

**coupa**

A simple & innovative  
buying experience

**Coupa Supplier Portal guidelines**

**2025**

# AGENDA



## CSP Guidelines

<b>0</b>	<b>PMI Coupa</b>
1	Coupa Supplier Portal Overview
2	Registration and Set-Up
3	Purchase Orders
4	Invoices
5	Catalogues
6	Admin
7	Q&A



**One of the main questions** asked by suppliers is “When will I get paid?”

What follows is a long exchange between you and PMI

- Which invoice are you talking about?
- When did you send it?
- How did you send it?
- I haven't received it!
- I found it but there is information missing on it, so I can't pay it!
- ...

Not just frustrating but also expensive for both parties!!

With Coupa these conversations will be a thing of the past.



## In a nutshell, Coupa:

Enables Suppliers to create legally compliant electronic invoices in their country of origin.

- Coupa reviews and implements an invoice under all applicable laws, going far beyond just tax related requirements.

Uses best effort to deliver high quality data, taking structured data directly from the source instead of utilizing other sources (e.g. paper scanning).

- Guaranteed delivery of invoices.
- Better visibility and increased straight-through processing.
- Fewer exceptions, fewer calls/email exchanges, certainly to be paid on time.
- Easier audits, better transparency.
- Coupa invoice channels are clearly defined so everyone knows their duties.



## You are the most important part of PMI e-invoicing enablement!

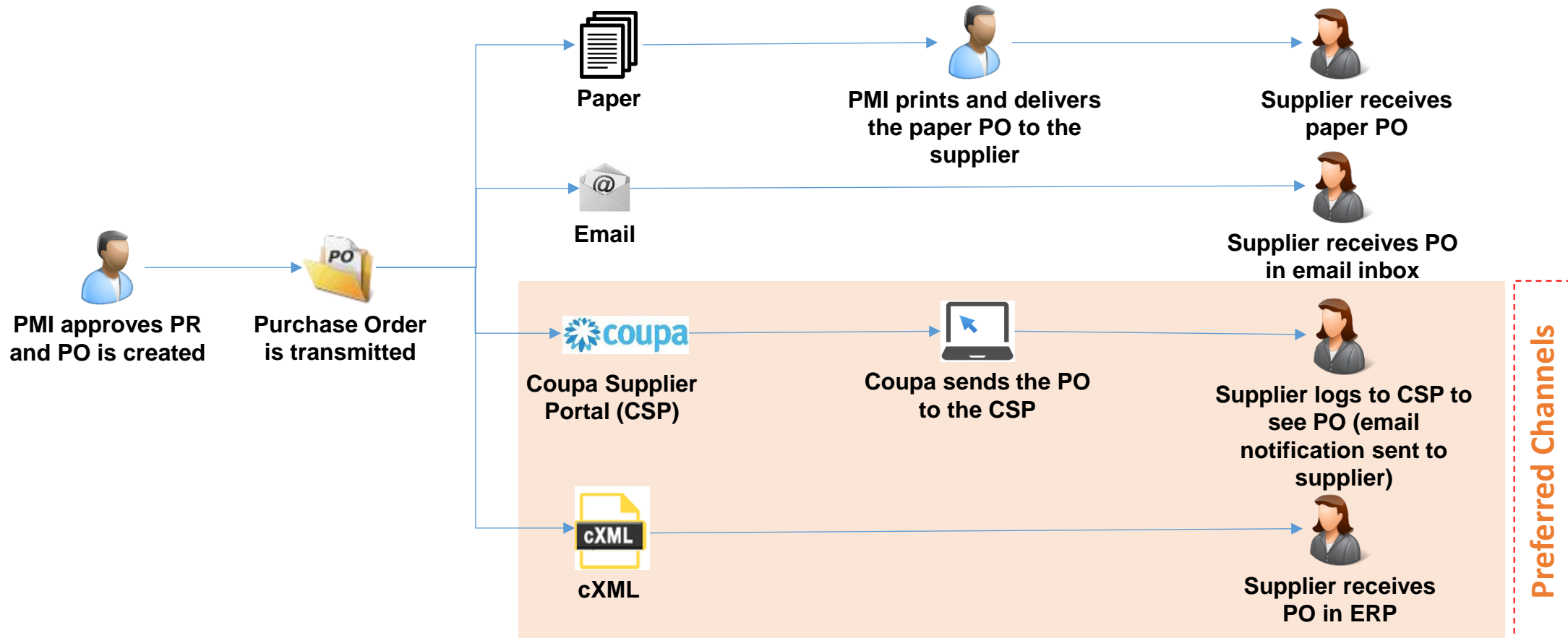
Your participation is key of PMI e-invoicing enablement success

- You will get support with requirements deriving from electronic processing if needed
- Coupa lifts suppliers globally to new levels of legal and commercial compliance
- Coupa can enable you by:
  - Pushing legally required data fields per country (Tax and Commercial Laws)
  - Applying population rules to ensure presence of data (Line descriptions, VAT IDs and other PMI mandatory fields)
  - Applying validation rules to check accuracy of data where possible
  - Allowing you to immediately correct invoice data in case of errors
  - Using state of the art digital signatures according to locally applicable laws
  - Coupa saves all legal and compliant electronic invoices on the Coupa Supplier Portal, where suppliers can access and download them

# TRANSMISSION METHODS



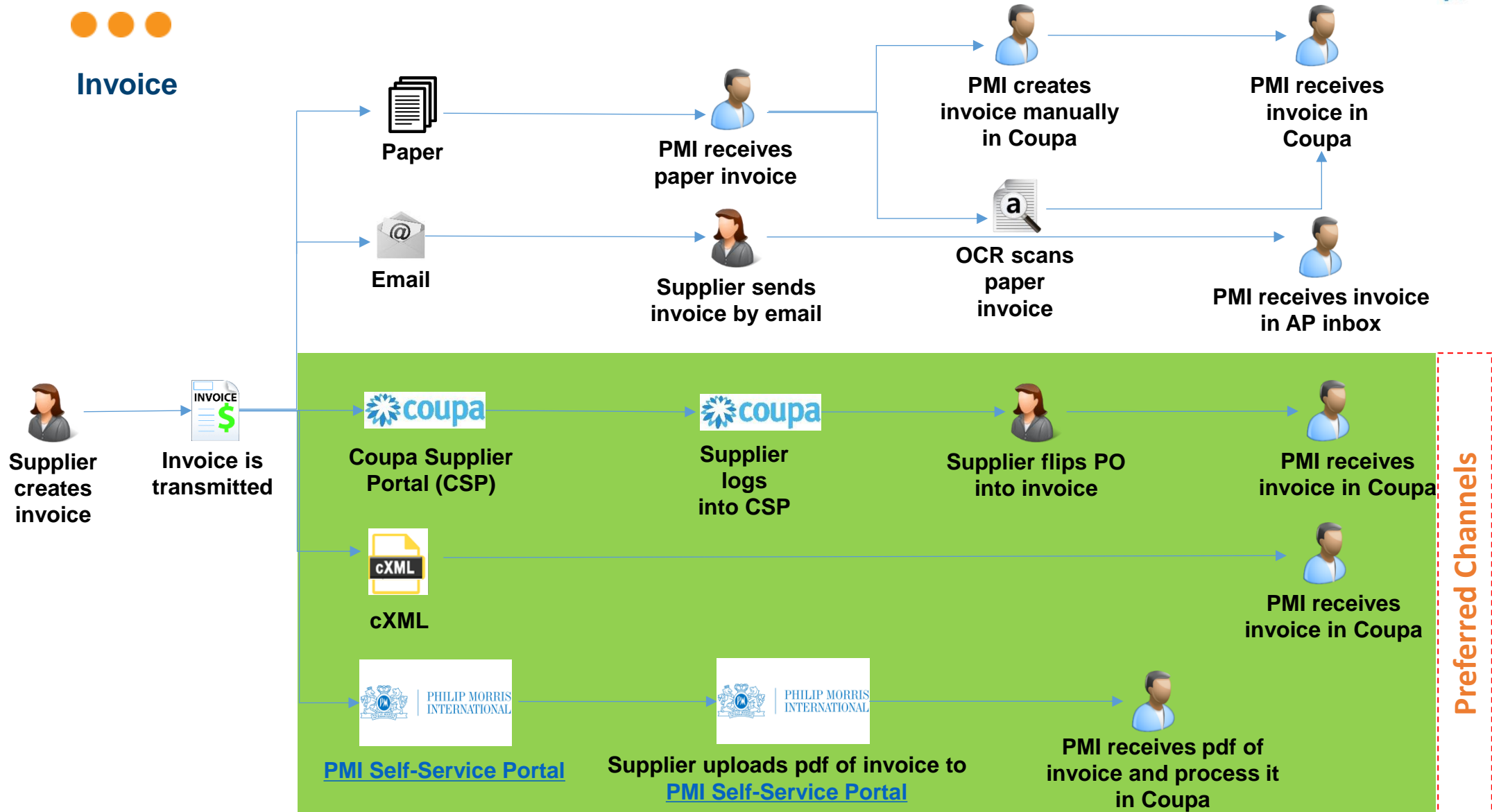
## Purchase Order



# TRANSMISSION METHODS



## Invoice



Preferred Channels

# AGENDA



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# COUPA SUPPLIER PORTAL OVERVIEW



- The Coupa Supplier Portal (CSP) is a **FREE** tool for suppliers to easily do business with PMI and other customers who use Coupa.
- Access through any web browser (i.e. Internet Explorer, Chrome, Safari).
- **Main Benefits:** Allows suppliers to manage customers and transactions in a more efficient and easy way, reducing mistakes and delays.
- In the CSP, you as a supplier, will be able to:
  - Receive and review Purchase Orders
  - Send Invoices and Credit Notes
  - Create and Manage catalog items
  - Manage your Company Business Profile
  - Work collaboratively on the platform
- ⚠️ ▪ Suppliers must provide **only one** e-mail address for the creation of the CSP account.
- To register, suppliers will receive an invitation e-mail from PMI.

# COUPA SUPPLIER PORTAL OVERVIEW



## CSP Benefits

### PROCESS AS-IS:

- PO received via e-mail in PDF format
- Invoices sent via e-mail in PDF format or as paper invoice

#### Pros:

- Process known and mastered

#### Cons:

- Complexity to track documents and changes
- Not all documents can be found in the same place
- Changes in documents are not recorded in the document itself

### PROCESS TO-BE:

- PO received in the Coupa Supplier Portal and in the e-mail
- Invoices sent via the Coupa Supplier Portal

#### Pros:

- All documents, POs and Invoices, are in the same place
- Easy to track documents and status
- Once the invoice is paid, payment date is available under Payment section of the Invoice
- Changes to orders or invoices are recorded in CSP and notifications sent via email
- Orders are received in CSP and by email
- Generation of a Legally Compliant e-Invoice

#### Cons:

- Manual input of Invoice information

# AGENDA



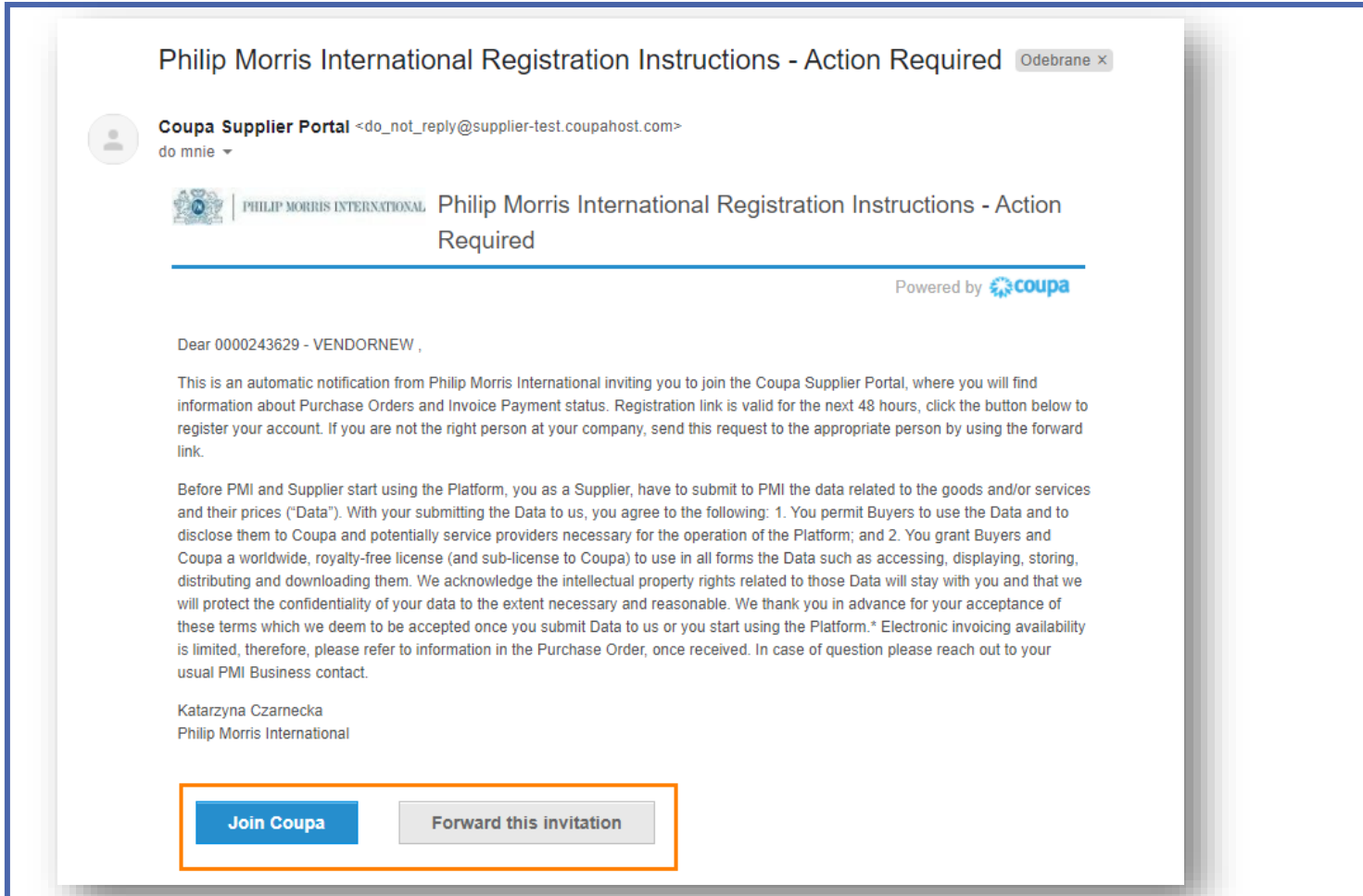
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# REGISTRATION AND SET-UP



## Invitation e-mail



In order to register and connect your company to PMI via the CSP, you will receive an e-mail from PMI inviting you to register and join the CSP

This e-mail includes the legal consent that you accept when accepting the invitation

1. **Click on “Join Coupa” button** in the e-mail to be directed to the Coupa Supplier Portal registration page
2. If you are not the right person to register, you can forward the invitation to your coworker by **clicking on “Forward this invitation” button.**
3. **Sender of invitation:**  
do\_not\_reply@supplier.coupahost.com

# Choose your language!



Suggestions

Duplicates

Customers

Dansk (Danmark)

Deutsch (Belgien)

Deutsch (Deutschland)

Deutsch (Luxemburg)

Deutsch (Schweiz)

Deutsch (Österreich)

English (Australia)

English (Canada)



English (US)

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[Privacy Policy](#) - [Terms of Use](#)

1. On every page of Coupa Supplier Portal, by scrolling it down to the bottom, you may find the language button.
2. Hover your mouse over the button and choose your language from drop down list.

# REGISTRATION AND SET-UP



## Setting up the account

### Create an Account

Grow your Business on Coupa with a Free Account

**1** \* Business Name  
Your legal business name (or legal personal name if an individual)

**2** \* Email

**3** \* First Name \* Last Name

\* Password \* Confirmed  
Use at least 8 characters and include a number and a letter.

\* Country/Region \* Tax Registration ⓘ  
#####

I do not have a Tax ID

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

**5** [Create an Account](#)

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

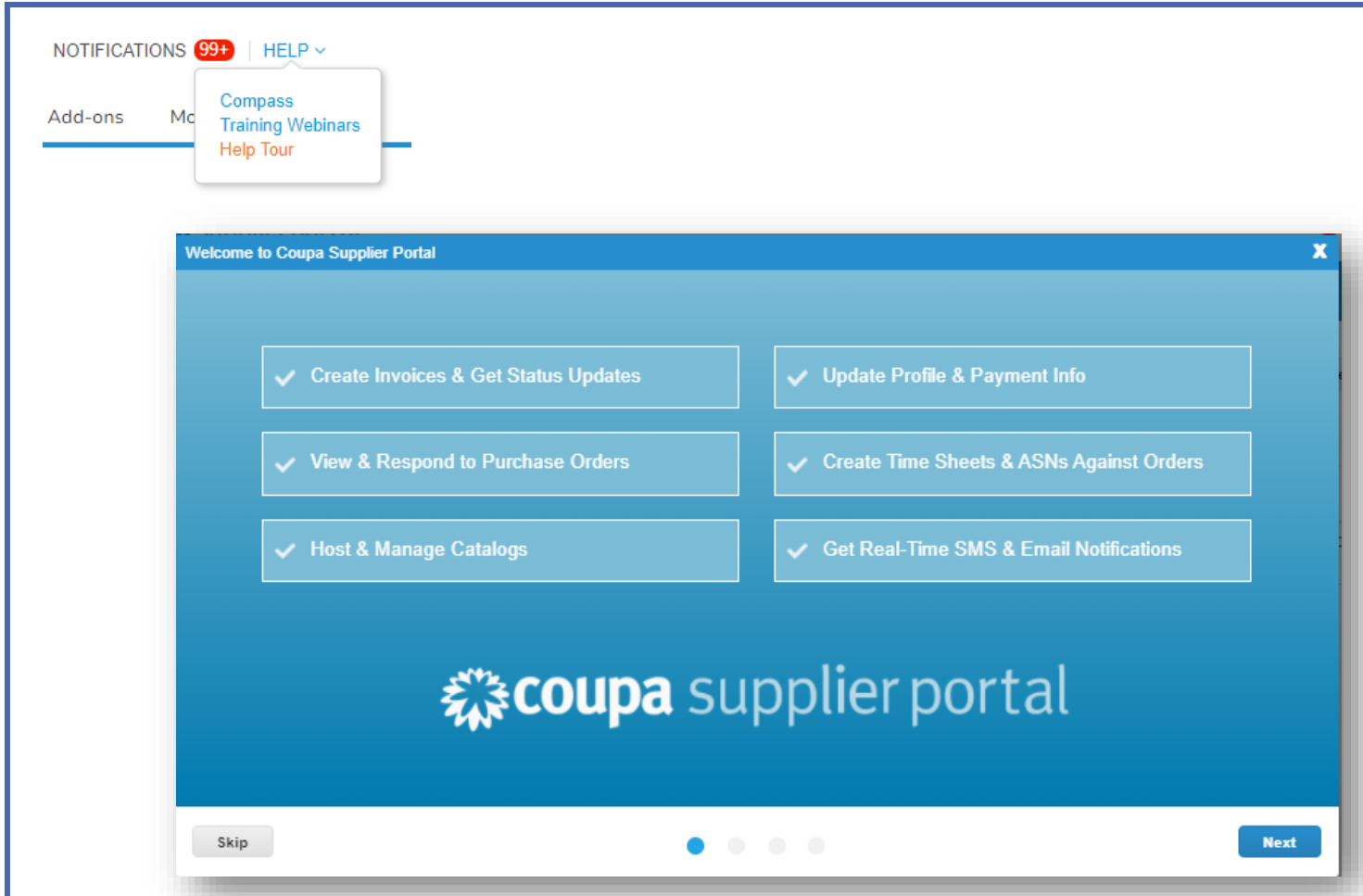
Once you have confirmed your e-mail address in the previous step, you will be asked to provide basic company information:

- 1. Populate** Business Name field with a legal name of your Company for invoicing – this name will appear in the invoices you send to PMI or other customers
- 2. Set** the e-mail address
- 3. Enter** the First and Last name of the owner of the CSP account. More users may be added to the same Company account later
- 4.** As your company joins the Coupa platform, a responsible person needs to **accept Coupa's Terms of Use**. Tick the Checkbox to accept Coupa's Terms of Use and Privacy Policy. Click on [Privacy Policy](#) and [Terms of Use](#) to access the details
- 5. Click** the **Create an Account** to finish

# REGISTRATION AND SET-UP



## The Web Portal



Once your account is created, you will reach the CSP homepage.

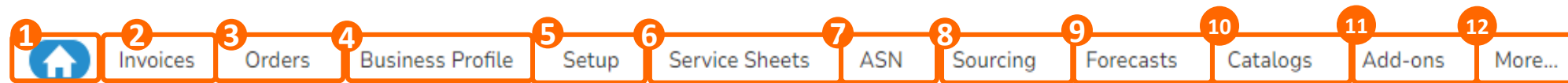
Coupa offers an online Help tour. We recommend you take the tour to get familiar with the CSP features.

1. **Hover Help** section and click **Help Tour** option to proceed with a tour of the CSP.

# REGISTRATION AND SET-UP



## The Web Portal



The Coupa Supplier Portal is a user-friendly web solution. All commands can be found under the main menu at the top right corner of the screen

1. **Click** the Home button to access the Home page of the CSP
2. **Click** the Invoices button to access the Invoices section and see all Invoices created and sent (Credit Notes included)
3. **Click** the Orders button to access to Order section and see all POs received
4. **Click** the Business Profile button to access business profile and legal entities
5. **Click** the Setup to access Admin features (eg. Payment Methods, Users invitations). Available only for users with Admin rights.
6. **Service Sheets** are out of scope for PMI suppliers.
7. **Click** the ASN button to access the Advanced Shipping Notice
8. **Click** the Sourcing to check public sourcing events created by your customer(s) and all the other customers that use Coupa. **Out of scope** for PMI suppliers.
9. **Click** the Forecasts to use Forecast Collaboration to help make better-informed supply decisions that estimate the total sales and revenue for a future period of time. **Out of scope** for PMI suppliers.
10. **Click** the Catalogs button to access the catalogue section and manage customer catalogues. **Out of scope** for PMI suppliers.
11. **Click** the Add-ons to check value-creating product or service that you can begin to use or express interest in using, for example, Coupa Advantage or Early Payment Discounts
12. **Click** More to check the Business Performance for summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.



# REGISTRATION AND SET-UP



## Add Your Legal Entity

coupa supplier portal

Home Invoices Orders **Business Profile** Setup Service Sheets ASN Sourcing Forecasts

Business Profile Legal Entities Information Requests Performance Evaluation

### Legal Entities

1 Create

2 Create Legal Entity

\* Legal Entity Name: vendor

\* Country/Region: Switzerland

1. **Go** to Business Profile tab, Legal Entities Subtab and **click** on Create button.
2. **Complete** legal entity name and country of your company: this is the official name of your business that is registered with your local government and the country where it is located.
3. Once you have completed the Legal Entity Name and Country/Region, a new section will pop up.

# REGISTRATION AND SET-UP



## Add Your Legal Entity

**Create Legal Entity** ×

\* Legal Entity Name  \* Country/Region

**1** **Tax Registrations**

\* Country/Region  VAT ID

**2**  I don't have a Tax ID Number

\* Local Tax ID

**3** [+ Add Tax Registration](#)

Once you have filled Legal Entity Name and Country/Region, Tax Registration will pop up:

- 1. Select** your tax country and provide respective VAT ID.
- In case VAT ID is not available, **check** the box and Local Tax ID will pop up, in which you can provide a local tax number or local registration number for tax purposes.
- 3. Click** to include multiple TAX ID's.

# REGISTRATION AND SET-UP



## Add Your Legal Entity

**1 Invoice From Address**  
Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region	* Address Line 1	Address Line 2
Switzerland	Sädlenweg	
* City	* State	* Postal Code
Zürich	ZH	8055
Invoice From Code ⓘ	Preferred Language	
	German (Switzerland)	

**2 Ship From Address**  
Please enter the physical address that your goods are shipped from? This can be a warehouse address.

Same as Invoice From Address

The system will direct you to complete your company's invoicing information, which is required to proceed with the CSP functionality.

- 1. Provide** your company's invoicing address. Ensure to complete all mandatory address lines
- 2. Tick or Untick** the checkboxes as required: Uncheck if the shipping address is different than invoicing one or your company has more than one shipping from location.

# REGISTRATION AND SET-UP



## Add Payment Method

The screenshot shows the Coupa Admin interface. The top navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below this, the 'Admin' subtab is active, with 'Customer Setup' and 'Connection Requests' options. The main content area is titled 'Admin Remit-To' and features a sidebar with various options like 'Users', 'Merge Requests', 'Merge Suggestions', 'Requests to Join', 'Fiscal Representatives', 'Payment Methods', 'Additional CaaS Information', 'sFTP Accounts', 'cXML Errors', 'sFTP File Errors (to Customers)', and 'sFTP File Status (from Customers)'. The 'Payment Methods' section is highlighted. A blue button labeled 'Add Payment Method' is circled with an orange box and a '1'. Below it is a table with columns: 'Payment Method Name', 'Remit-To Address', 'Payment Type', 'Legal Entity', 'Customer Sharing Status', and 'Actions'. The table contains three rows of data. The 'Actions' column for each row contains an 'Active' status and a green eye icon, which is circled with an orange box and a '2'.

Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Status	Actions
None	abd street Kiev Greater Poland 123142 Poland	Address	R41 Test	PMI affiliate	Active
None	Plac Oficerow 8 Katowice Silesia 40-014 Poland  Preferred Language: Polish	Address	US2102 PL	PMI affiliate	Active
None	Picadilly Circus 12 London London 21543 United Kingdom  Preferred	Address	North Ireland Test	PMI affiliate	Active

Before invoicing, you will also need to add Payment Methods (previously named Remit-to). This can be done by going to Setup Tab, Admin Subtab, and choose Add Payment Methods.

1. **Click** Add Payment Method button to create new Payment Method related to legal entities.
2. **These Buttons** are to activate or deactivate existing Payment Method.

# REGISTRATION AND SET-UP



## Add Payment Method

**1**

### Add Payment Method

Legal Entity: R41 Test

Invoice From Address: Plac oficerow 8  
Katowice, Silesia, 40-014  
Poland

Back Next

**2**

\* Payment Type: Bank Account

What are your Bank Account Details?

Address

Bank Account

Virtual Card

**3**

### Add a new Payment Method

\* Payment Type: Bank Account

What are your Bank Account Details?

Bank Account Country/Region: Poland

Bank Account Currency: PLN

Beneficiary Name: R41 Test

Bank Name:

Account Number:

Confirm Account Number:

IBAN:

Confirm IBAN:

Routing (Bank Code) Number: Bank Code

SWIFT/BIC Code:

My bank does not have a BIC code

Branch Code:

Bank Account Type: Business

Supporting Documents: Choose Files No file chosen

Email Address: kpmgstest0@gmail.com

Cancel Save & Continue

**4**

1. Choose the legal entity you want to associate the Payment Method to
2. Choose the Payment Type (Address option is preferable for PMI)
3. Fill in the details based on the Payment Type
4. Click Save & Continue

### **IMPORTANT:**

**!** Please remember that you must create in the Coupa Supplier Portal (CSP) **exactly the same Payment Method (Address and Bank Information) that you have already communicated to PMI.** If you need to change the Payment Method - first deactivate the confirmed one and create the new one. If you create a new Payment Method Address in the CSP with information not provided to PMI before, your invoice will be disputed (where legally allowed) and you will be asked to go through PMI's Vendor Master Data process. If dispute is not allowed by law, a credit note needs to be issued for the invoice with incorrect Payment Method and a new one needs to be submitted with the Payment Method properly registered with PMI.

- New Payment Method will only be created for new VAT numbers and will be done following the standard VMD process
- If the supplier is only changing the address and not VAT number, it will have to follow the standard VMD process.

# REGISTRATION AND SET-UP



## The Web Portal

The screenshot shows the top navigation bar with 'TEST', 'NOTIFICATIONS 99+', and 'HELP'. The 'NOTIFICATIONS 99+' button is highlighted with an orange box and a '1' in a circle. Below the navigation bar is a section titled 'My Notifications' with a 'View All' dropdown. Below this is a table with columns 'Message' and 'Received'. The table is empty, showing 'No Rows.' Below the table are 'Delete' and 'Mark as Read' buttons. A 'Notification Preferences' link is highlighted with an orange box and a '2' in a circle.

Notifications settings can be set and maintained for each CSP account

1. **Click** the Notifications button to see the latest notifications for you
  - ! Coupa provides Notifications on the Portal (in this list), to be sent via email or SMS
2. **Click** the Notification Preferences to see and configure your Notification settings. To enable SMS notifications, you need to verify your phone number.

# REGISTRATION AND SET-UP



## Your Profile

coupa supplier portal

TEST | NOTIFICATIONS 00+ | HELP

Business Profile | Legal Entities | Information Requests | Performance Evaluation

Action Required

Test

Profile Preview | Copy Profile URL | Download as PDF

Company Info

Company Name	Industry	About
Test		
Tax ID	Year Established	Commodities
None(has no tax ID)		
Products and Services	PO Email	Website
DUNS	Company Size	Ownership Type
Areas Served	No coverage in areas	
Global		

Contacts

Add User

Search

Name	Primary Contact	Email	Work Number	Purpose	Actions
------	-----------------	-------	-------------	---------	---------

To maintain your company profile, you can edit the information by going to Business Profile tab, Business Profile subtab.

Then click the pencil icon as shown in the image.

# REGISTRATION AND SET-UP



## Your Profile

The screenshot shows a profile setup form with the following sections and callouts:

- 1** Callout points to the profile preview area, which includes a "Test" label and links for "Profile Preview", "Copy Profile URL", and "Download as PDF".
- 2** Callout points to a background edit button (pencil icon).
- 3** Callout encompasses the "Company Info" section, which includes fields for Company Name (with "Test" entered), Industry, About, Year Established, PO Email, Website, DUNS, Company Size, and Ownership Type. A "Cancel" and "Save" button are located at the top right of this section.
- 4** Callout encompasses the "Tax ID" section, which includes fields for Country/Region and Tax Registration.
- 5** Callout points to the "Save" button.

Once you click the edit button, you can edit the company profile

- 1. Profile Preview** will show you how your company profile will be seen in public
- 2. Background Edit Button** to edit the image you want to show in your company profile
- 3. Company Info** can be filled to show the information you want to display
- 4. Tax ID** can be filled here, although it will not be shown in the company profile
- 5. Save** button for when you have completed the information

(continue to the next page)



# REGISTRATION AND SET-UP



## Your Profile

**1** Diversity Classification and Certification

Small Business Enterprise ✎ 🗑️  
[Add Diversity](#)

Commodities ⌵  
Apparel ✕

Product and Services Categories ⌵  
Clothing ✕

Areas Served ⌵  
 Global  Regional  
Global ✕  
No coverage in areas  
Search no coverage areas ⌵

**2** Contacts

[Add User](#)  🔍

Name	Primary Contact	Email	Work Number	Purpose	Actions
	Yes				<span>✎</span>
	No				<span>✎</span>

Per page 5 | 15 | 30

- 1. Information** such as Diversity, Commodities, Product Services Categories, and Areas Served can be edited here
- 2. Contacts** can be seen here, however if you are to add or edit, you will be redirected to the Users page  
The Primary Contact will be shown in the Business Profile

(continue to the next page)

# REGISTRATION AND SET-UP



## Your Profile

1

### Addresses

Add Address

Address	Primary Address	City	State	Postal Code	Country/Region	Actions
1872	Yes	ZURICH		8036	CH	

2

1. **Addresses** for your business can be added here. The Primary Address will be shown in the Business Profile
2. Once all the information have been completed as needed, you can go back to the top of the page and click **Save**

# REGISTRATION AND SET-UP



## Your Profile

The screenshot shows a business profile page for a company named 'Test'. At the top left, there are navigation links: 'Profile Preview', 'Copy Profile URL', and 'Download as PDF'. A red callout box labeled '1' highlights the 'Profile Preview' link. Below this, a large grey rectangular area is highlighted with a red callout box labeled '2'. To the right of this area, there is a section for 'Products/Services Categories' with a 'Clothing' button, and a section for 'Areas Served' with a 'Global' button. Below these, there is a 'Registered Address' section with the address '1872, ZURICH, 8036, Switzerland', and a 'Primary Contact' section with a profile picture placeholder, the name 'Test ZURICH', and the email 'kpmsatest0@gmail.co'. At the bottom of the page, it says 'Generated By Coupa supplier portal'.

1. To see your Business Profile shown to the public, you can click the button
2. The Business Profile will be shown alongside the information you have provided beforehand

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# PURCHASE ORDERS



## PO Notification



The screenshot shows an email notification from Coupa. The email header includes the Coupa logo and the subject line "PMI affiliate Purchase Order #5701241357". The body of the email starts with "Hi" and a message: "This is to inform you Purchase Order 5701241357 from PMI affiliate has been issued, and this same notification has been sent to your fellow team members with access to the Coupa Supplier Portal." Below the text is a table with the following details:

Submitted By	s-SIRIUSRescueQA s-SIRIUSRescueQA		
Supplier	0000020592		
Total	200.00	USD	
Items	test		200.00 USD

An orange box with the number "1" highlights a blue "View Order" button. Below the email content is a screenshot of the "coupa supplier portal" login page. An orange box with the number "2" highlights the "Login" form, which includes an "Email" input field, a "Continue" button, and links for "New to Coupa? CREATE AN ACCOUNT" and "Forgot your password?".

Your Company will receive an email which includes the PO details and a link to review the order in your CSP account

1. **Click** on the View Order link to be redirected to the CSP home screen
2. **Enter** your log-in information to access your CSP account and review the PO

# PURCHASE ORDERS



## PO Module

**2** Orders

Select Customer PMI affiliate

**1**

### Purchase Orders are Listed by Customer

- 1** Choose your customer at the top right  
Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.
- 2** Create invoices from POs  
Act or invoice from a PO Use the actions in the table or on the PO to manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected action is not available to you.

Got It

View	All	Search	
Unanswered Comments	Total	Assigned To	Actions
	None		
	50.00 EUR		
	100.00 EUR		

To review Purchase Orders raised by PMI:

- 1.** Go to the Home Page and **select** Customer PMI affiliate.
- 2.** **Click** on the Orders button.

# PURCHASE ORDERS



## PO Module

PO Number	Order Date	Status
5701241358	01/15/25	Issued
5701241358	01/15/25	Issued

Total	Assigned	Actions
25.00 CHF		
None		
50.00 EUR		
100.00 EUR		

Once all information is completed, you will see a list of all POs, their status, amount, and the option to flip them into Invoice or Credit Note

1. **Click** on the PO number to access the complete details of the PO

Please ensure to acknowledge the PO

2. **Review** the status of each PO

3. **Review** the total of the PO

4. **Click** the icons to take an action:

Flip to Invoice

Flip to Credit Note

# PURCHASE ORDERS



## CSP PO Details

1 Purchase Order #5701241356

General Info

2 Status Issued - Sent via Email

3 Order Date 01/15/25

4 Revision Date 01/15/25

5 Requester CH Requestor 1 PM

6 Email Testusercoupadev+2000000001@gmail.com

7 Payment Term SPEC

Attachments None

8 Acknowledged

9 Shipping

Ship-To Address Philip Morris Products S.A.  
Quai Jeanrenaud 3  
2000 Neuchatel  
Switzerland  
Location Code: CH01  
Attn: CH Requestor 1 PMI  
VAT ID CHE116276488TVA

Terms None

Shipment Tracking + Add

No shipment tracking.

After clicking on the PO number on the list, the system will display all the details of the PO:

1. PO Number
2. PO Status
  - a) Issued
  - b) Cancelled
  - c) Closed
  - d) Soft closed
3. Order Date
4. Revision Date (if any change was performed by PMI Requester)
5. Requester's name
6. Requester's e-mail
7. Payment Terms
8. After the PO is reviewed, **ensure to acknowledge the PO**
9. Delivery address
  - ! If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address (6)



# PURCHASE ORDERS



## CSP PO Details

The screenshot shows the 'Lines' section of a purchase order. It includes a table with columns for Type, Item, Qty, Unit, Price, Total, and Invoiced. Below the table are various fields for product details, dates, and taxes. At the bottom, there is a summary box with 'Total USD 1,230.00' and action buttons: 'Create Invoice', 'Save', and 'Print View'. Annotations 1-5 highlight specific areas: 1. Line item details (Type, Item, Qty, Unit, Price, Total); 2. Invoiced amount; 3. End Date and Start Date; 4. Total amount; 5. Action buttons.

2	Type	Item	Qty	Unit	Price	Total	Invoiced
		R41 POGR_10	10	each	123.00	1,230.00	0.00

\*End Date: 01/31/25  
Start Date: 09/01/24

Total USD 1,230.00

Create Invoice Save Print View

At line level, you will be able to review all order detailed items:

1. **Review** product description, quantity, UoM, price and total amount
2. **Review** the amount already invoiced for that PO
3. **Review** required dates of delivery (for goods Start and End date should be the same)
4. Review total values for the entire PO
5. Action buttons
  - a) Click on “Create Invoice” to flip the PO to an invoice
  - b) For PDF version, click on Print View

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# COMPLIANT ELECTRONIC INVOICE



## TYPES OF INVOICES

### Paper based Invoices

- Classical paper, typically received via postal services
- Paper based archiving as one option
- Scan & OCR processes / non-paper based archiving as alternative options
- Paper based or digital archiving has to comply to local regulations (integrity & authenticity)

### Electronically submitted invoices (via e-mail or PMI Self Service Portal)

- .tiff/.pdf invoices / sometimes received via file service
- Digital archiving has to comply to local regulations (integrity & authenticity)

### Compliant Electronically Submitted Invoices

- Invoices which legally comply to local requirements and to integrity & authenticity
- Invoices are created by a service provider on behalf of the supplier
- Relevant invoice criteria will be evaluated during the invoicing process (varies by country)
- The one and only legal digital invoice has to be digitally archived according to local regulations

PMI TARGET

# COMPLIANT ELECTRONIC INVOICE



## ARCHIVING

### General requirements:

- Archiving has to fulfill integrity & authenticity principles
- Integrity: Providing proof that the content is not manipulated
- Authenticity: Providing proof that the invoice comes from the indicated supplier
- Important: Integrity & authenticity have to be proofed over the whole retention period!

### Local requirements (examples):

- Switzerland requires a digital signature as proof of integrity
- Norway requires local archiving within Norway/the Nordics

### Note:

- Coupa leverages services with its partners Trustweaver and PricewaterhouseCoopers to deliver electronic invoicing compliance for PMI
- For invoices created via Coupa's Compliant Invoicing Service Coupa provides compliant archiving

# COMPLIANT ELECTRONIC INVOICE



▪ Electronic invoicing is PMI's preferred method of invoicing for PMI entities registered in Switzerland, US and UK (Global Studio). Your company needs to be registered in one of following country:

Australia	Denmark	Ireland	Montenegro	Slovenia	United States
Austria	Estonia	Italy	Netherlands	South Africa	
Belgium	Finland	Japan	New Zealand	Spain	
Bulgaria	France	Latvia	Norway	Sweden	
Canada	Germany	Lithuania	Poland	Switzerland	
Croatia	Greece	Luxembourg	Singapore	United Arab Emirates	
Czech Republic	India	Malta	Slovakia	United Kingdom	

Check the page for the most recent list of countries:  
[Coupa supplier support | PMI - Philip Morris International](#)

▪ Invoices templates for these countries have been activated in the system, which means that all legally required fields in each country will be reflected in the Coupa Supplier Portal Invoice template

# INVOICES



## Create Invoices



Our compliant invoicing Terms of Use have been revised.  
Please confirm that you have read and agree to the current [Terms of Use](#).  
If you do not agree, you will not be able to send invoices to Coupa compliant customers.

1

I Accept

2

### **IMPORTANT:**

Electronic invoice can be created via Coupa **ONLY** in countries from list mentioned in the previous slide. We are referring here to a country where supplier is registered and where invoice would be generated.

After clicking the Golden Coins Icon, or the “Create Invoice” button, the system will request a responsible person from your Company to **accept Coupa’s Terms of Use:**

1. **Click** on “Terms of Use” to access the document
2. After reviewing the terms, **click** on “I Accept” to continue.

Please note that acceptance of these terms also means you agree that Coupa will generate e-invoices on your behalf and that e-invoices in Coupa **MUST** mirror exactly the invoice information in your accounting system.

# INVOICES



Create Invoices - example of the template for European based entity. Please note that fields to be filled on invoice template may vary due to relevant country legislation.

**1** \* Invoice #

**2** \* Invoice Date 01/21/25

**3** \* Currency EUR

Delivery Number

Status Draft

**4** Supplier Note

Attachments

Payment Order Reference

**5** Late Payment Penalties

Exchange Rate

**6**

**From**

\* Supplier 0000111173 - KPMG SA

\* Supplier VAT ID CHE116276488TVA

\* Invoice From Address TESTINVOICE  
Philip Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland

\* Remit-To Address TESTINVOICE  
Philip Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland

\* Ship From Address TESTINVOICE  
Philip Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland

**To**

Customer PMI filiale

\* Bill To Address Philip Morris Switzerland Sàrl (CH Division)  
Avenue de Rhodanie 50  
1007 Lausanne  
Switzerland

\* Buyer VAT ID

Ship to Address PHILIP MORRIS SWITZERLAND SARL (CH Division)  
Avenue de Rhodanie 50  
1007 Lausanne  
Switzerland  
Location Code: CH30

PMI Due Date None

After clicking the Golden Coins icon, you will need to manually add some information:

- 1. Type in** the unique invoice no. provided by your system. Remember that number must be unique within different years. **Review** the invoice date (will be set as today by default but can be edited)
- 2. Review** the payment terms (are set by default on POs and Invoices), and the date of supply (set by default to today but can be edited)  
Taxation period is identified based on **Date of Supply** – this is why it is important to fill it carefully.
- 3. Set** the currency (has to match the PO currency, if there's a mismatch between PO and invoice currency there will be an error), and **type in** delivery number
- 4. Add** any additional document to support your invoice, **but please do not attach any image of your invoice** (PMI will only consider the e-invoice generated by CSP as the legally/fiscally binding one and will disregard the attached image). **Add** comments to clarify the attachments.  
**Use Payment Order Reference** field to provide POR/ISR details (input only relevant number - no other information or comments - in the following sequence: **“Short number/ Long number”** (ISR number/ISR reference))
- 5. State** late payment penalties arranged and the exchange rate
- 6. Review** the information imported from the PO and make sure its correct (From an To addresses)  
**Buyer VAT ID** should be driven by the country of delivery.

# INVOICES



Create Invoices - example of the template for European based entity. Please note that fields to be filled on invoice template may vary due to relevant country legislation.

1

Type	Description	Qty	UOM	Price
	CRPM-1037 R41 POGF	5,000	each	10.00

50.00

PO Line: 5701241122-2  
Service Sheet Line: None  
Contract: [dropdown]  
Supplier Part Number: [input]

Reference ID: [input]  
Billing: 9-0080500100-1002100010-0000-No

Taxes

VAT Rate	VAT Amount	Tax Reference
[dropdown]	0.00	[input]

2 + Add Line + Pick lines from Contract

3

Totals & Taxes	
Lines Net Total	90.00
Lines VAT Totals	0
Total VAT	0.00
Net Total	90.00
<b>Gross Total</b>	<b>90.00</b>

4

Delete Cancel Save as Draft Calculate Submit

After clicking the Golden Coins icon, you will need to manually add some information

1. **Review** PO line-item migrated data – Select VAT and calculate VAT tax at line level
  - a) The Vat Rate in the drop-down menu will be a generic tax code that differentiates Goods/Services and EU/Non-EU type of transaction – supplier must choose the most appropriate one
  - b) If you invoice partially (only vs. selected PO lines) then please delete the lines you do not invoice against and **please do not submit them with the value of 0.**
2. Add new non-PO invoice line to include additional costs not covered with a PO, e.g. Shipping, Handling etc.
3. Review subtotal, VAT and total amounts. Please remember to click „Calculate” each time you change value/price, to ensure correct VAT amount gets calculated.
4. Take an action using the Action Buttons – Only submit the invoice when finished



# INVOICES



## Create Invoices - example of the template for US based entity

### Create Invoice Create

#### General Info

1 \* Invoice #

2 \* Invoice Date 01/21/25

3 \* Invoice Date 01/21/25

4 \* Currency USD

Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

Attachments  |  |

5

From

\* Supplier Supplier Name

Supplier Tax ID 46-284307

\* Invoice From Address US TEST

Supplier Address

United States

\* Remit-To Address US TEST

Supplier Address

United States

\* Ship From Address Supplier Address

United States

To

Customer PMI affiliate

\* Bill To Address

Customer Address

United States

Buyer Tax ID 99-1699304

Ship to Address

Customer Address

Location Code: USIT

PMI Due Date: None

After clicking the Golden Coins icon, you will need to manually add some information

1. **Type in** the invoice no. provided by your system and review the invoice date (will be set as today by default but can be edited)
2. **Review** the payment terms (are set by default on POs and Invoices), and the date of supply (set by default to today but can be edited).
3. **Set** the currency (has to match the PO currency, if there's a mismatch between PO and invoice currency there will be an error), and **type in** delivery number
4. **Add** any additional document to support your invoice, **but please do not attach any image of your invoice** (PMI will only consider the e-invoice generated by CSP as the legally/fiscally binding one and will disregard the attached image). **Add** comments to clarify the attachments.
5. **Review** the information imported from the PO and make sure its correct (From an To addresses) Buyer VAT ID should be driven by the country of delivery.

# INVOICES



## Create Invoices - example of the template for US based entity

**1** Lines  Line Level Taxation

Type	Description	Qty	UOM	Price	
	Training	60.000	Hour	100.00	6,000.00

PO Line: 5701241123-1  
Service Sheet Line: None  
Contract: MC\_TEST\_SCOUT&ID (Publi:   
Supplier Part Number:   
Reference ID:   
Billing: J-0088700101-0000-MS-210224AZ/DA/ALLO/P4PR-No-USIT

**2**

**3** Totals & Taxes

Lines Net Total	6,000.00
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	6,000.00
<b>Total</b>	<b>6,000.00</b>

**4**

After clicking the Golden Coins Icon ,you will need to manually add some information

### 1. Review PO line-item migrated data

Input the tax rate relevant for your State to calculate tax amount at line level.

Tax description can be left blank, in case any clarification is needed please include it under tax reference.

If you invoice partially (only vs. selected PO lines) then please delete the lines, you do not invoice against and please do not submit them with the value of 0.

2. Add new non-PO invoice line if you need to include additional costs not covered with a PO, e.g. Shipping, Handling etc.

3. Review subtotal, TAX and total amounts. Please remember to click „Calculate” each time you change value/price, to ensure correct TAX amount gets calculated.

4. Take action using the Action Buttons – Only submit the invoice when finished

# INVOICES



## Create Invoices



Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">R41_3CN</a>	01/17/25	Approved	<a href="#">5701241054</a>	2,000.00 CHF	No		

1

2

3

Once the invoice is submitted, the system will confirm it.

- 1. Click** on the Invoice number to access the complete details of the Invoice.
- 2. Review** the invoice status:
  - a) New: new invoice created
  - b) Draft: Invoice created but not yet submitted
  - c) Processing: The invoice is being transferred to PMI
  - d) Pending Approval: Currently with business approver and with AP, awaiting further processing at PMI
  - e) Approved: Invoice accepted for payment
  - f) Voided: There was an error in the invoice thus it must be checked by you
- 3. Click** the associated PO number to see details of PO.

# INVOICES – IMPORTANT REMARKS



## Availability of legally compliant e-invoicing

- If your Company is registered in one of the countries mentioned in table below and would like to invoice CH, US or Global Studio PMI entity, please continue or start using simple and innovative e-invoicing via CSP.

Australia	Denmark	Ireland	Montenegro	Slovenia	United States
Austria	Estonia	Italy	Netherlands	South Africa	
Belgium	Finland	Japan	New Zealand	Spain	
Bulgaria	France	Latvia	Norway	Sweden	
Canada	Germany	Lithuania	Poland	Switzerland	
Croatia	Greece	Luxembourg	Singapore	United Arab Emirates	
Czech Republic	India	Malta	Slovakia	United Kingdom	

- If your Company is not registered in these countries, please continue sending your invoices as per instructions from PO Print view.

## Requirements for legally compliant e-invoicing

- Invoices submitted via Coupa Supplier Portal (CSP) should represent and fully match invoices registered in your accounting system.
- After completing all the fields included in the country specific invoice template and submitting it to PMI, Coupa will generate a legally compliant invoice on your behalf. In this regard no paper/PDF version of the invoice should be sent via post/e-mail to PMI.
- No PDF invoice should be attached to the legally compliant invoice in Coupa. If any, PMI will disregard it.
- Currency of the invoice should be the same as in the corresponding Purchase Order. The Units of Measure applied in the Purchase Order must not be modified in the invoice.
- In case you need to partially invoice a particular PO, in the Coupa Supplier Portal you must delete the entire PO line(s) not to be invoiced. In any case, invoice lines should not be sent with zero quantity on it.

# INVOICES – IMPORTANT REMARKS



## Non-PO invoice

- Only invoices with reference to Purchase Order are acceptable by PMI in Coupa.
- In case invoices without reference to Purchase Order must be issued, please continue sending them as usual in paper or PDF format.

## Additional charges not covered by PO

- Additional charges (e.g. shipping, other costs) not estimated on Purchase Order should be added as non-PO backed invoice lines. To do this, select "Add Line" in the invoice template.

## Payment information

- When creating the Payment Method (previously called Remit To Address) under your company Business Profile in the Coupa Supplier Portal, please provide banking information. In case your banking information is changed, please create a new Payment Method and inform PMI about the update using standard communication channels.
- Once the invoice is paid, payment date is available under Payment Information section of invoice in Coupa Supplier Portal. Stated payment date is only for informative purposes. Please validate with your bank exact payment date.

# INVOICES – IMPORTANT REMARKS



## Credit Note

- When an invoice needs to be corrected you will need to send a Credit Note that fully offsets the invoice. For quantity-based Credit Notes, the quantity value needs to be negative for a correct processing of the document in the Coupa Supplier Portal.
- For other cases in which you will need to send Credit Notes (Volume related, volume-based discount, partial, etc.), such document must be sent to PMI outside of Coupa using the other transmission channels.

## Authenticity, integrity and readability guaranteed within Coupa Supplier Portal

- Authenticity - Coupa assures that the invoice originates from the supplier company as stated on the legal invoice document. Coupa then sends the draft legal invoice to TrustWeaver using a secure (https) web services call, along with parameters indicating the Invoice Origin and Invoice Destination countries of the transaction. Depending on these country parameters, TrustWeaver will then apply one or two signatures of behalf of the authenticated supplier.
- Integrity - Coupa and its partner Trustweaver guarantee the integrity of the invoices, both on the transaction and during the period of legal archiving.
- Readability - Coupa produces a human readable image of the invoice data in PDF format.

# INVOICES – IMPORTANT REMARKS



## Coupa Supplier Portal vs local requirements

- E-invoices from the Coupa Supplier Portal are compliant with local VAT and tax regulations. Coupa works with PricewaterhouseCoopers to ensure that local fiscal and e-invoicing regulations are met on a continuous basis

## Digital signatures vs local applicable law

- With regards to digital signatures, Coupa works together with TrustWeaver. The TrustWeaver solution is seamlessly integrated with the Coupa infrastructure, to provide a legal compliant electronic invoicing service to all of Coupa's clients. Coupa produces a human readable image of the invoice data in PDF format. The signatures created in this process are Qualified Electronic Signatures adhering to the CADES-A standard

## Avoiding duplicates

- You must not send duplicates of e-invoices created in Coupa in PDF/paper via other channels.

## Prepayment

- Invoices related to prepayment should be issued according to special instructions. Please, contact Accounts Payable Contact Center – contact details can be found on the website: <https://www.pmi.com/suppliers/platforms-how-to-invoice-pmi#contact>

# INVOICES – IMPORTANT REMARKS



## Swapping quantity and price

- You should never swap quantity and price values once you invoice against an acknowledged Purchase Order – please see the following example:
- Example of PO in Coupa (5700003967):

Lines

Type	Item	Qty	Unit	Price	Total	Received	Invoiced
1	VB - FG ACTIVITIES 2017	1,314,000	Activity unit	1.00	1,314,000.00	140,958.15	370,146.03

* End Date	Part Number	* Commodity	Savings (%)
12/31/17	None	U78120000-Material packing and handling	0

Account	Period	* Start Date	Valuated Contract
CH1002-PM PRODUCTS SA 9-Cost Center-0084100109 - Handling - Other-1002370010 - Finished Goods Bulk Storage-0000-No 9-0084100109-1002370010-0000-No		01/01/17	None

PO Language	* Change Request
French	None

<b>Total</b>	<b>1,314,000.00</b>	CHF
--------------	---------------------	-----

## Example of incorrect invoice against PO 5700003967:

Lines

Type	Description	UOM	Quantity	Price	Total	PO Line	Contract	Billing	Period
1	VB - FG ACTIVITIES 2017	AU	1	11,351.52	11,351.52	5700003967-1	None	CH1002-PM PRODUCTS SA 9-Cost Center-0084100109 - Handling - Other-1002370010 - Finished Goods Bulk Storage-0000-No 9-0084100109-1002370010-0000-No	None

VAT Code	VAT Rate	VAT Amount	Tax Reference	VAT Supply Date
None	8.000%	908.12		

PMI Tax code	Contract Payment Terms
CH:DD-8% In-Goods & Services DOMESTIC	None

Tags None

Taxes

Tax Summary	
VAT (8.0%)	908.12
<b>Total VAT</b>	<b>908.12</b>

Totals

Line Net Total	11,351.52
Subtotal	11,351.52
Total VAT	908.12
<b>Gross Total</b>	<b>12,259.64</b>



# CREDIT NOTE



## Important Remarks:

- When an invoice needs to be corrected, you should **only submit Credit Notes that fully offset the invoice**, prior to sending a new correct invoice.
- If you need to send a Credit Note that for instance relates to a volume-based discount on yearly transactions, such Credit Note must be sent to PMI outside Coupa using other transmission channels.

# CREDIT NOTE



Create Credit Note by flipping PO - example of the template for European based entity. Please note that fields to be filled on invoice template may vary due to relevant country legislation.

**Create Credit Note** Create

**General Info**

- 1 \* Credit Note #
- 2 \* Credit Note Date 01/21/25
- 3 Payment Term CR60
- 4 \* Currency CHF
- 5 \* Original Invoice #
- 6 \* Original Invoice Date mm/dd/yy

Supplier Note

Attachments Add File | URL | Text

Payment Order Reference

Credit Reason

Late Payment Penalties

**From**

- \* Supplier 0000111173 - KPMG SA
- \* Supplier VAT ID CHE110276488TVA
- \* Invoice From Address TESTINVOICE  
Philips Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland
- \* Remit-To Address TESTINVOICE  
Philips Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland
- \* Ship From Address TESTINVOICE  
Philips Morris International  
Quai Jeanrenaud 3  
2000 Neuchâtel  
Switzerland

**To**

- Customer PMI affiliate
- \* Bill To Address Philip Morris Products S.A.  
Manufacturing Division  
Quai Jeanrenaud 3  
2000 Neuchatel  
Switzerland
- \* Buyer VAT ID
- Ship to Address Philip Morris Products S.A.  
Quai Jeanrenaud 3  
2000 Neuchatel  
Switzerland  
Location Code: CH01
- PMI Due Date None

After clicking the Copper Coins icon, you will need to manually add some information

1. **Type in** the Credit Note no. provided by your system and
2. **Review** the Credit Note date (will be set as today by default but can be edited)
3. **Review** the payment terms (are set by default), and the original date of supply (set by default to today but can be edited)
4. **Set** the currency (has to match the PO and original invoice currency, if there's a mismatch between PO and invoice currency there will be an error), and **type in** delivery number
5. **Add** the original invoice number and original invoice date associated to the Credit Note
6. **Add** the reason of the credit note creation



Only one invoice can be associated to a Credit Note (1:1 relation)



The input in a Credit note that fully cancels the invoice must be the same as in the original invoice

# CREDIT NOTE

Create Credit Note by flipping PO - example of the template for European based entity. Please note that fields to be filled on invoice template may vary due to relevant country legislation.

1

Adjustment Type

Type	Description	Qty	UOM	Price	
	CRPM-1037 R41 POGI	-5.0	each	10.00	-50.00

PO Line: 5701241122-2    Service Sheet Line: None    Contract:

Reference ID:     Billing: 0-0080500100-1002100010-0000-No

Taxes

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

2

3

Totals & Taxes	
Lines Net Total	-90.00
Lines VAT Totals	0.00
<hr/>	
Total VAT	0.00
Net Total	-90.00
<b>Gross Total</b>	<b>-90.00</b>

4

!

Adjustment Type

Type

PO Line 5701241122-2

After clicking the Copper Coins Icon (red one), you will need to manually add some information

1. Review PO line-item migrated data – Select VAT rate and calculate VAT tax at line level
  - a) The VAT Rates in the drop-down menu are generic tax rates – you must choose the appropriate one.  
For VAT Exempt, please provide the legal basis for exemption of VAT in the Tax Reference field.
  - a) In case an invoice line is issued as q'ty x price, please put a negative value in q'ty, not in price.
2. Add new non-PO invoice line if you need to include additional costs not covered with a PO, e.g. Shipping, Handling etc.
3. Review subtotal, VAT and total amounts
4. Take action using the Action Buttons – Only submit the invoice when finished. Prior submitting, please click the Calculate button

### IMPORTANT:

The quantity and total amount of the credit note **must be negative values (-)** in case of quantity-based PO

The Unit Price and total amount of the credit note **must be negative values (-)** in case of amount-based PO

! Please choose "Quantity" or "Price" for adjustment type, not "Other". Usually if you flip credit note, it will be adjusted already

# CREDIT NOTE



## Create Credit Note by flipping PO - example of the template for US based entity

### Create Credit Note Create

#### General Info

1 \* Credit Note #

2 Credit Note Date 01/21/25

3 Payment Term R120

Original Date of Supply 01/21/25

4 \* Currency USD

Delivery Number

Status Draft

5 \* Original Invoice #

6 \* Original Invoice Date mm/dd/yyyy

Image Scan  No file chosen

Supplier Note

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

From

\* Supplier Supplier Name

Supplier Tax ID 46-284307

\* Invoice From Address US TEST

Supplier Address United States

\* Remit-To Address US TEST

Supplier Address United States

\* Ship From Address Supplier Address

United States

To

Customer PMI affiliate

\* Bill To Address Customer Address

United States



Buyer Tax ID 99-1000304

Ship to Address Customer Address

Location Code: USIT

PMI Due Date None

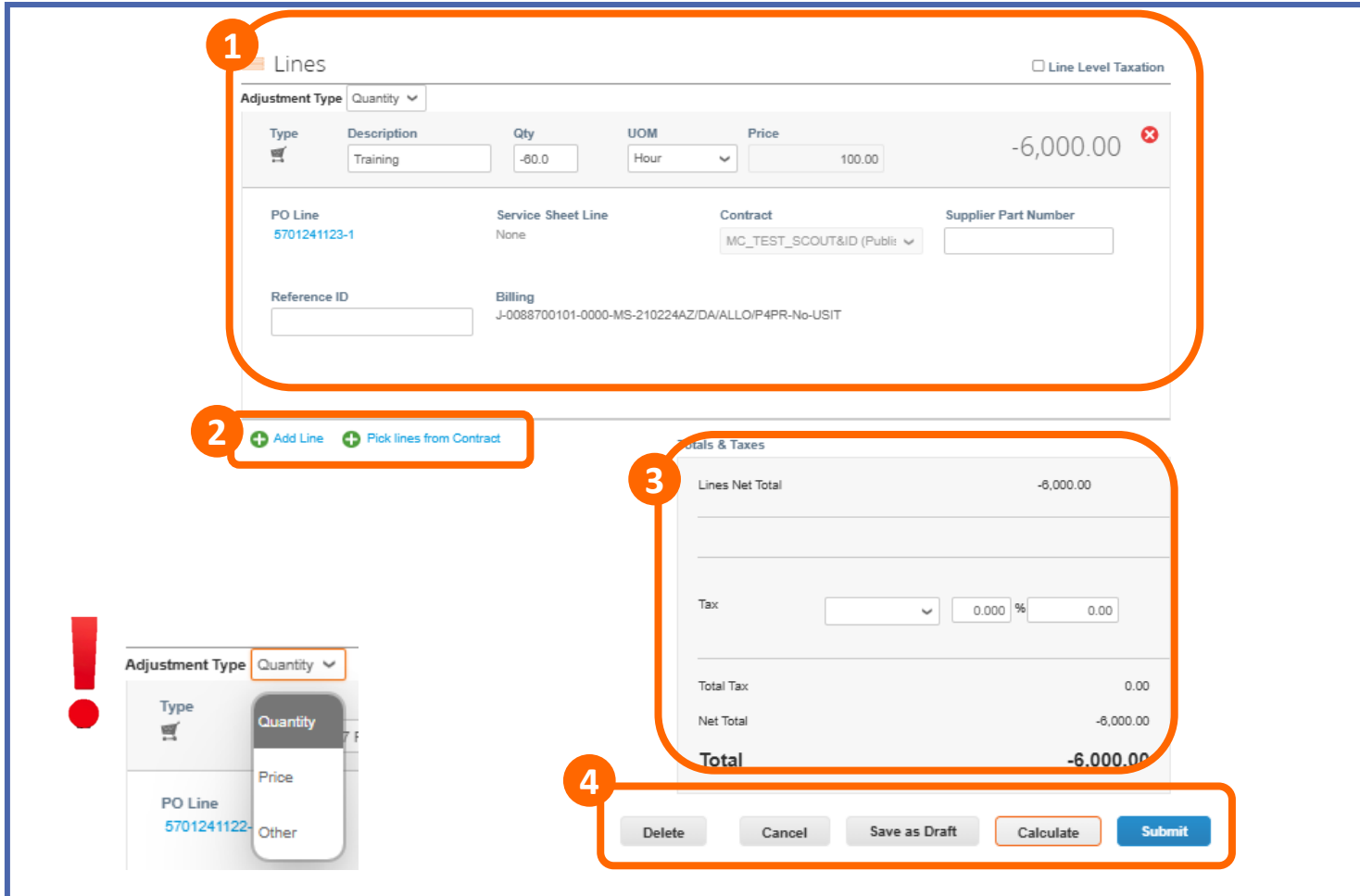
After clicking the Copper Coins Icon you will need to manually add some information

1. **Type in** the Credit Note no. provided by your system and
2. **Review** the Credit Note date (will be set as today by default but can be edited)
3. **Review** the payment terms (are set by default), and the original date of supply (set by default to today but can be edited)
4. **Set** the currency (has to match the PO and original invoice currency, if there's a mismatch between PO and invoice currency there will be an error), and **type in** delivery number
5. **Add** the original invoice number associated to the Credit Note  
 Only one invoice can be associated to a Credit Note (1:1 relation)
6. **Add** the original invoice date associated to the Credit Note  
 **The input in a Credit note that fully cancels the invoice must be the same as in the original invoice**

# CREDIT NOTE



## Create Credit Note by flipping PO - example of the template for US based entity



The screenshot shows the 'Lines' section of the Coupa interface. Callout 1 points to the 'Lines' table with columns: Type, Description, Qty, UOM, Price, and a total of -6,000.00. Callout 2 points to the '+ Add Line' and '+ Pick lines from Contract' buttons. Callout 3 points to the 'Totals & Taxes' section showing 'Lines Net Total' as -8,000.00 and 'Total' as -6,000.00. Callout 4 points to the 'Calculate' and 'Submit' buttons. A red exclamation mark icon is visible on the left side of the interface.

After clicking the Copper Coins Icon (red one), you will need to manually add some information

1. Review PO line-item migrated data – Select VAT rate and calculate VAT tax at line level
  - a) The VAT Rates in the drop-down menu are generic tax rates – you must choose the appropriate one.  
For VAT Exempt, please provide the legal basis for exemption of VAT in the Tax Reference field.
  - a) In case an invoice line is issued as q'ty x price, please put a negative value in q'ty, not in price.
2. Add new non-PO invoice line if you need to include additional costs not covered with a PO, e.g. Shipping, Handling etc.
3. Review subtotal, VAT and total amounts
4. Take action using the Action Buttons – Only submit the invoice when finished. Prior submitting, please click the Calculate button

### ***IMPORTANT:***

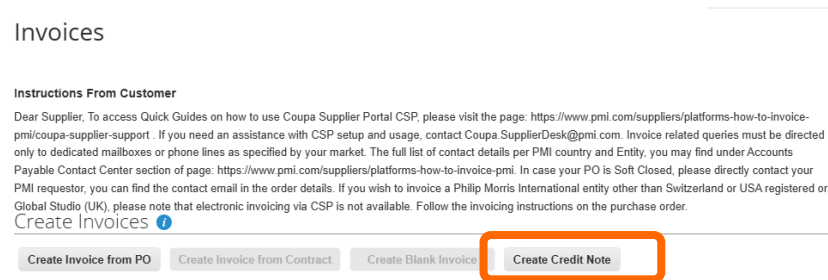
The quantity and total amount of the credit note **must be negative values (-)** in case of quantity-based PO

The Unit Price and total amount of the credit note **must be negative values (-)** in case of amount-based PO

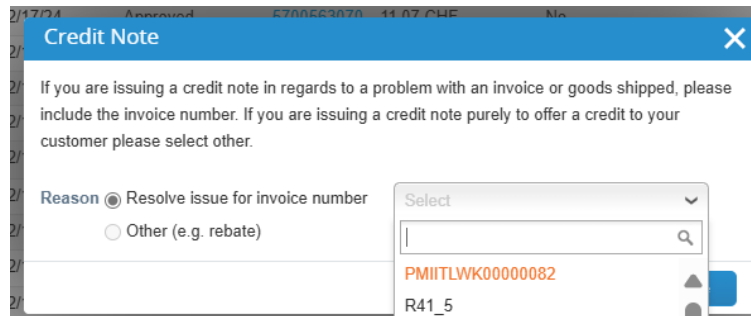
**!** Please choose "Quantity" or "Price" for adjustment type, not "Other".  
Usually if you flip credit note, it will be adjusted already

# Improved Credit Note tie-in to related invoice

- Now you can flip an invoice to a credit note and associate it to the original invoice. For these purposes, the button is already available for suppliers in “Invoices” tab in CSP:



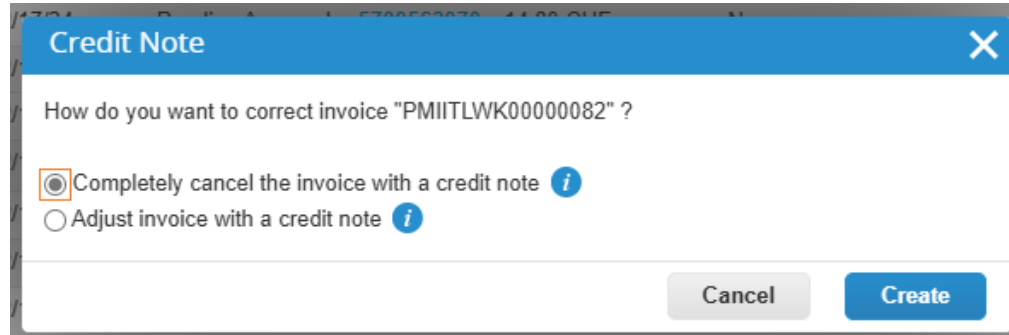
- After clicking on it a pop-up window appears on the screen:




- Please always choose “Resolve issue for invoice number” option and select invoice you need to cancel in a drop-down list. **Tip:** if you don’t see the invoice in a drop-down list, start typing the number of the invoice.

## Improved Credit Note tie-in to related invoice

- After selecting the invoice, another pop-up window appears:



- Only “Completely cancel the invoice with a credit-note” can be used in order to cancel incorrect invoice issued previously to PMI.
- After choosing “Completely cancel...” option a Credit-note fully replicating invoice fields but with negative sign “-” will be created automatically by the system. Fields from the invoice are not editable and locked by system.
- Before submitting the Credit-note, please make sure that minus “-” is on Qty or Amount (in case of service type of PO)
- Flip PO  functionality is still in place and can be used

# AGENDA



## CSP Guidelines

0	PMI Coupa
1	Coupa Supplier Portal Overview
2	Registration and Set-Up
3	Purchase Orders
4	Invoices
<b>5</b>	<b>Catalogues</b>
6	Admin
7	Q&A



# CATALOGUES



## PMI Approach

PMI wishes to transact with suppliers in the **most automated way** and as lean as possible.

The electronic **catalogue containing items/services is the preferred buying channel for PMI.**

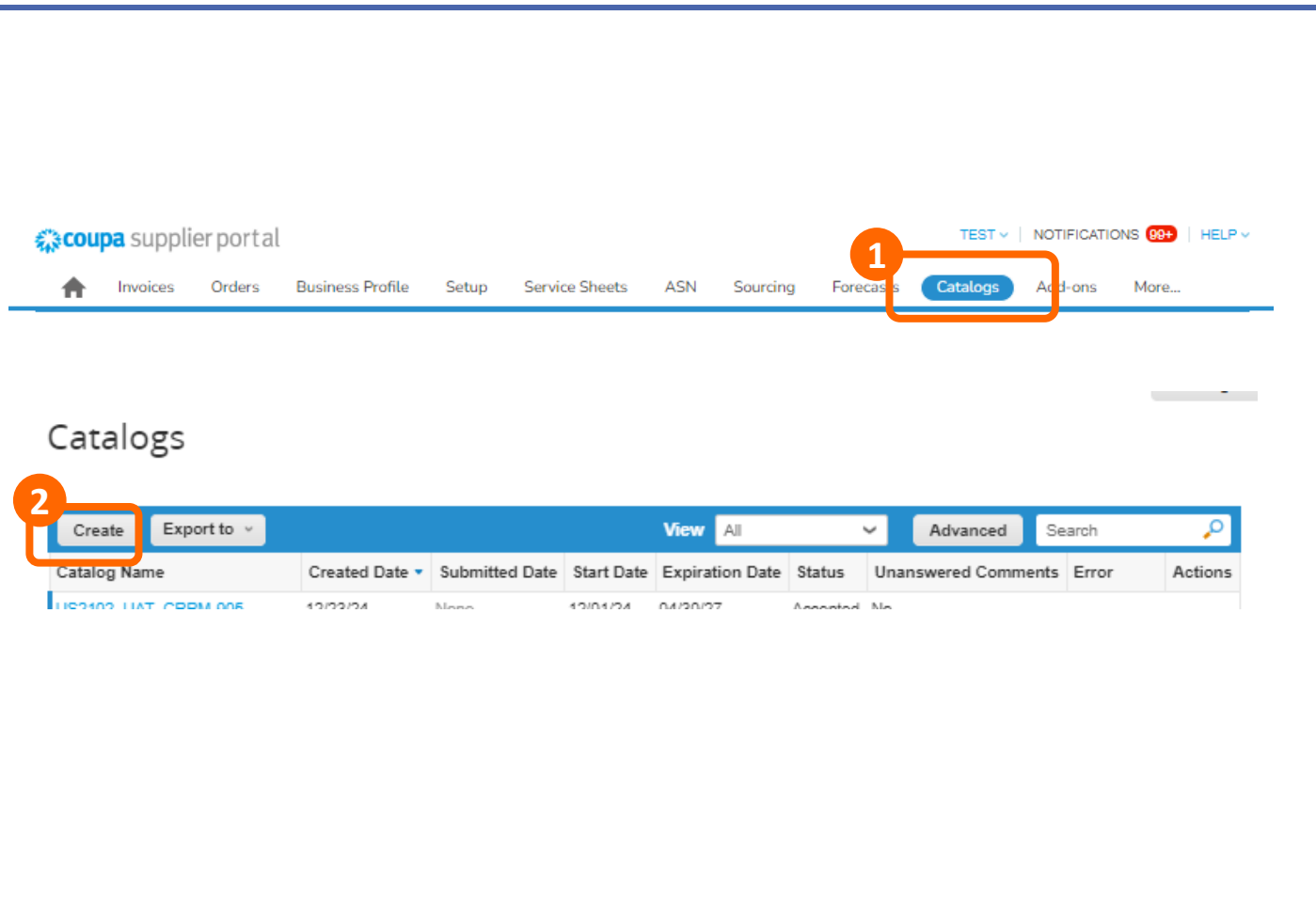
Purchase Orders would be generated on a basis of items picked up from the catalogue.

Next slides explain how to download existing catalogues and/or the empty template to be populated and provided to PMI Procurement contact person (offline).

# CATALOGUES



## Download Existing Catalogues and/or Empty Template from CSP (1/3)



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', 'TEST', 'NOTIFICATIONS 99+', and 'HELP'. The main navigation menu contains 'Invoices', 'Orders', 'Business Profile', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. The 'Catalogs' tab is highlighted with an orange box and a '1' in a circle. Below the navigation, the 'Catalogs' section is visible. The 'Create' button is highlighted with an orange box and a '2' in a circle. The table below shows a list of catalogues.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
US3403 IAT CBM 005	12/22/24	None	12/01/24	04/30/27	Accepted	None		

1. **Click** the Catalogs tab to access the module
2. **Click** „Create” to access catalogue management options.

# CATALOGUES



## Download Existing Catalogues and/or Empty Template from CSP (2/3)

Customer PMI affiliate

\* Catalog Name

Status Draft

Start Date  date when catalog prices become effective

Expiration Date  date when catalog prices become expired

Currency

0 Items Changed ( 89 unchanged )

0 Price Increase

0 Price Decrease

0 Other Fields Updated

0 New Items

0 Deactivated Items

Items Included in Catalog

All

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
At...							

1. Click „Load from file” to enter the section where catalogue files and template can be downloaded.



## Download Existing Catalogues and/or Empty Template from CSP (3/3)

### Bulk Load Item Updates for Test Catalog

Follow these steps to upload

1. **Download the CSV template or export** current list (Based on the CSV File Field Separator in your Language and Region settings.)

or

2. **Fill in or update the CSV file** [Click here](#) for a description of the required and optional fields in the template.

- Fields marked with a "\*" are mandatory.
- Each row uploaded will create a new .
- Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.

3. **Load the updated file**

No file chosen

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

1. **Download** the „CSV (Excel Comma Separated Values) template” (with no data populated) or export the same template with „current list of items”, in case you already have catalogue(s) with PMI.
2. **Click** this link to open a table explaining fields used in the template.



## Remarks Re. Use of Catalogue Template

1. „**Contract Number**” needs to be populated with a value PMI Procurement contact person can provide. It represents a technical contract created in Coupa reflecting the commercial agreement closed between PMI and the supplier. If left blank, PMI Procurement contact person has to populate it prior to catalogue loading in Coupa.
2. EU suppliers should populate **Intrastat-relevant fields** (for material/product items only):

BO	BP	BQ
Intrastat Net weight	Country of Origin	Harmonized Commodity Code

# CATALOGUES



## Manage Catalogues with PMI

Once the template / previous version of the catalogue is downloaded and then properly updated (a.o. based on mutually agreed prices) it can be sent by e-mail (in the CSV format) to PMI Procurement contact person who will proceed with PMI internal catalogue maintenance process.

# AGENDA



## CSP Guidelines

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7	Q&A

# ADMIN



## Users



coupa supplier portal

TEST | NOTIFICATIONS 99+ | HELP

Home Invoices Orders Business Procurement **Setup** Service Sheets ASN Sourcing Forecasts Catalogs Add-ons More...

Admin Customer Setup Connection Requests

Admin Users

Invite User View All Search

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
Inactive User	Inactiveuser@gmail.com	Deactivated	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Restricted Worker Access Restricted Worker Assignment Access Service Sheets Sourcing	PMI affiliate	None	Activate
Active User	Activeuser@gmail.com	Active	ASNs Admin Business Performance	PMI affiliate	None	Edit

Under the **Setup** tab you will be able to review and edit users, permissions, merge requests, the remit-to and CSP terms of use

1. **Click** on Setup tab – Admin subtab - Users section to access list of active users and invite the new ones
2. **Click** on Edit under Actions column to edit selected user’s permissions and preferences (details in next slide)



# ADMIN



## Users



1

Invite User

**User Information**

First Name

Last Name

\* Email

Purpose ⓘ  
Select Some Options

**Phone Number**

Country/Region

Area/City

Local

Extension

2

Permissions ⓘ Customers

All  
 Admin  
 Orders

All  
 Restricted Access to Orders

Invoices  
 Catalogs  
 Profiles  
 ASNs  
 Service Sheets

All  
 Restricted Access to Service Sheets

Payments  
 Order Changes  
 Early Payments  
 Business Performance  
 Sourcing

Private and Public  
 Hidden, Private, and Public

Order Line Confirmation  
 Forecast Planner  
 Workers

View  
 Manage

Worker Assignments

View  
 Manage

Cancel Send Invitation

To Invite a new user, the system will require complete name, surname and the e-mail address

1. **Type** in the data of the new account
2. **Review** and **select / deselect** all the permissions and customer profiles to be granted to the new user.

# ADMIN



## Permissions



### Permissions

- ASNs
- Admin
- Business Performance
- Catalogs
- Early Payments
- Forecast Planner
- Invoices
- Order Changes
- Order Line Confirmation
- Orders
- Payments
- Profiles
- Restricted Worker Access
- Restricted Worker Assignment Access
- Service Sheets
- Sourcing

The permissions defined for each active user will imply which tabs appear in his main menu, thus granting access to its functionalities.

The Admin of the account will have full access and is the only one who can edit permissions for the different active users.

# ADMIN



## Merge Requests

The screenshot shows the 'Admin Merge Requests' page. On the left is a navigation menu with items: Users, Merge Requests (highlighted with a red box and '1'), Merge Suggestions, Requests to Join, Fiscal Representatives, Payment Methods, Additional CaaS Information, sFTP Accounts, cXML Errors, sFTP File Errors (to Customers), and sFTP File Status (from Customers). The main content area is titled 'Initiate Merge Request' and contains a form with an email input field (containing 'coupa@coupamail.edu' and highlighted with a red box and '2'), an 'I'm not a robot' checkbox with a reCAPTCHA icon, and a 'Request Merge' button (highlighted with a red box and '3'). Below the form is a warning message: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.' At the bottom, there is a table of 'Open merge requests' (highlighted with a red box and '4') with one entry:

Open merge requests		Initiated From My Company	Cancel
Requested 08/24/23	mycompany 2702 SIXTH AVE TROY NY 12180 United States		

If you have already activated a CSP account for another client, you will be able to merge these accounts and have all your clients in the same place

You can manually request the merge by the Admin tab in the menu.

Also, Coupa will identify automatically when you accept the invitation if your company has an account and will display it

1. **Click** on Merge Requests to access your requests or request a new merge
2. **Type** the e-mail address of the account to merge, tick I'm not a robot reCAPTCHA
3. **Click** to send merging request
4. **Review** all merge requests

# ADMIN



## Merge Request



### Admin Merge Suggestions

The screenshot shows the 'Admin Merge Suggestions' page. On the left is a navigation menu with items: Users, Merge Requests, Merge Suggestions (highlighted with a red box and a '1' callout), Requests to Join, Fiscal Representatives, Payment Methods, Additional CaaS Information, sFTP Accounts, cXML Errors, sFTP File Errors (to Customers), and sFTP File Status (from Customers). The main content area has a heading 'Merge Suggestions' and a sub-heading 'Merge Suggestions are accounts with same confirmed email domain and at least one common credential such as Company Name, Address, Tax ID, DUNS Number.' Below this is a note: 'Before sending a merge request confirm that this email belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)' There are two callouts: '2' points to a checkbox labeled 'Enable Merge Suggestions' which is checked, and '3' points to a section titled 'Open Merge Suggestions' which contains the text 'All clear! No open merge suggestions.'

Coupa can also provide suggestions to merge accounts based on your email domain (@email.com)

1. Click on the link to access the *Merge Suggestions* on Admin
2. Tick the checkbox Enable Merge Suggestions
3. Should there be any accounts suggested, it will be shown here



## Merge Request

### Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with S.P.A. Choose who will become the owner of the merged account.

**1** **User**

**My Account**

- My users
- My customers
- My payment information
- My public profile

**Their Account**

- Their users
- Their customers
- Their payment information
- Their public profile

**Merged Account**

As the account owner, I will administer

- All combined users
- All combined customers
- All combined payment information

They will administer only

- Their users
- Their customers
- Their payment information


The merged account will use

- My public profile

**2** Account Owner  My Account  Their Account

By choosing this option I understand that I will no longer be the account owner.

**3** Note For Recipient

I'm not a robot 

**4** **Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)**

Cancel **Send Request**

When merging accounts, CSP will send an e-mail requesting the owner of the other(s) account(s) to merge. Here you will be able to request ownership or give ownership of the newly created account

- 1. Review** the user you are requesting the merge to
- 2. Select** the option with which you want the accounts to be merged: Give ownership or request ownership of the merged accounts
- 3. Write** any additional comments
- 4.** Read and click on the link for additional info regarding merging accounts

# ADMIN



## Remit To



Admin Remit-To

- Users
- Merge Requests
- Merge Suggestions
- Requests to Join
- Fiscal Representatives
- Payment Methods**
- Additional CaaS Information
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

**3** Add Payment Method View All Search

Payment Method Name	Remit-to Address	Payment type	Legal Entity	Customer Sharing Status	Actions
None	Akacyjna 7 Konin 20-202 Poland  Preferred Language: Polish	Address	KPMG R41	PMI affiliate	Active
None	abd street Kiev Greater Poland 123142 Poland	Address	R41 Test	PMI affiliate	Active
None	Plac Oficerow 8 Katowice Silesia 40-014 Poland  Preferred Language: Polish	Address	US2102 PL	PMI affiliate	Active

You will be able to manage your different Payment Methods under this tab

- 1. Click** on *Payment Methods* for accessing all your Payment Method records
- 2. Review** active your Payment Methods addresses
- 3. Click** to Add Payment Method to add new details

# ADMIN



## My Account



1 Account Settings

2 \* First Name Test

3 \* Last Name ZURICH

4 \* Email companyemail@email.com

5 Phone Number

6 Save

7 Change Password

Under My Account tab you will be able to edit your information

1. **Click** on your user name and Account Settings
2. **Edit** your first and your last name
3. **Edit** your e-mail
4. Purpose field does not need to be filled
5. **Fill in** your phone number information
6. **Click** to save the edit
7. **To change password** you can click here

# MANAGING NOTIFICATIONS



- Your Company will receive notifications regarding newly created Purchase Orders on dedicated email addresses (all users linked to the CSP account).
- System will generate two notifications:
  - One notification directly in the Coupa Supplier Portal
  - Email notification generated by Coupa Supplier Portal
- To adjust your notification preferences, access the notifications menu ( **NOTIFICATIONS** **1** ) and go to Notification Preferences ( **Notification Preferences** )



# AGENDA



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CSP FAQ: <https://supplier.coupa.com/help/faqs/>

Should you have any questions related to CSP, please review our webpage:  
<https://www.pmi.com/suppliers/platforms-how-to-invoice-pmi/coupa-supplier-support>

or contact the PMI Coupa Supplier Desk: [Coupa.SupplierDesk@pmi.com](mailto:Coupa.SupplierDesk@pmi.com)