Coupa Supplier Portal Training Guide

December 2025

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Introduction

AECOM is now using Coupa as our procurement tool, including the Coupa Supplier Portal (CSP), to be used our suppliers, to receive purchase orders and submit invoices electronically.

The Coupa Supplier Portal is a 3rd party tool that allows suppliers to connect to multiple customers to help manage their purchase orders and invoicing. If you are already using the Coupa Supplier Portal, you will not need to register a new account but will link to AECOM via an email invitation we will send you.

The Coupa Supplier Portal is developed and maintained entirely by Coupa so you may receive paid subscription requests, it is not required for you to sign up for these services to transact with AECOM.

The benefits of using the Coupa Supplier Portal are as follows:

- There is no cost to you to use the Coupa Supplier Portal.
- The portal provides you with increased transparency and visibility to the status of your invoices. You will be able to see if your invoice has been submitted, approved, ready for payment or paid.
- You will be able to personalize notifications to keep you informed regarding purchase orders, invoices, etc. via email.

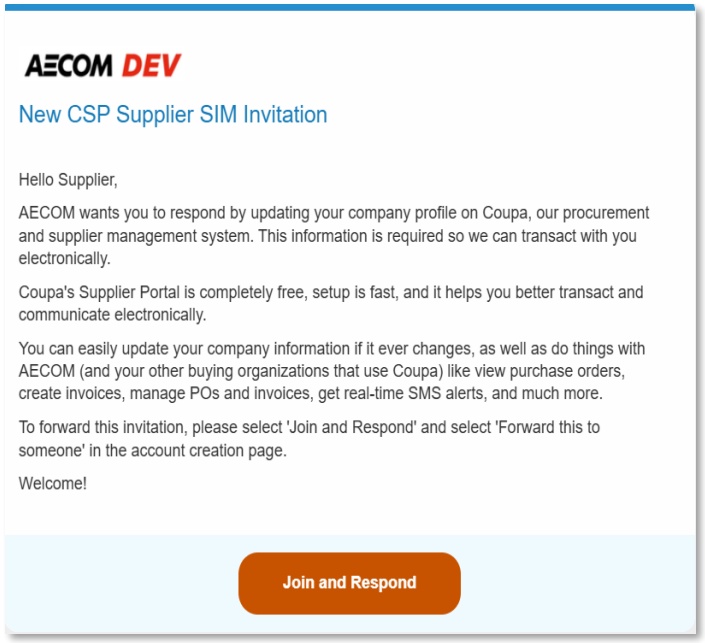
This document provides an overview of the Coupa Supplier Portal (CSP), including registration and login, responding to AECOM information requests, receiving purchase orders (POs) and invoicing.

Registering for the Coupa Supplier Portal

Setting up your account in the Coupa Supplier Portal

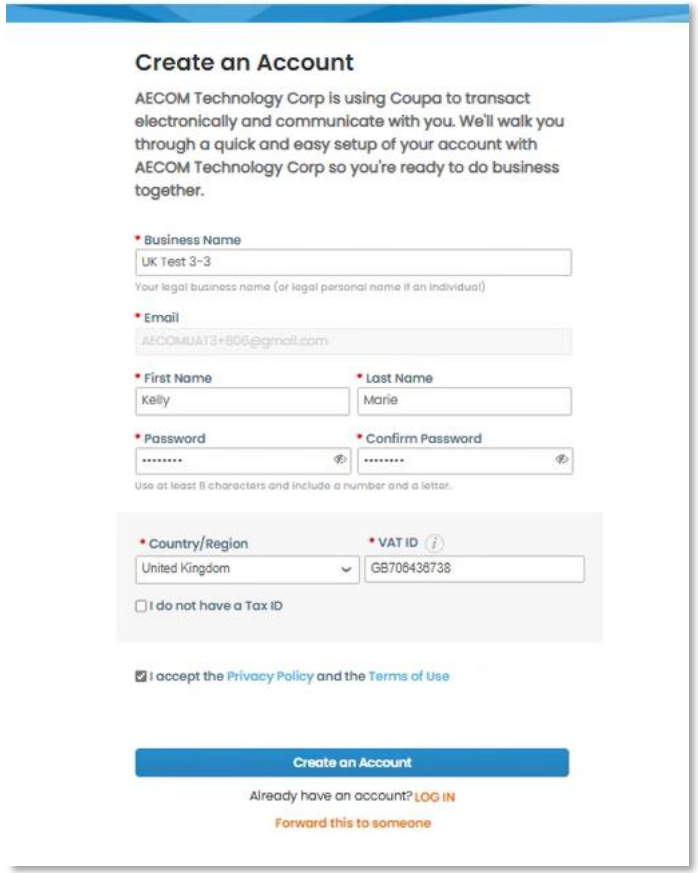
AECOM requires Third Parties to register for the Coupa Supplier Portal (CSP). You will use the CSP to transact with AECOM for purchase orders and invoicing. You will receive an email to register from do_not_reply@aecom.coupahost.com.

1. **The Profile Information Request** email you will receive outlines what AECOM needs you to do. Click on *Join and Respond* to create a CSP account.

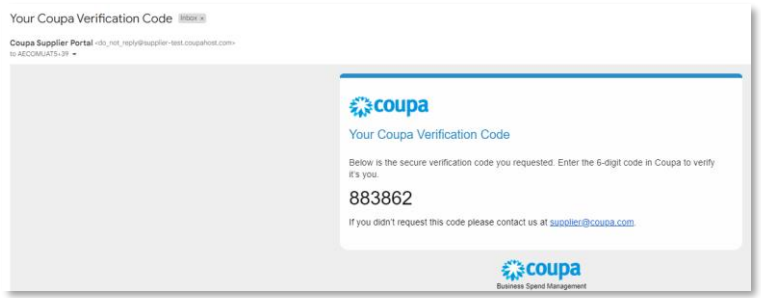


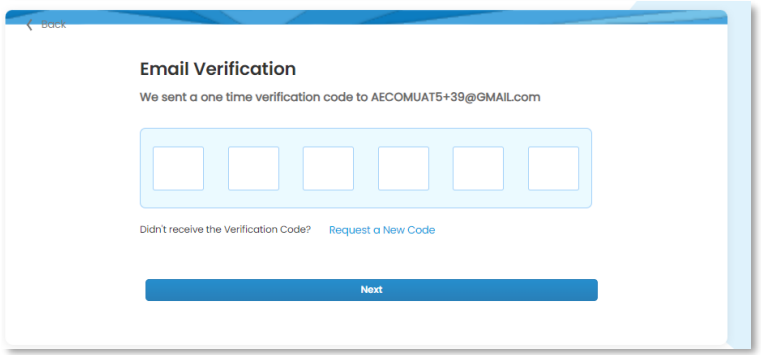
If you have not received this email, check your Spam folder. If you are still unable to find the email, contact your AECOM contact or supplier@aecom.com to check which email address the invite was sent to.

2. **Create your account in CSP** by entering the information required. Click *I accept the Privacy Policy and Terms of Use*. Once you click *Create an Account* you will be sent a Verification code.



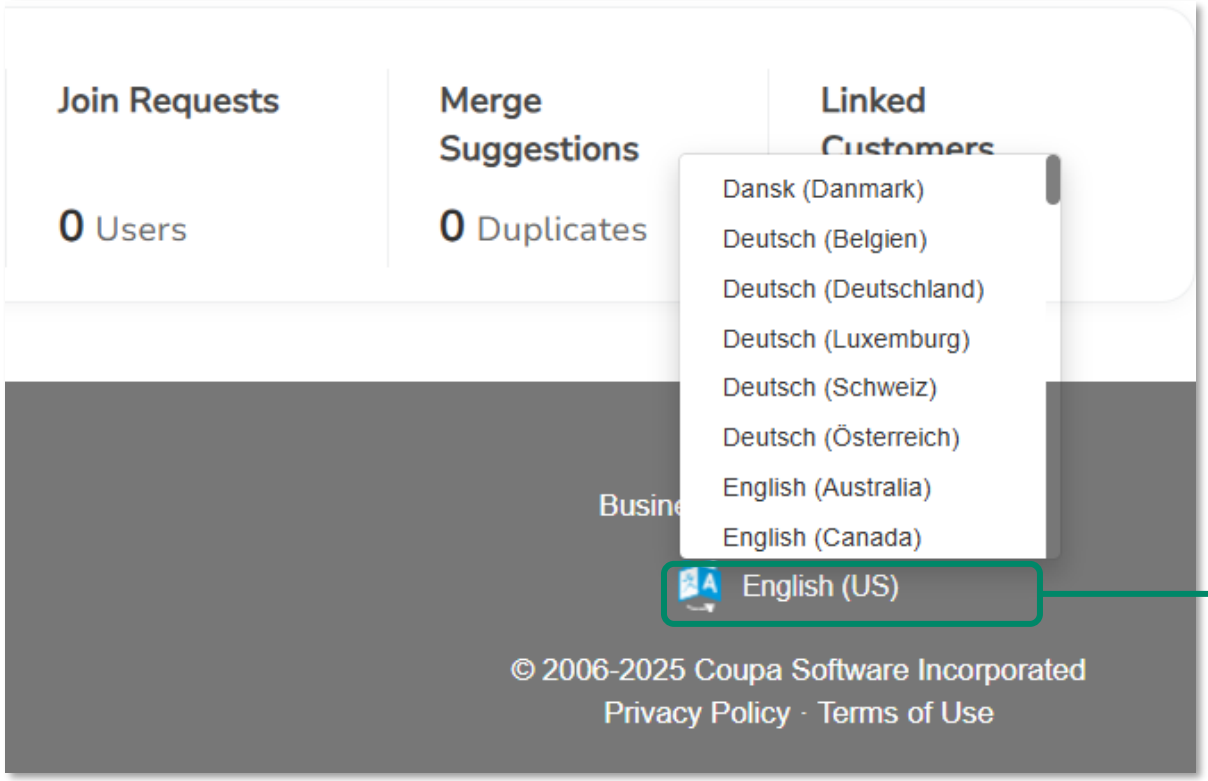
3. **Enter the Email Verification Code** that was sent to your email address and click *Next*. You will be taken to continue setting up your profile.





Updating Language Settings

You can change your language settings by scrolling to the bottom of the screen on any page and selecting from the language's dropdown



Select the Language icon to change the CSP Language

Setting up your profile

Entering your profile information (1/3)

When you first log into Coupa, you will be prompted to set up your profile. Please complete all the fields on the form with the required information.

Please note the important information to be entered in the following fields.

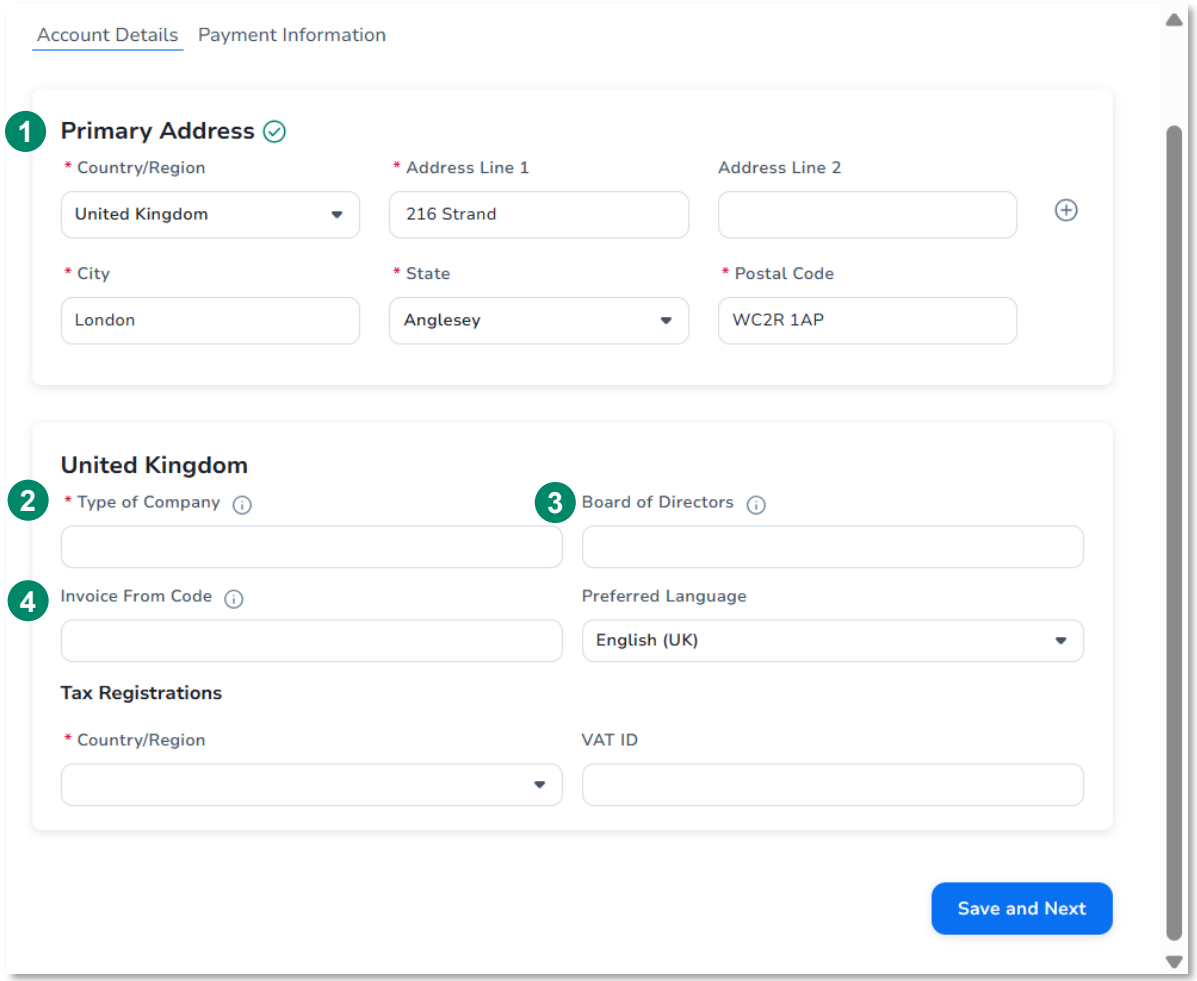
1. Enter your *Primary Address.* This should be your registered main office company address, not a personal address. You can enter addition site or office addresses later.

2. Enter how your company is legally registered in the *Type of Company* field for example whether it is a limited company, a publicly listed company etc.

3. Enter the names of Directors on the Board of your company in the *Board of Directors* field.

4. Use the *Invoice From Code* field to link your CSP invoice address with the corresponding address in your procurement system.

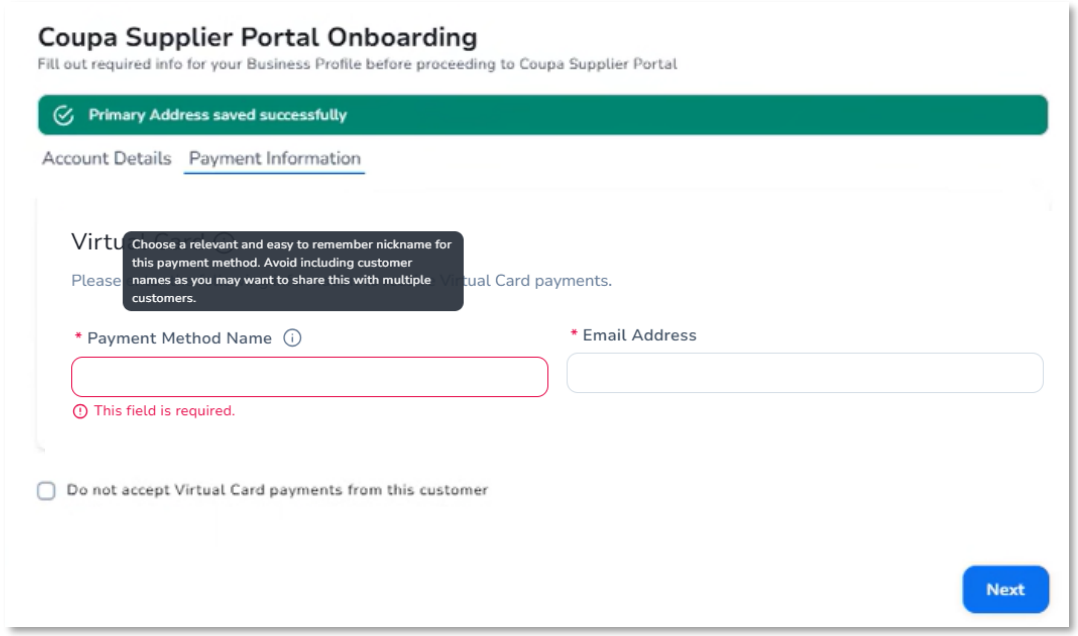
Once all the fields are complete click *Save and Next to continue to the next page*.



Entering your profile information (2/3)

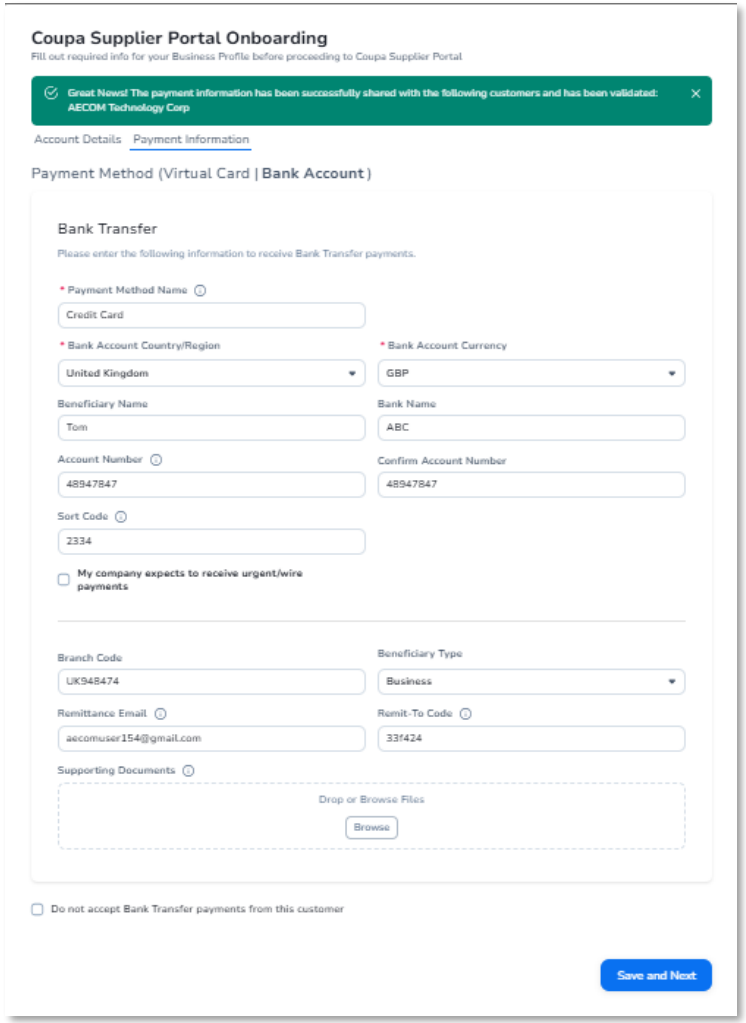
As part of your Coupa profile you will need to enter a payment method.

Enter your *Payment Method Name* and the related *Email Address*. The *Payment Method Name* is only for your reference but should not contain a customer name, as you may wish to share it with multiple customers.



When the fields are complete click the *Next* button to enter the related banking information.

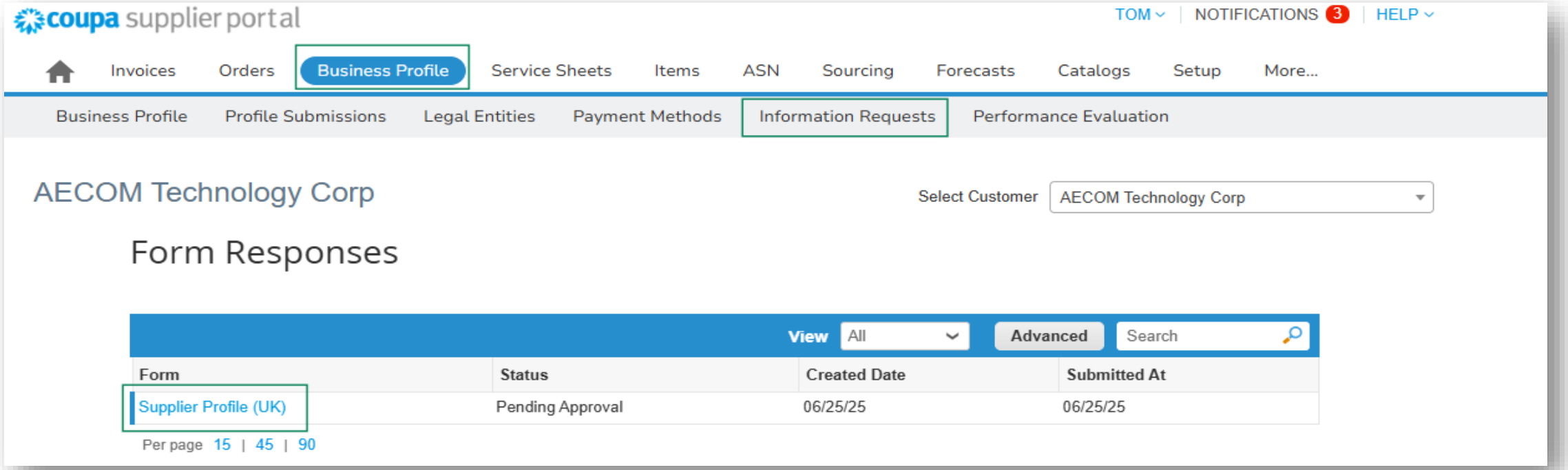
Enter your Banking information and click then click *Save and Next*.



Entering the information required by AECOM (1/3)

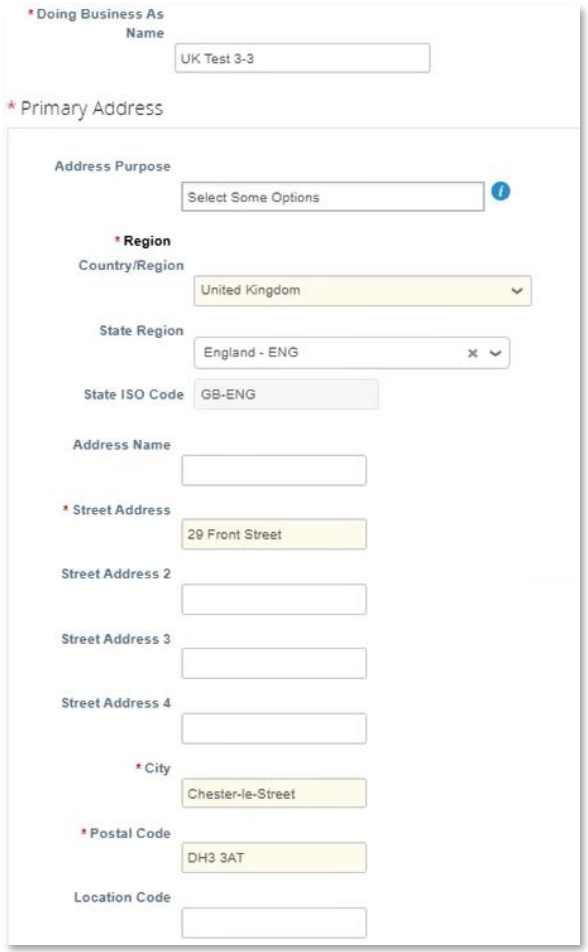
Your Coupa Profile is not accessible to customers by default but can be used to respond to information requests from customers. AECOM will issue Information Requests to you so that you can provide the information required to be set-up as a Supplier. When you are first set-up, AECOM will issue an Information Request to you.

To complete AECOM's Information Request click on the *Business Profile* tab on the home page, then select *Information Requests* on the menu. On the Information Requests page you will see all outstanding information requests that have been sent to you. If you have requests from multiple customers filter to those from AECOM and then select the *Supplier Profile* form.



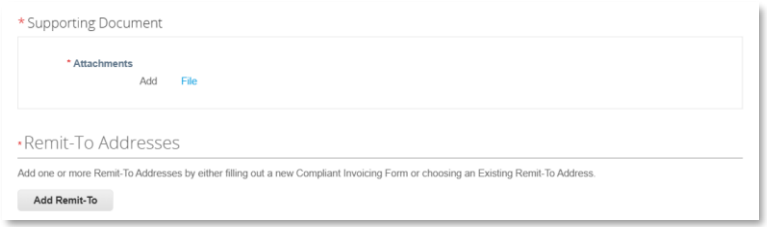
Entering the information required by AECOM (2/3)

1. First provide your *Primary Address* information. This should prepopulate from the information you already provided. Remember this should be your main office, you can add additional sites or offices later.



2. Attach relevant *Supporting Documents* using the *Attachments* option. To be registered as a supplier you will need to provide:

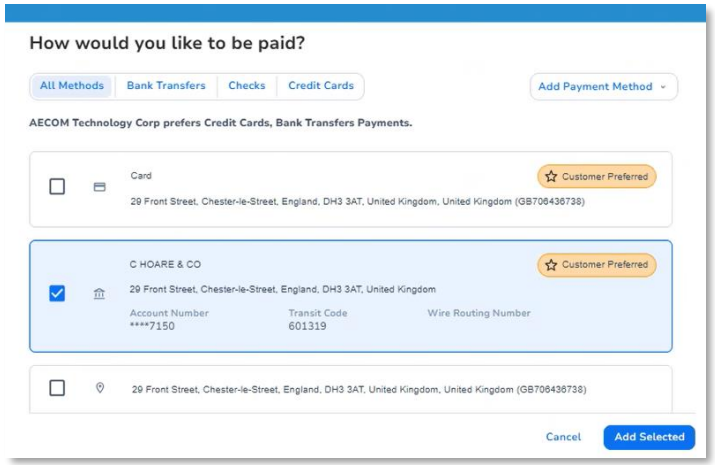
- A copy of a redacted invoice **or** your business details (e.g. legal name, postal address, contact number, web address) on official Company Headed paper, **and**
- a Bank Certificate clearly showing your registration with the bank.

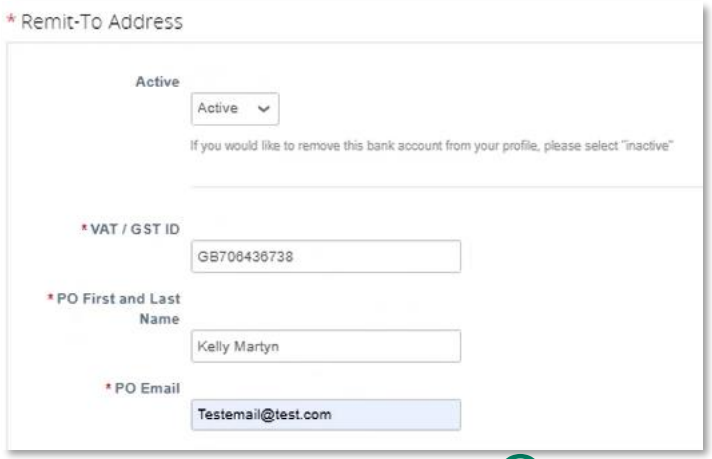


When you have attached the documents click *Add Remit-To*

Please ensure you provide the required attachments to avoid any delays in setting up your profile.

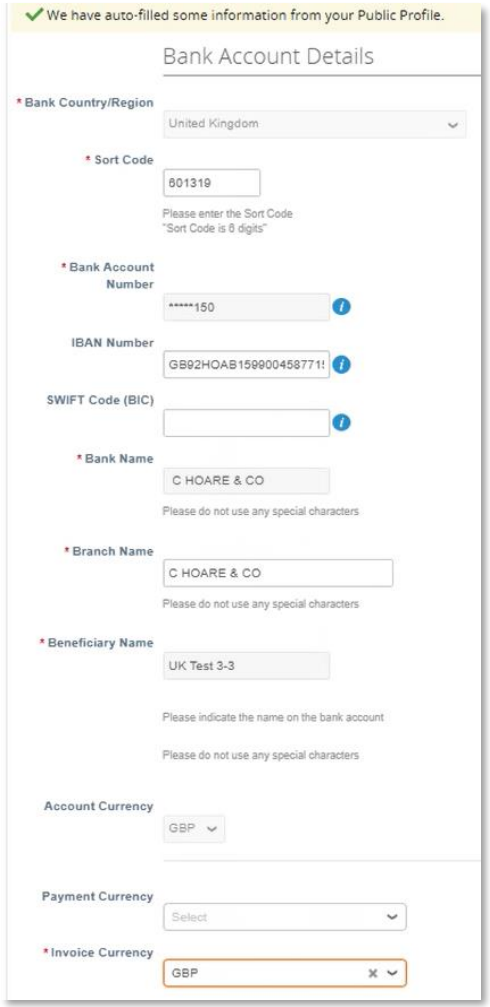
3. Choose your existing bank details to share with AECOM. Select the payment methods then click *Add Selected*. You will be prompted to enter a *Remit-To Address*. (In the case that a new payment method needs to be added, refer to page 13)

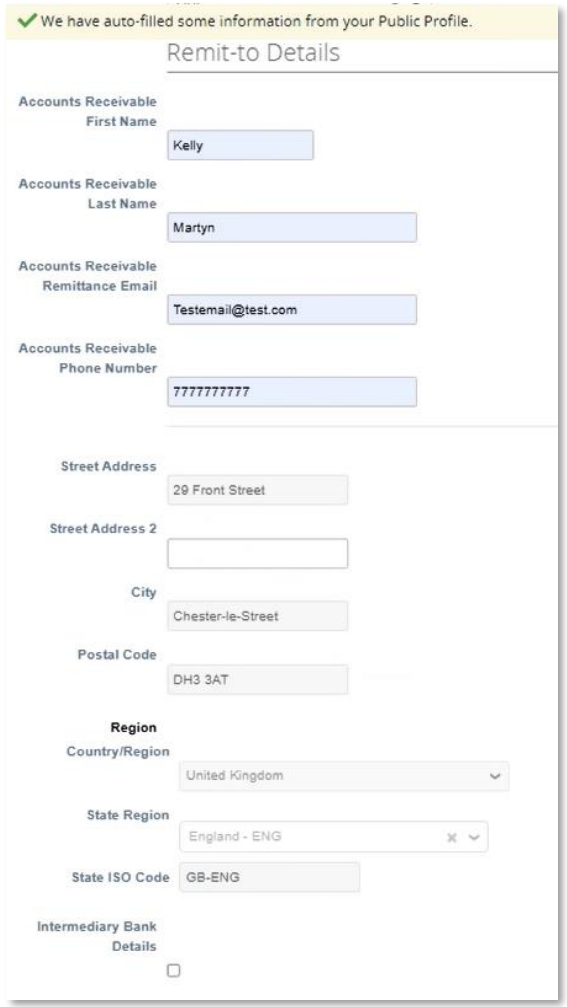




Entering the information required by AECOM (3/3)

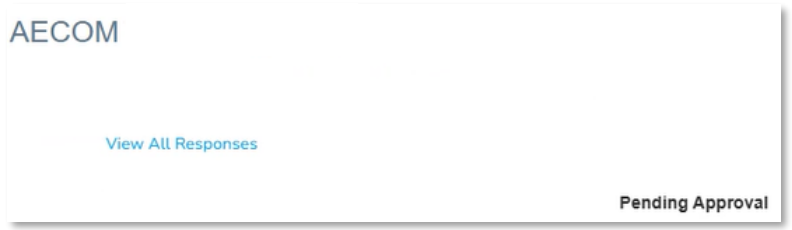
4. Enter the bank details associated with your selected payment methods. These should populate from your Coupa profile. Validate the data being shared.





5. Complete the Information Request by clicking on the *Submit for Approval* button. This will send your information to AECOM to validate.

If the request is submitted successfully, you will receive a notification on screen stating that the request in *Pending Approval.*



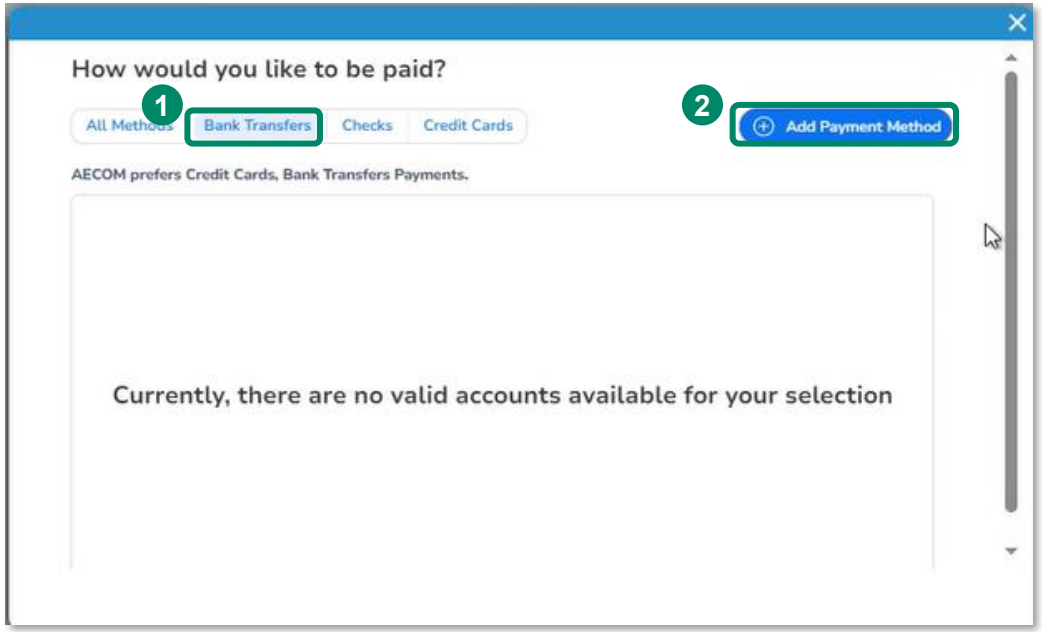
AECOM will review the submitted data. We aim to do this within 15 working days. If there are any issues we will reject the form which will then route back to you for any updates. If the data is all successfully validated, we will contact you to perform anti-fraud checks.

You, or your Accounts Receivable department, may be contacted by AECOM via phone with a request to verbally verify your information for security purposes. It is therefore essential a valid phone number is provided.

To validate the authenticity of this request, or any calls received, please contact us at supplier@aecom.com

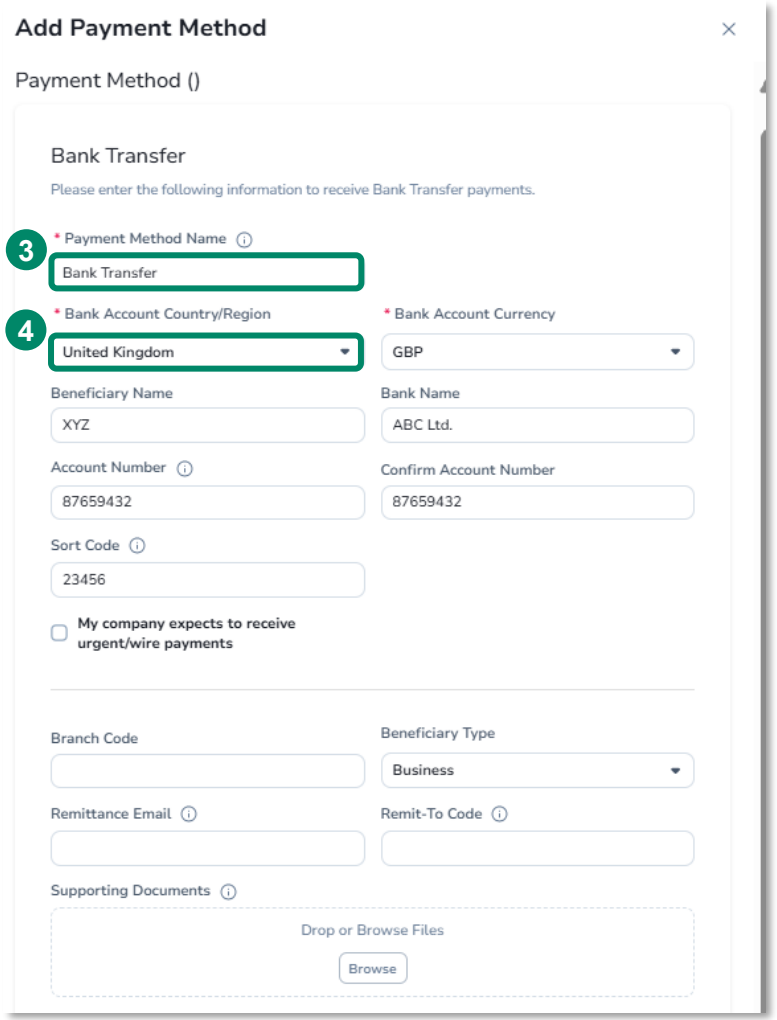
Adding your Payment Method – Bank Transfer

If there are no suitable existing payment methods saved to your CSP account, you will need to set-up a new bank transfer or credit card payment method as part of profile setup.



1. Select relevant payment method to add: AECOM makes payments via *Bank Transfer* or *Credit Card*.
2. Click *Add Payment Method*

Provide the Payment Method Name



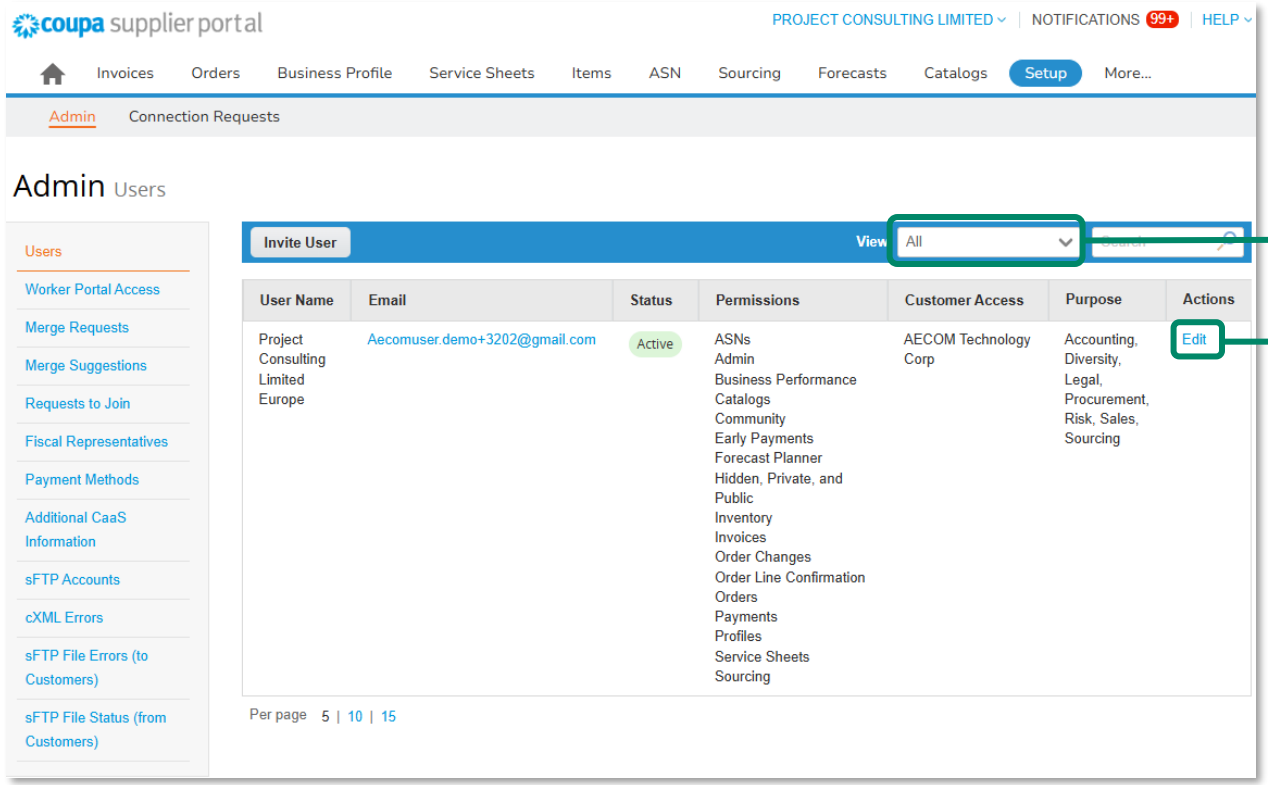
3. Provide the *Payment Method Name.*
   This should not include the customer name (as you may wish to use it with multiple customers)
4. Select the *Bank Account Country/Region* and provide other country specific bank details.
5. Continue your account set-up (see page 12)

Inviting others to join CSP, notifications and language and settings

Inviting Other Users at your Company

After initial account set-up, you can add additional users from your business to the Coupa Supplier Portal. This could include accounts teams, billers, account managers, sales teams or others.

To add a user, navigate to the *Setup* tab on the homepage and then select *Admin* > *Users* from the menu. On the *Users* page you can see and *Edit* a list of existing users or click the *Invite User* button to add new users.

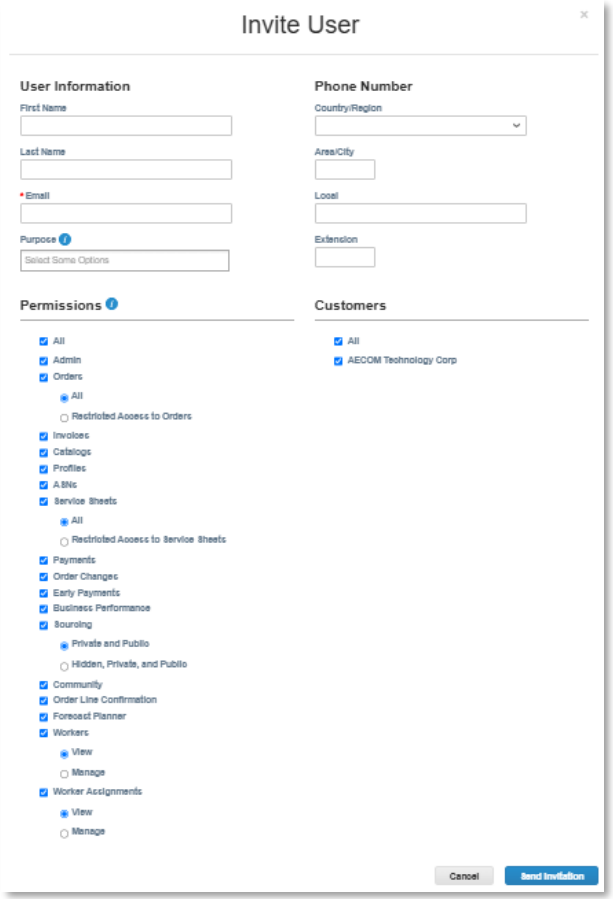


Filter Active , Inactive or Deactivated users by using the *View* dropdown

Click *Edit* to adjust user permissions in the CSP

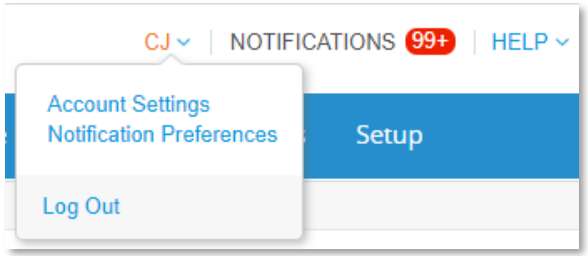
Only users with the Admin permissions set can access and change the CSP Setup. If your company is unable to access the Admin account, Coupa can help regain access. Contact them at supplier@coupa.com

Click *Invite User* to send someone at your company an email to join the CSP. User permissions can be setup on this tab as well.



Updating Coupa Supplier Portal Notifications

You can update your *Account Settings* and *Notification Preferences* by hovering over your username on the top right corner of the CSP home screen.



In the *Account Settings section* you can make changes to your personal information (name, department, role, and password). If you need to edit company information, this is done in the Business Profile section.

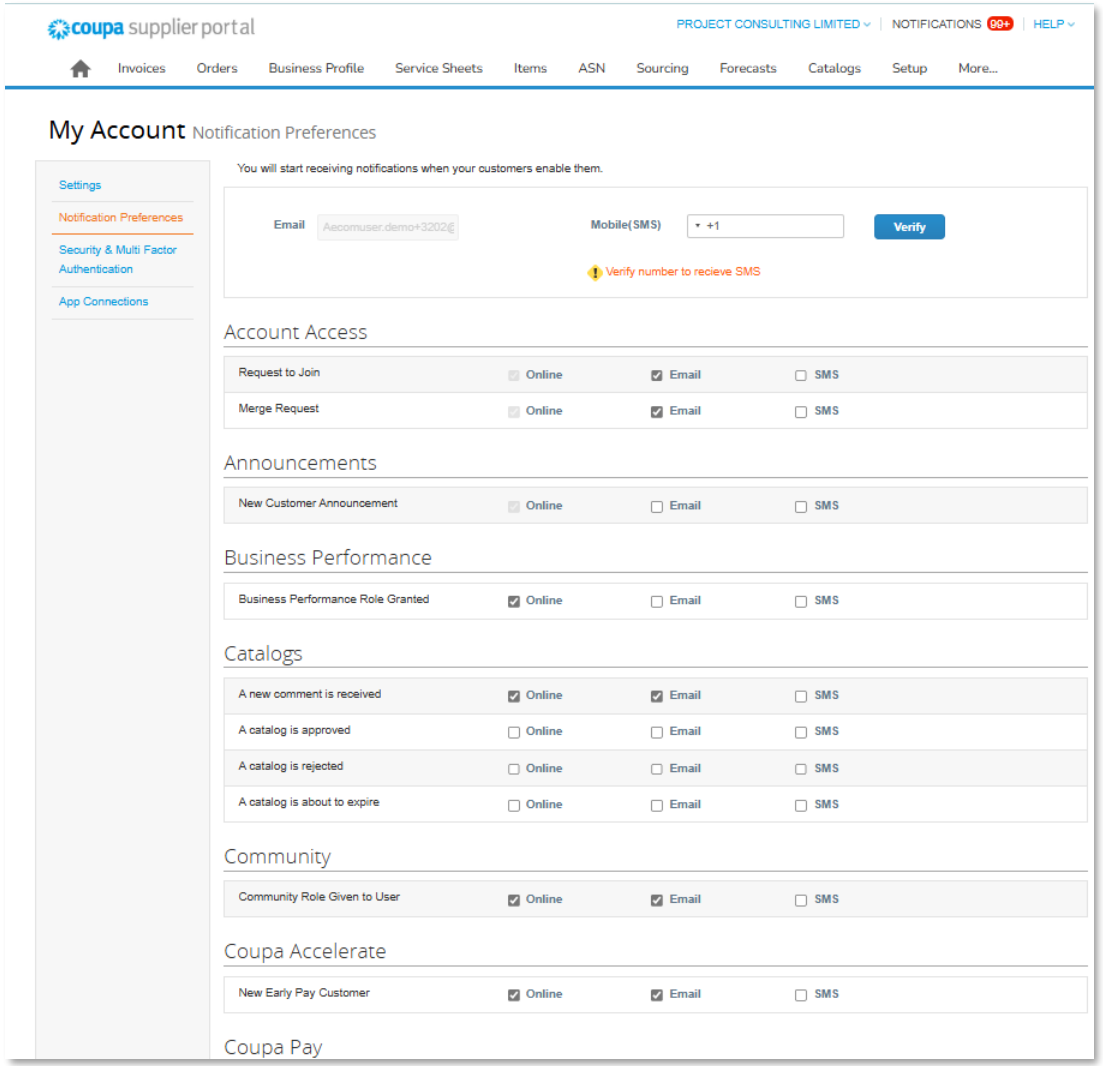
In the *Notification Preferences* section you can edit the notifications you receive. For each type of notification you can choose whether to receive:

– Online notifications within the CSP when logged in

– Email notifications

– SMS notifications

It is important the Email or SMS notifications are enabled for relevant business critical account functions so that you receive timely notification of account issues e.g. if an invoice is disputed, an order is received or cancelled, if information is required from a customer or if information is shared with you.



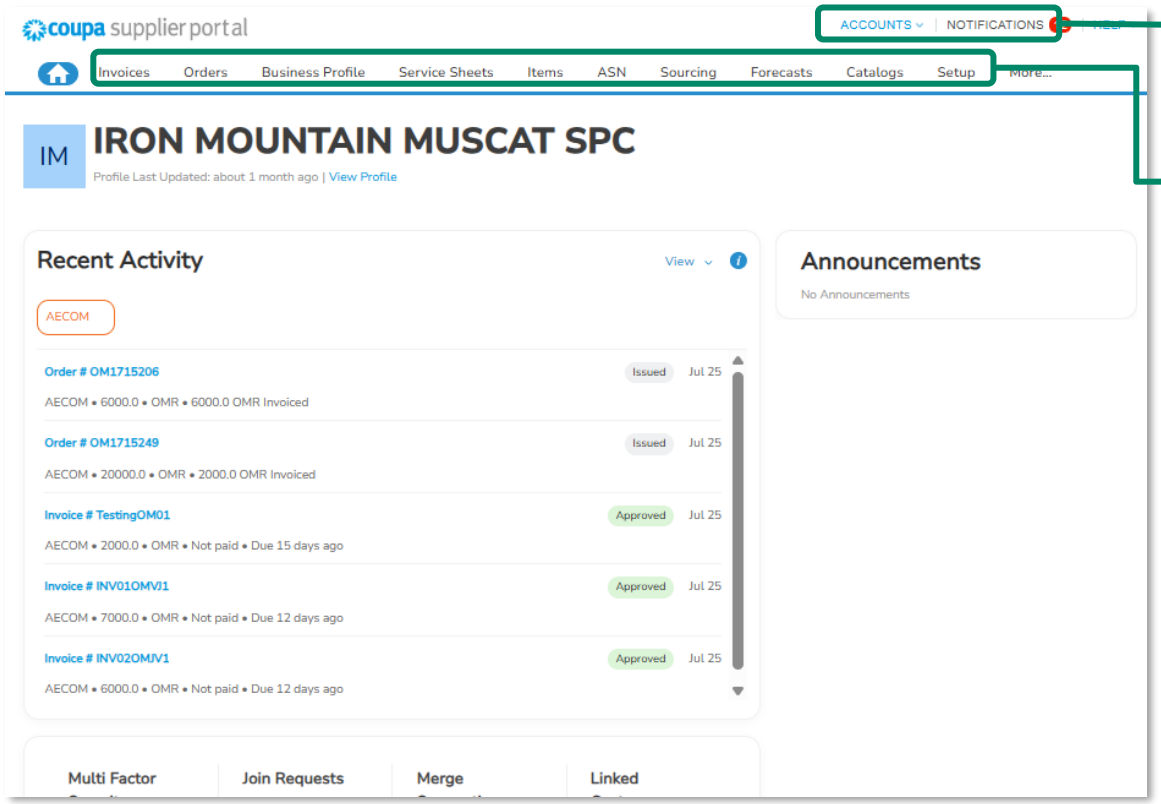
Navigating the CSP once you have created your account

How to Login to your Coupa Supplier Portal

Once your account is created, you can login to the Coupa Supplier Portal at https://supplier.coupahost.com/sessions/new

Each user should login with their own credentials. If needed users from your company with *Admin* permissions can Invite Other Users.

Your Coupa Supplier Homepage will look something like this:



The top right sub-menu provides access to Account Settings and Managing Notifications, access to view online notifications and access to the Help menu.

The tab bar provides access to the main features of the Coupa Supplier Portal. From this section users can access the *Invoices* section to manage invoices, the *Orders* section to view and manage POs and the *Business Profiles* section to manage your company information and respond to information requests. Admin users can also use the *Setup* option to manage users for their company.

Coupa Supplier Portal is free to use, and AECOM does not require you to buy any add-on's to use the portal.

However, Coupa is a third party and do offer a range of paid products to suppliers which can be heavily promoted by Coupa within the Supplier portal.

AECOM **does not** require you to buy any of Coupa's optional add-ons. Unfortunately, we cannot restrict Coupa's promotions within the CSP. If you have any issues or complaints regarding these products, please contact verified@coupa.com for further support.

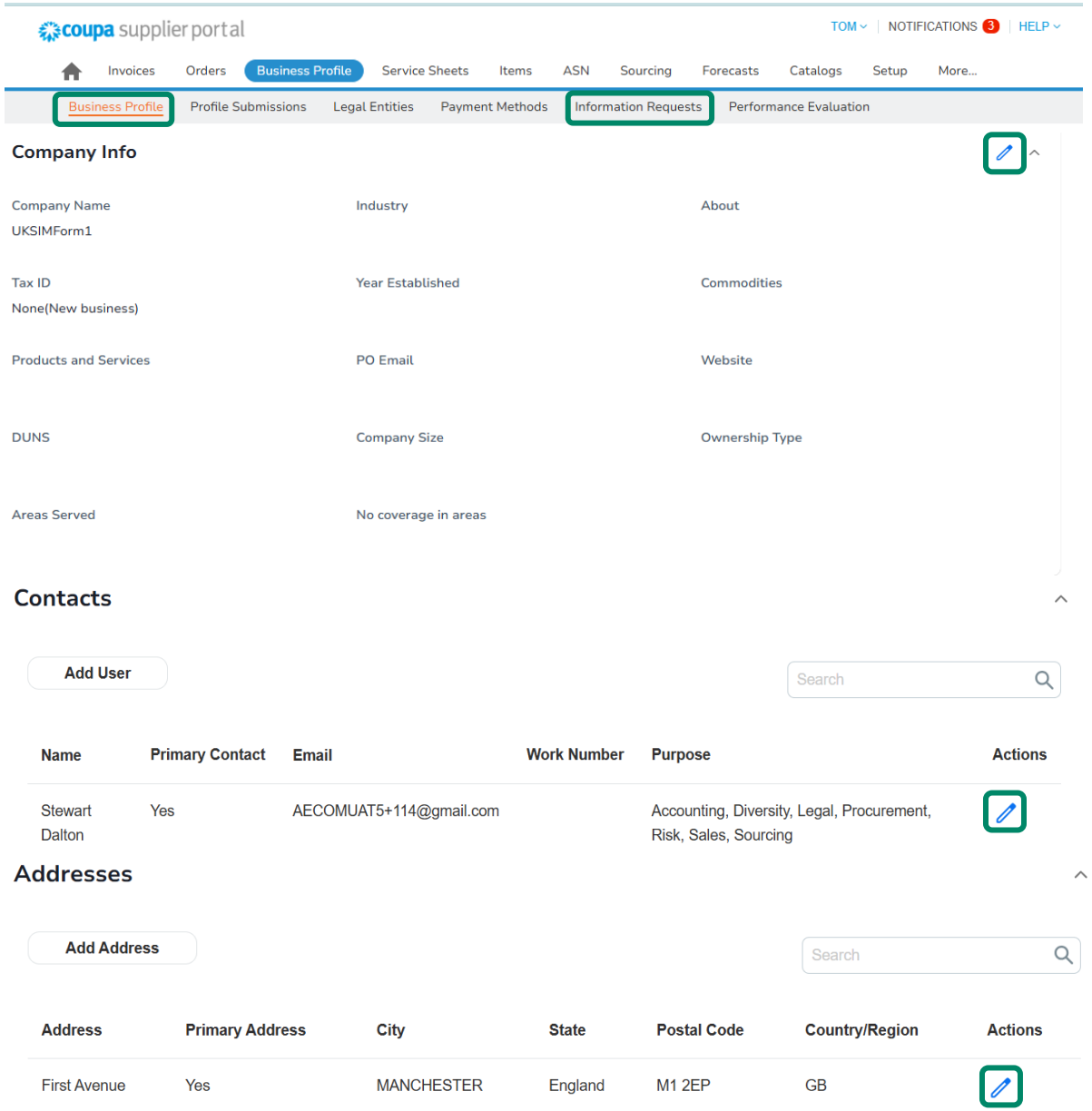
Updating your CSP supplier profile

- To update your basic CSP profile, please click on *Business Profile* tab on the Coupa homepage.
- Select the *Business Profile option* on the sub-menu to update basic company and contact information in the *Company Information*, *Contacts* and *Addresses* sections.
- Click the *pencil icon* in the sections to make edits to the fields visible in the screenshots and then save those changes.

NOTE:

Updating your CSP supplier profile does not send updates to AECOM automatically.

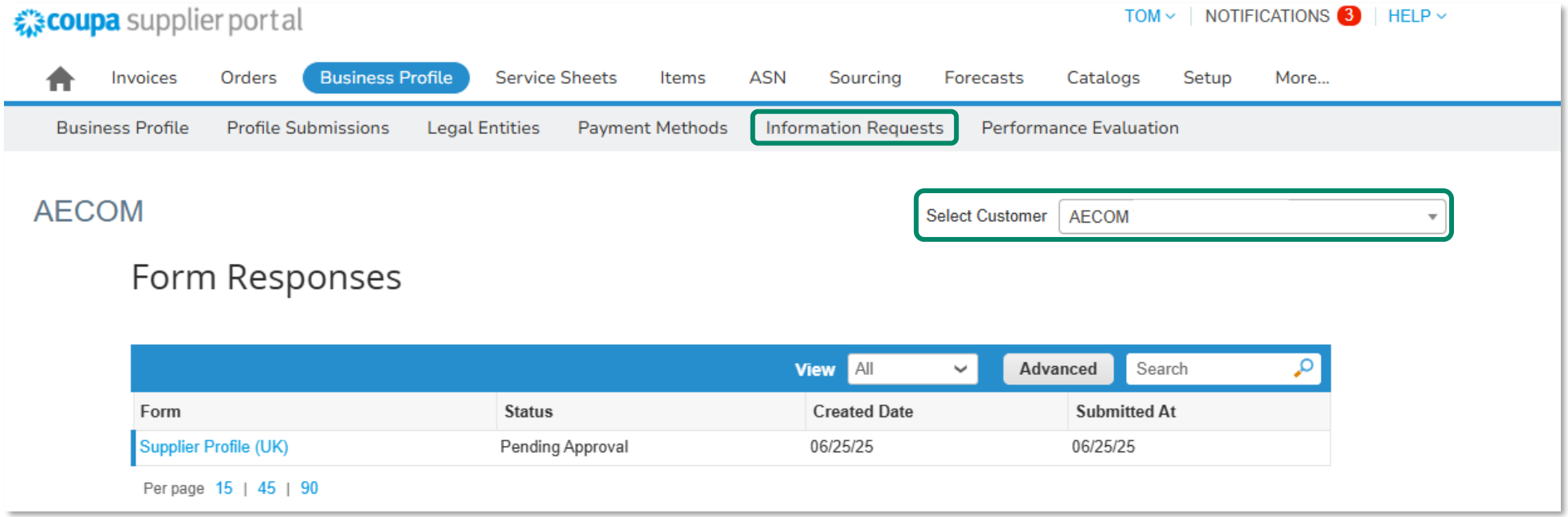
If you need to make changes to the data AECOM holds contact supplier@aecom.com and have a new *Information Request* sent (see next slide).



Updating and completing AECOM's supplier information requests

Update requests can be sent to suppliers after they have been onboarded in the CSP. By default notifications will be sent by email and in the CSP when Information Requests are sent.

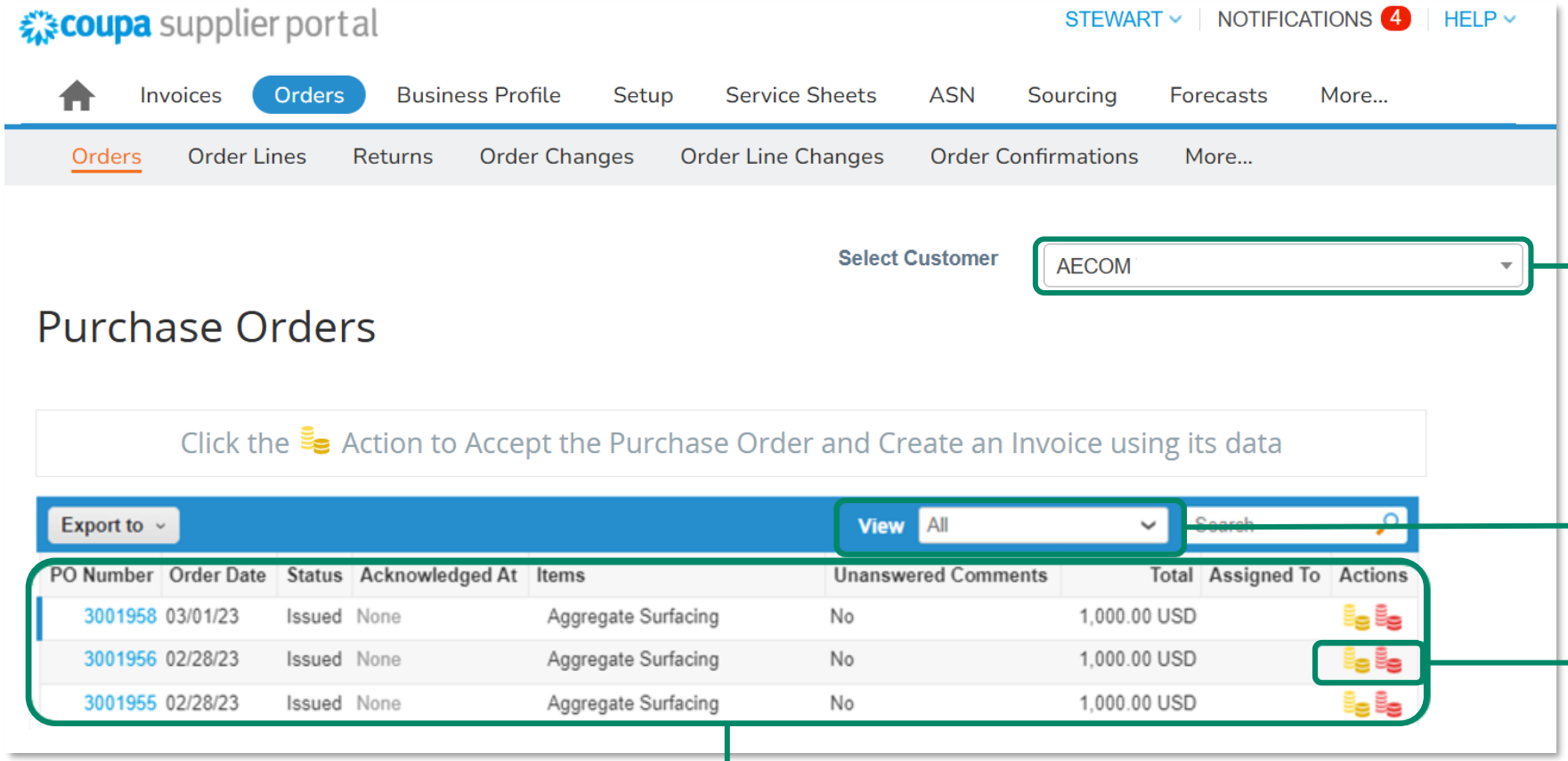
Supplier Information Requests sent from AECOM can be completed and submitted by clicking on the *Business Profile* tab on the home page, then selecting *Information Requests* on the menu. On the Information Requests page you will see all outstanding information requests that have been sent to you. If you have requests from multiple customers filter to those from AECOM and then select the *Information Request* form(s).



Managing Purchase Orders

Managing Purchase Orders (1/3)

When you have a new order from AECOM, a purchase order will be sent to you. By default you will be notified of new purchase orders and changes to orders with email and online notifications, although you can change these notification settings. Purchase orders (POs) sent from AECOM can be seen and managed by going to the *Orders* tab.



If your company works with multiple customers on the CSP, you can filter with the *Select Customer* dropdown

Views can be set to see specific types of orders (i.e. open orders, orders past due, etc.)

The *Actions* icons allow easy creation of invoices or credit notes against an order. Use the:

- *Yellow Coin icon* to create an invoice
- *Red Coin icon* to create a credit note

The list of purchase orders shows key information about each order. Clicking on the *PO Number* will open detailed information about the purchase order (see next page)

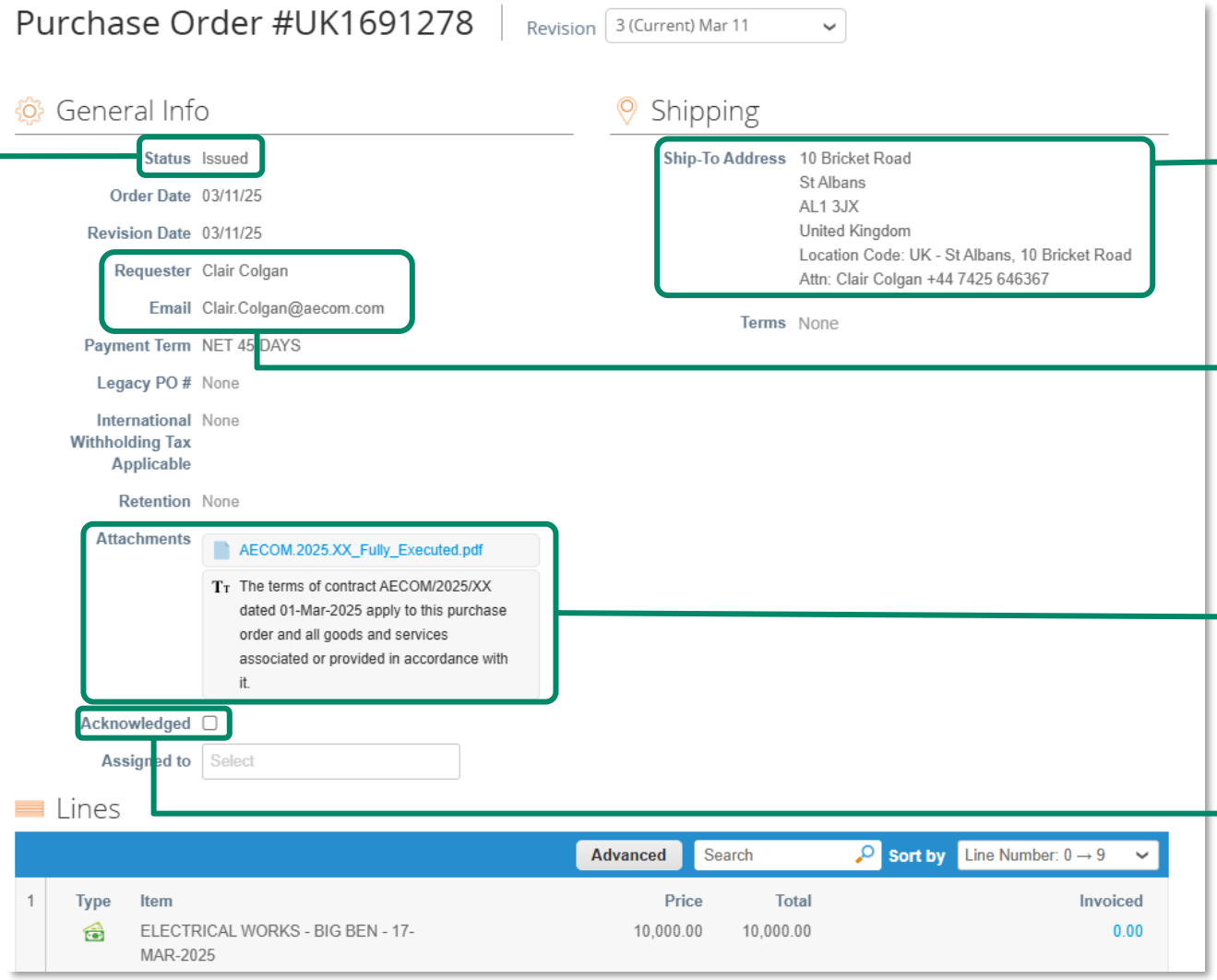
Managing Purchase Orders (2/3)

Clicking on the *PO Number* in the *Orders* tab will open detailed information about the purchase order.

The *Status* field shows the status of the order. The status will normally be one of the following:

Status	Description
Issued	The PO was approved and sent to Supplier.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Cancelled	The PO is cancelled and does not need to be fulfilled.

If you have a PO in the Coupa Supplier Portal that has a status of *Soft Closed* or *Cancelled* and you expected the PO to be open, please contact the *Requestor*.



Ship-To Address: For goods this is the delivery address and for services this is where the work is performed.
For Goods orders a name and phone number to be shared with the Courier should be provided

Contact the *Requestor* using the name and email provided with any queries.

Reference to contract terms and attached contract document (for confidential contracts only the contract reference will be included, and the contract will be sent separately via secure communication)

Once you have reviewed the PO please acknowledge receipt using the *Acknowledged* tick box.

Managing Purchase Orders (3/3)

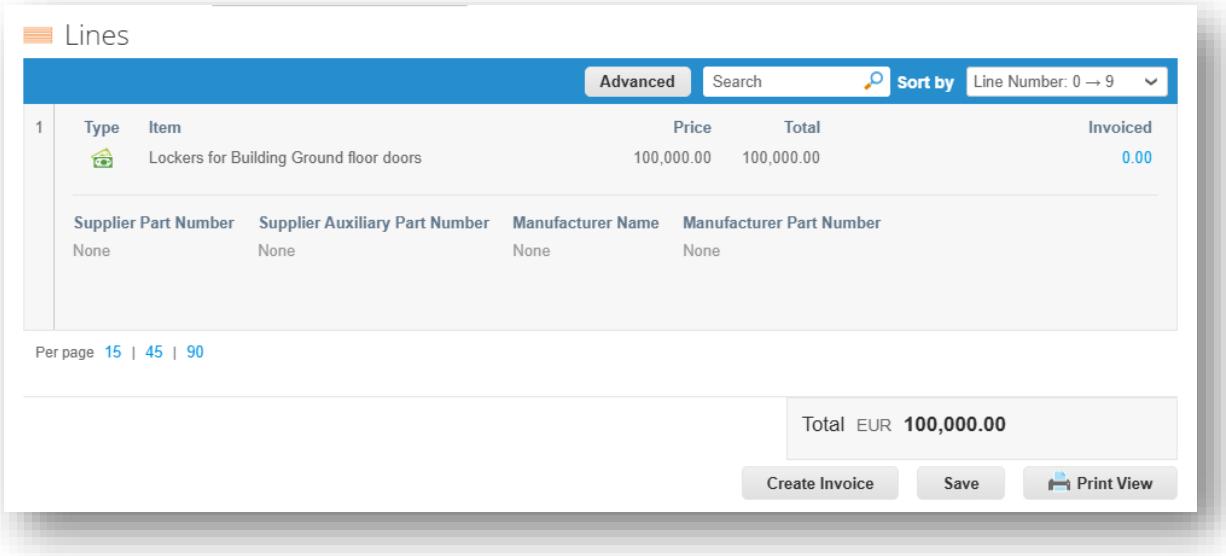
The *Lines* section shows the *Items* included in the order, the agreed or maximum *Price* and any amount already *Invoiced*.

Additional information may be included below each line based on the type of order being placed.

Invoices should reflect the same line structure and currency as given in the PO.

Generally, each PO can be invoiced independently upon despatch of goods, or on the agreed invoicing schedule for services. Invoices can be initiated directly from the Purchase Order detail view using the *Create Invoice* button, or using one of the Invoicing options set out in the Invoicing section.

As it is not possible to raise an invoice for more than the total *Price* of a line on a PO, any changes to *Prices* should be discussed in advance with the *Requestor*, and a PO change requested.



Invoicing

Invoicing Options

AECOM supports five methods of invoice submission by suppliers:

- **Submitting invoices from an emailed Purchase Order**
  Suppliers who have a small number of orders may find it convenient to invoice by clicking a link on the purchase order in their mailbox. Coupa will generate an invoice automatically based on the data in the purchase order ready for review and submission.
- **Submitting a PO or Non-PO invoice in the Coupa Supplier Portal**
  Most suppliers will find it beneficial to use the Coupa Supplier Portal to manage their purchase orders, invoices and payments. Invoices can be managed in the *Invoices* tab in the portal.
- **cXML Invoicing**
  cXML Invoicing is a form of digital invoicing enabling large volumes of invoices to be managed and exchanged between customers' and suppliers' financial systems. Coupa can receive cXML invoicing but must be pre-configured for each supplier. High volume suppliers who are not currently configured for cXML invoicing can contact supplier@aecom.com to discuss this option further.
- **Invoicing via Government Portal**
  Coupa can receive invoices via Government Invoice Portals in countries where e-invoicing applies, and invoices are mandatorily processed through a Government Portal (e.g. Romania, Italy).
- **Invoicing by exception**
  By exception, and at AECOM's discretion, AECOM will also support consolidated invoices from high volume suppliers and other forms of invoicing where technological or practical issues prevent suppliers invoicing in Coupa. Suppliers need to meet specific criteria to be eligible for invoicing by exception. Contact supplier@aecom.com if you believe this is relevant to your business.

Managing Invoices: Invoice Attachments & Common Issues

AECOM has implemented a range of automated invoice checks in Coupa to help smooth the invoicing process. You should you be aware of the following invoice requirements to avoid delays to your invoice processing and payment:

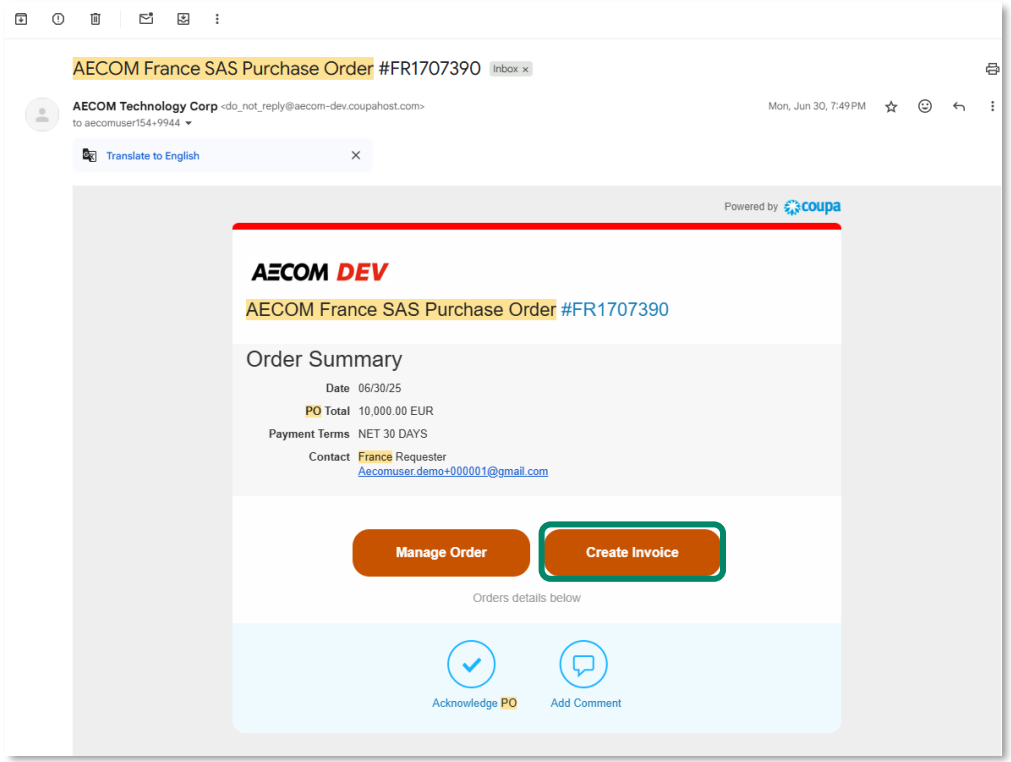
- Many invoices require backup documents. These may be required to provide invoice backup to our clients or for audit purposes. Copies of the invoices/attachments are not mandatory in all cases, but if your contract requires you to provide backup ensure it is provided otherwise the invoice will be disputed.
- Invoices are subject to automatic tolerance checks. If the invoice exceeds any tolerances set by AECOM, the invoice will be automatically disputed immediately after submission. You will usually receive warnings if your submission is out of tolerance before submission. Frequently issues arise with:
  - The invoice must be uploaded within 5 days of being generated. If the invoice is submitted more than 5 days after the invoice date the invoice will be automatically disputed. It is also important that the invoice date matches the date on any supporting documents from the supplier's financial system.
  - PO backed invoices cannot exceed the *Price* stated for each line on the PO. If you need to invoice more than the PO price you will need to request a PO change from the *Requestor* prior to invoicing.
  - The correct AECOM entity, entity address and *Buyer Tax ID* should be included in the *To* section. These should be detailed on your PO or contract.
  - The Tax rate selected must match the product type and the Invoice From, Ship From, Remit To addresses and Ship To Address.

Invoicing:Submitting invoices from an emailed Purchase Order

Submitting invoices from an emailed Purchase Order (1/4)

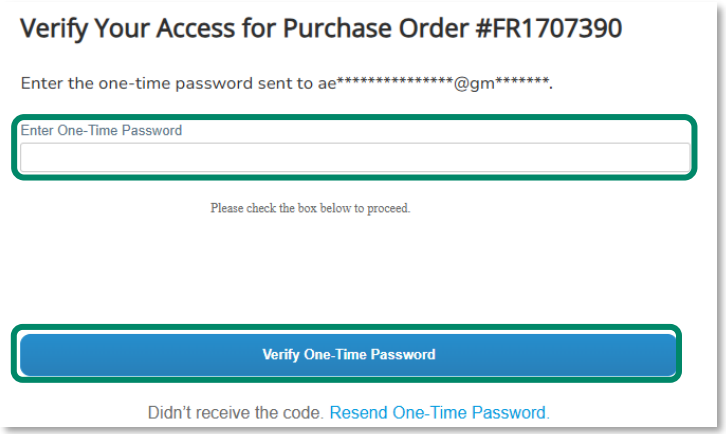
Suppliers who have a small number of orders may find it convenient to invoice by clicking a link on the purchase order in their mailbox. Coupa will generate an invoice automatically based on the data in the purchase order ready for review and submission.

1. Open the Purchase Order email and select the Create Invoice button to start the invoicing process.



2. Generate and enter a One-Time Password. When you click the Create Invoice button, a One-Time Password is sent to your email, and you will be taken to the One Time Sign On page.

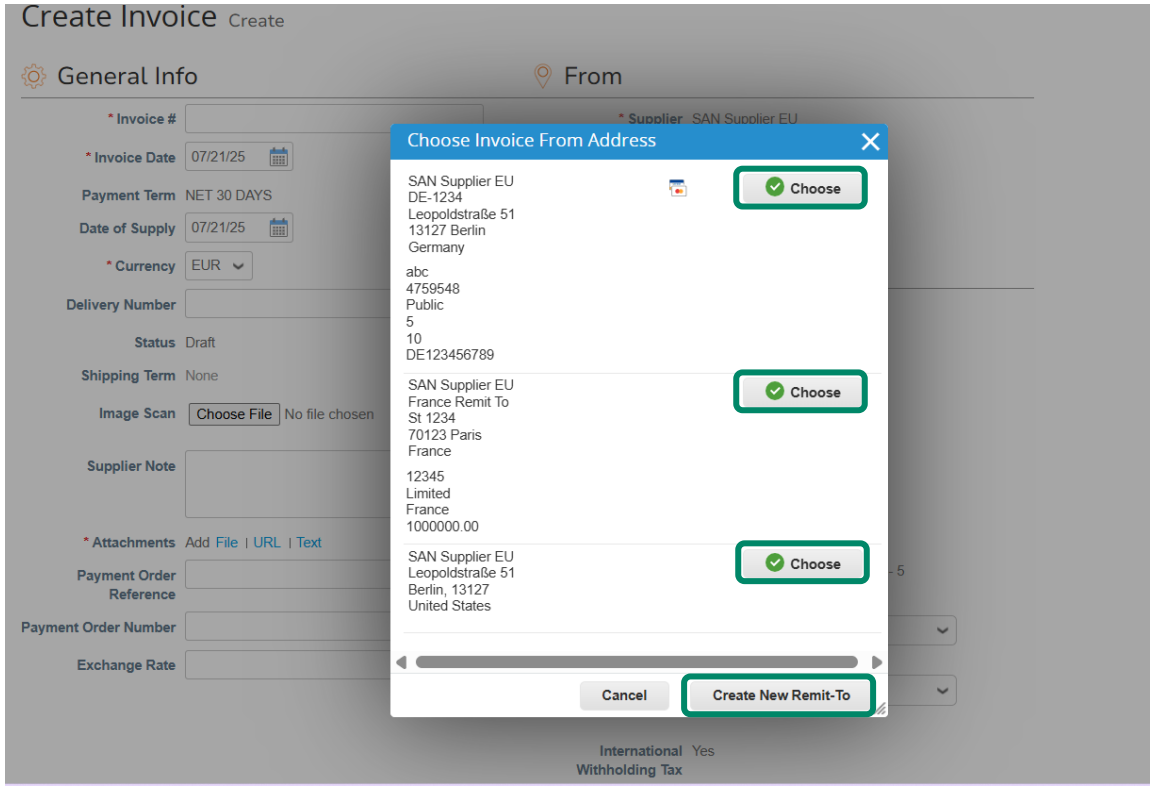
Fill the password sent to your email in the *Enter the One-Time Password* field, then click on *Verify One Time Password*



Submitting invoices from an emailed Purchase Order (2/4)

After you click on Verify One-time Password, the *Create Invoice* page will appear.

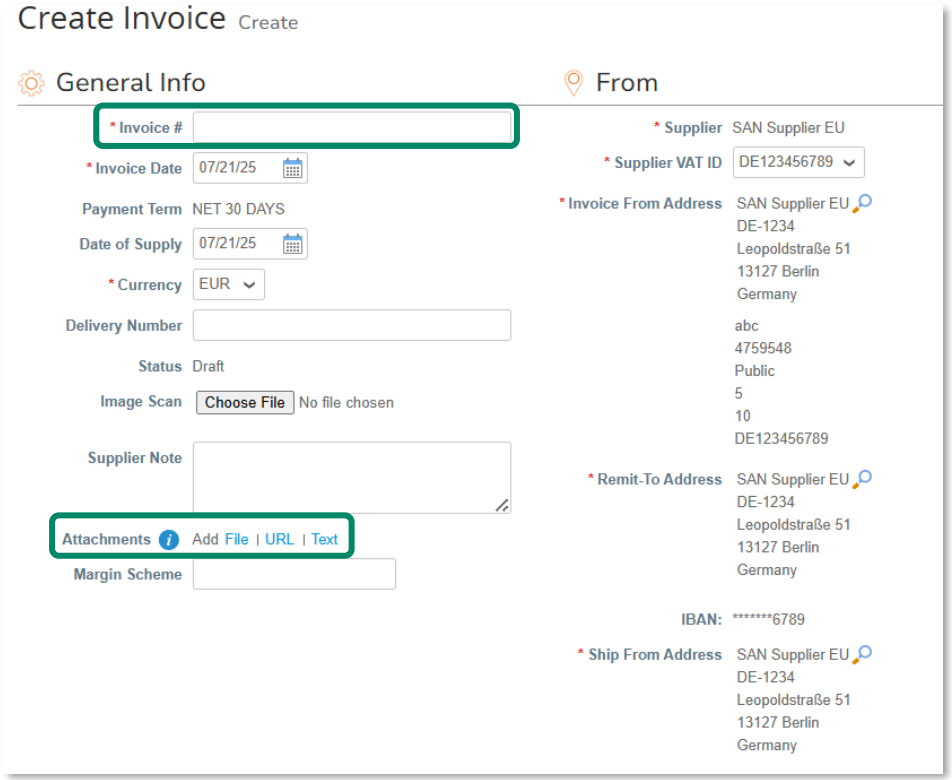
3. Choose Invoice From Address. In the pop-up, select *Choose* next to the correct Remit-To address for this invoice. If the correct Remit-To address doesn't appear, you can create a new Remit-To address by selecting *Create New Remit-To*



Note: The pop-up on this screenshot is only applicable to suppliers that are processing emailed POs and suppliers not registered on the CSP

4. Review and complete the information The Create Invoice form will pre-populate based on the PO. Enter your invoice number in the *Invoice #* field and then confirm the other data, especially the *Currency* and information in the *From* section.

If you are required to provide backing information to support your invoice, you should attach it in the *Attachments* section.

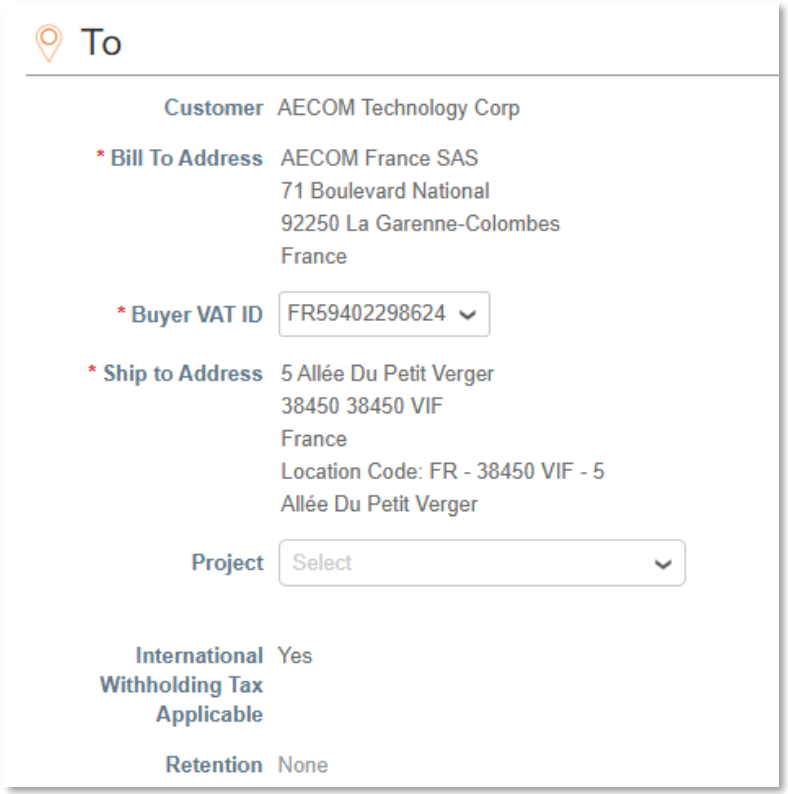


Submitting invoices from an emailed Purchase Order (3/4)

Scroll down the *Create Invoice* page to continue validating the pre-populated information.

5. Check Customer and Tax Details. In the *To* section, ensure the correct *Buyer VAT ID* is selected from the choices in the dropdown. Check that the information for Retention and International *Withholding Tax* is correct. Contact the *Requestor* named on the PO for any questions.

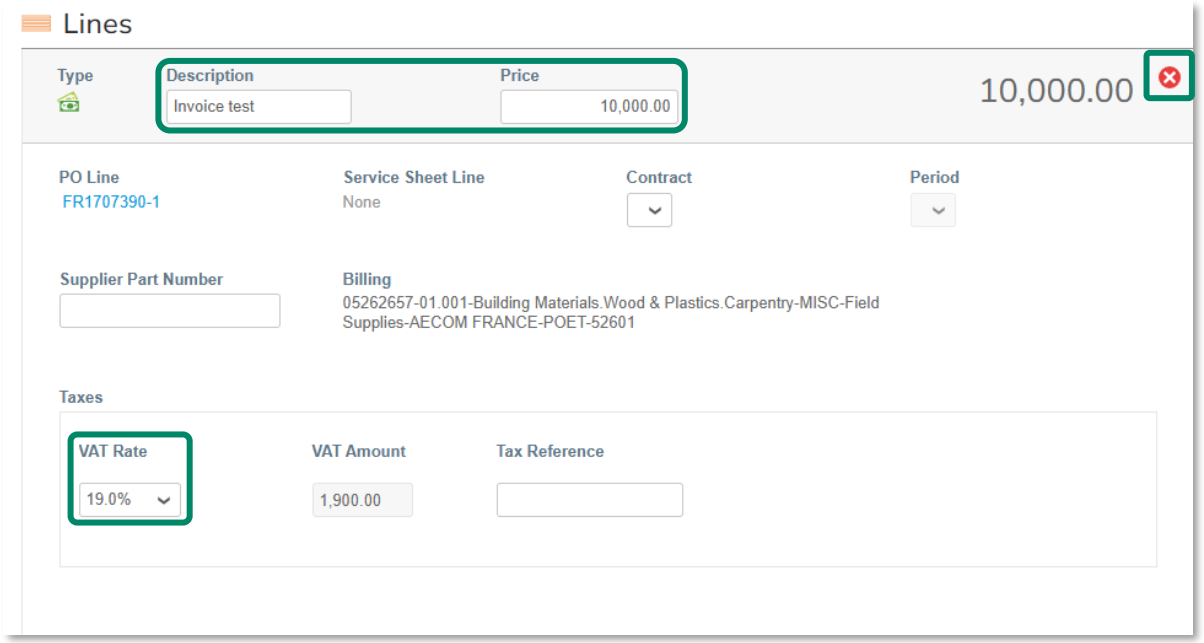
For a non-PO invoice enter the email of your AECOM contact who should receive the invoice to review in the *Requester Email* and *Requester Name* fields.



6. Validate and update the invoices lines. If you are part invoicing a line, confirm or update the *Description* and *Price* as needed to represent the portion included on this invoice. Remember that you can't exceed the purchase order price. If needed contact the Requestor named on the PO to request a PO change order.

If there are any lines you are not including, delete these zero lines by clicking on the red cross icon.

Select the *VAT Rate* that applies to the line. Lines cannot contain items with mixed VAT rates.

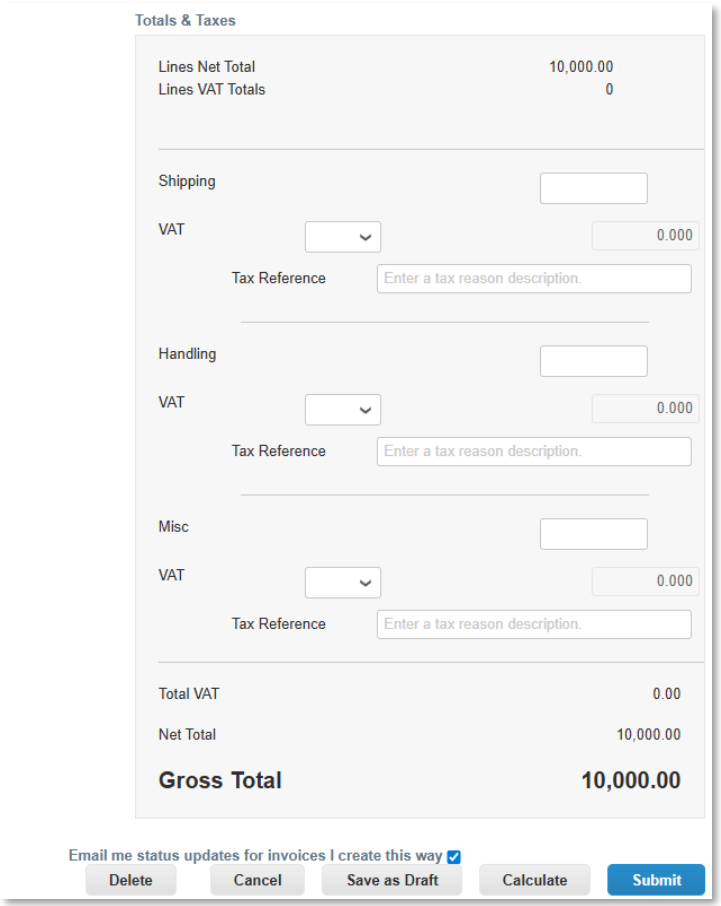


Submitting invoices from an emailed Purchase Order (4/4)

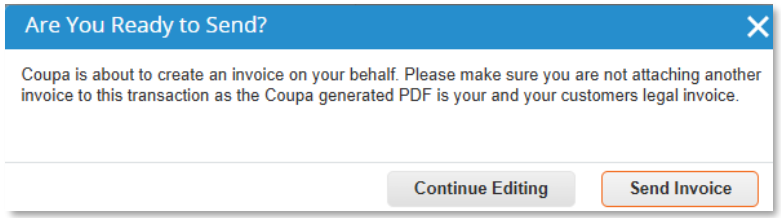
Scroll down the *Create Invoice* page to continue validating the pre-populated information.

7. Review any shipping or handling charges that apply then submit.
If your contract allows for shipping or handling charges, enter these here.

Before you submit the invoice use the *Calculate* button to confirm the Tax that will be applied to the invoice. Once you are satisfied, press the *Submit* button.



8. Confirm Submission. As a final step Coupa will ask *Are You Ready to Send*. Note the comment that when you hit Send Coupa will generate a legal invoice on your behalf, containing the information you have reviewed and provided. When you are satisfied press *Send Invoice* to send to AECOM.



When you Send the Invoice it will go through invoice tolerance checks, and if successful will be sent directly to the Requestor to approve.

You should monitor for further updates in case the invoice fails the automatic tolerance checks, queries are raised, or the invoice is disputed. You will also get notifications of invoice approval.

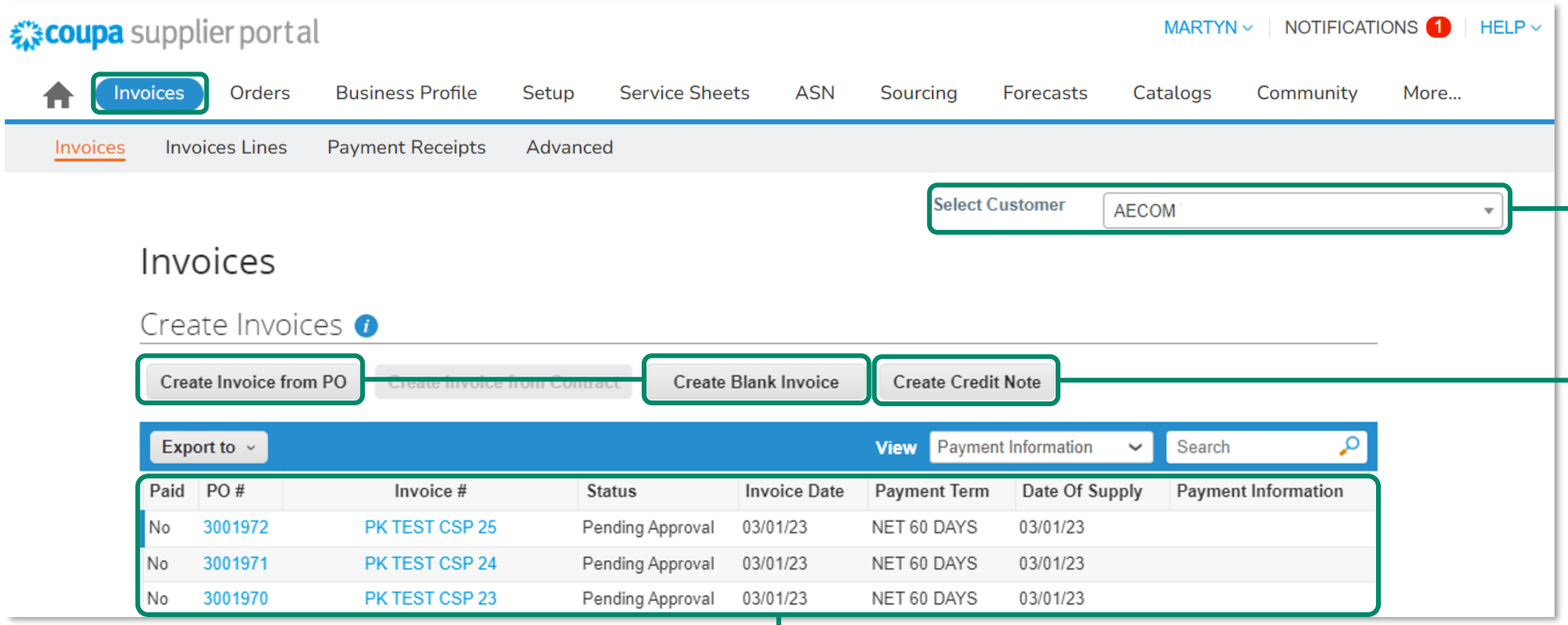
Once the invoice is approved then the invoice will be queued for payment in line with the payment terms detailed on the Purchase Order. You can see this status in the detailed invoice information section in the CSP.

By default, you will be emailed all invoice and payment updates, but you can change your Notification settings.

Invoicing:Submitting invoices from the Coupa Supplier Portal

Submitting invoices from the Coupa Supplier Portal (1/4)

Most suppliers will find it beneficial to use the Coupa Supplier Portal to manage their invoices and payments. Invoices can be managed in the *Invoices* tab in the portal. If you have been issued with a Purchase Order (PO) then the invoice should be created from this PO. Blank invoices can be created if you don't have a PO.



If your company works with multiple customers on the CSP, they can be selected via the dropdown

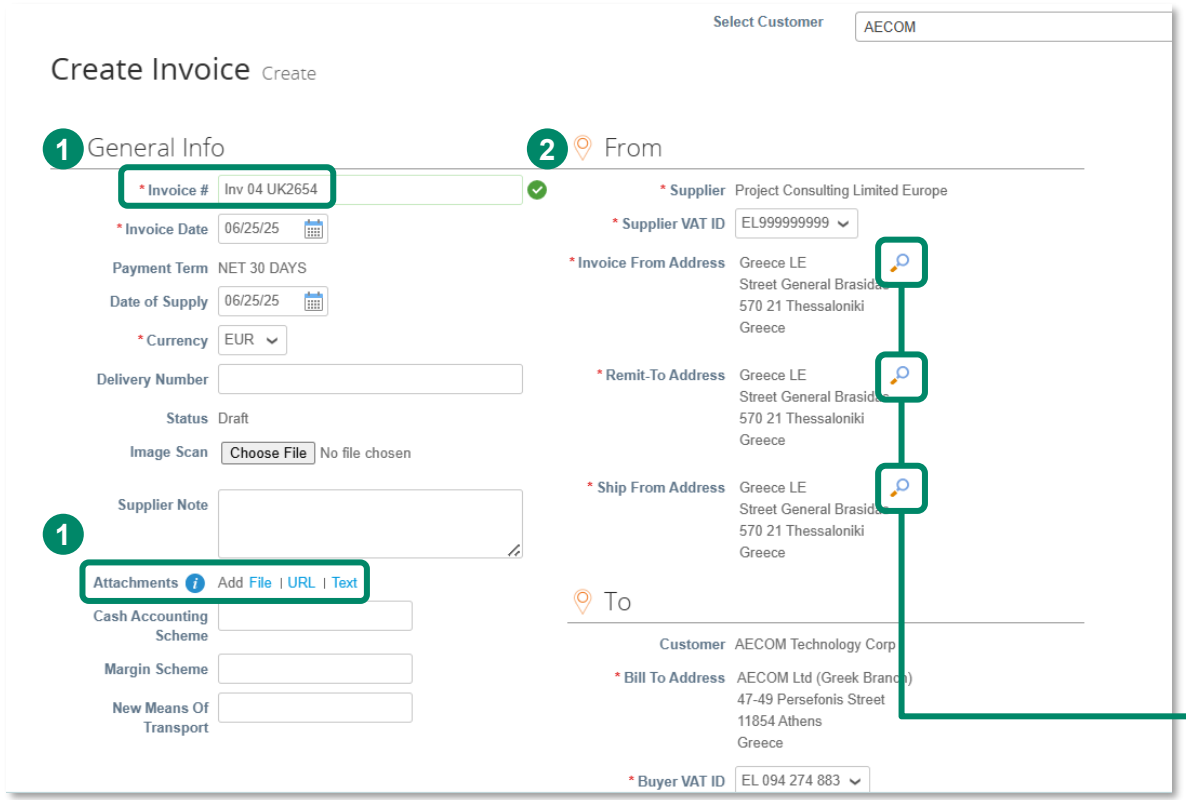
Use the button to initiate new invoices and credit notes:

- If you have a PO use the *Create Invoice from PO* button to create an invoice
- To create a Non-PO backed Invoice, select *Create Blank Invoice*
- To create a Credit Note for an existing PO, select *Create Credit Note*

The list of invoices shows key information about each invoice.
Clicking on the *PO #* will open detailed information about the purchase order associated with the invoice.
Clicking on the Invoice # allows you to see detailed information about the Invoice.

Submitting invoices from the Coupa Supplier Portal (2/4)

The process for creating an invoice in the Coupa Supplier Portal is similar whether you have a PO or not, and starts with the *Create Invoice* form. The main difference is that invoices created from a PO pre-populate based on the data in the PO.



1. Review and complete the information

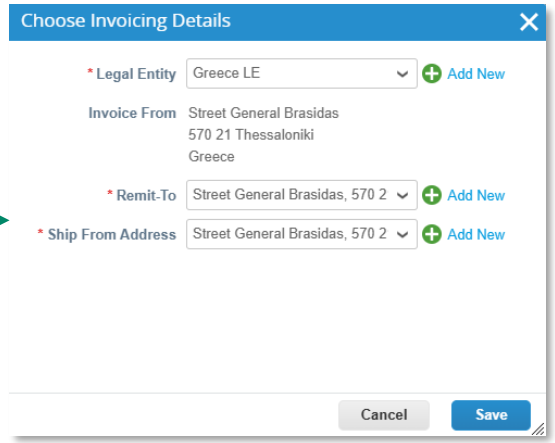
For a PO backed invoice, the *Create Invoice* form will pre-populate based on the PO. Enter your invoice number in the *Invoice #* field and then confirm the other data, especially the *Currency* and information in the *From* section.

If you are required to provide backing information to support your invoice, you should attach it in the *Attachments* section.

If you created a *Blank Invoice*, all fields will need to be populated.

2. Choose Invoice From & Remit-To Address

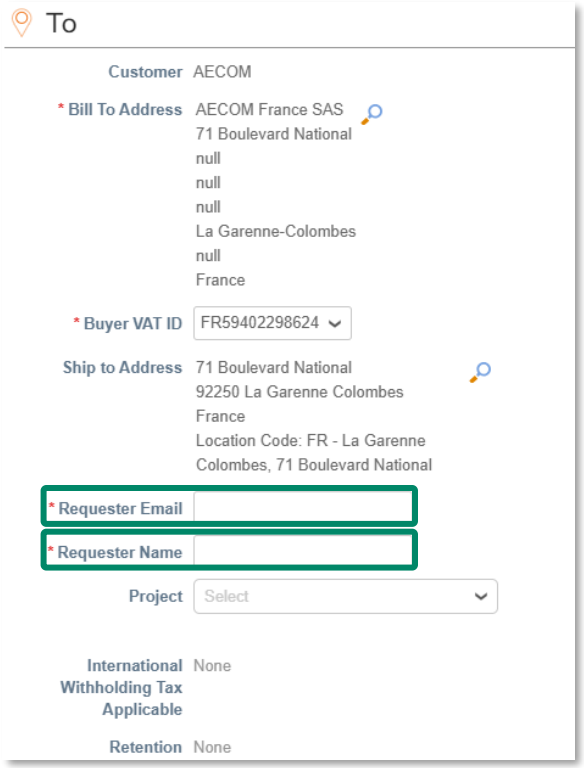
Choose the correct Invoice From Address, Remit-To Address and Ship From Addresses. When you click the search option a popup for choosing the correct addresses (from those in your profile) will appear. Select Add New if the required option isn't available.



Submitting invoices from the Coupa Supplier Portal (3/4)

3. Check Customer and Tax Details. In the *To* section, ensure the correct *Buyer VAT ID* is selected from the choices in the dropdown. Check that the information for Retention and International *Withholding Tax* is correct. Contact the *Requestor* named on the PO for any questions.

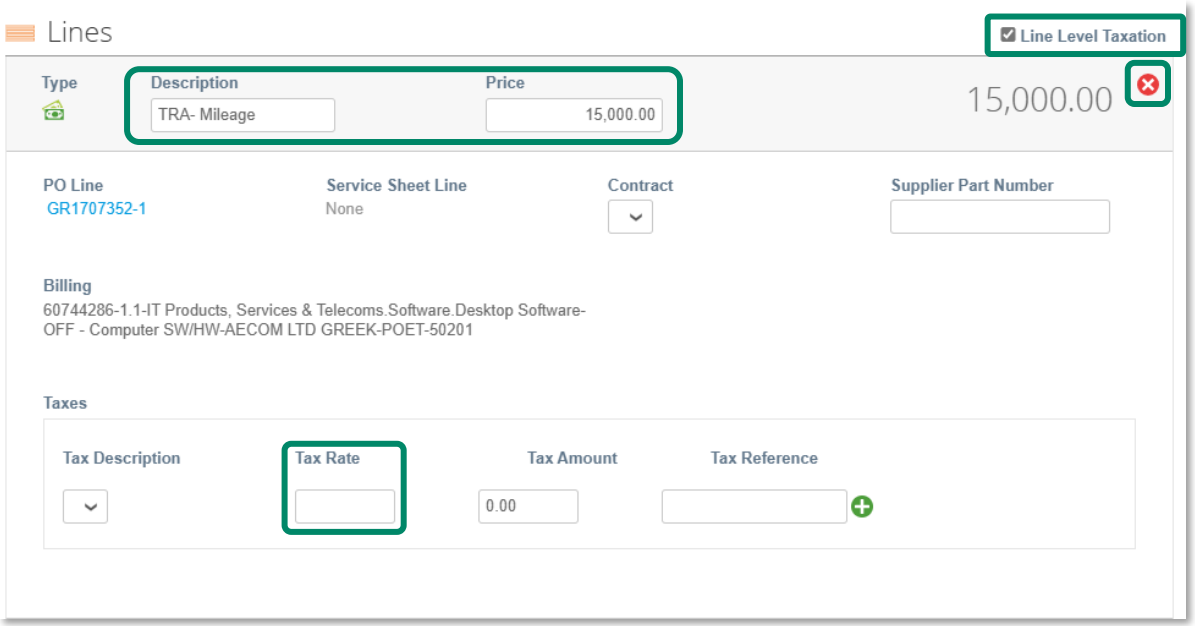
For a non-PO invoice enter the email of your AECOM contact who should receive the invoice to review in the *Requester Email* and *Requester Name* fields.



4. Validate and update the invoices lines. If you are part invoicing a line, confirm or update the *Description* and *Price* as needed to represent the portion included on this invoice. Remember for PO backed invoices that you can't exceed the purchase order price. If needed contact the Requestor named on the PO to request a PO change order.

If there are any lines you are not including, delete these zero lines by clicking on the red cross icon.

Select the *Tax Rate* that applies to the line. Lines cannot contain items with mixed Tax rats. You can switch between Line Level Taxation and Invoice level taxation as needed, using the *Line Level Taxation* checkbox.



Note: Line-level taxation will need to be validated by the supplier in countries where Coupa does not support a country specific invoice template

Submitting invoices from the Coupa Supplier Portal (3/4)

3. Check Customer and Tax Details. In the *To* section, ensure the correct *Buyer VAT ID* is selected from the choices in the dropdown. Check that the information for Retention and International *Withholding Tax* is correct. Contact the *Requestor* named on the PO for any questions.

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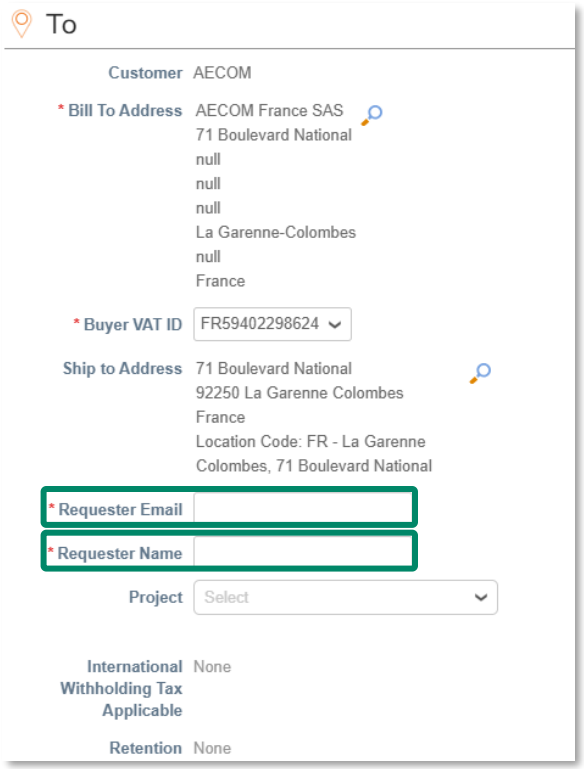

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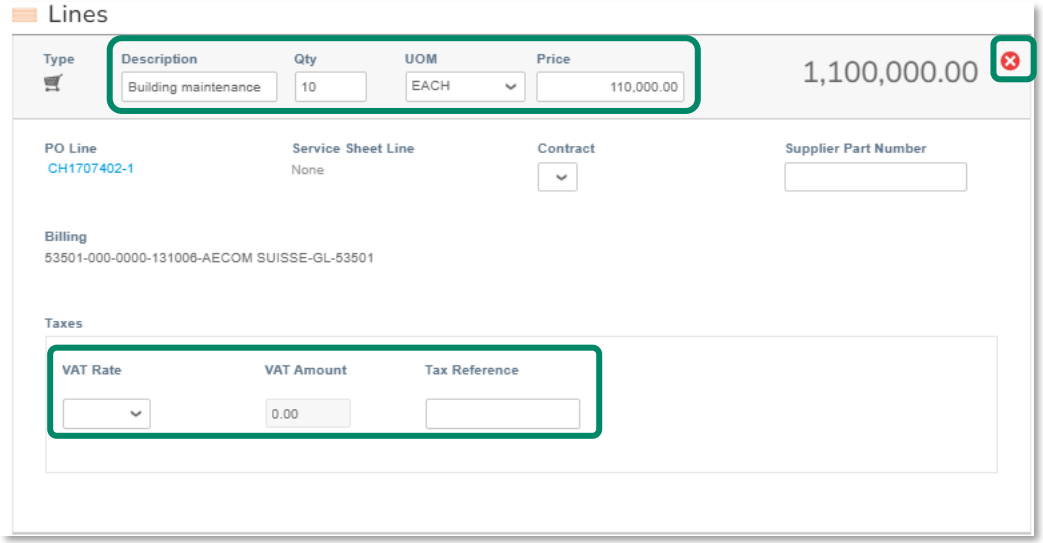
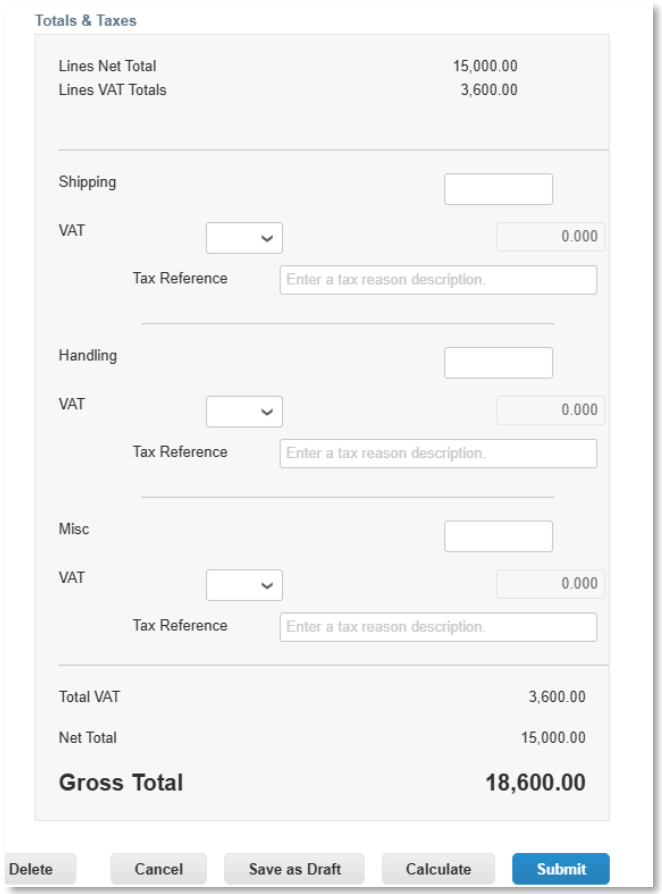


Note: Line-level taxation will need to be validated by the supplier in countries where Coupa does not support a country specific invoice template

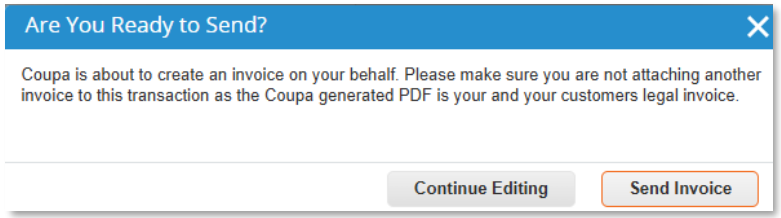
Submitting invoices from the Coupa Supplier Portal (4/4)

5. Review any shipping or handling charges that apply then submit.
If your contract allows for shipping or handling charges, enter these here.

Before you submit the invoice use the *Calculate* button to confirm the Tax that will be applied to the invoice. Once you are satisfied, press the *Submit* button.



6. Confirm Submission. As a final step Coupa will ask *Are You Ready to Send*. Note the comment that when you hit Send Coupa will generate a legal invoice on your behalf, containing the information you have reviewed and provided. When you are satisfied press *Send Invoice* to send to AECOM.



When you Send the Invoice it will go through invoice tolerance checks, and if successful will be sent directly to the Requestor to approve.

You should monitor for further updates in case the invoice fails the automatic tolerance checks, queries are raised, or the invoice is disputed. You will also get notifications of invoice approval.

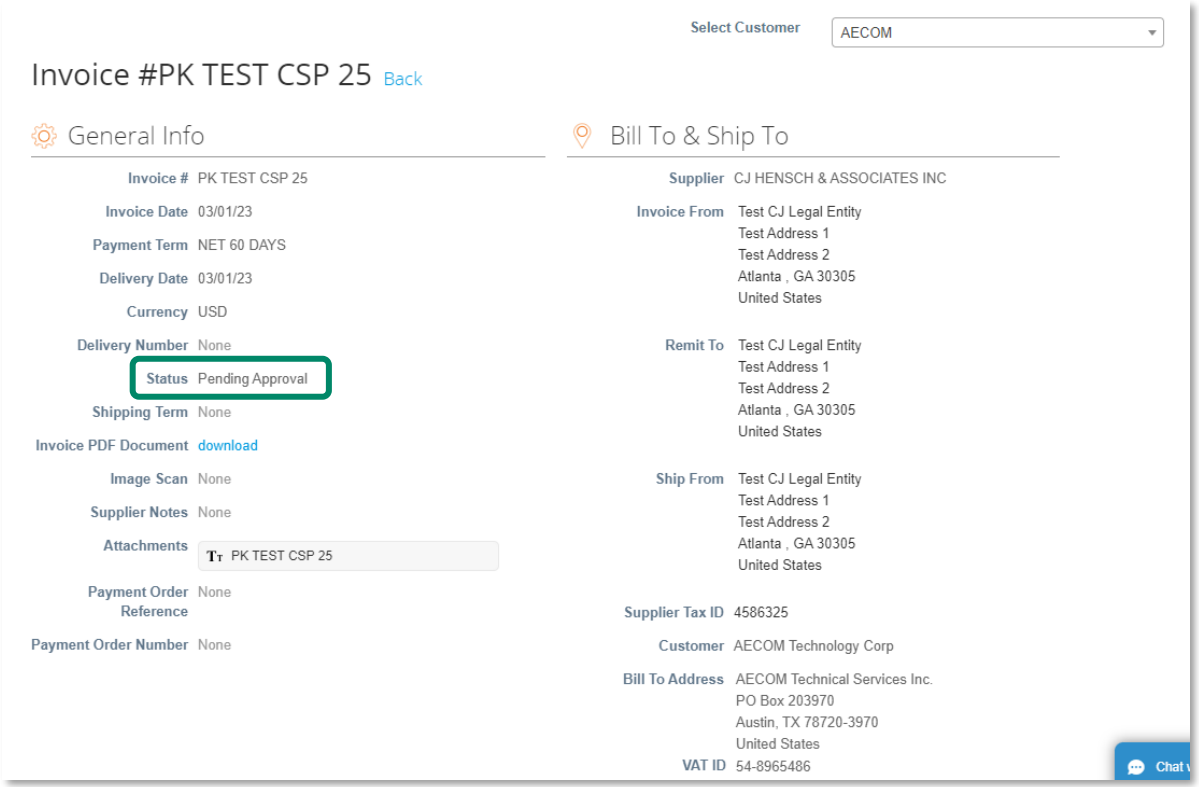
Once the invoice is approved then the invoice will be queued for payment in line with the payment terms detailed on the Purchase Order. You can see this status in the detailed invoice information section in the CSP.

By default, you will be emailed all invoice and payment updates, but you can change your Notification settings.

Invoice Statuses

When an invoice is submitted it will go through invoice tolerance checks, and if successful will be sent directly to the Requestor to approve. Once the invoice is approved then the invoice will be queued for payment in line with the payment terms detailed on the Purchase Order.

You should monitor your invoice for further updates in case the invoice fails the automatic tolerance checks, queries are raised, or the invoice is disputed. You can see the current *Status* of an invoice by accessing the detailed invoice information. This is accessed from the Invoices Homepage in the CSP. You will also get notifications of invoice status changes unless you have changed your Notification settings.



Status	Description
Draft	The invoice has been created, but it has not been submitted to AECOM yet.
Pending Approval	The invoice is currently under review by AECOM
Processing	The invoice is being processed by the Accounts Payable Team.
Approved	The invoice has been accepted for payment by AECOM and will be paid in line with payment terms
Disputed	The invoice has been disputed and needs to be reconciled or cancelled. You will need to issue a credit or resolve via your local government invoicing system (as applicable).
Abandoned	The disputed invoice has been abandoned. AECOM can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.

If you have any queries regarding invoice status or payment, please contact us:

- Africa: AfricaAECOM.AccountsPayable@aecom.com
- Europe: accountspayable.europe@aecom.com
- Middle East & KSA: MEAP.DisbursementCentre@aecom.com
- UK & Ireland: accounts.payable.europe@aecom.com
- United States & Canada: Aphelpdesk@aecom.com

Credit notes and disputes

Credit Notes and Disputes

In Coupa Credit Notes are used for 3 purposes:

- to correct an invoice,
- to cancel a duplicate invoice, or
- to resolve a dispute on an invoice.

An invoice will be disputed by AECOM:

- automatically if the invoice violates any of the invoice tolerances defined by AECOM,
- if it was rejected by an AECOM approver,
- if it fails Accounts Payable validation e.g. if the tax details are incorrect

When an invoice is disputed you will receive a notification unless you have changed your notification settings, and you should receive a note on the invoice to indicate the reason for dispute and the expected action.

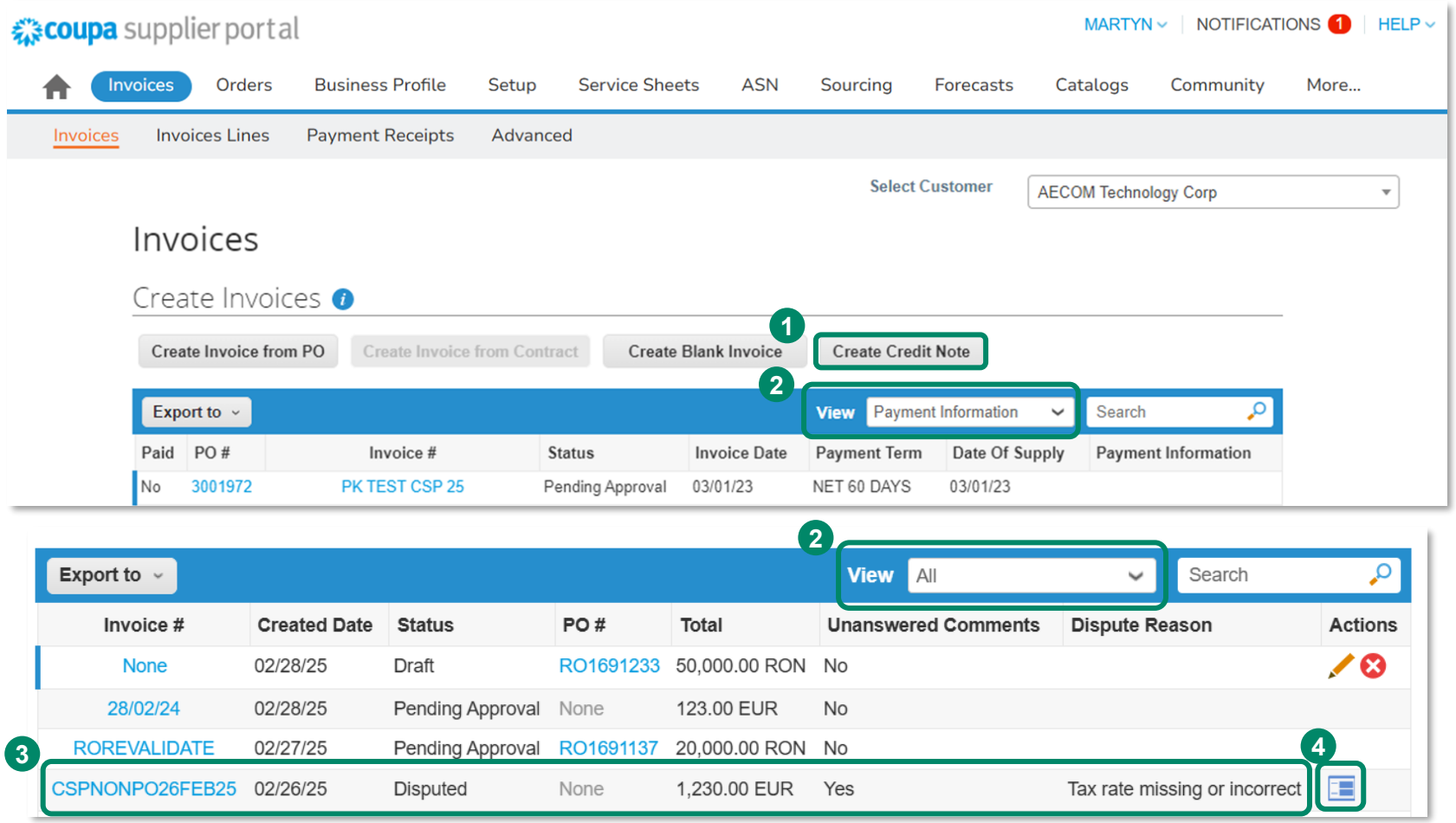
Disputed invoices are managed from the Invoices Homepage in the Coupa Supplier Portal.

AECOM does not support rebate submission via Credit Note. Please contact supplier@aecom.com for support.

Managing Credit Notes & Disputes

Disputed invoices and credit notes are managed from the Invoices Homepage in the Coupa Supplier Portal.

1. **To start a credit note** (to correct an invoice or cancel it) click the *Create Credit Note* button which will take you to Create a Credit Note.
2. **Change the *View* to *All* invoices** to see more details about invoices with the Disputed status.
3. **Review the details for Disputed invoices** including the Dispute Reason and whether there are Unanswered Comments. Click the Invoice # to view the invoice details.
4. **Click the Resolve Icon** to enter the disputed invoice and start Resolving Invoice Disputes..



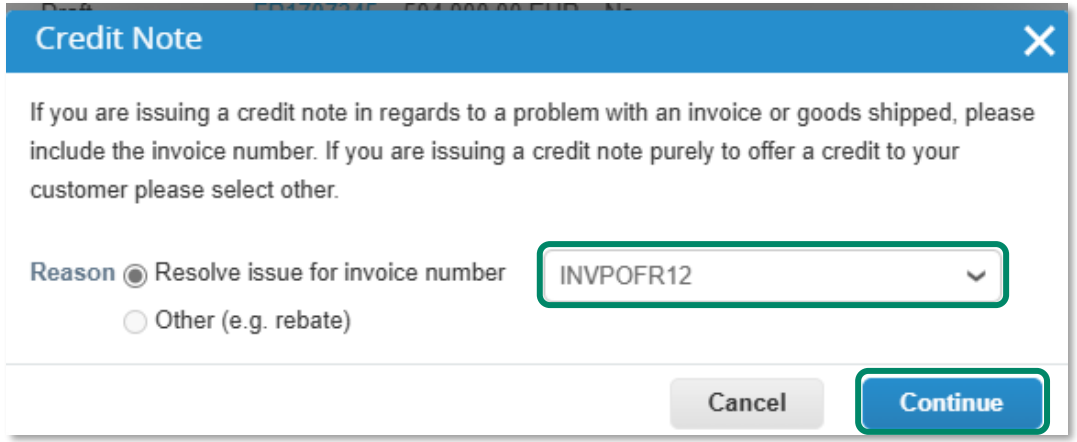
Create a Credit Note (1/3)

The Create Credit Note option is used to correct an invoice that is not disputed.

1. Select an invoice to resolve

When your select *Create a Credit Note* on the Invoice Homepage you will be presented with a pop-up to select an invoice to resolve then click *Continue*.

AECOM does not support rebate submission via Credit Note. Please contact supplier@aecom.com for support on rebates.

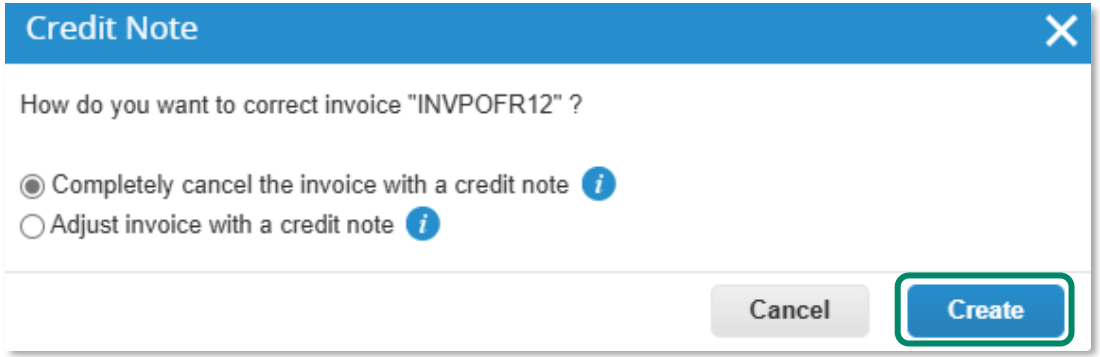


2. Confirm how to correct the invoice

A second pop-up will prompt you to choose whether to:

- *Completely cancel the invoice with a credit note*
  Choose this if you have duplicated the invoice, or if the order has been cancelled and you need to cancel the order.
- *Adjust invoice with a credit note*
  Choose this if there was an error or issue with the invoice e.g. it was the wrong value, wrong quantity or failed tolerance checks.

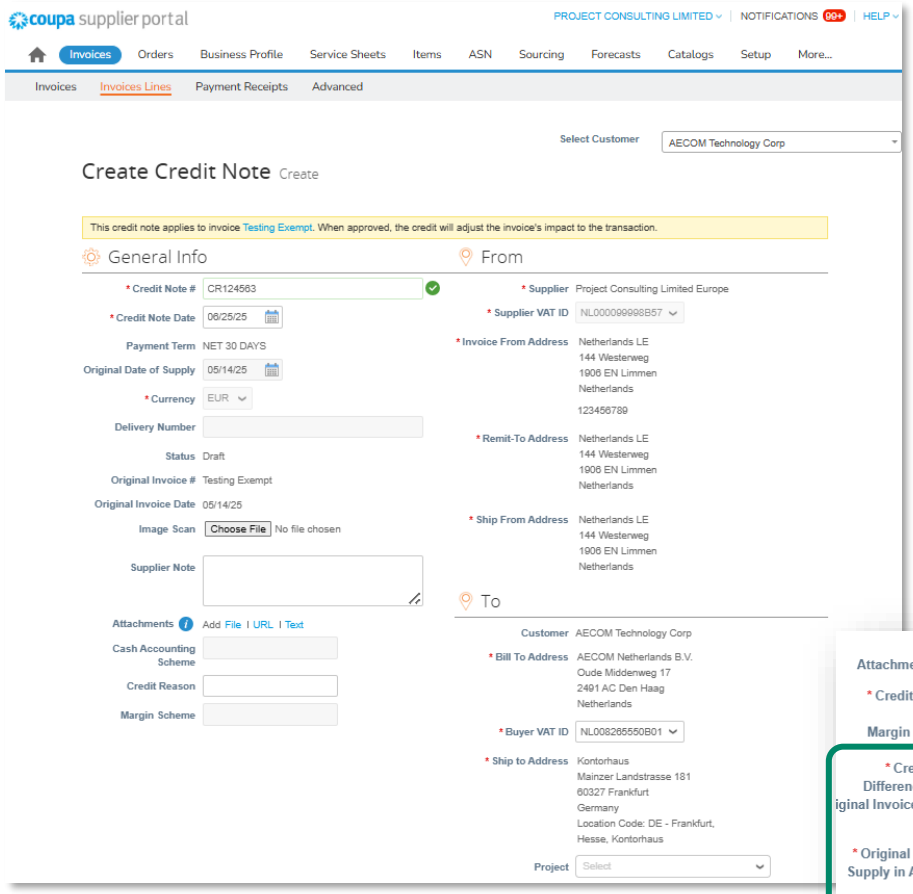
After selecting an option click on *Create* to continue.

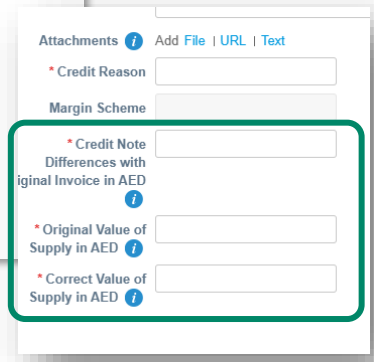


Create a Credit Note (2/3)

3. Complete and validate the Credit Note

The *Create Credit Note* page should pre-populate with information for the invoice. Enter a *credit note number* add any *Attachments*, and then validate the remaining information.

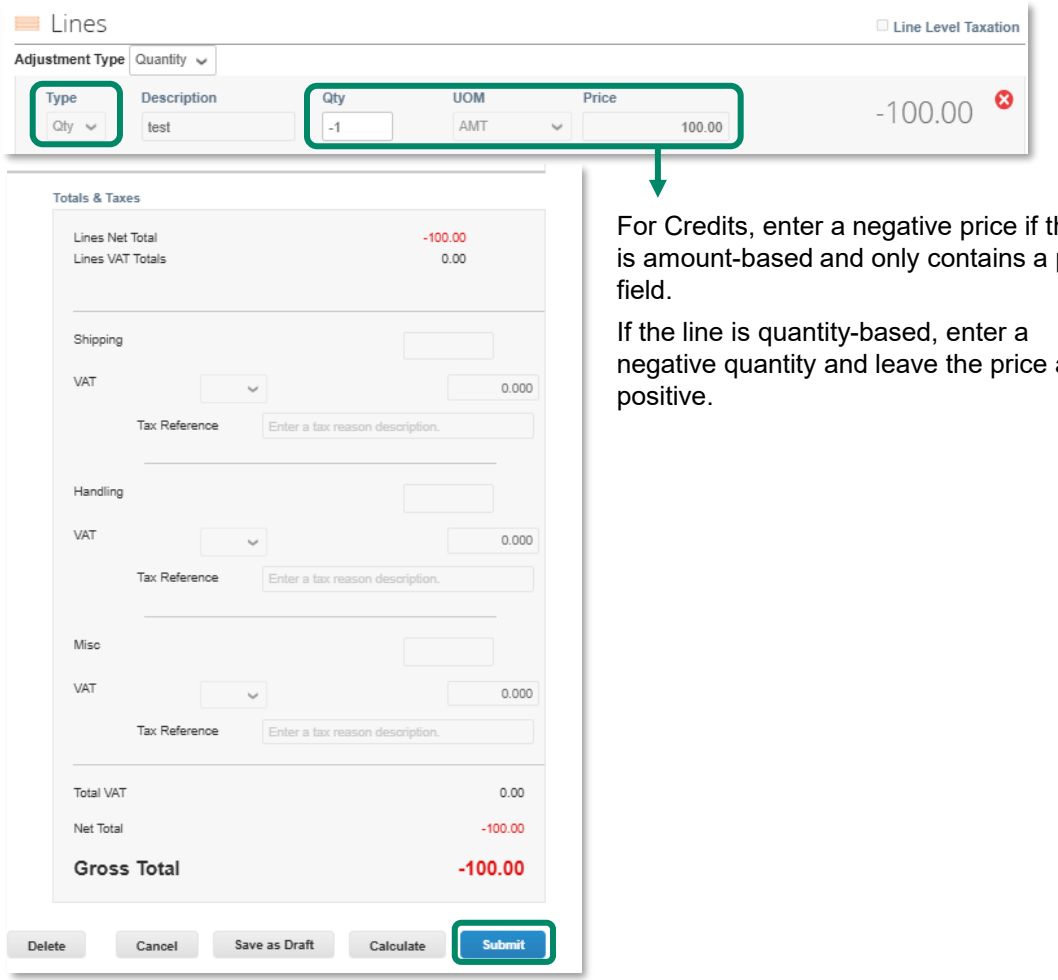




Note: Credit notes created for UAE suppliers will need 3 additional fields populated

4. Complete the lines and total section

Scroll down into the *Lines* section and make any required adjustments, then click *Submit*.



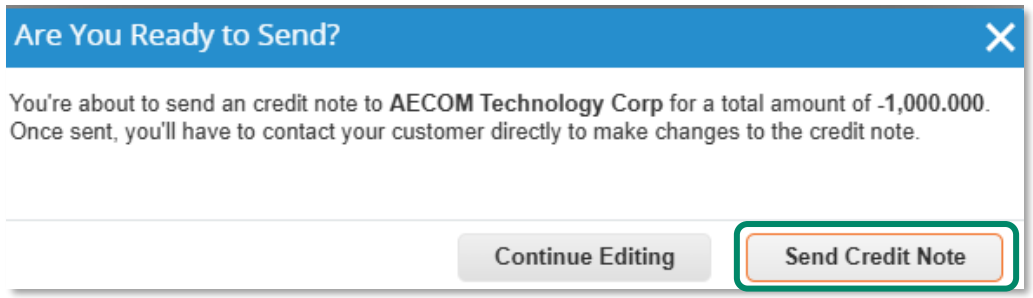
For Credits, enter a negative price if the line is amount-based and only contains a price field.

If the line is quantity-based, enter a negative quantity and leave the price as positive.

Create a Credit Note (3/3)

5. Confirm submission

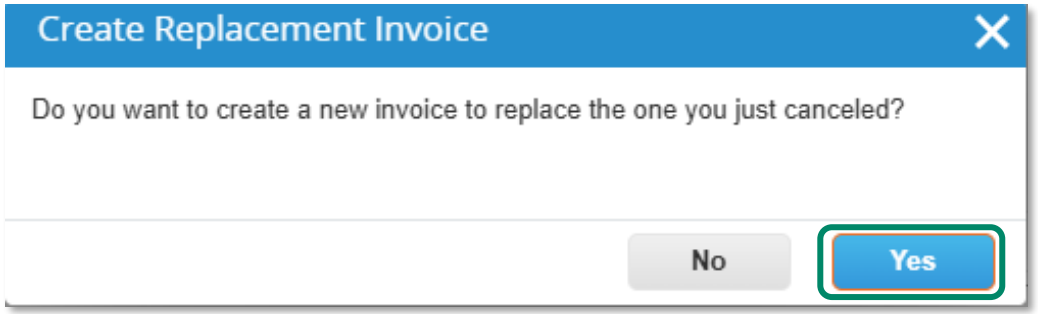
After clicking submit you'll be prompted to confirm *Are You Ready to Send?* If you are, click *Send Credit Note* to issue the credit note.



6. Create Replacement Invoice

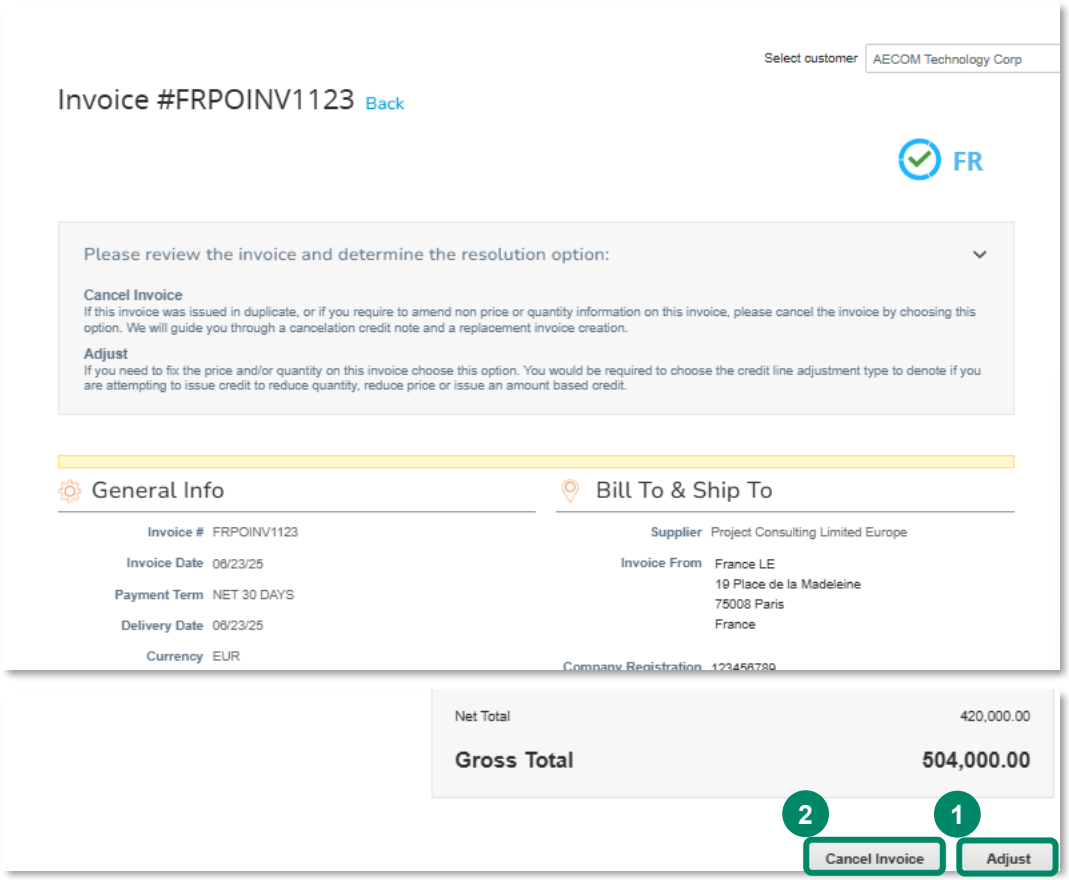
You will be asked *Do you want to create a new invoice to replace the one you just cancelled?*

- If the credit note changes the previous invoice and you need to issue a new Invoice which has changes at Line level to the Qty or Prices, click *Yes*.
- If your credit note cancelled an invoice, and you do not want to create any new Invoices, click *No*.



Resolving Invoice Disputes (1/4)

If an invoice has Disputed status, clicking the Resolve icon for that invoice on the Invoice Homepage will bring you to the Invoice Resolution Options page.



Two options will be presented for resolution. In most countries (those where 'compliant' invoices are generated in Coupa) you will be able resolve the disputed invoice by either:

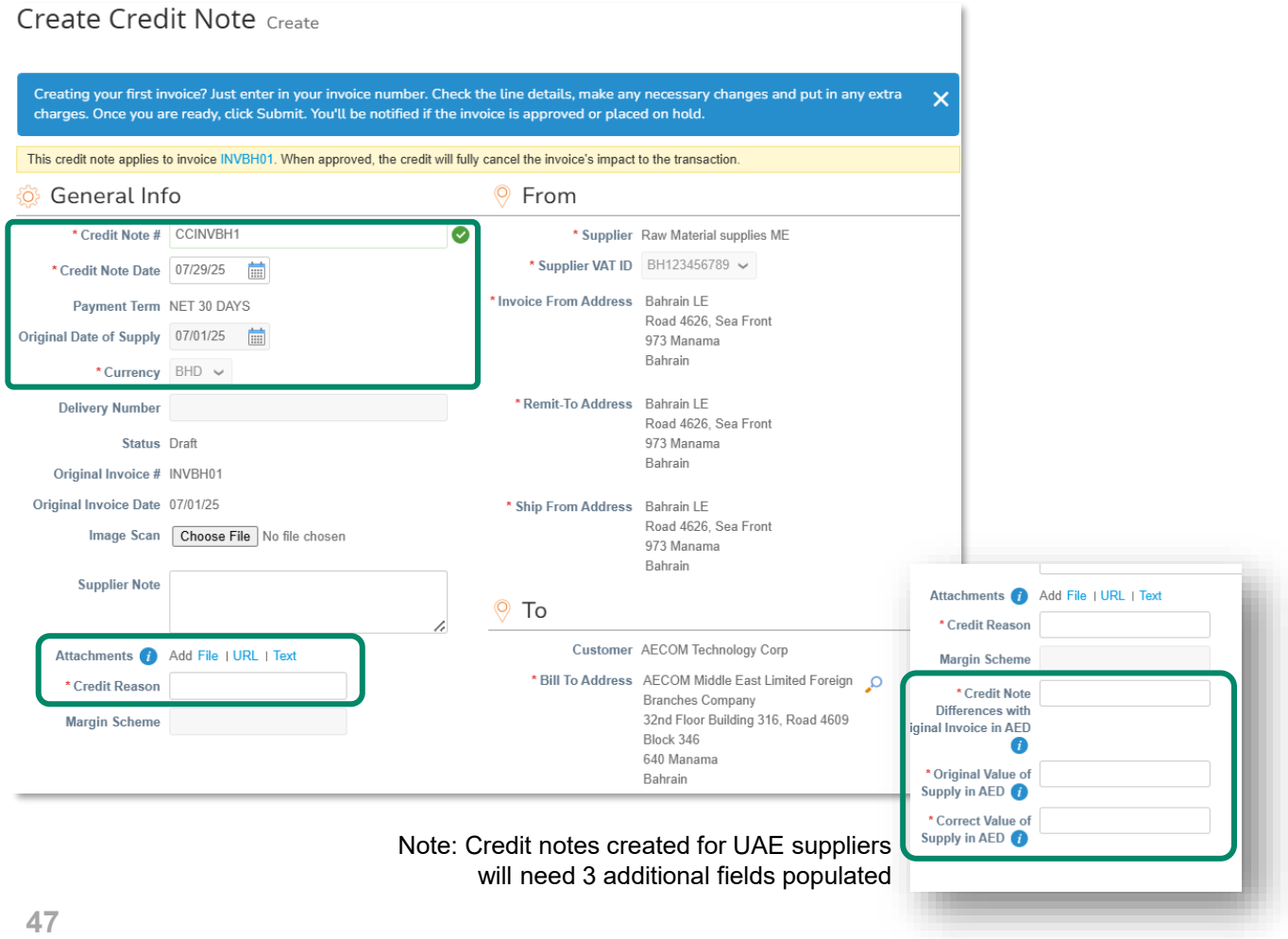
1. **Clicking on *Adjust***
   The *Adjust* options allows you to modify the invoice by adding or removing lines, adjusting quantities, or correcting pricing.

2. **Clicking on *Cancel Invoice***
   This option prompts you to create a cancellation credit note and then submit a new invoice with a new number.

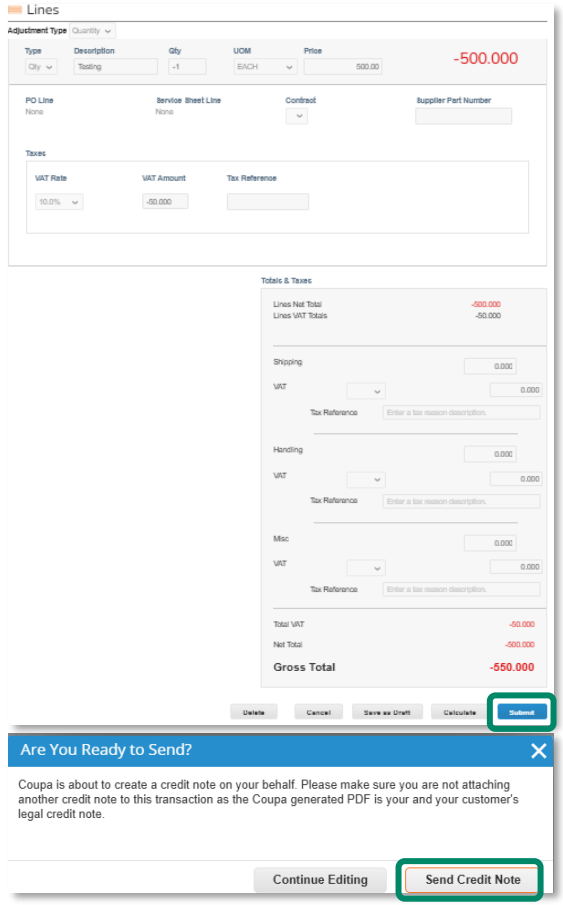
In the United States, Oman and Qatar (where Coupa invoices are not 'compliant') the options presented are slightly different and option 2 will be *Void Invoice*. Voiding an invoice has a similar effect to invoice cancellation but a Credit Note does not need to be generated.

Resolving Invoice Dispute (2/4)

Choosing the *Cancel Invoice* resolution option presents the *Create Credit Note* screen. Most details will carry over from the invoice but the *General Info* section, *Credit Reason* and *Attachments* should be populated prior to pressing *Submit*. When you are happy, choose the Send Credit Note option. As this is a full cancelation of the invoice no changes can be made at line level.

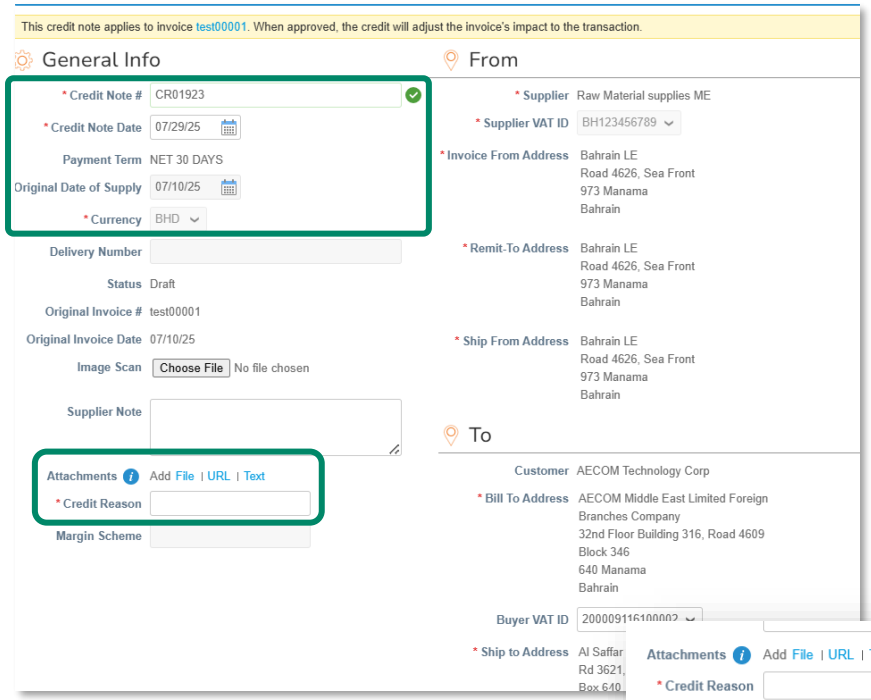


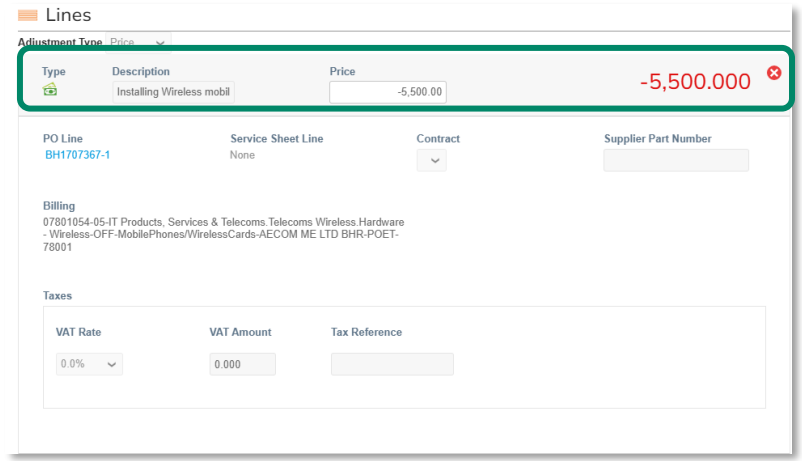
Note: Credit notes created for UAE suppliers will need 3 additional fields populated

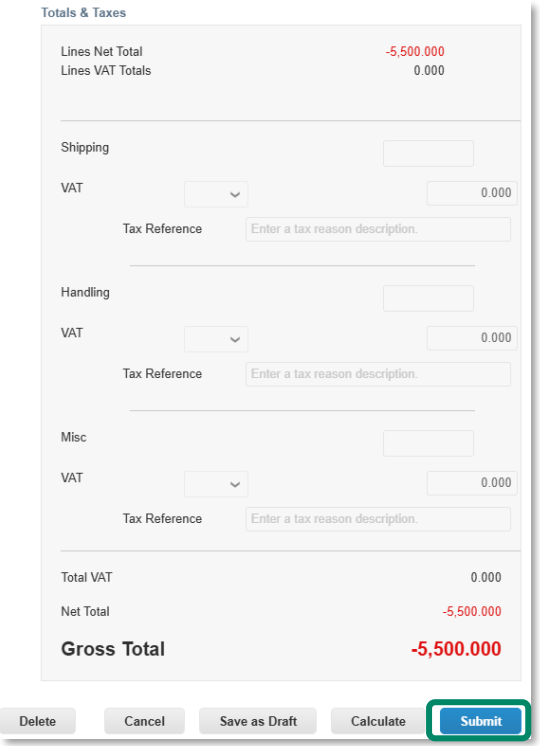


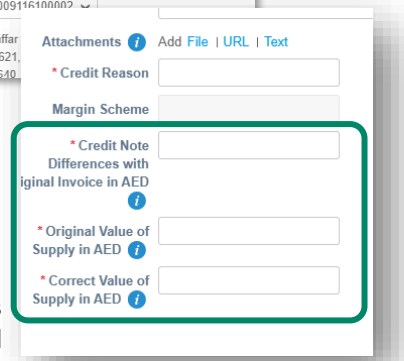
Resolving Invoice Dispute (3/4)

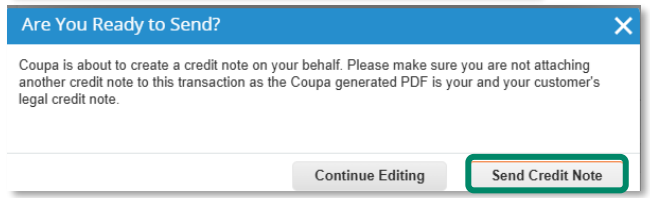
Choosing the *Adjust* resolution option presents the *Create Credit Note* screen. Most details will carry over from the invoice but the *General Info* section, *Credit Reason* and *Attachments* should be populated prior adjusting the *Price* or *Quantity* on the lines you wish to adjust. When you are satisfied, press *Submit a*nd then choose the *Send Credit Note* option.











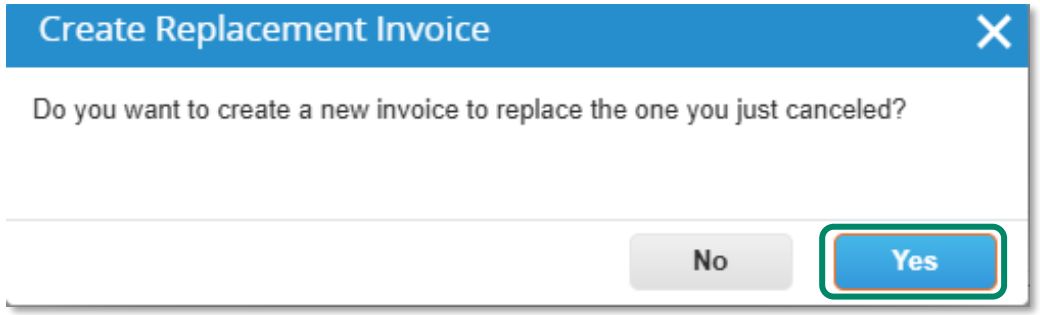
Note: Credit notes created for UAE suppliers will need 3 additional fields populated

Resolving Invoice Dispute (4/4)

Create Replacement Invoice

After issuing the Credit Note you will be asked *Do you want to create a new invoice to replace the one you just cancelled?*

- If the credit note changes the previous invoice and you need to issue a new Invoice which has changes at Line level to the Qty or Prices, click *Yes*.
- If your credit note cancelled an invoice, and you do not want to create any new Invoices, click *No*.



Setup for Suppliers in Belgium

Note for Suppliers in Belgium

- Coupa (through its OEM partner, Sovos, who is a Peppol certified access point provider), performs the role of the sending access point for the supplier.

- Legal invoices in the prescribed Peppol BIS 3.0 XMLformat along with human readable PDF/A3 format will be available for processing.

Note for Suppliers in Belgium (continued)

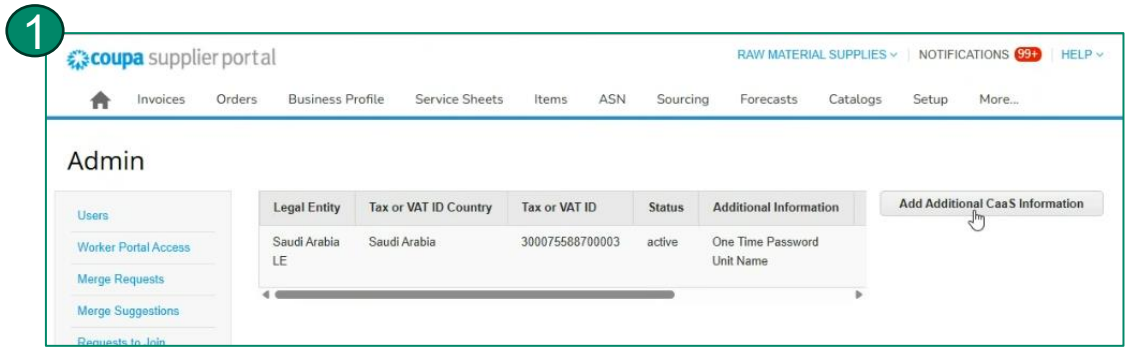
Steps to setup suppliers:

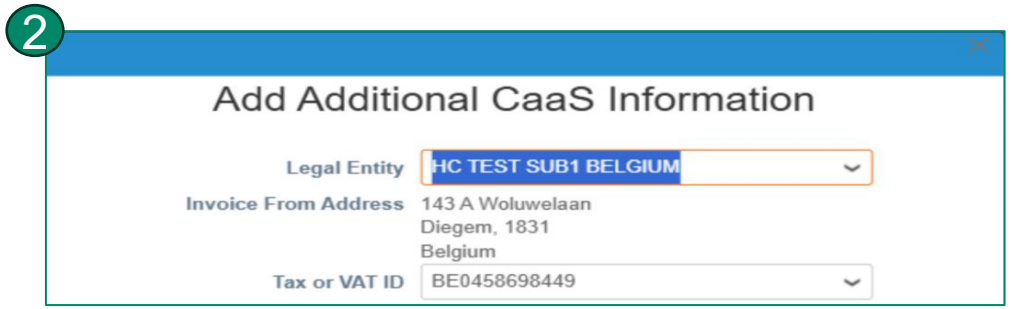
1. After setting up your legal entity in CSP, Got Setup > Additional CaaS Information > click on **Add Additional CaaS Information**

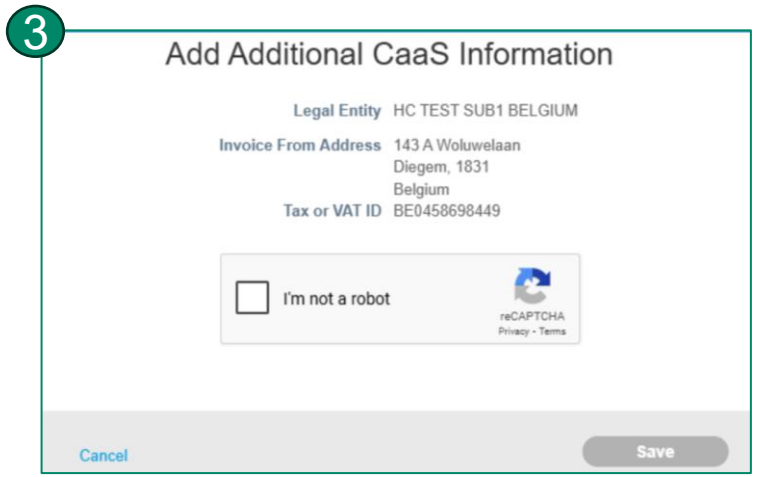
2. Select the applicable Legal Entity and Tax or VAT ID

3. Click **Next**

4. Complete the **CAPTCHA** verification, if applicable, then Click **Save**







Resources for Suppliers

For Guidance and Support using the Coupa Supplier Portal

Self Service Support

Guidance on registering and using the Coupa Supplier Portal is available on our AECOM Supplier webpage.

In addition, Coupa offers extended resources and training for suppliers on how to use their system

1:1 Support

If you need additional help with registering or using the Coupa Supplier Portal, email us at supplier@aecom.com

This page includes a guide to AECOM's Inherent Risk Questionnaire that suppliers may also be asked to complete

Our Supplier Enablement team can provide support in local language.

If you have any queries regarding invoice status or payment, please contact us:

Africa: AfricaAECOM.AccountsPayable@aecom.com

Europe: accountspayable.europe@aecom.com

Middle East & KSA: MEAP.DisbursementCentre@aecom.com

UK & Ireland: accounts.payable.europe@aecom.com

United States & Canada: Aphelpdesk@aecom.com