Supplier Coupa Training

Supplier

August 2019

Supplier coupa Training

1. Get Started with the CSP

- Register for the CSP
- Create Your Account
- Log in to the CSP
- Manage your Account

2. Working with the CSP

- Create an Invoice from a PO
- Create a Credit Note
- Viewing and Editing an Invoice
- Creating a Non-PO or Contract Based Invoice
- Invoice Statuses
- View and Manage POs
- Purchase Order statuses
- View PO Lines

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3. Administer the CSP

- Admin Page
- Manage Users
- Set up E-Invoicing
- View Remit-to Information

4. Sourcing Events

- How Suppliers Participate in Events
- Supplier Participating in Live Auction

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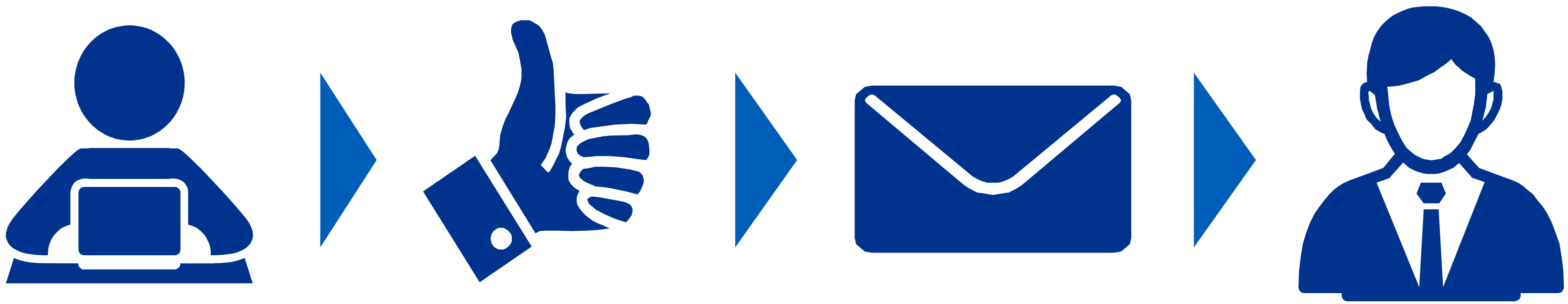
Supplier on-boarding process



Your KPMG contact will request submit an internal request to register you as a new supplier.

Once approved, you will set-up in the Procure-to-Pay (P2P) system (Coupa).

You will then get an email, inviting you to log into Coupa and complete the registration process through the Coupa Supplier Portal (CSP).

Once you have registered onto CSP, you are ready to go.

You are ready to do business

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Benefits of the Procure-to-Pay (P2P) system

Fast and Easy

Registering and setting up to do business becomes easy

Payments

Payments are faster and on time

Communication

Keeping suppliers informed at all times

Transparency

Visibility on all your invoice and orders

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Get started with the CSP

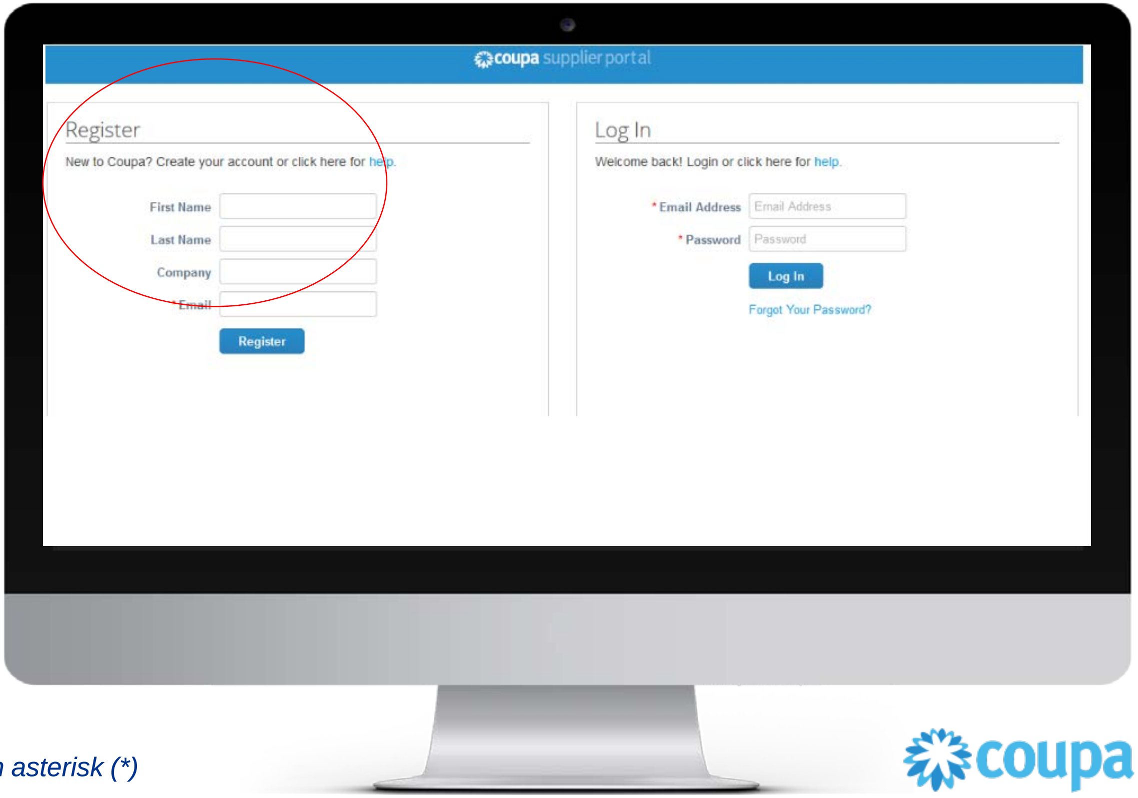
Customer-created invitation

1. If your client has the correct email address, they will send you an invitation to your email to register on the Coupa Supplier Portal

Get started with the CSP

Self-created invitation

1. Go to Supplier.coupahost.com and in the **Register** pane on the left, fill in the fields. Mandatory field are marked with an asterisk
2. Once done, you will receive an email with a link to validate your information and create your account



Required fields are marked with an asterisk (*)

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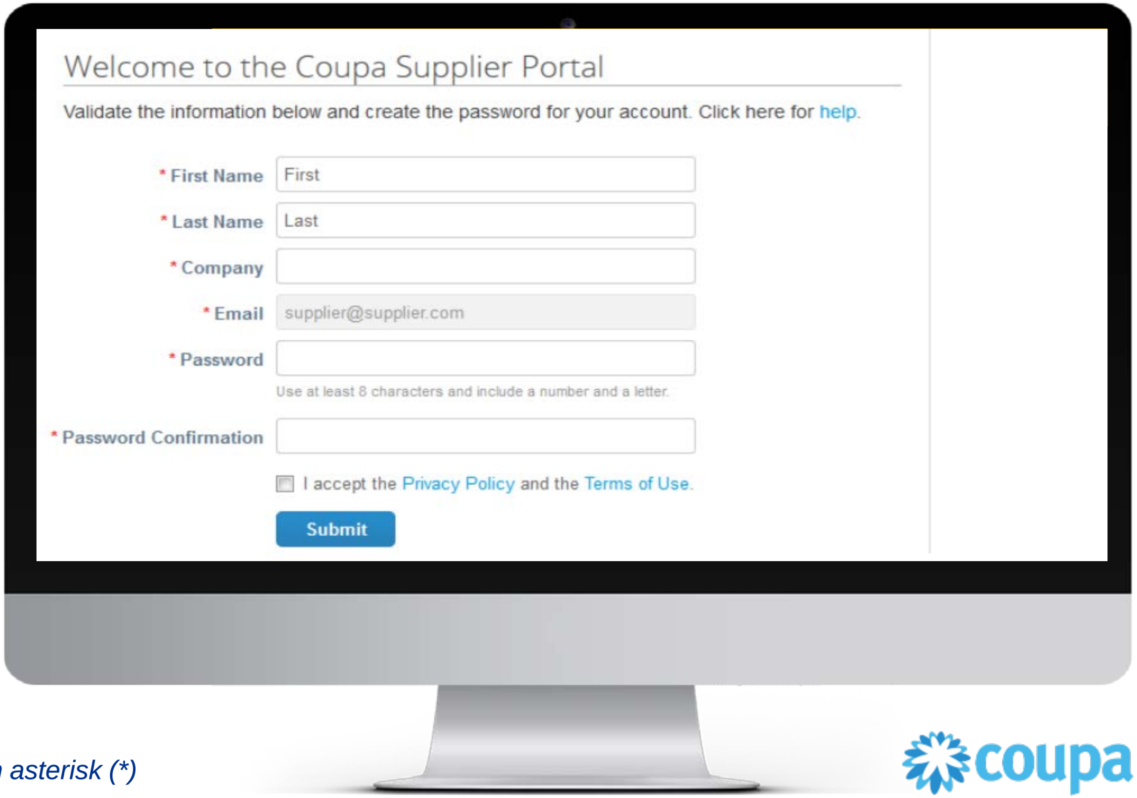
Get started with the CSP

Create your account

1. Once registered, you'll receive a link in your email to confirm and direct you to a page to fill out the rest of the mandatory fields
2. Here's where you input your basic information for your account and your company's public profile



Required fields are marked with an asterisk (*)

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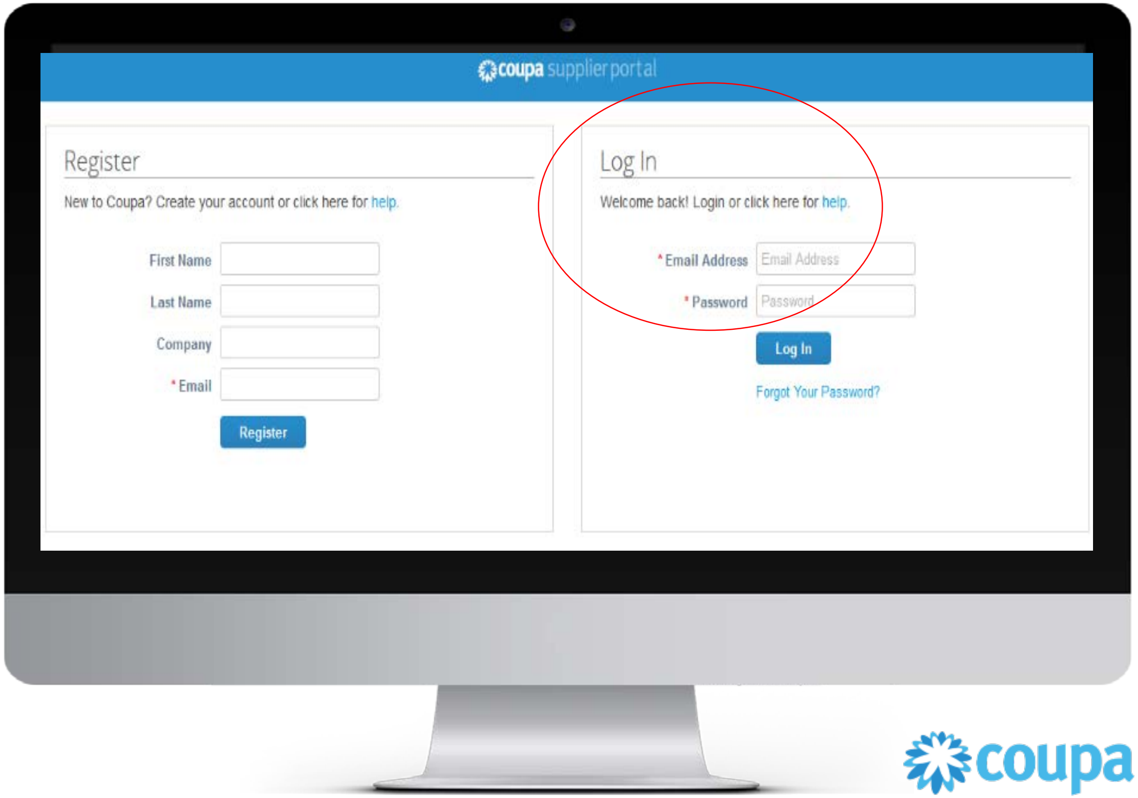
Get started with the CSP

Log in to the CSP

1. Go to supplier.coupahost.com and **Log in** pane on the right, enter your email address and password and click **Log In.**
2. You should be able to now log in after registering



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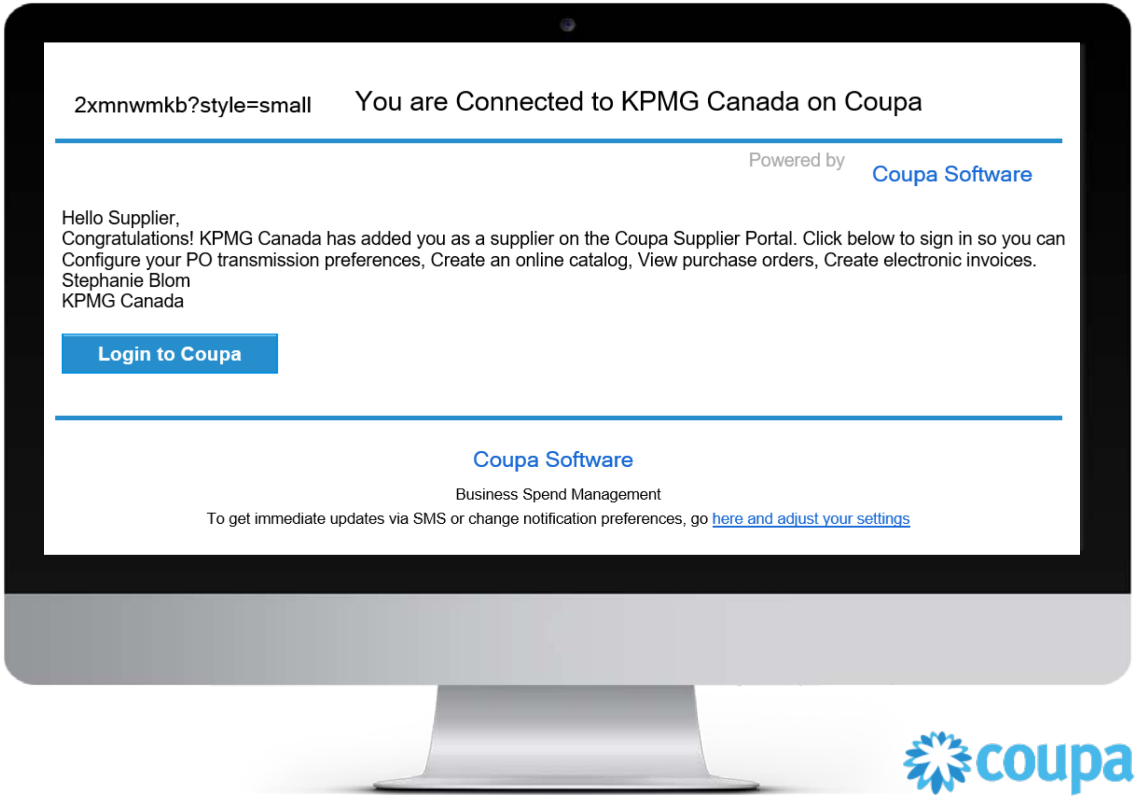
Get started with the CSP

Log in to the CSP – Existing Supplier

1. If you already have an account set up on the CSP you will receive an email saying that you are connected to KPMG Canada on Coupa.
2. Click on 'Login to Coupa' and follow your regular login process of inputting your email and password.



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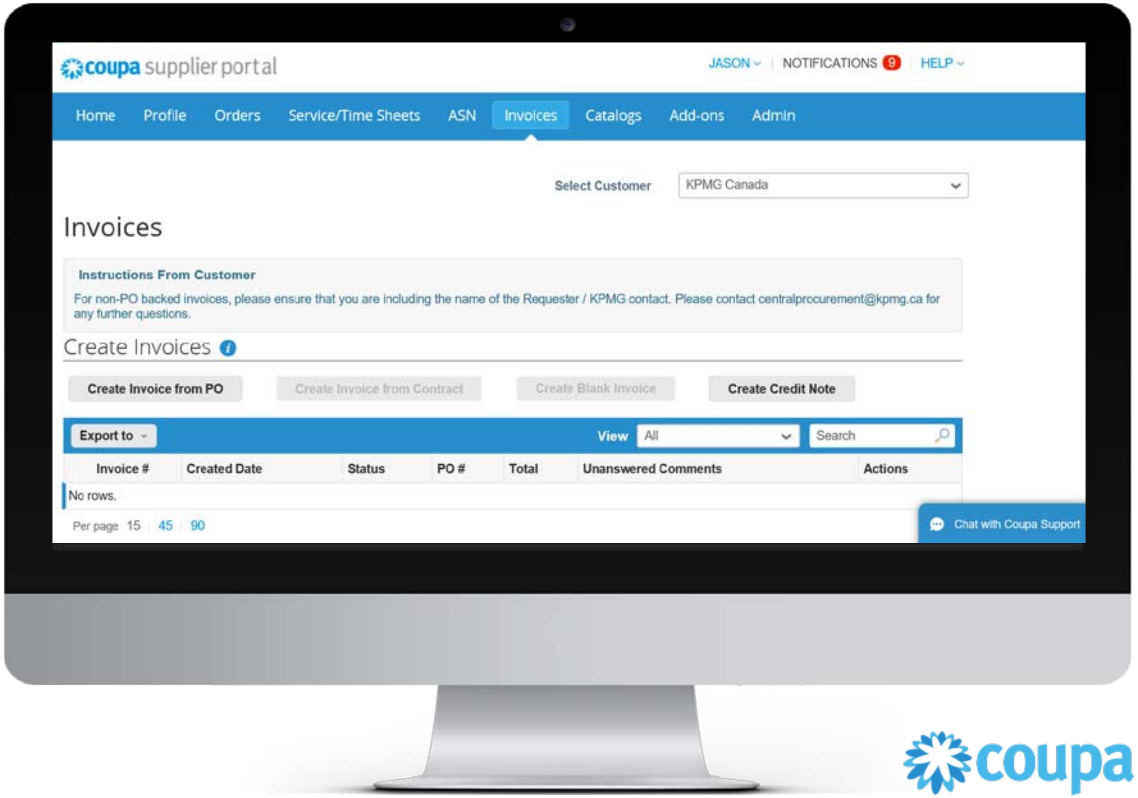
Get started with the CSP

Log in to the CSP – Existing Supplier

3. When viewing Invoices and Orders you will now be able to see KPMG Canada as a customer along with all of your existing customers.



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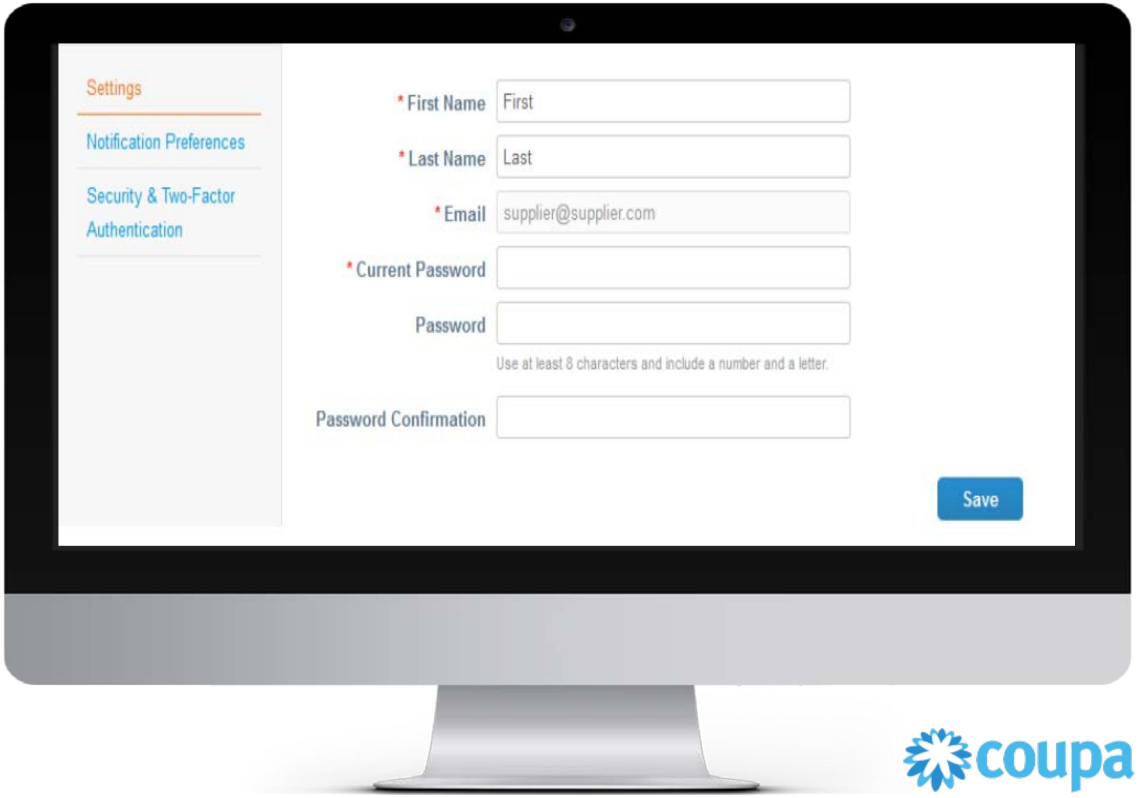
Get started with the CSP

Manage your Account

1. Once you **Log In**, you can manage your account under **My Account** by clicking your name link and then on the **Account Settings** link.
2. Here you can make changes to your personal information (name, photo, and password), set or modify your notification preferences, etc.

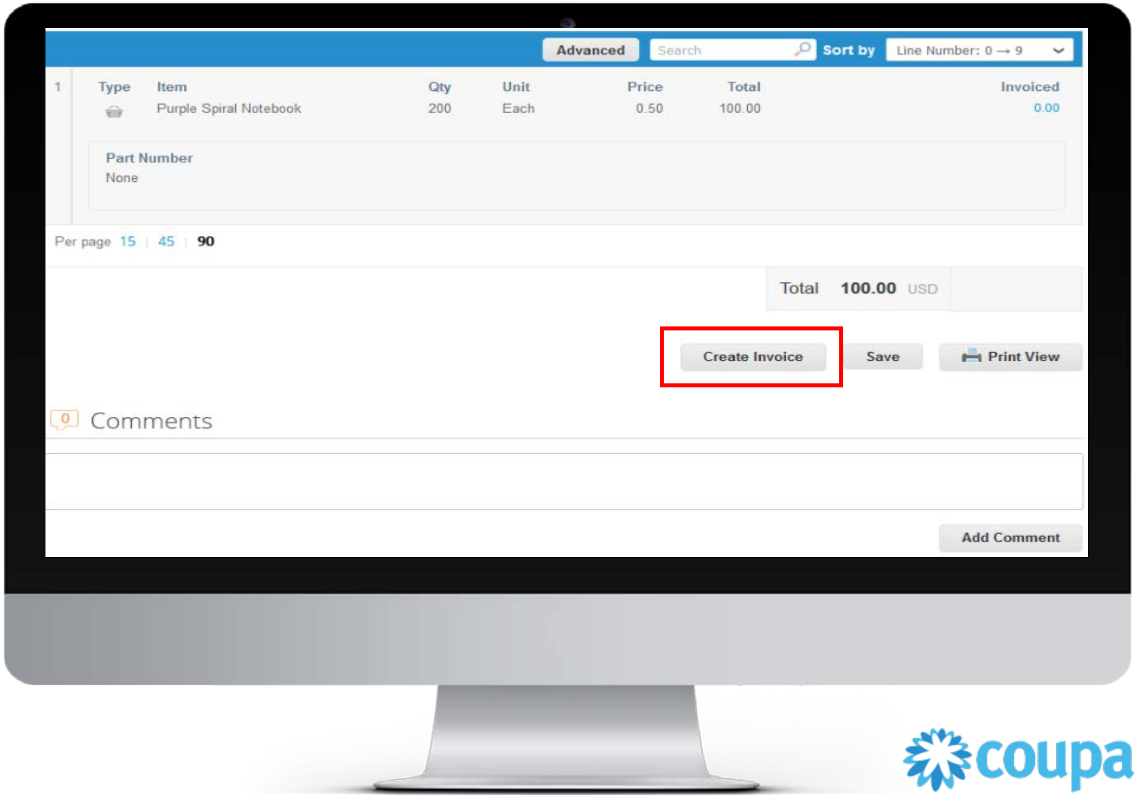


*You can access and edit your company information on the **Profile** page*

Working with the CSP

Create an Invoice from a PO

1. Log in to CSP and click on the Orders Tab
2. To flip a PO into an invoice, do one of the following:
    1. Click on the **Create Invoice icon** ( ) for the PO in the **Purchase Orders** table
    2. Click on the **PO Number** link to open the purchase and click on the **Create Invoice** button
3. When creating the invoice, fill in all necessary fields including mandatory fields marked with red asterisk.



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By 'flipping' the PO to an invoice directly on CSP will pre-populate most of the fields, hence making it easy and accurate

Working with the CSP

Create a credit note

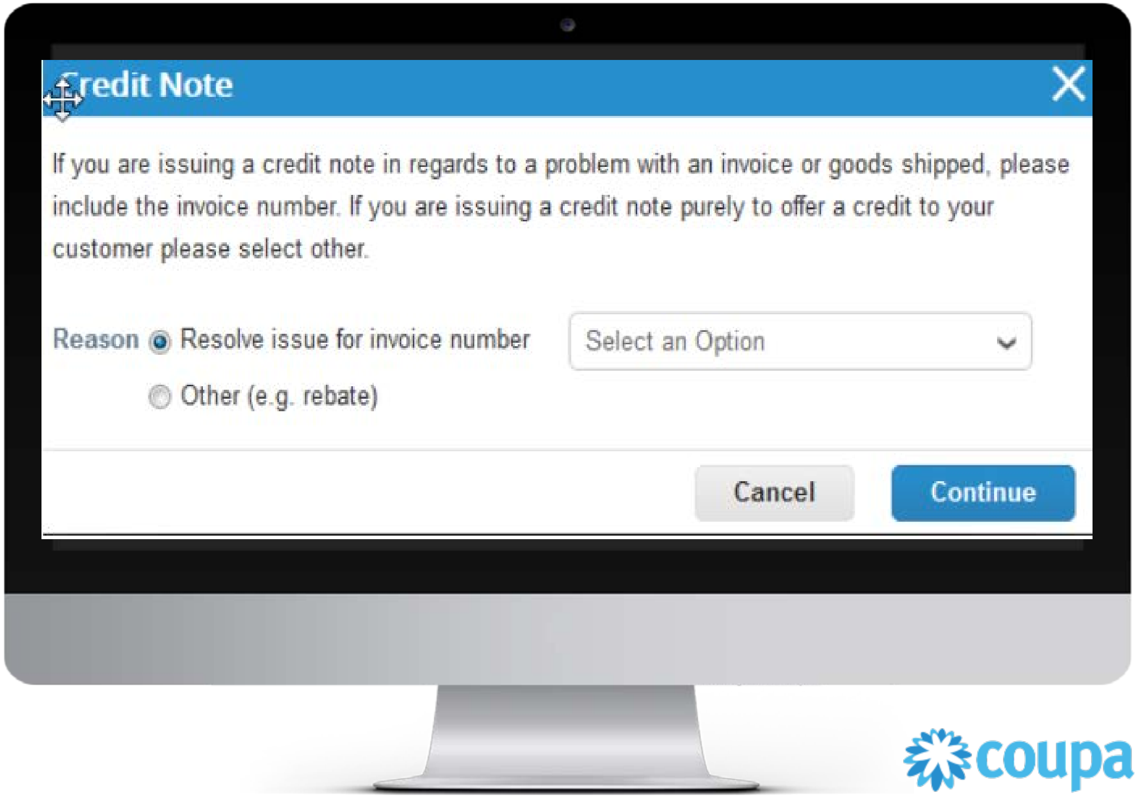
1. You can issue a credit note when you want to:

    a. Resolve a dispute on an invoice

    b. Record miscellaneous credit, for example, return/cancelation of goods, price adjustments, rebates and refunds

2. To create a credit note, click on the **Credit note** button under the **Invoices** table on the **Invoices** page

3. In the appearing **Credit Note** popup, select the reason for your credit note



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*Similarly to creating an invoice, you can create a credit note by clicking on the **Create Credit Note Icon*** for the PO in the **Actions** column of the **Purchase Order** table

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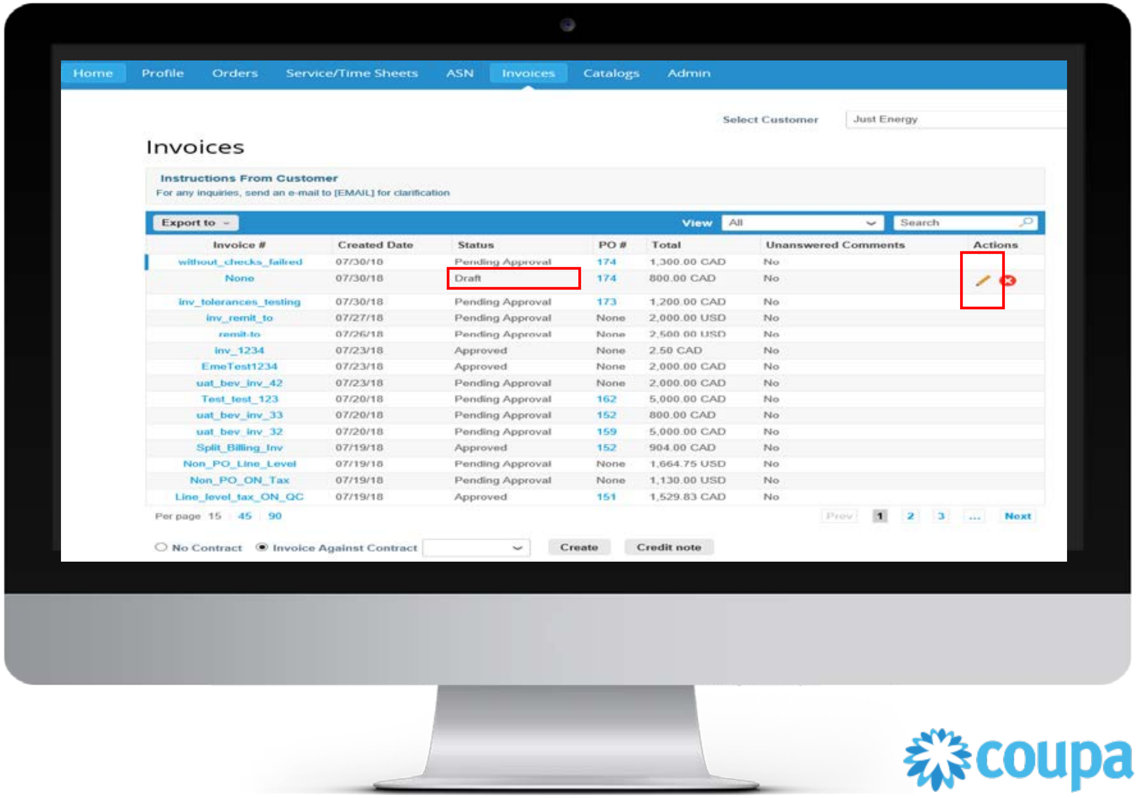
Working with the CSP

Viewing and Editing an Invoice

1. To edit a draft invoice, do one of the following:
    a. Click on the **Edit** ( ) icon for the invoice in the **invoices** table.
    b. Click on the **Invoice #** link to open the invoice and click the **Edit** button at the bottom of the invoice screen



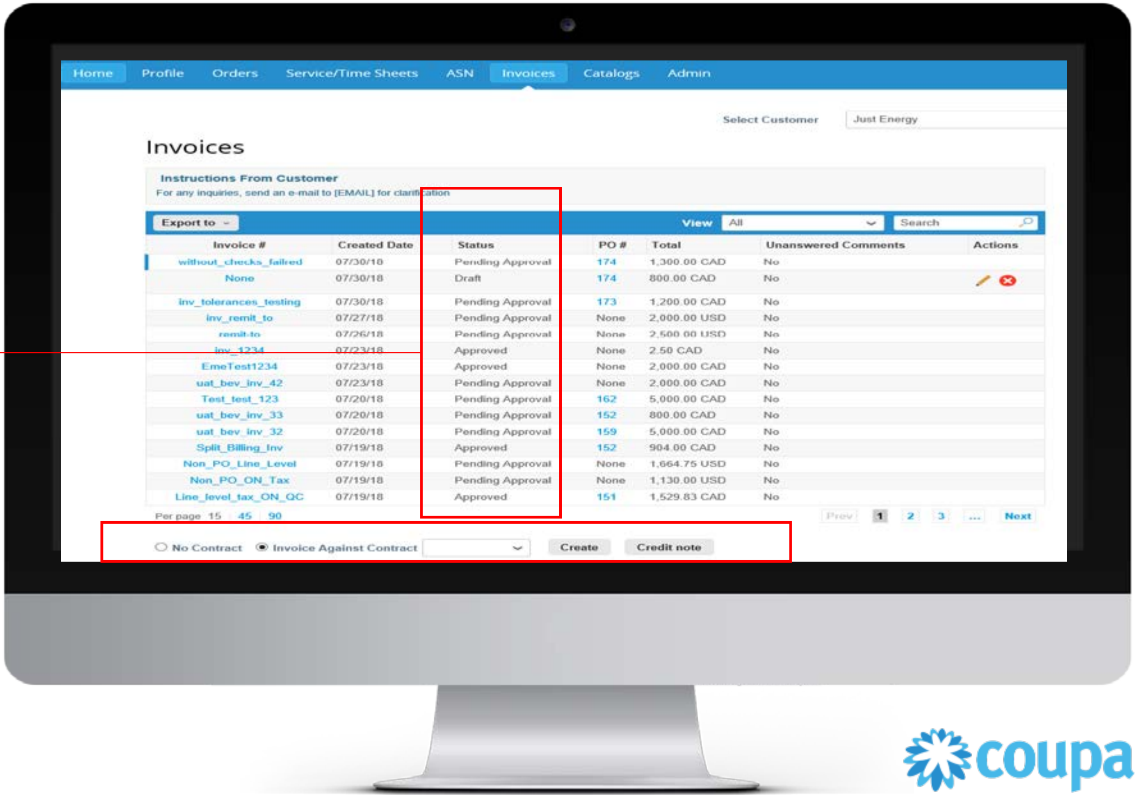
When creating an invoice against a contract, you must first select the contract from drop-down list

Working with the CSP

Creating a Non-PO or Contract Based Invoice

1. To create an invoice without a contract or against a contract, select the relevant radio button (**No contract** or **Invoice Against Contract**) under the **Invoices** table on the **Invoices** page and click **Create.**

The status column allows the supplier to have up-to-date status on their invoices



When creating an invoice against a contract, the supplier must first select the contract from drop-down list

Working with the CSP

Invoice Statuses

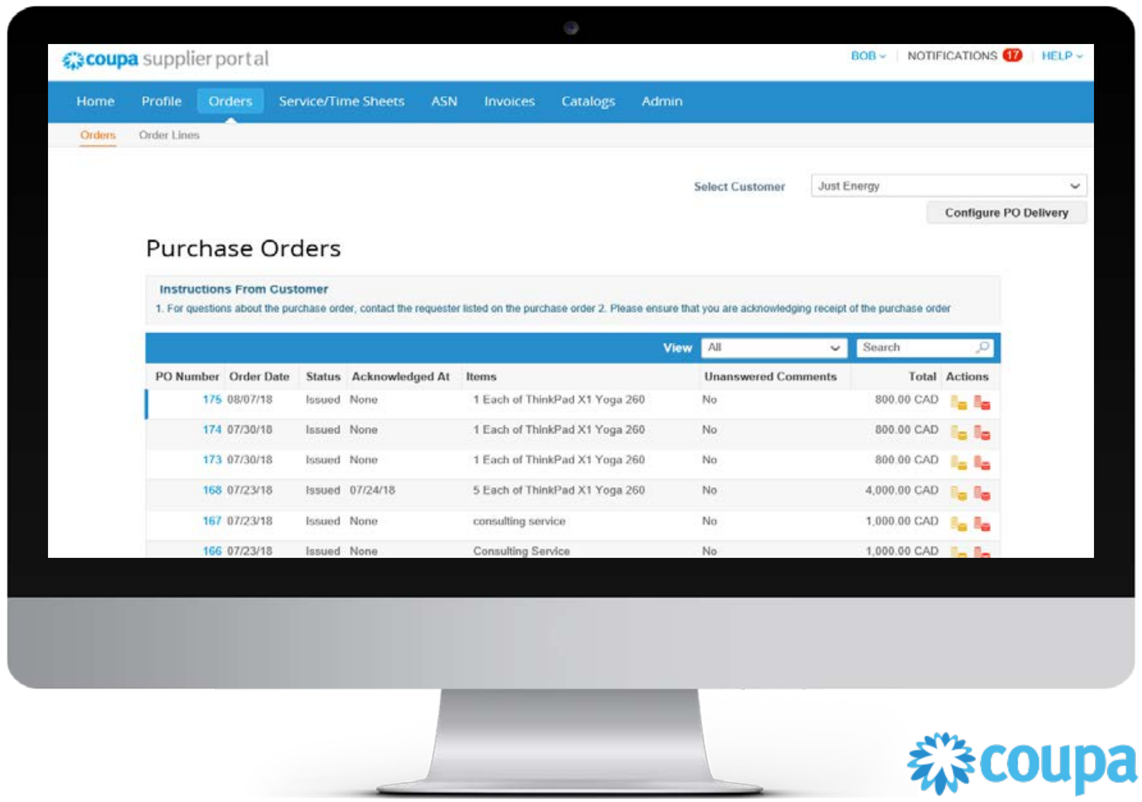
Invoices can have the following statuses

Status	Description
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. See Disputed invoices for more info.
Draft	The invoice has been created, but it hasn't been submitted to your customer 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 your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	There's something wrong with the invoice. Contact your customer to get the invoice back on track.

Working with the CSP

View and Manage POs

1. Click on the **Orders** tab on the main menu. The **Purchase Orders** page appears.
2. Under the **Purchase Orders** the supplier can see a table with all purchase orders received.



Directly from the **Purchase Orders** table, you can flip the POs to invoices or create a credit note.

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Working with the CSP

Purchase Order Statuses

Purchase orders can have the following statuses

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Canceled	The PO is cancelled and doesn't need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	There's something wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

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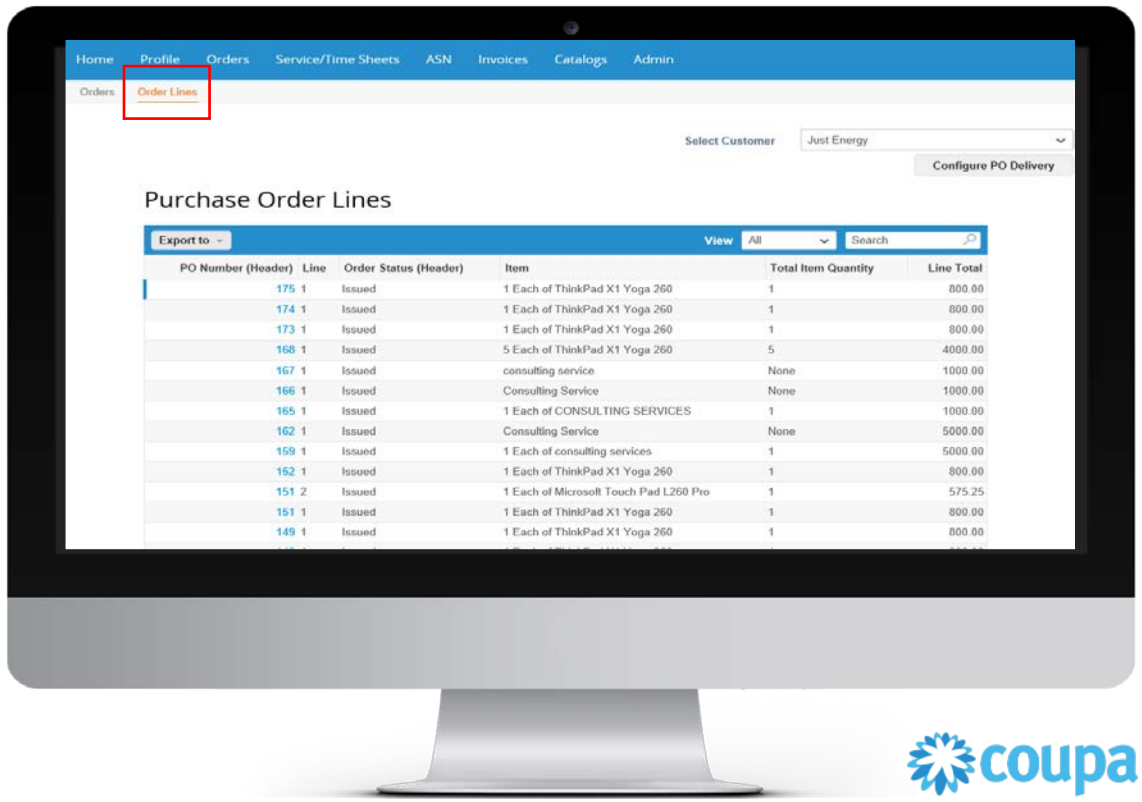
Working with the CSP

View PO Lines

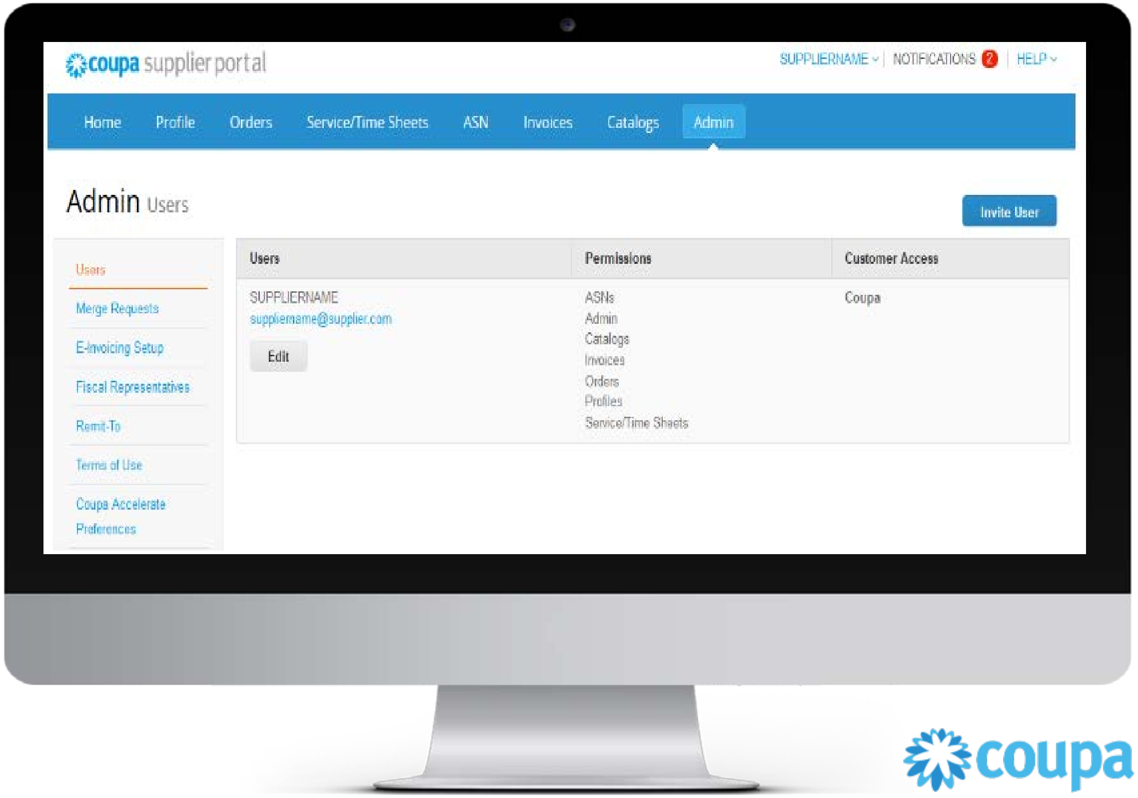
1. Click on the **Order Lines** tab to see info on the PO lines for each PO



Administer the CSP

Admin Page

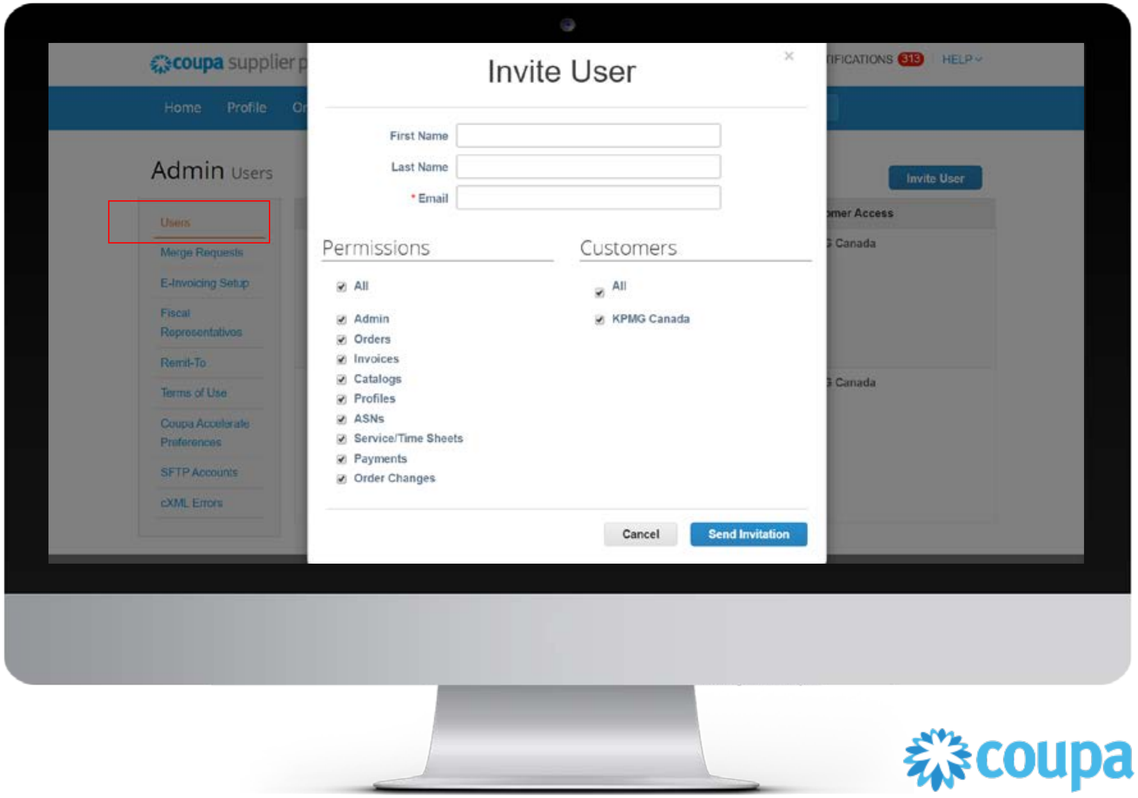
1. On the **Admin** page you can manage users, remit-to addresses set up electronic invoicing and much more
2. To access the Admin Page, click on the **Admin** Tab



Administer the CSP

Manage Users

1. You can invite users and giving them access to all or some features in the CSP
2. To invite new users:
    a. Go to the **Admin** Tab
    b. Click on the **Users** box on the left
    c. Click on the **Invite User** button
    d. Fill out the fields and select the permissions and customers you would like the new user to have access to



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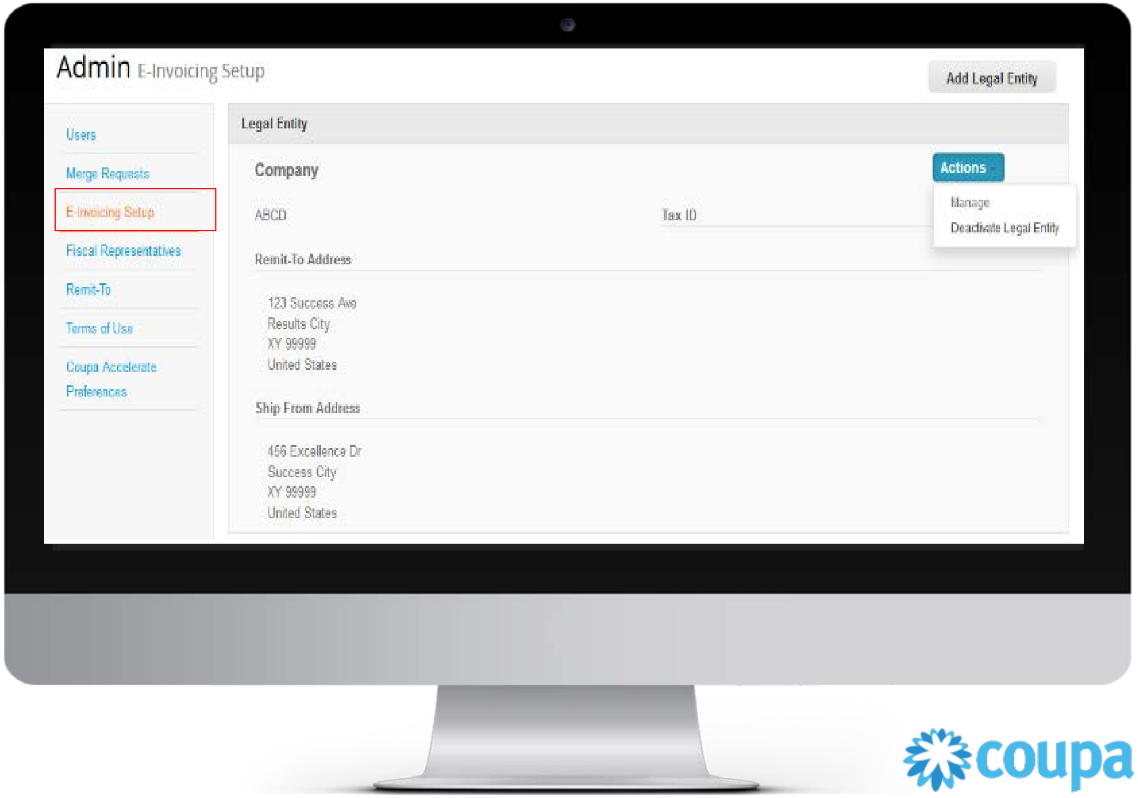
Administer the CSP

Set up E-Invoicing (1/2)

1. To set up your account to create e-invoices, clink on the **E-Invoicing Setup** link on the left of the **Admin** page.
2. Click on the **Add Legal Entity** button in the top right and enter the official name of your business registered with the government along with its location.
3. Click **Continue** and in fill out the remaining fields including mandatory fields shown with red asterisk



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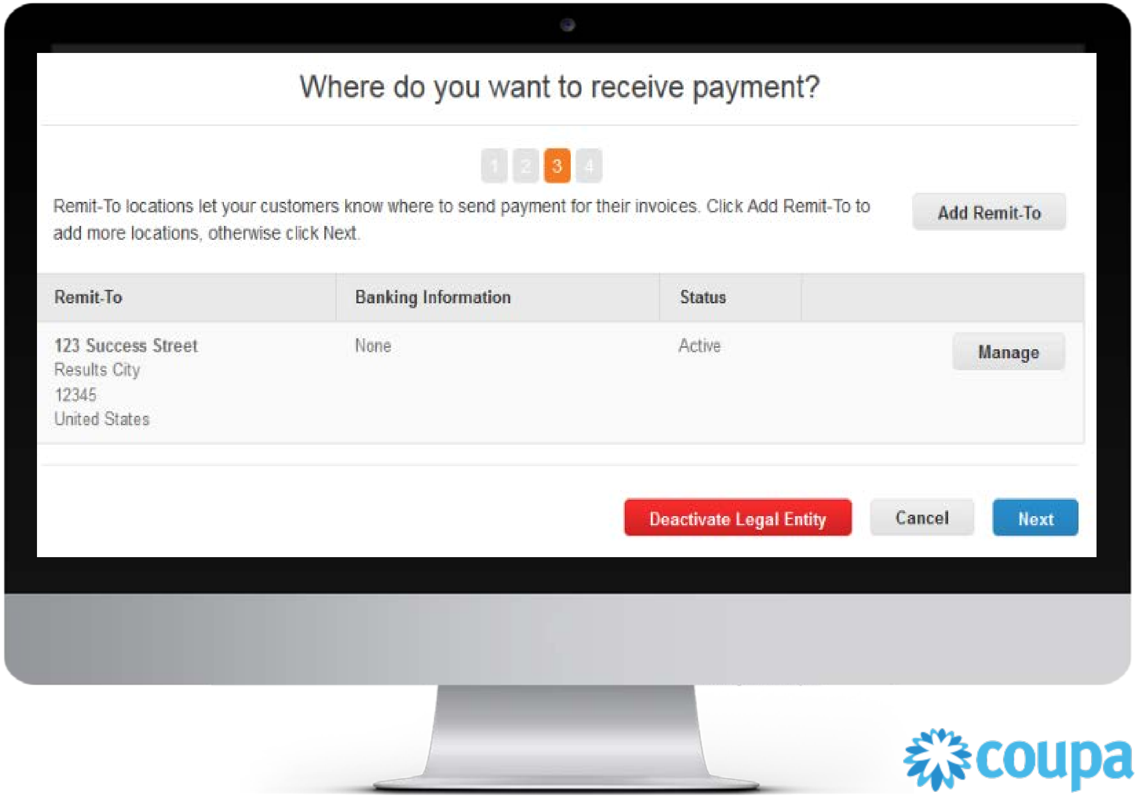
Administer the CSP

Set up E-Invoicing (2/2)

1. During creating a new entity in the portal, it will be required that the supplier put in the their remit-to information that the supplier's customer will be sending payments to
2. To add a new remit-to address click on the **Add Remit-To** button and fill in the necessary fields and click **Continue**



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Administer the CSP

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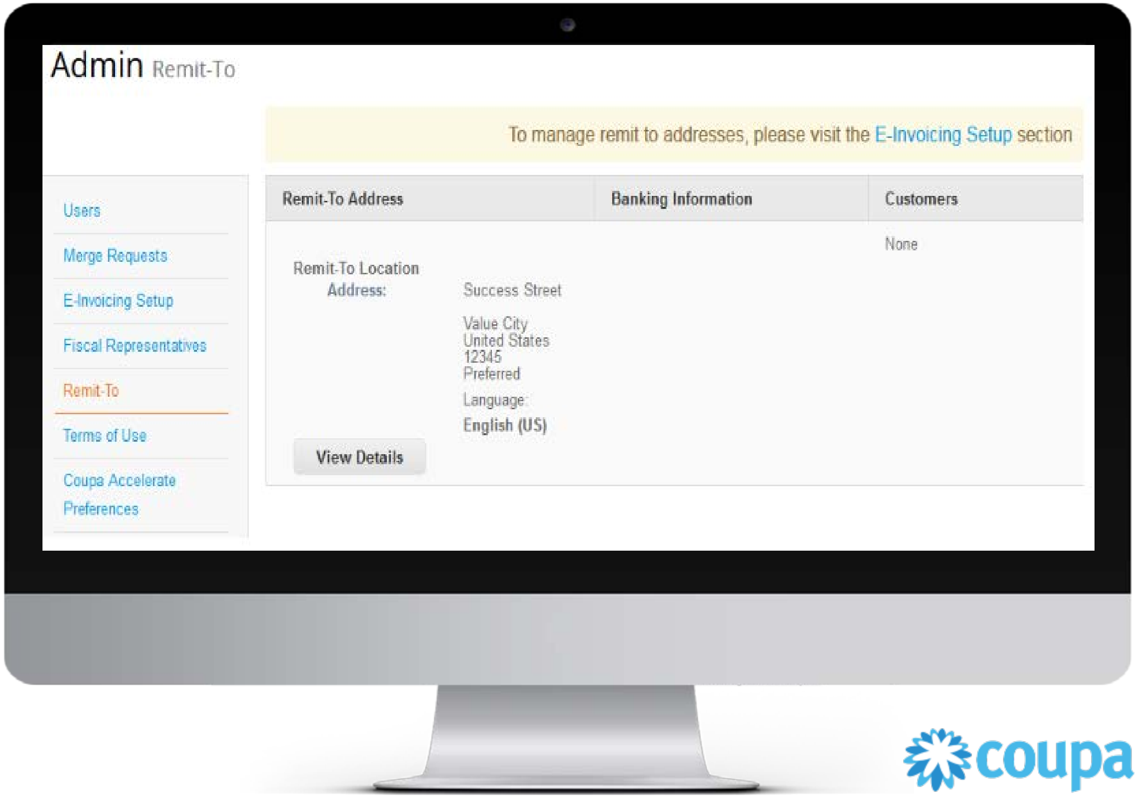
View Remit-To Information

1. Click on the **Admin** Tab and click on the **Remit-To** link on the left to view the list of remit-to addresses and their details
2. By clicking **View Details** will allow the supplier to see more information relating to their remit-to information



You can create additional Remit-To if you have more than one address

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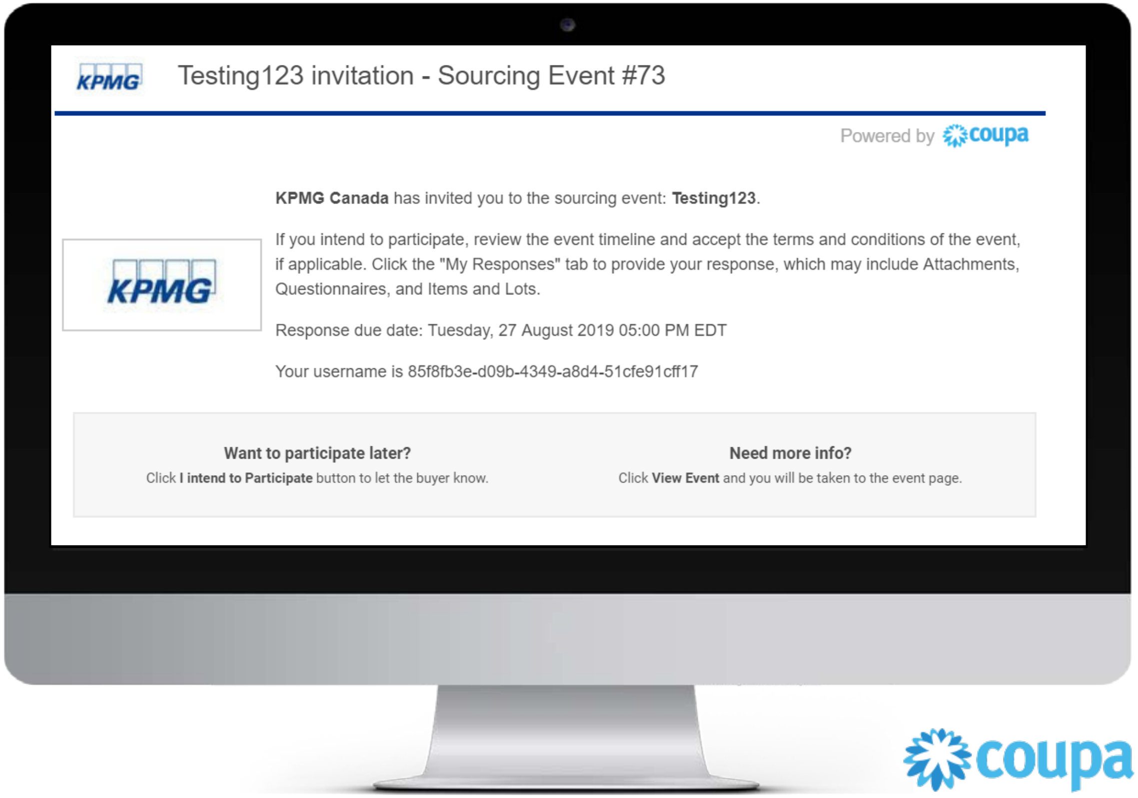
How Suppliers Participate in Events

Invitation to supplier to participate in an event

- Suppliers receive an e-mail from buyer with an invitation to participate in an upcoming RFI/RFP/RFQ/Reverse Auction event.
- Suppliers can access the event (RFI/RFP/RFQ/Reverse Auction) through the **invitation link** by following the instructions mentioned after clicking on the link.
- The supplier will respond to the event by clicking on a link which is shared to supplier via email. The supplier will be prompted to set up their credentials and log in to the sourcing response portal.
- Once the suppliers click on the activation link, suppliers need to set up their password.
- Suppliers only need to set their password while logging into the system for the first time.
- Suppliers can use the same log-in credentials for further events they are invited to.



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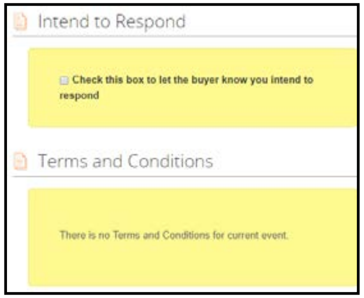
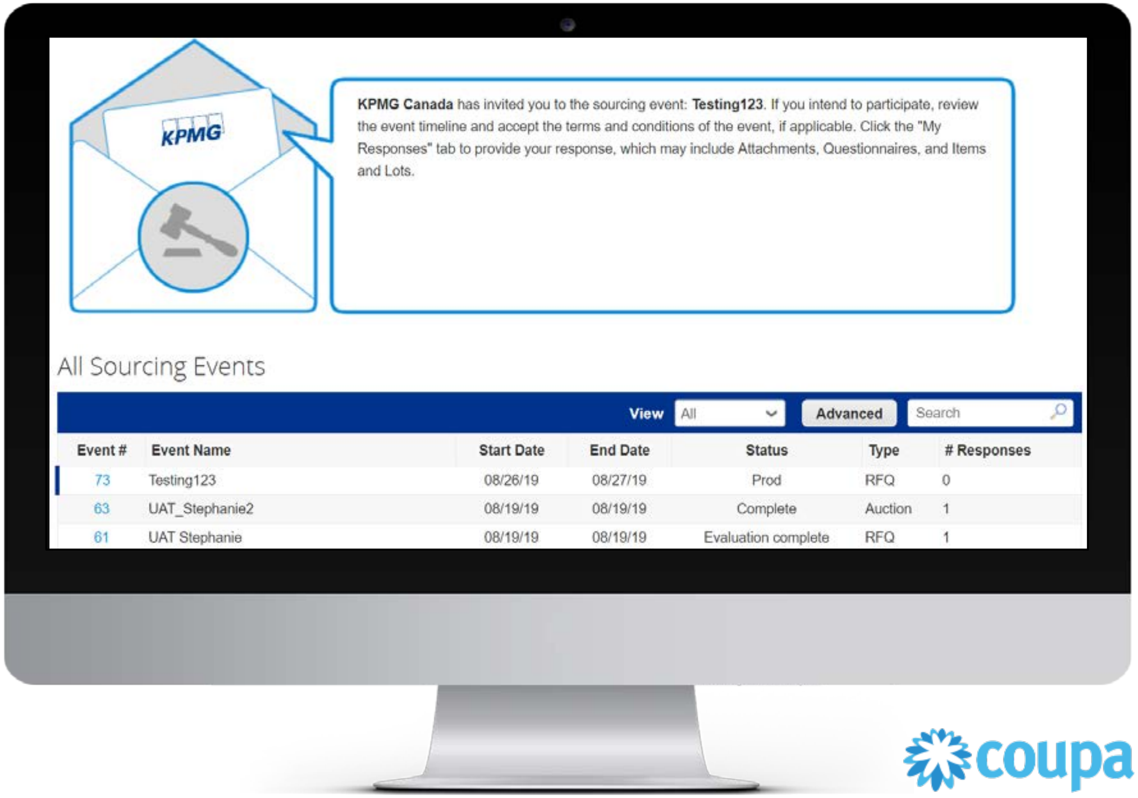
How Suppliers Participate in Events

Invitation to supplier to participate in an event

- Supplier can click on the event number to enter the event
- On the top right-hand corner, the supplier can see event end date and time.
- Suppliers can only respond within event start date and event end date.
- Supplier needs to click the checkbox in front of Intend to Respond and Terms and Conditions if applicable to view subsequent event sections such as Attachments, Questionnaire & Items and Lots.





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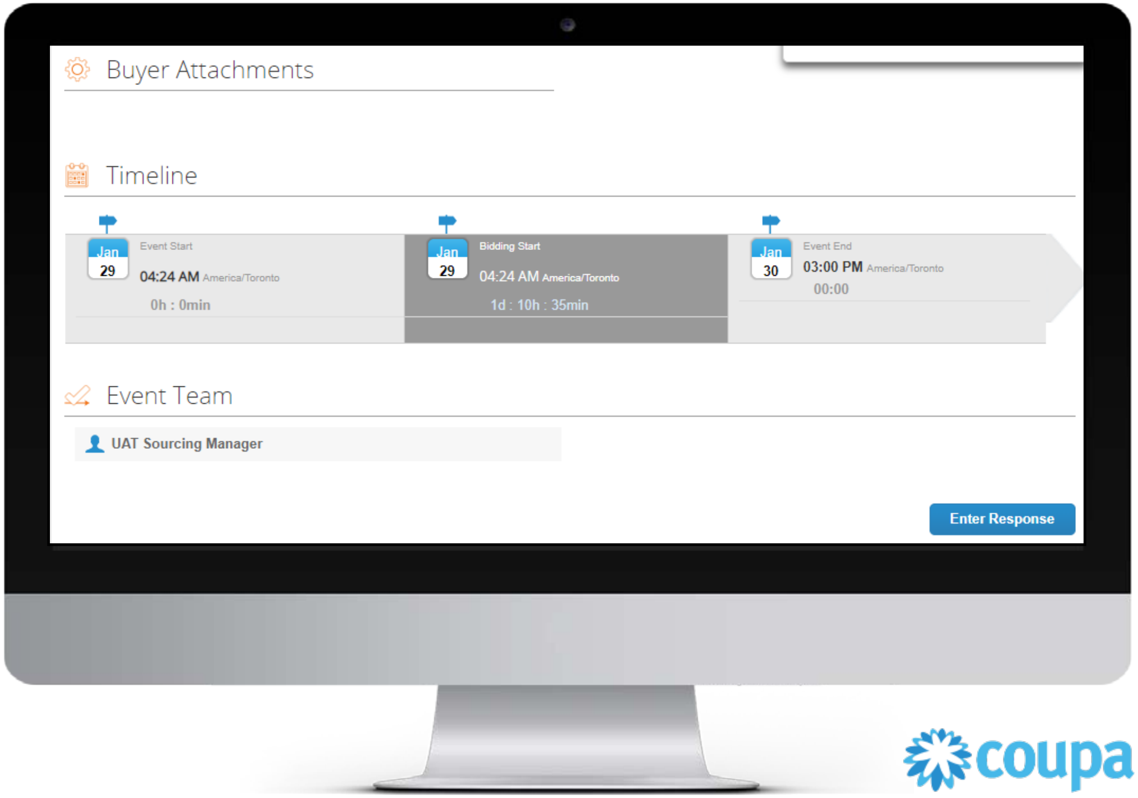
How Suppliers Participate in Events

Invitation to supplier to participate in an event

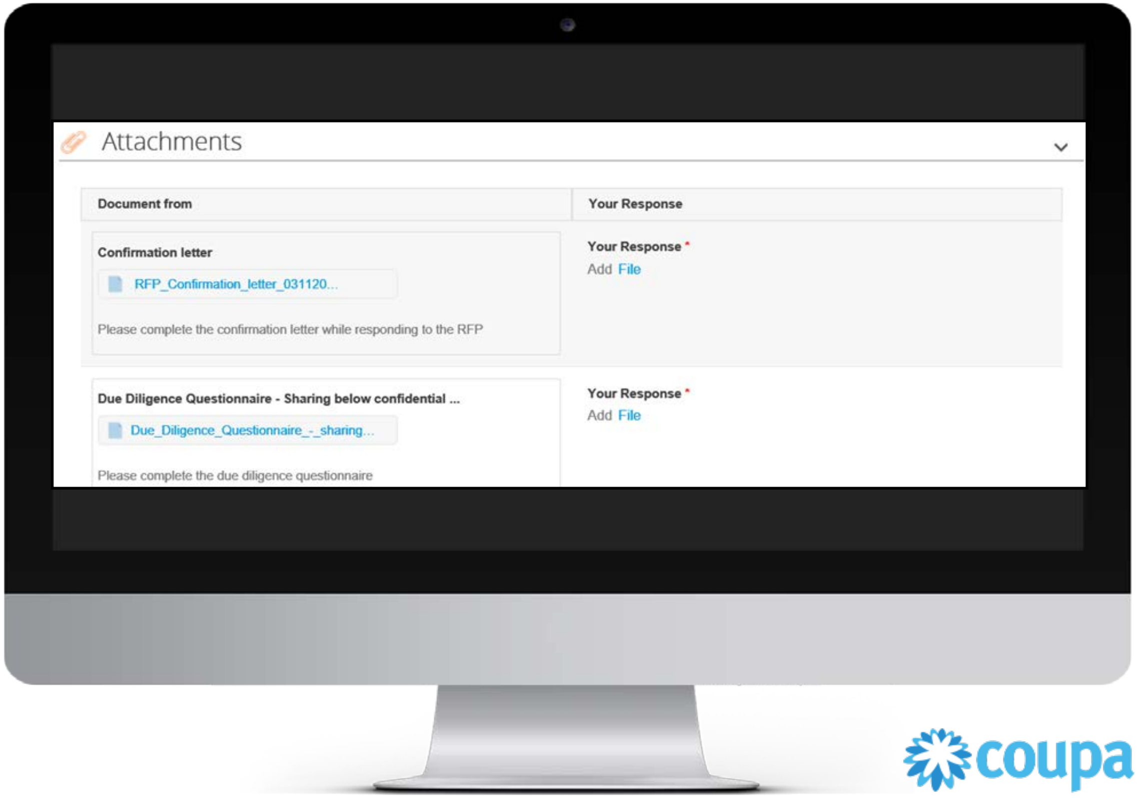
- The **Enter Response** button towards the bottom of the screen will only become active after the supplier clicks on the checkbox in front of Intend to Respond and Terms and Conditions if applicable.



How Suppliers Participate in Events

Attachments

- Suppliers can add multiple attachments to their responses.
- The attachments can be made mandatory by the buyer when submitting the event.



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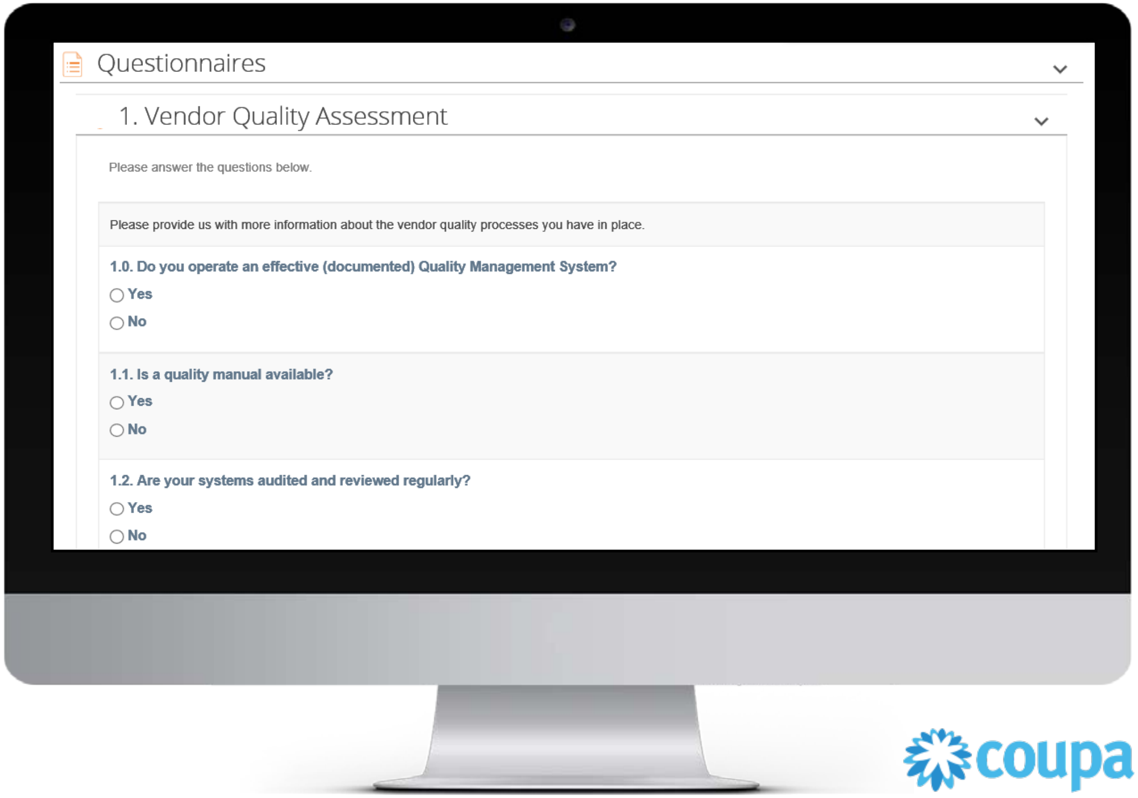
How Suppliers Participate in Events

Questionnaire

- The event owner can add a questionnaire at both event level and item level.
- The event owner can also make responding to the questionnaire mandatory.



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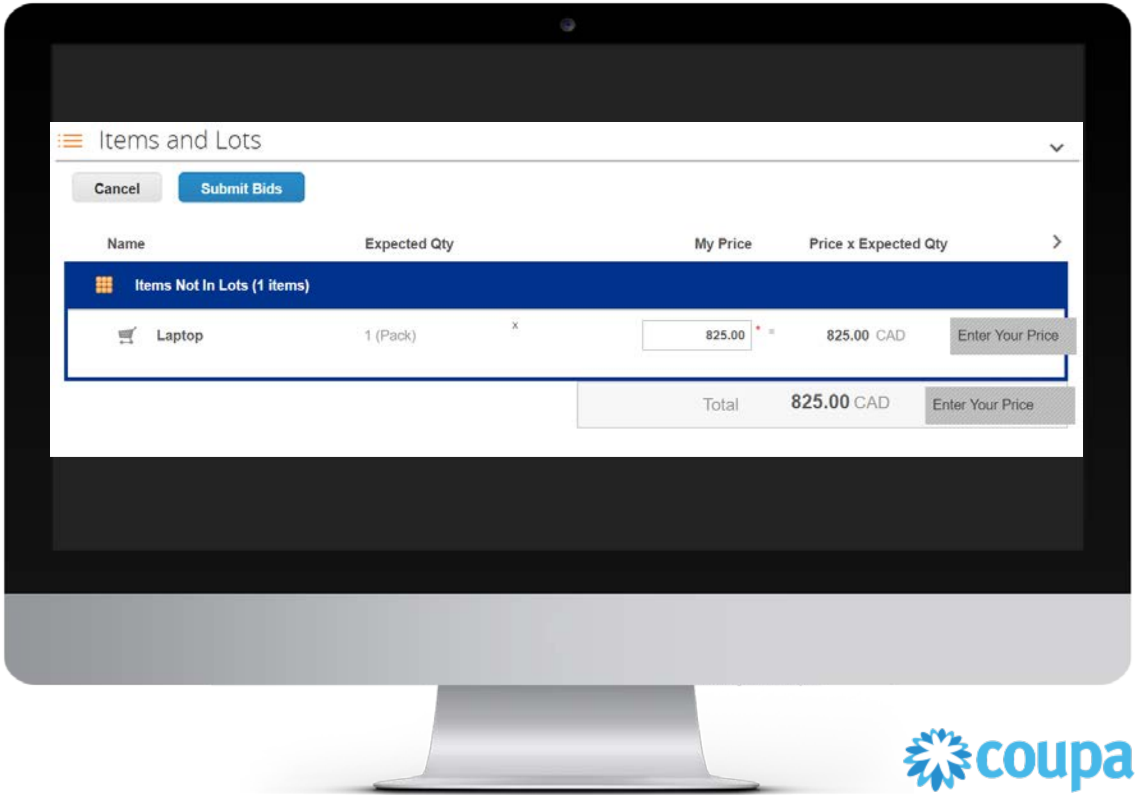
How Suppliers Participate in Events

Items and Lots

- The supplier provides the response to the item / services
- The buyer may also request additional information at an item level, such as:
  - Attachments
  - Questionnaire
  - Item description

* Supplier entered price



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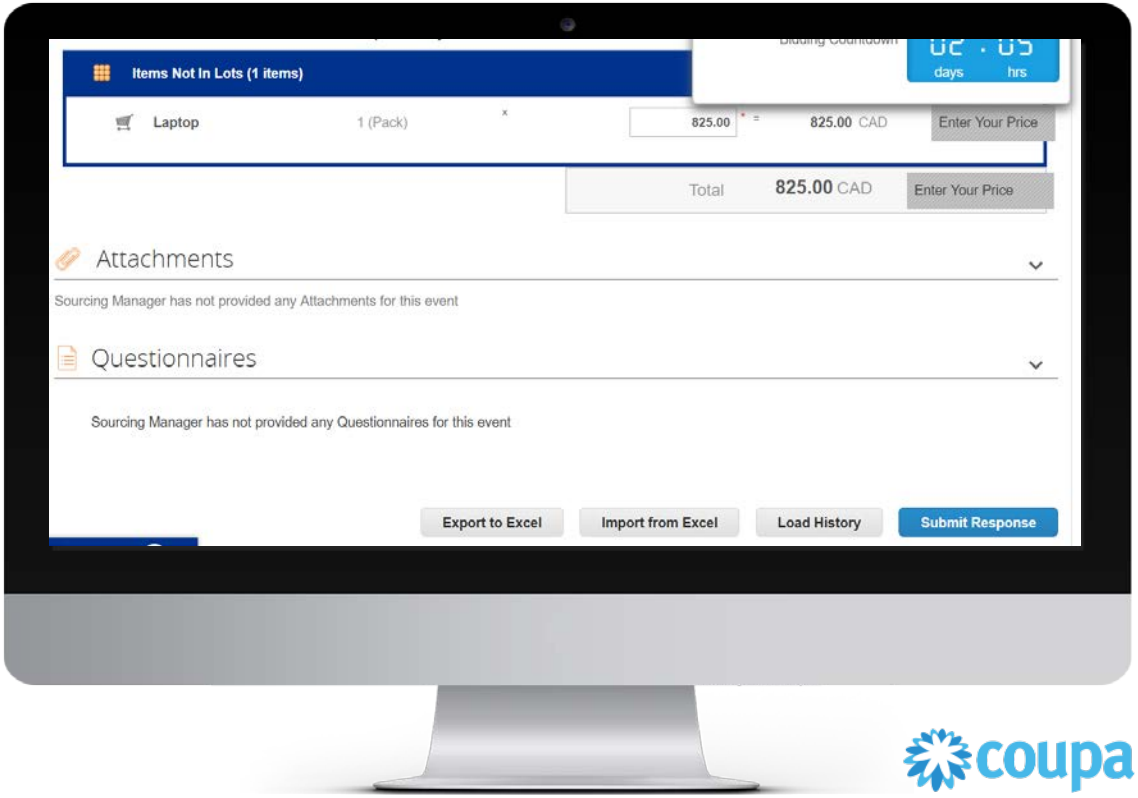
How Suppliers Participate in Events

Import and Export Response

- The supplier can choose to enter their response by CSV import if they wish
- The supplier can export response and allows view and export history
- Once ready, the supplier can submit response to buyer



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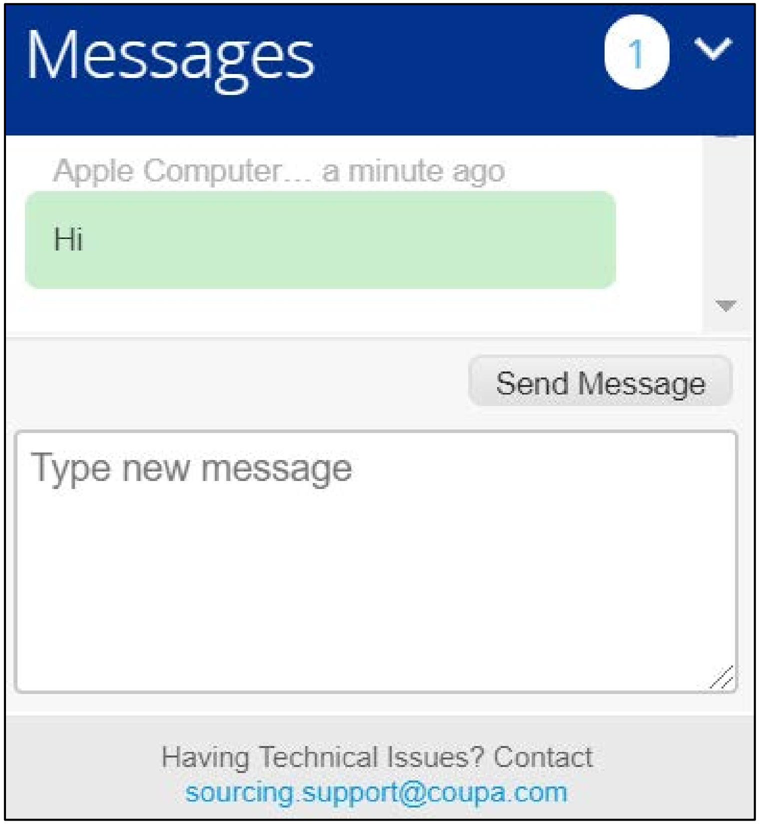
How Suppliers Participate in Events

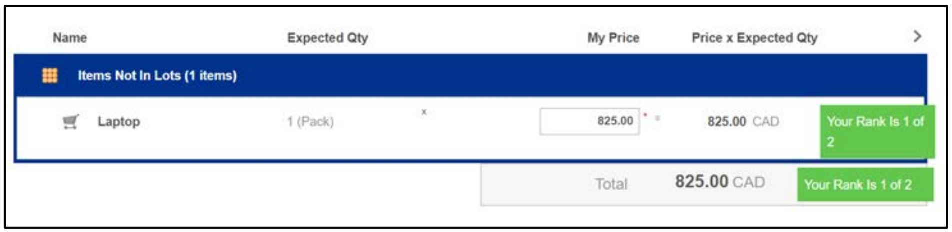
Message Center



- Suppliers can communicate with the buyers via the message centre
- The communication through message centre will also be received in the supplier's email.

Suppliers Participating in Live Auction

Live Auction



- The steps to respond to an auction event are the same as RFI/RFP/RFQ. The pre-bidding steps are the same where suppliers need to fill in their details, prices, etc. The only difference comes at the stage of participating in a live auction.
- Based on the settings the buyer has set, the suppliers will be able to either view their rank only, or view their rank in comparison to other suppliers or just the best price.
- For example, the suppliers will see one of the below options depending on the settings the buyer has enabled:

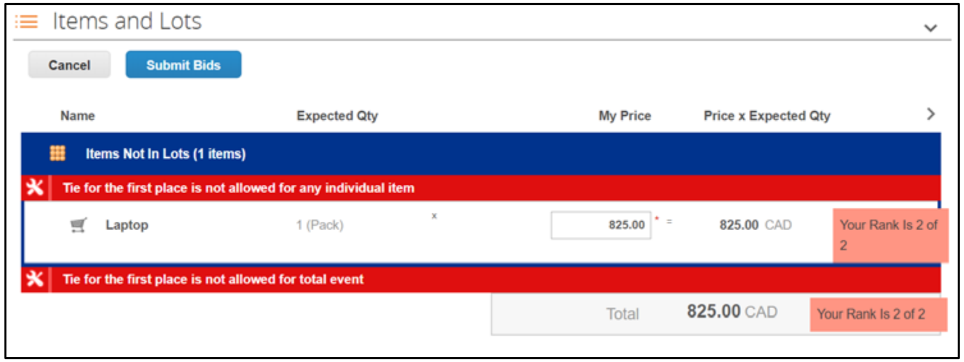
  “Your Rank is 4 of 7”

  “Your Rank is 4”

  “The best price for this item is $430”
- Suppliers cannot see who else is competing in the bidding at any time.

Suppliers Participating in Live Auction

Live Auction



- In case the supplier's bid is the same as another supplier, and the buyer has not allowed tie bids, the supplier will see the below window. In this case, the supplier needs to change his or her bid and improve the bid by a threshold percentage or by a specified dollar amount that the buyer has set.
- The supplier's rank will get updated if another supplier bids lower than them. It will be updated only if the buyer has activated view rank option for the suppliers. Suppliers can change their prices and submit bids throughout the auction event. Once the suppliers enter their final bid, they can click on **Submit Response**
- Note: as of R22, Dutch Reverse Auctions are now a selectable option alongside regular Reverse Auctions.

Thank you!