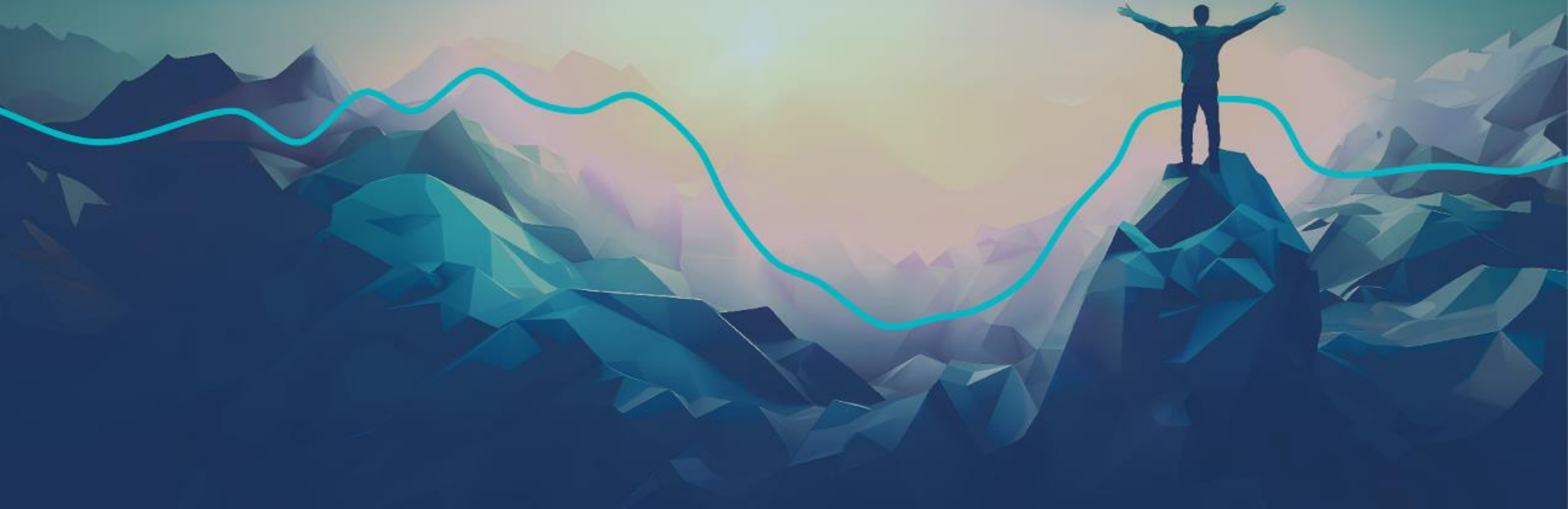
Coupa Training

06 August 2024

Coupa Supplier Portal



SUPPLY CHAIN PARTNER

G42

Objectives

In this module you will learn

01 Understand the vision of G42 Coupa procurement implementation

02 Understand functionalities of Coupa Supplier Portal (CSP)

03 Get familiar with the Coupa process and supplier benefits

04 Frequently asked questions & resources

Agenda

Coupa training

Why Coupa?

Benefits of the Coupa Supplier Portal

Receive and view purchase orders and set up delivery methods.

Manage your public and customer-specific company profiles and remit-to information.

View, create, edit, and submit against purchase orders.

Check the status of transactions with your customers.

Create, view, and send invoices.

Coupa Functionalities

Coupa can be used for the following activities

- Receive RFPs, RFQs, and submit response to G42 (non CSP)
- Submit legal agreements & contracts
- Receive and acknowledge Purchase Orders
- Create and submit invoices
- Check payment statuses
- Onboard and communicate master data changes to G42

Coupa for Suppliers

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.

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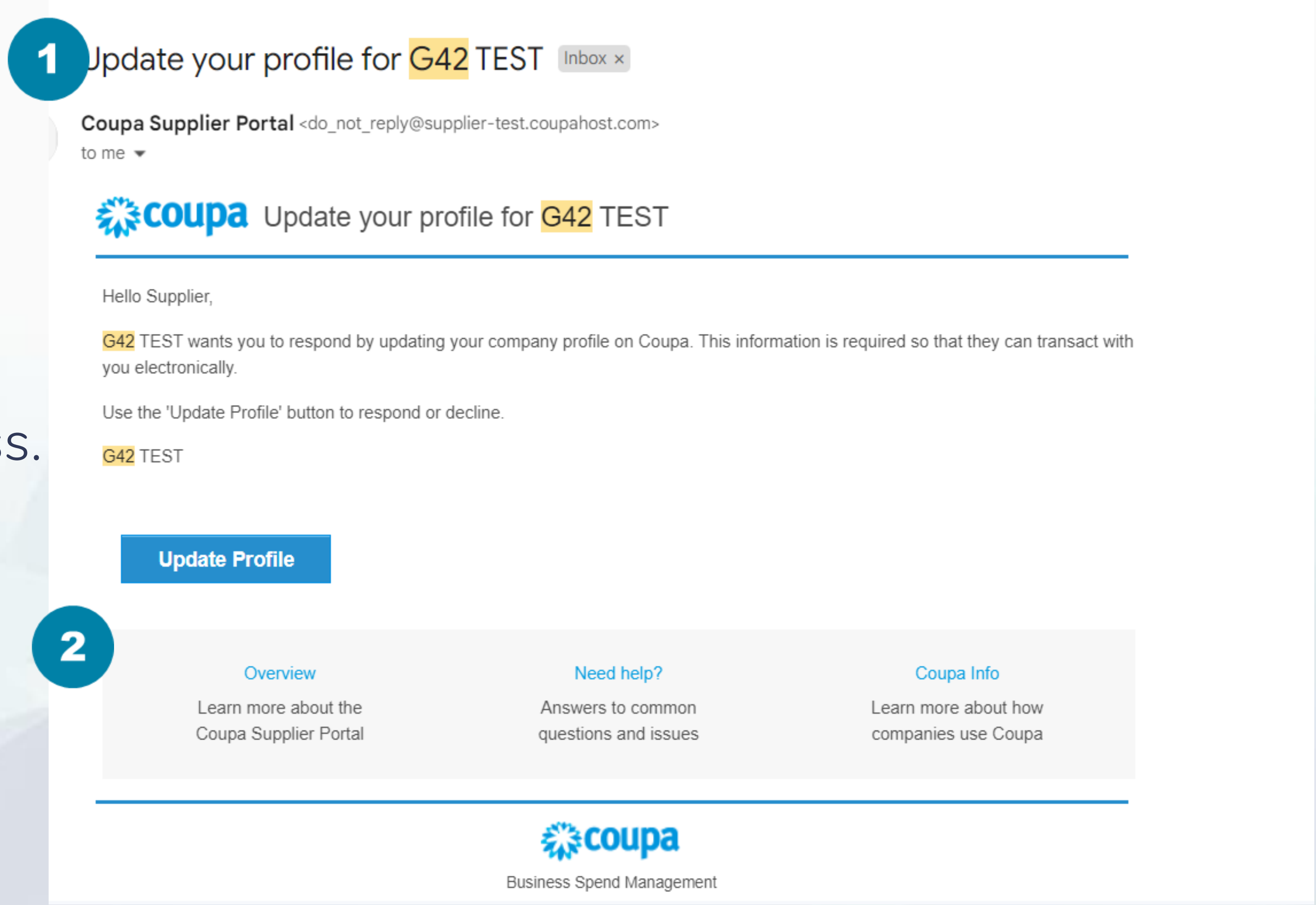
Coupa Supplier Portal Login

In this section you will learn how to register and log in to the supplier portal

1. An invitation to register with Coupa will arrive in your inbox.

2. At the bottom of the email, you will find two options:

Select the update profile option to continue with the registration process.

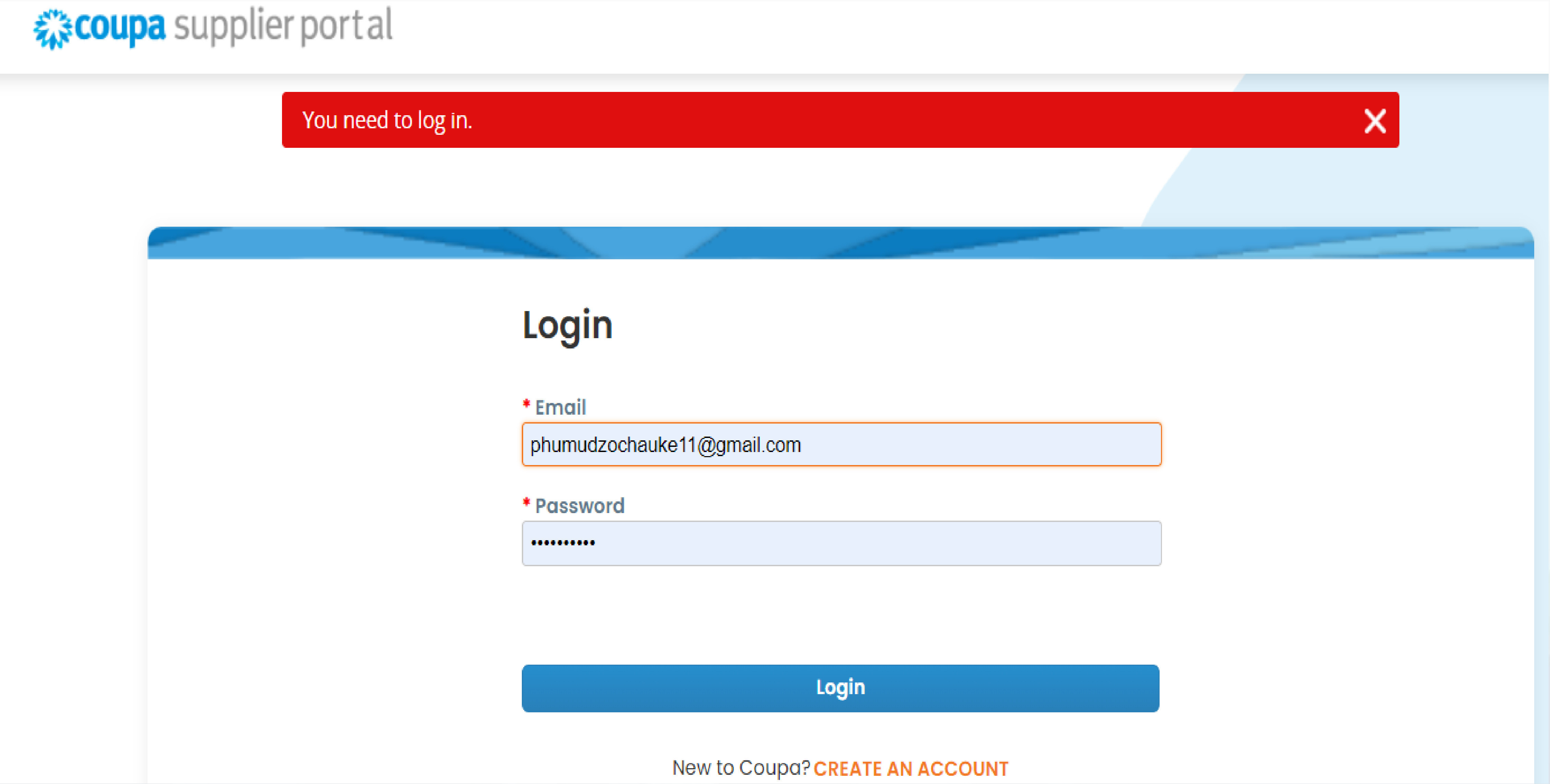


NOTE: The invitation is sent to the supplier main email that G42 has, the registration must be done by the person who will administer the portal. Later you will be able to add more users

An invite with a Coupa registration link will be sent out to all existing/current suppliers who have a vendor number

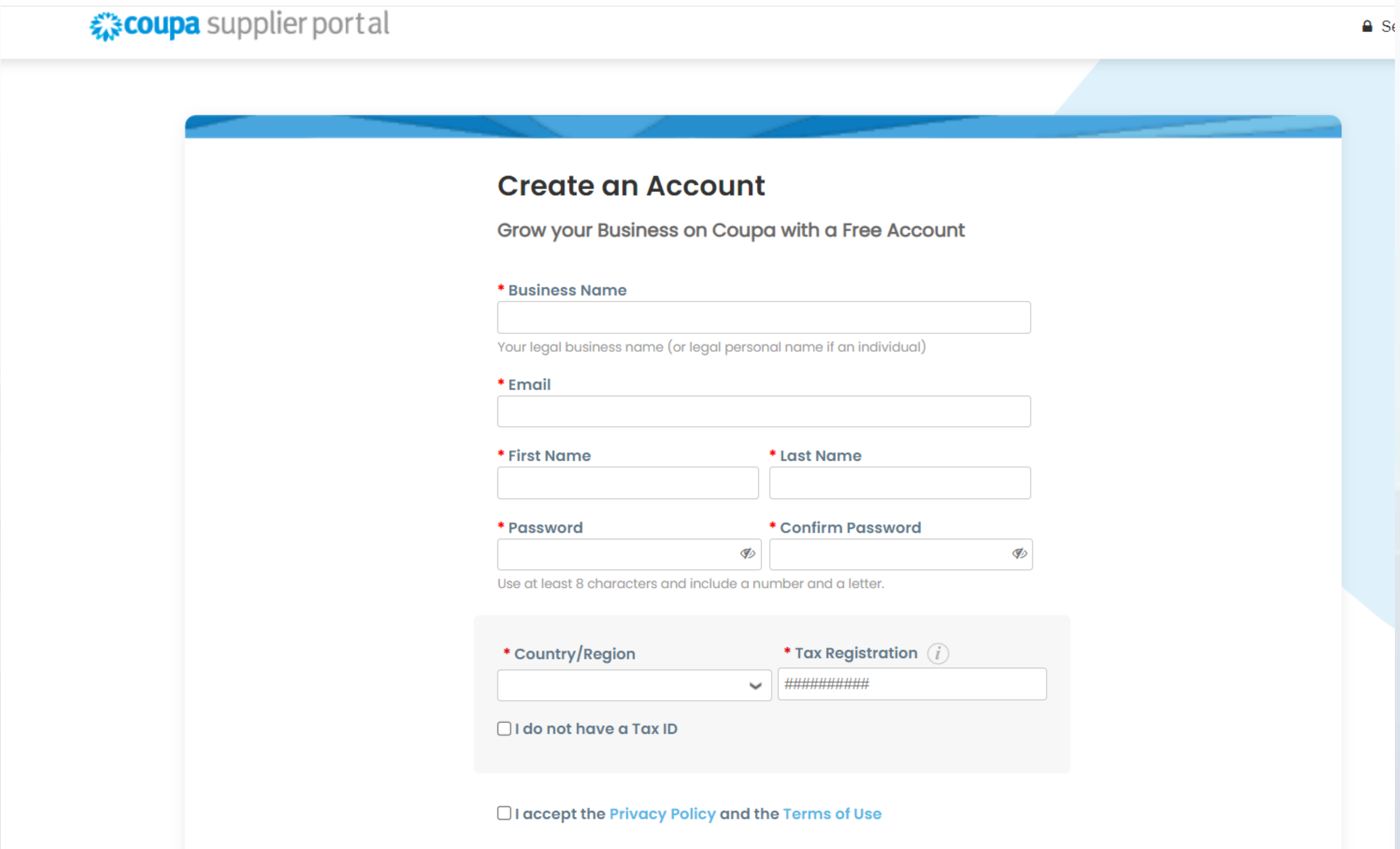
In this section you will learn how to register and log in to the supplier portal

- Suppliers who already have a Coupa account can continue to put in their email and password to log in.



In this section you will learn how to register and log in to the supplier portal

- Suppliers logging into CSP for the 1st time will be prompted to update a Basic Profile by entering the following details: **Company Name, Country/Region, Tax Registration, Address/ Line 1, City, Postal Code (Mandatory) Website, Address Line 2, State (Optional)**



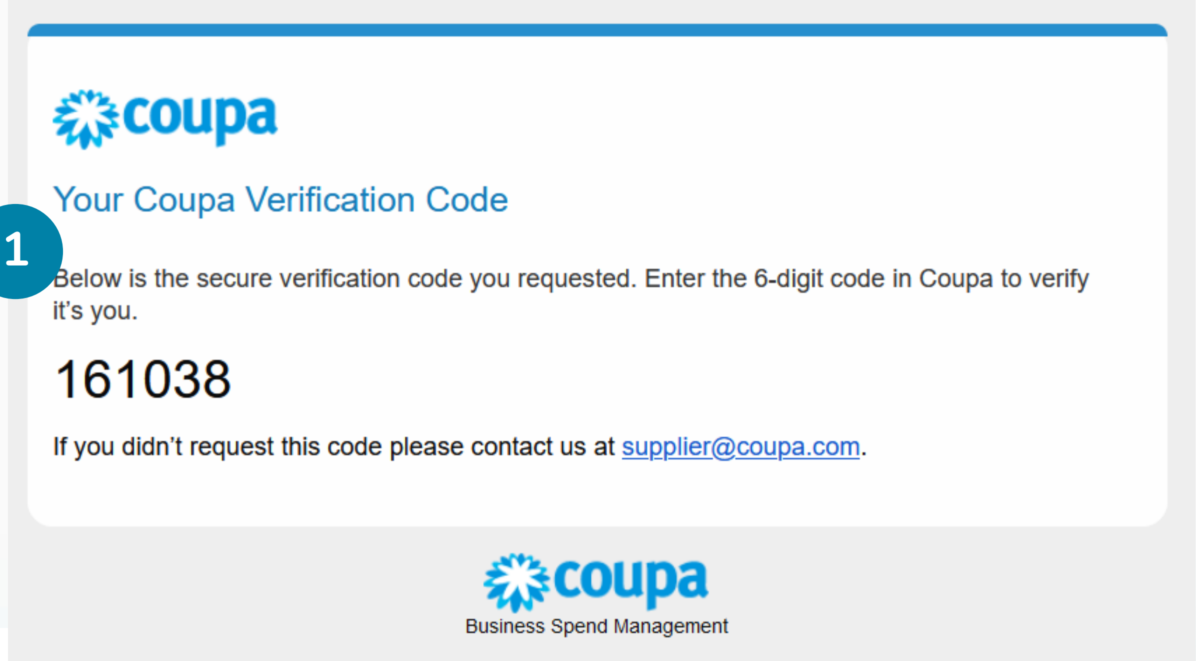
Supplier portal login

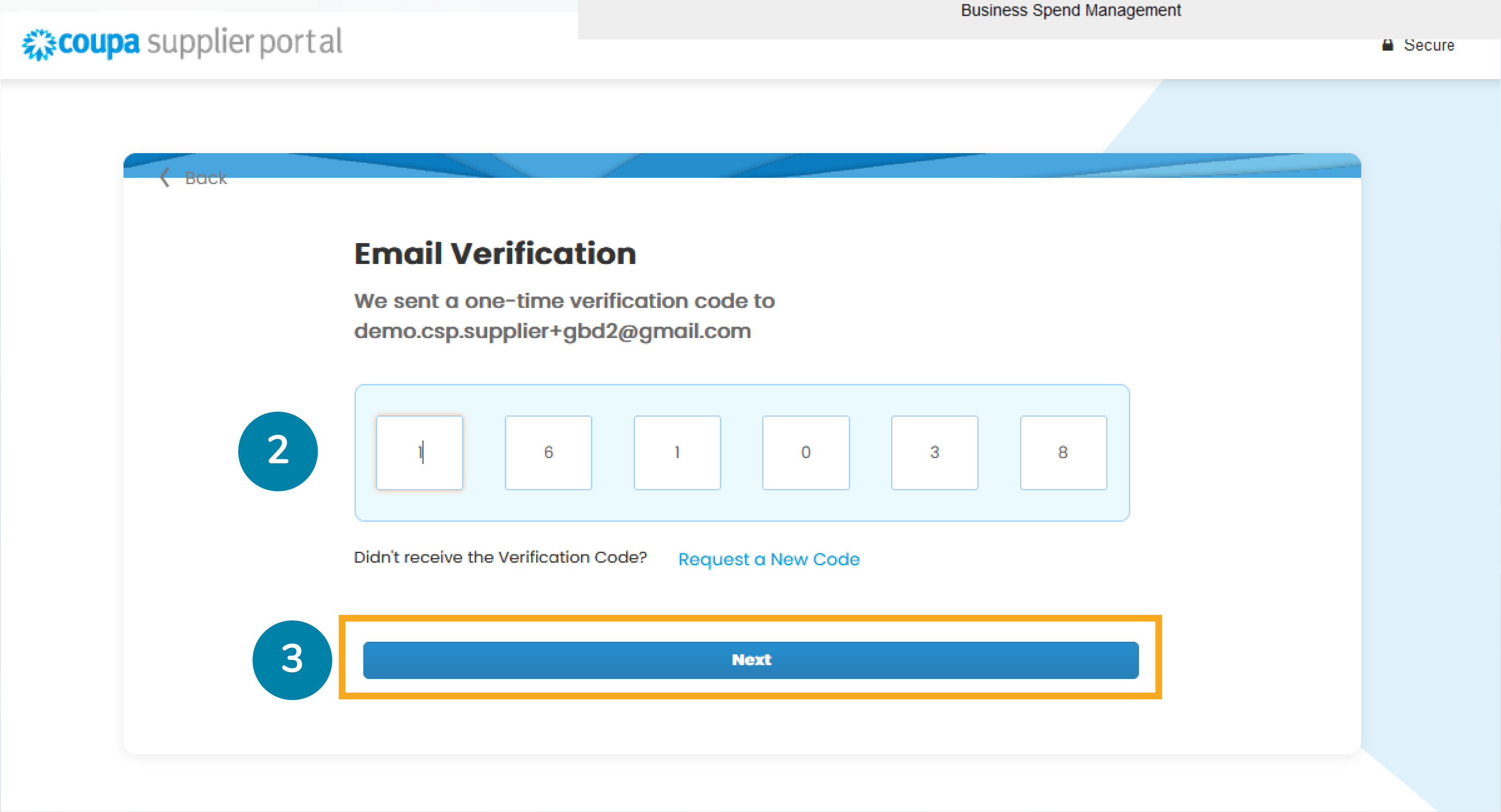
In this session you will learn how to register and log in to the supplier portal

1 You will be asked to verify your email address by entering the OTP sent to your email address.

2 Check your email for your unique Coupa Verification Code.

Copy the number in the email and paste into the fields on the Email Verification screen.





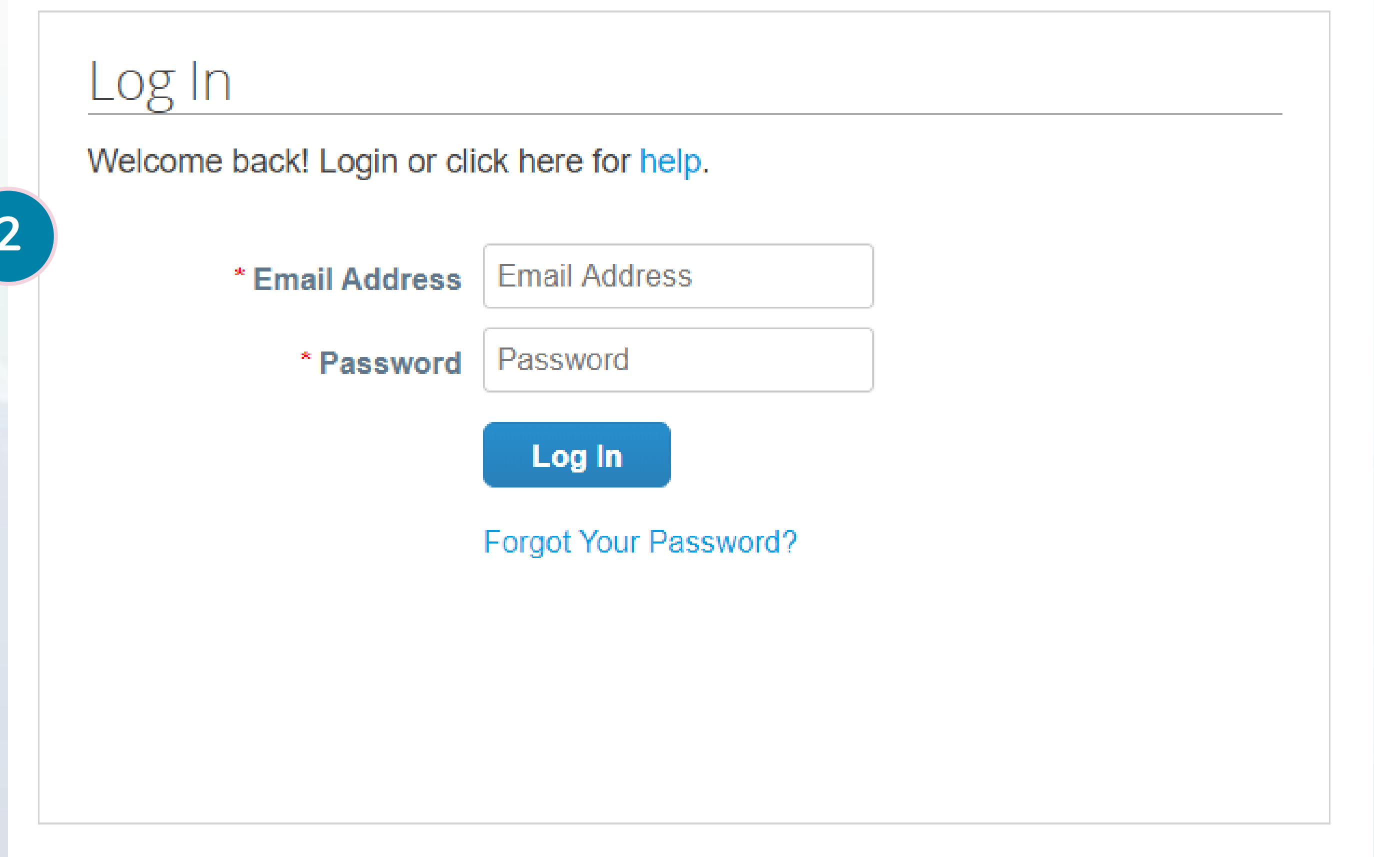
3 Click **Next** to continue setting up your profile.

In this section you will learn how to log in to the portal once you have registered

1 Once you have registered in the platform, you must access the following page: https://supplier.coupahost.com/

2 Fill in the data with your email and password and click on login.

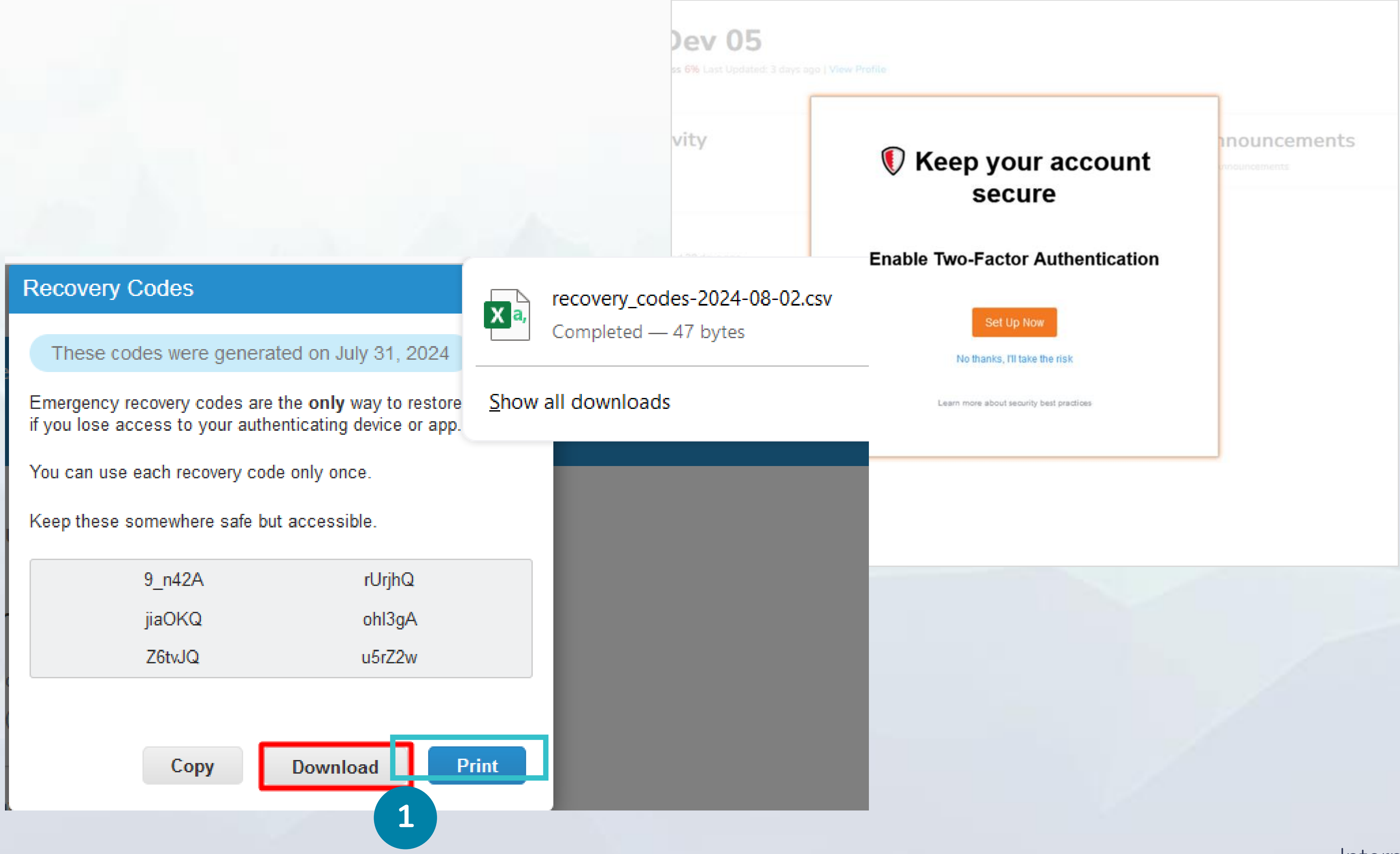
2



Once you have registered in the platform, you must access the following page: https://supplier.coupahost.com/

The Coupa Supplier Portal offers multi factor authentication as an additional security measure on your account but you are not required to enable this.

1 If you choose the enable MFA for your user profile, **it's important to save your recovery codes.**



NOTE: Be sure to Download a copy of your recovery codes. If you don't have your recovery codes, you may not be able to access or make changes to your account.

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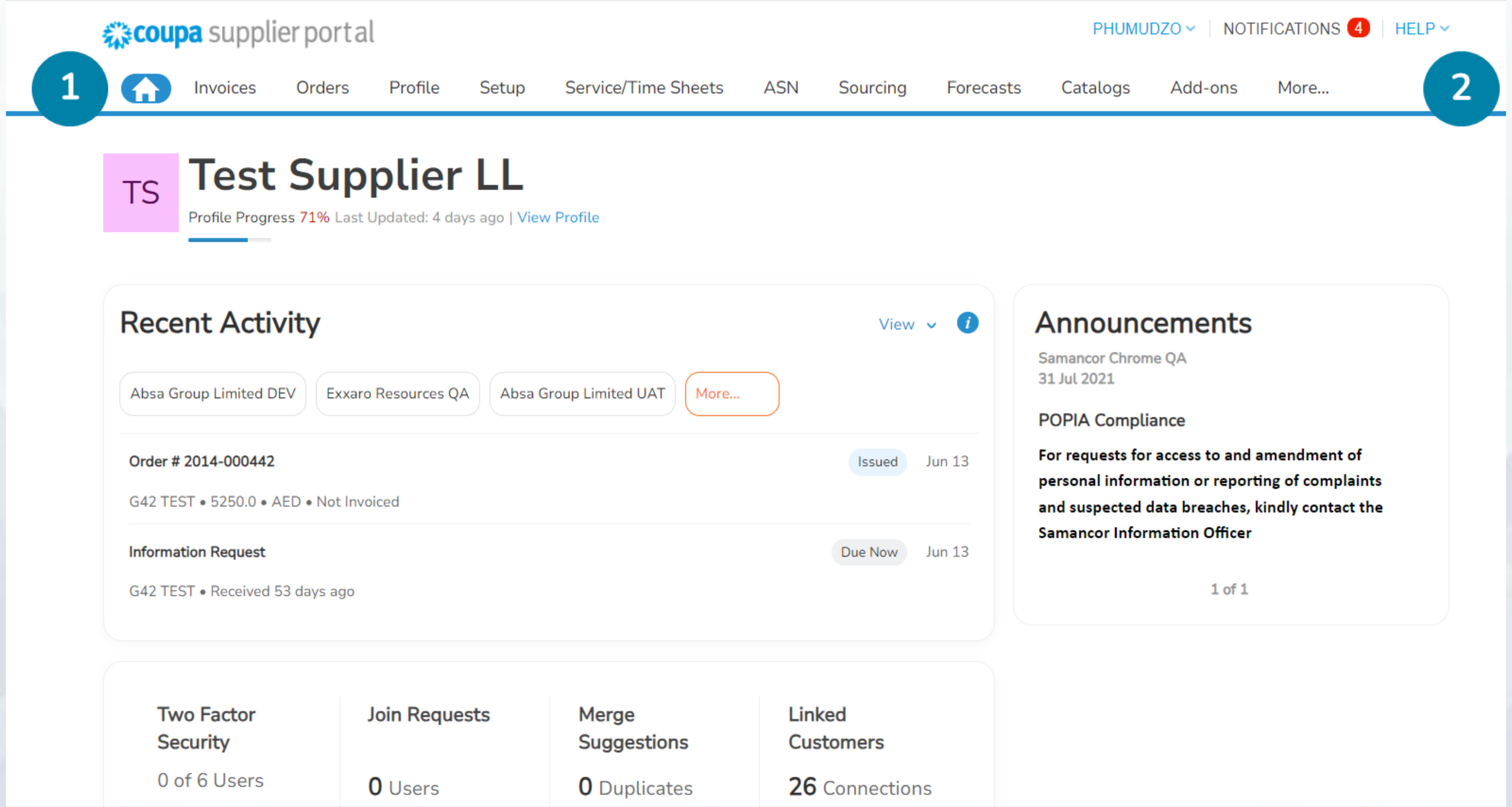
Navigation and use of the portal

In this section you will learn how to navigate and use the portal

1. At the top you will find the menu or the options available within the portal.

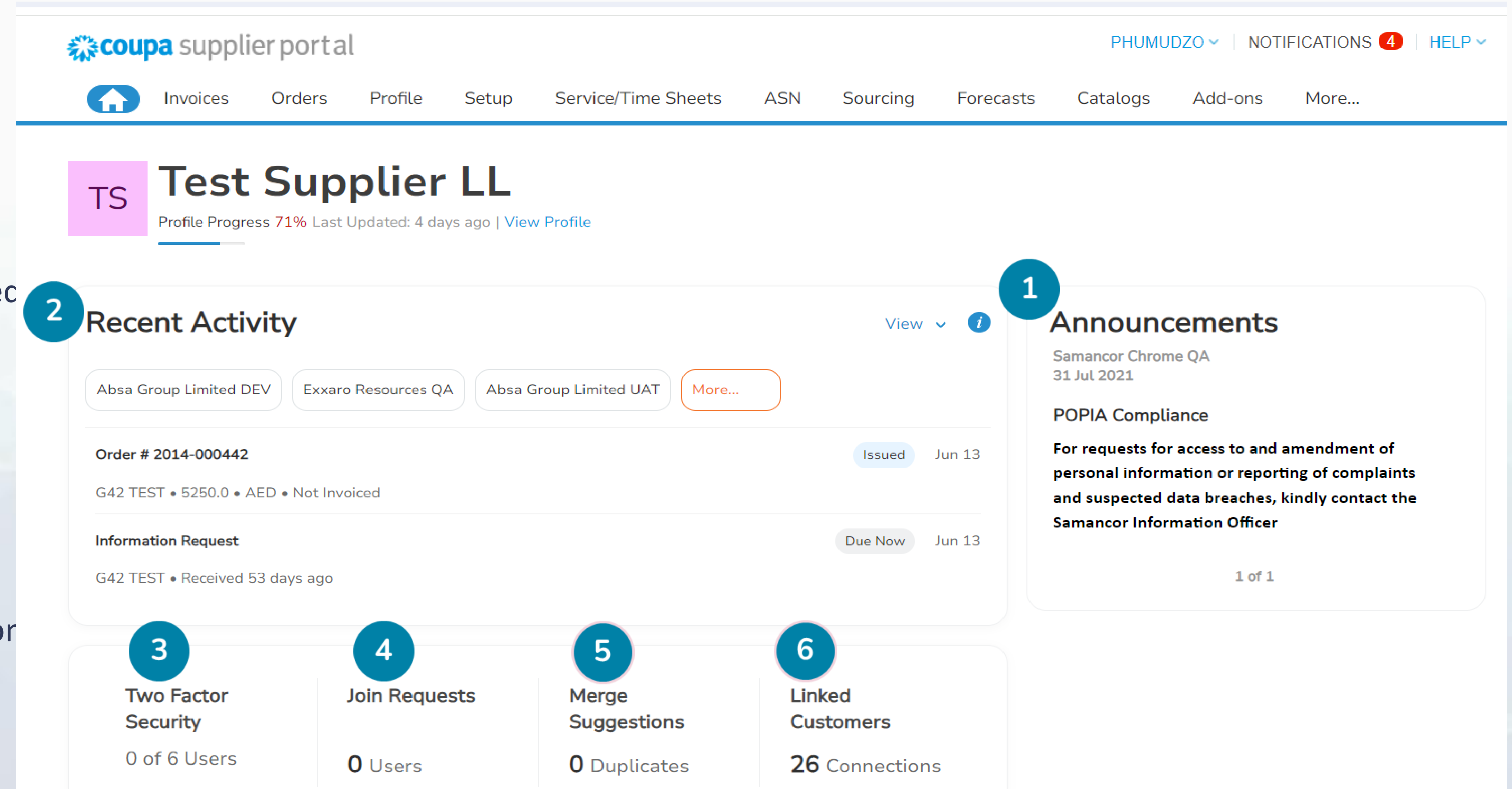
2. On the upper right-hand side is where you can manage the platform, change passwords, manage notifications and there is also a help option available.



NOTE: If you interact with more than one client in Coupa, you will find them in the recent activity section. To work with G42, select the one that refers to G42.

In this section you will learn how to navigate and use the portal

1. Announcements section where G42 will be informing about new developments.
2. Recent activity will be listed here
3. Two-factor security information will be displayed here
4. Join requests will be displayed here
5. Merge suggestions will be displayed here
6. If you interact with more than one customer on the platform, you can click here to view them.



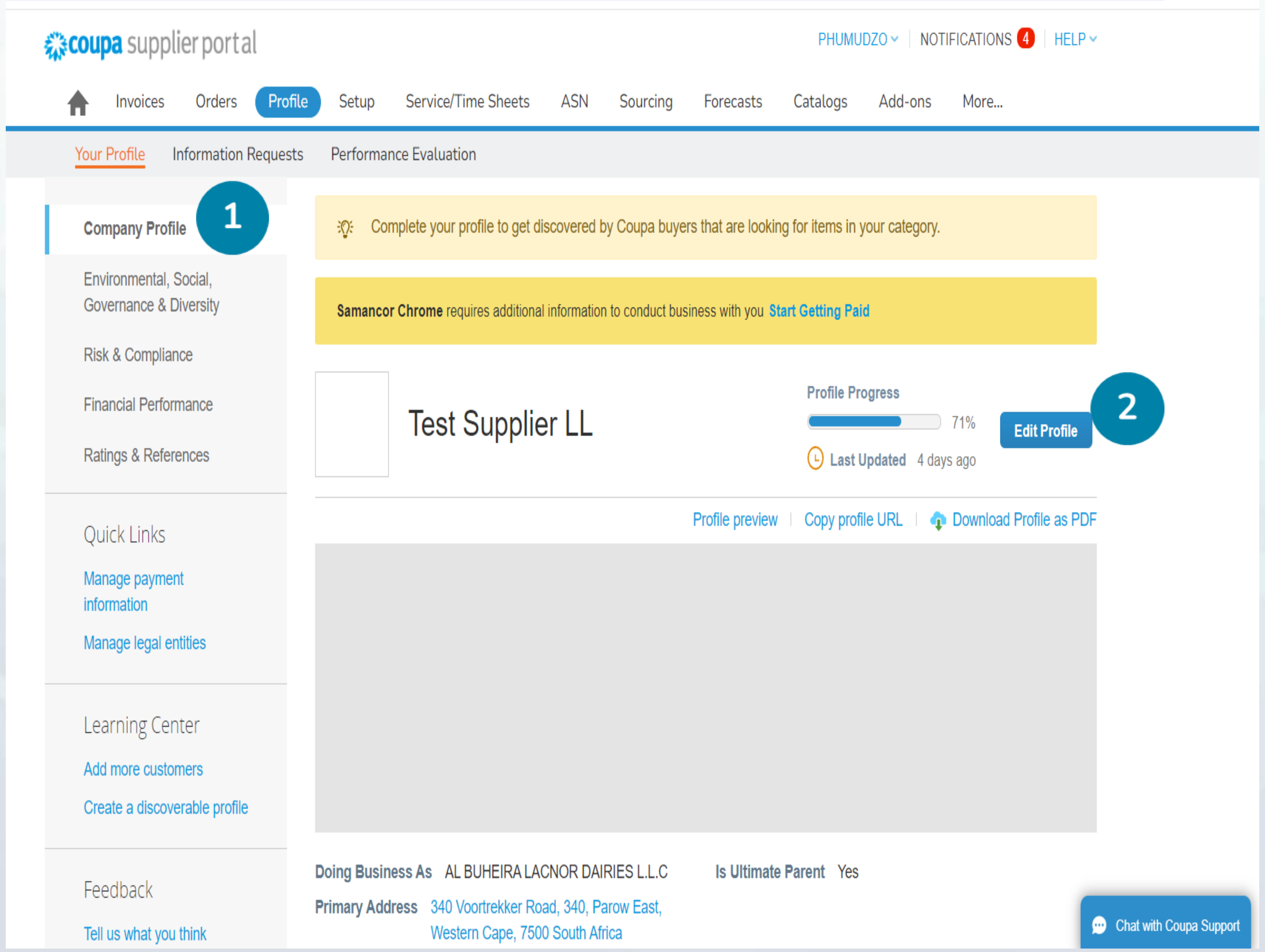
NOTE: The help option is directly with Coupa, at your disposal you will find help material as support.

This section corresponds to the company profile where you can update your company's information

1 Company Profile

2 To complete and edit the information, select the Edit Profile option at the right.

3 Additional information can be completed by clicking on the relevant sections



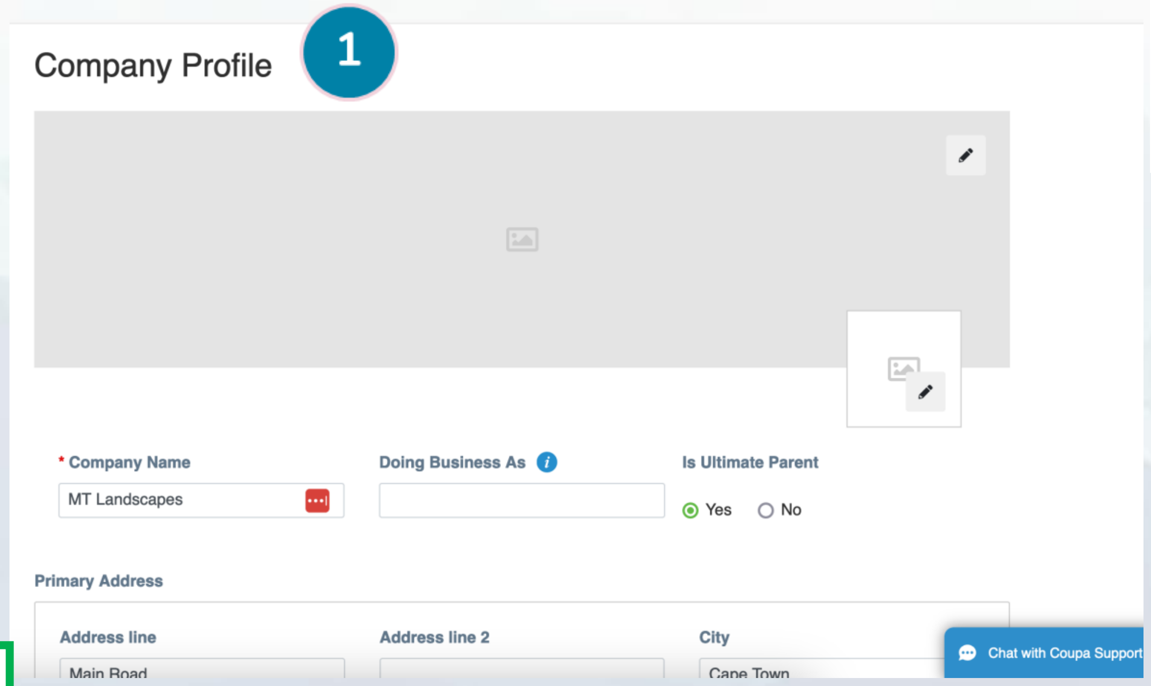
NOTE: This information refers to your profile as a company (not G42 specific), you have many options to update and complete your profile.

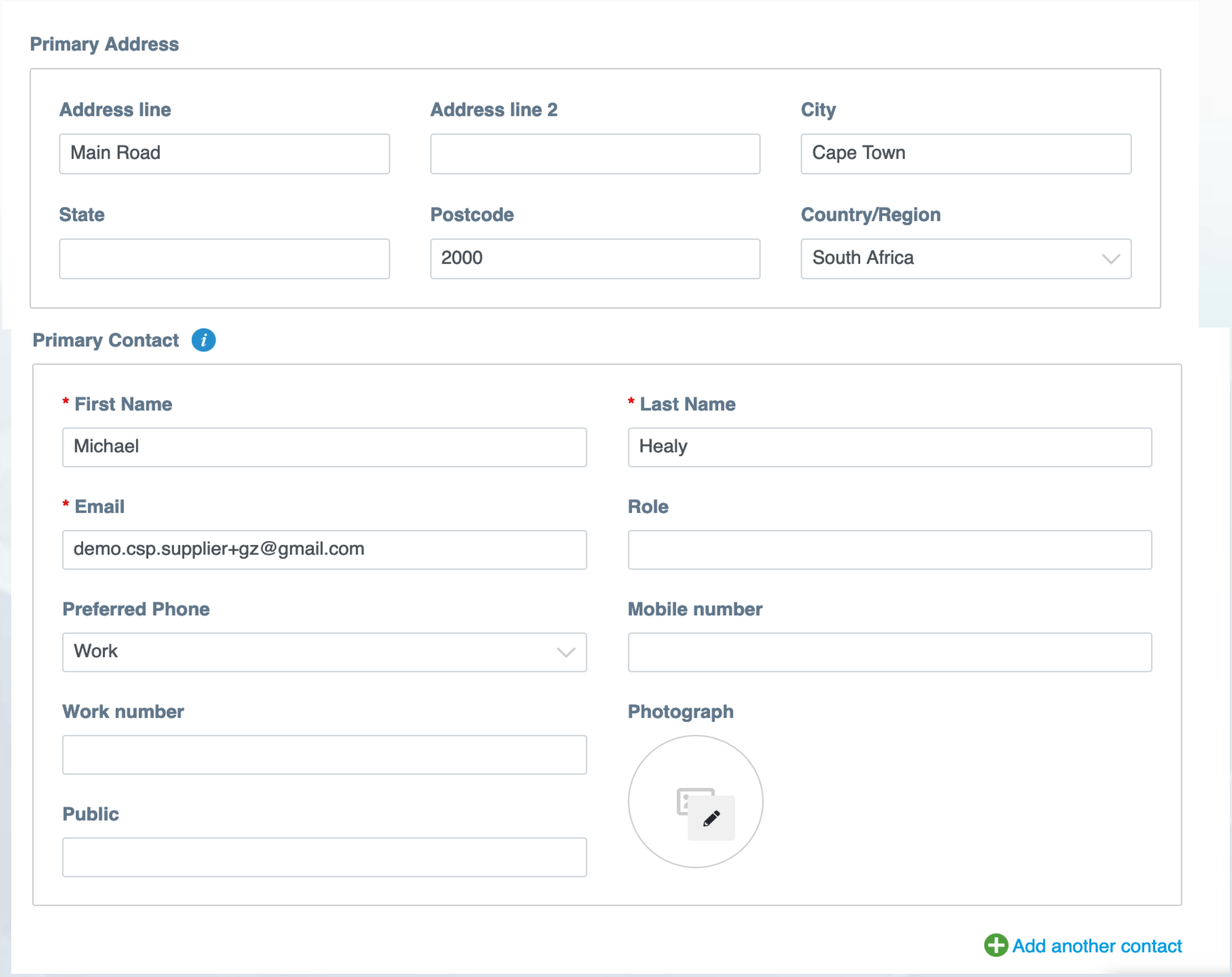
In this section you will find all the information you need to update your profile

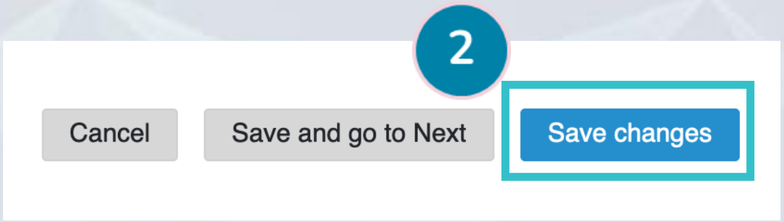
1 In the Edit Profile section, you will find general information about your company to complete.

In this section you will find company details such as address and contacts.

2 When done, click Save changes







NOTE: The fields marked with an asterisk are mandatory, the others are required to have an updated profile. The legal entity field is related to your company.

This section corresponds to all the purchase orders you have received

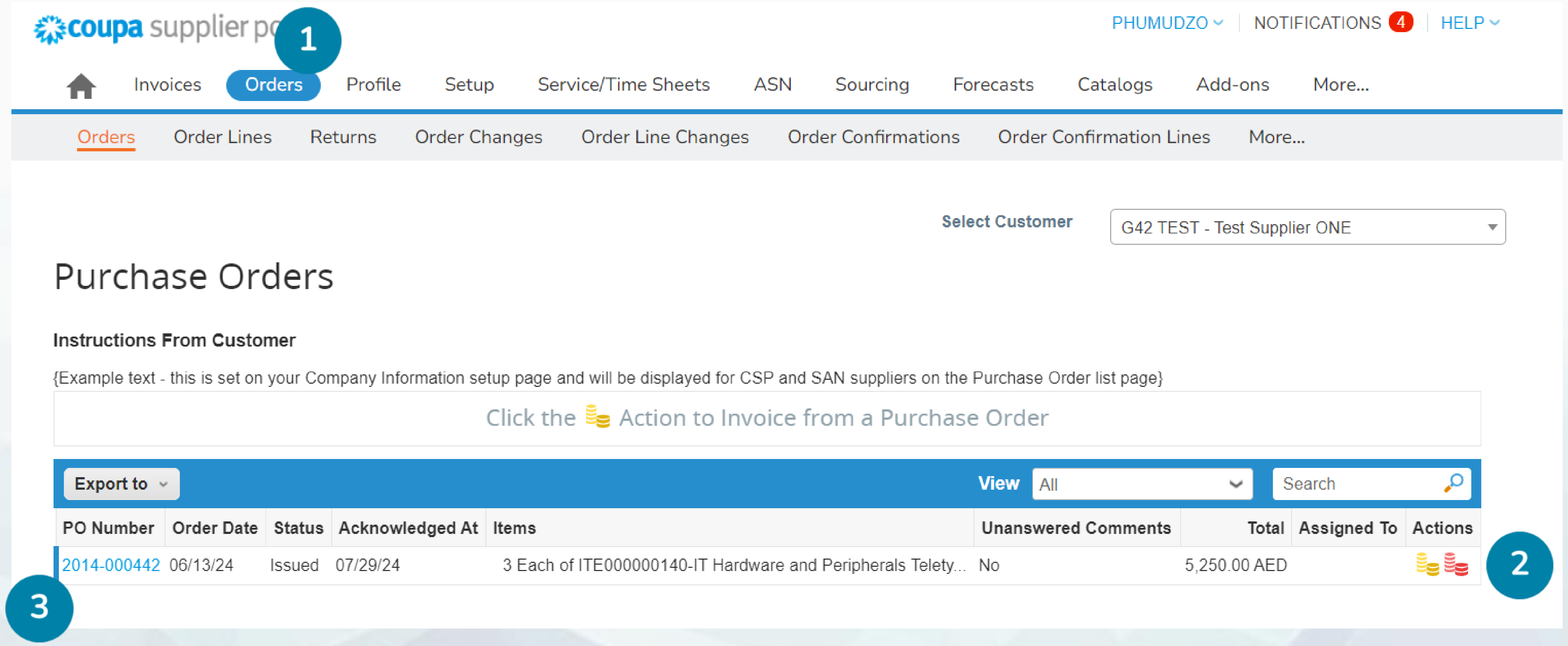
1. In the orders tab you will be able to see the history of purchase orders, the status, date and a short description.

2. Section to create invoices and credit notes

   a. The icon refers to create an invoice

   b. The icon refers to create a credit note

3. To view the details of the order, click on the order number you wish to review



NOTE: Creating a credit note directly against a purchase order is not allowed as part of the G42 design/process

In this section you can review the information contained in a purchase order

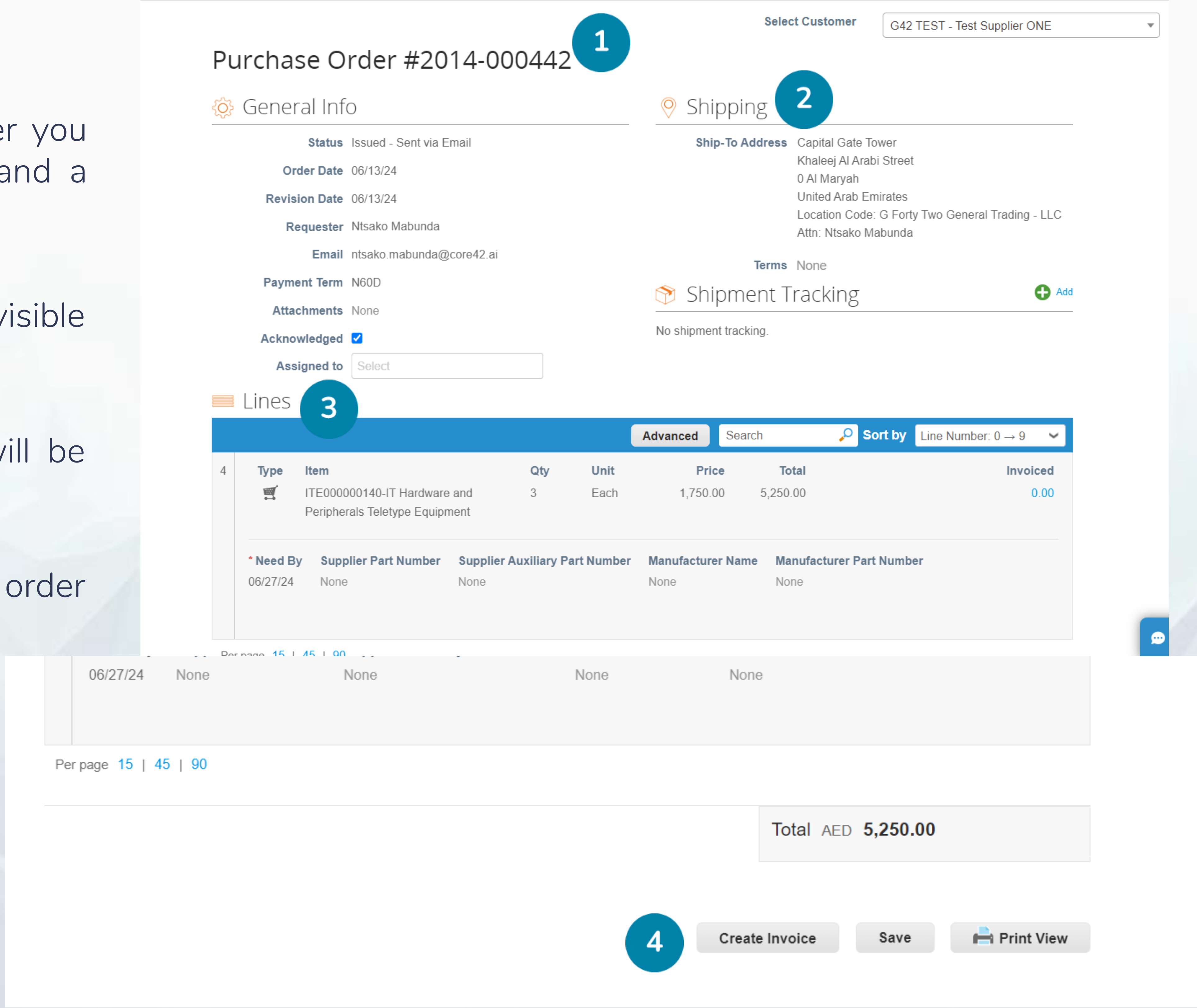
1 Once you have clicked on the Purchase Order number you wish to review, you will find the reference number and a description of the order.

2 The address associated to the purchase order will be visible under the Shipping section

3 Lines or items that are part of the purchase order will be visible under the Lines section

4 Options available to you for processing the purchase order are located below

NOTE: The acknowledged option allows you to accept the supply and/or provision of the required goods/services to G42.

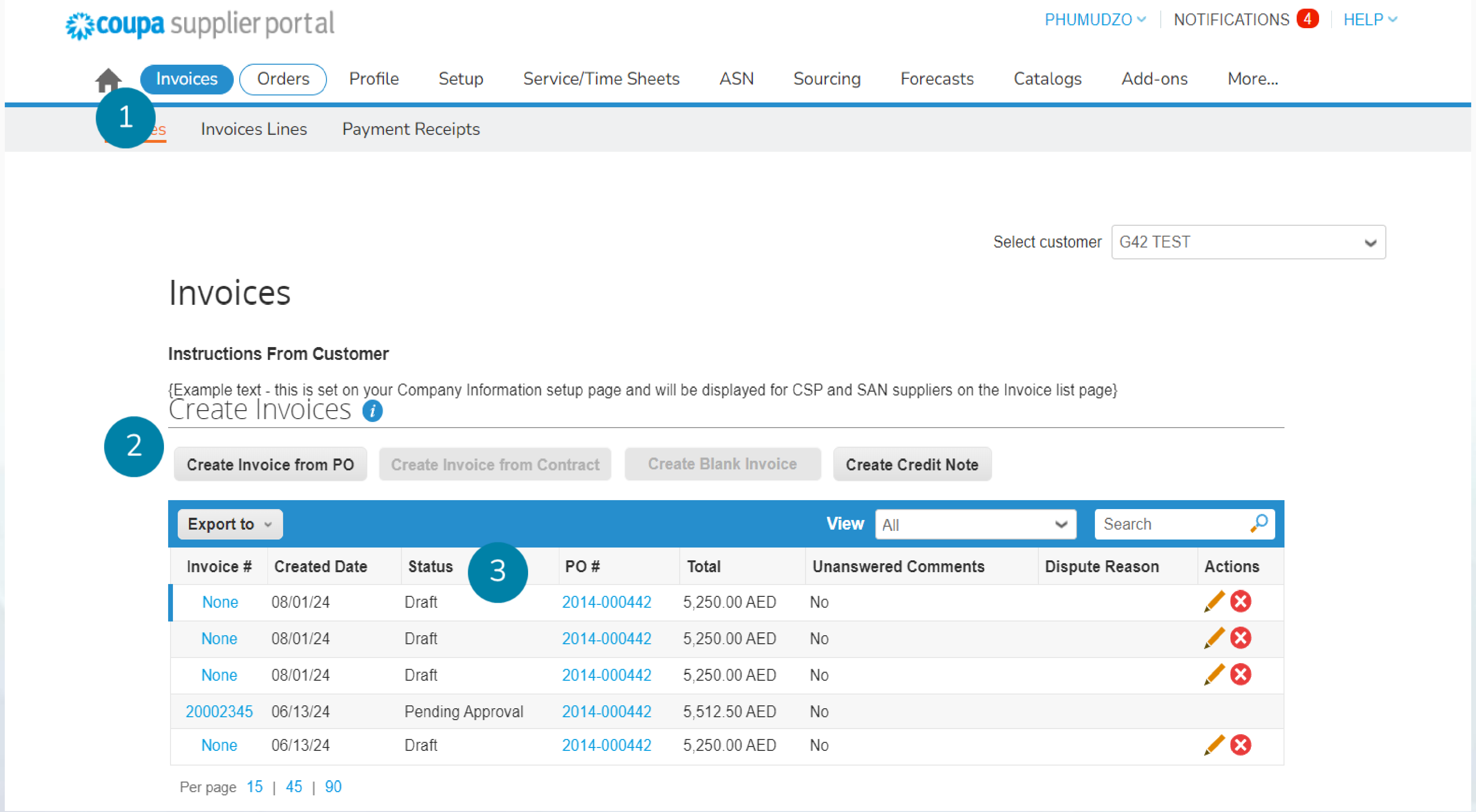


In this section you can review your invoices

1. Entering the invoices tab you will be able to visualise everything related to this.

2. Functionalities to create invoices and credit notes

3. General information of the invoices you have created. You will be able to see their status and some general information.



NOTE: 'Create Blank Invoice' and 'Create Invoice from Contract' options will only be allowed for selected suppliers.

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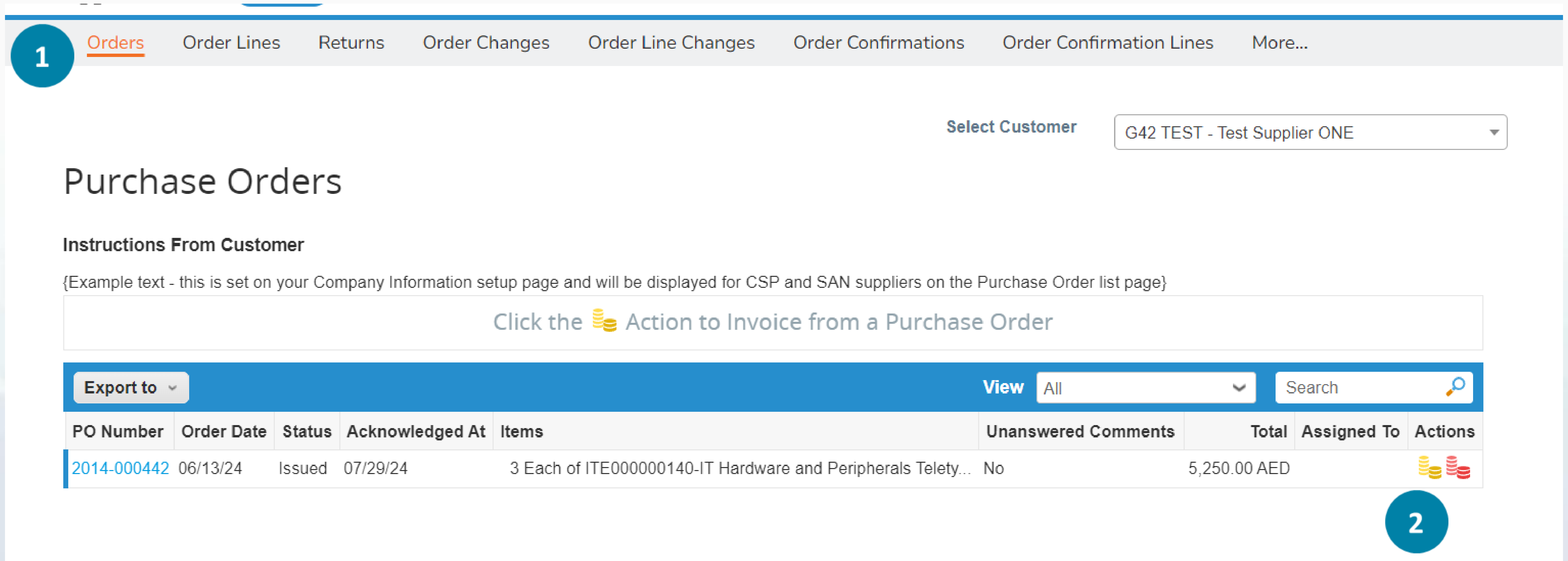
Creating an invoice from a purchase order

In this section you can create an invoice from a purchase order

1 In the purchase orders tab identify the order to create the invoice

2 For the purchase order, click on the icon



NOTE: In the orders tab you will find all the purchase history you have with G42. You cannot consolidate purchase orders to generate invoices. You must perform the the process for all orders separately

In this section the creation of the invoice will take place

1 **Complete** the information in the general information section.

In the Currency option review the currency defaulted from the PO

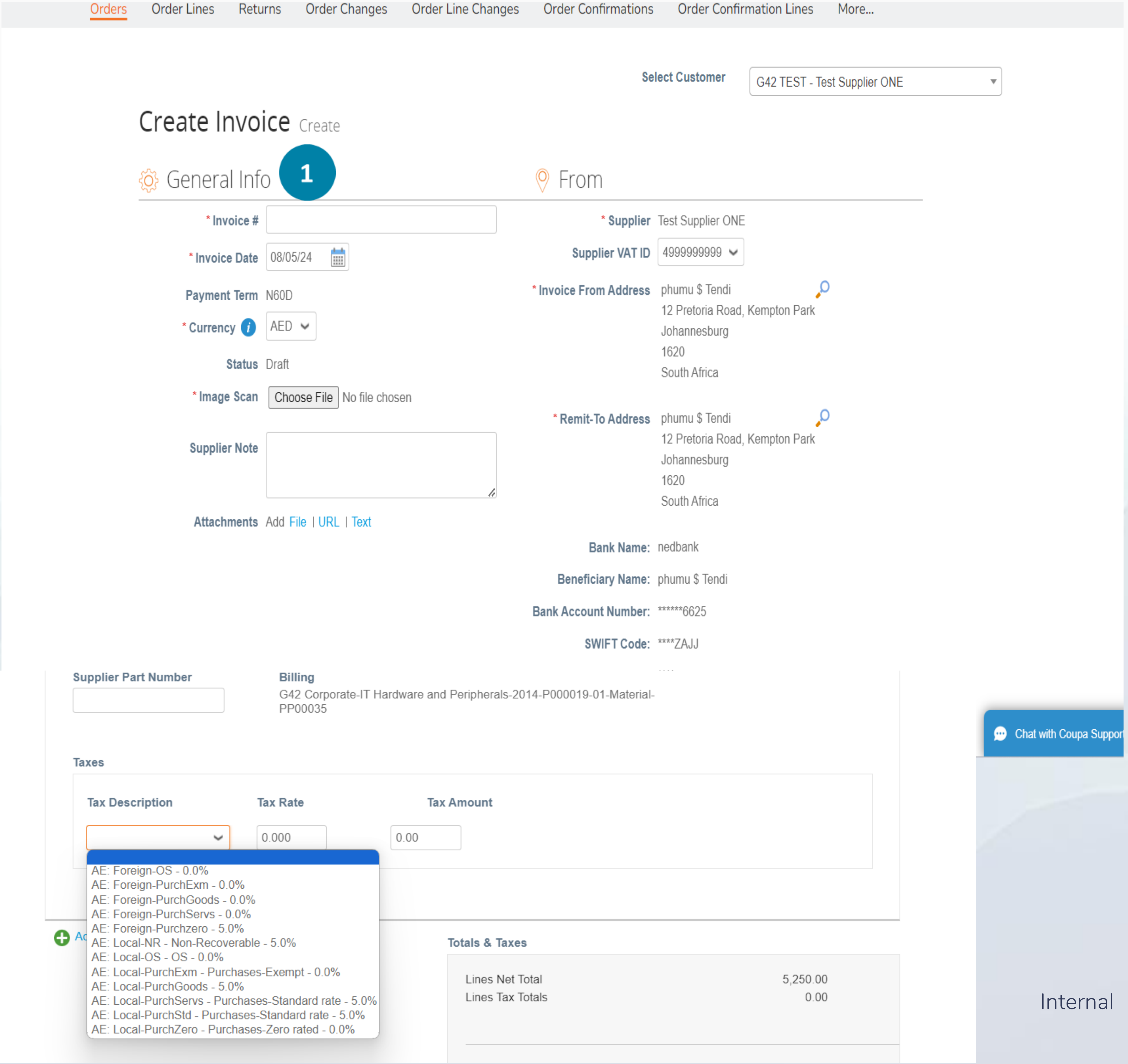
In the image scan and attachments, the graphic representation or PDF of the invoice and the dispatch or delivery fulfilment and/or service record approved by the administrator must be attached.

2 Section where you will find the lines or items associated to the invoice. Complete the information if necessary

a You have the option to create imposition at line or item level.

b Taxes can be added at the line level by clicking on the Line Level Taxation

> ***NOTE:*** It is required to create and setup a legal entity before submitting the first invoice



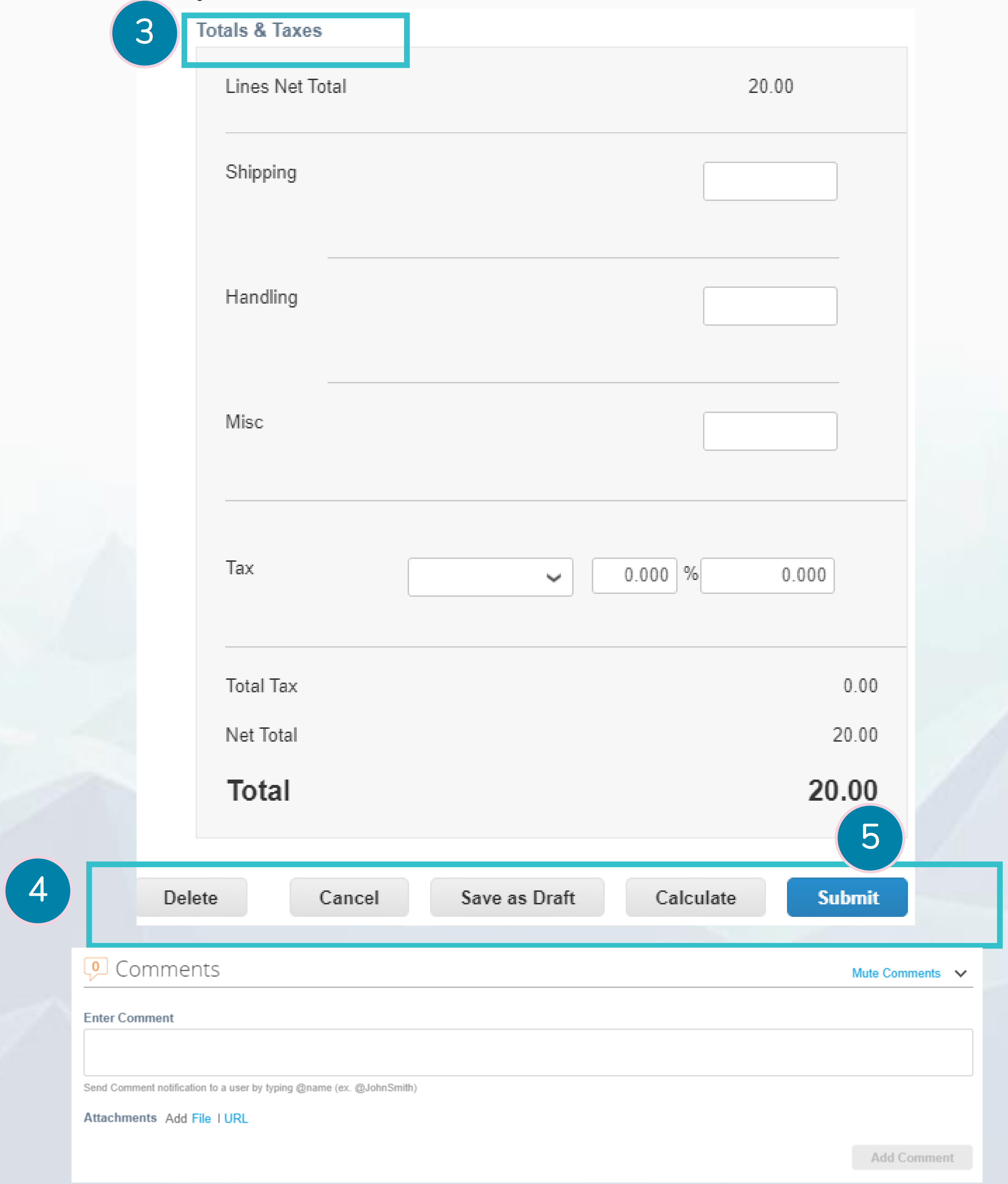
In this section the creation of the invoice will take place

3 Section where you can add the sales tax associated to the invoice.

4 Options available for invoice management

- a **Delete:** delete the invoice, you will have to do the whole management again.
- b **Cancel:** Cancels the creation of the invoice
- c **Save as draft:** You will be able to save the invoice and continue editing it later.
- d **Calculate:** The invoice total is updated, including tax added

5 Click on submit. The invoice has been sent to G42.



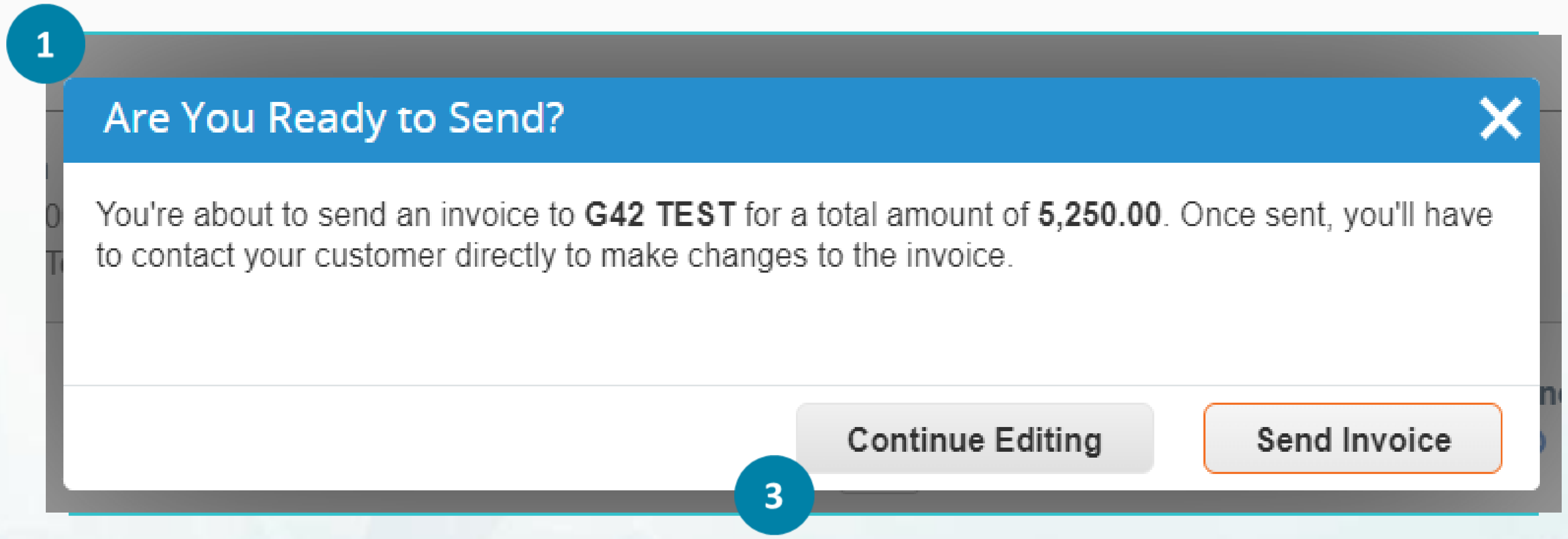
Notifications when sending an invoice

1. A notification box will appear each time you send an invoice, it refers to the confirmation of the information provided.

2. In case you do not attach an image scan and try to send an invoice a notification box will appear referring to the missing document.

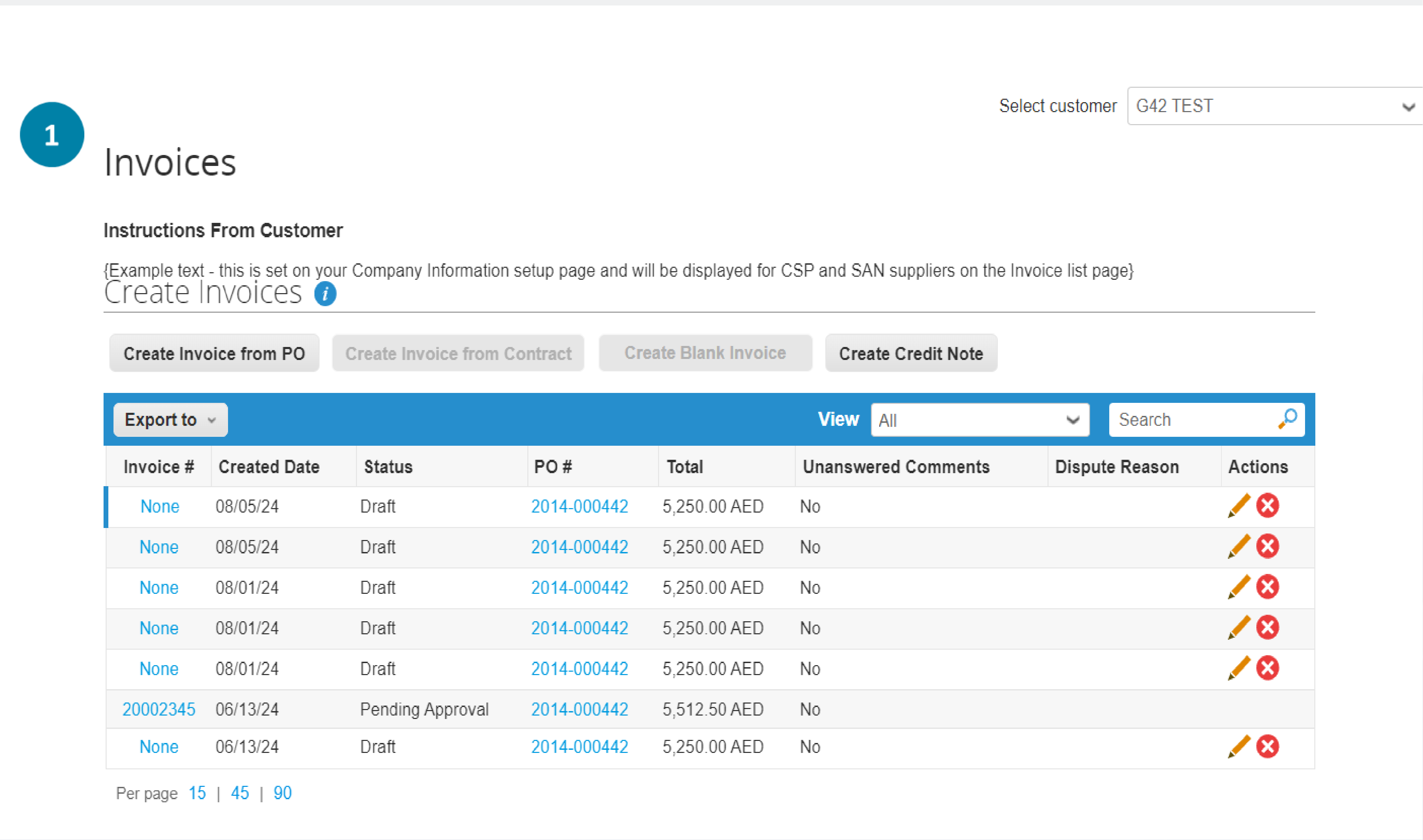
3. Click continue editing to return to the invoice and complete the missing information.

NOTE: In case the information is incomplete the platform will not show this notification.



In this section you will see the status of the invoice once you have sent it

1 In the invoices tab, you will find the status of the invoice. You will be able to track the status of the invoice. What statuses can you view?



Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	08/05/24	Draft	2014-000442	5,250.00 AED	No		
None	08/05/24	Draft	2014-000442	5,250.00 AED	No		
None	08/01/24	Draft	2014-000442	5,250.00 AED	No		
None	08/01/24	Draft	2014-000442	5,250.00 AED	No		
None	08/01/24	Draft	2014-000442	5,250.00 AED	No		
20002345	06/13/24	Pending Approval	2014-000442	5,512.50 AED	No		
None	06/13/24	Draft	2014-000442	5,250.00 AED	No		

INVOICE TAB OVERVIEW

Invoice Status	Description
Approved	The invoice has been accepted for payment by G42 and payment will be made in line with the payment terms of the PO.
Disputed	The invoice has been disputed. G42 must give a reason for the dispute and leave additional comments for you while the invoice is in disputed status. To resolve the dispute, you need to review and correct the mistakes in the invoice and resubmit it (see next slide).
Draft	A draft invoice has been created against a specific PO, but it has not been submitted to G42. These invoices can be edited and submitted at anytime.
Pending Approval	The invoice is being processed and is either pending the receipt of the goods/service, or a tolerance was exceeded and requires someone at G42 to approve the change. Examples of tolerances include additional shipping/handling/misc. fees being added to the invoice, price discrepancies, QTY discrepancies, etc.
Voided	The invoice has been voided. Typically, this will only happen after G42 has communicated the issue to the Supplier. In most cases, the invoice will be Disputed and not Voided. **IMPORTANT: An invoice that is voided CANNOT be resubmitted.**

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Creating a credit note

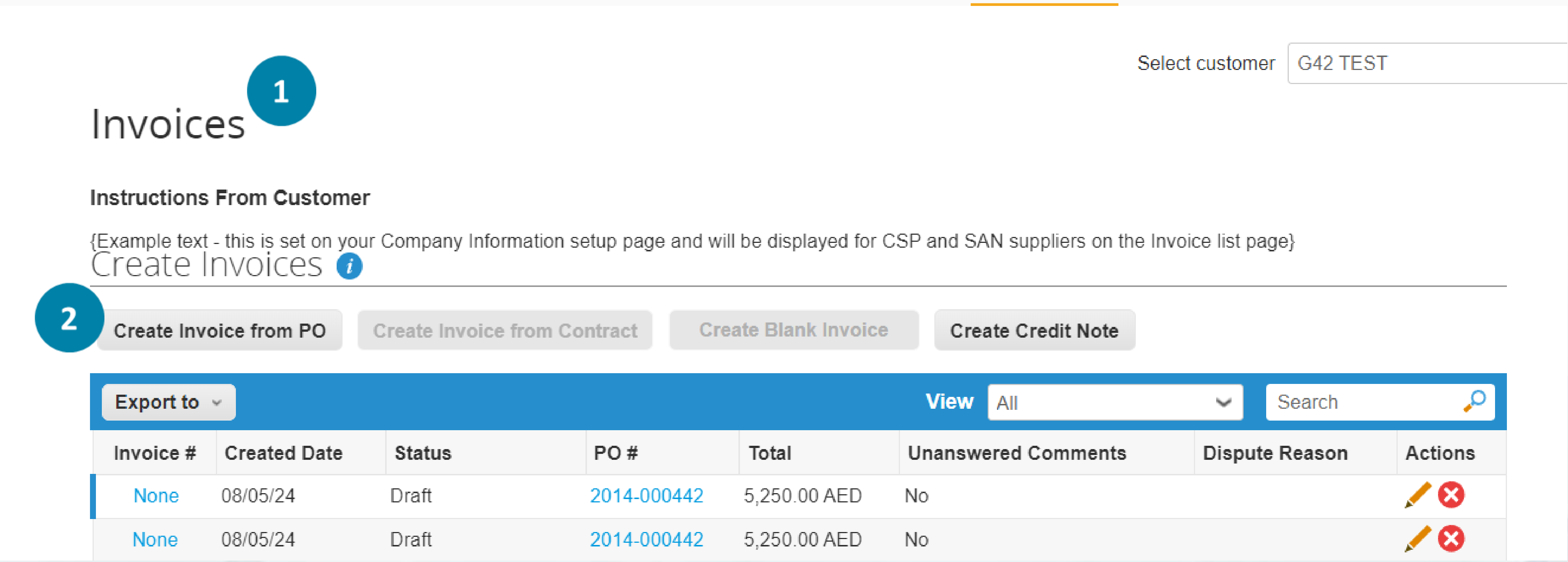
Create a credit note

In this section you will learn how to create a credit note through the supplier portal

1. In the invoice tab you can view invoice previously created and create credit notes

2. In the create invoices section click create Credit Note

   a credit note should not be created directly against a purchase order



NOTE: In the invoices tab you will find all the history you have with G42.

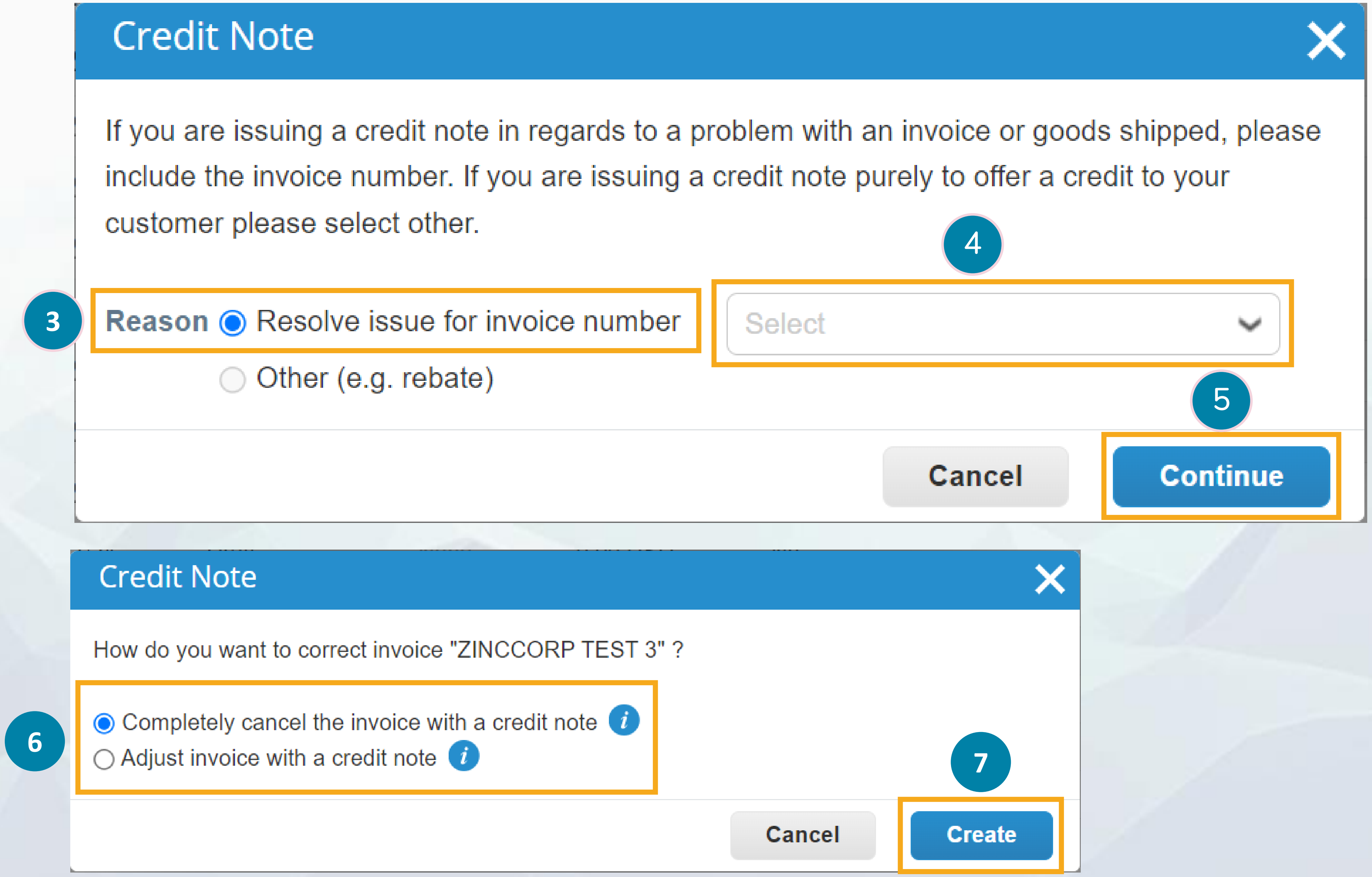
In this section you will learn how to create a credit note through the supplier portal

3 The credit note reason will be defaulted to resolve issue for invoice number

4 Select the invoice number that you want to create a credit note for

5 Choose the option to either completely cancel the invoice with credit note or to adjust the invoice with credit note

6 Click create to create the credit note



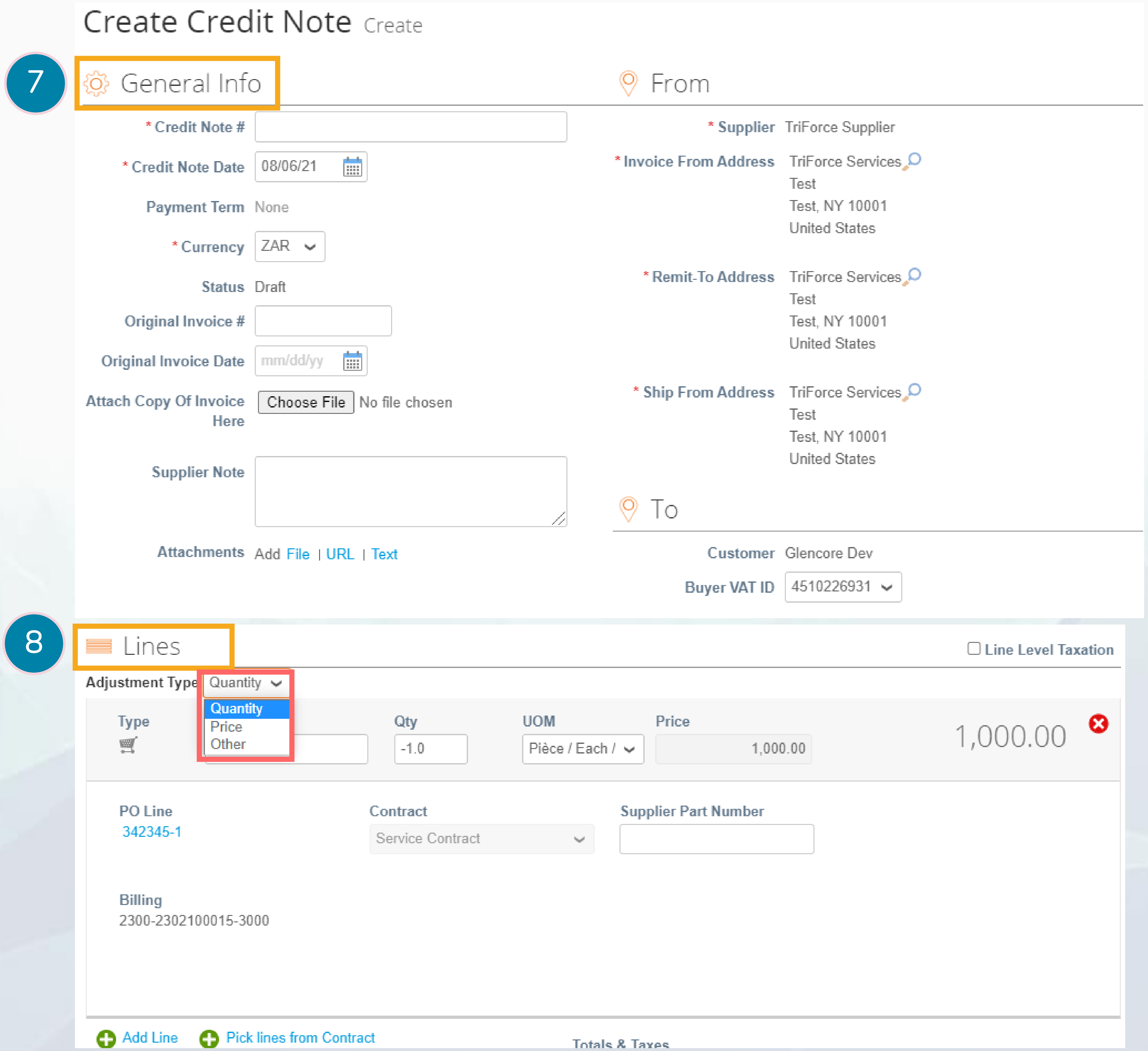
Create a credit note

In this section you will learn how to create a credit note through the supplier portal

7 In the general info section, populate the general info of the credit note such as the credit note #, credit note date and attach a copy of the invoice

8 In the line section, select the type of adjustment you wish to make.

- **a** Quantity: Only allows changes related to the quantity of the purchase order.
- **b** Price: Only allows changes related to price adjustments. Must be negative (-)
- **c** Other: This change allows for price and quantity changes.

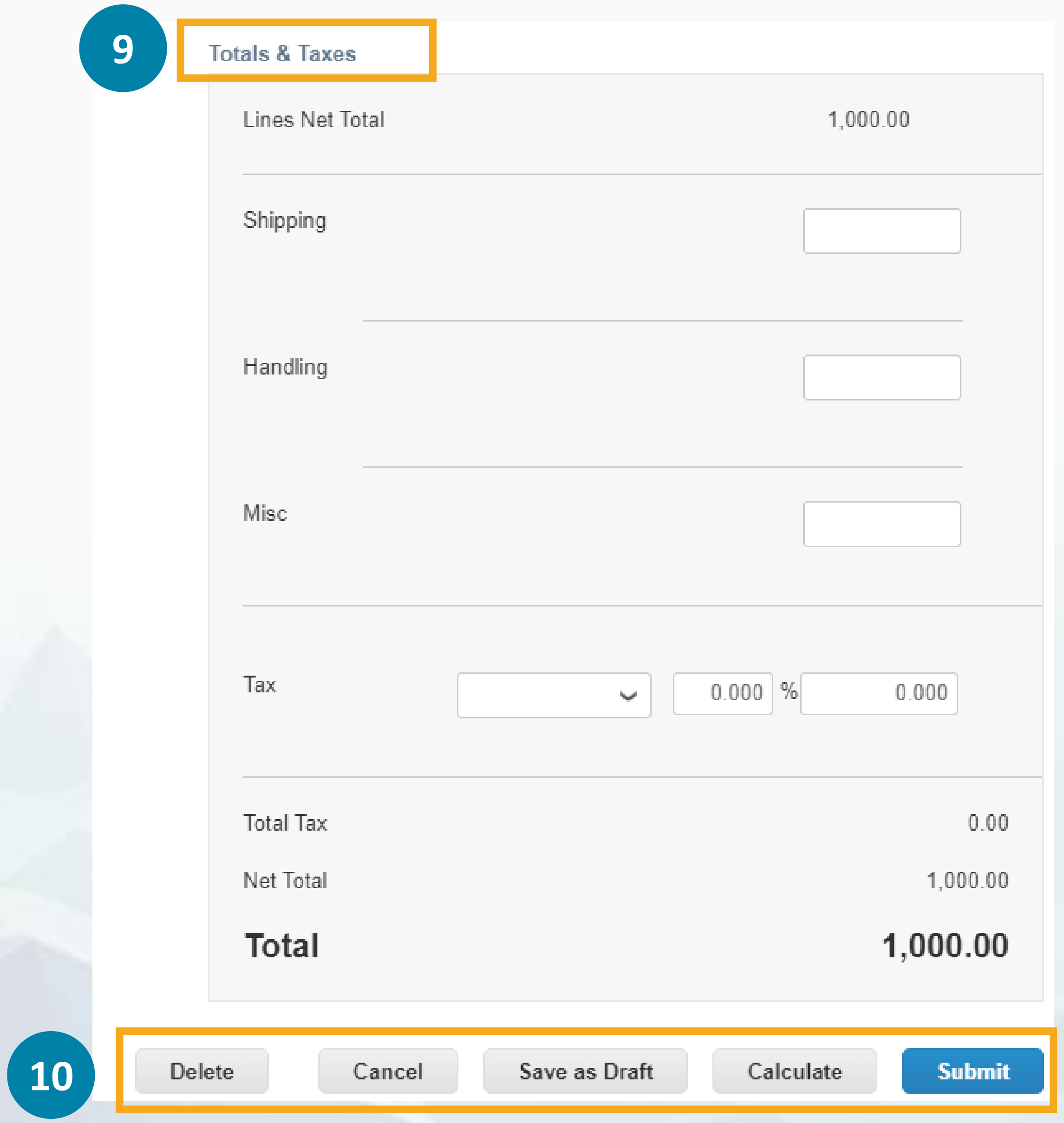


In this section you will learn how to create a credit note through the supplier portal

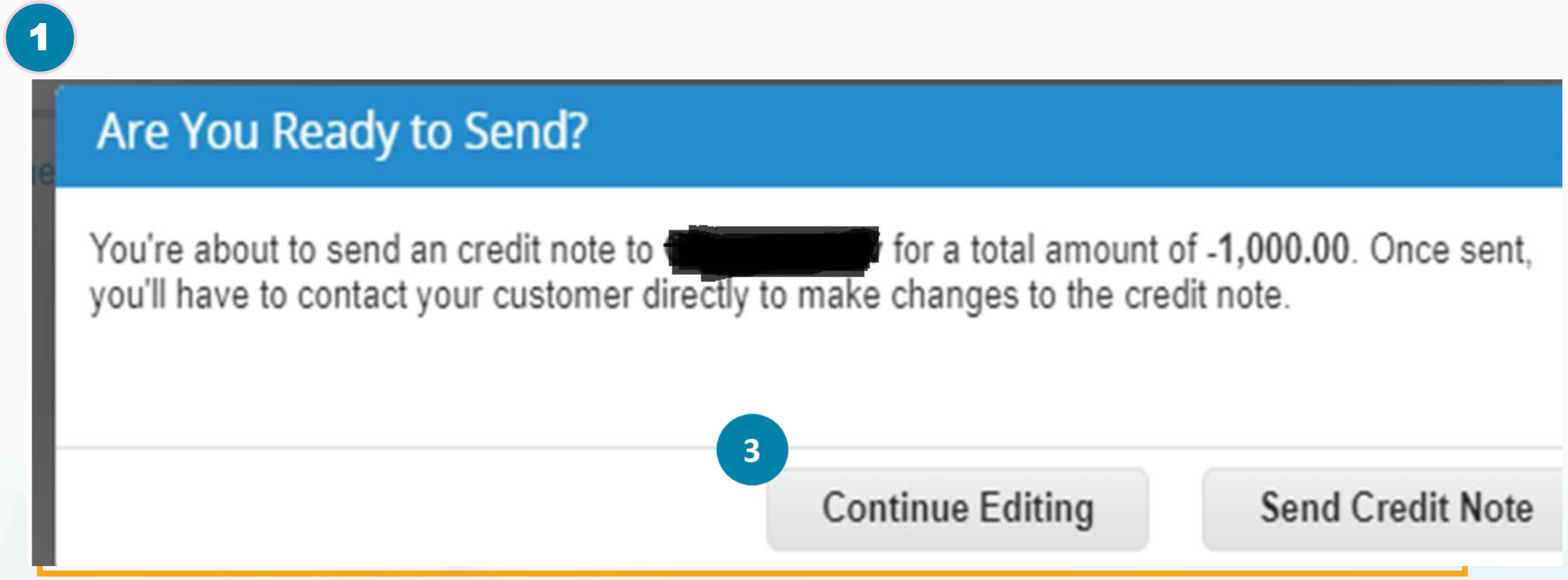
9 Section where you can add sales taxes (should default from original invoice)

10 Available options for credit note management

- **a** **Delete:** delete the invoice, you will have to do the whole management again.
- **b** **Cancel:** Cancels the creation of the invoice
- **c** **Save as draft:** You will be able to save the invoice and continue editing it later.
- **d** **Calculate:** The invoice total is updated, including tax added



In this section you will learn how to create a credit note through the supplier portal



1. A notification box will appear each time you send a credit note, it refers to the confirmation of the information provided.

2. In case you do not attach a file and try to send a credit note a notification box will appear referring to the missing document.

3. Click continue edit to return to the invoice and complete the missing information.

NOTE: In case the information is incomplete the platform will not show this notification.

In this section you will view the credit note status

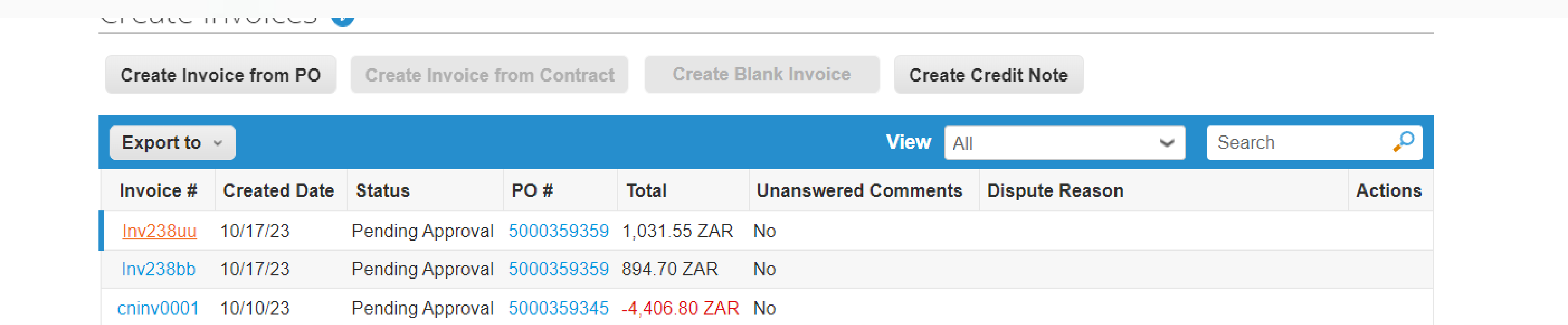
1 In the invoice tab, you will find the status of the credit notes you have created. You will be able to track their status. Which statuses can be displayed

a **Approved:** The credit note has been approved

b **Pending Approval:** The credit note is pending approval by G42.

c **Draft:** Refers to a credit note that is being managed but has not yet been sent.

1

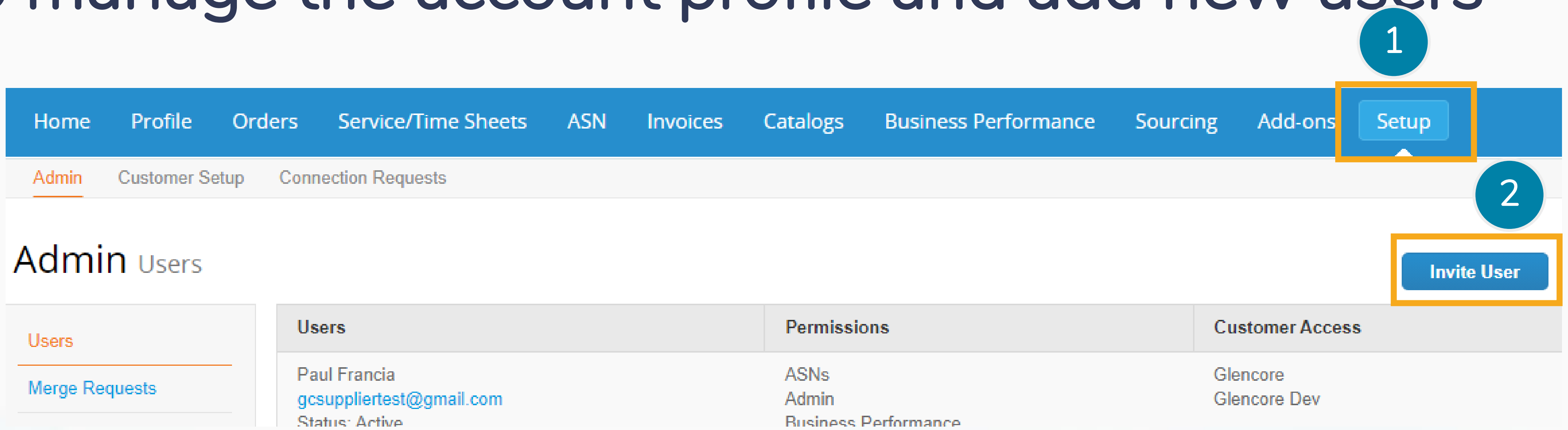


Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Inv238uu	10/17/23	Pending Approval	5000359359	1,031.55 ZAR	No		
Inv238bb	10/17/23	Pending Approval	5000359359	894.70 ZAR	No		
cninv0001	10/10/23	Pending Approval	5000359345	-4,406.80 ZAR	No		

Coupa training

Administrator tab and notifications setting

In this section you will learn how to manage the account profile and add new users to the supplier portal

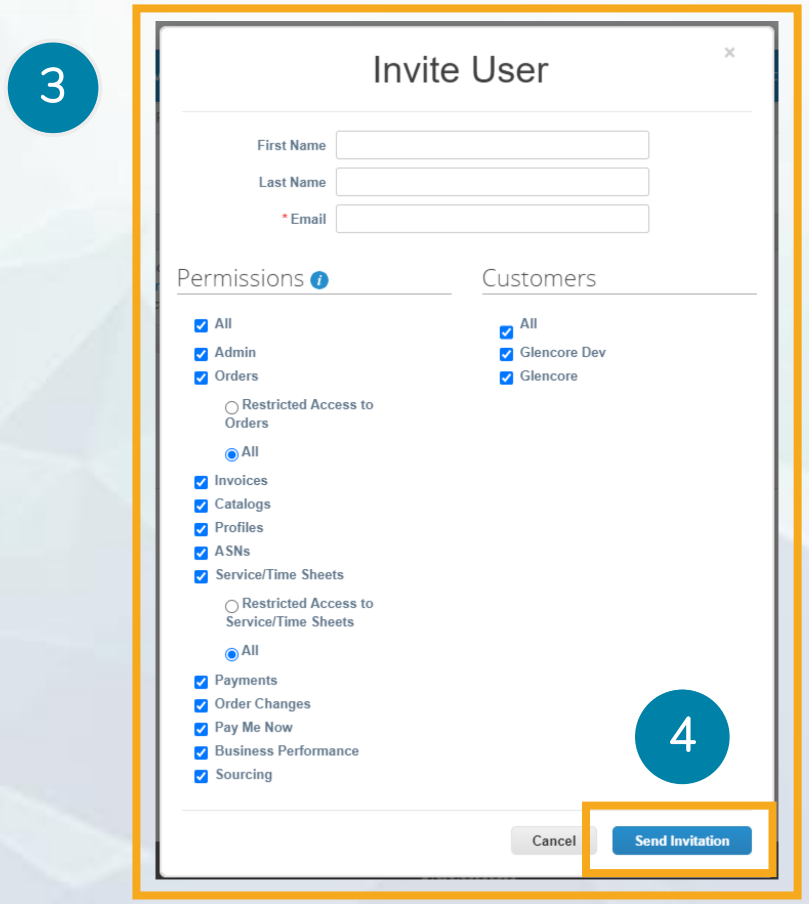


1 Go to the administrator tab on the right side of the portal.

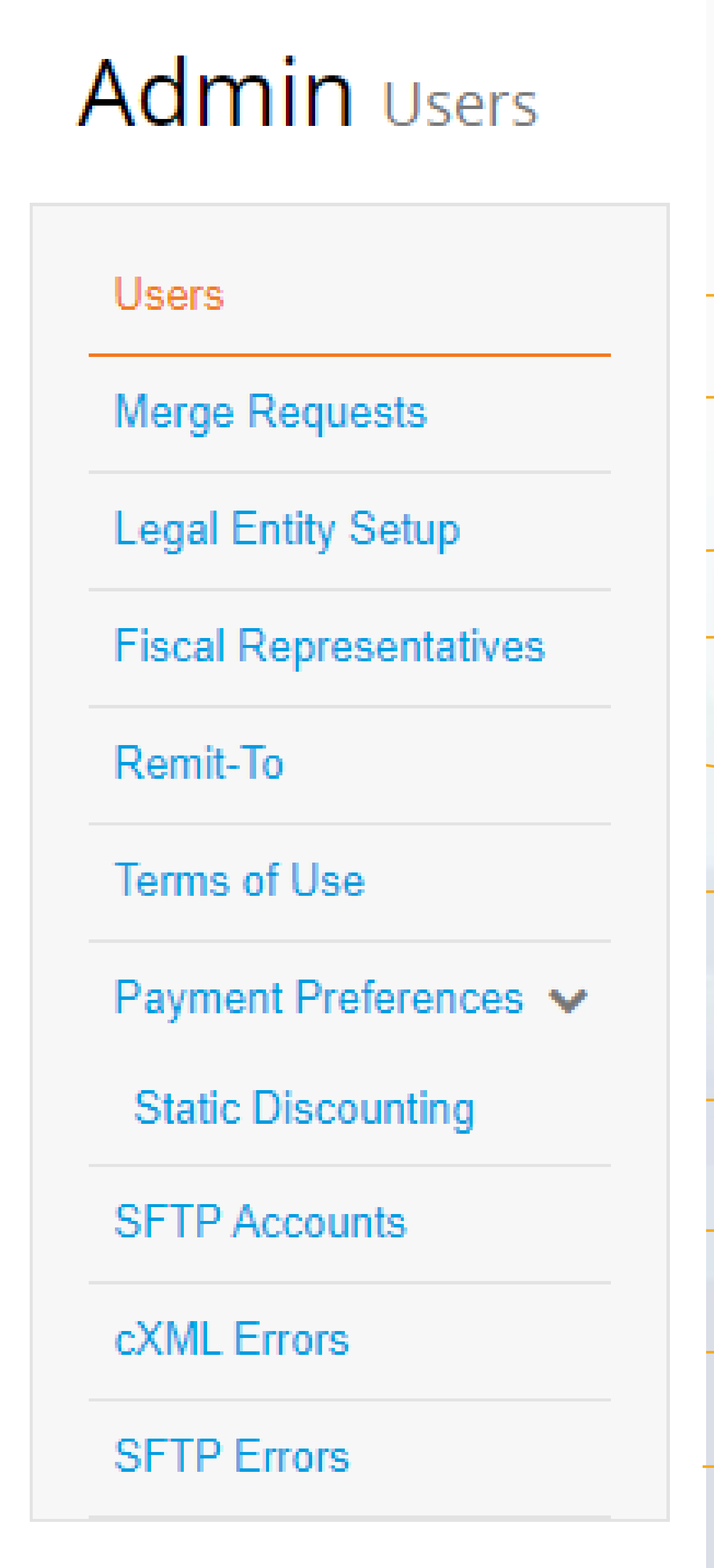
2 Click on invite user

3 Fill in the required data and select the permissions that will be enabled for the user you are adding.

4 Click on send the invitation and the user will be notified



The portal contains many features that may not be enabled for your use. The following is a short description of the administrator tab



Administration of platform users. You will be able to invite new company users

Merge accounts and manage merge requests.

Set up your account to create electronic invoices by adding legal entities / shipping addresses.

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

Provide the shipping address and associated tax information to meet compliance regulations when invoicing.

View and sign the terms of use for working with the Coupa portal.

Option not available

Option not available

Option not available

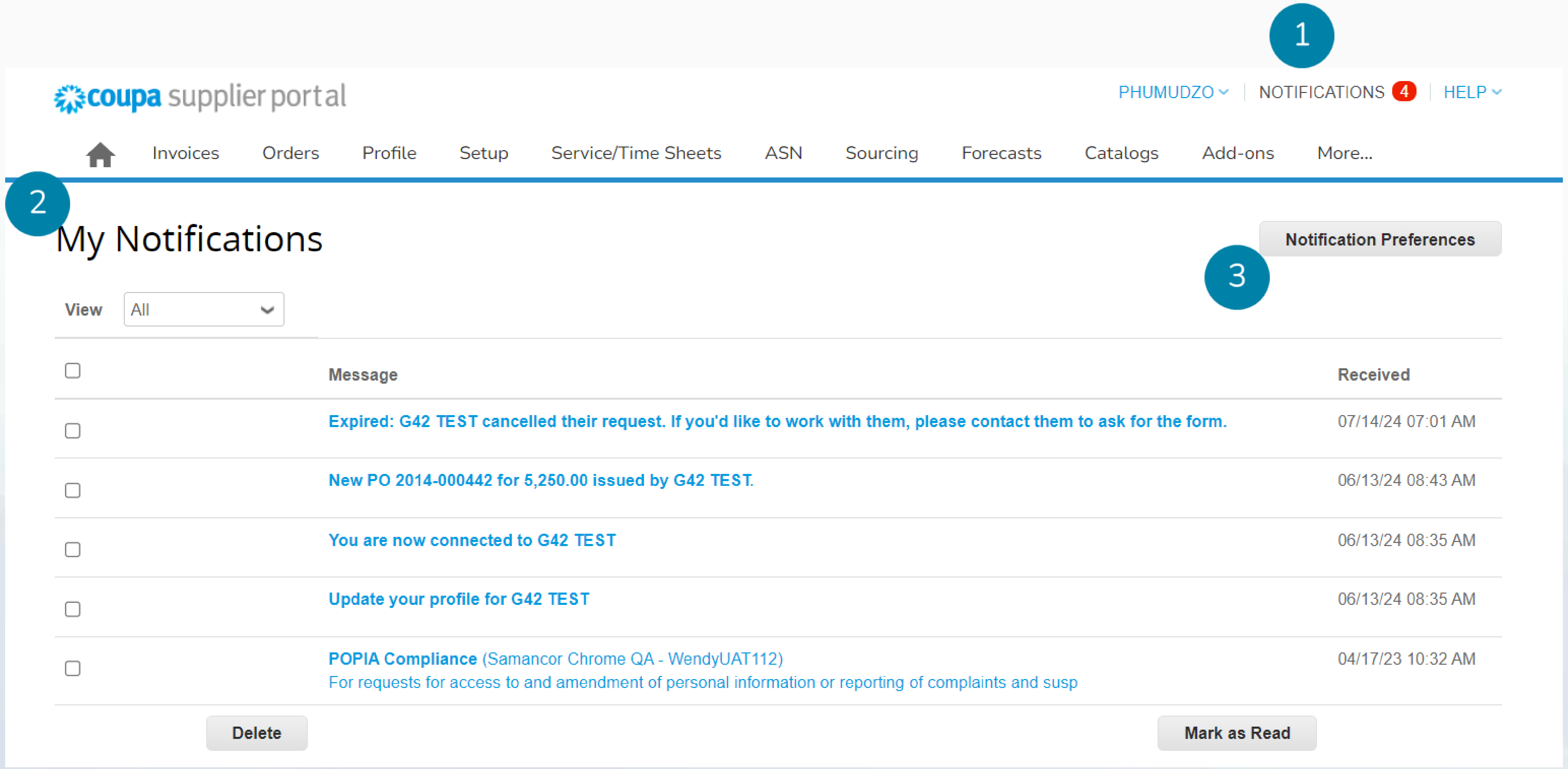
Option not available

Coupa training

Manage notifications

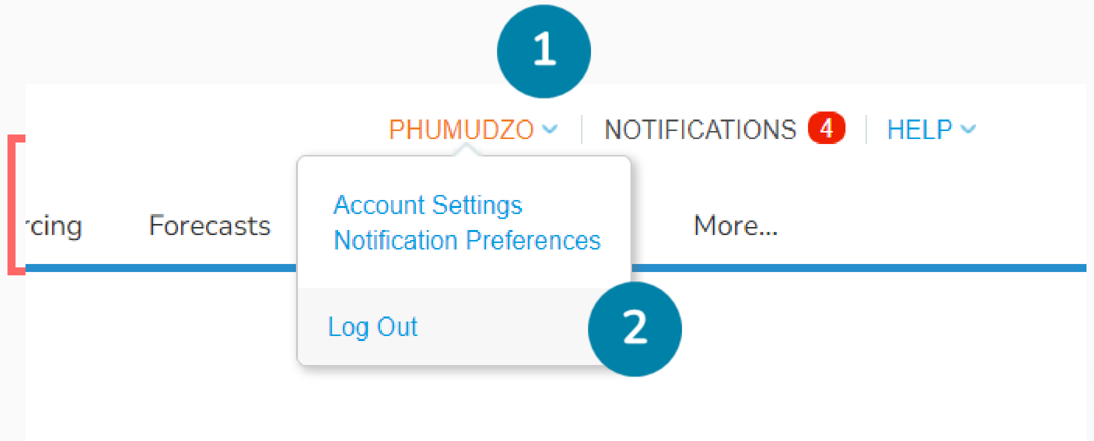
In this section you will learn how to manage notifications from the supplier portal. You will be able to set it to receive notifications to your e-mail address

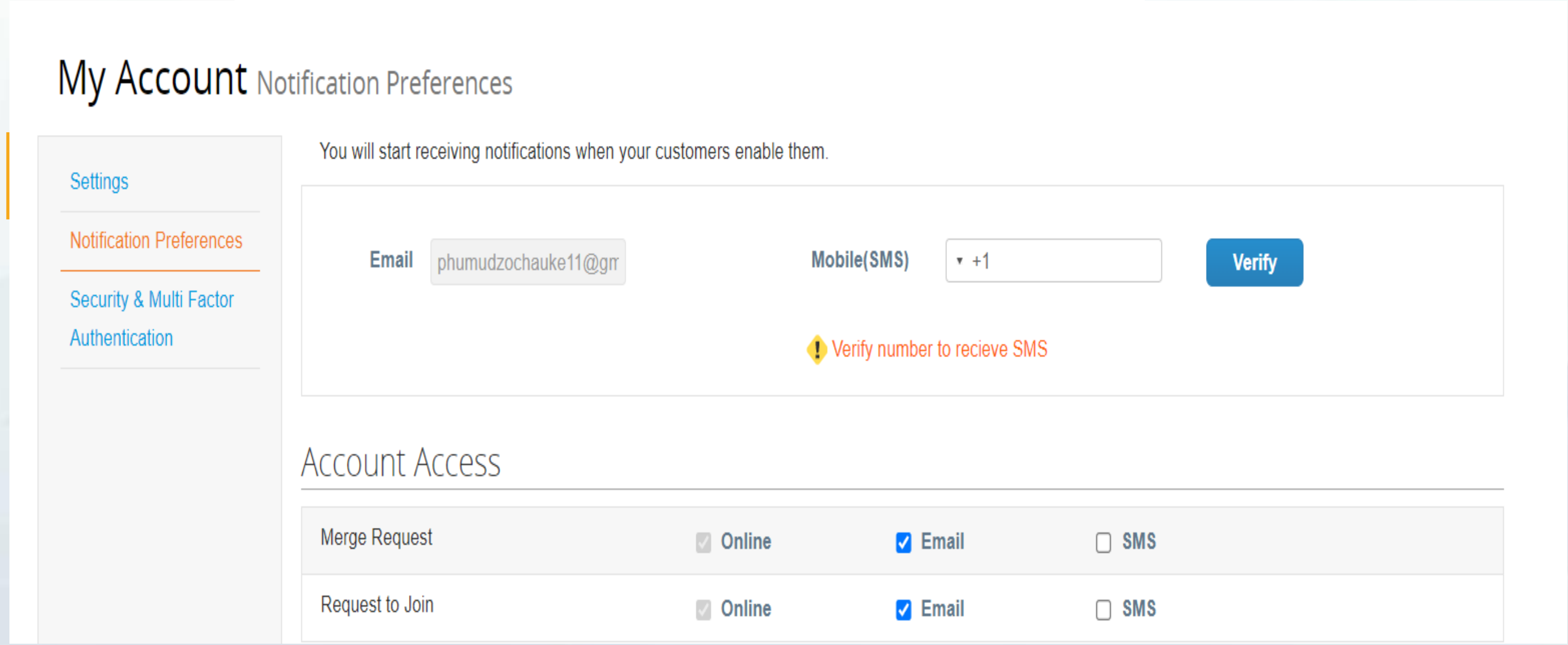
1. Go to the notifications section on the top right-hand side.
2. You will find all the notifications that you have as a supplier, you can configure it to be sent to your email as well.
3. Click on notification preferences to manage notifications. You will be able to set them to be sent to your email address

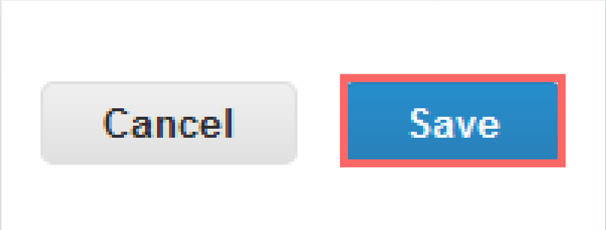


In this section you will learn how to manage notifications from the supplier portal. You will be able to set it to receive notifications to your e-mail address

1. 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. In the drop-down list you can manage the notifications according to your interests
   - a. Check the online option if you want receive online notifications. It is recommended that you always have this option activate.
   - b. Check the e-mail option if you want notifications to be sent to your e-mail address.
   - c. Scroll to the bottom of the page and click Save to save your changes.







Coupa training

10. Sourcing events

11. Supplier Onboarding

12. Additional support

Coupa training

Sourcing events (RFQ, RFP)

Respond to an invitation for a quotation or bidding event

Throughout this section, you will learn how you will receive an invitation to participate in an event

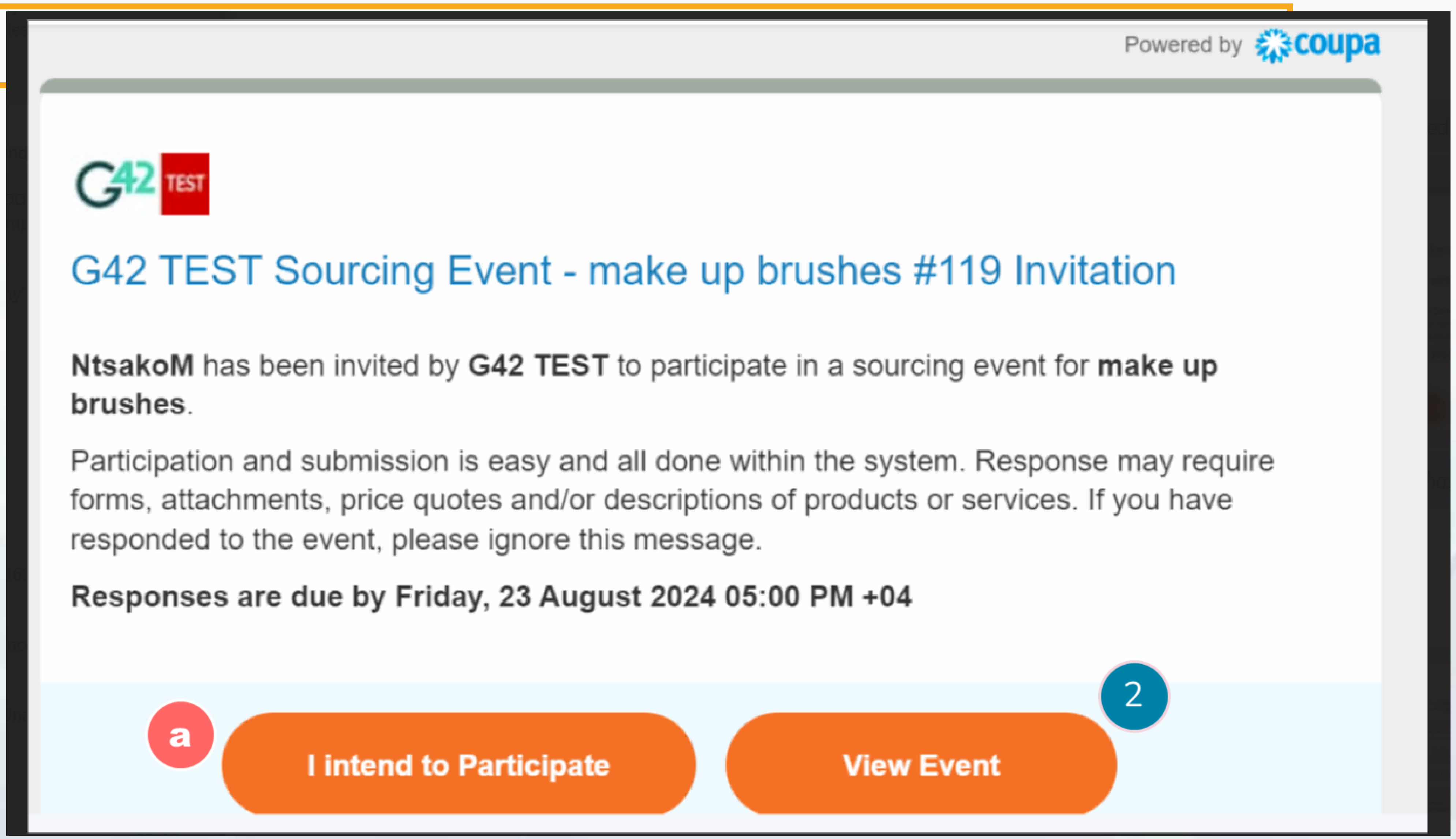
1. You will receive an invitation from G42 to participate in an RFQ, RFI or RPF in your e-mail inbox.

2. To enter the event, select the View Event option.

   a. Select “I intend to participate” if you do not yet wish to enter the event but want to participate in the event at some point.
   G42 will be notified that you will participate.

NOTE: The invitation will arrive from G42 for sourcing events.

1



Event information

For this section we will learn how to participate in the event

1. In the event information section you will find basic information and event details.

2. If you intend to participate you should check the box in the Intent to Respond section.

3. In the Attachments section you will find relevant attachments for the event information.

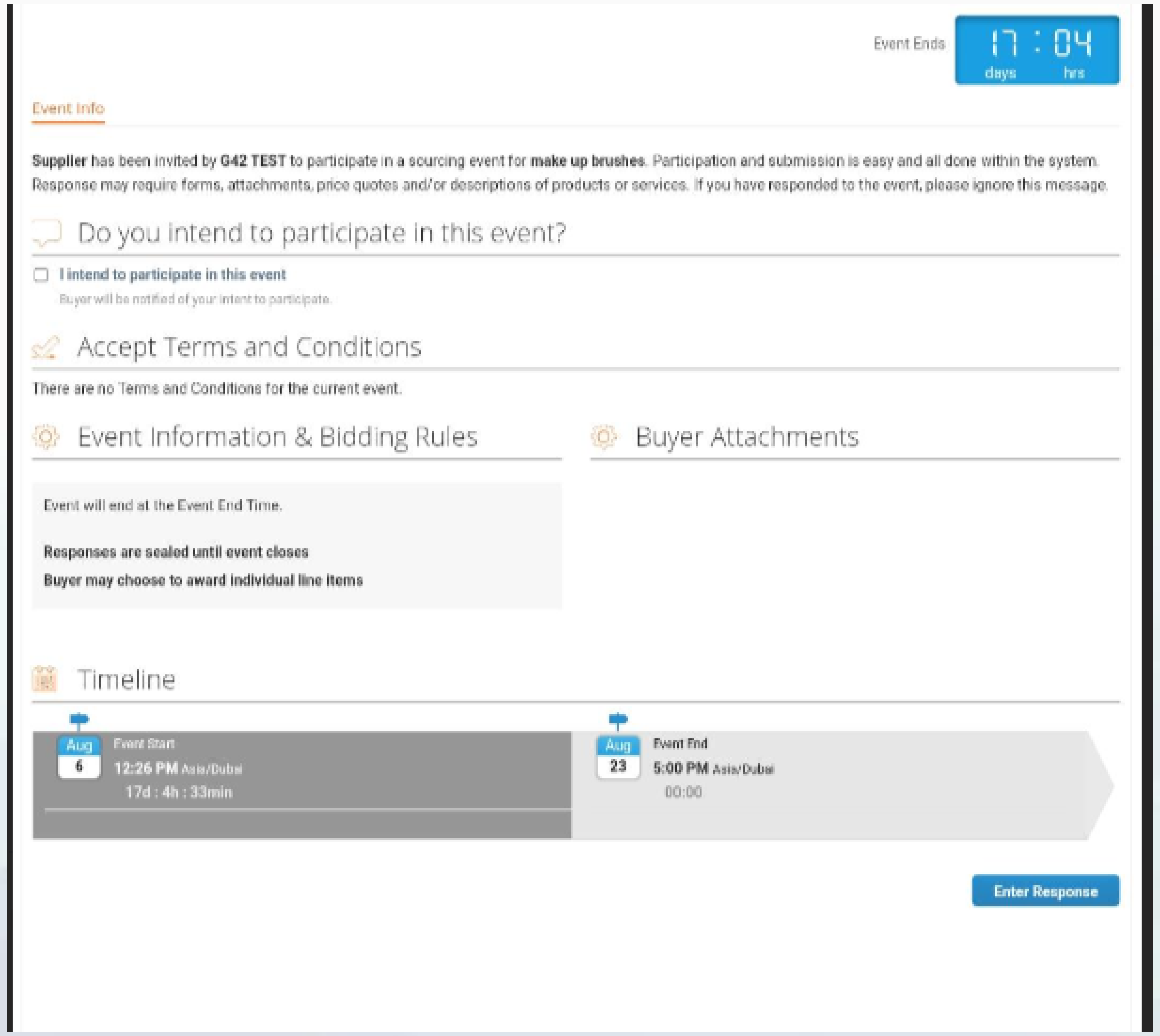
4. In the terms and conditions section you will find the corresponding information. You must accept the terms and conditions to continue

NOTE: The time of the event can be seen in the upper right-hand side in a blue box.

1

2

4



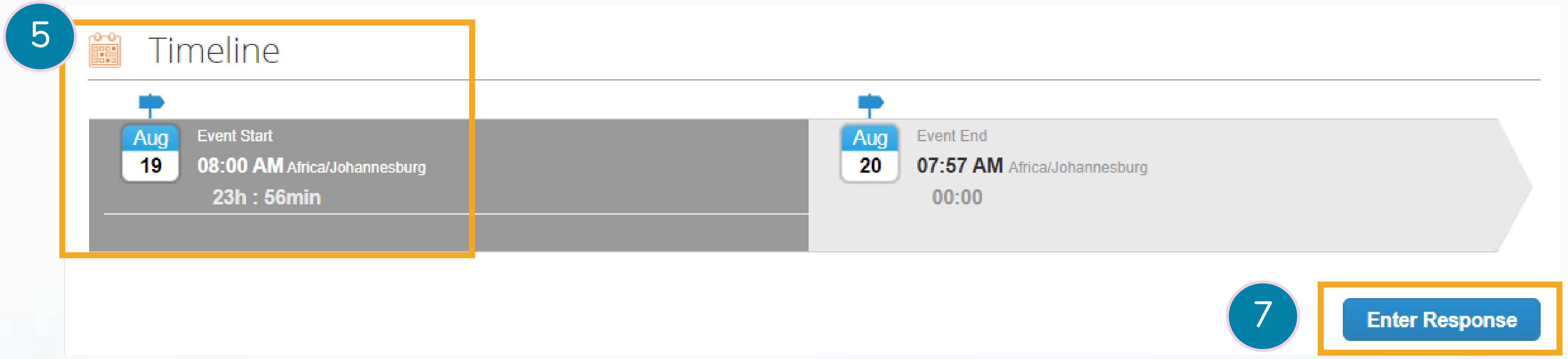
For this section we will learn how to participate in the event

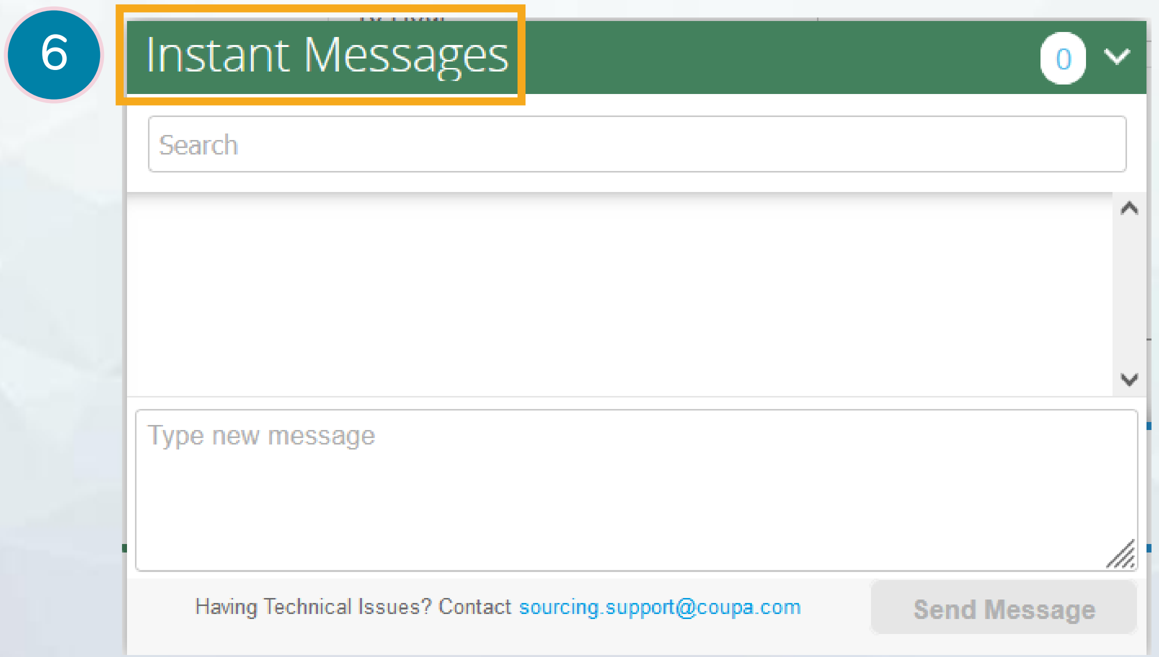
5 In the deadline section you will find the time of the event.

6 The Instant Message section is available to communicate with G42. It is the authorized channel

7 To continue with the process and see the details of the event, select the option to Enter Response.

NOTE: The message option will be enabled during the time the event is active.



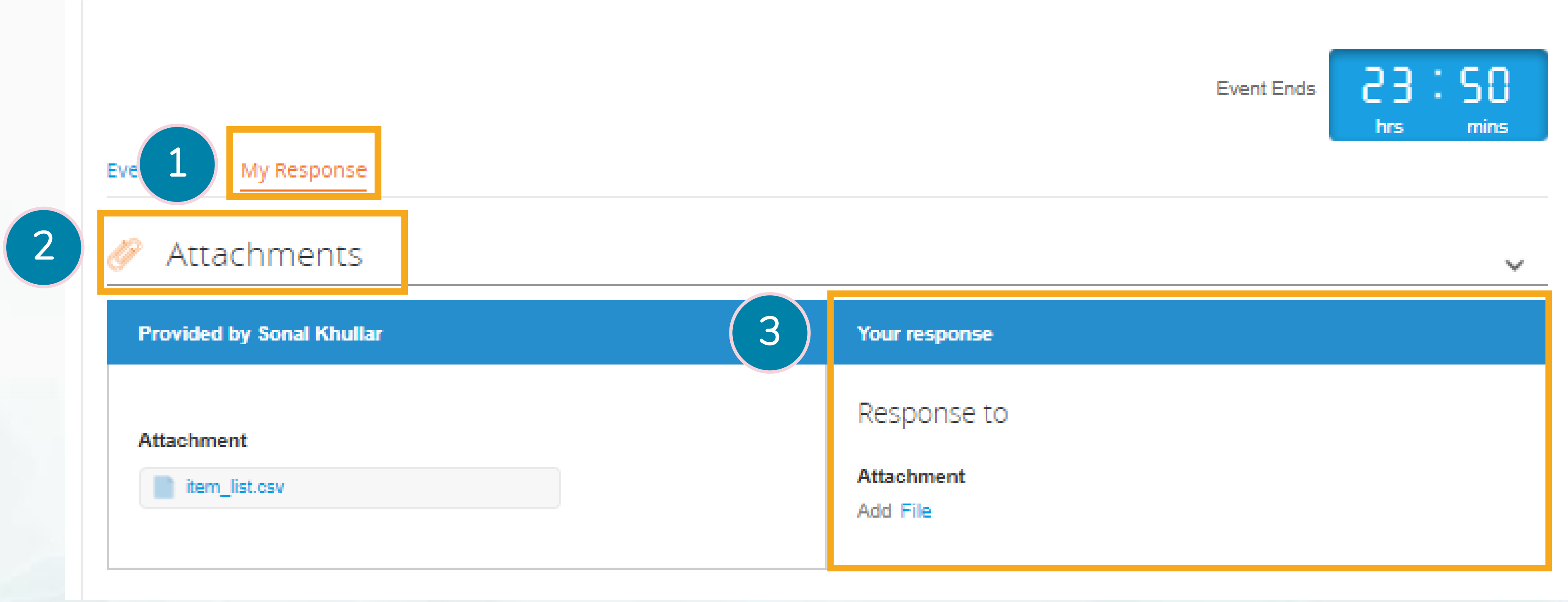


Entering the event, here you will find all the information related to the event and where you will have to provide your response

1. The orange color in the My Response tab refers to the field of work as a supplier.

2. In the *Attachments* section you will find the files sent by G42 which you must provide your response for. Some of them are mandatory

3. In the *Your response* section, you can attach the corresponding files.



NOTE: Attachments can be multiple, some of them are mandatory and others are optional

In this section you will learn how to download and upload attachments

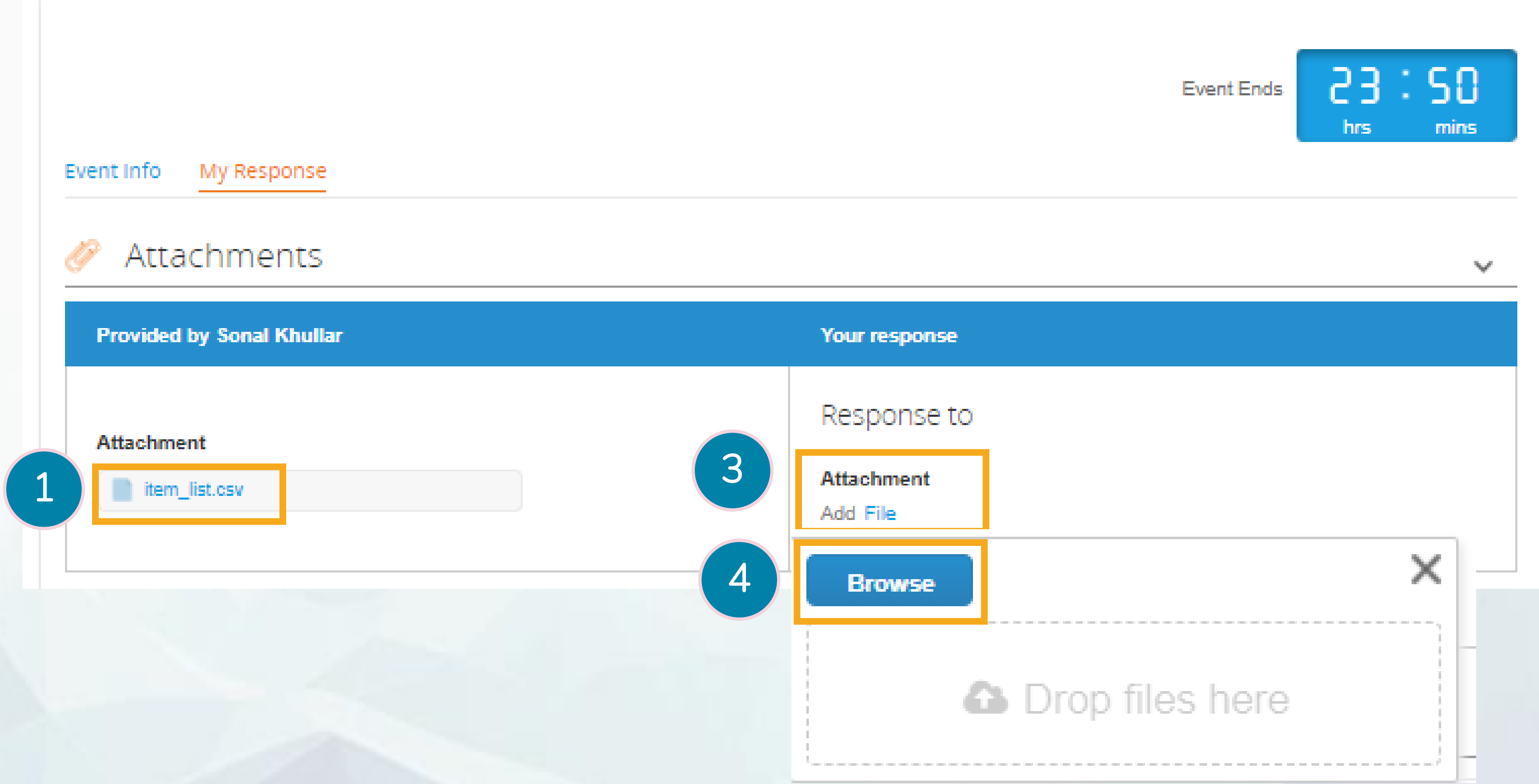
1. In the information section provided by the buyer, select the attached files to download them.

2. You will need to complete the requirements and save them to your computer.

3. To upload your files in the section of *Your response*, click Browse and select the files you want to upload.

4. Attach the files that are part of the response. Verify that they are uploaded correctly

NOTE: It is recommended to save the file with the same name it was downloaded with.



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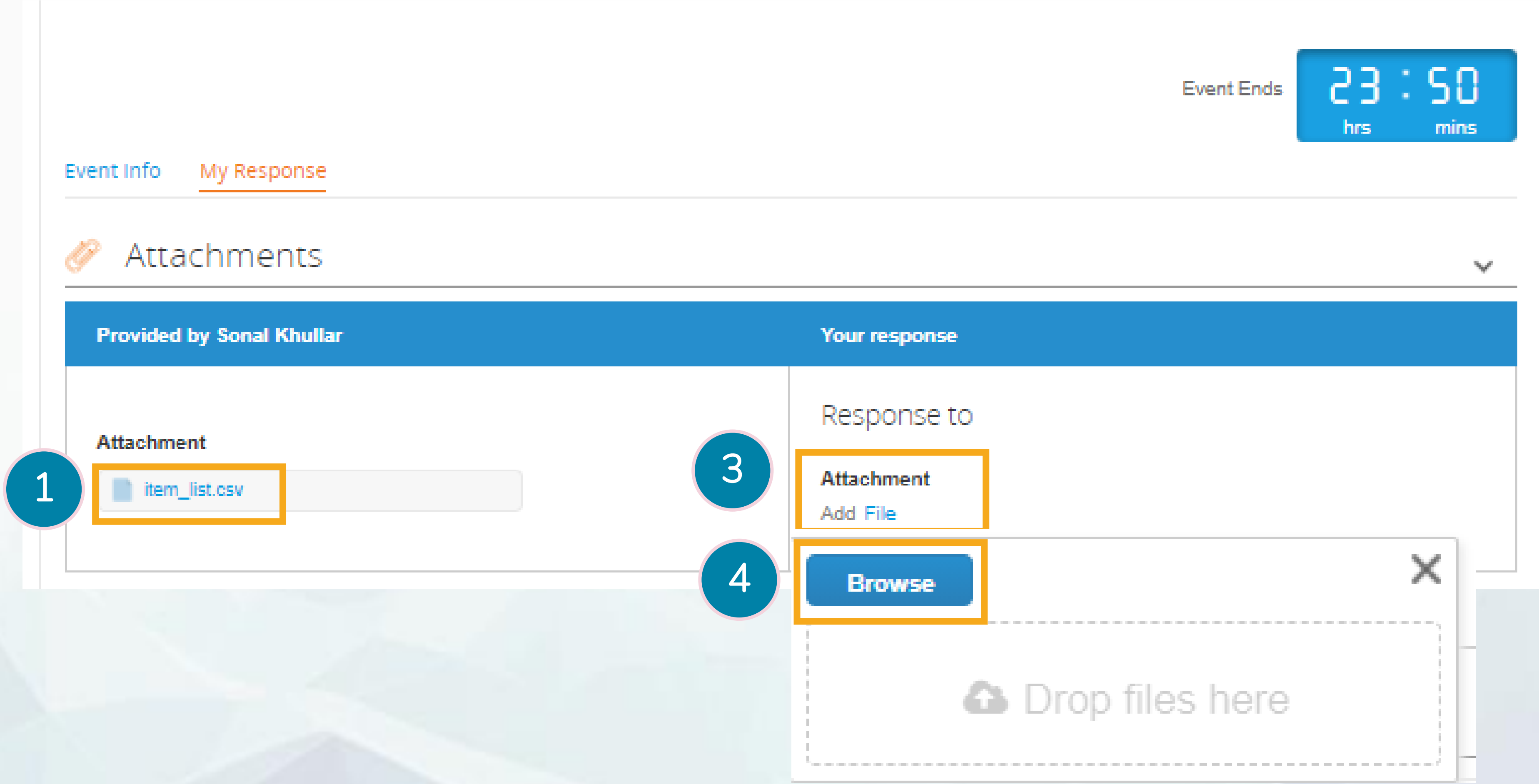
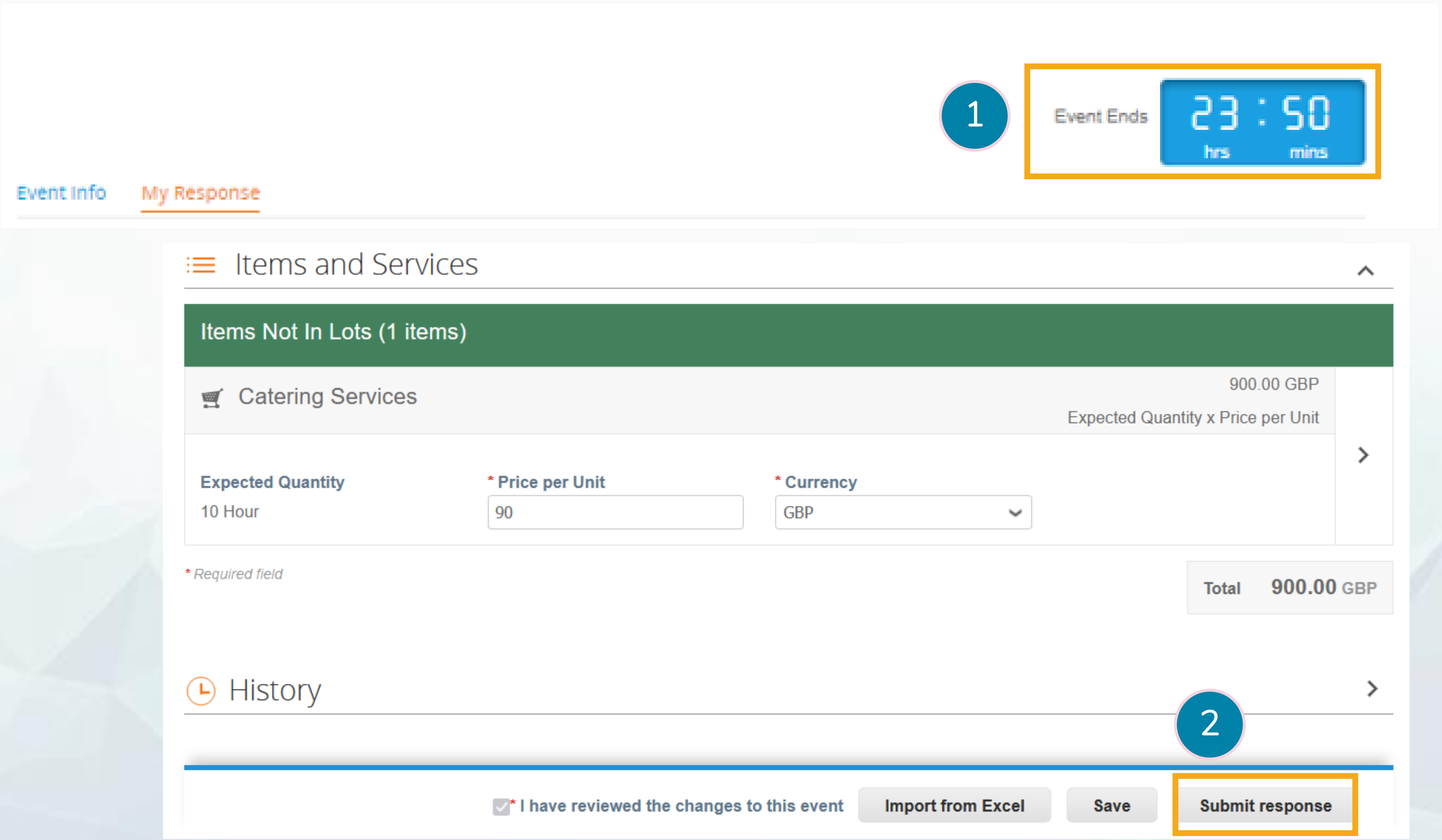


This section will explain how to send your response and the different options you have

1. Once the time limit expires you will not be able to send any more response.

2. Click Submit response to send your response to G42

NOTE: G42 will only be able to visualize the answers once the time has expired, that is why you can send your answer more than once, the last one you send is the one that G42 will be able to visualize.



Coupa training

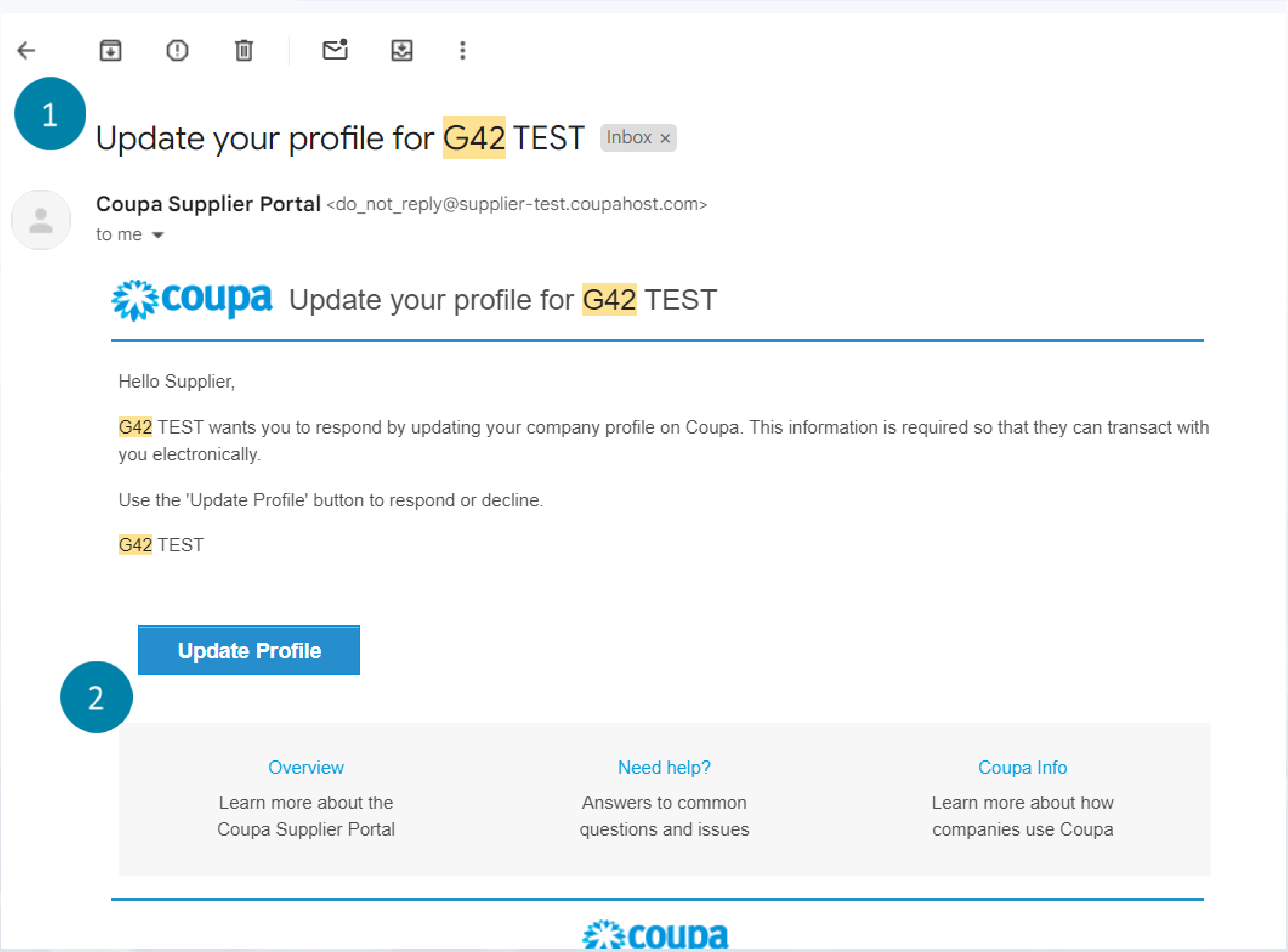
Supplier onboarding

This section will explain how to respond to a request for information from G42

1. You will receive an email from G42 that an action is required from you.

2. From the received email, click on **update profile.**

NOTE: If you have a profile created on the CSP, you will be asked to update your profile, otherwise a new profile needs to be created

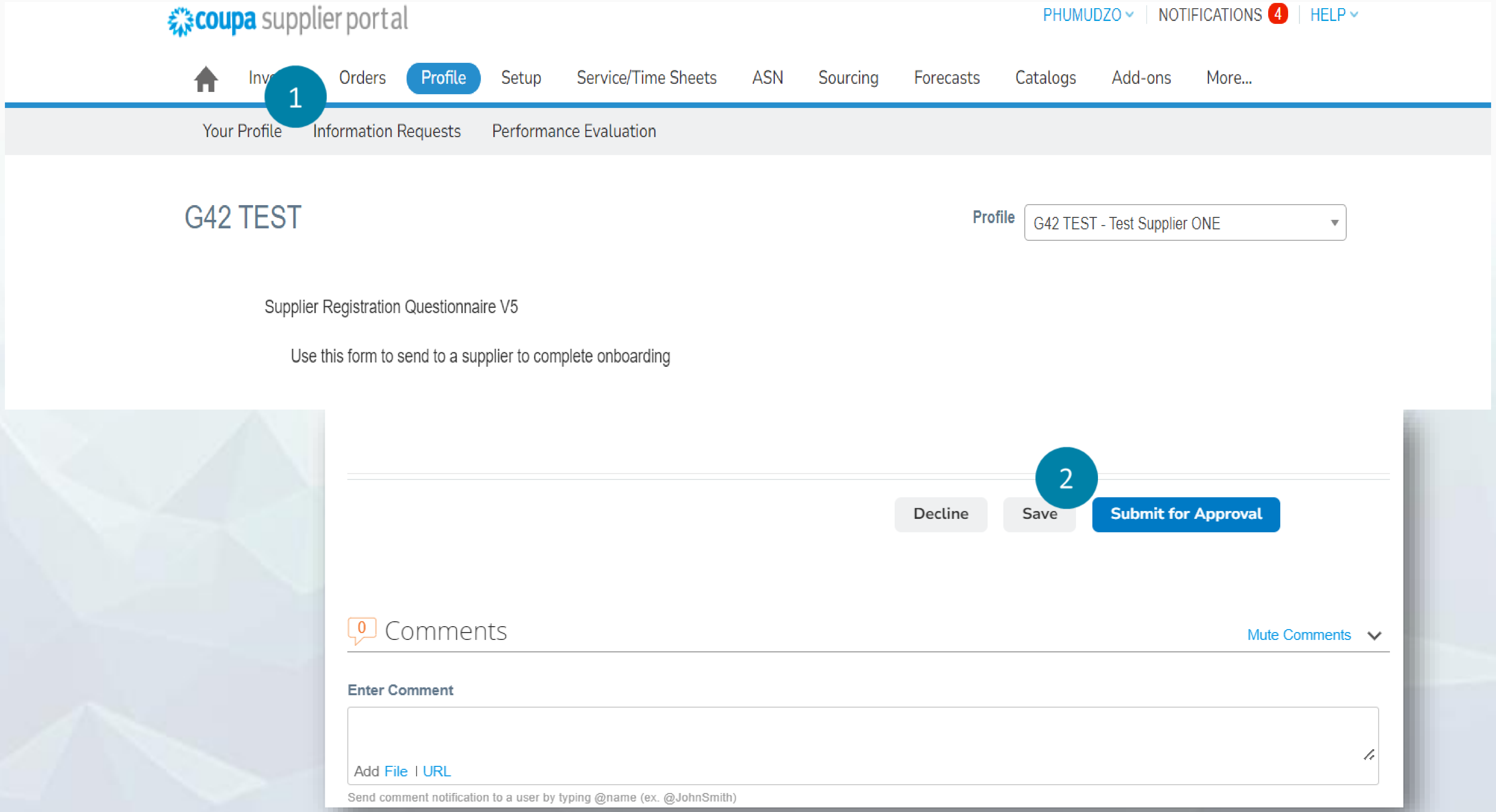


Supplier onboarding

This section will explain how to respond to a request for information from G42

1. Under the profile tab, go to information requests

2. Complete the form and all the required information and send your response.



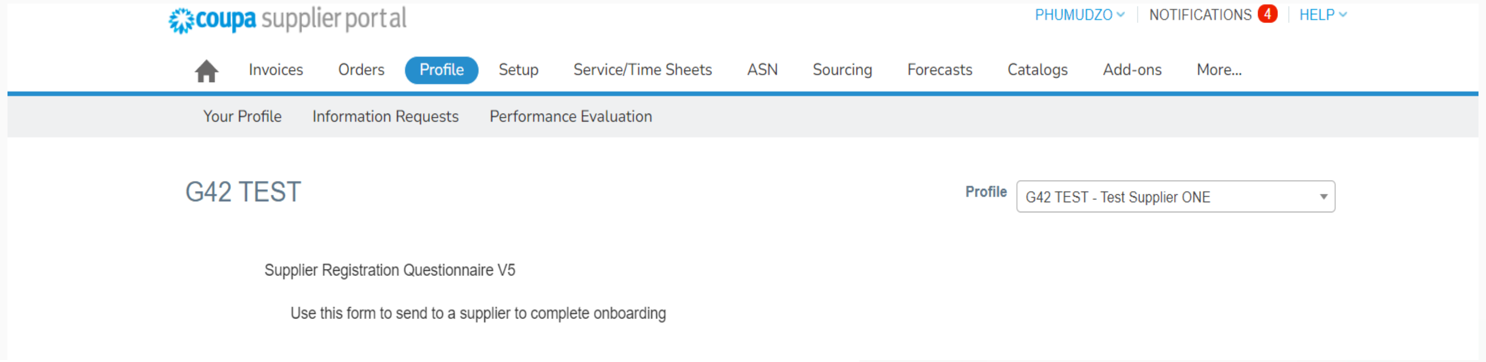
This section will explain how to respond to a request for information from G42

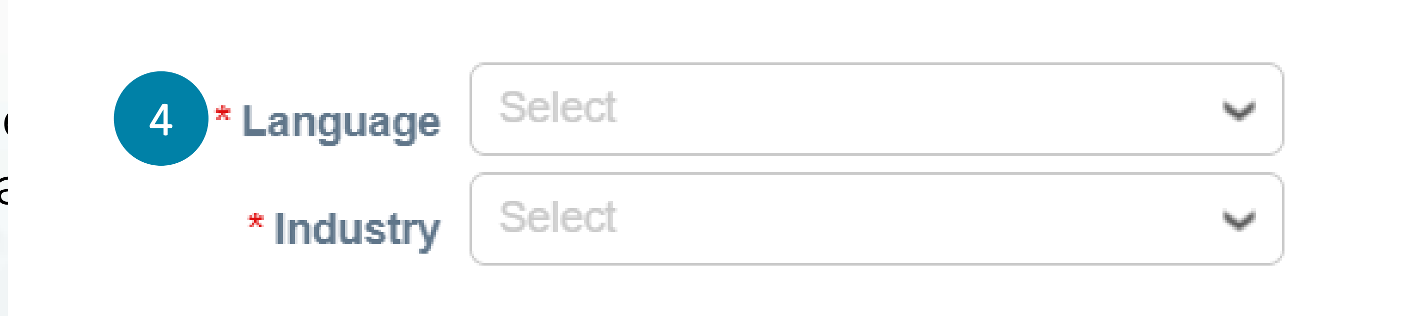
3 The information request section on the CSP is where the supplier would see the customers SIM form.

4 There are multipule required field, that have be determined by the G42. These fields will have a red asterisks next to the question.

5 For banking details, ensure that all the field that applies to your company is filled in. Not all fields that apply to your company will be required on the form.

3





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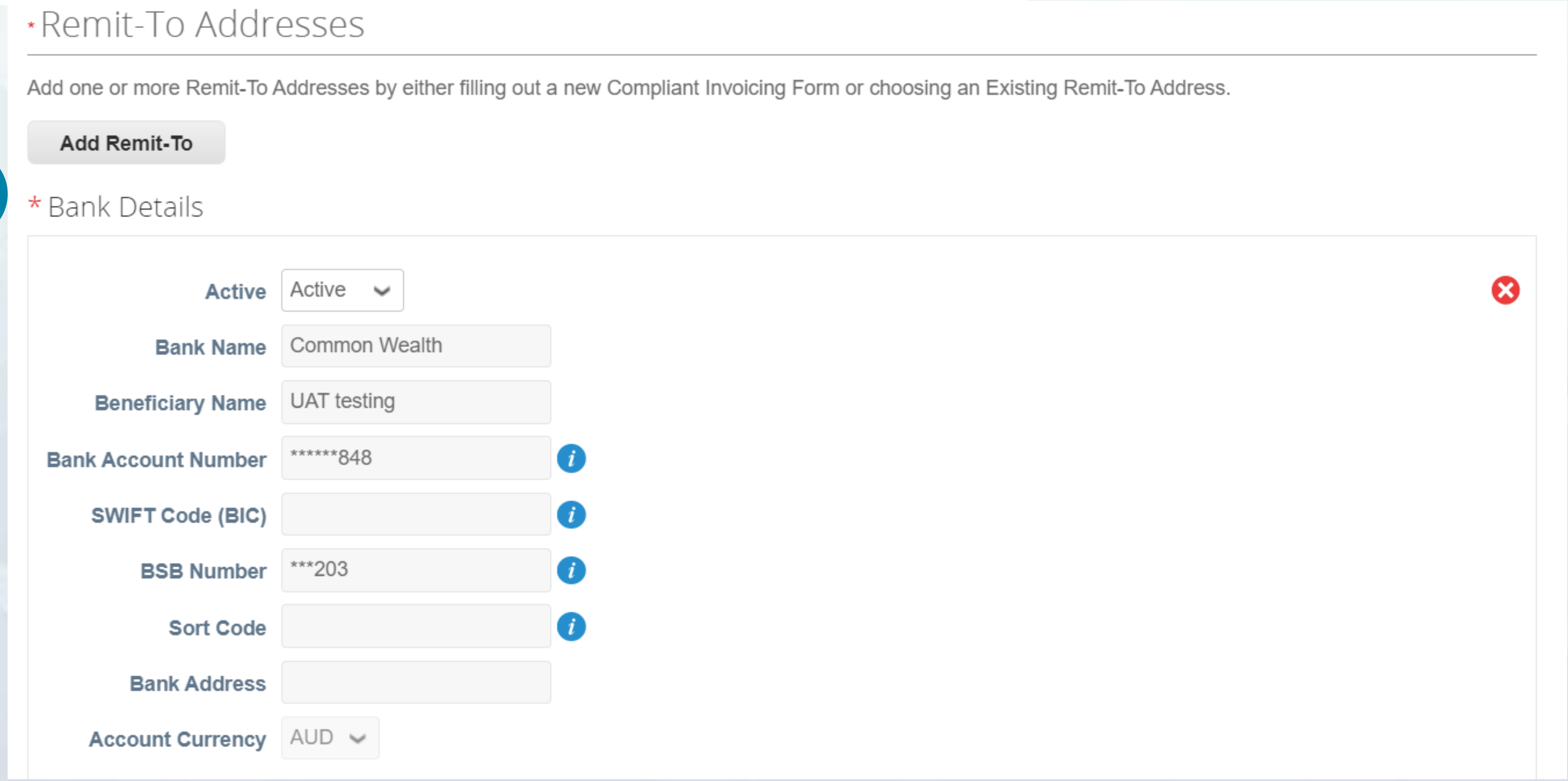

Coupa training

Additional support Coupa Guides Glossary

Dedicated to suppliers on success portal and available directly on CSP

Supplier portal guides

- https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal
- https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/purchase-orders
- https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/invoices

Glossary

- **CSP:** Coupa Supplier Portal means suppliers will be able to make inquiries and upload information related to their invoices. The CSP also allows monitoring the invoice payment status, including payment problems. In addition, all related notifications will be sent to the registered email account.
- **Change request**: Make change requests on a purchase order, it can be for example price or quantity.
- **Credit note**: Document through which you can cancel invoices previously made.
- **Invoice:** Through Coupa you will have the possibility to generate an invoice against a purchase order (PO) and be able to follow it up
- **Sourcing Event:** RFx Events consist of Request for Information, Request for Quotation, and Request for Proposal defined by one buyer and many sellers.

Glossary

RFX: RFI, RFQ or RFP

- RFI: Request for Information. Type of sourcing event used to collect qualitative information about suppliers or initiatives.
- RFQ: Request for quotation. Type of sourcing event that is used to obtain specific prices for products or services
- RFP: Proposal request. Type of sourcing event used when the product or service you obtain is complex in nature and requires a qualitative and quantitative assessment of the suppliers.
- Lots: Group of Items/Services That Need to Be Purchased Together from the Same Provider.
- Items: Lists of items to be procured. These can be set-up to be purchased together or from multiple suppliers if needed.
- Questionnaire: Form that the supplier must complete with the options indicated (checkbox, text, attachments, or radio buttons) for further evaluation in the event evaluation process.

Questions?

We are here to support you every step of the way.