



Coupa Supplier Portal (CSP) Webinar

Agenda

Introduction

Logging in to the Coupa Supplier Portal (CSP)

- Accepting an email invitation

Profile Setup

- Setting up Multi-factor Authentication
- Managing Additional Users
- Managing Notification Settings
- Creating Legal Entities

Submitting Invoices

- Finding Orders
- Creating Invoices from PO

Finding Remittance

- Navigating the Invoices table
- Creating Custom Views

* Estimated total duration: 1.5 hours



1 – Introduction

- What is the Coupa Supplier Portal (CSP)

Implementing Coupa is part of a larger effort to deliver a more integrated source-to-pay platform that will help FirstEnergy better manage supplier spend

By having a centralized, standardized and transparent platform, Supply Chain can make informed buying decisions for FirstEnergy to meet our business needs and better serve our customers. Coupa provides a direct portal for Suppliers to streamline transactions with First Energy.



Dedicated Portal

- Access purchase orders and invoices in one place
- Add in additional users as needed to manage transactions
- Multi-factor authentication helps keep data secure



Reduced Transactional Workload

- Streamline invoicing from purchase orders with minimized data entry
- Visibility into invoice and payment statuses
- Communicate directly with FirstEnergy regarding specific documents



Digitally-Managed Supplier Information

- New suppliers will be able to provide their information through a secure, digital channel.
- Existing suppliers may work with their FirstEnergy contact to update their information



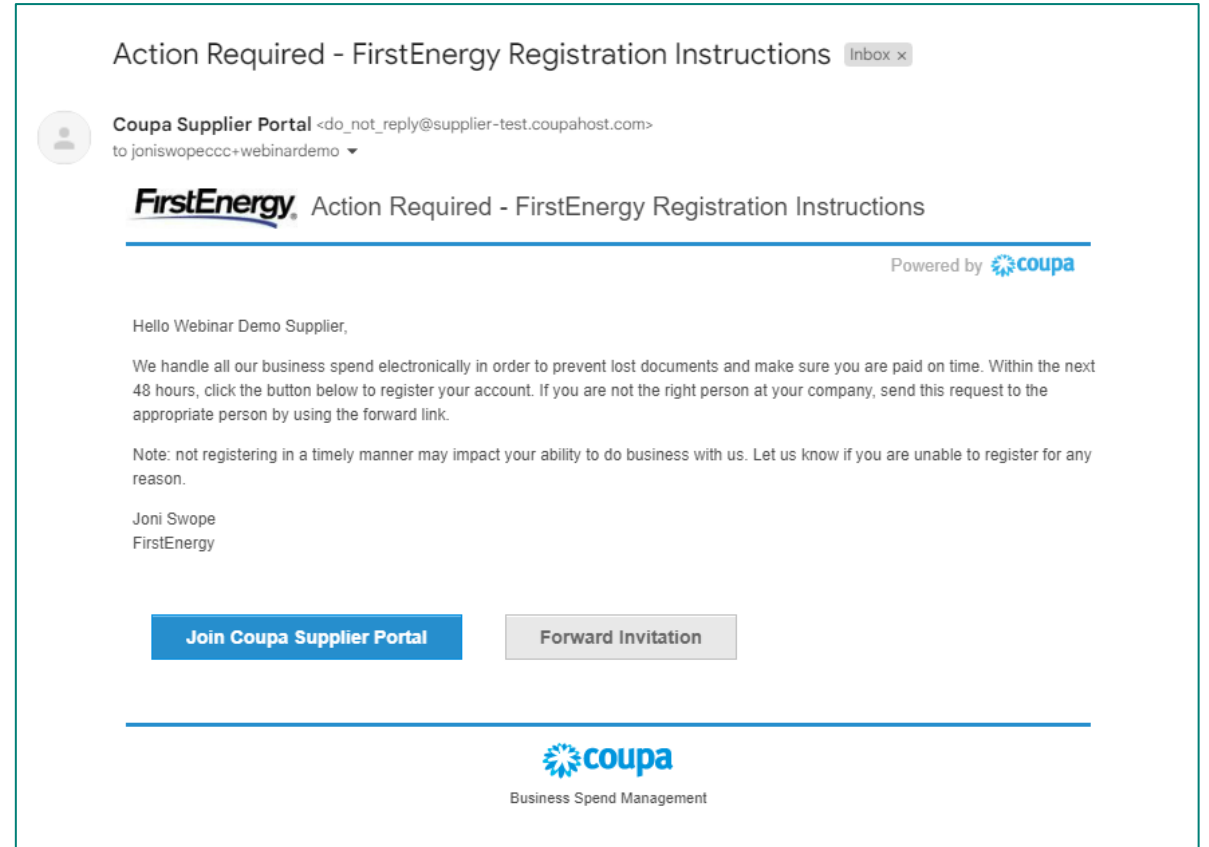
2 - Logging into the Coupa Supplier Portal (CSP)

- Accepting an email invitation

Accepting a Connection Invitation

Suppliers will have received a connection invitation via email.

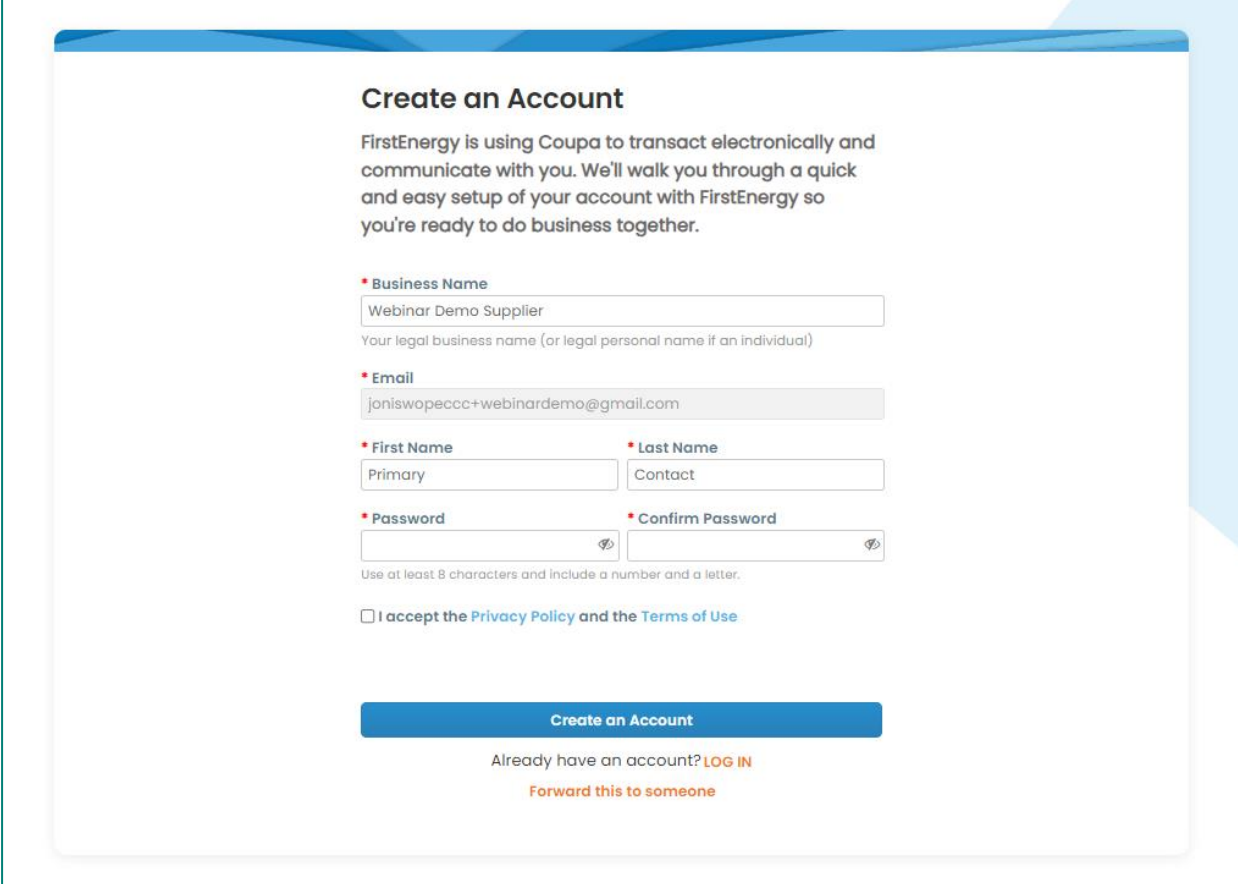
- The invitation email will be sent to the **Primary Contact**.
 - The Primary Contact is considered the Administrator of the Supplier's CSP account and does not have to be the primary business contact.
- Click **Join Coupa Supplier Portal** to continue.
 - *Note: Check your Spam or Junk folders if you have not received an expected invitation.*



Creating an Account

Suppliers without existing accounts will be prompted to create an account. Suppliers with an existing CSP account may Log In instead.

- Suppliers without an existing CSP account will need to complete the required fields to create an account.
 - Required fields are marked with a red asterisk (*).
 - A one-time verification code will be sent to the primary contact's email. Future codes will be provided via multi-factor authentication when needed.
- Suppliers with an existing CSP account will be able to Log In instead.
 - The login email must match the address where the invitation was received.



The screenshot shows a web form titled "Create an Account" for FirstEnergy. The form includes a header with the title and a paragraph explaining that FirstEnergy uses Coupa for electronic transactions. Below this, there are several input fields: "Business Name" (with a red asterisk), "Email", "First Name", "Last Name", "Password", and "Confirm Password" (all with red asterisks). A checkbox for "I accept the Privacy Policy and the Terms of Use" is located below the password fields. At the bottom, there is a blue "Create an Account" button, a link for "Already have an account? LOG IN", and a link for "Forward this to someone".

Create an Account

FirstEnergy is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with FirstEnergy so you're ready to do business together.

* Business Name
Webinar Demo Supplier
Your legal business name (or legal personal name if an individual)

* Email
joniswopeccc+webhardemo@gmail.com

* First Name
Primary

* Last Name
Contact

* Password
[Redacted]

* Confirm Password
[Redacted]

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

I accept the [Privacy Policy](#) and the [Terms of Use](#)

Create an Account

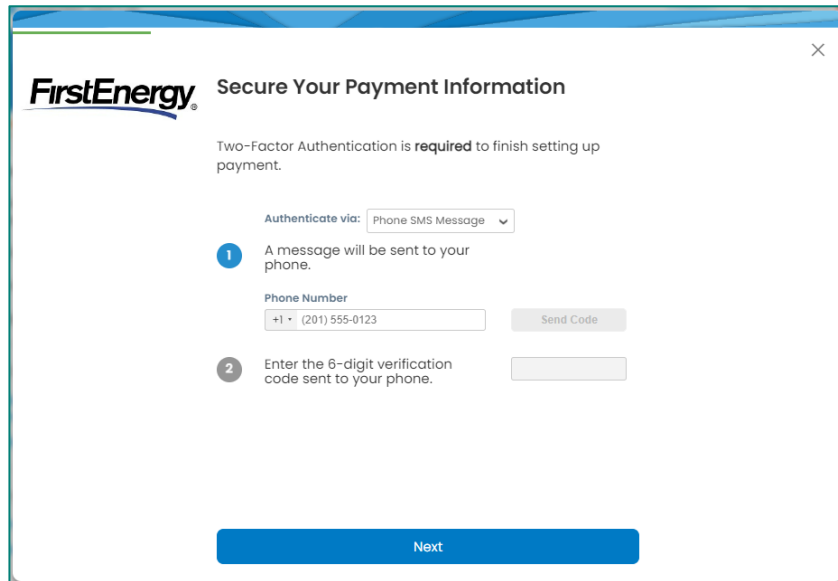
Already have an account? [LOG IN](#)

[Forward this to someone](#)

Home Page and Multi-Factor Authentication

Suppliers will be prompted to setup Multi-Factor Authentication (MFA or 2FA) after the first log-in. After either setting up MFA or exiting the MFA widget, the home page will be displayed.

- Multi-factor authentication will be covered in the next section.
- *Note: Coupa Verification is a paid service and is not required to do business with FirstEnergy.*



FirstEnergy Secure Your Payment Information

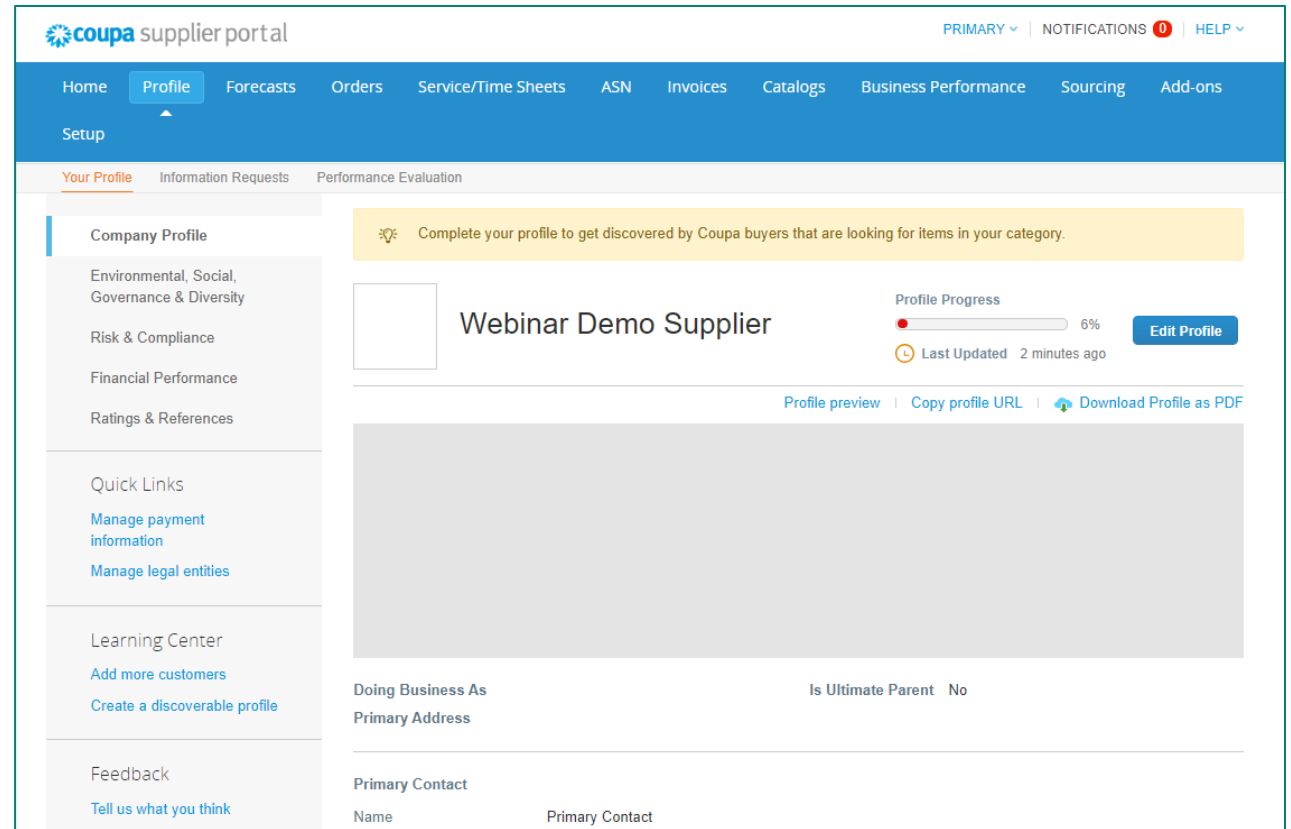
Two-Factor Authentication is **required** to finish setting up payment.

Authenticate via: Phone SMS Message

1 A message will be sent to your phone.

Phone Number: +1 (201) 555-0123

2 Enter the 6-digit verification code sent to your phone.



coupa supplier portal PRIMARY | NOTIFICATIONS 1 | HELP

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

Setup

Your Profile Information Requests Performance Evaluation

Company Profile

Environmental, Social, Governance & Diversity

Risk & Compliance

Financial Performance

Ratings & References

Quick Links

[Manage payment information](#)

[Manage legal entities](#)

Learning Center

[Add more customers](#)

[Create a discoverable profile](#)

Feedback

[Tell us what you think](#)

Complete your profile to get discovered by Coupa buyers that are looking for items in your category.

Webinar Demo Supplier

Profile Progress 6%

Last Updated 2 minutes ago

[Profile preview](#) | [Copy profile URL](#) | [Download Profile as PDF](#)

Doing Business As Is Ultimate Parent No

Primary Address

Primary Contact

Name Primary Contact



3 – Profile Setup

- Setting up Multi-Factor authentication
- Managing Additional Users
- Managing Notification Settings
- Creating Legal Entities

Setting up Multi-Factor Authentication

Multi-Factor Authentication (MFA) is required to manage legal entities and other financial details. Suppliers may choose to use an authentication app or to use SMS – however, the authentication app method is more secure and is the recommended method.

- Suppliers will be prompted to set up MFA as part of their first log-in.
- Suppliers with existing CSP accounts will need to navigate to the Account Settings page instead.
 - Hover over the **Name Menu**
 - Click **Account Settings**
 - Click **Security & Multi Factor Authentication**

The image displays two screenshots of the Coupa Supplier Portal interface. The top screenshot shows the main navigation menu with a red arrow pointing to the 'Account Settings' option in the dropdown menu. The bottom screenshot shows the 'My Account' page with a red arrow pointing to the 'Security & Multi Factor Authentication' section in the left sidebar. The main content area of the bottom screenshot shows the 'Multi Factor Authentication' settings, which are currently disabled. The settings include options to enable MFA for payment changes, login, or both, and specific options for enabling MFA via an authenticator app or SMS.

Setting up Multi-Factor Authentication

Select the desired settings for MFA.

- Enable MFA
 - Minimum requirement: Enable only for Payment Changes
 - More secure: Enable for Both Account Access (Login) and Payment Changes
- Via Authenticator App
 - Most secure
 - Free authenticator apps through Microsoft, Google, etc.
- Via SMS
 - Will send a code through text
 - Often slower to deliver codes than an authenticator app

The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-'. A 'Setup' link is visible below the navigation bar. The main content area is titled 'My Account Security & Multi Factor Authentication'. On the left, a sidebar menu lists 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication' (which is highlighted). The main content area is titled 'Multi Factor Authentication' and contains three sections: 1. 'Multi Factor Authentication' with radio buttons for 'Disabled', 'Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)' (which is selected), and 'Enable for Both Account Access (Login) and Payment Changes'. 2. 'Via Authenticator App Disabled' with an 'Enable' checkbox and the text 'Using an Authenticator App available from your mobile phone app store'. 3. 'Via SMS Disabled' with an 'Enable' checkbox and the text 'Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.'

Setting up MFA – Authentication App

Follow the prompts to complete MFA setup.

- Use the authenticator app to scan the QR code.
- The app will display a 6-digit code. Enter that code in the box.
 - This code is time-sensitive.
- Click **Enable**.

Multi Factor Authentication App

Keep unauthorized users out of your account by using both your password and your phone. Setup your Multi Factor Authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.


- 1 Use your favorite Authenticator App available from your mobile phone app store: Examples are "Google Authenticator" and "Authy"
- 2 Scan this QR code using your mobile device.
- 3 Enter the 6-digit verification code from your device.

Multi Factor Authentication

Download on the App Store

GET IT ON Google Play

Coupa Supplier Portal



JN6DS5IELW7ANB64VAZ
6KLA6WTN27BIQ

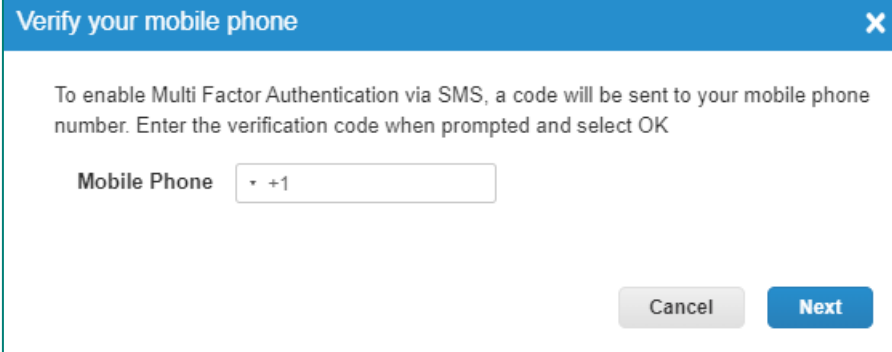
Click to copy Security Key

Cancel Enable

Setting up MFA – SMS

Follow the prompts to complete MFA setup.

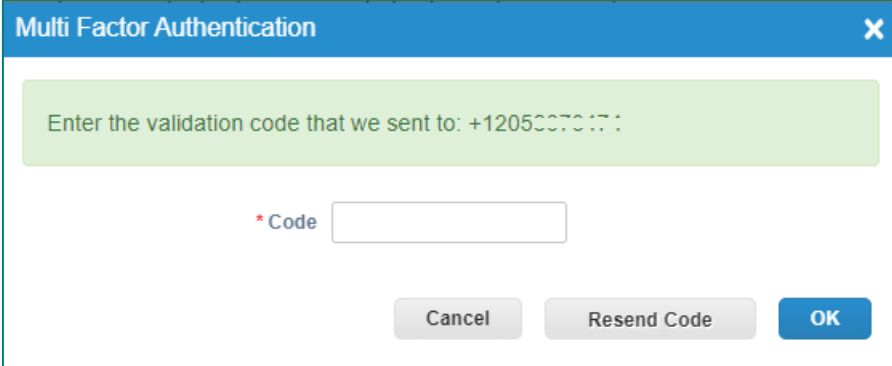
- Enter the desired phone number.
 - This must be a text-enabled phone number.
- Click Next.
- A code will be texted to the provided number.
Enter it on the next pop-up.
- Click **OK**.



Verify your mobile phone ✕

To enable Multi Factor Authentication via SMS, a code will be sent to your mobile phone number. Enter the verification code when prompted and select OK

Mobile Phone



Multi Factor Authentication ✕

Enter the validation code that we sent to: +12053373171

* Code

Setting up MFA – Recovery Codes

Recovery codes are one-time use and allow the user to skip MFA. These are backup codes only, not to be used as the primary verification method.

- Download or copy codes.
- These codes are a *sample only*.

Save Your Backup Codes ✕

These codes were generated on November 30, 2023

Emergency Recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

pyxCMA	hLBrxQ
orBong	yXBltQ
vGzYEQ	166Amg

[Copy](#) [Download](#) [Print](#)

Managing Additional Users

Suppliers are able to add as many users as needed to support transactions with FirstEnergy or other customers using Coupa. The Admin will need to create new accounts and assign permissions to new users.

- The Admin page provides quick links to user management, legal entity setup, and several other management tools.
- Invite New Users
 - Click **Setup**.
 - Click **Users**.
 - Click **Invite User**.
 - Complete required information.

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. A 'Setup' button is highlighted in the navigation bar. Below the navigation bar, there is a sub-menu with 'Admin' and 'Customer Setup'. The 'Admin' section is active, showing a sidebar with various options: Users, Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The 'Users' option is selected, and the 'Invite User' button is highlighted. The main content area shows a table of users with the following data:

User Name	Email	Status	Permissions	Customer Access	Actions
Primary Contact	joniswopeccc+webinardemo@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	FirstEnergy	Edit

At the bottom of the table, there is a pagination control showing 'Per page 5 | 10 | 15'.

Managing Additional Users

Complete the required information.

- First Name, Last Name, and email are required.
- Manage Permissions
 - Only give relevant permissions.
- If the supplier has multiple customers using Coupa, the Admin is able to grant or revoke access to specific customers by checking the box next to the customer's name.
- Finish by clicking **Send Invitation**.
- The invited user will be able to set up their own MFA and manage their own notifications.

The screenshot shows the 'Invite User' form. At the top, there are three input fields for 'First Name', 'Last Name', and 'Email'. Below these are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has a list of checkboxes: 'All', 'Admin', 'Orders', 'Restricted Access to Orders' (with a radio button for 'All'), 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets' (with a radio button for 'All'), 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The 'Customers' section has a list of checkboxes: 'All' and 'FirstEnergy'. At the bottom right, there are two buttons: 'Cancel' and 'Send Invitation'. Red arrows point to the 'Permissions' and 'Customers' sections, and the 'Send Invitation' button.

Managing Notifications

Each user may manage their own notification settings.

- Notifications are managed by each user individually.
 - Hover over the **Name Menu**
 - Click **Account Settings**
 - Click **Notification Preferences**.
- Each type of notification will be listed.
 - Check or uncheck the boxes as needed.
 - Click **Save** at the bottom of the page

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Inv', and 'Log Out'. A dropdown menu is open under 'Inv', showing 'Account Settings', 'Notification Preferences', and 'Log Out'. The main content area is titled 'Webinar Demo Supplier' with a profile progress indicator. The 'My Account' section is active, showing 'Notification Preferences'. A sidebar on the left lists 'Settings', 'Notification Preferences', 'Security & Multi Factor Authentication', and 'Catalogs'. The 'Notification Preferences' section includes contact information (Email: joniswopeccc+webinarde, Mobile(SM): +1 202 301 1111) and a 'Verified' status. Below this, the 'Account Access' section contains a table of notification preferences:

Notification Type	Online	Email	SMS
Request to Join	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Merge Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The 'Announcements' section shows 'New Customer Announcement' with 'Online' checked and 'Email' and 'SMS' unchecked. The 'Business Performance' section shows 'Business Performance Role Granted' with 'Online' checked and 'Email' and 'SMS' unchecked.

Creating Legal Entities

Legal Entities are used to manage payment information and may have one or more Remit-To address and/or Ship From address attached. Legal entity details will automatically populate on invoices once created.

- Legal Entities are best managed through the Setup page.
- Use the Quick Links to access the Legal Entities table.
 - Suppliers may be prompted to enter the MFA code from either the app or SMS.
- Click **Add Legal Entity**

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is visible on the left, and 'PRIMARY', 'NOTIFICATIONS 0', and 'HELP' are on the right. A blue navigation bar contains links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. Below this, a secondary bar shows Sourcing, Add-ons, and Setup (highlighted with a red arrow). The main content area is titled 'Admin Customer Setup' and 'Admin Legal Entity Setup'. A sidebar on the left lists various administrative options: Users, Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup (highlighted with a red arrow), Fiscal Representatives, Remit-To, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main content area features a large 'Add Legal Entity' button (highlighted with a red arrow) and a message: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity.' Below this, a note states: 'Please note, if you are a European Company, or have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-Invoicing Setup to continue.'

Creating Legal Entities

Follow the prompts to complete legal entity setup.

- Legal entity name must be the full legal business name, not the DBA (doing business as) name.
- Select Country/Region where the business is registered.
- Click **Continue**

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/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Creating Legal Entities

Follow the prompts to complete legal entity setup.

Note: Every blue “i” icon will display a hint or help text.

- Select which customers should have access to this legal entity.
- Complete the Invoice-From address.
- Provide the Tax ID number(s).
- An Invoice From Code is not required.
- Click **Save & Continue**

Tell your customers about your organization

Which customers do you want to see this?

All

FirstEnergy

What address do you invoice from?

* Address Line 1

* City

State

* Postal Code

Country/Region United States

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

Creating Legal Entities

Follow the prompts to complete legal entity setup.

Note: Every blue “i” icon will display a hint or help text.

- Select **Bank Account** from the drop-down menu.
- Complete the required information.
 - SWIFT/BIC code is required by Coupa and can be found on bank documents or by calling your bank.
- Optional – provide a Remit-To Contact
- Click **Save & Continue**

Where do you want to receive payment?

1 2 3 4

• Payment Type: Bank Account

What are your Bank Account Details?

Bank Account: United States
Country/Region:

State: Select an Option

Bank Account Currency: USD

Beneficiary Name: Webinar Demo Supplier

Bank Name:

Account Number: ⓘ

Confirm Account Number:

ACH Routing Number: ⓘ

Wire Routing Number: ⓘ

SWIFT/BIC Code: ⓘ

My bank does not have a BIC code

Branch Code:

Bank Account Type: Business

Supporting Documents: Choose Files No file chosen ⓘ

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

What is your Remit-To Address?

Address Line 1: 1212 Havana Street
City: Denver
State: CO
Postal Code: 80012
Country/Region: United States

Cancel Save & Continue

Creating Legal Entities

Follow the prompts to complete legal entity setup.

Note: Every blue “i” icon will display a hint or help text.

- Provide additional Remit-To addresses as required by clicking **Add Remit-To**.
- If the information is complete, click **Next**.

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	
Bank Account Wells Fargo Webinar Demo Supplier *****9789 121042882 121042882	1212 Havana Street Denver CO 80012 United States	Active	Manage

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

Creating Legal Entities

Follow the prompts to complete legal entity setup.

Note: Every blue “i” icon will display a hint or help text.

- Provide additional Ship From addresses as required by clicking **Add Ship From**.
- If the information is complete, click **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	
1212 Havana Street Denver CO 80012 United States	Active	Manage

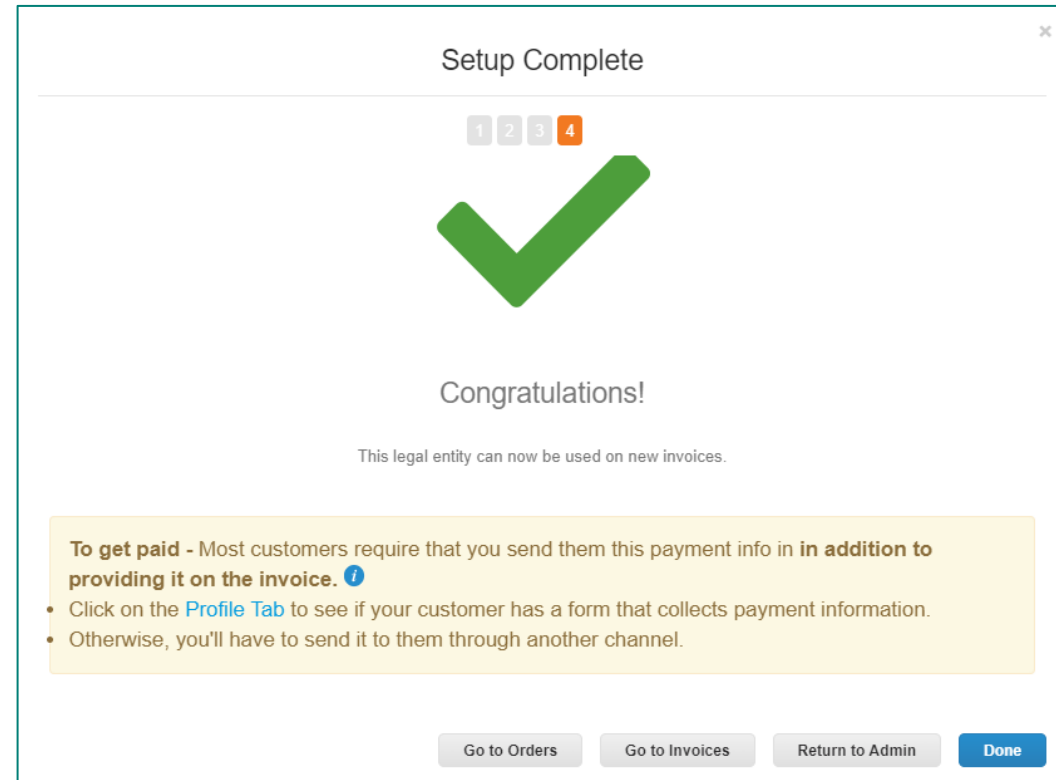
Deactivate Legal Entity **Done**

Creating Legal Entities

Follow the prompts to complete legal entity setup.

Note: Every blue “i” icon will display a hint or help text.

- Once complete, you will see a confirmation page.
- **Go to Orders** – navigates to Orders page
- **Go to Invoices** – navigates to Invoices page
- **Return to Admin** – navigates to Admin page
- **Done** – goes to the home page





4 – Submitting Invoices

- Finding Orders
- Creating Invoices from POs

Finding Orders

The Orders tab will contain all purchase orders issued to the supplier. Orders will also be emailed to contacts whose notifications are active.



- Toggle between customers using the **Select Customer** drop-down.
- Find Orders in different statuses by changing the **View**
- Use the **Search** to find specific Orders
- Create an invoice against a given Order by clicking the yellow coins.



- Create a credit note against a given Order by clicking the red coins.




The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders' (highlighted with a red arrow), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a secondary navigation bar with 'Orders' (highlighted), 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', 'Promised Deliveries', and 'Shipments'. A 'Select Customer' dropdown menu is set to 'FirstEnergy' (indicated by a red arrow). The main content area is titled 'Purchase Orders' and includes instructions from the customer. At the bottom, there is a table of purchase orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. A red arrow points to the 'View' button above the table.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
750021603	11/30/23	Issued	None	Supplier Webinar Service Demo	No	15,000.00		 

Creating Invoices against Orders


Clicking the yellow coins () will open a draft invoice against a given Order, whose details will be prepopulated along with the legal entity information.

- Complete the required fields marked with a red asterisk (*)
- Upload a copy of the invoice under **Image Scan**
- Only one attachment may be added under the **Attachments** section.
 - Combine all documents into one PDF before uploading.
- If more than one legal entity, Remit-To address, or Ship From address is available, select the appropriate data by clicking the magnifying glass icon 
- Account Number is required for Fleet M5 invoices.
- Period Start and End Dates are required for service invoices.

Create Invoice Create

General Info

* Invoice #

* Invoice Date 

Payment Term 0100|within 30 days Due net

* Currency USD

Status Draft

* Image Scan No file chosen


Supplier Note


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

From

* Supplier Webinar Demo Supplier

Supplier Tax ID

* Invoice From Address Webinar Demo Supplier 
1212 Havana Street
Denver, CO 80012
United States


* Remit-To Address Webinar Demo Supplier 
1212 Havana Street
Denver, CO 80012
United States

Bank Name: Wells Fargo

Beneficiary Name: Webinar Demo Supplier

Bank Account Number: *****9789


Routing Number: *****2882


* Ship From Address Webinar Demo Supplier 
1212 Havana Street
Denver, CO 80012
United States

To

Customer FirstEnergy

Account Number for Invoice
Required for Fleet M5 Invoices

Period Start Date 
Required for Services invoices.

Period End Date 
Required for Services invoices.

Creating Invoices against Orders

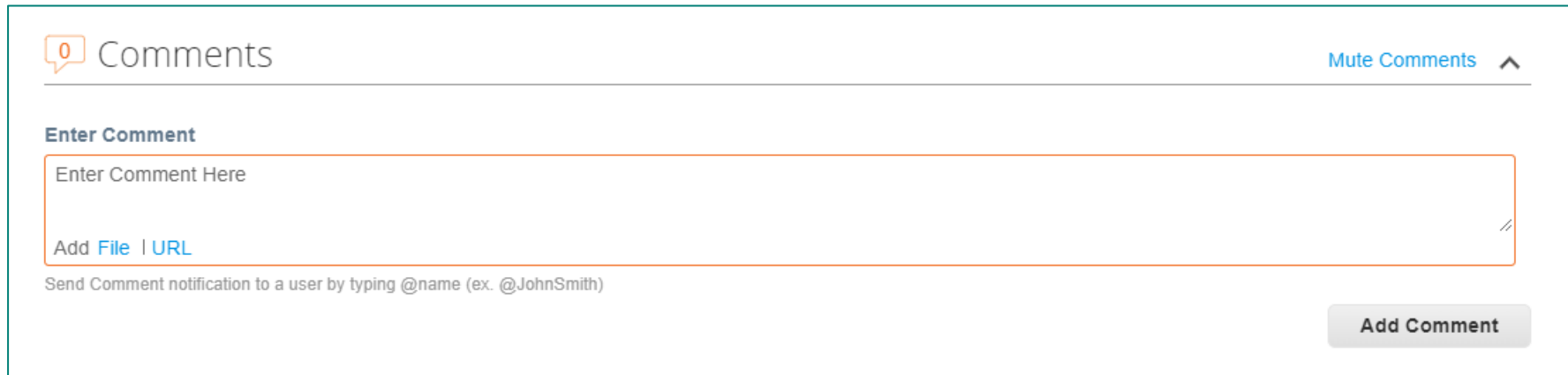
Additional details are able to be updated at the line and summary levels.

- Complete the required fields marked with a red asterisk (*)
- Lines with type (🏠) are service lines. You may edit the price of the line to reflect the services charged.
 - Note: suppliers who provide goods only are set up as ERS (Evaluated Receipt Settlement), and invoices will be automatically generated on behalf of the supplier.
- Otherwise, update the quantity delivered in order to update the price.
- Please include serial numbers, part numbers, etc, as appropriate.
- Include Shipping, Misc, and Tax charges as appropriate.
- Click **Calculate** to update the Total Tax, Net Total, and Total.
- When finished and sure the information is correct, click **Submit**.

The screenshot displays the SAP 'Lines' interface. At the top, the title 'Lines' is shown with a 'Line Level Taxation' checkbox. The main table has columns for Type, Description, Price, and a total price of 15,000.00. The line is a service line (🏠) with a description of 'Supplier Webinar Servii'. Below the table, there are several fields: PO Line (750021603-1), Service/Time Sheet Line (None), Contract (dropdown), Supplier Part Number (input), SAP Taxable Flag (Service Purchasing (Input) - Tax Exempt), SAP PO Number (None), ERS Indicator (Yes), Serial Number(s) (input), SAP PO Classification (Standard), and Billing (560200-AO-101622884-SC00-503207--3). At the bottom, there are buttons for '+ Add Line', '+ Pick lines from PO', '+ Pick lines from Contract', and a 'Totals & Taxes' section. The 'Totals & Taxes' section shows: Lines Net Total (15,000.00), Shipping (input), Misc (input), Tax (dropdown, 0.000 %, 0.000), Total Tax (0.00), Net Total (15,000.00), and Total (15,000.00). At the very bottom, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit.

Communicating with FirstEnergy via Comments

Each object (invoice or order) in Coupa will have a comment section that can be used to communicate with FirstEnergy about topics specific to that object.



The screenshot shows a 'Comments' section in a web application. At the top left, there is a speech bubble icon with the number '0' and the word 'Comments'. At the top right, there is a 'Mute Comments' link with an upward-pointing arrow. Below this is a section titled 'Enter Comment'. It contains a large text input field with the placeholder text 'Enter Comment Here'. Below the input field, there is a link that says 'Add File | URL'. Underneath that, there is a smaller line of text: 'Send Comment notification to a user by typing @name (ex. @JohnSmith)'. At the bottom right of the comment section, there is a grey button labeled 'Add Comment'.

- Enter a comment in the comment box. The **Add Comment** box be clickable once text is entered.
- Tag specific contacts at FirstEnergy (or within your organization) using the @ feature.
- Add files and URLs as needed to support additional documentation.



5 – Finding Remittance

- Locating Payment Information
- Creating Custom Views

Finding Payment Information

Coupa provides payment information for paid invoices on the Invoices table.

- Click **Invoices**
- Change the View to **Payment Information**
- Use the **Search** to find specific payment details, displayed in the **Payment Information** column
- Click the blue invoice number to view payment information in detail.

coupa supplier portal

MICHAEL | NOTIFICATIONS 6 | HELP

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

Setup

Invoices Invoices Lines Payment Receipts Advanced

Select Customer FirstEnergy

Invoices

Instructions From Customer

IMPORTANT: If you are delivering quantity-based goods (i.e. Qty and Unit are populated) and the PO line is marked as ERS, please do NOT submit invoices to us as they will be auto-disputed. You will be paid for these POs per your payment terms upon confirmation of receipt of good delivery

POs with terms other than pay immediately will be processed on the 10th, 20th, and the last business day of the month. If the 10th or 20th fall on a weekend, the payments will be made the following business day.

Direct Payment Permit Numbers authorizing purchase of tangible personal property without payment of the tax at the time of purchase have been issued by various states to FirstEnergy Companies. Additionally, certain FirstEnergy Companies' purchases are tax exempt. Direct Pay Permit numbers may be requested from the FirstEnergy Buyer. If you believe this Purchase is not covered by a Direct Pay permit or tax exemption, please tag the FirstEnergy Buyer in the comments with inquiry.

Create Invoices *i*

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

Export to View Payment Information Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
Yes	750009035	666666666666	Approved	12/22/22	0199 ASAP - 2% 10 Days - 45 Net	06/21/23	Payment# Amount = Gross Total + Tax - Discount on 07/07/23 for USD 7,520.00
No	750021177	None	Draft	10/18/23	0199 ASAP - 2% 10 Days - 45 Net	10/18/23	

Finding Payment Information

Payment details will be listed at the bottom of the invoice.

Comments

Mute Comments ^

Enter Comment

Add File | URL

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

Add Comment

Payments

Status Externally Paid

Paid-in-Full Date 07/07/23

Payment Notes 666666666666

Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted	07/07/23	Payment	Amount = Gross Total + Tax - Discount	7,520.00
Total Reconciled				7,520.00
Invoice Total				7,520.00
Remaining Balance				0.00

Creating Custom Views

Coupa provides several standard views on each tab (Orders, Invoices, etc.). Users may also create their own views as needed. Any view may be downloaded for offline use in Excel. This example creates a recommended view: **Invoices by Month**

- Choose from standard views by clicking the dropdown next to **View**
- Export data by clicking **Export to** and choosing a format
- To begin creating a custom view
 - Click the dropdown next to **View**
 - Choose **Create View**
 - A new page will open

The screenshot displays the 'Create Invoices' interface. At the top, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below these is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered, Reason, and Actions. The table contains two rows: 'Testing CC 209' (11/30/23, Pending Approval, 750021603, 15,000.00, No) and 'None' (11/30/23, Draft, 750021603, 15,000.00, No). A 'View' dropdown menu is open, showing options: All, Abandoned, Approved, Credit Notes, Disputed, Disputes with a supplier response, Disputes without supplier response, Draft, Overdue invoices, Payment Information, Pending Approval, Processing, Unpaid invoices, Voided, and Create View. The 'Export to' dropdown menu is also open, showing options: CSV plain (current columns), CSV for Excel (current columns), Excel (current columns), and Legal Invoice (zip). The page footer indicates 'Per page 15 | 45 | 90'.

Creating Custom Views

- Choose a name for the view.
 - This view is called Paid Invoices This Month.
- Visibility can be set to be either private or shared among the users within the same organization.
- Choose a default view to start from.
- Conditions will narrow the results displayed.
 - Add or remove conditions using the plus (+) and X (✕) buttons.
 - Add groups of conditions to increase specificity.
 - This example uses **Created Date** equal to **this month** and **Paid** is **Yes**.

General

Name Paid Invoices This Month

Visibility Only Me
 Everyone

Start with view All

Created By Primary Contact

Conditions

Match Conditions Match all conditions Add group of conditions

Filter By Created Date **Filter Clause** this month + ✕

and **Filter By** Paid **is** Yes + ✕

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.
You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the

Creating Custom Views

- Each column will have attributes listed that are specific to the type of view to be created (invoices, purchase orders, etc.).
 - The left column will have any available attributes not currently displayed.
 - The right column lists attributes to be displayed.
 - Click and drag attributes from left to right to display them in the finished custom view.
 - The attributes listed top to bottom will be displayed left to right.
 - This example added **Paid** and **Created Date** to the list of attributes to be displayed.
- Choose the default sort order.
- Click **Save** at the bottom of the page to save the custom view.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.

You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns

Account Number for Invoice
Commented
Comments
Date Of Supply
Date Of Supply
Delivery Number
Disputed Date
Document Type

Selected Columns

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

Default Sort Order

Sort by in ascending order.

Cancel