“How To” G42 Supplier Portal

Coupa Supplier Portal Training

Objectives

In this module you will learn

1. Understand the vision of G42 Coupa procurement implementation
2. Understand functionalities of Coupa Supplier Portal (CSP)
3. Get familiar with the Coupa process and supplier benefits
4. Frequently asked questions & resources

Agenda

1. Why Coupa
2. Supplier Portal Login
3. Navigation and use of the portal
4. Administrator Tab & Notification Settings
5. Manage Notifications
6. Sourcing Events (RFQ/Tender)
7. Additional Support

Why Coupa

Benefits of Coupa Supplier Portal (CSP)

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.

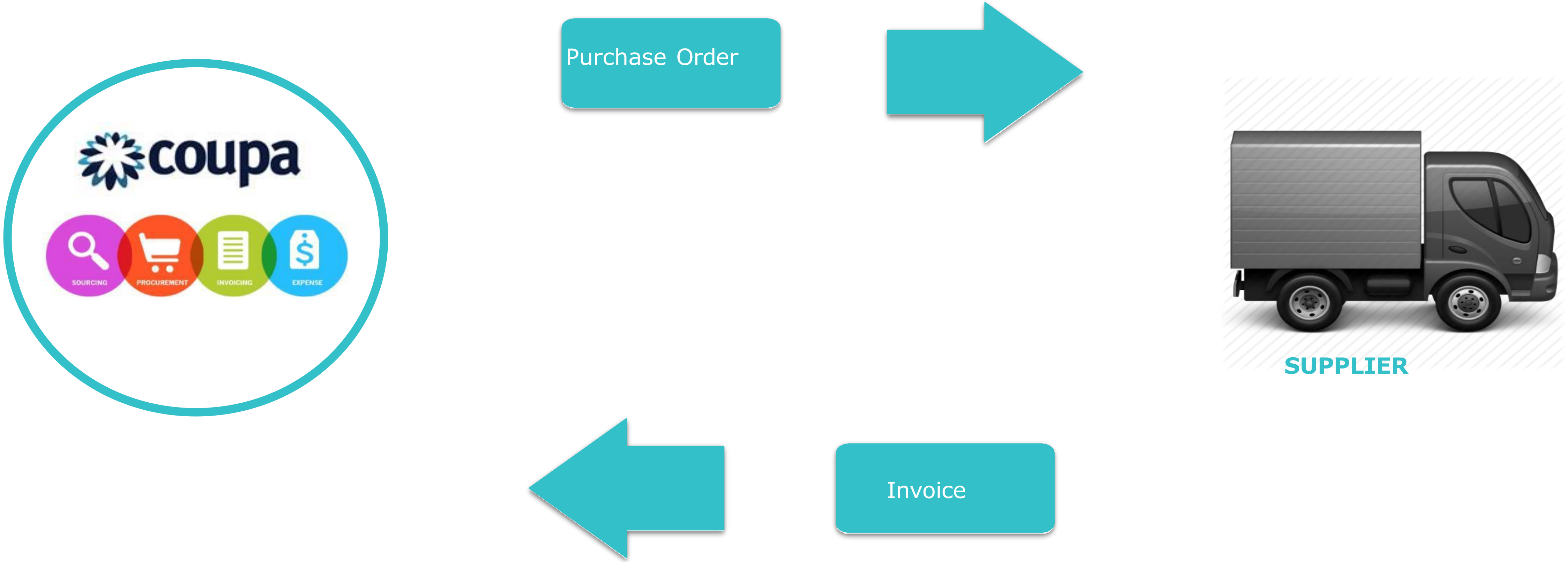
Coupa Functionalities

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 Supplier Network through CSP

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with customers
- 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 Supplier Portal Login

Coupa Supplier portal login

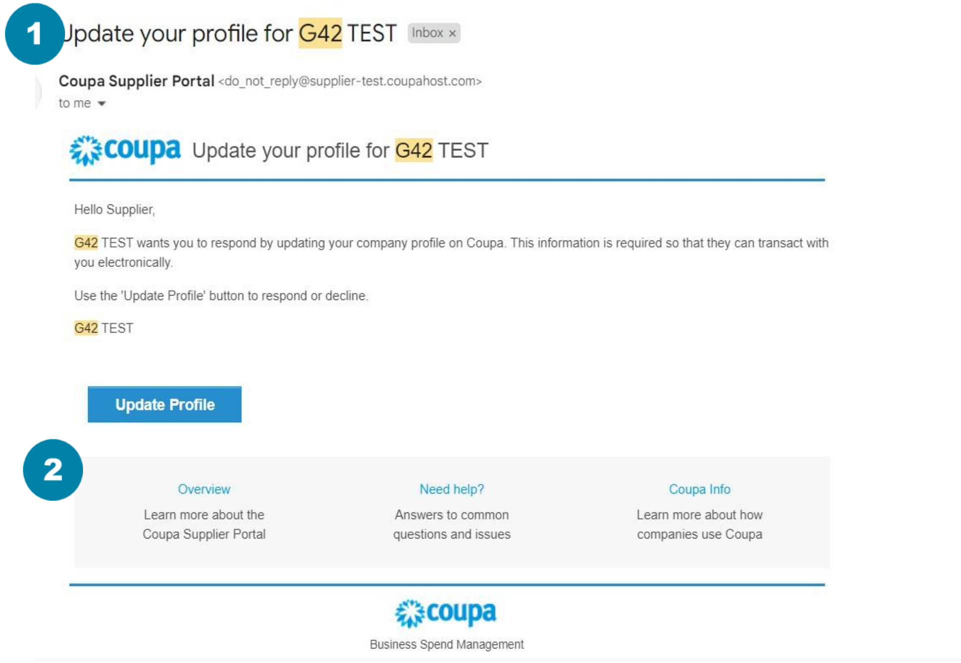
How to register and log in to the supplier portal

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 ×

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

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

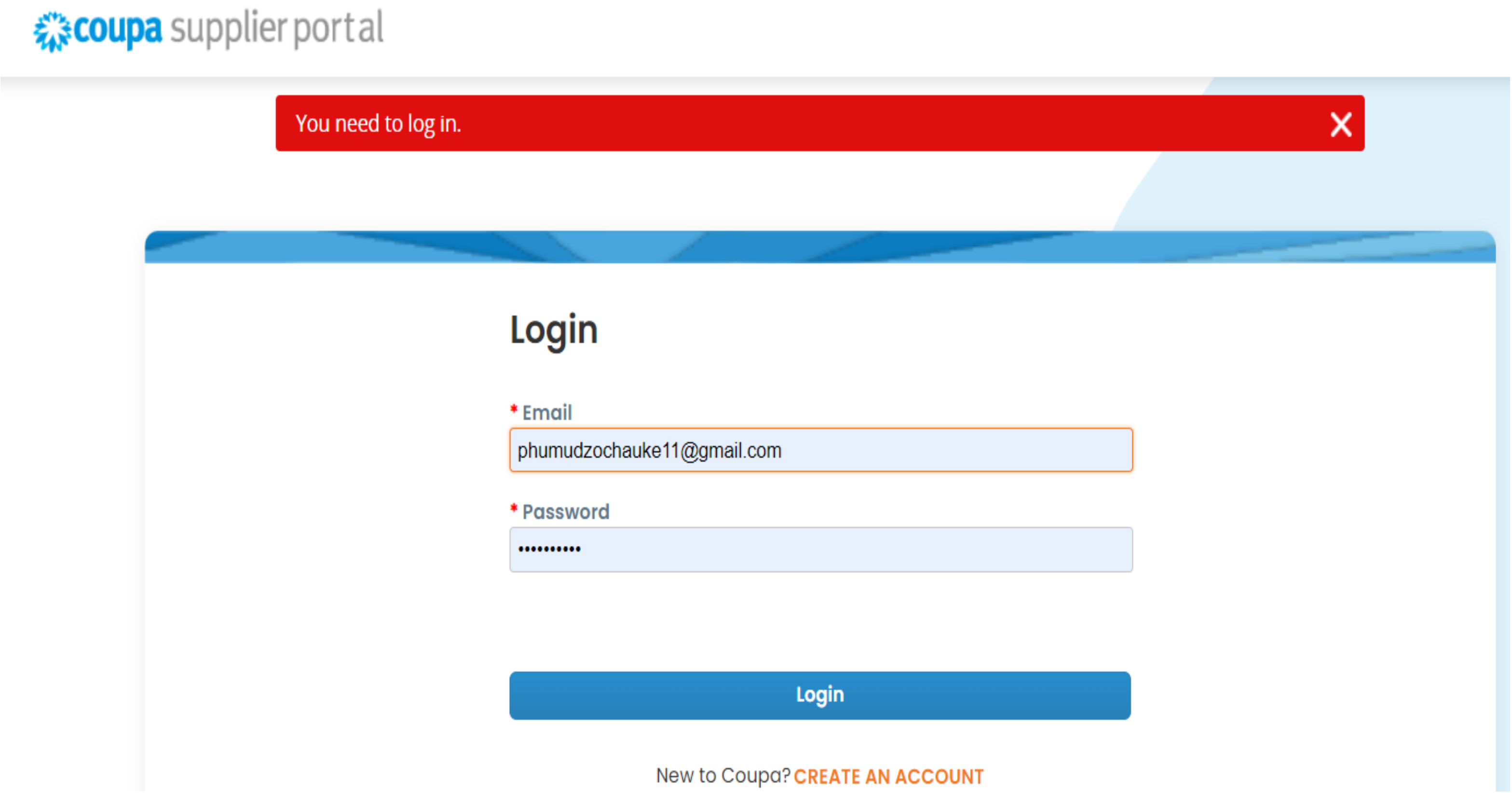
coupa
Business Spend Management

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

Coupa Supplier portal login

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.



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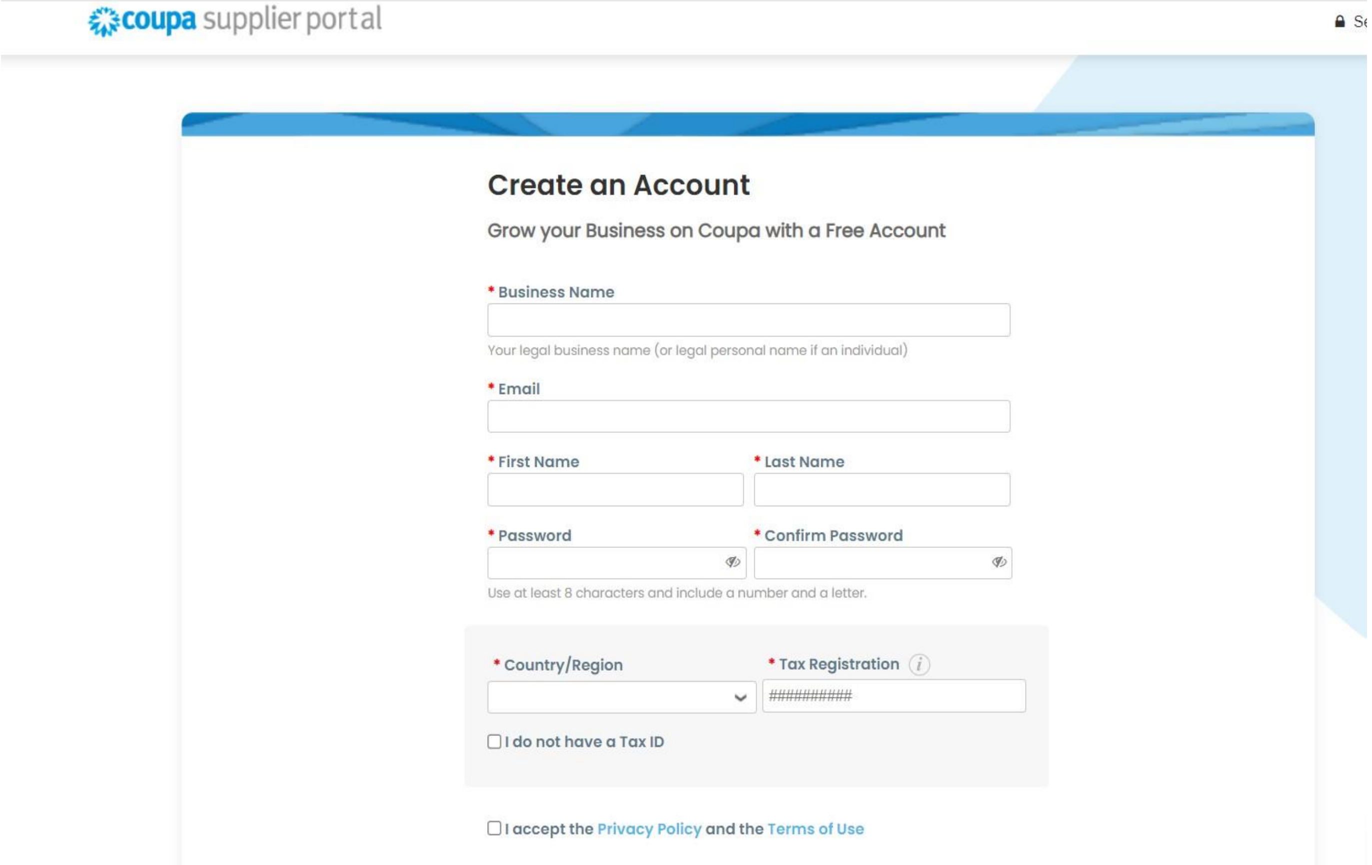
Coupa Supplier portal login

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)

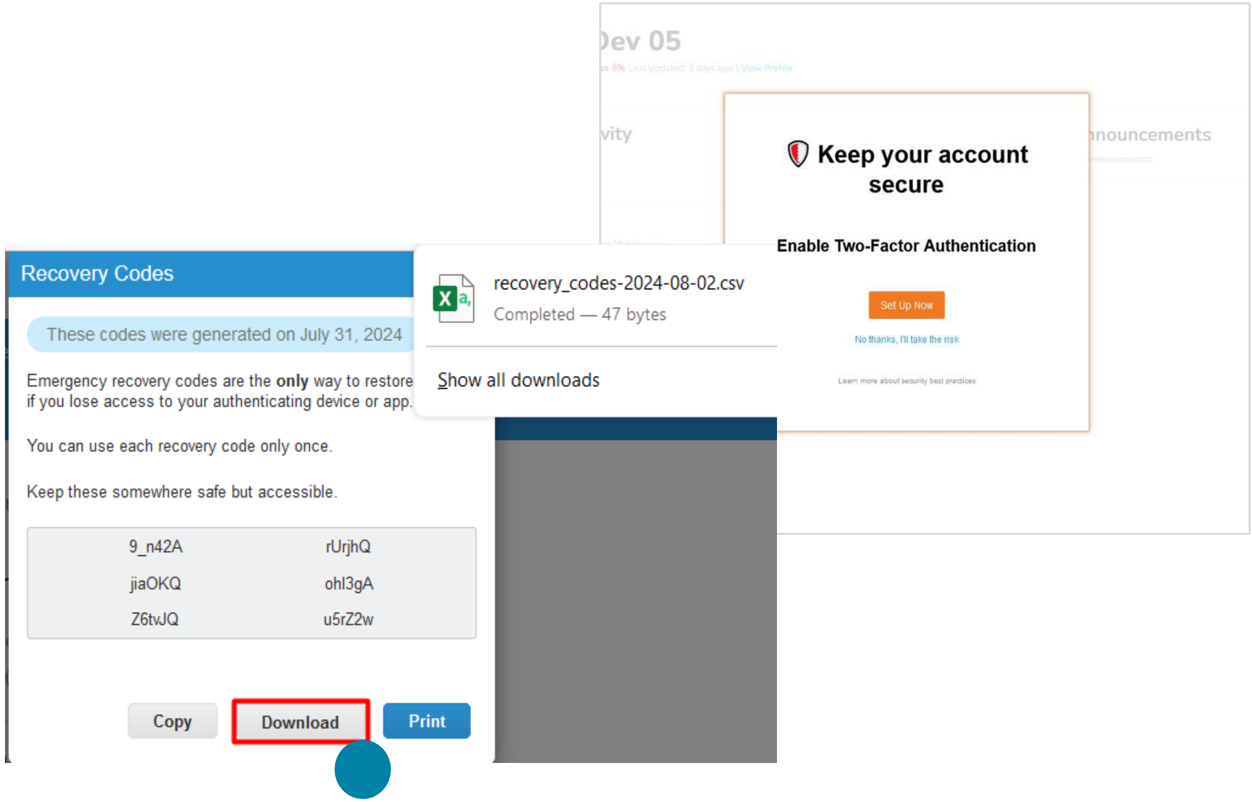


Coupa Supplier portal login

How to register and log in to the supplier portal

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

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.

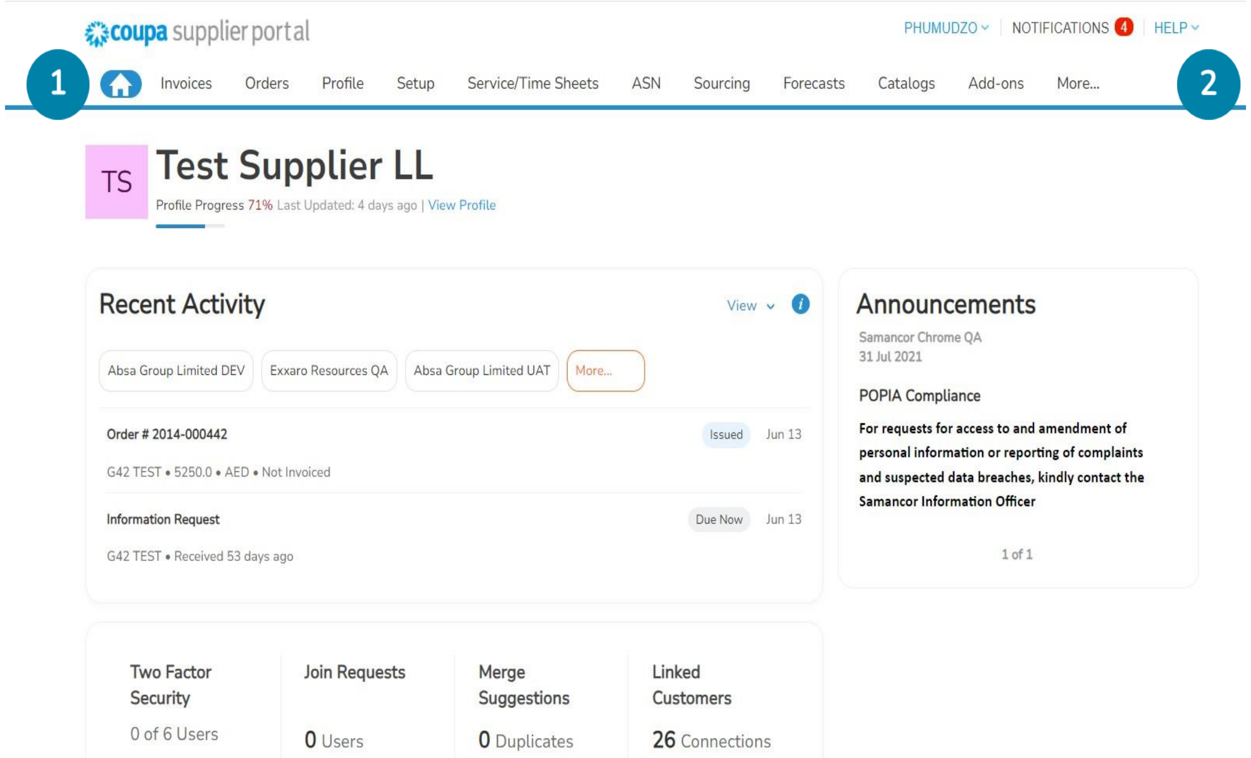
Navigation and use of Portal

Navigation and use of the supplier portal

How to navigate

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.

Navigation and use of the supplier portal

How to navigate

1 Announcements section where G42 will be informing about new developments.

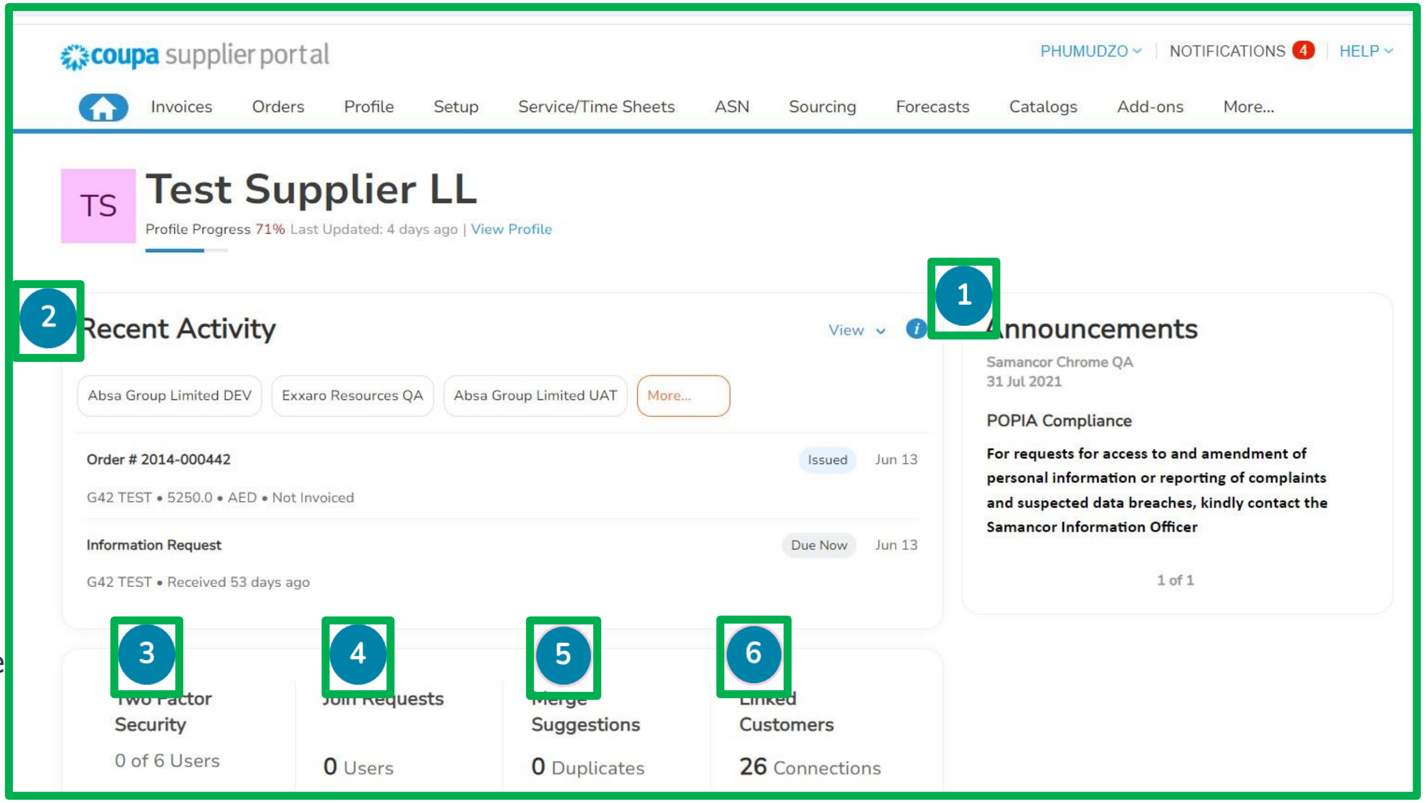
2 Recent activity will be listed here

3 Two-factor security information will be displayed here

4 Joint 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.

Navigation and use of the supplier portal

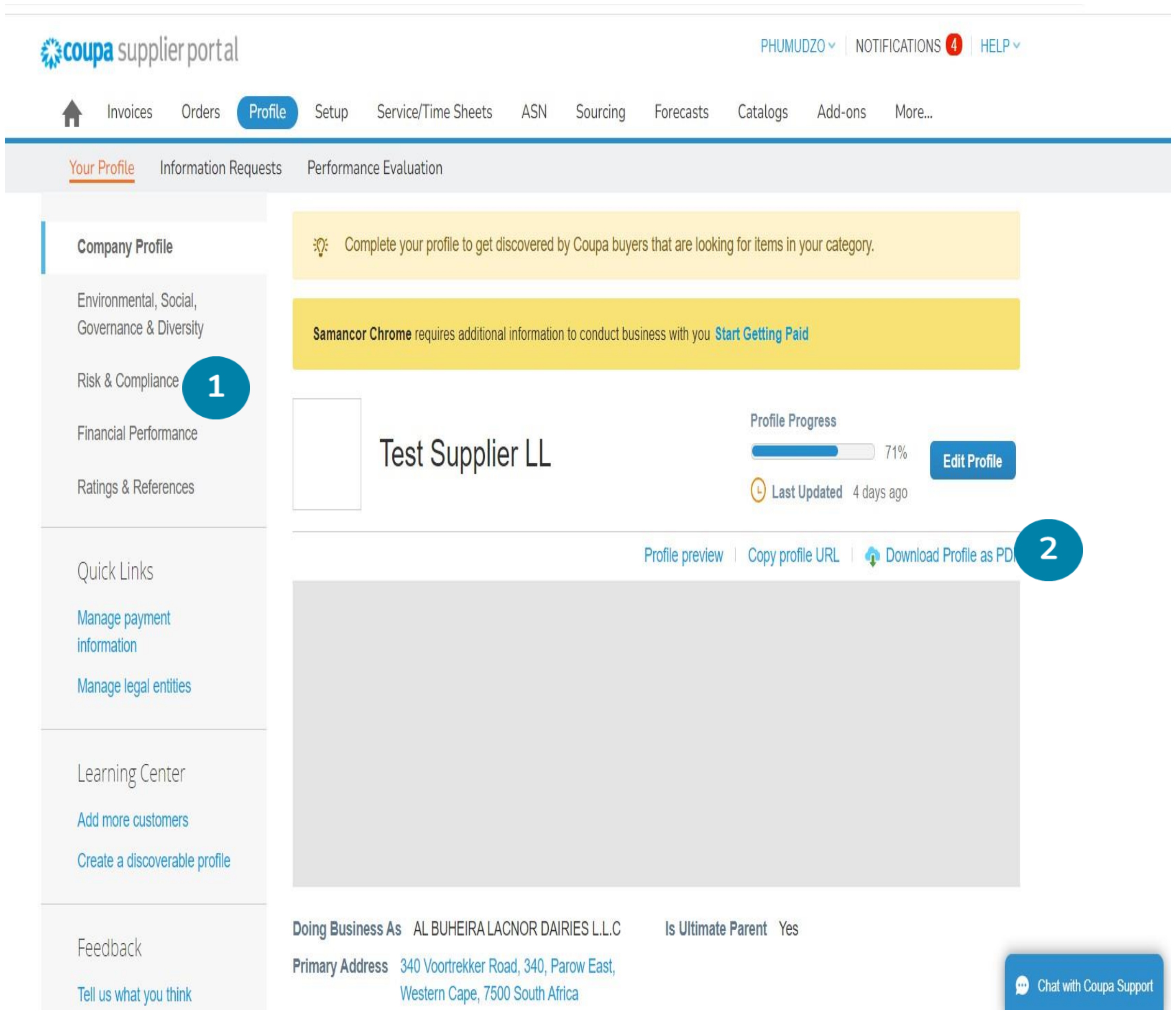
How to update Company Profile

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.

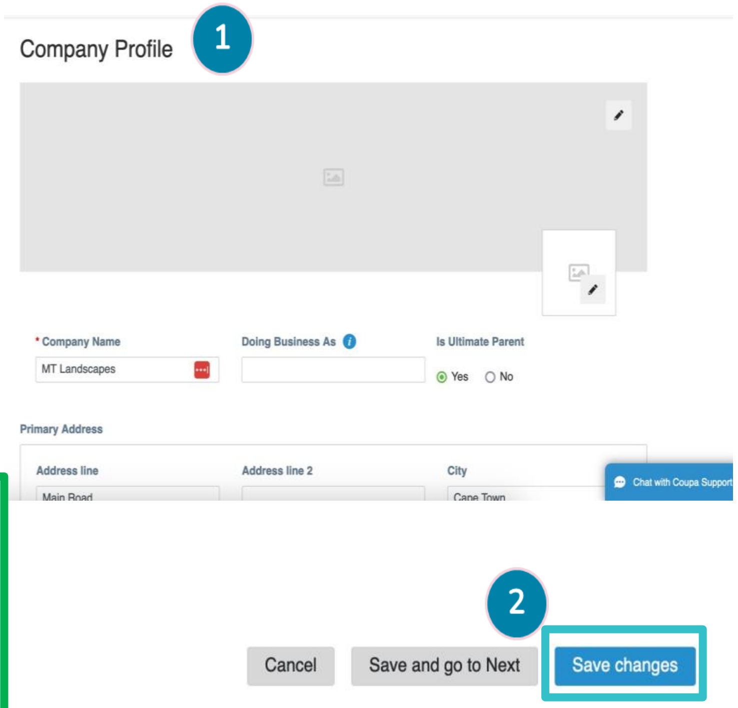


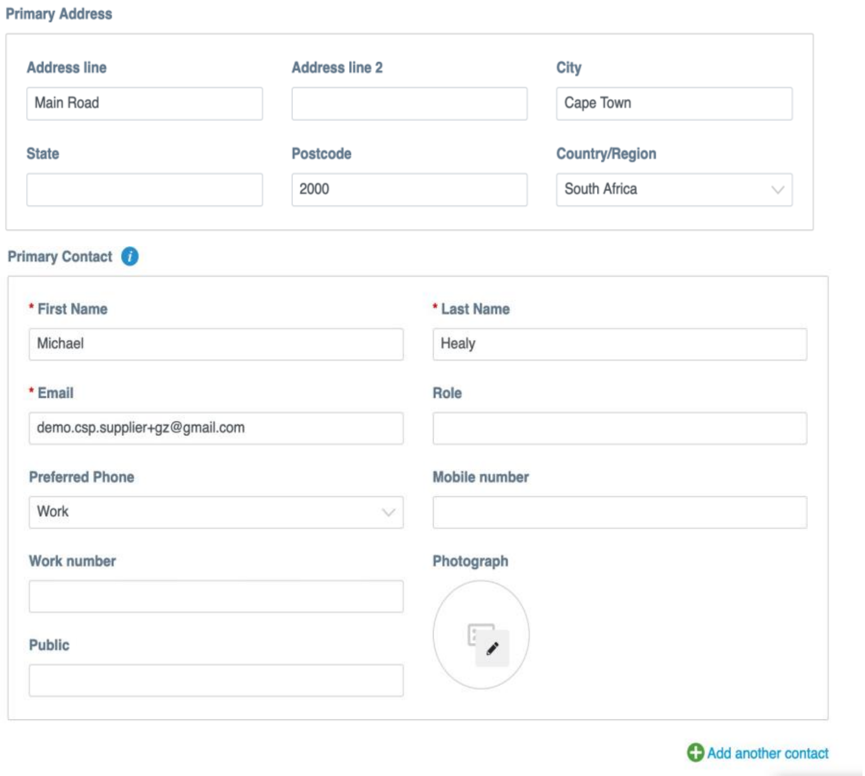
Navigation and use of the supplier portal

How to update Company 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



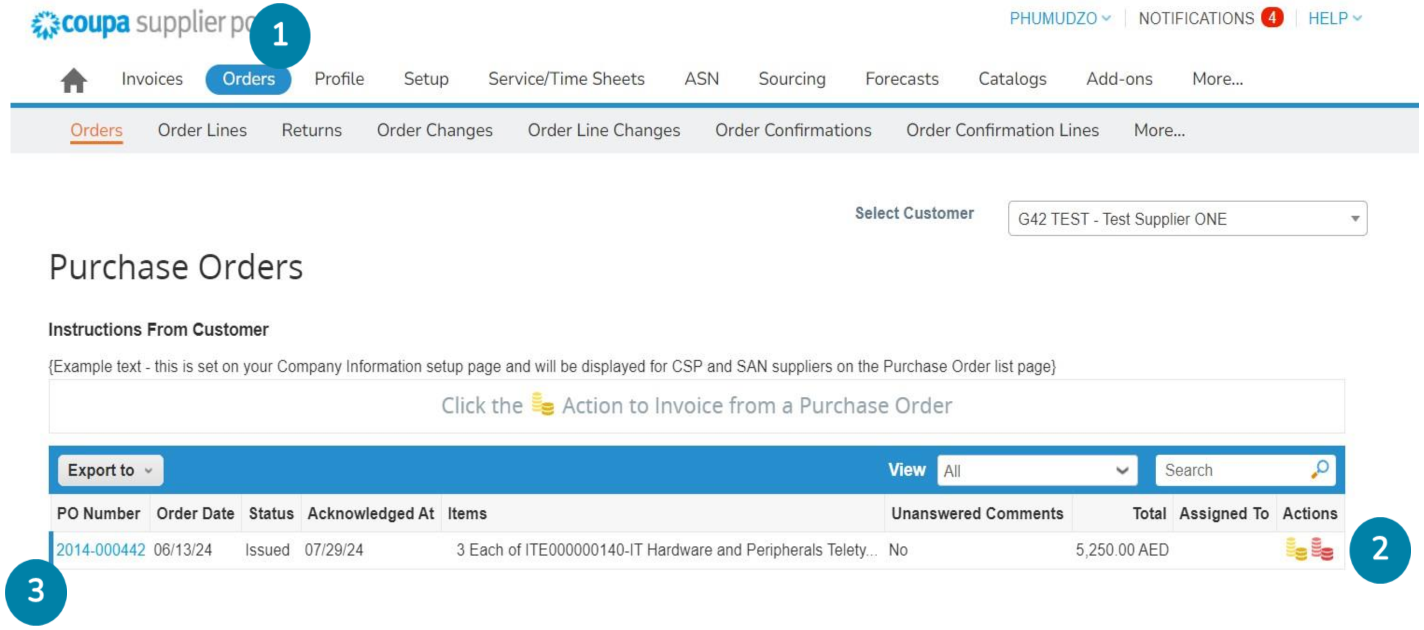


NOTE: The fields marked with an asterisk are mandatory, the others are required to have an updated profile. The legal entity field is related to your company.

Navigation and use of the supplier portal

How to View the Purchase Orders

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

Navigation and use of the supplier portal

How to View the Purchase Order details

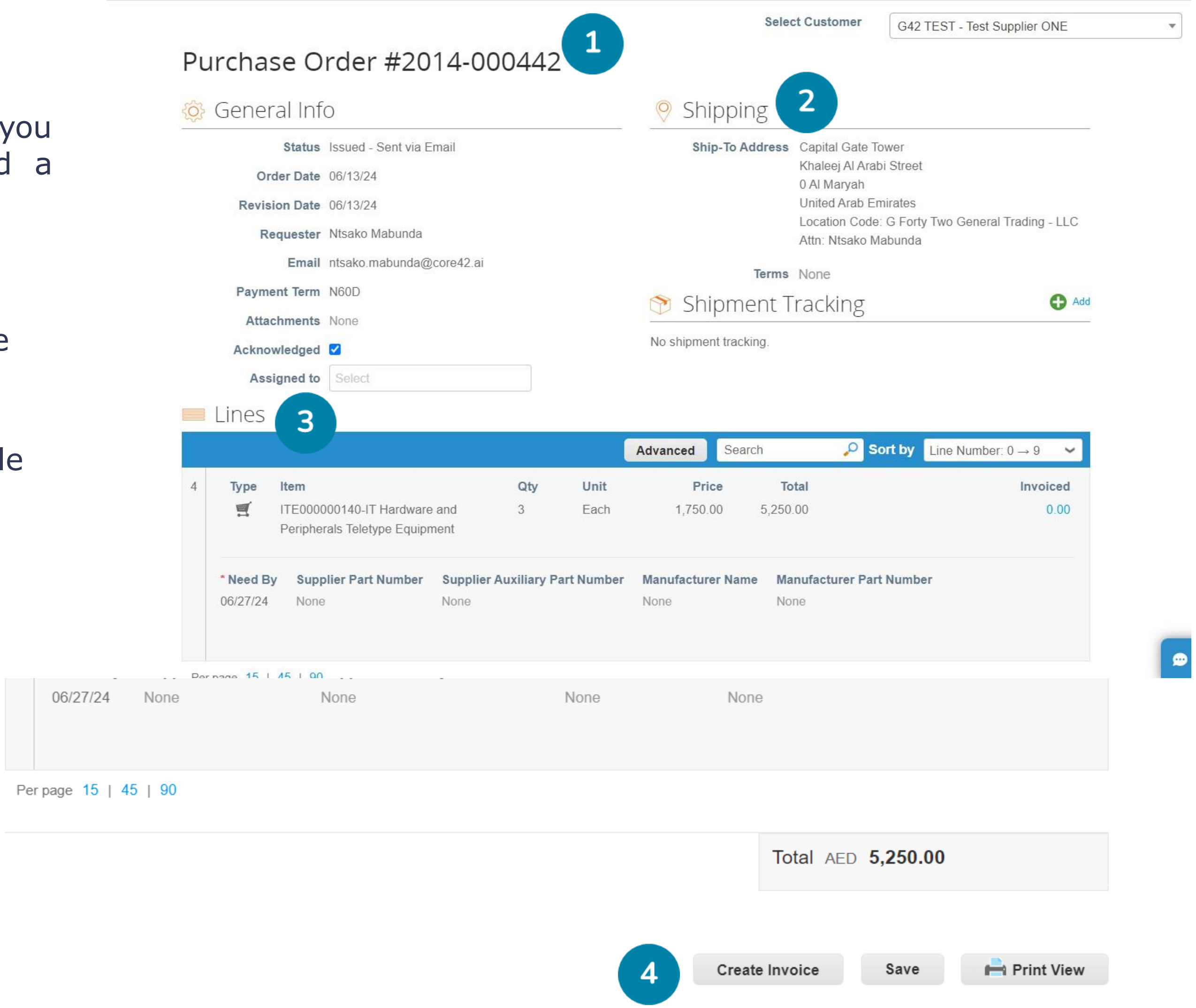
1. Once you have clicked on the Purchase Order number you wish to review, you will find the reference number and a description of the order.

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.



Navigation and use of the supplier portal

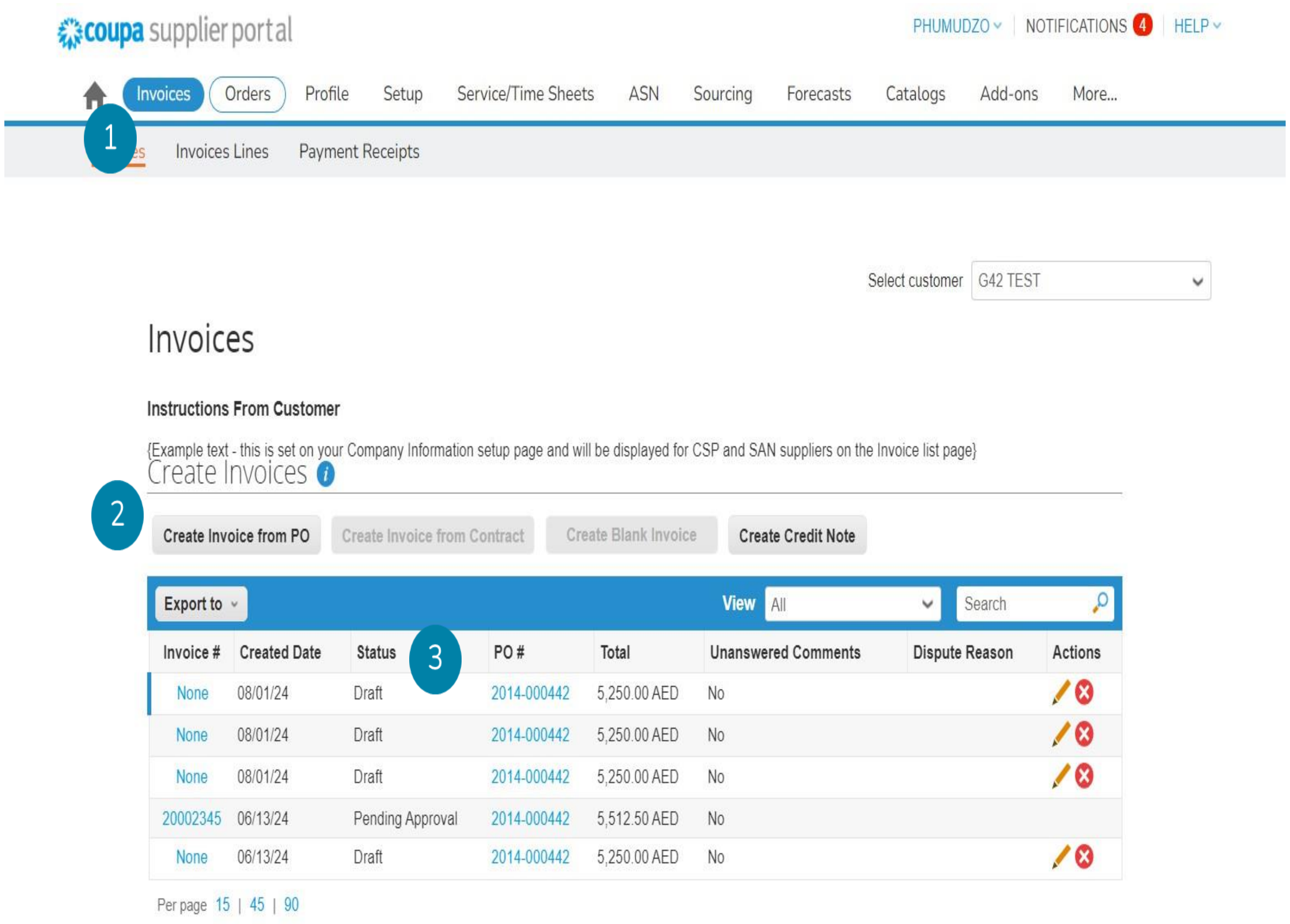
How to view the Invoices

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.

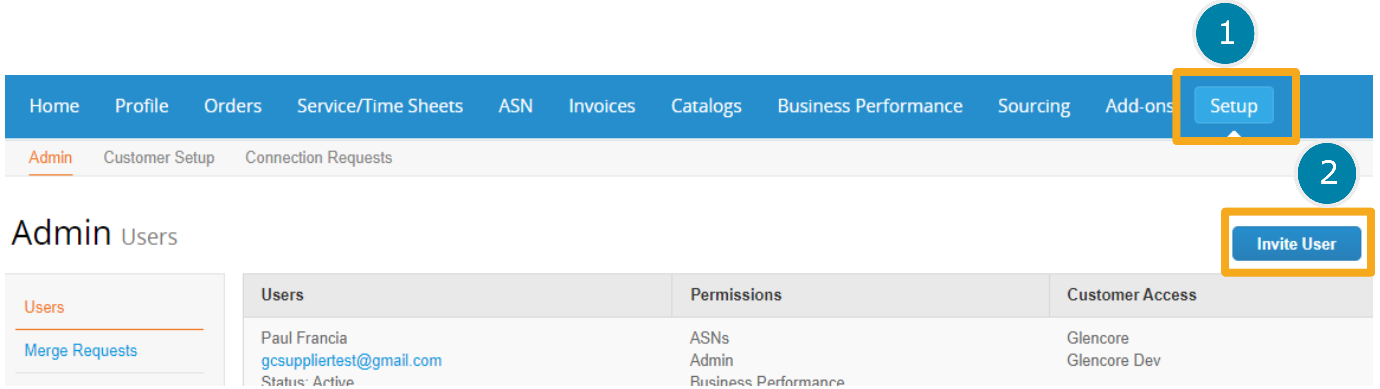
NOTE: 'Create Blank Invoice' and 'Create Invoice from Contract' options will only be allowed for selected suppliers.



Administrator Tab and Notification Settings

Administrator Settings and Notifications Settings

How to Manage Profile and add new users

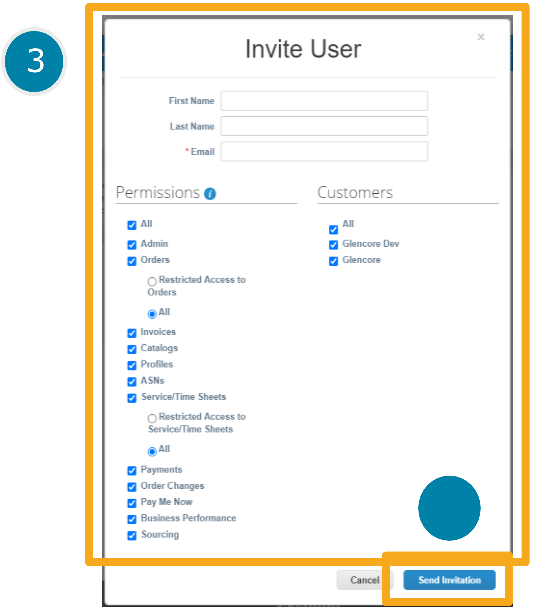


1 Go to the administrator tab on the right side of the portal.

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



Administrator Settings and Notifications Settings

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.
Fiscal Representatives	Add tax representatives in countries where you are not registered with a local address but need to be registered for tax purposes.
Remit-To	Provide the shipping address and associated tax information to meet compliance regulations when invoicing
Terms of Use	View and sign the terms of use for working with the Coupa portal.
Payment Preferences	
Static Discounting	Option not available
SFTP Accounts	Option not available
cXML Errors	Option not available
SFTP Errors	Option not available

Manage Notifications

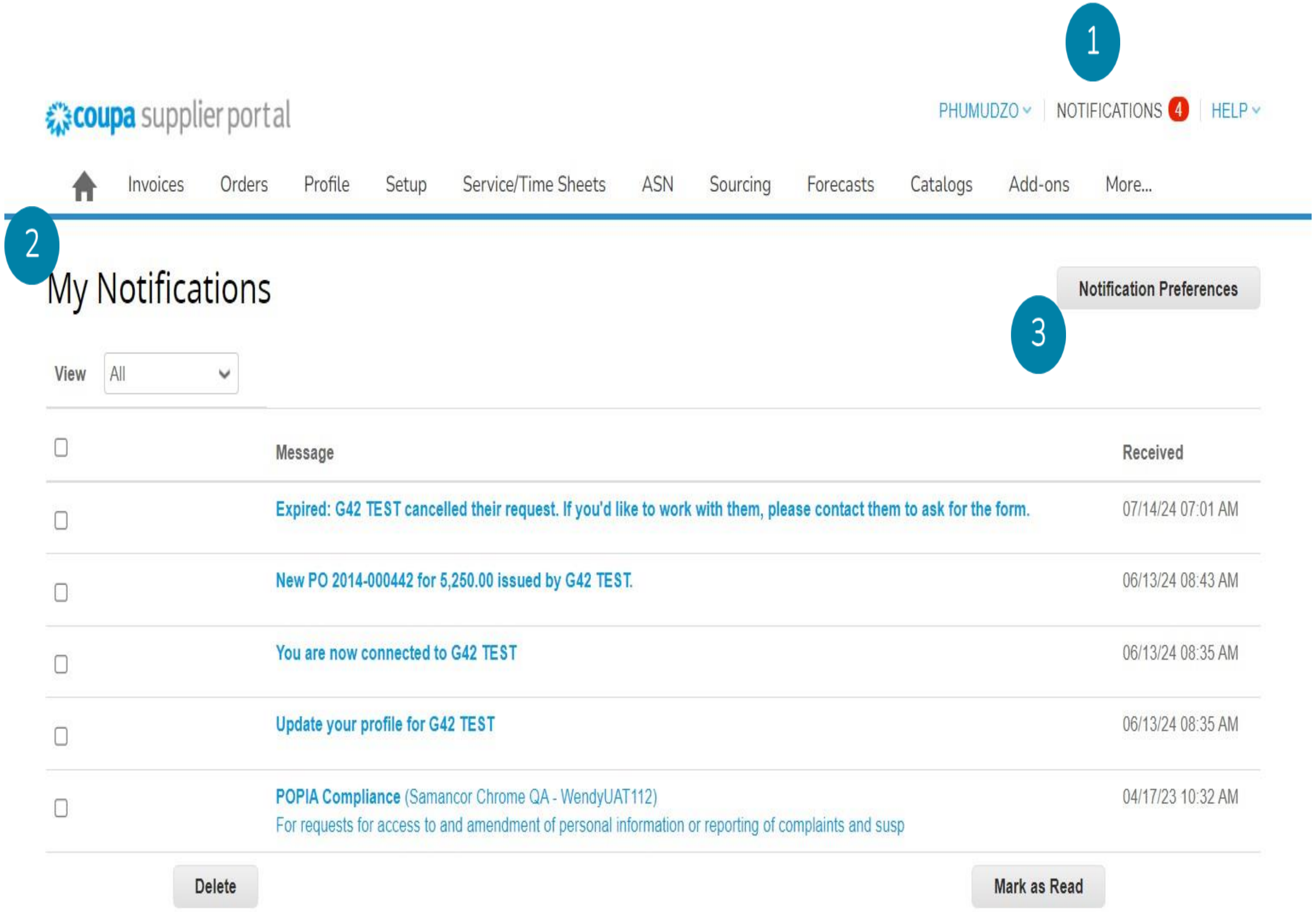
Manage Notifications

How to Manage Notifications

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



Manage Notifications

How to Manage Notifications

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

a Select account settings if you want to change the password

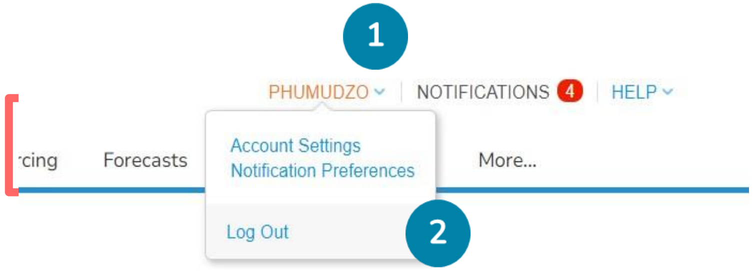
b Select notification preferences to adjust notifications.

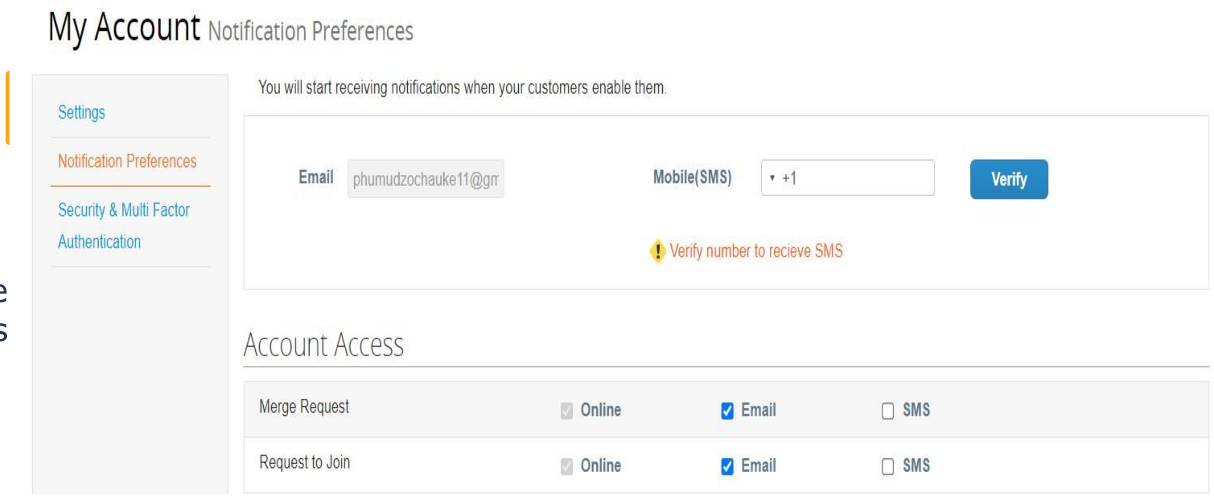
2 In the drop-down list you can manage the notifications according to your interests

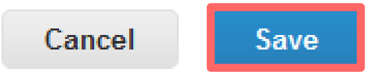
a Check the online option if you want receive online notifications. It is recommended that you always have this option activate.

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.







Sourcing Events (RFQ)

Respond to a Sourcing Event (RFQ/Tender)

How to Receive notification for RFQ

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.

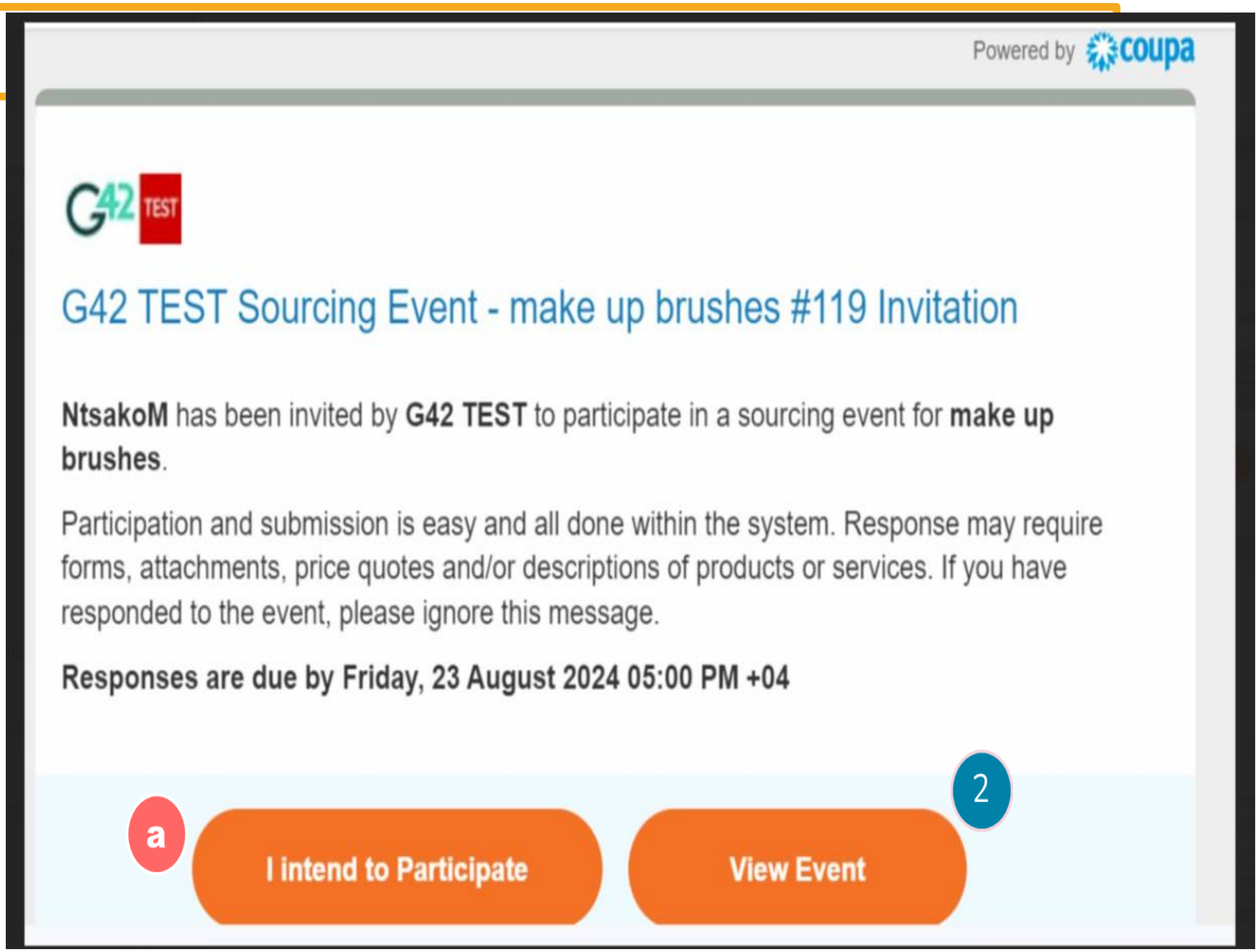
a. Select "I intend to participate" if you do not yet wish to enter the event but want to participate in the event at some point.

   G42 will be notified that you

   will participate.

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

1



Respond to a Sourcing Event (RFQ/Tender)

How to Participate to an event (RFQ/Tender)

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.

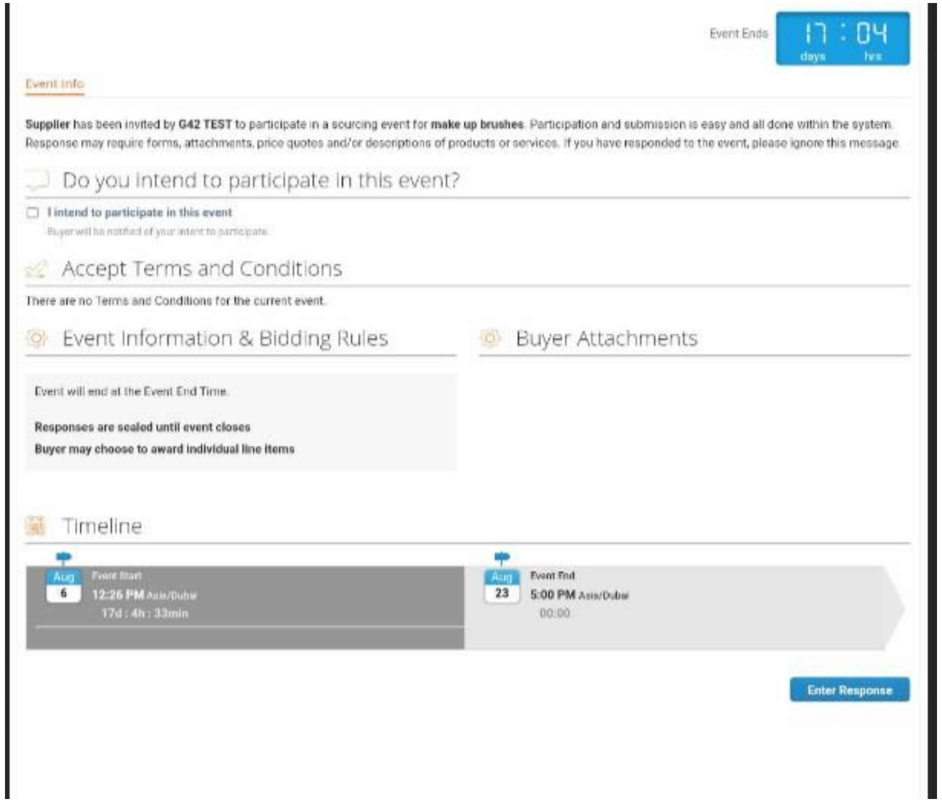
4. In the terms and conditions section you will find the corresponding information. You must accept the terms and conditions to continue

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

1

2

4



Respond to a Sourcing Event (RFQ/Tender)

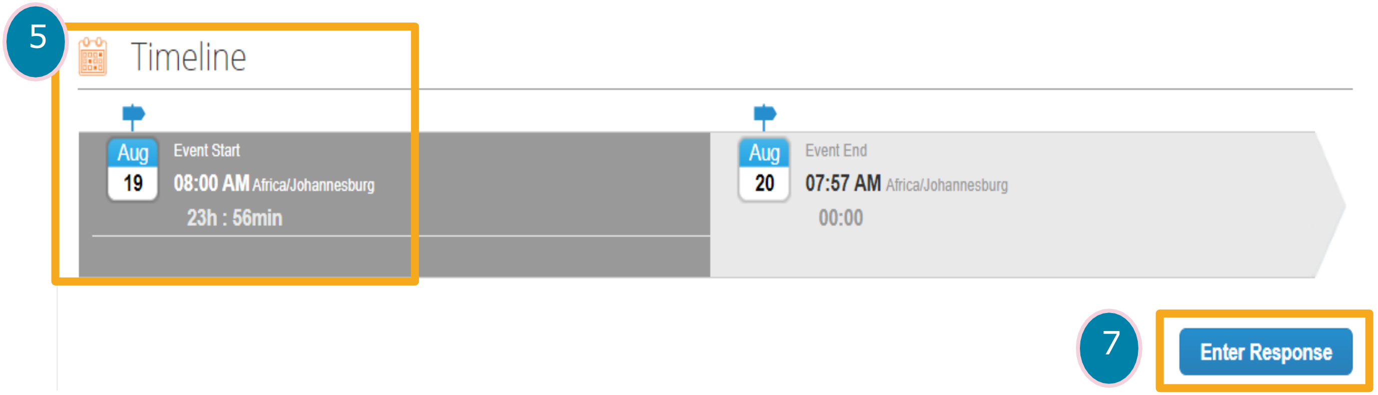
How to Participate to an event (RFQ/Tender)

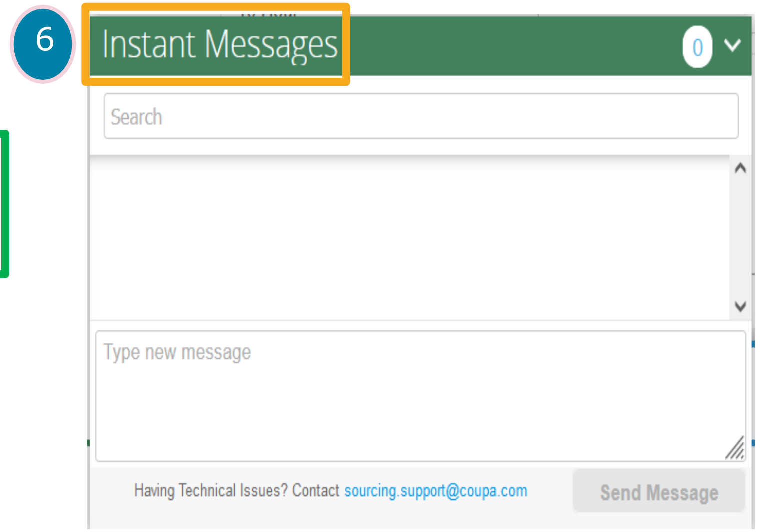
5 In the deadline section you will find the time of the event.

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.





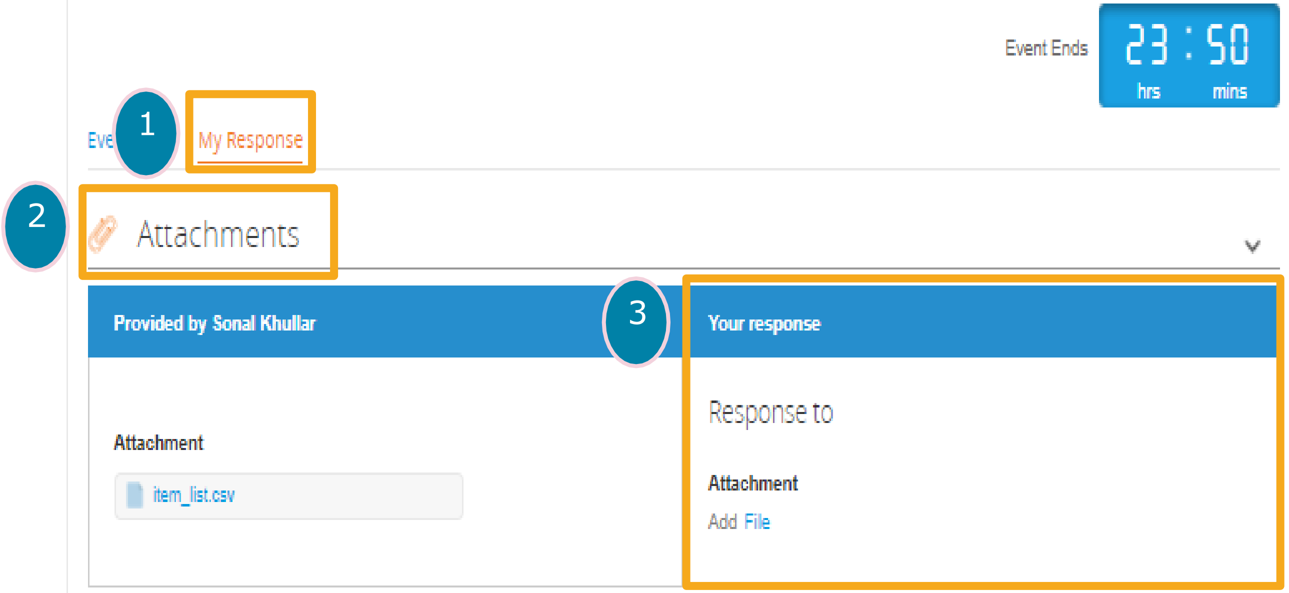
Respond to a Sourcing Event (RFQ/Tender)

How to Respond to an event (RFQ/Tender)

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

Respond to a Sourcing Event (RFQ/Tender)

How to Download and Upload Attachments

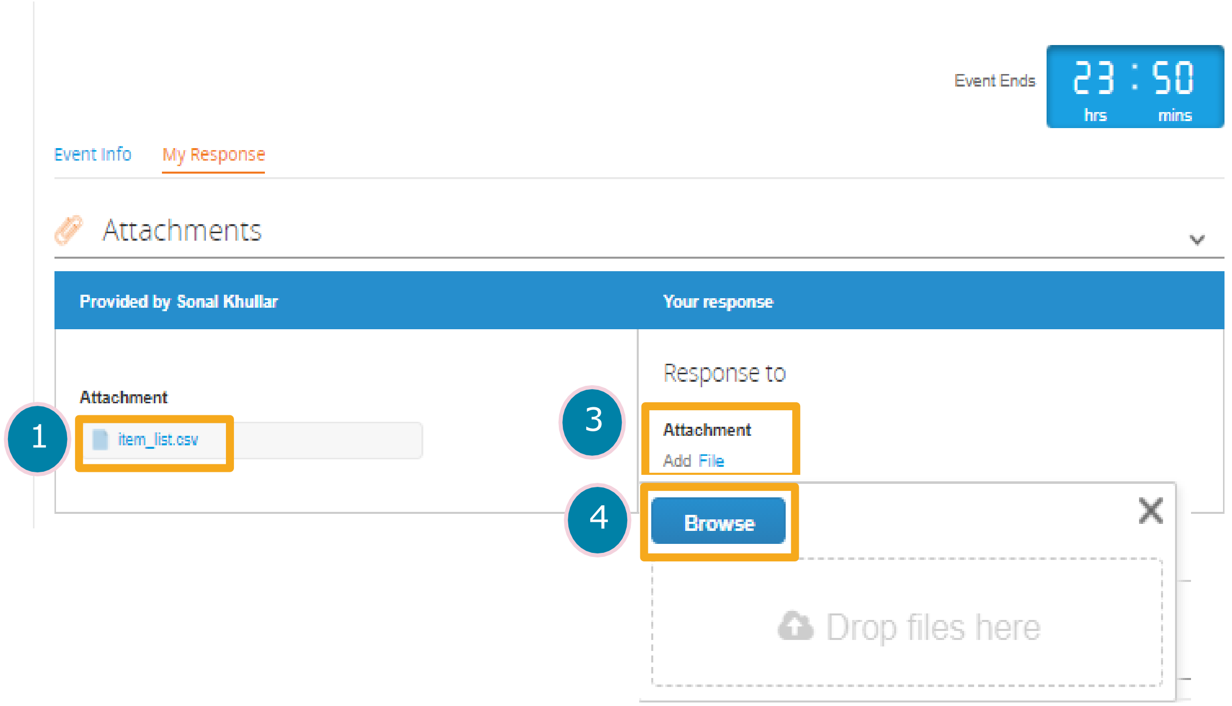
1. In the information section provided by the buyer, select the attached files to download them.

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.



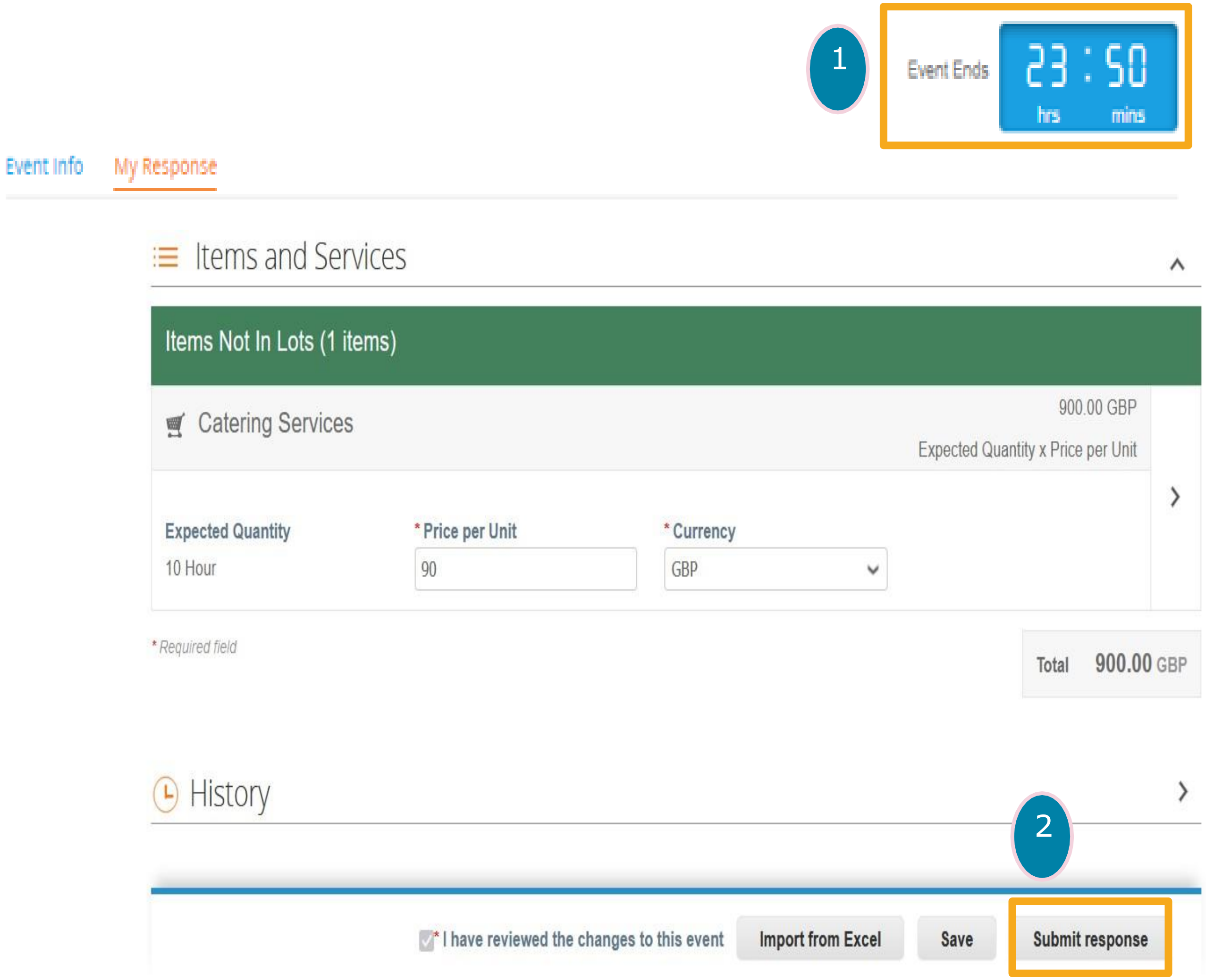
Respond to a Sourcing Event (RFQ/Tender)

How to send response

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.



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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

Dedicated to suppliers on success portal and available directly on CSP

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.

Dedicated to suppliers on success portal and available directly on CSP

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.

For any Support:
Please reach out to supplierregistration@g42.ai

Thank You