Table of Contents
Click the title to see each guide

How to Add Users (pages 3-5)
How to view your Intuit PO (pages 6-7)
How to submit an invoice (pages 8-13)
How to view your invoice and payment status (pages 14-18)
Additional Support (page 19)
Coupa Supplier Portal
How to Add Users
Supplier Guide: How to Add Users

This guide will provide Suppliers with step-by-step guidance on how to add additional users to the CSP.

**Step 1:** Log into Coupa Supplier Portal through: https://supplier.coupahost.com/sessions/new

**Step 2:** From the **Home** tab, click **View** in the Registered Users box
**Step 3:** Here you will see all of your current users. To add an additional user click **Invite User**

**Step 4:** Enter user’s information and set their permissions.

**Note:** We recommend you give all of the permissions to all of your users for ease of use.
Coupa Supplier Portal
How to view your Intuit Purchase Order
Supplier Guide: How to view your Intuit Purchase Order(s)

This guide will provide Suppliers with step-by-step guidance on how to view Purchase Orders (POs) in the CSP.

**Step 1:** Log into Coupa Supplier Portal through: https://supplier.coupahost.com/sessions/new

**Step 2:** Click on Orders

This will bring you to a new page where you will be able to see all Purchase Orders.

**Step 3:** In the Select Customer area choose Intuit

**Step 4:** To view details of the Purchase Order, click on the PO#
Coupa Supplier Portal
How to Submit an Invoice
Supplier Guide: How to Submit an Invoice

This guide will provide Suppliers with step by step guidance on how to submit an invoice in the CSP.

Step 1: Log into Coupa Supplier Portal through: https://supplier.coupahost.com/sessions/new

Step 2: Click on Orders to bring up a list of all of your purchase orders

Step 3: In the Select Customer drop down select Intuit

Step 4: Click on the PO # that the invoice applies to from the drop down list
Step 5: Scroll towards the bottom of the page to click Create Invoice.

Step 6: A new screen will automatically open. Enter Invoice# and Invoice Date. The Payment Terms and Currency will default from the PO. Attach a copy of the invoice by clicking Choose File. Acceptable file types include PNG, GIF, JPG, JPEG, PJPEG, TIFF, and PDF.

Note: Any field with a red asterisk are required fields and must be populated in order to proceed.

In addition to the required fields we ask that you always include an invoice image.
Step 7: You will now enter the amount to be invoiced - either in the **Price** field (for services) or in the **Qty** field if for goods. Please also include any relevant tax by line item.

**Note:** The value will auto-populate with the current PO balance available for invoicing. It is important to **only invoice for actual goods shipped or services rendered** so please update accordingly.
Step 8: Once each of the invoice lines are updated enter shipping and miscellaneous charges (including any related tax) as they apply to this invoice.

Step 9: Click Calculate which will update the Total amount due. Updates will be reflected on each line and additional charges will populate.

Step 10: When you are ready to send, click Submit.
**Step 11:** A pop up will appear with the invoice amount. Make sure the amount matches as it’s shown on your invoice. If the invoice information is correct, click **Send Invoice**.

**Step 12:** A warning message will appear. Please ensure that the value of the invoice reflects the amount of goods shipped or services rendered. Once confirmed, select **Submit**.

**Note:** You have now submitted an invoice to Intuit which our AP team will process. They will reach out to you if there are any questions.
Coupa Supplier Portal
How to Check Invoice & Payment Status
Supplier Guide: How to view invoice and payment status

This guide will provide Suppliers with step-by-step guidance on how to view invoices in the CSP as well as how to see payment details once applied.

**Step 1:** Log into Coupa Supplier Portal through: https://supplier.coupahost.com/sessions/new

**Step 2:** Click on Invoices
Step 3: On the Invoices tab, you can view Invoices that have been submitted through Coupa Supplier Portal. The Status column will show you the status of the invoice.

Note: Be sure to select the appropriate Customer

Invoice Status and Description:

- **Approved**: The invoice has been accepted for payment by Intuit
- **Disputed**: The invoice has been disputed
- **Draft**: The invoice has been created, but it has not been submitted to Intuit yet
- **Pending Approval**: The invoice is currently under review by Intuit
- **Processing**: The invoice is being processed by the AP department and should be paid soon
- **Voided**: Something is wrong with the invoice and Intuit had to Void the invoice
Step 4: In the **View** dropdown, select **Payment Information**

The current view will update to display new fields including **Invoice Date**, **Payment Terms** and **Payment Information** (if paid)

Step 5: to view further details about a specific invoice, click on the Invoice # in blue
**Step 6:** To view payment details, scroll down to Payments section and click the arrow icon.

If the invoice is paid, you will see payment details including **Date** and **EFT tracking number**.

In this example, the invoice has been paid. If it is not paid the details will be blank.
Additional support

Visit our Supplier Programs site for additional information and reference guides.

You can also reach out to us at SupplierConnect@Intuit.com.