

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

Coupa



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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

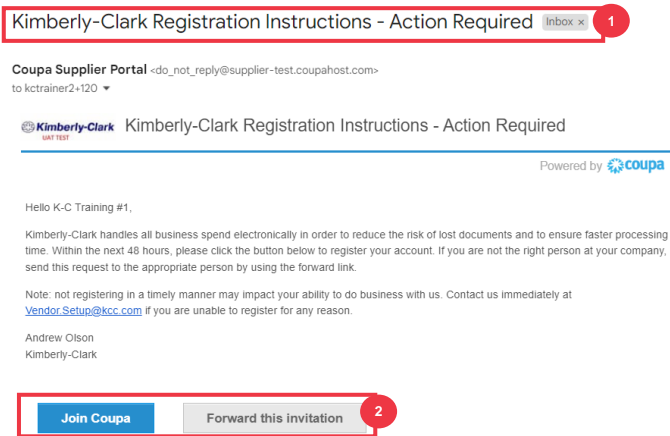
- The **Coupa Supplier Portal** is a web portal designed to assist suppliers in managing their business transactions with Kimberly-Clark (K-C).
- The **Advance Shipping Notice** is an electronically communicated notification of shipment of goods from suppliers to their customers.
- An **Invoice** is 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.

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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. 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)
4. 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.

5. 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 fields: Business Name (Test supplier), Email (kcsupplierstest+1051@gmail.com), First Name (John), Last Name (Doe), Password, and Confirm Password.
- 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 "Already have an account? LOG IN" link.



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

6. 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.**
7. 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 several input fields, each with a red asterisk indicating it is required. A red box highlights the entire form area, with a red circle containing the number "6" next to it. Below the form, a blue "Next" button is highlighted with a red box and a red circle containing the number "7". Below the "Next" button is a link that says "Skip for Now".

* First Name SupplierName	* Last Name Trainer	
* Phone Number		
* Country/Region United States		
* Address 123 Main Street		
* City Houston	* State Texas	* Postcode 77092

Next

[Skip for Now](#)

Please continue to the next page.

- 8. 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.
- 9. 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.
- 10. 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

- 11. 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**.
- 12. 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

- 13. Choose your country.
- 14. Choose Diversity Categories applicable for your company.
- 15. 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](#)

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

- 19. Choose industry applicable for your company.
- 20. Choose categories of service that your company provides.
- 21. 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](#)

- 22. 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**.

The screenshot shows the Coupa Supplier Portal homepage. At the top, there is a navigation bar with tabs for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below the navigation bar, there is a section for "Action needed: Complete your profile to get paid faster and get discovered" with a "Learn More" link. The "Profile Progress" section shows a progress bar at 12% Complete and a "Last Updated" timestamp of "about 4 hours ago" with an "Improve Your Profile" button. The "Profile Summary" section features three cards: "3 Legal Entities" (with a "View" link), "1 Registered User" (with a "View" link), and "1 Connected Customer". On the right side, there are sections for "Announcements" (with a "View All (0)" link), "One-Click Savings" (with a "View All" link), and "Merge Accounts" (with a "Request Merge" button and a "Learn more" link).

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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**.

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The navigation path is: Home > Profile > Setup > Admin > Legal Entity Setup. A table lists users with columns for Users, Permissions, and Customer Access.

Users	Users	Permissions	Customer Access
<ul style="list-style-type: none"> Merge Requests Legal Entity Setup Fiscal Representatives 	<ul style="list-style-type: none"> John Doe xcsupplierstest+11@gmail.com Status: Active Edit 	<ul style="list-style-type: none"> ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation 	<ul style="list-style-type: none"> Kimberly-Clark

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

The screenshot shows the 'Admin Legal Entity Setup' page. The 'Add Legal Entity' button is highlighted with a red box and the number 4. Below the button is a table with columns for Invoice From, Remit-To Accounts, Locations, TAX IDs, and Customers.

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.

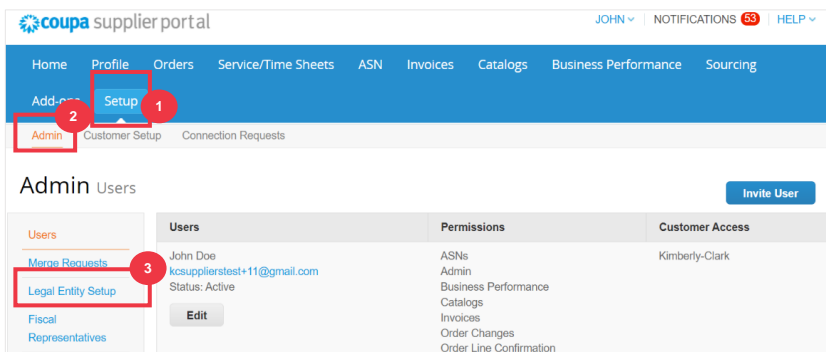
24. Click the **Done** button.

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How to Manage Legal Entity in the CSP

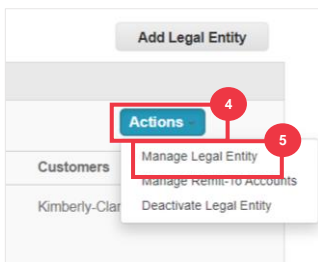
In order to electronically invoice (either through CSP or via your actionable e-mail address provided during registration), your entity must be set-up as an established legal entity within CSP.

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.

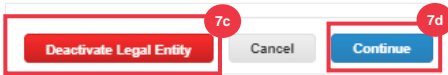


From here, you can edit the details that you originally entered. For details per each field, please see the [How to Setup Your Company as a Legal Entity](#) section in this document. Additionally, please see considerations below:

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**.

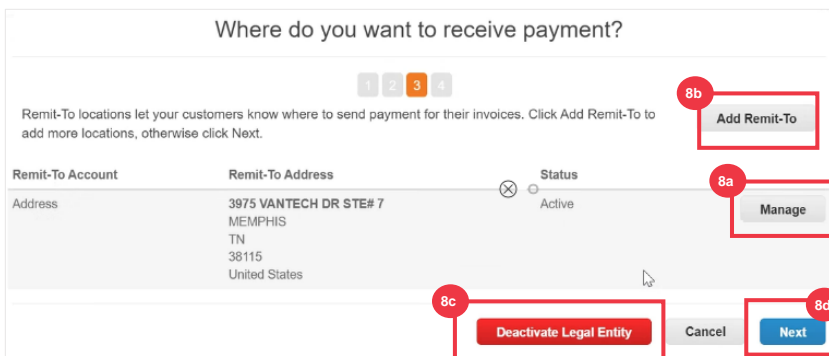
7. Edit your **customer** information.
 - a. If applicable, edit your selection in the **Which Customers do you want to see this** checkbox.
 - b. You cannot change the **Address** or **Tax ID information** associated to your legal entity in this process. If you need to amend these fields, you will need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

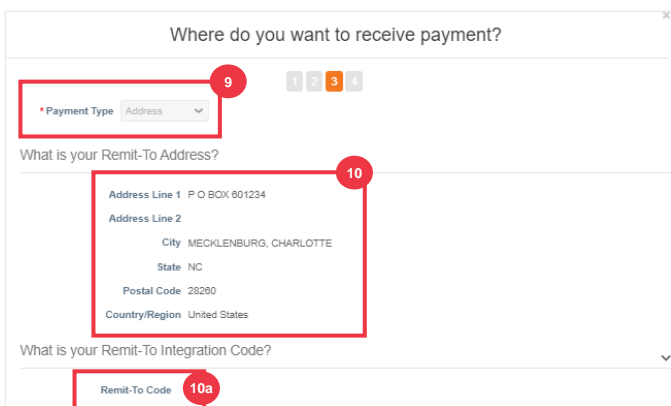


8. You can edit **Where you want to receive payment.**

- 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.

The screenshot shows a 'Contact Information' form with the following fields: First Name, Last Name, Phone Type, Country, Code, Phone Number, Contact Number (dropdown), Email, and Web Site. A red box labeled '11' encompasses these fields. Below the form is a section titled 'Which customers can use this account?' with two checkboxes: 'All' and 'Kimberly-Clark', both checked. A red box labeled '12' encompasses this section. At the bottom of the form are three buttons: 'Cancel', 'Deactivate Remit-To' (labeled '13'), and 'Continue' (labeled '14').

- 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.

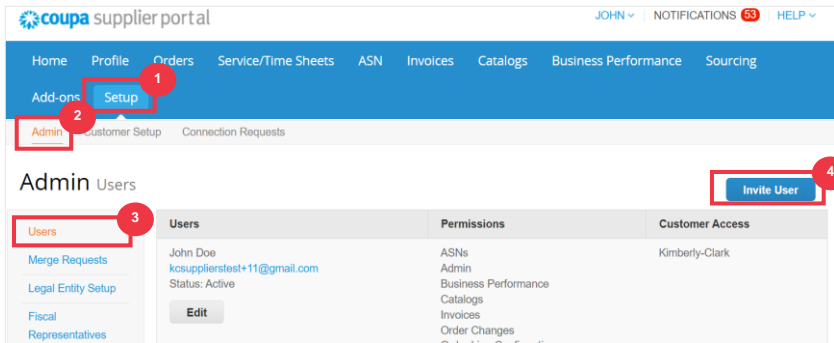
The screenshot shows a 'Where do you ship goods from?' form. At the top, there are four numbered tabs (1, 2, 3, 4) with tab 4 selected. Below the tabs is a text box: 'For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.' To the right of this text is a button labeled 'Add Ship From' (callout 15a). Below the text box is a table with columns 'Title' and 'Status'. The table contains one row: '3975 VANTECH DR STE# 7 MEMPHIS TN 38115 United States' with 'Active' status. To the right of this row is a button labeled 'Manage' (callout 15b). At the bottom of the form are two buttons: 'Deactivate Legal Entity' (callout 15c) and 'Done' (callout 15d).

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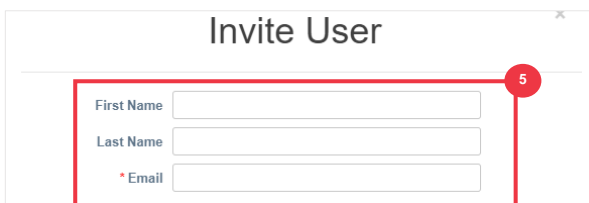
How to Invite Users to the CSP

- 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 web interface with two main sections: 'Permissions' and 'Customers'. The 'Permissions' section (6) contains a list of permissions with checkboxes: All, Admin, Orders, Restricted Access to Orders (with sub-options All and Restricted Access to Orders), Invoices, Catalogs, Profiles, ASNs, Service/Time Sheets (with sub-options Restricted Access to Service/Time Sheets and All), Payments, Order Changes, Pay Me Now, Business Performance, Sourcing, and Order Line Confirmation. The 'Customers' section (7) contains a list of customer groups with checkboxes: All and Kimberly-Clark. At the bottom right, there are two buttons: 'Cancel' and 'Send Invitation' (8), with the latter highlighted by a red box and a red circle containing the number 8.

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)**.

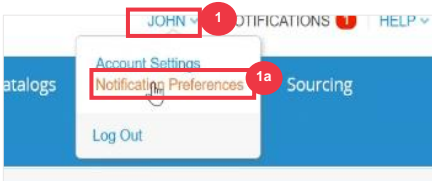
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How to Manage Notification Preferences in the CSP

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).

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email: kcsupplierstest+1051@gmail.com Mobile(SMS): +1 201-555-5555 **Verify**

Category	Notification Type	Online	Email	SMS
Announcements	New Customer Announcement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Business Performance Role Granted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service/Time Sheets	A Service/Time Sheet is rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	A Service/Time Sheet is approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

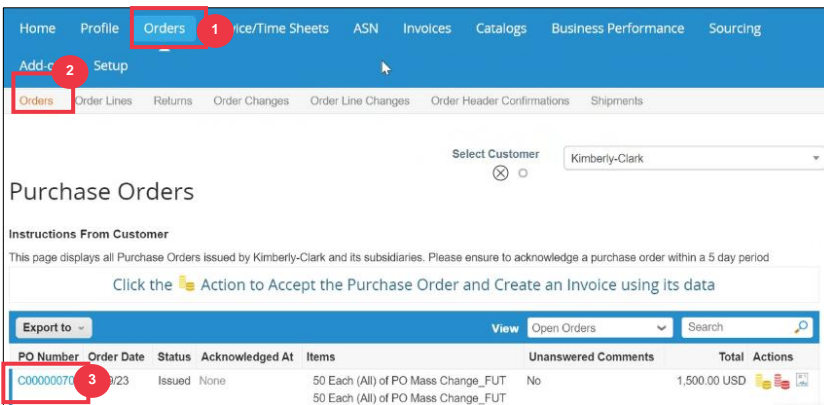
Cancel **Save**

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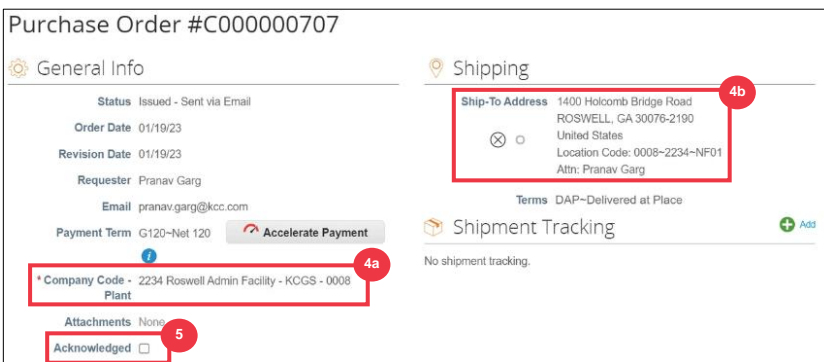
How to Submit Vendor Acknowledgment of Purchase Orders in the CSP

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.

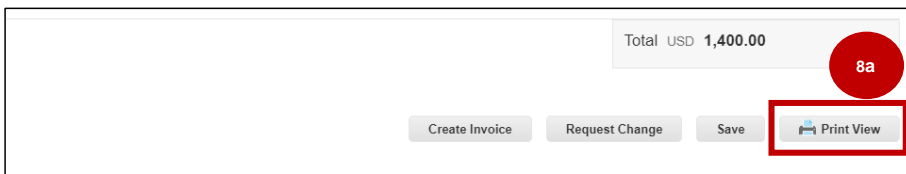
7. You will receive an **Order acknowledged** notification.

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.couphost.com/order_headers/print_view?id=1973&version=1 - Work - Micr...
8b

https://kimberlyclark-test.couphost.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
 Dormagen, 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
											5,000.00 EUR	

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 \(kimberly-clark.com\)](#)

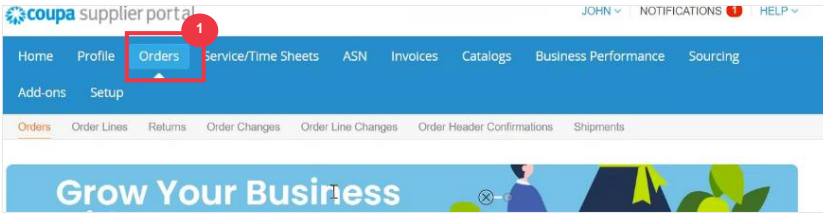
Purchase Order, Delivery and Invoicing instructions requirements can be found under Supplier Link ([Source-to-Pay Process \(kimberly-clark.com\)](#))

8d

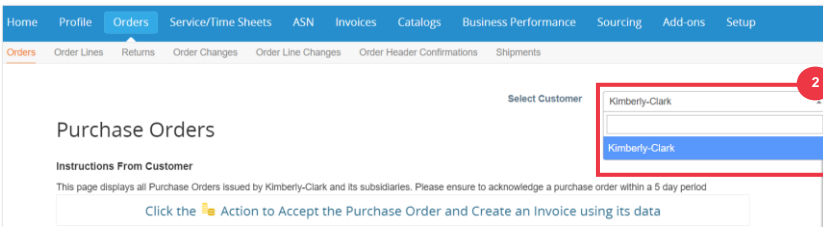
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How to View and Search Purchase Orders in the CSP

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.

The screenshot shows the 'Purchase Orders' table. The first row is highlighted with a red box and a red circle containing the number 3. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row contains the following data: PO Number: C000000745, Order Date: 01/25/23, Status: Issued, Acknowledged At: None, Items: 1 Each (All) of Monitor, Unanswered Comments: No, Total: 500.00 USD, Assigned To: [empty], Actions: [empty].

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C000000745	01/25/23	Issued	None	1 Each (All) of Monitor	No	500.00 USD		
C000000744	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	Yes	450.00 USD		
C000000743	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	No	500.00 USD		
C000000739	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	No	500.00 USD		
C000000738	01/25/23	Issued	None	50 Each (All) of PO Mass Change_FUT 50 Each (All) of PO Mass Change_FUT	No	1,000.00 USD		

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.

PO Number	Order Date	Status	Acknowledged At	Items	Unans	Assigned To	Actions
C000000745	01/25/23	Issued	None	1 Each (All) of Monitor	No		
C000000744	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	Yes		
C000000743	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	No	500.00 USD	
C000000739	01/25/23	Soft Closed	None	50 Each (All) of PO Mass Change_FUT	No	500.00 USD	
C000000738	01/25/23	Issued	None	50 Each (All) of PO Mass Change_FUT 50 Each (All) of PO Mass Change_FUT	No	1,000.00 USD	

5. Enter a **Name** for your view.
6. 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)
7. 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).
 - a. 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.**
8. Click the **Match Conditions** drop-down list to apply conditions to your view based on data available in the CSP.

Create New data table view

General

Name

Visibility Only Me Everyone

Start with view

Conditions

Match Conditions Add group of conditions

Filter By Filter Clause Filter Text

9. Click-and-drag the data points from (9a) **Available Columns** field for to (9b) **Selected Columns** to display.
10. Define the **Default Sort Order** (use this option to sort the result sets from your view in ascending or descending order).
11. 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.

9a Available Columns

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

9b Selected Columns

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

10 Default Sort Order

Sort by in ascending order.

11

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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

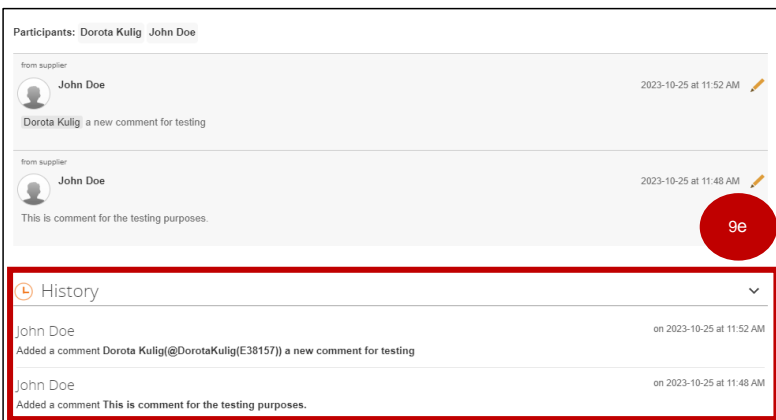
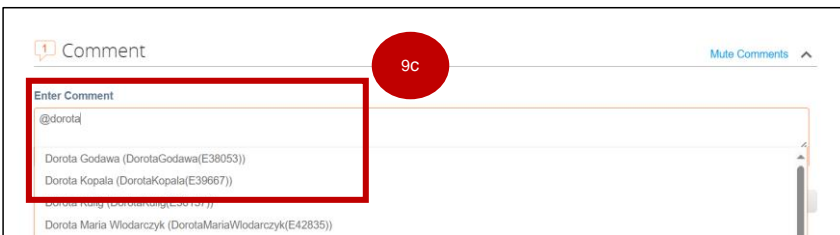
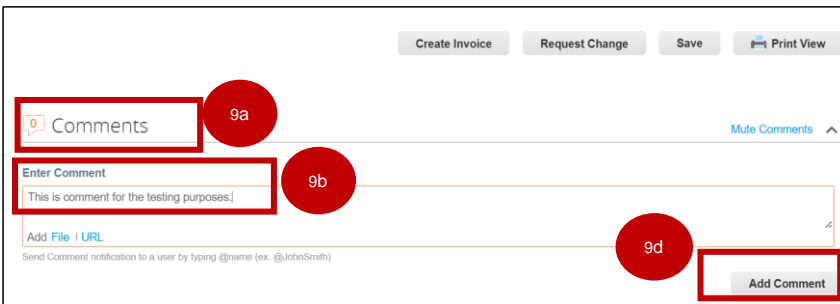
- Cannot fulfill order quantity/amount
- Cannot fulfill orders by the Need-by date
- Other

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.

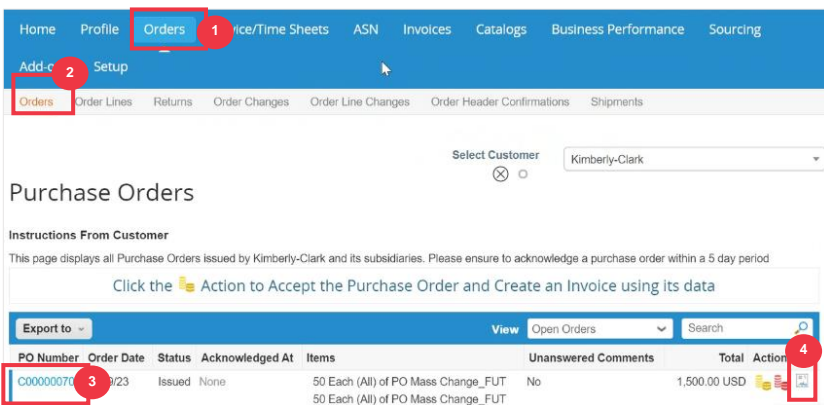
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How to Create an Advance Shipping Notice (ASN) in the CSP

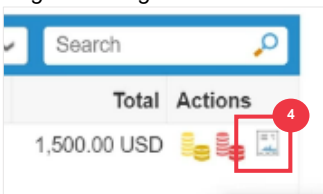
Commented [KD2]: Not relevant for EMEA

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.

The screenshot shows the 'Create Advance Ship Notice' form. It is divided into three main sections: 'General Info', 'Ship To', and 'Shipping Info'.
- **General Info:** Includes fields for '* ASN #' (callout 5a), Status (Draft), UOM, Gross Weight, Ship Date, and Expected Delivery Date.
- **Ship To:** Includes 'Ship To Warehouse', 'Ship to Address' (1400 Holcomb Bridge Road, ROSWELL, GA 30076-2190, United States, Location Code: 0008-2234-NF01), and 'Ship to Attention' (Pranav Garg) (callout 5b).
- **Shipping Info:** Includes fields for Tracking Number, Carrier, Shipping Method, Standard Carrier Alpha Code, Container, and Trailer (callout 5c).

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

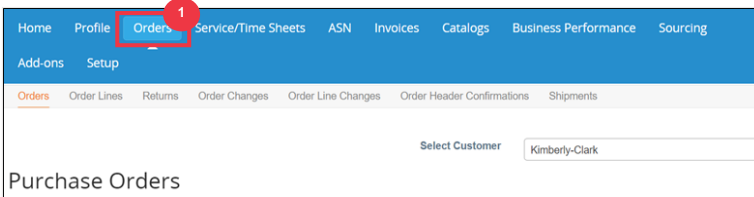
This screenshot shows the bottom portion of the form. At the top, there is a table with columns: 'Invoice Num Reference', 'Invoice', 'Invoice Line', 'Invoice Line Qty', and 'Supplier AUX Part Number'. Below the table, there is a 'Match Reference' section with a 'None' value. A large text area labeled 'Comments' is highlighted with a red box and callout 6. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Submit' (highlighted with a red box and callout 7).

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

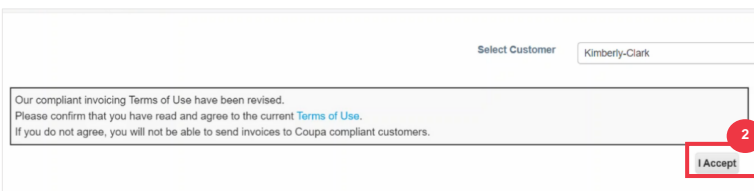
The CSP allows you to quickly transfer a PO into an invoice (i.e., flip a PO) and send to your customers.

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

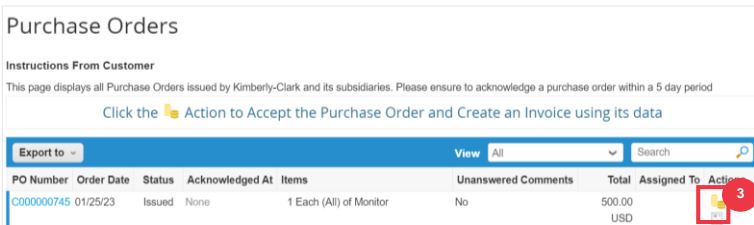


Note: If this is your **first-time** invoicing **Kimberly-Clark**, you will need to accept the Coupa Supplier Portal's updated Invoicing Terms of Use before continuing.

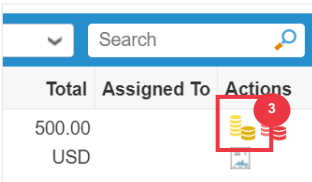
2. Click the **I Accept** button (if applicable).



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.

Choose Invoicing Details

* Legal Entity: Select (dropdown menu open showing Action Legal Entity, TEST SUPPLIER)

Invoice From: 28260, United States, United States

* Remit-To: P O BOX 601234, MECKLENB

* Ship From Address: P O BOX 601234, MECKLENB

Buttons: Cancel, Save

- 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**.

Create Invoice Create

General Info

* Invoice #: [Field] (6)

* Invoice Date: 02/17/23 (7)

* Payment Term: G120-Net 120 (Accelerate Payment)

Date of Supply: 02/17/23

* Currency: USD

Delivery Number: [Field]

Status: Draft

Supplier Note: [Field]

From

* Supplier: Test Supplier Inc

Supplier Tax ID: [Dropdown]

* Invoice From Address: Test Supplier Inc, 123 Invoice Drive, Chicago, IL 60601, United States

* Remit-To Address: Test Supplier Inc, 123 Invoice Drive, Chicago, IL 60601, United States

* Ship From Address: Test Supplier Inc, 123 Invoice Drive

9. Click **Add File**.

10. Click the **Browse** button to attach an original copy of the invoice.



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**
- e. **NCM Code** (8-digit code that defines any goods that circulate in Mercosur countries)

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: [Dropdown]

Supplier Part Number: [Text Field]

Self Billed by KC?: No

Inco Terms 2: Shipping Point

UNSPC: [Text Field]

Withholding Tax: [Text Field]

Taxable: Yes

NCM Code: [Dropdown]

Billing: 1-0071710000-0008-0000084752-0008



Note: **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)

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

Lines Net Total	500.00
Lines Tax Totals	0.00

Shipping:

Tax: % 0.000

+ Tax Reference: Enter a tax reason description.

Handling:

Tax: % 0.000

+ Tax Reference: Enter a tax reason description.

Misc:

Tax: % 0.000

+ Tax Reference: Enter a tax reason description.

Total Tax	0.00
Net Total	500.00
Total	500.00

Buttons: Delete, Cancel, Save as Draft, **Calculate** (13), **Submit** (14)

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

Are You Ready to Send?

You're about to send an invoice 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 invoice.

Buttons: Continue Editing, **Send Invoice** (15)

Per K-C 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:

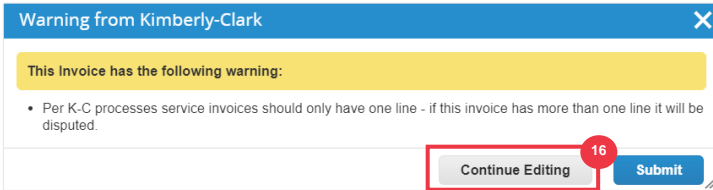
Warning from Kimberly-Clark

This invoice has the following warning:

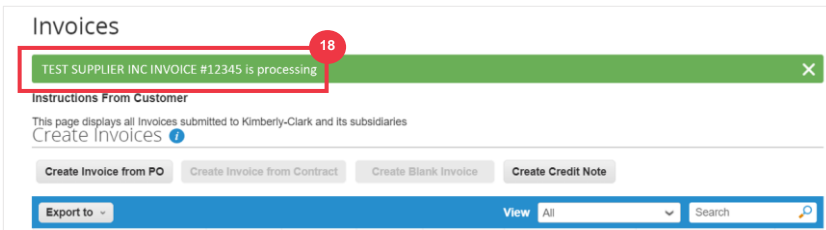
- Per K-C processes service invoices should only have one line - if this invoice has more than one line it will be disputed.


Buttons: Continue Editing, **Submit**


- 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.



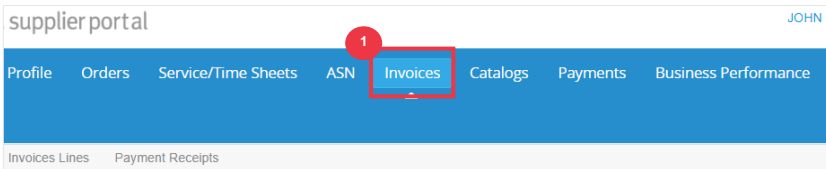
 **Note:** For low volume invoice suppliers, Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications. You receive a SAN notification with action buttons and can create an invoice immediately without needing to log into Coupa portal ("Create Invoice"). Please ensure that the PO transmission method is 'E-mail' and that the email address of the person/finance team responsible for submitting the invoices is in supplier contacts to allow receipt of a SAN notification with action buttons and invoice status notification.

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

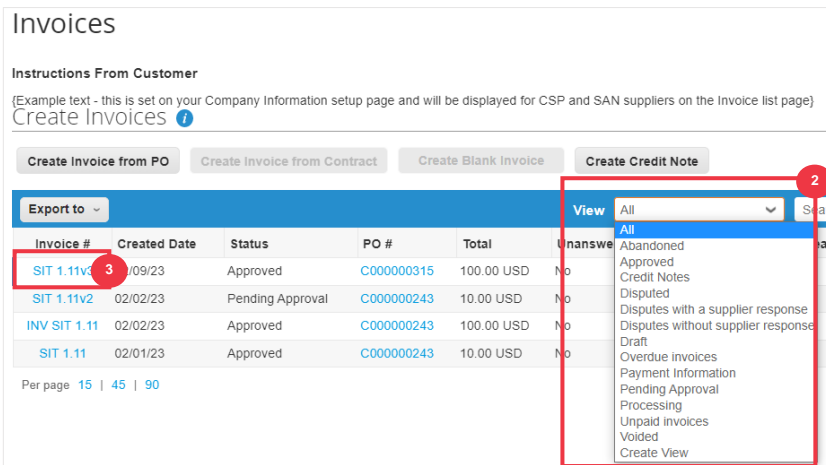
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How to View and Search Invoices in the CSP

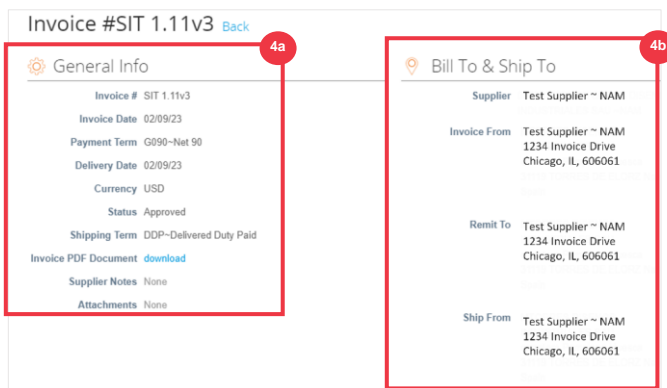
1. From your **CSP Home** screen, select the **Invoices** tab.



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



4. An **Invoice Overview** screen appears that provides you with the following:
 - a. **Invoice general information**
 - b. **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

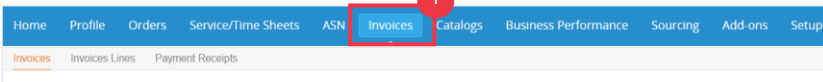
Tax Description	Tax Rate	Tax Amount	Tax Reference
U1 - US	0.0%	0.00	

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How to Track the Status of an Invoice in CSP

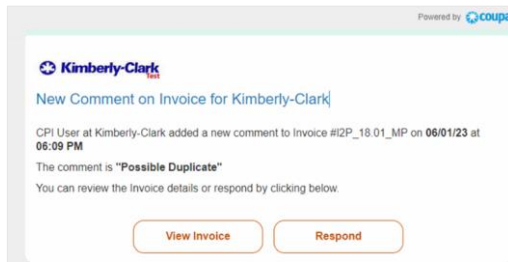
You can track the status of your invoices in the CSP once submitted.

- 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

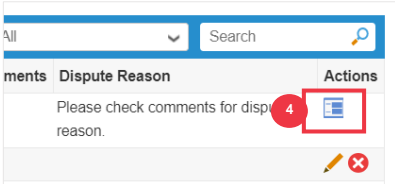
- Check the **Dispute Reason** column for comments from K-C as to the status of the invoice.

Create Invoices ⓘ

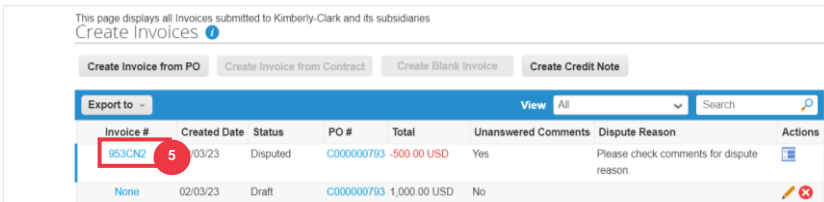
Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
953CN2	02/03/23	Disputed	C000000793	-500.00 USD	Yes	Please check comments for dispute reason.	📄
None	02/03/23	Draft	C000000793	1,000.00 USD	No		✏️ ❌
954CN1	02/03/23	Disputed	C000000595	-500.00 USD	Yes	Please check comments for dispute reason.	📄
None	02/03/23	Draft	C000000778	500.00 USD	No		✏️ ❌
953CN1	02/03/23	Disputed	C000000793	-100.00 USD	Yes	Please check comments for dispute reason.	📄

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

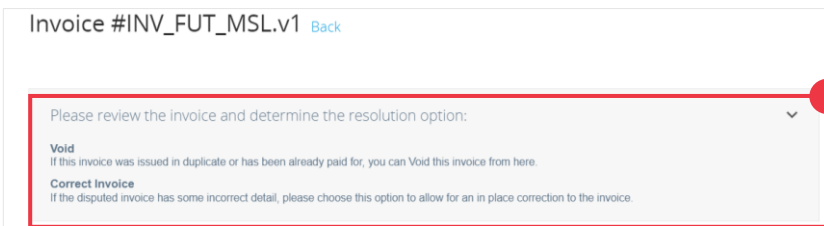


5. Click an associated **Invoice number** associated to **Disputed** status to check comments associated to a dispute reason.



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

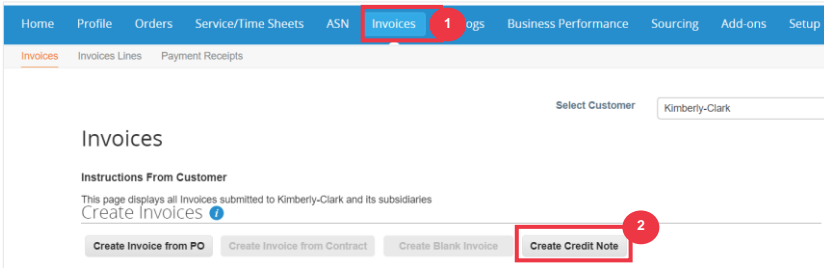


Note: For Europe, Middle East and Africa specific invoice and credit note submission requirements please visit the following link : [EMEA Invoicing Requirements](#)

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How to Create a Credit Note in the CSP

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

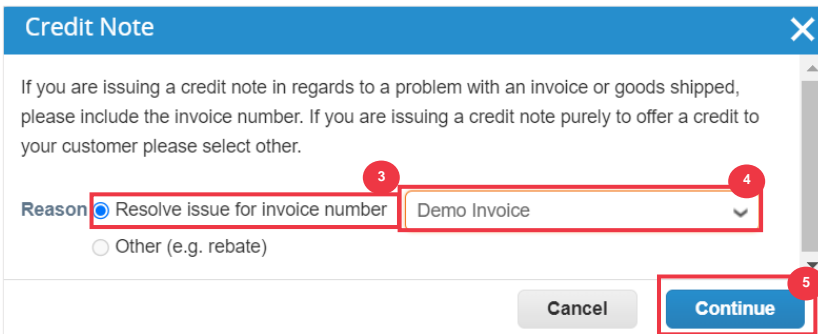


3. Click the **Resolve issue for invoice number** radio button.
4. Select the appropriate **invoice number** from the dropdown list. *The image below was captured with test (staged) data. Please note that while the image below does not indicate a number, a true invoice will have the invoice number listed.*

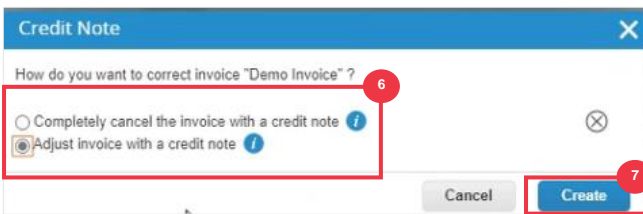



Note: As a best practice, be sure to capture the invoice number as it will be entered later in this process.

5. Click the **Continue** button.

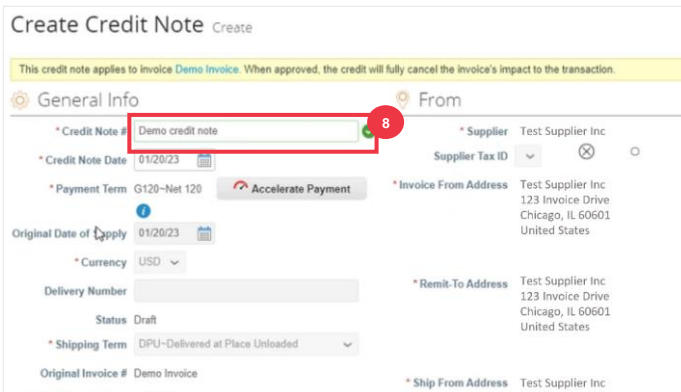


6. Select the appropriate choice from the following radio button options:
 - **Completely cancel the invoice with a credit note**
 - **Adjust invoice with a credit note**
7. Click the **Create** button.



 **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
Shipping	
	0.000
Tax	
	% 0.000
Tax Reference	
Enter a tax reason description.	
Handling	
	0.000
Tax	
	% 0.000
Tax Reference	
Enter a tax reason description.	
Misc	
	0.000
Tax	
	% 0.000
Tax Reference	
Enter a tax reason description.	
Total Tax	0.00
Net Total	-500.00
Total	-500.00

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](#)

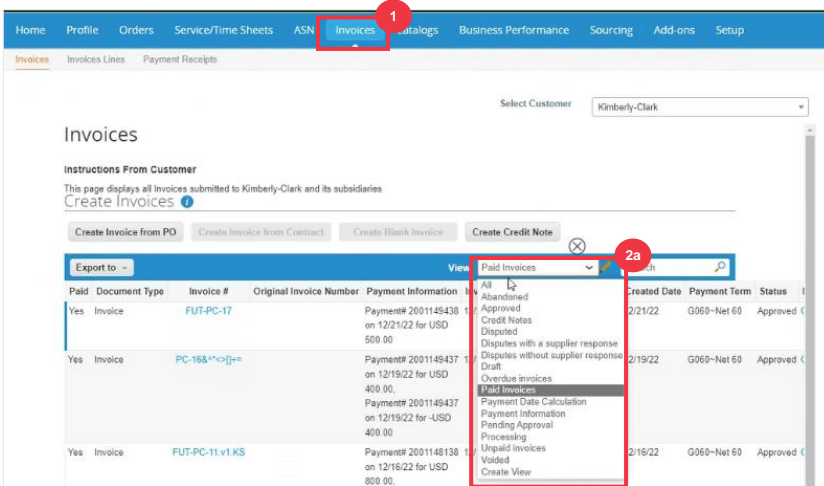
This credit note applies to invoice Demo Invoice. When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info | Bill To & Ship To

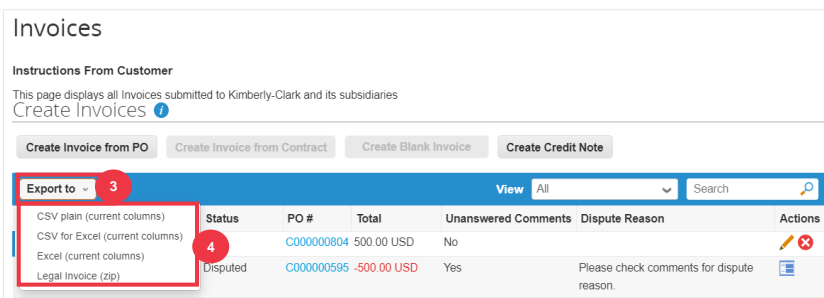
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How to View Payment Confirmation Details in the CSP

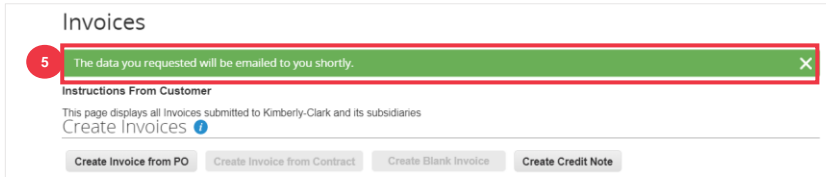
1. From the **CSP home** screen, click the **Invoices** tab.
2. Select a **View** from the drop-down list to filter the invoices that display in the table.
 - a. Payment confirmation views consist of the following:
 - **Overdue invoices**
 - **Paid invoices**
 - **Payment information**
 - **Unpaid invoices**



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.**



The screenshot shows a web interface for 'Invoices'. At the top, there is a green notification banner with a red border and a red circle containing the number '5'. The banner text reads: 'The data you requested will be emailed to you shortly.' Below the banner, the page title is 'Invoices'. Underneath, there is a section titled 'Instructions From Customer' with a sub-header 'Create Invoices' and a small blue information icon. At the bottom of the page, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'.

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