Focusing on our core utility businesses

S2P Hub (Coupa): Contract Services Billing (CSB) Training Guide

Supplier

CenterPoint® Energy

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Introduction to Contract Services

Introduction to Contract Services

The intent of this manual is to provide step by step instructions for creating invoices using the Coupa Supplier Portal for Contract Services Billing.

Contract Services Billing is a system which allows Contractors to access an Internet Website and enter payment requests electronically.

Current State vs. Future State

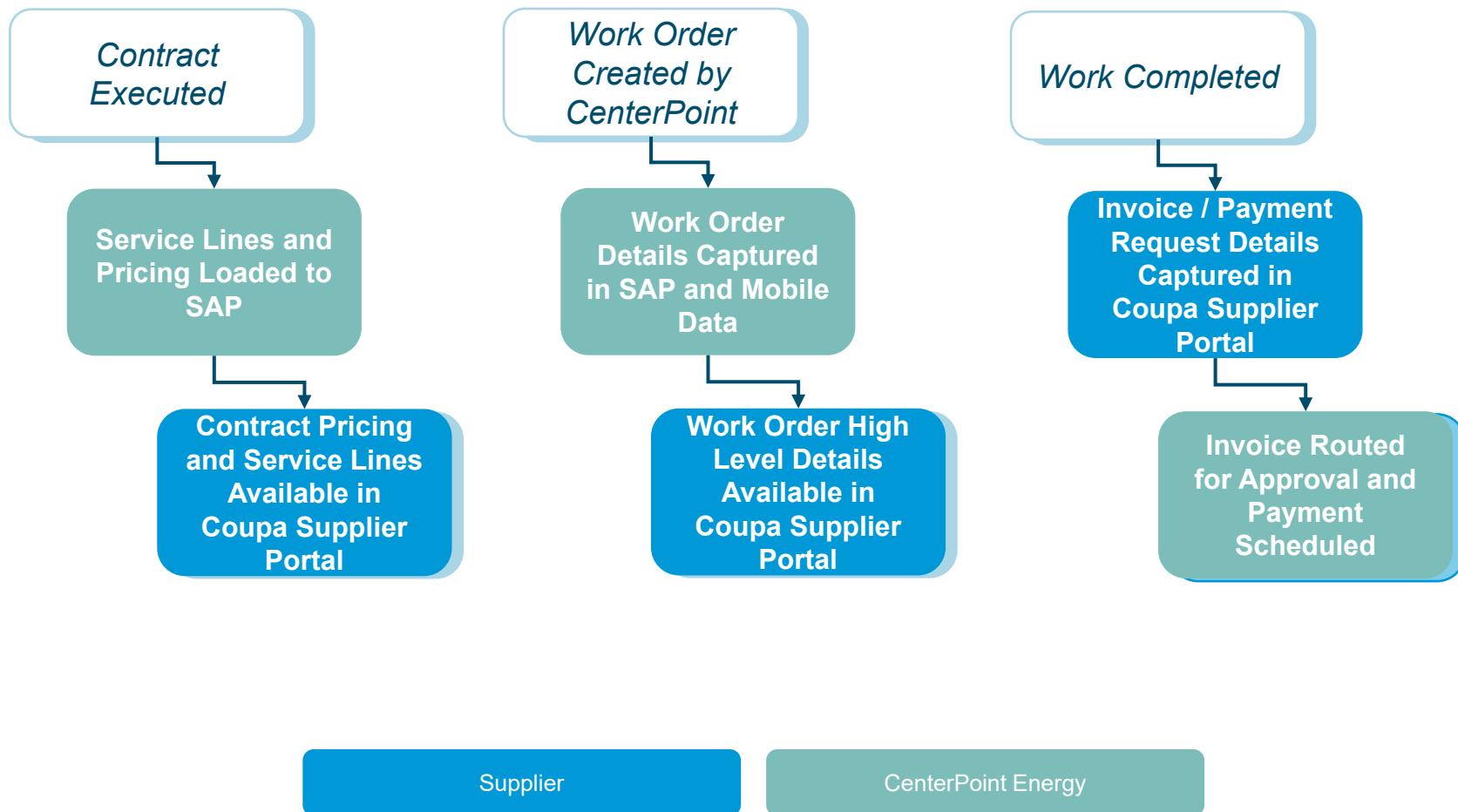| Current State	Future State
System • Work order creation in SAP • Vendor added to the work-table • Vendor marked as ERS • Service Master in SAP	**System** • Work order creation in SAP • Vendor added to the work-table • Vendor marked as ERS • Service Master in SAP and will integrate to S2P Hub (Coupa)
Contractor IDs • Procurement submits contractor credentials request to SailPoint	**Contractor IDs** • Contractor can create new log ins within the S2P Hub (Coupa) supplier portal for invoicing needs
Purchase Order Creation • Once the vendor submits the invoice, a PO is created in SAP for Payment	**Purchase Order Creation** • After all approvals have taken place in S2P Hub (Coupa), the PO will integrate to SAP for payment
Attachments • Invoice and work order attachments in the CSWBS portal	**Attachments** • Invoice attachments will be in the S2P Hub (Coupa) supplier portal; work order attachments will be in CSWBS portal

Supplier: Coupa Supplier Portal (CSP) Overview

Overview: Coupa Supplier Portal

The CSP is a free tool for you to easily do business with customers who use Coupa. Using the CSP, you can:

- Manage your company information
- Create Invoices
- Create Credit Memos
- Communicate regarding specific transactions

High Level Process Flow

Contract Executed
↓
Service Lines and Pricing Loaded to SAP
↓
Contract Pricing and Service Lines Available in Coupa Supplier Portal

Work Order Created by CenterPoint
↓
Work Order Details Captured in SAP and Mobile Data
↓
Work Order High Level Details Available in Coupa Supplier Portal

Work Completed
↓
Invoice / Payment Request Details Captured in Coupa Supplier Portal
↓
Invoice Routed for Approval and Payment Scheduled

Supplier	CenterPoint Energy

Accepting an Invitation to the CSP

Accepting an Invitation to the CSP

After you receive an invitation to join Coupa Supplier Portal

1. Click on **Join Coupa**. *Note: This email can also be forwarded to other members of the company.*

2. Set up your password. Click **Get Started.**

3. Fill out the relevant information for your company. Click **Next**.

4. Complete your profile.
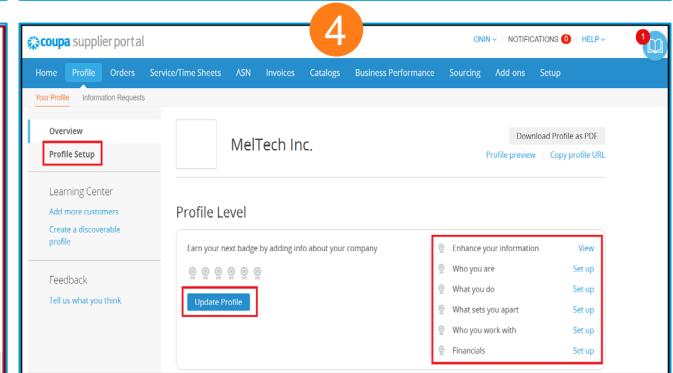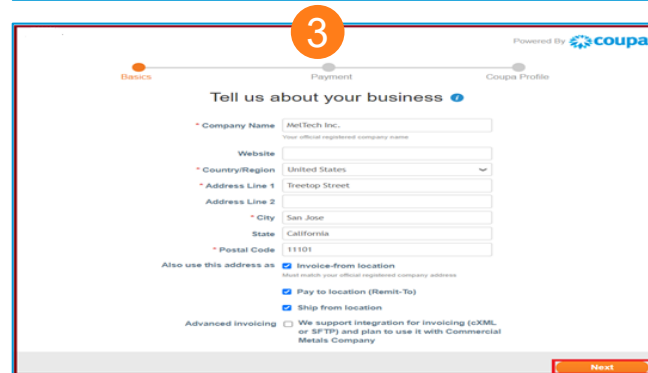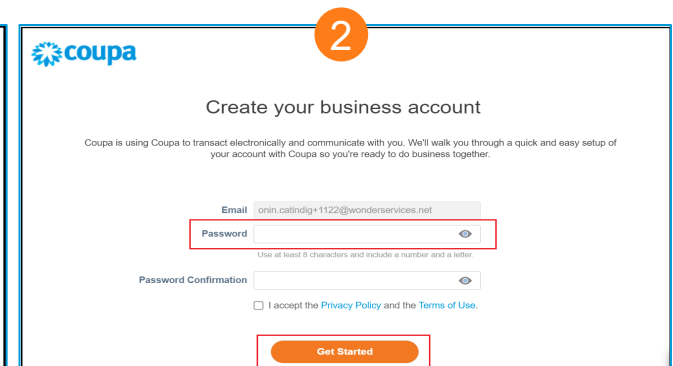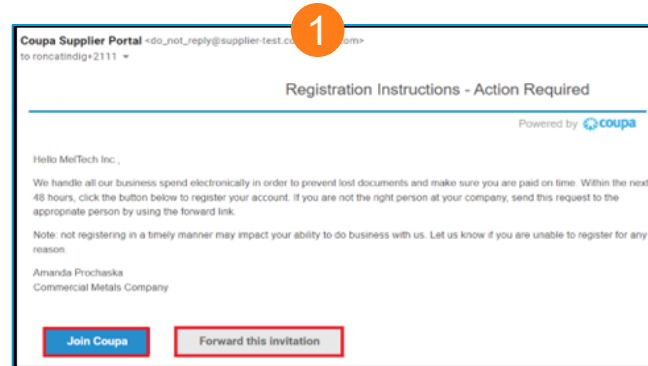
Note: you may be prompted to join Coupa Advantage for a fee. This is not required to complete your profile or to transact with CenterPoint Energy.

Connecting to CenterPoint Energy with an Existing CSP Account

Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.
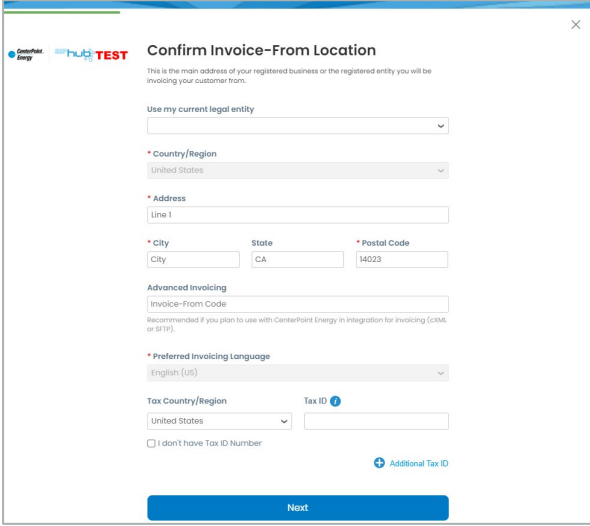
1. Upon receiving the notification from Coupa, click **Login to Coupa**.

2. Coupa Supplier Portal page will be displayed. Enter your credentials and click **Login**.

3. Once login credentials are setup, CenterPoint Energy will be added in your customer access list automatically.

4. Click Customer Setup.

5. Choose CenterPoint Energy's profile and complete the steps to finish the setup. Click **Start**.
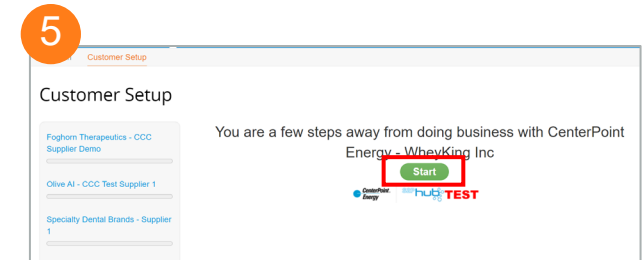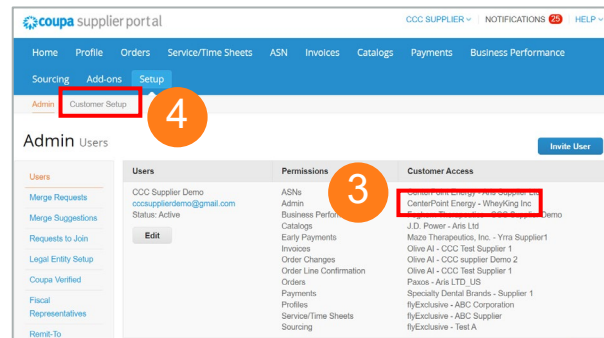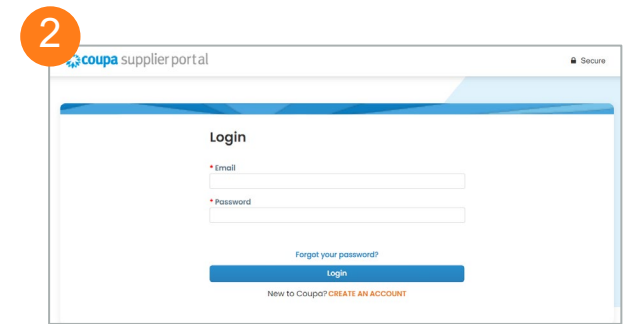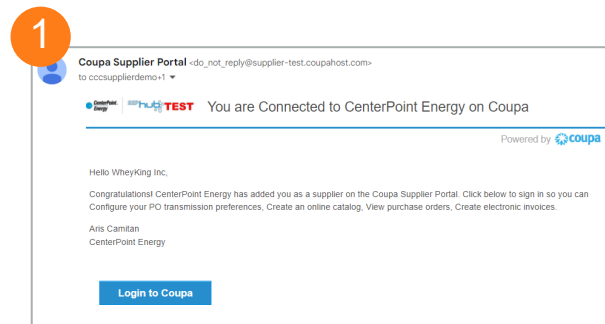
Connecting CenterPoint Energy to Current CSP Account

6. Confirm the Invoice-from Location, Ship-to from, etc. Once done, click **Next**.

7. Finish the setup until steps are completed and click **Finish**.
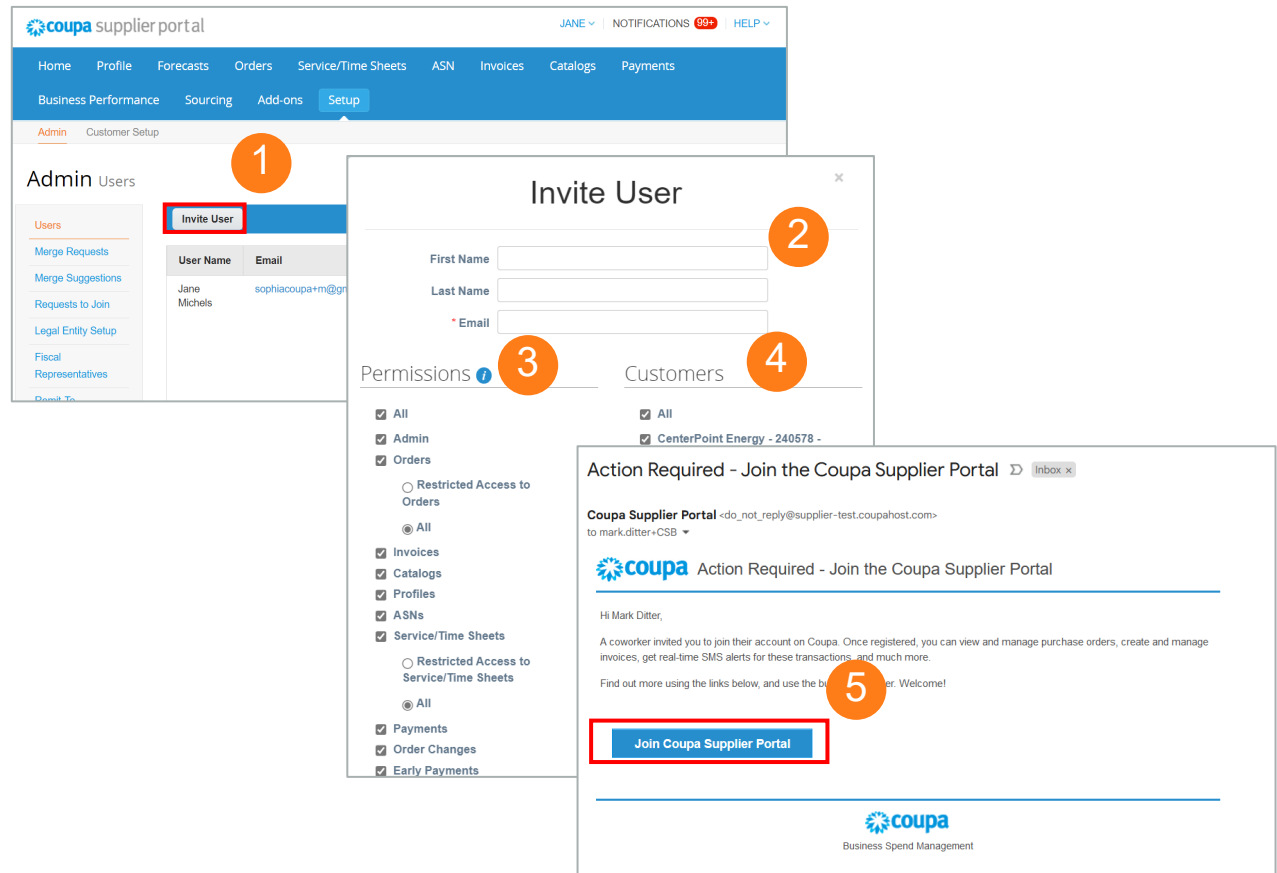
Self-Service Management of Contractor Users/Access to Coupa Supplier Portal

Management of Your Company's CSP User Access

As your organization changes, you have the ability to manage what users have access and what kind of access to the CSP. From the **Setup > Admin > Users** Tab the steps are below

1. Click the **Invite User** button to bring up the invitation form.

2. Populate the Name and Email of the co-worker.

3. Further review and adjust which Permissions they require.

4. Review the Customer who that user should support.

5. Once completed, an email will be sent to the user to accept and **Join Coupa Supplier Portal**

Combining/Linking Account

It is possible that your company has multiple entities in CenterPoint's systems, this may result in multiple invites to the CSP. You can merge accounts if desired to simplify and reduce logins. From the **Setup > Admin** Tab follow the steps are below:

1. Select **Merge Requests**

2. Enter the email address of the user who was invited to the CSP which you wish to merge.

3. Complete the CAPTCHA

4. Click the **Request Merge** button.

Managing Notifications

CSP - How to Manage Notifications

1. Hover your mouse over your name. Click Notification Preferences.

2. Click the type of notifications that you want to enable or disable.

3. Click Save.
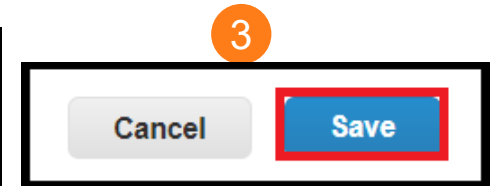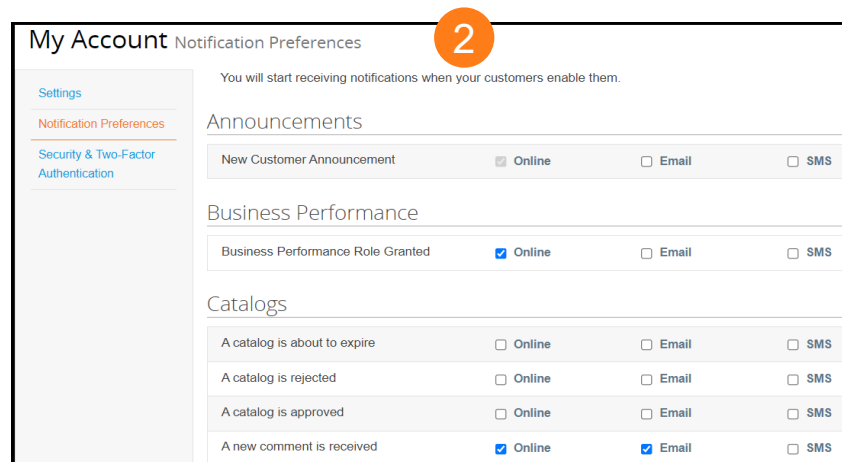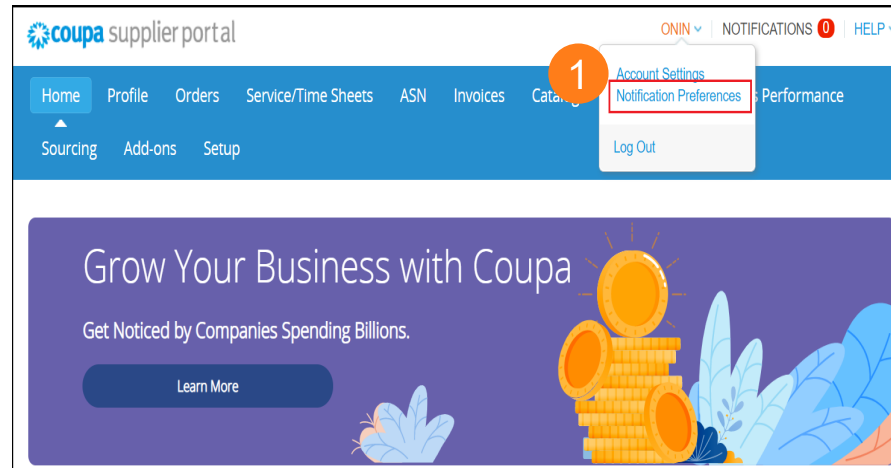
Supplier: Create Invoice with Lines from Contract (Contract Services)

Supplier : Create Invoice with Lines from Contract (Contract Services)

1. To start creating an Invoice, click on the **Orders** tab.
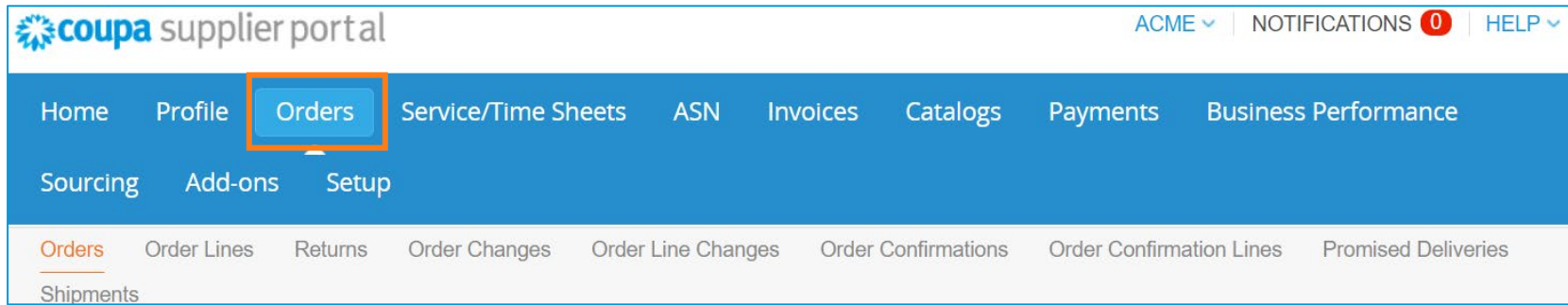
2. Search for the PO (work order) that you want to create an invoice for and click on the gold coins under **Actions.**

   Note: the PO number should begin with WO as shown in the green rectangle.

Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

3. A **Remit-To-Address** is required prior to creating an Invoice. If none is setup, then the system will prompt you to create one.

4. After creating the Remit-To-Address (if applicable), populate the Invoice details. Fields marked with red asterisk (*) are required fields.

   Note: Invoice numbers must be unique, or they will not be accepted –

   a green check mark ✅ *will appear if accepted.*

5. A dummy line will be included with "**Supplier – Please do not change or delete this line**" in the Description. Any additional lines will need to be added using the instructions on the next slide.

Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

6. To add lines from contract, click on "Pick lines from Contract" in the line item section of the invoice.

7. Select the required lines from the contract by clicking on "+" sign in the Actions column.
   *Note: Choose rates from the same **contract**, using the search function to find the right contracts and rates. Please ensure you are also picking from the correct OA Line Short Text (current rates).*
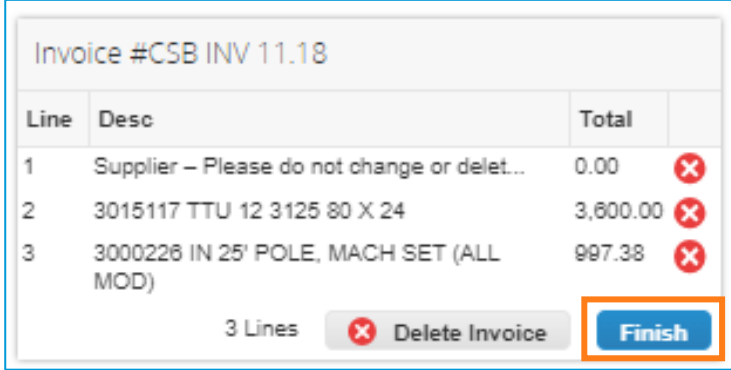

If your contract has modifiers, it will appear in the Part Number column. Example:

Part Number
12KV ESMNT

Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

8. After adding all the lines click "Finish"

9. Update the quantity of lines added from a contract

Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

10. Populate shipping and taxes as applicable.

11. Click Calculate to get the updated invoice total.
    Note: Please use this as a validation that what was selected matches the invoice total.

Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

12. Once invoice details are complete, click **Submit** and a pop up will appear for you to **Send Invoice** for CenterPoint approval.

Total Tax	0.00
Net Total	4,597.38
Total	**4,597.38**

Delete   Cancel   Save as Draft   Calculate   **Submit**

Are You Ready to Send? ✕

You're about to send an invoice to **CenterPoint Energy** for a total amount of 4,697.38. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing   Send Invoice

Supplier: Create Credit Note (Contract Services)

Note: CSB Credits __must be__ submitted the day after Invoice submission (due to need for Invoice to be integrated to SAP prior to crediting). If supplier ignores the warnings, the credit note will be blocked from approving. CNP will simply reject/dispute back to supplier to create a new Credit.

Supplier : Create Credit Note (Contract Services)

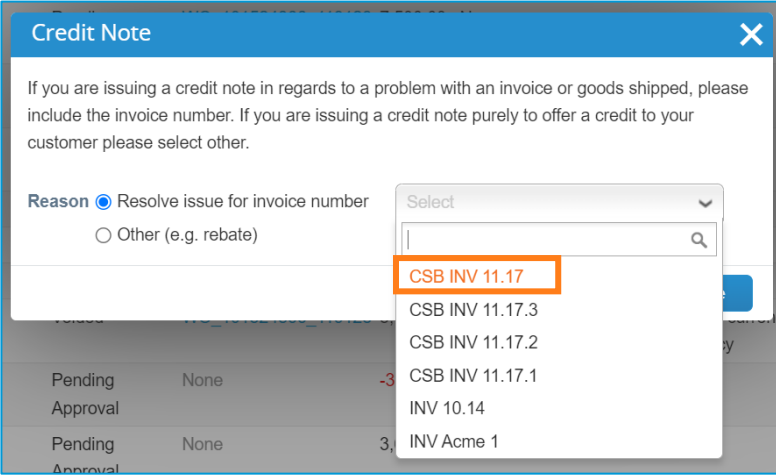1. Click on the **Invoices** tab to begin creating a Credit Note.
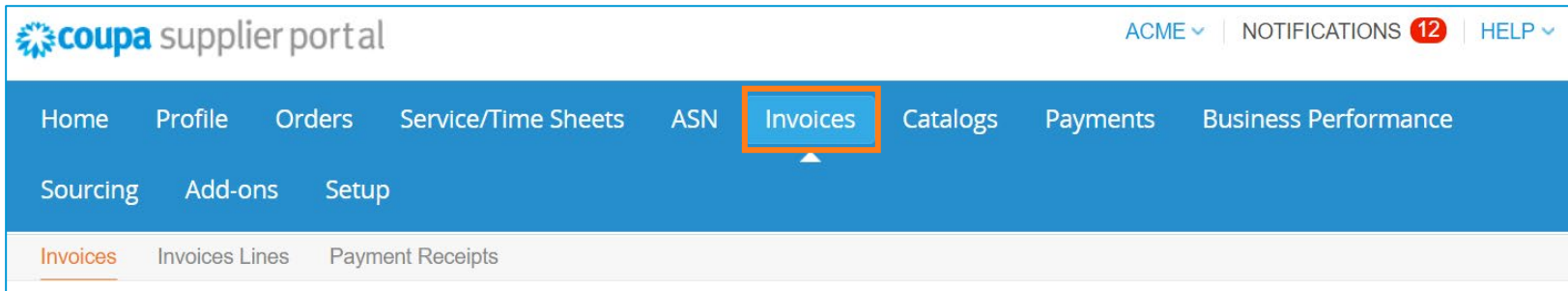
2. Click on the **Create Credit Note**
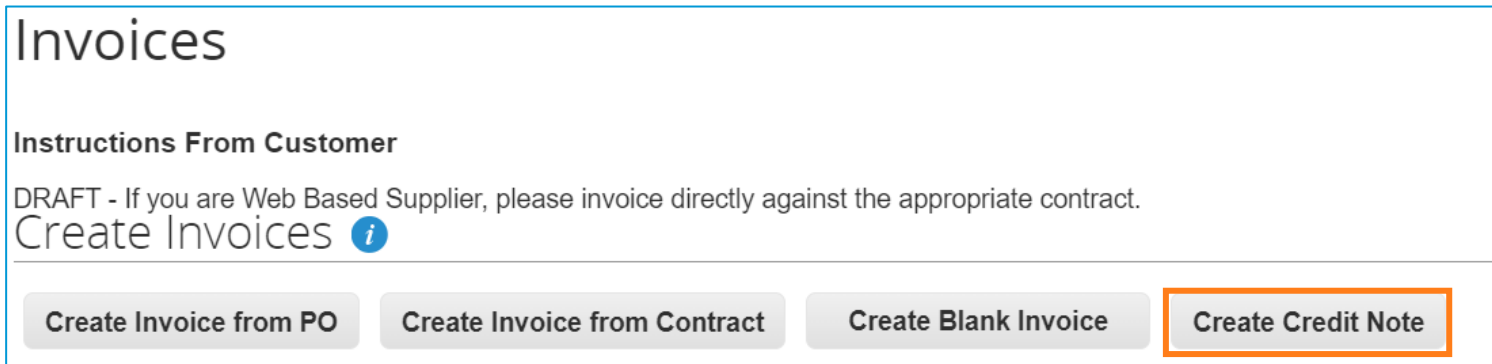
Supplier : Create Credit Note (Contract Services)

3. Click on **Resolve issue for invoice number** dropdown button and choose the invoice that needs to be credited.

4. You can select to **Completely cancel the invoice with a credit note** or **Adjust the invoice with a credit note**. For this example, we chose to *Completely cancel the invoice with a credit note* and then click **Create**.

Supplier : Create Credit Note (Contract Services)

5. Create Credit Note page will be displayed. Populate all required fields including the Credit Note #.

Note: We ask that you use the following naming convention for credit notes. If an invoice number is 1234, the note # should be 1234 CN.

Note: The Invoice Image scan field is required. Please upload the invoice document related to this Credit Note.

Supplier : Create Credit Note (Contract Services)

6. Review the Invoice line details and Total summary section, then click **Submit**.

Supplier : Create Credit Note (Contract Services)

7. Click **Send Credit Note**.

Are You Ready to Send?

You're about to send an credit note to **CenterPoint Energy** for a total amount of **-7,500.00**. Once sent, you'll have to contact your customer directly to make changes to the credit note.

Continue Editing   **Send Credit Note**

8. Once sent, the Credit Note will be processed by Centerpoint.

Invoices

119123 - Acme Pole Company credit note #CSB INV 11.17 CN 1 approved ✕

Supplier: Managing Disputed Invoices

Supplier : Disputed Invoice

1. If CenterPoint Energy has internally rejected then disputed an invoice, the status of invoice in CSP will change automatically to **Disputed**. The Dispute Reason column will list the reason the invoice has been disputed.

2. To resolve the dispute, click the **Resolve** button in the Actions column.

Supplier : Disputed Invoice

2. After clicking the Resolve button, the invoice page will open. You will have to options to resolve the disputed invoice:

- **Void –** Use the Void option when the invoice was issued as a duplicate or has already been paid. Clicking this option will cancel the invoice.

- **Correct Invoice -** Use this option to correct any detail needed for the invoice to be resubmitted and approved. Clicking this option will open the invoice and unlock editable fields. Reference the Dispute Reason column and the comment section for details as to why the invoice was disputed. *Note: Do not delete the $0.00 dummy line when resubmitting a corrected invoice.*
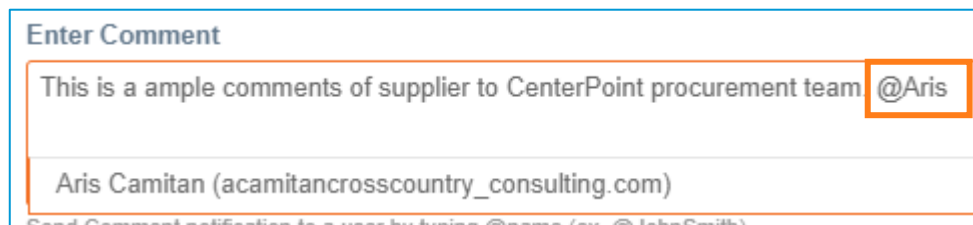
Supplier: Using the Comments Feature

Supplier : Comment Features

Under each invoice document in CSP, suppliers can send comments to and receive comments from the CenterPoint Energy team to communicate within the system. The Comments section is found at the bottom of the invoice page.
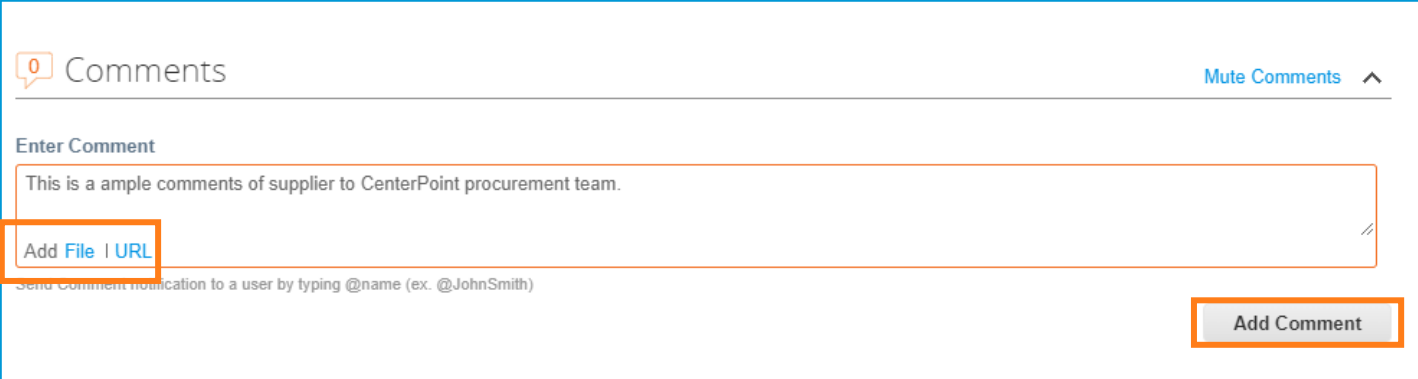

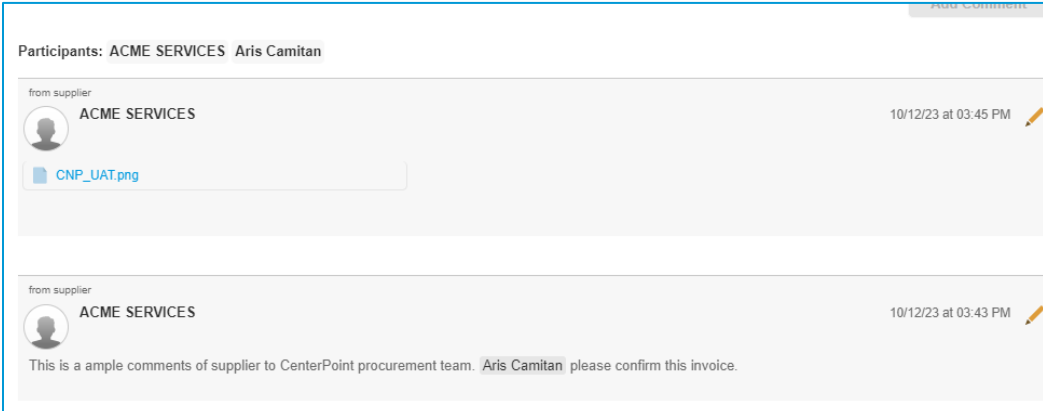Suppliers can also mention or tag a specific person from the CNP by using the @ symbol and typing the person's name.

Supplier : Comment Features

Attachments and URLs can be included in comments by clicking the respective buttons, shown below.

Once all comments are added, click **Add Comment** to submit the comments.

Supplier: Create Custom Views

Creating a Custom View (1/4)

The Coupa Supplier Portal includes several built-in views. If additional views are needed to find specific data, suppliers are able to create custom views. The below steps show the creation of an example custom views.

A report is needed for all **Contract Service Workorder POs.**
  1. Go to Orders tab, open the **View** drop down list by clicking on the dropdown arrow.

  2. Select **Create View**

Creating a Custom View (2/4)

3. Enter a name for the custom view.
   Note: The name must be less than 30 characters long.

4. Select the level of visibility. Selecting **Everyone** will share the view with every user in your organization.

5. Add as much detail as you desire by selecting more fields and setting up the conditions by clicking the "+" button.

Creating a Custom View (3/4)

6. Select the columns to include in your view by dragging them from the Available columns list and dropping them into the Selected columns list. Adjust the order of the columns by moving them up and down.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.
You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Additional Instructions	PO Number
Buyer	Order Date
Comments	Status
Payment Agreements	Acknowledged At
PO ID	Items
Work Order Info	Unanswered Comments
	Total
	Assigned To
	Actions

Creating a Custom View (4/4)

7. Select the field that will determine how the data is sorted. This field DOES NOT have to be moved to the selected column to apply. Note that the sort does not apply to exported data.

8. Click **Save**.

9. The new custom view is now available for review and export.

Thank You