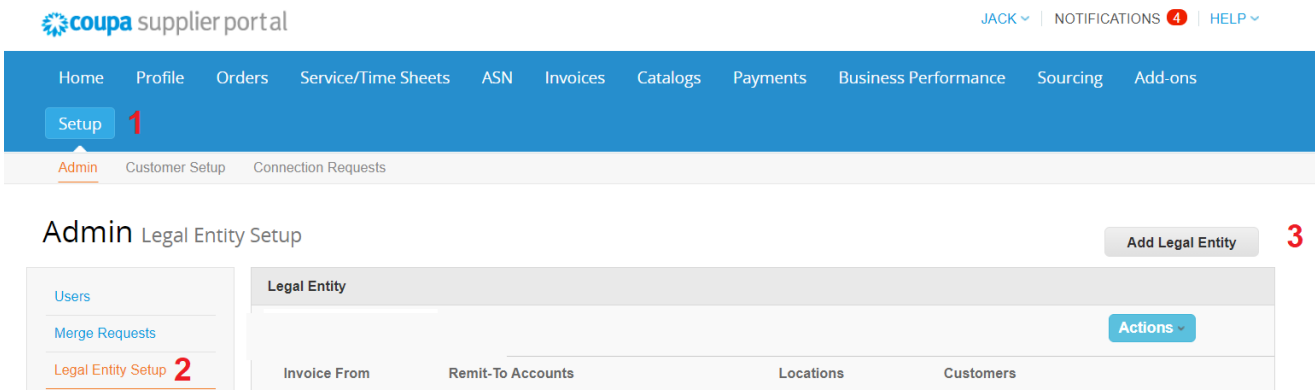
2. Notifications

In the top right-hand section of the home screen, you will see a red bubble next to Notifications. You can readily see if there is anything requiring your attention.



E. CREATE A LEGAL ENTITY & PAYMENT TYPES

If your company has not connected with other customers on the CSP, you'll need to create a **Legal Entity**. Navigate to the **Setup** tab and click **Legal Entity Setup**. Then hit **Add Legal Entity**.



After clicking **Add Legal Entity**, you will see the different data entry screens that you must complete. Explanations of the various sections are contained in the following pages.

- Provide a Legal Entity Name and enter the principal Country where your business is located.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* 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

You can select which customers you would like to see this update, or you can select All if it pertains to every customer listed.

Which customers do you want to see this?

- All
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (123456-001) 
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (123456-W01) 
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (U123456-001) 
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-001) 
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-002) 
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-001) 
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT, INC. (136378-003) 

- Complete the required (*) invoicing fields when prompted by the CSP. **When entering address information in Address Line 1 and Address Line 2, please insure you do not exceed 35 characters on each Address line.** Although the "State" field does not contain an asterisk (*), it must be filled in. You can also "Use this address for Remit To" and "Use this for Ship From Address" if you do not uncheck the designated sections below. Complete the "Tax ID". Everything else is optional.

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

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

What is your Tax ID?

Country/Region ×

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

- After completing the required address information, click “Save and Continue”
- On the next screen, you will be able to enter additional information depending on which “*Payment Type” you will be using. The information to be entered will depend on whether you choose “Address”, “Bank Account” or “Virtual Card”.

Address – Used for mailing of checks

x

Where do you want to receive payment?

1 2 **3** 4

* Payment Type
What is your Remit-To Contact's?

Address Line 1 555 N Mountain Avenue
Address Line 2
City Montclair
State AZ
Postal Code 07043
Country/Region United States

- **Filling in the "Address" and/or "Bank Account" information WILL NOT trigger anything on the MSKCC side of the application without an official form being sent from MSKCC.**
- **Selecting Virtual Card WILL trigger MSKCC to proceed with virtual card setup.**

Bank Account - (Used for getting paid via ACH)

- Fill in all information as shown below for "What are your Bank Account Details?"
- Fill in all information as shown below for "What is your Bank's Branch Address?"
- Who is your Remit-To Contact? - not Needed
- Click **Save and Continue**

Where do you want to receive payment?



1 2 3 4

• Payment Type Bank Account ▾

What are your Bank Account Details? ⓘ

Bank Account Country/Region:	United States
Bank Account Currency:	USD ▾
Beneficiary Name:	YOUR COMPANY NAME
Bank Name:	Chase
Account Number:	123456789 ⓘ
Confirm Account Number:	123456789
ACH Routing Number:	021000021 ⓘ
Wire Routing Number:	<input type="text"/> ⓘ
SWIFT/BIC Code:	<input type="text"/> ⓘ
Bank Account Type:	Business ▾
Supporting Documents	Choose Files No file chosen ⓘ

What is your Bank's Branch Address?

Address Line 1:	589 Mountain Avenue
Address Line 2:	<input type="text"/>
City:	Brooklyn
State:	Alaska - AK ▾
Postal Code:	12356

Who is your Remit-To Contact? (optional) >

What is your Remit-To Address?

Address Line 1 555 N Mountain Avenue
Address Line 2
City Montclair
State AZ
Postal Code 07043
Country/Region United States

Cancel

Save & Continue

Virtual Card - *(Used for getting paid via Virtual Credit Card)*

- Fill in the recipients e-mail address
- Fill in the general remit to Address – (This may be populated already)
- Integration Code can be left black unless otherwise instructed
- Click **Save and Continue**

x

Where do you want to receive payment?

1 2 **3** 4

* Payment Type Virtual Card ▾

Virtual Card information

* Email Address

Process credit cards automatically? **DO NOT CHECK THIS BOX UNLESS INSTRUCTED TO DO SO**

What is your Remit-To Address?

* Address Line 1

Address Line 2

* City

State Select an Option ▾

* Postal Code

* Country/Region United States ▾

What is your Remit-To Integration Code? (optional) i >

◀▶

Cancel Save & Continue

Virtual Card Guidelines

Before activating a virtual card, please review pertinent details by utilizing the link below. This will help familiarize you with the Coupa Pay application and will answer any preliminary questions you might have.

<https://supplier.coupa.com/memorial-sloan-kettering-payment/>

Also, please note the following setup guidelines and requirements which will facilitate your use of the Coupa Pay application:

- When requesting a Supplier Payment Account, the email on the Supplier Payment Account should belong to the individual who actually will be receiving the Virtual Card and will be charging payments to the Card.
- Emails containing all information pertaining to Virtual Card usage, charging the Card etc. will be sent by no.replies@paymentnet.jpmorgan.com to the email address on the Supplier Payment Account.
- If your Company is linked to the Coupa Supplier Portal, the individual whose email is on the Supplier Payment Account will automatically receive remittance advice emails, but such emails will be sent separately from the Virtual Card usage emails.
- In order for an individual from your Company to receive other emails pertaining to Coupa Pay transactions related to Virtual Cards, they must be setup by the Administrator in the Coupa Supplier Portal with the Payments role, and they must also have the appropriate notifications enabled for both Online and Email.
- **Would you please confirm the following:** The email on the Supplier Payment Account request belongs to the individual who will actually be receiving the Virtua Card and will be charging payments to the card.

Would you also please let us know if you currently use a Third Party Payment Provider and also the name of that Provider if applicable. This information will help facilitate your Coupa Pay setup.

Finally, would you please provide the best email address and phone number for contacting you if you need assistance or have any questions so that anyone copied above can reach out to you directly.

The screen shown below allows you to confirm where you will be receiving payment. You also have the option to add another remit-to by clicking “Add Remit-to”, completing the applicable information and then clicking on **NEXT** when done.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	1824 RAINBOW LANE WOONSOCKET RI 02895 United States	Active	<button>Manage</button>

Deactivate Legal Entity Cancel Next

This screen verifies where you ship goods from. You also have the option to add another Ship From address by clicking “Add Ship From” , completing the applicable information and then clicking **NEXT** when done.

Where do you ship goods from?

1 2 3 4

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

Add Ship From

Title	Status	
1824 RAINBOW LANE WOONSOCKET RI 02895 United States	Active	<button>Manage</button>

Deactivate Legal Entity Done

Setup Complete



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** [i](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders](#)

[Go to Invoices](#)

[Return to Admin](#)

[Done](#)

F. SET COUPA PAYMENT TERM PREFERENCES/ EARLY PAYMENTS /ACCELERATED DISCOUNTS

This section is to be used ONLY IF EARLY PAYMENT DISCOUNTS are desired.

.....Navigate to the **Setup tab**, click **Payment Preferences, Static Discounting**, and then click **Edit**

The screenshot shows the Coupa Admin interface. At the top, there is a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below this is a sub-navigation bar with 'Setup' highlighted and a red '1' next to it. Under 'Setup', there are links for 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' link is selected, and the page title is 'Admin Static Discounting'. On the left side, there is a sidebar menu with various options: Users, Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences (with a red '2' next to it), Static Discounting (with a red '3' next to it), SFTP Accounts, cXML Errors, and SFTP Errors. The main content area is titled 'All Customers' and contains a table with two columns: 'Your original payment term' and 'Your preferred term'. The table lists payment terms from Net 30 to Net 120, all with 'None' in the preferred term column. Below the table are fields for 'Approver name', 'Approver email', and 'Apply static discounting' (set to 'No'). A red '4' is next to an 'Edit' button in the top right corner of the table area.

The Payment Terms are determined at the initial supplier setup. Memorial Sloan’s default payment terms are N60.

Static Discounting

Set your static discounting preferences here before you submit any invoices and Coupa will automatically update payment terms on future invoices based on these settings. You can define global settings which will apply to all your buyers using Static discounting, or set unique settings for a particular buyer which will override the global settings. Use this setting if you want to offer discounts on all Future Invoices you submit to your buyer. Email accelerate@coupa.com if you need any assistance.

Your original payment term Your preferred term

Net 30	None
Net 45	None
Net 60	None
Net 75	None
Net 90	None
Net 120	None

Person or Group at your company (typically finance or treasury) who has approved your preferred Static Discounting payment term

- Name

- Email

Apply to ALL invoices. (Including non-PO invoices and Coupa invoices not submitted through this Supplier Portal). [Learn more](#)

To initiate Early Payment Discounts, you must first know what your original payment terms are... N30, N45, N60 etc.

Once that is determined, you can **ONLY** Choose the options listed under your default payment terms.

For example...If your initial payment terms are N30, you can ONLY choose options from the N30 dropdown menu.

- Selection of Terms
 - Select the desired option from your ORIGINAL payment Term.
- Name and Email
 - Enter the name and email of the person or group who approved these accelerated terms.
- Checkbox
 - Selecting the “Apply to ALL invoices” checkbox below will automatically accelerate all invoices. By leaving this box unchecked you can choose to accelerate or not accelerate invoices at the transaction level.

NOTE* If a special payment term- other than the normal payment term - is selected at the PO level, it cannot be overridden.

G. CSP FUNCTIONALITY

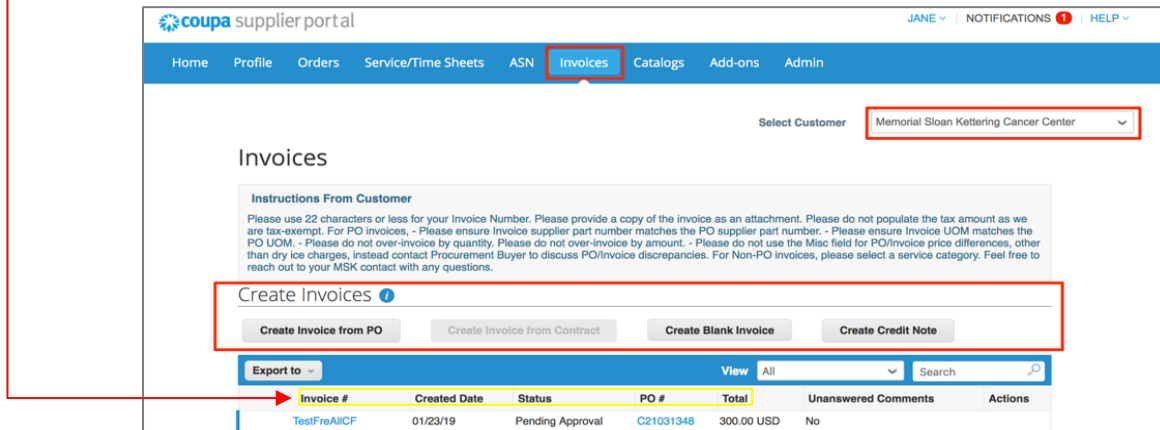
1. Invoices

Important Note – Invoices Against Purchase Orders

The following only applies to invoicing against purchase orders and/or purchase order lines with a unit of measure of **“DO” and a unit price of \$1.00**: the line amount must always match the line quantity. For example, if you have an invoice totaling \$504.75, the invoice line amount must be entered as \$504.75 and the invoice quantity must be entered as 504.75

- Selecting **“Invoices”** from the menu will take you to a screen where you can view invoices. This will provide a summary of all previously entered invoices. Clicking on the blue **“invoice#”** will open the invoice.
- This screen provides a real-time view into the current stage of the invoice status.
 - “Approved”** indicates the invoice has been processed for payment.
 - “Draft”** invoices HAVE NOT been submitted to MSK and can be edited by clicking on the pencil icon in the **“Actions”** column.
 - “Pending Approval”** indicates the invoice is pending approval in Coupa by MSK.

NOTE: Click on Any Column to Sort in Ascending or Descending Order



- Creating invoices

NOTE: Depending on your initial setup with MSK, the ability to create invoices may not be available to you when you first log into the CSP.

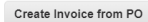
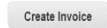
- **Create Invoice from PO**
 - Clicking this button will allow you to create a PO backed invoice. Specific information will populate certain required fields directly from the PO (such as **“Bill to Address”**).
 - **Be certain to delete all purchase order lines from the current invoice that are not actually being invoiced against within that invoice.**
 - **Invoices must be dated when shipments are released or when services are provided.**
- **Create Invoice from Contract**
 - If your supplier provides you with a contract you can invoice from, this button will become available, otherwise it will remain inaccessible.
- **Create Blank Invoice**
 - If this button is available under your MSK Profile, then clicking this button will allow you to create a non-PO backed invoice. If either a Service Category or Invoice Header Account Number is required, you will be advised accordingly.
- **Create Credit Note**
 - Always select **“Resolve issue for invoice number”** and do not select **“Other”**.
- **Please be sure to complete all other required fields (*)**
 - For **Requester Email** please enter your MSK contact or na@na.com if not known
 - For **Requester Name** please enter your MSK contact if known or **“NA”** if unknown.
 - For non po invoices insure that you select the previously designated values for **“Bill to Address”**.
 - **If a Work Order Number is required as supporting documentation for the invoice, please insure that an attachment containing the Work Order Number is included with the invoice. Also, the Work Order Number must be entered in the “Supplier Part Number” section of the invoice line.**

- **Transmitting Invoices Electronically (cXML, CSV, EDI)**
 - Electronic invoicing utilizing any of the above file formats will require special testing and co-ordination between suppliers and MSKCC. Please reach out directly via e-mail to CSPSupport@mskcc.samanage.com for additional information.
- Important Additional Notes – Applicable to All invoices
 - **MSKCC is tax exempt. Therefore, taxes are never to be included in any field of any invoice.**
 - **All invoices (po backed or non po backed) must include a pdf copy of the Company invoice as an attachment.**

2. Creating an Invoice from a PO – MSKCC Common Practice

There are three ways to create an invoice from the PO:

- From the “Orders” Tab, Select the gold coins to the right of the PO number
 - **Red Coins are for processing credits**
- From within the Purchase Order, at the bottom, click Create Invoice
- From the “Invoice” Tab, select Create Invoice from PO



Once selected, If you have multiple profiles, you may get a screen asking for Invoicing Details. Select the Legal Entity, Remit-To and Ship From Address.

If you only have ONE profile,

- The address selected will populate on the newly created invoice as well as other information from the PO
- Manually enter the invoice number. **NOTE: THE SYSTEM WILL WARN IF A DUPLICATE INVOICE NUMBER IS USED.**

Create Invoice Create

General Info

* Invoice #

* Invoice Date

Payment Term Accelerated

* Currency

Status

Shipping Term

Image Scan No file chosen

Supplier Note

Attachments | |

From

* Supplier TRANSFORMATION MANAGEMENT CONSULTING, LLC (137614-001)

Supplier Tax ID

* Invoice From Address SILENT1
1644 WINDSOR ROAD
SALT LAKE CITY, UT 84103
United States

* Remit-To Address SILENT1
1644 WINDSOR ROAD
SALT LAKE CITY, UT 84103
United States

* Ship From Address SILENT1
1644 WINDSOR ROAD
SALT LAKE CITY, UT 84103
United States

To

Customer Memorial Sloan Kettering Cancer Center

Account Number

Service Category

Originating System PO 985679

- The invoice date will default to today's date
 - **If the invoice is older than the day of input, you can only back date this section 45 days for the date of entry. Backdating further than the allowable 45 days will place the invoice in a "Dispute" status**
- If special accelerated terms are selected, you may click the button to activate.
- Currency stays at USD.
- Shipping Terms can stay as "Best Way"
- **DO NOT PLACE ANY ATTACHMENTS IN THE "IMAGE SCAN" AREA**
- Supplier Notes can be left blank but feel free to enter any additional information if needed
- Attach INVOICE (PDF) and any other documents in the "Attachment, Add, File" Section

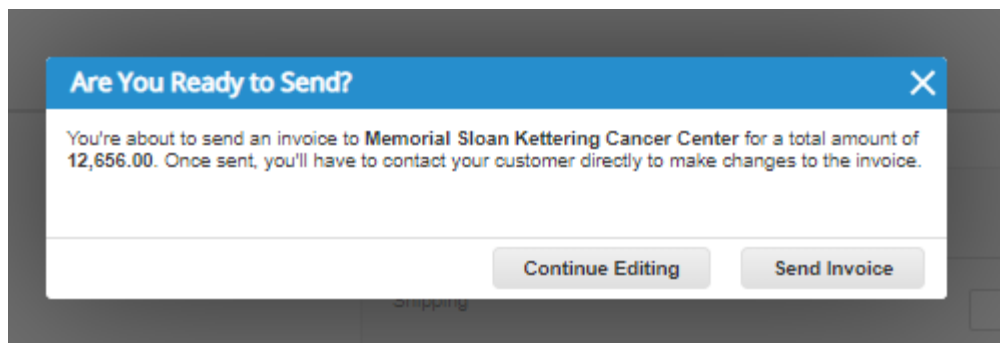
Account Number & Service Category are left blank unless processing a Non-PO backed Invoice. Please contact finance at crawforl@mskcc.org for further instructions.

Depending on how the PO is set up, you may or may not have to adjust any fields on the lines

The screenshot displays a procurement system interface. At the top, there's a 'Lines' section with a table containing one line item: 'GRATITUDE' with a quantity of 100,000, a unit of measure 'CA (Case)', and a price of 100.00. The total for this line is 10,000.00. Below this, there are fields for 'PO Line' (985679-1), 'Contract', and 'Supplier Part Number' (12345). A 'Totals & Taxes' section is visible, showing 'Lines Net Total' as 10,000.00. Below this, there are input fields for 'Shipping', 'Handling', 'Misc', and 'Tax'. The 'Tax' field is currently set to 0.000%. The 'Total Tax' is 0.00, and the 'Net Total' is 10,000.00. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A 'Comments' section is also present at the bottom with an 'Enter comment' field.

- Shipping, Handling & Misc must prior be agreed upon with the procurement department
- Tax must be left blank because MSKCC is tax exempt. Tax Exempt certificates are available from Finance upon request
- Once you are satisfied, click the “Calculate” button to update the Total.
- You can “Save as Draft” and continue working on the invoice at a later time or you can “Submit”.

Once “Submit” is clicked, a pop-up message will appear. Click “Send Invoice” to finish .

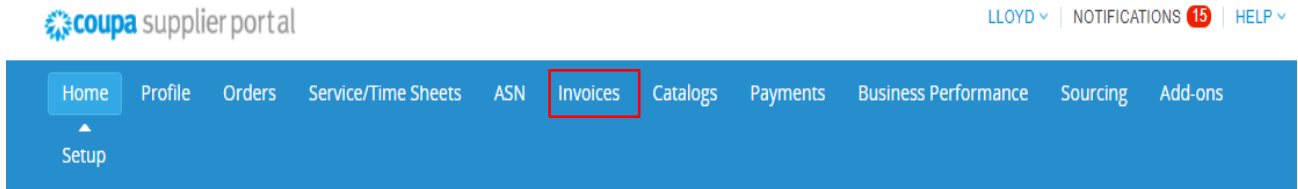


2. Obtaining Payment Information:

Currently, Coupa does not provide remittance information for ACH payments. You can create a view to show invoices that have been "PAID."

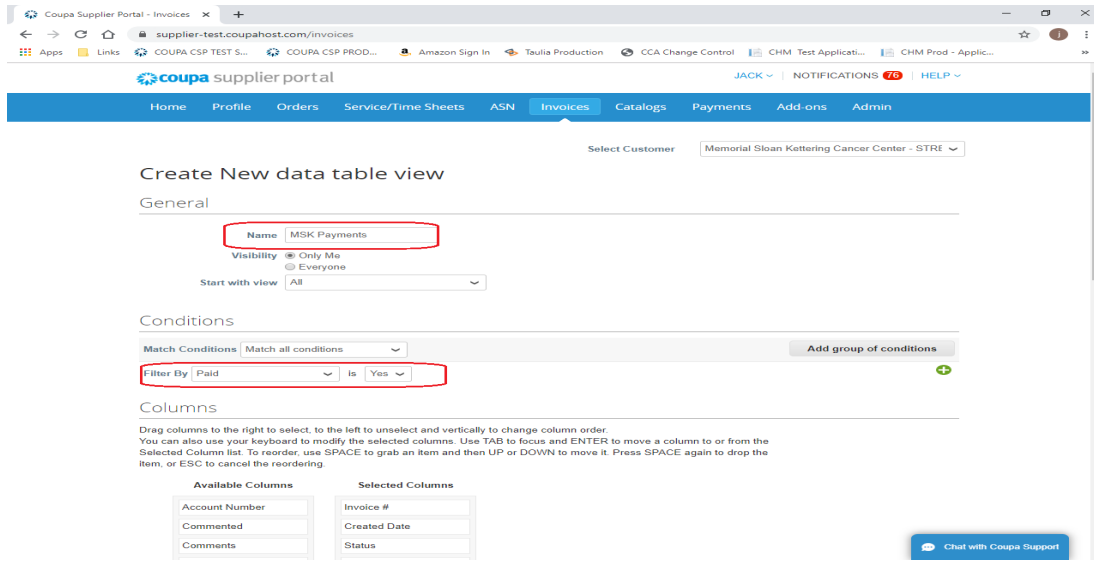
You can check for payment information by creating a custom view and utilizing the listed steps. Make sure you are in the Invoice section – Click on the "Invoices" tab

- a) In the drop down to the right of "View" Click "Create View"

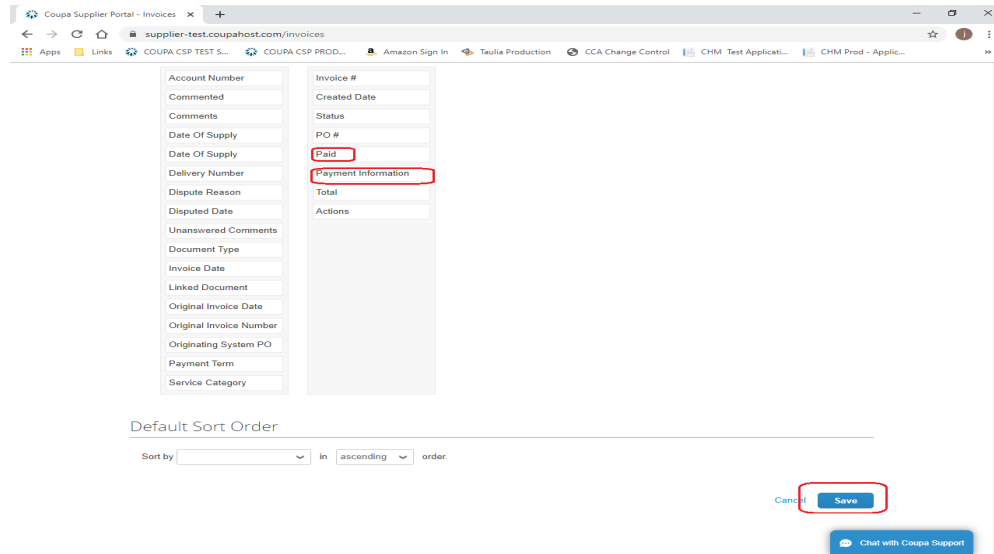


Invoice #	Created Date	Status	PO #	Paid	Payment Information	Total	Actions
6434311	10/17/19	Approved	C21262632	Yes	All		SD
6434309	10/17/19	Approved	C21262635	Yes	Abandoned		SD
6420019	06/17/19	Approved	C21086423	Yes	Approved		SD
6419036	05/06/19	Approved	C21074717	Yes	Credit Notes		SD
6412405	11/01/18	Approved	C20989886	Yes	Disputed		SD
6412406	11/01/18	Approved	C20989882	Yes	Disputes with a supplier response		SD
6411868	11/01/18	Approved	C20983339	Yes	Disputes without supplier response		SD
6393136	01/09/18	Approved	C20769309	Yes	Draft		D
6388790	10/27/17	Approved	C20718002	Yes	Payment Information		D
6378625	07/03/17	Approved	C20607564	Yes	Pending Approval	439.58 USD	D
6366690	04/06/17	Approved	C20479076	Yes	Processing	186.22 USD	D
6373337	04/05/17	Approved	C20550353	Yes	Mailed	214.56 USD	D
6371474	02/24/17	Approved	C20530841	Yes		432.54 USD	D
6371530	02/24/17	Approved	C20529850	Yes		874.29 USD	D

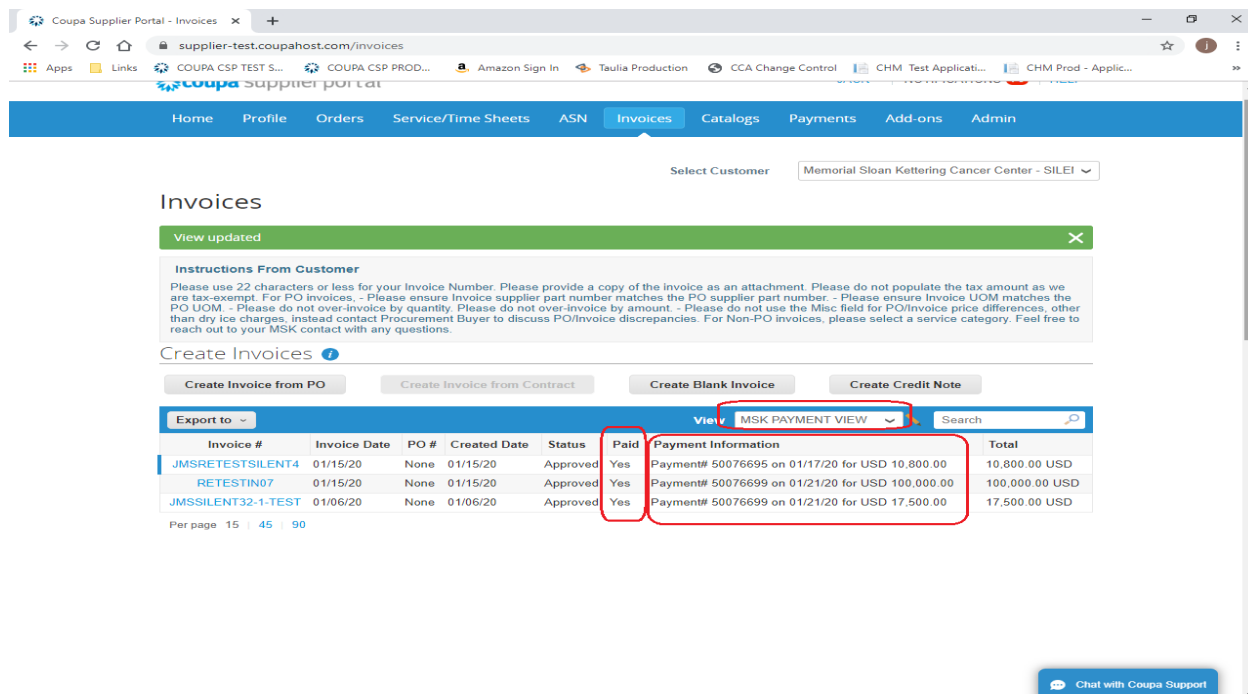
- b) Enter the view name as something you will remember such as "MSK Payments". Under Conditions, after "Filter By" choose "Paid" from the drop-down and after "Filter Clause" choose "is" "Yes".



- c) Drag and drop fields such as “Paid” and “Payment Information” from the left column to the right column.

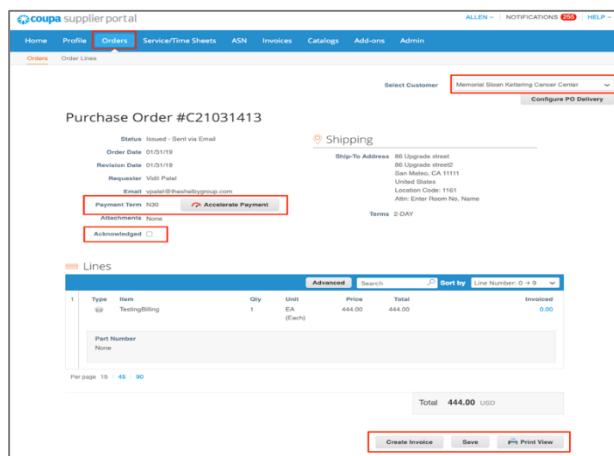
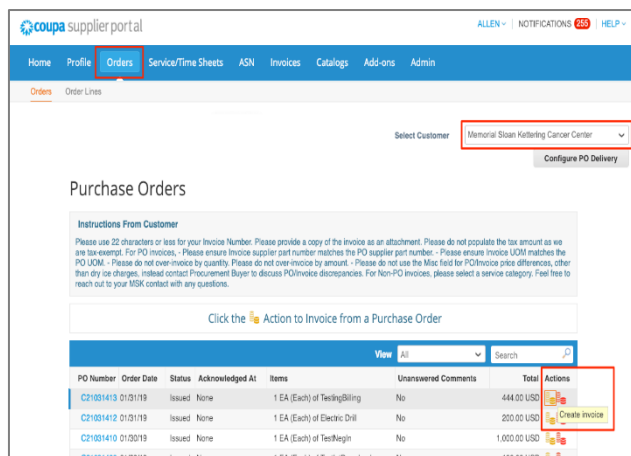


- d) Click “Save”. You will now see the the associated payment details pertaining to paid invoices.



3. Purchase Orders

Selecting the “Orders” icon from the navigation bar will take you to a screen where you can view purchase orders. This will provide a summary of all POs from MSK when Memorial Sloan Kettering Cancer Center is the selected customer. Clicking on the blue PO number will open another screen to see the entire PO.



- Payment Terms

You will notice you can Accelerate your payment with the button to the right of your standard Payment Terms.

- Acknowledged

Checking this box will notify MSK you have received the Purchase Order.

You may have more than one profile with MSKCC so make sure you are selecting the correct Vendor Profile from the “Select Customer” drop-down list. Otherwise, you will not be able to view the PO.

4. **My Account**

- Selecting the “**Account Settings**” option from the dropdown under your name will take you to a screen where you can change your log-in information for the CSP.
- In this screen you can change your Name & your Department, Role and Password.
- Under “**Notification Preferences**” you can choose how you would like to receive each notification (Online, Email or SMS).
- Selecting the “**Log Out**” icon from the dropdown under your name will log you out of the CSP and bring you back to the log-in screen.

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Payments Add-ons

JACK NOTIFICATIONS 74 HELP

Account Settings Notification Preferences Log Out

My Account Settings

Settings

Notification Preferences

Security & Two-Factor Authentication

User Details

* First Name Jack

* Last Name Sadowsky

* Email jsandsusz@gmail.com

Department

Role

Save

Change Password

* Current Password

* Password

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

* Password Confirmation

Save

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

My Account Notification Preferences

Settings

Notification Preferences

Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

Announcements

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

5. Setup / Admin Users

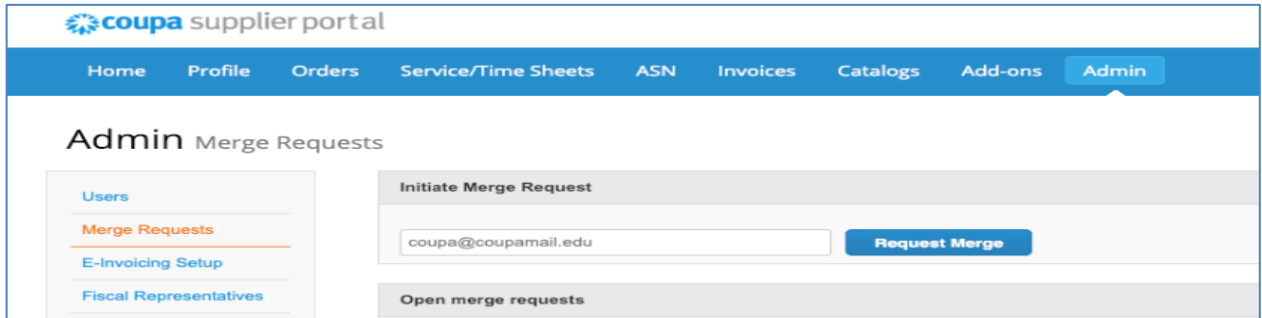
Going to Setup from the Navigation Bar will take you to a screen where you can administer the users, update general company information, enter merge requests with already existing CSP portals for your company and where you can create “Remit To” addresses for the CSP.

- Selecting “Users” will provide functionality to add other users in your company to utilize the CSP. You can set their permissions and the customers they can view. You can also transfer the administrative role to another user in your company.
- Tabs can be removed by selecting “Edit” on each User and deselecting permissions.
- For example, while you may use the “Service/Time Sheets”, “ASN”, “Catalogs” tabs with other customers, MSK will not be using them. Therefore, these tabs (permissions) can be removed.

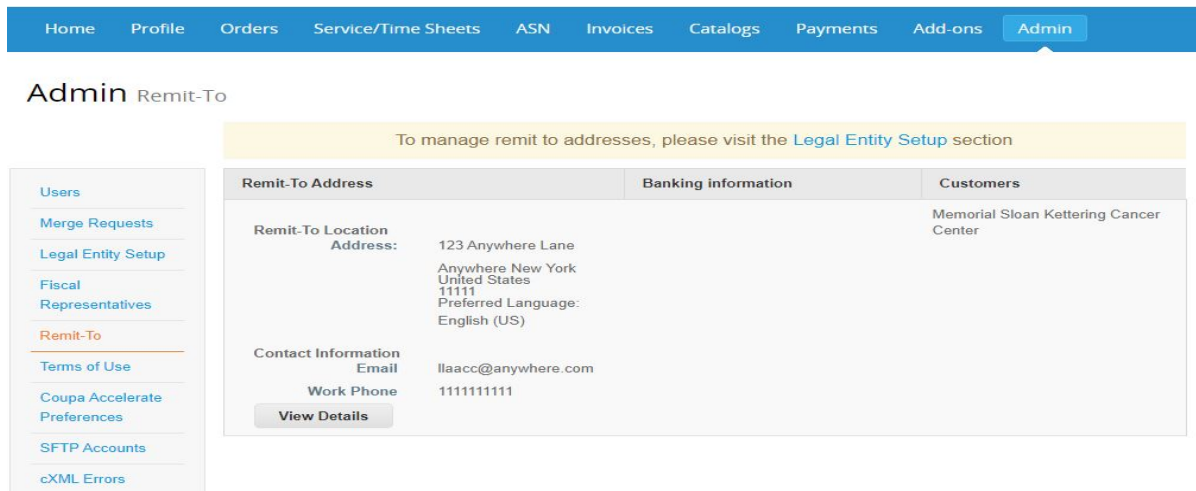
Admin Users

Users	Permissions	Customer Access
Jack Sadowsky MSKcoupatest+013119jms@gmail.com Edit	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	None selected
Jack Sadowsky jsandsusz@gmail.com	ASNs Admin	Memorial Sloan Ketterin INC. (121636-001) M

- Selecting “**Merge Requests**” will allow you to merge with any other CSP profiles from your company. This may happen if you have many divisions and customers using Coupa. Use this feature to keep them all together in the CSP.



- Selecting “**Remit To**” allows you to add or deactivate a legal entity in the CSP. (It does not allow you to edit).



- If you have **multiple supplier entities** and if you have logged in using one supplier entity and need to see data or transact for **another supplier entity**, then click on 1 “Profile” -> 2 “Information Requests” -> 3 “Profile Drop Down” menu and then on the 4 new entity.

