Coupa Supplier Portal (CSP) Training

Coupa

EVR

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Coupa Supplier Portal

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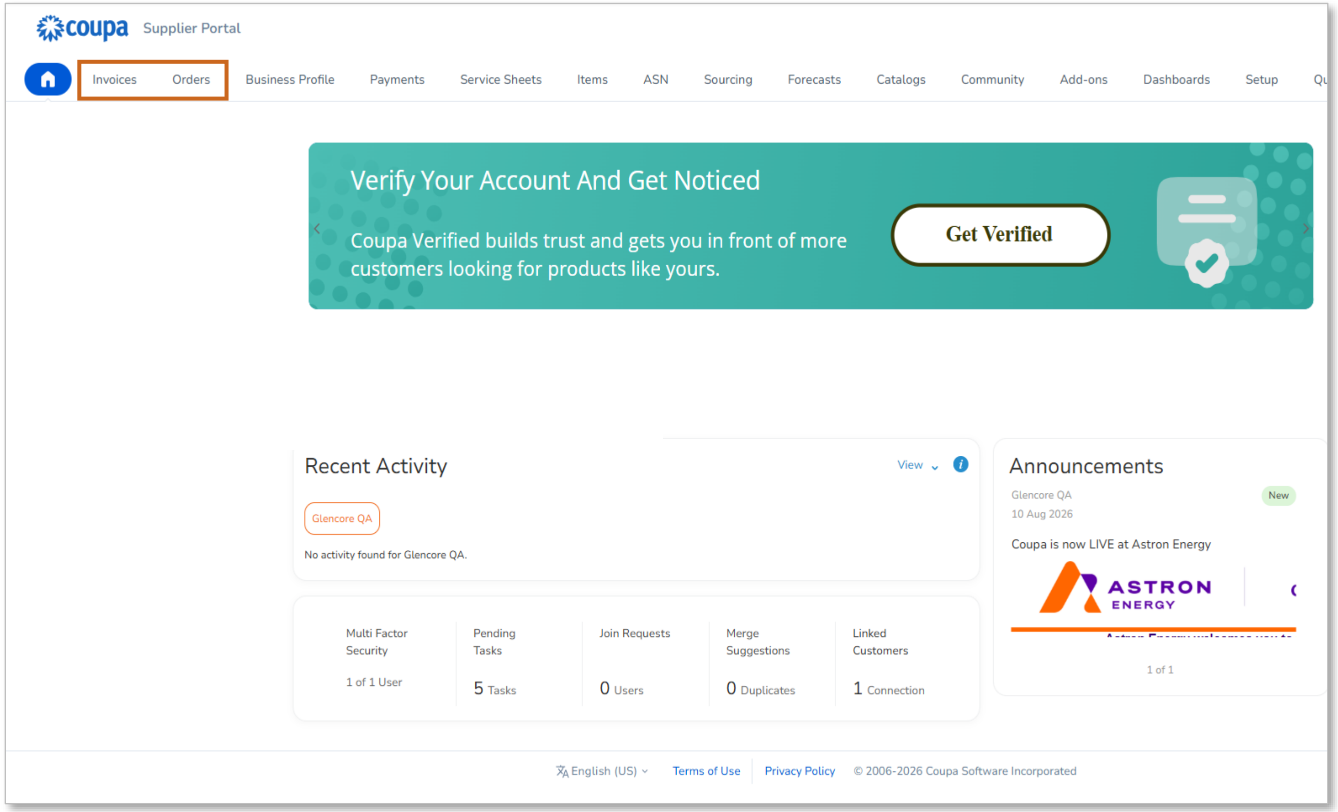
What is the Coupa Supplier Portal (CSP)?

- The Coupa Supplier Portal (CSP) is an easy-to-use online platform that allows suppliers to connect and transact digitally with EVR

- Through a single portal, suppliers can:

  - **Receive purchase orders**
  - **Submit invoices**
  - **Maintain company information**
  - **Track transaction statuses**



Key Benefits for Suppliers

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Everything in one place
Manage POs, deliveries, invoices, ASNs, and transaction statuses in one portal.

Better visibility and fewer follow-ups
Real-time status updates reduce emails and manual checks

Quicker, smoother invoicing
Invoice directly against POs to reduce errors and speed up payment

More control over your information
Keep company details, remit-to information and more up to date

Coupa provides a single, **easy-to-use online platform** where you can receive purchase orders, submit invoices, and track payment status – **all in one place.**

Coupa Supplier Portal - Functionality

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy. Depending on the customer's specific Coupa configuration, content and settings can be managed on a customer-by-customer basis.

Receive RFPs, RFQs, and submit response to EVR

Submit legal agreements & contracts

Receive and acknowledge Purchase Orders

Create and submit invoices

Check payment statuses

Onboard and communicate master data changes to EVR

Supplier Interaction Types

OBJECTIVE | Understand the procurement lifecycle and the different types of supplier interactions across the process.

Procurement Lifecycle

1. **Registering with EVR** — Suppliers can elect to register with EVR on the CSP or transact with EVR via two other transaction methods
2. **Receiving Notifications** — Dependent on the connection type, suppliers can receive notifications various ways
3. **PO Management** — POs can be managed via the CSP or SAN
4. **Invoicing** — Invoices can be submitted via the CSP or SAN.
5. **Payment Status Updated** — Payment status can be updated and viewed in the CSP or SAN
6. **Credit Notes** — Credit notes can be submitted via the CSP.
7. **Sourcing** — How to receive and respond to sourcing events

1 | COUPA SUPPLIER PORTAL (CSP)

The Coupa Supplier Portal (CSP) is a free online portal that allows suppliers to create, submit, and track invoices directly in Coupa.

WHEN TO USE:

- Use when supplier creates and registers for Coupa Supplier Portal (most recommended option)
- Use when suppliers want real-time visibility into invoice and payment status

2 | SUPPLIER ACTIONABLE NOTIFICATIONS (SAN) (EMAILS FROM COUPA ONLY)

SAN allows suppliers to submit invoices directly from email notifications sent by Coupa, without needing to log into the portal.

WHEN TO USE:

- Use when supplier prefers a simple email-based process and does not want to manage a CSP account

3 | OUTSIDE OF SYSTEM

Suppliers send PDF / email invoices to the designated AP processing team or invoice inbox.

WHEN TO USE:

- Use when suppliers are unable to transact through Coupa electronically (least recommended option)
- Use for one-time vendors not enabled for CSP or SAN

Registering for the Coupa Supplier Portal (CSP)

Learning Outcomes

- Learn how to register and log into the Coupa Supplier Portal
- Learn how to maintain your supplier profile

Registering for the Coupa Supplier Portal (CSP)

Registering for the CSP

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OBJECTIVE | Understand how suppliers can register for the Coupa Supplier Portal.

Procurement Lifecycle

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   How to receive and respond to sourcing events

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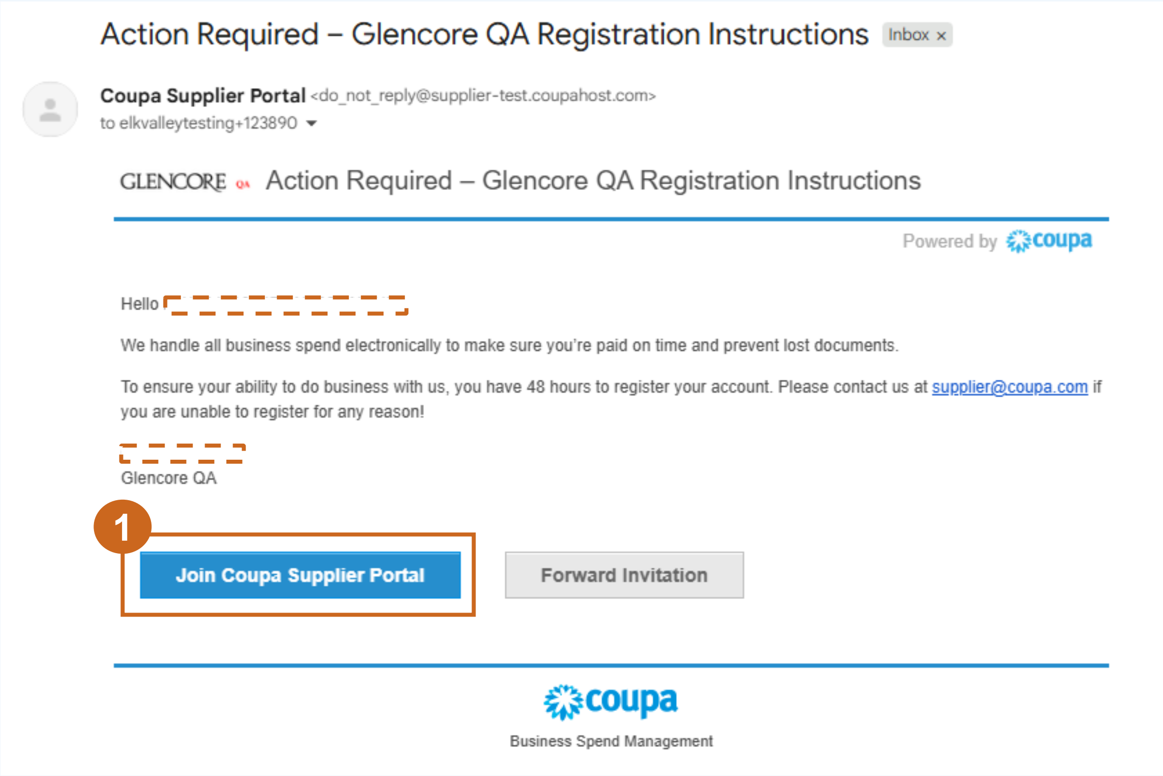
Supplier CSP Invite

OBJECTIVE | Receiving and completing the invitation to join the CSP.

1 **Join and Respond**
Select the button to continue. This will route the supplier to the CSP.



Note: Suppliers will receive an email with the link to the CSP against the Primary Email that was used to onboard the supplier.

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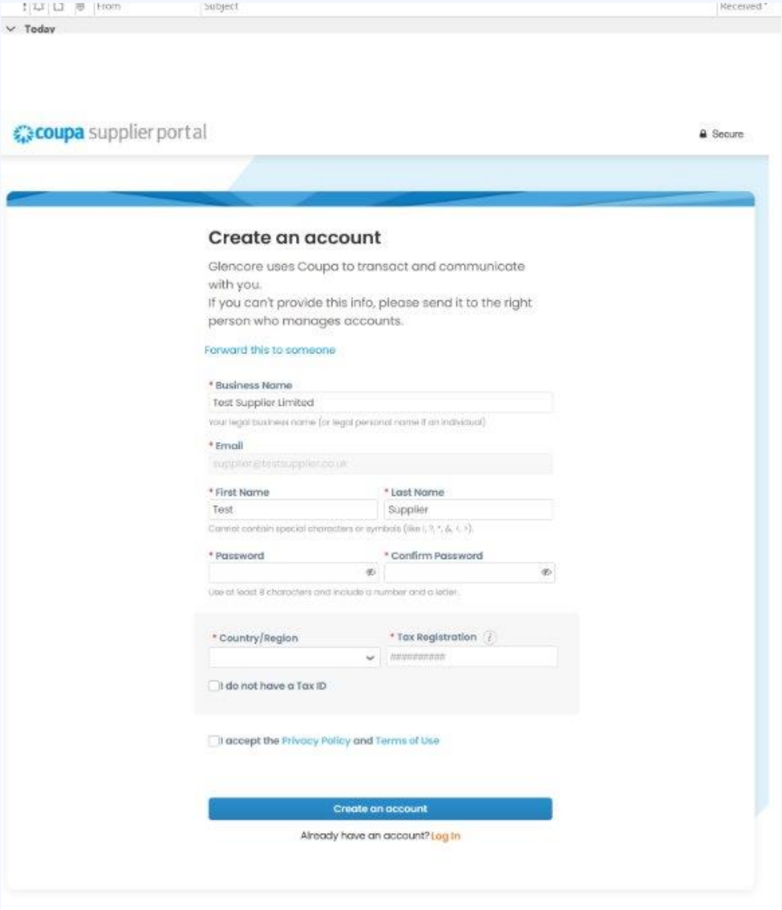
Supplier Registration

OBJECTIVE | Learn how to register and log into the supplier portal

1. **Open the CSP Registration page**
   Go to the Coupa Supplier Portal or open the customer invitation link.
2. **Create your account**
   Select Create an account and complete the registration form.
3. **Add account details**
   Enter name, company and password – required fields have red asterisks.
4. **Accept terms**
   Accept the Privacy Policy and Terms of Use, then select Create account.
5. **Choose privacy preference**
   Choose whether business information may be shared with other Coupa parties.
6. **Save and continue**
   Save the preference to complete registration and move onto onboarding.



Note: With an invitation, the registration page may include customer-specific branding and a welcome message.

Supplier Initial Set-Up

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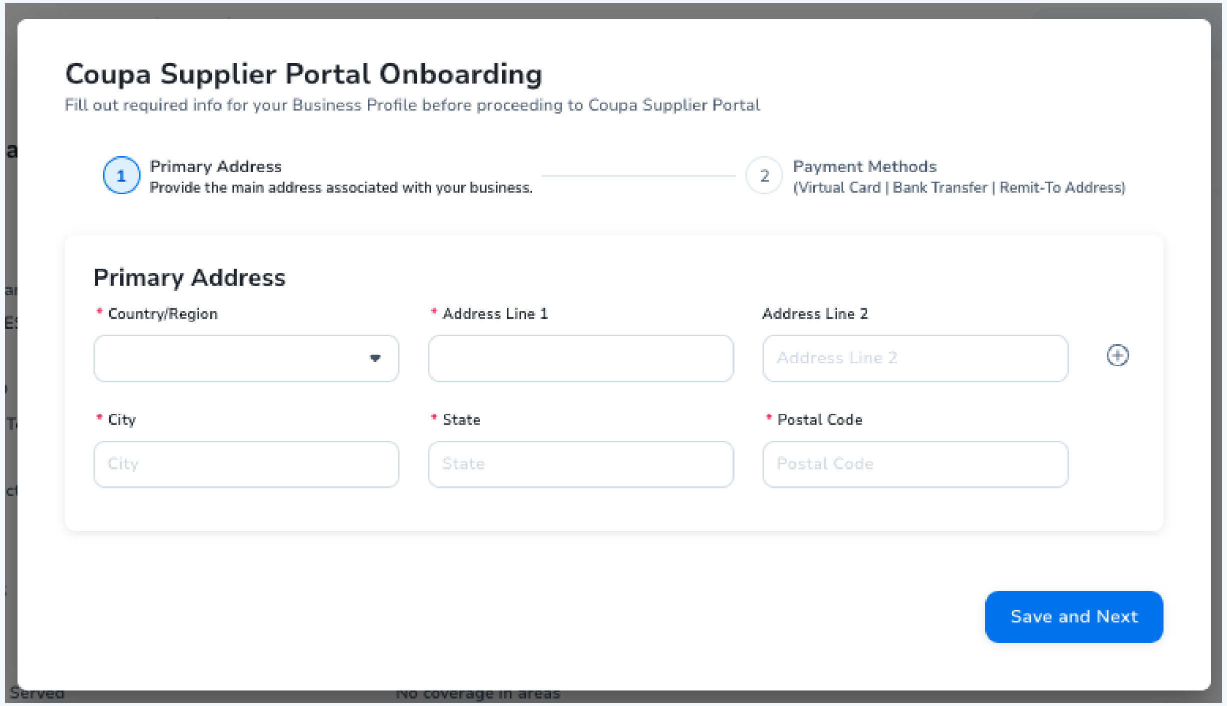
OBJECTIVE | Complete onboarding so the account is ready for supplier transactions

1. **Enter primary address**
   Provide the main business address and save the address details.
2. **Complete tax registration**
   Fill out the country-specific tax registration details required for transactions.
3. **Set payment methods**
   Create the first payment methods based on the options shown for the selected country.
4. **Virtual Card preference**
   Provide virtual card information or mark that the company does not accept it.

   Note: EVR only supports remit to addresses and doesn't currently support Virtual card payments.
5. **Bank Transfer preference**
   Enter bank transfer details or mark that the company does not accept transfers.
6. **Open Business profile**
   Select Save to finish onboarding. CSP redirects to the Business profile page, where you can update payment methods and legal entities as needed.

Note: Once you create your new account, you cannot change your country and tax registration information.



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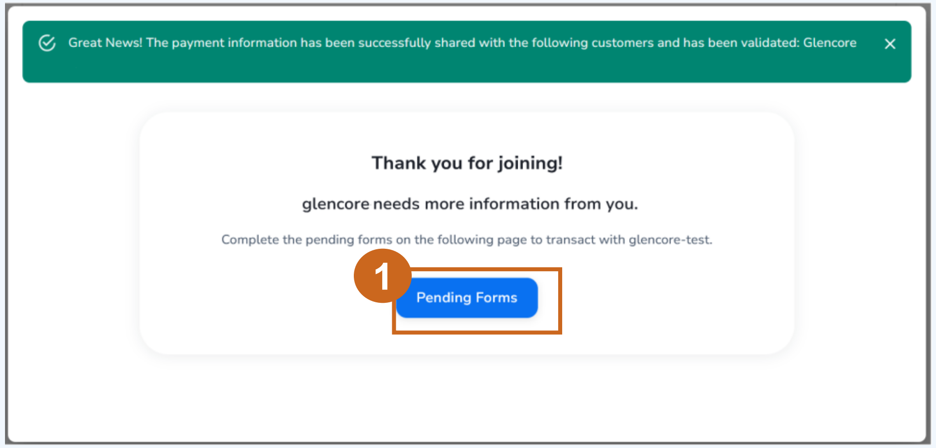
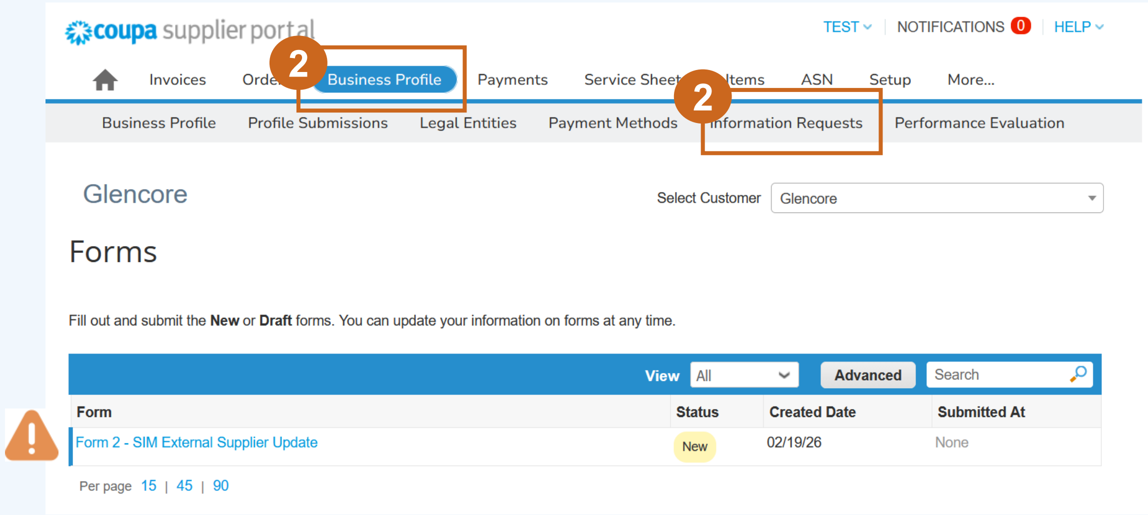
Supplier Additional Information

1 **Pending Forms**
Click on the Pending Forms button to complete the request information form EVR.

OR

2 From the CSP home page
Select Business Profile in the header ribbon, then open Information Requests in the sub ribbon.





Note: Information Requests shows a table of all forms awaiting the supplier's action, including any items in Draft, Pending Submission, or Pending Approval status. To edit the form, the Supplier will need to click on the Form Name.

Supplier Additional Information

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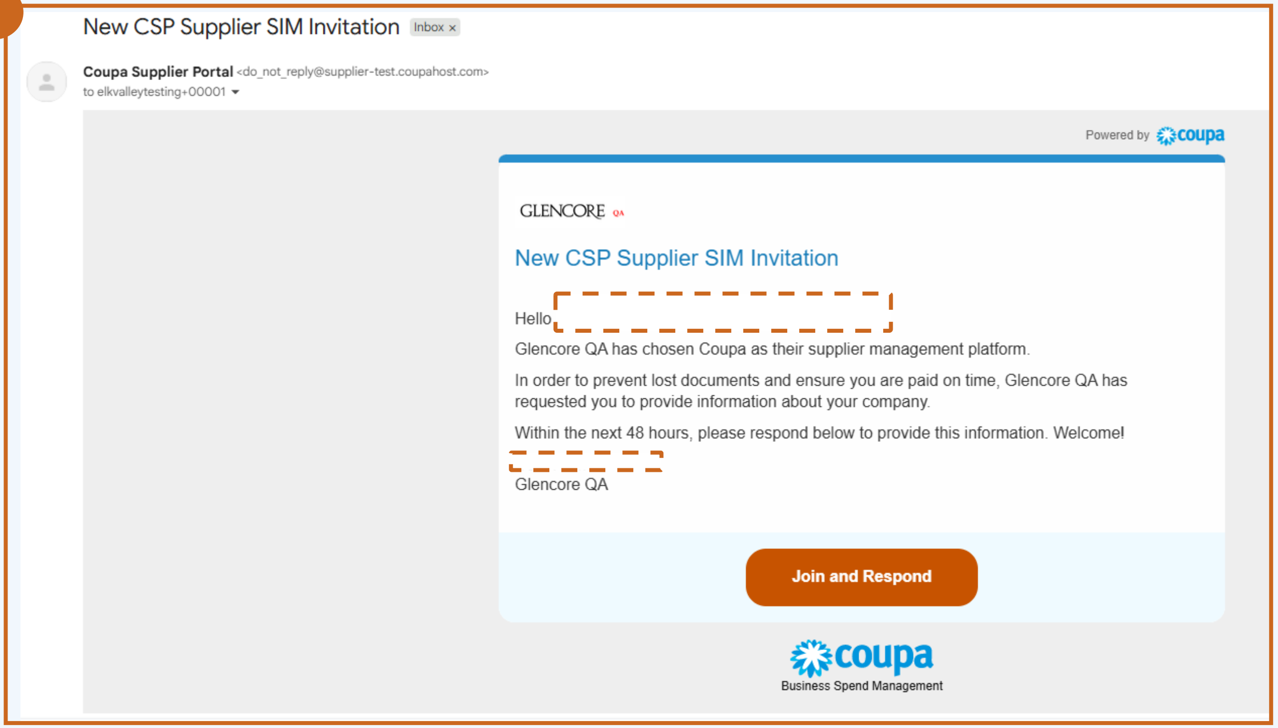
1 **SAN Suppliers can also receive SIM forms via email**
The SIM form will be sent to your supplier contact email address to fill in SIM information. In order to fill in the requested SIM form, a CSP account must be created. If you cannot create a CSP account, please reach out to EVR for alternate ways to have your supplier information entered internally into Coupa on your behalf.

1



Note :SAN Suppliers can also receive SIM forms via email

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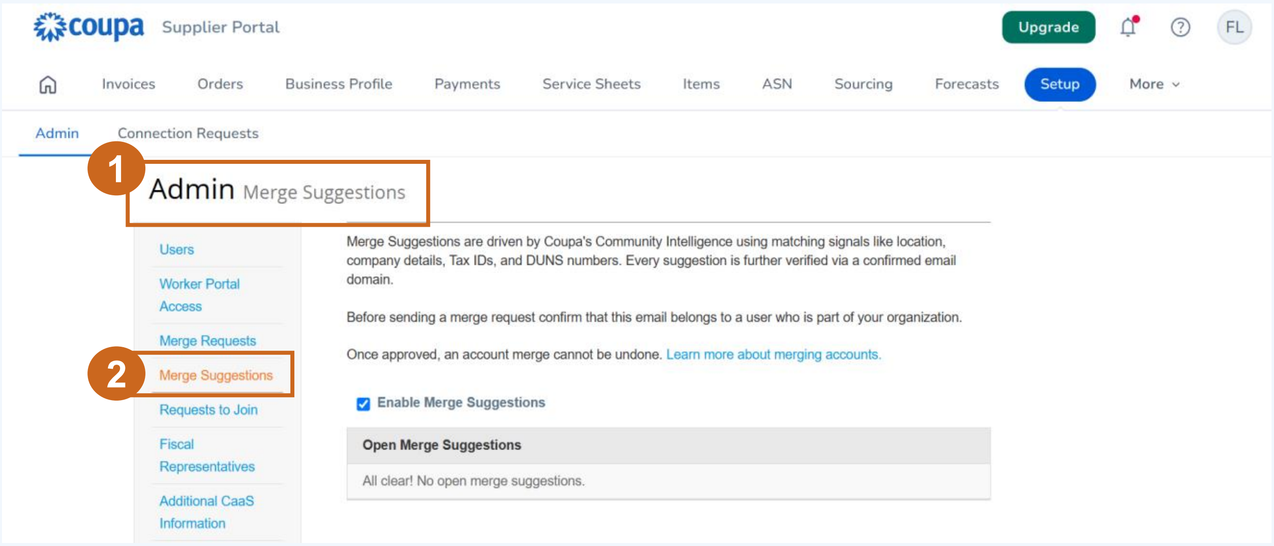
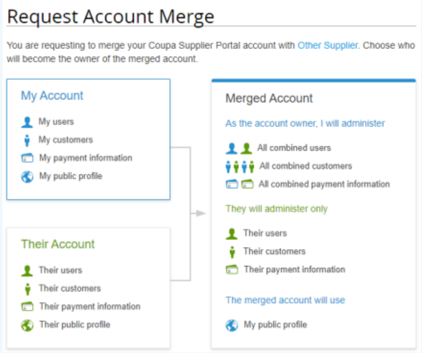
Merging CSP Accounts

OBJECTIVE | Merge CSP Accounts

1 **Merge CSP Accounts if required**
Navigate to the setup tab.

2 **Request to Merge**
CSP administrators can request to merge two accounts if necessary. The most common reasons for this, are: The need to have POs delivered to varying local supplier representatives (and a Coupa limitation of having on PO delivery endpoint per supplier). When this happens, a buyer would then have 2 suppliers within Coupa, if both supplier entities are invited to the CSP, the supplier would have 2 separate accounts.





Note: Once you merge accounts on the CSP, it cannot be undone.

Risk & Compliance (CRA)

Learning Outcomes

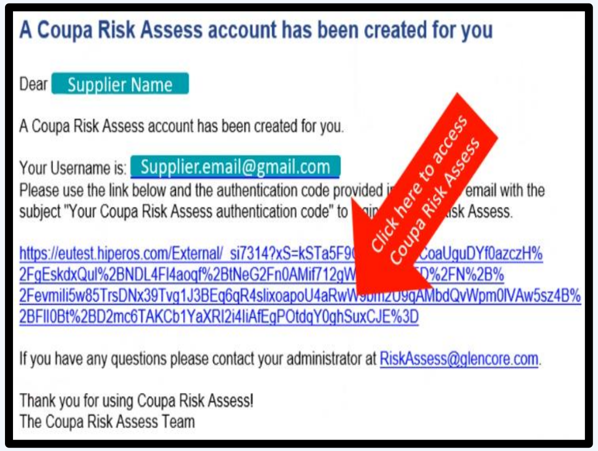
- ❑ Accessing Coupa Risk Assess
- ❑ Completion of Coupa Risk Assess Questionnaires
- ❑ KYC – Global Questionnaire

Accessing Coupa Risk Assess

Accessing Coupa Risk Assess

OBJECTIVE | Learn how to access Coupa Risk Assess, set up your account, and successfully sign in.

1. Once EVR creates a record for your company in the system, you will receive two emails from Coupa Risk Assess. Both of them need to be used to access the system.
2. The first email will contain the username and link to log into the Coupa Risk Assess platform.
3. The second email will contain the authentication code (password).
4. Once clicking on the links provided via email you will be directed to the login page.
   You will be asked to enter your authentication code that was provided in the second email you received.
5. Click on Continue.



A Coupa Risk Assess account has been created for you

Dear Supplier Name

A Coupa Risk Assess account has been created for you.

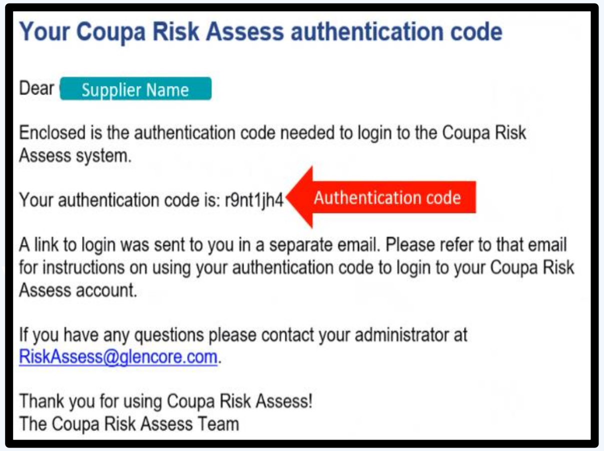
Your Username is: Supplier.email@gmail.com

Please use the link below and the authentication code provided in … email with the subject "Your Coupa Risk Assess authentication code" to … Risk Assess.

https://eutest.hiperos.com/External/_si7314?xS=kSTa5F9…CoaUguDYf0azczH%2FgEskdxQul%2BNDL4Fl4aoqf%2BtNeG2Fn0AMif712gW…D%2FN%2B%2Fevmili5w85TrsDNx39Tvg1J3BEg6qR4slixoapoU4aRwW…AMbdQvWpm0lVAw5sz4B%2BFlI0Bt%2BD2mc6TAKCb1YaXRI2i4liAfEgPOtdqY0ghSuxCJE%3D

If you have any questions please contact your administrator at RiskAssess@glencore.com.

Thank you for using Coupa Risk Assess!
The Coupa Risk Assess Team



Your Coupa Risk Assess authentication code

Dear Supplier Name

Enclosed is the authentication code needed to login to the Coupa Risk Assess system.

Your authentication code is: r9nt1jh4

A link to login was sent to you in a separate email. Please refer to that email for instructions on using your authentication code to login to your Coupa Risk Assess account.

If you have any questions please contact your administrator at RiskAssess@glencore.com.

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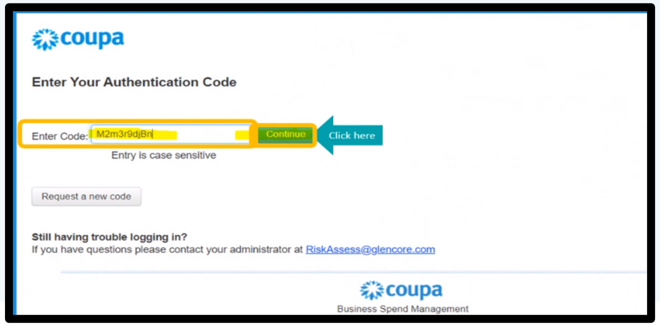

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Accessing Coupa Risk Assess

OBJECTIVE | Learn how to access Coupa Risk Assess, set up your account, and successfully sign in.

6 The next step is creating your security question. Choose one of the available questions and type in the response.

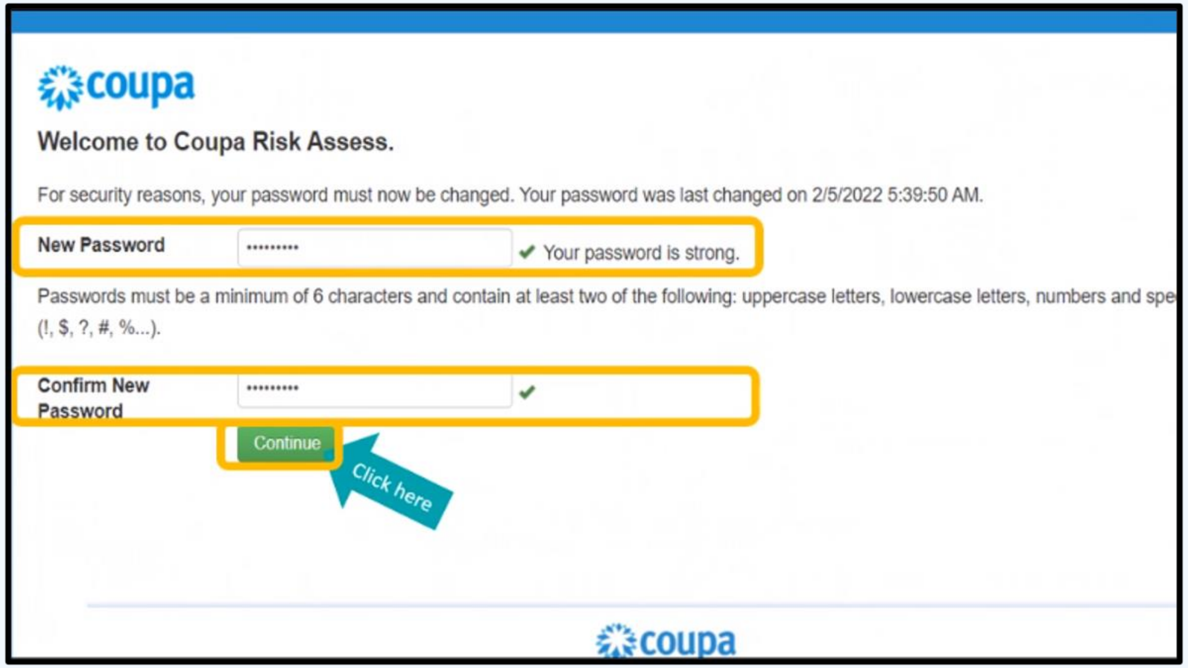
7 Once done click on “Continue”.

8 Next you will be prompted to change your password. Enter your new password.

9 Confirm your new password.

10 Click on “Continue”.

Note: Password must be a minimum of 6 characters and contain at least two of the following: uppercase letters, lowercase letters, numbers and special characters.



Accessing Coupa Risk Assess

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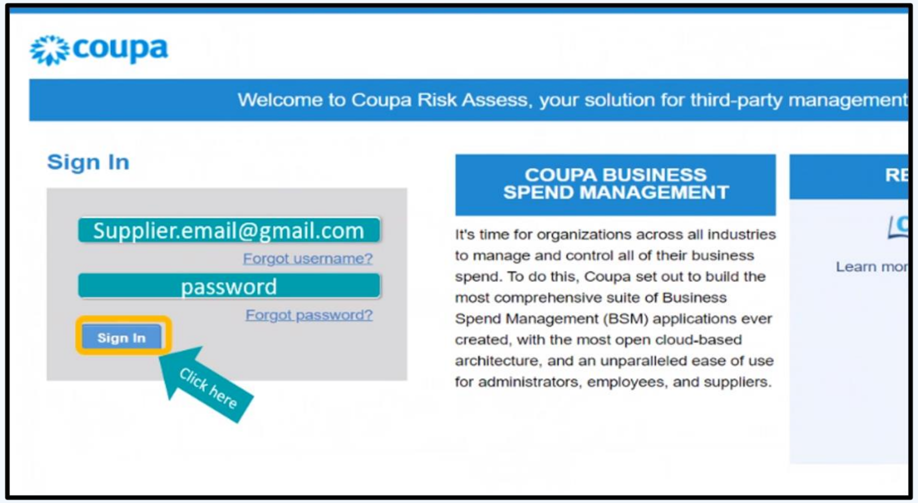
OBJECTIVE | Learn how to access Coupa Risk Assess, set up your account, and successfully sign in.

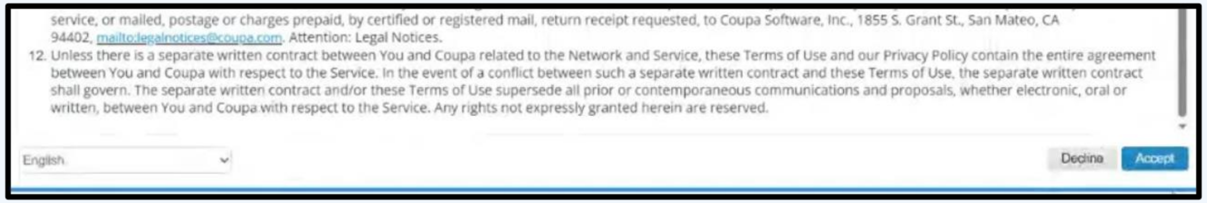
11 Now you can sign in using your username which you received in the email.

12 Enter your newly set up password from the previous step.

13 Click on the “Sign In” button to sign in.

14 After signing in you will need to accept the Terms of Use in order to access the portal. Click “Accept” to do so.



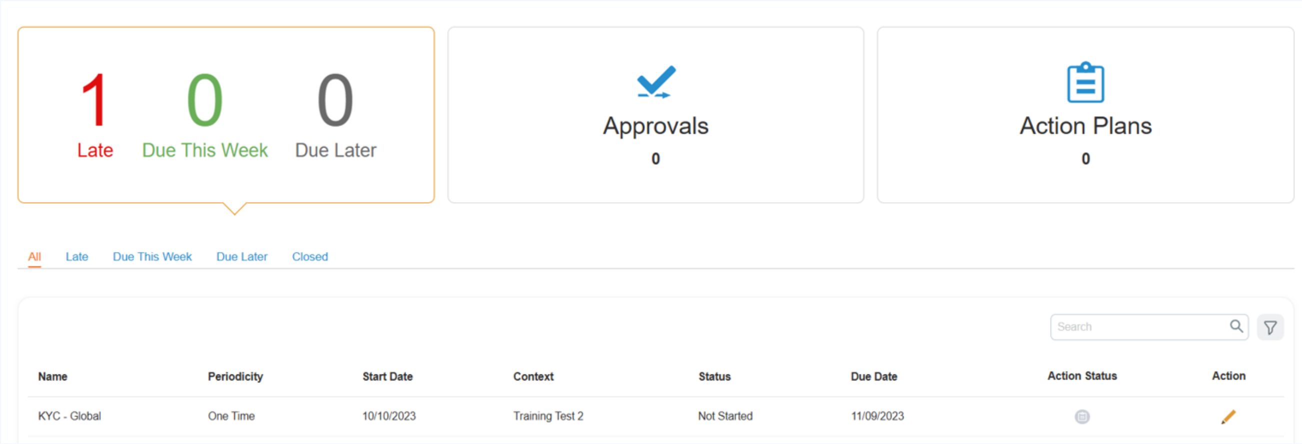


Completion of Coupa Risk Assess Questionnaires

Completion of Coupa Risk Assess Questionnaires

OBJECTIVE | Learn how to find and begin completing your assigned Coupa Risk Assess questionnaires.

1. Once you log in, you will see your home page. This is also the Dashboard that can be used to monitor the progress of your questionnaires. You will notice that you may have two new evaluations to complete. In this example, we only have 1 evaluation.
2. Select “All” under Evaluations
3. This will show you all your evaluations that need to be completed. You may have a KYC – Global and/or an External Goods and Services Questionnaire to complete.
4. Click on the “Pencil icon” button to start completing the questionnaire(s).



Navigating the CSP

Learning Outcomes

- Learn how to navigate and use the portal

Navigating the Coupa Supplier Portal

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Navigation of the Portal – Home Tab

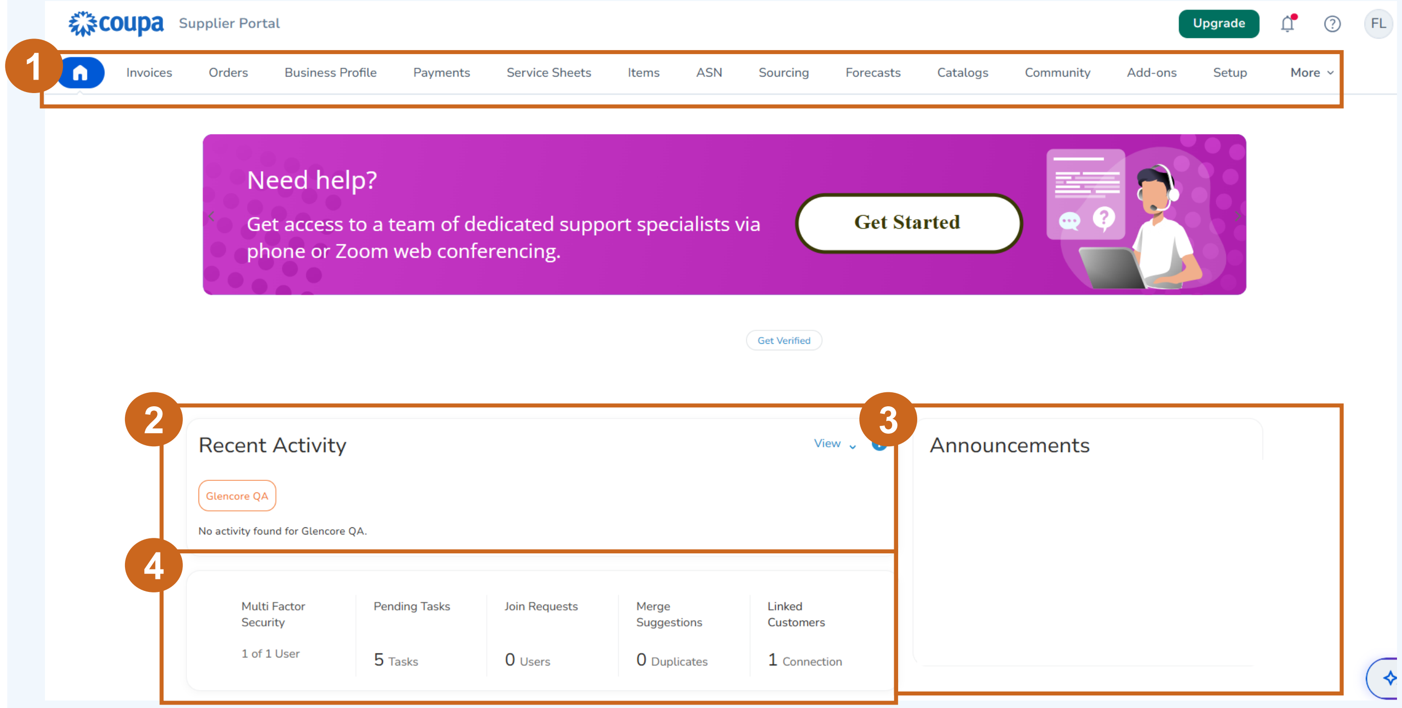
OBJECTIVE | Learn how to navigate the supplier portal and functionalities available

1 **Menu bar options**
At the top you will find the menu bar and options available within the portal.

2 **Recent Activity**
This will list all your most recent activity. There are filtering options to view recent activity by transaction type/system event

3 **Announcements**
Any EVR related announcements will be shared here.

4 **CSP Statistics**
Here you can see information on your pending tasks, join requests and more



User Admin and Updating Notifications

Learning Outcomes

- User administration and notifications

User Administrator and Notification Settings

Managing Notification Preferences

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OBJECTIVE | Understand how CSP Suppliers can update and receive notifications.

Procurement Lifecycle

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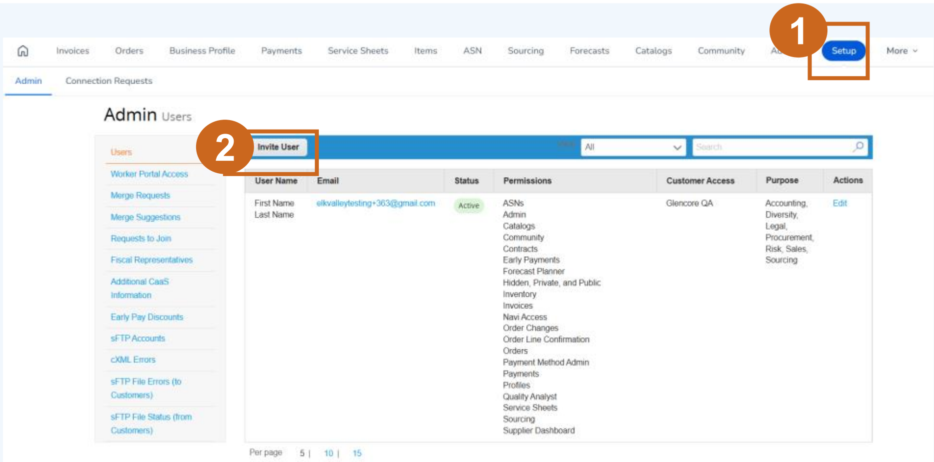
Administrator Tab and Notification Setting

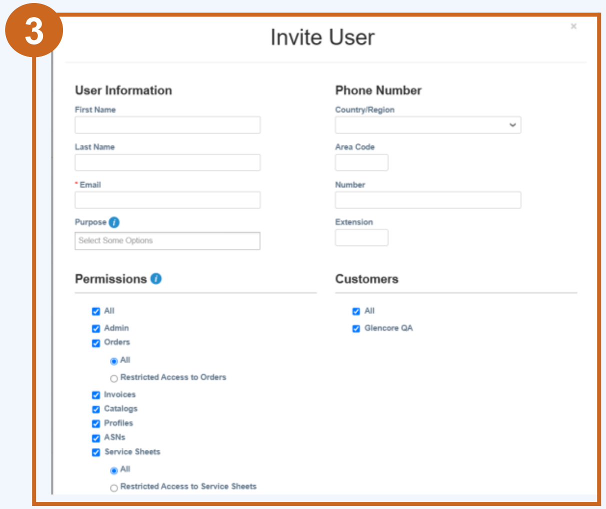
OBJECTIVE | Learn how to manage the account profile and add new users to the supplier portal.

1 Click Setup tab
Click Setup to go to the administrator tab on the right side of the portal.

2 Invite Users
Click on ***Invite User*** and fill in the required data and select the permissions that will be enabled for the user you are adding.

3 Send invitation
Click on send the invitation and the user will be notified.





Note: You can forward the invitation only to email addresses with the same domain. This ensures more built in security.

Administrator Tab

OBJECTIVE | Learn how to manage the account profile and add new users to the supplier portal.

4 Admin options

View description of the administrator tab options:

a. **Merge Requests:** Merge accounts and manage merge requests.

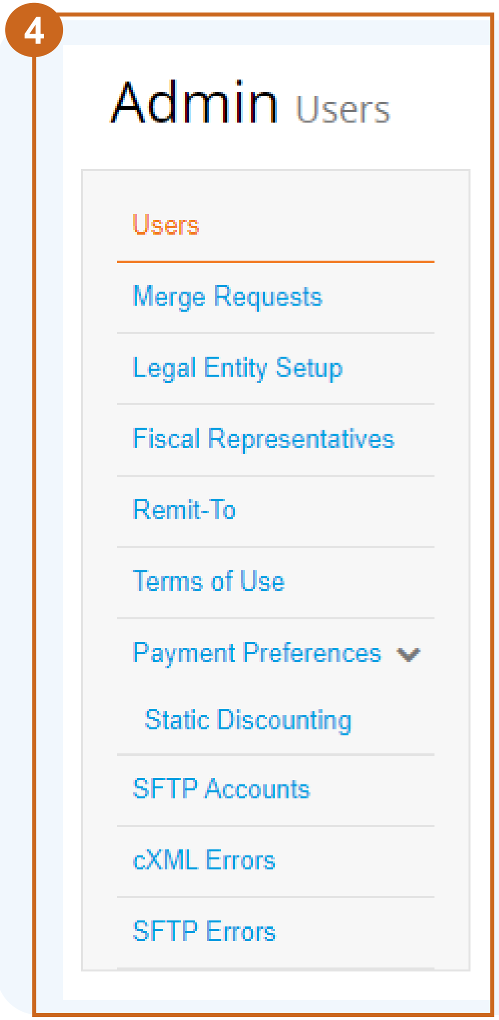
b. **Legal Entity Setup:** Setup your account to create electronic invoices by adding legal entities / shipping addresses.

c. **Fiscal Representatives:** Add tax representatives in countries where you are not registered with a local address but need to be registered for tax purposes.

d. **Remit-to:** Provide the shipping address and associated tax information to meet compliance regulations when invoicing.

e. **Terms of Use:** View and sign the terms of use for working with the Coupa portal.

f. **Payment Preferences:** Set up your prepayment discount terms and apply them to invoices and/or purchase orders to get paid faster.



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Adjust Notifications Settings

OBJECTIVE | Learn how to adjust or configure the account according to your needs.

1 Click on name
Click on your name in the upper right hand corner.

a. Select ***Account Settings*** if you want to change the password.

b. Select ***Notification Preferences*** to adjust notifications

2 Manage notifications
In the drop-down list you can manage the notifications according to your interests

a. Check the email option if you want to receive email notifications. It is recommended that you always activate this option.

b. Check the SMS option if you want notifications to be sent to your linked mobile number.