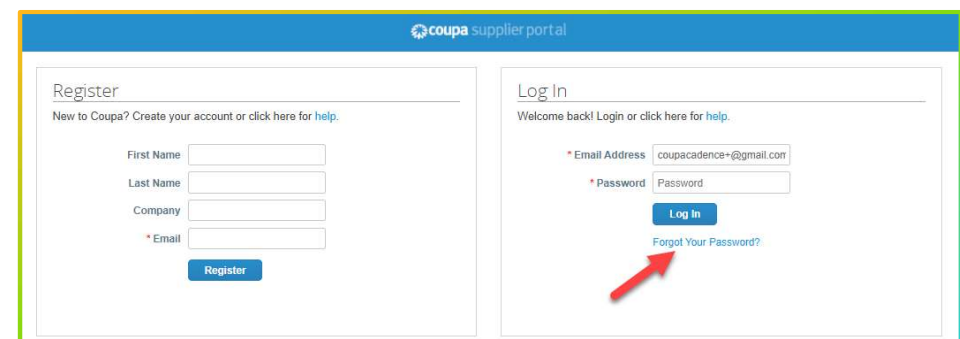
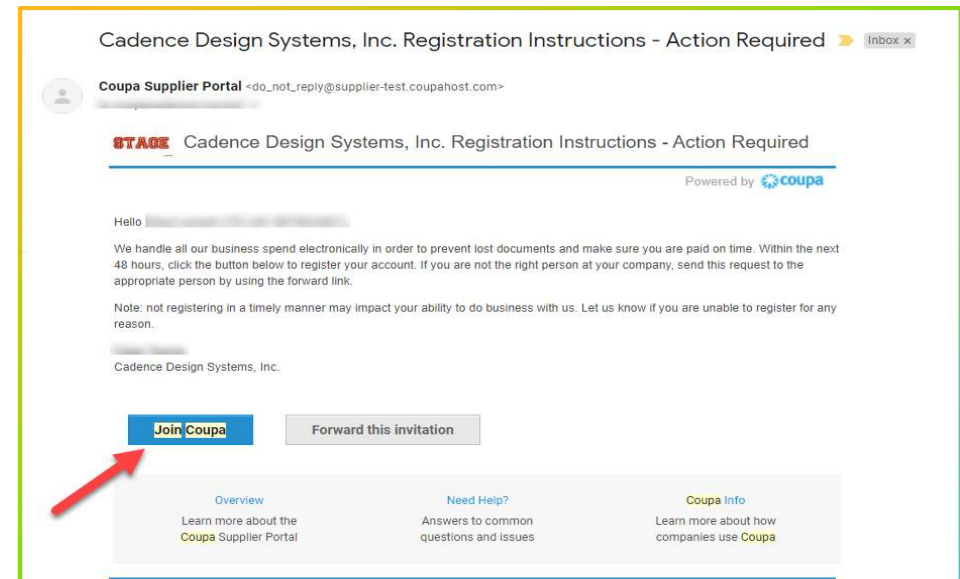


# Frequently Asked Questions

- How to access Coupa portal again? Forgot password?
- How to invite more members from the same organization?
- How can vendors select/change customers?
- How can we print the PO?
- What should be populated on the header text field while creating invoice/credit note?
- How to charge only one line out of a multiple line PO?
- How to check invoice/credit note status?
- Where can disputed or voided invoice can be seen? How can disputed invoice be resolved?
- Any further questions?

# Frequently Asked Questions

- How to access Coupa portal again? Forgot password?
  - Please revert to the email invitation and click on join Coupa and it will revert you back into the portal.
  - If you have forgotten your password – please open the Coupa portal link and click on forgot password. Coupa will then take you through the procedure to reset your password.
  - Tip: save the link to your favorites tab once you open it for the first time.



# Frequently Asked Questions

- How to invite more members from the same organization?
  - More members can be invited by the main Coupa member. By clicking on setup, invite user and enter information as required.
  - New members will be able to create an account and execute all tasks as needed.

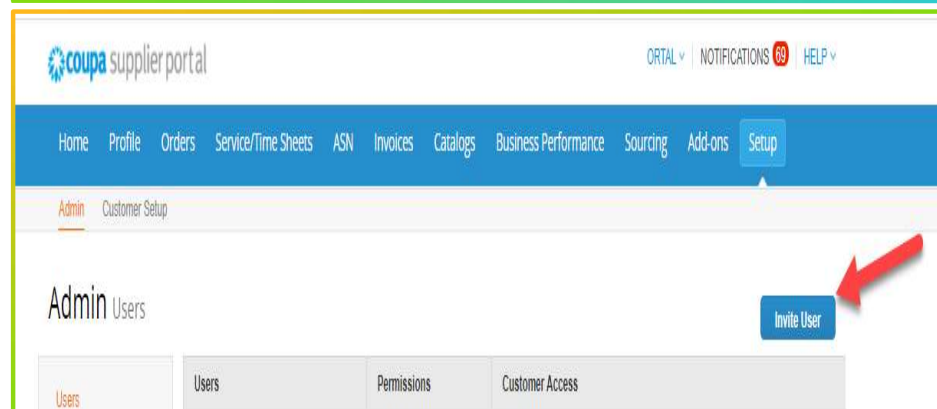
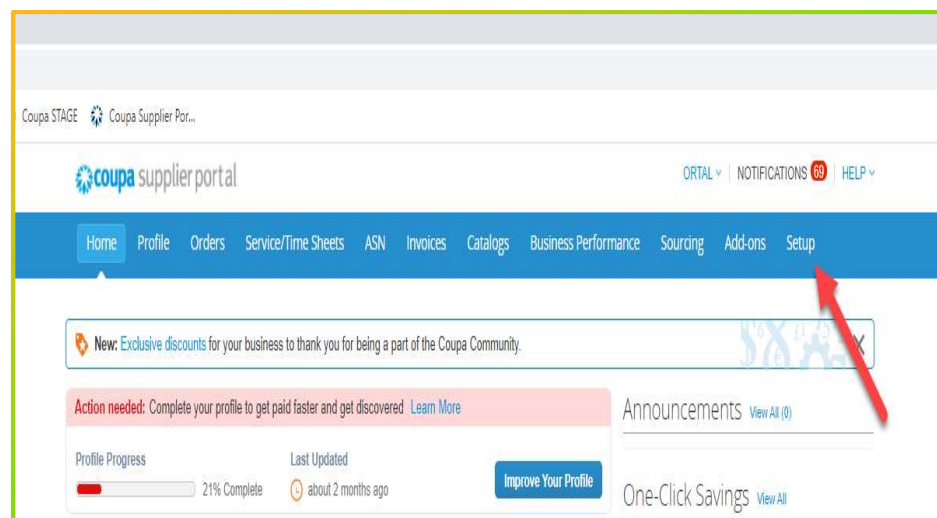
## Invite User

First Name

Last Name

\* Email

Permissions ⓘ Customers



# Frequently Asked Questions

- How can vendors select/change customers?
  - For viewing orders: Click on Orders, Select Customer and choose from the list.
  - For creating/billing: Click on Invoices, Select Customer and choose from the list.

coupa supplier portal

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

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer

Cadence Design Systems, Inc. - Direct current L  
Cadence Design Systems, Inc. - Direct current LTD (341-0070034451)  
Cadence Design Systems, Inc. - Direct Current LTD (307-0070034492)

Purchase Orders

Instructions From Customer

Cadence has specific requirements when it comes to invoices related to services performed. 1. Please change the text in the item description to match the services performed, the time frame, and the number of hours. Example for contractors or consultants "John Doe w/e 09/18/2020 40hrs" for services "Window cleaning, San Jose, Sept 2020". 2. Header Text field, for Services please copy/paste the same information as Item Description. For goods, please just put the invoice #. \*\*Should the requirements not be met, the applicable invoice may be returned without payment issued until it is fixed and resubmitted\*\*

Click the Action to Invoice from a Purchase Order

coupa supplier portal

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

Invoices Payment Receipts

Select Customer

Cadence Design Systems, Inc. - Direct current L  
Cadence Design Systems, Inc. - Direct current LTD (341-0070034451)  
Cadence Design Systems, Inc. - Direct Current LTD (307-0070034492)

Invoices

Instructions From Customer

Cadence has specific requirements when it comes to invoices related to services performed. 1. Please change the text in the item description to match the services performed, the time frame, and the number of hours. Example for contractors or consultants "John Doe w/e 09/18/2020 40hrs" for services "Window cleaning, San Jose, Sept 2020". 2. Header Text field, for Services please copy/paste the same information as Item Description. For goods, please just put the invoice #. \*\*Should the requirements not be met, the applicable invoice may be returned without payment issued until it is fixed and resubmitted\*\*

Create Invoices

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

# Frequently Asked Questions

- How can we print the PO?
  - Click on Orders, find the PO and open it.
  - Click on print view and it will give you the option to print.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below this, a secondary navigation bar lists 'Orders', 'Order Line Items', 'Returns', 'Order Changes', 'Order Line Changes', and 'Shipments'. A 'Select Customer' dropdown is set to 'Cadence Design Systems, Inc. - Direct current L'. The main content area is titled 'Purchase Orders' and contains 'Instructions From Customer' and a table of purchase orders. A red arrow points to the 'Orders' menu item, and another red arrow points to the first row of the table.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
490135110	10/08/20	Issued	None	2 Each of R27 Test #39 PO#1 - Line #1 2 Each of R27 Test #39 PO#1 - Line #2	No	1,800.00 ILS		

The screenshot shows a detailed view of a purchase order line item. It includes a table with columns for 'Type', 'Item', 'Qty', 'Unit', 'Price', 'Total', and 'Invoiced'. Below the table, there are fields for 'Need By', 'Part Number', 'Manufacturer Name', 'Manufacturer Part Number', and 'Tax Codes'. At the bottom, there is a 'Total' summary and three buttons: 'Create Invoice', 'Save', and 'Print View'. A red arrow points to the 'Print View' button.

Type	Item	Qty	Unit	Price	Total	Invoiced
	R27 Test #39 PO#1 - Line #3	2	Each	300.00	600.00	300.00

Need By: 10/31/20  
Part Number: None  
Manufacturer Name: None  
Manufacturer Part Number: None  
Tax Codes: None

Total: 1,800.00 ILS

Per page: 15 | 45 | 90

Buttons: Create Invoice, Save, Print View

# Frequently Asked Questions

- What should be populated on the header text field while creating invoice/credit note?
  - Header text field is a compulsory field.
  - Tip: use this field for a future reference to be able to track invoices/payments.

Select Customer: Cadence Design Systems, Inc. - [Dropdown] [Configure PO Delivery](#)

### Create Invoice [Create](#)

#### General Info

\* Invoice # [Text Field]  
\* Invoice Date: mm/dd/yy [Calendar Icon]  
Payment Term: NT35  
\* Currency: ILS [Dropdown]  
Status: Draft  
Shipping Term: GR-Ground [Dropdown]  
\* Image Scan: [Choose File](#) No file chosen  
Supplier Note: [Text Area]  
Attachments: [Add File](#) | [URL](#) | [Text](#)

#### From

\* Supplier: (341-0070034451)  
Supplier Tax ID: 83168483 [Dropdown]  
\* Invoice From Address: [Dropdown]  
Test  
46910 Tel-Aviv  
Israel  
\* Remit-To Address: [Dropdown]  
Test  
Test  
46910 Tel-Aviv  
Israel  
\* Ship From Address: [Dropdown]  
Test  
Test  
46910 Tel-Aviv  
Israel

#### To

Customer: Cadence Design Systems, Inc.  
Buyer Tax ID: [Text Field]  
\* Header Text: [Text Area]  
Use \* if you want this text to appear on the payment.

# Frequently Asked Questions

- How to charge only one line out of a multiple line PO?
- Populate all required fields while creating the invoice/credit note and remove all unbilled lines by clicking on the red X.

The screenshot displays a 'Lines' interface with three line items. Each line item includes a header row with 'Type', 'Description', 'Qty', 'UOM', and 'Price'. Below each header is a form for 'PO Line', 'Contract', 'Supplier Part Number', and 'Tax Codes'. A 'Billing' section contains a text field with the value '341-42703-WPR-K--HW-MON-640000'. A 'Taxes' section contains a table with columns for 'Tax Description', 'Tax Rate', 'Tax Amount', and 'Tax Reference'. The first line has a price of 600.00 and a tax amount of 102.00. The second line has a price of 600.00 and no tax. The third line has a price of 300.00 and no tax. A red arrow points to the red 'X' icon next to the price field of the second line.

Type	Description	Qty	UOM	Price
	R27 Test #39 PO#1 - Li	2.00	Each	300.00
PO Line	490135110-1			
Contract				
Supplier Part Number				
Tax Codes	None			
Billing	341-42703-WPR-K--HW-MON-640000			
Taxes				
Tax Description	Tax Rate	Tax Amount	Tax Reference	
IL: Standard Rate -IL	17.0	102.00		
Type	Description	Qty	UOM	Price
	R27 Test #39 PO#1 - Li	2.00	Each	300.00
PO Line	490135110-2			
Contract				
Supplier Part Number				
Tax Codes	None			
Billing	341-42703-WPR-K--HW-MON-640000			
Taxes				
Tax Description	Tax Rate	Tax Amount	Tax Reference	
Type	Description	Qty	UOM	Price
	R27 Test #39 PO#1 - Li	1.00	Each	300.00

# Frequently Asked Questions

- How to select the correct VAT code?
  - Select line level taxation while creating the invoice and select the correct VAT code from your original invoice.
  - Tip: check the last part of the invoice presentation and make sure the total amount matches your original invoice total.

Lines

Type	Description	Qty	UOM	Price
	R27 Test #39 PO#1 - Li	2.00	Each	300.00

PO Line: 490135110-1  
Contract: [Dropdown]  
Supplier Part Number: [Field]  
Tax Codes: None

Billing: 341-42703-WPR-K-HW-MON-649000

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
[Dropdown]	[Field]	[Field]	[Field]

UOM: [Field] Price: [Field]

Add Tag

Add Line Pick lines from PO

Totals & Taxes

Lines Net Total	1,500.00
Shipping	[Field]
Tax	[Field] % 0.000
Tax Reference	Enter a tax reason description
Misc	[Field]
Tax	[Field] % 0.000
Tax Reference	Enter a tax reason description
Total Tax	0.00
Net Total	1,500.00
<b>Total</b>	<b>1,500.00</b>

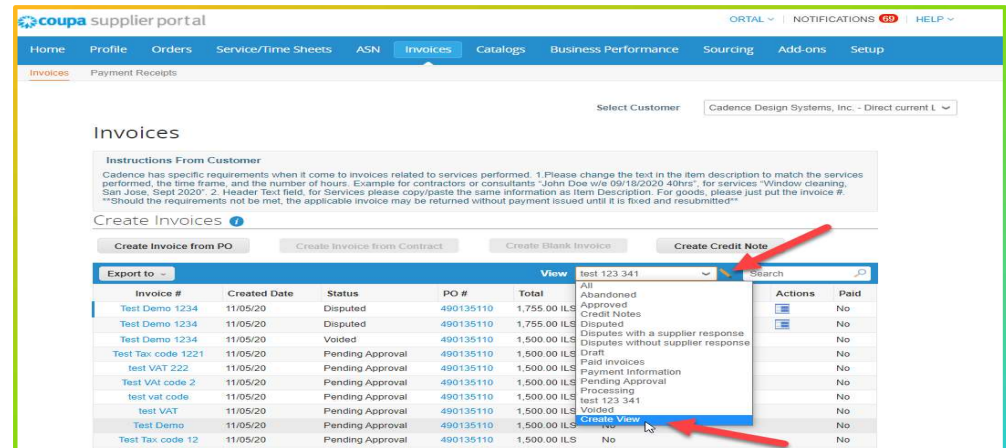
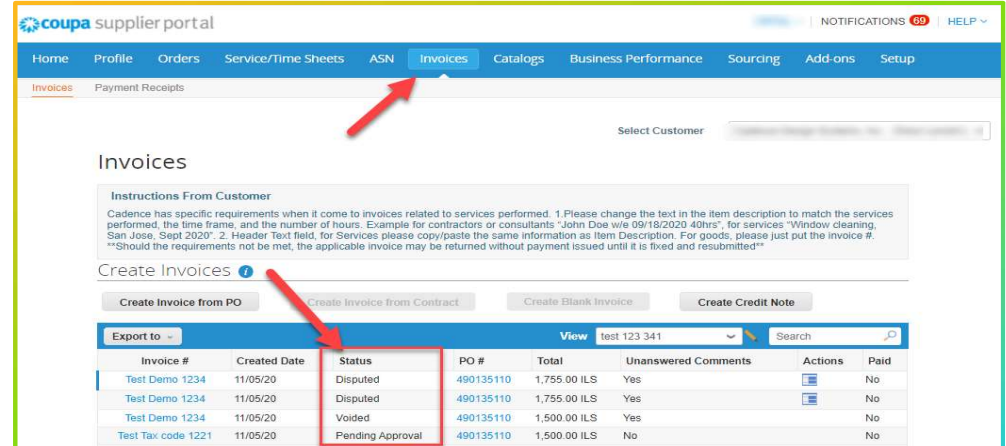
Delete Cancel Save as Draft Calculate Submit



# Frequently Asked Questions

- How to check invoice/credit note status?

- Invoice status is displayed on the main Invoices tab.
- Tip: create a new view in the invoice tab and add extra fields to give a better view about payments.
- Payment information, Paid (yes/No), Invoice date and payment terms could be added to the view by dragging them to the selected headers. (right column)



# Frequently Asked Questions

- Where can disputed or voided invoice can be seen? How can disputed invoice be resolved?
  - All disputed / voided invoices are sent back to the vendors as an e-mail message and notification in Coupa portal.
  - Notifications can be found at the top right corner and the reason of dispute can be viewed there.
  - Invoice/credit note resolution can be done by going to Invoices tab, choose the relevant invoice/credit note and by clicking on the resolve button, corrections can be made and re-submitted.

coupa supplier portal

ORTAL | NOTIFICATIONS 20 | HELP

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

### My Notifications

View: All

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	Invoice UATTESTR27#38_v3 for 600.00 has been approved to pay by Cadence Design Systems, Inc...	11/09/20 04:47 PM
<input type="checkbox"/>	New comment from Cadence Design Systems, Inc. on Invoice Test Demo 1234	11/05/20 10:00 AM
<input type="checkbox"/>	Invoice Test Demo 1234 for 1,500.00 has been disputed by Cadence Design Systems, Inc...	11/05/20 10:00 AM
<input type="checkbox"/>	Invoice Test Demo 1234 for 1,500.00 has been disputed by Cadence Design Systems, Inc...	11/05/20 09:52 AM
<input type="checkbox"/>	New comment from Cadence Design Systems, Inc. on Invoice Test Demo 1234	11/05/20 09:52 AM
<input type="checkbox"/>	Invoice Test Demo 1234 for 1,500.00 has been disputed by Cadence Design Systems, Inc...	11/05/20 09:47 AM

coupa supplier portal

ORTAL | NOTIFICATIONS 20 | HELP

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

Invoices Payment Receipts

Select Customer: Cadence Design Systems, Inc. - Direct current L

### Invoices

Instructions From Customer

Cadence has specific requirements when it comes to invoices related to services performed. 1. Please change the text in the item description to match the services performed, the time frame, and the number of hours. Example for contractors or consultants: "John Doe wire 09/18/2020 40hrs", for services "Window cleaning, San Jose, Sept 2020". 2. Header Test field: for Services please copy/paste the same information as item Description. For goods, please just put the invoice #. \*\*Should the requirements not be met, the applicable invoice may be returned without payment issued until it is fixed and resubmitted\*\*

Create Invoices

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions	Paid	Payment Information	Payment Term
None	11/10/20	Draft	490135110	1,500.00	No		No	NT35	
UATTESTR27#38_v3_credit	11/09/20	Pending Approval	490135102	-351.00	No		No	NT35	
UATTESTR27#38_v3	11/09/20	Approved	490135102	702.00	No		No	NT35	
Test Demo 1234	11/05/20	Disputed	490135110	1,755.00	Yes		No	NT35	
Test Demo 1234	11/05/20	Disputed	490135110	1,755.00	Yes		No	NT35	

# Frequently Asked Questions

- Any further Questions?
- Please contact: [gssemeaproc@cadence.com](mailto:gssemeaproc@cadence.com)

