

The background of the entire page is a close-up photograph of numerous stacks of light-colored wood planks. The planks are arranged in a way that creates a sense of depth and texture, with various shades of tan and brown. A semi-transparent teal banner is overlaid on the middle of the image, containing the title and date.

# Coupa @ Tolko

Supplier Reference Guide

Created July 2023

# Coupa at Tolko

This document contains useful resources to help you in our shared journey to drive change with digital invoicing with Tolko

## Context

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We recognized various opportunities in the areas of invoice processing, payments and eProcurement, and we've embarked on a technology enabled transformation of our procure-to-pay processes. We are integrating Coupa, a cloud-based business spend management platform, with our JDE system to gain greater efficiencies and to improve our overall responsiveness.

This document consists of useful resources containing instructions and training materials outlining how you can best leverage the "Coupa Supplier Portal" for future transactions. The [Coupa Compass Portal](#) is a great resource to get familiarized with the system as well.

Thank you for your continued business partnership and support of Tolko's procure-to-pay transformation. Feel free to get in touch with us to know more about our integration journey. For technical assistance please contact the [Coupa Support Team](#).

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# Coupa Supplier Portal (CSP) Resources

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# Useful CSP Links to Coupa Compass Portal

The Coupa Compass portal contains numerous reference materials and instructions. These are some useful links to get started with Coupa:

#	Topic	Description
1	<a href="#">Setting Up CSP Accounts</a>	After receiving your invitation, create and setup your CSP account to begin your journey on Coupa.
2	<a href="#">Respond to SIM Request</a>	To get started with Coupa, Tolko suppliers will need to respond to a supplier information request. To complete the online form, navigate to the "Information Requests" section of the "Profile" tab.
3	<a href="#">Manage User Roles</a>	An admin user can add new users to the portal, manage user permissions, deactivate and reactivate user accounts.
4	<a href="#">Merging CSP Accounts</a>	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. In such situations the CSP accounts can be merged into one.
5	<a href="#">View and Manage Notifications</a>	Notifications preferences can be customized to fit each user.
6	<a href="#">View and Manage POs</a>	Suppliers can view purchase orders received from customers by navigating to the "Orders" tab.
7	<a href="#">View and Manage Invoices</a>	Suppliers can view invoices submitted to customers by navigating to the "Invoices" tab. The link also details how to manage disputed invoices.
8	<a href="#">Create or Edit Invoices</a>	Suppliers can create new invoices or make changes to existing invoices in Coupa following a few simple steps. Tolko suppliers will only be creating blank invoices (non-PO backed invoices) or invoices from POs (PO backed invoices). The link also outlines how a Credit Note can be created.
9	<a href="#">Setup Legal Entities and Tax IDs</a>	This is a <b>mandatory</b> step in Coupa and must be completed by all suppliers. Supplier are mandated to setup Tax IDs and the Invoice From Address. Scroll down to the "What is your Tax ID?" section of the webpage to learn how to add Tax/VAT IDs or registration numbers.
10	<a href="#">Compliant Invoice Examples</a>	Canada has multiple tax types which can be applied to an invoice (e.g., GST, PST, QST & HST). Additionally, on Canadian invoices, more than one tax line can be present per invoice line ("multi-tax lines"). Learn more about compliant invoices in Canada by clicking the link.

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# Invoice Creation

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# Invoice Types in Coupa

There are four types of “Invoice” documents:

## INVOICE

PO-Backed

*Invoice raised by the supplier against a purchase order from a Tolko buyer*

Scroll down to the “Create an invoice from a PO” section of the [webpage](#) to know more.

## INVOICE

Non-Backed

*Invoice raised by the supplier for goods or services that haven't been ordered by a Tolko buyer*

Scroll down to the “Create a blank invoice” section of the [webpage](#) to know more.

## CREDIT NOTE

Invoice-Backed

*Document from the supplier to Tolko against an invoice to offset the price of a future purchase (credit)*

Scroll down to the “Create a credit note” section of the [webpage](#) to know more.

## CREDIT NOTE

Non-Backed

*Document from the supplier to Tolko to offset the price a future purchase (credit)*

# Adding Multi-Line Taxes on Invoices

When [creating an invoice](#), Tolko requires that supplier add multi-line taxes (*when applicable*) by scrolling down to the “Lines” section of the invoice and following the steps outlined below. For example, if GST and PST apply to the invoice line, Tolko expects suppliers to add both at a line level.

**Lines**

Type	Description	Qty	UOM	Price
Qty ▾	<input type="text"/>	1.000	Bag ▾	0.00

0.00 ✕

PO Line	Service/Time Sheet Line	Contract	Supplier Part Number
None	None	▾	<input type="text"/>

**Taxes**

Tax Type	Tax Rate	Tax Amount	Tax Reference
▾	▾	0.00	<input type="text"/>
<span style="color: green; font-weight: bold; font-size: 24px; vertical-align: middle;">1</span> <span style="color: green; font-weight: bold; font-size: 24px; vertical-align: middle; margin-left: 10px;">2</span> <span style="color: green; font-weight: bold; font-size: 24px; vertical-align: middle; margin-left: 10px;">+</span>			

- 1
 Click the drop-down menu on “Tax Type” and select the appropriate option. Once complete, ensure the Tax Rate is also correct.
- 2
 Clicking the green circle will add another tax line. Provincial taxes can be added separately on this tax line if applicable,

# Adding Summary Charges on Invoices

When [creating an invoice](#), suppliers can add summary charges under the “Totals and Taxes” section and following the steps outlined below. As per the regular invoice lines, Tolko requires suppliers to also apply multi-line taxes against each of the applicable Summary Charges.

**Totals & Taxes**

Lines Net Total	0.00
Lines Tax Totals	0

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**1** Shipping

Tax   0.000

+ Tax Reference

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**2** Handling

Tax   0.000

+ Tax Reference

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**3** Misc

Tax   0.000

+ Tax Reference

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Total Tax	0.00
Net Total	0.00
<b>Gross Total</b>	<b>0.00</b>

1

Shipping charges and taxes on these charges can be added. Clicking the green circle will add another tax line to the charge.

2

Handling charges and taxes on these charges can be added. Clicking the green circle will add another tax line to the charge.

3

Misc. charges and taxes on these charges can be added. Clicking the green circle will add another tax line to the charge.



# Creating an Invoice Using Supplier Actionable Notification

Suppliers who are unable to use the CSP can use the Supplier Actionable Notification (SAN) function to create and send their invoices to Tolko. Once the supplier receives the PO via email, they will be able to create an invoice by following the steps outlined below:

The screenshot displays the Tolko Supplier Actionable Notification (SAN) interface. At the top, it shows 'Tolko | TEST Environment' and 'Tolko Industries Ltd. Purchase Order #335'. Below this is an 'Order Summary' section with the following details:

- Date: 07/07/23
- PO Total: 1,000.00 CAD
- Payment Terms: D04 - 2% 10 days, Net 30
- Contact: Dummy 2 Demo, [tolkotestuser+2@gmail.com](mailto:tolkotestuser+2@gmail.com)

Below the summary are two main action buttons: 'Manage Order' and 'Create Invoice'. A green circle with the number '1' is positioned to the right of the 'Create Invoice' button, indicating the first step in the process. Underneath these buttons, it says 'Orders details below'. At the bottom of the interface, there are three icons with labels: 'Acknowledge PO' (checkmark icon), 'Add Shipment Tracking' (shopping cart icon), and 'Add Comment' (speech bubble icon).

- 1 Click "Create Invoice". The supplier will be taken to a new page where they can create and send their invoice to Tolko.

**NOTE:** Suppliers are recommended to use the CSP to create invoices. Suppliers will not be able to view/edit old invoices if they are made using SAN.

# Selecting the Requester

When submitting a **non-backed invoice** (an invoice that is not against a PO), you will need to enter the “Requester Email” and “Requester Name”. **The contact information you send should be representative of the Tolko employee who initiated the purchase.**

The screenshot shows a form titled "To" with a location pin icon. The form contains the following fields:

- Customer: Tolko Industries Ltd.
- \* Bill To Address: No address selected (with a search icon)
- Buyer Tax ID: A dropdown menu.
- \* Ship To Address: No address selected (with a search icon)
- \* Requester Email: A text input field, highlighted with a green circle containing the number 1.
- \* Requester Name: A text input field, highlighted with a green circle containing the number 2.
- Division: A dropdown menu with "Select" as the current value.

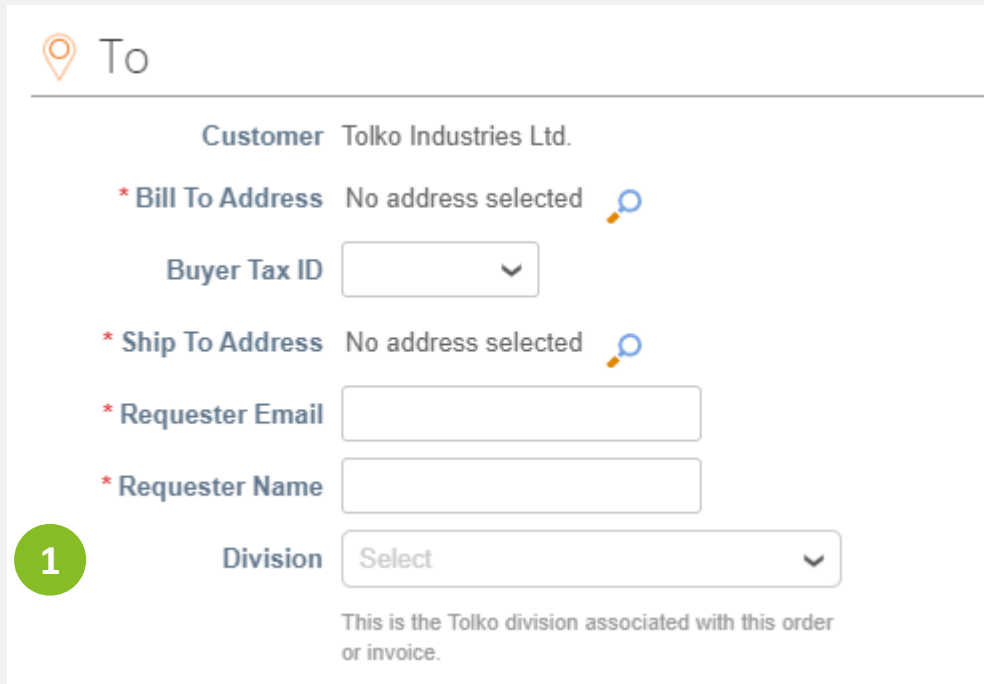
Below the Division field, there is a note: "This is the Tolko division associated with this order or invoice."


1 Enter the Requester's Email

2 Enter the Requester's Name

# Selecting the Division


When submitting a **non-backed invoice** (*an invoice that is not against a PO*), you will need to select the “Division” of where the goods and/or services were delivered.




 To

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Customer Tolko Industries Ltd.

\* Bill To Address No address selected 

Buyer Tax ID

\* Ship To Address No address selected 

\* Requester Email

\* Requester Name

**1** Division

This is the Tolko division associated with this order or invoice.

**1**

Click on the “Divisions” drop-down; select the Tolko plant that pertains to this invoice.

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# FAQs

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# Frequently Asked Questions and Answers

Some FAQs and their answers are listed in this slide. More FAQs can be found on the Coupa Compass Portal.

#	FAQ	Ans.
1	How do I contact Coupa for help using the CSP?	For Supplier support, please visit the <a href="#">Coupa Supplier Site</a> , and see the <a href="#">Supplier Help Center</a> and <a href="#">frequently asked questions</a> . For any technical or functional support-related questions not answered in the Supplier Help Center, Suppliers can chat with an agent 24x5 through the chat box on the Coupa Supplier Portal ( <a href="http://supplier.coupahost.com">supplier.coupahost.com</a> ), or email <a href="mailto:supplier@coupa.com">supplier@coupa.com</a> . Any questions regarding the Customer/Supplier relationship, processes, request/invoice/payment status, and so on, cannot be addressed by Coupa Support and must be directed to the Coupa Customer.
2	Why don't I receive the email invitation to join Coupa?	Check your spam/junk email folder. If you still cannot find the invitation, please contact Tolko to confirm that the invitation was sent ( <i>and to whom</i> ).
3	Is two-factor authentication mandatory?	Two-factor authentication (2FA) is mandatory with CSP payment accounts. 2FA is not mandatory with the other features of the CSP. This means that 2FA is not a requirement when working with Tolko, but we strongly recommend our suppliers use this functionality.
4	How do I add an employee?	On the main menu, click on the Admin tab. On the Users tab, click on the Invite User button. Provide the required information in the window that opens.
5	How do I update my banking information for direct deposits?	To update your banking information, we suggest first updating the Tolko form found under the Supplier Information Request section. Secondly, please email Tolko directly notifying us of the change.
6	How does a supplier request a change for PO?	Please contact someone at Tolko by emailing/calling and request for the change. Alternatively, you can leave a comment on the PO directly; the creator of the PO will receive a notification of your comment.
7	Do all invoices have to be logged through Coupa?	Yes. Suppliers are recommended to use the CSP but can use SAN approach as well if desired. SAN does not require you to have an active Coupa account, but it also limits your ability to track orders and invoices.
8	Why can't I edit, void, or delete an invoice?	Once an invoice has been submitted, it can't be changed in any way. This ensures invoice processing integrity. However, you still have options: <ol style="list-style-type: none"> <li>1. Ask your customer to reject or void the existing invoice. You can then create a new one.</li> <li>2. Create a new credit memo that credits the customer for the original value, and then create a new invoice.</li> </ol>
9	What types of files can I attach to an invoice?	Suppliers can attach additional information in the invoice leveraging two fields: "Image Scans" and "Attachments". For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Suppliers can also attach files, URLs and Text to an invoice. Adding an attachment is not mandatory.
10	What do I do if an invoice was rejected?	Please review the reason/comments for rejection and create a new invoice to replace the one that was rejected.



**Thank You!**

