Vantive

Coupa Supplier Training

HOW TO ADD A CUSTOMER to the Coupa Supplier Portal (CSP)

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DISCLAIMER

Coupa is constantly making improvements and issuing new releases to its platform. Therefore, screen captures and pictures shown in this document might not reflect the latest version of Coupa at Vantive.

HOW TO REQUEST ACCESS TO THE COUPA SUPPLIER PORTAL (CSP)

Suppliers should raise a service request with the Vantive Team in ServiceNow for CSP access:-

To access the Service Now portal suppliers should visit the Vantive.com site - Partners, Suppliers & Customers | Vantive Corporate

- Link to ServiceNow **Registration**
- Link to ServiceNow **Portal**
- Link to Supplier **User Guide (how to submit a request)**

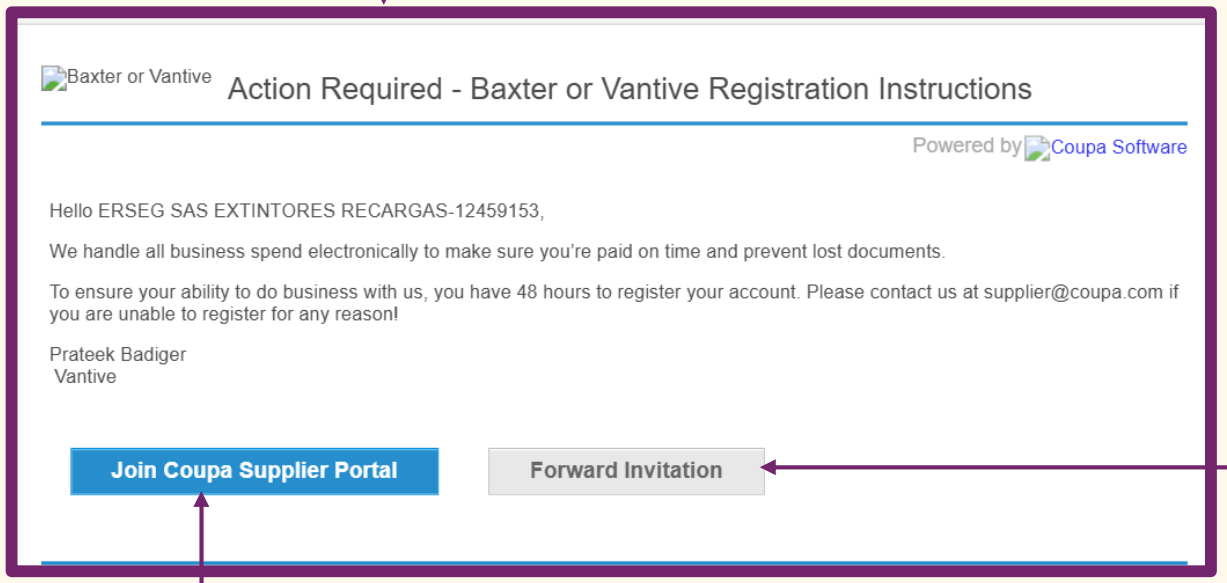
Suppliers should register if they do not have an existing account.

*Note! Vantive USERID is needed to access this portal

To submit a request, click on 'Procurement Case Request' and select Category (Coupa), Sub-category (Supplier Portal).

HOW TO ADD VANTIVE AS A CUSTOMER

Suppliers will receive an email with a link to login or register to the Coupa Supplier Portal.

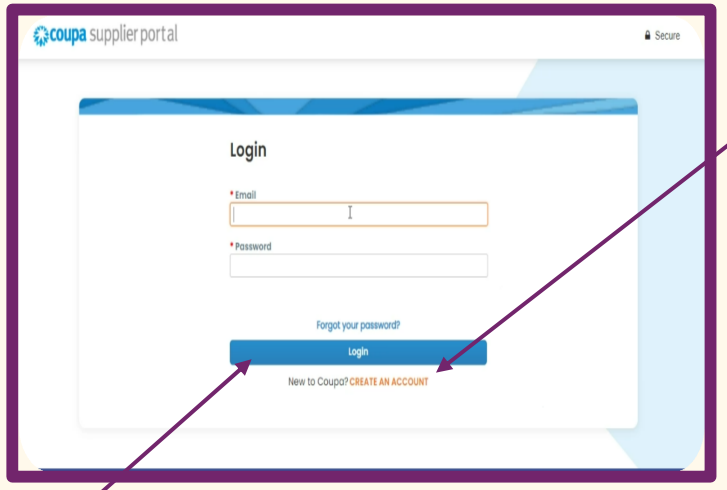


This link can be forwarded to other members in your company for registration.

Click 'Join Coupa Supplier Portal' to login or register.

HOW TO ADD VANTIVE AS A CUSTOMER

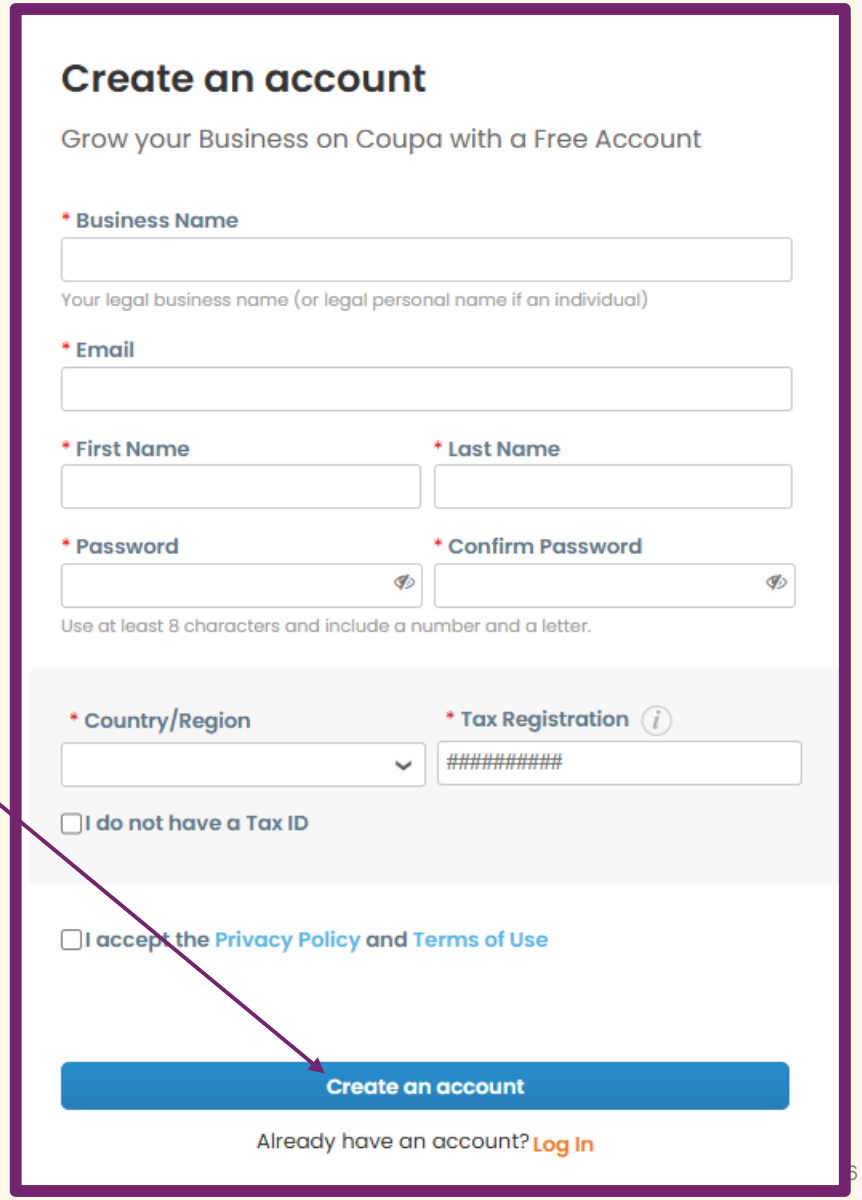
Use Coupa Supplier Portal link to initiate the registration or to login.



If you do not have an existing account, click on "Create an account" option to initiate the CSP registration.

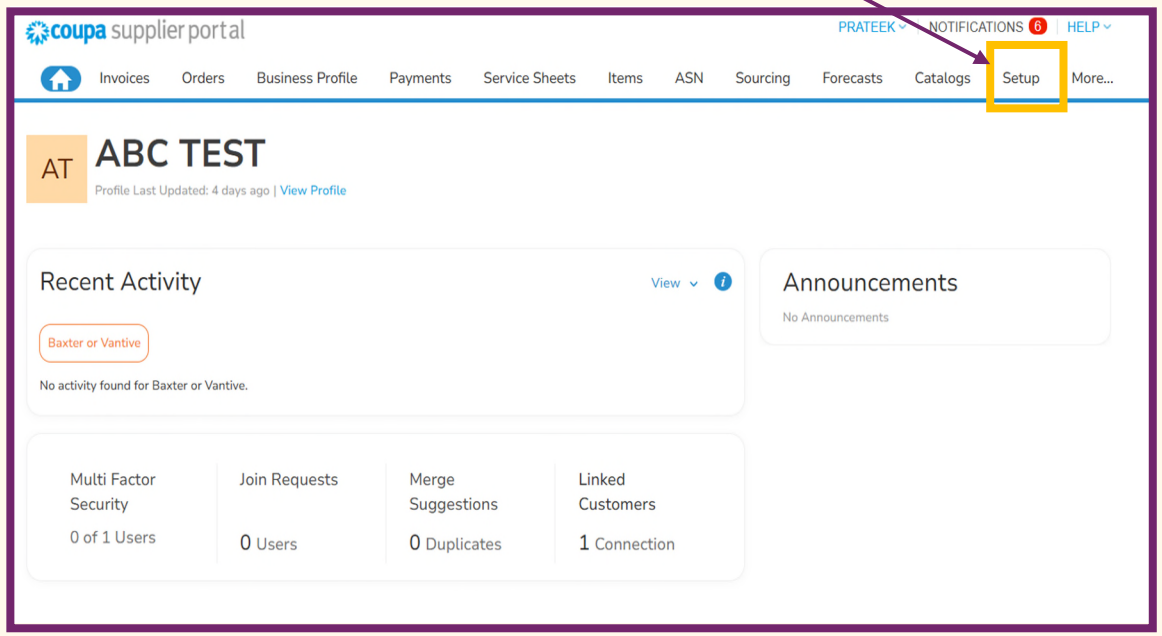
Enter all the mandatory fields and create your account.

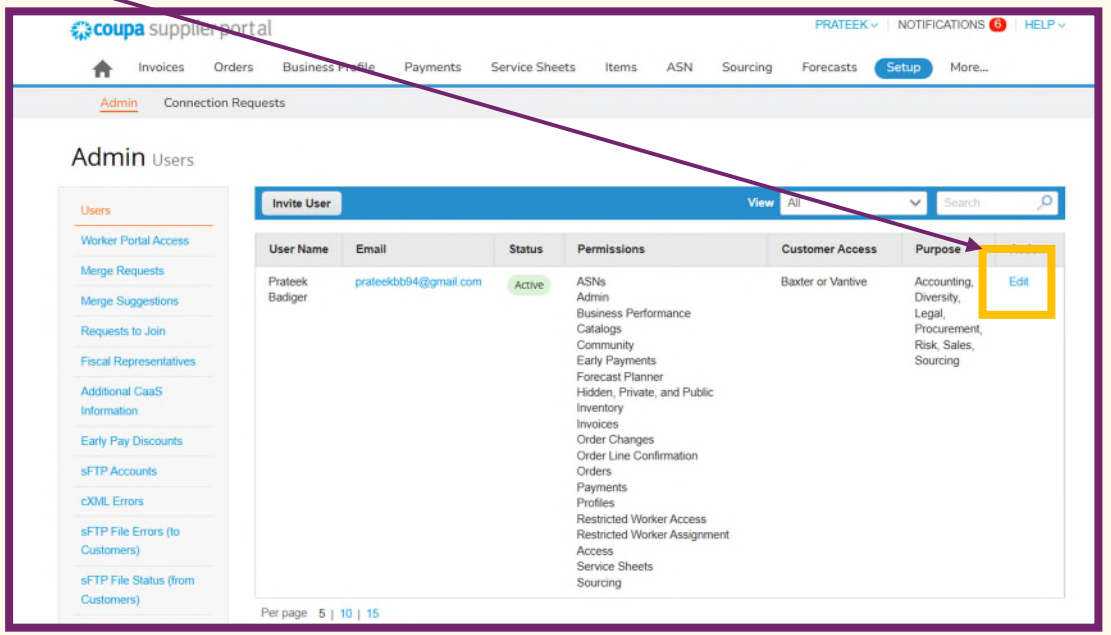
If you have an existing account on the CSP, use your login credentials.



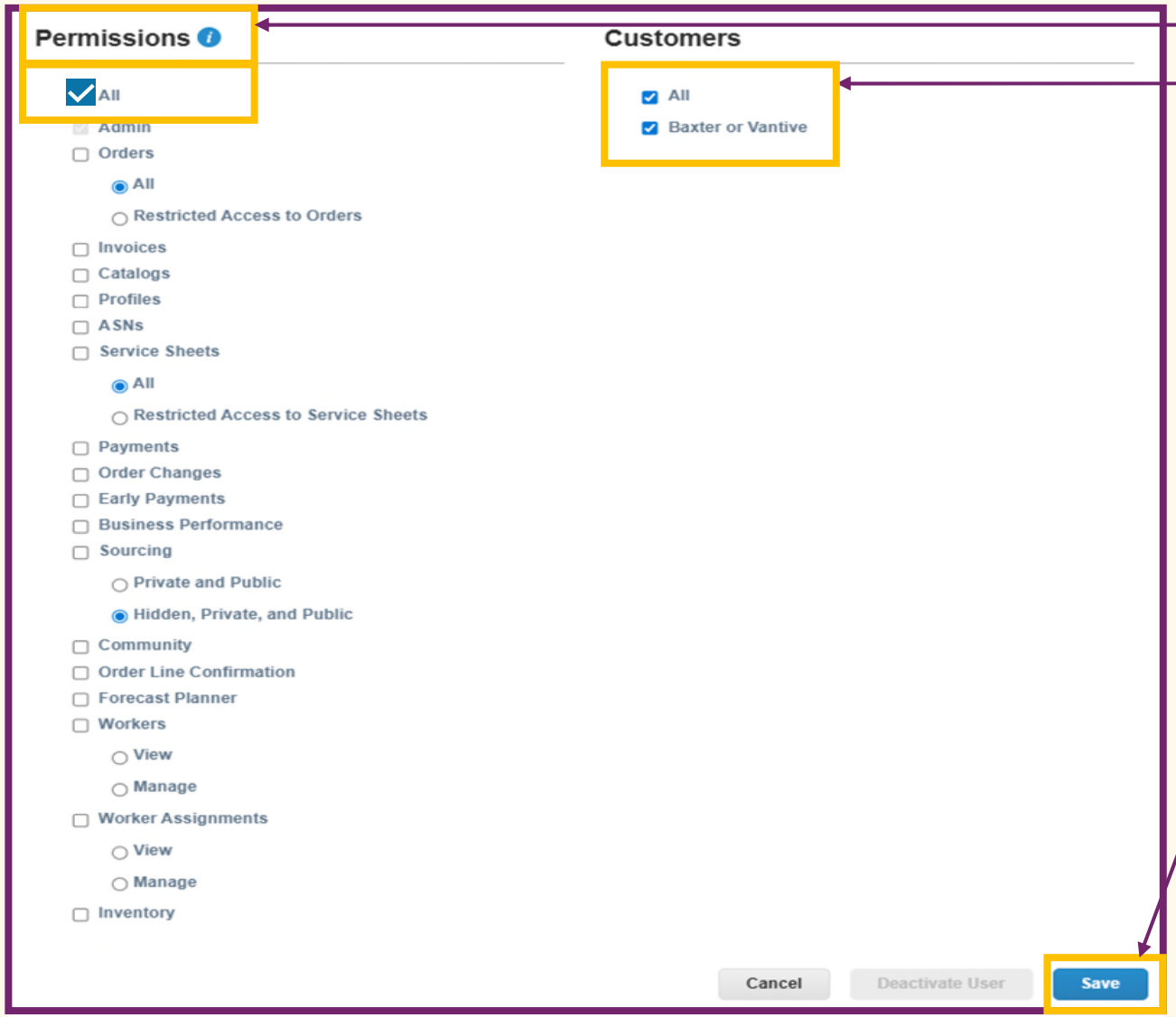
PERMISSION SET UP

This is where we must set our permissions to enable use to see Purchase Orders from Vantive.
In Coupa Supplier Portal select **Setup** and click on **edit** option on Vantive account





PERMISSION SET UP

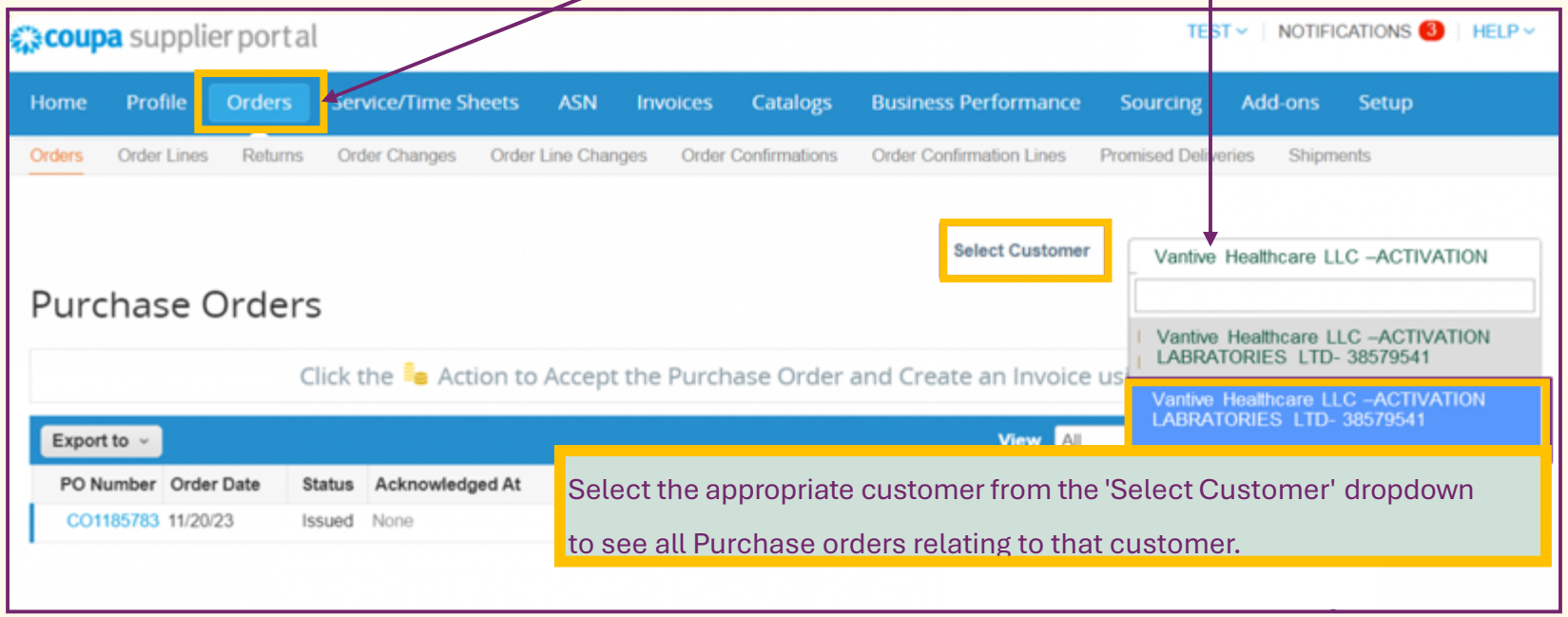


To make sure you have the correct permissions set up in the CSP, click '**All**' under '**Permissions**' and '**Customers**'.

Also make sure to click on **Baxter** or **Vantive** and **SAVE**.

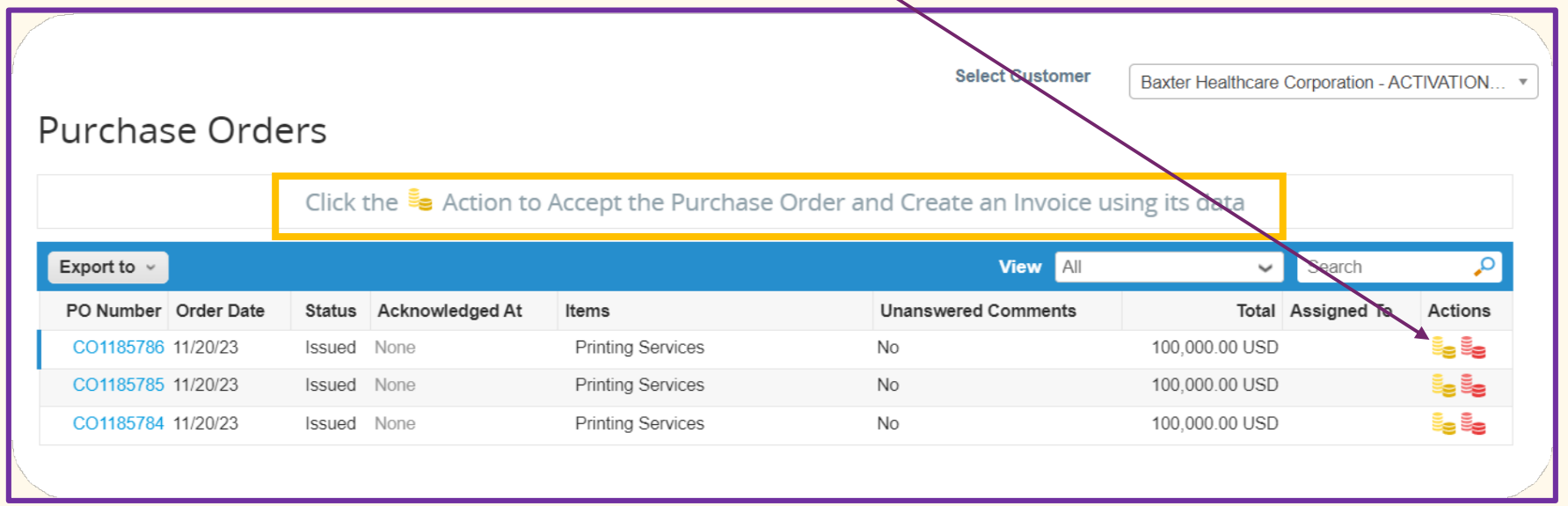
HOW TO VIEW PURCHASE ORDERS

Once successfully logged in to Coupa Supplier Portal Account, navigate to the '**Orders**' tab, and select the appropriate customer.



HOW TO SUBMIT AN INVOICE

To submit an invoice to Vantive on the CSP, suppliers must click here.



FAQ

How to Register ?

Steps	Action
Request a CSP Invitation from Vantive	Submit a ServiceNow ticket to the Procurement team to receive an invitation to the Coupa Supplier Portal. Please include the following details: • **Contact information**: Email address, First Name, and Last Name for sending the invitation. • **Verification details:** A past Purchase Order (PO) or Invoice number previously sent to Vantive to confirm your supplier record. Once these details are provided, the Experience Desk will send an invitation with a link to our CSP Vantive account. The link will expire after 48 hours. After activation, you will be able to view Vantive' s information on the portal.
Self-Register to CSP	Go to the Coupa Supplier Portal, and create an account, after this request to link your profile via ServiceNow .

Vantive Support Contact :

Team	When to Use?
ServiceNow	**You can raise a request for the following**: • Any CSP account issues or updates to contact information for the Coupa Supplier Portal. • Updating supplier information in our ERP or for new supplier creation. • Support with a Coupa Purchase Order (PO), such as when the requester is no longer at Vantive, or any other assistance related to PO transactions. • Issues related to invoices, such as an invoice on hold, voiding an approved invoice, or any other invoicing process concerns. • Updates to payment information, voiding an invoice, or other matters related to the Accounts Payable (AP) process.

How to Void an Approved Invoice?

You do not have the ability to Void/Reverse an Invoice on the CSP, this is only performed by our Accounts Payable Team.
See below reasons why you would request an invoice to be voided by the AP team:-

- Supplier booked the Invoice against the incorrect Purchase Order.
- The Invoice had the Incorrect Amount.
- Supplier has not yet delivered the Good/Services.
- The PO was cancelled by the Requester.

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FAQ

Preferred Invoice Channels by Vantive

Invoice Channel	Type	Description	When to Use?	How to Enable?
cXML Integration	Electronic	Supplier has an Invoicing platform available to process Invoice transactions	When the supplier has the capability for this type of integration, for example Catalog Suppliers	If a supplier wants to setup a new cXML Integration, please submit a **ServiceNow** request.
Coupa Supplier Portal	Electronic	The CSP is a free tool for suppliers to easily do business with customers who use Coupa, managing customers and transactions easy and allows supplier to create and submit Invoices to Vantive directly, and check the status of their transactions	Any supplier which does not have a cXML Integration available	The supplier can **register** into the CSP and contact our experience desk link to link their account to Vantive via **ServiceNow**.
Supplier Actionable Notifications (SAN)	Electronic	Allows them to act on POs directly from email notifications for POs created in Coupa, having the options to acknowledge, create an invoice from, or add a comment to a PO	When a supplier wants to action a notification. A Supplier can be on the CSP and still use SAN	Every supplier can action the email notification of the PO by clicking "Create Invoice"

For US Coupa Queries – Please email submit a **ServiceNow** request.

Thank You!