

## Job Aid – Supplier: SFTP Setup and PO Backed Coupa Bulk Upload File – Coupa Tool

### SFTP Setup and PO Backed Coupa Bulk Upload File

In this job aid:

✓ **SFTP Setup and PO Backed Coupa Bulk Upload File**

This document is a step-by-step guide on how to integrate your Coupa Supplier Portal account with FTP Client to submit Invoices via SFTP. The Integration will help Suppliers to quickly transmit Invoices to DaVita.

#### **SFTP Setup and PO Backed Coupa Bulk Upload File**

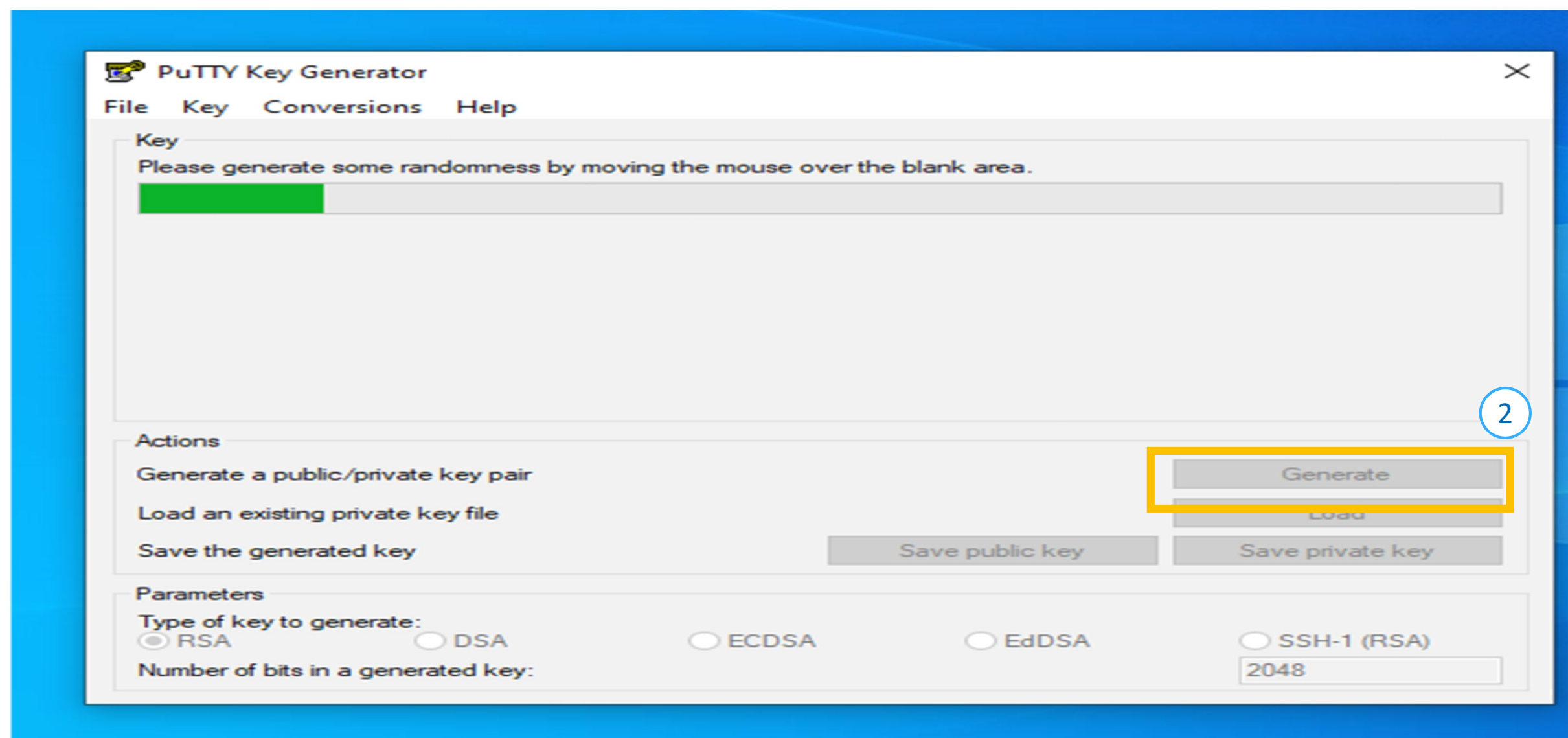
- Generate “Public Key” and “Private Key” using PuTTY Gen
- Load Public Key into Coupa Supplier Portal
- Generate Credentials for FTP Client
- Establish a Connection between your FTP Client and Coupa
- Populate the PO Backed Coupa Bulk Upload File
- Submit the PO Backed Coupa Bulk Upload File to DaVita

#### **Generate “Public Key” and “Private Key”**

1. Open PuTTY Gen , create Public and Private Keys by selecting “Generate”. Keys are generated in pairs.
2. Wiggle your mouse to make the Public and Private Keys.

**Note :** If you don’t have PuTTY Gen in your system, you can download it by navigating to

[PuTTYgen Download](#)



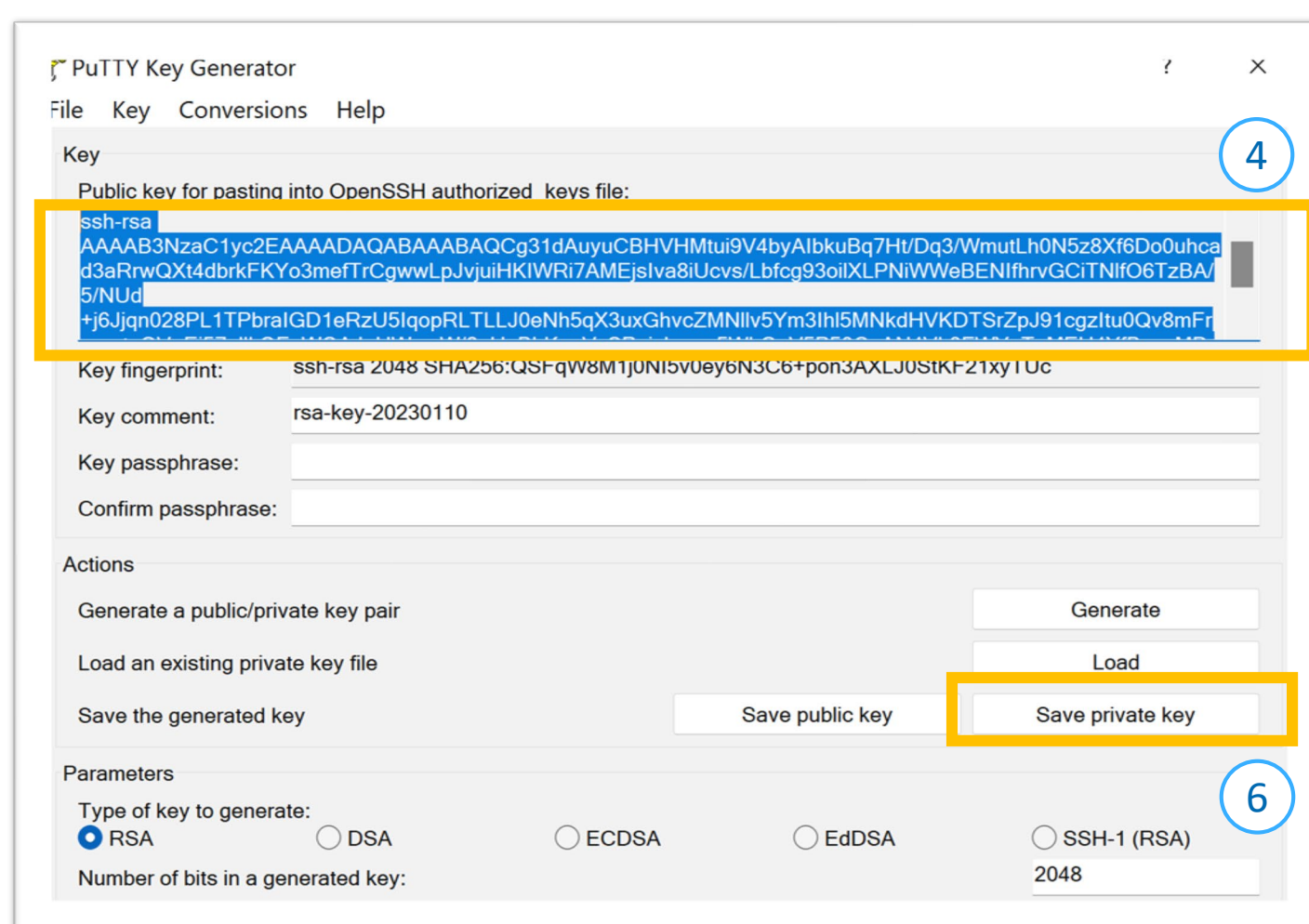
## Job Aid – Supplier: SFTP Setup and PO Backed Coupa Bulk Upload File – Coupa Tool

### SFTP Integration steps for Invoice Transmission

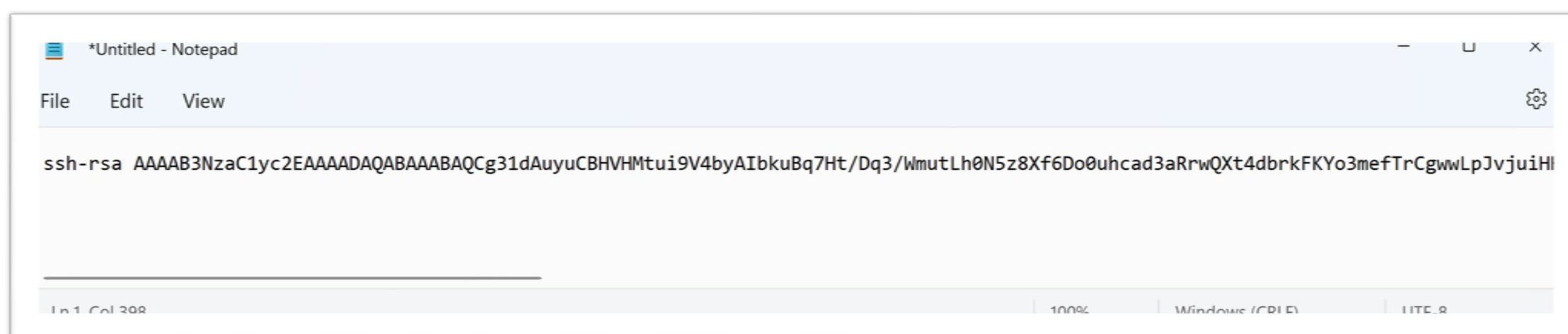
#### Generate “Public Key” and “Private Key”

- Once your Public and Private Keys have been generated, the public key will appear in the PuTTY Key Generator window.
- To save, copy the entire Public Key from the PuTTY Key Generator window.

**Note :** It is best practice to save Public Keys as \*.txt files in order to load them into Coupa. DO NOT save via the “Save public key” button as this will lead to errors.



- Open a Notepad on your desktop.
- Paste the Public Key into the empty Notepad.



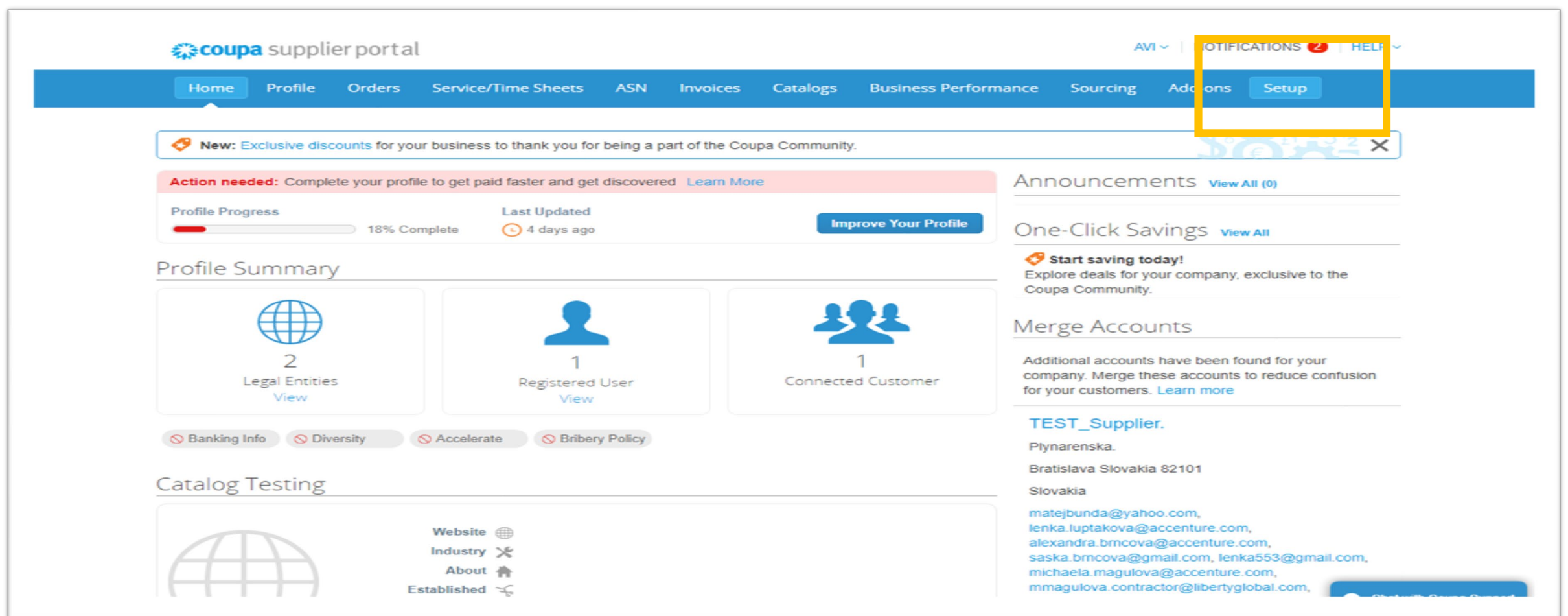
- Save the Notepad as a \*.txt file on your desktop with a descriptive name such as “DaVita Coupa Public Key”.
- Save the Private Key by selecting “Save private key” in the PuTTY Key Generator window. Place the \*.ppk file on your desktop with a descriptive name such as “DaVita Coupa Private Key”.

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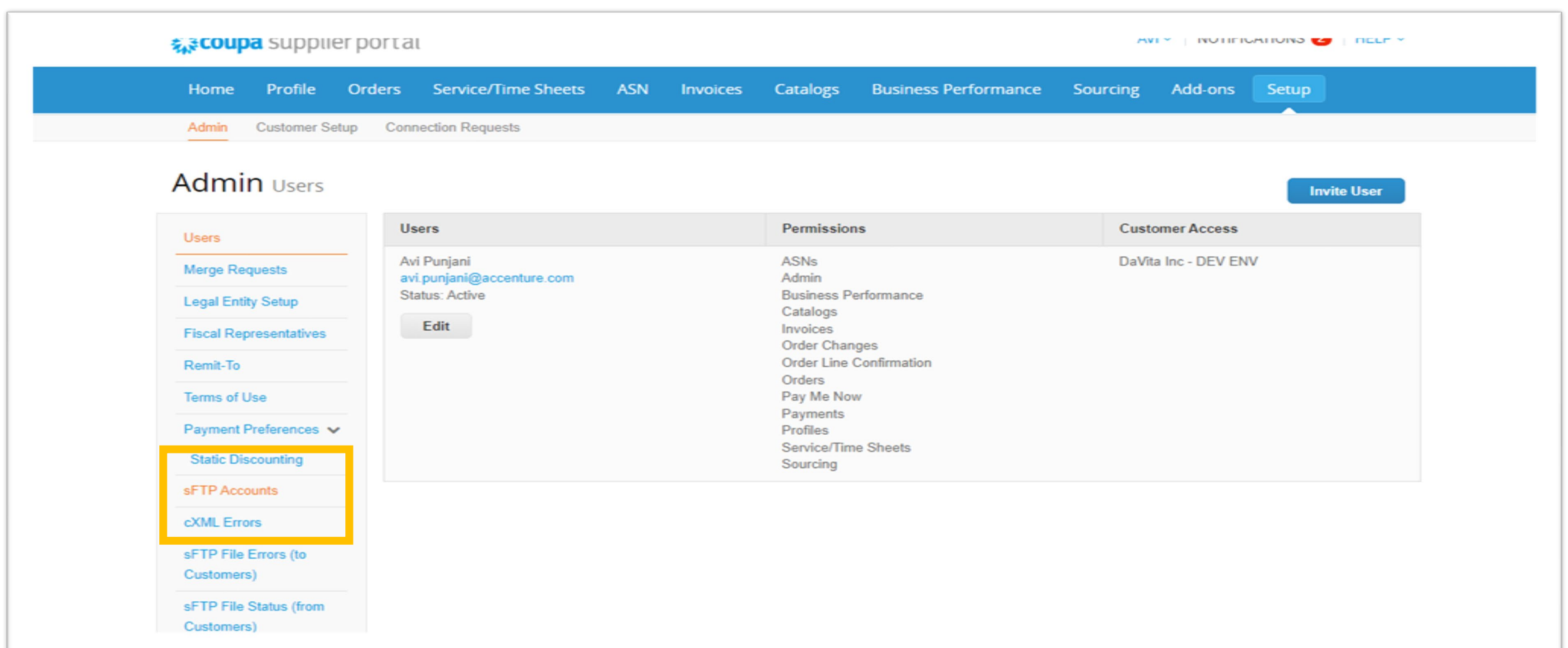
## SFTP Integration steps for Invoice Transmission

### Load Public Key into Coupa Supplier Portal

1. Open an internet browser and navigate to [Coupa Supplier Portal \(copenhost.com\)](https://copenhost.com)
2. Insert your login credentials to sign in.
3. Go to the “Setup” Tab at the top right of the Coupa Home page.



4. Select “SFTP Accounts” from the menu on the left.



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### SFTP Integration steps for Invoice Transmission

#### Load Public Key into Coupa Supplier Portal

5. Navigate to “SFTP Data to Customers”.
6. Click “Add” to insert credentials and upload your \*.txt Public Key generated by PuTTY Gen.

The screenshot shows the 'Admin' sidebar on the left with 'SFTP Accounts' selected. The main content area is titled 'SFTP Data to Customers' and includes a 'Select Customer' dropdown set to 'DaVita Inc - DEV ENV'. Below this is a table with one entry: 'catalog-testing-davita-dev' with hostname 'fileshare-us-sensitive-test.coupahost.com'. An 'Add' button is highlighted in yellow at the bottom of the page.

#### Generate Credentials for FTP Client

1. Select the pencil icon next to your SFTP account to Edit. Click “Regenerate Password” to generate login credentials for your FTP Client.

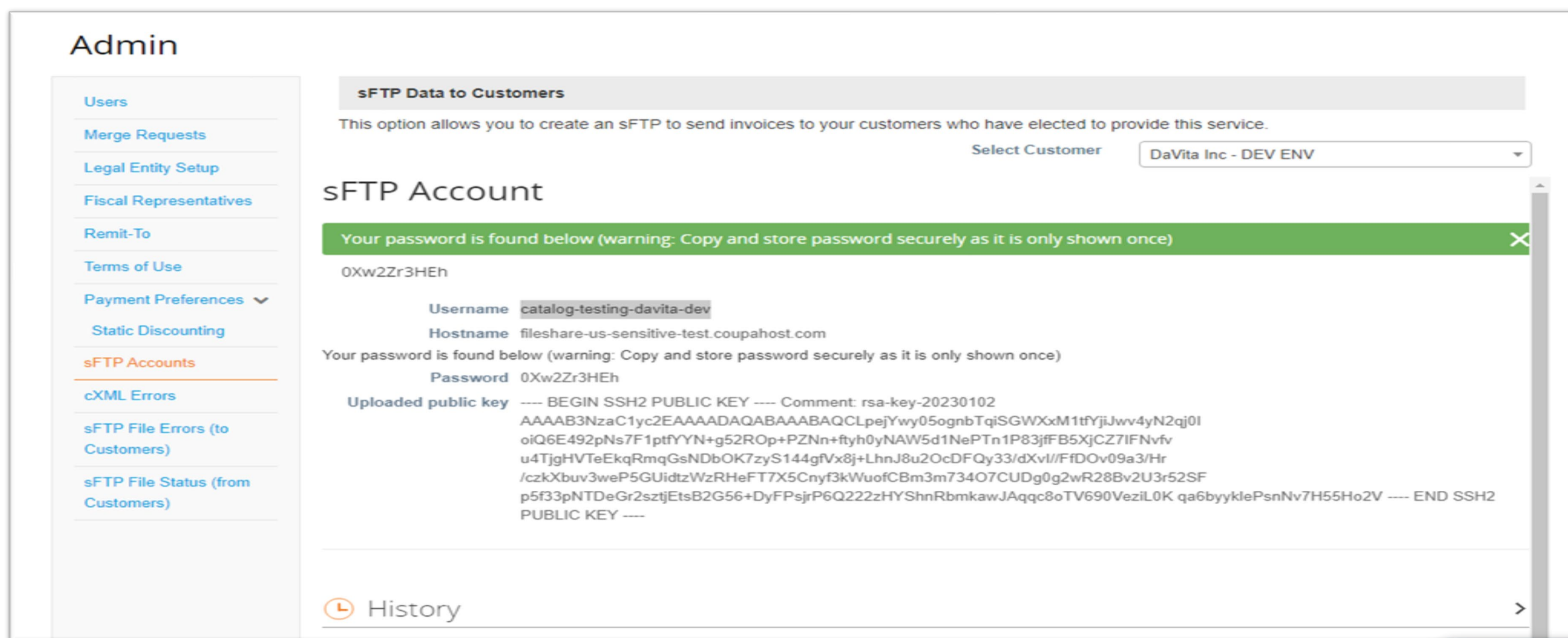
The screenshot shows the 'Edit sFTP Account' form. The 'Username' field contains 'catalog-testing-davita-dev' and the 'Hostname' field contains 'fileshare-us-sensitive-test.cou'. There is a 'Choose File' button for an 'SSH Key (optional)' and a 'Cancel' button. The 'Regenerate Password' button is highlighted in yellow.

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### SFTP Integration steps for Invoice Transmission

#### Generate Credentials for FTP Client

- Copy “Username”, “Hostname” and “Password”.

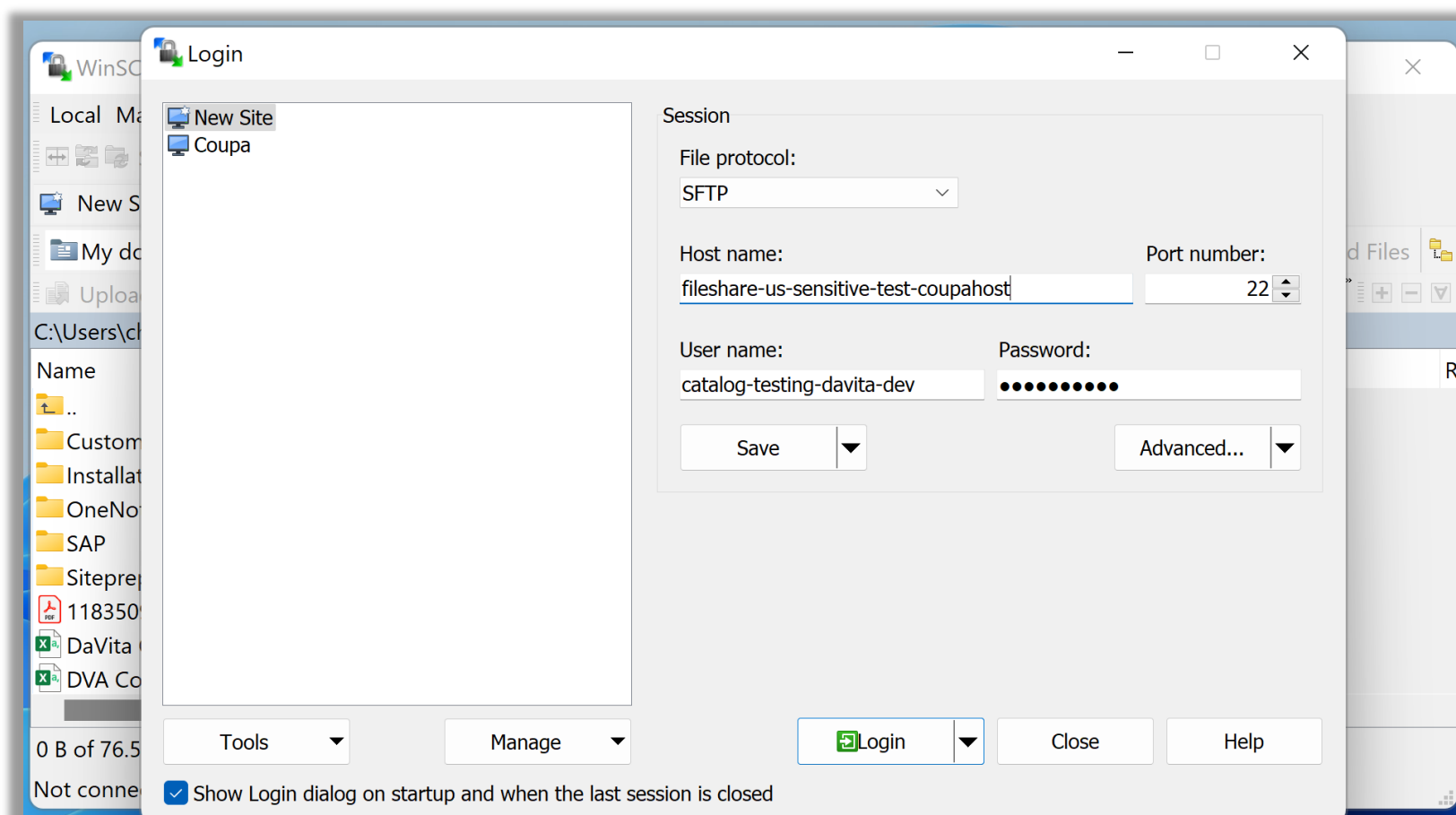


#### Establish a Connection between your FTP Client and Coupa

- Open your FTP Client and insert “Username”, “Hostname” and “Password” copied from Coupa Supplier portal. Select “Advanced”.

**Note:** If you don’t have an FTP Client, you can use WinSCP and download it by navigating to the below website

[WinSCP :: Official Site](#)

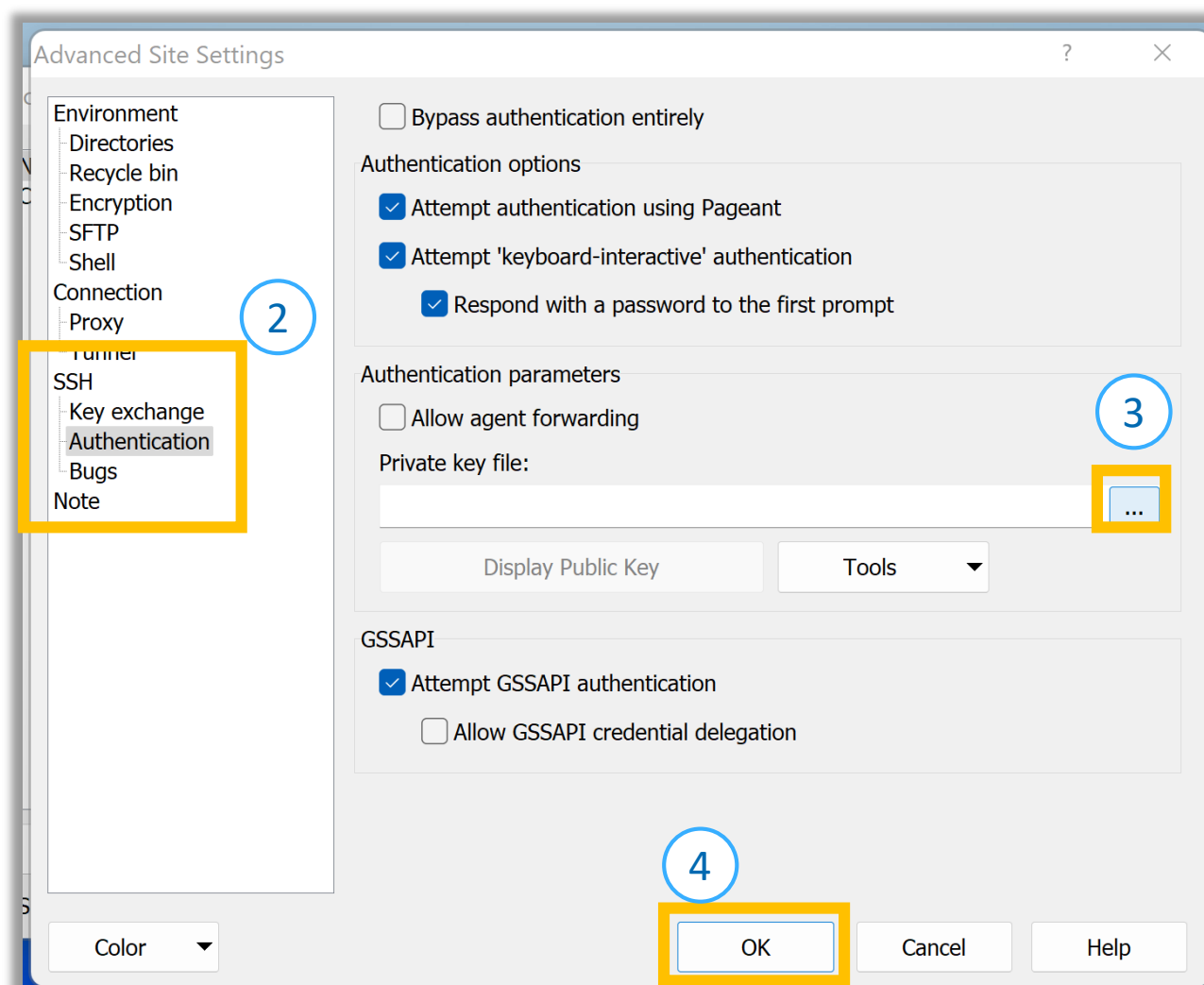


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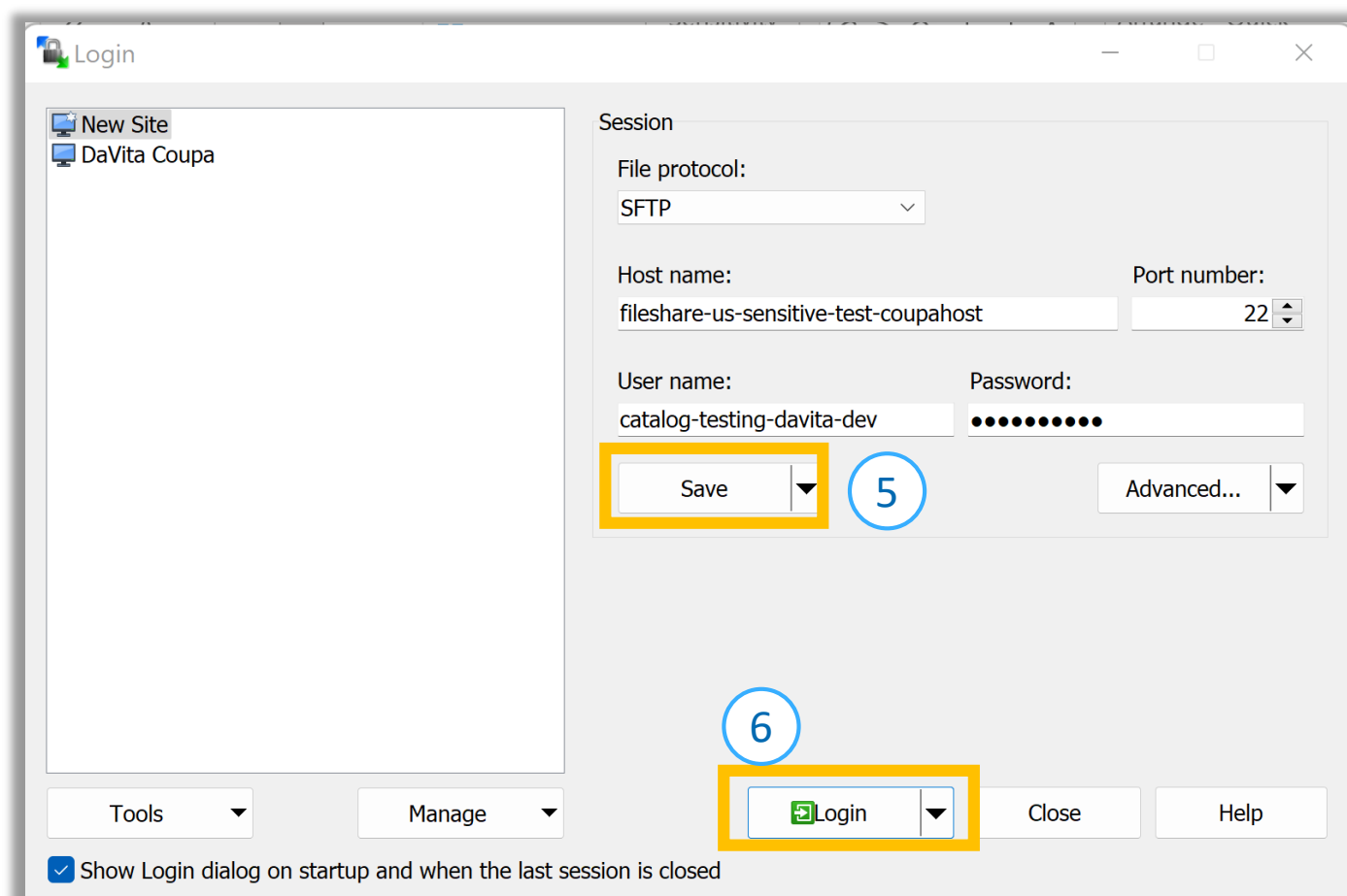
### SFTP Integration steps for Invoice Transmission

#### Establish a Connection between your FTP Client and Coupa

2. An “Advanced Site Settings” window will open. Choose authentication from the menu on the left.
3. Click on the “...” and browse to select the private key file (\*.ppk) that was saved to your desktop.
4. Select “OK”.



5. Save DaVita as a site in WinSCP, a descriptive name like “DaVita Coupa” can be assigned. Saving this site will make the login process easier in the future as you will not have to assign the private key during each session.
6. Select “Login”.

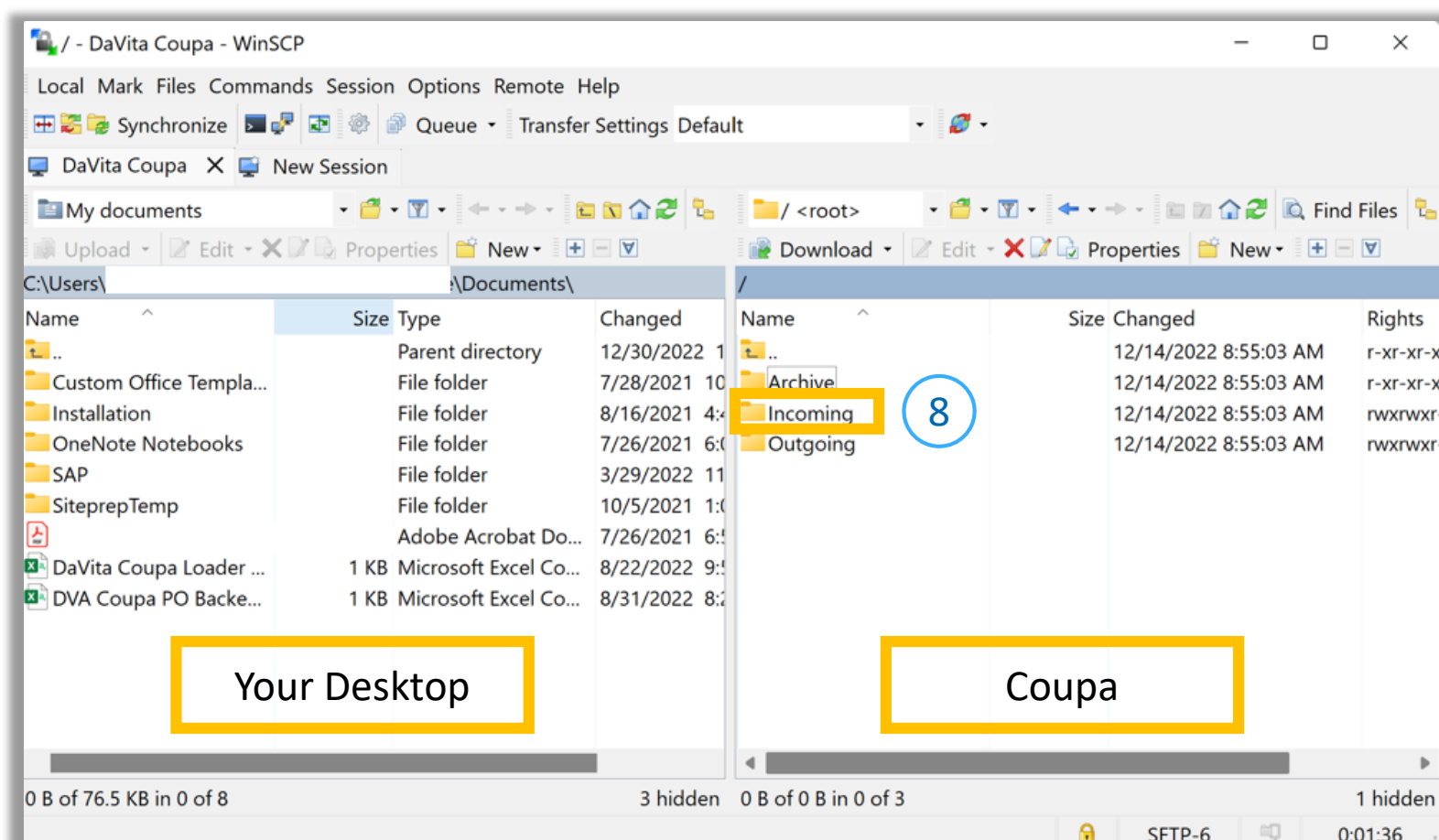


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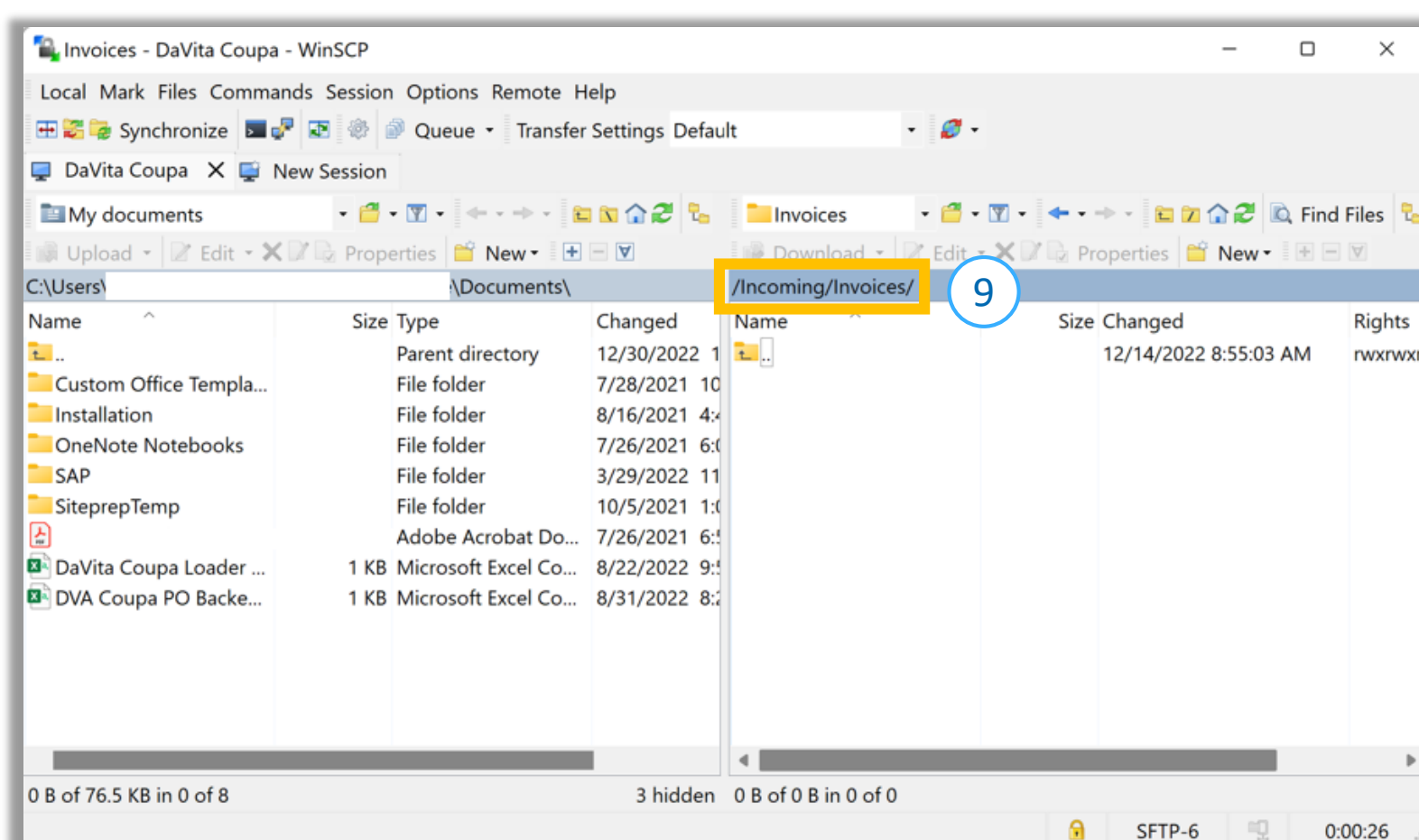
### SFTP Integration steps for Invoice Transmission

#### Establish a Connection between your FTP Client and Coupa

- You should see a window with two file browsers – the file browser on the left represents the files on your desktop, the file browser on the right represents the folder structure for Coupa. If you see the file browser on the right for Coupa, congrats you have successfully connected to Coupa from your FTP client!



- Next, we will navigate to the correct folder within the Coupa file structure. Double click on the “Incoming” folder, then double click on the “Invoices” folder.
- You are in the correct folder if “/Incoming/Invoices/” is at the top of the Coupa file browser. This is where complete PO Backed Coupa Bulk Upload files will be placed to create invoices.



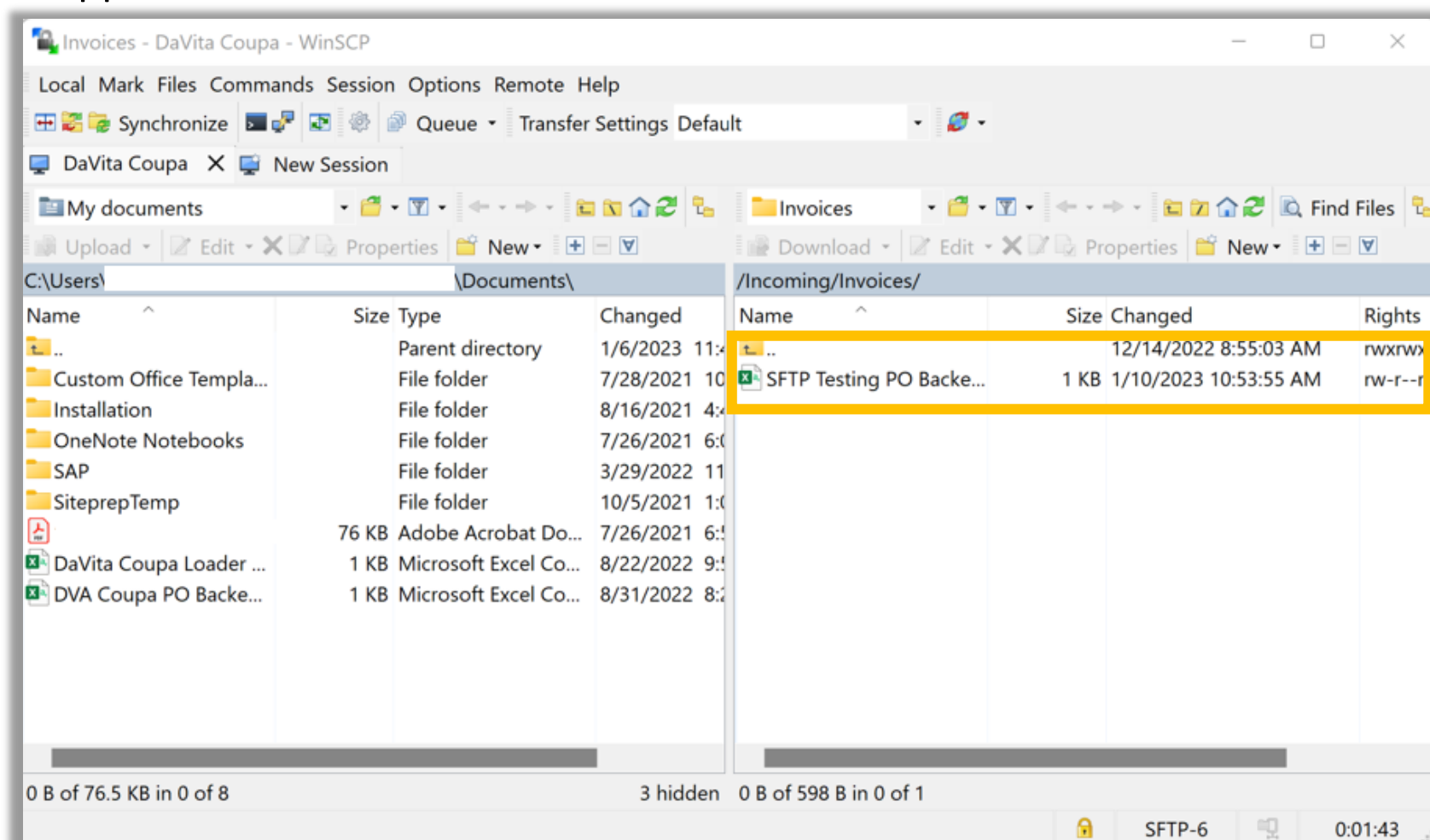
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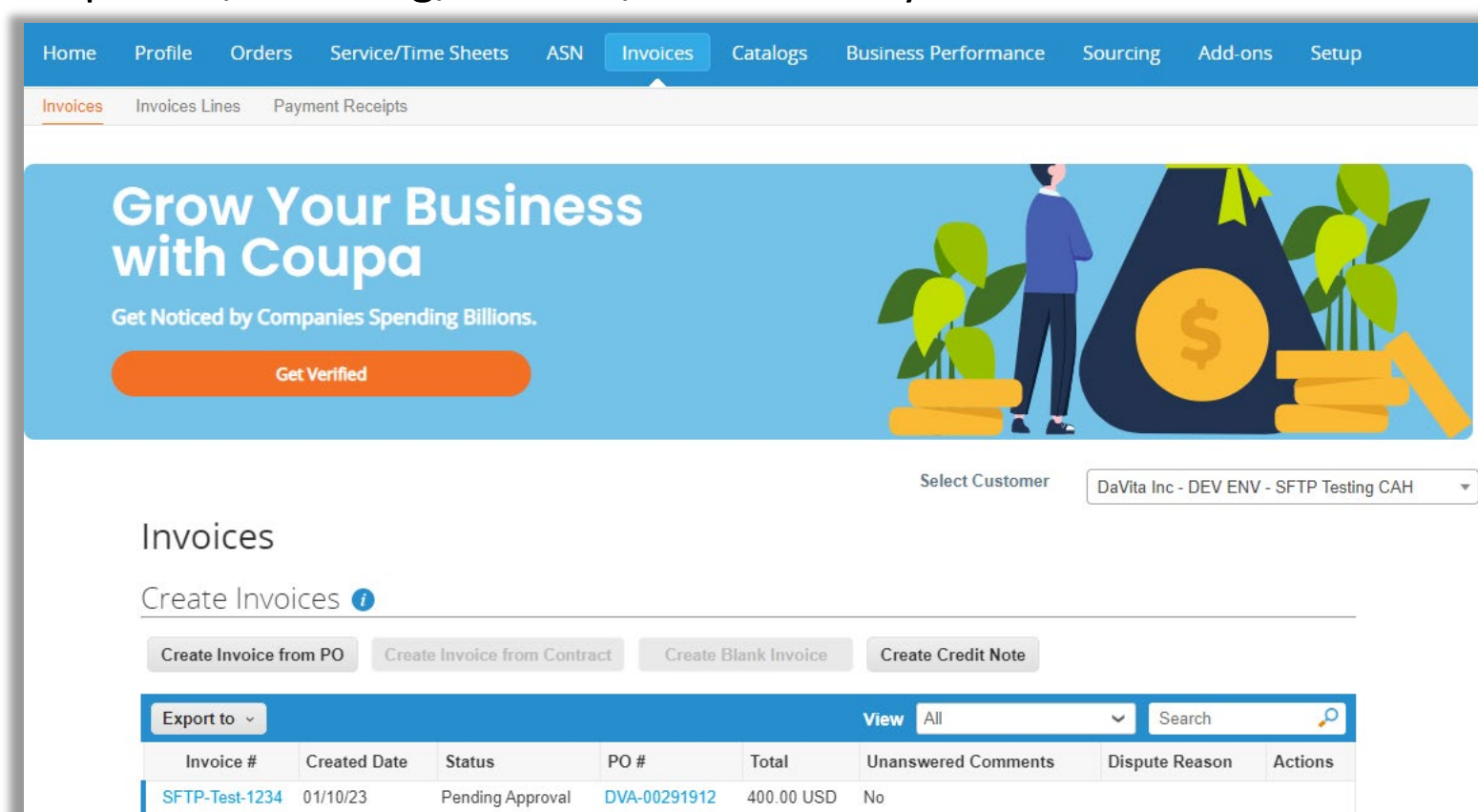
#### Create the PO Backed Coupa Bulk Upload File

#### Submit the PO Backed Coupa Bulk Upload File to DaVita

1. The file will appear in the browser.



2. Check for the invoice in CSP. SFTP loaded invoices many take a couple minutes to appear, your FTP Client will sweep the “/Incoming/Invoices/” folder every few minutes.



3. If a few minutes pass and you do not see recently SFTP loaded invoices, there may be an error with the Bulk Upload File. Follow the steps in the Troubleshooting section beginning on the next page to resolve.

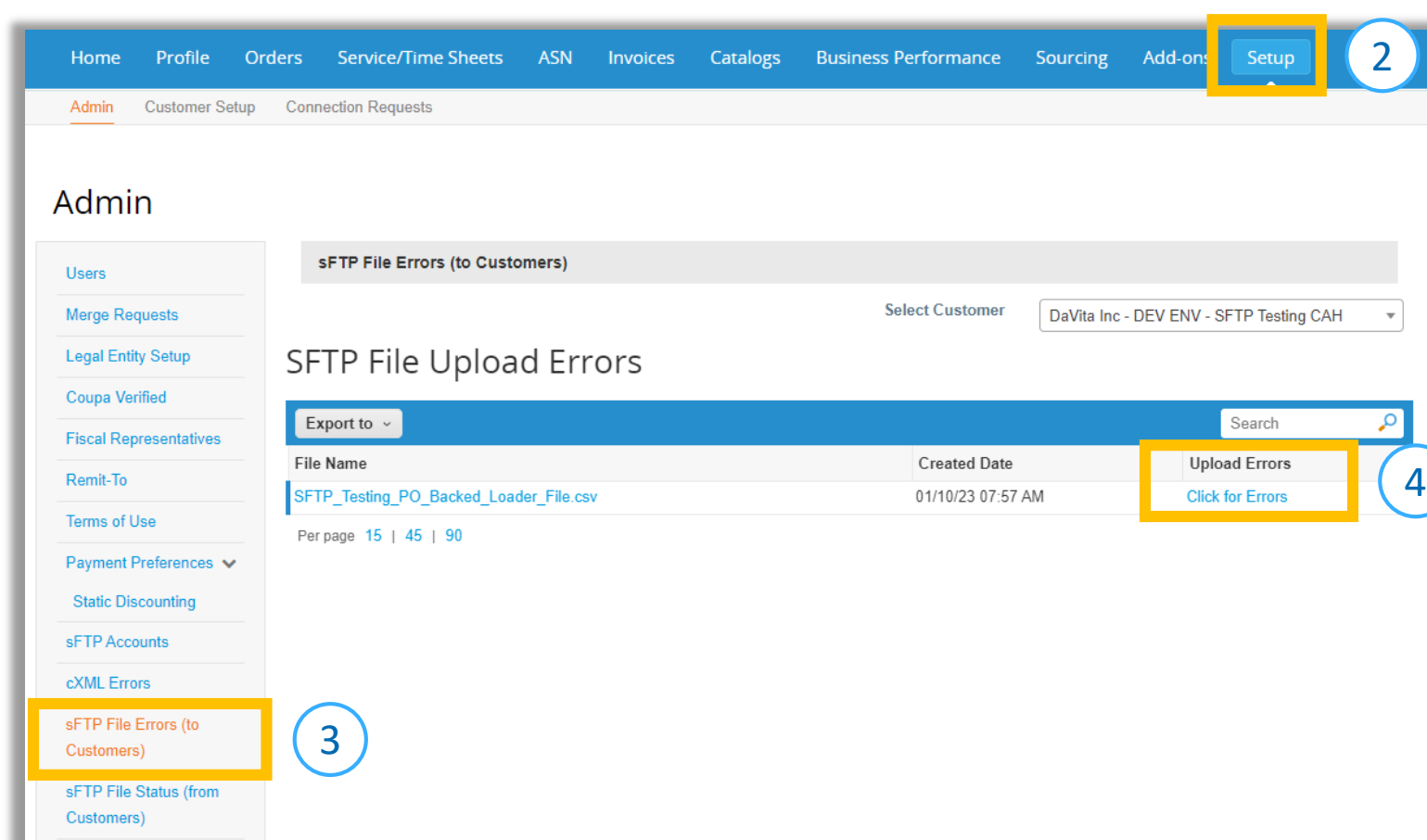


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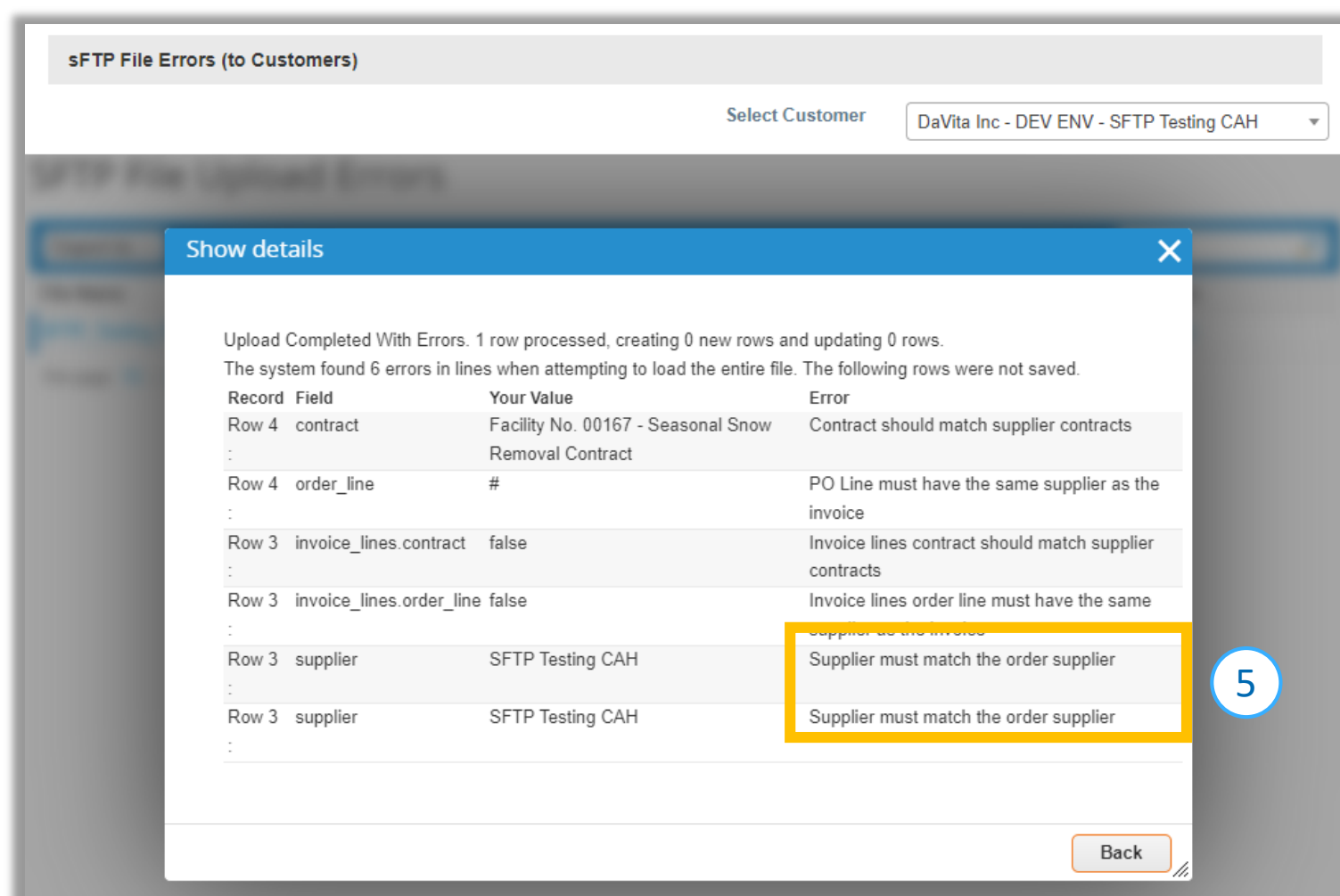
## SFTP Integration steps for Invoice Transmission

### Troubleshoot Upload Via SFTP

1. If a few minutes pass and you do not see recently SFTP loaded invoices, there may be an error with the Bulk Upload File.
2. Navigate to the “Setup” tab in the CSP.
3. Select “SFTP File Errors (to Customers)” from the menu on the left.
4. Choose “Click for Errors” to investigate your Bulk Upload File.



5. A window will open with details indicating the errors associated with the Bulk Upload File. For this example, notice that supplier indicated in the Bulk Upload File must match the supplier on the PO.



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## SFTP Integration steps for Invoice Transmission

### Troubleshoot Upload Via SFTP

- Compare POs in the CSP to content in the Bulk Upload File. In our example, notice that the PO number in the CSP does not match the PO number used in the Bulk Upload File.

**Purchase Order #** DVA-00291912

**General Info**

Status Issued - Sent via Email

Order Date 01/10/23

Revision Date 01/10/23

Requester Christian Harris

Email christian.a.harris@accenture.com

Payment Term None

Project Code None

Attachments None

Acknowledged

**Shipping**

Ship-To Address 50 Upgrade street  
50 Upgrade street2  
San Mateo, CA 11111  
United States  
Location Code: 00061  
Attn: Christian Harris

Phone 2532721916

LAN None

Terms Ground

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Invoice	Invoice Number*	Supplier Name	Supplier Number	Status	Invoice Date*	Submit for Approval	Misc Amount	Shipping Amount	Handling Amount	Line level Taxation*	Tax Amount	Tax Rate	Tax Code	Tax Rate T
2	Invoice Line	Invoice Number*	Supplier Name	Supplier Number	Line Number	Description*	Price*	Quantity	Unit of Measure*	PO Number	PO Line Number				
3	Invoice	SFTP-Test-1234	SFTP Testing CAH	SFTP-CAH		1/10/2023	Yes				No				
4	Invoice Line	SFTP-Test-1234	SFTP Testing CAH	SFTP-CAH		1 SFTP Testing		100	4 EA	DVA-00291911		1			

- Update the Bulk Upload File to resolve all errors. In this example, the PO number is corrected.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Invoice	Invoice Number*	Supplier Name	Supplier Number	Status	Invoice Date*	Submit for Approval	Misc Amount	Shipping Amount	Handling Amount	Line level Taxation*	Tax Amount
2	Invoice Line	Invoice Number*	Supplier Name	Supplier Number	Line Number	Description*	Price*	Quantity	Unit of Measure*	PO Number	PO Line Number	
3	Invoice	SFTP-Test-1234	SFTP Testing CAH	SFTP-CAH		1/10/2023	Yes				No	
4	Invoice Line	SFTP-Test-1234	SFTP Testing CAH	SFTP-CAH		1 SFTP Testing		100	4 EA	DVA-00291912		1

- Save the updated Bulk Upload File, drag and drop the file into your FTP client.
- If all errors have been resolved, the invoice(s) will appear in the CSP after a few minutes.

The screenshot shows the Coupa web interface. At the top, there's a navigation bar with 'Invoices' selected. Below it, a banner reads 'Grow Your Business with Coupa'. Underneath, there's a 'Select Customer' dropdown menu set to 'DaVita Inc - DEV ENV - SFTP Testing CAH'. The main section is titled 'Invoices' and has a 'Create Invoices' button. Below that are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. There's an 'Export to' dropdown and a 'View' dropdown set to 'All'. A search bar is also present. At the bottom, a table lists invoices with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
SFTP-Test-1234	01/10/23	Pending Approval	DVA-00291912	400.00 USD	No		