

# New Supplier Process

## FAQs - Suppliers



August 2021

This list of common questions and answers aims to support new IRT suppliers with the onboarding process in Coupa Supplier Portal.

| Question  | Answer   |
|---|--|
| <b>What is Coupa Supplier Portal (CSP)?</b>   | The <u>CSP</u> is a free tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy.  |
| <b>Why do I have to complete a supplier information form in Coupa?</b>  | Completing the form ensures that IRT have all required information in Coupa to place purchase orders and pay invoices.   |
| <b>What is the compliance category that I have to select in the supplier information form?</b>                      | <p>The compliance category is based on the scope of work you will be providing to IRT as advised by the IRT requestor of your goods/services.</p> <p>This category drives the required compliance certificates you will need to provide to IRT to ensure compliance to aged care requirements. E.g. IRT Annual Supplier Declaration, insurances, police checks etc.</p>  |
| <b>What if the compliance category nominated in the form does not align with the goods/services I am providing?</b> | <p>Email <a href="mailto:supplermgmt@irt.org.au">supplermgmt@irt.org.au</a> detailing compliance category you believe is more appropriate so the form can be amended and reissued</p> <div data-bbox="491 1621 1224 1789"><p>The screenshot shows a form with two dropdown menus. The first is labeled 'Compliance Category' and has 'Food &amp; Beverage' selected. The second is labeled '* Confirm Compliance Category' and has 'Select' selected. Below the second dropdown, there is a note: 'Please select the same category noted in "Compliance Category" to drive the required compliance documents.'</p></div> |

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|---|---|
| <p><b>What if I am providing food or beverages to IRT?</b></p>  | <p>If you are providing food or beverages to IRT, please ensure to e-mail the relevant food related compliance documents to our Catering team to review. We cannot finalise on-boarding until our Catering team have approved this documentation.</p> <div data-bbox="491 293 1224 474" style="border: 1px solid #ccc; padding: 5px;"> <p>Compliance Category <input type="text" value="Food &amp; Beverage"/></p> <p>* Confirm Compliance Category <input type="text" value="Food &amp; Beverage"/> x v</p> <p><small>Please select the same category noted in "Compliance Category" to drive the required compliance documents.</small></p> <p><small>Examples include any food or beverages supplied to IRT customers, cafes, catering to IRT staff, or other non-perishable items</small></p> <p style="border: 1px solid red; padding: 2px;"><small>Please e-mail your food-related compliance documents to e-mail address catering@irt.org.au.</small></p> </div> |
| <p><b>What is the Annual Supplier Declaration?</b></p>  | <p>This document covers the minimum requirements for suppliers based on the goods/services they will be providing to IRT. It also contains a link to IRT's terms and conditions.</p>  |
| <p><b>Where can I get further information on how to use the CSP?</b></p>  | <p><a href="https://success.coupa.com/Suppliers">https://success.coupa.com/Suppliers</a></p> <p>or watch this brief introduction video of CSP</p> <p><a href="https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Additional_Resources/CSP_Videos#Intro">https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Additional_Resources/CSP_Videos#Intro</a></p>  |
| <p><b>Purchase Orders</b></p>   |   |
| <p><b>How do I create an invoice that isn't backed by a Purchase Order?</b></p>                                 | <p>The Coupa Supplier Portal will allow you to create a non-backed purchase order invoice. In your CSP, navigate to the invoice tab and use the Create Blank Invoice button.</p>  |
| <p><b>What is the purpose of Purchase Order acknowledgment by the supplier?</b></p>                             | <p>This feature notifies IRT buyers that you have received the Purchase Order. You can also use the comments section at the bottom of the PO to communicate with the IRT buyer.</p>   |
| <p><b>Will pre-existing PO's be loaded into Coupa?</b></p>  | <p>No, any pre-existing unfulfilled POs will not be transferred to Coupa, unless they are related to an IRT Home Care customer.</p> <p>If you are invoicing a pre-existing PO, you must still reference that PO number on your invoice.</p>   |
| <p><b>Can I filter the list of Purchase Orders to show only purchase orders that haven't been invoiced?</b></p> | <p>Yes, you can use the "Views" or "Filters" function to hide Purchase Orders which are fully invoiced and have a status "Closed". For further information on creating "Views" please refer to the guide available at <a href="#">Create Custom Views</a></p>   |
| <p><b>Invoicing</b></p>   |   |

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|--|--|
| <b>How do I invoice against a Purchase Order?</b>      | The Coupa Supplier Portal will allow you to create a purchase order invoice. In your CSP, navigate to the orders tab and use the gold coin icon to flip an invoice from the purchase order details.  |
| <b>How do I create an invoice?</b>                     | Click on the IRT tab and then select Purchase Orders (PO). Choose the PO you would like to invoice, and then click on the yellow pile of coins to create an invoice.   |
| <b>How do I know if an invoice has been submitted?</b> | When you sign in, go to your IRT tab and click the Invoices tab to see a searchable list of your submitted invoices.   |
| <b>Why can't I edit/void/delete an invoice?</b>        | You can delete any draft invoice you create. Once an invoice has been submitted, it can't be changed in any way. Ask IRT to reject or void the existing invoice. You can then create a new one.  |
| <b>How do I submit an invoice in Coupa?</b>            | You have two options to create and submit an invoice:<br>1. Use the "Create Invoice" button that comes on the received purchase order email.<br>2. Login to the CSP, find the IRT purchase order and select the yellow 'coins' icon to create the invoice.   |
| <b>How do I check if an invoice has been paid?</b>     | Payment information for your invoice will appear in your CSP account under the Invoice history. If registered, you will receive an email and notification from Coupa confirming approval for payment. For questions regarding payment information email <a href="mailto:accountspayable@irt.org.au">accountspayable@irt.org.au</a> . |