

Coupa Supplier Portal (CSP) Reference Guide

English

Legend

Colour Legend

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[Pending future review](#)

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1. Coupa and the Coupa Supplier Portal (CSP) Overview

- a) What is the **Coupa Supplier Portal** and why should I use it?

1a. Coupa Supplier Portal (CSP) Overview

What is the Coupa Supplier Portal and why should I use it?

What is Coupa?

Coupa is Xylem's new digital platform that simplifies and streamlines our procurement process – from sourcing to purchase orders to invoicing and payment.

What is the Coupa Supplier Portal?

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with their customers who use Coupa.

Why should I use it?

As the main interface between Xylem and our suppliers, the CSP offers extensive functionality across the procurement process, including;

- Receiving and managing purchase orders
- Submitting invoices electronically
- Tracking order and payment statuses in real time
- Sharing company details, including remittance and tax info

and much more...

2. Ways to join

- a) Joining via invitation email
- b) Joining via PO email or forwarded invitation
- c) Connecting via a self-originated connection request

2a. Ways to join

Joining via invitation email

Coupa offers multiple ways to connect to Xylem via the CSP. The following section provides an overview of the 4 main ways you can join.

1) Joining via a Xylem-originated invitation email

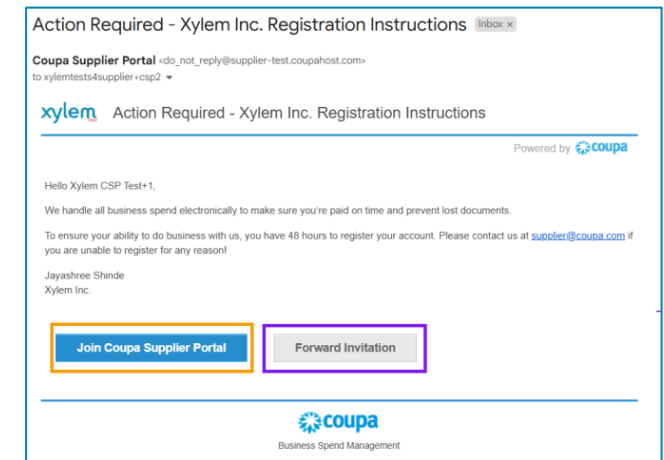
You will receive an email **from** Xylem, via the mailbox do_not_reply@supplier.coupahost.com, containing two options...

1) Join Coupa Supplier Portal

Click if you want to create your organisation's CSP account using the invitation's recipient email address.

2) Forward Invitation

Click if you want to change the email address you use to create your organisation's CSP account. **Note, you can only forward to email addresses with the same email domain.**



Please ensure you action the invitation email within 48 hours of receipt. If the invitation expires, please contact the **Supplier Enablement team** for further support.

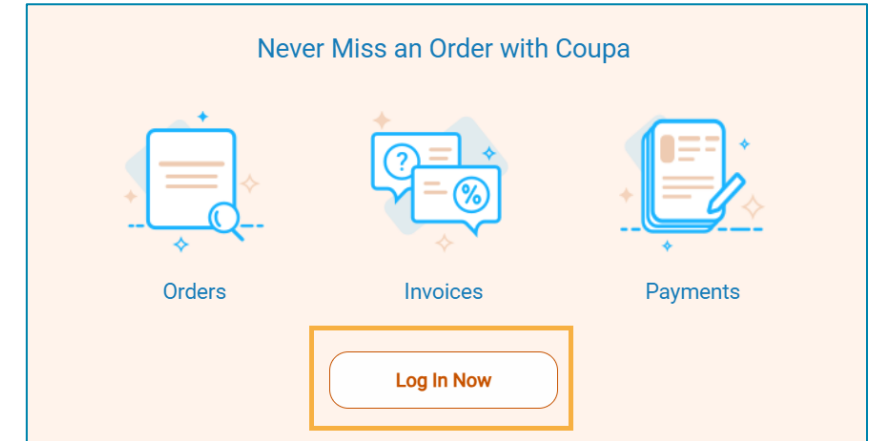
2b. Ways to join continued

Joining via a **Purchase Order email** or a **forwarded invitation**

2) Joining via Purchase Order or Supplier Information email

It is possible to join the CSP following the receipt of either a Coupa Purchase Order or Supplier Information Management request email.

Simply click on the **Log In Now** option (or **Join and Respond** – see [section 12a](#)) to commence the registration process.

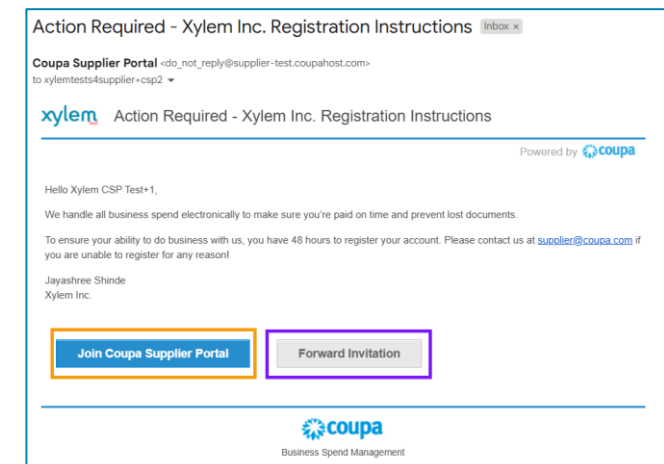


3) Joining via a forwarded invitation from a co-worker

You may receive an invitation to join because a colleague forwarded their own invitation.

Therefore, you will receive the same email invitation email as per [section 2a](#).

Once again, if you want to create your organisation's CSP account using the invitation's recipient email address, click **Join Coupa Supplier Portal**, or alternatively click **Forward Invitation** to forward to somebody else.



2c. Ways to join continued

Connecting via a self-originated **connection request**

4) Joining via a connection request

If you are already registered for, and transacting with other customers via, the CSP, you have the option to originate an invitation **to** Xylem. To originate a connection request;

- 1) Click **Setup**
- 2) Click **Connection Requests**
- 3) Search for '**Xylem Inc.**' in the customer directory
- 4) Enter the **Customer Contact**
- 5) Complete **reCAPTCHA** and agree to **T&Cs**
- 6) Click **Request**

You will be notified of acceptance via email.

Note, all connection requests are reviewed internally at Xylem prior to acceptance. Acceptance is therefore not guaranteed.

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' header is visible, along with user information 'XYLEM.CSP.TEST' and a 'NOTIFICATIONS' link. A navigation bar includes links for Invoices, Orders, Business Profile, Payments, Service Sheets, ASN, Sourcing, Forecasts, Catalogues, and a highlighted 'Setup' button. The left sidebar contains 'Admin' and 'Connection Requests' (highlighted), with sub-links for Learning Centre, Adding users to your account, and FAQs. The main content area prompts the user to 'Request a connection to your first customer now!'. A modal window titled 'Search for a customer' is open, featuring a search bar with 'Xylem Inc.' entered, a 'Customer Contact' field with 'CSP Test Contact', a reCAPTCHA verification, and a confirmation checkbox. The 'Request' button at the bottom right of the modal is highlighted with an orange box and a dashed arrow.

3. Creating your CSP account

- a) Completing the 'Create an account' form
- b) Complete email verification

3a. Creating your CSP account

Completing the ‘**Create an account**’ form

Having selected ‘**Join Coupa Supplier Portal**’ from the invitation email, you will be asked to ‘**Create an account**’. Please complete all mandatory fields, including your;

- a) Organisation’s legal **Business Name**
- b) **First Name/Last Name**
- c) **Password/Confirm password**
- d) **Country/Region** of your organisation’s legal entity that transacts with Xylem
- e) **Tax Registration** of your organisation’s legal entity that transacts with Xylem
- f) Please **accept** the necessary T&Cs
- g) Before clicking ‘**Create an account**’...

Note, the registration **Email** cannot be changed at this stage, so if an alternative address is required, please click ‘**Forward this to someone**’

Create an account

Xylem Inc. is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Xylem Inc. so you're ready to do business together.

a)

* Business Name

Xylem CSP Test+1

Your legal business name (or legal personal name if an individual)

b)

* First Name

Xylem

* Last Name

CSP Test+1

c)

* Password

.....

* Confirm Password

.....

Use at least 8 characters and include a number and a letter.

d)

* Country/Region

United States

e)

* Tax ID ⓘ

53-1234567

☐ I do not have a Tax ID

f)

☒ I accept the [Privacy Policy](#) and [Terms of Use](#)

g)

Create an account

Already have an account? [Log In](#)

[Forward this to someone](#)

3b. Your Coupa Verification Code

Complete email verification

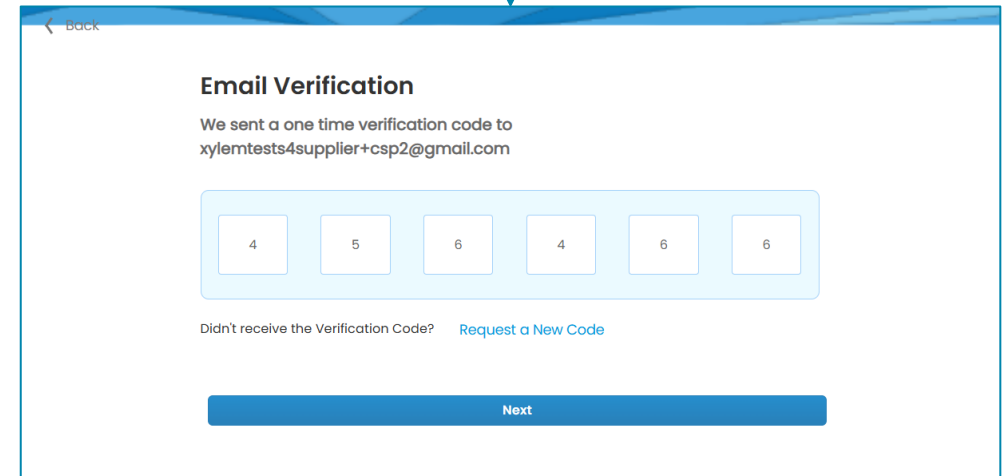
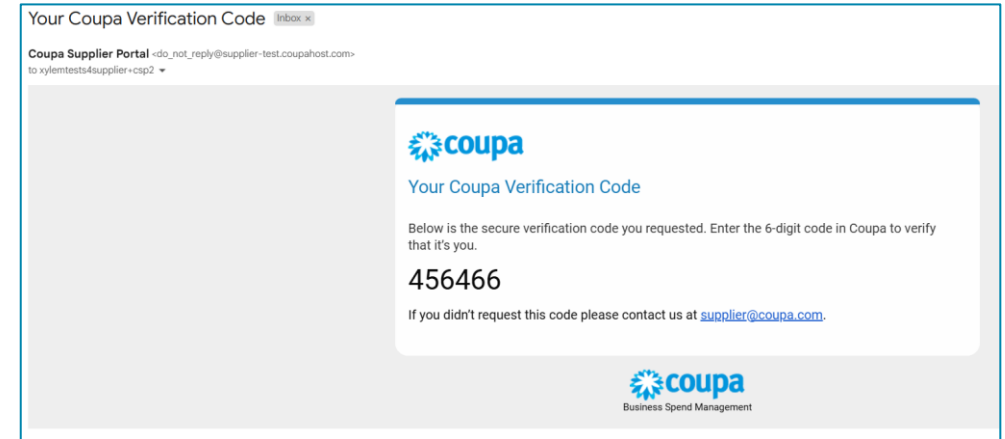
Before entry into the CSP is granted, you will be greeted with a 2-step email verification request.

Please check the inbox of the email address used during the previous step to locate **Your Coupa Verification Code**.

Please complete as appropriate, before clicking **Next**.

Please note...

- If your verification fails, please check the code and re-enter, or alternatively click '**Request a New Code**' to restart the verification process.
- If continue to experience issues, please contact the Supplier Enablement team for further support.



4. CSP Onboarding

- a) Completing the Account Details splash page
- b) Completing the Payment Information splash page
- c) Completing the Payment Information splash page cont.
- d) Completing the Subscriptions splash page

4a. Coupa Supplier Portal Onboarding

Completing the **Account Details** splash page

Upon entry into the CSP, you will be asked to complete your **Business Profile**. Please complete all mandatory (*) fields, including the;

- a) **Country/Region** (dropdown selection) of your organisation's legal entity address
- b) **Address Line 1** (and 2), **City**, **State** (dropdown selection) and **Postcode** of your organisation's legal entity address

Note, selection of a **Country/Region** will open additional fields depending on your selection. For assistance, please hover over the icon. In the US example shown, the only additional fields are;

- i. **Invoice-From code** – Please **ignore** this field, unless you are actively working on an EDI invoicing project with Xylem.
- ii. **Preferred Language** – Defaulted to English (US).

Once all necessary fields are populated, please click **Next**...

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

[Account Details](#) [Payment Information](#)

Primary Address

* Country/Region * Address Line 1 Address Line 2 (+)

* City * State * Postcode

Next

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

[Account Details](#) [Payment Information](#)

Primary Address ✓

a) * Country/Region b) * Address Line 1 Address Line 2 (+)

United States 301 Water Street SE

b) * City b) * State b) * Postcode

Washington Washington DC 20003

United States

i) Invoice-From Code ⓘ ii) Preferred Language

English (US)

Next

4b. Coupa Supplier Portal Onboarding

Completing the **Payment Information** splash page

You will then be asked to complete your **Payment Information**.

In total, **Coupa** supports three methods, including:

- a) Virtual Card (not yet supported by Xylem)
- b) Bank Transfer
- c) Check/Cheque (not supported by Xylem)

If you are registering using an email invitation originated from Xylem, the payment methods that Xylem support will be highlighted via a 'Customer Supported' callout shown towards the top-right hand corner of each method:

Customer Supported

You also have the option to skip the creation of any given payment method by clicking the 'Do not accept...' radio button located in the bottom left-hand corner of each method:

☒ Do not accept

Example of setting a) Virtual Card payment method...

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Primary Address saved successfully

Account Details Payment Information

a) Virtual Card ⓘ
Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ
Test 1 - Virtual Card

* Email Address
xylemtests4supplier+csp3@gmail.com

☐ Do not accept Virtual Card payments from this customer

Next

4c. Coupa Supplier Portal Onboarding

Completing the **Payment Information** splash page continued

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal.

Account Details Payment Information

c) Cheque
Please enter the following information to receive Cheque payments.

* Payment Method Name ⓘ
Test 1 - Check

Country/Region
United States

* Street 1
301 Water Street SE

Street 2
Unit, Building or Floor Number

+ Street 3

* City
Washington

* State
Washington DC - DC

* Postcode
20003

Remit-To Code ⓘ

☐ Do not accept Cheque payments from this customer

Next

Method not supported by Xylem

Examples of setting the following payment methods...

b) Bank Transfer

c) Cheque/Check*

*Note, Xylem does not support payment by Cheque/Check as a payment method.

Please remember;

- All mandatory fields are denoted by an asterisk (*).
- The available fields vary based on the Country/Region selected.

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal.

Account Details Payment Information

b) Payment Method (Bank Account)

Bank Transfer
Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ
Test 1 - Bank Transfer

* Bank Account Country/Region
United States

* State
Washington DC

* Bank Account Currency
USD

Beneficiary Name
Xylem CSP Test+1

Bank Name
Test Bank

Account Number ⓘ
1234567891011

Confirm Account Number
1234567891011

ACH Routing Number ⓘ
054001204

Wire Routing Number ⓘ

☐ My company expects to receive urgent/wire payments

Branch Code

Beneficiary Type
Business

Remittance Email ⓘ

Remit-To Code ⓘ

Supporting Documents ⓘ
Drop or Browse Files
Browse

Test Banking Supporting Document.pdf

☐ Do not accept Bank Transfer payments from Xylem TestS4 Inc.

Save and Next

4d. Coupa Supplier Portal Onboarding

Completing the **Subscriptions** splash page

To complete the Onboarding process, you may be asked to select a CSP 'Subscription'.

Xylem's recommendation is to proceed with the 'Registered' option – which is free.

This option provides full functionality to transact with Xylem via the CSP, and has no cost associated for you - the supplier.

You may choose to select either of the Premium (paid) options should you wish, as these also provide full functionality to transact with Xylem via the CSP.

Subscriptions

Xylem Recommends

Registered

Easily do business with customers who use Coupa

Free

Registered user includes:

- Business Profile
- Orders
- E-Invoices
- Catalogues
- Payments
- Sourcing Events

[Continue](#)

Coupa Verified

Amplify your trusted brand across Coupa's community of buyers

\$549 / year

Everything in 'Registered' plus:

- Verified Badge
- Priority Search Rank

[Purchase Verified](#)

Coupa Advanced

Optimise your cash flow and increase productivity throughout your day

\$4,800 / year

Everything in 'Registered' plus:

- Automated invoice reminders and reporting
- A seamless integration with your account system

[Purchase Advanced](#)

[Cancel](#)

5. Managing your account

- a) Navigating the Home Page
- b) Changing the Language
- c) Account Settings
- d) Notification Preferences
- e) Notification Preferences continued
- f) Important Info re: 'New PO Received' Notification
- g) Multi Factor Authentication

5a. Managing your account

Navigating the Home Page

Upon entry to the CSP, you will be greeted with the home screen, comprising of;

- a) Home Icon – Click to return home
- b) Account/Notification – See [section 5c](#)
- c) Notifications – See [section 5d](#)
- d) Help – Official Coupa support
- e) Sub menus – See [section 7](#) onwards
- f) Coupa Subscriptions – You can ignore
- g) Profile Overview – Visible to customers
- h) Recent Activity
- i) Admin overview - See [section 6](#)

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal' text. On the right, there are links for 'XYLEM', 'NOTIFICATIONS', and 'HELP'. Below the header is a navigation bar with icons and labels for 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Setup', and 'More...'. The main content area features a large teal banner with the text 'Verify Your Account And Get Noticed' and a 'Get Verified' button. Below this is a section for 'Xylem CSP Test+1' with a 'Get Verified' button and a profile update notice. The 'Recent Activity' section shows 'No activity found for Xylem Inc.'. The 'Announcements' section shows 'No Announcements'. At the bottom, there is a table with four columns: 'Multi-Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection).

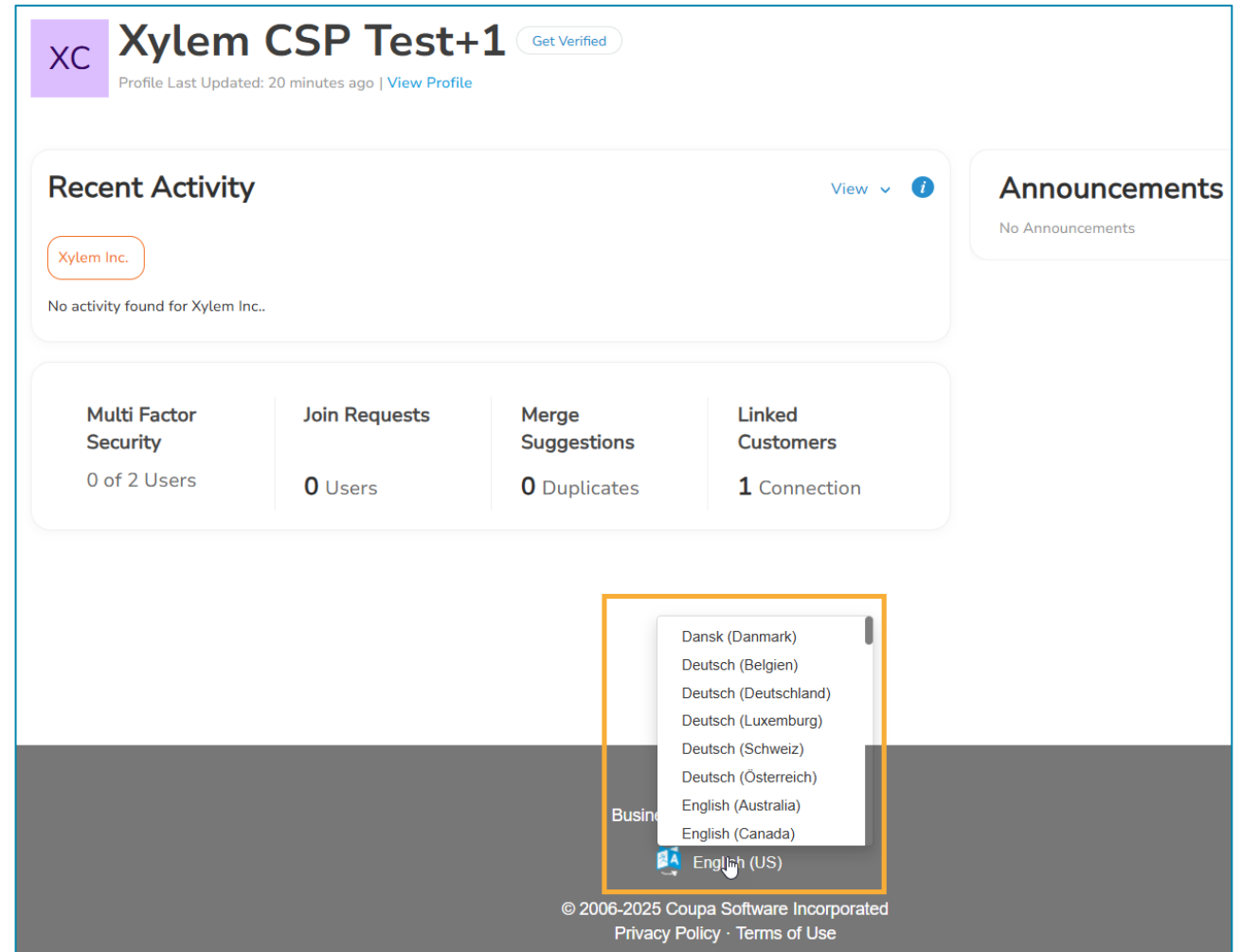
Multi-Factor Security	Join Requests	Merge Suggestions	Linked Customers
0 of 1 Users	0 Users	0 Duplicates	1 Connection

5b. Managing your account

Changing the Language

If necessary, you can change the **language** displayed in the CSP, by scrolling to the bottom of the homepage and hovering over the language icon, shown beside as ‘**English (US)**’.

You can then proceed to select a **new language** from the dropdown list that displays.



5c. Managing your account

Account Settings

Hovering over your profile name in the top right-hand corner displays your **Account Settings** and **Notification Preferences**, along with the option to **Log Out**.

Selecting **Account Settings** allows you to adjust details such as your **First/Last Name** and contact **Phone Number**.

Please remember to **Save** any changes made.

You can also access the **Change Password** function, which, once selected, will open a new window/tab on your browser.

Note, following a password change, your new window/tab will return you to the CSP home screen. Therefore, we recommend closing the previous browser/tab before continuing in the new.

The screenshot displays the 'My Account' settings page in the Coupa Supplier Portal. The top navigation bar includes the Coupa logo, 'supplier portal', and links for Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, and Sourcing. A user profile dropdown is open in the top right, showing 'XYLEM', 'NOTIFICATIONS 1', 'HELP', and a 'More...' link. The dropdown menu lists 'Account Settings', 'Notification Preferences', and 'Log Out'. The 'Settings' sidebar on the left is highlighted with an orange box. The main content area is titled 'My Account Settings' and contains a 'User Details' section. This section includes fields for 'First Name' (Xylem), 'Last Name' (CSP Test+1), 'Email' (xylemtests4supplier+csp3@gmail.com), and 'Purpose' (Accounting, Diversity, Legal, Procurement, Risk, Se). Below these is a 'Phone Number' section with a 'Country/Region' dropdown, 'Code', 'Phone Number', and 'Extension' fields. A 'Save' button is located at the bottom right of the 'Phone Number' section. A 'Change Password' link is at the bottom left. Orange boxes highlight the 'Settings' sidebar item, the 'User Details' section, the 'Phone Number' section, the 'Save' button, and the 'Change Password' link. Dashed orange arrows point from the 'Account Settings' menu item to the 'Settings' sidebar item, and from the 'Phone Number' section to the 'Save' button.

5d. Managing your account

Notification Preferences

Selecting **Notification Preferences** allows you to adjust which CSP notifications you receive (*New Sourcing Event, New Purchase Order, An Invoice is Paid etc.*), along with by what method (*CSP only, Email, SMS etc.*).

You can adjust notifications by scrolling through each sub section (*Account access, Announcements, Business Performance etc.*) and selecting whether you wish to receive notifications via;

- 1) Online – Notification visible in the CSP ‘Notifications’ tab.
- 2) Email – Notification sent to your registered email address
- 3) SMS – Notification message sent to your registered mobile

The screenshot shows the 'My Account' page in the Coupa Supplier Portal. The 'Notification Preferences' section is highlighted in the sidebar. The main content area shows the 'Notification Preferences' form, which includes a table for selecting notification methods (Online, Email, SMS) for various account access, announcements, business performance, catalogues, and community events. The 'XYLEM' logo is visible in the top right corner, and the 'NOTIFICATIONS' tab is active.

Section	Event	Online	Email	SMS
Account access	Request to join	☒	☒	☐
	Merge Request	☐	☒	☐
Announcements	New Customer Announcement	☒	☐	☐
	Business Performance Role Granted	☒	☐	☐
Catalogues	New comment received	☒	☒	☐
	Catalogue approved	☐	☐	☐
	Catalogue rejected	☐	☐	☐
	Catalogue about to expire	☐	☐	☐
Community	Community Role Given to User	☒	☒	☐

5e. Managing your account

Notification Preferences continued

There are hundreds of notifications available, with the majority enabled by default. **At a minimum**, we recommend keeping the following checked to ensure you can easily transact with Xylem via the CSP;

- a) Merge Request
- b) Invoice paid
- c) An invoice processing has failed
- d) Invoice approved
- e) New PO received
- f) A new participation request is received

Please note, notifications are not customer specific. Therefore, changes will impact the notifications you receive for **both** Xylem **and** other customers you transact with via the CSP.

Account access			
	☒ Online	☐ Email	☐ SMS
a)	Merge Request	☒ Online	☒ Email ☐ SMS
Invoices			
	An automated invoice payment reminder is sent	☐ Online	☐ Email ☐ SMS
b)	Invoice paid	☒ Online	☒ Email ☐ SMS
c)	An invoice processing has failed	☒ Online	☒ Email ☐ SMS
d)	Invoice approved	☒ Online	☒ Email ☐ SMS
Orders			
	An order is cancelled	☐ Online	☐ Email ☐ SMS
e)	New PO received	☒ Online	☒ Email ☐ SMS
	New comment received	☐ Online	☐ Email ☐ SMS
Sourcing Event			
f)	A new participation request is received	☒ Online	☐ Email

5f. Managing your account

Important Information re: 'New PO Received' Notification

Remember, you must **Save** any changes, by scrolling to the bottom of the Notification Preferences page and clicking **Save**.

Important Information re: 'New PO Received' Notification

Please also note, keeping the 'New PO Received' -> 'Email' notification checked **may** result in you receiving an email notification **twice** regarding the same Xylem Purchase Order.

This is because Xylem chooses to **also** send Purchase Orders via Email from **their instance** of Coupa.

Therefore, as a supplier to Xylem, you may receive an email notification that Xylem has created a new PO from **both**:

- i. Xylem's instance of Coupa
- ii. Your instance of the CSP

If you require further assistance on this topic, please contact the [Supplier Enablement team](#).

A new participation request is received	☒ Online	☐ Email
Sourcing Event ended	☒ Online	☐ Email
Sourcing Event has been withdrawn	☒ Online	☐ Email

Supplier Merges

Merge Suggestions	☒ Online	☐ Email
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Terms of Use

Terms of Use	☒ Online	☒ Email	☐ SMS
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Users

Add Users to account	☒ Online	☒ Email	☐ SMS
A new customer connection created	☒ Online	☒ Email	☐ SMS

Service Sheets

A Service Sheet is rejected	☒ Online	☒ Email	☐ SMS
A Service Sheet is approved	☒ Online	☒ Email	☐ SMS

5g. Managing your account

Multi Factor Authentication

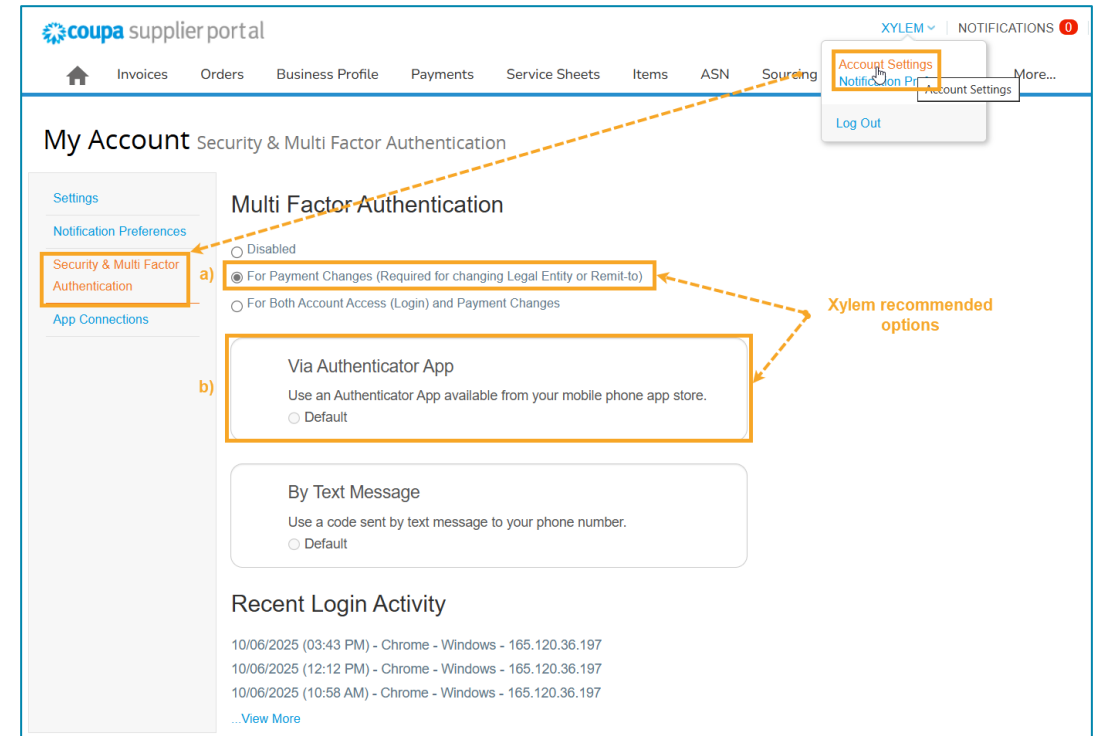
Selecting **Security & Multi Factor Authentication (MFA)** allows you to chose both:

- a) When MFA is required
- b) The method of MFA you wish to use

At a minimum, Xylem recommends enabling MFA ‘**For Payment Changes**’ ‘**Via Authenticator App**’.

Please note:

- This recommendation requires the use of third-party apps such as the **Google Authenticator** app, or Apple’s **Authenticator App**, available via their respective app stores.
- **Security & Multi Factor Authentication** page, Coupa will prompt you to setup MFA Via Authenticator App, which you can bypass by selecting **Cancel**.



6. Admin Users

- a) Users Menu
- b) Inviting and Editing Users
- c) Merge Requests
- d) Managing Legal Entities
- e) Managing Payment Methods

6a. Admin Users

Users Menu

If you joined the CSP via email invitation, by default you will be the **Admin** user for your organisation, giving you full access to all CSP functions, including user (colleague) administration.

To access, click **Setup**, **Admin** and then **Users**. From here, you can:

- a) **Invite User** – Generate a new CSP invitation to allow colleagues to join your organisation’s CSP instance.
- b) **Edit** – The CSP **Permissions** and **Customers** each user can access/transact with.

Note: Non-admin users can still view the Users tab of the Admin page and invite users, but they cannot edit existing users.

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'coupa supplier portal', 'XYLEM', 'NOTIFICATIONS', and 'HELP'. Below this, a secondary navigation bar contains links for 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Setup', and 'More...'. The 'Setup' button is highlighted with an orange box. On the left sidebar, under the 'Admin' section, the 'Users' link is highlighted with an orange box. The main content area is titled 'Admin Users' and features a table of users. The table has columns: 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', 'Purpose', and 'Actions'. The first row shows a user named 'Xylem CSP Test+1' with email 'xylemtests4supplier+bsp3@gmail.com' and status 'Active'. The 'Permissions' column lists various system functions like 'ASNs', 'Admin', 'Business Performance', etc. The 'Customer Access' column shows 'Xylem Inc.'. The 'Purpose' column lists 'Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing'. The 'Actions' column for this user has an 'Edit' button highlighted with an orange box. A dashed orange arrow points from the 'Setup' button in the top navigation bar to the 'Admin' button in the left sidebar, and another dashed orange arrow points from the 'Admin' button to the 'Users' button. A label 'a)' points to the 'Invite User' button in the top right of the main content area, and a label 'b)' points to the 'Edit' button in the Actions column.

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Xylem CSP Test+1	xylemtests4supplier+bsp3@gmail.com	Active	ASNs Admin Business Performance Catalogues Community Early Payments Forecast Planner Hidden, Private and Public Inventory Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service Sheets Sourcing	Xylem Inc.	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	b) Edit

6b. Admin Users

Inviting and Editing Users

The options available via both the **Invite User** and **Edit** user functions are similar, given both allow the **Admin user** to adjust the CSP **Permissions** and **Customers** available to the user being invited/edited.

The key differences are as follows;

- a) **Invite User** – Requires the admin user to add the First Name, Last Name and Email of the user they wish to invite.
- b) **Edit User** – Does not allow the admin user to change the Email of the user being edited but does allow deactivation via the **Deactivate User** button.

Please remember to **Save** any changes made.

Invite User

User Information

First Name
Last Name
*Email

Phone Number

Country/Region
Area/City
Local
Extension

Permissions

☒ All
☒ Admin
☒ Orders
☐ All
☐ Restricted Access to Orders
☒ Invoices
☒ Catalogues
☒ Profiles
☒ ASNs
☒ Service Sheets
☐ All
☐ Restricted Access to Service Sheets
☒ Payments
☒ Order Changes
☒ Early Payments
☒ Business Performance
☒ Sourcing
☐ Private and Public
☐ Hidden, Private and Public
☒ Community
☒ Order Line Confirmation
☒ Forecast Planner
☒ Workers
☐ View
☐ Manage
☒ Worker Assignments
☐ View
☐ Manage
☒ Inventory

Customers

☒ All
☒ Xylem Inc.
☐ The Shelby Group

Cancel Send Invitation

Edit user access for Xylem CSP Test+1

User Information

*First Name
*Last Name
*Email

Phone Number

Country/Region
Area/City
Local
Extension

Purpose

Accounting X Diversity X Legal X
Procurement X Risk X Sales X
Sourcing X

Permissions

☐ All
☐ Admin
☒ Orders
☐ All
☐ Restricted Access to Orders
☒ Invoices
☒ Catalogues
☒ Profiles
☒ ASNs
☒ Service Sheets
☐ All
☐ Restricted Access to Service Sheets
☒ Payments
☒ Order Changes
☒ Early Payments
☒ Business Performance
☒ Sourcing
☐ Private and Public
☐ Hidden, Private and Public
☒ Community
☒ Order Line Confirmation
☒ Forecast Planner
☐ Workers
☐ View
☐ Manage
☐ Worker Assignments
☐ View
☐ Manage
☒ Inventory

Customers

☒ All
☒ Xylem Inc.
☐ The Shelby Group

Cancel Deactivate User Save

6c. Admin Users

Merge Requests

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

Therefore, the need may arise to merge these accounts, which can be actioned via the **Merge Requests** menu.

Here, an **Admin user** can **Initiate** a new **Merge Request** or respond to any **Open merge requests** you have received.

Note: the suggestions to merge accounts are based on email domain, and account merges **cannot be undone**.

For assistance, please either:

- Contact the **Supplier Enablement team**
- Follow Coupa's official guidance, found here: **Compass**

The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes links for Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, and a Setup button. The 'Admin' tab is selected, leading to the 'Connection Requests' section. On the left, a sidebar menu lists various admin functions, with 'Merge Requests' highlighted. The main content area is titled 'Admin Merge Requests' and contains two sections: 'Initiate Merge Request' and 'Open merge requests'. The 'Initiate Merge Request' section has a text input field with 'coupa@coupamail.edu', a reCAPTCHA verification area, and a warning message about the consequences of merging accounts. A 'Request Merge' button is at the bottom of this section. The 'Open merge requests' section shows a message: 'All clear! No open merge requests.'

6d. Admin Users

Managing Legal Entities

As an **Admin user**, you can also **Create** and **edit** your organisation's legal entity/entities, accessible via the **Business Profile** and **Legal Entities** menus.

From here, you can either;

- a) **Create** a new legal entity for your organisation
- b) **Edit** certain details of any existing Legal Entity Name.

Please note, you can only **Edit** the following fields of an existing Legal Entity;

- i. Legal Entity Name
- ii. Invoice from Address (excluding Country/Region)
- iii. Ship-From Address
- iv. Delete Legal Entity

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal' and a user profile 'XYLEM' with a notification badge showing '2'. Below this is a secondary navigation bar with tabs: Invoices, Orders, Business Profile (highlighted), Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More... A third navigation bar contains: Business Profile, Profile Submissions, Legal Entities (highlighted), Payment Methods, Information Requests, Performance Evaluation, and Subscriptions. The main content area is titled 'Legal Entities' and features a 'Create' button (highlighted) and a search bar. Below is a table with the following columns: Legal Entity Name, Invoice From Address, Tax ID, Linked Payment Method, Payment Information, and Customers. The table contains three rows of data. The first row is highlighted with a blue box, and a hand icon points to the edit icon in the 'Legal Entity Name' column. The second row shows a virtual card, and the third row shows a bank account. At the bottom, there is a pagination bar showing 'Per page 5 | 10 | 20'.

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
Xylem CSP Te...	301 Water Street SE, Washington, Washington DC, 20003, United States	US:53- 1234567	Cheque	301 Water Street SE, Washington, Washington DC,...	Xylem Inc.
			Virtual Card	xyl*****@gma*****	None
			Bank Account	Test Bank *****1011	Xylem Inc.

6e. Admin Users

Managing Payment Methods

You can also **Add** and **edit** your organisation's Payment Methods, accessible via the **Business Profile** and **Payment Methods** menus.

From here, you can either;

- a) **Add Payment Method** to add a new method
- b) **Edit** existing methods
- c) **Share a Payment Method** with a customer
- d) **Manage Linked Customers** of an existing method
- e) **Deactivate** an existing method

Please, ensure you have configured appropriate **Multi Factor Authentication** to prevent unauthorised access/changes to your payment methods. See [section 5g](#) for more details.

coupa supplier portal

XYLEM | NOTIFICATIONS 5 | HELP

Business Profile | Profile Submissions | Legal Entities | **Payment Methods** | Information Requests | Performance Evaluation | Subscriptions

Payment Methods

a) Add Payment Method

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Test 1 - Bank Transfer	United States	USD	Xylem CSP Test+1	Xylem Inc.	Active	b) c) d) e)
Virtual Card	Test 1 - Virtual Card			Xylem CSP Test+1		Active	b) c) d) e)
Check	301 Water Street SE, Washington, Washington DC, 20003, United States			Xylem CSP Test+1	Xylem Inc.	Active	b) c) d) e)

Per page 5 | 10 | 20

7. Purchase Orders

- a) PO Emails – Email 1
- b) PO Emails – Email 2
- c) PO Types – Direct vs Indirect
- d) PO – Retrieval
- e) PO – Acknowledge and PO Types
- f) PO – Confirmations
- g) PO Confirmations - Accepting and Submitting
- h) PO Confirmations - Rejecting and Submitting
- i) PO Confirmations - Editing and Submitting
- j) PO Confirmations – Delivery Schedule
- k) PO Confirmations – Confirmation Status
- l) PO Confirmations – PO Revisions
- m) PO Confirmations – Flowchart Illustration

7a. Purchase Orders

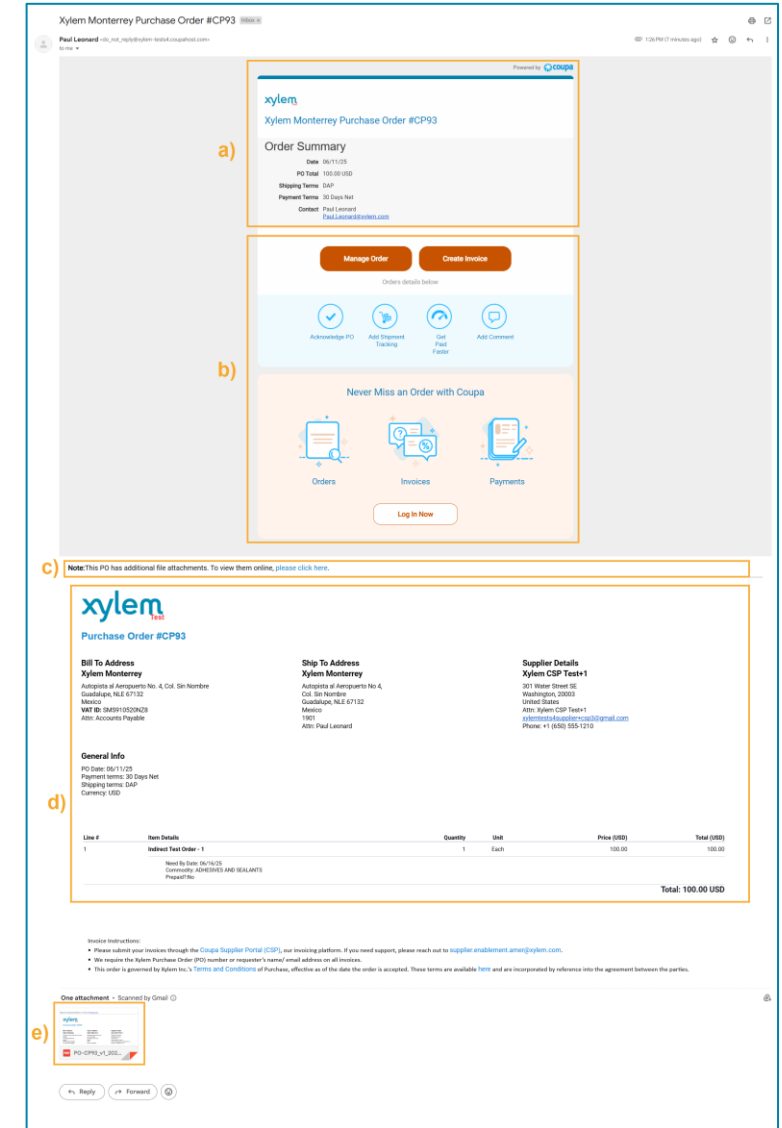
PO Emails – Email 1

As a CSP user, when Xylem raise a new **Purchase Order**, you will be notified **twice** via email - assuming you follow the advice of [section 5e](#).

The 1st email will be the **Purchase Order** itself, which is generated by Xylem's instance of Coupa, and looks as per right.

This email will comprise of the:

- a) Order Summary - Including date, PO total, terms and contact
- b) Actionable Notifications – Including acknowledgement and shipping details
- c) Attachments – Any attachments (other than the PDF PO) can be found here
- d) Purchase Order detail - Including Bill To, Ship To and Line-Item details
- e) PDF copy of the Purchase Order



7b. Purchase Orders

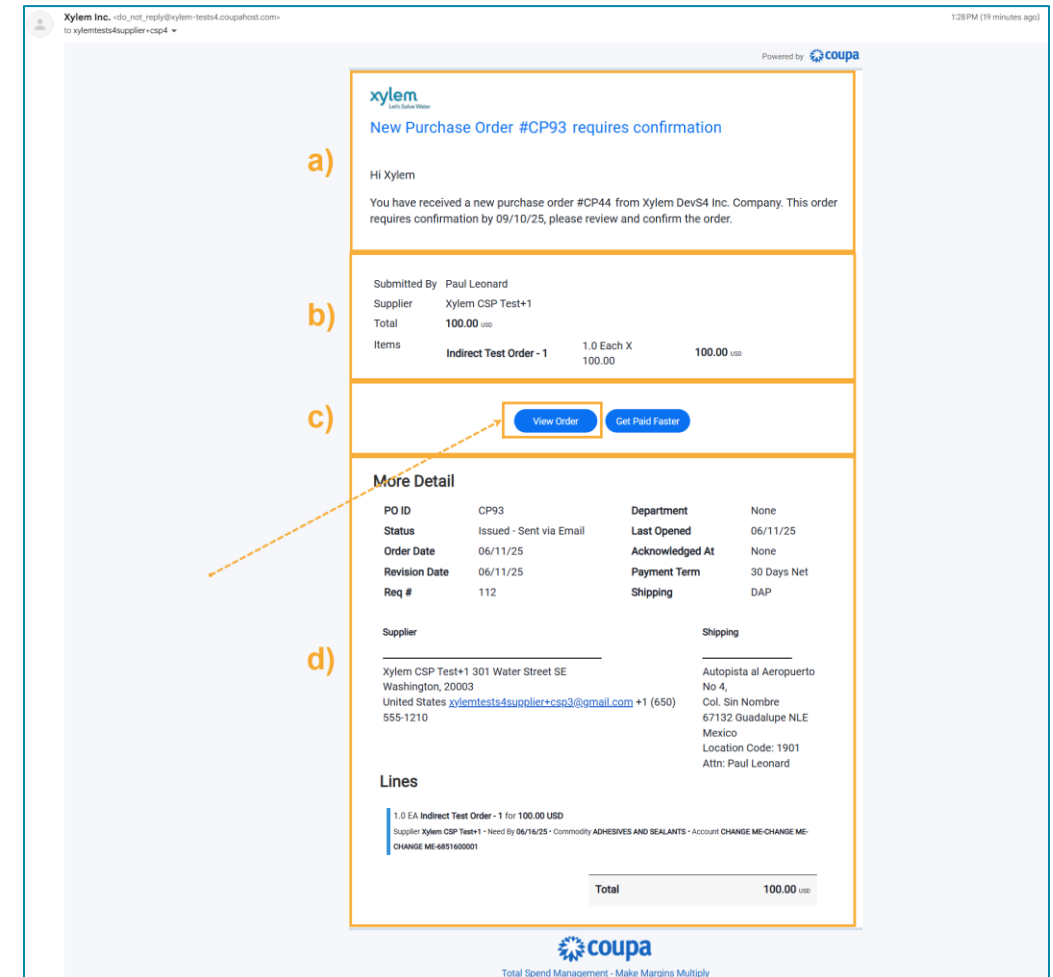
PO Emails – Email 2

The 2nd email will be either titled '**New Purchase Order #XXX requires confirmation**' OR a *****Copy for Reference***** email, depending upon the order type, which is generated by your instance of the CSP, and looks as per the screenshot right.

This email will comprise of the:

- a) CSP Verbatim – Advising the PO is available in the CSP
- b) Order Summary - Including Submitted by, Supplier, Total and Items
- c) CSP Links – To **View Order** and **Discounts*** (**Get Paid Faster**)
- d) Purchase Order detail - Including header and line-item details

Xylem recommends you click the **View Order** link of the 2nd email. Doing so ensures you are ready to Acknowledge the PO, as covered in [section 7e](#), and Confirm, as covered in [section 7f](#).



7c. Purchase Orders

PO Types – Direct vs Indirect

Xylem transmits all Purchase Orders through Coupa, including Direct and Indirect POs. The differences between the two are summarised as follows;

Type	Order Flow	PO Taxonomy	where X = next sequential number available.
Direct	SAP->Coupa-> Supplier	4XXXXXXXXX	
Indirect	Coupa->Supplier	CPXXXXXXXX	

The different PO taxonomies will be visible on the **Orders** menu of the CSP as below...

Purchase Orders

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to

View All

Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP1457	06/11/25	Issued	None	1 EA of Indirect Test Order - Adapters	No	100.00 USD		
4000001643	06/10/25	Issued	None	5 EA of ADAPTER, MJICX0.375" MPT #8	No	5.00 USD		

Please note, all Purchase Orders, regardless of type, should be actioned equally (acknowledged, delivered and invoiced). There are no exceptions based on order type.

7d. Purchase Orders

PO – Retrieval

Once **View Order** is clicked, you will be asked to login to the CSP. Once logged in, the Purchase Order will be displayed.

Please note, it is also possible to access the PO via the **Orders** and **Orders** menu. If you support multiple customers via the CSP, please ensure Xylem are selected (see * beside).

The CSP PO view comprises the following sections;

- a) PO Confirmation – Required on quantity-based POs **only**, see [section 7e](#).
- b) General Info – Header details including **Requester**, **Payment Term** and **Acknowledged** check-box
- c) Shipping Details – Including **Ship-To Address** and **Terms**
- d) Lines – Including **Item**, **Qty**, **Price**, **Need By** date, **Supplier Part Number**, **Attachments** etc.
- e) Summary/Actions – Including **Create Invoice**, **Save** and **Print View**
- f) Comments – Including **Comment** box and **Add Comment** function

The screenshot displays the Coupa Supplier Portal interface for Purchase Order #CP93. The top navigation bar includes links for Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More. A customer selection dropdown is set to 'Xylem DevS4 Inc.'. The main content area is divided into several sections:

- a) Your Action Required on Confirmation:** A blue banner indicating a response is due in 47 hours.
- b) General Info:** A section containing order details such as Status (Issued - Pending Manual), Confirmation Status (Pending Confirmation), Order Date (09/25/25), Revision Date (09/25/25), Requester (Paul Leonard), Email (Paul.Leonard@xylem.com), Payment Term (15 Days Net), Storage Location (None), Place of Delivery (None), SAP Version Number (None), and an Acknowledged checkbox.
- c) Shipping:** A section containing Ship-To Address (Autopista al Aeropuerto No 4, Col. Sin Nombre, 67132 Guadalupe NLE, Mexico, Location Code: 1901, Attn: Paul Leonard), Terms (CPT), and a Shipment Tracking section.
- d) Lines:** A table listing line items with columns for Type, Item, Qty, Unit, Price, Total, and Invoiced. The first line item is 'Indirect Test Order - 1' with a quantity of 1 and a price of 100.00.
- e) Summary/Actions:** A section showing the Total USD (100.00) and buttons for Create Invoice, Save, View/Edit Confirmation, and Print View.
- f) Comments:** A section with a text input field for entering a comment and an Add Comment button.

7e. Purchase Orders

PO – Acknowledge and PO Types

Please acknowledge you have received the PO, by checking the **Acknowledged** box (see right) and click **Save**.

The options to **confirm** you can fulfil the PO as displayed vary depending on the type* of PO you have received.

For **Quantity*** based POs:

- You **must** confirm the order within the timeframe stated, by clicking the “**Take me there >>**” button located at the top right of the CSP PO view.

For **Amount*** based POs:

- You **will not** be required to confirm the order via the CSP. Instead, assuming you can fulfil the order as displayed, please check the **Acknowledged** box **only**.
- If you **cannot** agree to fulfil the PO as displayed, Email the requester (outside of the CSP), explaining why you cannot confirm the PO as displayed.
 - i. The requestor will then either cancel the PO, or process a PO revision with the new **Item, Qty, Price, Need By** date etc.

Purchase Order #CP93

General Info

Status Issued - Sent via Email

Order Date 06/11/25

Revision Date 06/11/25

Requester Paul Leonard

Email Paul.Leonard@xylem.com

Payment Term 30 Days Net [Get Paid Faster](#)

Attachments None

☒ Acknowledged

Lines

Select Customer Xylem DevS4 Inc.

ours

[Take me there >>](#)

Shipping

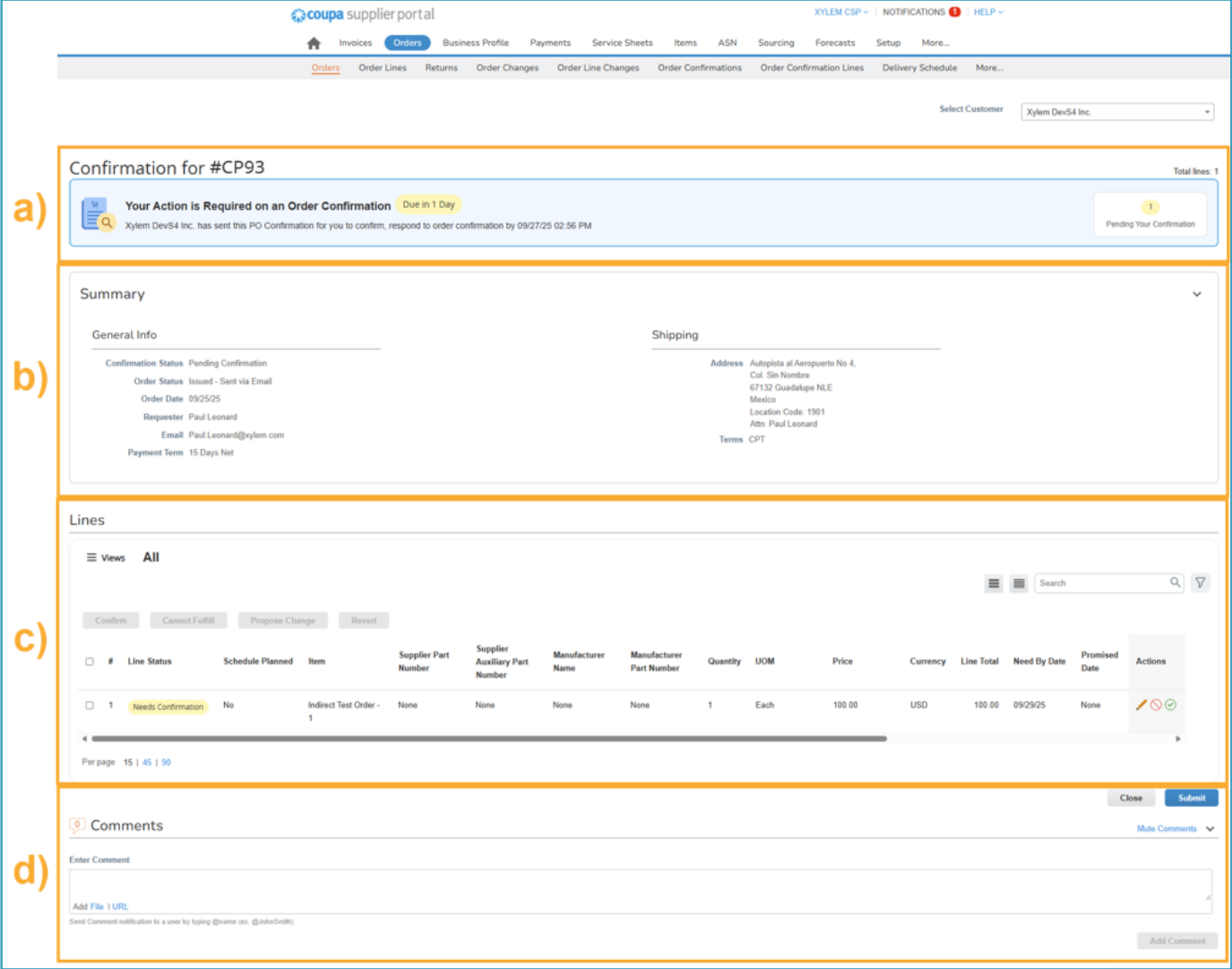
Ship-To Address Autopista al Aeropuerto No 4,
Col. Sin Nombre
67132 Guadalupe NLE
Mexico
Location Code: 1901
Attn: Paul Leonard

7f. Purchase Orders

PO - Confirmations

The **PO Confirmation** screen is split into 4 sections, consisting of the;

- a) **Confirmation Header** – Stating the confirmation **Status** and required and the time remaining to complete any actions.
- b) **Summary** – Including the **General Info** and **Shipping** sub sections.
- c) **Lines** – Displaying all lines pending confirmation. The available actions include **Accept** , **Reject**  or **Edit**  the order details as displayed on the PO.
- d) **Comments** – Where you can provide feedback to the requester relating to the order.



The screenshot shows the Coupa Supplier Portal interface for a Purchase Order Confirmation. The top navigation bar includes links for Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More. The main header shows the user is logged in as Xylem CSP, with notifications and a help link. The page title is "Confirmation for #CP93".

a) Confirmation Header: A blue banner at the top states "Your Action is Required on an Order Confirmation" with a "Due in 1 Day" timer. It also shows a "Pending Your Confirmation" button.

b) Summary: This section is divided into two sub-sections: "General Info" and "Shipping".

General Info		Shipping	
Confirmation Status	Pending Confirmation	Address	Autopista al Aeropuerto No 4,
Order Status	Issued - Sent via Email	Col. Sta. Nemesia	67132 Guadalupe NLE
Order Date	09/25/25	Mexico	Location Code: 1901
Requester	Paul Leonard	Attn: Paul Leonard	
Email	Paul.Leonard@xylem.com	Terms	CPT
Payment Terms	15 Days Net		

c) Lines: This section displays a table of order lines pending confirmation. The table has columns for Line Status, Schedule Planned, Item, Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, Manufacturer Part Number, Quantity, UOM, Price, Currency, Line Total, Need By Date, Promised Date, and Actions.

Line Status	Schedule Planned	Item	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Quantity	UOM	Price	Currency	Line Total	Need By Date	Promised Date	Actions
Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	1	Each	100.00	USD	100.00	09/29/25	None	  

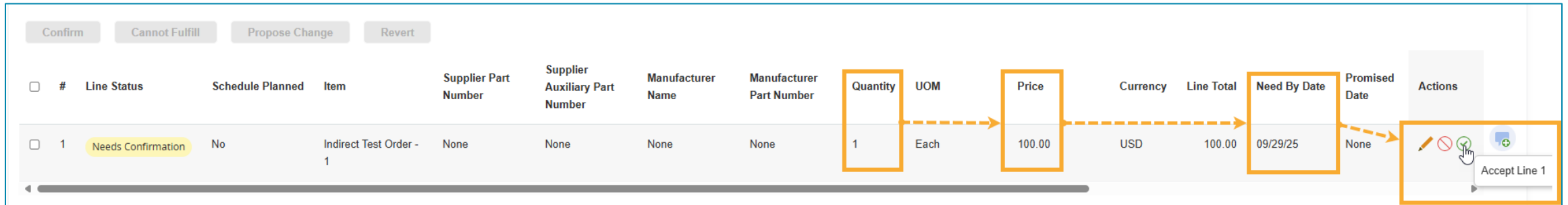
d) Comments: This section allows users to provide feedback. It includes a text area for "Enter Comment", a link to "Add File | URL", and a button to "Add Comment".

7g. Purchase Orders

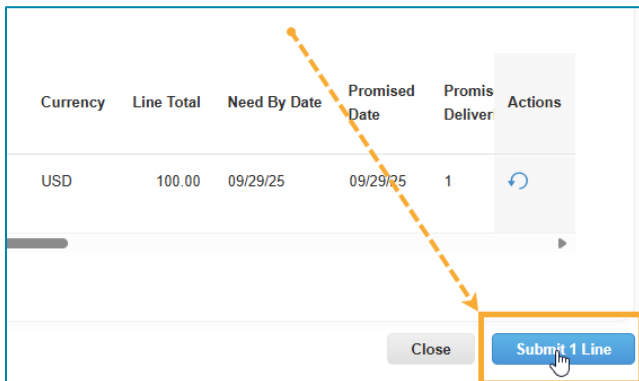
PO Confirmations - Accepting and Submitting

If you **can** fulfil the order line as per the required **Quantity**, **Price** and **Need By Date**, please proceed to click **Accept** 

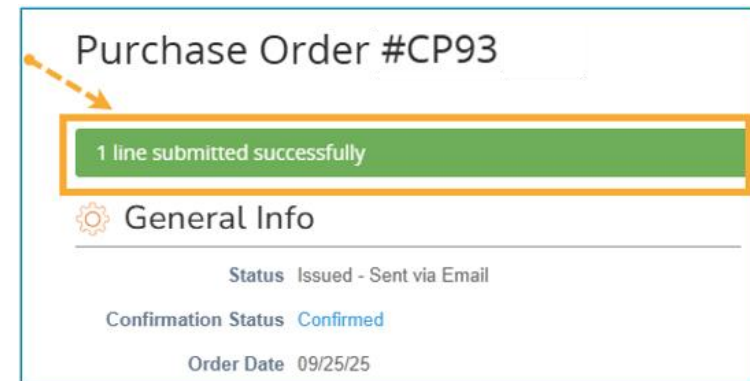
Please note, you are required to confirm **each line** contained on the Purchase Order.



Once all lines are actioned, please click **Submit x Line(s)**, where x = the number of PO lines being confirmed.



If successful, a green banner will display confirming the submission, and the Confirmation **Status** will change from **Pending Confirmation** to **Confirmed**.



7h. Purchase Orders

PO Confirmations - Rejecting and Submitting

If you **cannot** fulfil the order line as per the required **Quantity**, **Price** and **Need By Date**, you may **Reject**  the line.

Please note, you are required to confirm **each line** contained on the Purchase Order.

Confirm

Cannot Fulfill

Propose Change

Revert

☐	#	Line Status	Schedule Planned	Item	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Quantity	UOM	Price	Currency	Line Total	Need By Date	Promised Date	Actions
☐	1	Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	1	Each	100.00	USD	100.00	09/29/25	None	Reject Line 1

You must select an appropriate Reason why the PO line is being rejected, adding comments where necessary.

Once all lines are actioned, please click **Submit x Line(s)**, where x = the number of PO lines being confirmed.

Currency	Line Total	Need By Date	Promised Date	Promis Deliver	Actions
USD	100.00	09/29/25	09/29/25	1	
					Close Submit 1 Line

If successful, a green banner will display confirming the submission, and the Confirmation Status will change from **Pending Confirmation** to **Pending Buyer Review**.

Purchase Order #CP93

1 line submitted successfully

 **Confirmation Awaiting Buyer Review**
The Order Confirmation is pending the buyer's review

General Info

Status Issued - Sent via Email

Confirmation Status Pending Buyer Review

Order Date 09/26/25

7i. Purchase Orders

PO Confirmations - Editing and Submitting

If you **cannot** fulfil the order line as per the required **Quantity**, **Price** and **Need By Date**, you may **Edit**  the line.

Please note, you are required to confirm **each line** contained on the Purchase Order.

ConfirmCannot FulfillPropose ChangeRevert

☐	#	Line Status	Schedule Planned	Item	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Quantity	UOM	Price	Currency	Line Total	Need By Date	Promised Date	Actions
☐	1	Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	4	Each	100.00	USD	400.00	09/29/25	None	 Edit Line 1

When clicked, you have the option to request a change to the **Quantity** and **Price**, as well as state a **Promised Date** for the specific order line. Before you can **Submit**, you must provide a **Reason** by selecting from the dropdown list.

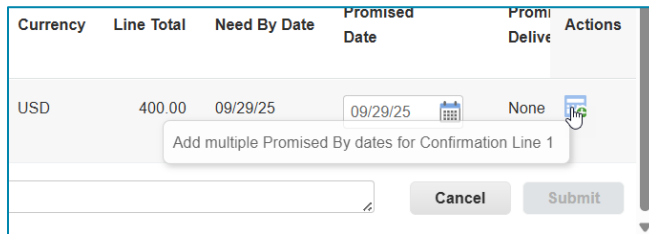
Line Status	Schedule Planned	Item	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Quantity	UOM	Price	Currency	Line Total	Need By Date	Promised Date	Actions
Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	4	Each	100.00	USD	400.00	09/29/25	09/29/25	
							* Reason	Out of stock						
							Comment							
							CancelSubmit							

7j. Purchase Orders

*where x = the number of PO lines being confirmed.

PO Confirmations – Delivery Schedule

If you **cannot** fulfil the order line in a single delivery, you may wish to use the **Delivery Schedule** function, accessible by first selecting **Edit** , and then **Add multiple Promised By dates for Confirmation Line x**,  where x = the PO line number being confirmed.

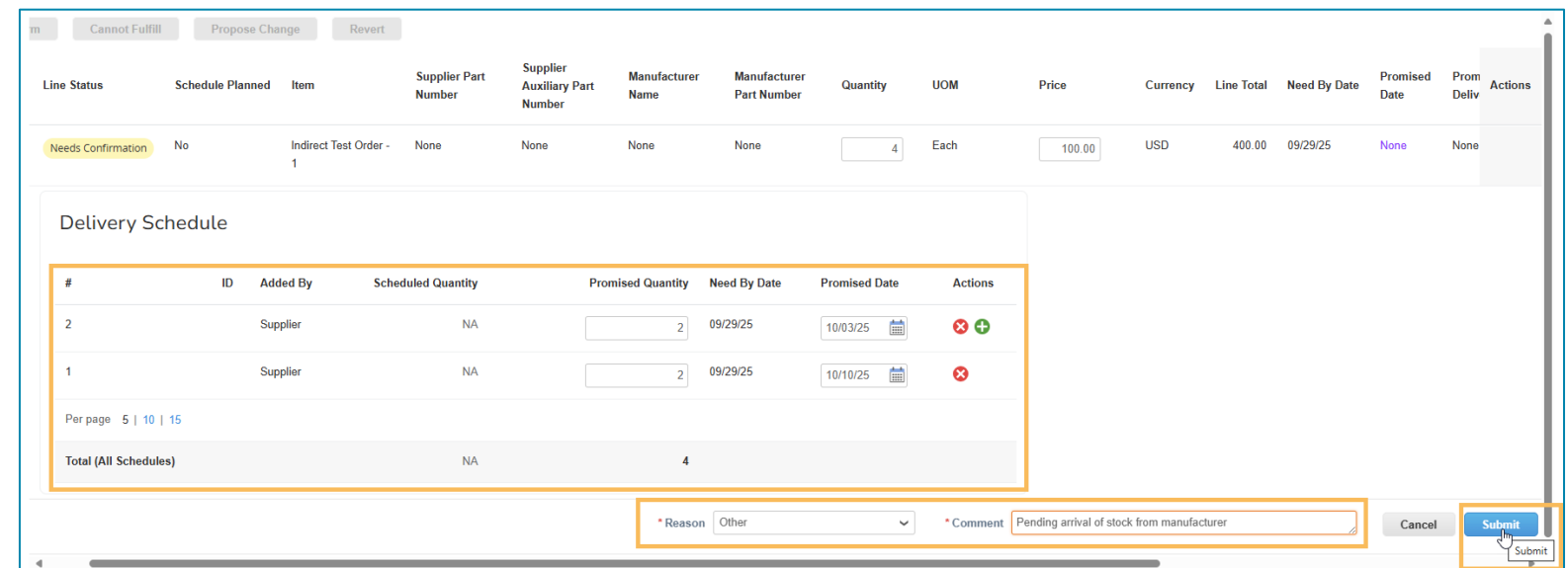


For each delivery line, please state a **Promised Quantity** and **Promised Date**, before selecting a **Reason** (and **Comment** if **Other** selected), and finally to clicking **Submit**.

Again, you will need to **Submit x*** **Line(s)** to complete the confirmation.



Once clicked, the **Delivery Schedule** function appears beneath the order line, and automatically splits the order into two deliveries. You can add additional or remove delivery lines by clicking the corresponding icons  .



7k. Purchase Orders

PO Confirmations – Confirmation Status

For assistance, please either:

- Contact the [Supplier Enablement team](#)
- Follow Coupa's official guidance, found here: [Compass](#)

Following the submission of either an **Edit** or **Rejection**, the **Confirmation Status** will change to **Pending Buyer Review**, after which, one of 3 things will happen...

Confirmed

Purchase Order #CP4176

General Info

Status Issued - Sent via Email

Confirmation Status **Confirmed**

Order Date 09/26/25

Revision Date 09/26/25

Confirmation for [PO #CP4176 V1](#)

Order Confirmation Complete

Order Confirmation was completed at 09/26/25 08:06 PM

The buyer **accepts** the **proposed changes**, and a **revised** order is submitted. See [section 7i](#) for details.

Cancelled

Purchase Order #CP4177

General Info

Status Cancelled - Sent via Email

Confirmation Status **Cancelled**

Order Date 09/26/25

Revision Date 09/26/25

Confirmation for [PO #4177](#)

Order Confirmation Cancelled

Order Confirmation was cancelled at 09/26/25 07:55 PM

The buyer **agrees** to the **Rejection** and the order is **cancelled**. The order **should not** be processed.

Overridden

Purchase Order #CP4178

General Info

Status Issued - Sent via Email

Confirmation Status **Overridden**

Order Date 09/26/25

Revision Date 09/26/25

Confirmation for [PO #4178](#)

Order Confirmation Overridden

Order Confirmation was completed at 09/26/25 08:18 PM

The buyer **rejects** the **proposed changes**. You must **re-start** the **confirmation process**.

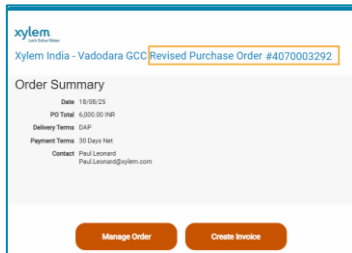
7l. Purchase Orders

PO Confirmations – PO Revisions

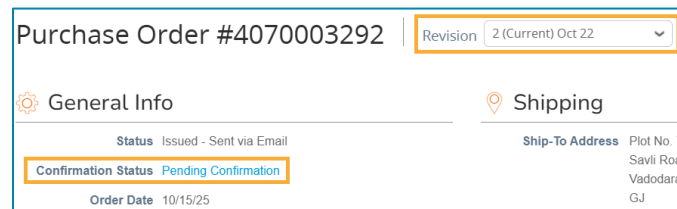
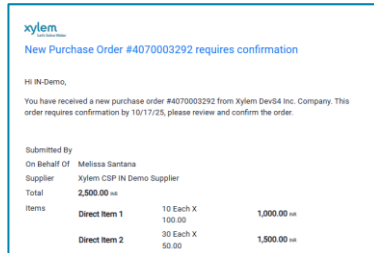
Alongside the confirmation status changes shown in [section 7k](#) following buyer acceptance of either an **Edit** or **Rejection** request, a Purchase Order **revision** or **cancellation** will also be issued displaying the accepted changes.

Revised Direct Orders

Revised [PO Email 1](#)



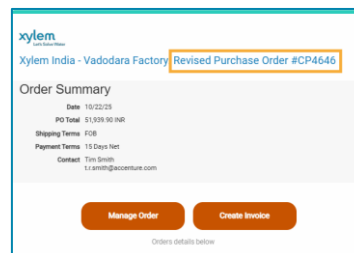
Revised [PO Email 2](#)



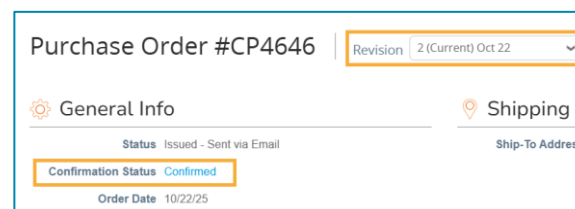
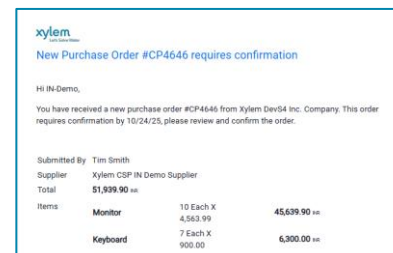
The **revised PO** will show the accepted changes in **Purple** on [PO Email 1](#), and [PO Email 2](#) will state it is awaiting confirmation. **NOTE, further confirmation IS required.**

Revised Indirect Orders

Revised [PO Email 1](#)



Revised [PO Email 2](#)

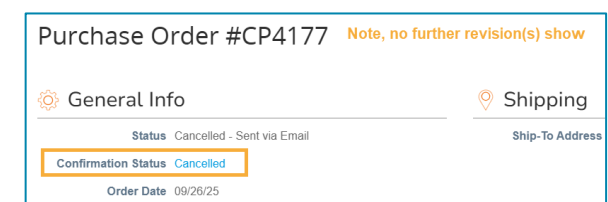
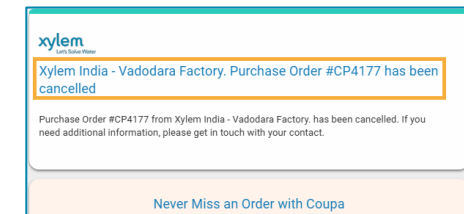


The **revised PO** will show the accepted changes in **Purple** on [PO Email 1](#), whilst [PO Email 2](#) will state it is awaiting confirmation. **NOTE, further confirmation is NOT required.**

Cancelled Orders

(Direct or Indirect)

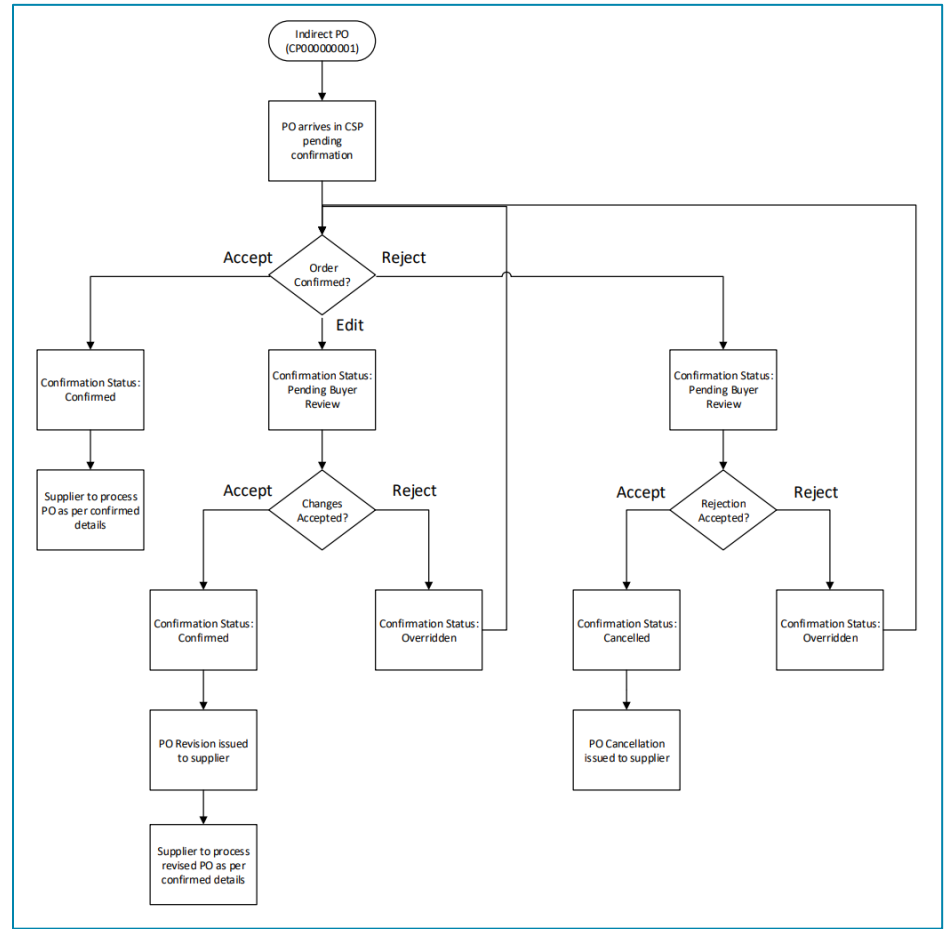
Revised PO Email 1 & 2



The **PO cancellation** will be explicitly referenced on the updated PO email. Note, you will likely receive 2 identical emails notifying you of the cancellation.

7m. Purchase Orders

PO Confirmations – Flowchart Illustration

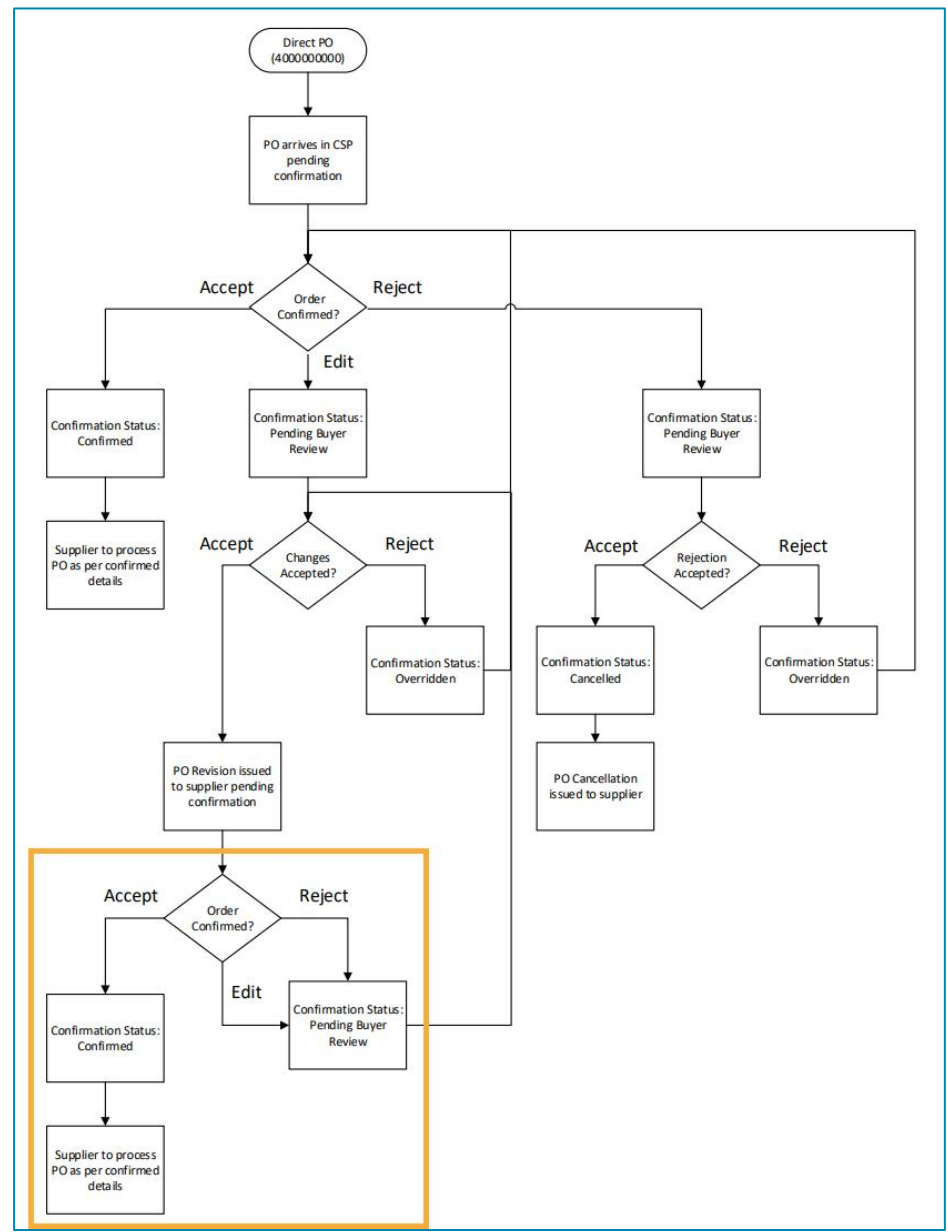


A summary of the various scenarios possible during the **PO Confirmation** process is shown, by order type, beside.

Direct Flowchart

Note, the additional confirmation required for Direct orders following initial change acceptance.

Indirect Flowchart



8. Advanced Shipping Notifications (ASNs)

- a) Flip Purchase Order to ASN
- b) Submitting the ASN
- c) The ASN Menu
- d) ASN Statuses

8a. Advanced Shipping Notification (ASN)

Flip Purchase Order to ASN

For suppliers of goods/materials nearing delivery, Xylem recommends that you notify us of their impending arrival via the **Advanced Shipping Notification (ASN)** feature.

To begin, please click **Orders**, **Orders** and then click the  icon (below **Actions**) of the Purchase Order due for delivery.

Home

Invoices

Orders

Business Profile

Payments

Service Sheets

Items

ASN

Sourcing

Forecasts

Setup

More...

Orders

Order Lines

Returns

Order Changes

Order Line Changes

Order Confirmations

Order Confirmation Lines

More...

Select Customer

Xylem Inc.

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to

View

All

Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned to	Actions
CP93	06/11/25	Issued	06/12/25	1 Each of Indirect Test Order - 1	No	100.00 USD		 Flip to ASN
CP31	06/04/25	Issued	None	2 Each of CSP Test Order+1 - 1	No	4,000.00 MXN		 Flip to ASN

8b. Advanced Shipping Notification (ASN)

Submitting the ASN

The **Create Advance Ship Notice** page will then display, containing the following sections;

- a) **General Info** – Including ASN#, Weight, Ship and Expected Delivery Date
- b) **Ship To** – Including Warehouse, Address (changeable via 📍) and Attention
- c) **Shipping Info** – Including Tracking #, Method and Bill of Lading
- d) **Lines** – Allowing you to adjust the Shipped Qty (for partial deliveries)

Once all mandatory (*) information is populated, you can choose to either:

- i. **Save** and Submit later.
- ii. **Submit** the ASN.

Please note, if you are delivering additional line items not included on the PO, please contact the requestor. If agreed, you may then click **Add PO line #** to populate additional lines on the ASN.

8c. Advanced Shipping Notification (ASN)

The ASN Menu

After clicking **Submit** you will automatically enter the **ASN** menu and be notified of the ASN's successful creation via a green banner (see below).



and be notified of the ASN's

The **ASN** menu displays all current and previous ASNs created, and allows you to perform the following **Actions**:

- a) **Edit** an ASN to return to the **Create Advance Ship Notice** page, by clicking the  icon.
- b) **Cancel** the ASN, by clicking the  icon, or **Delete** an ASN in draft status by clicking the  icon (not shown).

Advance Ship Notices

Advance Ship Notice submitted successfully

Load from fileExport to

ViewAllAdvancedSearch

ASN Number	Status	Ship Date	Expected Delivery Date	Ship to Attention	Carrier	Tracking #	Last Updated Date	ASN Lines	PO Number	Act
123456789	Pending Receipt	06/13/25	06/16/25	Paul Leonard	Test Carrier	123456789	06/12/25	1	CP93	a) b)

Note, you can bulk upload multiple ASNs via the **Load from file** option. For support, please contact the [Supplier Enablement team](#).

8d. Advanced Shipping Notification (ASN)

ASN Statuses:

The table below summarises the various **statuses** of an **ASN**:

Status	Description
Draft	The ASN has been created, but it has not been submitted to Xylem/your customer.
Cancelled	The ASN has been cancelled.
Partially Received	Xylem/your customer has received a part of your shipment.
Pending Receipt	Xylem/your customer is waiting for the shipment.
Received	Xylem/your customer has received your shipment.

If you require further support regarding ASNs, please contact the [Supplier Enablement team](#).

9. Invoices

- a) Xylem Expectations
- b) Flip Purchase Order to Invoice
- c) Header Level
- d) Static Discounts - Early Payment Discount (EPD)
- e) Static Discounts - EPD Codes
- f) Line and Summary Level
- g) Successful and Unsuccessful Submissions
- h) Invoice Menu
- i) Invoice Statuses
- j) No-PO No-Pay Policy
- k) Complaint Invoicing

9a. Invoices

Xylem Expectations

Xylem expects all* suppliers to submit invoices through the CSP.

Failure to submit invoices via the CSP and/or without referencing a valid PO number may result in **rejections** or **delays** in payment processing.

*Xylem may grant exceptions for extenuating circumstances, such as suppliers located in countries with complex regulatory requirements – see [section 9k](#) for more details.

To generate an invoice from a PO, please either:

- a) Click **Orders**, **Orders** and then click the 📄 icon of the Purchase Order due for invoicing...OR...
- b) ...click **Create Invoice** from within the PO itself.

To locate the appropriate PO for invoicing, please change the **View** to '**Orders not invoiced**', and/or enter the PO number in the **Search** function.

coupa supplier portal

XYLEM | NOTIFICATIONS 5 | HELP

Home Invoices **Orders** Business Profile Payments Service Sheets Items ASN Sourcing Forecasts Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer Xylem Inc.

Purchase Orders

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the 📄 Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP93	06/11/25	Issued	06/12/25	1 Each of Indirect Test Order - 1	No	100.00 USD		Create Invoice
CP31	06/04/25	Issued	None	2 Each of CSP Test Order+1 - 1	No			Create Invoice

Accept PO #CP93 and Create Invoice

OR

Total USD 100.00

b) **Create Invoice** Save Print View

Mute Comments

9b. Invoices

Flip Purchase Order to Invoice

A CSP invoice, like a paper or PDF invoice, comprises of three levels, being:

- a) **Header** – General Info, Invoice From and To details
- b) **Line** – All line items included on the PO being flipped
- c) **Summary** – Including taxes, Shipping and Handling

The proceeding sections will dive deeper into the functionality of each level.

Note before proceeding, please ensure you;

- i. Have a local copy of your own ERP/government generated invoice ready for upload
- ii. Complete all mandatory fields, marked with an (*).

For suppliers registered in countries subject to national invoicing regulations, it may either be **not recommended** to use the PO flip method, or alternatively **additional steps** may be required to submit invoices. Please see [section 9k](#) for more details.

The screenshot displays the 'Create Invoice' interface in the Coupa Supplier Portal. The top navigation bar includes links for Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More. The 'Create Invoice' section is active, with a 'Select Customer' dropdown set to 'Xylem Inc.' and a 'Create' button.

a) General Info section includes fields for:

- Invoice #**: A text input field.
- Invoice Date**: A date picker set to 09/12/25.
- Payment Term**: A dropdown set to '30 Days Net'.
- Currency**: A dropdown set to 'USD'.
- Status**: A dropdown set to 'Draft'.
- Image Scan**: A 'Choose File' button.
- Supplier Note**: A text area.
- Attachments**: A link to 'Add File'.
- From** section: Includes 'Supplier' (Xylem CSP Test+1), 'Supplier Tax ID' (53-5234567), 'Invoice From Address' (301 Water Street SE, Washington, DC 20003, United States), and 'Remit To Address' (No address selected).
- To** section: Includes 'Customer' (Xylem Inc.), 'Bill To Address' (Xylem Monterrey, Autopista al Aeropuerto No. 4, Col. San Nabor, 67132 Guadalupe N.L.E., Mexico), 'Buyer VAT ID' (SM5910520N26), and 'Ship to Address' (Autopista al Aeropuerto No. 4, Col. San Nabor, 67132 Guadalupe N.L.E., Mexico, Location Code: 1901).

b) Lines section shows a table with columns: Type, Description, Qty, UOM, Price, and a total of 100.00. The table contains one line item: 'Indirect Test Order - 1' with a quantity of 1.000000 and a price of 100.00. Below the table are fields for 'PO Line' (CPSO-1), 'Service Sheet Line' (None), 'Contract' (None), 'Credit Line' (None), 'Supplier Part Number', and 'Billing' (CHANGE ME-CHANGE ME-CHANGE ME-4851000001). A 'Taxes' section is also present with columns for Tax Description, Tax Rate, Tax Amount, and Tax Reference.

c) Totals & Taxes section shows a summary of the invoice totals:

Category	Amount
Lines Net Total	100.00
Lines Tax Totals	0.00
Shipping	
Tax	0.000
Handling	
Tax	0.000
Total Tax	0.00
Net Total	100.00
Total	100.00

At the bottom of the form are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'.

9c. Invoices

Header Level

Key fields of the header level include;

- a) **Invoice #** - Please enter the invoice number contained on your own ERP/Government generated invoice. Once entered, a green tick ✓ will appear denoting you are OK to proceed. If you enter a duplicate number a red icon ⚠ will appear, preventing you from submitting.
- b) **Image Scan** – Please upload a local copy of your own ERP/Government generated invoice. Note, despite not showing as a mandatory field, you **will not** be able to submit your CSP invoice without first uploading a local invoice.
- c) **Supplier Tax/VAT ID, Invoice From, Remit-To and Ship From Address** – If you have multiple legal entities (see [section 6d](#)), invoice from, remit-to and/or ship-from addresses, you will be able to select the appropriate ID/addresses via the dropdown/magnifying glass icons 🔍.
- d) **Buyer Tax/VAT ID** – If the Xylem entity you are transacting with has multiple IDs, you will be able to select the appropriate ID via the dropdown.

Remember, all IDs/addresses **must match** that of the ERP/government generated invoice you upload.

Create Invoice Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

General Info

a) * Invoice # CP93-1 Test Invoice 1 ✓

* Invoice Date 06/12/25

Payment Term 30 Days Net Get Paid Faster

* Currency USD

Status Draft

b) Image Scan Choose File Test Invoice.pdf

Supplier Note

Attachments Add File | URL | Text

d) From

* Supplier Xylem CSP Test+1

Supplier Tax ID 53-1234567

* Invoice From Address Xylem CSP Test+1
301 Water Street SE
Washington, DC 20003
United States

* Remit-To Address No address selected

* Ship From Address Xylem CSP Test+1
301 Water Street SE
Washington, DC 20003
United States

To

Customer Xylem Inc.

* Bill To Address Xylem Monterrey
Autopista al Aeropuerto No. 4, Col.
Sin Nombre
67132 Guadalupe NLE
Mexico
VAT ID SMS910520NZ8

e) Buyer VAT ID SMS910520NZ8

* Ship To Address Autopista al Aeropuerto No 4,
Col. Sin Nombre

Choose Invoicing Details

* Legal Entity Xylem CSP Test+1 Add New

Invoice From 301 Water Street SE
Washington, DC 20003
United States
United States (53-1234567)

* Remit-To Select Add New

* Ship From Address Select

Addresses
301 Water Street SE, Washington, DC 20003, United States, United States (53-1234567)

Bank Accounts
Test Bank ***011 (301 Water Street SE, Washington, DC 20003, United States)

Cancel

9d. Invoices

Static Discounts - Early Payment Discount (EPD)

If presented with the **Get Paid Faster** icon, you have the option to select an early payment discount code* from the list displayed.

If selected, these terms will replace the default payment terms and cannot be reversed.

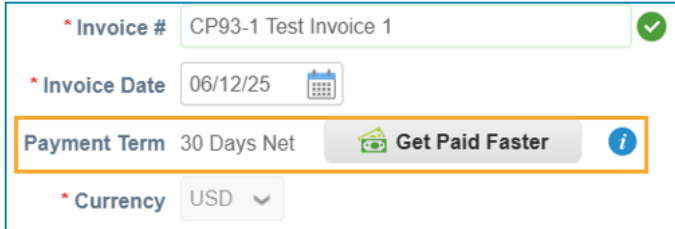
Therefore, if you change your mind about the terms, you will need to request a new purchase order.

To view the terms offered, please click on the  **Get Paid Faster** icon and browse the **New Payment Code(s)*** available.

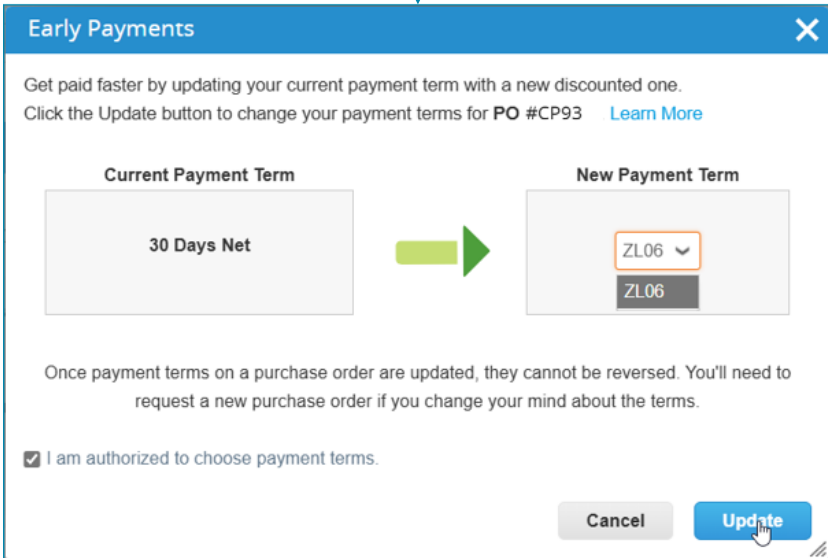
Once selected, you will first be required to confirm that **‘I am authorized to choose payment terms.’**, before clicking **‘Update’**.

You will then see the Payment Term field on the Create Invoice screen has updated to the discounted terms selected.

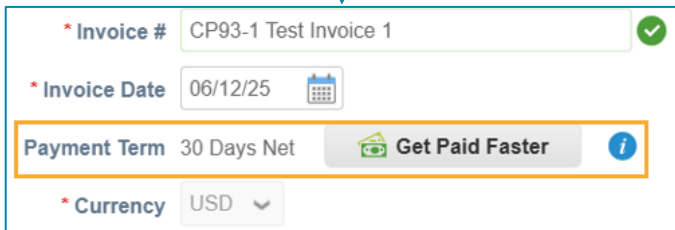
*Please see [section 9e](#) for a full description of each payment code displayed.



This screenshot shows the 'Create Invoice' form. The 'Invoice #' is 'CP93-1 Test Invoice 1'. The 'Invoice Date' is '06/12/25'. The 'Payment Term' is '30 Days Net'. A 'Get Paid Faster' button with a money bag icon and an information icon is highlighted with an orange box. The 'Currency' is 'USD'.



This screenshot shows the 'Early Payments' dialog box. It explains that users can get paid faster by updating their current payment term with a new discounted one. It shows the 'Current Payment Term' as '30 Days Net' and the 'New Payment Term' as 'ZL06'. A green arrow points from the current term to the new term. Below this, it states: 'Once payment terms on a purchase order are updated, they cannot be reversed. You'll need to request a new purchase order if you change your mind about the terms.' There is a checkbox 'I am authorized to choose payment terms.' which is checked. At the bottom right are 'Cancel' and 'Update' buttons. A hand cursor is over the 'Update' button.



This screenshot shows the 'Create Invoice' form after the update. The 'Payment Term' field now displays 'ZL06' instead of '30 Days Net'. The 'Get Paid Faster' button remains highlighted with an orange box.

9e. Invoices

Static Discounts – EPD Codes

At the point of selection, Coupa only displays the early payment **code**, rather than discounted **term**. Therefore, a full breakdown of each payment code and the discounted payment terms it offers, are shown below...

Payment Term	EPD Payment Code	EPD Payment Term
30 days net	ZL06	30 days net, 1% 15 days
60 days net	ZL10	60 days net, 2.5% 15 days
90 days net	ZL14	90 days net, 3% 15 days
120 days net	ZL17	120 days net, 3.5% 15 days

If you require further support regarding early payment discount, please contact the [Supplier Enablement team](#).

9f. Invoices

Line and Summary Level

Key fields of the Line and Summary levels include;

- a) **Line** – Adjust the Description, Qty, UoM (Unit of Measure) and Price as applicable.
- b) **PO Line** – If incorrect, change the order line of the PO you are invoicing.
- c) **Supplier Part Number** – Can be added where applicable.
- d) **Taxes** – Select all applicable line level taxes, using the dropdown.
- e) **Add Line** – Add if you need to invoice additional non-PO backed items.
- f) **Shipping** – Please enter any applicable summary shipping charges and applicable shipping taxes, using the dropdown.
- g) **Handling** – Please enter any applicable summary handling charges and applicable handling taxes, using the dropdown.
- h) **Calculate and Submit** – Before you submit, please first **Calculate** to ensure the totals match expectation, before proceeding to click **Submit**.

Remember, quantities, UoMs, taxes and totals **must match** that of the ERP/government generated invoice you upload.

The screenshot displays the 'Lines' form in an invoice system. The form is divided into several sections: 'Line Item', 'PO Line', 'Supplier Part Number', 'Taxes', 'Totals & Taxes', 'Shipping', and 'Handling'. Annotations a) through h) point to specific fields and buttons.

Line Item: Type (Shopping Cart icon), Description (Indirect Test Order - 1), Qty (1.000000), UOM (Each), Price (100.00). Annotation a) points to the Price field.

PO Line: PO Line (CP93-1), Clear button, Service Sheet Line (None), Contract (dropdown), Credit Line (None). Annotation b) points to the PO Line field.

Supplier Part Number: Supplier Part Number (text input), Billing (CHANGE ME-CHANGE ME-CHANGE ME-6851600001). Annotation c) points to the Supplier Part Number field.

Taxes: Tax Description (dropdown), Tax Rate (0.000), Tax Amount (0.00), Tax Reference (text input). Annotation d) points to the Tax Description dropdown.

Totals & Taxes: Lines Net Total (100.00), Lines Tax Totals (0.00). Annotation e) points to the 'Add Line' button.

Shipping: Shipping (text input, 10), Tax (dropdown), Tax Reference (text input). Annotation f) points to the Shipping field.

Handling: Handling (text input), Tax (dropdown), Tax Reference (text input). Annotation g) points to the Handling field.

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit. Annotation h) points to the Calculate and Submit buttons.

9g. Invoices

Successful and Unsuccessful Submissions

Given you cannot change the invoice once submitted, after clicking **Submit**, you will be prompted to confirm all details are correct.

Assuming all details are correct and all totals match, please click **Send Invoice**, or alternatively click **Continue Editing** to return to the CSP invoice.

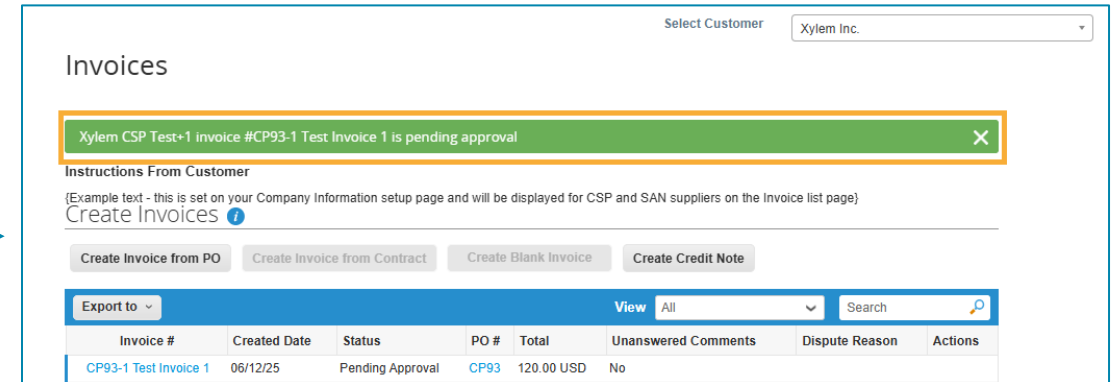
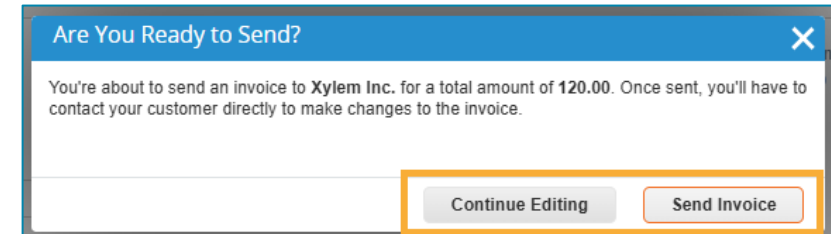
If the submission is successful, you will automatically enter the **Invoice** menu   and be notified of the invoice's successful creation via a green banner (see right).

If any field (mandatory or otherwise) does not match Xylem's submission criteria for the applicable Country/Region, you will be blocked from submitting the invoice (see right).

Please correct/update the field in question and click **Calculate** and **Submit** again.

For assistance, please either:

- Contact the [Supplier Enablement team](#)
- Follow Coupa's official guidance, found here: [Compass](#)



Please fix the errors below

- Please ensure a image scan of the invoice is attached prior to submission

9h. Invoices

Invoice Menu

The **Invoices** menu displays all current and previous invoices and credit notes submitted for the selected customer. From here, you can:

- a) **Create Invoice from PO** (PO Backed), **Create Blank Invoice** (Non-PO Backed – if active) and **Create Credit Note**
- b) Enter the details of any given **Invoice/Credit Note**, check the **Status** and preform any **Actions** displayed.

Note, **Actions** are only possible for certain statuses – see right.

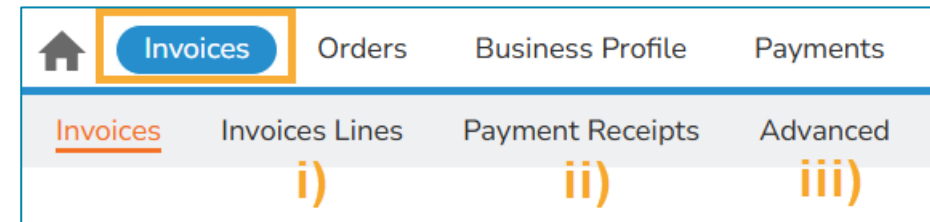
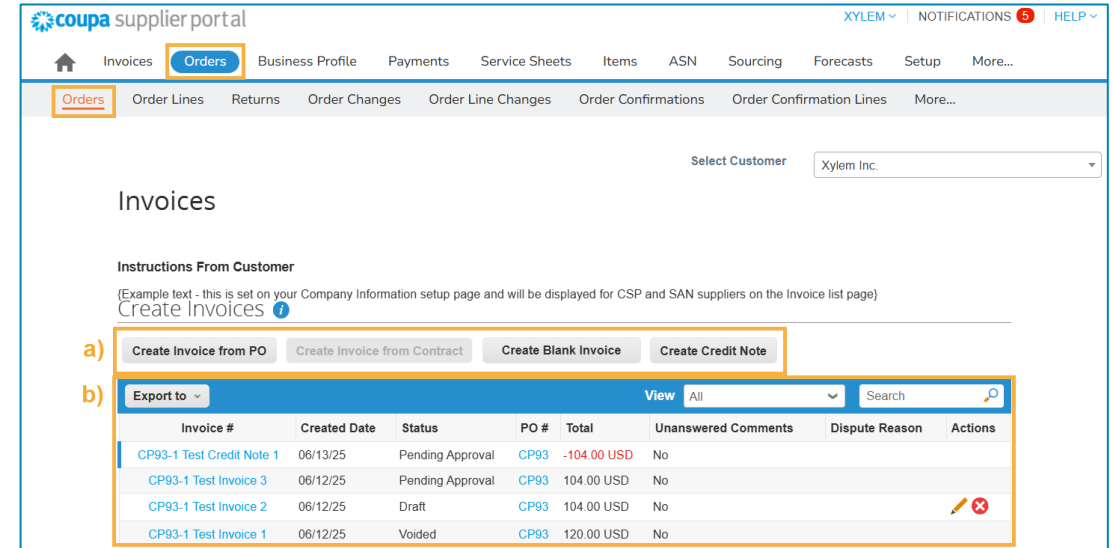
A full overview of statuses can be found on the [section 9i](#).

The, remaining sub menus of the Invoices menu include:

- i. **Invoice Lines** – See line level invoice details per invoice
- ii. **Payment Receipts**
- iii. **Advanced** – Premium features including reminders and reports

For assistance, please either:

- Contact the [Supplier Enablement team](#)
- Follow Coupa’s official guidance, found here: [Compass](#)



9i. Invoices

Invoice Statuses

A summary of invoice statuses is shown below...

Status	Description
Abandoned	The disputed invoice has been abandoned. Xylem 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 Xylem.
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 Xylem 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 Xylem.
Pending Approval	The invoice is currently under review by Xylem customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact Xylem customer to get the invoice back on track.

9j. Invoices

No-PO No-Pay Policy

Please note, Xylem operates a **No-PO No-Pay** policy.

Therefore, where a Xylem PO exists, the PO flip method of invoicing as outlined by sections [9a-9g](#), is the primary invoicing method recommend by Xylem*.

Therefore, please ensure you have a **valid PO number before** commencing the invoicing process.

If you do not, or the PO number is not displayed in the CSP, then please reach out to your local Xylem contact.

Please note:

- i. Non-PO backed invoicing is possible via the CSP and training can be provided **ONLY** once pre-authorisation is given by Xylem.
- ii. *Invoicing regulations in some countries require additional steps to submit invoices via a PO flip, or alternatively prevent submission via this method entirely. For more country-specific information, please see [section 9k](#).

9k. Invoices

Compliant Invoicing

Xylem operate in more than 150 countries globally and are subject to a variety of national invoicing regulations. As a result, in some countries it is either;

- **Not recommended** to use the **PO flip method**, OR
- **Additional steps** are required to submit invoices via the **PO flip method**

The table below summarises these CSP invoicing nuances by country (in which Xylem is using Coupa)...

Country	PO Flip Recommended	Additional Steps Required	Recommended Method (if different)	Link to training material	Comments
Mexico	No	N/A	CSP – Create Blank Invoice	Seminario web de formación sobre el Portal de proveedores de Coupa (CSP) 2	Watch from 25:10 onwards
India	Yes	Yes	N/A	Coupa Supplier Portal (CSP) Training Webinar 1 Xylem India	Watch from 33:06 onwards

If you require further support regarding compliant invoicing, please contact the [Supplier Enablement team](#).

10. Credit Notes

- a) Credit Note generation methods
- b) Header level of a credit note
- c) Line and Summary Level of Credit Note
- d) Successful and Unsuccessful Submissions
- e) Generation via Create Credit Note from within the Invoices menu

10a. Credit Notes

Credit Note generation methods

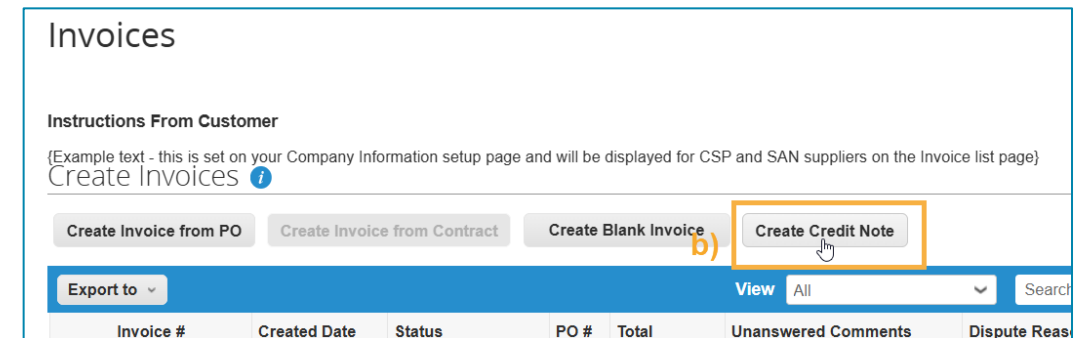
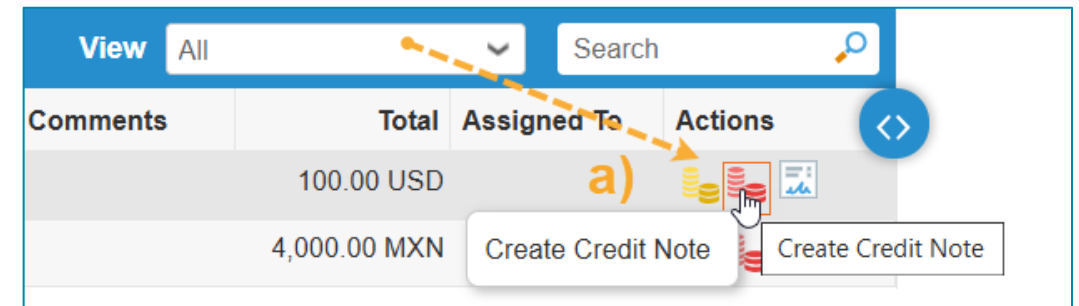
A credit note, like an invoice, can be generated by two methods:

- a) Click **Orders**, **Orders** and then click the  icon of the Purchase Order due for crediting...OR...
- b) ...click **Invoices**, **Invoices** and then click **Create Credit Note** from within the Invoices menu.

To locate the appropriate PO for invoicing, please enter the PO number in the **Search** function in either the **Orders** or **Invoices** menu.

Both methods will generate a **Credit Note** containing the same **Header**, **Line** and **Summary** levels as the invoice.

The difference being that method b) does not flip the PO to a credit note but instead requires you to select the invoice against which to credit (see [section 10e](#)).



10b. Credit Notes

Header Level of Credit Note

Key fields of the header level include;

- a) **Credit Note #** - Please enter the credit note number contained on your own ERP/Government generated credit note. Once entered, a green tick ✓ will appear confirming you are OK to proceed. If you enter a duplicate number a red icon ⚠ will appear, preventing you from submitting.
- b) **Original Invoice #** - Please enter the original invoice number against which you are crediting.
- c) **Image Scan** – Please upload a local copy of your own ERP/Government generated credit note. Note, despite not showing as a mandatory field, you **will not** be able to submit your CSP invoice without first uploading a file.
- d) **Supplier Tax/VAT ID, Invoice From, Remit-To and Ship From Address** – If you have multiple legal entities (see [section 6d](#)), invoice from, remit-to and/or ship-from addresses, you will be able to select the appropriate ID/addresses via the dropdown/magnifying glass icons 🔍.
- e) **Buyer Tax/VAT ID** – If the Xylem entity you are transacting with has multiple IDs, you will be able to select the appropriate ID via the dropdown.

10c. Credit Notes

Line and Summary Level of Credit Note

Key fields of the Line and Summary levels include;

- a) **Line** – Adjust the Description, Qty, UoM (Unit of Measure) and Price as applicable.
- b) **PO Line** – If incorrect, change the order line of the PO you are crediting.
- c) **Supplier Part Number** – Can be added where applicable.
- d) **Taxes** – Select all applicable line level taxes, using the dropdown.
- e) **Add Line** – Add if you need to credit additional non-PO backed items.
- f) **Shipping** – Please enter any applicable summary shipping charges and shipping taxes, using the dropdown. Credit values must be negative.
- g) **Handling** – Please enter any applicable summary handling charges and handling taxes, using the dropdown. Credit values must be negative.
- h) **Calculate and Submit** – Before you submit, please first **Calculate** to ensure the totals match expectation, before proceeding to click **Submit**.

Remember, quantities, UoMs, taxes and totals **must match** that of the ERP/government generated credit note you upload.

The screenshot shows the 'Lines' interface in the Xylem system. It includes a table for line items with columns for Type, Description, Qty, UOM, Price, and a total of -100.00. Below this are fields for PO Line (CP93-1), Service Sheet Line (None), Contract, and Supplier Part Number. A Billing section shows 'CHANGE ME-CHANGE ME-CHANGE ME-6851600001'. A Taxes section has a dropdown for Tax Description, with fields for Tax Rate (0.000), Tax Amount (0.00), and Tax Reference. At the bottom, there are buttons for 'Add Line', 'Pick lines from PO', 'Pick lines from Contract', 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A 'Totals & Taxes' section on the right shows 'Lines Net Total' as -100.00 and 'Lines Tax Totals' as 0.00. Below this, 'Shipping' and 'Handling' sections have fields for charges and taxes, both with negative values (-2). The final 'Total' is -104.00.

Type	Description	Qty	UOM	Price	
Indirect Test Order - 1		-1.0	Each	100.00	-100.00

PO Line: CP93-1
Service Sheet Line: None
Contract:
Supplier Part Number:
Billing: CHANGE ME-CHANGE ME-CHANGE ME-6851600001
Taxes:
Tax Description:
Tax Rate: 0.000
Tax Amount: 0.00
Tax Reference:
Shipping: -2
Tax:
Tax Reference:
Handling: -2
Tax:
Tax Reference:
Total Tax: 0.00
Net Total: -104.00
Total: -104.00

10d. Credit Notes

Successful and Unsuccessful Submissions

Given you cannot change the credit note once submitted, after clicking **Submit**, you will be prompted to confirm all details are correct.

Assuming all details are correct and all totals match, please click **Send Credit Note**, or alternatively click **Continue Editing** to return to the CSP credit note.

If the submission is successful, you will automatically enter the **Invoice** menu   and be notified of the credit note's successful submission via a green banner (see right).

If any field (mandatory or otherwise) does not match Xylem's submission criteria for the applicable Country/Region, you will be blocked from submitting the credit note (see right).

Please correct/update the field in question and click **Calculate** and **Submit** again.

Are You Ready to Send?

You're about to send an credit note to **Xylem Inc.** for a total amount of **-104.00**. Once sent, you'll have to contact your customer directly to make changes to the credit note.

[Continue Editing](#) [Send Credit Note](#)

Invoices

Xylem CSP Test+1 credit note #CP93-1 Test Credit Note 1 is pending approval

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

Export to [View](#) All [Search](#)

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CP93-1 Test Credit Note 1	06/13/25	Pending Approval	CP93	-104.00 USD	No		

Please fix the errors below

- Please ensure a image scan of the invoice is attached prior to submission

10e. Credit Notes

Generation via Create Credit Note from within the Invoices menu

When crediting via the **Create Credit Note** button from within the Invoices menu, you will be required to:

a) Select the Reason

- i. Use **'Resolve issue for invoice number'** to credit invoices in a **disputed** status.
- ii. Use **'Other (e.g. rebate)'** to credit an invoice due to any other purpose.



b) If **'Resolve issue for invoice number'** is chosen, you will need to select either;

- i. **Completely cancel the invoice with a credit note** – full credit
- ii. **Adjust invoice with a credit note** – partial credit



This credit note applies to invoice **CP93-1 Test Invoice 3**. When approved, the credit will fully cancel the invoice's impact to the transaction.

If you require further support regarding raising credit notes, please contact the [Supplier Enablement team](#).

11. Payments

- a) Payments Information View
- b) Payments Menu

11b. Payments

Payments Menu

Please note, the **Payments** menu applies only to payments made through **Coupa Pay**. Currently, **Xylem does not support this feature**, and therefore all payment information is be displayed within the **Invoices** menu - see [section 11a](#).

coupa supplier portal

IN-DEMO | NOTIFICATIONS 2

 Invoices Orders Business Profile **Payments** Service Sheets Items ASN Sourcing Forecasts Setup More...

Invoice Payments

PO Payments

Select Customer

Xylem DevS4 Inc.

Invoice Payments

Instructions From Customer

Payments made by Coupa Pay Customers will be displayed below

Remittance by Payment #

Remittance by Invoice #

Export to

View All

Search

Payment #	Invoice #	Status	Payment Method	Payment Released Date	Total	Actions
No rows.						

Per page 15 | 45 | 90

Feature not supported by Xylem

12. Supplier Information Management (SIM) Requests

- a) SIM Overview
- b) The 3 types of SIM Forms
- c) Completing the SIM Forms

12a. SIM Overview

SIM Overview

Xylem may request information from you to update their own Coupa master data, which will arrive in the form of a **Supplier Information Management (SIM)** request.

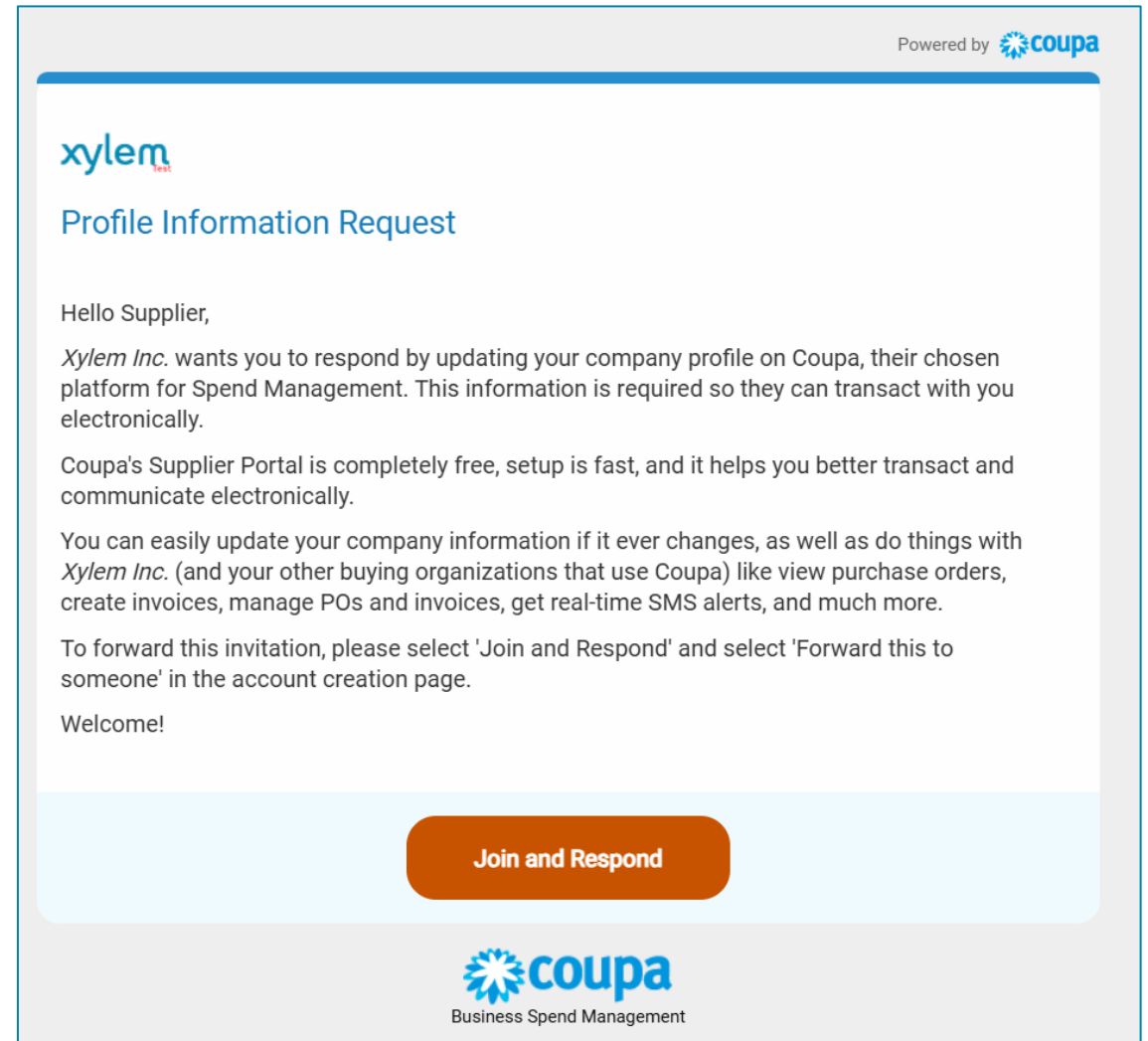
Typically, such requests will arrive to either:

- 1) **New Supplier** - pending future transactions
- 2) **Existing Supplier** - requiring periodic review

In both instances, you will receive an email notifying you that a SIM requests is pending your completion.

The example beside shows the email invitation you receive as a **New** supplier, who is being asked to first register for the CSP, before completing the relevant SIM form.

Please click **Join and Respond** (New Supplier) or **Update Profile** (Existing Supplier)



12b. The 3 types of SIM Forms

The 3 SIM Form variants

Xylem currently operates 3 distinct SIM forms:

- 1) External Supplier Onboarding Form
- 2) External Supplier Update Form – Procurement Details
- 3) External Supplier Update Form – Finance Details

An overview of the topics requested by each form can be seen below...

SIM Topic	1) Onboarding Form	2) Procurement Details	3) Finance Details
Supplier Information	✓	✓	✗
Primary Contact Information	✓	✓	✗
Supplier Email Information	✓	✓	✗
Primary/Alternate Addresses	✓	✓	✗
Remit-To Addresses	✓	✗	✓
Banking Details	✓	✗	✓
Tax Information	✓	✗	✓
Additional Information	✓	✓	✗

Xylem Inc.

Form Responses

Form

[External Supplier Update Form - Procurement Details 19May2025](#)

[External Supplier Update Form - Finance Details 10June2025](#)

[External Supplier Onboarding Form](#)

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12c. Completing the SIM Forms

Completing the SIM forms

When completing a SIM form, please scroll through each section and complete all fields shown. Mandatory fields are denoted by an asterix (*).

If you have already registered for the CSP, you will notice some fields have been auto-filled with the information you entered during CSP Onboarding (see [section 4](#)).

You can **Save** a form at any point to return to it later.

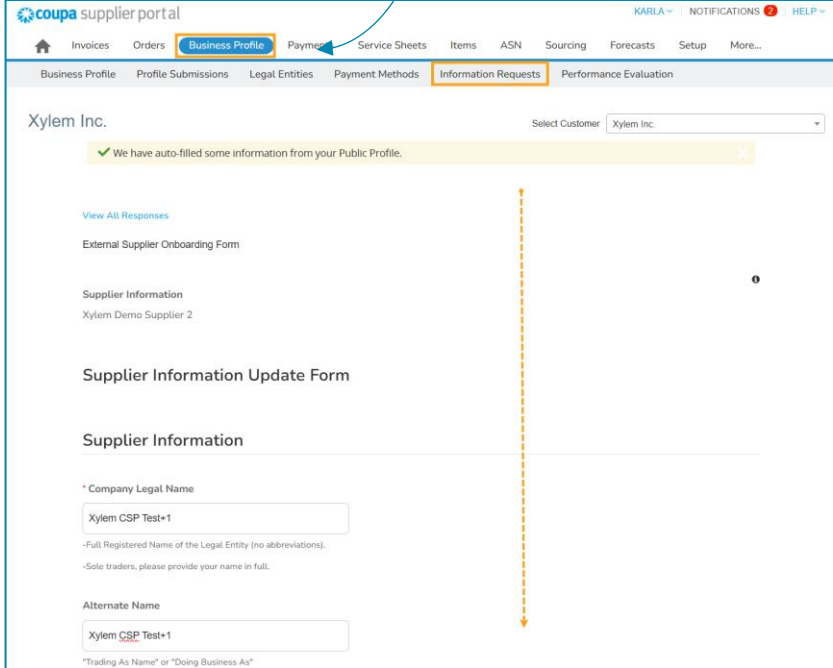
Once all details are completed, please click **Submit for Approval**.

If successful, a green banner will display noting ‘**Your information has been submitted**’, and you will be notified via email titled ‘**Profile Info Recently Updated for Xylem on Coupa**’.

Once the internal approval process is complete, you will receive a further email titled, ‘**Profile Info submitted to Xylem was Approved**’.

If you require further support regarding SIM forms, please contact the [Supplier Enablement team](#).

Please note, it is also possible to access assigned SIM forms via the **Business Profile** and **Information Requests** menu.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Invoices, Orders, Business Profile (highlighted with a blue box), Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More... Below this, a secondary navigation bar shows Business Profile, Profile Submissions, Legal Entities, Payment Methods, Information Requests (highlighted with a blue box), and Performance Evaluation. The main content area is for Xylem Inc. and displays a green banner stating 'We have auto-filled some information from your Public Profile.' Below this, there are sections for 'External Supplier Onboarding Form', 'Supplier Information' (showing 'Xylem Demo Supplier 2'), and 'Supplier Information Update Form'. The 'Supplier Information' section includes fields for 'Company Legal Name' (filled with 'Xylem CSP Test*1'), 'Full Registered Name of the Legal Entity (no abbreviations)', 'Alternate Name' (filled with 'Xylem CSP Test*1'), and a note about 'Trading As Name' or 'Doing Business As'.

13. Support

Who to contact?

If you require further assistance regarding any functionality of the Coupa Supplier Portal, please contact **Xylem's** dedicated **Supplier Enablement** team via the following mailboxes:

Location	Support Mailbox
Americas	supplier.enablement.amer@xylem.com
Asia and Pacific	supplier.enablement.apac@xylem.com
Europe, the Middle East and Africa	supplier.enablement.emea@xylem.com

Coupa also offers various support materials for suppliers transacting via the Coupa Supplier Portal, including:

[Help Page | Coupa Suppliers](#)

[FAQ | Coupa Suppliers](#)

Along with their own dedicated mailbox: supplier@coupa.com

Thank you for your
continued cooperation