

# How to Navigate and Use the Coupa Supplier Portal (CSP)

Coupa



For the best learning experience, please click the **Editing** button and select **Open in Desktop** to view this document in your desktop application of Microsoft Word. Viewing this document in SharePoint or in-browser may distort the placement of images and text.

## Contents

- Purpose ..... 2
- Key Terms ..... 2
- How to Register for the CSP ..... 3
- How to Setup Your Company as a Legal Entity in the CSP ..... 10
- How to Manage Legal Entity in the CSP ..... 17
- How to Invite Users to the CSP ..... 20
- How to Manage Notification Preferences in the CSP ..... 24
- How to Submit Vendor Acknowledgment of Purchase Orders in the CSP ..... 25
- How to View and Search Purchase Orders in the CSP ..... 29
- How to Request a PO Change or PO Cancellation ..... 32
- How to Create an Advance Shipping Notice (ASN) in the CSP ..... 36
- How to Create Invoices in the CSP (Flipping a PO) ..... 38
- How to Create Invoices via Supplier Actionable Notification ..... 44
- How to View and Search Invoices in the CSP ..... 45
- How to Track the Status of an Invoice in CSP ..... 47
- How to Create a Credit Note in the CSP from Invoices ..... 50
- How to Create a Credit Note in the CSP from Order ..... 53
- How to View Payment Confirmation Details in the CSP ..... 56
- Additional Resources ..... 57



This icon indicates there are further policy or business process details relating to a step. Click on the provided link(s) placed throughout the QRC for more information.



Your screen in the Coupa Supply Portal may differ slightly from this training, but the steps to complete the activity will be the same.

### Purpose

This Quick Reference Card (QRC) explains the process for how Suppliers perform multiple tasks within the Coupa Supplier Portal such as configure Purchase Order (PO) transmission preferences, create online catalogs and electronic invoices and view Purchase Orders.

### Key Terms

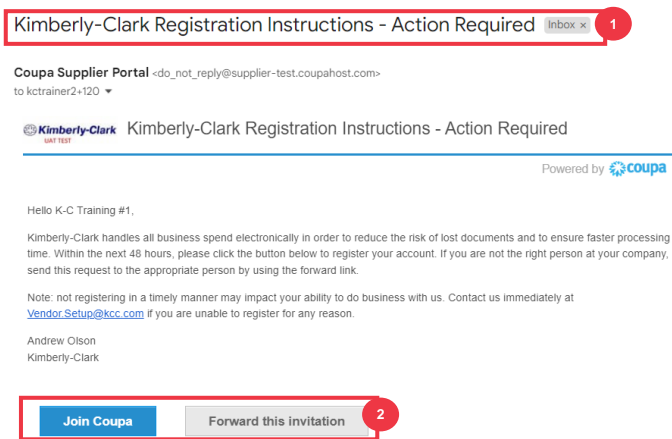
- The **Coupa Supplier Portal** is a web portal designed to assist suppliers in managing their business transactions with Kimberly-Clark (K-C).
- The **Advance Shipping Notice** is an electronically communicated notification of shipment of goods from suppliers to their customers.
- An **Invoice** is a billing document issued from suppliers to Kimberly-Clark stating the financial obligations owed for goods received or services performed.
- A **Disputed Invoice** is a billing document rejected by Kimberly-Clark to a supplier for readmittance of a new invoice.
- A **Credit Note** is an invoice submitted from a supplier to Kimberly-Clark with a negative value as an offer of credit or to resolve a disputed invoice.
- A **Purchase Order (PO)** is a commercial document issued by a buyer to a seller as a commitment to purchase goods or services in agreed upon types, quantities, and prices.

[Return to Table of Contents](#)

## How to Register for the CSP

Registering with Coupa Supplier Portal (CSP) will connect you to transacting with Kimberly-Clark. The steps below outline the preferred and only process K-C accepts to onboard suppliers through CSP.

1. You will receive an email invitation from K-C with the subject line: **Kimberly-Clark Registration Instructions – Action Required**
2. Click the **Join Coupa** button from the invitation email or Forward this invitation if you are not the right contact within your company



*\*Please note that the message you receive may be slightly different from the above screenshot*

*Please continue to the next page.*

- 3. You will need to go through 2 factor authentication:

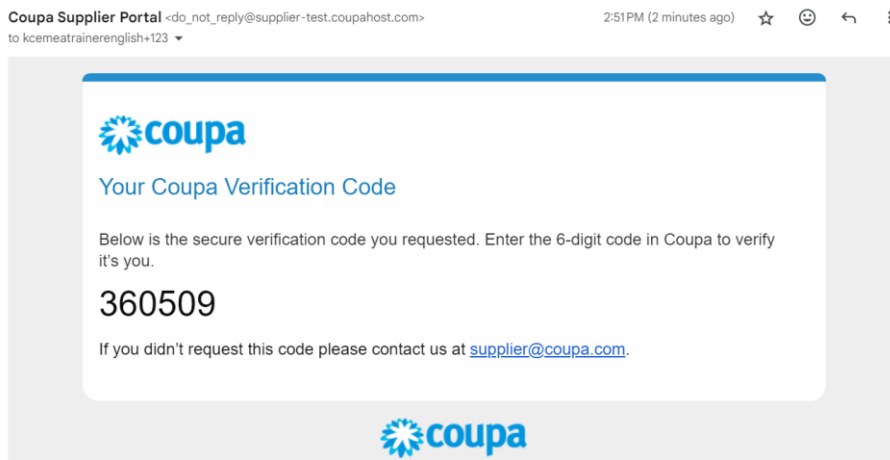
### Email Verification

We sent a one time verification code to  
kcemeatrainereenglish+123@gmail.com

Didn't receive the Verification Code? [Request a New Code](#)

**Next**

- 4. You will receive an email with a 6-digit code that should be copied and past into Coupa Supplier Portal



- 5. Enter the following information for the following fields (required fields are indicated by a red asterisk \*). Provide your, **Business Name**, **Email address**, **First Name** (primary contact), **Last Name** (primary contact), and **Password** (alphanumeric, minimum 8 characters)
- 6. Select the **Privacy Policy and the Terms of Use** checkbox (this is a requirement).



**Note:** The legal terms of use list the terms and conditions for using e-invoicing through Coupa and the CSP. You as a supplier, especially if you are responsible for managing legal tax invoices, are required to have read, assessed and agreed to these terms of use and to be aware of your responsibilities towards the content and handling of these invoices.

- 7. Click the **Create an Account** button when complete.
  - a. Click the **LOG IN** link (if you have an existing CSP account).

The screenshot shows a registration form with the following fields and elements:

- 3:** A red box highlights the main form area containing:
  - Business Name:** Text input with "Test supplier" and a subtext "Your legal business name (or legal personal name if an individual)".
  - Email:** Text input with "kcsupplierstest+1051@gmail.com".
  - First Name:** Text input with "John".
  - Last Name:** Text input with "Doe" and a dropdown arrow.
  - Password:** Password input field.
  - Confirm Password:** Password input field.
- 4:** A red box highlights the checkbox "I accept the Privacy Policy and the Terms of Use".
- 5:** A red box highlights the blue "Create an Account" button.
- 5a:** A red box highlights the link "Already have an account? LOG IN" with the subtext "Forward this to someone" below it.



**Note:** Your CSP account is based on a specific email address. If you use an email address different from the one that K-C has on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

Please continue to the next page.



**Note:** If you need translation assistance, Google Chrome and Microsoft Edge offer free translation browser extensions, however, it is your responsibility to ensure the information provided back to Kimberly-Clark is accurate

8. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk \*): **First and Last Name, Phone Number, Country/Region, Address, City, State, Postal code.**
9. Click **Next** button.

The screenshot shows a form titled "Your Contact Information" with a close button (X) in the top right corner. The form contains the following fields:

- \* First Name: SupplierName
- \* Last Name: Trainer
- \* Phone Number: [Empty text box]
- \* Country/Region: United States (dropdown menu)
- \* Address: 123 Main Street
- \* City: Houston
- \* State: Texas
- \* Postcode: 77092

Red boxes highlight the entire form area (labeled with a red circle containing the number 6) and the "Next" button (labeled with a red circle containing the number 7). Below the "Next" button is a link that says "Skip for Now".

*Please continue to the next page.*

- 10. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk \*): **Business Website, Tax ID**. Select **I do not have a website**, or **I do not have a Tax ID** if this is not applicable for your company.
- 11. Enter the following information about your business (required fields are indicated by a red asterisk \*): **DUNS Number**, if your company have Dun & Bradstreet DUNS Number.
- 12. Click **Next** Button.

**Tell Us About Your Business**

\* Business Website

  
 I do not have a website

\* Tax ID (or Local ID)

  
Tax ID is to confirm you are a real business. Individuals may use your Social Security number.  
 I do not have a Tax ID

DUNS Number

  
Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.

Next

Skip for Now

- 13. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk \*): **Year Established, Preferred Currency, Company Size, Business Description, Area of Service, Exclusion Areas**.
- 14. Click **Next** button.

**Customise Your Profile**

Year Established  Preferred Currency  Company Size

Business Description

  
Share a few words about your company.

Area of Service

Global  Regional

Add a region

Exclusion Areas

If you serve an entire region but there are a few exceptions, you can exclude them here (up to 5).

Add an exception

Next

Skip for Now

- 15. Choose your country.
- 16. Choose Diversity Categories applicable for your company.
- 17. Click **Next button**.

**Highlight Your Diversity Credentials**  
Diversity is a business advantage.

United States 13

Select Diversity Categories 14

[+ Add Country/Region](#)

Next 15

[Skip for Now](#)

- 18. Click **Upload** button to upload diversity certificates.
- 19. Click **Skip for Now** to bypass this step and upload your Diversity Certificates on a later stage.
- 20. Click **Next** button.

**Upload Diversity Certificates**  
(Certificates may be added later)

Economically Disadvantaged Female-Owned Small Business (United States)

Upload 16

Next 18

Skip for Now 17



- 21. Choose industry applicable for your company.
- 22. Choose categories of service that your company provides.
- 23. Click **Next** button.

### Identify Your Product Categories

Buyers search Coupa to find new suppliers like you.

**Industry**  
Select Industry 19

**Product and Service Categories**  
Select Categories 20  
Select the top 10 UNSPSC categories you serve.

**Next** 21

[Skip for Now](#)

- 24. Choose **Continue with Free** button.

### Get Verified to Grow Your Business

Verified profiles appear at the top of search results.

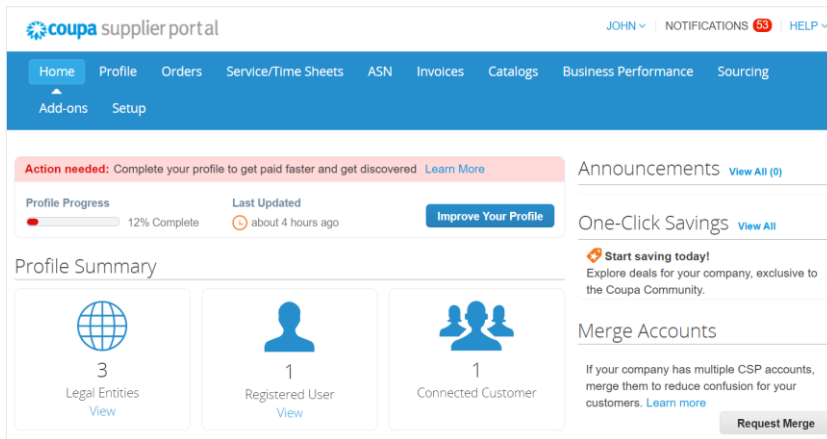
	Coupa Verified	Free
Searchable company profile	✓	✓
Catalogue management	✓	✓
Orders management	✓	✓
Invoices management	✓	✓
Payments management	✓	✓
Payment readiness via bank account verification	✓	✗
Prominent Verified badge on your company profile	✓	✗
Top of search on buyers' search results	✓	✗

**Continue with Coupa Verified** 46 USD per month

**Continue with Free** free forever

22

After a successful registration, you will be directed to the **Coupa Supplier Portal (CSP) homepage**.



[Return to Table of Contents](#)

## How to Setup Your Company as a Legal Entity in the CSP

In order to electronically invoice (either through CSP or via your actionable e-mail address provided during registration), your entity must be set-up as an established legal entity within CSP.

1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** subtab.



**Note:** K-C requires that Suppliers with multiple legal entities set up their additional entities within the Coupa Supplier Portal. Suppliers with only one (1) legal entity can bypass this process.

3. Select **Legal Entity Setup**.

coupa supplier portal JOHN | NOTIFICATIONS 63 | HELP

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

Add Legal Entity Setup

Admin Customer Setup Connection Requests

### Admin Users

Invite User

Users	Users	Permissions	Customer Access
<a href="#">Merge Requests</a> <a href="#">Legal Entity Setup</a> <a href="#">Fiscal</a> <a href="#">Representatives</a>	John Doe xcsupplierstest+11@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation	Kimberly-Clark

4. Click the **Add Legal Entity** button.

Admin Legal Entity Setup

Add Legal Entity

Legal Entity	Actions										
<table border="1"> <thead> <tr> <th>Invoice From</th> <th>Remit-To Accounts</th> <th>Locations</th> <th>TAX IDs</th> <th>Customers</th> </tr> </thead> <tbody> <tr> <td>P O BOX</td> <td>Address 1 customer</td> <td>P O BOX</td> <td></td> <td>Kimberly-Clark</td> </tr> </tbody> </table>	Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers	P O BOX	Address 1 customer	P O BOX		Kimberly-Clark	
Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers							
P O BOX	Address 1 customer	P O BOX		Kimberly-Clark							



**Note:** Proceeding with the following steps ensures that if you participate in electronic invoicing, you are submitting a tax compliant invoice.

- 5. Enter the official name and country of your business as registered with the local government (required fields are indicated by a red asterisk \*).
- 6. Click the **Continue** button.

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.

Cancel Continue

- 7. Select Kimberly-Clark from **Customers** checkbox. *All may also be selected.*
- 8. Enter the registered address and tax identification information for your business (required fields are indicated by a red asterisk \*).

Tell your customers about your organization

Which customers do you want to see this?

All

Kimberly-Clark

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country/Region

**REQUIRED FOR INVOICING**

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

- 9. Deselect your **Remit-To** and **Ship-From** address as needed.
  - a. Deselect the **Use this address for Remit-To** checkbox if you receive payment for invoices at a different address.
  - b. Deselect the **Use this for Ship From** address checkbox if you ship from a different address.

**Note:**



- **Remit-To** is the address where you want to receive payment (you can change this address should the need arise).
- K-C requires Suppliers to receive payment **only** via electronic form.
- **Ship-From** address is the address where you ship goods from (e.g., warehouse location)

- 10. Scroll down to the **Tax ID** section.
  - a. Select your tax country/region from the **Tax Country/Region** drop-down list.
  - b. Enter your **Tax ID** information.
  - c. If you do not have a Tax ID, select the **I don't have a Tax ID Number** checkbox).

- 11. If applicable, enter an appropriate value in the **Invoice From Code** field to connect your CSP invoice-from address (registered address) with the corresponding address in your ERP.
- 12. Click the **Save & Continue** button when complete.

- 16. In the next screen, select **Bank Account** from the **Payment Type** drop-down list.
- 17. Complete all applicable **Bank Account Details** fields.
- 18. Upload bank details **Supporting Documentation** (\* Required). Documentation must be in pdf file type.

- 19. Enter the **Bank Address** information.
- 20. Click the **Save & Continue** button.

What is your Bank's Branch Address?

Address Line 1: 555 West Hillsborough Ave  
Address Line 2:  
City: Tampa  
State: Florida - FL  
Postal Code: 33609

Who is your Remit-To Contact? (optional)

What is your Remit-To Address?

Address Line 1 5678 State St  
Address Line 2  
City Tampa  
State FL  
Postal Code 33608  
Country/Region United States

Cancel Save & Continue

The **Where do you want to receive payment?** screen appears with a summary of information you have provided.

- 21. Click the **Next** button.

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

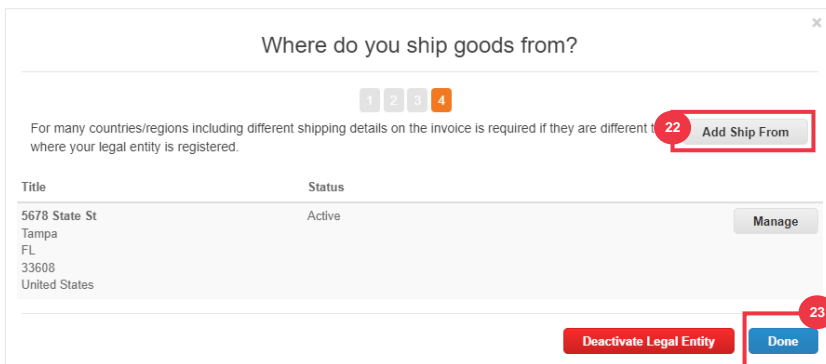
Remit-To Account	Remit-To Address	Status	
Bank Account Bank of Tampa *****6810 987654321	5678 State St Tampa FL 33608 United States	Active	Manage

Deactivate Legal Entity Cancel Next

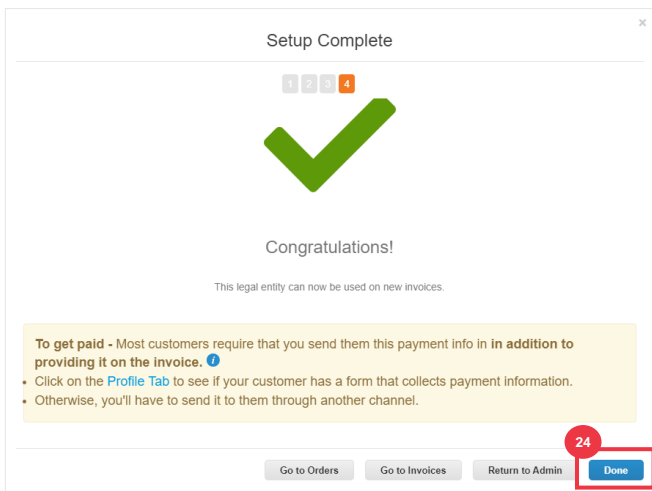


The **Where do you ship good from?** screen appears with a summary of information you have provided.

- 22. Click the **Add Ship From** button if you shipping detail are different from where your legal entity is registered.
- 23. Click the **Done** button.



- 24. Click the **Done** button.



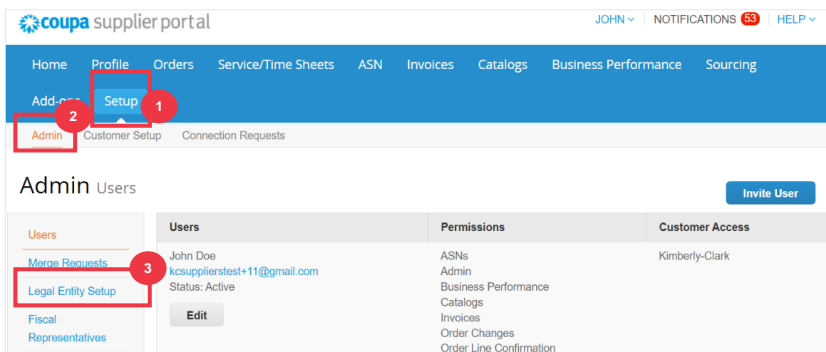
[Return to Table of Contents](#)



## How to Manage Legal Entity in the CSP

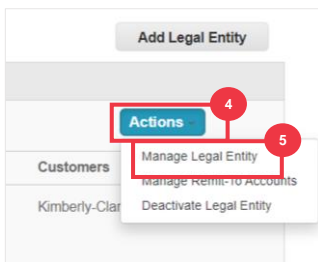
In order to electronically invoice (either through CSP or via your actionable e-mail address provided during registration), your entity must be set-up as an established legal entity within CSP.

1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** subtab.
3. Select **Legal Entity Setup**.



**Note:** The data you entered [during registration](#) will autofill these fields: Invoice From, Remit-To Accounts, Locations, Tax IDs, and Customers.

4. In the left corner, click the **Actions** button to manage the details of an existing Legal Entity.
5. Select **Manage Legal Entity** from the drop-down list.
  - a. Any updates needed to Manage Remit-to Accounts or to Deactivate Legal Entity can also be accessed from the **Actions** button.

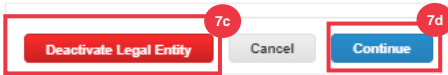


From here, you can edit the details that you originally entered. For details per each field, please see the [How to Setup Your Company as a Legal Entity](#) section in this document. Additionally, please see considerations below:

6. You can edit **Miscellaneous Information**.
  - a. You cannot change the **Name** or **Country/Region** associated to your legal entity in this process. If you need to amend these fields, you will need to deactivate the entity and set it up again.
  - b. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.
  - c. Click **Save & Continue**.

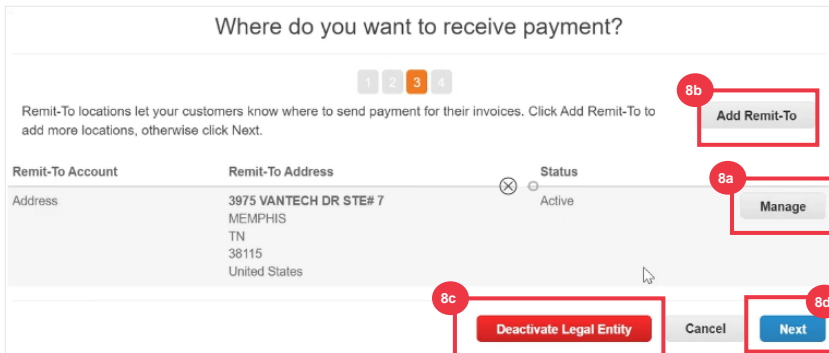
7. Edit your **customer** information.
  - a. If applicable, edit your selection in the **Which Customers do you want to see this** checkbox.
  - b. You cannot change the **Address** or **Tax ID information** associated to your legal entity in this process. If you need to amend these fields, you will need to deactivate the entity and set it up again.

- c. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.
- d. Click the **Continue** button.

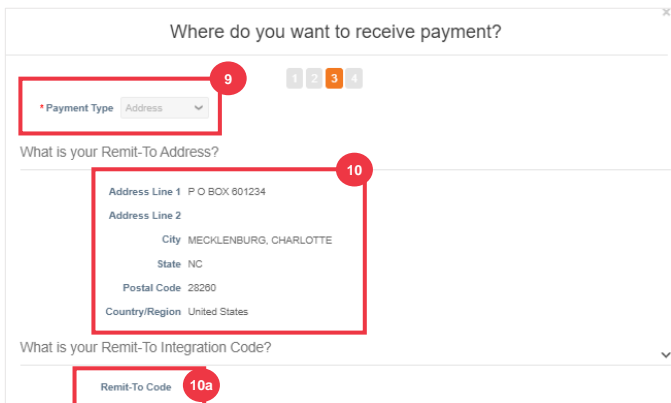


**8. You can edit Where you want to receive payment.**

- a. Click the **Manage** button to edit your existing remit-to address.
- b. Click **Add Remit-To** to add more locations.
- c. Click **Deactivate Legal Entity** if you need to deactivate your legal entity.
- d. Click the **Next** button.



- 9. Your **Payment Type** will not be editable. K-C only sends payment via electronic form. No payment will be sent in hard copy form.
- 10. Your main **Remit-To Address** will display. You can only maintain **ONE Remit -To address** connected to your **Payment Type**. Although, you can set up multiple Remit To addresses, K-C will only send payment to **ONE** designated **Remit-To address**.
  - a. Select the field to edit or add an existing **Remit-To Integration Code**.



11. You can add or edit existing **Contact Information**.
12. You can update **Which customers can use this account?**
13. You can also **Deactivate** a particular Remit-To address.
14. Click the **Continue** button.

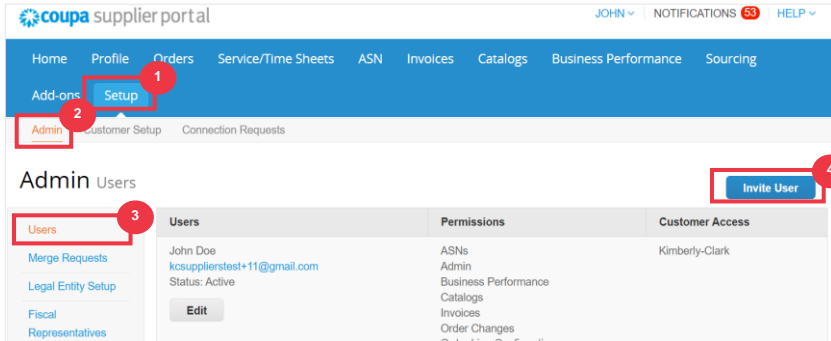
15. You can edit **Where you ship goods from**.
  - a. Click the **Add Ship From** to update your ship from address information.
  - b. Click the **Manage** button to edit your existing ship from address information.
  - c. If you wanted to, you could still **Deactivate the Legal Entity**.
  - d. Click the **Done** button.

[Return to Table of Contents](#)

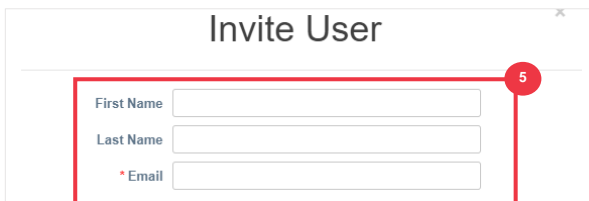
## How to Invite Users to the CSP

1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** tab.

3. Select **Users**.
  - a. You can review all users who are associated to your account on the **Users** screen.
4. Click the **Invite User** button.



5. The **Invite User** screen appears. Enter the invitee's contact information.



6. Define the **Permissions** (levels of access) for the invitee by selecting the following check boxes:
  - **All** (gives full access to all your CSP functions, except for user administration)
  - **Admin** (gives full access to all your CSP functions)
  - **Orders** (allows viewing and managing of Purchase Orders)
  - **Orders - Restricted Access** (allows accessing specific Purchase Orders)
  - **Orders - All** (allows viewing and managing of all Purchase Orders)
  - **Invoices** (allows creating and sending of invoices to customers)
  - **Catalogs** (allows creating and managing customer-specific electronic catalogs)
  - **Profiles** (allows modifying of customer-specific profiles).

**Note:** When a **supplier** is inviting another user from their organization to CSP, the **Profiles** checkbox **MUST** be selected. This allows the invited user to make edits and manage their company profile.

- **ASN** (allows creating and sending advanced ship notices (ASN) to customers)

- **Service/Time Sheets** (allows creating and submitting service/time sheets against Purchase Orders)
  - **Service/Time Sheets - Restricted Access to Service/Time Sheets** (allows accessing specific service/time sheets)
  - **Service/Time Sheets – All** (allows creating and submitting any service/time sheets against Purchase Orders)
  - **Payments** (allows viewing payments and downloading digital checks)
  - **Order Changes** (allows submitting PO change requests)
  - **Pay Me Now** (Available only if your customers use Coupa Pay and enabled the feature related to this permission)
  - **Business Performance** (allows viewing business performance information, e.g., order, invoice and delivery trends)
  - **Sourcing** (allows viewing public sourcing events)
  - **Order Line Confirmation** (allows viewing of Purchase Order lines within ASN)
7. Define which **Customers are visible** to the invitee by selecting the following check boxes:
- a. **All** (allows viewing of all customers within your CSP)
  - b. **Kimberly-Clark** (allows viewing of only K-C within your CSP)
8. Click the **Send Invitation** button.

The screenshot shows a user interface for configuring permissions and customer visibility. It is divided into two main sections: 'Permissions' and 'Customers'. The 'Permissions' section (6) contains a list of permissions with checkboxes. The 'Customers' section (7) contains a list of customer groups with checkboxes. At the bottom of the interface, there are two buttons: 'Cancel' and 'Send Invitation' (8).

Section	Item	Selected
Permissions (6)	All	Checked
	Admin	Checked
	Orders	Checked
	Restricted Access to Orders	Not Selected
	All	Selected
	Invoices	Checked
	Catalogs	Checked
	Profiles	Checked
	ASNs	Checked
	Service/Time Sheets	Checked
	Restricted Access to Service/Time Sheets	Not Selected
	All	Selected
	Payments	Checked
	Order Changes	Checked
	Pay Me Now	Checked
	Business Performance	Checked
	Sourcing	Checked
Order Line Confirmation	Checked	
Customers (7)	All	Checked
Customers (7)	Kimberly-Clark	Checked

Once a new user has accepted the invitation, they will appear within the **Users** table (Step 3). New users can be [delegated tasks](#) within the CSP such as completing the **Supplier External Form** and or any **due diligence questionnaire (DDQ)**.

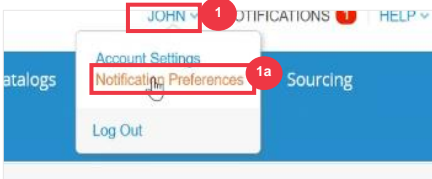
[Return to Table of Contents](#)

*Please continue to next page.*

## How to Manage Notification Preferences in the CSP

Through Coupa Supplier Portal (CSP), you can receive notifications for a variety of preferences, including (but not limited to) canceled digital checks, virtual cards and created receipts.

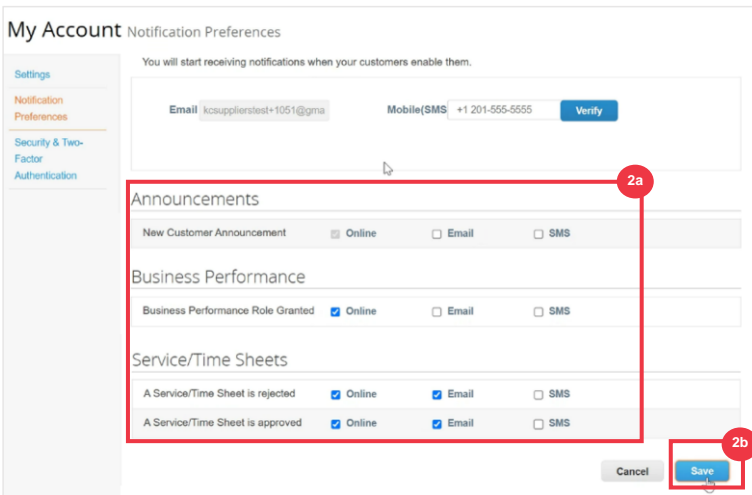
1. From your **CSP Home** screen, hover over **Your Name**.
  - a. Select **Notification Preferences**.



2. Manage your **notification preferences**.
  - a. Select **how** you would like to be notified (e.g., **online**, **email** or **SMS**) by **selecting the check boxes** from the corresponding notification areas (e.g., announcements, business performance, service/time sheets).
  - b. Click **Save**.



**Note:** There are three types of notifications: **Announcements** (information communicated from your customers), **Business Performance** (summary of your orders and invoices, year-to-date order and invoice trends and lead time to shipping goods), and **Service/Time Sheets** (list of service/time sheets and related Purchase Order lines).



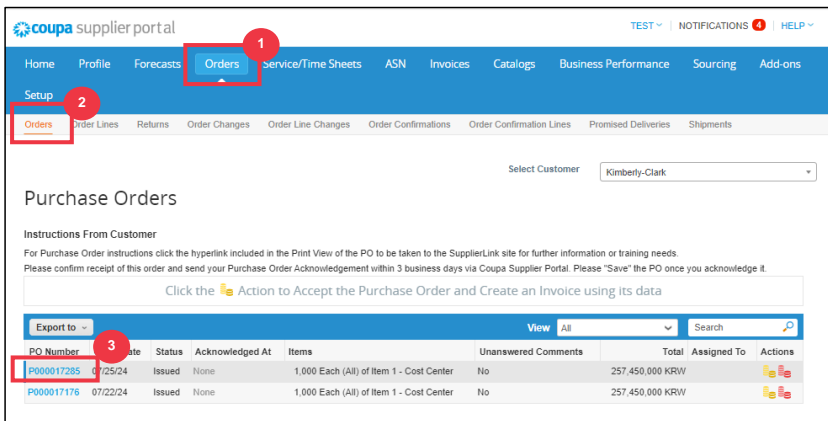
[Return to Table of Contents](#)



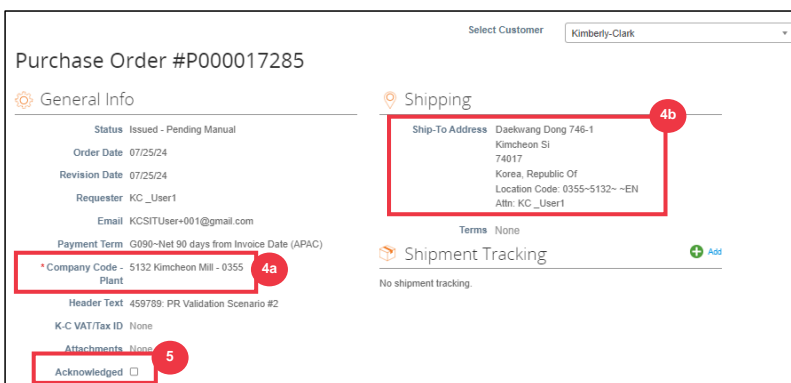
## How to Submit Vendor Acknowledgment of Purchase Orders in the CSP

**Vendor Acknowledgement** within Coupa allows you to select a single checkbox to indicate that you have properly received a K-C PO.

1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Click the **PO Number** hyperlink to open a PO.



4. Review the following information on the PO:
  - a. **Company Code Plant**
  - b. **Ship-To Address**
5. Select the **Acknowledged** checkbox to acknowledge receiving the PO.



6. Scroll to the end of the **Lines** section and click the **Save** button.

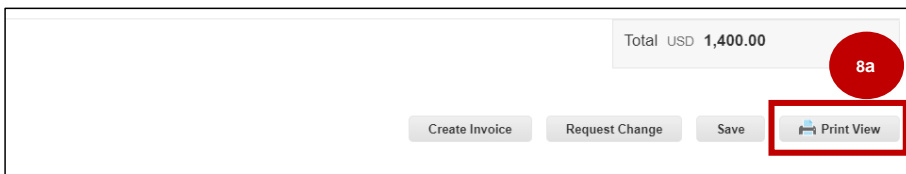
7. You will receive an **Order acknowledged** notification.

The K-C Terms & Conditions as well as relevant PO Delivery and Invoicing instructions can be seen on the PO Output Form.

Commented [KD1]: New section added

- 8. To see the details, follow below instructions:
  - a. Click on “**Print View**” button.
  - b. Printable version of the PO will be displayed.
  - c. At the bottom of the form, you will see several links. To view **Terms & Conditions** click on the link above.
  - d. To view **PO delivery and invoicing instructions** click on the link at the bottom of the form.

To view Coupa Training Materials as well as any Kimberly-Clark’s Source to Pay relevant information go to Supplier Link: [Source to Pay Process](#).



kimberlyclark-test.coupa.com/order\_headers/print\_view?id=1973&version=1 - Work - Micr...
8b

https://kimberlyclark-test.coupa.com/order\_headers/print\_view?id=1973&version...

Print Email
Remove frame Close

**PAUL & CO PAPIERHUELSEN**  
 0010000181-EMEA  
 POSTFACH 1165  
 WILDFLECKEN, 97770  
 Attn: Roy Dev  
 kcsupplierstest+4000@gmail.com

SHIPPING TERMS: DAP-Delivered at Place  
 CURRENCY: EUR  
 translation missing: 3928  
 en.REQUISITION NUMBER  
 translation missing: en-K-C VAT ID  
 PLANT: 3324 Christian Kluth RDC (3324) - 0677

**Ship To**  
 Kimberly-Clark Corp  
 Kohnacker 231  
 Dornagen, 41542  
 0677-3324-9000-EN  
 Attn: Yoganand Agnihotram

**Bill To**  
 Kimberly-Clark Corp  
 Walton Oaks, Dorking Road  
 Tadworth, Surrey KT20 7NS

Line	Description	Need By Date	Self Billed by KC	Inco Terms 2	Contract Details	Manufacturer Details	Service Start Date	Service Recipient	Qty	Unit	Price	Total
1		10/21/23	No	Mill Address			10/25/23	Santosh Mounya			5,000.00	5,000.00
											<b>5,000.00 EUR</b>	

Acceptance of this purchase order is expressly made conditional on acceptance without reservation of the terms and conditions of this purchase order including Kimberly-Clark's General Terms and Conditions located at the following link that are incorporated herein:

[Links to Purchase Order Terms & Conditions\\_10.2022.xlsx \(sharepoint.com\) \(LINK TO BE UPDATED\)](#)

**8c**

**PO Instructions:**

Keys to Success: Verify Items and Pricing are correct | Spot Check ship-to location for accuracy in your system | Review due date to ensure you deliver on-time | Acknowledge Purchase Order | Process Purchase Order on your end | Create Invoice.

Acceptance required via Procure-to-Pay Portal [Procure-to-Pay Portal \(kimberly-clark.com\)](#)

Purchase Order, Delivery and Invoicing instructions requirements can be found under Supplier Link ([Source-to-Pay Process \(kimberly-clark.com\)](#))

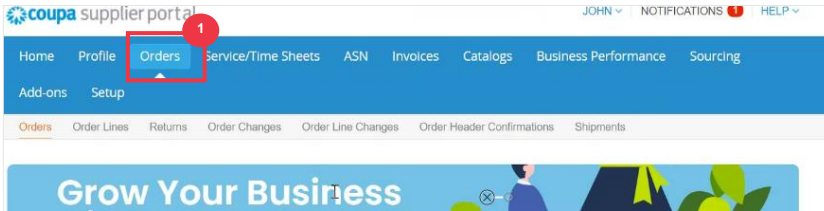
**8d**

Commented [KD2]: To be updated once PO layout for APAC is available in Coupa UAT

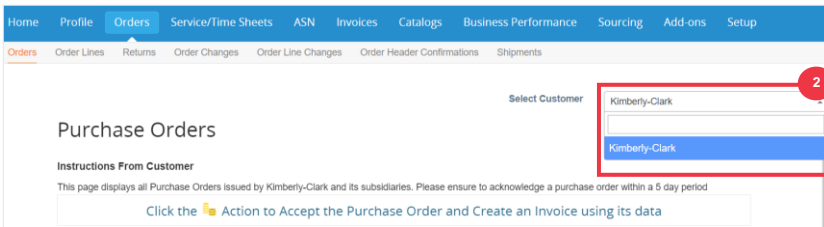
[Return to Table of Contents](#)

## How to View and Search Purchase Orders in the CSP

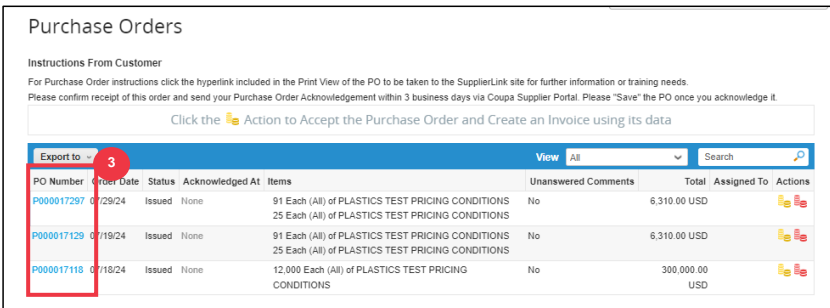
1. From your **CSP Home** screen, select the **Orders** tab.



2. Select **Kimberly-Clark** from the **Select Customer** drop-down list.

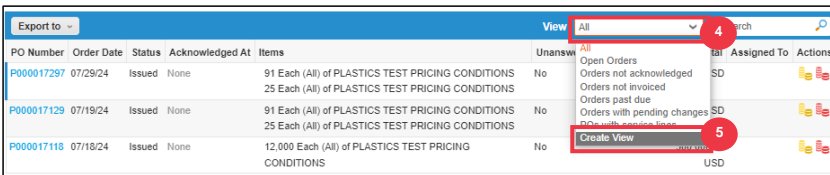


3. In the **Purchase Orders** table, search for a PO using the **PO Number** column and clicking the desired PO number.



4. Click the **View** drop-down list to filter your search for Purchase Orders from the standard set of views available.

5. Select **Create View** to personalize your column display fields.



6. Enter a **Name** for your view.
7. Select the **Visibility** for your view. Choose from the following:
  - a. **Only me** (view is visible by only you)
  - b. **Everyone** (view is visible by all other users)
8. Select your **Start with view** field (use this option to load the settings from another view, and then modify those settings to fit your needs for this view).
  - Available options include: **All, Open Orders, Orders Not Acknowledged, Orders Not Invoiced, Orders Past Due, Orders with Pending Changes, POs Pending Rework, and POs with Service Lines.**
9. Click the **Match Conditions** drop-down list to apply conditions to your view based on data available in the CSP.

The screenshot shows the 'Create New data table view' interface. It is divided into two main sections: 'General' and 'Conditions'. In the 'General' section, there is a 'Name' text input field (callout 6), a 'Visibility' section with radio buttons for 'Only Me' (selected) and 'Everyone' (callout 7), and a 'Start with view' dropdown menu currently set to 'All' (callout 8). The 'Conditions' section features a 'Match Conditions' dropdown menu set to 'Match all conditions' (callout 9), an 'Add group of conditions' button, and a filter configuration row with 'Filter By' set to 'PO Number', 'Filter Clause' set to 'is', and a 'Filter Text' input field.

10. Click-and-drag the data points from (10a) **Available Columns** field for to (10b) **Selected Columns** to display.
11. Define the **Default Sort Order** (use this option to sort the result sets from your view in ascending or descending order).
12. Click the **Save** button.

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.

**10a** Available Columns

- Comments
- Company Code - Plant
- Payment Agreements
- PO ID

**10b** Selected Columns

- PO Number
- Order Date
- Status
- Acknowledged At
- Items
- Unanswered Comments
- Total
- Assigned To
- Actions

**11** Default Sort Order

Sort by  in  ascending  order.

**12**

[Return to Table of Contents](#)

## How to Request a PO Change or PO Cancellation

1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Click the **PO Number** hyperlink to open a PO.

Home Profile **Orders** 1 Invoice/Time Sheets ASN Invoices Catalogs Business Performance Sourcing

Add-on 2 Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Header Confirmations Shipments

Select Customer Kimberly-Clark

### Purchase Orders

**Instructions From Customer**  
This page displays all Purchase Orders issued by Kimberly-Clark and its subsidiaries. Please ensure to acknowledge a purchase order within a 5 day period  
Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to View Open Orders Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
C00000070	9/23	Issued	None	50 Each (All) of PO Mass Change_FUT 50 Each (All) of PO Mass Change_FUT	No	1,500.00 USD	

4. The **Purchase Order** will open with all details. Scroll to the **Lines** section of the PO.
  - a. Click the **Request Change** button.

**Lines** 4

Advanced Search Sort by Line Number: 0 - 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		PO Mass Change_FUT	50	Each (All)	10.00	500.00	0.00
<p>* Need By 01/25/23 Part Number None Manufacturer Name None Manufacturer Part Number None Self Billed by KC? No Inco Terms 2 Shipping Point Taxable Yes</p> <p>Service Start Date None</p>							
2	Type	Item	Qty	Unit	Price	Total	Invoiced
		PO Mass Change_FUT	50	Each (All)	10.00	500.00	0.00
<p>* Need By 01/25/23 Part Number None Manufacturer Name None Manufacturer Part Number None Self Billed by KC? No Inco Terms 2 Shipping Point Taxable Yes</p> <p>Service Start Date None</p>							

Per page 15 | 45 | 90

Total USD 1,000.00

Create Invoice **Request Change** 4a Save Print View



5. The **PO Lines** section becomes editable.
6. In the **PO Lines** section, make the desired edits to either of the following fields:
  - a. **Need By**
  - b. **Quantity**
  - c. **Price**
  - d. **Line Delete** (click the red X to delete the entire line)

Type	Item	* Qty	Unit	* Price	Total
1	PO Mass Change_FUT	50	Each (All)	10.000000	500.00

\* Need By: 01/20/23

Self Billed by KC?: No    \* Inco Terms 2: Shipping Point    Taxable: Yes    Service Start Date: None

7. Select a reason for change from the **Reason for Change** drop-down list.
  - a. Select **Other** to activate and type a reason.

\* Reason for Change

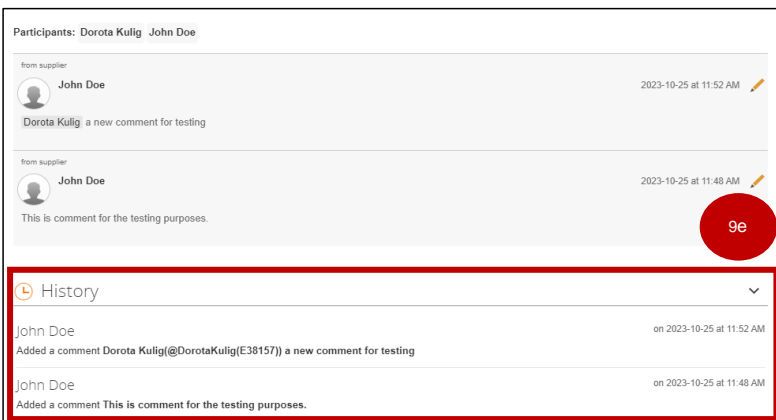
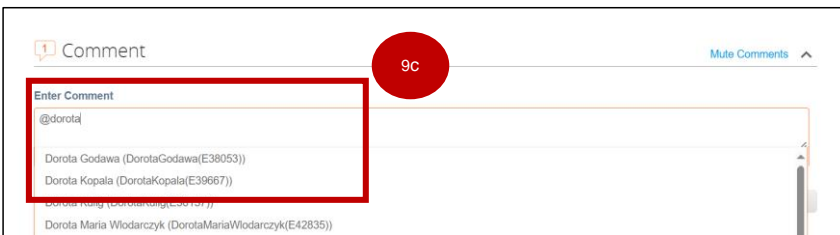
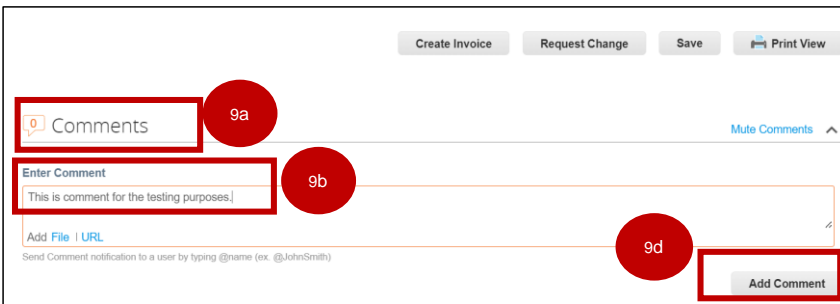
- Cannot fulfill order quantity/amount
- Cannot fulfill orders by the Need-by date
- Other

8. Choose one of the following:
  - a. Click the **Submit Change Request** to submit.
  - b. Click the **Save Change Request** button to save changes but not submit the request.
  - c. Click **Request PO Cancellation** to cancel the entire PO.

Request PO Cancellation    Save Change Request    Submit Change Request

Also, there is a field "Comments" which can be freely written. At the bottom of the page, changes or comments to the order can be viewed at any time under "History".

- 9. To leave a note for the customer:
  - a. Scroll down to the **Comments** section.
  - b. Type in a note, you would like to leave for the customer to see.
  - c. You can **@mention** specific users in the comments section of Coupa documents so they'll get a notification when they've been mentioned in a comment.
  - d. Click on "Add Comment" button to save the note.
  - e. You can view comments added at any time in the "History" section.





**Note:** K-C will review the change request or cancellation request and send notification of acceptance or denial. You will receive an updated PO from K-C and you will still have the ability to submit other invoices.

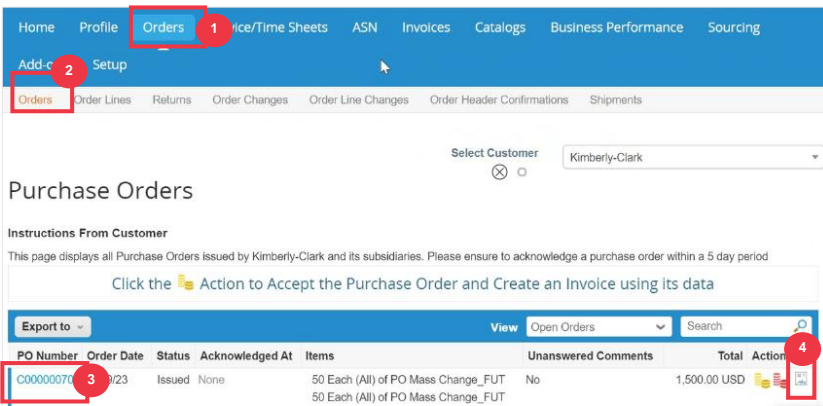
[Return to Table of Contents](#)

## How to Create an Advance Shipping Notice (ASN) in the CSP

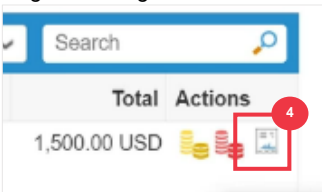
Commented [KD3]: Not relevant for EMEA  
Commented [KD4R3]: Not relevant for APAC

Coupa Supplier Portal allows you to send **advance notice to your customers about when you ship items (ASNs)**. ASNs are not an expected requirement for transacting within Coupa with Kimberly-Clark.

1. From your **CSP Home** screen, select the **Orders** tab.
2. Click the **Orders** subtab.
3. Identify the Purchase Order for which you would like to create an ASN.
4. Select the **Flip to ASN** icon.



Magnified image:



Please continue to the next page.

5. Enter the details for the ASN in the following sections:
  - a. **ASN #**
  - b. **Ship To** (this address will autofill from the PO)
  - c. **Shipping Info**



**Note:** You will need to provide K-C with your ASN numbers for related shipments or those ASNs that are provided to you from third-party logistics (3PL) companies.

Create Advance Ship Notice

**General Info**

\* ASN # 5a

Status: Draft

UOM

Gross Weight

Ship Date: mm/dd/yy

Expected Delivery Date: mm/dd/yy

**Ship To**

Ship To Warehouse

Ship to Address: 1400 Holcomb Bridge Road  
ROSWELL, GA 30076-2190  
United States  
Location Code: 0008-2234-NF01

Ship to Attention: Pranav Garg 5b

**Shipping Info**

Tracking Number 5c

Carrier

Shipping Method

Standard Carrier Alpha Code

Container

Trailer

6. Enter any **Comments** to K-C (if applicable).
7. Click the **Submit** button.

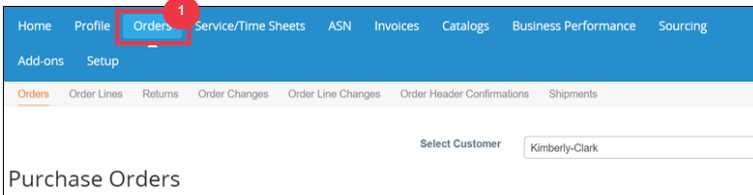
Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty	Supplier AUX Part Number
				None
<b>Match Reference</b>				
None				
<b>Comments</b>				
<div style="border: 1px solid red; border-radius: 5px; padding: 5px;"> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">6</span> </div>				
				<div style="display: flex; justify-content: flex-end; gap: 10px;"> <span>Cancel</span> <span>Save</span> <div style="border: 1px solid red; border-radius: 5px; padding: 2px;"> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">7</span> </div> </div>

[Return to Table of Contents](#)

## How to Create Invoices in the CSP (Flipping a PO)

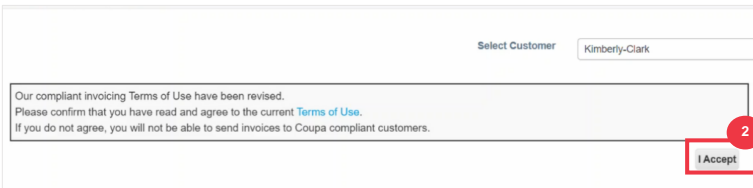
The CSP allows you to quickly transfer a PO into an invoice (i.e., flip a PO) and send to your customers.

1. From your **CSP Home** screen, select the **Orders** tab.

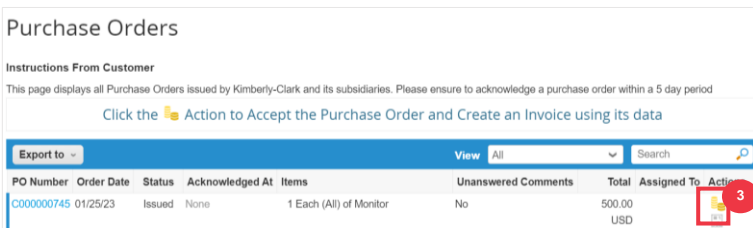


**Note:** If this is your **first-time** invoicing **Kimberly-Clark**, you will need to accept the Coupa Supplier Portal's updated Invoicing Terms of Use before continuing.

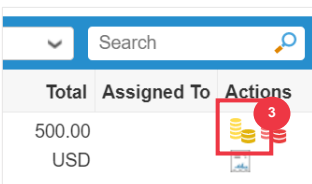
2. Click the **I Accept** button (if applicable).



3. In the **Actions** column of the PO you want to create an invoice for, click the **Gold Coins** icon.




Magnified image:



4. Define the **Invoicing Details**.
  - a. Select the **Legal Entity** drop-down lists and choose your legal entity.
  - b. The information for the **Invoice From, Remit-To and Ship From Address** fields will autofill with the address details that are associated to your legal entity after it is selected.
5. Click the **Save** button.

6. Enter the invoice number in the **Invoice #** field.
7. Select an **Invoice Date**. The **Invoice Date** must be within 7 calendar days of the current date.
8. The following fields autofill from the PO: **Payment Terms, Currency, Supplier, Invoice From Address, Remit-To Address, Ship From Address**.

- 9. Click **Choose File** to attach an original copy of the invoice. This field is available for selective counties and you might not have this option to attach an original copy of invoice.

 **Note:** The attached invoice, provided as an image scan, is intended for supporting document purposes only. Kimberly-Clark will process payments based on the data generated by Coupa. It is crucial that you meticulously review all details to ensure they correspond with the original invoice. Only after confirming the accuracy of these details should you submit it for payment processing. Failure to adhere to this request may result in a delay in payment

- 10. Click **File** and **Browse** button to attach supporting documents.

Image Scan **Choose File** No file chosen


Supplier Note  \* Ship

Attachments *i* Add **File** | URL | Text

Cash Accounting Scheme **Browse** *i* X

Margin Scheme  Tc

\* Exchange Rate *i*  \* r

 **Note:** If the file size is more than **20MB**, the **invoice will be disputed**. Once invoice is disputed due to attachment size, discard disputed invoice and resubmit invoice with resized attachment.

- 11. Scroll to the **Lines** section and edit the details for the invoice lines in the following fields (if applicable):
  - a. **Description**
  - b. **Quantity (Qty)**
  - c. **Supplier Part Number**
  - d. **Withholding Tax if applicable**
  - e. **NCM Code or UNSPC** (8-digit code that defines any goods that circulate in Mercosur countries)



Lines 11

Type	Description	Qty	UOM	Price	
	PO Ack Test	50	Each (All)	10.00	500.00

PO Line C00000804-1    Service/Time Sheet Line None    Contract    Supplier Part Number

Self Billed by KC? No    Inco Terms 2 Shipping Point    UNSPC    Withholding Tax

Taxable Yes    NCM Code Select

1-0071710000-0008-0000084752-0008

12. Scroll down to the **Totals & Taxes** section and **apply any other header level costs** associated to the PO (e.g., shipping and/or handling tax or any other miscellaneous charges) if applicable. If not applicable, leave the fields blank without amount and tax rate.
13. Click the **Calculate** button to verify the total amount of the invoice.
14. Click the **Submit** button.

Totals & Taxes 12

Lines Net Total 5,000.00

Shipping 100.000

Tax SA E - Exempt from Tax - 0.0% % 0.000  
SA O - Services or supplies not subject to VAT - 0.0%  
 SA S - Standard rate - 15.0%  
 SA Z - Zero Rate Goods - 0.0%

Handling

Tax % 0.000

Misc

Tax % 0.000

Tax 0.000 % 0.000

Total Tax 0.00

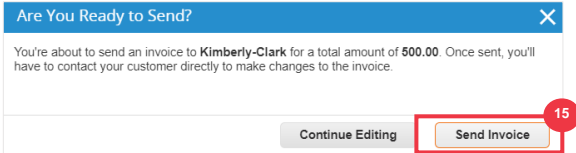
Net Total 5,100.00

**Total 5,100.00**

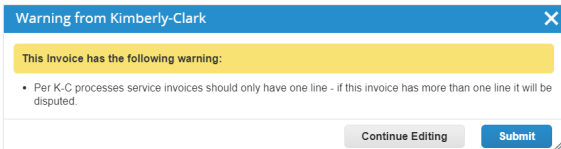
13 14

Delete Cancel Save as Draft **Calculate** **Submit**

15. Click the **Send Invoice** button to issue the invoice.

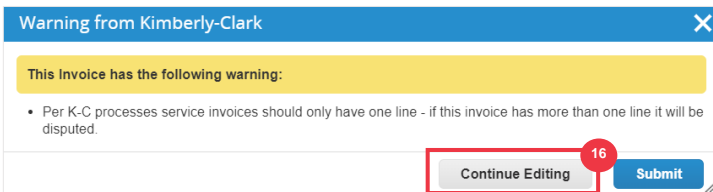


Per Kimberly-Clark processes, **Service Invoices can only have one line. Service Invoices with more than one line will be disputed (Applicable to suppliers for K-C North America only).** If you receive this warning (pictured below), please complete the following:

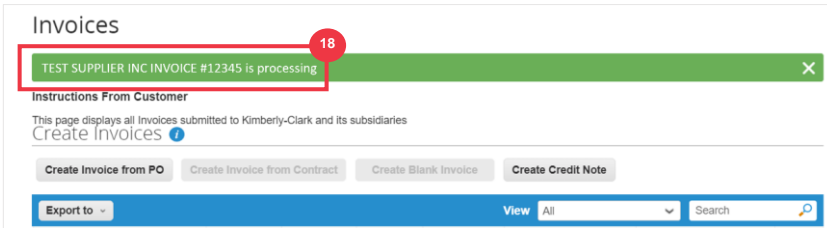



16. Click the **Continue Editing** button to adjust your Service Invoice to contain only **one** line. Please see **Steps 4-14** for full details on creating an invoice.

17. After you have edited the details, you will proceed to **Step 15** to properly **Send Invoice**.



18. You will receive a confirmation banner that your **Invoice is in processing**. The invoice is now [linked and visible](#) within CSP.



 **Note:** Before sending the invoice to Kimberly-Clark, it is **imperative** that you meticulously **review all details** to ensure they match the original Invoice. Only after confirming accuracy should you submit it for payment processing. Failure to follow this request may **result in delayed payment**.



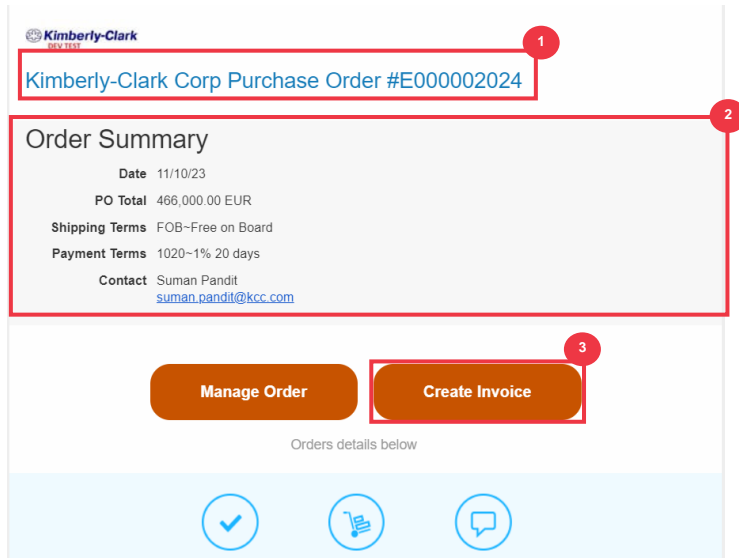
**Note:** For **Europe, Middle East and Africa** specific invoice and credit note submission requirements please visit the following link : [EMEA Invoicing Requirements](#)

**Note:** For **APAC** specific invoice and credit note submission requirements please visit the following link : [APAC Invoicing Requirements](#)

[Return to Table of Contents](#)

## How to Create Invoices via Supplier Actionable Notification

1. When Kimberly-Clark places an order, you'll receive an email notification from Coupa. This notification contains details about the purchase order.



2. Open the email and **review the PO details**. Ensure that it aligns with the invoice you want to create in your ERP system.
3. Click the “**Create Invoice**” button within the email notification. You'll be prompted to select invoicing details same as Coupa Supplier Portal
4. After creating the invoice, review the entries you've made. If everything looks correct, click “**Submit**.”
5. An **Invoice Overview** screen appears same as Coupa Supplier Portal



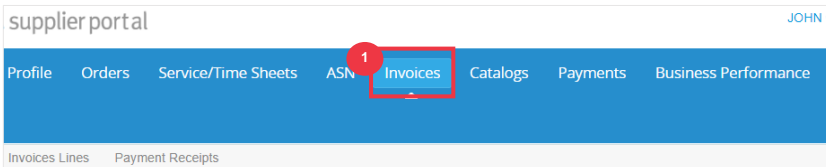
**Note:** Credit Note creation is **NOT** supported by SAN and you will need to log-in Coupa Supplier Portal ([Refer to page 50 – How to Create a Credit Note in the CSP](#))



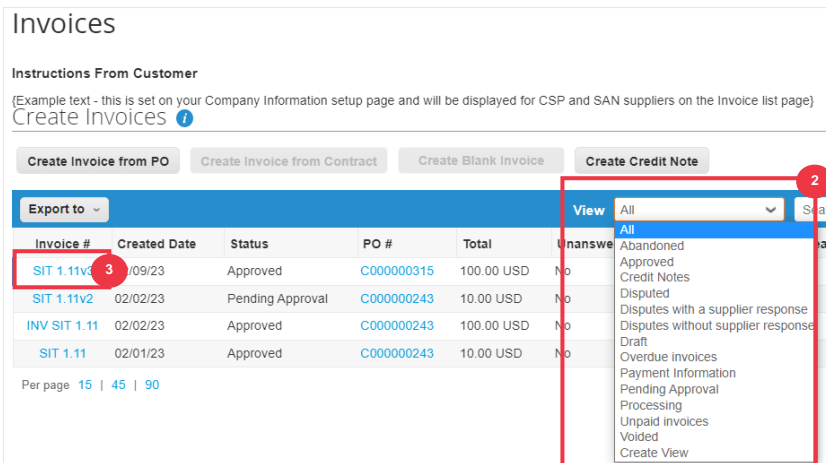
**Note:** One-time password (OTP) that you will need to provide when working with a SAN.

## How to View and Search Invoices in the CSP

- From your **CSP Home** screen, select the **Invoices** tab.

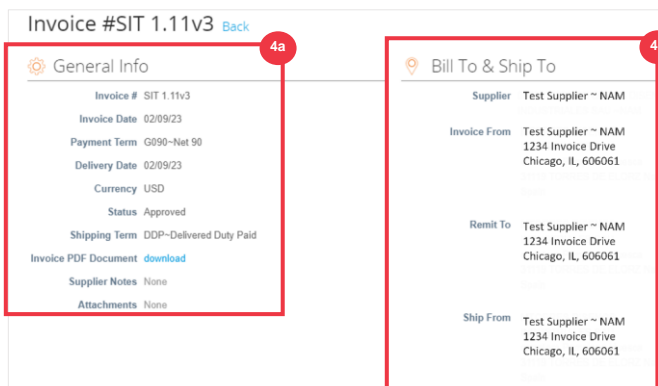


- Specify a **View** to narrow down the invoices shown in the **Invoice** table.
- Click the **Invoice Number** to view the details of the invoice.



- An **Invoice Overview** screen appears that provides you with the following:

- Invoice general information**
- Bill to & Ship To information**



- 5. Additional invoice information including the following:
  - a. **Supplier tax information**
  - b. **PO line information**

5a

Supplier Tax Number 99999999L

Customer Kimberly Clark

Bill To Address 351 Phelps Drive  
Irving, TX 75038  
United States  
VAT ID 123456789

Ship To Address W6328 Discovery Drive  
APPLETON, WI 54914-9190  
United States  
Location Code: 0004-1113-APPL

Buyer Tax ID 123456789

Exchange Rate None

Order Reference None  
Number

Transaction UUID None

Type of Receipt and Payment Method

5b

**Lines**

Line	Description	Supplier Part Number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line	Review reason	Service/Time Sheet Line
1	SIT 1.11		EA			1	10.00	10.00	C000000243-1	None	Matched

Inco Terms 2 terms

UNSPSC None

Withholding Tax None

Taxable Yes

NCM Code None

**Taxes**

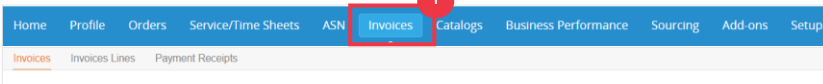
Tax Description	Tax Rate	Tax Amount	Tax Reference
U1 - US	0.0%	0.00	

[Return to Table of Contents](#)

## How to Track the Status of an Invoice in CSP

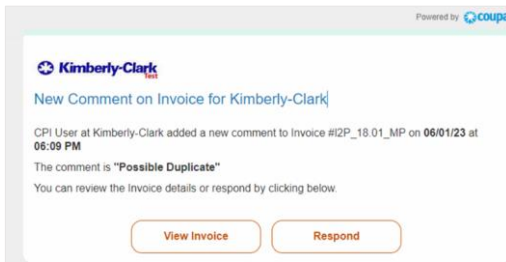
You can track the status of your invoices in the CSP once submitted.

- From the **CSP home screen**, click the **Invoices** tab.



- Verify the status of the invoice in the **Status** column. Statuses for the invoice are either:

- **Approved:** invoices that are approved
- **Disputed:** invoices that you or your customer have marked as disputed to indicate a discrepancy. If an invoice is disputed, CSP will send you an email notification (see below).



- **Draft:** invoices that have been created, but not submitted to your customer
- **Pending Approval:** invoices that have not been approved by your customer yet; contingent on validations processing within SAP. Once validated, the invoice status will change to **Approved**.
- **Voided:** invoices that rejected or reversed by your customer

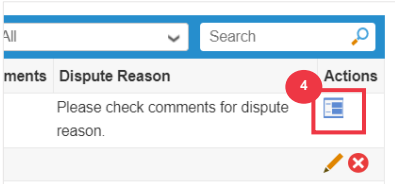
- Check the **Dispute Reason** column for comments from K-C as to the status of the invoice.

be accessed through the Procuree Chatbot  
Create Invoices

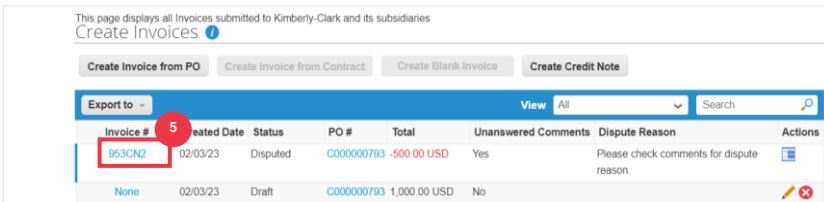
Create Invoice from PO   Create Invoice from Contract   Create Blank Invoice   Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TESTPrice8	07/22/24	Approved	E000017004	266.20 EUR	No		
TESTDAP2	07/18/24	Disputed	E000017108	12.10 USD	Yes	Disputed by K-C Accounts Payable Team	
testdisap	07/17/24	Disputed	E000017080	12.10 USD	Yes	Disputed by K-C Accounts Payable Team	
TESTdisputeAP	07/17/24	Pending Approval	E000017051	1,210.00 EUR	Yes		
TESTPrice8	07/15/24	Approved	E000017059	123.42 EUR	No		
TESTCN1	07/12/24	Disputed	E000017051	1,210.00 EUR	Yes	Tax rate missing or incorrect. Invoice payment on hold. SUPPLIER ACTION NEEDED: Credit Note to be submitted to KC.	
TESTPP2	07/11/24	Pending Approval	E000017010	580.80 EUR	No		
TESTPP1	07/11/24	Approved	E000017018	363.00 EUR	No		

4. To Resolve the invoice, click the **Resolve** icon in the **Actions** column.

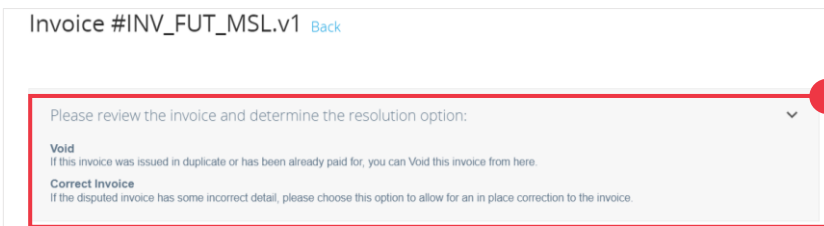


5. Click an associated **Invoice number** associated to **Disputed** status to check comments associated to a dispute reason.



6. Click the **Drop-down arrow** to view comments from K-C and determine a resolution for the noted dispute(s) and options for resolution may differ by invoicing template you're using.

- **Void:** If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.
- **Correct Invoice:** If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.
- **Cancel Invoice:** If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. Coupa will guide you through a cancelation credit note and a replacement invoice creation.
- **Adjust:** If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.







**Note:** Do NOT Correct or Cancel Invoice, if an invoice is disputed due to attachment size or multiple lines for service invoice. Please submit new invoice instead



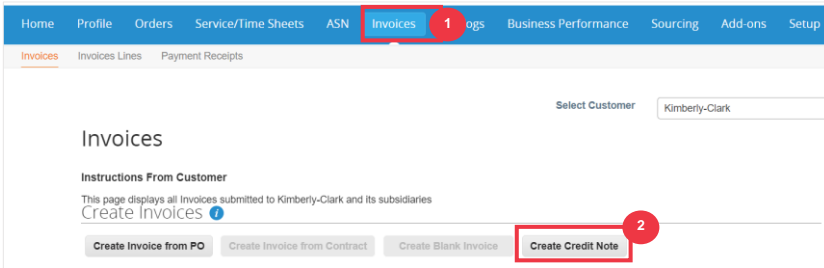
**Note:** For **Europe, Middle East and Africa** specific invoice and credit note submission requirements please visit the following link : [EMEA Invoicing Requirements](#)

**Note:** For **APAC** specific invoice and credit note submission requirements please visit the following link : [APAC Invoicing Requirements](#)


[Return to Table of Contents](#)

## How to Create a Credit Note in the CSP from Invoices

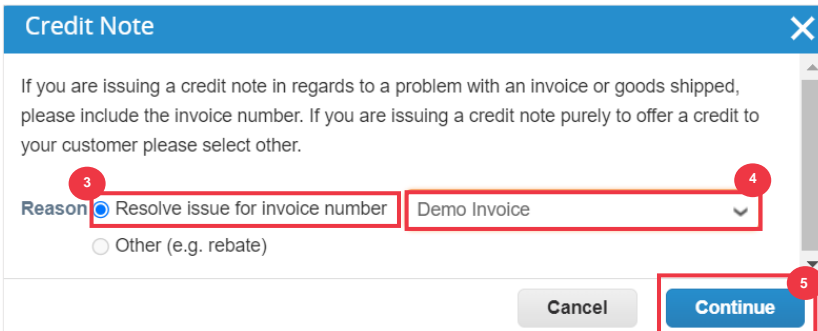
1. From the **CSP home** screen, click the **Invoices** tab.
2. Click the **Create Credit Note** button.



3. Click the **Resolve issue for invoice number** radio button.
4. Select the appropriate **invoice number** from the dropdown list. *The image below was captured with test (staged) data. Please note that while the image below does not indicate a number, a true invoice will have the invoice number listed. If appropriate invoice number is not listed from selection, refer to page 52 [How to Create Credit Note in CSP from Orders](#).*

 **Note:** As a best practice, be sure to capture the **invoice number** because it will be entered later in this process.

5. Click the **Continue** button.



6. Select the appropriate choice from the following radio button options:

- **Completely cancel the invoice with a credit note**
- **Adjust invoice with a credit note**

7. Click the **Create** button.



**Note:** Many of the credit note fields have been prepopulated with the data from the purchase order.

8. Enter the invoice number in the **Credit Note #** field.

*Please continue to next page.*

9. Click the down arrow to scroll to the **Totals & Taxes** and apply any other header level costs associated to the PO (e.g., shipping and/or handling tax or any other miscellaneous charges).
10. Click the **Calculate** button to verify the total for the credit note.
11. Click the **Submit** button to submit the credit note.

**Totals & Taxes**

Lines Net Total	-500.00
Lines Tax Totals	0.00
<hr/>	
Shipping	0.000
Tax	% 0.000
Tax Reference	Enter a tax reason description.
<hr/>	
Handling	0.000
Tax	% 0.000
Tax Reference	Enter a tax reason description.
<hr/>	
Misc	0.000
Tax	% 0.000
Tax Reference	Enter a tax reason description.
<hr/>	
Total Tax	0.00
Net Total	-500.00
<b>Total</b>	<b>-500.00</b>

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

12. Click **Send Credit Note** within the confirmation window.

**Are You Ready to Send?**

You're about to send an credit note to Kimberly-Clark for a total amount of -500.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.

Buttons: Continue Editing, Send Credit Note

13. The **Credit Note** screen appears to inform you that the credit has not been applied and will fully cancel the invoice when approved.

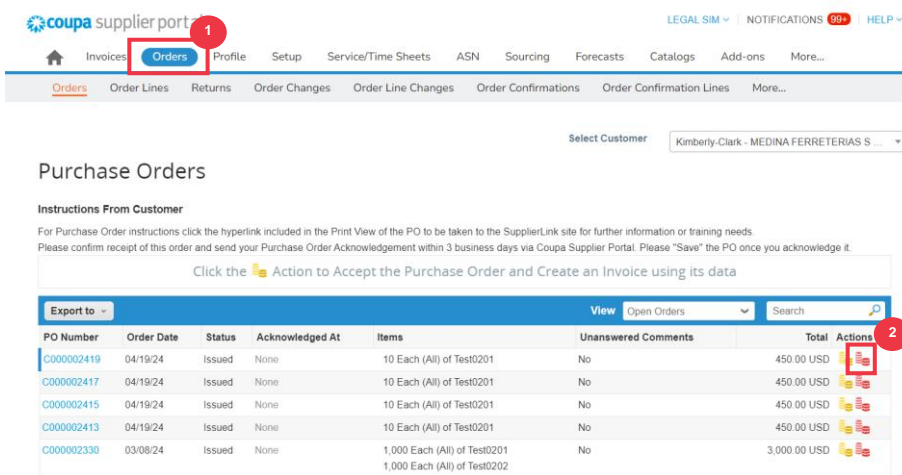
**View Credit Note #Demo credit note** [Back](#)

This credit note applies to invoice Demo Invoice. When approved, the credit will fully cancel the invoice's impact to the transaction.

Tabs: General Info, Bill To & Ship To

## How to Create a Credit Note in the CSP from Order

1. From the **CSP home screen**, click the **Orders** tab.
2. Click the **Red Coins** icon.



3. Enter the Credit Note number in the **Credit Note #** field.
4. Select a **Credit Note Date**. The **Credit Note Date** must be within 7 calendar days of the current date.
5. **Original Invoice #** and **Original Invoice Date** is mandatory information and it must be accurate.

### Create Credit Note Create

#### General Info

\* Credit Note #

\* Credit Note Date

\* Payment Term G120-Net 120

Original Date of Supply

\* Currency USD

Status Draft

Shipping Term CFR-Costs and freight

\* Original Invoice #

\* Original Invoice Date

Image Scan  No file chosen

Supplier Note

#### From

\* Supplier MEDINA FERRETERIAS S DE RL DE CV

Supplier Tax ID

\* Invoice From Address

\* Remit-To Address

Beneficiary Name: llc

SWIFT Code: \*\*\*\*EF12

\* Ship From Address

- 6. **Quantity** and **Price** fields is auto filled from the PO and you can update if it's required.

Lines  Line Level Taxation

Adjustment Type: Quantity

Type	Description	Qty	UOM	Price	
	Test0201	-10.0	Each (All)	45.00	-450.00

PO Line: C000002419-1    Service/Time Sheet Line: None    Contract: [dropdown]    Supplier Part Number: [input]

Inco Terms 2: FOB    UNSPSC: [input]    Withholding Tax: [input]    Taxable: Yes

Net/Gross Weight: [input]    Commodity/Import/HS/TARIC Code: [dropdown]    Unit of Measure: [dropdown]    PO Tax Code: [dropdown]

Billing: 2-0053010001~001--A-308069-01

Please continue to next page

- 7. Click the down arrow to scroll to the **Totals & Taxes** and apply any other header level costs associated to the PO (e.g., shipping and/or handling tax or any other miscellaneous charges).
- 8. Click the **Calculate** button to verify the total for the credit note.
- 9. Click the **Submit** button to submit the credit note.

**Totals & Taxes**

Lines Net Total	-450.00
-----------------	---------

Shipping

Tax  %

+ Tax Reference

Handling

Tax  %

+ Tax Reference

Misc

Tax  %

+ Tax Reference

Tax  %

+ Tax Reference

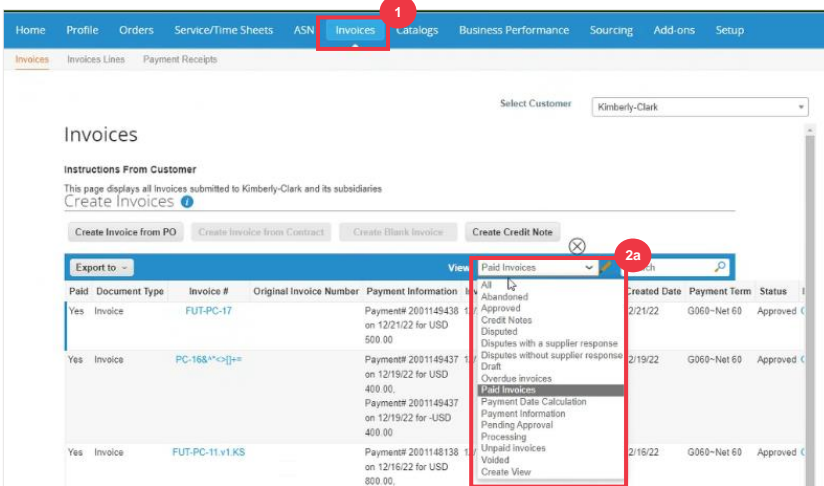
Total Tax	-22.50
Net Total	-450.00
<b>Total</b>	<b>-472.50</b>

Delete Cancel Save as Draft **Calculate** **Submit**

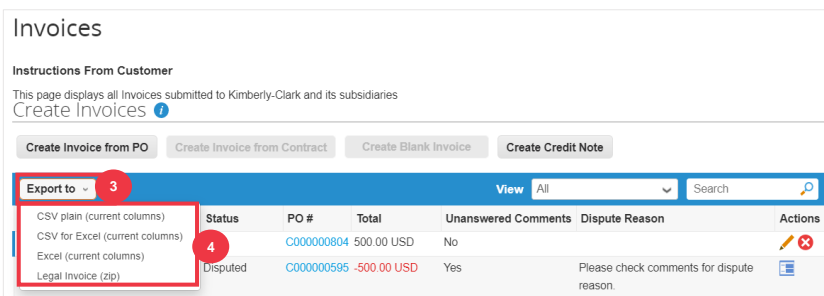
[Return to Table of Contents](#)

## How to View Payment Confirmation Details in the CSP

1. From the **CSP home** screen, click the **Invoices** tab.
2. Select a **View** from the drop-down list to filter the invoices that display in the table.
  - a. Payment confirmation views consist of the following:
    - **Overdue invoices**
    - **Paid invoices**
    - **Payment information**
    - **Unpaid invoices**

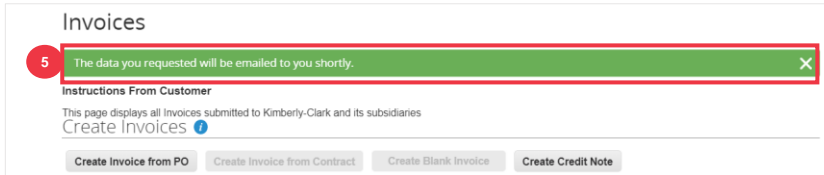


3. Click the **Export to** button if you would like to export an Excel, CSV or .ZIP file for selected view.
4. Select the file type.





5. The notification appears that the **Data you requested will be emailed to you.**



Please note the *Payment Date* shown in the CSP may be off by ~2 – 5 business days. Your payment is **not** impacted by this. If you require the *exact date*, this can be obtained through providing the invoice number to our Chatbot, [Procuree](#) (in this link you can find Procuree in the bottom right corner).

[Return to Table of Contents](#)

## Additional Resources

- [How to Onboard as a New Supplier for Suppliers – Quick Reference Card](#)
- [How to Request Change Order in the CSP – Bite Size Learning](#)
- [How to Setup a Legal Entity in the CSP – Bite Size Learning](#)
- [How to Create Invoice in CSP – Bite Size Learning](#)
- [How to Create a Credit Note in the CSP – Bite Size Learning](#)
- [How to Submit Vendor Acknowledgement in the CSP – Bite Size Learning](#)
- [How to View and Search Invoices in the CSP – Bite Size Learning](#)
- [How to View and Search Purchase Orders in the CSP – Bite Size Learning](#)
- [How to Respond to the Supplier External Form - Bite Size Learning](#)
- [How to Complete and Delegate a DDQ \(Assessment\) - Bite Size Learning](#)
- [How to Respond to Risk Actions - Bite Size Learning](#)