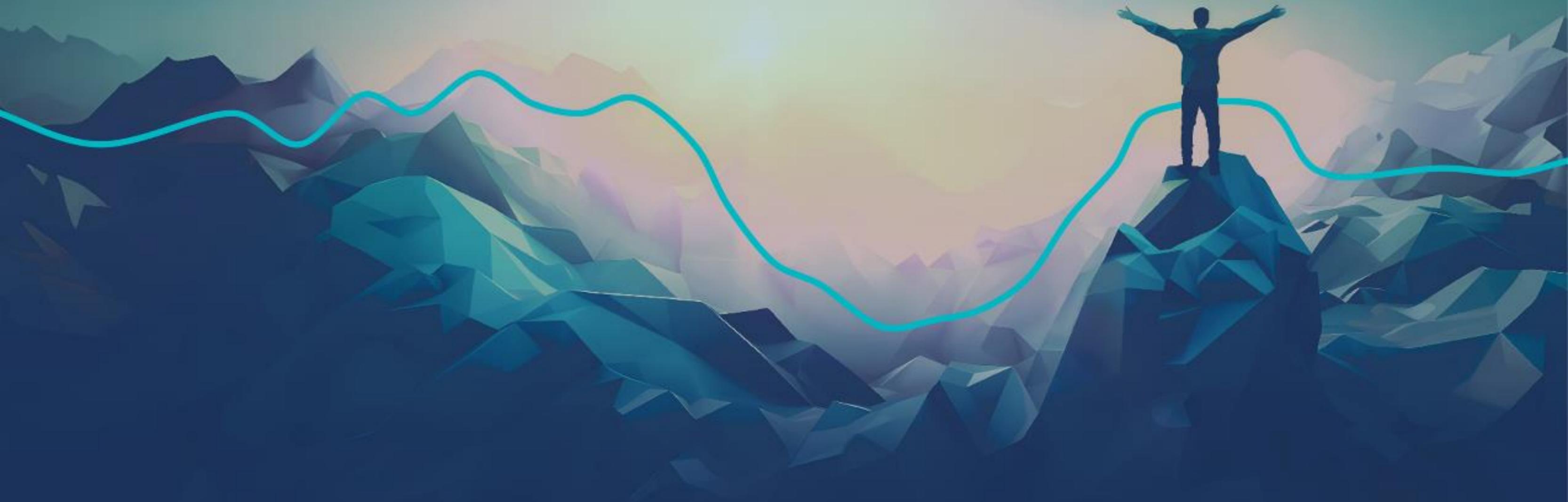


Coupa Supplier Portal



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

01 Why Coupa?

02 Supplier portal login

03 Navigation and use of the portal

- a) Supplier Portal functions
- b) Home tab
- c) Profile tab
- d) Orders tab
- e) Invoices tab
- f) Administrator Tab

04 Create an invoice from a purchase order

05 Create a credit note

06 Administrator tab and notifications setting

07 Manage Notifications

08 Sourcing events (RFQ, RFP)

09 Supplier onboarding

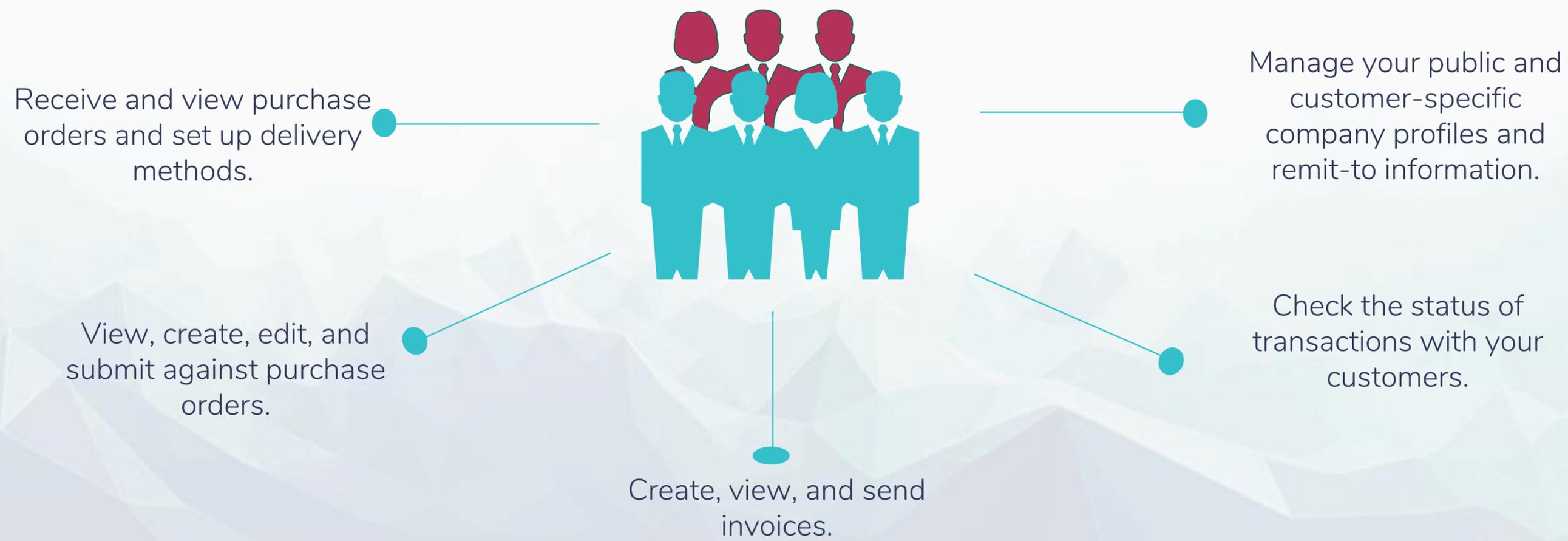
10 Additional support

Coupa training

Why Coupa?



Benefits of the Coupa Supplier Portal



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.



Coupa training

Coupa Supplier Portal Login



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

1 Update your profile for **G42 TEST** Inbox x

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to me ▾

 Update your profile for **G42 TEST**

Hello Supplier,

G42 TEST wants you to respond by updating your company profile on Coupa. This information is required so that they can transact with you electronically.

Use the 'Update Profile' button to respond or decline.

G42 TEST

[Update Profile](#)

2

Overview Learn more about the Coupa Supplier Portal	Need help? Answers to common questions and issues	Coupa Info Learn more about how companies use Coupa
--	--	--

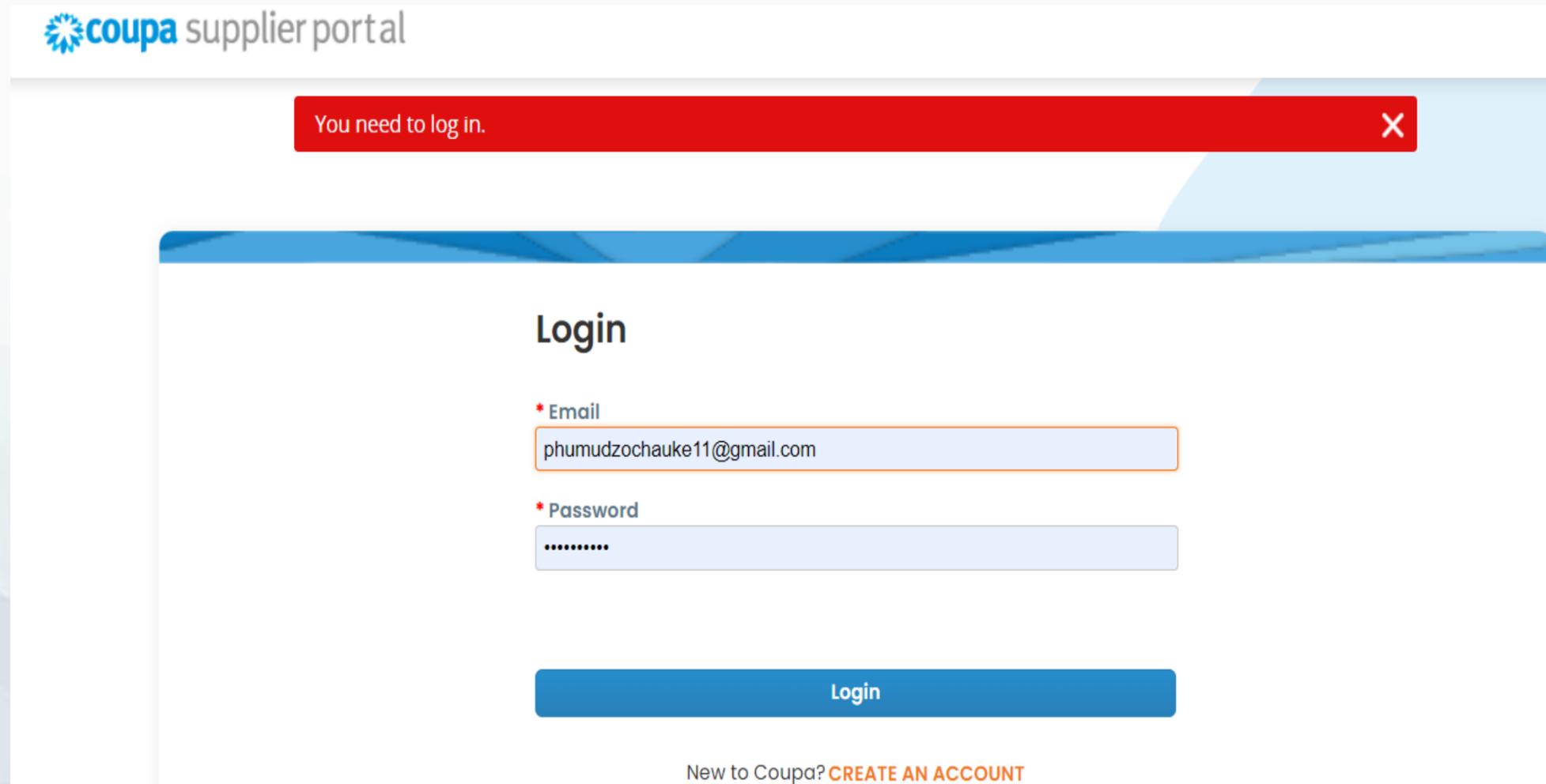

Business Spend Management

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

Supplier portal login

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

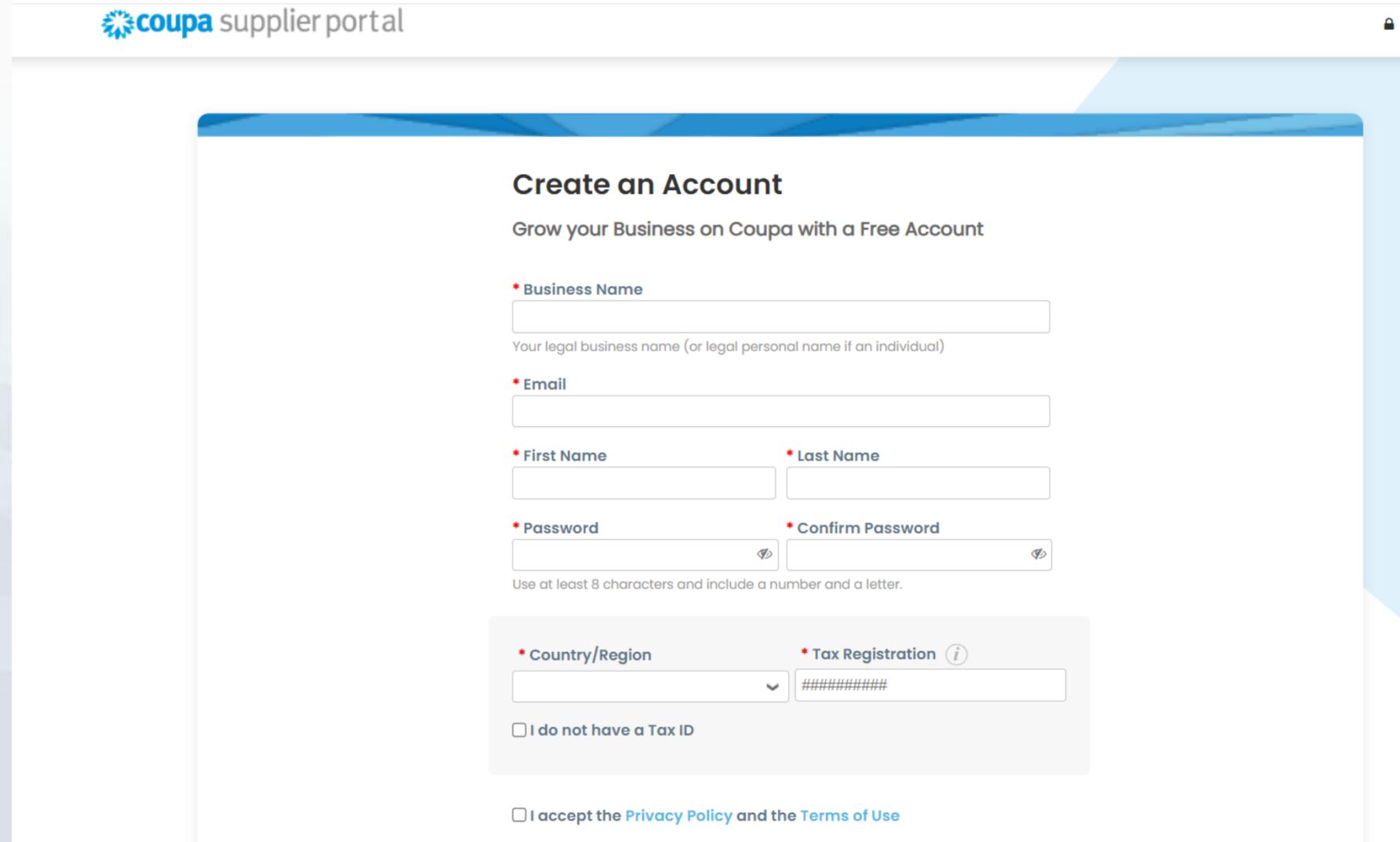
- Suppliers who already have a Coupa account can continue to put in their email and password to log in.



The screenshot displays the Coupa supplier portal login interface. At the top left, the Coupa logo and 'supplier portal' text are visible. A red notification bar at the top center contains the message 'You need to log in.' with a close button (X). Below this is a white login form with a blue header. The form is titled 'Login' and contains two input fields: 'Email' with the value 'phumudzochauke11@gmail.com' and 'Password' with masked characters. A blue 'Login' button is positioned below the fields. At the bottom of the form, there is a link: 'New to Coupa? [CREATE AN ACCOUNT](#)'.

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)



The screenshot shows the 'Create an Account' page on the Coupa Supplier Portal. The page header includes the Coupa logo and 'supplier portal' text. The main heading is 'Create an Account' with the sub-heading 'Grow your Business on Coupa with a Free Account'. The form contains the following fields and options:

- * Business Name**: A text input field with a placeholder 'Your legal business name (or legal personal name if an individual)'.
- * Email**: A text input field.
- * First Name** and *** Last Name**: Two separate text input fields.
- * Password** and *** Confirm Password**: Two text input fields with eye icons for visibility. A note below states: 'Use at least 8 characters and include a number and a letter.'
- * Country/Region**: A dropdown menu.
- * Tax Registration**: A text input field with a placeholder '#####' and an information icon.
- I do not have a Tax ID
- I accept the [Privacy Policy](#) and the [Terms of Use](#)

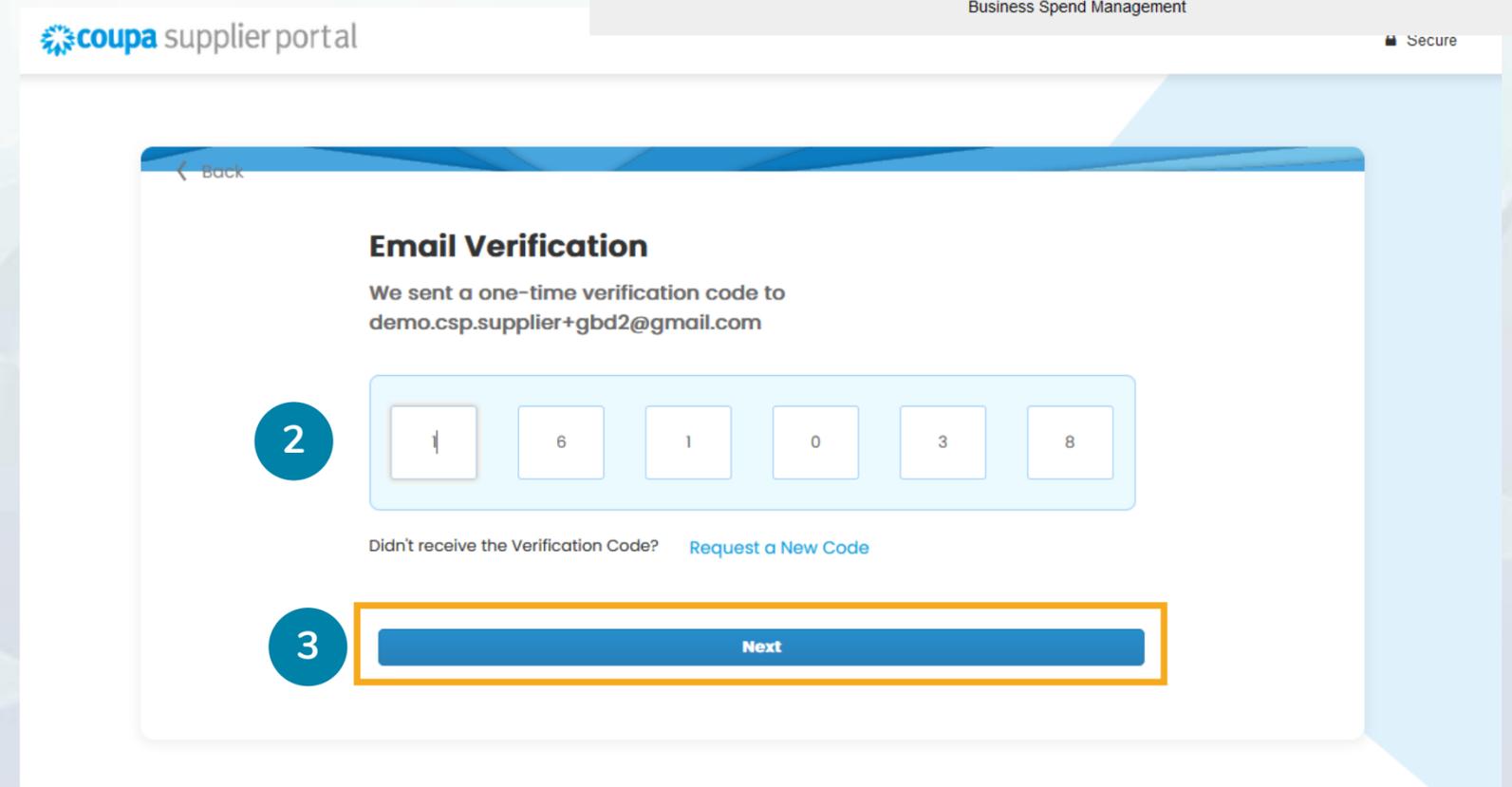
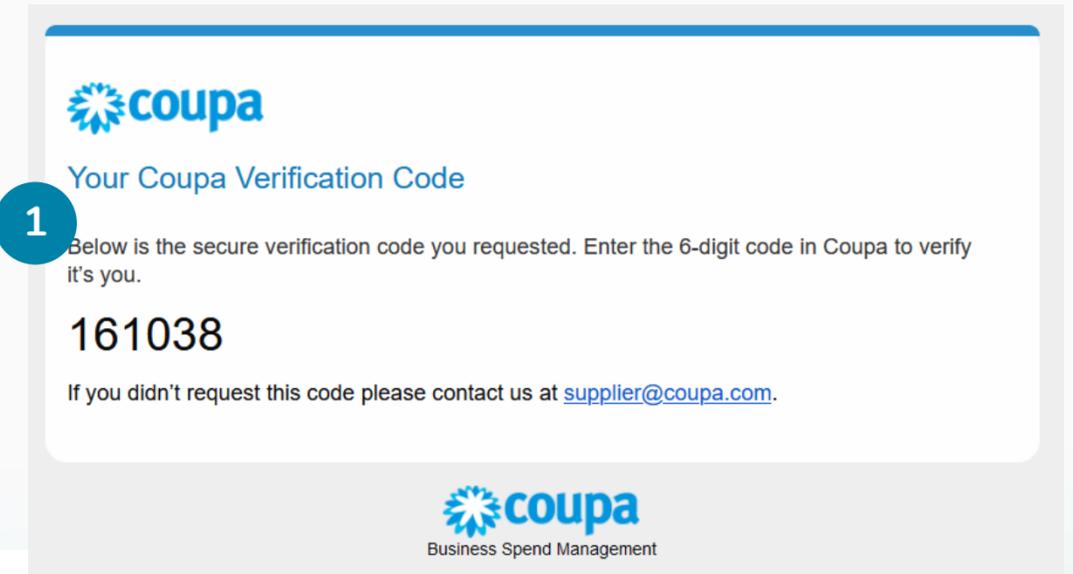
Supplier portal login

In this section 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.

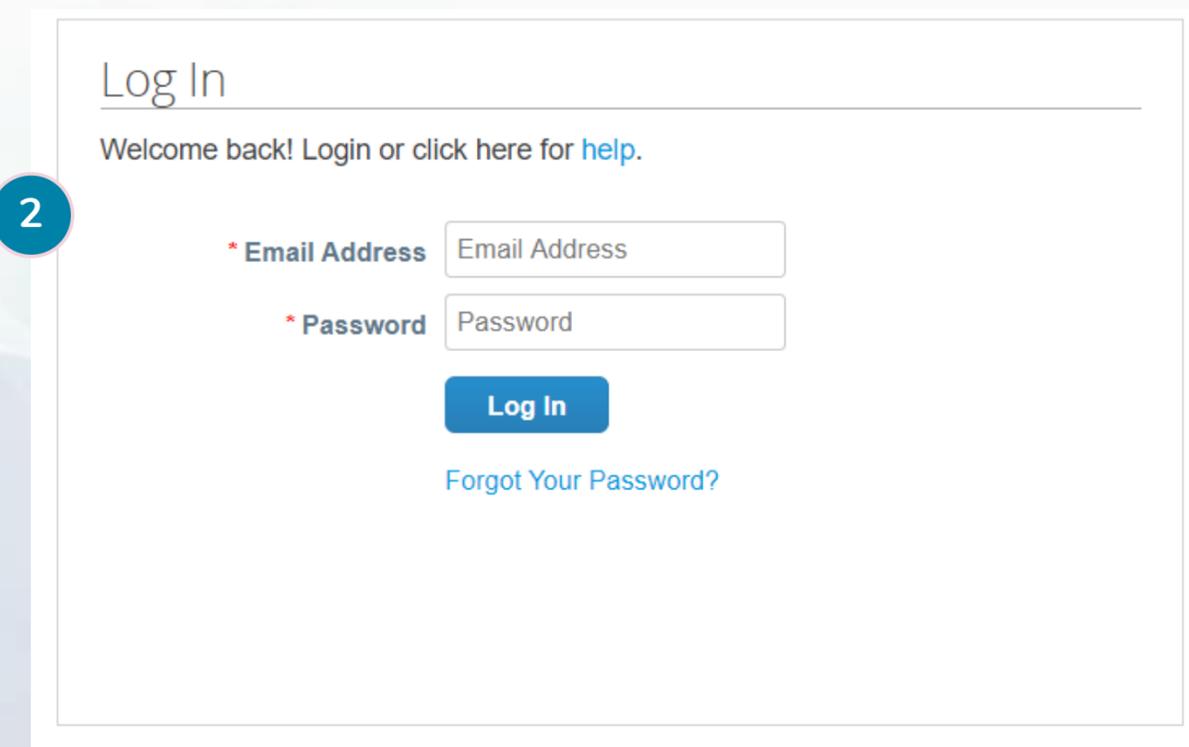
- 3 Click **Next** to continue setting up your profile.



Supplier Portal login

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.



Log In

Welcome back! Login or click here for [help](#).

* Email Address

* Password

[Log In](#)

[Forgot Your Password?](#)

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

Supplier Portal Login

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 to enable MFA for your user profile, it's important to save your recovery codes.

The screenshot displays the 'Recovery Codes' section of the Coupa Supplier Portal. The section title is 'Recovery Codes' and it states that the codes were generated on July 31, 2024. It explains that emergency recovery codes are the only way to restore access if a user loses their authenticating device or app, and that each code can only be used once. A table lists six recovery codes:

9_n42A	rUrhQ
jiaOKQ	ohl3gA
Z6tvJQ	u5rZ2w

At the bottom of the section, there are three buttons: 'Copy', 'Download', and 'Print'. The 'Download' button is highlighted with a red box and a blue circle containing the number '1'. A download notification is visible, showing a file named 'recovery_codes-2024-08-02.csv' (47 bytes) has been completed. In the background, a dialog box titled 'Keep your account secure' prompts the user to 'Enable Two-Factor Authentication' with a 'Set Up Now' button.



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.

Coupa training

Navigation and use of the portal



Navigation and use of the supplier 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.

The screenshot shows the Coupa Supplier Portal interface for a user named PHUMUDZO. The top navigation bar includes a home icon (labeled '1'), a menu with options like Invoices, Orders, Profile, Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More..., and a user profile section (labeled '2') with a dropdown arrow, a notification bell with 4 notifications, and a HELP link.

The main content area is for 'Test Supplier LL' (TS), showing a profile progress of 71% and a last update of 4 days ago. Below this is a 'Recent Activity' section with a 'View' dropdown and an information icon. It lists three items: 'Absa Group Limited DEV', 'Exxaro Resources QA', and 'Absa Group Limited UAT' (with a 'More...' button). The first item is expanded to show 'Order # 2014-000442' with status 'Issued' on 'Jun 13' and details 'G42 TEST • 5250.0 • AED • Not Invoiced'. The second item is 'Information Request' with status 'Due Now' on 'Jun 13' and details 'G42 TEST • Received 53 days ago'.

On the right, there is an 'Announcements' section for 'Samancor Chrome QA' dated '31 Jul 2021' regarding 'POPIA Compliance'. It includes a notice: 'For requests for access to and amendment of personal information or reporting of complaints and suspected data breaches, kindly contact the Samancor Information Officer'. A '1 of 1' indicator is at the bottom.

At the bottom, there are four summary cards: 'Two Factor Security' (0 of 6 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (26 Connections).

Navigation and use of the supplier portal

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.

The screenshot shows the Coupa Supplier Portal interface for a user named PHUMUDZO. The main header includes navigation links: Invoices, Orders, Profile, Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More... The user's profile is identified as 'Test Supplier LL' with a profile progress of 71% and a last update of 4 days ago. The main content area is divided into several sections:

- 1 Announcements:** Located on the right side, featuring a notice from Samancor Chrome QA dated 31 Jul 2021 regarding POPIA Compliance. It includes a warning that for requests for access to and amendment of personal information or reporting of complaints and suspected data breaches, users should contact the Samancor Information Officer.
- 2 Recent Activity:** Located in the center, showing a list of activities. The first activity is an 'Order # 2014-000442' issued on Jun 13, with details 'G42 TEST • 5250.0 • AED • Not Invoiced'. The second activity is an 'Information Request' due now on Jun 13, with details 'G42 TEST • Received 53 days ago'. Above the list are filters for 'Absa Group Limited DEV', 'Exxaro Resources QA', and 'Absa Group Limited UAT', along with a 'More...' button.
- 3 Two Factor Security:** Located at the bottom left, showing '0 of 6 Users'.
- 4 Join Requests:** Located at the bottom center-left, showing '0 Users'.
- 5 Merge Suggestions:** Located at the bottom center-right, showing '0 Duplicates'.
- 6 Linked Customers:** Located at the bottom right, showing '26 Connections'.



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

Navigation and use of the supplier portal

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.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, user name 'PHUMUDZO', 'NOTIFICATIONS 4', and 'HELP'. The navigation menu contains 'Invoices', 'Orders', 'Profile' (highlighted), 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below the navigation, there are tabs for 'Your Profile', 'Information Requests', and 'Performance Evaluation'. The 'Your Profile' section is active, showing a sidebar with 'Company Profile' (marked with a '1'), 'Environmental, Social, Governance & Diversity', 'Risk & Compliance', 'Financial Performance', and 'Ratings & References'. The main content area features a yellow banner with a warning icon and text: 'Complete your profile to get discovered by Coupa buyers that are looking for items in your category.' Below this is another yellow banner: 'Samancor Chrome requires additional information to conduct business with you Start Getting Paid'. The profile details for 'Test Supplier LL' are shown, including a 'Profile Progress' bar at 71% and an 'Edit Profile' button (marked with a '2'). The 'Last Updated' date is '4 days ago'. At the bottom, there are links for 'Profile preview', 'Copy profile URL', and 'Download Profile as PDF'. The footer includes 'Doing Business As AL BUHEIRA LACNOR DAIRIES L.L.C', 'Is Ultimate Parent Yes', 'Primary Address 340 Voortrekker Road, 340, Parow East, Western Cape, 7500 South Africa', and a 'Chat with Coupa Support' button.

Navigation and use of the supplier portal

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

Company Profile 1



* Company Name Doing Business As Is Ultimate Parent Yes No

Primary Address

Address line Address line 2 City

State Postcode Country/Region

[Chat with Coupa Support](#)

2

Primary Address

Address line Address line 2 City

State Postcode Country/Region

Primary Contact i

* First Name * Last Name

* Email Role

Preferred Phone Mobile number

Work number Photograph 

Public

[+ Add another contact](#)



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.

Navigation and use of the supplier portal

This section corresponds to all the purchase orders you have received

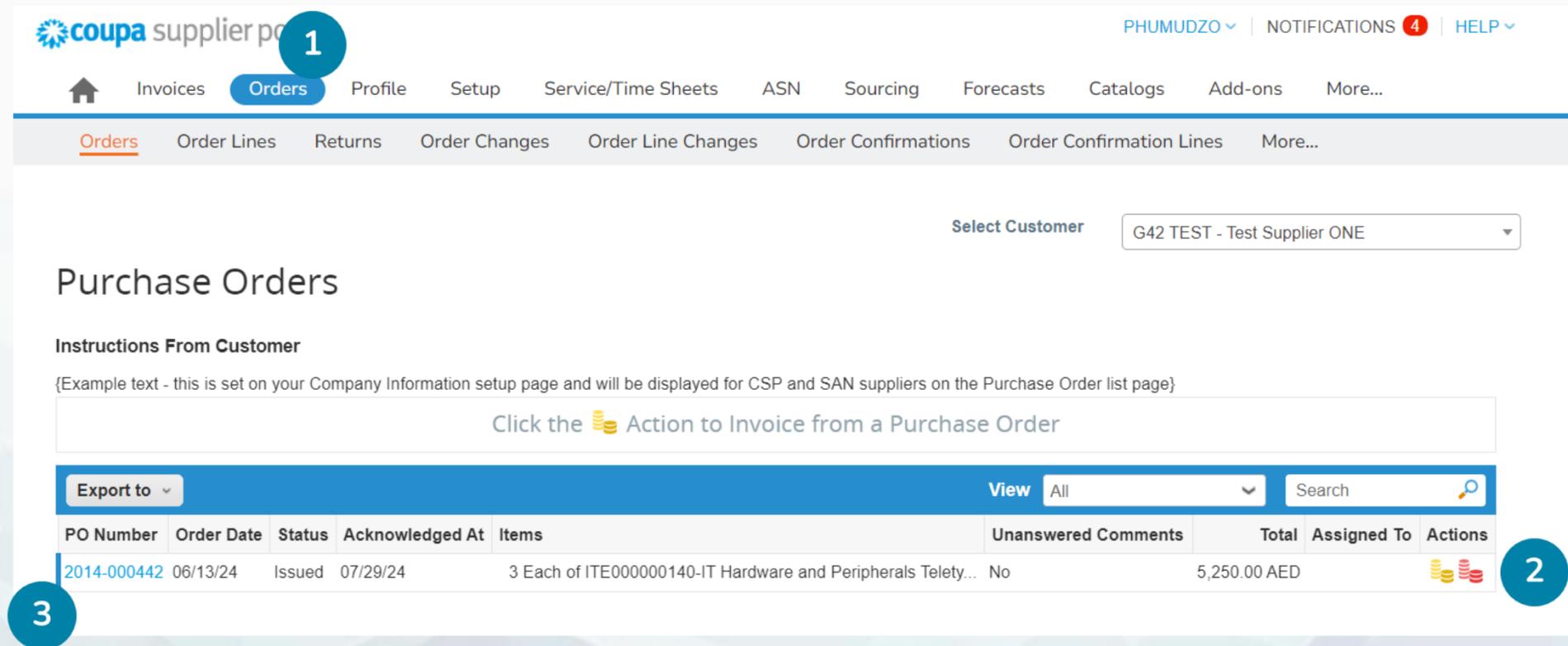
1 In the orders tab you will be able to see the history of purchase orders, the status, date and a short description.

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



coupa supplier portal PHUMUDZO | NOTIFICATIONS 4 | HELP

Home Invoices **Orders** Profile Setup Service/Time Sheets ASN Sourcing Forecasts Catalogs Add-ons More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer G42 TEST - Test Supplier ONE

Purchase Orders

Instructions From Customer
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Invoice from a Purchase Order

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
2014-000442	06/13/24	Issued	07/29/24	3 Each of ITE000000140-IT Hardware and Peripherals Telety...	No	5,250.00 AED		 



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

Navigation and use of the supplier portal

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

Purchase Order #2014-000442

Select Customer: G42 TEST - Test Supplier ONE

General Info

Status: Issued - Sent via Email
 Order Date: 06/13/24
 Revision Date: 06/13/24
 Requester: Ntsako Mabunda
 Email: ntsako.mabunda@core42.ai
 Payment Term: N60D
 Attachments: None
 Acknowledged:
 Assigned to:

Shipping

Ship-To Address: Capital Gate Tower
 Khaleej Al Arabi Street
 0 Al Maryah
 United Arab Emirates
 Location Code: G Forty Two General Trading - LLC
 Attn: Ntsako Mabunda
 Terms: None

Shipment Tracking

No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	ITE000000140-IT Hardware and Peripherals Teletype Equipment	3	Each	1,750.00	5,250.00	0.00

* Need By	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number
06/27/24	None	None	None	None

Per page: 15 | 45 | 90

Total AED 5,250.00

4 Create Invoice Save Print View



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

3.9 INVOICES TAB Navigation and use of the supplier portal

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.

coupa supplier portal PHUMUDZO | NOTIFICATIONS 4 | HELP

Home Invoices Orders Profile Setup Service/Time Sheets ASN Sourcing Forecasts Catalogs Add-ons More...

1 Invoices Invoices Lines Payment Receipts

Select customer G42 TEST

Invoices

Instructions From Customer
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

2 Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	3 PO #	Total	Unanswered Comments	Dispute Reason	Actions
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		

Per page 15 | 45 | 90

Coupa training

Creating an invoice from a purchase order



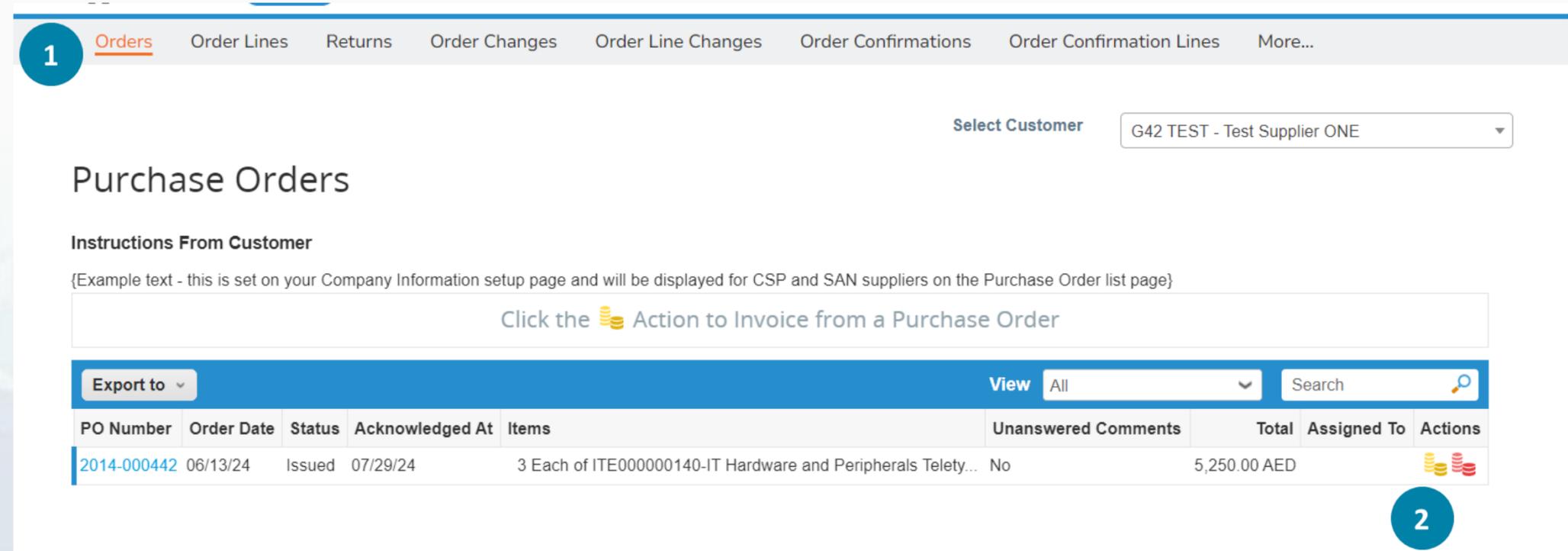
REINVOICE FROM A PURCHASE ORDER

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 



1 **Orders** Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer G42 TEST - Test Supplier ONE

Purchase Orders

Instructions From Customer
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
2014-000442	06/13/24	Issued	07/29/24	3 Each of ITE000000140-IT Hardware and Peripherals Telety...	No	5,250.00 AED		 

2

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 process for all orders separately

Creating an invoice from a purchase order

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

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer: G42 TEST - Test Supplier ONE

Create Invoice Create

1 General Info

Invoice #

Supplier Test Supplier ONE

Supplier VAT ID 4999999999

Invoice Date 08/05/24

Payment Term N60D

Invoice From Address phumu \$ Tendi
12 Pretoria Road, Kempton Park
Johannesburg
1620
South Africa

Currency AED

Status Draft

Remit-To Address phumu \$ Tendi
12 Pretoria Road, Kempton Park
Johannesburg
1620
South Africa

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

Bank Name: nedbank

Beneficiary Name: phumu \$ Tendi

Bank Account Number: *****6625

SWIFT Code: ****ZAJJ

Supplier Part Number

Billing G42 Corporate-IT Hardware and Peripherals-2014-P000019-01-Material-PP00035

Taxes

Tax Description	Tax Rate	Tax Amount
AE: Foreign-OS - 0.0%	0.000	0.00
AE: Foreign-PurchExm - 0.0%		
AE: Foreign-PurchGoods - 0.0%		
AE: Foreign-PurchServs - 0.0%		
AE: Foreign-Purchzero - 5.0%		
AE: Local-NR - Non-Recoverable - 5.0%		
AE: Local-OS - OS - 0.0%		
AE: Local-PurchExm - Purchases-Exempt - 0.0%		
AE: Local-PurchGoods - 5.0%		
AE: Local-PurchServs - Purchases-Standard rate - 5.0%		
AE: Local-PurchStd - Purchases-Standard rate - 5.0%		
AE: Local-PurchZero - Purchases-Zero rated - 0.0%		

Totals & Taxes

Lines Net Total	5,250.00
Lines Tax Totals	0.00

Chat with Coupa Support

Internal

4.2 CREATING AN INVOICE FROM A PURCHASE ORDER

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.

3 **Totals & Taxes**

Lines Net Total	20.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax <input type="text" value="0.000"/> % <input type="text" value="0.000"/> 	
Total Tax	0.00
Net Total	20.00
Total	20.00

4

5

Comments
Mute Comments ▼

Enter Comment

Send Comment notification to a user by typing @name (ex. @JohnSmith)

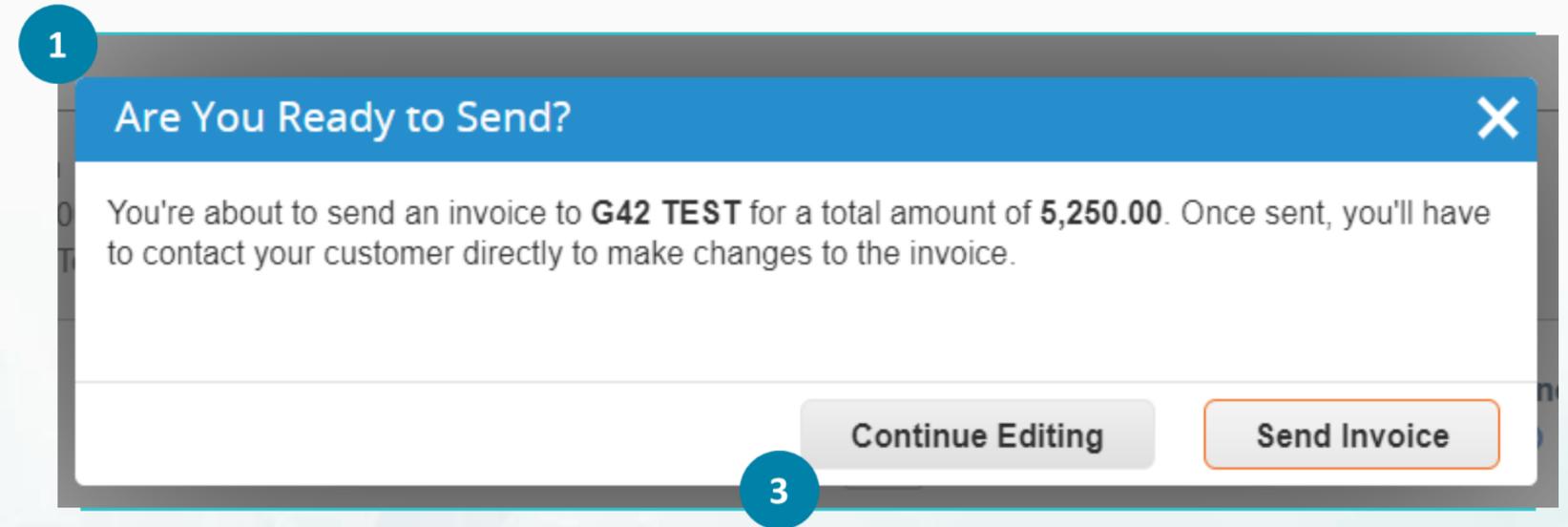
Attachments [Add File](#) | [URL](#)
Add Comment

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.



Creating an invoice from a purchase order

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?

Select customer G42 TEST ▼

1 Invoices

Instructions From Customer
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices i

Create Invoice from PO
Create Invoice from Contract
Create Blank Invoice
Create Credit Note

Export to ▼
View All ▼
Search 🔍

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		✎ ✖

Per page [15](#) | [45](#) | [90](#)

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	<p>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.</p> <p>To resolve the dispute, you need to review and correct the mistakes in the invoice and resubmit it (see next slide).</p>
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.

Coupa training

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.

Select customer

Invoices **1**

Instructions From Customer
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices **i**

2

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		

Create a credit note

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

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

3 **Reason** Resolve issue for invoice number Other (e.g. rebate)

4

5

Credit Note ✕

How do you want to correct invoice "ZINCCORP TEST 3" ?

6 Completely cancel the invoice with a credit note i Adjust invoice with a credit note i

7

7.1 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.

Create Credit Note Create

7 General Info

* Credit Note #

* Credit Note Date

Payment Term

* Currency

Status

Original Invoice #

Original Invoice Date

Attach Copy Of Invoice Here No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

From

* Supplier

* Invoice From Address

* Remit-To Address

* Ship From Address

To

Customer

Buyer VAT ID

8 Lines Line Level Taxation

Type	Adjustment Type	Qty	UOM	Price	
<input type="text" value=""/>	<input type="text" value="Quantity"/>	<input type="text" value="-1.0"/>	<input type="text" value="Pièce / Each"/>	<input type="text" value="1,000.00"/>	1,000.00 ✖
PO Line	Contract	Supplier Part Number			
<input type="text" value="342345-1"/>	<input type="text" value="Service Contract"/>	<input type="text" value=""/>			
Billing	<input type="text" value="2300-2302100015-3000"/>				

+ Add Line + Pick lines from Contract Totals & Taxes

7.4 CREATE A CREDIT NOTE

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

9 **Totals & Taxes**

Lines Net Total	1,000.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/>
Total Tax	0.00
Net Total	1,000.00
Total	1,000.00

10 **Delete** **Cancel** **Save as Draft** **Calculate** **Submit**

7.2 CREATE A CREDIT NOTE

Create a credit note

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.

1

Are You Ready to Send?

You're about to send an credit note to [REDACTED] for a total amount of -1,000.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.

3

Continue Editing Send Credit Note

7.2 CREATE A CREDIT NOTE FROM THE INVOICES TAB

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

CREATE INVOICES

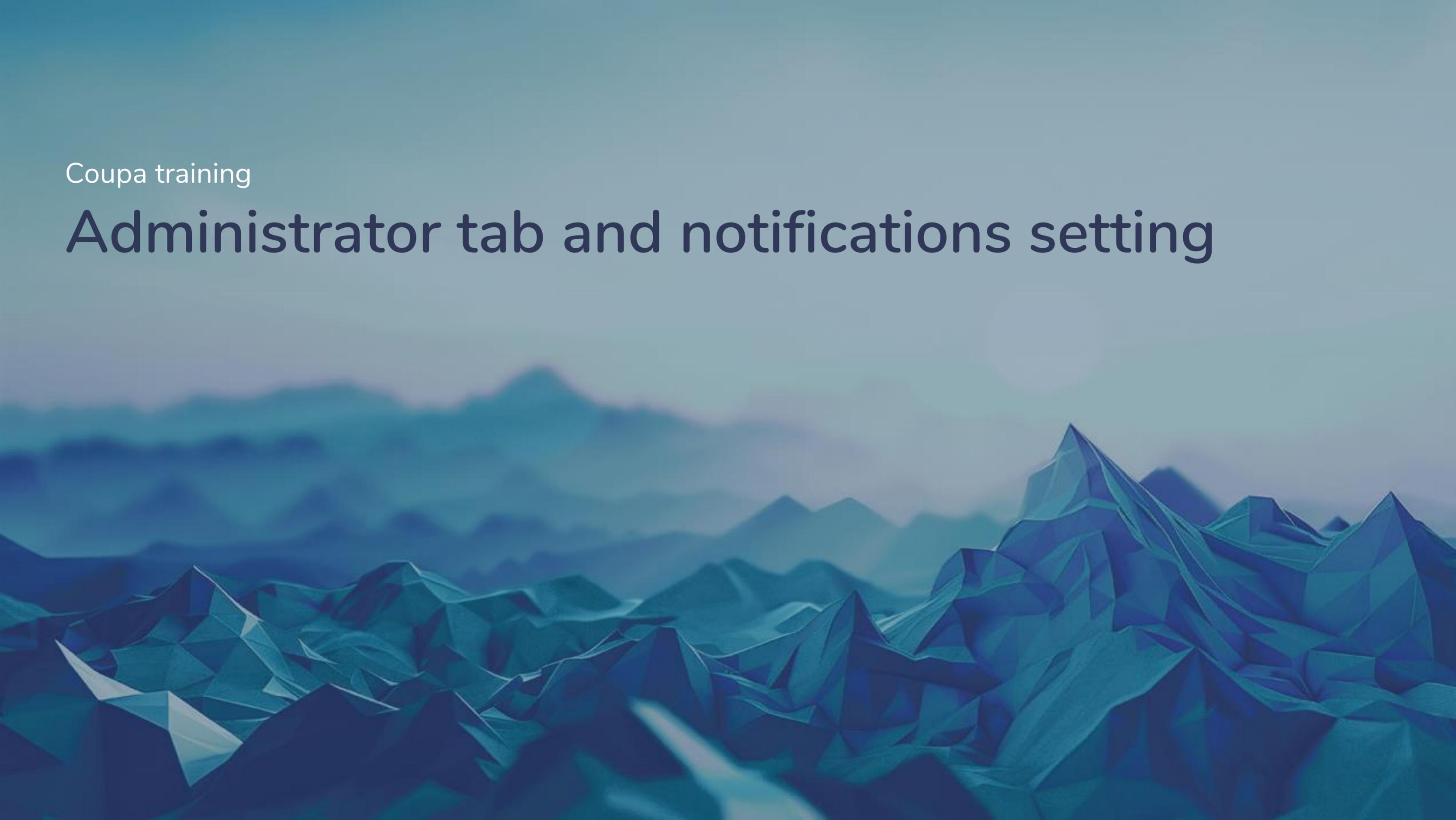
Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

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



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

Users	Permissions	Customer Access
Paul Francia gcsuppliertest@gmail.com Status: Active	ASNs Admin Business Performance	Glencore Glencore Dev

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

Admin Users

Users

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

Merge Requests

Merge accounts and manage merge requests.

Legal Entity Setup

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.

Fiscal Representatives

Remit-To

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.

Terms of Use

Payment Preferences ▾

Static Discounting

Option not available

SFTP Accounts

Option not available

cXML Errors

Option not available

SFTP Errors

Option not available

Coupa training

Manage notifications



Notification management

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

The screenshot displays the 'My Notifications' page in the Coupa Supplier Portal. The page header includes the Coupa logo and 'supplier portal' text. The user is identified as 'PHUMUDZO' and has 4 notifications. The navigation menu includes: Invoices, Orders, Profile, Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More... The main content area shows a 'View' dropdown set to 'All'. A 'Notification Preferences' button is located in the top right corner of the notification list. The notification list contains the following items:

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	Expired: G42 TEST cancelled their request. If you'd like to work with them, please contact them to ask for the form.	07/14/24 07:01 AM
<input type="checkbox"/>	New PO 2014-000442 for 5,250.00 issued by G42 TEST.	06/13/24 08:43 AM
<input type="checkbox"/>	You are now connected to G42 TEST	06/13/24 08:35 AM
<input type="checkbox"/>	Update your profile for G42 TEST	06/13/24 08:35 AM
<input type="checkbox"/>	POPIA Compliance (Samancor Chrome QA - WendyUAT112) For requests for access to and amendment of personal information or reporting of complaints and susp	04/17/23 10:32 AM

At the bottom of the notification list, there are two buttons: 'Delete' and 'Mark as Read'.

9.2 ADJUST NOTIFICATIONS

Notification management

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.

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

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

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email: phumudzochauke11@grr Mobile(SMS): +1 Verify

! Verify number to receive SMS

Account Access			
Merge Request	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Request to Join	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

Cancel Save

Coupa training

10. Sourcing events

11. Supplier Onboarding

12. Additional support

Coupa training

Sourcing events (RFQ, RFP)

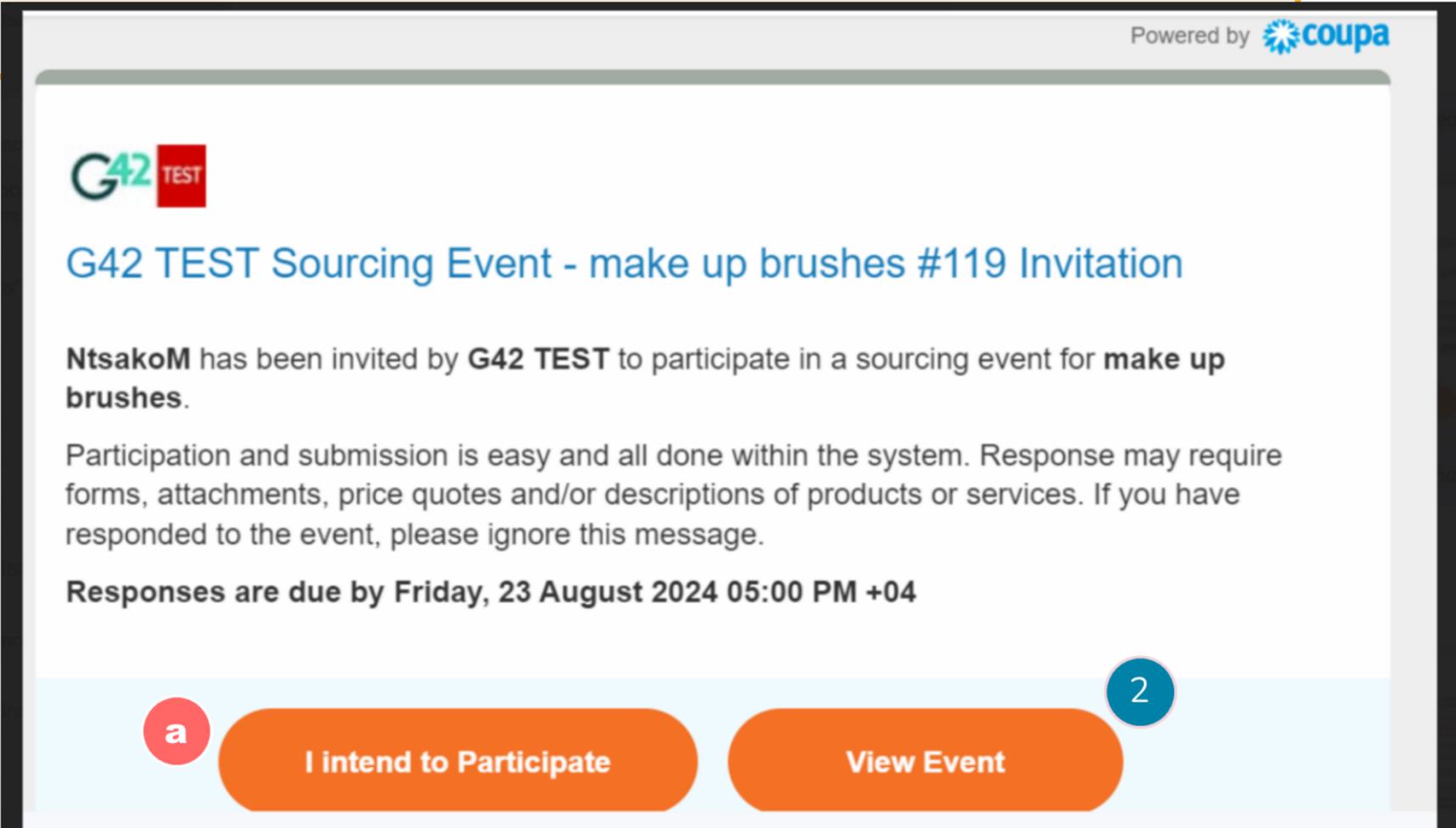
Respond to an invitation for a quotation or bidding event

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 RFP 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.

The screenshot shows the 'Event Info' section of a procurement system. At the top right, a blue box displays 'Event Ends 17:04' with 'days' and 'hrs' below it. Below this, the 'Event Info' section contains a message from 'G42 TEST' and a question 'Do you intend to participate in this event?' with a checkbox for 'I intend to participate in this event'. Below that is the 'Accept Terms and Conditions' section, which is currently empty. The 'Event Information & Bidding Rules' section shows 'Event will end at the Event End Time.', 'Responses are sealed until event closes', and 'Buyer may choose to award individual line items'. The 'Timeline' section shows a start time of '12:26 PM Asia/Dubai' on 'Aug 6' and an end time of '5:00 PM Asia/Dubai' on 'Aug 23'. A blue 'Enter Response' button is located at the bottom right.

102 EVENT INFORMATION

Event information

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.

5

Timeline

Aug 19 Event Start 08:00 AM Africa/Johannesburg 23h : 56min

Aug 20 Event End 07:57 AM Africa/Johannesburg 00:00

7 Enter Response

6

Instant Messages

Search

Type new message

Having Technical Issues? Contact sourcing.support@coupa.com Send Message

Response to the event

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.

The screenshot shows a web interface for responding to an event. At the top right, there is a blue box indicating 'Event Ends 23:50' with 'hrs' and 'mins' labels. Below this, there are three numbered callouts:

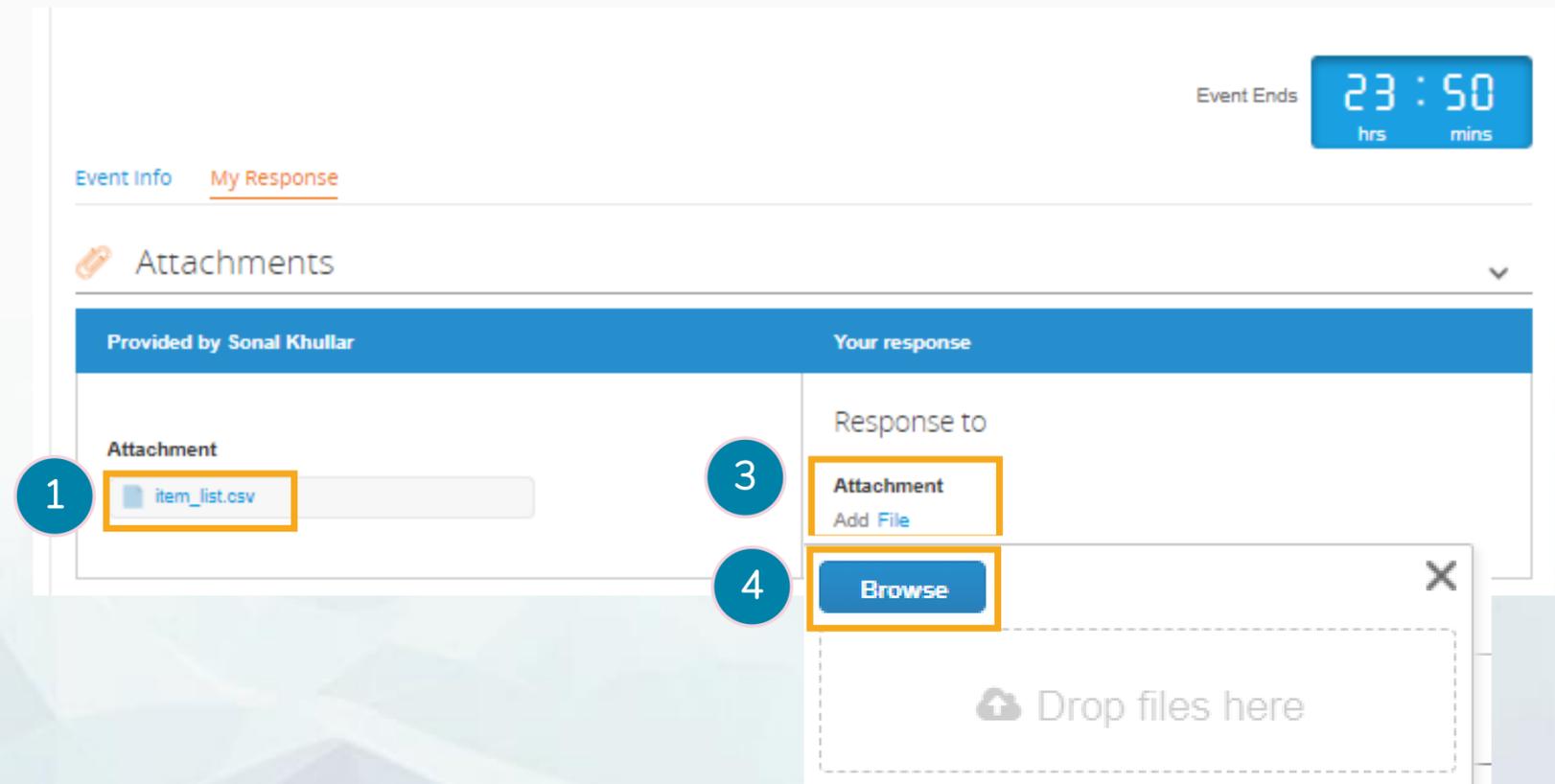
- Callout 1: Points to the 'My Response' tab, which is highlighted in orange.
- Callout 2: Points to the 'Attachments' section, which is also highlighted in orange. It shows a list of attachments provided by 'Sonal Khullar', including a file named 'item_list.csv'.
- Callout 3: Points to the 'Your response' section, which is highlighted in blue. It contains a 'Response to' field, an 'Attachment' section with an 'Add File' button, and a text area for the response.



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

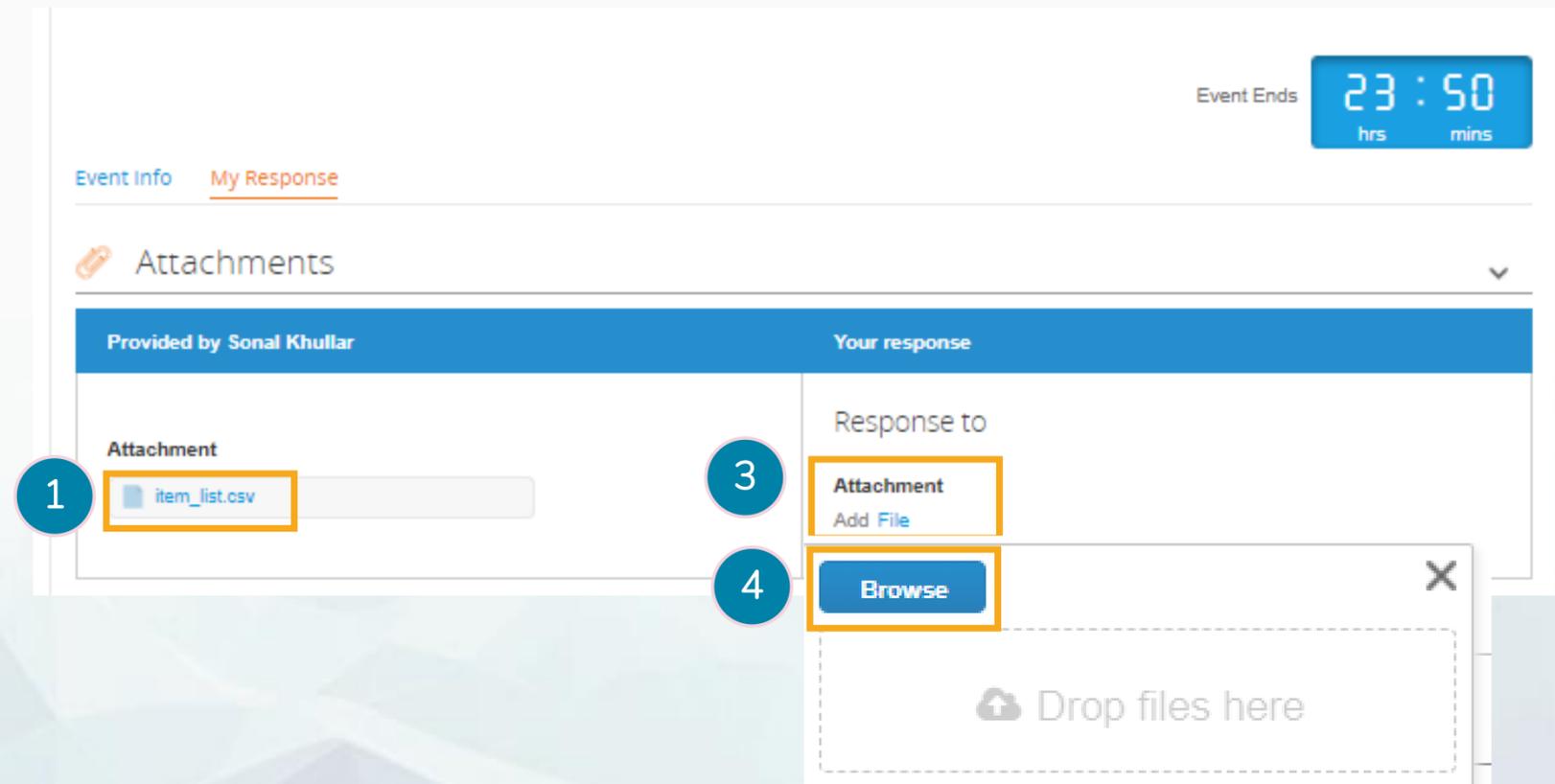
- 1 In the information section provided by the buyer, select the attached files to download them.
- 2 You will need to complete the requirements and save them to your computer.
- 3 To upload your files in the section of *Your response*, click Browse and select the files you want to upload.
- 4 Attach 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.

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.

Send bid to quotation

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.

Event Ends 23:50
hrs mins

Event Info My Response

Items and Services

Items Not In Lots (1 items)

Catering Services			900.00 GBP
			Expected Quantity x Price per Unit
Expected Quantity	* Price per Unit	* Currency	
10 Hour	90	GBP	

* Required field

Total 900.00 GBP

History

I have reviewed the changes to this event

Import from Excel Save **Submit response**

Coupa training

Supplier onboarding



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

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

The screenshot shows an email interface with the following content:

- Header: "1 Update your profile for G42 TEST" with an "Inbox x" label.
- Sender: "Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com> to me".
- Subject: "coupa Update your profile for G42 TEST".
- Body text: "Hello Supplier, G42 TEST wants you to respond by updating your company profile on Coupa. This information is required so that they can transact with you electronically. Use the 'Update Profile' button to respond or decline. G42 TEST".
- Action button: "2 Update Profile" (highlighted with a blue circle).
- Footer links: "Overview" (Learn more about the Coupa Supplier Portal), "Need help?" (Answers to common questions and issues), and "Coupa Info" (Learn more about how companies use Coupa).
- Bottom logo: "coupa".

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.

The screenshot displays the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is visible on the left, and user information 'PHUMUDZO', 'NOTIFICATIONS 4', and 'HELP' are on the right. A navigation bar includes 'Home', 'Inv', 'Orders', 'Profile' (highlighted with a blue circle and the number '1'), 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below this, a sub-navigation bar shows 'Your Profile', 'Information Requests' (highlighted with a blue circle and the number '1'), and 'Performance Evaluation'. The main content area is titled 'G42 TEST' and shows a 'Supplier Registration Questionnaire V5'. A dropdown menu for 'Profile' is set to 'G42 TEST - Test Supplier ONE'. Below the title, there are instructions: 'Use this form to send to a supplier to complete onboarding'. At the bottom of the form area, there are three buttons: 'Decline', 'Save', and 'Submit for Approval' (highlighted with a blue circle and the number '2'). Below the form is a 'Comments' section with a 'Mute Comments' dropdown and an 'Enter Comment' text area. At the bottom of the comment area, there is a link for 'Add File | URL' and a note: 'Send comment notification to a user by typing @name (ex. @JohnSmith)'.

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 customer's SIM form.

4 There are multiple required fields that have been determined by the G42. These fields will have a red asterisk next to the question.

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, there are user details: 'PHUMUDZO', 'NOTIFICATIONS 4', and 'HELP'. Below the navigation bar, there are tabs for 'Your Profile', 'Information Requests', and 'Performance Evaluation'. The main content area displays 'G42 TEST' and a dropdown menu for 'Profile' set to 'G42 TEST - Test Supplier ONE'. Below this, it says 'Supplier Registration Questionnaire V5' and 'Use this form to send to a supplier to complete onboarding'.

This close-up shows two required fields. The first is labeled '* Language' with a red asterisk and a 'Select' dropdown menu. The second is labeled '* Industry' with a red asterisk and another 'Select' dropdown menu.

This close-up shows two sections of the form. The first section is titled 'Remit-To Addresses' and includes the instruction: 'Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.' Below this is an 'Add Remit-To' button. The second section is titled '* Bank Details' and contains several input fields: 'Active' (dropdown set to 'Active'), 'Bank Name' (text input 'Common Wealth'), 'Beneficiary Name' (text input 'UAT testing'), 'Bank Account Number' (text input '*****848'), 'SWIFT Code (BIC)' (text input), 'BSB Number' (text input '***203'), 'Sort Code' (text input), 'Bank Address' (text input), and 'Account Currency' (dropdown set to 'AUD'). There are information icons (i) next to the Bank Account Number, SWIFT Code (BIC), BSB Number, and Sort Code fields. A red 'X' icon is in the top right corner of the Bank Details section.

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.

