Coupa Supplier Portal (CSP)

Admin and User Guide

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Register for the CSP

You have the following options to register for the CSP:

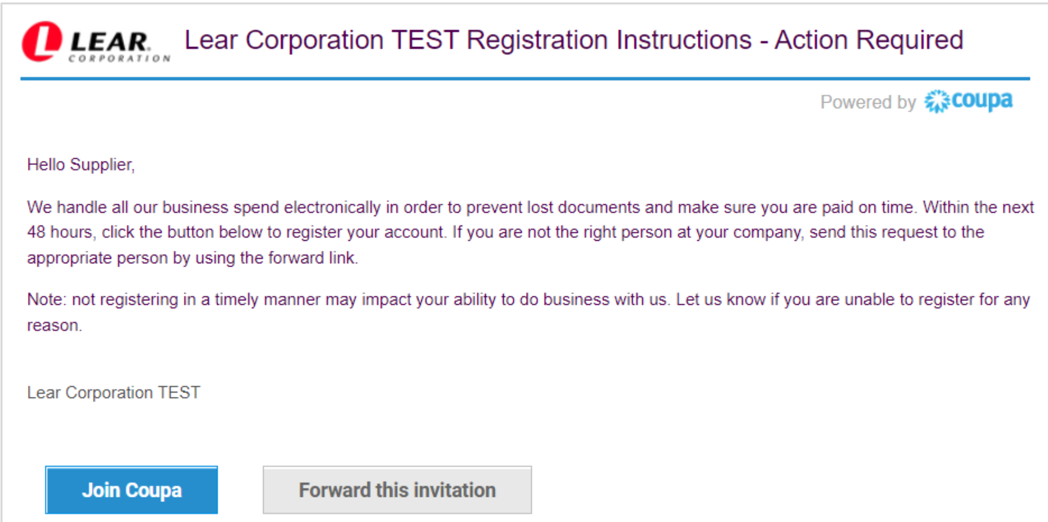
Method	Benefits	Considerations
Customer-created invitation	You get a Lear invitation with specific instructions and a proactive message. When you accept the invitation and create your account, you are automatically connected/linked to Lear.	You have to wait for your Lear contact to send the invitation email. This means that you might not get invited due to your contact forgetting or not having the time to send the invitations to all their suppliers.
Self-created invitation	You can set up your accounts ahead of time, add multiple users, set up your login preferences, and update your profile more quickly.	You need to connect manually to Lear in Coupa. Let your Lear Buyer contact know that you have registered and you want to connect with them. Lear can connect with you through their Supplier Portal Directory, or by sending an invitation email to any of the CSP supplier users on the account. However, if you are invited using a different email, that email can log in but will have to merge with the account that was set up ahead of time in order for all the supplier users to be on the same account and linked to Lear.
Purchase order (PO) email	Lear does not have to proactively manage invitations and reminders for you to get connected through the CSP. You can create a CSP account without requiring an invitation if you receive electronic Coupa PO today.	None
Forwarded invitation from a coworker	You can easily invite others within your organization to the CSP by forwarding them your PO email notification or by sending them an invitation from the create account page. You end up with the right supplier user(s) linked to and transacting electronically through the CSP with less work.	You can forward the invitation only to email addresses with the same domain. However, this ensures more built-in security.

With all methods, you need access to the email address you are going to use for the account.

Your CSP account is based on a specific email address. If you use an email address different from the one Lear currently have on file for you, you cannot connect until you give Lear the updated email address.

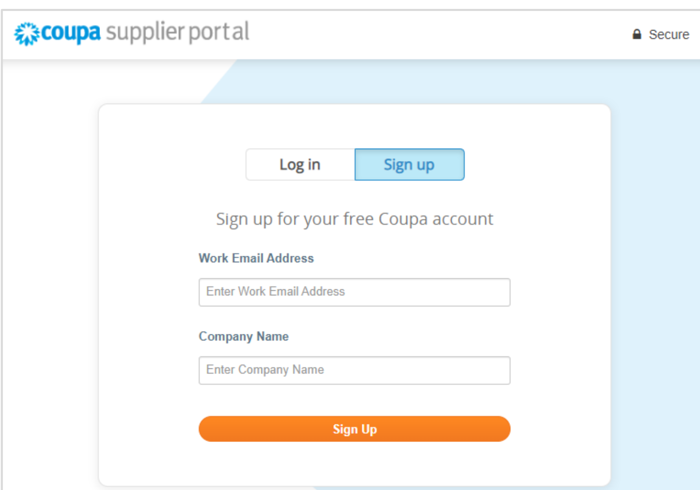
Customer-created invitation

Ask your Lear Buyer contact to send you an invitation to the CSP.



Self-created invitation

Go to supplier.coupahost.com and by clicking **Sign Up**, fill in the fields of **Work Email Address** and **Company Name**, and then click **Sign Up** to request an invitation.



In both cases, you receive an email invitation with a different subject line, depending on whether the invitation was sent by Lear or was initiated by you.

If the email was initiated by Lear, it contains Lear's logo instead of the Coupa logo.

Tip: If you do not receive your invitation email, check your spam folder.

The email contains instructions and links to useful information, and buttons for joining the CSP or forwarding the invitation.

Note: For the new email format, only Microsoft Outlook version 16 is supported.

Forwarded invitation

You can invite others to the CSP by forwarding them your PO email notification with the **Create Account** button, by clicking on the **Forward This** button in your CSP invitation email, or by sending them an invitation from the create account page.

> **Warning:** You can forward the invitation only to email addresses with the same domain.

An invitation to the CSP is sent to the email address that you specified.

When the invited user clicks on the **Join Coupa** button in the email, the user is directed to create an account to the CSP.

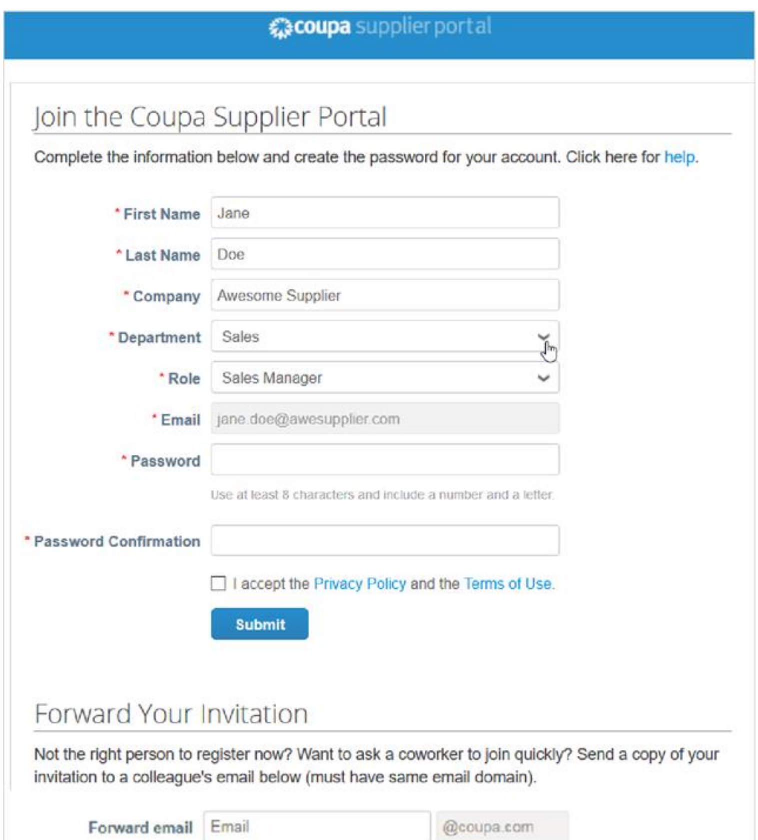
If the user is already linked to the CSP or tries to create an account from an expired invitation, the user is directed to the **Register / Login** page where a red message bar displays the following: "Your invitation has expired or already been activated."

> **Warning:** Invitations to the CSP expire after 30 days.

Create Your Account

Join the CSP

After following the link from an invitation email (other than Lear-created invitation), fill in the mandatory fields to provide basic information for your account and your company's public profile.

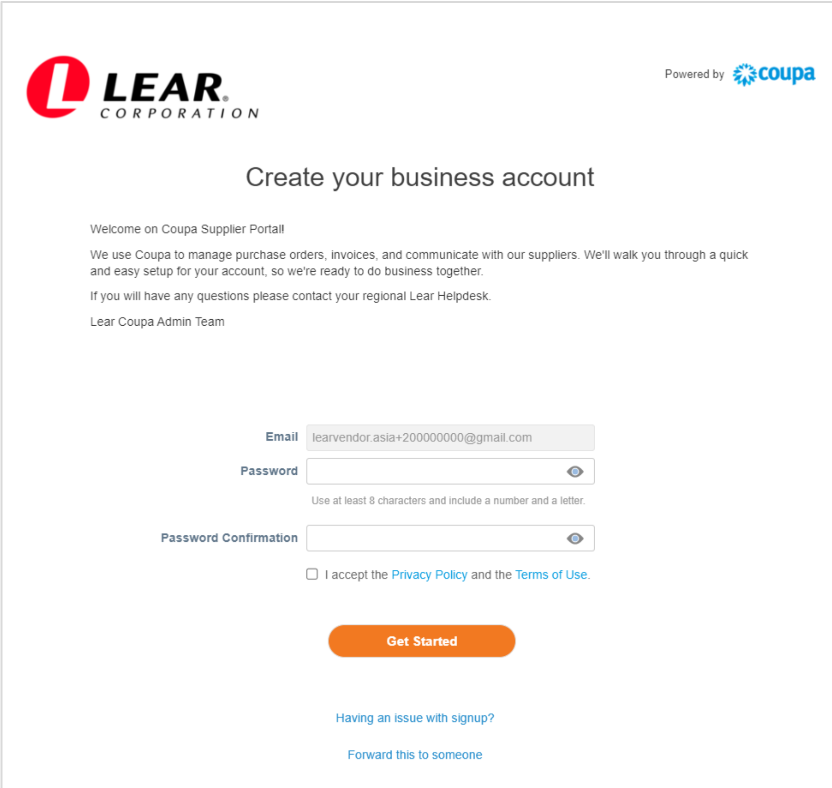


Setting	Description
*First Name	Your personal first name to be applied to your personal account.
*Last Name	Your personal last name to be applied to your personal account.
*Company	The name of your company as seen on your company's public profile.
*Department	The name of your department: Sales, Operations, Accounts Receivable, Treasury, or Other.
*Role	Your role within the department: • Sales: Sales Manager, Sales Associate, Proposal Manager, Other • Operations: E-Commerce Manager, Order Fulfillment/Inventory Management, Other • Accounts Receivable: Accounting Manager, Accounts Receivable Associate, Other • Treasury: Treasury Manager, Other • Other: Enter free text. **Tip:** If you select **Other** for **Department** and/or **Role**, the **User Specified Department** and/or **User Specified Role** fields are displayed for you to enter free text.
*Email	This field cannot be changed. If you want to change your email address, you have to create a different CSP account using the new email address. If you also want to use this email, create two company accounts and merge them. For more information, see Manage Merge Requests.
*Password	Use this field to create your password. It must be at least 8 characters long, and it has to include a number and a letter.
*Password Confirmation	This field needs to match the password you typed in the password field.

Note: If you join the CSP from one of two simultaneous invitations received from your administrator and your customer, you might see a green box with a question asking whether you are an employee of the supplier organization and you need to select either the **Yes – Join** or **No – Create New Account** checkbox.

Welcome message

When you join the CSP from a Lear invitation, you can see a registration page that is different from the page shown above. The **Create your business account** page contains the following welcome message and company logo by default.



You need to enter password and accept the Privacy Policy and the Terms of Use. You can get help to sign up or you can forward the invitation to others by clicking on the relevant links.

> **Tip:** You can update your information later on the **My Account Settings** page. For more information, see Manage Your Account.

By default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration. For more information, see Administer the CSP.

Forward your invitation

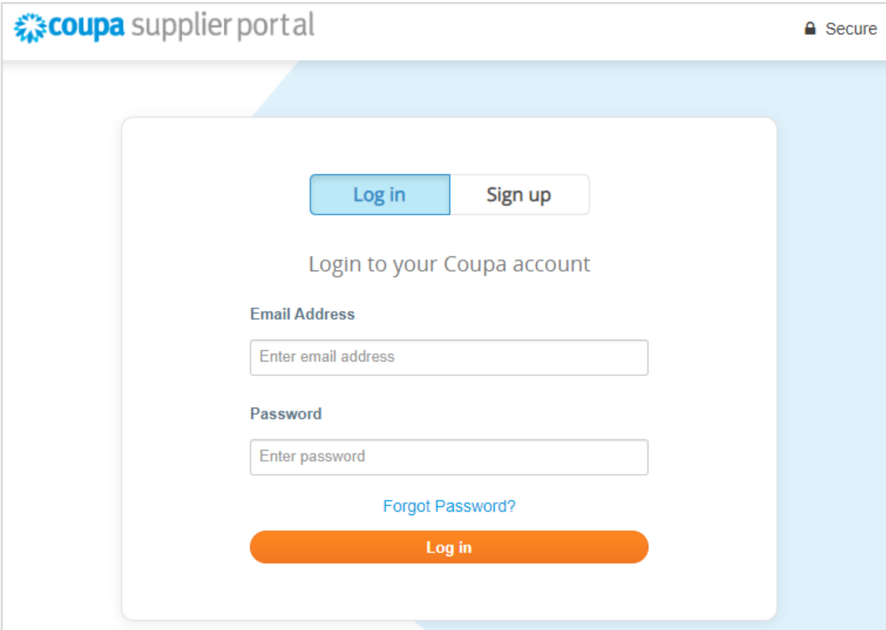
You can invite others any time by entering their email address in the **Forward email** field in the **Forward your invitation** section and clicking **Submit**, or by clicking on the **Forward this to someone** link if you see the welcome message.

For more information, see Register for the CSP.

Log in to the CSP

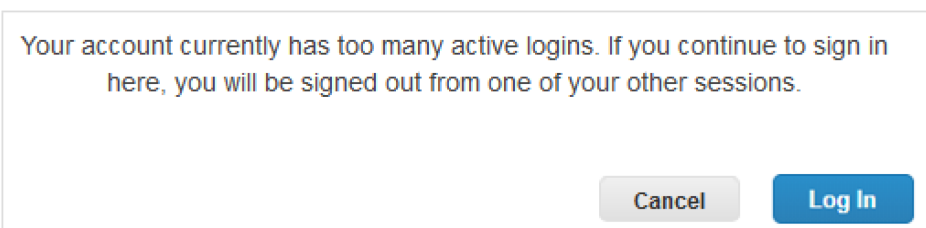
Login page

Go to supplier.coupahost.com and in the **Log in** tab, enter your email address and password and click **Log In**.



Multiple active sessions

You cannot have more than three active sessions simultaneously. When you log in to another session, you are forced to close an open one. A message notifies you that you have too many active logins and you will be signed out from one of your other sessions if you click **Log In**. You can also **Cancel** the attempt to log in to another session.



Inactivity

Your account is deactivated automatically if it is inactive for a defined period of time, that is, if:

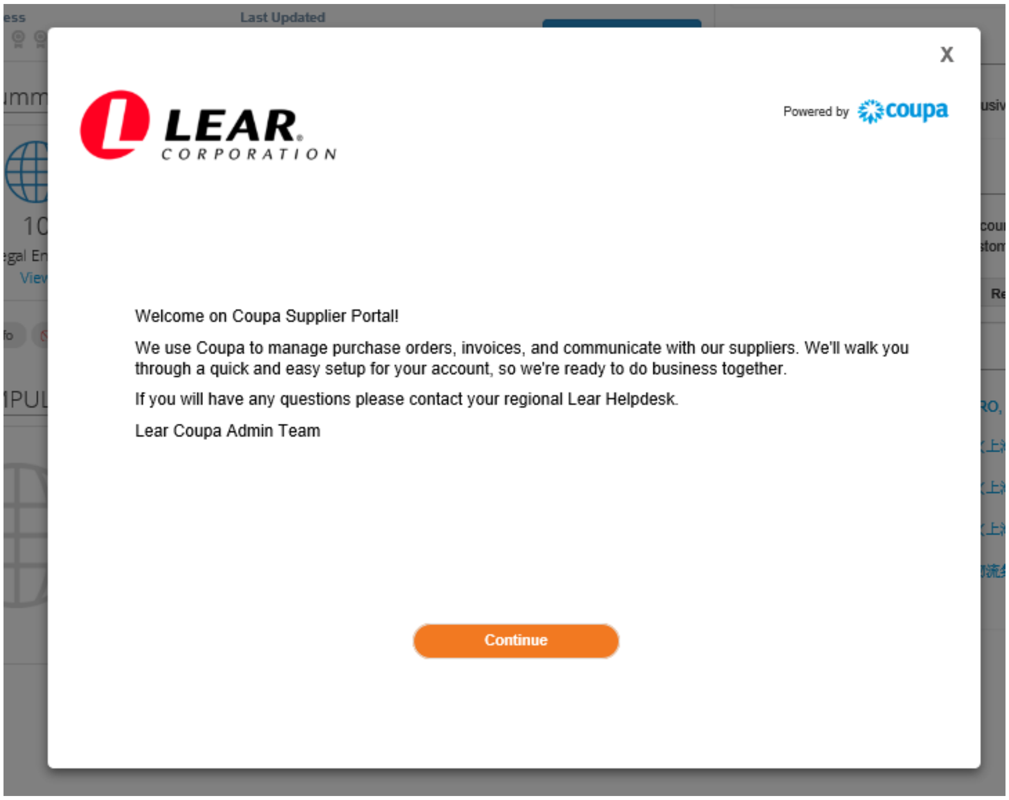
- You have not logged in to the CSP for more than 90 days.
- You have not verified your account for 6 months.

You receive an email notification with the subject "Your CSP Account is Inactive." To keep your account active, you need to log in to the CSP.

When you try to log in as an inactive user, a red message bar notifies you of the verification email you received. To reactivate your account, you need to confirm that email. On the CSP login page, a green message bar informs you of the successful email verification and you can log in. For more information, see Log in to the CSP.

Welcome message

When you log in for the first time from a new Lear invitation, you can see the following welcome message and company logo by default.

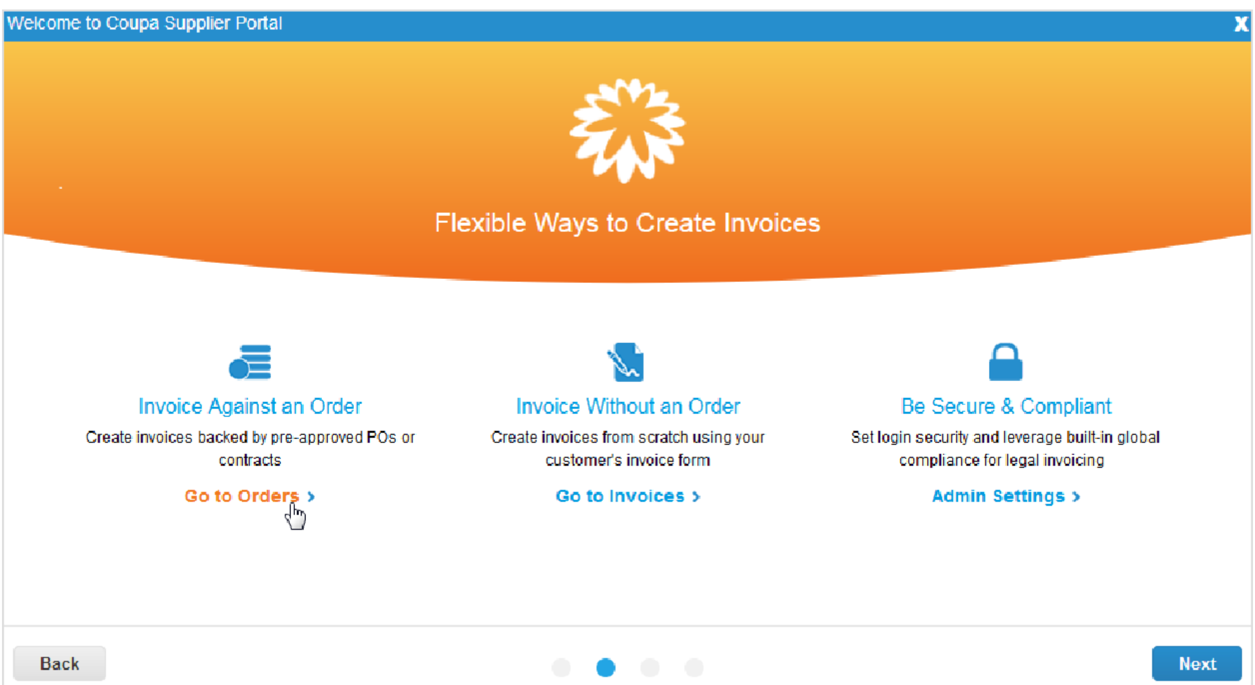


Welcome tour

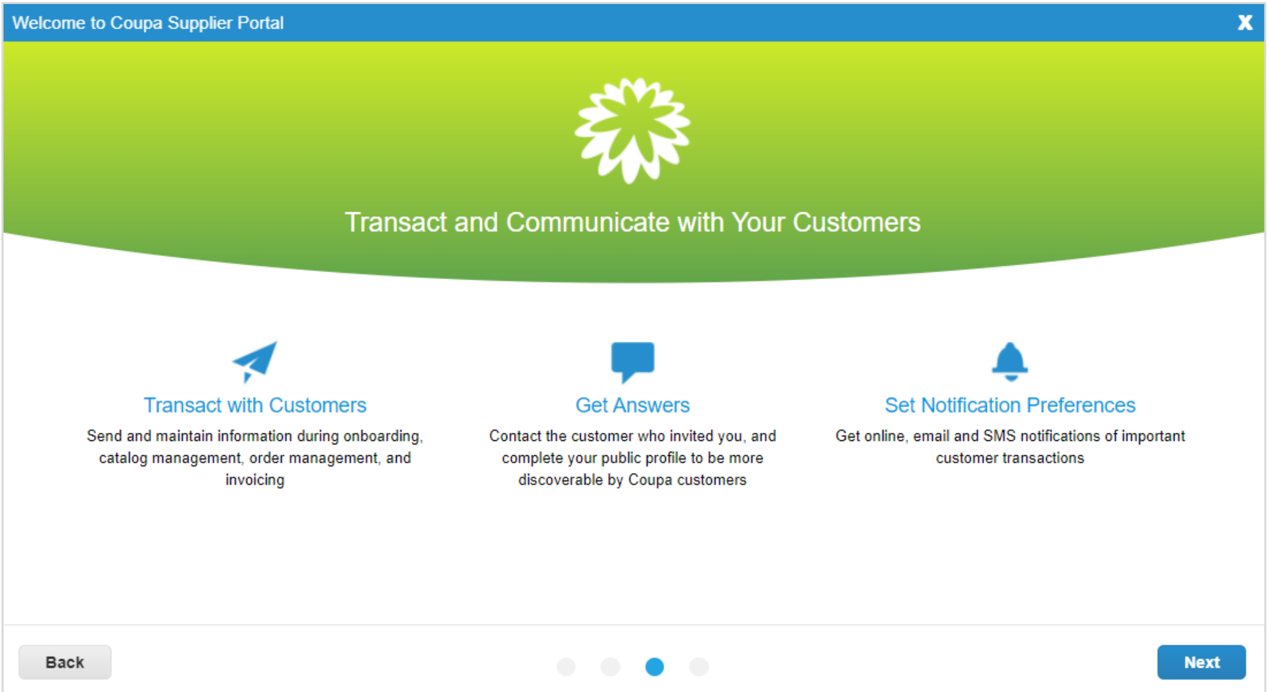
Once you are signed in, Coupa takes you on a welcome tour.

> **Note:** If you log in from a new Lear invitation, the welcome tour is shown after the welcome message, and you can also access it from the **Help** menu (in the top right corner) **> Help Tour**. For more information, see Navigate and Get Help.

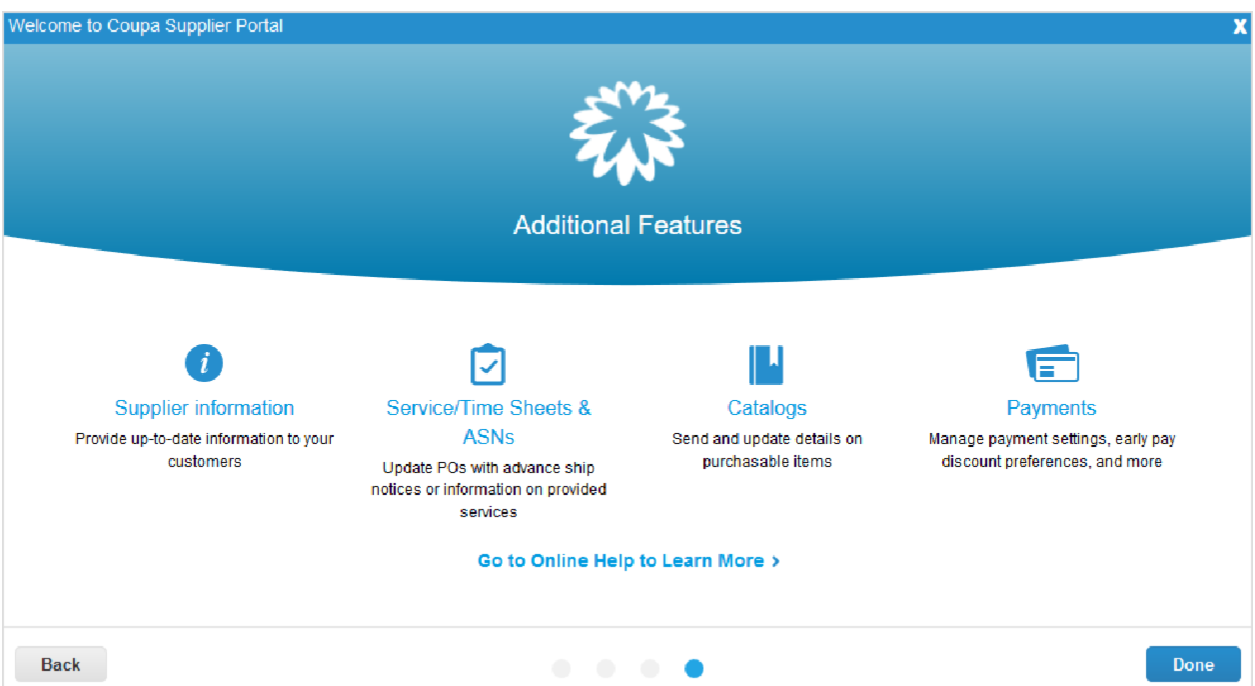
You can skip the tour by clicking on the **Skip** button or closing the window with the **X** in the top right corner. Clicking **Next** takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



By clicking on the relevant link, you can go directly to view the **Orders**, **Invoices**, or **Admin** pages, or go to the next tour page that provides basic information about how the CSP can help you transact and communicate with Lear, for example, by allowing you to manage your catalogs, orders, and invoices, and setting notification preferences for important transactions.

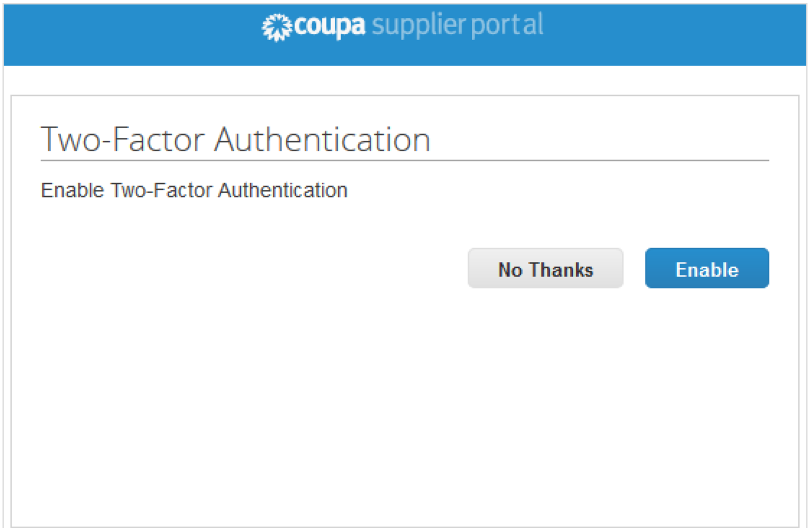


The fourth (last) page of the tour summarizes the additional features, for example, the possibility to provide supplier information through the CSP, update POs with advance ship notice (ASN), update catalog items, and features for payments, such as, managing payment settings (Lear have not implemented all of these Coupa functions at the moment). If you click on the **Go to Online Help to Learn More** link, you are directed to the Coupa Supplier Portal Admin and User Guide for details on each feature.



Two-factor authentication

When you log in for the first time, you could be prompted to enable two-factor authentication. For more information, see Enable or Disable Two-Factor Authentication.



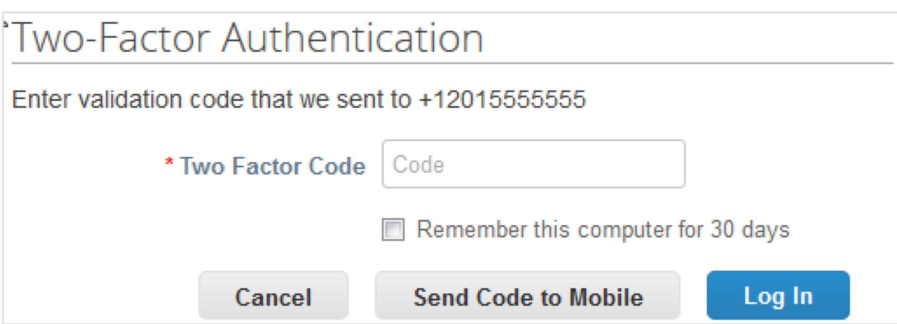
Note: In Lear's instance, two-factor authentication is not a mandatory requirement. It's at supplier's own discretion to enable this function or not.

Log in with two-factor authentication

If you have enabled two-factor authentication, the **Two-Factor Authentication** window opens when you want to log in to the CSP.

If you enabled the **Two-Factor Authenticator App**, choose open Google Authenticator on your device, choose your CSP account, and get the validation code.

If you enabled two-factor authentication for SMS, check your text messages to get the verification code.



Type the two-factor authentication code in the appropriate field, choose **Remember this computer for 30 days** if you are not using a shared or public computer, and click **Log In**.

Note: The code is good only for 60 seconds. If you do not type that code on the CSP sign-in page and click **Log In** within 60 seconds, you have to get a new code and try again.

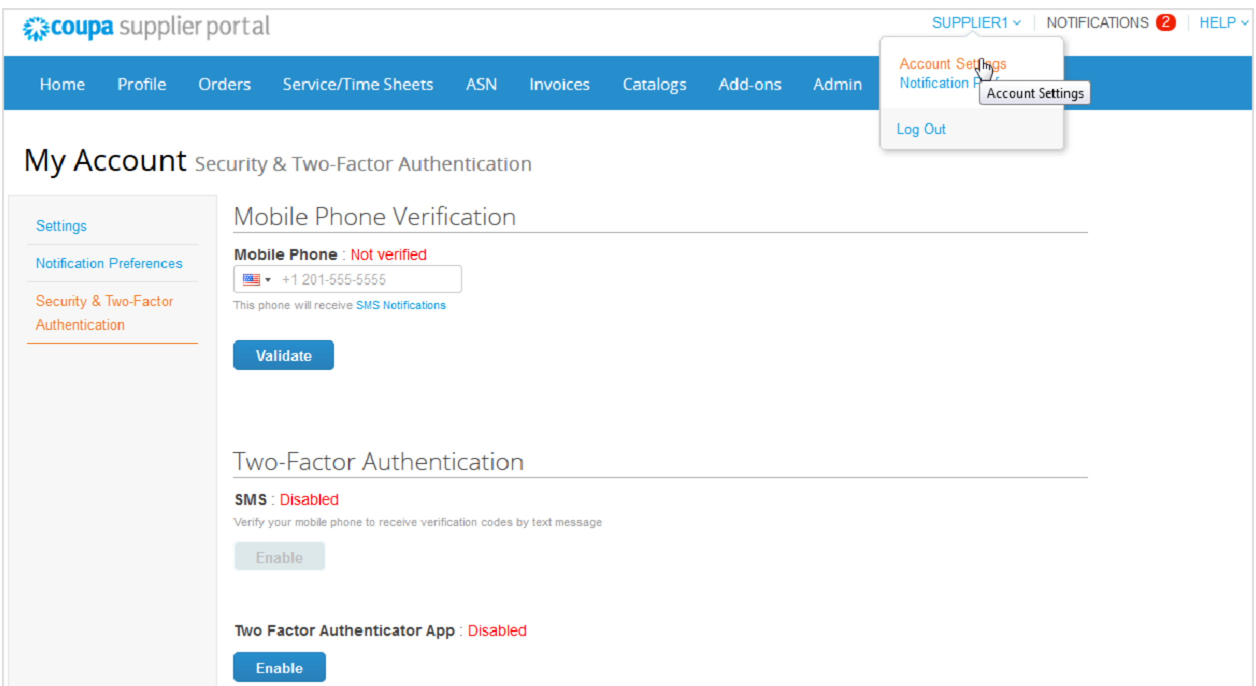
For more information, see Enable or Disable Two-Factor Authentication.

Note: If you are locked out and you do not have your six-digit backup validation code, contact Lear system admin team who will ask for a declaration form sent from your email used to log in to the CSP to verify your identity.

Enable or Disable Two-Factor Authentication

On the **My Account** page, click on the **Security and Two-Factor Authentication** link to enable or disable two-factor authentication.

Note: In Lear's instance, two-factor authentication is not a mandatory requirement. It's at supplier's own discretion to enable this function or not.

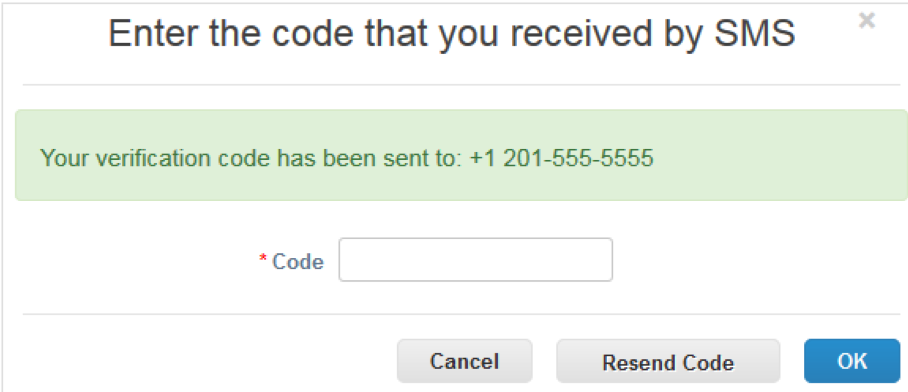


Enable two-factor authentication

Note: If you want to receive SMS notifications or verification codes, you must enter and validate your phone number under **Mobile Phone Verification**.

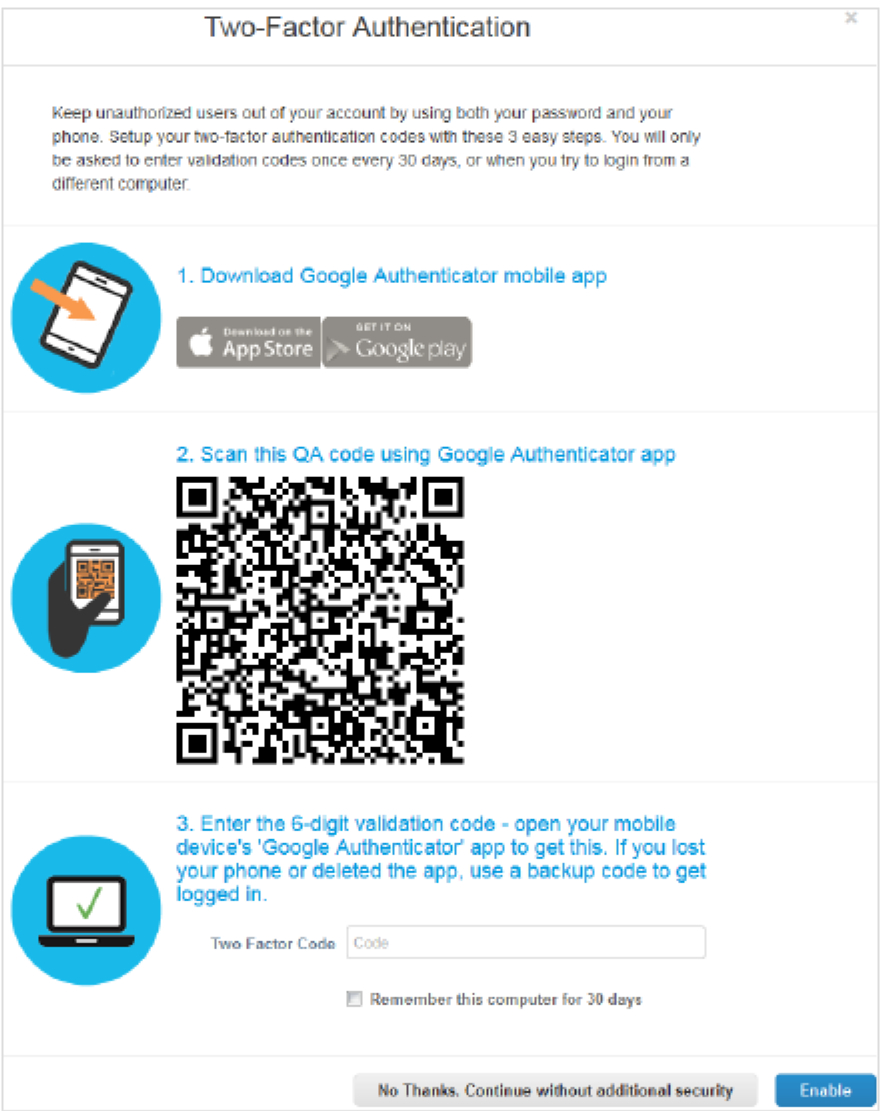
Under **Two-Factor Authentication**, click **Enable** for **SMS** or for **Two Factor Authenticator App** depending on how you want to receive the verification codes.

- For SMS, enter the verification code in the pop-up window.



After successful validation, you receive the verification codes in text messages.

- For installing and using Google Authenticator, follow the on-screen instructions.



Choose **Remember this computer for 30 day** if you are not using a shared or public computer, and click **Enable**.

Print your backup codes or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

> **Note:** You can only use a recovery code once, so refresh your list if you have to use a recovery code. Go to **Account Settings > Security & Two-Factor Authentication** and click **Regenerate Recovery Codes** to get a new list of codes.

Disable two-factor authentication

Under **Two-Factor Authentication**, click **Disable** for **SMS** or for **Two Factor Authenticator App** and, in the appearing window, enter your CSP password and click **Disable Two-Factor Authentication**.

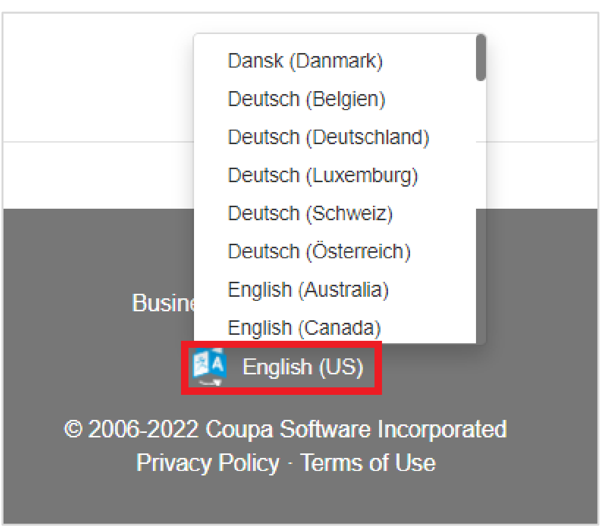
If you enable or disable two-factor authentication, you get an email notification of the change.

Supported Languages in the CSP

The Coupa Supplier Portal (CSP) user interface is available in several languages. When accessing the CSP, you can select different language and region combinations.

Change languages

To change the CSP UI language, select the language picker at the bottom of the page and choose your preferred language and region.

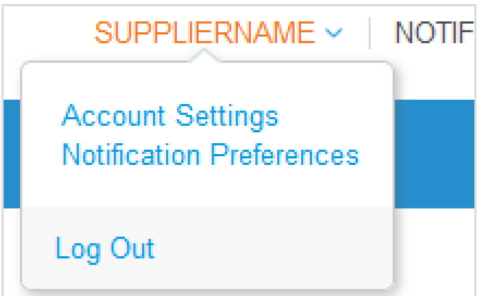


Manage Your Account

On the **My Account Settings** page, you can make changes to your personal information (name, department, role, and password), set or modify your notification preferences, or enable/disable two-factor authentication.

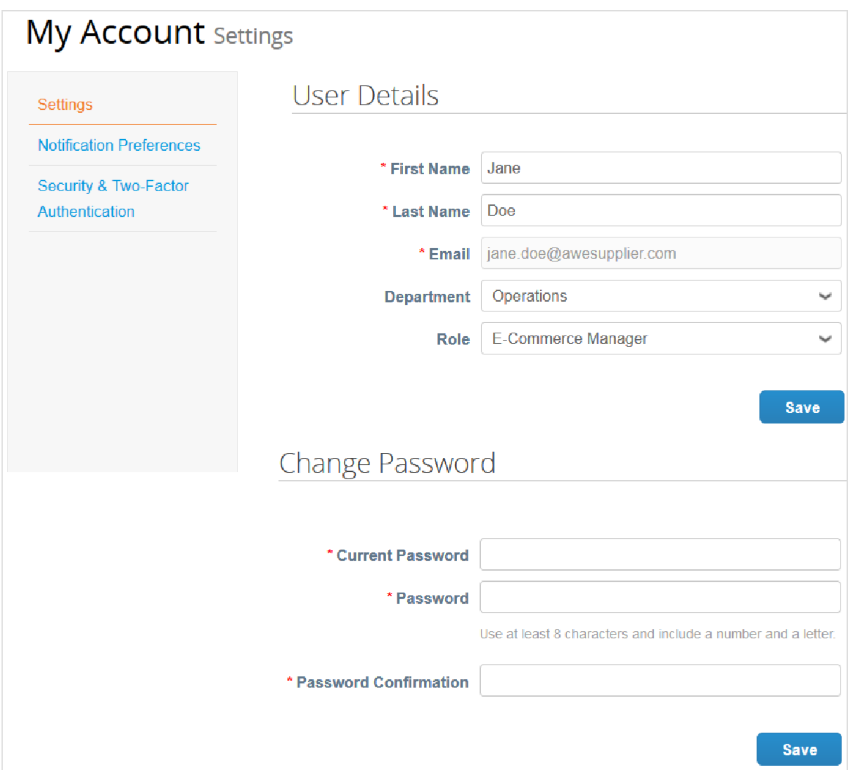
> **Note:** You can access and edit you company information on the Profile page.

To change your account settings, click on your name link and on the **Account Settings** link.



Personal information

On the appearing **My Account Settings** page, fill in the fields you want to change, and then click **Save**. The asterisk (*) indicates mandatory fields.



Setting	Description
User Details	
*First name	This is your personal first name.
*Last name	This is your personal last name.
*Email	This field cannot be changed. If you want to change it, you have to create a new CSP account and connect it to your company. For more information, see Manage Users.
Department	The name of your department: Sales, Operations, Accounts Receivable, Treasury, or Other.
Role	Your role within the department: • Sales: Sales Manager, Sales Associate, Other • Operations: E-Commerce Manager, Order Fulfillment/Inventory Management, Other • Accounts Receivable: Accounting Manager, Accounts Receivable Associate, Other • Treasury: Treasury Manager, Other • Other: Enter free text. **Tip:** If you select **Other** for **Department** and/or **Role**, the **User Specified Department** and/or **User Specified Role** fields are displayed for you to enter free text.
Change Password	
*Current Password	Your current password.
*Password	Use this field to change your password. It must be at least 8 characters long and it must include a number and a letter.
*Password Confirmation	This field needs to match the password that you typed in the Password field.

Click on the **Notification Preferences** link to set or modify your notification preferences. For more information, see View and Manage Notifications.

Click on the **Security & Two-Factor Authentication** link to enable/disable two-factor authentication. For more information, see Enable or Disable Two-Factor Authentication.

Create or Update Your Profiles

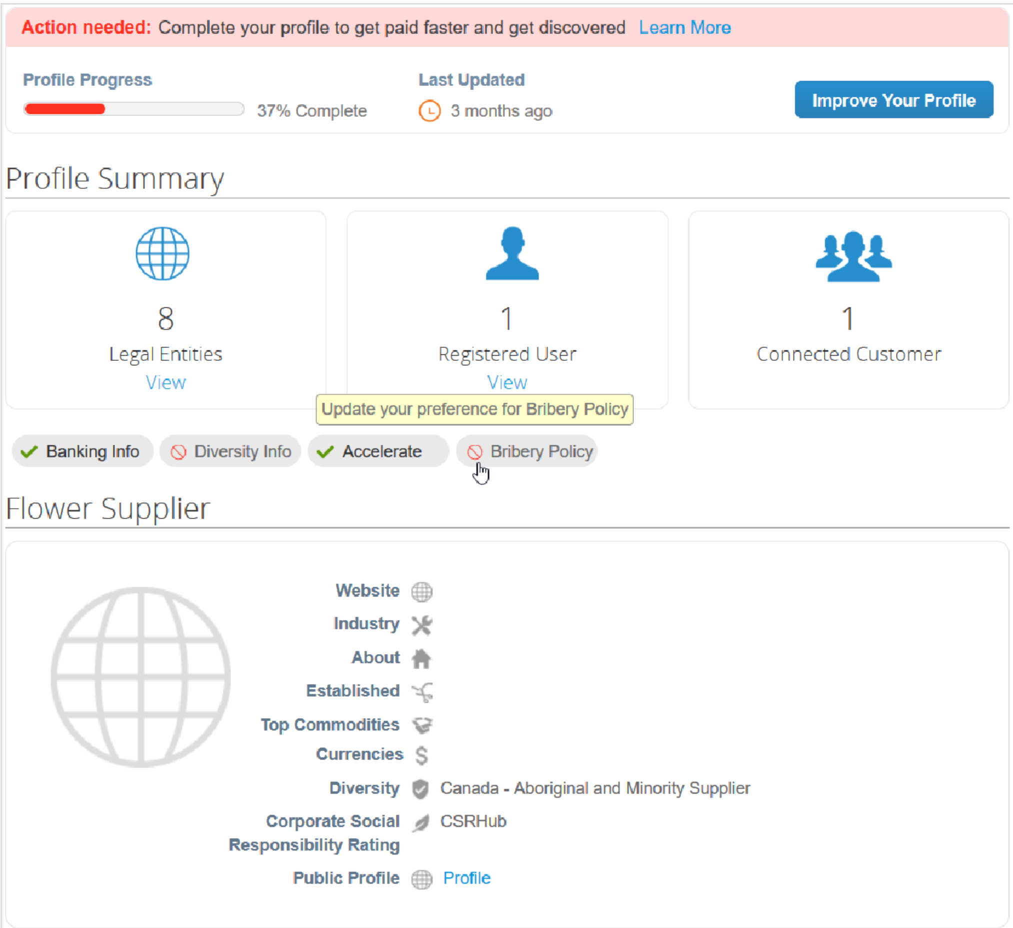
In the CSP, you have a public profile and you can have specific profiles for each customer that you are connected with through the CSP.

You can view and update your public and customer-specific profiles from the **Home** page or the **Profile** page.

Update your public profile

Anyone can find and connect with you through your public profile.

Your public profile is created when you create your account and it contains general information about your company, for example, name, logo, website, industry, year of establishment, top commodities, currencies, diversity, and corporate social responsibility rating (on the **Home** and **Profile / Public Profile** pages), the link to your public profile (on the **Home** page), and contact information (on the **Profile / Public Profile** page).



Profile progress

At the top of the **Home** page, you can see your profile progress/completeness.

The following table shows the profile completeness stages.

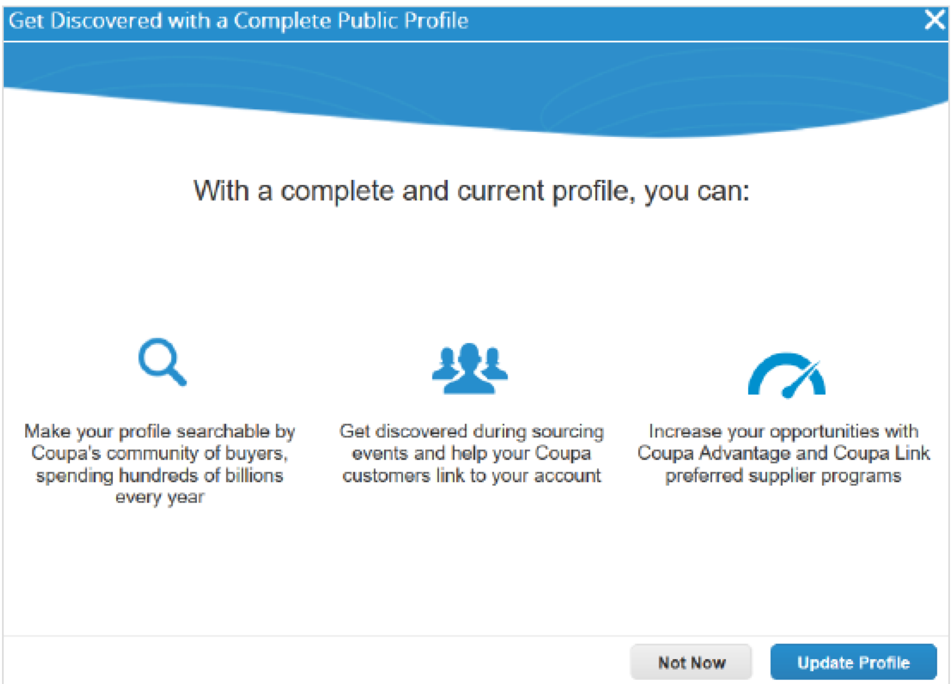
Profile Progress Bar Color	Message
Red	**Action needed:** Complete your profile to get paid faster and get discovered.
Blue	**Recommended:** Complete your profile to get paid faster and get discovered.
Green	**Great job!** A complete profile helps you get paid faster and get discovered.

Next to the progress bar, the **Last Updated** field shows how long ago the profile was updated, for example, 2 minutes ago or 10 days ago.

The following table shows the color of the progress bar depending on the age of the profile.

Percentage of Completeness	Last Updated < 1 Year Ago	Last Updated 1-2 Years Ago	Last Updated > 2 Years Ago
< 50%	Red	Red	Red
50% - 80%	Blue	Blue	Red
80% - 100%	Green	Blue	Red

The **Learn More** link next to the profile progress message opens the **Get Discovered with a Complete Public Profile** popup with tips and information on the benefits of a complete public profile.



Clicking **Update Profile** opens your public profile for editing.

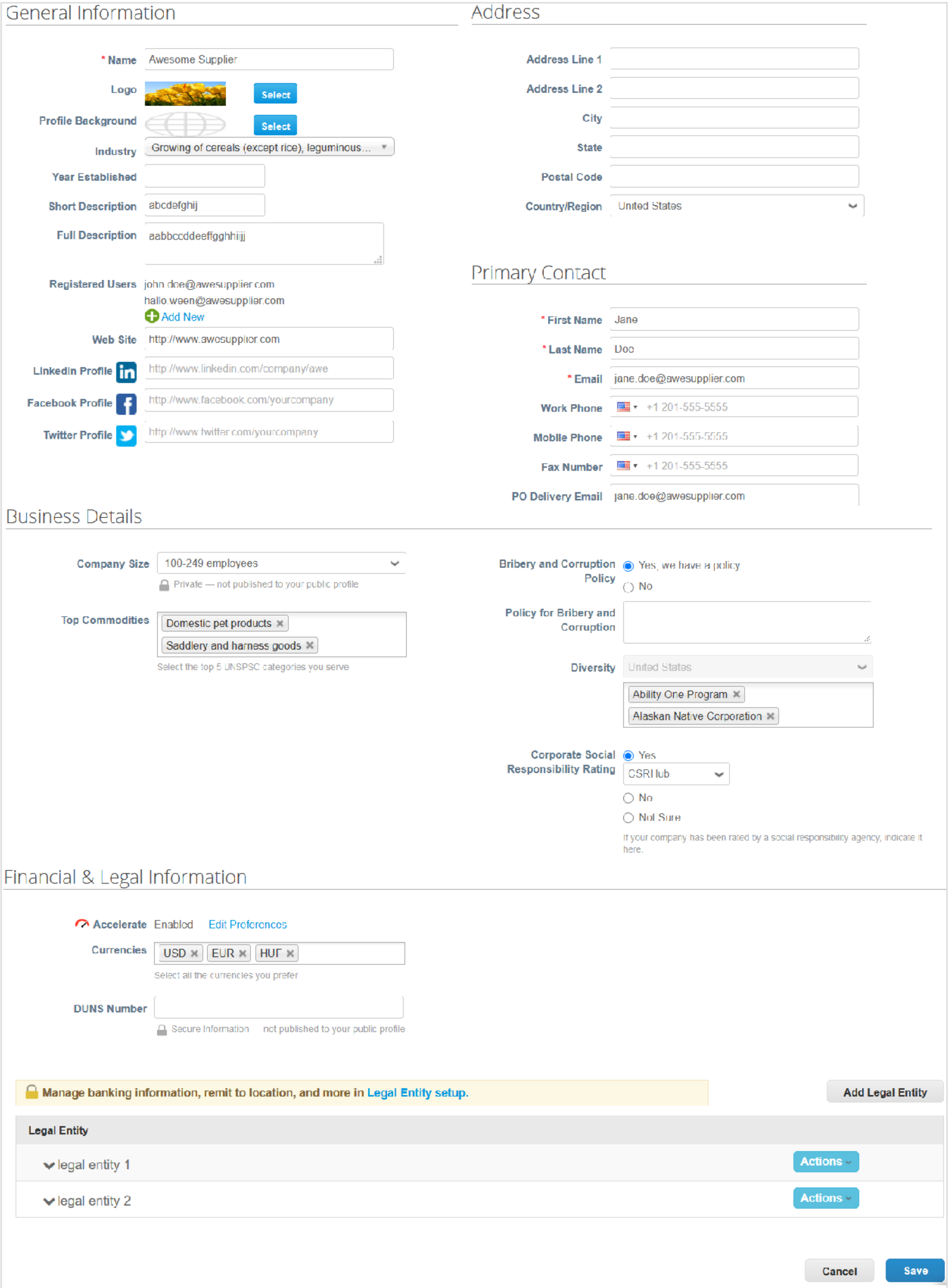
Profile summary

Under the section about your profile progress, you can see an actionable profile summary, which shows the number of legal entities and registered users based on the information provided in your profile, and the number of connected users, that is, the number of customers linked to your profile.

Clicking on the **View** link under **Legal Entities** takes you to the **Admin / Legal Entity Setup** page where you can add, update, or deactivate legal entities.

Clicking on the **View** link under **Registered Users** directs you to the **Admin / Users** page where you can invite new or manage existing users.

The profile summary also indicates if you have ( ) or have not ( ) provided banking and diversity information, if you accelerate orders/invoices, and if you have a bribery policy.


General Information
* Name
Awesome Supplier
Logo
Select
Profile Background
Select
Industry
Growing of cereals (except rice), leguminous...
Year Established
Short Description
abcdefghij
Full Description
aabbccddeeffgghhiijj
Registered Users
john.doe@awesupplier.com
hallo.ween@awesupplier.com
Add New
Web Site
http://www.awesupplier.com
LinkedIn Profile
http://www.linkedin.com/company/awe
Facebook Profile
http://www.facebook.com/yourcompany
Twitter Profile
http://www.twitter.com/yourcompany
Address
Address Line 1
Address Line 2
City
State
Postal Code
Country/Region
United States
Primary Contact
* First Name
Jane
* Last Name
Doe
* Email
jane.doe@awesupplier.com
Work Phone
+1 201-555-5555
Mobile Phone
+1 201-555-5555
Fax Number
+1 201-555-5555
PO Delivery Email
jane.doe@awesupplier.com
Business Details
Company Size
100-249 employees
Private — not published to your public profile
Top Commodities
Domestic pet products
Saddlery and harness goods
Select the top 5 UNSPSC categories you serve
Bribery and Corruption Policy
Yes, we have a policy
No
Policy for Bribery and Corruption
Diversity
United States
Ability One Program
Alaskan Native Corporation
Corporate Social Responsibility Rating
Yes
CSRHub
No
Not Sure
If your company has been rated by a social responsibility agency, indicate it here.
Financial & Legal Information
Accelerate
Enabled
Edit Preferences
Currencies
USD
EUR
HUF
Select all the currencies you prefer
DUNS Number
Secure Information — not published to your public profile
Manage banking information, remit to location, and more in Legal Entity setup.
Add Legal Entity
Legal Entity
legal entity 1
Actions
legal entity 2
Actions
Cancel
Save

Navigate and Get Help

Help

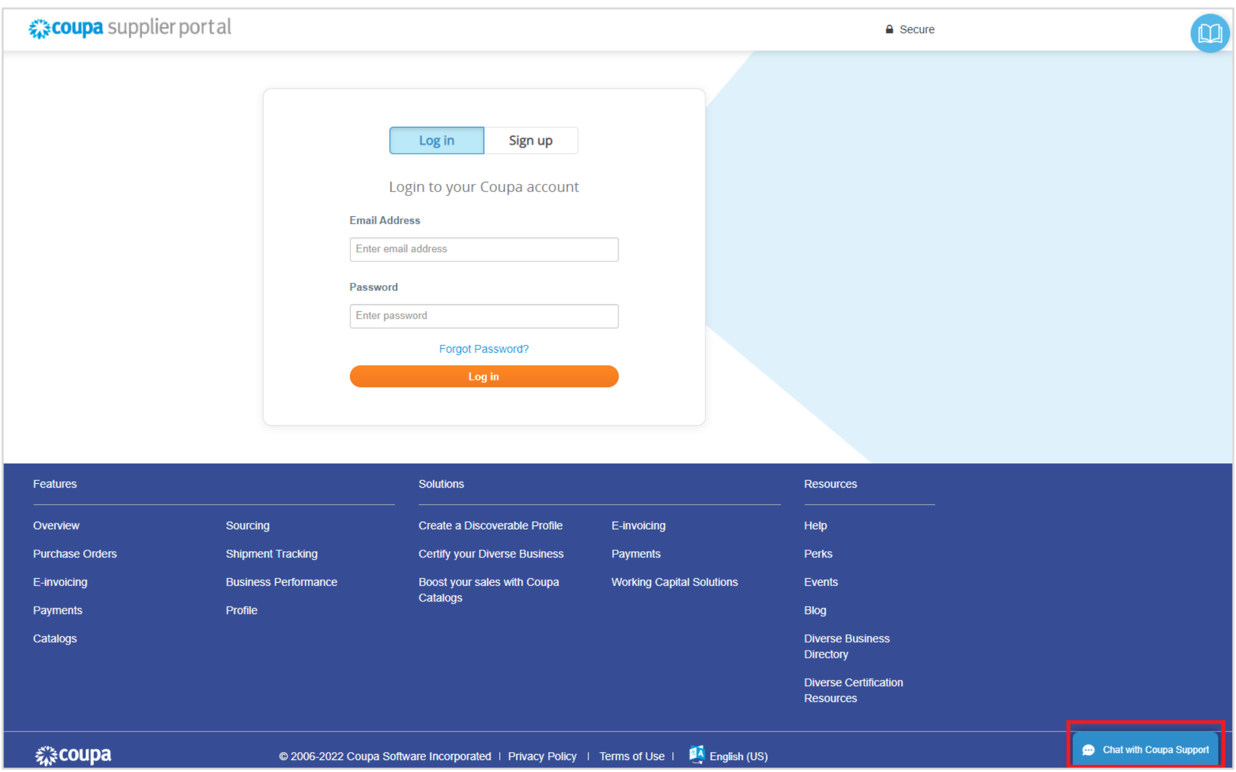
Contact Lear Coupa System Admin Team

Email to CoupaSupplierAsia@lear.com This is the Lear system administration team that can help you on your questions relating to transacting with Lear in CSP. They can cover questions mainly on the technical side. And if it more business/commercial related, it's better to reach out to your Lear Buyer/Plant contacts.

Contact Coupa Support (This is Coupa as a company, not Lear)

1. Chat with Coupa Support

Whether you are logged in to the CSP or not, you can chat with Coupa Support (from Coupa Company) to get a quick response or resolution to your case. Click **Chat with Coupa Support** in the bottom right corner of the page to launch the chat.

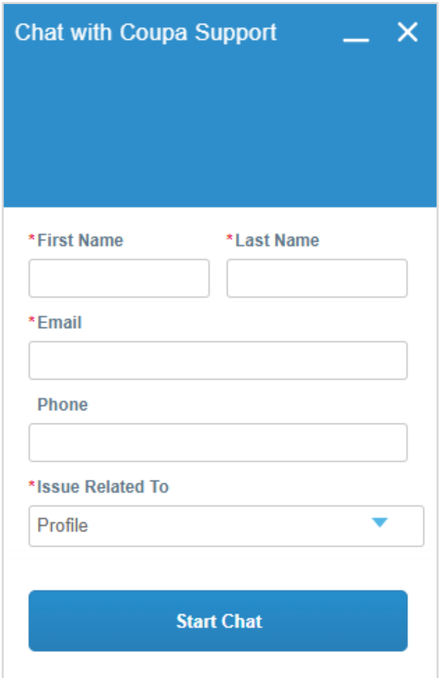


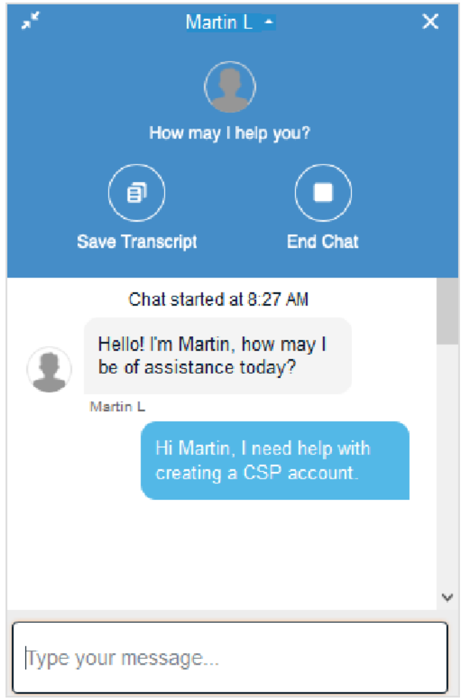
> **Note:** If all the support agents are offline or busy, you can **Send a support request** through an offline form in the same chat window.

Provide your contact information: first name, last name, email address, and phone number (optional).

Start chatting with the support agent

> **Tip:** If you are logged in to the CSP, your contact information is pre-populated, but you can modify it.





Note: If no support agent is available, you also need to provide the subject of your request and a detailed issue description, after which you can see a confirmation that your case was submitted and logged. A support agent contacts you as soon as they are available.

If the support agent asks you to send a file, a paperclip icon appears on the left of the field where you type your message.

Note: Your account and login information is not stored and support agents cannot log in to your CSP. However, information provided in the chat is logged, so do not provide unnecessary personal information.

When you browse, the chat window persists on all the pages except for your **Public Profile** page, and you can minimize it by clicking on the opposite arrows icon in the top left corner.

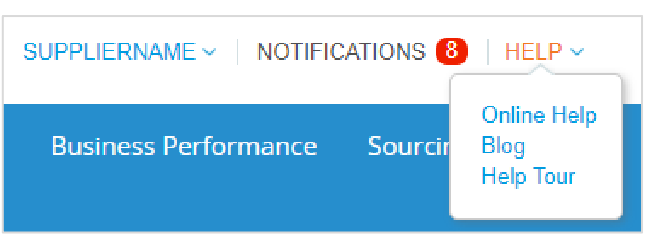
The chat is available also when accessing the CSP from a mobile device.

2. Online Help, Blog, and Help Tour

When you log in for the first time, you are greeted by the **Help Tour** (welcome tour) on the **Home** screen.

Click on the **Help** link in the top right corner of the page to view the **Help Tour** any time.

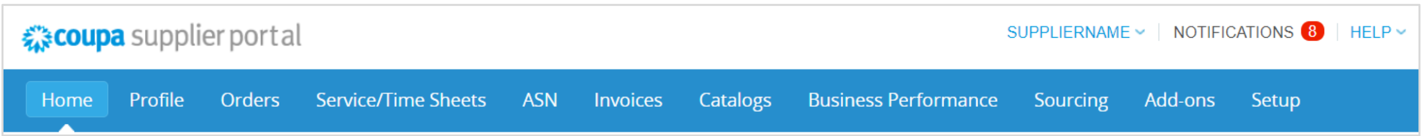
You can also use the **Blog** and **Online Help** links to learn more about the CSP.



Main menu

> **Note:** IE browser is already end of life. Try not to use IE but other browsers like Chrome or Edge.

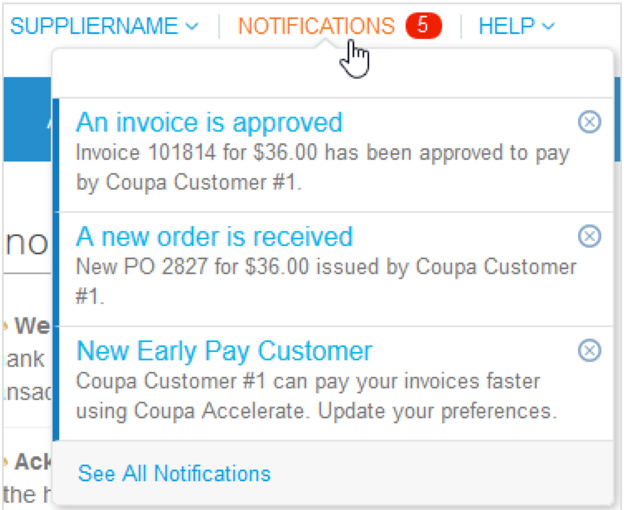
To access a CSP function, click on the relevant tab on the main menu at the top of the CSP main page.



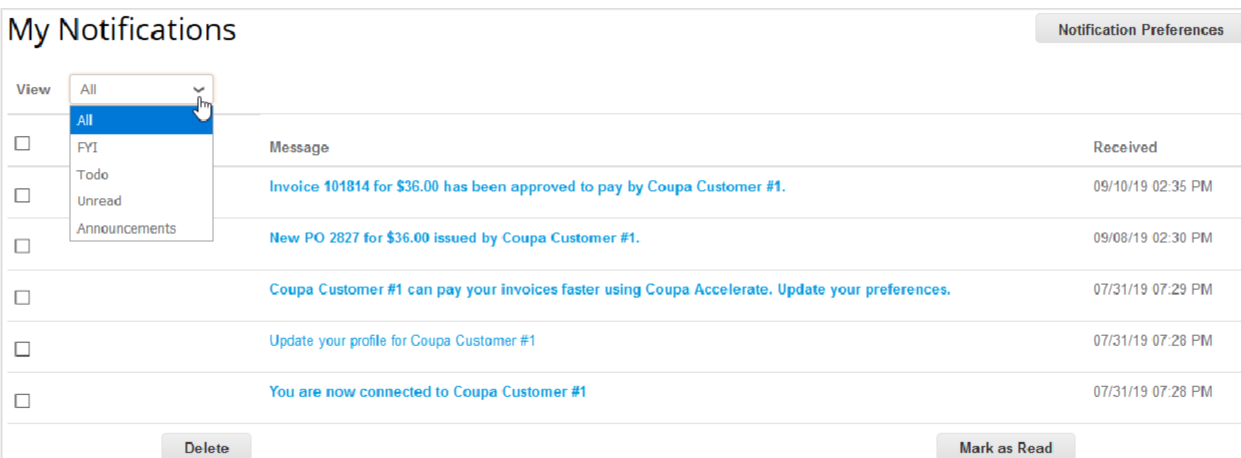
Menu Item	Description
Home	View and improve your public company profile, see the list of customers you are connected to, edit your customer-specific company profile, and merge accounts. You can go to the **Home** page from any page by clicking on the **coupa supplier portal** logo/link in the top left corner above the main menu.
Profile	Create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
Orders	View the purchase orders you received from your customers.
Service/Time Sheets	View the list of service/time sheets and related purchase order lines.
ASN	Send advance ship notice, that is, notifications about when you ship items to your customers.
Invoices	Create and manage invoices to send to your customers.
Catalogs	Create and manage customer-specific catalogs.
Payments	Accept payment through digital checks from your customers if they use Coupa Pay.
Business Performance	View a summary of orders and invoices that may need attention, your year-to- date order and invoice trends, and your lead time to shipping goods.
Add-ons	Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.
Setup	Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use, and set preferred accelerated payment terms.

View and Manage Notifications

Hover your cursor over the **Notifications** link to see your unread system notifications. Only the three most recent notifications are shown.



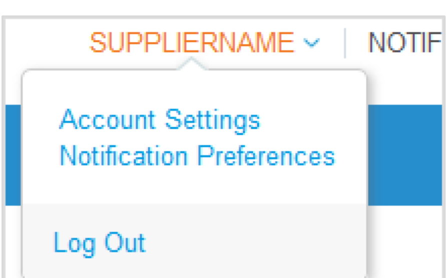
To view all the notifications with their details and to manage them, click on the **Notifications** or the **See All Notifications** link.



On the **My Notifications** page, you can view all your (read and unread) notifications, or you can filter by category (FYI, To-do, Unread, or Announcements). You can select and delete them all or one-by-one.

Clicking on a notification link takes you to the relevant page.

To change your notification preferences, click on the **Notification Preferences** button in the top right corner. Or click on your name link and on the **Notification Preferences** link.



You can access the notification preferences also from your **Account Settings**. For more information, see Manage Your Account.

On the **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive any or all of the notification types: online (to do list), email, or SMS (short text message). You will start receiving notifications when your customers enable them.

SMS notifications are turned off by default.

If you turn SMS notifications on, but you disable mobile phone verification, your SMS notification selections are deleted. You can also stop receiving SMS notifications if you reply STOP.

Setting	Description
Announcements	
New Customer Announcement	Enabled by default: Online and Email **Note:** You cannot disable online notifications for announcements.
Business Performance	
Business Performance role granted	Enabled by default: Online
Catalogs	
A new comment is received	Enabled by default: Online and Email
A catalog is approved	Disabled by default.
A catalog is rejected	Disabled by default.
A catalog is about to expire	Disabled by default.
Coupa Accelerate	
New Early Pay Customer	Enabled by default: Online and Email
Coupa Pay – Available only if your customer uses Coupa Pay and enabled the related features.	
New digital check	Enabled by default: Online and Email
New virtual card	Enabled by default: Online and Email
Virtual card reissued	Enabled by default: Online and Email
Virtual card reminder	Enabled by default: Online and Email
Payment role given to user	Enabled by default: Online and Email
Virtual card processing failure	Enabled by default: Online and Email
Bank transfer remittance advice	Enabled by default: Online and Email
Virtual card remittance advice	Enabled by default: Online and Email

Setting	Description
Zero payment remittance advice	Enabled by default: Online and Email
Digital Check Cancelled	Enabled by default: Online and Email
Virtual Card Cancelled	Enabled by default: Online and Email
Early Payments – Available only if your customer enabled the feature.	
Early payment request expired	Enabled by default: Online and Email
Early payment request rejected	Enabled by default: Online and Email
Early payment request matched	Enabled by default: Online and Email
Early payment request paid	Enabled by default: Online and Email
Form Responses	
A form response is approved	Enabled by default: Online and Email
A form response is rejected	Enabled by default: Online and Email
Supplier information is updated	Enabled by default: Online and Email
A new comment is received	Notifies you if your customer sends you a new comment or a reply to your question/comment regarding a Supplier Information Management (SIM) form request/response. Enabled by default: Online and Email
A form response needs your attention	Enabled by default: Online and Email
Integration Errors	
Enable notification for integration error	Disabled by default.
Invoices	
A new comment is received	Enabled by default: Online and Email
An invoice is approved	Enabled by default: Online and Email
An invoice is paid	Enabled by default: Online and Email
An invoice is disputed	Enabled by default: Online and Email
An invoice is withdrawn from dispute	Enabled by default: Online and Email
Legal Invoice Export Ready	Enabled by default: Online and Email
An invoice is abandoned	Enabled by default: Online and Email
Orders	
A new comment is received	Enabled by default: Online and Email

Setting	Description
A new order is received	Enabled by default: Online and Email
An order is canceled	Enabled by default: Online and Email
Order Header Changes	
Order change request is rejected	Enabled by default: Online and Email
Profile	
Public profile is updated	Disabled by default.
An information update request is received	Enabled by default: Online and Email
Profile update reminder is received	Disabled by default. Future functionality.
Update information requests	Disabled by default. Future functionality.
Receipt Request	
Receipt created	Disabled by default.
Terms of Use	
New Terms of Use are received	Enabled by default: Online and Email
Users	
A new customer connection is created	Enabled by default: Online and Email
Service/Time Sheets	
A Service/Time Sheet is approved	Enabled by default: Online and Email
A Service/Time Sheet is rejected	Enabled by default: Online and Email

You also receive notifications displayed in a green bar following certain actions, for example:

> **Note:** If you change your notification preferences, remember to save them.

Administer the CSP

This chapter contains the following topics:

Admin Page

The admin page lets you manage merge requests, set up your legal entity, remit-to addresses, and more.

Manage Users

Manage user permissions and customer access.

Manage Merge Requests

Merge accounts and manage merge requests.

Set up Legal Entities

Set up your account by adding legal entities to be able to create e-invoices.

View and Manage Remit-to Information

Provide remit-to information to meet compliance regulations when invoicing.

Terms of Use

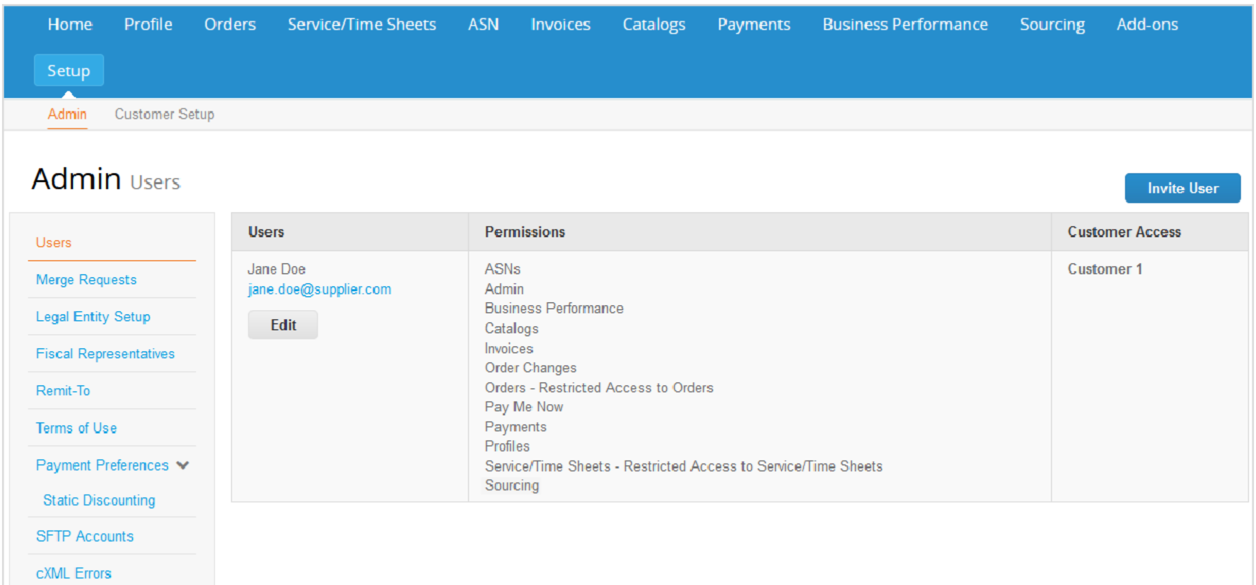
View and sign the terms of use to work with the CSP.

Create Custom Views

Change the view settings depending on how you want to see information on orders, invoices, catalogs, service/time sheets, ASNs, or payments for each customer.

Admin Page

On the **Admin** page you can manage users and merge requests, and the remit-to addresses for your customers; you can set up legal entities and fiscal representatives; you can view and sign the terms of use, etc.



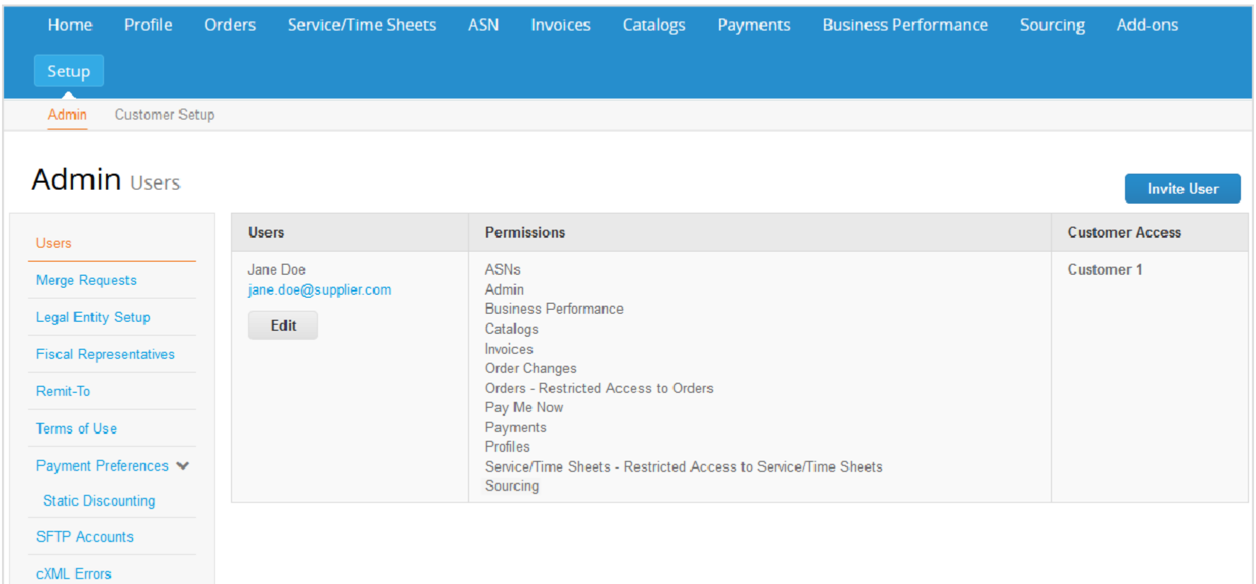
Menu Item	Description
Users	Invite new users, and manage what each user can do in the CSP and which customers your users can interact with.
Merge Requests	Manage any merge requests that you sent to or received from other supplier accounts.
Legal Entity Setup	Set up your account for electronic invoicing.
Fiscal Representatives	Add fiscal representatives that you need if you have operations in a country/region where you are not registered legally but you need to be represented for tax purposes.
Remit-To	Create and manage multiple remit-to addresses that are used to determine the payment location for invoices. This is important for creating legally compliant invoices.
Terms of Use	To use the Coupa Supplier Portal (CSP), you must accept the terms of use.
Payment Preferences / Static Discounting	Set preferred payment terms (early payment discounts terms) to be applied to any of your customers across all your invoices.
SFTP Accounts	Create and manage SFTP accounts to load invoices quickly.
cXML Errors	Get cXML error notifications and view the list of cXML errors to ensure timely correction and better handling of cXML transmission failures.
SFTP Errors	View the list of SFTP (CSV) file upload errors to ensure timely correction and better handling of SFTP transmission failures.

Manage Users

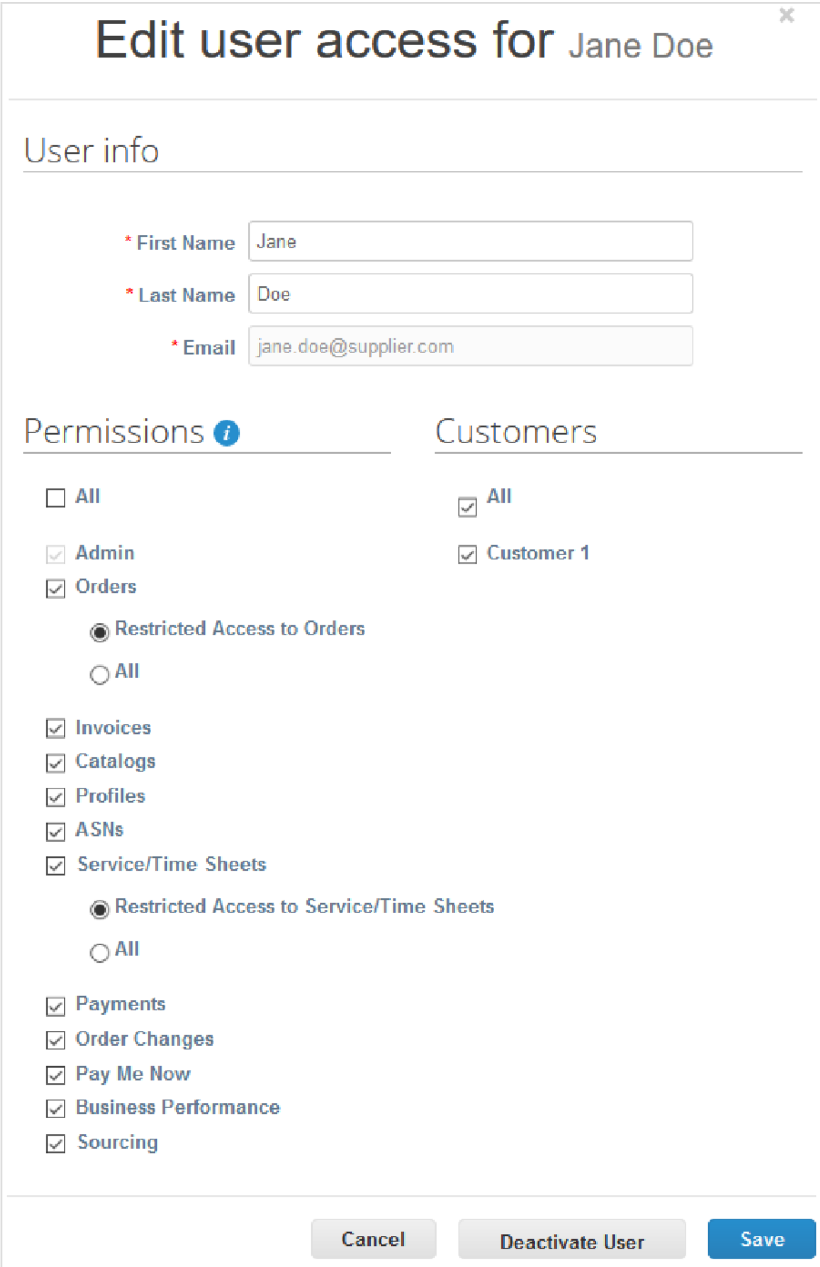
Permissions grant access for users to corresponding menu items. As an admin user, you have all the permissions by default.

You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.

Go to **Setup > Admin**. The **Admin Users** page appears.



Click on the **Edit** button to open the **Edit user access for [User Name]** window.



You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

You cannot change the user's email address. If a user wants to change the email address, send a new invitation to that user.

The **Invite User** and **Edit user access for [User Name]** windows are almost identical, but when you invite a user, you can specify an email address.

User permissions

Permissions	Description
All	Gives full access to all CSP functions, except for user administration.
Admin	Has full access to all CSP functions, including user administration. Non-admin users can still view the **Users** tab of the **Admin** page and invite users, but they cannot edit existing users. The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers. When selected, All is on by default.
Restricted Access to Orders	Allows accessing specific POs (assigned to specific users). The permission is off by default.
All	Allows viewing and managing all POs received from customers. When Orders is selected, it is on by default.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. **Note:** All users, regardless of permissions, can edit the public profile.
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs. When selected, All is on by default.
Restricted Access to Service/ Time Sheets	Allows accessing specific service/time sheets (assigned to specific users). The permission is off by default.
All	Allows creating and submitting any service/time sheets against POs. When Service/Time Sheets is selected, it is on by default.
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, for example, order, invoice, and delivery trends.
Sourcing	Allows viewing public sourcing events.

The Info ( ) icon tooltip shows the following information:

Permissions grant access for the user to the corresponding menu items.

For Orders and Service/Time Sheets, an additional level of granularity allows restricting a user's access to documents that are specifically assigned to them. If you want to apply this restriction, select the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions.

> **Note:** For auditing purposes, Coupa does not allow users to be deleted, so you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

Reactivate users

You can deactivate users when necessary. Also, users are deactivated automatically due to inactivity. For more information, see Inactivity.

You can see the relevant user status: inactive or deactivated. If you hover over a user's status, the following tooltip text is displayed informing you about the reason why a supplier user is not active:

- Deactivated: This user has been manually deactivated by an admin. It can be reactivated only by admin reactivation.
- Inactive: This user's account has been deactivated due to inactivity. It can be reactivated by validating the user's email during their next login attempt.

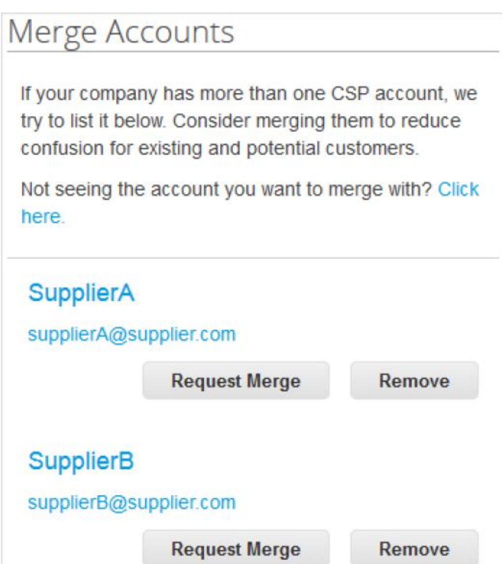
You can activate both inactive and deactivated users. If you activate them, they receive an email notification to verify their email.

If you deactivate users, you can always reactivate them later. If you reactivate a user, the customer access is reset for that user, so you'll have to assign customers to that user again.

Manage Merge Requests

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

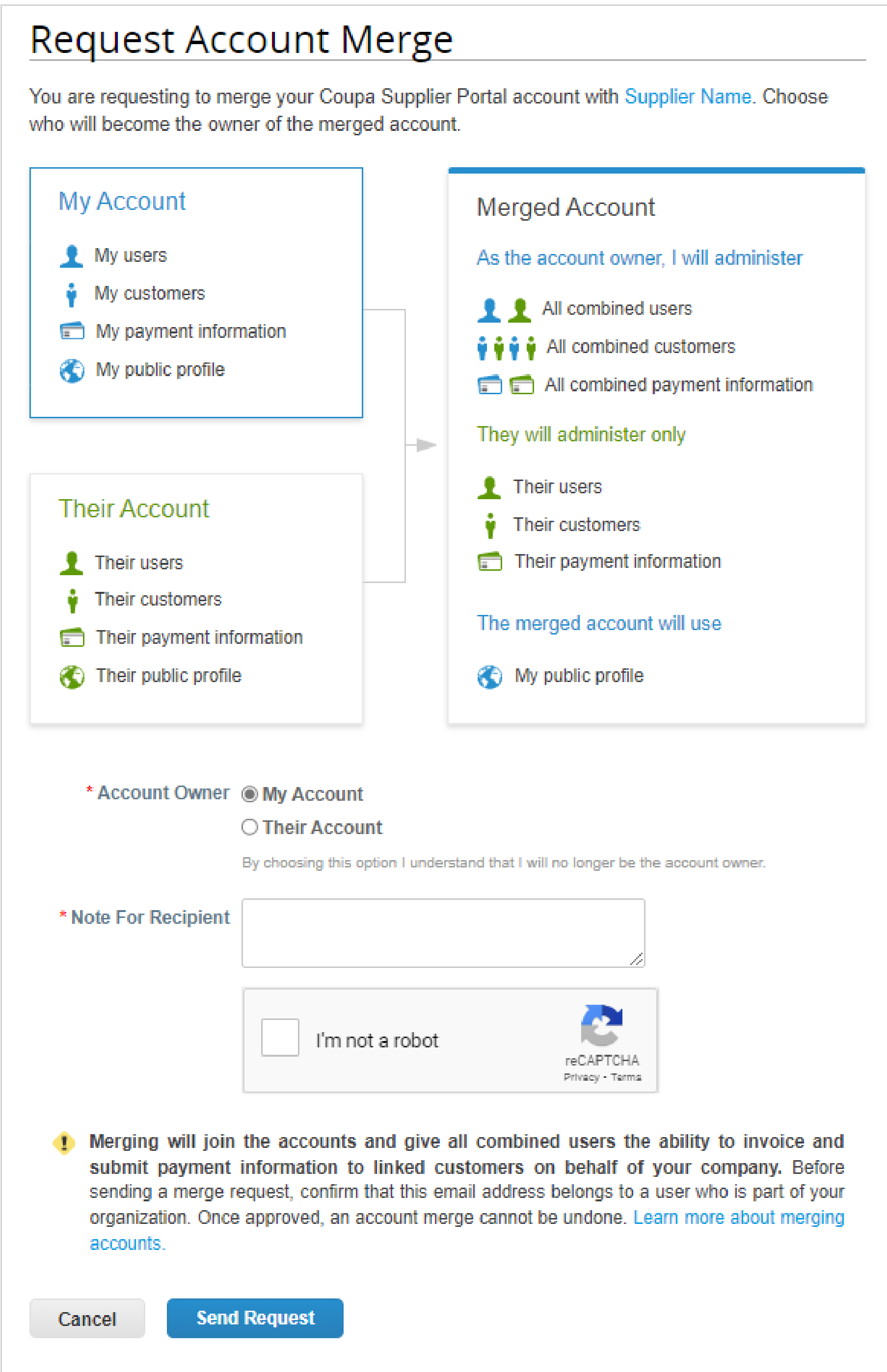
The suggestions to merge accounts are based on email domain. For example, all the users with the @example.com domain get suggestions to merge. Merge suggestions appear in the right-hand column on the **Home** page.



If you know that a suggestion is invalid, click on the **Remove button** and you will not see the request again.

If you want to merge an account, click on the **Request Merge** button and select an account to be the parent account and add a note.

When you select either your account or the other account to be the account owner, the CSP shows you a visual representation of who controls what data after the merge.

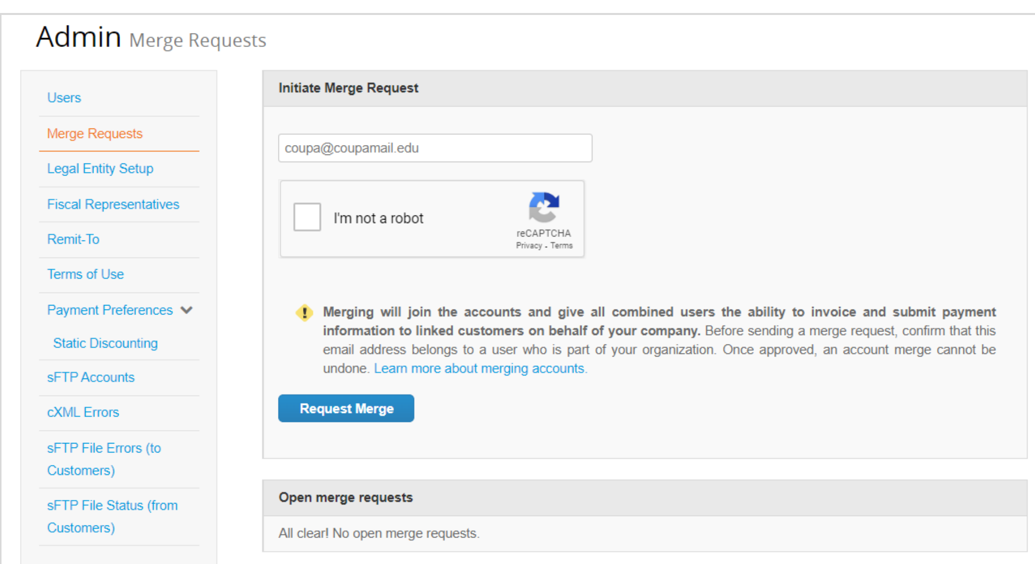


Selection	Description
*Account Owner / My Account	This causes the other account to be merged into your company account. The other user's company account is removed. You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information, see Manage Users.
*Account Owner / Their Account	Your company account is removed. The other user's company account becomes the only company account. You can no longer be the account administrator, but the administrator of the existing account can choose to make you an administrator of the merged account.
*Note	Add a note about the merge request, for example, the reason for the account merge.

Merged accounts use the following rules:

Element	Merge Behavior
Connected customers and customer profiles	Any connected customers are retained in the new account. The existing email address remains the contact email for the customer. If the customer is connected to both accounts, the parent account connection is retained and the merged account connection is removed.
Remit-to addresses	Remit-to information is transferred only for addresses that are available to all customers.

You can also search for a specific account to merge, for example, if the account is not listed or the list is too long to search for the specific account that you want. Clicking on the **Click here** link takes you to the **Admin Merge Requests** page. You can access this page also by clicking on the **Admin** tab on the main menu and on the **Merge Requests** link on the left.



Provide the email address of the account you want to merge, and click **Request Merge**. You can search up to five times.

You can see purchase orders and create invoices for both supplier records after selecting a customer from the **Select Customer** drop-down.

Set up Legal Entities

You can set up your account to create electronic invoices from the **Admin / Legal Entity Setup** page. You can add, manage, or deactivate legal entities, or manage remit-to accounts.

You can provide more remit-to accounts and add this information to your legal entities so that your customers can use different payment methods when working with you.

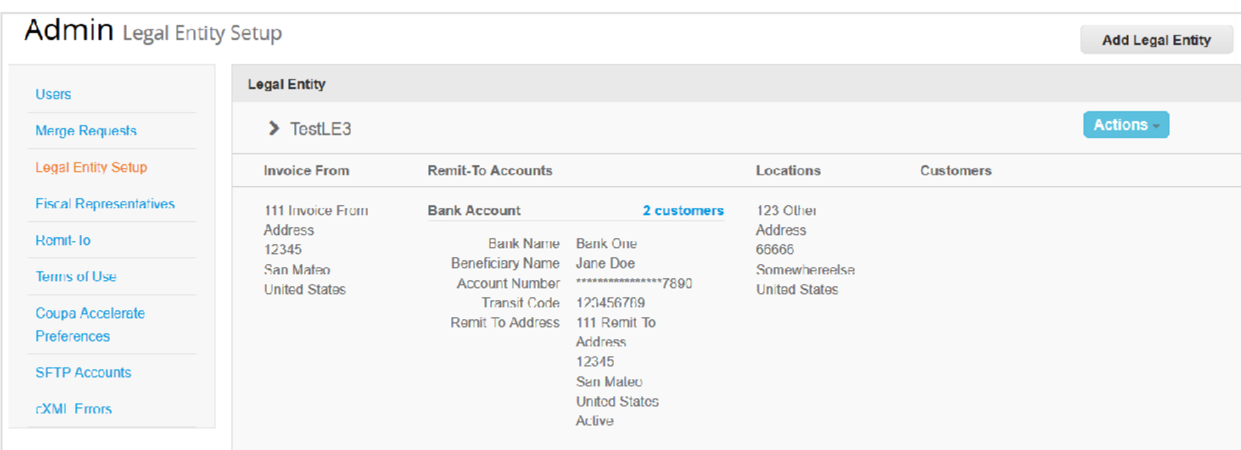
View and manage legal entities

On the left of the **Admin** page, click on the **Legal Entity Setup** link.

If you have three or more legal entities, they are collapsed. To view their details, click on the **Down** arrows.

Each legal entity has the following sections:

- **Invoice From**
- **Remit-To Accounts** – Can be of type: **Address**, **Bank Account**, or **Virtual Card**.
- **Locations**
- **Customers** – The name(s) and number of customers that you provided with the specific legal entity are also shown. Hovering your cursor over ***n* customers** displays the name(s) of the customer(s) associated with the legal entity.



Create a legal entity

To add a legal entity, click on the **Add Legal Entity** button in the top right corner.

> **Tip:** You can add legal entities also from the **Profile** edit page directly or when creating an invoice. See Create or Update Your Profiles and Create or Edit an Invoice for more information.

Enter the official name of your business that is registered with the local government (legal entity name) and select the country/region where it is located. Click **Continue**, and in the appearing **Tell your customers about your organization** window, fill in at least the mandatory fields, that is, the fields marked with a red asterisk (*).

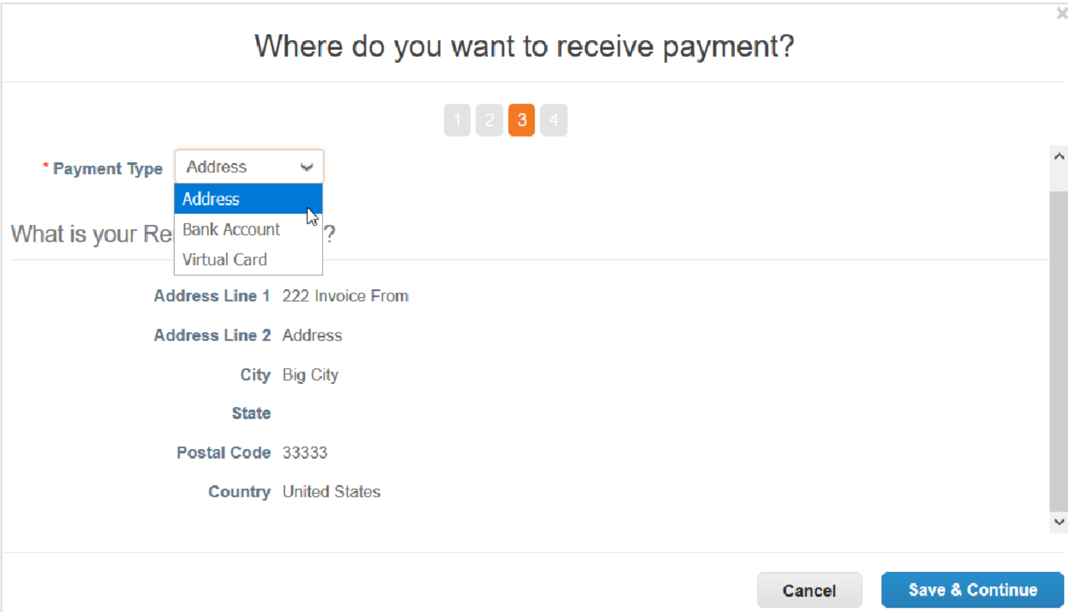
Field/Checkbox	Description
Which customers do you want to see this?	Select all or the specific customer(s) that you want to see your legal entity information. Customers that use Coupa for payments are marked with the Coupa Pay ( ) icon. If you select a Coupa Pay customer, the payment information that you enter is validated. The icon and tooltip are different depending on whether your banking information is: • Valid: • Invalid: • Pending validation:
What address do you invoice from?	Required for invoicing. Is critical for compliance in some countries. Registered address of your legal entity. This is the same location where you receive government documents. It might differ from the physical address. Sometimes this is called your address of record or registered company address. Address line 1, city, and postal code are mandatory.
Country/Region	The country/region you selected when adding the legal entity.
Use this address for Remit-To*	Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
Use this for Ship From address*	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or you have more than one location. **Tip:** Include this information on the invoice when the addresses are different. For many countries, including this information is mandatory.

Field/Checkbox	Description
What is your Tax ID?	Enter your tax/VAT ID. **Note:** If you are exempt from tax registration in some regions/countries, select the I don't have TAX ID Number checkbox and enter your local tax ID or write N/A in the appearing Local Tax ID field.
Country/Region	Select your tax country/region from the drop-down list.
Tax/VAT ID	Enter the tax/VAT ID, including the prefix to the number, for example, GB1234567890. **Tip:** You can add more tax IDs by clicking on the **Add additional Tax ID** link.
Fiscal Rep	If you selected a different country than that of your legal entity in the Country/Region selector in this section, you need to designate a fiscal representative who is authorized to do business in that country/region on your behalf. For more information, see Add Fiscal Representatives.
I don't have a TAX ID Number	Select the checkbox to add your local tax ID or write N/A in the **Local Tax ID** field.
Miscellaneous	
Invoice from Code	Tie your CSP invoice-from address (that is, registered address) with the corresponding address in your ERP.
Preferred Language	Select your language from the drop-down list.

*If your remit-to and ship-from addresses are different from your invoice-from address, you need to provide also that information.

After filling in the fields, click **Save and Continue**. In the appearing **Where do you want to receive payment?** window, select from the following payment types: **Address**, **Bank Account**, and **Virtual Card**.

> **Note:** You can see these options and provide your information, but Lear does not use Coupa Bank Account or Virtual Card information and the details you mention here is only for-information. If you want to update your bank account details in the Lear payable system, please contact your Lear counterpart (buyer, AP team).

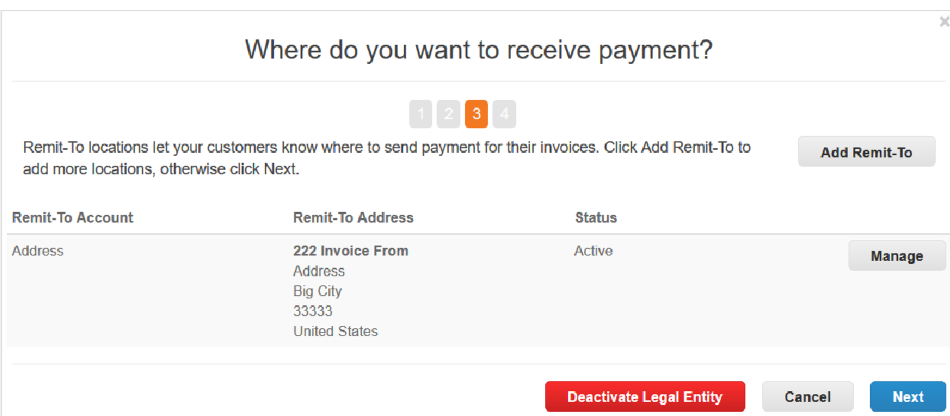


If you select **Address** (default option), you can continue to the next step as you already provided the address(es) on the previous page.

If you select **Bank Account**, you can provide your banking information to be shown on your invoices.

> **Note:** The banking information provided during the Coupa Registration is optional, this information is NOT automatically transferred to Lear's Corporate Payment System. If you need to update your Bank Account detail please reach out to your Lear Purchasing Buyer.

The **Where do you want to receive payment** window shows both the **Remit-To Account** and the **Remit-To Address**.

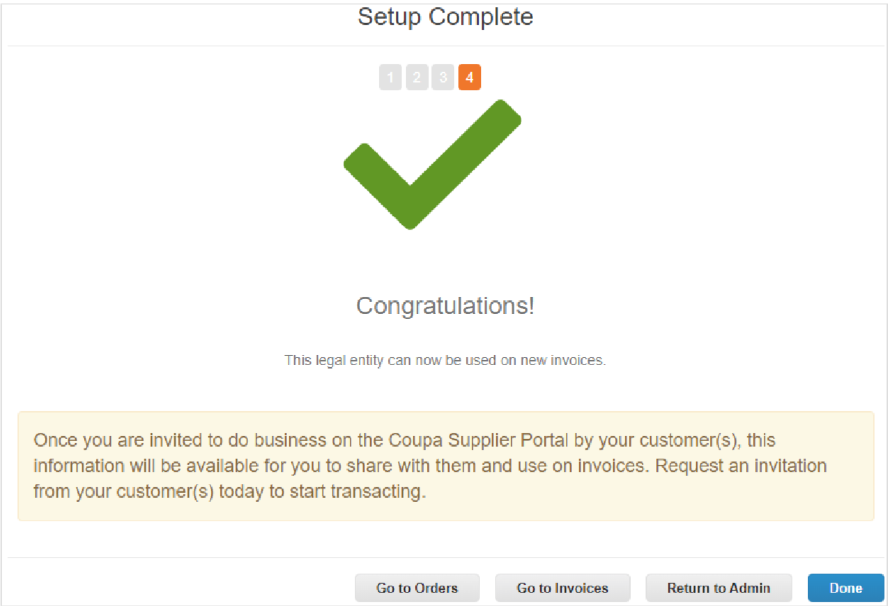


To manage your legal entities, click on the **Actions** button on the **Legal Entity Setup** page, select **Manage Legal Entity**, and click **Continue**. In the appearing **Where do you want to receive payment** window, you can add a new remit-to address.

You can deactivate a legal entity by selecting **Deactivate Legal Entity** from the **Actions** button or on any of the appearing windows.

Click **Next** to add the address where you want to ship goods from, if it is different from the remit-to address. Fill in at least the mandatory fields and click **Continue**.

After completing the legal entity setup by clicking **Done**, that is, after adding a legal entity, you can use it on new invoices. From the **Setup Complete** page you can choose to **Go to Orders**, **Go to Invoices**, or **Return to Admin** page.



To manage your remit-to accounts, go to **Setup > Admin > Remit-To**. For more information, see View and Manage Remit-to Information.

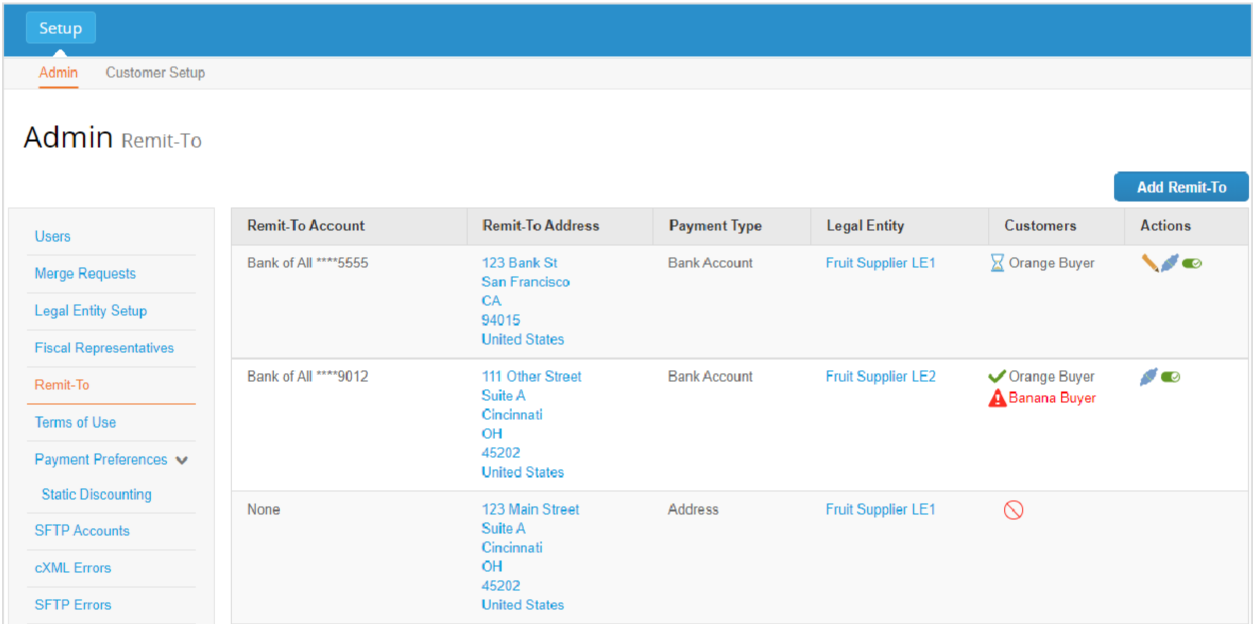
View and Manage Remit-to Information

Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information. If you want to do business with a customer who enabled compliant invoicing, you need to provide the necessary information.

You are required to add a remit-to address when setting up (adding a legal entity for) electronic invoicing or creating invoices. For more information, see Set up Legal Entities and Create or Edit an Invoice.

View remit-to accounts

Go to **Setup > Admin > Remit-To** to view the list of remit-to accounts and their details: associated remit-to address and legal entity, payment type, the (up to five) customer(s) they are assigned to, and possible actions (update, share, and disable).



Icons in the **Customers** column indicate the status of the remit-to accounts.

Column	Description
Customers	The customers you've shared this remit-to address with (up to five are displayed). The icons indicate the remit-to status with the customer they appear next to: • **Active** ( ): The remit-to address is active and approved by your Coupa customer in their instance. • **Active and Pending Validation** ( ): The remit-to address is active but is pending confirmation in your Coupa customer's instance. • **Inactive** ( ): The remit-to address is inactive. • **Error** ( ): Something happened and you need to contact Coupa support.

The most recently added remit-to account is at the top of the list.

Manage remit-to accounts

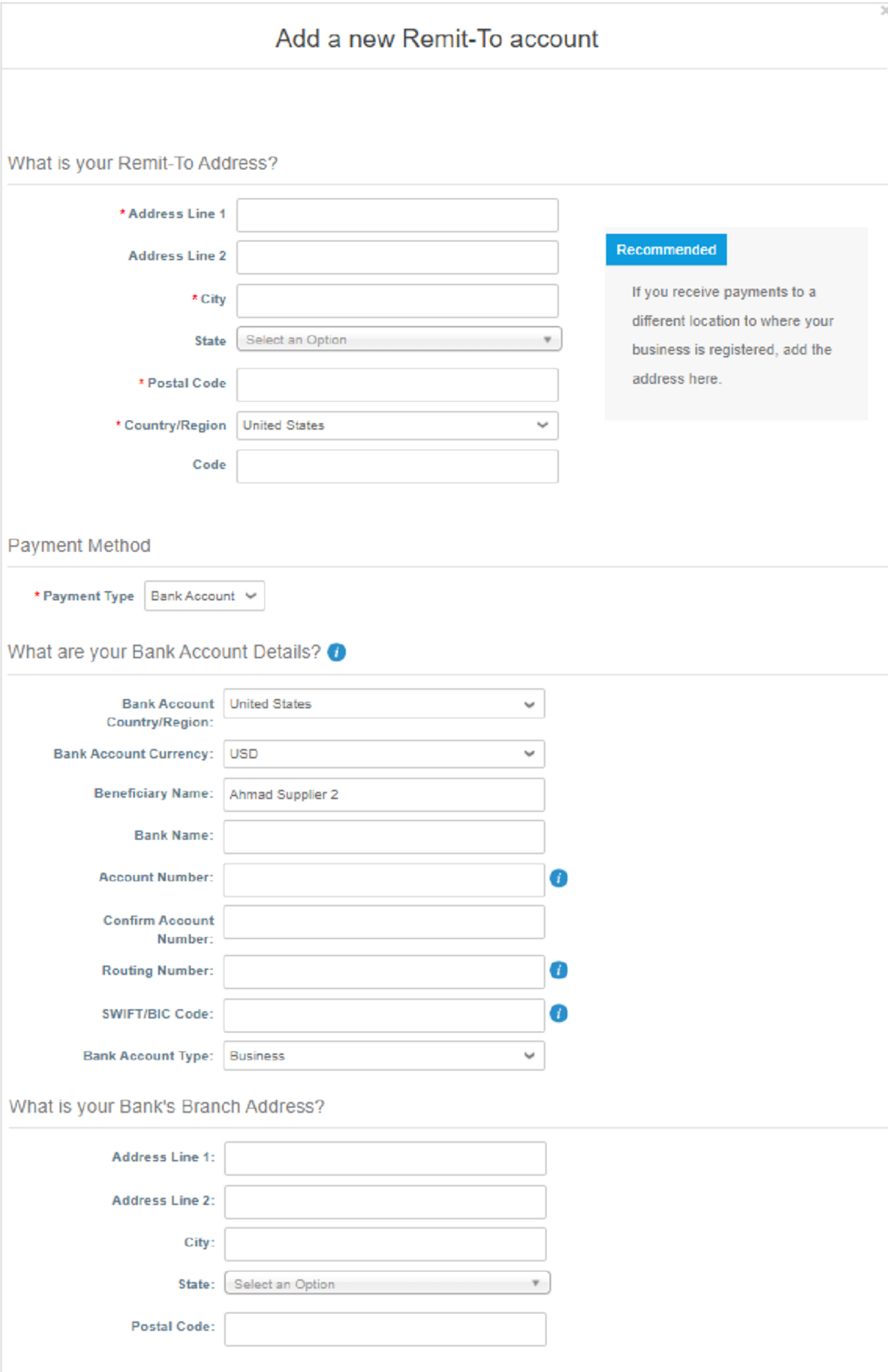
You can add new, or update, share, or deactivate existing remit-to accounts by going to **Setup > Admin > Remit-To**.

Add

To create a new remit-to, click the **Add Remit-To** button, select the legal entity to be associated with it, and click **Next.**

You can add remit-to accounts also from the **Setup > Admin > Legal Entity Setup** page. Click on the **Actions** button, select **Manage Remit-To Accounts**, and in the appearing **Add a new Remit-To account** window, click **Add Remit-To**.

In the appearing **Add a new Remit-To account** window, fill in at least the mandatory address fields and select a payment type (marked with a red asterisk).



For more information about the fields, see Set up Legal Entities.

If the selected payment type is **Bank Account**, you can see fields for bank account details that are relevant to the selected bank account country/region. Bank account fields are validated.

> **Tip:** Tooltips marked with the Info ( ) icon provide information about the valid format for the fields.

If you enter an invalid format in a field, the field is highlighted in red and information about the expected format is displayed in red text under the field.

Click **Save and Continue**. The new remit-to account is added to the list.

> **Note:** When you try to save a remit-to account with invalid fields, you can see an error message. You can decide to ignore the errors and save the account anyway; however, it is not recommended as it may result in delayed processing for the affected customer(s).
>
> You can save an invalid remit-to account only once; later you are required to correct the invalid fields.

Invalid remit-to accounts are marked with red in the **Customers** column and a tooltip provides details about the error.

Deactivate, Update, or Share

To deactivate a remit-to account, click **Manage** in the **Add a new Remit-To account** window, and then click **Deactivate Remit-To**. You can deactivate remit-to accounts also from the **Admin / Remit-To** page by clicking the **Disable** ( ) icon in the **Actions** column.

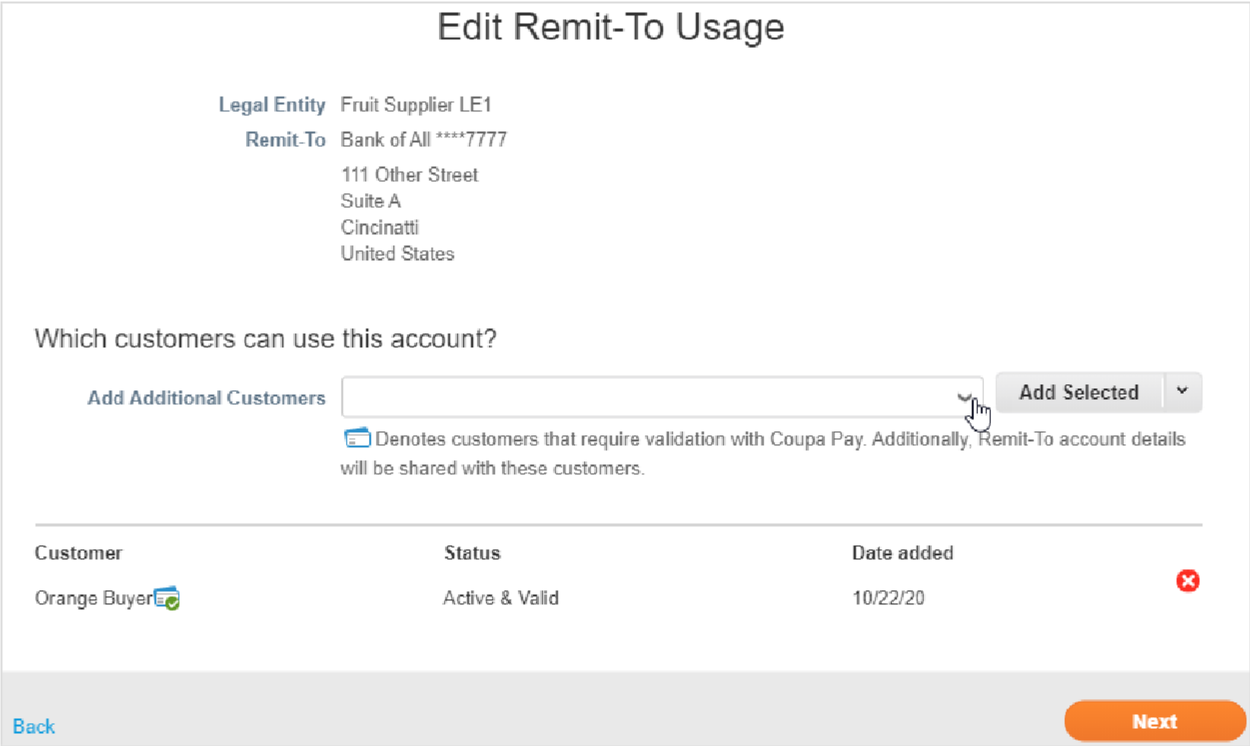
Deactivating a remit-to account also deactivates the corresponding supplier payment account on your Coupa Pay customer side. If the deactivation is unsuccessful, you are informed about it in a message bar.

> **Note:** Deactivation cannot be undone, so you are asked to confirm the action.

Click the **Update** ( ) icon to update remit-to information, for example, to correct invalid fields.

> **Note:** After you submit the updated remit-to information, a new remit-to account is created and the original account is deactivated.

You can share your remit-to accounts with some or all customers. Click the **Share** ( ) icon and in the appearing **Edit Remit-To Usage** window, select the customer(s) from the **Add Additional Customers** drop-down list, and click **Add Selected**. To share it with all your customers, select **Add All** from the **Add Selected** drop-down.



Note: If you merge accounts, your remit-to addresses are not merged unless you make them available for all customers. Once the merge is complete, you can assign the remit-to address to the specific customer(s) again.

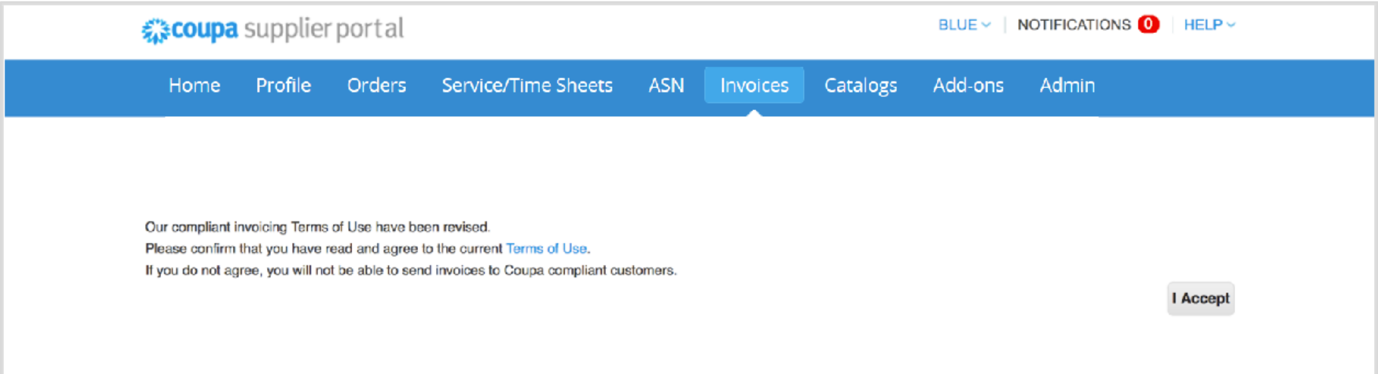
Terms of Use

To use the CSP and to allow Coupa to create invoices on your behalf when you use compliant e-invoicing, you must sign the Coupa Open Business Network legal Terms of Use. Otherwise, you cannot create and submit invoices through Coupa and the CSP.

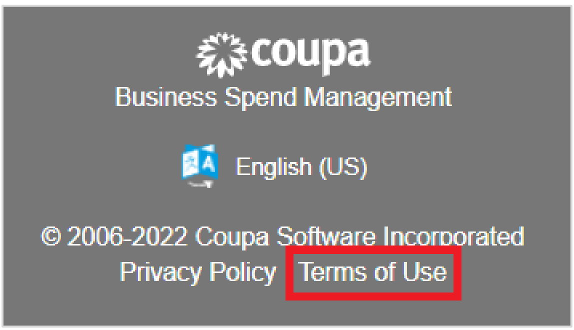
The legal terms of use lists the terms and conditions for using e-invoicing through Coupa and the CSP. You as a supplier, especially if you are responsible for managing legal tax invoices, are required to have read, assessed, and agreed to these terms of use and to be aware of your responsibilities towards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

To issue a legal compliant invoice, you need to set up a remit-to address for a compliance country. When you use a compliance country remit-to address for the first time, Coupa validates if you have signed the latest terms of use.

If the Terms of Use has not been signed yet or there is an updated version of the Terms of Use, you are prompted to review and sign it. You can use the embedded link to review and sign the legal terms of use.



Or review the latest version from the bottom menu of the CSP

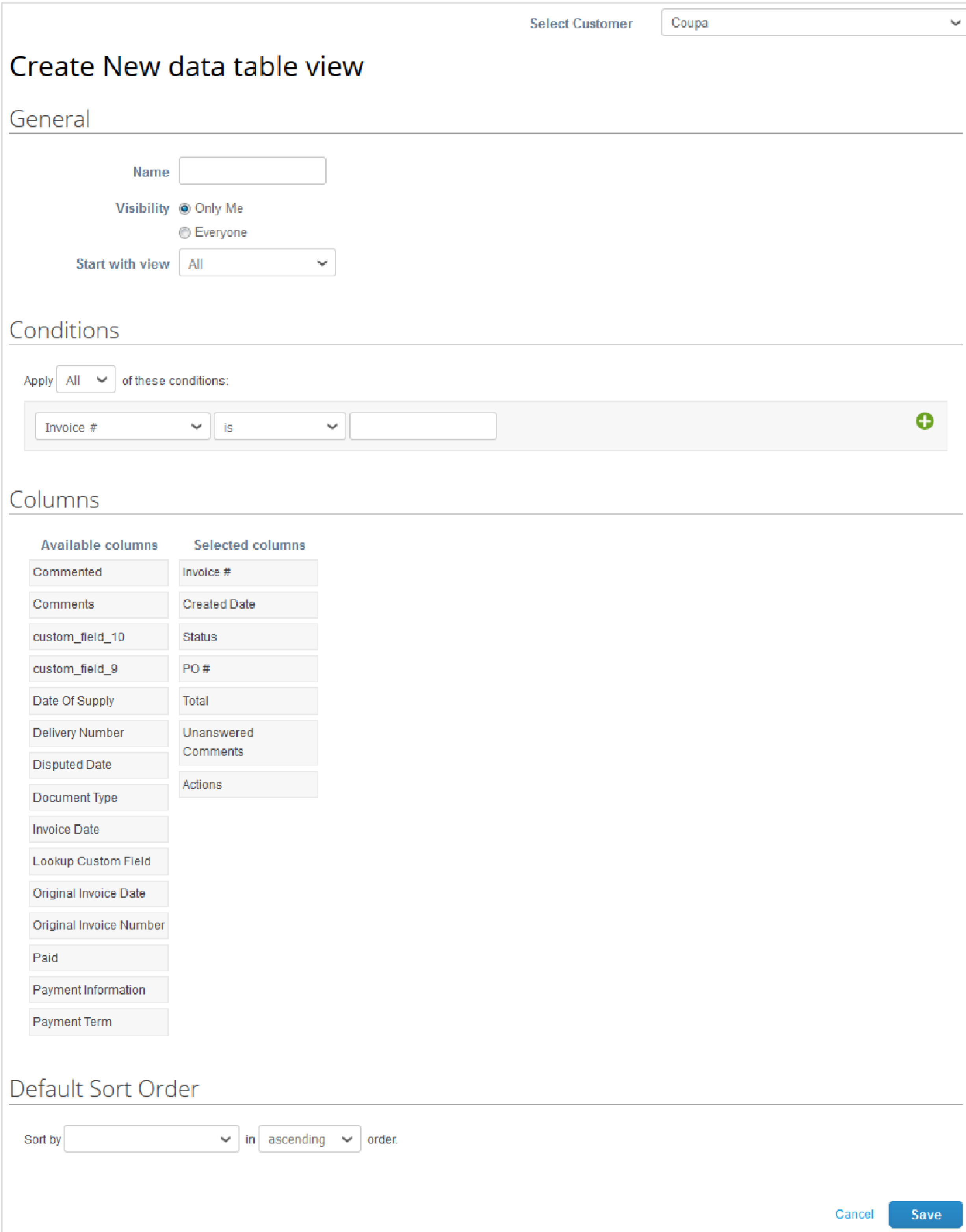


Create Custom Views

You can create custom views for orders, order lines, order changes, order line changes, service/time sheets, service/time sheet lines, advance ship notices (ASN), invoices, catalogs, invoice payments, and PO payments.

With a custom view you can create a set of advanced search filters.

1. On the main menu, click on the tab for the function for which you want to create a custom view.
2. At the top of the table whose view you want to change, click **Create View** in the **View** drop-down list.
3. On the **Create New data table view** page, select the customer for whom you want to change the view settings, and then specify the settings you want to use for your custom view, including filtering conditions, columns to include, and sorting criteria.



If you want to build this view based on another view and modify those settings, use the **Start with view** option under the **General** settings.

You can use the following settings when creating or editing a custom view for a CSP table.

Group	Setting	Description
General	Name	Name of the custom view, visible from the **View** drop-down list at the top of the table.
	Visibility	Defines whether this view can be visible to only you or all the other users that can see the main table.
	Start with view	Use this option to load the settings from another view, and then modify those settings to fit your needs for this view.
Conditions	Apply	All - Displays results only for objects that meet all of the conditions you add in this list. Any - Displays results for objects that meet at least one of the conditions you add in this list.
	Conditions	Create conditions based on the data available in the CSP.
Columns	Available columns	This list depends on the table you work with in the CSP. You can select any of these columns to add to your custom view.
	Selected columns	These are all the columns displayed in this custom view. They appear from left to right, in the same order that you set them up here.
Default Sort Order	Choose the column by which you want results to be sorted and define whether to sort them in ascending or descending order.	

4. **Save** your settings.

To delete a custom view, open the view for editing by clicking on the **Edit View** ( ) icon and click on the **Delete** ( ) button at the bottom of the page.

Work with CSP

This chapter contains the following topics:

View Business Performance Data

You can view a summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.

View Customer Announcements

View announcements from your customers.

View and Manage POs

View purchase orders received from your customers.

View PO Lines

View individual PO lines by going to Orders > Order Lines.

Create or Edit an Invoice

Work with existing invoices or create new invoices without a backing PO.

View and Manage Invoices

View and edit invoices that you sent to your customers.

View Invoice Lines

View individual invoice lines by going to Invoices > Invoice Lines.

Payment Information on the Invoice

View Payment information by going to Invoices > View Payment Information or the Payments layout on each invoice.

Disputed Invoices

View and resolve disputed invoices by going to Invoices > View Disputed.

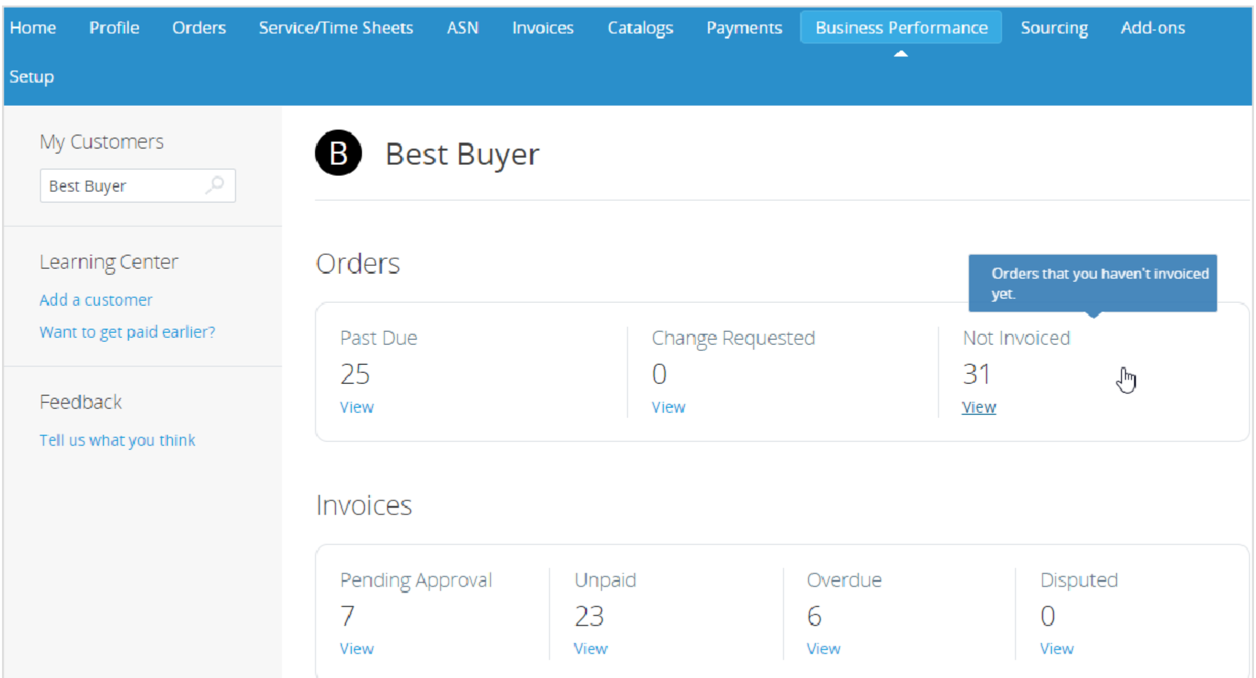
View Business Performance Data

Click on the **Business Performance** tab on the main menu to view a summary of orders and invoices that may need attention, and year-to-date order, invoice, and delivery time trends.

> **Note:** You can see this page only if you have the **Business Performance** permission. For more information, see Manage Users.

View the order/invoice summary dashboards

In the top left corner, select from the list or search for the customer for which you want to see performance data.



The selected customer name appears at the top of the page and below it, you can see a summary (with numbers and statuses) of your orders and invoices that need attention as follows:

Document Type	Status	Description
Orders		
	Past Due	For an issued order, if the "need by date" has passed and the order is not complete.
	Not Acknowledged	The number of orders that you have not acknowledged. Shown only if you acknowledged at least one order in the past.
	Change Requested	Orders for which you or your customer have requested a change.
	Not Invoiced	Orders that you have not invoiced yet.
Invoices		
	Pending Approval	Invoices that have not been approved by your customer yet.
	Unpaid	Coupa Pay customer invoices that have not been paid yet.
	Overdue	Invoices that have not been paid yet and are past the due date.
	Disputed	Invoices that you or your customer have marked as disputed to indicate an invoice discrepancy.

Tip: To see the description for a status, hover your cursor over the relevant number.

Clicking on the **View** links takes you to the **Orders** or **Invoices** page, respectively, showing only the list of orders/ invoices relevant to the status selected to view.

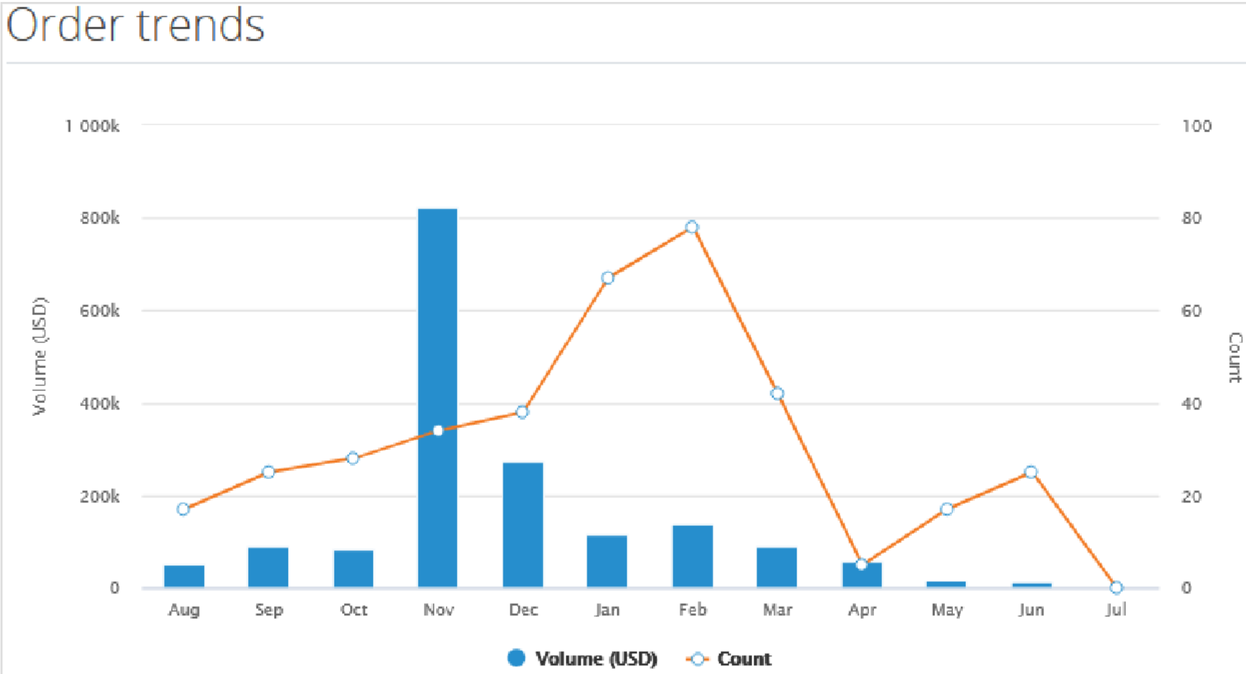
Note: The **View** links are visible only if you have permission to view orders/invoices.

View order/invoice/delivery time trends

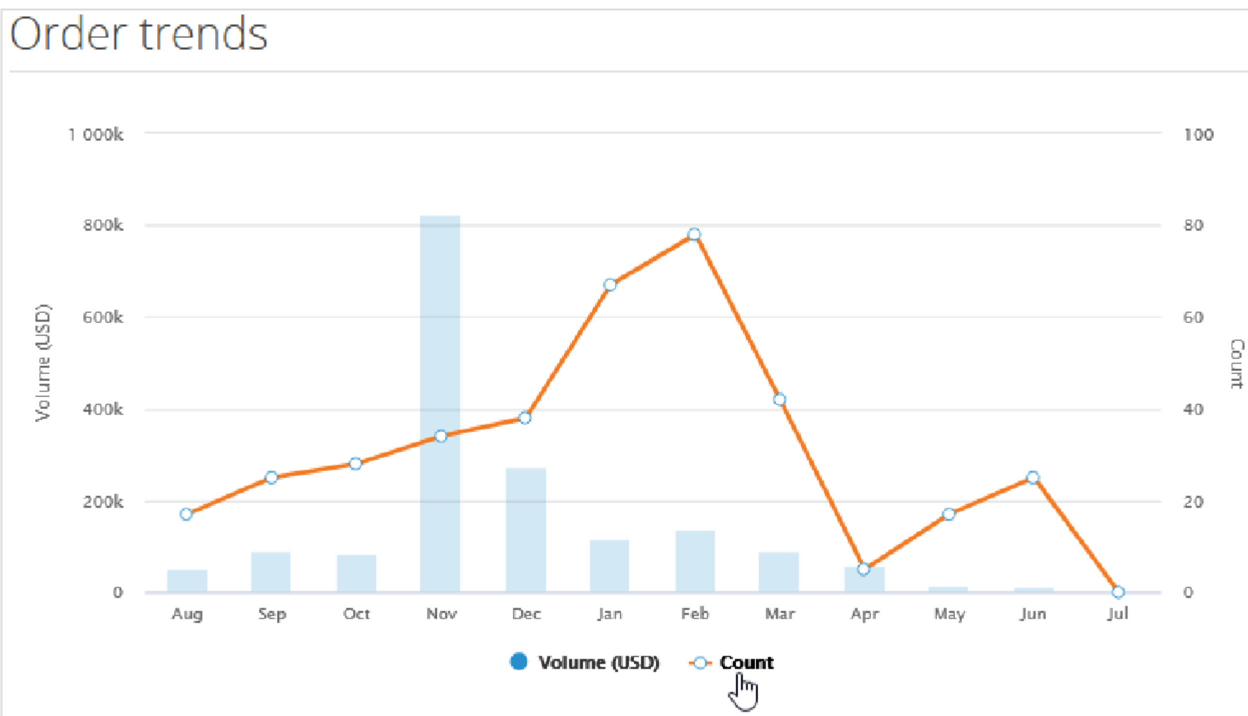
Below the summary dashboards, you can find graphs for order, invoice, and delivery time trends for the past 12 months.

Note: The data provided is directional and for informational purposes only, and may be delayed up to one-two weeks.

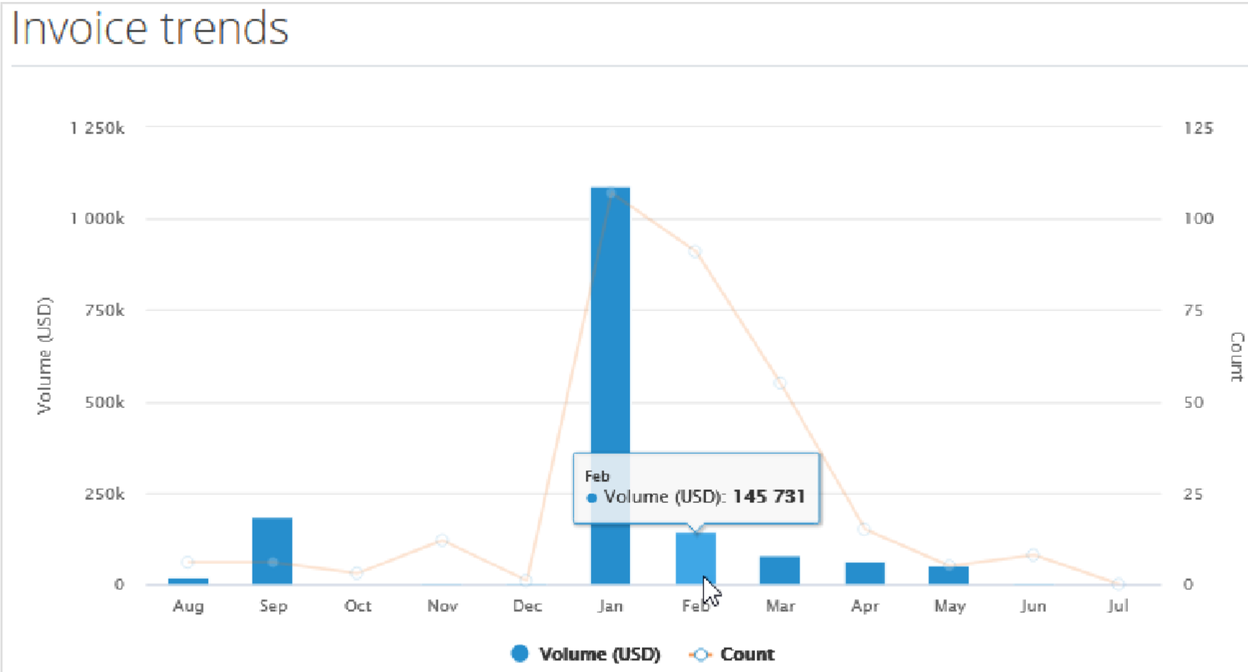
The order/invoice graphs show the volume/amount and count/number of your orders/invoices by month.



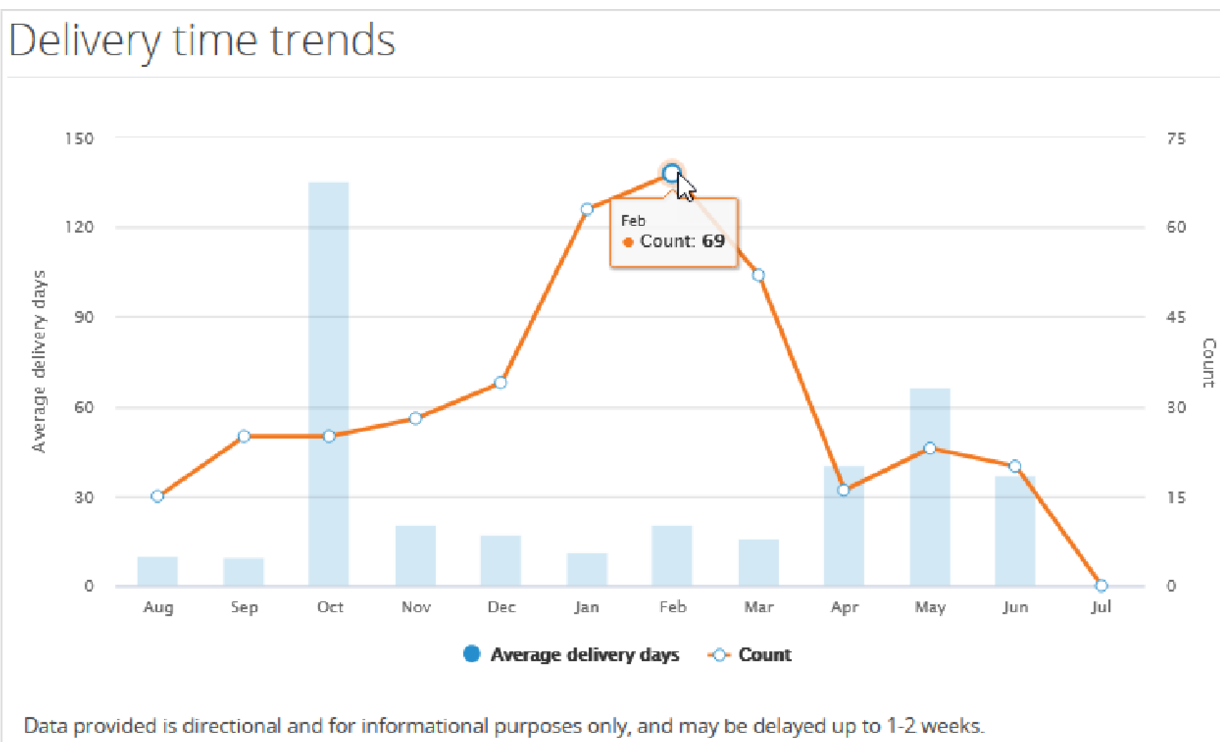
Hover your cursor over **Volume** or **Count** in the legend to highlight the relevant data.



Hovering your cursor over the volume bar or count line shows you the volume or count of orders/invoices by month.



Delivery time trends show the average delivery days (time in days between the order date and the receipt date) and the number of orders delivered by month. Hover your cursor over the graph to see details.



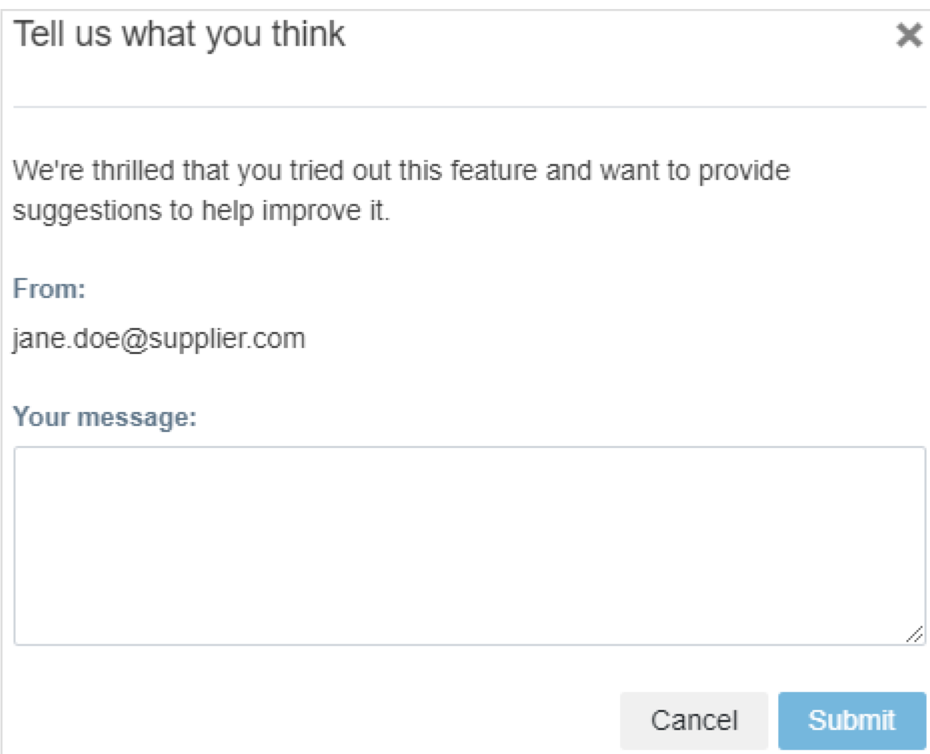
Cases when data or customer is missing

- If no data is available, for example, there are no orders or invoices with the selected customer, the **We could not find any relevant (order/invoice) data** message is displayed.
- If you have no transactions (orders or invoices) with a customer, the **Before we can show you any cool stuff we need you to get some orders and invoices in here!** message is displayed.
- If you are not connected to any customers, the following message is displayed: **You need to be connected to your customer before we can show you any cool stuff. Ask your customer to send you an email invitation from Coupa. This document explains the steps they need to take. It's super easy.** The This document link takes you to the page where you can learn how to add and connect with a customer in the CSP.

Learn more and provide feedback

In the top right corner below the list of customers, you can find the **Learning Center** and **Feedback** sections. Click on the following links:

- Add a customer to learn how to add and connect with a customer in the CSP.
- Want to get paid earlier? to learn about payment options.
- **Tell us what you think** to provide feedback and suggestions to Coupa.

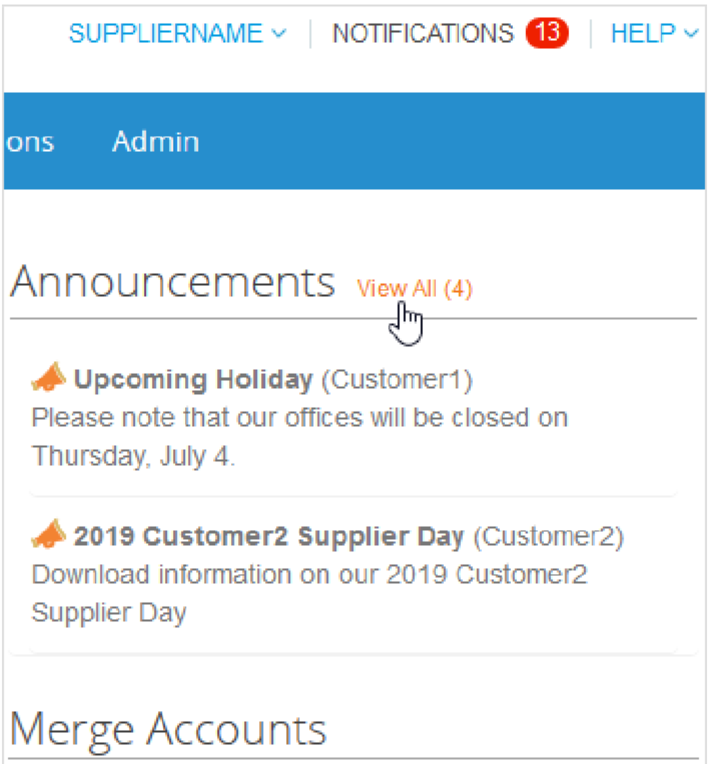


The **Submit** button is enabled only when you enter text in the **Your message** field. After submitting your message, a green notification bar informs you about **Feedback sent**.

View Customer Announcements

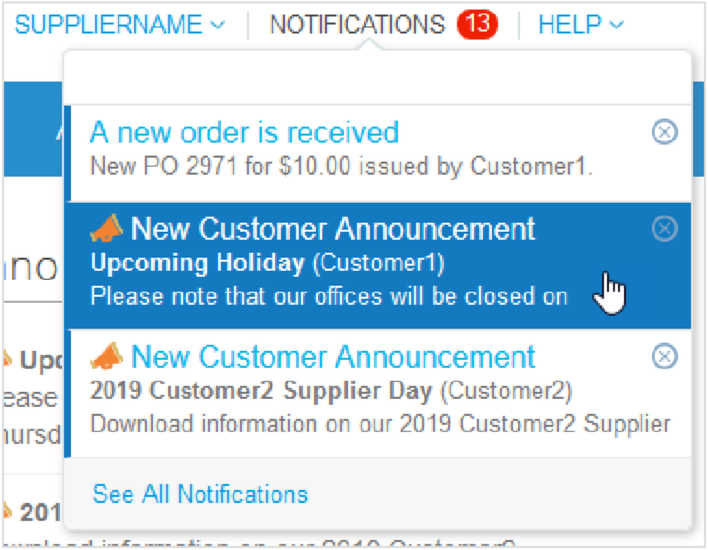
Lear can create announcements to be shown to you on the **Home** page and/or other Coupa Supplier Portal (CSP) pages to help you understand unique onboarding requirements and communicate with you about initiatives, promotions, and changes required for your collaboration through the CSP. With this one-way communication, Lear can, for example, provide you with instructions on how to join or what to do after joining the CSP, share with you information necessary for transactions, inform you about upcoming orders, remind you of updating supplier information, and more.

You can see your customers' announcements at the top of the right section of the **Home** page.



> **Note:** By default, only previews of the two most recent announcements are displayed. You can see the full text of an announcement in a popup after clicking on it. To view all the announcements with their full message, click on the **View All (n)** link that takes you to the **My Notifications** page filtered by **Announcements**. For more information, see View and Manage Notifications.

The announcements are also shown where all the other notifications appear, that is, in the **Notifications** and **My Notifications** sections.

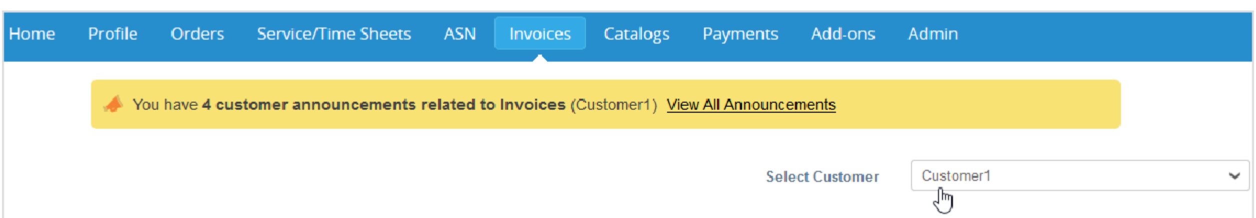


Online notifications are on by default.

> **Note:** You cannot disable online notifications for announcements. Customers' announcements are always shown on the **Home** and **My Notifications** pages for the set period of time.

Depending on your notification preference settings, you can also get online and/or SMS notifications.

If your customer selected other pages to inform you about their announcements, you can see a yellow banner at the top of those pages notifying you about the number of announcements for those specific areas from the selected customers and the link from which to access those announcements.



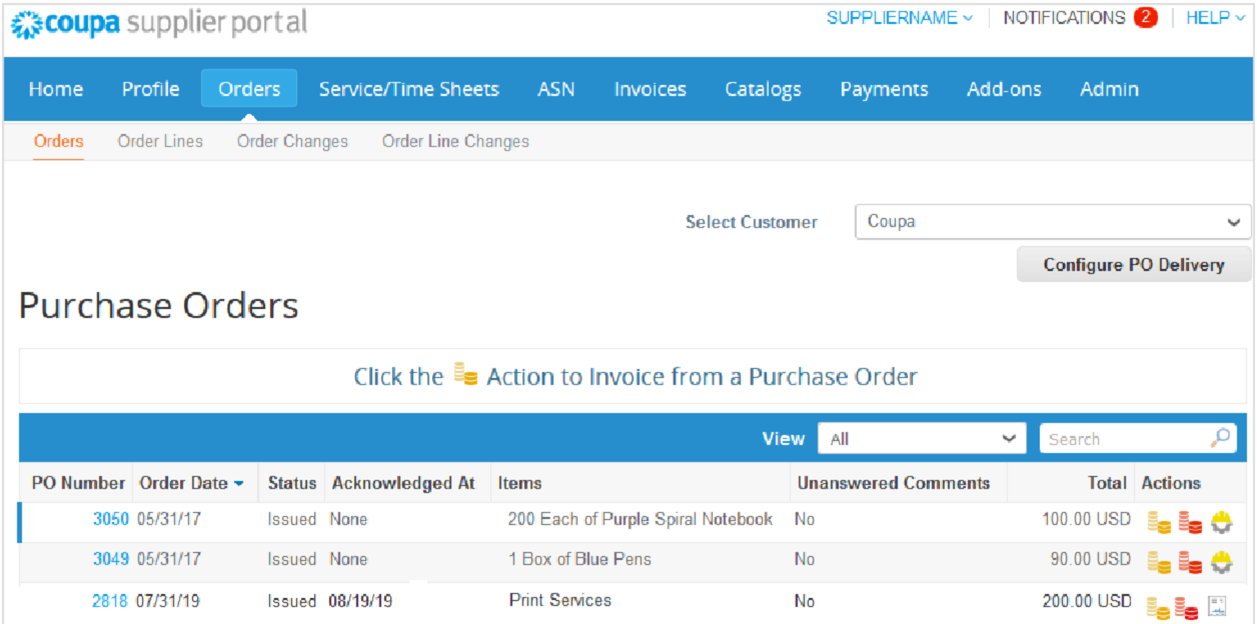
The banner is not visible on the **Home**, customer-specific **Profile** view, **Admin**, and **Add-ons** pages, and on the **Public Profile** page accessed from the link under the **Public Profile** section on the **Home** page.

Clicking **View All Announcements** directs you to the **My Notifications** page filtered by **Announcements**. For more information, see View and Manage Notifications.

Your customers can delete or edit their announcements. Deleted and expired announcements disappear from the CSP. Also, if you delete a notification for an announcement, the announcement disappears from the **Home** page, too.

View and Manage POs

Click on the **Orders** tab on the main menu. The **Orders** page with the **Purchase Orders** table appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.

> **Note:** Each individual Lear plant is a standalone customer for your account, and when you visit the page again, it shows you the invoices for the customer you selected last time.

The **Purchase Orders** table shows the following information for all the POs you received from the selected customer.

Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO.
Order Date	Date when the PO was created.
Status	Current status of the PO. For more information, see the PO status list below.
Acknowledged At	Date when you acknowledged the receipt of the PO, or "None" if not acknowledged. You can choose to let your customer know that you received their PO by selecting the **Acknowledged At** checkbox on the PO. When you select the checkbox, the current date appears in the **Acknowledged At** column. This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date appears.
Items	List of items on the PO.
Unanswered Comments	Your comments on the PO for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the

Column	Description
	customer when you open the PO. **Note:** If you need urgent communication, contact your customer directly.
Total	Total amount of the PO.
Assigned To	Contains the email address of the users that have been assigned the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions. **Note:** This column is visible only if the **Restricted Access to Orders** and **Restricted Access to Service/Time Sheets** permissions are assigned to at least one user.
Actions	Click on the icons for the following actions: • - Create (flip the PO into) an invoice. Depending on your customer's settings, the tooltip text can be about creating an invoice from the PO or accepting the PO and creating an invoice. • - Create a credit note. • - Create a service/time sheet. • - Create (flip the PO into) an advance ship notice (ASN).

You can also print POs. Click on the **PO Number** link to open the PO and at the end of the PO, click on the **Print View** button. Depending on your browser, click on the three vertical dots or the three horizontal lines icon in the top right corner of the appearing window to open the browser menu, and select **Print** from the list of options.

Tip: You cannot reject a PO, but if you do not accept it, you can add a comment on it for your customer.

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. For more information, see Create Custom Views.

POs can have the following statuses:

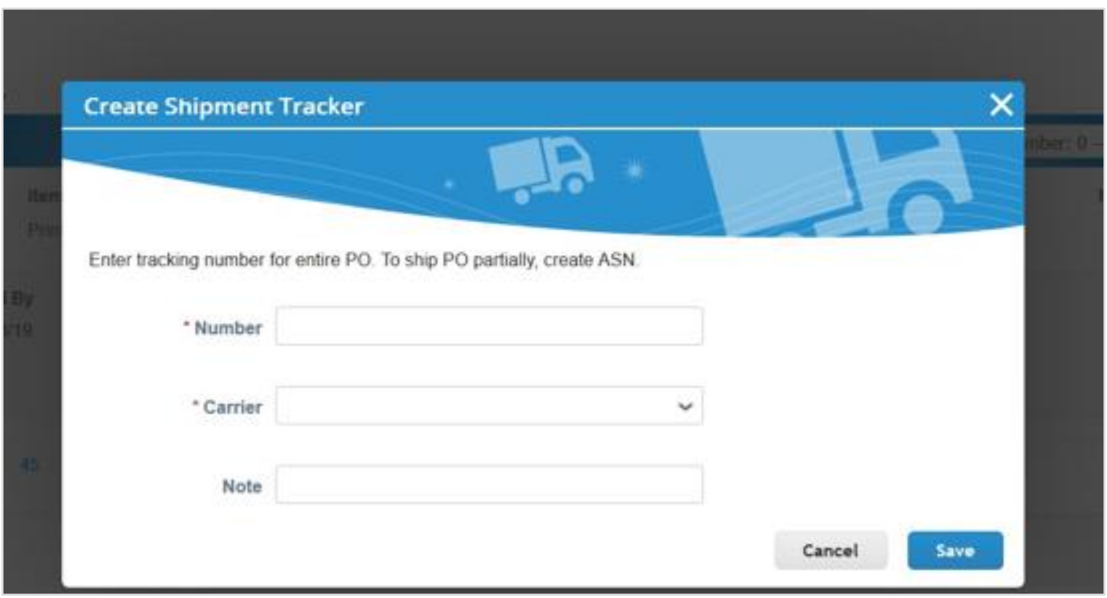
Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Cancelled	The PO is cancelled and does not need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.

Status	Description
Error	Something is wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

Above the table you can have instructions from the customer specifying, for example, policies or best practices.

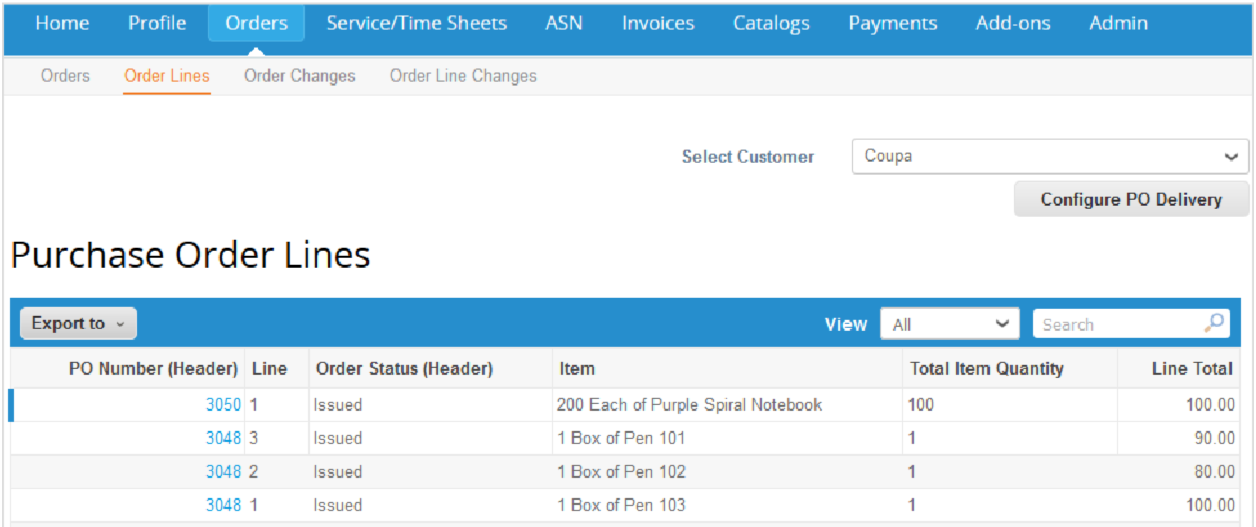
Add shipment tracking information

In the **Shipment Tracking** section in the PO, click on the **Add** () icon. In the appearing **Create Shipment Tracker** popup window, enter the tracking number for the entire PO, select a carrier (at the moment, only limited couriers' tracking numbers are possible - FedEx, USPS, UPS etc.) from the drop-down window, and add a note (optional).



View PO Lines

Click on the **Order Lines** tab to see information on the PO lines for each PO.



From the **Select Customer** drop-down list in the top right corner, select the customer whose PO lines you want to see.

The **Purchase Order Lines** table shows the following information for all the PO lines:

Column	Description
PO Number (Header)	PO number generated by Coupa. Click on it to see the PO line.
Line	PO line number.
Order Status (Header)	Current status of the PO. For more information, see View and Manage POs.
Item	List of items on each PO line.
Total Item Quantity	Total quantity of the PO line.
Line Total	Total amount of the PO line.

For your custom view, you can select to see the following additional information: ASN lines, carrier, confirmed quantity, delivery date, invoiced, line level text, need by date, received, ship method, ship note, shipment date, shipped quantity, and tracking number.

You can export the PO lines table in CSV or Excel format.

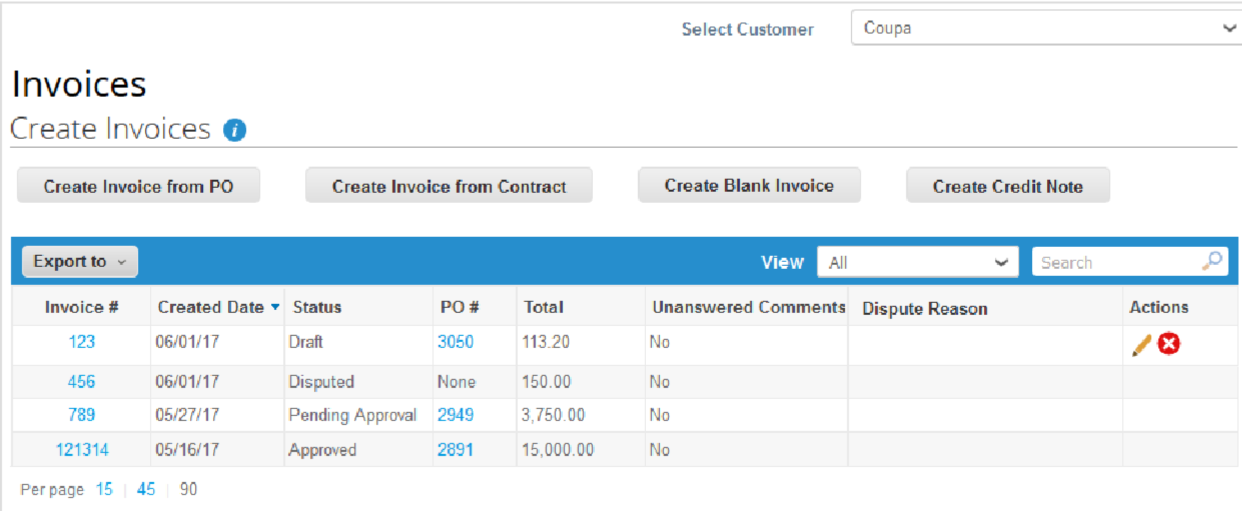
You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see Create Custom Views.

Create or Edit an Invoice

From the drop-down list in the top right corner of the **Invoices** page, select the customer for whom you want to create or edit an invoice or a credit note.

Click on the relevant button above the **Invoices** table to:

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



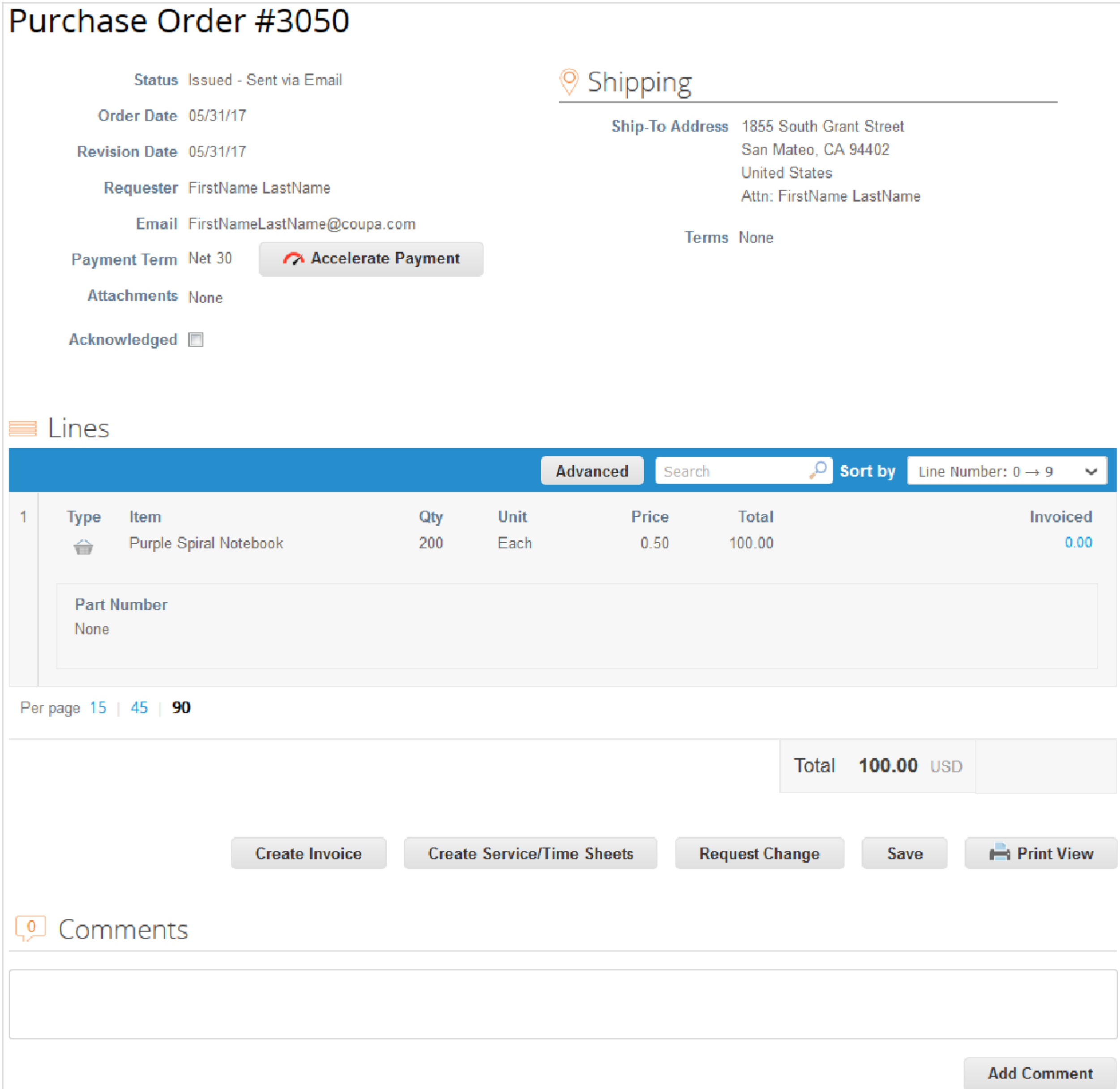
Note: Buttons are active only for the actions that you are allowed to do by your customer. For example, if your customer did not enable you to create invoices without a backing document, the **Create Blank Invoice** button is inactive.

The **Info** icon with the tooltip next to the **Create Invoices** header advises you what to do if you cannot create an invoice as expected, for example, contact your customer to enable more invoicing options for you.

Note: At the top of the page, you might see instructions from Lear.

Create an invoice from a PO

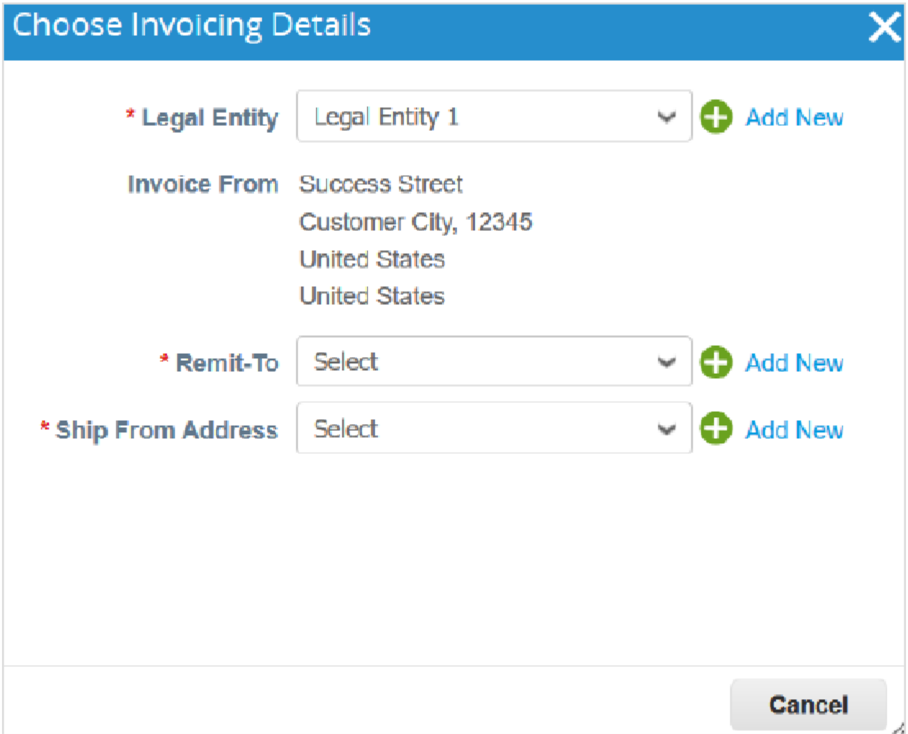
1. Go to the **Orders** page or, on the **Invoices** page, click on the **Create Invoice from PO** button above the table to go to the **Orders** page.
2. On the **Orders** page, do one of the following:
   - Click on the **Create Invoice** () icon for the PO in the **Actions** column of the **Purchase Orders** table.
   - Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button.



3. Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address.

   When you select a legal entity, the popup displays the **Invoice From** addresses available for the legal entity and information about how your customer(s) associated with the legal entity can pay you, for example, "This customer can pay you by Bank Account or Credit Card."

   In case of multiple payment types, you might see multiple **Remit-To** and **Ship From** addresses for the different payment types. To accept a new payment type, you might need to add a new remit-to type.



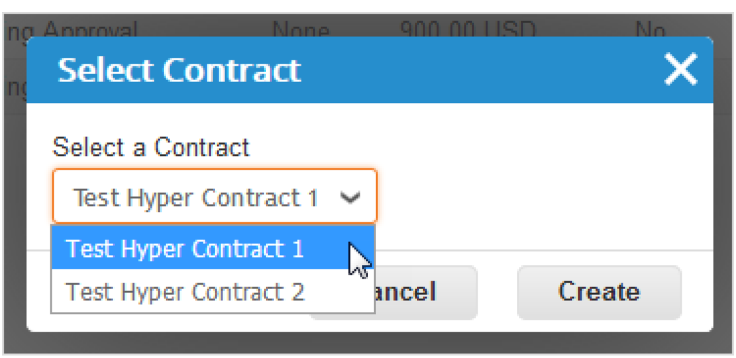
If you do not have a legal entity, you need to add one by clicking on the **Add New** link or on the add/plus ( ) icon. You are guided through creating your legal entity. For more information, see Set up Legal Entities.
The selected or newly created legal entity is added to your invoice.

4. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO. For more information, see Edit an invoice.

> **Note:** You are able to bill multiple invoices per PO (partially invoice each time), so do as necessary to modify the individual invoice quantity/amount to fit your organization's invoicing needs.

Create an invoice from a contract

1. Click on the **Create Invoice from Contract** button above the **Invoices** table on the **Invoices** page and select the relevant contract from the drop-down list.



2. Create a new or choose an existing invoice-from address. See step 3 in Create an invoice from a PO.

3. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. For more information, see Edit an invoice

Create a blank invoice

1. Click on the **Create Blank Invoice** button above the **Invoices** table on the **Invoices** page.
2. Create a new or choose an existing invoice-from address. See step 3 in Create an invoice from a PO.
3. On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. For more information, see Edit an invoice.

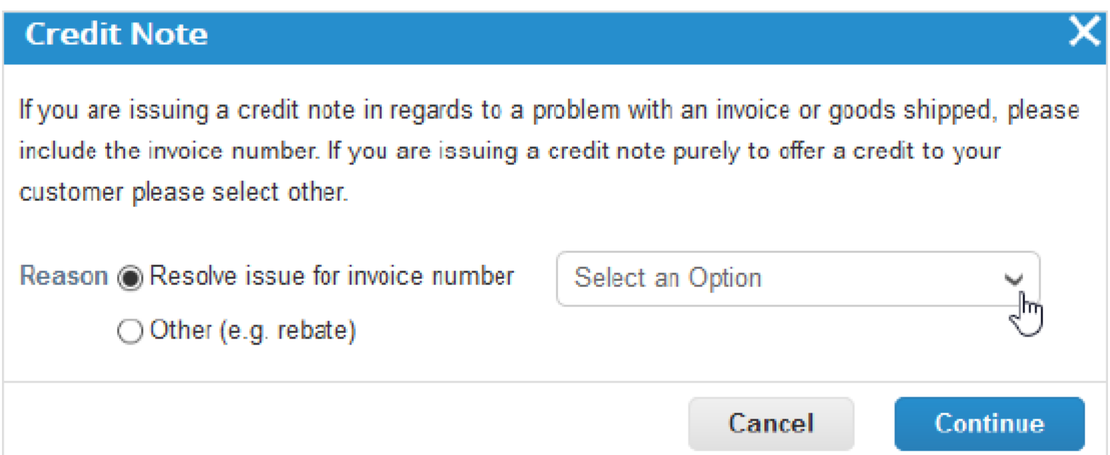
Create a credit note

You can issue a credit note to:

- Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice. For more information, see Disputed invoices.
- Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

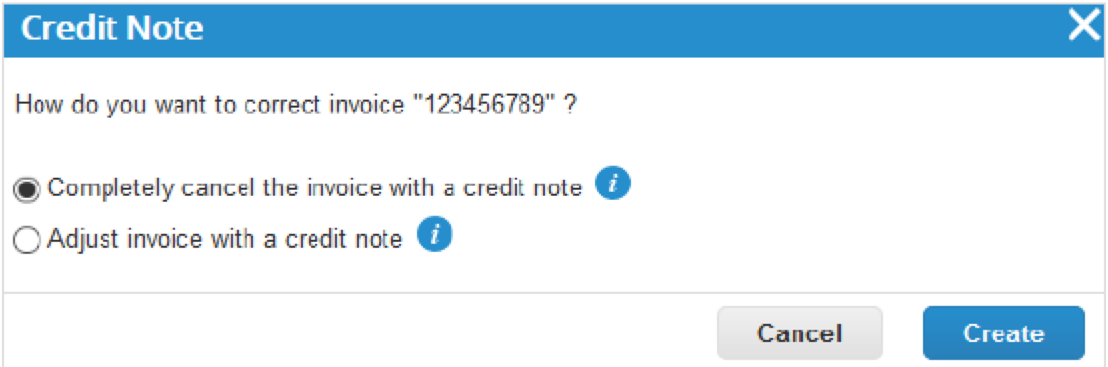
To create a credit note:

1. Click on the **Create Credit Note** button above the **Invoices** table on the **Invoices** page or, on the **Orders** page, click on the **Create Credit Note** ( ) icon for the PO in the **Actions** column of the **Purchase Orders** table.
2. In the appearing **Credit Note** popup, select the reason for your credit note.



   - Resolve a dispute

     If the credit note is related to a problem with an original invoice, select the **Resolve issue for invoice number** radio button and, from the drop-down list, select the invoice number. Click **Continue** to select how you want to resolve the issue.

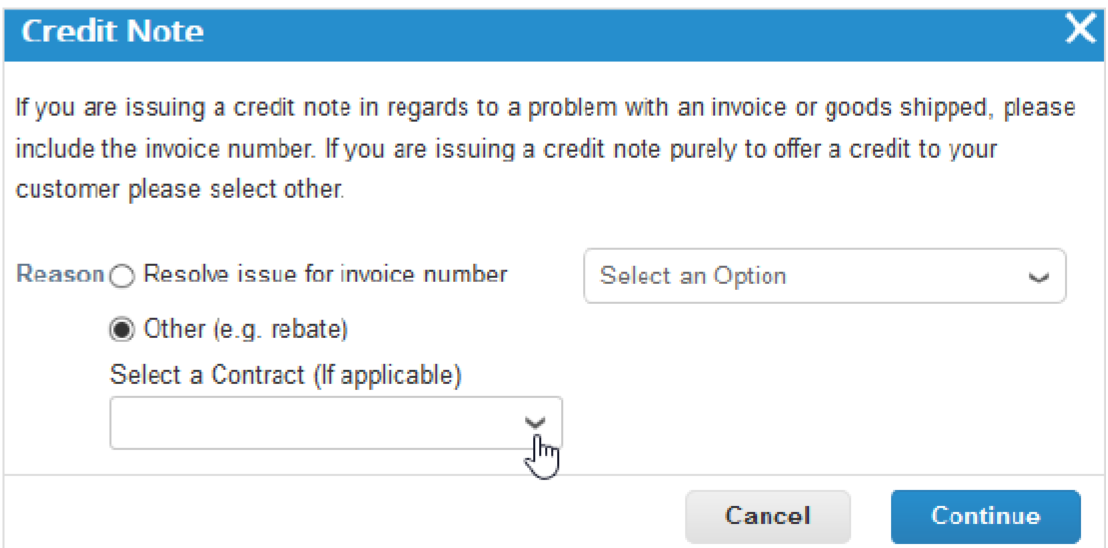


You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it. For more information, see Disputed invoices.

Note: Only quantity or price can be reduced through partial credit notes.

- Record a credit

  Select **Other** and click **Continue.** If a contract is available, you can also select it from the drop-down list.



Create the credit note similarly to creating an invoice. For more information, see Edit an invoice.

If you completely cancel the invoice, you can edit the following fields: **Credit Note Number**, **Credit Note Date**, **Supplier Note**. You can also add attachments (file, URL, or text) and an Image Scan, and modify PO lines, the UNSPSC, and tax reason descriptions. The other fields are pre-populated and not editable so that all the information is carried over 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 are prorated based on the credit amount.

Note: Header level charges (for example, shipping cost, or header level tax) are not brought over from the original invoice. 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 address before editing the invoice. See step 3 in Create an invoice from a PO.

Edit an invoice

Fill in at least the mandatory fields (marked with a red asterisk) in your invoice.

If you create or edit a credit note or a PO-backed invoice, some of the fields are pre-populated with information from the original invoice or the PO.

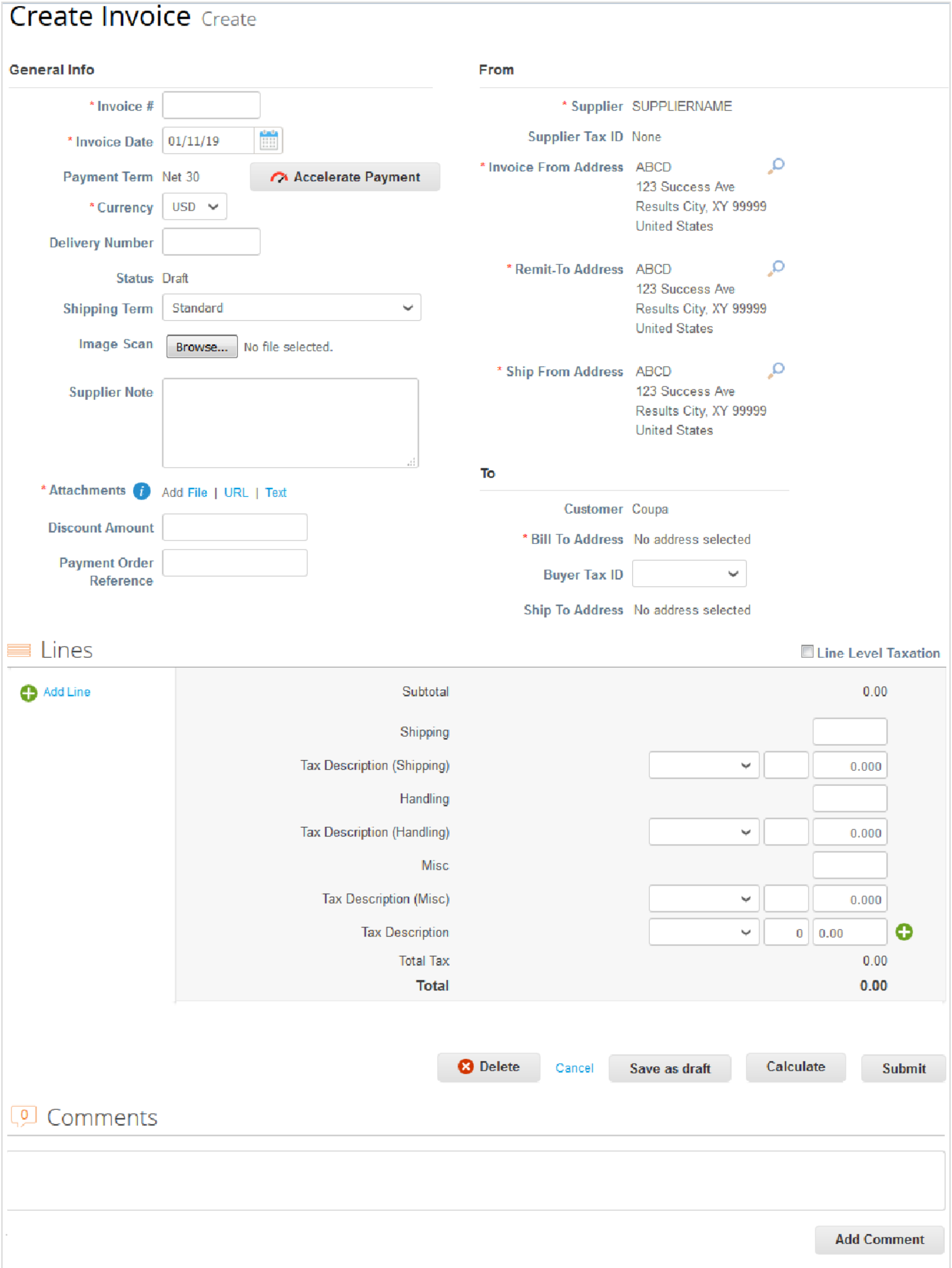
Depending Lear's settings, you will be required to accept the PO and the following restrictions would apply to the corresponding invoice:

- **Currency** – Cannot be changed from PO currency.
- **UOM** – Cannot be changed from PO line UOM.
- **Price** – Cannot be changed from PO line unit price.
- **Quantity** – Can be changed from 0 to the remaining quantity on the PO line.
- **Amount** – Can be changed from 0 to the remaining amount on the PO line.

These restrictions do not apply to credit notes.

To edit a draft invoice, do one of the following:

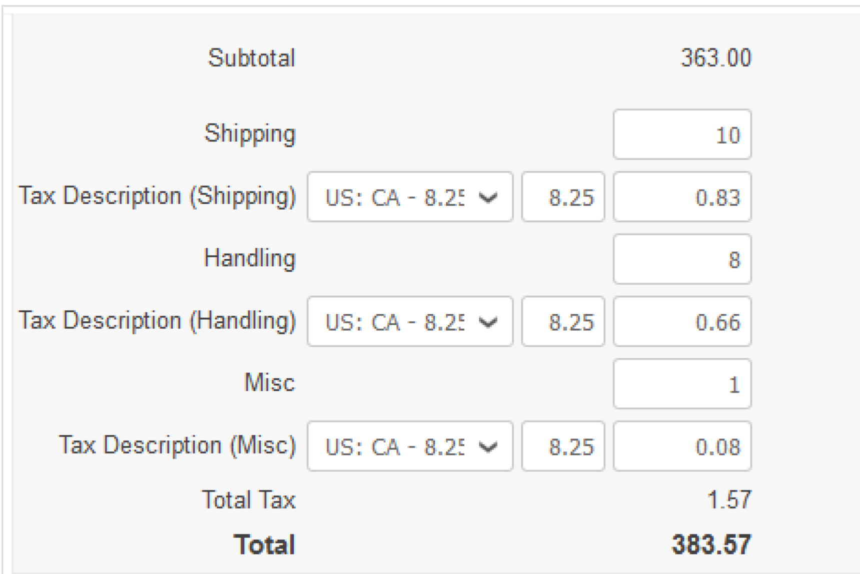
- Click on the **Edit** ( ) icon for the invoice in the **Invoices** table.
- Click on the **Invoice #** link to open the invoice and click on the **Edit** button.



Fill in at least the mandatory fields (marked with a red asterisk). You can create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding **Search** (magnifying glass) icon in the **From** section. You are guided through creating your legal entity. For more information, see Set up Legal Entities.

You can also attach files to an invoice using **Attachment** or **Image Scan**. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

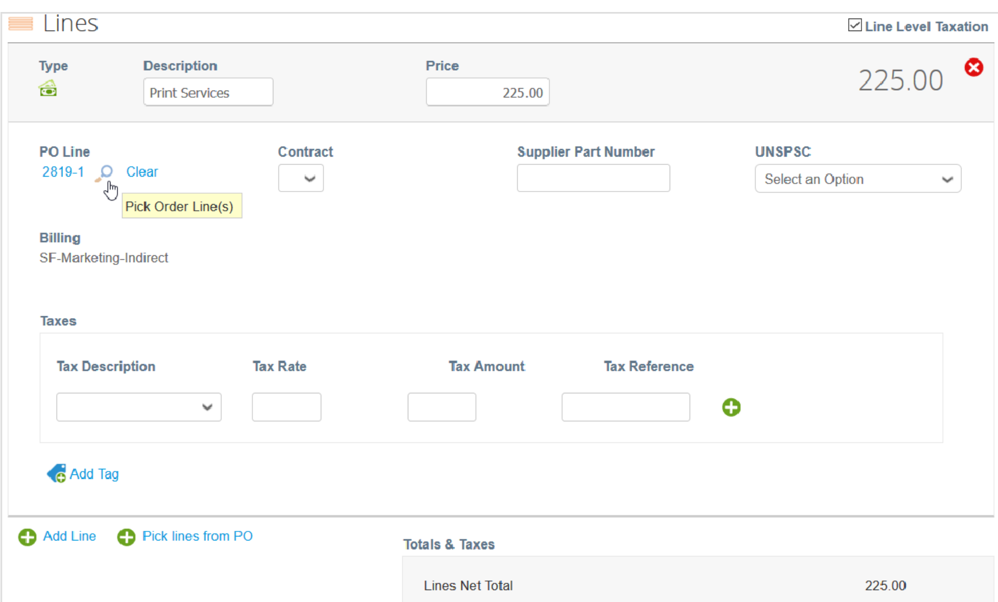
Fill in the appropriate tax rate for your invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.



Clicking **Calculate** will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the **Add Line** link or the **Add** (⊕) icon next to it.

Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.



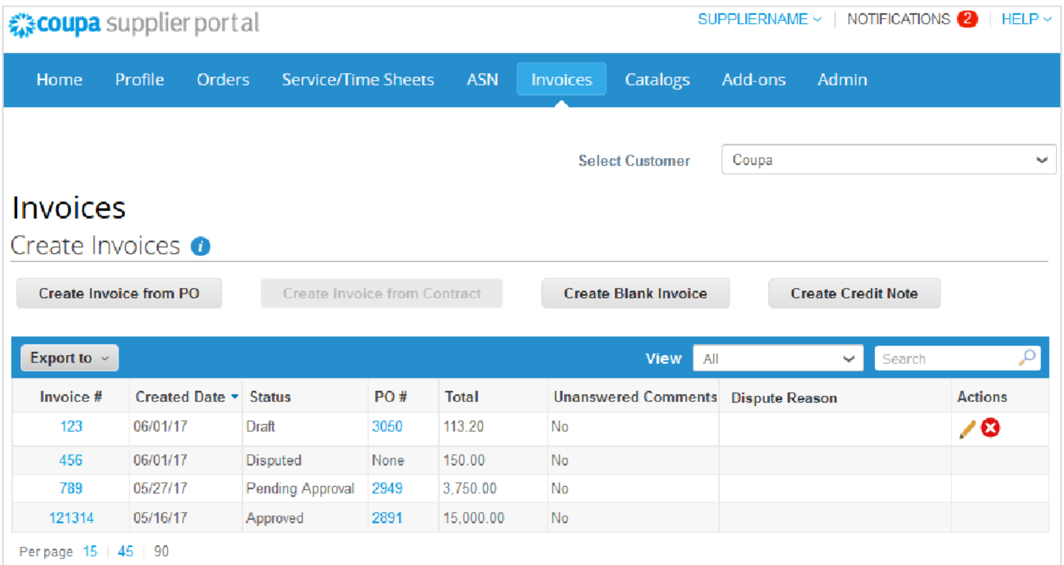
Submit the invoice or save it as a draft to submit it later. You can also add comments on the invoice
When you try to submit an invoice that does not meet Lear's requirements, you might get the following warning message: "This invoice has the following warning(s):", followed by details on what to correct.

Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

Note: If you want to make changes to the invoice after submitting it, you have to contact your Lear Buyer or Accounts Payable team.

View and Manage Invoices

Click on the **Invoices** tab on the main menu. The **Invoices** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose invoices you want to see.

Note: Each individual Lear entity is a standalone customer for your account, and when you visit the page again, it shows you the invoices for the customer you selected last time.

The **Invoices** table shows the following information for all the invoices you sent to the selected customer.

Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Created Date	Date when the invoice was created.
Status	Current status of the invoice. For more information, see the invoice status list below.
PO #	PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO.

Column	Description
Total	Total amount of the invoice. If your customers use country compliant invoicing and enabled the relevant field setting, on legal invoices (PDFs) you can also see the **Totals with Early Payment Discount** section with discounted totals.
Unanswered Comments	Your comments on the invoice for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the customer when you open the invoice.
Dispute Reason	Your customer's reason for disputing the invoice.
Actions	Click on the Edit ( ) or Delete ( ) icon to edit or delete an invoice. You can edit or delete only draft invoices.

Invoices can have the following statuses:

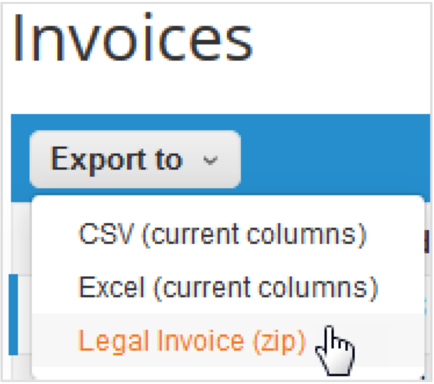
Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. For more information, see Disputed invoices.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Processing	The invoice is between invoice being submitted by the supplier and the submission being recorded in Lear's instance
Pending Approval	The invoice is currently under review by your customer.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.

Above the table you can have instructions from the customer specifying, for example, policies or best practices.

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. For more information, see Create Custom Views.

You can export the invoices table in CSV or Excel format.

If you are from a Coupa e-invoicing compliant country, you can also bulk export all the legal invoice attachments (usually PDFs) in a compressed (.zip) file by selecting the **Legal Invoice (zip)** option from the **Export to** dropdown.



A green message bar informs you that "The data you requested will be emailed to you shortly."

Note: The export usually takes about one minute. In case of a large number of invoices it may take longer.

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

Tip: You can set your **Invoices** table view to show and export your legal invoices by status, created date, invoice date, period of time, and so on.

Online and email notifications are on by default, so if you have not turned off your online notification for **Legal Invoice Export Ready**, you also get a notification in the CSP. For more information, see View and Manage Notifications.

Warning: If you turn off notifications for this feature, the `.zip` file is not generated, so you cannot bulk export your legal invoices. You can see a warning in the message bar to enable your notifications.

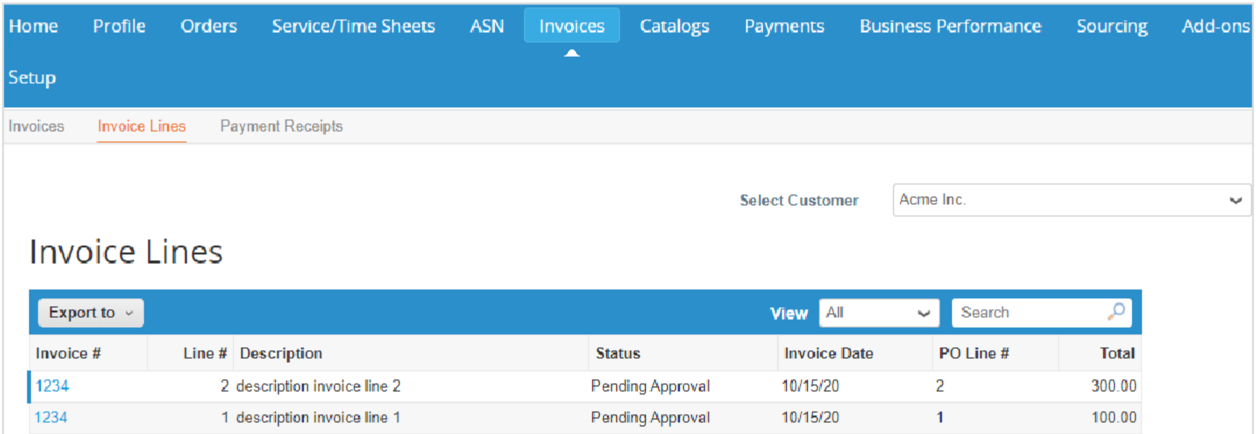
When you click on the **Download Legal Invoices** button in the email or on the notification in the CSP, the compressed file is downloaded to your device.

Note: If you are not logged into the CSP, you are directed to the **Login** page and you need to go to your notifications to download the file; or after logging in, you can click on the **Download Legal Invoices** button from your email notification again.

Warning: The `.zip` file expires 30 days after you export it. After expiration you cannot download it from your email or online notification.

View Invoice Lines

Click on the **Invoice Lines** tab to see information on the invoice lines for each invoice.



From the **Select Customer** drop-down list in the top right corner, select the customer whose invoice lines you want to see.

The **Invoice Lines** table shows the following information for all the invoice lines:

Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Line #	Invoice line number.
Description	Invoice line description.
Status	Current status of the invoice. For more information, see View and Manage Invoices.
Invoice Date	Date when the invoice was created.
PO Line #	PO line number.
Total	Total amount of the invoice line.

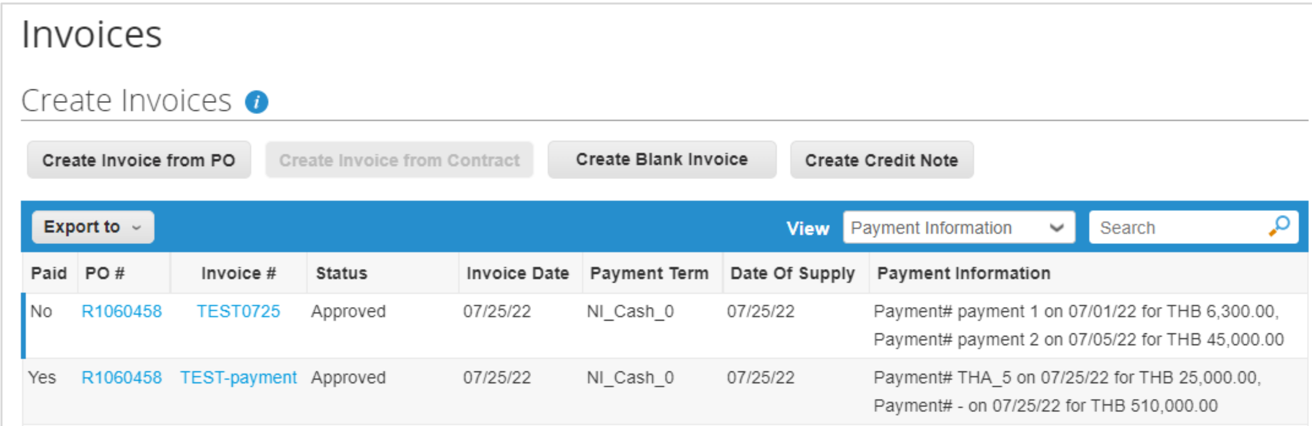
You can export the invoice lines table in CSV or Excel format.

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. For more information, see Create Custom Views.

View Payment information

Payment Information View

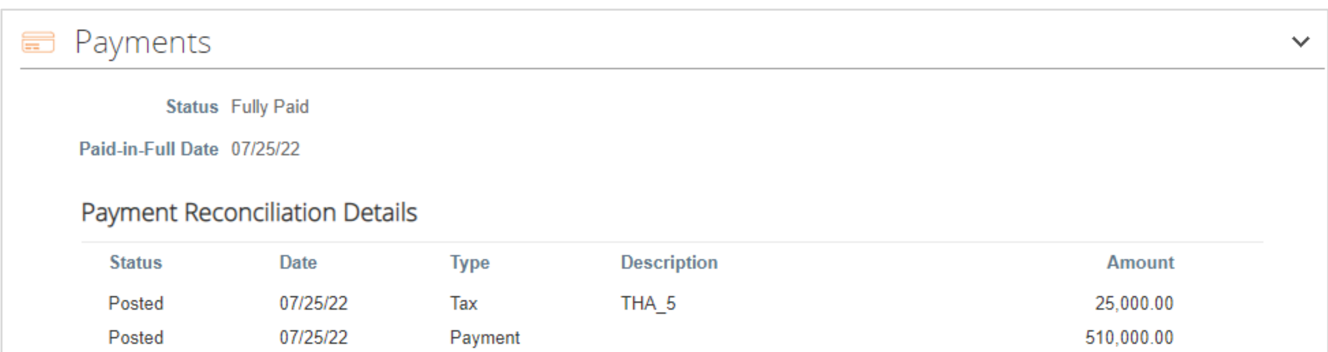
Click on the **Invoices** tab on the main menu and select **Payment Information** view



Note: Only if the submitted invoiced amount has been fully paid by Lear, the **Paid** column will turn into Yes

Payment Section Layout

The **Payments** section layout on the invoice page, can be viewed on any invoice by going to Invoices and viewing an invoice in any status.



Payments section statuses

The **payments** section includes the following payment statuses:

Payment status	Details
Pending document approval	The invoice is currently pending approval and has not been marked as externally paid. There may or may not be payment reconciliation lines on the invoice at this time.
Externally paid	The invoice has been marked as paid, either through the UI or through a payments integration. It does not matter if the invoice is currently pending approval or not.
Ready to pay	The invoice is approved for payment, but does not yet have any payment reconciliation lines on it.
Partially paid	The invoice is approved for payment and has some payment details, but the invoice total has not yet been fully paid or over paid. The remaining balance is greater than 0.

Payment status	Details
Fully paid	The invoice is approved for payment and has been reconciled to a point where the remaining balance is 0.
Overpaid	The invoice is approved for payment and has payment reconciliation lines that bring the amount due to less than 0.

The columns in the Payments section

Columns	Description
Date	Payment date, which date has been paid from Lear
Description	Brief description entered by Lear AP Accountant (if necessary)
Type	“Tax” or “Payment”
Amount	Withholding tax amount associated with the submitted invoice will display in “Tax” type line; The amount (invoiced amount – Withholding Tax amount) actually paid from Lear will display in “Payment” type line.

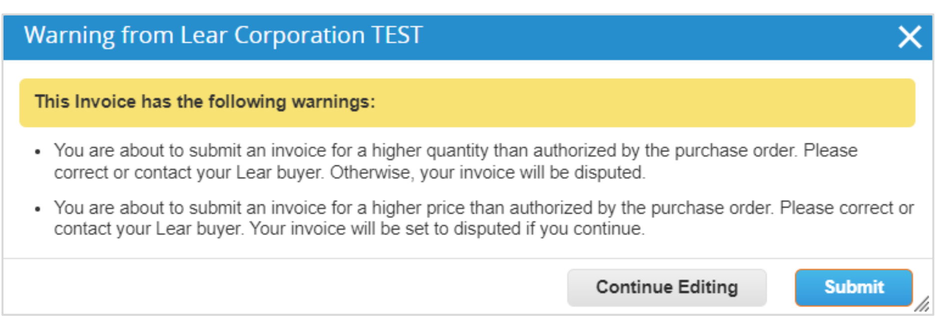
Disputed invoices

Invoice with disputed status is disputed by Lear AP or auto disputed by the system.

Lear will dispute (automatically) any invoice that is:

- Invoice Date backdated more than specified calendar days
- Does not match with the PO’s currency
- Exceeds the PO quantity
- Exceeds the PO unit price (For quantity based POs)
- Exceeds the PO amount (For amount based POs)
- Has a different Unit of Measure (UOM) than the PO line

In case you try to submit an invoice that is exceed any of Lear’s defined above tolerance limits, you will receive a submission warning, in that case do not submit your invoice or it will be disputed automatically. Contact your Lear buyer if a PO amendment is required.



Acting on Disputed e-Invoice

When the status of an invoice changes to "Disputed", you receive an email notification with the invoice number, the date of the dispute, the reason for the dispute, and optionally any additional comments. Your customer can leave comments on the invoice while it is in "Disputed" status.

> **Warning:** Lear does not process disputed invoices for payment until you resolve the dispute.

In the **Invoices** table, click on the invoice number or on the **Resolve** button in the **Actions** column for the disputed invoice that you want to resolve.

To resolve a dispute, click on the relevant button at the bottom of the invoice. Depending on the type of invoice, you have the following options:

Standard e-invoice

- **Void**

  If an invoice was issued in duplicate or has already been paid for through an earlier invoice, void it.

- **Correct Invoice**

  If an invoice has some incorrect information, correct it. When submitting a corrected invoice, you can reuse the same invoice number.

Country compliant e-invoice

> **Tip:** Country compliant e-invoices are marked with a green checkmark next to the country code in their top right corner. Coupa Compliant E-Invoicing Countries List

- **Cancel Invoice**

  If an invoice was issued in duplicate, create a credit note to cancel it.

  If an invoice has some incorrect information (other than price or quantity), for example, incorrect tax rate or item description, create a credit note to cancel it and issue a new corrected invoice. The original invoice remains in disputed status and the corrected invoice is submitted for approval.

  > **Warning:** The corrected invoice must have a new number.

- **Adjust**

  If the price and/or the quantity for invoice lines(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it. You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.

  > **Note:** If Lear disputes an invoice in error, or you choose not to resolve the dispute, inform your Lear counterpart and Lear can withdraw the invoice from dispute and process it.