



Supplier Resources

Invoicing

June, 2019



Introducing Coupa



What is Coupa

CNA has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic transactions.

- Coupa is a leading E-Procurement platform, connecting buyers with their suppliers
- “Coupa is an internet based solution capable of accommodating a variety of different systems” (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by CNA to request indirect materials and services, create and communicate purchase orders, and to receive invoices from suppliers
- The Coupa Supplier Portal (CSP) is free, there is no cost for suppliers



How Will You Benefit?

By working with CNA electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with CNA.

- Efficient Invoice Processing (PO Flip)
- Instant visibility into Purchase Order and Invoice Status
- Reduced Manual Paper Transaction Processing



Supplier Actionable Notification (Email Flip)

Transactions in Coupa Via Email


- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and invoice against those orders via Email
- As the Supplier you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons so depending on what you click you will be able to Create Invoice, Acknowledge PO or Add Comment to the PO
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



Create Invoices Via Email

Create Invoices via Email

To flip this PO into an invoice, click **Create Invoice**.




Continental Casualty Company Purchase Order #CO00000221

Create Invoice

Acknowledge PO

Add Comment

Login



Continental Casualty Company

PURCHASE ORDER

CNA Test Supplier

Attn: CNA Test Supplier

cnatestsupplier+test@gmail.com

PO NUMBER

CO00000221

DATE

06/13/19

PAYMENT TERMS



Create Invoices via Email

The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

Note: If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. Or if there is no Remit-To address stored, Coupa will ask you to create one.

If the correct remit-to address does not appear, click **Create New Remit-To**.

The screenshot shows the 'Create Invoice' interface. The background is a form titled 'Create Invoice' with a 'Create' button. It has sections for 'General Info' and 'From'. The 'General Info' section includes fields for 'Invoice #', 'Invoice Date' (06/13/19), 'Payment Term', 'Currency' (USD), 'Status' (Draft), 'Image Scan', and 'Supplier Note'. The 'From' section includes 'Supplier' (CNA Test Supplier_S-00), 'Supplier Tax ID' (None), and 'Invoice From Address' (CNA Test Supplier_S-00-CNA Test Location). A 'Choose Remit-To Address' pop-up is displayed in the foreground. It has a blue header with a close button. The list of addresses includes 'CNA Test Supplier_S-00-CNA Test Location', 'CNA Test Location', 'North Milwaukee', 'South City', 'Milwaukee, 73301', and 'United States'. The first address is highlighted with a green checkmark and a 'Choose' button. Below the list, there is a note: 'To use a Remit To from your account, please login to supplier.coupahost.com to create your invoice.' At the bottom of the pop-up are 'Cancel' and 'Create New Remit-To' buttons.


Note: If you create a new address, the invoice will be put “on hold” as the new remit-to address will need to be approved by the CNA AP team.

Create Invoices via Email

On the **Create Invoice** screen, input the invoice number into the **Invoice #** field.

**All required fields are indicated by an asterisk*

Note:
The **Invoice Date** is the **Start Date** for which payments will be made based on the supplier's negotiated **payment terms**.



Sign Out

Create Invoice


Create

General Info

* Invoice #

* Invoice Date

06/13/19



Payment Term

* Currency

USD

Status

Draft

* Image Scan

Browse...

Supplier Note

Attachments

Add

File

|

URL

|

Text

From

* Supplier

CNA Test Supplier_S-00

Supplier Tax ID

None

* Invoice From Address

CNA Test Supplier_S-00-CNA Test

Location

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Remit-To Address

CNA Test Supplier_S-00-CNA Test

Location

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301


United States



Create Invoices via Email


Scroll down to the **Lines** section and ensure all details are accurate, specifically the Price and the Quantity.

- Enter any shipping and handling information
- If applicable, add any tax in the proper section by one of the following methods:
 - Select a tax code from the Tax Code dropdown and click Calculate
 - Manually enter a tax percentage
 - Manually enter a tax amount (\$)
- Enter any comments for CNA and then click Add Comment.

 Add Line

Totals & Taxes

Lines Net Total	700.00		
Shipping	<input type="text"/>		
Handling	<input type="text"/>		
Tax	<input type="text" value="0"/>	%	<input type="text" value="0.00"/>
Total Tax	0.00		
Net Total	700.00		
Total	700.00		


 Delete

Cancel

Save as Draft

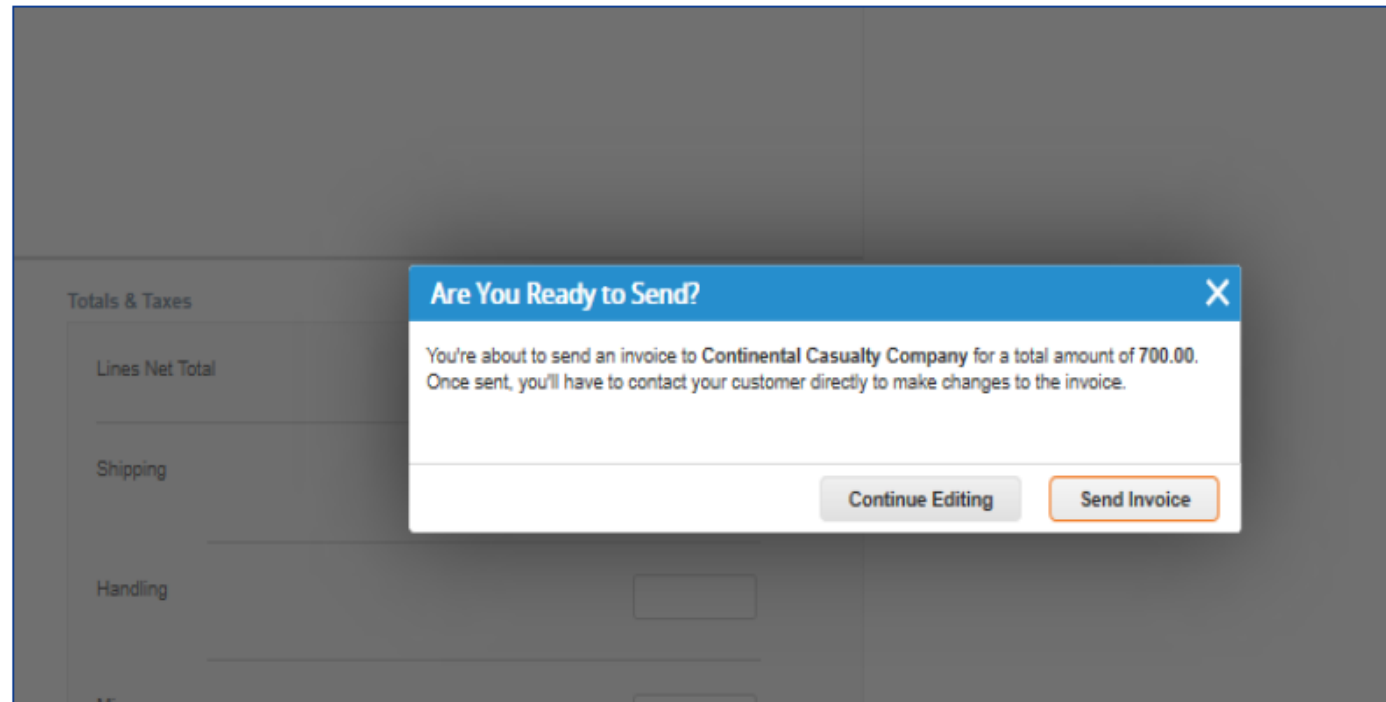
Calculate

Submit

 Comments

Create Invoices via Email


After you click Submit, a pop up appears to confirm if you are ready to send the invoice. Click **Send Invoice** to complete the process. Note that once submitted, the invoice cannot be changed.




Coupa Supplier Portal (CSP)

Email and CSP are Linked

- You will be notified of the status of your Purchase Order or Invoice via email.
- You can click **View Online** in the acknowledgement email to check the invoice status.



Invoice Invoice12345 is Approved to Pay by Continental Casualty Company

Powered by 

Good News,

Your Invoice Invoice12345 has been approved to pay by your customer, Continental Casualty Company. No further action is required but you can click below for real time status or additional details.


If your customer's process is to mark the Invoice as 'Paid' in Coupa, you will get a notification at that time with instructions for payment details.

If you have any questions you can simply contact your customer through normal channels or enter a comment on the Invoice.

Add ons Admin









Select Customer Continental Casualty Company

either through the Coupa Supplier Portal or directly from the information, including the bill-to and ship-to addresses, should

Create Invoices 

Create Invoice from PO Create Invoice from Contract Create Bill of Materials Create Credit Note

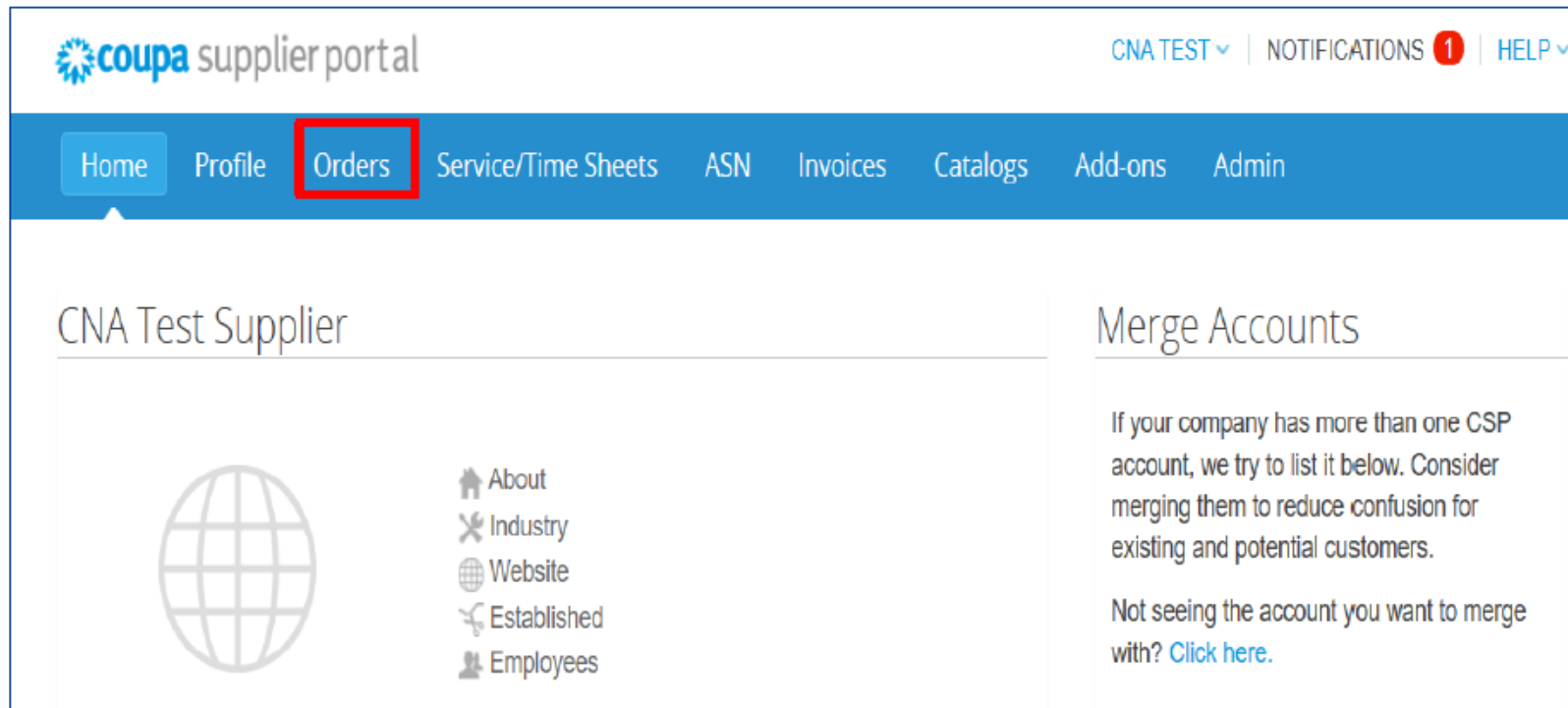
Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	06/13/19	Draft	C000000221	700.00	No	 
None	06/13/19	Draft	C000000221	700.00	No	 
Invoice12345	06/13/19	Approved	C000000221	700.00	No	
None	06/13/19	Draft	C000000221	700.00	No	 
None	06/13/19	Draft	C000000221	700.00	No	 


Create Invoices Via CSP

Create Invoices Via CSP


- Via the CSP you can create invoices directly from POs, often referred to as “flipping the PO”
- Click **Orders** from the Menu Bar.



Create Invoices Via CSP

- Find the PO you would like to flip into an invoice.
- Within that PO row, under the **Actions** column, select the yellow coin stack icon  to flip the PO into an invoice.

Note:
CNA is listed as **Continental Casualty Company** in the customer list of the Coupa Supplier Portal.

coupa supplier portal

CNA TEST | NOTIFICATIONS 2 | HELP

HomeProfileOrdersService/TIME SheetsASNInvoicesCatalogsAdd-onsAdmin

OrdersOrder Lines


Select CustomerContinental Casualty Company

Configure PO Delivery





Purchase Orders

Instructions From Customer

All purchases made by CNA (CNA Insurance Companies, and Continental Casualty Company) are subject to CNA's Terms and Conditions of Purchase in effect as of the date this purchase order or purchase request is issued to your company. CNA's Terms and Conditions of Purchase can be found on the Vendor Management page of the www.CNA.com website. If you have a contract, the Terms and Conditions of the contract will apply.

Click the  Action to Invoice from a Purchase Order

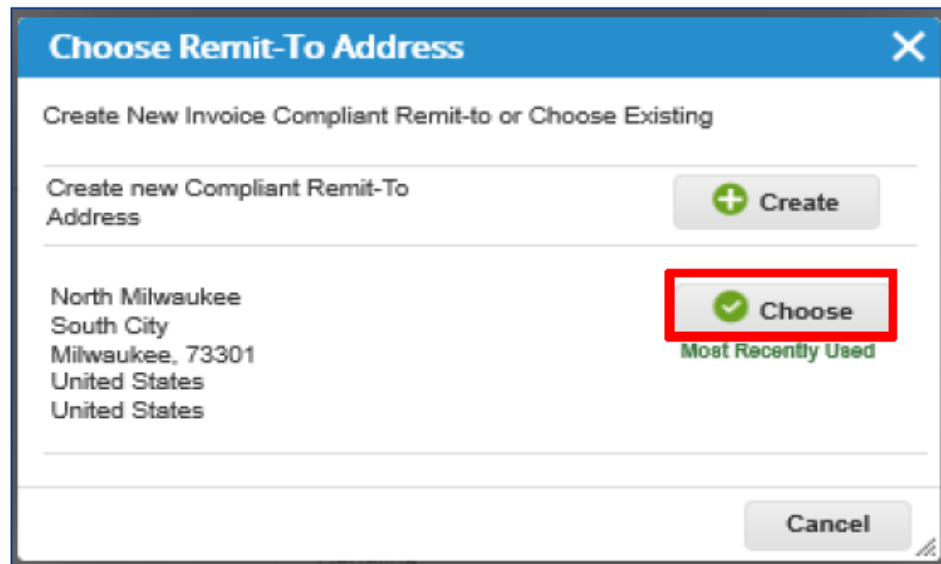
ViewAllSearch

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
CO00000223	06/13/19	Issued	None	1 Each of Desktop	No	700.00	 
CO00000221	06/13/19	Issued	06/13/19	1 Each of Desktop	No	700.00	 

Create Invoices Via CSP

- The page refreshes to display the create invoice screen.
- The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored, Coupa will ask you to create one.



Choose Remit-To Address

Create New Invoice Compliant Remit-to or Choose Existing

Create new Compliant Remit-To Address + Create

North Milwaukee
South City
Milwaukee, 73301
United States
United States

✓ Choose
Most Recently Used

Cancel

If the correct Remit-To Address does not appear and you would like to add that address, close the pop-up, save the invoice as a draft and then add a new Remit-To address to your profile.

Note: *If you submit an invoice with a new Remit-To address, the invoice will be put on hold until the new address is approved by the CNA AP team. When you submit the invoice, you will receive a message saying that it is on hold.*

Create Invoices Via CSP

On the **Create Invoice** screen, input the **Invoice #** and **Invoice Date**. Note that required fields are indicated with asterisks.

Note:

The **Invoice Date** is the **Start Date** for which payments will be made based on the supplier's negotiated **payment terms**.

Create Invoice

Create

General Info

* Invoice #

Invoice1234567

✓

* Invoice Date

08/13/19

Payment Term

▼

* Currency

USD

Status

Draft

* Image Scan

Choose File

KPMG_FORT...59700.pdf

Supplier Note

Attachments

Add

File

|

URL

|

Text

From

* Supplier

CNA Test Supplier_S-00

Supplier Tax ID

None

* Invoice From Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Remit-To Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Ship From Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

To

Customer

Continental Casualty Company



Create Invoices Via CSP



As you scroll down the page, in the Lines section you will find more fields to input information.

For a Goods PO:

- Enter a price into the **Price** field.
- Enter the quantity in the **Quantity** field.

Lines


☐ Line Level Taxation

Type	Description	Qty	UOM	Price	
	Desktop	1	Each	700.00	700.00 

PO Line

CO00000223-1


Contract



Supplier Part Number

Billing

06920-0000125--SC090-ALX1

 Add Tag



Create Invoices Via CSP

For a Services PO:

- Enter a price in the **Price** field. Since it is a Services only PO, only the amount is required.

Lines


☐ Line Level Taxation

Type	Description	Price	
	<input type="text" value="Services"/>	<input type="text" value="900.00"/>	900.00 

PO Line

CO00000224-1


Contract




Supplier Part Number

Billing

02360-0000104--SC002-FL20

 Add Tag

 Add Line

Totals & Taxes

Create Invoices Via CSP

- Enter any shipping and handling information.
- Enter any tax information
 - If applicable, add any tax in the proper section by one of the following methods:
 - Manually enter a **tax percentage**.
 - Manually enter a **tax amount** (\$)

Totals & Taxes

Lines Net Total	900.00
<hr/>	
Shipping	<input type="text"/>
<hr/>	
Handling	<input type="text"/>
<hr/>	
Tax	<input type="text"/> <input type="text"/> % <input type="text"/>
<hr/>	
Total Tax	18.00
Net Total	900.00
Total	918.00



Delete

Cancel

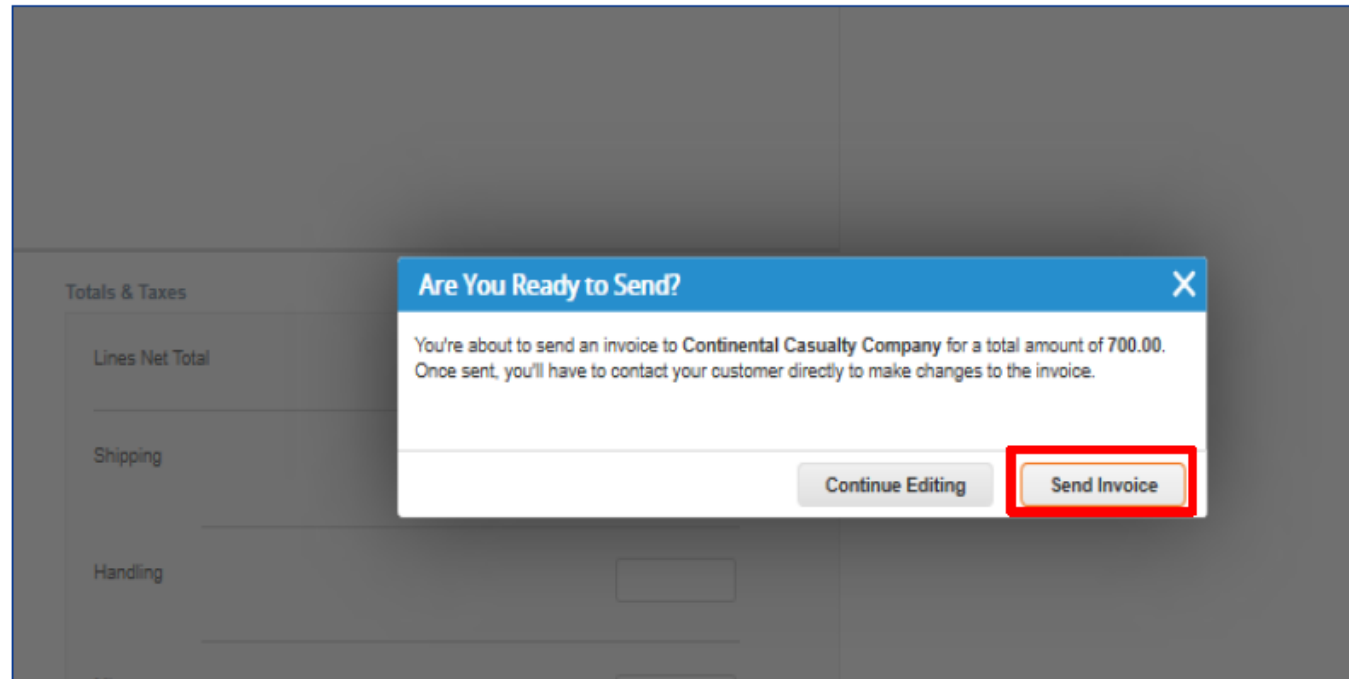
Save as Draft

Calculate

Submit










Create Invoices Via CSP

- Before submitting, a pop-up window will appear to confirm.
 - Click **Send Invoice** when you are ready to submit.
 - Any invoice changes after invoice submission must be made directly through CNA.
 - If you wish to go back to edit, click **Continue Editing**.



Create Invoices Via CSP

- After submitting, the page will refresh to display the invoice is pending approval.
 - Note: If you submitted the invoice with a new Remit-To address, the status will display as 'On Hold.'
- To check the status of the invoice, from the home page, click the invoice hyperlink in the menu bar.

Export to 		View All 					Search 
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions	
Invoice123456	06/13/19	Pending Approval	CO00000223	700.00	No		
None	06/13/19	Draft	CO00000221	700.00	No	 	
None	06/13/19	Draft	CO00000221	700.00	No	 	
Invoice12345	06/13/19	Approved	CO00000221	700.00	No		
None	06/13/19	Draft	CO00000221	700.00	No	 	

- After the invoice is approved and matched with the PO, the invoice will be paid according to CNA's standard payment terms, or to the payment terms contractually agreed upon between CNA and the supplier. Payment details will be reflected in Coupa and the CSP.

Invoice Status

- A supplier can view the following invoice statuses in the CSP:
 - **Draft** – Draft invoice that has not yet been submitted
 - **Pending Approval** – Invoice undergoing any CNA-internal process to allow final approval.
 - **Disputed** – Invoice that is currently disputed by the business or AP
 - **Approved** – Invoice that is approved and ready for payment as per the pay terms or immediately if overdue
 - **Voided** - Invoice voided after CNA fully approved and processed

Thank You

Please direct any questions to: suppliers@cna.com



Legal Disclaimer

One or more of the CNA companies provide the products and/or services described. The information is intended to present a general overview for illustrative purposes only. It is not intended to constitute a binding contract. Please remember that only the relevant insurance policy can provide the actual terms, coverages, amounts, conditions and exclusions for an insured. All products and services may not be available in all states and may be subject to change without notice. "CNA" is a registered trademark of CNA Financial Corporation. Certain CNA Financial Corporation subsidiaries use the "CNA" service mark in connection with insurance underwriting and claims activities. Copyright © 2021 CNA. All rights reserved.