



# Coupa Supplier Portal (CSP) Reference Guide

English

# Legend

## Colour Legend

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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?

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## 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

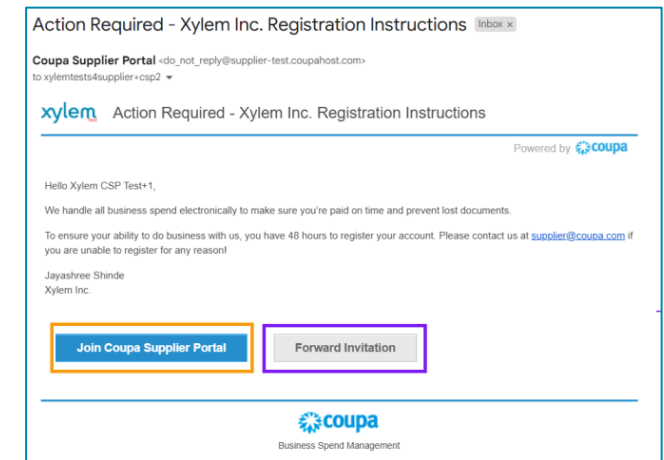
You will receive an email **from** Xylem, via the mailbox [do\\_not\\_reply@supplier.coupahost.com](mailto:do_not_reply@supplier.coupahost.com), containing two options...

#### 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.

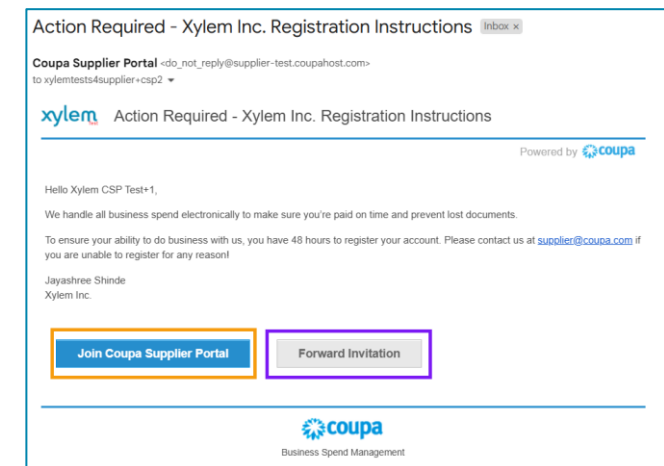
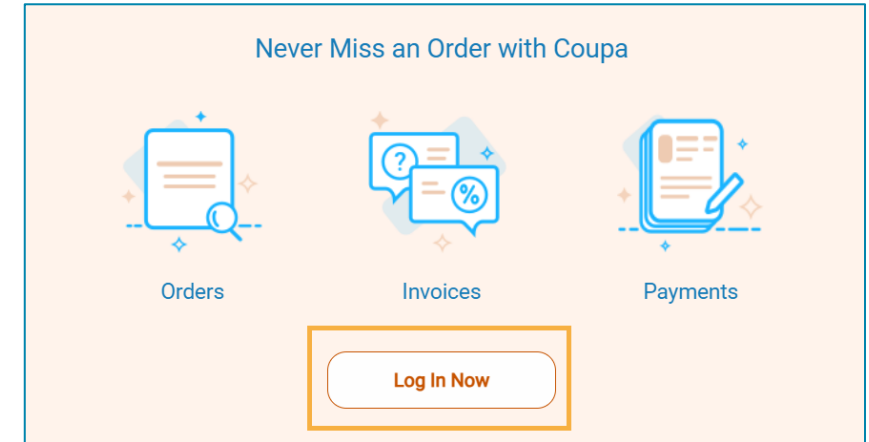
Simply click on the **Log In Now** option (or **Join and Respond** – see [section 12a](#)) to commence the registration process.

### 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. The top navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogues', and a highlighted 'Setup' button. The left sidebar shows 'Admin' with 'Connection Requests' selected, and 'Learning Centre' with 'Adding users to your account' and 'FAQs'. The main content area features a heading 'Request a connection to your first customer now!' and a modal window titled 'Search for a customer'. The modal contains a search bar with 'Xylem Inc.' entered, a search button, and a note: 'You are limited to 20 attempts. Can't find your customer? [Contact Support](#)'. Below the search bar is a 'Customer Contact' field with 'CSP Test Contact' entered. A reCAPTCHA widget is present, and a checkbox is checked. At the bottom of the modal, there are 'Cancel' and 'Request' buttons, with a red arrow pointing to the 'Request' button.

## 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.

**\* Business Name**

a) Xylem CSP Test+1  
Your legal business name (or legal personal name if an individual)

**\* Email**

xylemtests4supplier+csp2@gmail.com

**\* First Name**      **\* Last Name**

b) Xylem      CSP Test+1

**\* Password**      **\* Confirm Password**

c) .....      .....

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

**\* Country/Region**      e) **\* Tax ID** ⓘ

d) United States      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

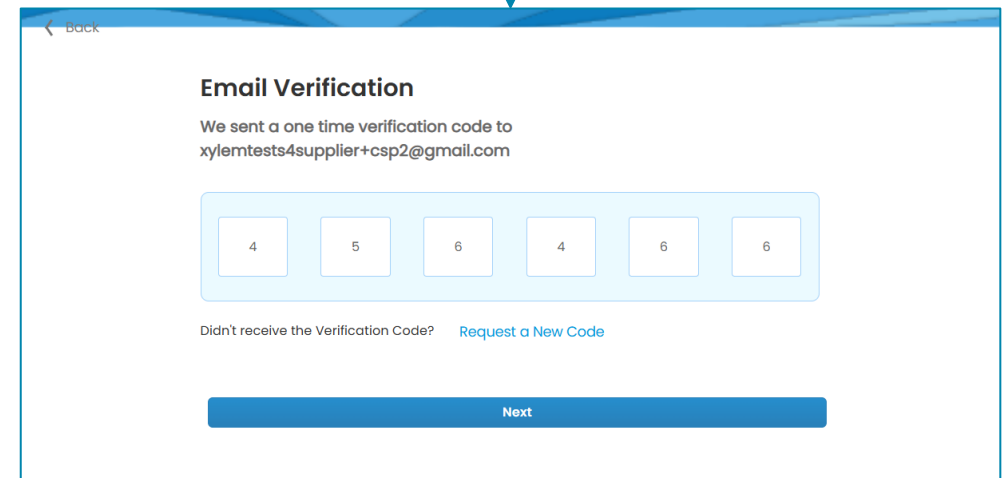
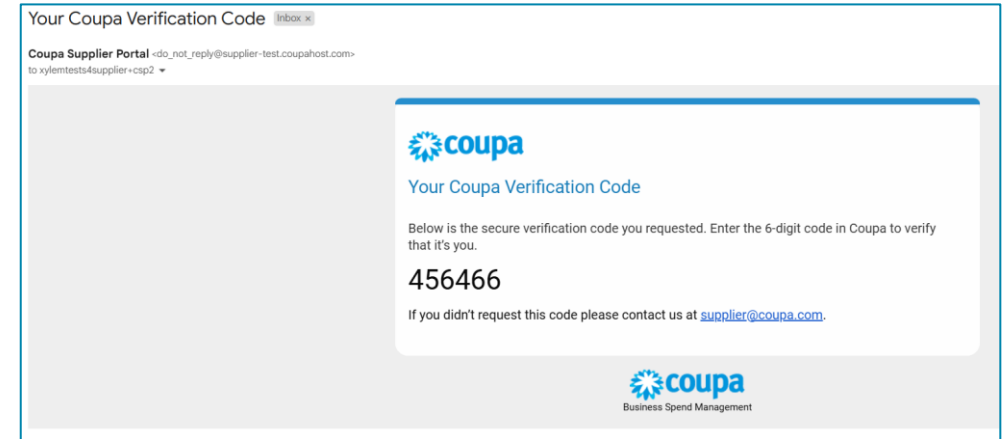
Before entry into the CSP is granted, you will be greeted with a 2-step email verification request.

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.

<p><small>* Payment Method Name ⓘ</small></p> <input type="text" value="Test 1 - Virtual Card"/>	<p><small>* Email Address</small></p> <input type="text" value="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 asterix (\*).
- 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](#)

**coupa** supplier portal b) XYLEM ▾ c) NOTIFICATIONS 0 d) HELP ▾

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

e)

### Verify Your Account And Get Noticed

Coupa Verified builds trust and gets you in front of more customers looking for products like yours.

[Get Verified](#)

**XC Xylem CSP Test+1** [Get Verified](#) f)

Profile Last Updated: about 19 hours ago | [View Profile](#) g)

#### Recent Activity h)

[View](#) ▾ [i](#)

**Xylem Inc.**

No activity found for Xylem Inc..

#### Announcements

No Announcements

i)

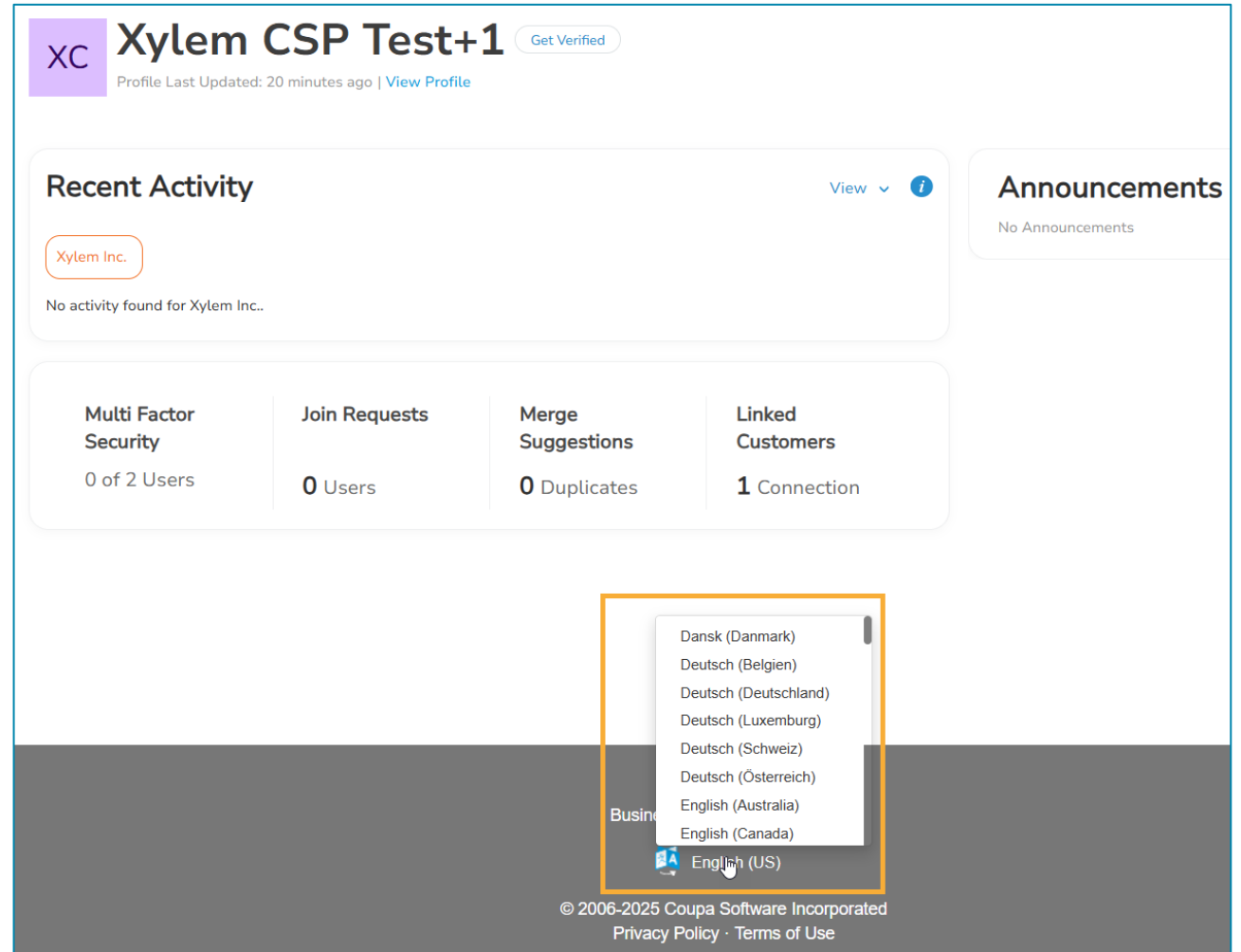
<b>Multi-Factor Security</b> 0 of 1 Users	<b>Join Requests</b> 0 Users	<b>Merge Suggestions</b> 0 Duplicates	<b>Linked Customers</b> 1 Connection
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# 5b. Managing your account

## 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

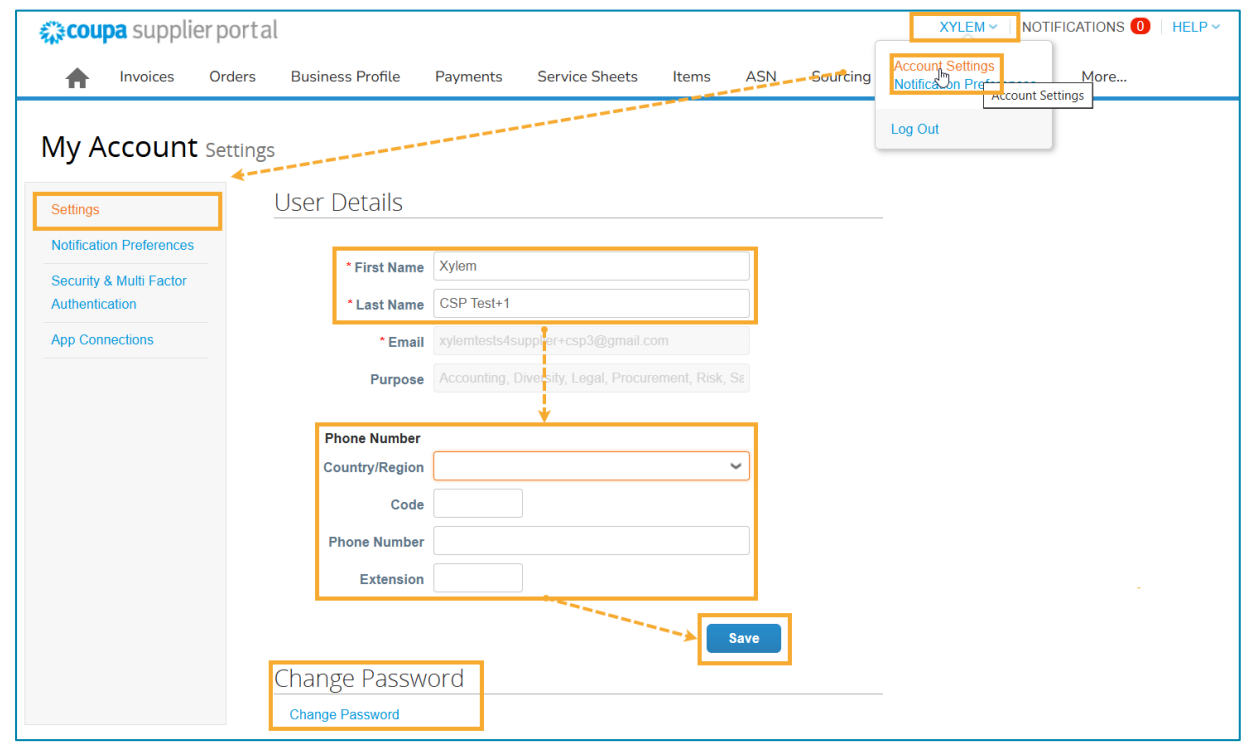
Hovering over your profile name in the top right-hand corner displays your **Account Settings** and **Notification Preferences**, along with the option to **Log Out**.

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.



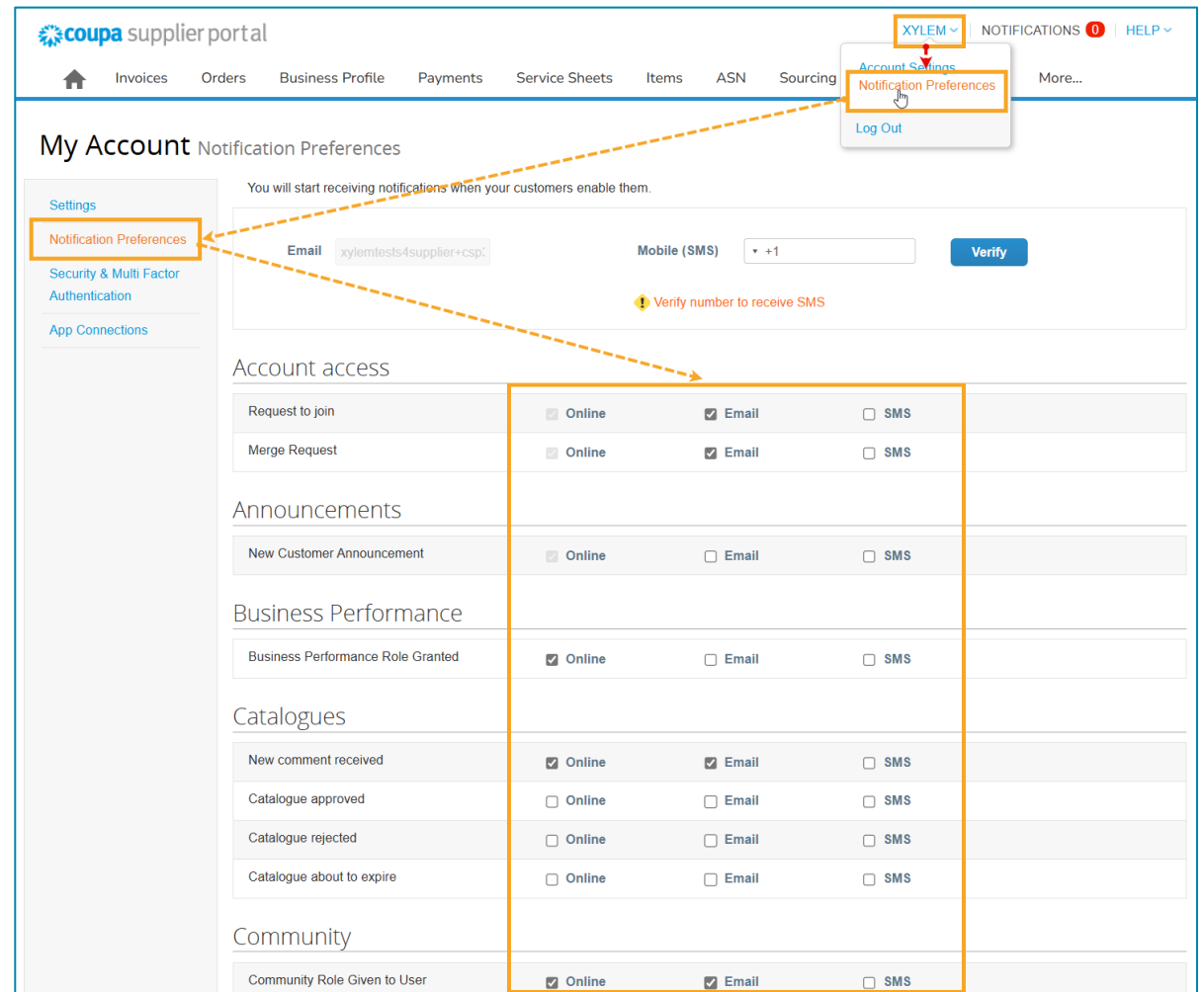
# 5d. Managing your account

## 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



# 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			
	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
a)	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Invoices			
	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
b)	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
c)	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
d)	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Orders			
	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
e)	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Sourcing Event			
f)	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> 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	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	
Sourcing Event ended	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	
Sourcing Event has been withdrawn	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	

### Supplier Merges

Merge Suggestions	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	
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### Terms of Use

Terms of Use	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
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### Users

Add Users to account	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A new customer connection created	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

### Service Sheets

A Service Sheet is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A Service Sheet is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

# 5g. Managing your account

## Multi Factor Authentication

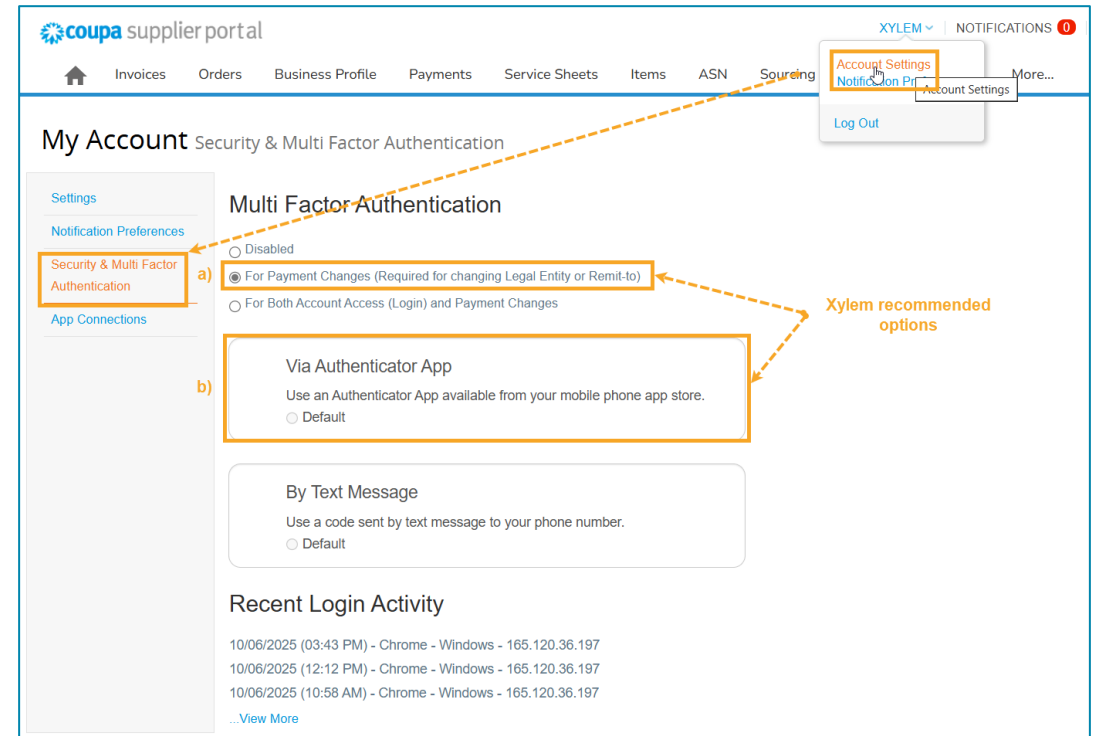
Selecting **Security & Multi Factor Authentication (MFA)** allows you to choose both:

- 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 shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Setup' highlighted. Below it, the 'Admin' menu is open, and 'Users' is selected. The 'Users' page displays a table of users. The first user is 'Xylem CSP Test+1' with an 'Active' status. The 'Permissions' column lists various system functions, and the 'Actions' column has an 'Edit' button highlighted. The page also includes a search bar and a 'View' dropdown menu.

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Xylem CSP Test+1	xylemtests4supplier+csp3@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</b>

# 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  
Xylem  
\*Last Name  
CSP Test+1  
\*Email  
xylemtest+1supplier+csp3@gmail.com

**Phone Number**

Country/Region  
Area/City  
Local  
Extension

**Purpose**

- Accounting
- Diversity
- Legal
- Procurement
- Risk
- Sales
- Sourcing

**Primary Contact**

Primary Contact  
Current primary contact: Xylem CSP Test+1

**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.

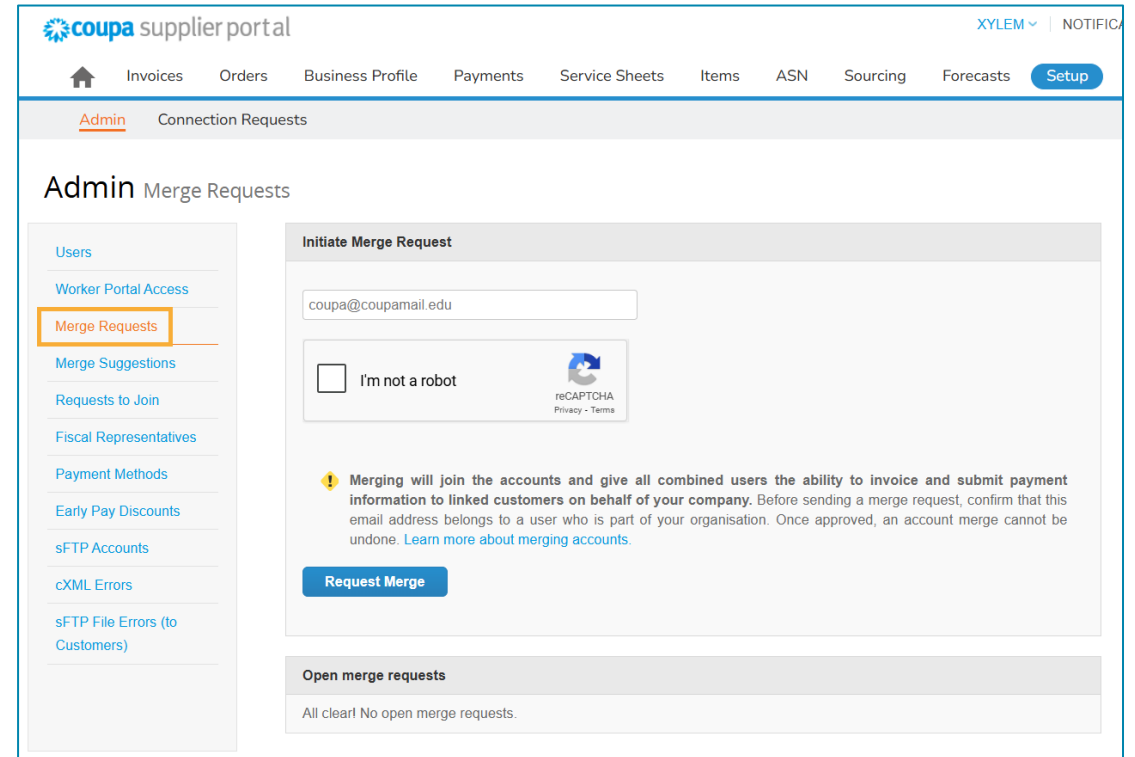
Therefore, the need may arise to merge these accounts, which can be actioned via the **Merge Requests** menu.

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**



# 6d. Admin Users

## Managing Legal Entities

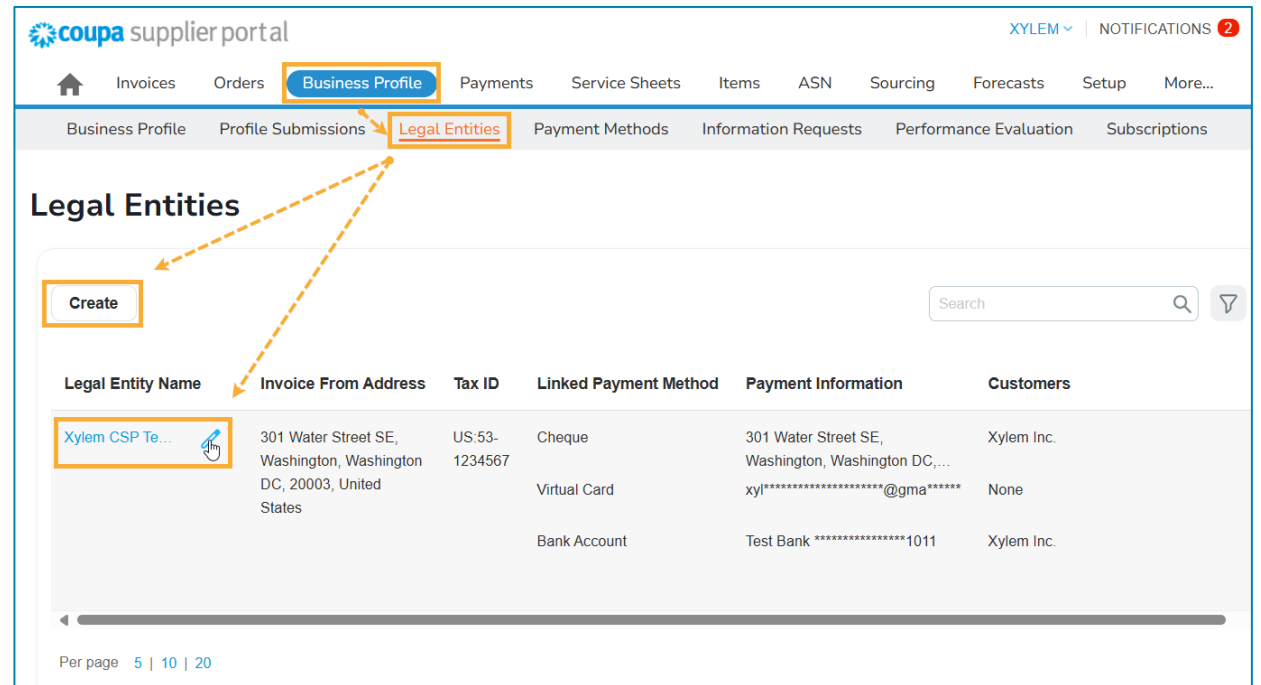
As an **Admin user**, you can also **Create** and **edit** your organisation's legal entity/entities, accessible via the **Business Profile** and **Legal Entities** menus.

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



# 6e. Admin Users

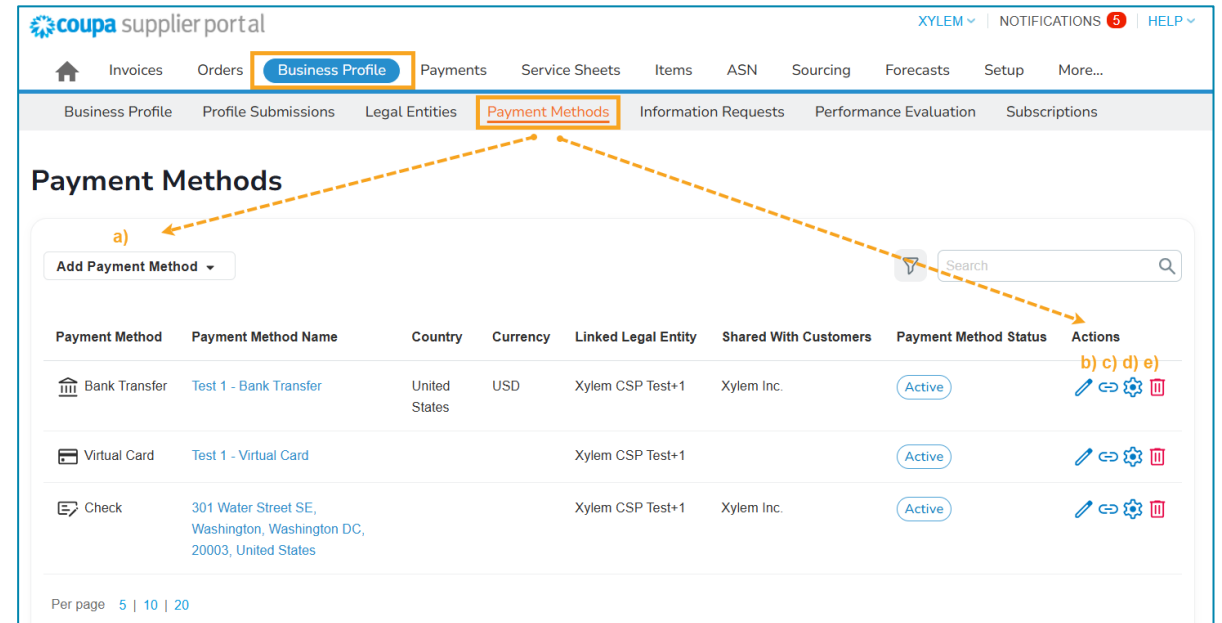
## Managing Payment Methods

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.



# 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

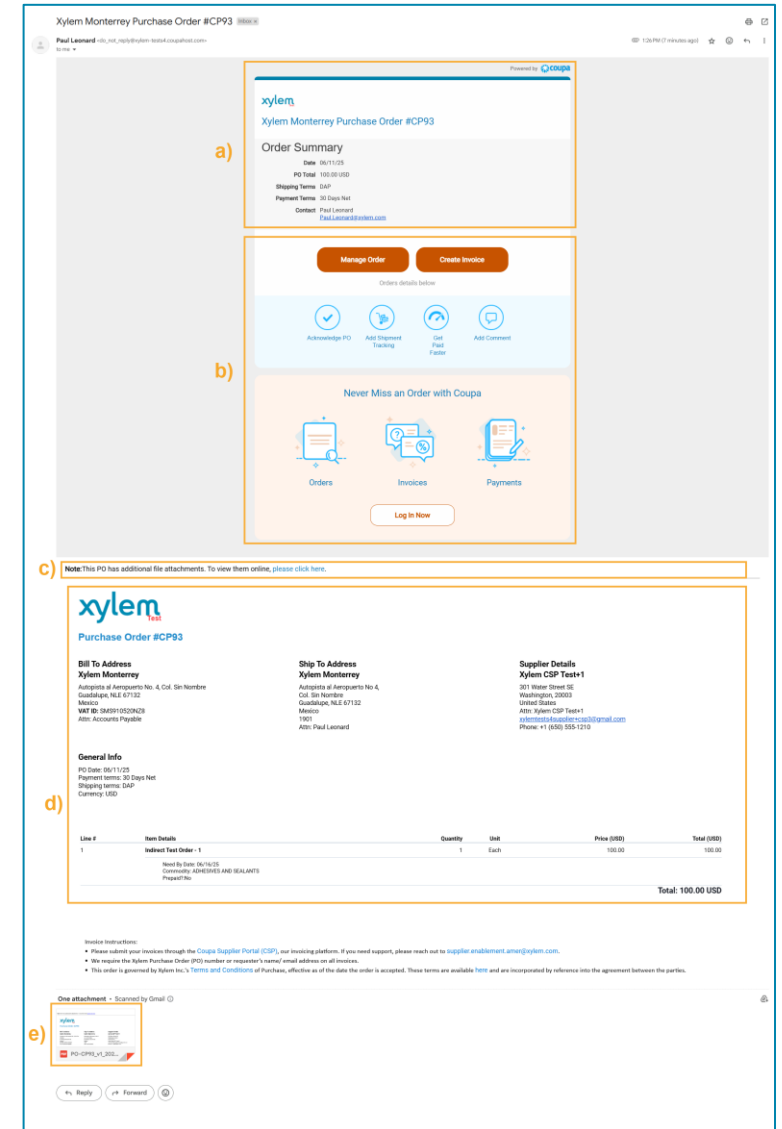
## PO Emails – Email 1

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 1<sup>st</sup> 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

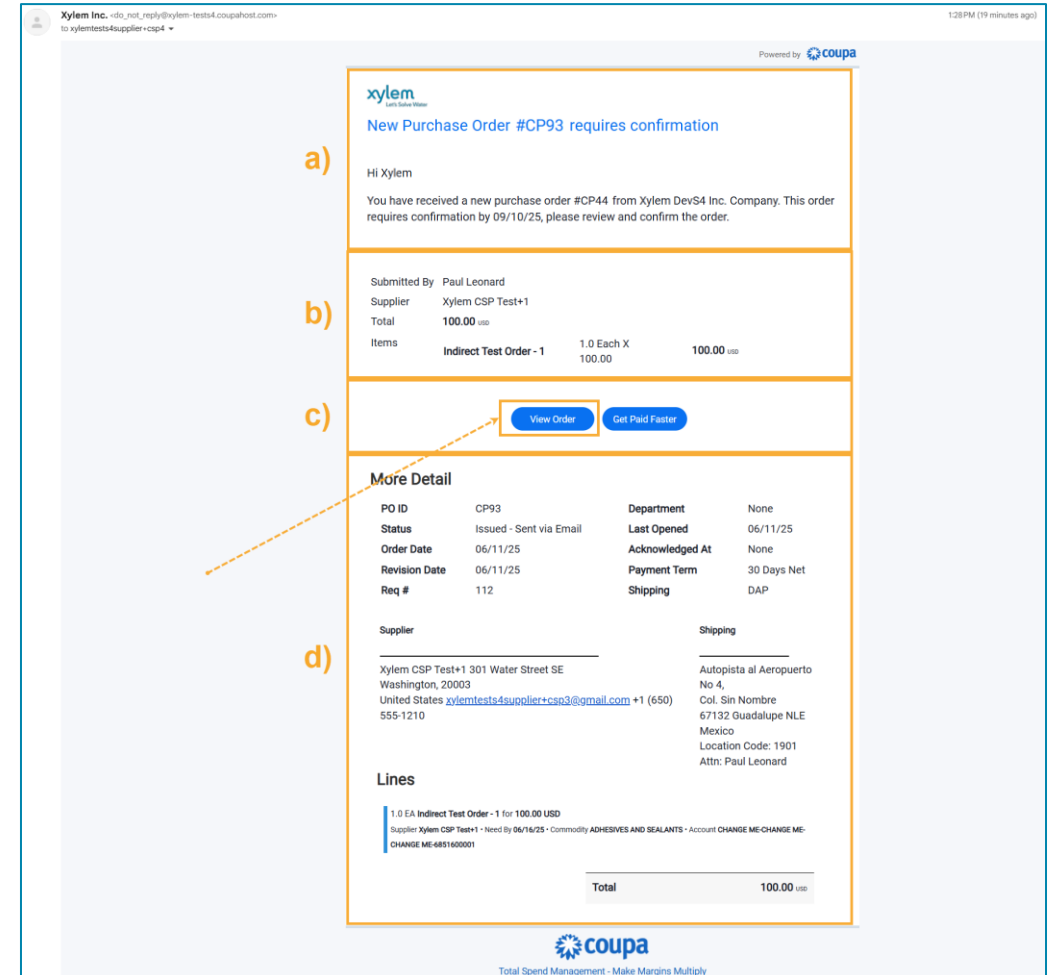
## PO Emails – Email 2

The 2<sup>nd</sup> 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 2<sup>nd</sup> 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	CPXXXXXXXXX	







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 a Purchase Order #CP93. The page is organized into several key sections:

- a) Action Required:** A notification banner at the top states "Your Action Required on Confirmation" with a deadline of "Due in 47 Hours" and a "Take me there >>" button.
- b) General Info:** A detailed header section containing fields for 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), Attachments (None), and an Acknowledged checkbox.
- c) Shipping:** A section for shipping details including Ship-To Address (Autopista al Aeropuerto No 4, Col. Sin Nombre, 67132 Guadalupe NLE, Mexico, Location Code: 1901, Attn: Paul Leonard) and Terms (CPT).
- d) Lines:** A table listing the order items. The first line is "Indirect Test Order - 1" with a quantity of 1, unit of Each, price of 100.00, and total of 100.00. It also includes fields for Need By date, Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, and Manufacturer Part Number.
- e) Summary/Actions:** A summary bar showing "Total USD 100.00" and buttons for "Create Invoice", "Save", "View/Edit Confirmation", and "Print View".
- f) Comments:** A section for adding comments, featuring an "Enter Comment" text area, an "Add File | URL" option, 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

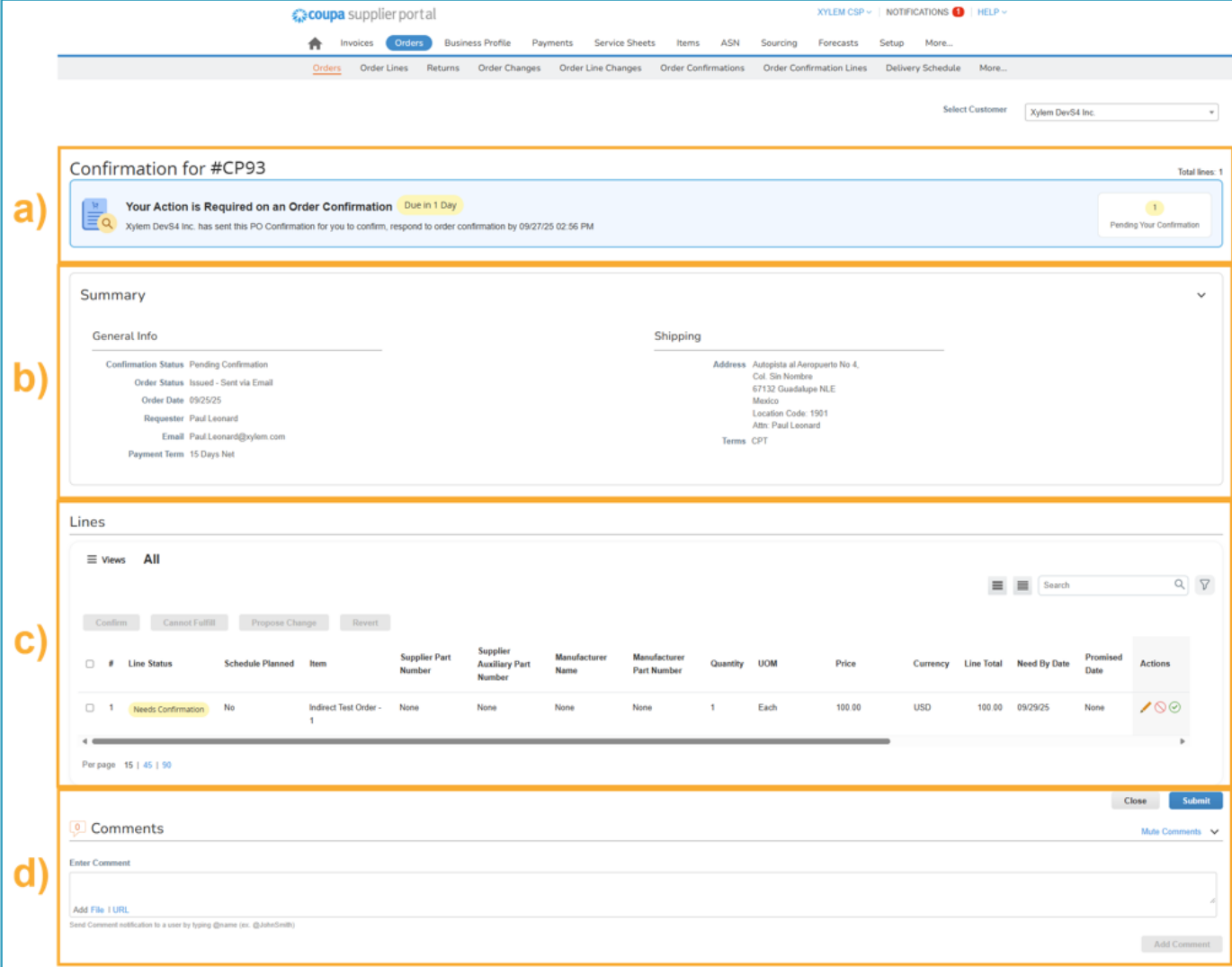
Ship-To Address Autopista al Aeropuerto No 4,  
Col. Sin Nombre  
67132 Guadalupe NLE  
Mexico  
Location Code: 1901  
Attn: Paul Leonard

# 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 PO Confirmation. The top navigation bar includes 'coupa supplier portal' and user information 'XYLEM CSP'. The main navigation menu has 'Orders' selected. A dropdown menu shows 'Select Customer' with 'Xylem DevS4 Inc.' selected. The page title is 'Confirmation for #CP93' with 'Total lines: 1'.

**a) Confirmation Header:** A blue banner with a warning icon and text: 'Your Action is Required on an Order Confirmation Due in 1 Day'. Below it, a message states: 'Xylem DevS4 Inc. has sent this PO Confirmation for you to confirm, respond to order confirmation by 09/27/25 02:56 PM'. A 'Pending Your Confirmation' button is on the right.

**b) Summary:** A section with two sub-sections: 'General Info' and 'Shipping'.  
**General Info:** Confirmation Status: Pending Confirmation; Order Status: Issued - Sent via Email; Order Date: 09/25/25; Requester: Paul Leonard; Email: Paul.Leonard@xylem.com; Payment Terms: 15 Days Net.  
**Shipping:** Address: Autopista al Aeropuerto No 4, Col. San Nabor, 67132 Guadalupe NLE, Mexico; Location Code: 1901; Attn: Paul Leonard; Terms: CPT.

**c) Lines:** A table with columns: #, 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. The table contains one row: Line 1, Status 'Needs Confirmation', Schedule 'No', Item 'Indirect Test Order - 1', Price '100.00', Currency 'USD', Line Total '100.00', Need By Date '09/29/25', Promised Date 'None'. The Actions column shows 'Confirm', 'Cannot Fulfill', 'Propose Change', and 'Revert' buttons, along with 'Accept', 'Reject', and 'Edit' icons.

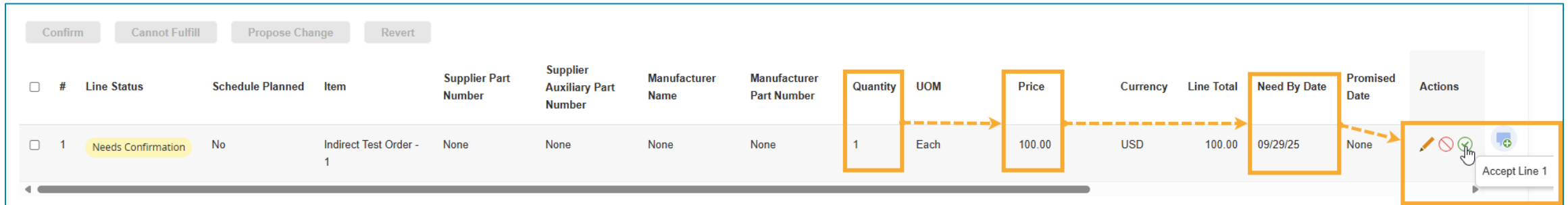
**d) Comments:** A section with a 'Comments' header, a text input field 'Enter Comment', and an 'Add File | URL' button. A footer note says 'Send Comment notification to a user by typing @name (ex. @John@Smith)'. There are 'Close', 'Submit', and 'Add Comment' buttons.

# 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** 

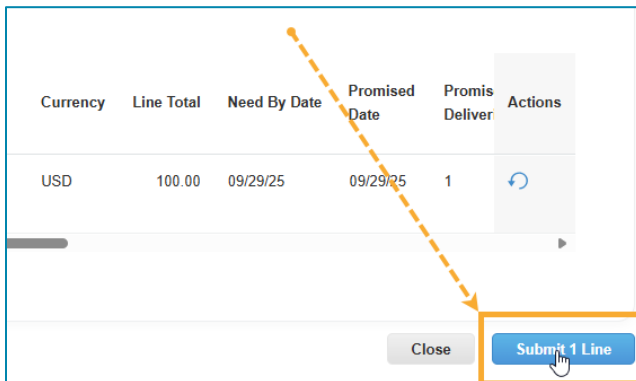
Please note, you are required to confirm **each line** contained on the Purchase Order.




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	    Accept Line 1

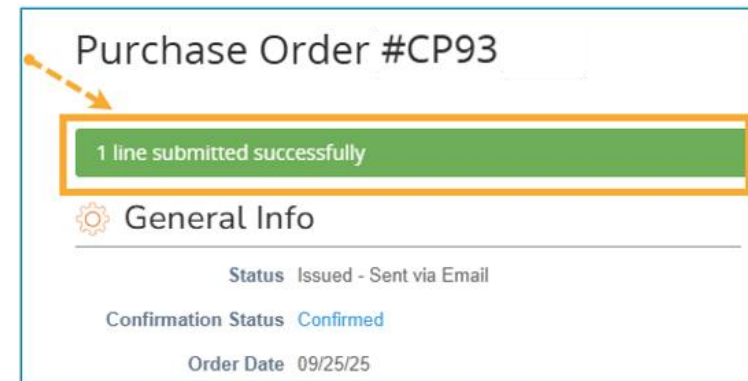
Once all lines are actioned, please click **Submit x Line(s)**, where x = the number of PO lines being confirmed.



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 **Confirmed**.



Purchase Order #CP93

**1 line submitted successfully**

General Info

Status Issued - Sent via Email

Confirmation Status **Confirmed**

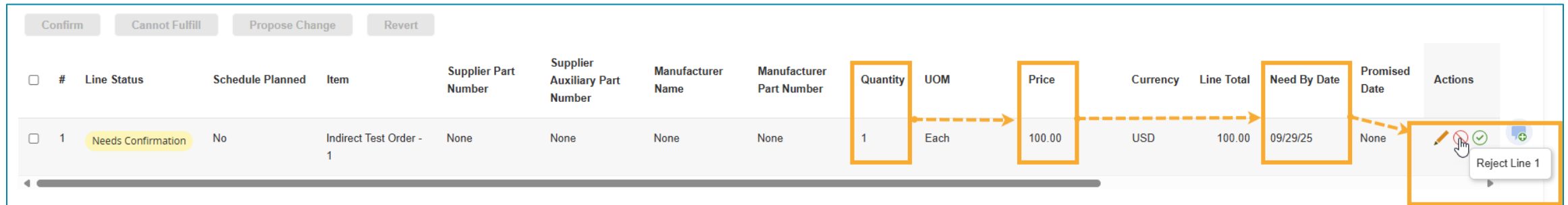
Order Date 09/25/25

# 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.

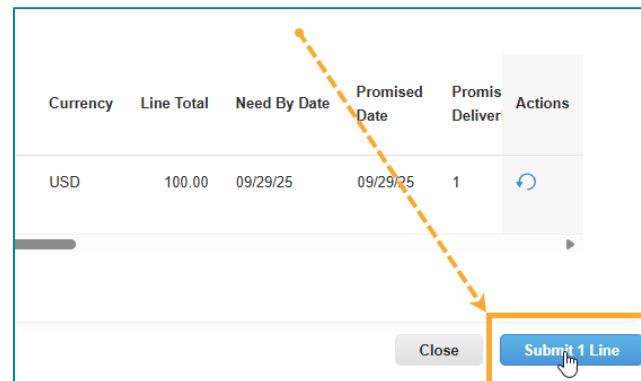


The screenshot shows a table of purchase order lines. The first line is highlighted with a yellow 'Needs Confirmation' tag. The columns are: #, Line Status, Schedule Planned, Item, Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, Manufacturer Part Number, Quantity, UOM, Price, Currency, Line Total, Need By Date, Promised Date, and Actions. The 'Quantity' (1), 'Price' (100.00), and 'Need By Date' (09/29/25) are highlighted with orange boxes. A dashed orange arrow points from the 'Quantity' box to the 'Price' box, and another dashed orange arrow points from the 'Price' box to the 'Need By Date' box. In the 'Actions' column, the 'Reject Line 1' option is highlighted with a yellow box and a mouse cursor.

#	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.

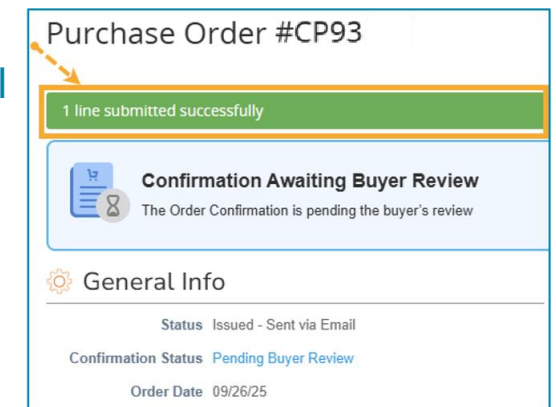
Once all lines are actioned, please click **Submit x Line(s)**, where x = the number of PO lines being confirmed.



The screenshot shows a table with columns: Currency, Line Total, Need By Date, Promised Date, Promis Deliver, and Actions. The first row contains: USD, 100.00, 09/29/25, 09/29/25, 1, and a refresh icon. A dashed orange arrow points from the 'Need By Date' column to the 'Submit 1 Line' button, which is highlighted with a yellow box and a mouse cursor.

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

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



The screenshot shows a purchase order confirmation page for Purchase Order #CP93. A green banner at the top says '1 line submitted successfully'. Below it, a blue banner says 'Confirmation Awaiting Buyer Review' with a shopping cart icon and a clock icon, and the text 'The Order Confirmation is pending the buyer's review'. Under 'General Info', the status is 'Issued - Sent via Email', the confirmation status is 'Pending Buyer Review', and the order date is '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.

Confirm   Cannot Fulfill   Propose Change   Revert

<input type="checkbox"/>	#	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
<input type="checkbox"/>	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.

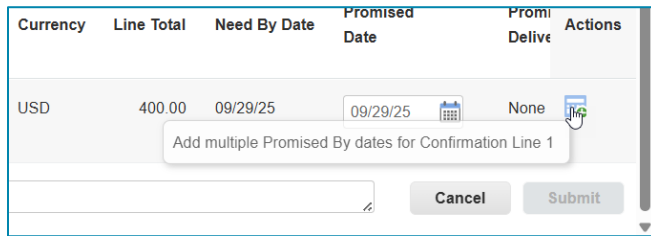
Line Status	Schedule Planned	Item	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Quantity	UOM	Price	Currency	Line Total	Need By Date	Promised Date	Actions	
Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	<input type="text" value="4"/>	Each	<input type="text" value="100.00"/>	USD	400.00	09/29/25	<input type="text" value="09/29/25"/>	 	
							* Reason	<input type="text" value="Out of stock"/>							
										Comment	<input type="text"/>				<input type="button" value="Cancel"/> <input type="button" value="Submit"/>


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

# 7j. Purchase Orders

## PO Confirmations – Delivery Schedule

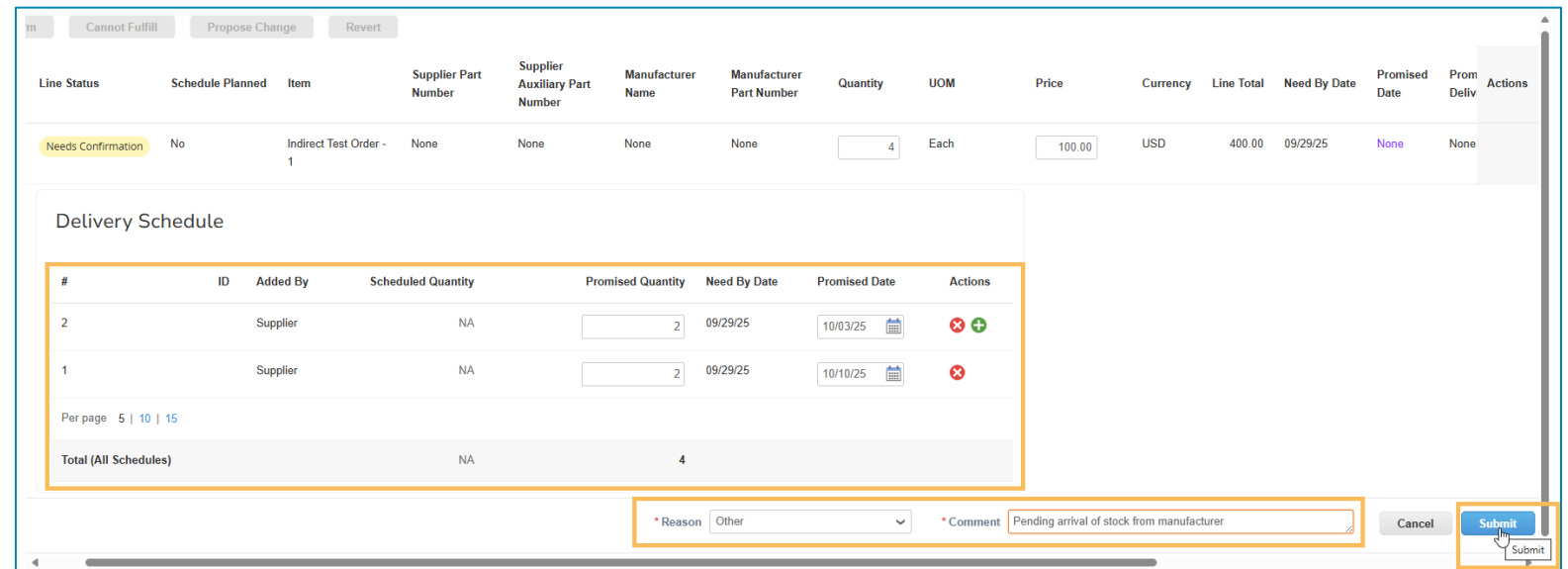
If you **cannot** fulfil the order line in a single delivery, you may wish to use the **Delivery Schedule** function, accessible by first selecting **Edit** , and then **Add multiple Promised By dates for Confirmation Line x**,  where x = the PO line number being confirmed.



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  .




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.



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	Prom Deliv	Actions
Needs Confirmation	No	Indirect Test Order - 1	None	None	None	None	4	Each	100.00	USD	400.00	09/29/25	None	None	

#	ID	Added By	Scheduled Quantity	Promised Quantity	Need By Date	Promised Date	Actions
2		Supplier	NA	2	09/29/25	10/03/25	 
1		Supplier	NA	2	09/29/25	10/10/25	

Per page 5 | 10 | 15

Total (All Schedules) NA 4

\* Reason Other \* Comment Pending arrival of stock from manufacturer

Submit

# 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](#)

Purchase Order #4070003292 Revision 2 (Current) Oct 22

**Confirmation Status Pending Confirmation**

Order Date 10/15/25

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](#)

Purchase Order #CP4646 Revision 2 (Current) Oct 22

**Confirmation Status Confirmed**

Order Date 10/22/25

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](#)

Purchase Order #CP4177 Note, no further revision(s) show

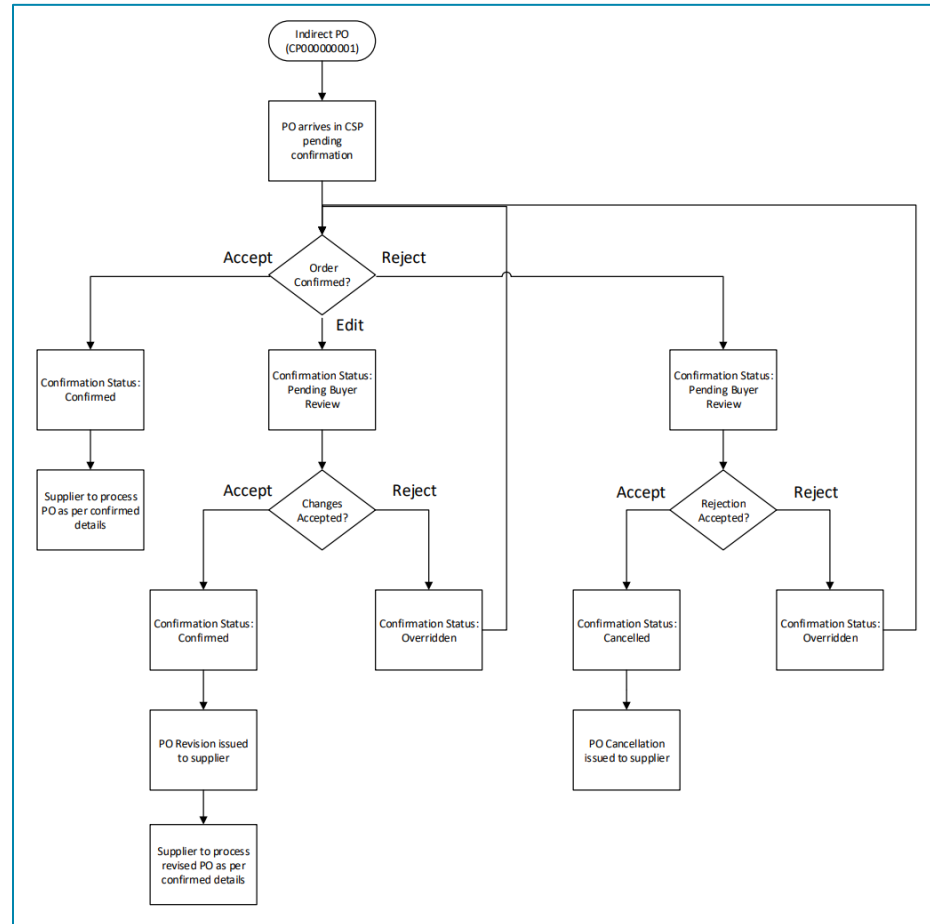
**Confirmation Status Cancelled**

Order Date 09/26/25

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

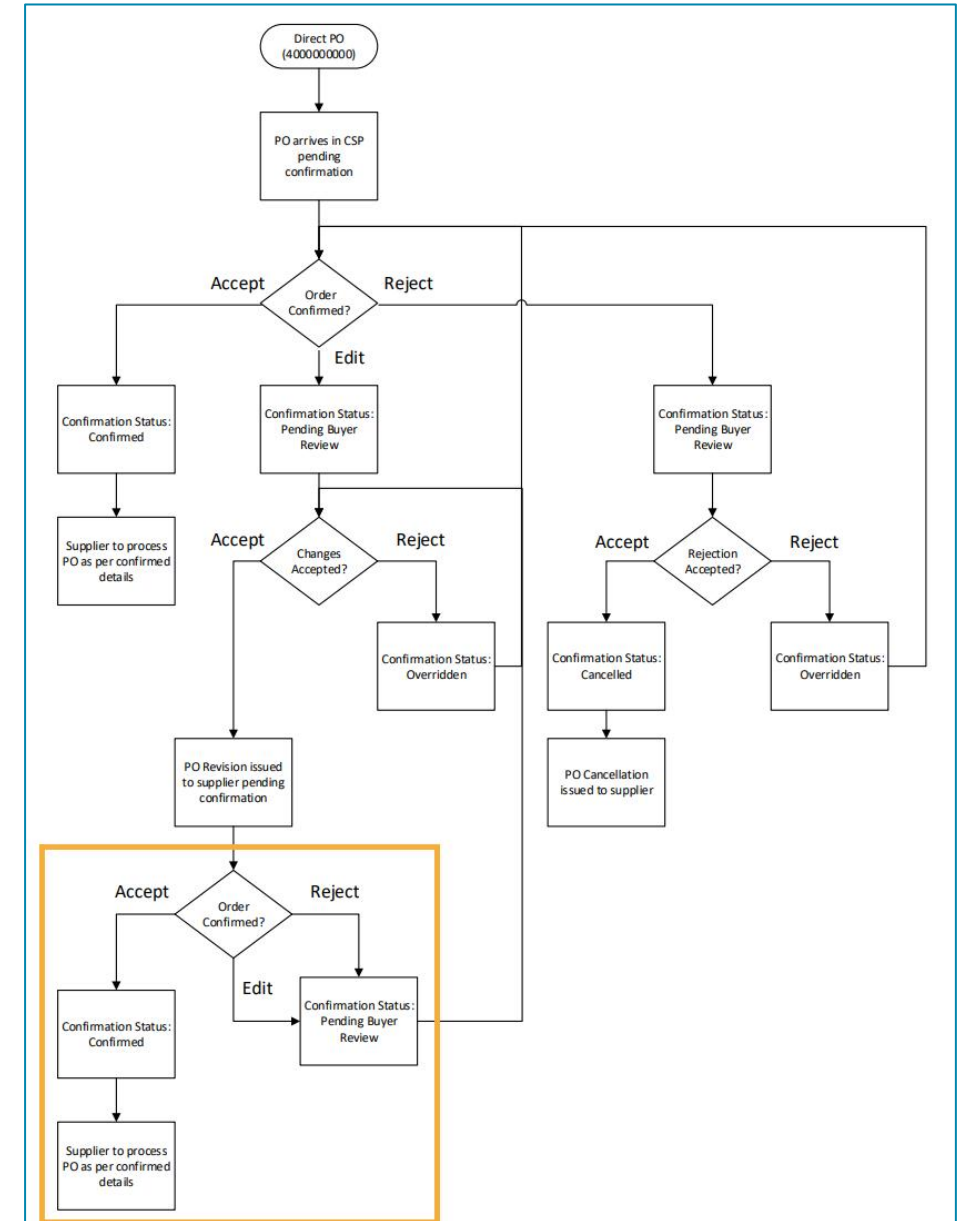


A summary of the various scenarios possible during the **PO Confirmation** process is shown, by order type, beside.

### Direct Flowchart

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

### Indirect Flowchart



## 8. Advanced Shipping Notifications (ASNs)

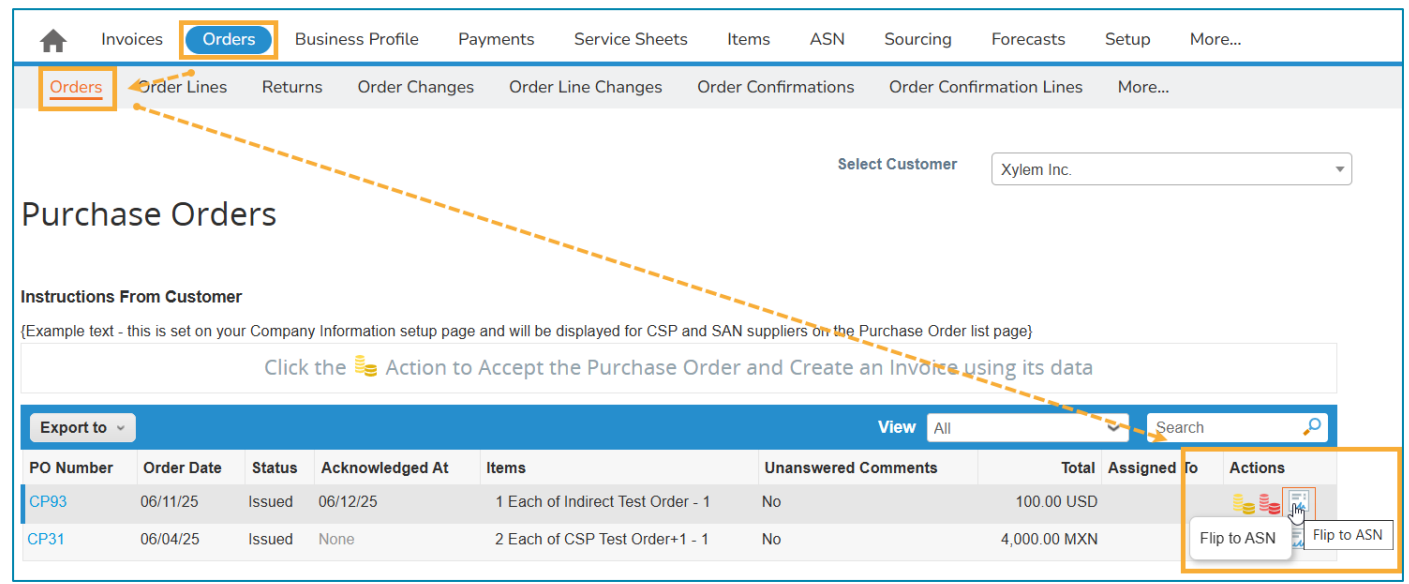
- a) Flip Purchase Order to ASN
- b) Submitting the ASN
- c) The ASN Menu
- d) ASN Statuses


# 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.



The screenshot shows the Xylem software interface. The top navigation bar includes 'Invoices', 'Orders' (highlighted), 'Business Profile', 'Payments', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Setup', and 'More...'. Below this, a sub-navigation bar includes 'Orders' (highlighted), 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', and 'More...'. The main content area is titled 'Purchase Orders' and includes a 'Select Customer' dropdown menu set to 'Xylem Inc.'. Below this is a section for 'Instructions From Customer' with a text box containing: 'Click the  Action to Accept the Purchase Order and Create an Invoice using its data'. At the bottom, there is a table with columns: 'Export to', 'View', 'All', 'Search', 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'Unanswered Comments', 'Total', 'Assigned to', and 'Actions'. The table contains two rows of data. The 'Actions' column for the second row (CP31) is highlighted, showing a 'Flip to ASN' button.

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		
				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

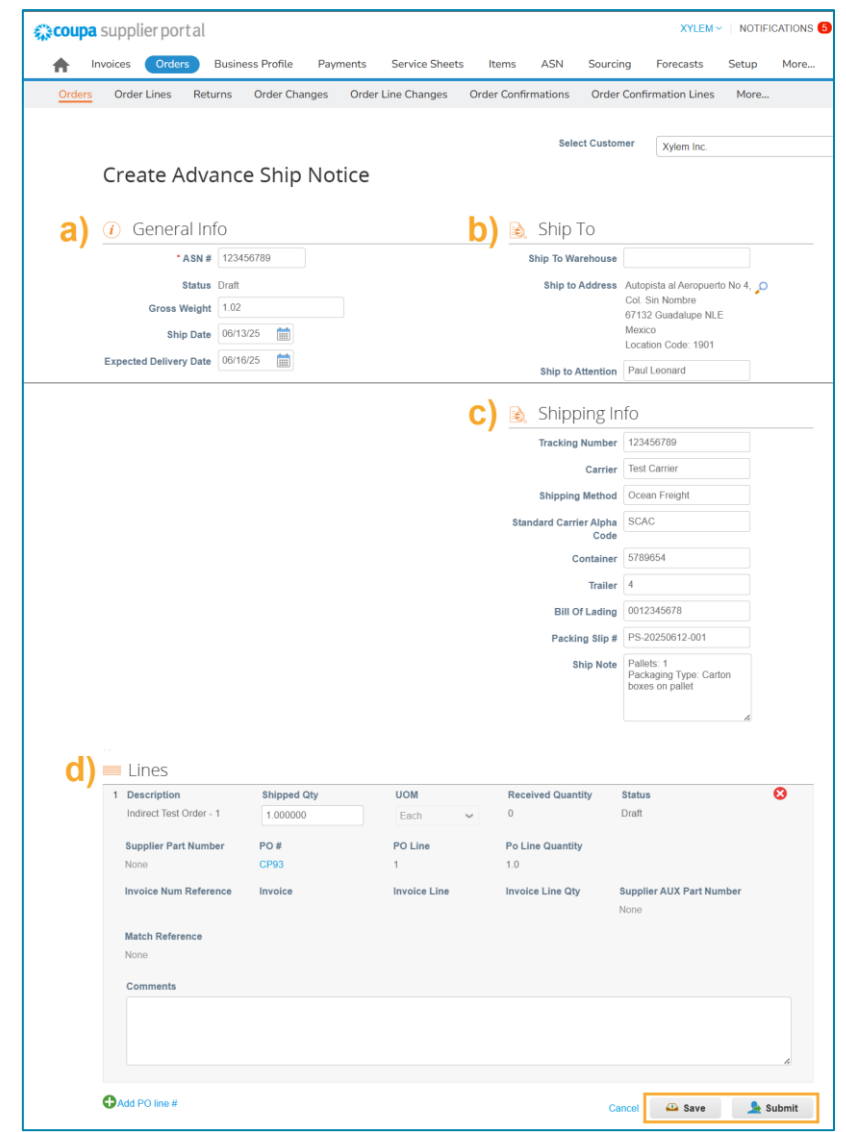
The **Create Advance Ship Notice** page will then display, containing the following sections;

- 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

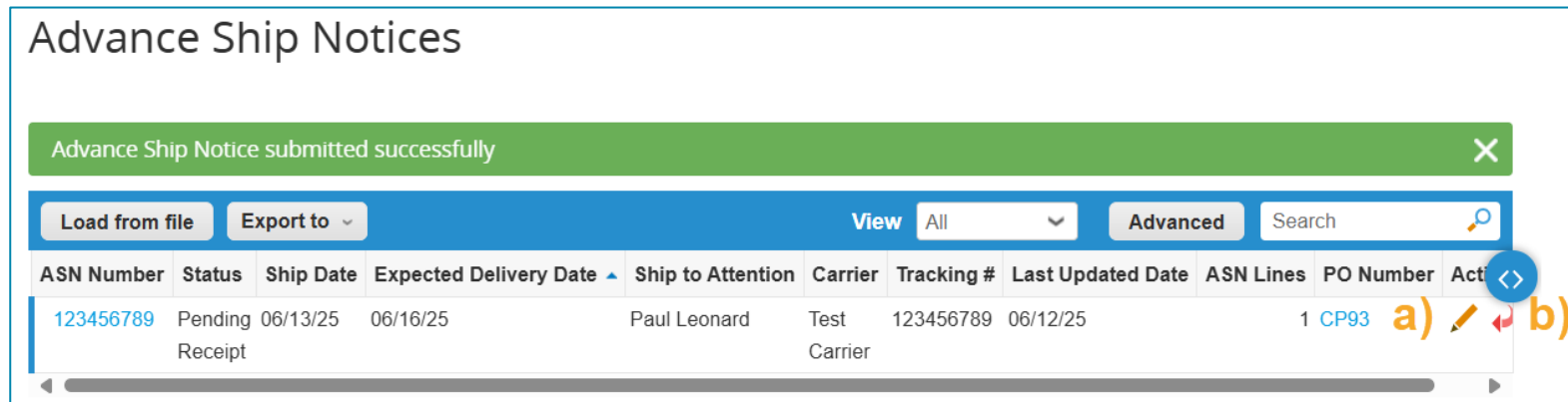
After clicking **Submit** you will automatically enter the **ASN** menu and be notified of the ASN's successful creation via a green banner (see below).






and be notified of the ASN's successful creation via a green banner (see below).

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).



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. Invoicing

- 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. Invoicing

## Xylem Expectations

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

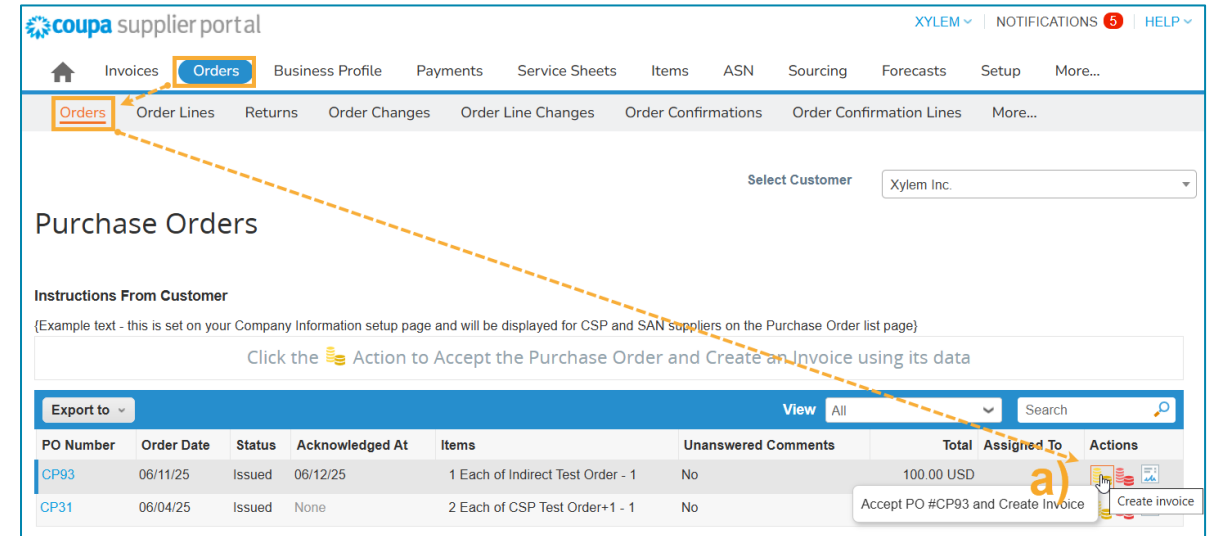
**Failure to submit invoices via the CSP and/or without referencing a valid PO number may result in rejections or delays** in payment processing.

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

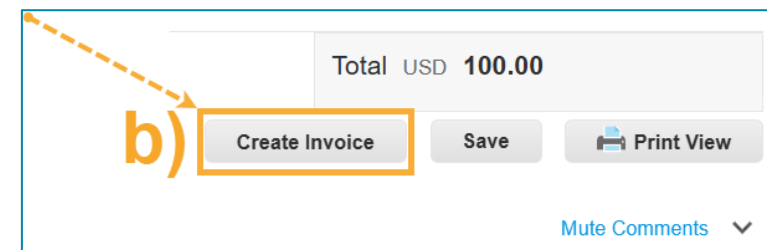
To generate an invoice from a PO, please either:

- 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.



OR



# 9b. Invoicing

## 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 shows the 'Create Invoice' form in the Coupa Supplier Portal. The form is divided into three main sections: a) General Info, b) Lines, and c) Totals & Taxes. Section a) includes fields for Invoice #, Invoice Date, Payment Term, Currency, Status, Image Scan, Supplier Note, Attachments, Supplier, Supplier Tax ID, Invoice From Address, Remit To Address, and Ship From Address. Section b) shows a table for Lines with columns for Type, Description, Qty, UOM, Price, and Total. Section c) includes fields for Shipping, Tax, Tax Reference, Handling, and a summary table for Totals & Taxes.

# 9c. Invoicing

## 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.

The screenshot shows the 'Create Invoice' form with the following fields and values:

- General Info:**
  - Invoice #: CP93-1 Test Invoice 1 (with a green checkmark)
  - Invoice Date: 06/12/25
  - Payment Term: 30 Days Net (with 'Get Paid Faster' button)
  - Currency: USD
  - Status: Draft
  - Image Scan: Choose File (Test Invoice.pdf)
  - Supplier Note: (empty text area)
  - Attachments: Add File | URL | Text
- From:** (highlighted with an orange box)
  - 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
  - Buyer VAT ID: SMS910520NZ8
  - Ship to Address: Autopista al Aeropuerto No 4, Col. Sin Nombre

The 'Choose Invoicing Details' dialog box shows the following options:

- Legal Entity:** Xylem CSP Test+1 (with 'Add New' button)
- Invoice From:** 301 Water Street SE, Washington, DC 20003, United States (53-1234567)
- Remit-To:** Select (with 'Add New' button)
- Ship From Address:** Select

A dropdown menu is open for 'Ship From Address', showing the following options:

- Addresses: 301 Water Street SE, Washington, DC 20003, United States (53-1234567)
- Bank Accounts: Test Bank \*\*\*011 (301 Water Street SE, Washington, DC 20003, United States)

# 9d. Invoicing

## 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.

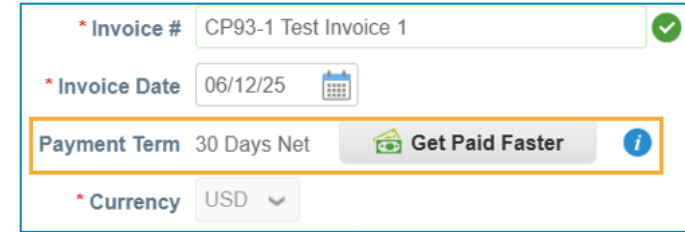
**Therefore, if you change your mind about the terms, you will need to request a new purchase order.**


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

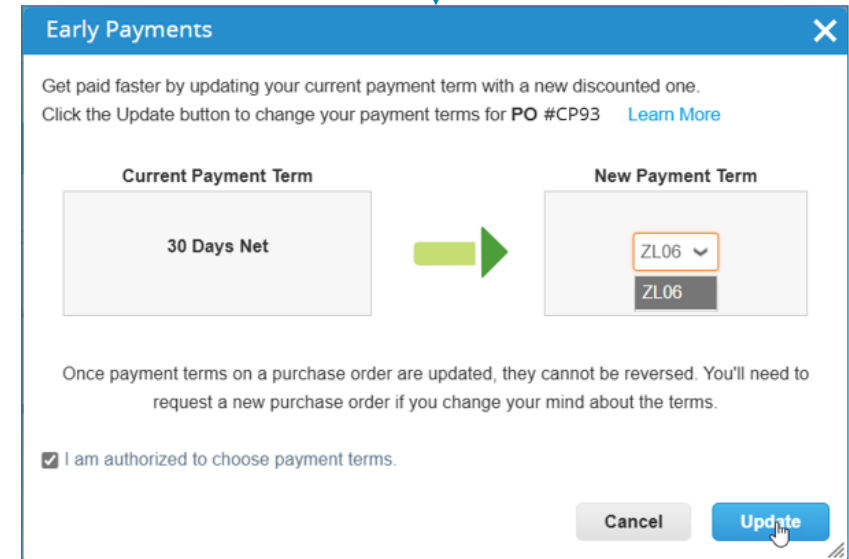
Once selected, you will first be required to confirm that **'I am authorized to choose payment terms.'**, before clicking **'Update'**.

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.



\* Invoice # CP93-1 Test Invoice 1 ✓  
\* Invoice Date 06/12/25  
Payment Term 30 Days Net  Get Paid Faster ⓘ  
\* Currency USD



Early Payments ✕

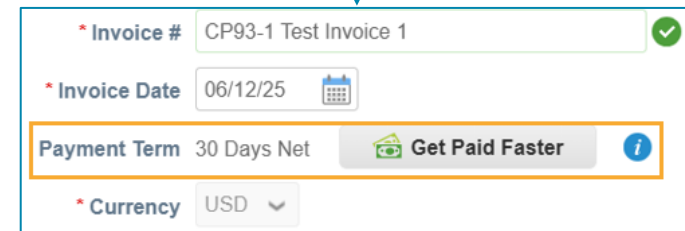
Get paid faster by updating your current payment term with a new discounted one.  
Click the Update button to change your payment terms for PO #CP93 [Learn More](#)


Current Payment Term		New Payment Term
30 Days Net	➔	ZL06 ZL06

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.

I am authorized to choose payment terms.

Cancel Update



\* Invoice # CP93-1 Test Invoice 1 ✓  
\* Invoice Date 06/12/25  
Payment Term 30 Days Net  Get Paid Faster ⓘ  
\* Currency USD

# 9e. Invoicing

## 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. Invoicing

## 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**.

The screenshot shows the 'Lines' form with the following fields and sections:

- Line Details:** Type (shopping cart icon), Description (Indirect Test Order - 1), Qty (1.000000), UOM (Each), Price (100.00).
- PO Line:** CP93-1, Clear button.
- Service Sheet Line:** None.
- Contract:** Dropdown menu.
- Credit Line:** None, Clear button.
- Supplier Part Number:** Input field.
- Billing:** CHANGE ME-CHANGE ME-CHANGE ME-6851600001.
- Taxes:** Table with columns: Tax Description (dropdown), Tax Rate (0.000), Tax Amount (0.00), Tax Reference (input field).
- Totals & Taxes:**
  - Lines Net Total: 100.00
  - Lines Tax Totals: 0.00
  - Shipping: 10
  - Tax: dropdown, %, 0.000
  - Tax Reference: Enter a tax reason description.
  - Handling: input field
  - Tax: dropdown, %, 0.000
  - Tax Reference: Enter a tax reason description.
  - Total Tax: 0.00
  - Net Total: 100.00
  - Total: 100.00**
- Buttons:** Delete, Cancel, Save as Draft, Calculate (highlighted), Submit (highlighted).

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

# 9g. Invoicing

## 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.

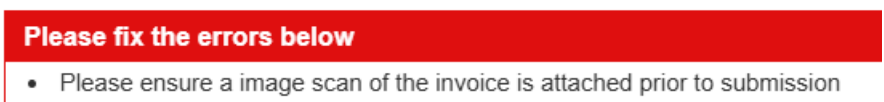
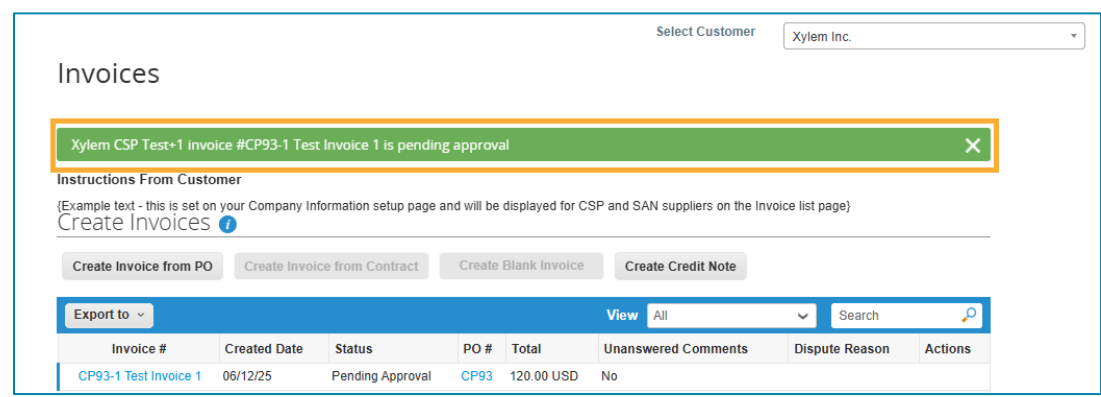
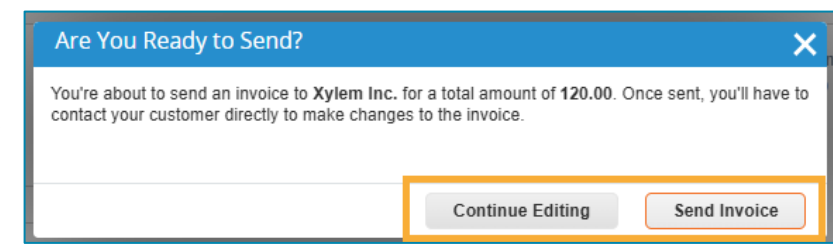
If the submission is successful, you will automatically enter the **Invoice** menu   and be notified of the invoice's successful creation via a green banner (see right).

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](#)



# 9h. Invoicing

## 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 perform any **Actions** displayed.

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

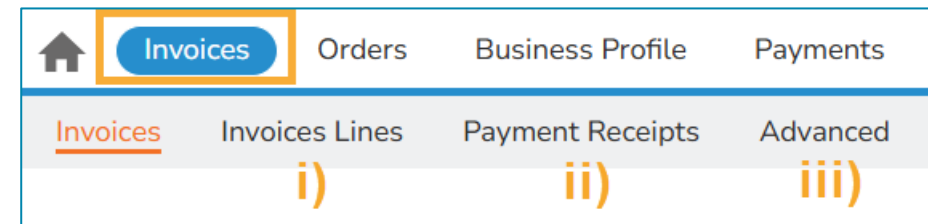
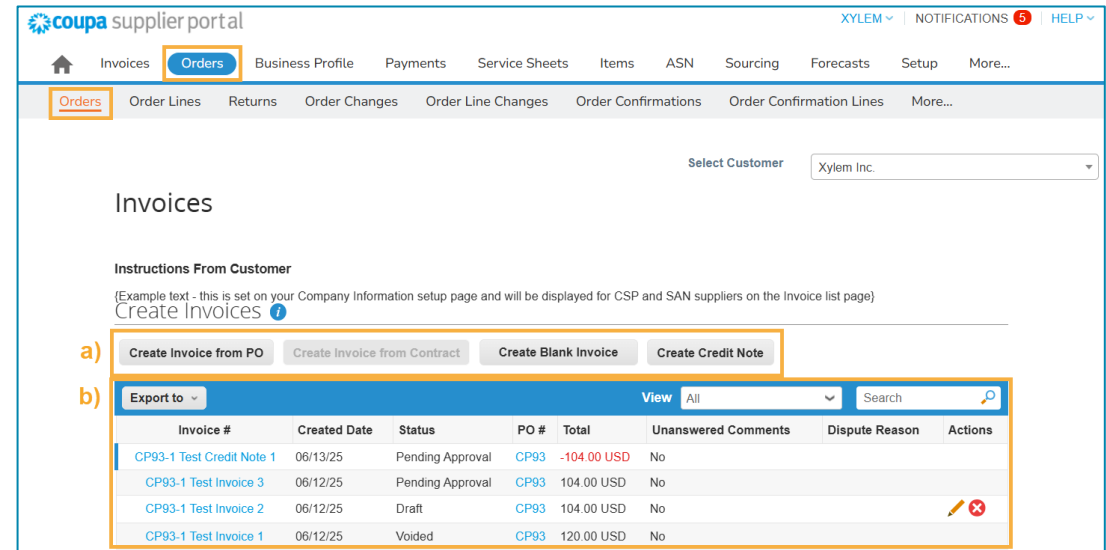
A full overview of statuses can be found on the [section 9i](#).

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. Invoicing

## 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 <a href="#">Disputed invoices</a> .
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. Invoicing

## 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. Invoicing

## 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	<b>CSP</b> – Create Blank Invoice	<a href="#">Seminario web de formación sobre el Portal de proveedores de Coupa (CSP) 2</a>	Watch from 25:10 onwards
India	Yes	Yes	N/A	<a href="#">Coupa Supplier Portal (CSP) Training Webinar 1   Xylem India</a>	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

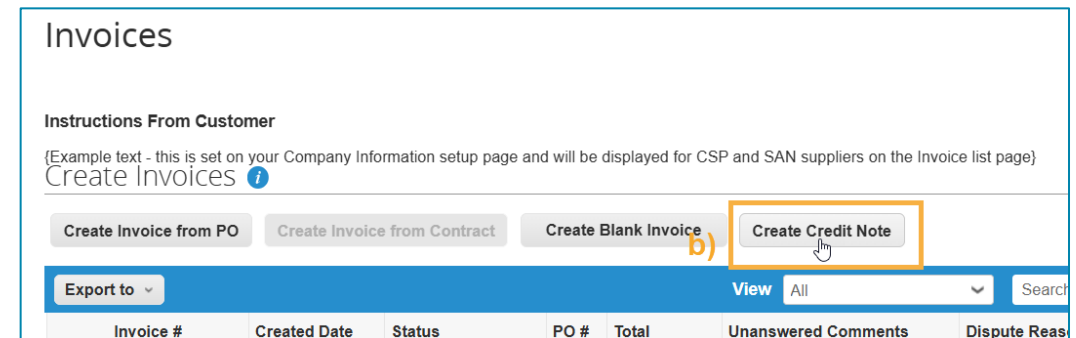
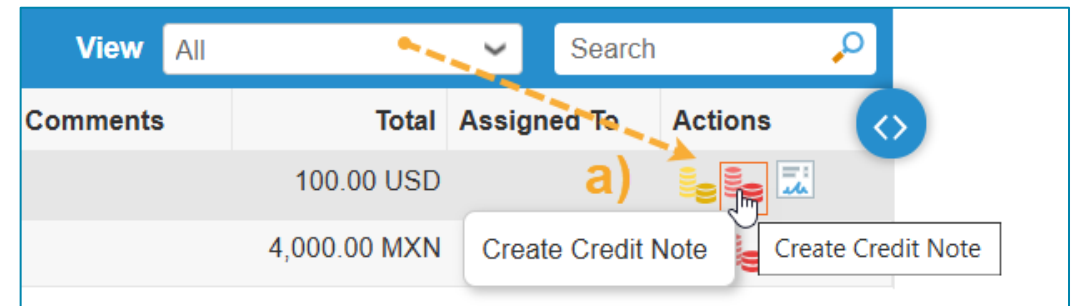
A credit note, like an invoice, can be generated by two methods:

- 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**.

The screenshot shows the 'Lines' interface with the following components:

- Line Header:** Adjustment Type (Quantity), Type (Shopping cart icon), Description (Indirect Test Order - 1), Qty (-1.0), UoM (Each), Price (100.00), and a total of -100.00.
- PO Line:** PO Line (CP93-1), Service Sheet Line (None), Contract (dropdown), and Supplier Part Number (input field).
- Billing:** CHANGE ME-CHANGE ME-CHANGE ME-6851600001
- Taxes:** A table with columns for Tax Description, Tax Rate, Tax Amount, and Tax Reference. The Tax Rate is 0.000 and Tax Amount is 0.00.
- Summary Section:** Includes Shipping (-2), Tax (0.000), and Handling (-2), each with a dropdown menu and a tax reference input field.
- Totals & Taxes:** A summary table showing Lines Net Total (-100.00), Lines Tax Totals (0.00), Total Tax (0.00), Net Total (-104.00), and Total (-104.00).
- Buttons:** Delete, Cancel, Save as Draft, Calculate, and Submit.



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

# 10d. Credit Notes

## Successful and Unsuccessful Submissions

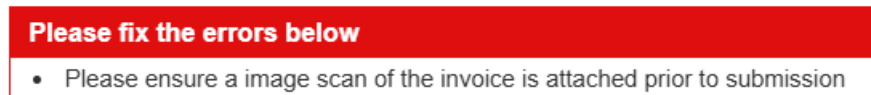
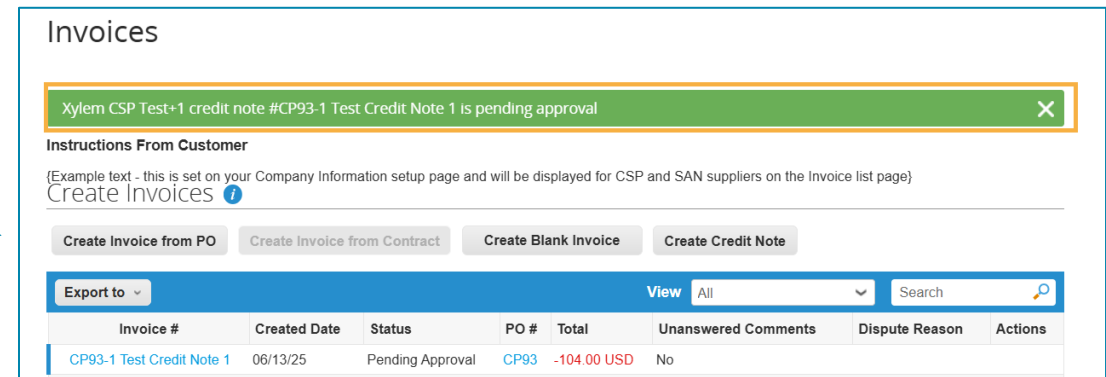
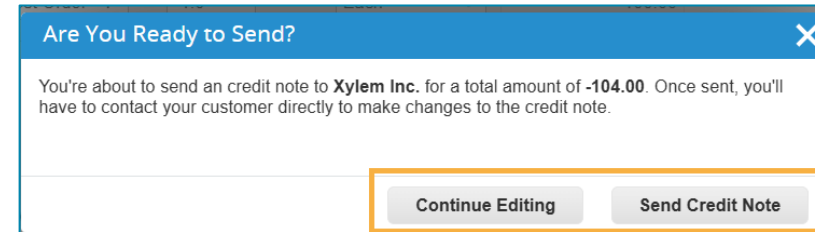
Given you cannot change the credit note once submitted, after clicking **Submit**, you will be prompted to confirm all details are correct.

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.



# 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

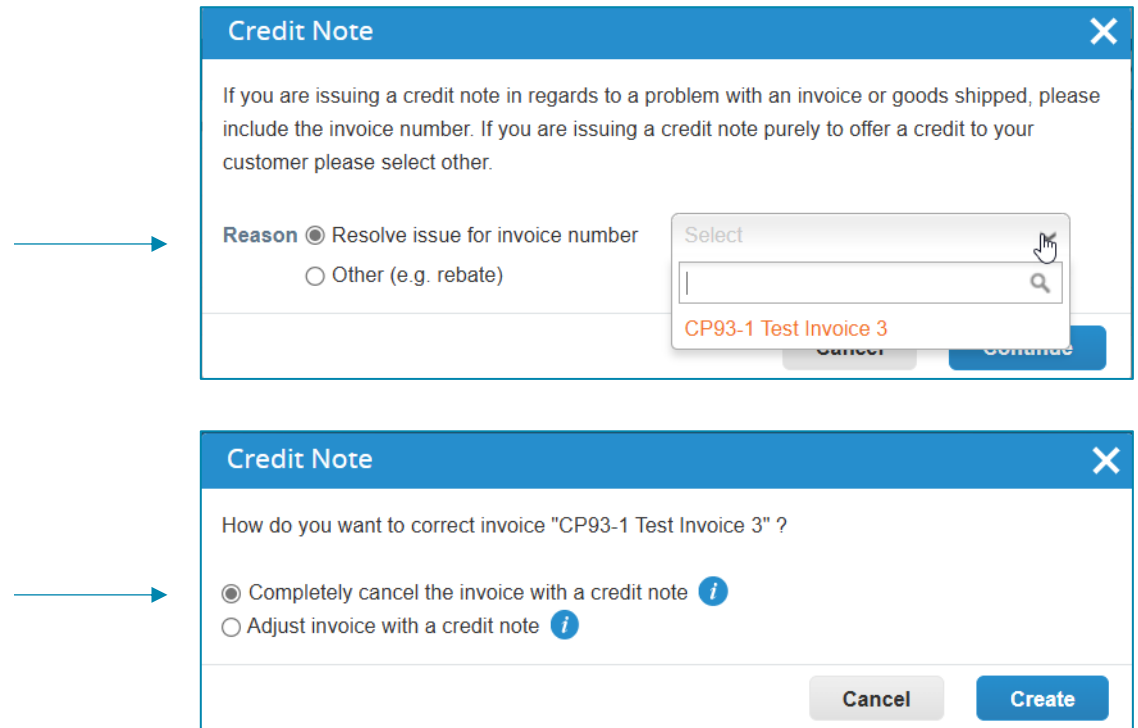
- i. Use **'Resolve issue for invoice number'** to credit invoices in a **disputed** status.
- ii. Use **'Other (e.g. rebate)'** to credit an invoice due to any other purpose.

### 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

If a full credit is selected, you will see the following message at the top of the resulting Credit Note submission screen...

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

# 11a. Payments

## Payments Information View

The CSP provides an overview of payment statuses, per invoice, via the **Payment Information** View of the **Invoices** menu.

The screenshot shows the Coupa supplier portal interface. The 'Invoices' menu is active, and a dropdown menu is open, highlighting the 'Payment Information' view. A dashed orange arrow indicates the navigation path from the 'Invoices' tab to the 'Payment Information' option.

The resulting view displays payment-specific info such as...

- **Paid** – Yes/No
- **Payment Term** – The Payment Term of the invoice, including any early payment discount term chosen at invoice submission.
- **Payment Information** – Including the payment run number, date of payment run and resulting payment currency and value.

The screenshot shows the 'Payment Information' view in the Coupa supplier portal. The table displays the following data:

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	CP4581	IN.CSP.005	Pending Approval	10/16/25	15 Days Net	10/16/25	
No	CP4581	IN.CSP.004	Approved	10/15/25	15 Days Net	10/15/25	
No	CP4581	IN.CSP.003	Approved	10/13/25	15 Days Net	10/13/25	
Yes	CP4522	IN.CSP.002	Approved	10/12/25	15 Days Net	10/12/25	Payment# 2000000065 on 10/12/25 for INR 50,034.65
Yes	CP4519	IN.CSP.001	Approved	10/12/25	15 Days Net	10/12/25	Payment# 2000000065 on 10/12/25 for INR 63,000.00
No	CP4522	123456789A	Approved	10/12/25	15 Days Net	10/12/25	

# 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](#).

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes a home icon, 'Invoices', 'Orders', 'Business Profile', 'Payments' (highlighted), 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Setup', and 'More...'. Below the navigation bar, there are two sub-menu items: 'Invoice Payments' (highlighted) and 'PO Payments'. The main content area is titled 'Invoice Payments' and shows a 'Select Customer' dropdown menu with 'Xylem DevS4 Inc.' selected. Below this, there is a section for 'Instructions From Customer' stating 'Payments made by Coupa Pay Customers will be displayed below'. There are two tabs: 'Remittance by Payment #' (selected) and 'Remittance by Invoice #'. Below the tabs, there is a table with columns: 'Payment #', 'Invoice #', 'Status', 'Payment Method', 'Payment Released Date', 'Total', and 'Actions'. The table is currently empty, showing 'No rows.' A yellow text box overlay reads '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.

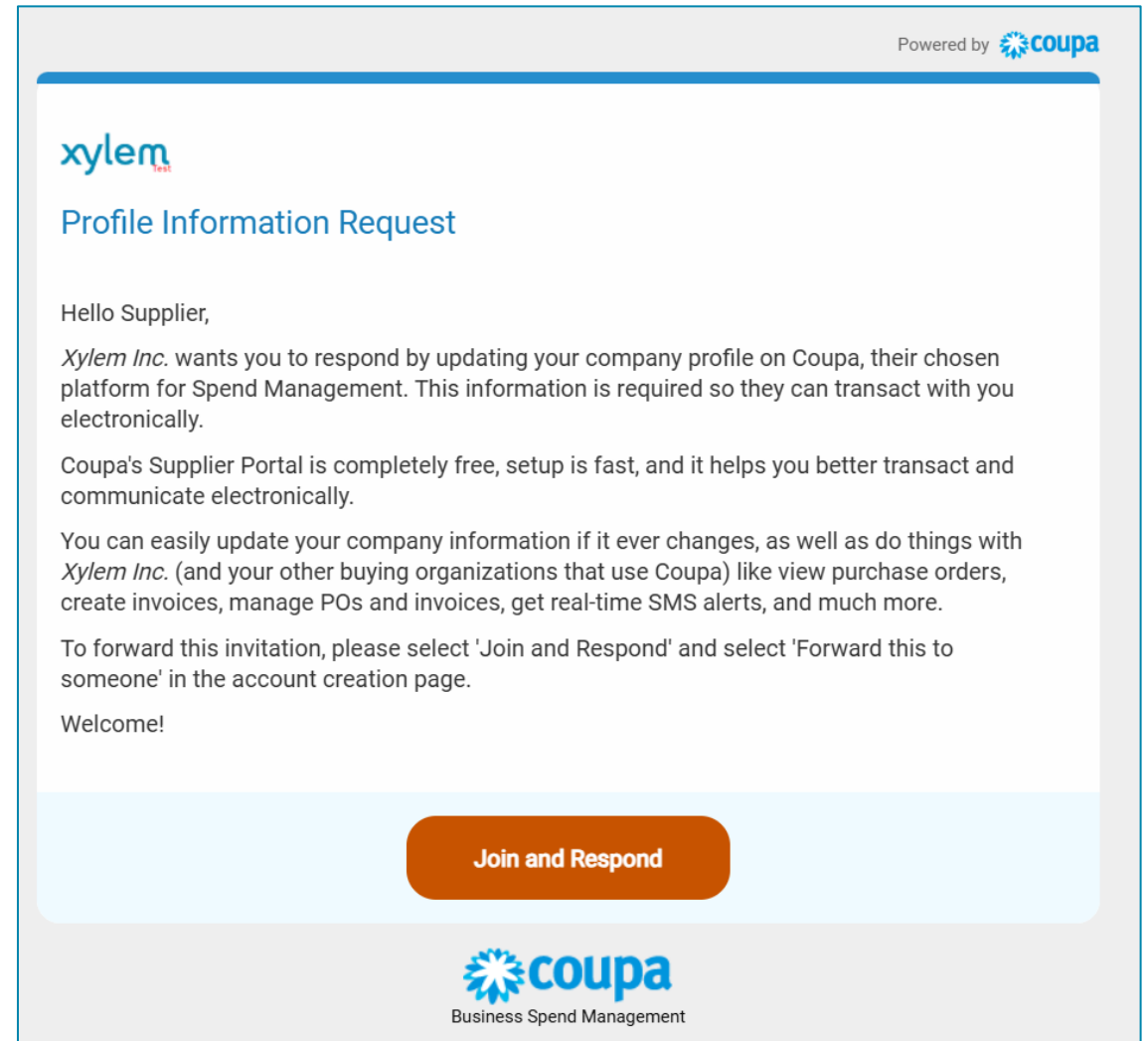
Typically, such requests will arrive to either:

- 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

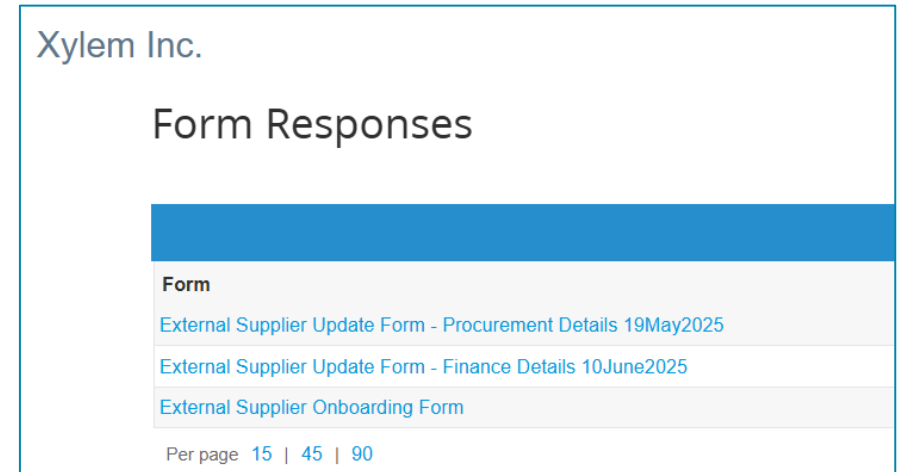
## The 3 SIM Form variants

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	✓	✓	✗



# 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.

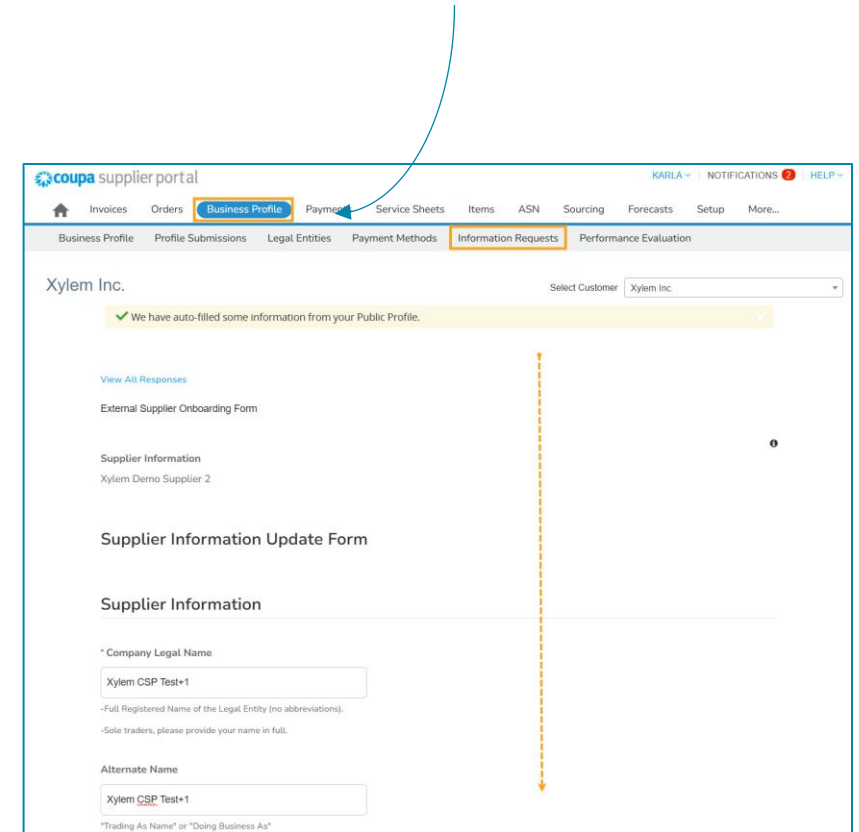
Once all details are completed, please click **Submit for Approval**.

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.



# 13. Support

## Who to contact?

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

**CoupaHelpDesk@xylem.com**

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**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](mailto:supplier@coupa.com)



Thank you for your  
continued cooperation