

COUPA SUPPLIER TRAINING





COUPA SUPPLIER PORTAL (CSP)

- Coupa is a world-class “Procure To Pay” (P2P) system that offers an e-Commerce solution for 3M to interact with its suppliers in a collaborative way. Some of the benefits of using the Coupa Supplier Portal (CSP) include:
- Receive and view 3M Purchase Orders
 - Identify Purchase Orders and easily communicate corrections and updates on prices, quantities, and delivery dates back to 3M (Purchase Order Acknowledgement)
 - Confirm shipment quantities and dates for goods receipt at 3M (Advance Ship Notices)
 - Submit Invoices electronically to 3M to enable accurate and on-time payments – no lost paper or emailed Invoices
 - Adopt a consistent business process with 3M worldwide

The document flow will be as follows:

3M sends Supplier: Purchase Orders Purchase Order Changes Invoice Status Remittance Advices	Supplier sends 3M: Purchase Order Acknowledgement (POA) Advanced Ship Notices (ASN- if applicable) Invoices
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The CSP is available at <https://supplier.coupahost.com/>. Additional training is available at https://success.coupa.com/Suppliers/For_Suppliers.

CONNECTING TO THE COUPA SUPPLIER PORTAL (CSP)

Getting started with the Coupa Supplier Portal is easy. Click on the link below to:

- Register for the CSP
- Create your Account
- Login to the CSP
- Create Custom Views
- Create/Update Your Profile
- Manage Your Profile
- View/Manage Notifications
- Get Help

[Get Started with the CSP - Coupa Success Portal](#)

**COUPA
OVERVIEW:
THE
STANDARD
END-TO-END
PROCESS**

- View PO details
- Acknowledge POs
- ASN Flip
- Invoice Flip

VIEW 3M PURCHASE ORDERS

Purchase orders will first appear in your inbox as a notification. You may view them there or open the CSP for more details.

To view a 3M Purchase Order in the CSP:

1. Click on the **Orders** tab on the CSP homepage. The Purchase Orders page appears.
2. Select 3M from the **Select Customer** drop-down list in the top right corner.
3. You can filter the table by columns, use the search bar to find a specific PO or click on the **View** drop-down list to select a filter on applicable orders.
4. For more details on a specific PO, click on the PO Number hyperlink to open the PO details.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Orders' tab is highlighted. Below the navigation bar, there's a sub-navigation bar with links for Orders, Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. On the right side, there's a 'Select Customer' dropdown menu with '3M' selected. Below this, the main heading is 'Purchase Orders'. Underneath, there's a section for 'Instructions From Customer' with a note about company information setup. A button labeled 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is present. Below this, there's a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned to, and Actions. The first row of the table shows PO Number 170, Order Date 12/22/20, Status Issued, Acknowledged At None, Items 16 each of 20651756123-Chicken Tikka Masala-P067, Unanswered Comments No, Total 1,600 JPY, and Actions. A 'View' dropdown menu is highlighted, showing 'All' as the selected filter. A search bar is also visible next to the dropdown.

PURCHASE ORDER ACKNOWLEDGEMENT

3M requires a Purchase Order Acknowledgement within 48 hours of receipt of Purchase Order.

From the Purchase Order view in the CSP, tick the **Acknowledged** checkbox which will generate a success message to confirm the acknowledgement was recorded.

Purchase Order #179

Revision

2 (Current) Dec 22
 2 (Current) Dec 22
 1 Dec 22

Status Issued - Sent Manually
 Order Date 12/22/20
 Revision Date 12/22/20
 Requester Cherry Flores
 Email cherry.mae.c.flores@accenture.com
 Payment Term None
 Header Text None
 Attachments None
 Acknowledged ☒
 Assigned to

Select

Ship-To Address
 123 Happy St
 Maplewood, MN 55144
 United States
 Location Code: 12346
 Attn: Cherry Flores
 Terms None
 Shipment Tracking

+ Add

 No shipment tracking.

Note:

If you do not agree with the details in the Purchase Order, submit a **Purchase Order Change Request** - see the next section for details.

CREATING AN ADVANCE SHIP NOTICE (ASN)

The purpose of an Advance Ship Notice (ASN) is to notify 3M of the deliveries you will be making and needs to be created 24 hours before the actual shipment. Advance Ship Notice (ASN) is mandatory for Direct Purchase Orders and Indirect Purchase orders for Foreign and SME Vendors supporting material only .

The 3M Purchase Order will determine when an ASN is required.

To create an ASN for the Purchase Order from CSP, navigate to the Orders Tab and search for the PO you want to create an ASN for.

1. Click the Flip to ASN icon
2. Populate the required fields of the ASN Header Level

Note: Disregard the Shipping Information section. Only the fields in the Create Advance Ship Notice – **General Info** section are required.

01

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Accept the Purchase Order and Create an Invoice using its data

View

All

132

Showing results for 132

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
132	12/10/20	Issued	12/10/20	16 Each of test Item line 1	No	1,424 JPY		

02

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

Select Customer 3M

Create Advance Ship Notice

General Info

ASN #

Status draft

Ship Date

Delivery Date

Bill of Lading

Trailer/Transport ID

Means of Transport

Carrier

Ship To

Address 123 Happy St
Maplewood, MN 55144
United States
Location Code: 1

Shipping Information

Tracking Number

Carrier

Shipping Method

Ship N

Batch File Attachment

Choose File

No file chosen

WHEN THE ASN DOES NOT CONTAIN BATCH MANAGED MATERIALS

If the ASN does not contain any batch managed materials:

3. Validate and change the Quantity if needed on the ASN Line Level

Note: There is no need to populate the **Vendor Batch Number**, **Manufacturer Date**, **Shelf-Life Expiration**, **3M Batch Number**, or **Serial Number**.

4. Scroll to the bottom of the ASN Page and click **Submit**.

"Advance Shipment Notice submitted successfully" message will be displayed once an ASN is successfully recorded.

Note: Suppliers with Batch Managed materials are required to include a Batch ID and other data fields on the ASN – refer to slides 16-19.

03

Lines

1	Description	Quantity	UOM	Received Quantity	Status	✕
	20651756123-Chicken Tikka Masala-P067	16	each	0	draft	
	Supplier Part Num	PO #	PO Line	Po Line Quantity		
	None	181	1	16.0		
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty		

Delivery Address

Vendor Batch Number

Manufacture Date

Shelf Life Expiration

Free Text

3M Batch Number

Serial Number

Comments

04

Cancel

Save

Submit


Advance Ship Notices

Advance Ship Notice submitted successfully

INITIATE AN INVOICE

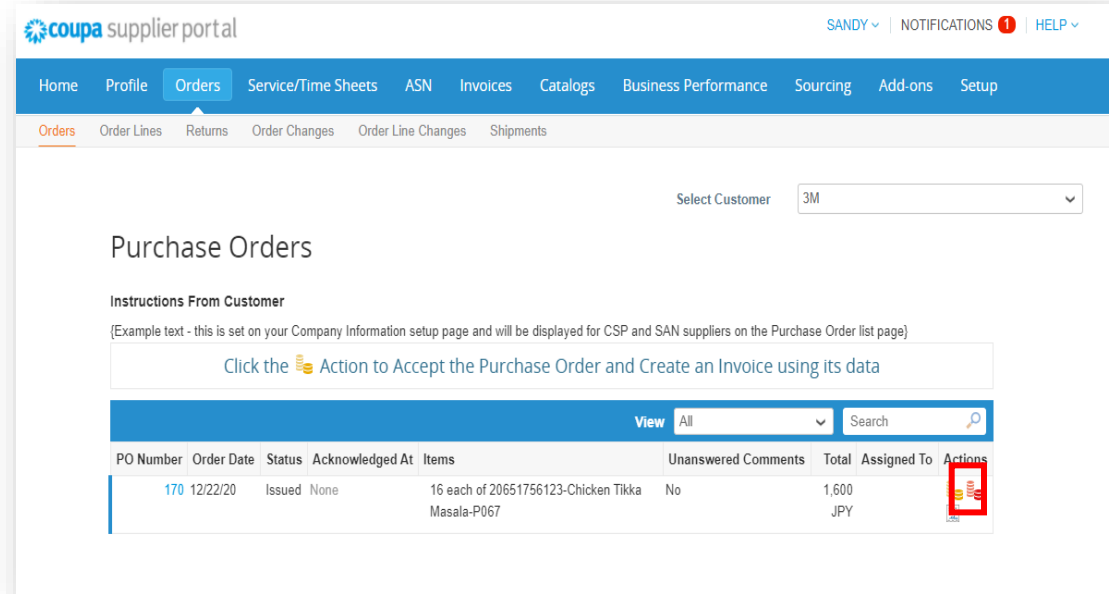
3M requires an Invoice to be electronically sent against ALL POs received via Coupa. Sending all invoices through Coupa improves accuracy, simplifies processing, and gives you more visibility to the status of invoice processing and payment.

To perform a “PO Flip” into an invoice via the CSP, there are two preferred options:

1. In the CSP, click the **Create Invoice** () icon for the PO in the Purchase Orders table.
2. When reviewing the PO, click the **Create Invoice** button at the bottom of the PO screen.

Note: Once the PO Flip is initiated, Coupa will automatically redirect to an Invoice entry screen where the PO information is automatically populated to simplify the invoice entry process.

01



coupa supplier portal

SANDY | NOTIFICATIONS 1 | HELP


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

Orders Order Lines Returns Order Changes Order Line Changes Shipments


Select Customer 3M

Purchase Orders

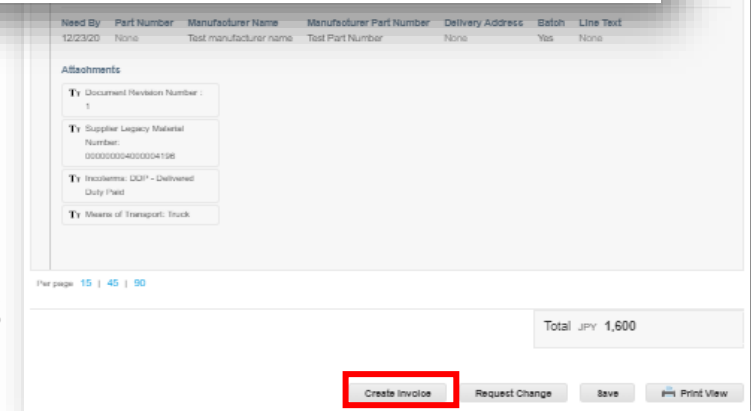
Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
170	12/22/20	Issued	None	16 each of 20651756123-Chicken Tikka Masala-PO67	No	1,600 JPY		

02



Need By: 12/23/20
Part Number: None
Manufacturer Name: Test manufacturer name
Manufacturer Part Number: Test Part Number
Delivery Address: None
Status: Yes
Line Text: None

Attachments

- Ty Document Revision Number: 1
- Ty Supplier Legacy Material Number: 000000004000004196
- Ty Incoterms: DDP - Delivered Duty Paid
- Ty Means of Transport: Truck

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Total JPY 1,600

Create Invoice Request Change Save Print View

CREATE INVOICE

Once a PO Flip has been successfully completed, the remaining key information is required to ensure the invoice can be processed:

01: Populate the necessary General Information including:

- Invoice # - enter your specific invoice number
- Invoice Date – date when the invoice was created

02: Validate the Invoice Qty at the Invoice Line level.

03: Select the CT Rate for Japan Invoices.

Once the CT Rate is selected, Coupa will automatically calculate the CT Amount for the good or service.

04: Add fees and CT for Shipping/Handling/Misc., if needed.

05: Scroll down to the bottom of the Invoice Page and click **Submit**. Follow prompts to validate that you are ready to **Send Invoice** to proceed in submitting the invoice.

01

02

**PURCHASE
ORDER
CHANGES:
COVERED
TOPICS**

- Request a PO Change
- View PO Revisions
- View PO Lines

REQUEST A PURCHASE ORDER CHANGE

You may request a change to a PO if you are unable to deliver the products requested, cannot deliver to the need by date, or the order details are incorrect.

To begin editing:

1. Click **Request Change** on the PO details page.
2. Edit the fields that 3M allows for change, such as Ship to User, Department, Estimated Arrival Date, etc.

Note: Suppliers cannot reduce the quantity/amount below the values already received or invoiced against.

3. Select a Reason for Change from the drop-down list.

Note: If selecting “Other,” you also need to provide a comment.

The PO change will go through an Approval Process which can either be Approved or Rejected by the buyer.

Note: The **Request Change** button is greyed-out for Purchase Orders with an ongoing Change Request.

When approved by the 3M Buyer, the Purchase Order and its Revision History will be updated with the changes.

The screenshot displays the 'Request Change' workflow in a PO system. At the top, a 'Total JPY 1,600' is shown. Below it, a row of buttons includes 'Create Invoice', 'Request Change' (highlighted with a red box), 'Save', and 'Print View'. The 'Lines' table below has columns for Type, Item, Qty, Unit, Price, and Total. The first line item 'Test Item' has '15' in the Qty column and '85.000000' in the Price column, both highlighted with red boxes. The 'Need By' date is '12/27/25', also highlighted. Below the table, there are fields for 'Delivery Address', 'Batch', and 'Line Text'. A 'Reason for Change' dropdown menu is open, showing options: 'Cannot fulfill order quantity/amount', 'The ordered item is no longer available', 'Cannot fulfill orders by the Need-by date', and 'Other'. At the bottom, a row of buttons includes 'Cancel', 'Request PO Cancellation', 'Save Change Request', and 'Submit Change Request' (highlighted with a red box). A green notification bar at the bottom states: 'Change request for Purchase Order #4800021770 has been submitted for approval.' Below this, there is a section for 'Instructions From Customer' with a note about company information setup.



VIEW PO REVISION DETAILS

Once a PO Revision is submitted, Revision details can be seen by reviewing the revision history on the PO header detail.

Once the change has been approved, you will receive an email notification and can open the revised PO and check on the revised details by selecting the **Supplier Print View** of the updated PO.

The “PO #” will show a drop-down list of revision numbers and a summary of the changed lines is also provided on the updated document.

Purchase Order #179

Revision

2 (Current) Dec 22

2 (Current) Dec 22

1 Dec 22

Status

Issued - Sent Manually

Order Date

12/22/20

Revision Date

12/22/20

Requester

Cherry Flores

Email

cherry.mae.c.flores@accenture.com

Payment Term

None

Header Text

None

Attachments

None

Ship-To Address

123 Happy St

Maplewood, MN 55144

United States

Location Code: 12346

Attn: Cherry Flores

Terms

None

Shipment Tracking

No shipment tracking.

+

Add

13

VIEW PURCHASE ORDER LINES

1. Click on the **Order Lines** tab to see the PO Line details.
2. Select “3M” from the **Select Customer** drop-down list.

Note: You can export the PO lines table in CSV or Excel format by clicking on **Export to**.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes tabs for Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Orders' tab is active, and the 'Order Lines' sub-tab is selected. A red circle with the number '1' highlights the 'Order Lines' sub-tab. A red box with the number '2' highlights the 'Select Customer' dropdown menu, which is set to '3M'. Below the navigation bar, the page title is 'Purchase Order Lines'. There is an 'Export to' dropdown menu and a 'View' dropdown set to 'All'. A search bar is also present. The main table displays the following data:

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
170	1	Issued	16 each of 20651756123-Chicken Tikka Masala-P067	16	1600

The screenshot shows the 'Export to' dropdown menu with the following options:

- CSV plain (current columns)
- CSV for Excel (current columns)
- Excel (current columns)

**ADVANCED
SHIPPING
NOTICES:
COVERED
TOPICS**

- **View and Manage ASNs**
- **ASN w/o Batch Managed Materials**
- **ASN w/ a Single Batch Managed Material**
- **ASN w/ Multiple Batch Managed Materials**

BATCH ID EXPLANATION

The Batch ID/Lot Number being created for a material must:

- Be no greater than 10 characters
- Not contain spaces
- Only contain alphanumeric characters
 - A through Z and 0 through 9 only
 - No special characters, i.e., -, _, /, \, \$, *, #, @, etc.
- Not start with leading zeros if entirely numeric (e.g., 09192020)
- Contain one (and only one) Date of Manufacture¹
- Contain no more than one Expiry Date²
- Have the associated Date of Manufacture and Expiry Date defined to the day³
- Be included on the labeling of the batch managed material

VIEW AND MANAGE PO ASN

1. Click on the **Inventory** tab and ASN subtab in the CSP. The **Advance Shipment Notices** page appears.
2. From the **Select Customer** drop-down list in the top right corner, select 3M.
3. You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering.

Note: When you send an ASN to a customer, the PO status changes to **Issued** even if you haven't sent them an invoice yet.

supplier portal

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

Select Customer
3M

Advance Ship Notices

Export to
View All
Search

ASN Number	Status	Delivery Date	Last Updated By	Last Updated Date	Actions
None	Draft	None	Yoshiki Tsumura	02/04/21	
None	Draft	None	Yoshiki Tsumura	02/04/21	
ASN123	Pending Receipt	12/20/20	Yoshiki Tsumura	12/17/20	
ASN1356	Pending Receipt	12/23/20	Yoshiki Tsumura	12/21/20	
TestASN	Pending Receipt	02/12/21	Yoshiki Tsumura	02/10/21	

Per page
15
45
90

WHEN THE ASN CONTAINS A SINGLE BATCH MANAGED MATERIAL (WITHOUT SPLITS)

If the ASN only contains a single batch managed material, enter the details directly into the CSP ASN line screen to capture the batch details:

1. Validate and change the Quantity, if needed, on the ASN Line Level and populate the additional fields of the ASN Line Level:
 - Vendor Batch Number
 - Manufacture Date (if shelf-life managed)
2. Scroll to the bottom of the ASN Page and click **Submit**.

“Advance Shipment Notice submitted successfully” message will be displayed once ASN is successfully recorded.

01

Lines

1	Description 20651756123-Chicken Tikka Masala-P067	Quantity 16	UOM each	Received Quantity 0	Status draft	
	Supplier Part Num None	PO # 181	PO Line 1	Po Line Quantity 16.0		
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty		
	Delivery Address	Vendor Batch Number	Manufacture Date	Shelf Life Expiration		
		Free Text	mm/dd/yy	mm/dd/yy		
			3M Batch Number			

Serial Number

Comments

02

Cancel

Save

Submit

Advance Ship Notices

Advance Ship Notice submitted successfully

WHEN THE ASN CONTAINS MULTIPLE BATCH MANAGED MATERIALS OR BATCH SPLITS

If the ASN contains more complex batch managed materials, requiring multiple batches per line with multiple splits, an upload file will be required to capture the necessary information. Use the file template provided by 3M to capture the batch details.

1. Populate the columns of the file and follow the below logic to ensure the ASN is successfully processed by 3M:
 - If a PO Line is split among multiple batches, create multiple records with the same PO Line number and unique Batch numbers with the appropriate QTY.
2. Save the template file in CSV format.
3. On the ASN Header Level, click **Choose File** and select the file.
4. Scroll to the bottom of the ASN Page and click **Submit**.

Note: "Advance Shipment Notice submitted successfully" message will be displayed once the ASN is successfully recorded.

01

Purchase (PO Line	Material	Quantity	UOM	Vendor Ba	Mfg Date	Shelf Life	3M Batch	Serial Num	HU?

02

CSV (Comma delimited) (*.csv)

Save

[More options...](#)

03

Batch File Attachment

Choose File

No file chosen

Please refer to 3M Batch File attachment

Lines

1	Description	Quantity	UOM	Received Quantity	Status
	20651756123-Chicken Tikka Masala-P067	16		0	draft

Cancel

Save

Submit

Advance Ship Notices

Advance Ship Notice submitted successfully



CRITERIA REQUIRED FOR UPLOADING BATCH FILE DURING ASN FOR DIFFERENT PO TYPES

ASN/Delivery Line Number	Vendor Material Number	Purchase Order	PO Line	Material	Quantity	UOM	Vendor Batch	Mfg Date	Expiry Date	3M Batch	Serial Number				
1		4811596688	10	3XXXXXXXXX	2000	EA	123456	20210430							

ASN/Delivery Line Number:

- Maximum 10-digit alpha numeric. No special characters.
- Same ASN# cannot be used for multiple ASNs. ASN #s should always be unique to one another.

Vendor Material Number:

- Enter if applicable.

Purchase order:

- Purchase Order # provided in the PO provided by 3M.

PO Line: PO line # available in the PO based on the PO that is sent by 3M

- For PO # starting with 48XXXXXXXX series, provide the PO line # as 10, 20, 30.....
- For PO # starting with 70XXXXXXXX series, provide the PO line # as 1, 2, 3 ,

Material:

- SKU # available in the PO provided by 3M.

Quantity:

- Actual Quantity to be shipped to 3M.



CRITERIA REQUIRED FOR UPLOADING BATCH FILE DURING ASN FOR DIFFERENT PO TYPES

ASN/Delivery Line Number	Vendor Material Number	Purchase Order	PO Line	Material	Quantity	UOM	Vendor Batch	Mfg Date	Expiry Date	3M Batch	Serial Number				
1		4811596688	10	3XXXXXXXXX	2000	EA	123456	20210430							

UOM:

- Unit of measure as mentioned in the 3M PO.

Vendor Batch:

- Vendor Batch # should be a maximum of 10-digit alpha numeric. No special characters.

Mfg Date:

- Manufacturing date of the batch # mentioned above should not be later than the date of the ASN date.

Expiry Date:

- Enter if applicable.

3M Batch:

- Enter if applicable.

Serial Number:

- Enter if applicable.

ASN BEING RAISED BY SME VENDORS

If the ASN quantity is to be split and the delivery date is not as per the PO or POA, then:

- 01. Validate and change the Quantity as needed on the ASN Line Level and split as per the planned delivery date.
- 02. Scroll to the bottom of the ASN Page and click **Submit**. The message, "**Advance Shipment Notice submitted successfully**" will be displayed once the ASN is successfully recorded.
 - The Buyer will revise the PO as per the above submitted ASN and send the revised PO with the same PO #.
 - The Vendor will receive the revised PO with the changes as per the submitted ASN in their CSP Account.
 - The Vendor will need to check the details on the revised PO and acknowledge the PO details are as per the request, or else submit a change request.
 - After the PO is acknowledged, follow the process of ASN as per the earlier slides.

01

Lines

1	Description	Quantity	UOM	Received Quantity	Status
	20651756123-Chicken Tikka Masala-P067	16	each	0	draft
	Supplier Part Num	PO #	PO Line	Po Line Quantity	
	None	181	1	16.0	
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty	

Delivery Address

Vendor Batch Number

Manufacture Date

Shelf Life Expiration

Free Text

3M Batch Number

Serial Number

Comments

Cancel

Save

Submit

02

Advance Ship Notices

Advance Ship Notice submitted successfully

**CREDIT
NOTES:
COVERED
TOPICS**

- **Create a Credit Note**
- **Resolve a Dispute with a Credit Note**
- **View Existing Credit Notes**

CREATE CREDIT NOTE

If issues are encountered with an Invoice, Coupa supports Credit Note functionality to resolve a dispute, return, and/or rebate on an invoice.

There are two ways to create a Credit Note via the CSP:

- 01. Click the **Create Credit Note** button from the Invoices page to resolve an issue for (a specific) Invoice Number.
 - 02. Click the **Create Credit Note** (📄📄) icon for the PO to:
- Completely cancel the invoice with a credit note or
 - Adjust the invoice with a credit note

Note: For more information, use the information icons or notes on the Coupa portal standard functionality.

01

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices ⓘ

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

Export to ▾

Invoice #	Created Date	Status	PO #	To
No rows.				

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Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ☒ Resolve issue for invoice number ▾

☐ Other (e.g. rebate)

Cancel Continue

02

Select Customer 3M

Purchase Orders

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the 📄📄 Action to Accept the Purchase Order and Create an Invoice using its data

View All ▾ Search 🔍

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
170	12/22/20	Issued	None	16 each of 20651756123-Chicken Tikka Masala-P067	No	1,600 JPY		Create Credit Note ⓘ

Credit Note ✕

How do you want to correct invoice "NY111" ?

☒ Completely cancel the invoice with a credit note ⓘ

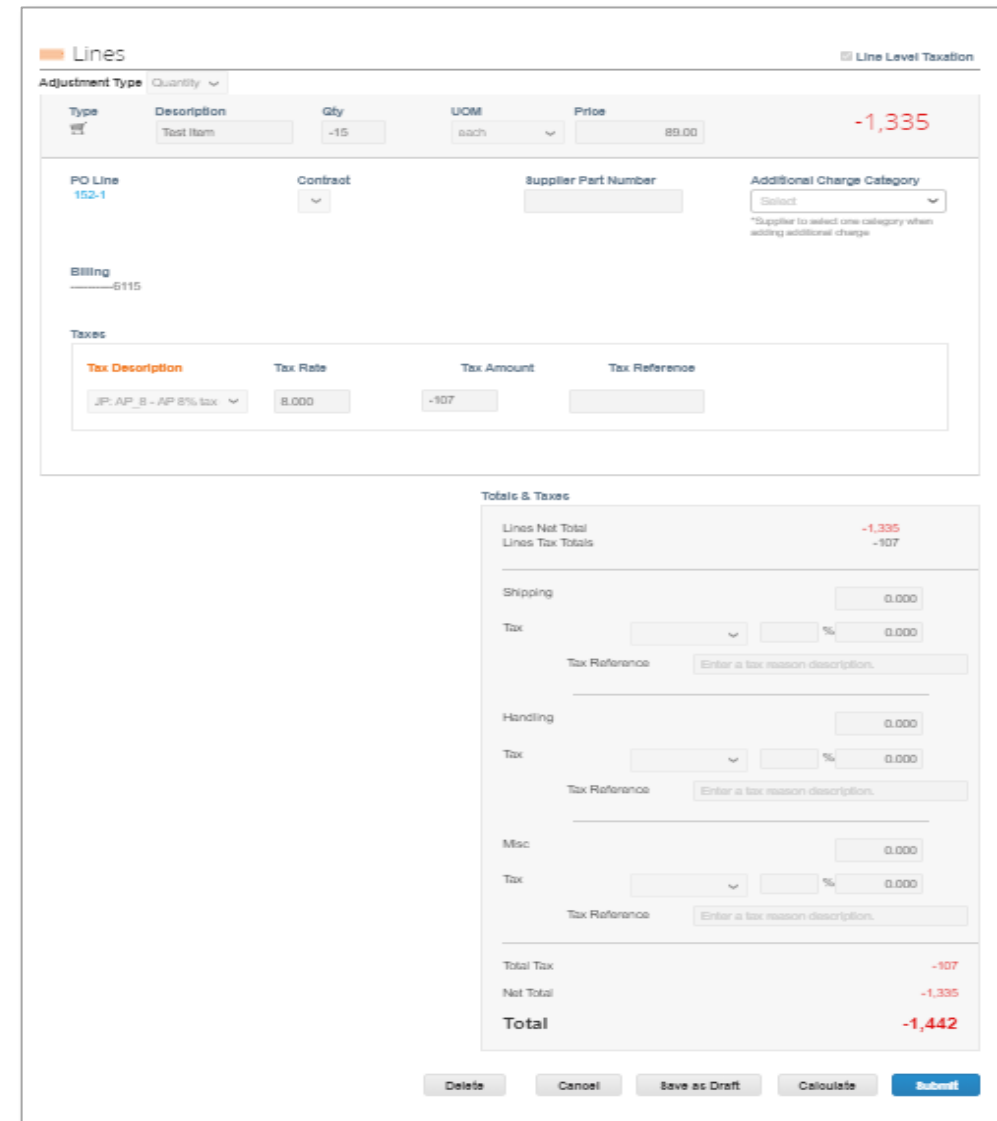
☐ Adjust invoice with a credit note ⓘ

Cancel Create

CANCEL THE INVOICE WITH A CREDIT NOTE

The Credit Note page will display.

- You can only edit the following fields: **Credit Note #**, **Credit Note Date** and **Credit Reason**. The other fields are pre-populated and cannot be edited so that all the information is carried over from the original invoice.
- When approved, the credit will fully cancel the invoice's impact to the transaction.



Lines Line Level Taxation

Adjustment Type: Quantity

Type	Description	Qty	UOM	Price	
CR	Test Item	-15	each	89.00	-1,335

PO Line: 152-1 Contract: Supplier Part Number: Additional Charge Category: Select

Billing: 6115

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
JP: AP 8 - AP 8% tax	8.000	-107	

Totals & Taxes

Lines Net Total	-1,335
Lines Tax Totals	-107
Shipping	0.000
Tax	0.000
Handling	0.000
Tax	0.000
Misc	0.000
Tax	0.000
Total Tax	-107
Net Total	-1,335
Total	-1,442

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

RESOLVE A DISPUTE WITH A CREDIT NOTE

If the credit note is related to a problem with an invoice or the goods shipped:

1. Select the **Resolve issue for invoice number** radio button and, from the drop-down list, select the invoice number.
2. Click **Continue** to select how you want to resolve the issue.

You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it. **Note:** Only quantity or price can be reduced through partial credit notes.

To record a credit:

1. Select **Other** and click **Continue**.
2. Create the credit note similarly to creating an invoice.

If you completely cancel the invoice, you can edit the following fields: **Credit Note Number**, **Credit Note Date**, **Supplier Note**, and **Discount Amount**. The other fields are pre-populated with all the information from the original invoice.

If you adjust the invoice, you can also edit the price or quantity. Line level taxes are carried over from the invoice and pro-rated based on the credit amount.

To provide a credit for header level charges, you need to submit a separate stand-alone credit note. If you selected **Other**, you are asked to create a new or choose an existing invoice-from the address before editing the invoice.

Credit Note

How do you want to correct invoice "123456789" ?

☒ Completely cancel the invoice with a credit note *i*

☐ Adjust invoice with a credit note *i*

Cancel

Create

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ☐ Resolve issue for invoice number

Select an Option

☒ Other (e.g. rebate)

Select a Contract (If applicable)

Cancel

Continue

VIEW EXISTING CREDIT NOTES

1. Select **Invoices** page
2. Find the **View** drop-down list to filter what type of columns you would like to be visible.
3. In the pop-up that displays, choose **Credit notes**.

coupa supplier portal

YOSHIKI | NOTIFICATIONS 14 | HELP

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

Invoices
Invoices Lines
Payment Receipts

Select Customer
3M

Invoices

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices

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

Export to
View
All
Search

Invoice #	Created Date	Status	PO #	Total	Unanswered	Actions
3M-Invoice	02/16/21	Pending Approval	163	1,836 JPY	No	
InvoiceTesting	02/16/21	Pending Approval	180	1,728 JPY	No	
TestInv3	02/15/21	Pending Approval	179	1,728 JPY	No	
TestINV2	02/15/21	Voided	179	1,728 JPY	No	
TestCreditNote	02/15/21	Approved	152	-1,442 JPY	No	
InvoiceTest	02/15/21	Approved	152	1,442 JPY	No	
None	02/15/21	Draft	152	1,335 JPY	No	
None	12/22/20	Draft	181	1,600 JPY	No	
CN163	12/22/20	Approved	163	-1,650 JPY	No	
None	12/22/20	Draft	163	0 JPY	No	
None	12/22/20	Draft	163	0 JPY	No	
None	12/22/20	Draft	163	0 JPY	No	
None	12/22/20	Draft	163	0 JPY	No	
CN152	12/22/20	Approved	132	-1,566 JPY	No	

FREQUENTLY ASKED QUESTIONS



FREQUENTLY ASKED QUESTIONS

HOW DO I SEE MY 3M'S PURCHASE ORDERS?

On the main menu, click the **Orders** tab. If you are connected to more than one Coupa customer, select 3M from the **Select Customer** drop-down menu.

HOW DO I ADD A CARRIAGE TO A PURCHASE ORDER?

You need to directly contact your 3M requester for information about adding a carriage line.

HOW DO I CHANGE A PRICE ON A PURCHASE ORDER?

You cannot directly change the price on a PO through the CSP. If you need the Price, QTY, or estimated delivery date on a PO, you can request a change to the PO for 3M to review and approve. Once approved, this action will trigger a revision on the PO.

HOW DO I INVOICE A LIMIT PURCHASE ORDER?

You can invoice multiple times against a single PO. Click the gold coin icon for the PO as you normally would and enter the amount you would like to appear on the invoice. The next time you want to invoice against the PO, do the same thing.

FREQUENTLY ASKED QUESTIONS

ONCE AN INVOICE HAS BEEN APPROVED, WHAT DO I NEED TO DO NEXT?

Nothing. The invoice is in 3M's queue and you will be paid based on the payment terms set on the PO.

HOW DO I KNOW IF AN INVOICE HAS BEEN REGISTERED?

On the main menu, click the **Invoices** tab. Look for invoices that are still listed as drafts. They need to be edited and then submitted. If the invoice is not there, it is not in the system.

DO I NEED TO SEE A PURCHASE ORDER ON THE CSP BEFORE I CAN INVOICE 3M?

Yes.

WHAT DOES THE EXPORT TO BUTTON DO?

You can export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (.zip) file. By default, the maximum number of rows that you can export is 200,000. If you try to export a larger table, you receive an error message stating that only 200,000 rows are exported.

Note: There is no limitation on the number of invoices or file size when exporting legal invoices.

Tip: For the best performance, it is recommended not to export more than 1,000 invoices at a time.

When you export a table with less than 500 rows, the file immediately downloads to your computer. When a table has more than 500 rows, you receive the exported file zipped in an e-mail.



FREQUENTLY ASKED QUESTIONS

HOW DO I CREDIT OR CANCEL AN INVOICE THAT HAS ALREADY BEEN BILLED?

To create a credit, enter a negative quantity or an amount to reverse the original invoiced details. For more information, see [Creating a Credit Note](#). Once an invoice is submitted, it cannot be changed in any way.

HOW DO I PARTIALLY INVOICE A PO LINE?

You can invoice multiple times against a single PO. Click the gold coin icon and enter the amount/quantity you would like to appear on the invoice.

WHY CAN I NOT EDIT, VOID, OR DELETE AN INVOICE?

Once an invoice has been submitted, it cannot be changed in any way. This ensures invoice processing integrity. However, you still have options:

1. Ask 3M to reject or void the existing invoice before paying. You can then create a new one.
2. Create a new credit memo that credits 3M for the original value and then create a new invoice.

WHAT DO I DO IF AN INVOICE WAS REJECTED?

Create a corrected invoice to replace the one that was rejected, making sure to address the comments stating why it was rejected.

WHAT TYPES OF FILES CAN I ATTACH TO AN INVOICE?

For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or less.

WHAT IF I HAVE AN INVOICE THAT HAS NOT BEEN PAID?

For questions regarding payment information, contact 3M directly. Some payment details might be on the invoice document in Coupa. Also, in your notification settings you can choose to receive payment notifications via e-mail.

FREQUENTLY ASKED QUESTIONS

HOW DO I SUBMIT AN INVOICE?

Your account needs to be configured to handle invoices through 3M's Coupa instance.

WHY CAN I NOT SEND CXML INVOICES?


Check to see if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

DO I NEED TO INCLUDE ACCOUNTING INFORMATION ON CXML INVOICES?

Invoices against a PO do not need accounting information because that information is part of the requisition and is carried over to the PO. When an invoice references a PO line number, Coupa takes the accounting information associated with the line and adds it to the invoice

HOW DO I ADD SHIPPING CHARGES TO AN INVOICE?

You can add shipping charges at the bottom of the invoice.

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