



Coupa Supplier Portal (CSP)

Supplier Training Guide

July 2019

Shanghai • 2019
Procurement Performance Team • APAC Hub Procurement

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Agenda

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Introduction to Coupa

Introduction to Coupa

What is Coupa?

Air Liquide has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic Purchase Order and Invoice (Except Air Liquide China Suppliers) transmission.

- Coupa is a leading e-Procurement platform, connecting buyers with their suppliers.
- “Coupa is an internet-based solution capable of accommodating a variety of different systems.” (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by Air Liquide to request indirect materials and services, as well as create and communicate Purchase Orders.
- The Coupa Supplier Portal (CSP) is free. There is no cost for suppliers.



Introduction to Coupa

How Will You Benefit?

By working with Air Liquide electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, be able to maintain a better presence with Air Liquide.

- Efficient Purchase Order receiving and acknowledgement
- Instant visibility to Purchase Order details
- Reduced manual paper transaction processing

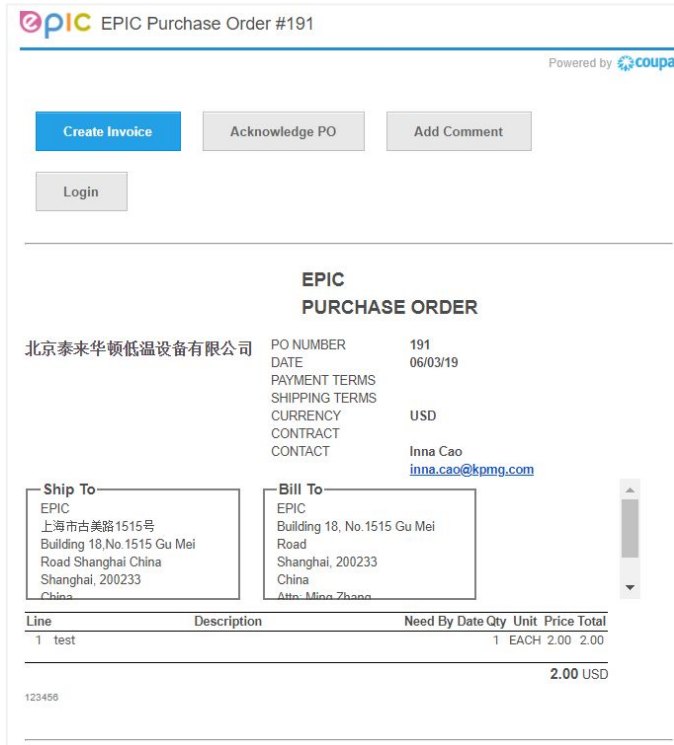


Introduction to Coupa

One System, Two Interaction Methods

As a supplier, you have two ways in which you can electronically interact with Air Liquide:

1. Through Supplier Actionable Notification (SAN)/Email



EPIC Purchase Order #191

Powered by Coupa

Buttons: Create Invoice, Acknowledge PO, Add Comment, Login

EPIC PURCHASE ORDER

北京泰来华顿低温设备有限公司

PO NUMBER: 191
 DATE: 06/03/19
 PAYMENT TERMS
 SHIPPING TERMS
 CURRENCY: USD
 CONTRACT
 CONTACT: Inna Cao, inna.cao@kpmg.com

Ship To
 EPIC
 上海市古美路1515号
 Building 18, No. 1515 Gu Mei Road
 Shanghai, China
 200233
 China

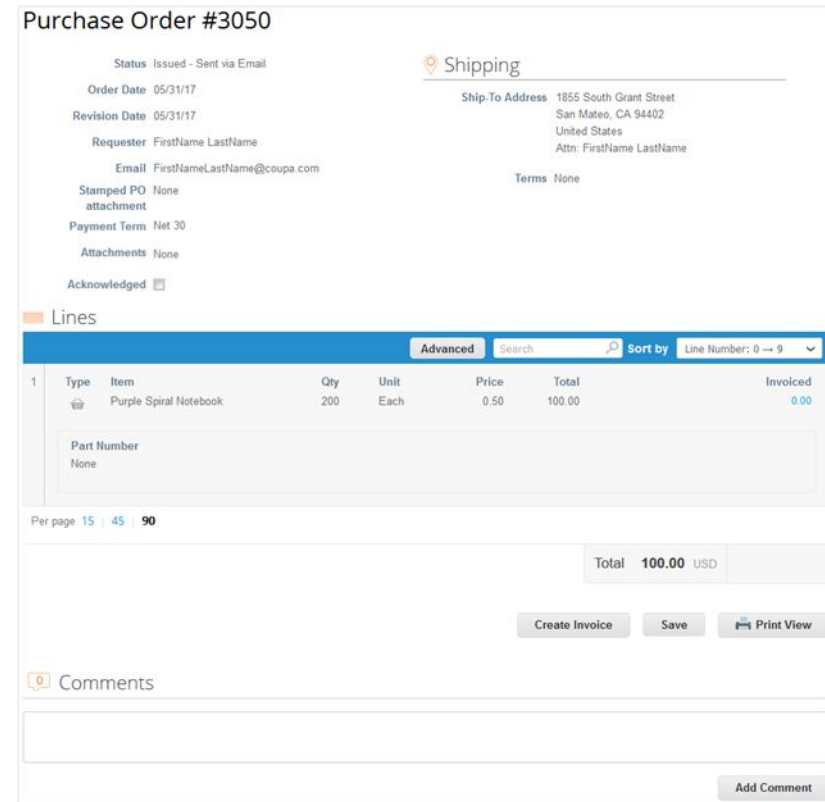
Bill To
 EPIC
 Building 18, No. 1515 Gu Mei Road
 Shanghai, 200233
 China
 Attn: Ming Zhang

| Line | Description | Need By Date | Qty | Unit | Price | Total |
|------|-------------|--------------|-----|------|-------|-------|
| 1 | test | | 1 | EACH | 2.00 | 2.00 |

123456

OR

2. Through Coupa Supplier Portal (CSP)



Purchase Order #3050

Status: Issued - Sent via Email

Order Date: 05/31/17
 Revision Date: 05/31/17

Requester: FirstName LastName
 Email: FirstNameLastName@coupa.com

Stamped PO attachment: None
 Payment Term: Net 30
 Attachments: None
 Acknowledged:

Shipping

Ship-To Address: 1855 South Grant Street
 San Mateo, CA 94402
 United States
 Attn: FirstName LastName
 Terms: None

Lines

Advanced Search Sort by Line Number: 0 → 9

| 1 | Type | Item | Qty | Unit | Price | Total | Invoiced |
|---|------|------------------------|-----|------|-------|--------|----------|
| | | Purple Spiral Notebook | 200 | Each | 0.50 | 100.00 | 0.00 |

Part Number: None

Per page 15 | 45 | 90

Total: 100.00 USD

Buttons: Create Invoice, Save, Print View

Comments

Add Comment



Registration and Setup

Registration and Setup

Transactions in Coupa Via CSP

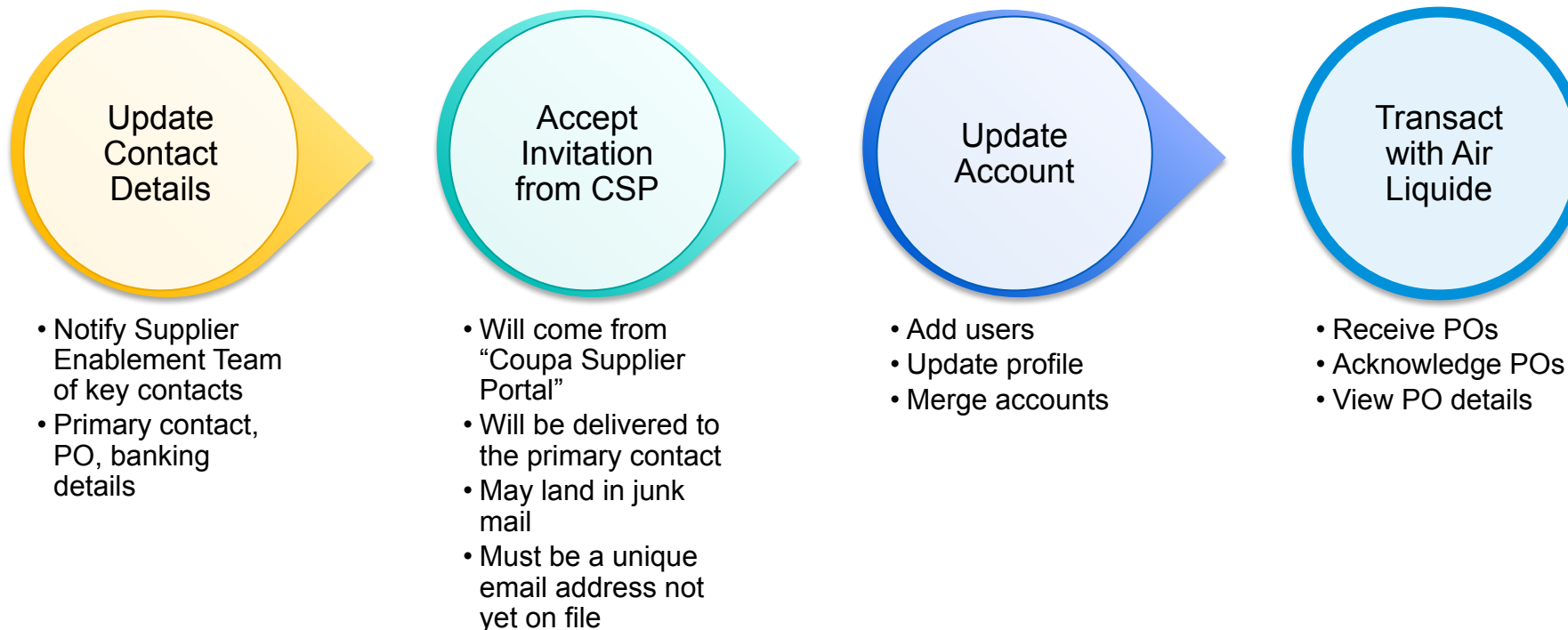
- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and create electronic invoices via online platform.
- As a Supplier, you will have the ability to :
 - 1) Manage your company information
 - 2) Configure your PO and invoice transmission preferences
 - 3) Create an online catalog
 - 4) View all of your purchase orders



Registration and Setup

Connection to Air Liquide via Coupa

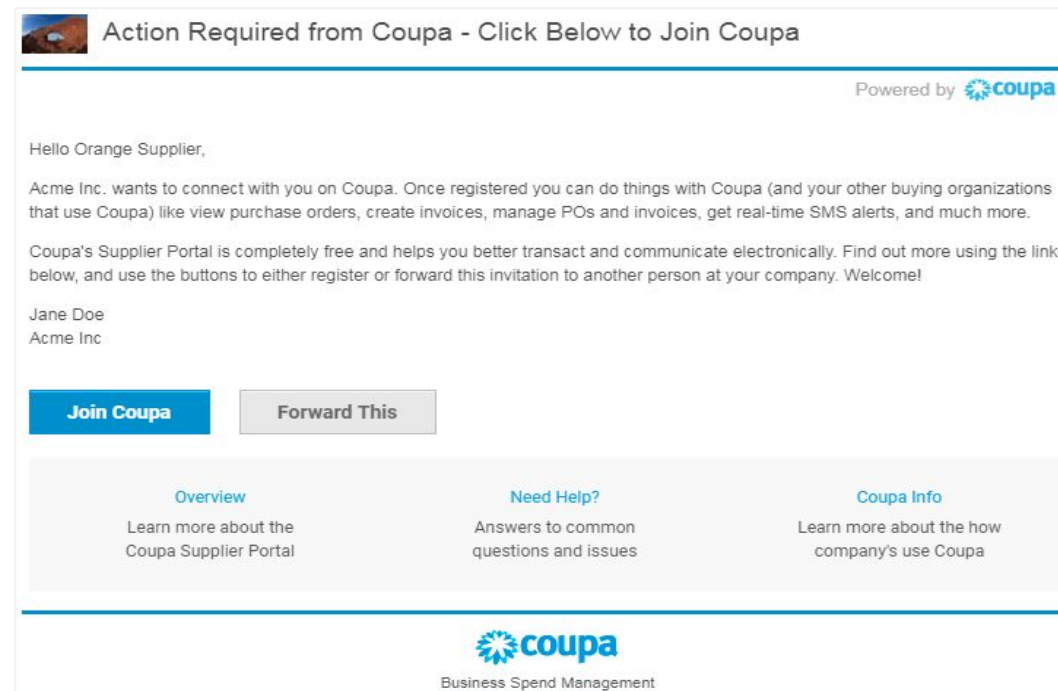
It is imperative that all suppliers connect to the Coupa platform to transact with Air Liquide successfully. Each of the below steps must happen before a supplier can properly interact with Air Liquide:



Registration and Setup

How to join Coupa Supplier Portal (CSP)? (1/2)

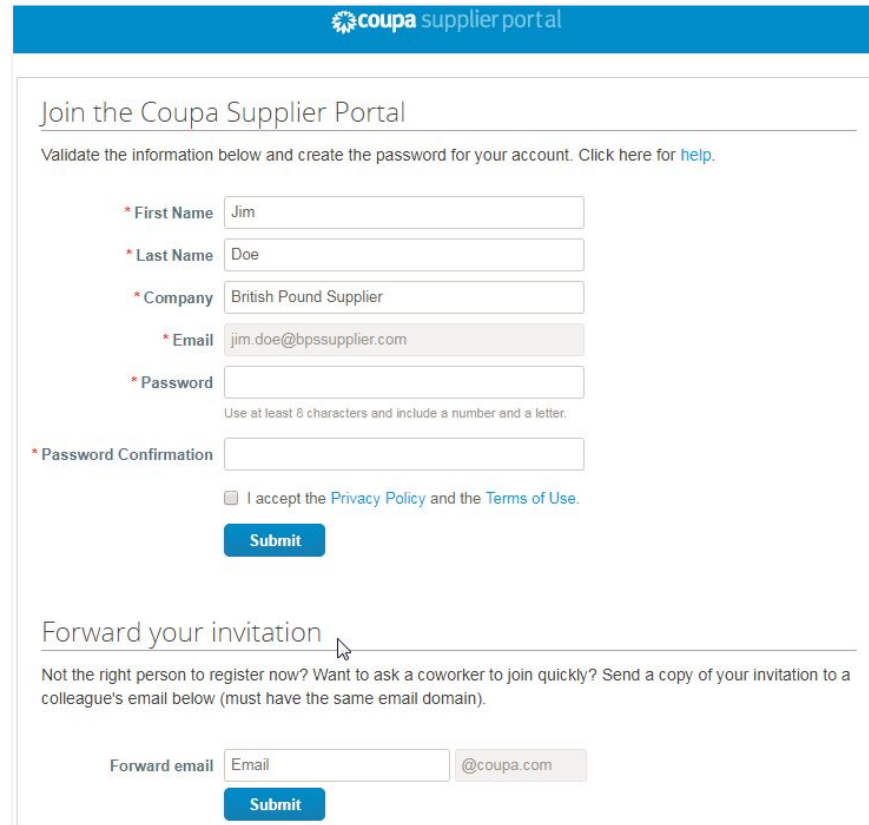
Below is a sample of the invitation letter that will come from Coupa Supplier Portal. Please alert your team to keep a look-out for this invitation and act upon it when it is received. Be sure to click only on the direct link at the bottom of the email invitation for CSP account registration.



Registration and Setup

How to join Coupa Supplier Portal (CSP)? (2/2)

You will automatically be redirected to the Coupa Supplier Portal account-registration page upon clicking on the direct link in your email invitation:
Complete the required remaining information to register your linked CSP account.



The screenshot shows the 'Join the Coupa Supplier Portal' registration page. It features a blue header with the 'coupa supplier portal' logo. Below the header, the page title is 'Join the Coupa Supplier Portal' and a sub-header reads 'Validate the information below and create the password for your account. Click here for help.' The registration form includes fields for First Name (Jim), Last Name (Doe), Company (British Pound Supplier), Email (jim.doe@bpssupplier.com), Password, and Password Confirmation. A checkbox for 'I accept the Privacy Policy and the Terms of Use' is present. A blue 'Submit' button is located below the form. Below the registration form, there is a section titled 'Forward your invitation' with a sub-header 'Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain)'. This section includes a 'Forward email' field with 'Email' and '@coupa.com' as placeholders, and another blue 'Submit' button.

Registration and Setup

Manage Account

- Once, you click the emailed link and sign up for the CSP, you can manage your account information.
- Click on your **user** and **Account Settings**.
- Edit your **first name**, **last name**, **email*** and **password**.

(*Email can't be changed. If you want to change it, you have to create a new CSP account and connect it to your company.)

My Account Password

- Settings
- Notification Preferences
- Security & Two-Factor Authentication

* First Name

* Last Name

* Email

* Current Password

Password
Use at least 8 characters and include a number and a letter.

Password Confirmation

[Save](#)

Registration and Setup

View and Manage Notifications

- On the **Notification Preferences** page, you will be able to select notifications you want to receive as well as the channel where you want to receive the notification: **online** (to do list) - recommend, **email** - recommend, or **SMS*** (short text message).

(*You can choose to receive notifications in short text messages only if you have an SMS-capable device and you validate your phone number. SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. You can verify your mobile phone for SMS notification receiving on **Security and Two-Factor Authentication** page.)

My Account Notification Preferences

Settings

Notification Preferences

Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

Catalogs

| | | | |
|------------------------------|--|---|------------------------------|
| A new comment is received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A catalog is approved | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A catalog is rejected | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A catalog is about to expire | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |

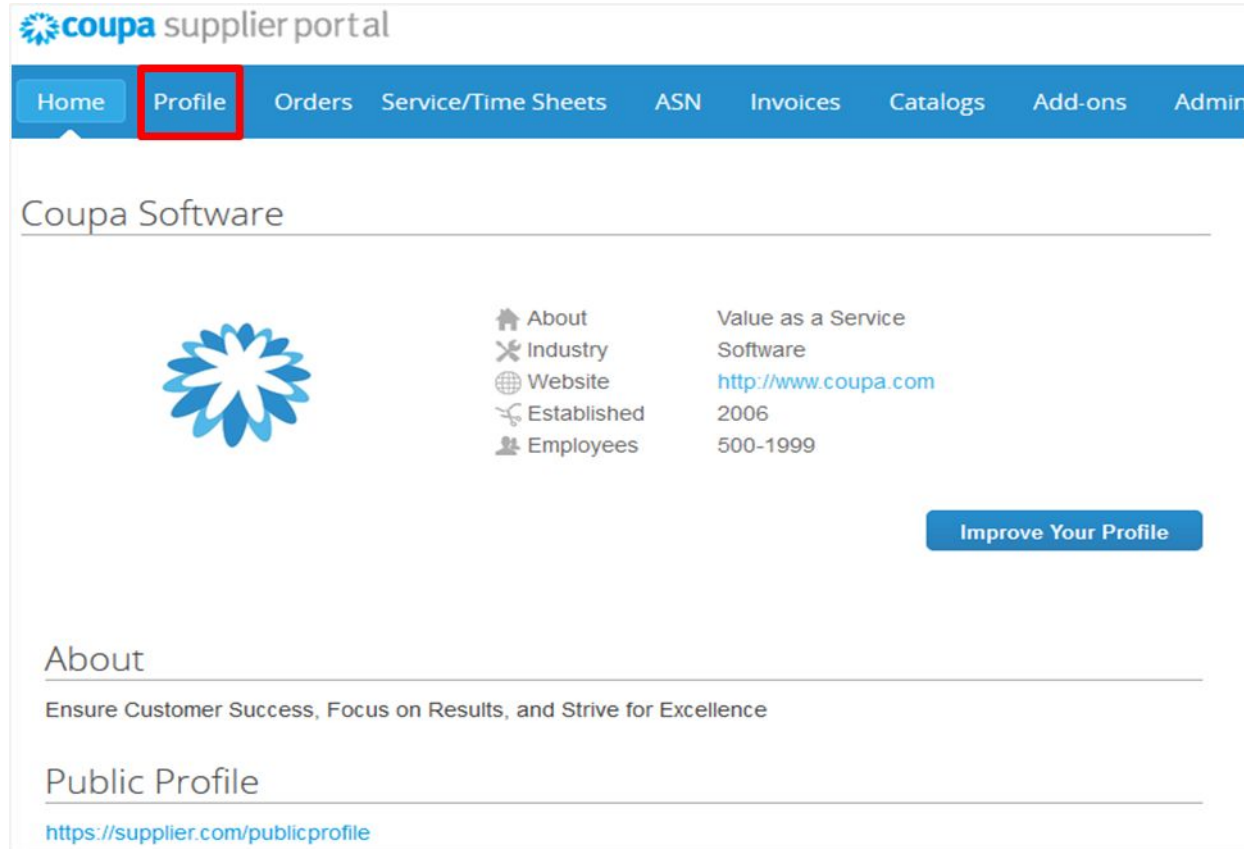
Coupa Accelerate

| | | | |
|------------------------|--|---|------------------------------|
| New Early Pay Customer | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
|------------------------|--|---|------------------------------|

Registration and Setup

Updating Supplier Profile


- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Profile information.
- Select **Profile** from the top menu bar.



coupa supplier portal

Home **Profile** Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Coupa Software



- About
- Industry
- Website
- Established
- Employees

Value as a Service Software
<http://www.coupa.com>
 2006
 500-1999

[Improve Your Profile](#)

About

Ensure Customer Success, Focus on Results, and Strive for Excellence

Public Profile

<https://supplier.com/publicprofile>

Completing Public Profile

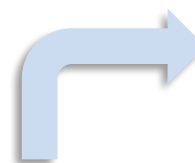
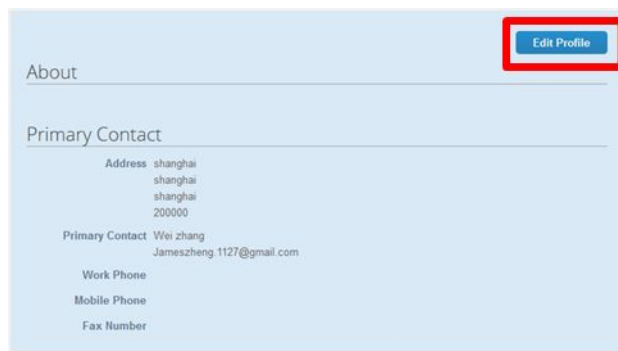
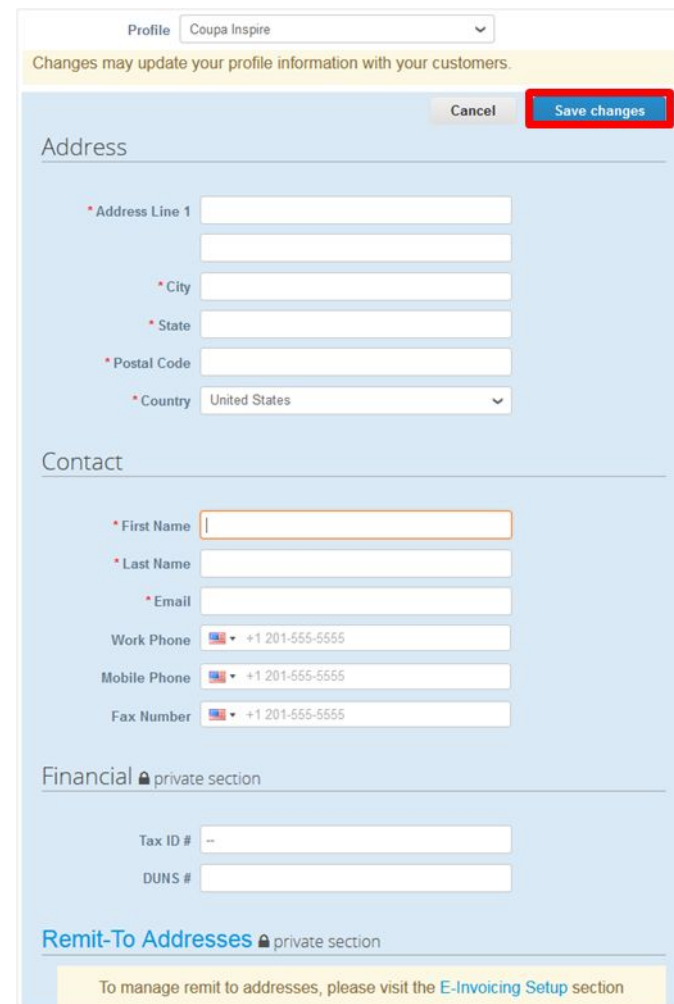


To start, complete your Public Profile*:

(*Public profile is what other Coupa customers, aside Air Liquide, can see about your company on the CSP.

You can also edit specific profile for one customer, but **information in the profile will not be transferred to Air Liquide system.**)

- Select **Profile** from the top menu bar
- Click **Edit Profile**
- Confirm existing company information and complete any missing fields in at least the **General Information, Address, Primary Contact** sections (**Required fields are marked with an asterisk**)
- Click **Save** when finished

Profile: Coupa Inspire

Changes may update your profile information with your customers.

Cancel Save changes

Address

* Address Line 1

* City

* State

* Postal Code

* Country: United States

Contact

* First Name

* Last Name

* Email

Work Phone: +1 201-555-5555

Mobile Phone: +1 201-555-5555

Fax Number: +1 201-555-5555

Financial private section

Tax ID #

DUNS #

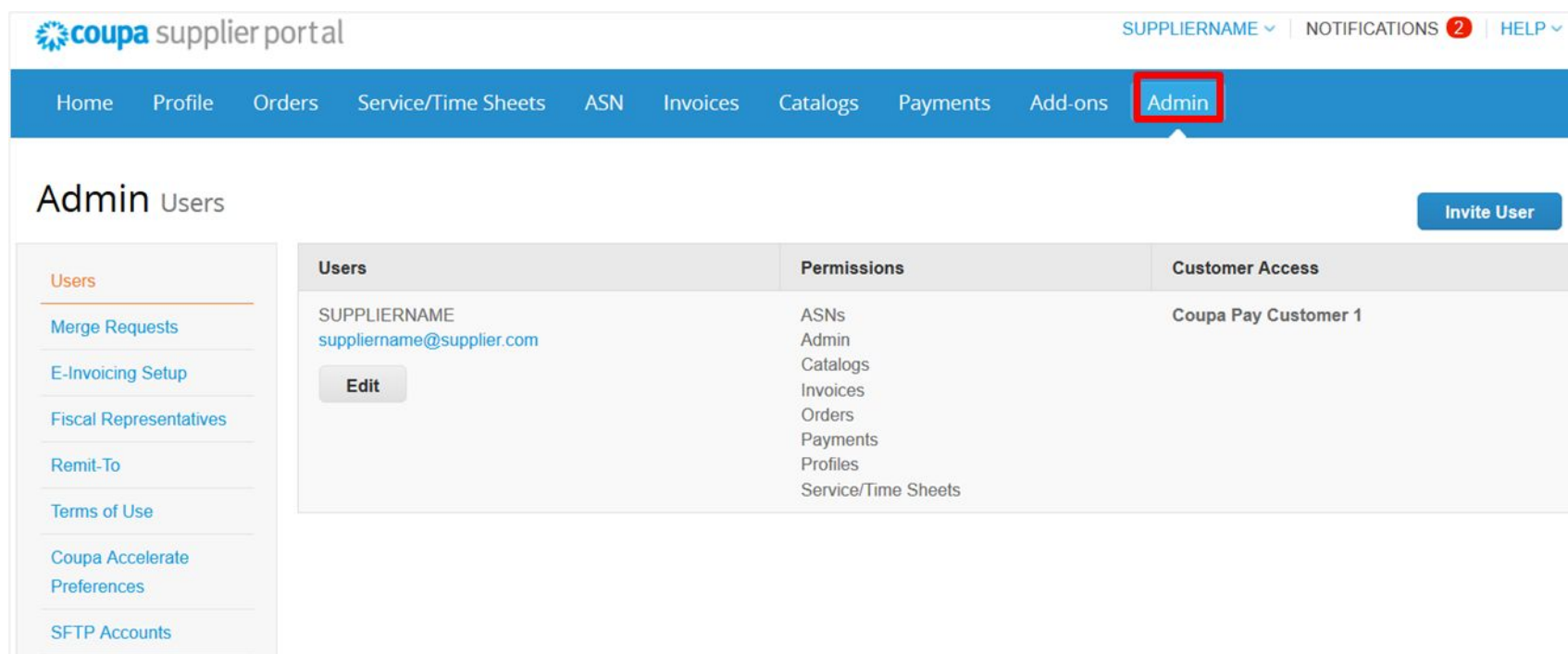
Remit-To Addresses private section

To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

Registration and Setup

Updating the Admin Settings

- Once, you click the emailed link and sign up for the CSP, you can manage and update your Admin information.
- Select **Admin** from the top menu bar.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Add-ons, and Admin (highlighted with a red box). To the right of the navigation bar, there are links for SUPPLIERNAME, NOTIFICATIONS (with a red '2' badge), and HELP.

Below the navigation bar, the page title is "Admin Users" and there is an "Invite User" button. On the left side, there is a sidebar menu with the following items: Users (highlighted), Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate Preferences, and SFTP Accounts.

The main content area displays a table with the following columns: Users, Permissions, and Customer Access.

| Users | Permissions | Customer Access |
|--|--|----------------------|
| SUPPLIERNAME suppliername@supplier.com <input type="button" value="Edit"/> | ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets | Coupa Pay Customer 1 |

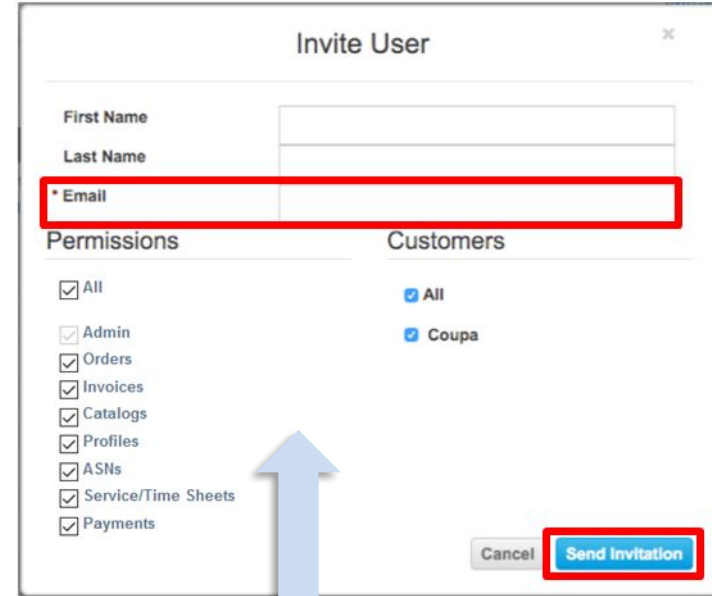
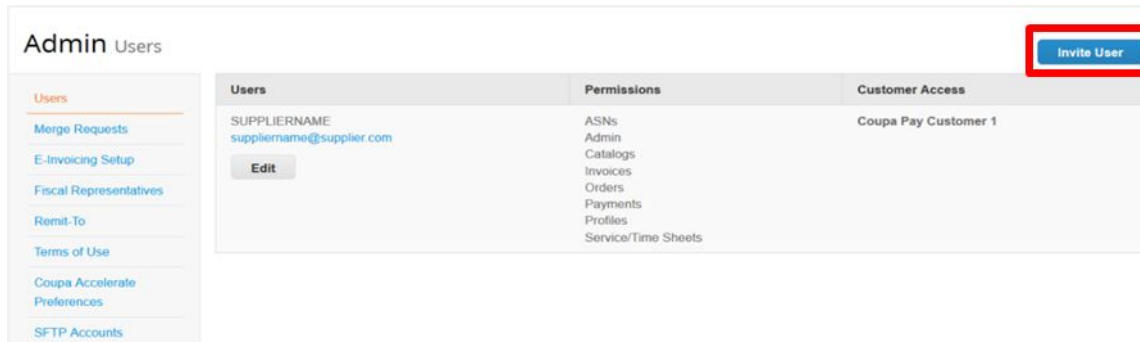
Adding Users



If desired, you can allow additional users access to your supplier account to perform all tasks*:

(*You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.)

- From the top menu bar, select **Admin**, then click **Invite User**
- Enter at least the employee's email address in the **Invite User** popup window and click **Send Invitation**
- You can restrict access to specific **customers** and **permissions** by checking/unchecking customer name boxes and permission boxes in the user table

| Users | Permissions | Customer Access |
|---|--|----------------------|
| SUPPLIERNAME suppliername@supplier.com Edit | ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets | Coupa Pay Customer 1 |

Editing Users



You can edit and manage individual user access at any time:

- From the top menu bar, select **Admin**, then click **Edit** under the desired User's name
- Modify the specific permissions and customer access by checking/unchecking respective boxes in the popup window user table
- Click **Save** when finished
- For auditing purposes, Coupa doesn't allow users to be deleted. You can **deactivate** a user when you no longer want that user to be able to access the account. You can also **reactivate** users later.

Edit user access for suppliername

User info

* First Name

* Last Name

* Email

Permissions

All

Admin

Orders

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Payments

Customers

All

Coupa Pay Customer 1

Cancel
Deactivate User
Save

Admin Users

| Users | Permissions | Customer Access |
|---|--|---------------------------|
| <p>SUPPLIERNAME suppliername@supplier.com</p> <p style="border: 2px solid red; display: inline-block; padding: 2px;">Edit</p> | <p>ASNs</p> <p>Admin</p> <p>Catalogs</p> <p>Invoices</p> <p>Orders</p> <p>Payments</p> <p>Profiles</p> <p>Service/Time</p> | <p>Coupa Pay Customer</p> |





Purchase Orders

Purchas Orders

Email and CSP are Linked

- You will be notified of the status of your Purchase Order via email.
- You can click **View Order** in the acknowledgement email to check the order in the Coupa Supplier Portal.

epic Purchase Order #191 Powered by **coupa**

Hi Mr.,
This is PO #191

Submitted By Inna Cao
Supplier 北京泰来华顿低温设备有限公司
Total **2.00 USD**

| | | | |
|-------|------|------------|----------|
| Items | test | 1.0 @ 2.00 | 2.00 USD |
|-------|------|------------|----------|

[View Order](#)

More Detail

| | |
|-------------------------------------|----------------------|
| PO ID 191 | Department None |
| Status Issued - Scheduled for email | Last Opened None |
| Order Date 06/03/19 | Acknowledged At None |
| Revision Date 06/03/19 | Payment Term None |
| Req # 441 | Incoterms None |

| | |
|-----------------|--|
| Supplier | Shipping |
| 北京泰来华顿低温设备有限公司 | 上海市古美路1515号 Building 18, No.1515 Gu Mei Road Shanghai China 200233 Shanghai China Attn: Inna Cao |

Lines

1.0 x test for 2.00 USD
Supplier 北京泰来华顿低温设备有限公司 • Commodity HCD401400 - Liquid hydrogen - Bulk - Account CNCH010-Project Number 1-Task Code 3-Expend Type 3-03-101021002-0-C02020103M000

Total 2.00 USD



epic Purchase Order #191 Sign Out

Status Issued - Sent via Email

Order Date 06/03/19
Revision Date 06/03/19
Requester Inna Cao
Email inna.cao@kpmg.com

Payment Term None
Stamped PO None
attachment
Attachments None
Acknowledged

Shipping

Ship-To Address 上海市古美路1515号
Building 18, No.1515 Gu Mei Road Shanghai
China
200233 Shanghai
China
Attn: Inna Cao

Terms None

Lines

Advanced Search Sort by Line Number: 0 → 9

| 1 | Type | Item | Qty | Unit | Price | Total | Invoiced |
|---|------|------|-----|------|-------|-------|----------|
| | | test | 1 | EACH | 2.00 | 2.00 | 0.00 |

Part Number None Special Requirements None

Per page 15 | 45 | 90

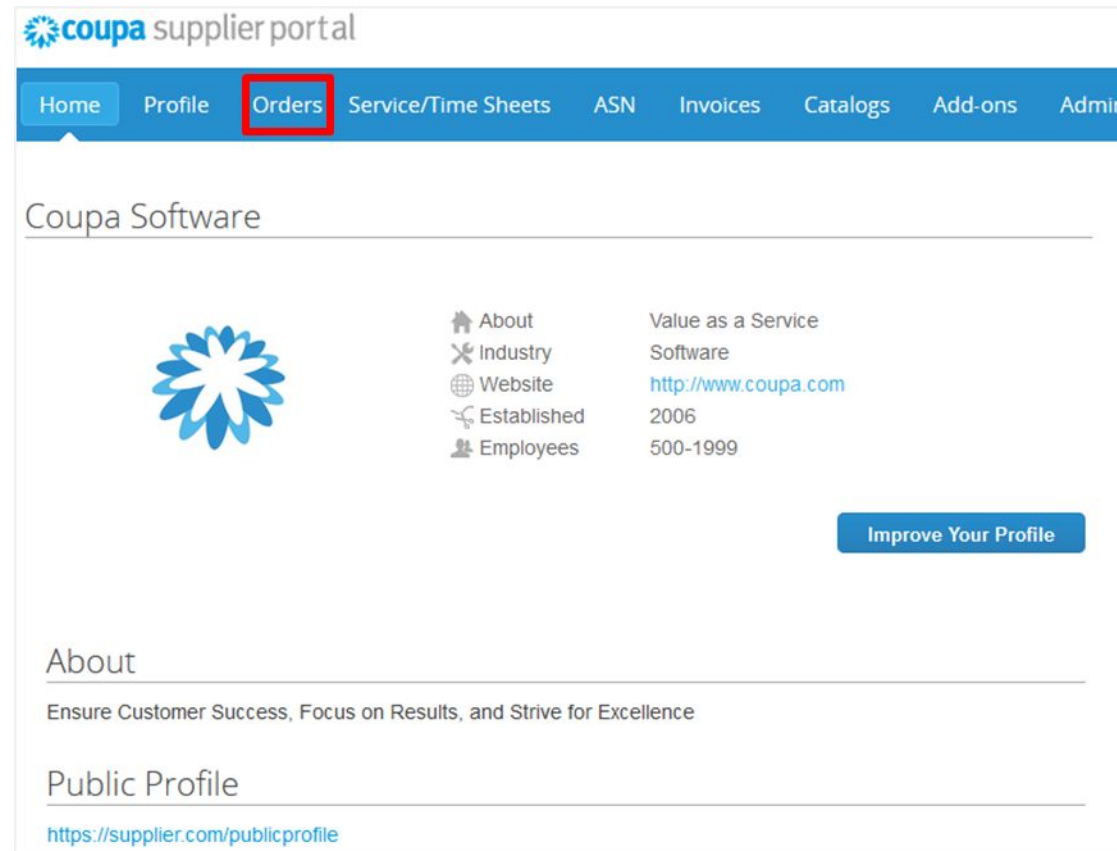
Total **2.00 USD**

[Create Invoice](#) [Save](#) [Print View](#)

Purchas Orders

Receive & View Orders (1/2)

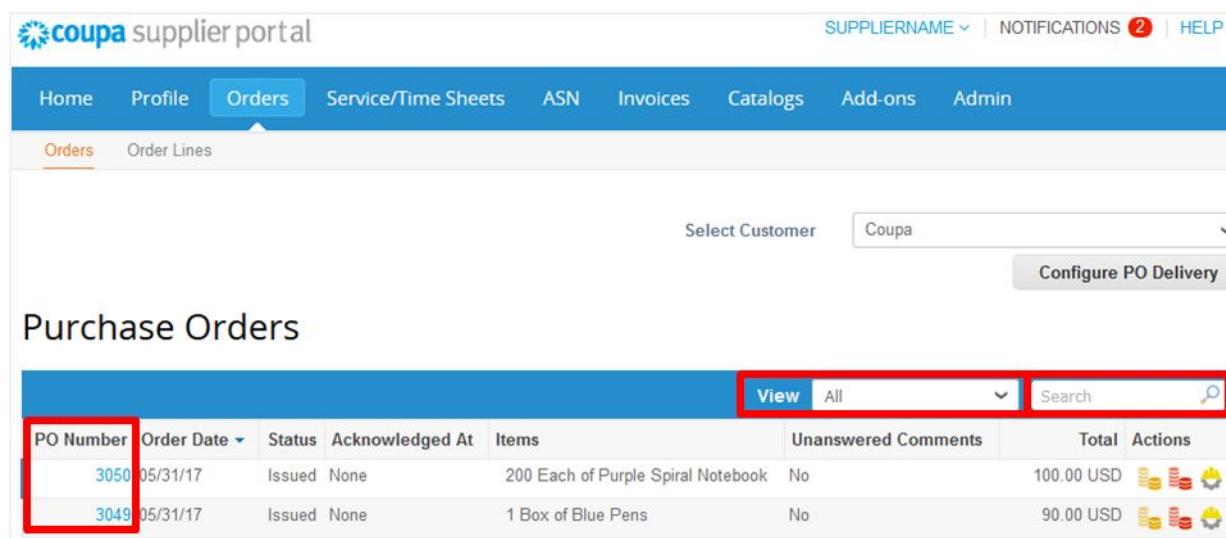
- Regardless of the PO delivery preference set, you will have access to POs within CSP.
- Select **Orders** from the top menu bar.



Purchas Orders

Receive & View Orders (2/2)

- A **Purchase Orders** screen will display and show all purchase orders sent by Air Liquide.
- To find purchase orders, you can use the **Search** functionality. You can also sort by column headers by clicking on any of the column headers (**PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions**).
- In addition, as you start to receive multiple purchase orders, you can use the **View** functionality to filter the purchase orders.
- All purchase orders on this screen are hyperlinked, and you can view additional information about the purchase order by clicking on that blue hyperlink, i.e. **PO Number**.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Below this, there is a 'Select Customer' dropdown menu set to 'Coupa' and a 'Configure PO Delivery' button. The main section is titled 'Purchase Orders' and contains a table with the following data:

| PO Number | Order Date | Status | Acknowledged At | Items | Unanswered Comments | Total | Actions |
|----------------------|------------|--------|-----------------|------------------------------------|---------------------|------------|---------|
| 3050 | 05/31/17 | Issued | None | 200 Each of Purple Spiral Notebook | No | 100.00 USD | |
| 3049 | 05/31/17 | Issued | None | 1 Box of Blue Pens | No | 90.00 USD | |

Purchas Orders

Acknowledge Orders

- The page refreshes to display the PO details and shipping address.
- Click the **Acknowledged** checkbox to notify the customer whose PO you have received. Air Liquide can also see the statue update.
(*If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address)
- You can also attach supporting document in **Supplier Attachment** field, and click on **Save**. Air Liquide can also see documents you attached.
- You can print the PO in PDF version by clicking **Print View**.

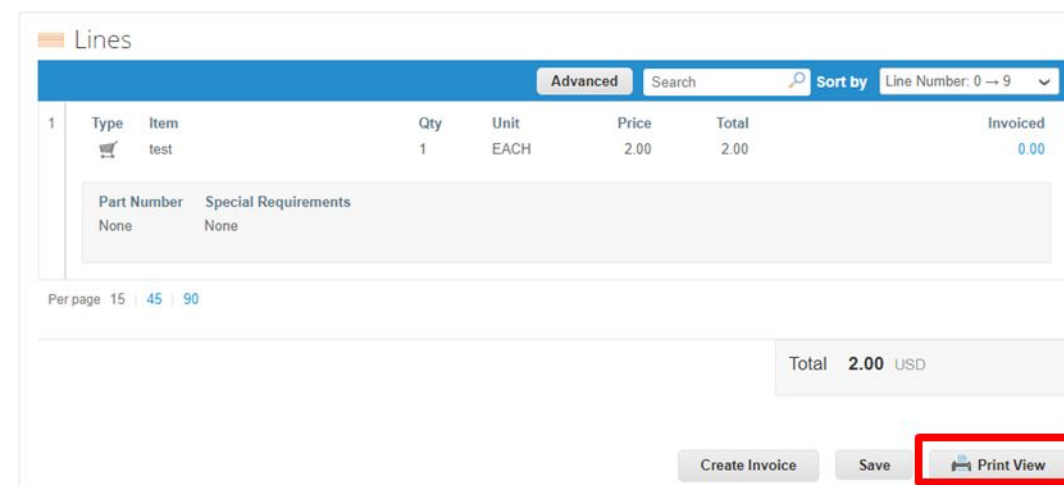


epic Purchase Order #191 Sign Out
 Status Issued - Sent via Email
 Order Date 06/03/19
 Revision Date 06/03/19
 Requester Inna Cao
 Email inna.cao@kpmg.com
 Payment Term None
 Stamped PO attachment None
 Attachments None
Acknowledged

Shipping
 Ship-To Address 上海市吉美路1515号
 Building 18, No. 1515 Gu Mei Road Shanghai
 China
 200233 Shanghai
 China
 Attn: Inna Cao
 Terms None



PO view screen continued



Lines Advanced Search Sort by Line Number: 0 → 9

| 1 | Type | Item | Qty | Unit | Price | Total | Invoiced |
|-------------|------|----------------------|-----|------|-------|-------|----------|
| | | test | 1 | EACH | 2.00 | 2.00 | 0.00 |
| Part Number | | Special Requirements | | | | | |
| None | | None | | | | | |

Per page 15 | 45 | 90

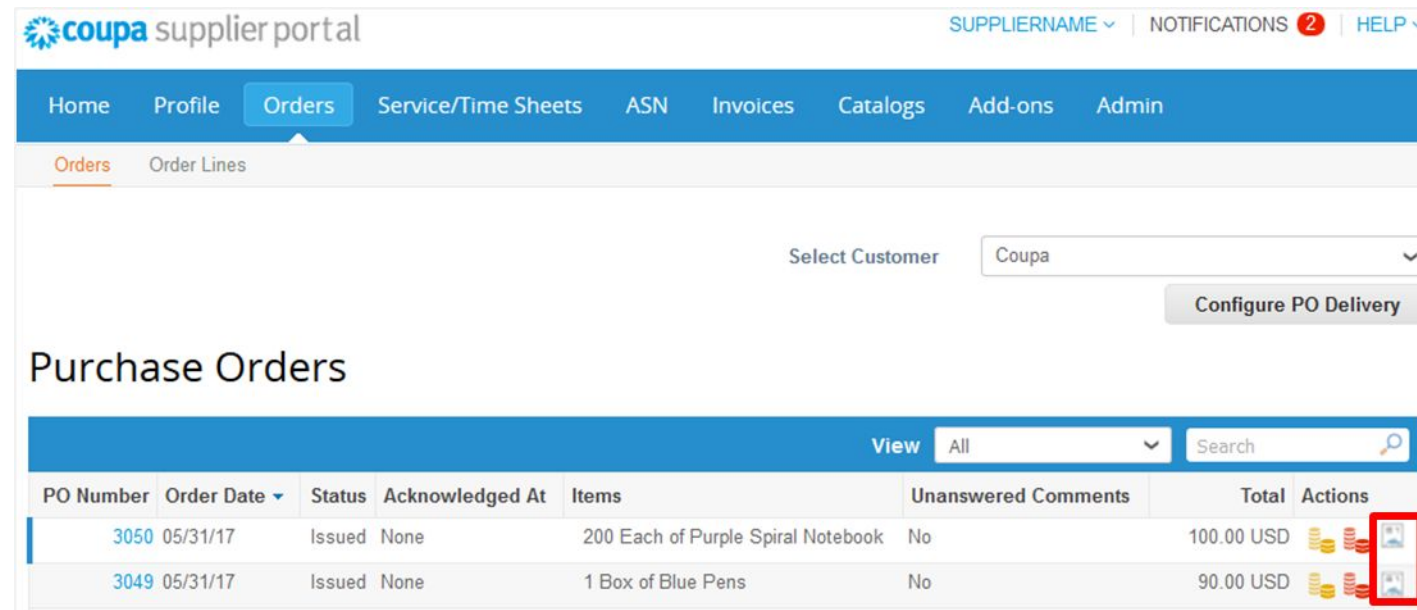
Total 2.00 USD

Create Invoice Save **Print View**

Purchas Orders

Create or Edit an ASN (1/2)

- This feature is available **only** if your customer enables it in Coupa.
- With Advance Ship Notices (ASNs), suppliers can send notifications to their customers about **when** they ship items via CSP.
- When you receive a purchase order, you can flip it into an ASN and send it to your customer by clicking on the **Flip to ASN** (📄) icon in the **Purchase Orders** table.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Below this, there is a 'Select Customer' dropdown menu set to 'Coupa' and a 'Configure PO Delivery' button. The main section is titled 'Purchase Orders' and contains a table with the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The table lists two purchase orders: PO 3050 (200 Each of Purple Spiral Notebook) and PO 3049 (1 Box of Blue Pens). In the 'Actions' column for each row, there are icons for 'Print', 'Cancel', 'Reorder', and 'Flip to ASN'. The 'Flip to ASN' icon (a document with a checkmark) is highlighted with a red box.

| PO Number | Order Date | Status | Acknowledged At | Items | Unanswered Comments | Total | Actions |
|-----------|------------|--------|-----------------|------------------------------------|---------------------|------------|----------|
| 3050 | 05/31/17 | Issued | None | 200 Each of Purple Spiral Notebook | No | 100.00 USD | 📄 🗑️ 🔄 📄 |
| 3049 | 05/31/17 | Issued | None | 1 Box of Blue Pens | No | 90.00 USD | 📄 🗑️ 🔄 📄 |

Purchas Orders

Create or Edit an ASN (2/2)

- On the **Create Advance Ship Notice** page, fill out the form with the info. you want to share. Make sure to include the required **ASN number**. This can be any number you like.
- Note: Please do not edit or change the Ship To Address on the ASN, which defaults to the shipping address of the purchase order. If you change the address and requester cannot receive the goods on time, the payment process will also be impacted.**
- Click on the **Submit** button to send the ASN to your customer.
- When you send an ASN to a customer, the PO status changes to **Issued** even if you haven't sent the customer an invoice yet.

Create Advance Ship Notice

General Info

*ASN #

Status: draft

Ship Date:

Delivery Date:

Ship To

Address: 123 Value Drive
San Mateo, CA 94402
USA

Shipping Info

Tracking Number:

Carrier:

Shipping Method:

Ship Note:

Lines

| 1 | Description | Quantity | UOM | Received Quantity | Status |
|---|-------------|-----------------------------------|-----|-------------------|--------|
| | Blue Pens | <input type="text" value="0.00"/> | Box | 0 | draft |

Supplier Part Num: 123456789 PO #: 3049 PO Line: 1 Po Line Quantity: 100.0

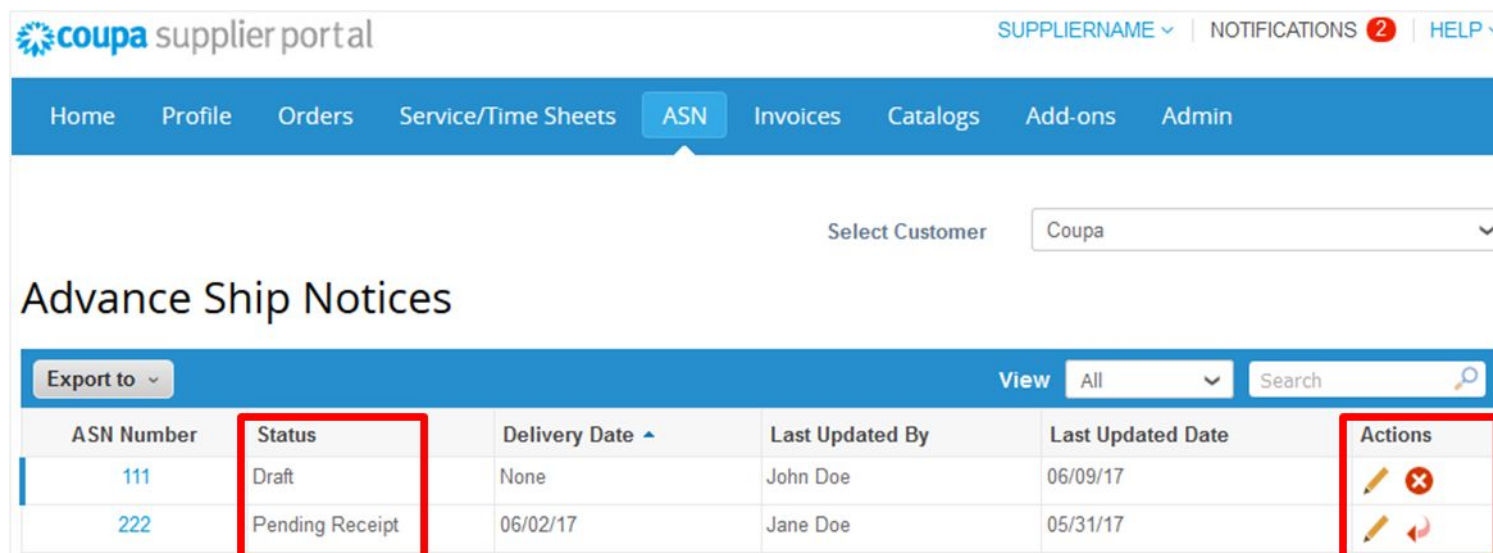
Invoice Num Reference: Invoice: Invoice Line: Invoice Line Qty:

Comments:

Cancel Save Submit

View and Manage ASNs

- Click on the **ASN** tab on the main menu. The **Advance Ship Notices** page appears.
- On the **Advance Ship Notices** page, you can see the **status** of your ASNs for each customer.
- When a customer receives your shipment, the ASN status changes to **Partially Received** or **Fully Received**, depending on what items they have received. You can also cancel the ASN. The status appears as **Cancelled** to the customer.
- You can also **edit**, **delete** or **cancel** ASNs by clicking on the icons under Actions part. You can edit ASNs in **draft** or **pending receipt** status. You can delete ASNs in **draft** status. You can cancel ASNs that are **pending receipt**.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'ASN' selected. Below it, a 'Select Customer' dropdown is set to 'Coupa'. The main heading is 'Advance Ship Notices'. Below the heading, there's a table with columns: ASN Number, Status, Delivery Date, Last Updated By, Last Updated Date, and Actions. The 'Status' and 'Actions' columns are highlighted with red boxes. The table contains two rows of data.

| ASN Number | Status | Delivery Date | Last Updated By | Last Updated Date | Actions |
|------------|-----------------|---------------|-----------------|-------------------|-----------------|
| 111 | Draft | None | John Doe | 06/09/17 | [Edit] [Delete] |
| 222 | Pending Receipt | 06/02/17 | Jane Doe | 05/31/17 | [Edit] [Cancel] |

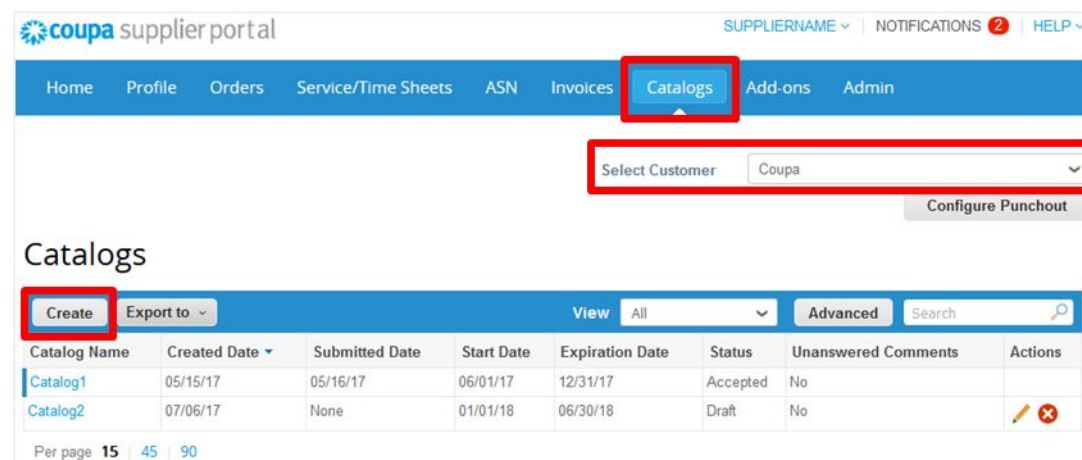




Catalogs

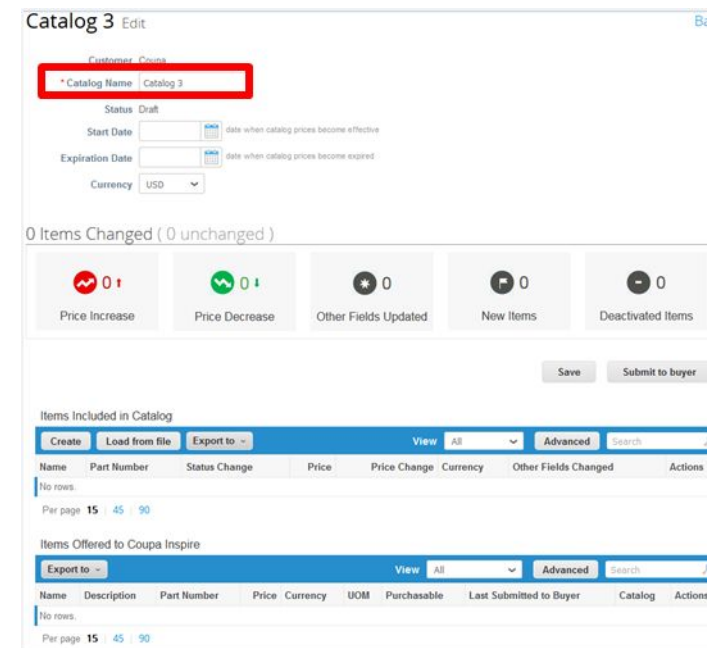
Catalogs

Create or Edit a Catalog (1/8)

- If you have aligned with Air Liquide Procurement team to maintain **supplier hosted catalogs**, you can create and manage your catalog items on CSP.
- To create a catalog for Air Liquide, go to the **Catalogs** page, select the Air Liquide from the **Select Customer** drop-down list in the top right corner, and click on the **Create** button.
- On the **Catalog Edit** page, fill out the form with the info you want to share. Make sure to include the required **Catalog Name**, such as [Your Company Name] Catalog [Number].
- You can create as many catalogs as you want, but each catalog must be **approved by** Air Liquide before it can be included in Coupa search results.



| Catalog Name | Created Date | Submitted Date | Start Date | Expiration Date | Status | Unanswered Comments | Actions |
|--------------|--------------|----------------|------------|-----------------|----------|---------------------|---|
| Catalog1 | 05/15/17 | 05/16/17 | 06/01/17 | 12/31/17 | Accepted | No | |
| Catalog2 | 07/06/17 | None | 01/01/18 | 06/30/18 | Draft | No |   |



0 Items Changed (0 unchanged)

Price Increase: 0 | Price Decrease: 0 | Other Fields Updated: 0 | New Items: 0 | Deactivated Items: 0

Items Included in Catalog

| Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | Actions |
|----------|-------------|---------------|-------|--------------|----------|----------------------|---------|
| No rows. | | | | | | | |

Items Offered to Coupa Inspire






| Name | Description | Part Number | Price | Currency | UOM | Purchasable | Last Submitted to Buyer | Catalog | Actions |
|----------|-------------|-------------|-------|----------|-----|-------------|-------------------------|---------|---------|
| No rows. | | | | | | | | | |

Catalogs

Create or Edit a Catalog (2/8)

- The **n Item(s) Changed** section provides information on changes to the catalog.
- If you accept the changes, click **Submit to buyer** to have Air Liquide approve the catalog for inclusion in their Coupa environment.
- When you submit your catalog, you can see the following message in the green notification bar: "*Catalog was submitted and buyer will be notified.*"
- You can also add comments for Air Liquide. After your catalog is accepted, you cannot edit it. Instead, you have to change or update it by submitting a new version.

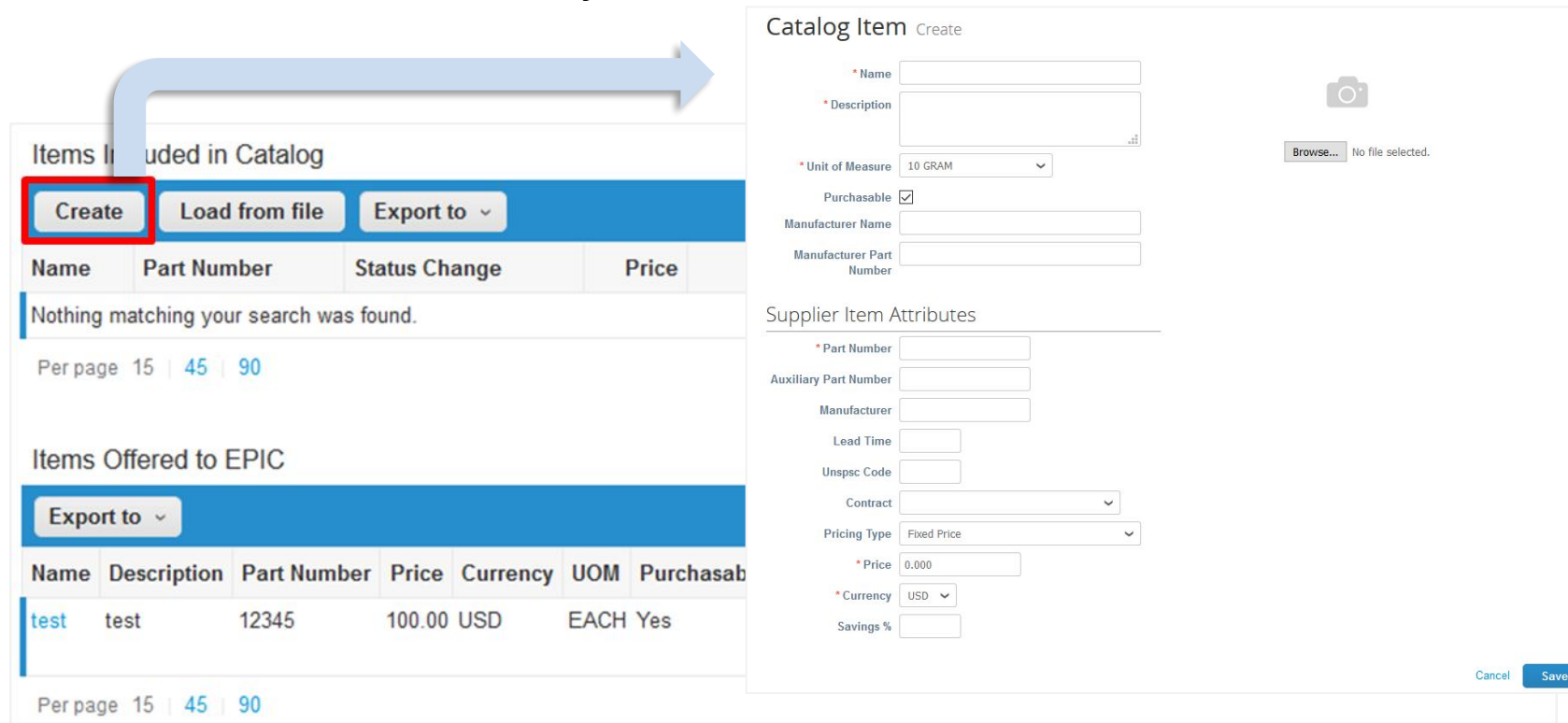
0 Items Changed (0 unchanged)

| | | | | |
|---|--|---|---|---|
|  0 ↑ |  0 ↓ |  0 |  0 |  0 |
| Price Increase | Price Decrease | Other Fields Updated | New Items | Deactivated Items |

Catalogs

Create or Edit a Catalog (3/8)

- In the **Items Included in Catalog** table, you can create or modify items one-by-one or with the bulk loader:
- You can click on **Create** button to add a new item or on **Edit** icon (✎) to edit a saved item.
- On the **Catalog Item Create** page, fill out the form with the info. you want to share. Make sure to include the required **Item Name, Description, Unit of Measure, Part Number, Price and Currency**.



The screenshot displays two main components of the EPIC system interface:

Items Included in Catalog Table:

| Name | Part Number | Status Change | Price |
|---|-------------|---------------|-------|
| Nothing matching your search was found. | | | |
| Per page 15 45 90 | | | |

Below the table, there is a section for "Items Offered to EPIC" with an "Export to" dropdown menu.

| Name | Description | Part Number | Price | Currency | UOM | Purchasab |
|------|-------------|-------------|--------|----------|------|-----------|
| test | test | 12345 | 100.00 | USD | EACH | Yes |

Per page 15 | 45 | 90

Catalog Item Create Form:

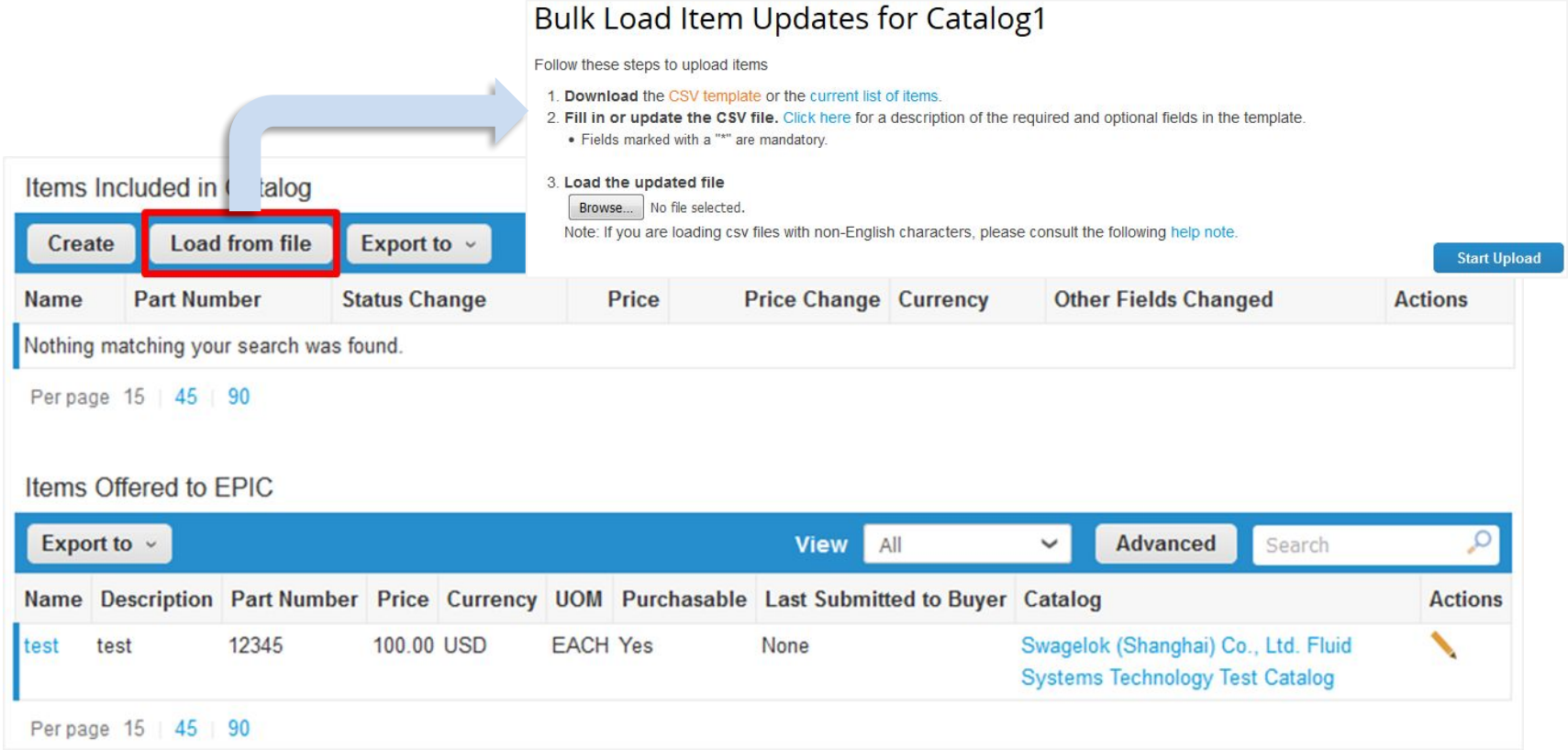
- Name:** [Text input field]
- Description:** [Text input field]
- Unit of Measure:** 10 GRAM (Dropdown menu)
- Purchasable:**
- Manufacturer Name:** [Text input field]
- Manufacturer Part Number:** [Text input field]
- Supplier Item Attributes:**
 - Part Number:** [Text input field]
 - Auxiliary Part Number:** [Text input field]
 - Manufacturer:** [Text input field]
 - Lead Time:** [Text input field]
 - Unspsc Code:** [Text input field]
 - Contract:** [Dropdown menu]
 - Pricing Type:** Fixed Price (Dropdown menu)
 - Price:** 0.000 (Text input field)
 - Currency:** USD (Dropdown menu)
 - Savings %:** [Text input field]

Buttons: Cancel, Save

Catalogs

Create or Edit a Catalog (4/8)

- In the **Items Included in Catalog** table, you can create or modify items one-by-one or with the bulk loader:
- You can also use the bulk loader to add or update multiple items in a catalog by clicking on the **Load from file** button and follow the steps on the **Bulk Load Item Updates for [Catalog Name]** page.



Bulk Load Item Updates for Catalog1

Follow these steps to upload items

- Download the [CSV template](#) or the [current list of items](#).
- Fill in or update the CSV file. [Click here](#) for a description of the required and optional fields in the template.
 - Fields marked with a "*" are mandatory.
- Load the updated file

No file selected.

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

Items Included in Catalog

| Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | Actions |
|---|-------------|---------------|-------|--------------|----------|----------------------|---------|
| Nothing matching your search was found. | | | | | | | |
| Per page 15 45 90 | | | | | | | |

Items Offered to EPIC

All

| Name | Description | Part Number | Price | Currency | UOM | Purchasable | Last Submitted to Buyer | Catalog | Actions |
|-----------------------|-------------|-------------|--------|----------|------|-------------|-------------------------|---|---------|
| test | test | 12345 | 100.00 | USD | EACH | Yes | None | Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Test Catalog | |
| Per page 15 45 90 | | | | | | | | | |

Catalogs

Create or Edit a Catalog (5/8)

- All of the items in **Items Included in Catalog** table are not available in Coupa until the catalog is approved by Air Liquide. Once approved, the items are also listed in the **Items Offered to Air Liquide** table below.
- The **Items Offered to Air Liquide** table lists all the items that have been accepted and published in Air Liquide's Coupa environment.
- Unlike **Items Included in Catalog**, which can be deleted before submitting the catalog for approval, **Items Offered to Air Liquide** cannot be deleted. Once an item is accepted and published, it cannot be deleted, only deactivated allowed.

Items Included in Catalog

| Create | | Load from file | | Export to ▾ | | View | | New Items ▾ | | Advanced | | Search | |
|------------------------|-------------|----------------|--------|--------------|----------|----------------------|--|-------------|--|----------|--|--------|--|
| Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | | Actions | | | | | |
| laptop | 100100 | New | 400.00 | | USD | | | ✎ ✖ | | | | | |

Per page 15 | 45 | 90


Items Offered to EPIC

| Export to ▾ | | View | | All ▾ | | Advanced | | Search | |
|----------------------|-------------|-------------|--------|----------|------|-------------|-------------------------|---|---------|
| Name | Description | Part Number | Price | Currency | UOM | Purchasable | Last Submitted to Buyer | Catalog | Actions |
| test | test | 12345 | 100.00 | USD | EACH | Yes | None | Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Test Catalog | ✎ |

Per page 15 | 45 | 90

Catalogs

Create or Edit a Catalog (6/8)

- To modify an accepted and published catalog like modifying the price, description, and other information of items included, you need to **recreate a catalog**.
- On the catalog editing page, the **Items Offered to Air Liquide** table displays items information from the existing catalog. Click on the pencil  con to update the catalog items information.

Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Catalog 4 [Edit](#) [Back](#)

Customer: EPIC

* Catalog Name: Swagelok (Shanghai) Co., Lt.

Status: Draft

Start Date: date when catalog prices become effective

Expiration Date: date when catalog prices become expired



Currency: USD

1 Item Changed (1 Unchanged)

Price Increase: 0 ↑ Price Decrease: 0 ↓ Other Fields Updated: 0 New Items: 1 Deactivated Items: 0


[Save](#) [Submit to buyer](#)

Items Included in Catalog

| Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | Actions |
|--------|-------------|---------------|--------|--------------|----------|----------------------|---|
| laptop | 100100 | New | 400.00 | | USD | |   |

Per page: 15 45 90


Items Offered to EPIC

| Name | Description | Part Number | Price | Currency | UOM | Purchasable | Last Submitted to Buyer | Catalog | Actions |
|------|-------------|-------------|--------|----------|------|-------------|-------------------------|---|---|
| test | test | 12345 | 100.00 | USD | EACH | Yes | None | Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Test Catalog |  |

Per page: 15 45 90

Catalogs

Create or Edit a Catalog (7/8)

- After clicking on the pencil  icon, item editing page appears and you change based on the original item information.
- Click **Save**, the name, description, and percentage of price changes will be shown in **Price Change** and **Other Fields Changed** section.

test 2.0 [Edit](#)

* Name


* Description

* Unit of Measure

Purchasable

Manufacturer Name

Manufacturer Part Number



Supplier Item Attributes

* Part Number

Auxiliary Part Number

Manufacturer

Lead Time

Unspsc Code

Contract

Pricing Type

* Price

* Currency

Savings %

[Cancel](#) [Save](#)

Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Catalog 4 [Edit](#) [Back](#)

Customer EPIC

* Catalog Name

Status Draft

Start Date date when catalog prices become effective

Expiration Date date when catalog prices become expired



Currency

2 Items Changed (3 unchanged)

Price Increase 1 ↑ Price Decrease 0 ↓ Other Fields Updated 3 New Items 1 Deactivated Items 0


[Save](#) [Submit to buyer](#)

Items Included in Catalog

| Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | Actions |
|----------|-------------|---------------|--------|--------------|----------|------------------------------|---|
| test 2.0 | 12345 | Updated | 150.00 | 50.00 % | USD | Name, Description, Image url |   |

Per page 15 | 45 | 90


Items Offered to EPIC

| Name | Description | Part Number | Price | Currency | UOM | Purchasable | Last Submitted to Buyer | Catalog | Actions |
|------|-------------|-------------|--------|----------|------|-------------|-------------------------|---|---|
| test | test | 12345 | 100.00 | USD | EACH | Yes | None | Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Test Catalog |  |

Per page 15 | 45 | 90

Catalogs


Create or Edit a Catalog (8/8)

- After submitting to buyer, the status of new catalog is displayed as **Pending Approval**.
- If Air Liquide buyer rejects the new catalog, the status will be updated to **Rejected**.
- You can click on the pencil  icon to re-fill in the information or add a comment, and resubmit the catalog. The status will be updated to **Pending Approval** again.

Catalogs


Catalog was submitted and buyer will be notified. ✕

Create Export to View All Advanced Search

| Catalog Name | Created Date | Submitted Date | Start Date | Expiration Date | Status | Unanswered Comments | Error | Actions |
|--|--------------|----------------|------------|-----------------|------------------|---------------------|-------|---|
| Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Catalog 4 | 06/17/19 | 06/17/19 | None | None | Pending Approval | No | |  |

Catalogs

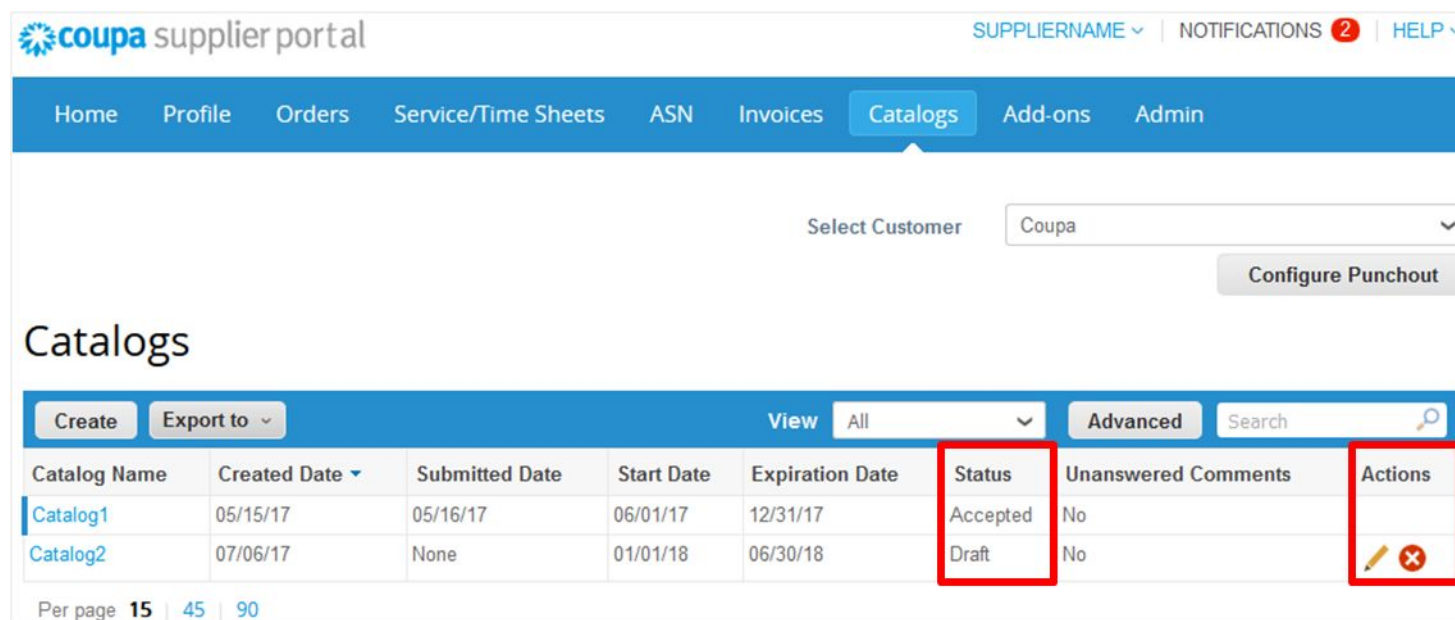
Create Export to View All Advanced Search

| Catalog Name | Created Date | Submitted Date | Start Date | Expiration Date | Status | Unanswered Comments | Error | Actions |
|--|--------------|----------------|------------|-----------------|----------------------|---------------------|-------|---|
| Swagelok (Shanghai) Co., Ltd. Fluid Systems Technology Catalog 4 | 06/17/19 | 06/17/19 | None | None | Rejected by Customer | No | |  |

Catalogs

View and Manage Catalogs

- Click on the **Catalogs** tab on the main menu. The **Catalogs** page appears.
- On the **Catalogs** page, you can see the **status** of your catalogs for each customer.
- You can also **edit** or **delete** catalogs by clicking on the icons under **Actions** part. You can edit only **draft** catalogs. You can delete catalogs in **draft** or **awaiting/pending approval** status.



coupa supplier portal

SUPPLIERNAME | NOTIFICATIONS 2 | HELP



Home Profile Orders Service/Time Sheets ASN Invoices **Catalogs** Add-ons Admin

Select Customer Coupa

Configure Punchout

Catalogs

Create Export to View All Advanced Search

| Catalog Name | Created Date | Submitted Date | Start Date | Expiration Date | Status | Unanswered Comments | Actions |
|--------------|--------------|----------------|------------|-----------------|----------|---------------------|---|
| Catalog1 | 05/15/17 | 05/16/17 | 06/01/17 | 12/31/17 | Accepted | No | |
| Catalog2 | 07/06/17 | None | 01/01/18 | 06/30/18 | Draft | No |   |

Per page 15 | 45 | 90



SAN/Email

SAN/E-mail

Transactions in Coupa Via Email


- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and create comments via email which is called **Supplier Actionable Notification (SAN)**.
- As a Supplier, you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email.
- The notification email will include action buttons, so you will be able to acknowledge the PO, add a comment to the PO depending on what you click.
- There is no need for suppliers to sign into another website or portal.
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications.



Receive a Purchase Order via Email

- If the Supplier email address is added in the Air Liquide systems, the PO will be automatically emailed to you directly.
- Purchase Orders will show up as **Coupa Notifications** in your mailbox.
 - POs will be issued to a unique PO email address confirmed by the supplier or to the primary contact email address if a separate PO email has not been identified. Contact Air Liquide Procurement team if you are unsure which email is currently on file or need to update your information.

EPIC Purchase Order #191

Powered by 

[Create Invoice](#)
[Acknowledge PO](#)
[Add Comment](#)

[Login](#)

**EPIC
PURCHASE ORDER**

北京泰来华顿低温设备有限公司

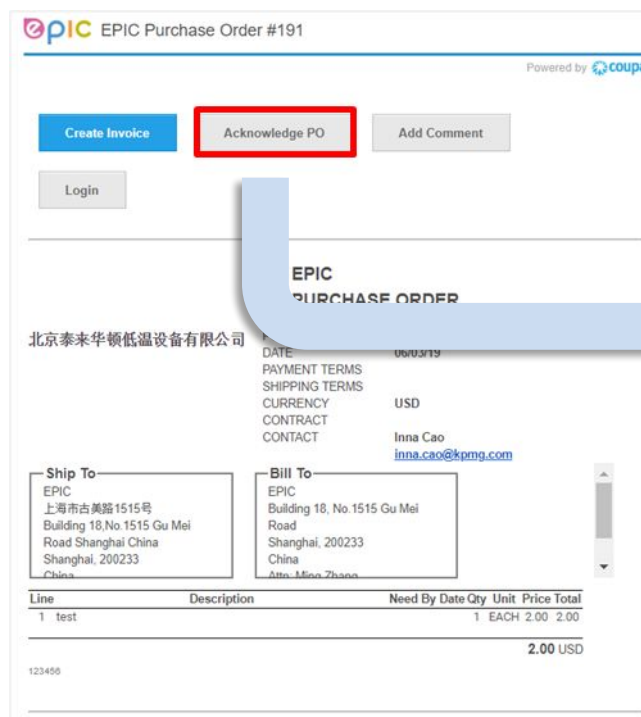
PO NUMBER 191
 DATE 06/03/19
 PAYMENT TERMS
 SHIPPING TERMS
 CURRENCY USD
 CONTRACT
 CONTACT Inna Cao
inna.cao@kpmg.com

| Line | Description | Need By Date | Qty | Unit | Price | Total |
|------|-------------|--------------|-----|------|-------|-----------------|
| 1 | test | | 1 | EACH | 2.00 | 2.00 |
| | | | | | | 2.00 USD |


123456

Acknowledge a Purchase Order via Email

- View the PO information and click on the **Acknowledge PO** to notify Air Liquide that you have received the Purchase Order.
- Once you click **Acknowledge PO**, a separate browser tab or window will pop up with a green banner at the top telling you **Order acknowledged**.
(*If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address)
- You can also attach supporting document in **Supplier Attachment** field, and click on **Save**. Air Liquide can also see documents you attached.
- You can print the PO in PDF version by clicking **Print View**.



epic EPIC Purchase Order #191

Powered by 

Buttons: Create Invoice, Acknowledge PO, Add Comment, Login

EPIC PURCHASE ORDER

北京泰来华顿低温设备有限公司

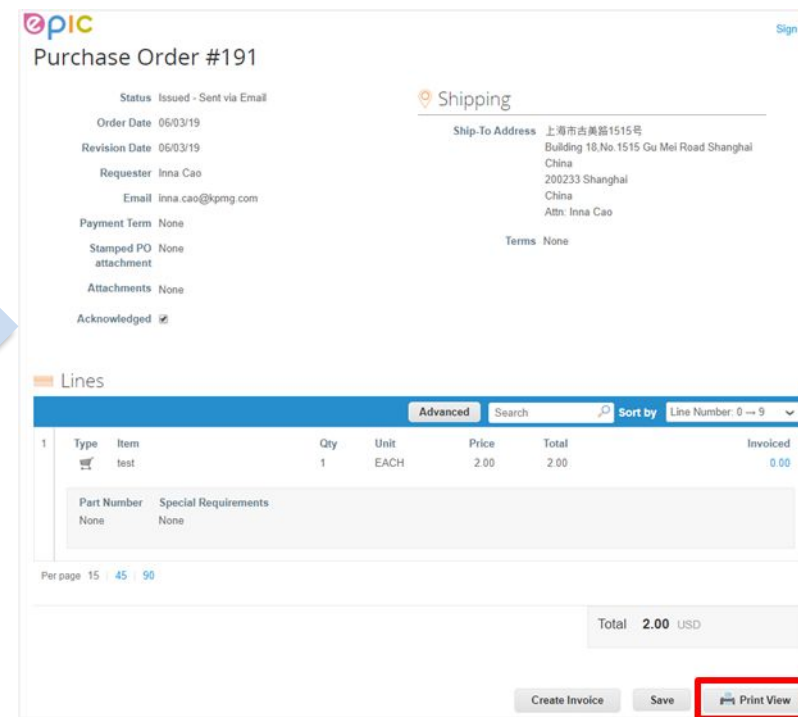
DATE: 06/03/19
 PAYMENT TERMS
 SHIPPING TERMS
 CURRENCY: USD
 CONTRACT
 CONTACT: Inna Cao, inna.cao@kpmg.com

Ship To: EPIC, 上海市古美路1515号, Building 18, No.1515 Gu Mei Road, Shanghai, China, 200233

Bill To: EPIC, Building 18, No.1515 Gu Mei Road, Shanghai, 200233, China, Attn: Ming Zhang

| Line | Description | Need By Date | Qty | Unit | Price | Total |
|------|-------------|--------------|-----|------|-------|----------|
| 1 | test | | 1 | EACH | 2.00 | 2.00 |
| | | | | | | 2.00 USD |

123456



epic Purchase Order #191

Sign Out

Status: Issued - Sent via Email

Order Date: 06/03/19
 Revision Date: 06/03/19
 Requester: Inna Cao
 Email: inna.cao@kpmg.com

Payment Term: None
 Stamped PO attachment: None
 Attachments: None
 Acknowledged:

Shipping

Ship-To Address: 上海市古美路1515号, Building 18, No.1515 Gu Mei Road, Shanghai, China, 200233, Shanghai, China, Attn: Inna Cao

Terms: None

Lines

Advanced Search Sort by Line Number: 0 - 9

| 1 | Type | Item | Qty | Unit | Price | Total | Invoiced |
|-------------|------|----------------------|-----|------|-------|-------|----------|
| | | test | 1 | EACH | 2.00 | 2.00 | 0.00 |
| Part Number | | Special Requirements | | | | | |
| None | | None | | | | | |

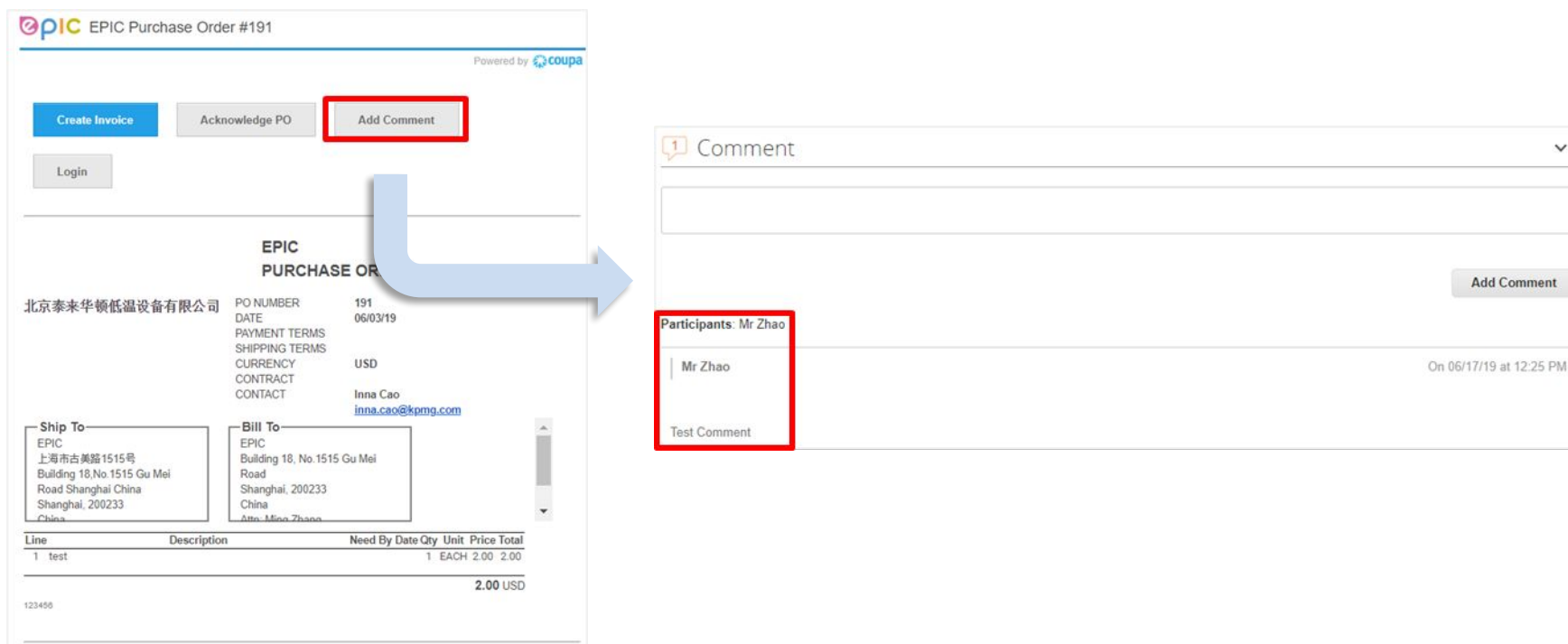
Per page 15 | 45 | 90

Total: 2.00 USD


Buttons: Create Invoice, Save, Print View

Add Comment to a Purchase Order via Email

- You can add comments to purchase orders received in your email by clicking the **Add Comment** button within the emailed purchase order.
- Once you click **Add Comment**, a separate browser tab or window will open up, and there will be a section at the bottom where you can type a comment and then click **Add Comment**. Once you've done this, the comment will be added to the purchase order and the requester will be notified.



EPIC Purchase Order #191

Powered by 

Buttons: Create Invoice, Acknowledge PO, **Add Comment**, Login

EPIC PURCHASE ORDER

北京泰来华顿低温设备有限公司

PO NUMBER: 191
DATE: 06/03/19
PAYMENT TERMS:
SHIPPING TERMS:
CURRENCY: USD
CONTRACT:
CONTACT: Inna Cao
inna.cao@kpmg.com

Ship To:
EPIC
上海市古美路1515号
Building 18, No. 1515 Gu Mei Road
Shanghai, China
Shanghai, 200233
China

Bill To:
EPIC
Building 18, No. 1515 Gu Mei Road
Shanghai, 200233
China
Attn: Miss Zhao

| Line | Description | Need By Date | Qty | Unit | Price | Total |
|------|-------------|--------------|-----|------|-------|----------|
| 1 | test | | 1 | EACH | 2.00 | 2.00 |
| | | | | | | 2.00 USD |

123456

Comment

Participants: Mr Zhao

Mr Zhao

Test Comment

On 06/17/19 at 12:25 PM

Add Comment



Sourcing

Sourcing

Introduction

- In addition to using the Coupa Supplier Portal (CSP), you may be invited to participate in a Sourcing Event with Air Liquide. This guide will help you view and interact with Sourcing Events for Air Liquide Requisitions, where quotes, additional information, or confirmation from the supplier is needed to create the PO.
- POs generated from a Sourcing Event can be viewed and acknowledged via your CSP account or via email.

Recap: Signing in to the CSP

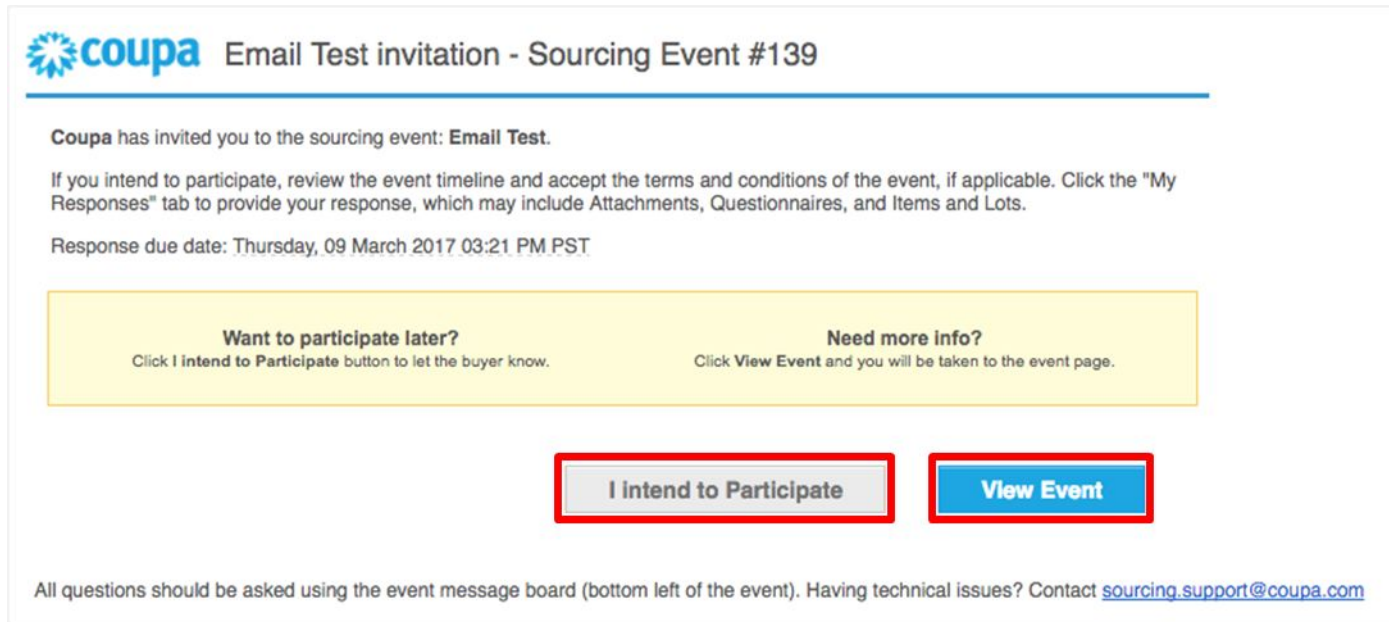
- Open your preferred browser
- a) **Activate your account:** You should have received an email invitation to join the Coupa Supplier Portal. Click on the direct link in your email invitation and follow the instructions provided. Once registered, you can log in to the CSP at <https://supplier.coupahost.com>.
- b) **Reset your account:** If you have forgotten your username or password, click on the link at the bottom of the login screen.


**Note: You do not have to log in to the CSP separately if you are using the action buttons from your PO or Sourcing Event Event invitation emails.*

Sourcing

View the Sourcing Event Invitation

- **You will receive an email to participate or view the Sourcing Event:**
- Similar to the PO emails, you will get a preview of the details and be able to click on either actionable buttons from the message and be redirected to the Event accordingly:
 - a) **I intend to Participate**
 - b) **View Event**



 Email Test invitation - Sourcing Event #139

Coupa has invited you to the sourcing event: **Email Test**.

If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Questionnaires, and Items and Lots.

Response due date: Thursday, 09 March 2017 03:21 PM PST

Want to participate later?
Click **I intend to Participate** button to let the buyer know.

Need more info?
Click **View Event** and you will be taken to the event page.

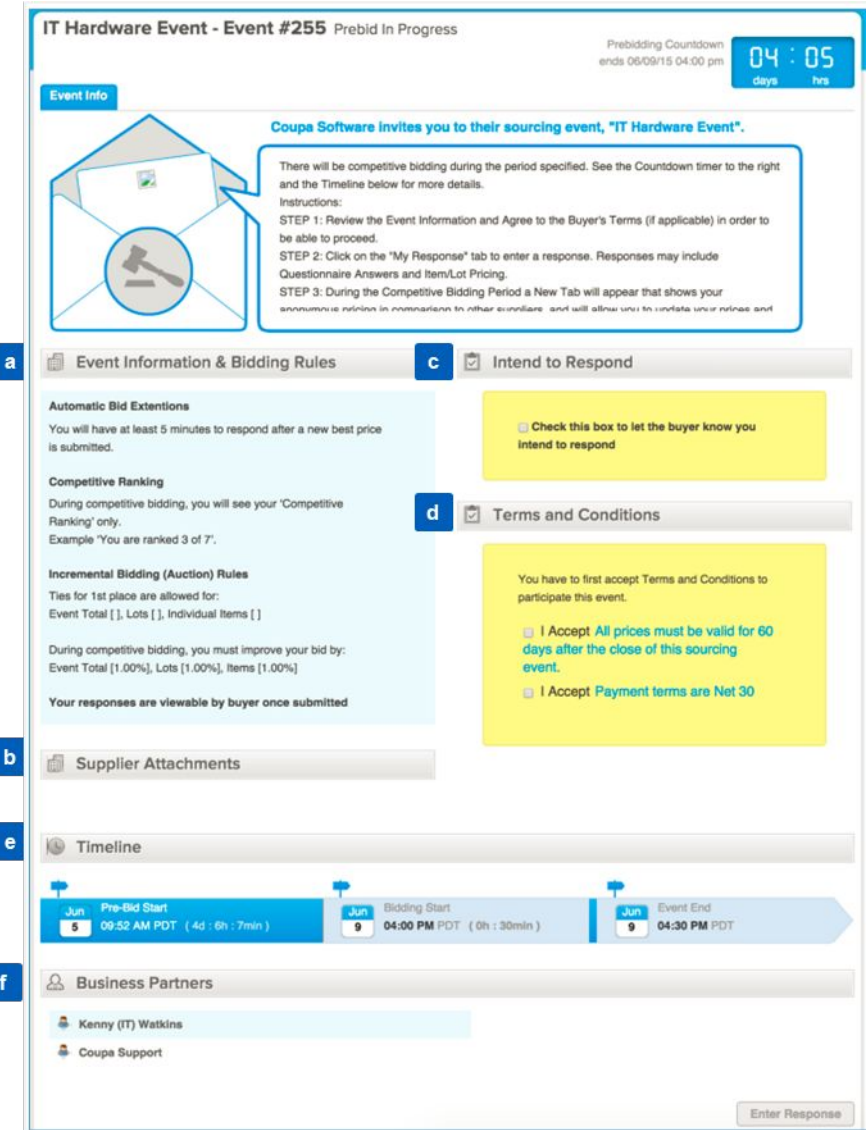
I intend to Participate **View Event**

All questions should be asked using the event message board (bottom left of the event). Having technical issues? Contact sourcing.support@coupa.com

Sourcing

Begin to Interact with the Event

- **On this page, you will see a variety of details related to the Sourcing Event:**
 - a) Event Information & Bidding Rules – this section will detail basic information regarding the event (multiple bids allowed, reverse auction details, etc.)
 - b) Buyer Attachments – If Air Liquide has provided any additional information as an attachment for you to view, it will show here
 - c) Intend to Respond – Marking this box will alert Air Liquide that you intend to respond to this event
 - d) Terms and Conditions – This will list any T&Cs related to this event or for Air Liquide in general. If there are T&Cs present, you must accept them before you are allowed to enter a response
The 'Enter Response' button at bottom right of screen will be grayed out until this is marked
 - e) Timeline – Indicates the start and end timeline of the event
 - f) Event Team – Lists the team from Air Liquide who are working on this event



IT Hardware Event - Event #255 Prebid In Progress

Prebidding Countdown ends 06/09/15 04:00 pm **04 : 05** days hrs

Event Info

Coupa Software invites you to their sourcing event, "IT Hardware Event".

There will be competitive bidding during the period specified. See the Countdown timer to the right and the Timeline below for more details.

Instructions:

STEP 1: Review the Event Information and Agree to the Buyer's Terms (if applicable) in order to be able to proceed.

STEP 2: Click on the "My Response" tab to enter a response. Responses may include Questionnaire Answers and Item/Lot Pricing.

STEP 3: During the Competitive Bidding Period a New Tab will appear that shows your automatic pricing in comparison to other suppliers and will allow you to update your prices and

a **Event Information & Bidding Rules**

c **Intend to Respond**

Automatic Bid Extensions
You will have at least 5 minutes to respond after a new best price is submitted.

Competitive Ranking
During competitive bidding, you will see your 'Competitive Ranking' only.
Example 'You are ranked 3 of 7'.

Incremental Bidding (Auction) Rules
Ties for 1st place are allowed for:
Event Total [], Lots [], Individual Items []

During competitive bidding, you must improve your bid by:
Event Total [1.00%], Lots [1.00%], Items [1.00%]

Your responses are viewable by buyer once submitted

d **Terms and Conditions**

You have to first accept Terms and Conditions to participate this event.

I Accept All prices must be valid for 60 days after the close of this sourcing event.

I Accept Payment terms are Net 30

b **Supplier Attachments**

e **Timeline**

Jun 5 09:52 AM PDT (4d : 6h : 7min) Pre-Bid Start

Jun 9 04:00 PM PDT (0h : 30min) Bidding Start

Jun 9 04:30 PM PDT Event End

f **Business Partners**

Kenny (IT) Watkins

Coupa Support

Enter Response

Sourcing

Create Response

- Once you click Enter Response, you will be brought to a page to enter your response.

- **Complete your Event response:**
 - a) Enter a **Name** of your response
 - b) Review any **Attachments** or **Questionnaires** from Air Liquide included with the Sourcing Event


*If a response is required, it will be indicated with a red asterisks**
 - c) Hover over each item and click to edit for your response (the **Pencil** icon appears for editable item information)
 - d) Confirm and complete the item information*
 - Be sure to enter attachments, if necessary
 - Select **Click to View** under Attachments to choose and view attachment options
 - **Questionnaire** will list any required Response Questionnaire(s)
- e) Click **Save Item** when done with your item response

IT Hardware Event - Event #255 Prebid In Progress

Prebidding Countdown ends 06/09/15 04:00 pm **04:04** Days Yes


Event Info **My Response**

My Company Info

My Company Name Zones
My Logo 
Add image in JPEG or PNG formats

My Response

Attachments

Document from Kenny (IT) Watkins Your Response
Locations List Your Response
 Choose File No file chosen

Questionnaires

1. General Business

Please answer the questions below.

*1.1. Do you have any existing or potential conflicts of interest, direct or indirect with our company?
 Yes

*1.2. Within the past 5 years, has your company been involved in any lawsuits?
 Yes
 No

*1.3. In the past 5 years, has your company experienced any of the following?
 Major debt restructure
 Bankruptcy proceedings
 None of the above

Items and Lots

| Name | Expected Quantity | My Price | Price x Expected Qty |
|---|-------------------|------------------------------|----------------------|
| Name Not In Lots (3 Items) | | | |
| Lenovo ThinkPad XE1 Tablet | 100 | x <input type="text"/> USD * | 0.00 USD |
| Lenovo ThinkPad keypad | 100 | x <input type="text"/> USD * | 0.00 USD |
| Logitech Proteus Core G502 - 11-Btn Mouse - Wired - USB | 100 | x <input type="text"/> USD * | 0.00 USD |
| Total | | | 0.00 USD |

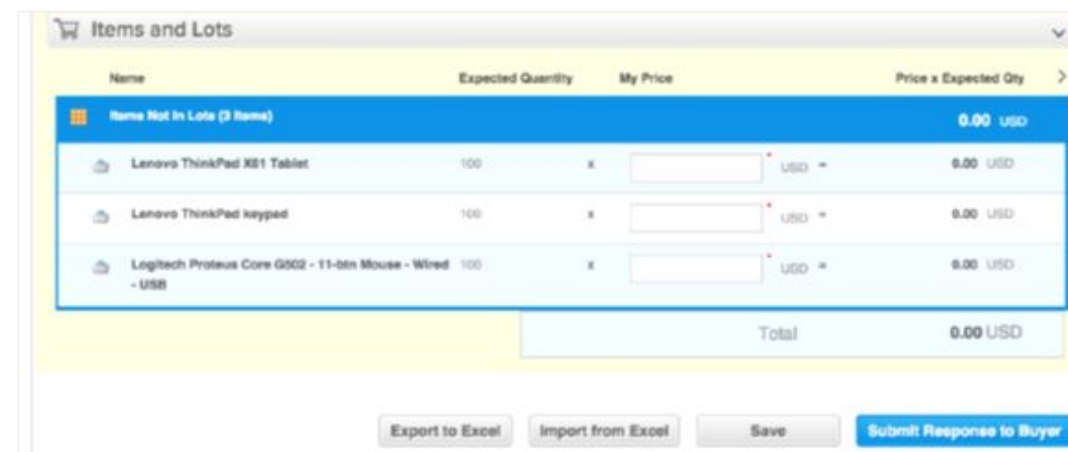
Export to Excel Import from Excel Save **Submit Response to Buyer**

Sourcing

Submit Response and View Status

- All saved items in the Sourcing Event will be listed for your review before submission.
- In addition to submitting your response, you can also do the following actions from this page:
 - a) Click on any items to view or edit
 - b) **Export** the Sourcing Event to **Excel**
 - c) **Import** response changes **from Excel**
 - d) **Load** the Sourcing Event **History**
 - e) **Save** the entire response
- When your entire response is complete, click **Submit Response to Buyer** for the Buyer to evaluate for awarding.
- If the Buyer is allowing multiple responses for this event, you will be able to **Edit Response** and resubmit.

You will know if this is allowed from the “Event Information & Bidding Rules” on the landing page.



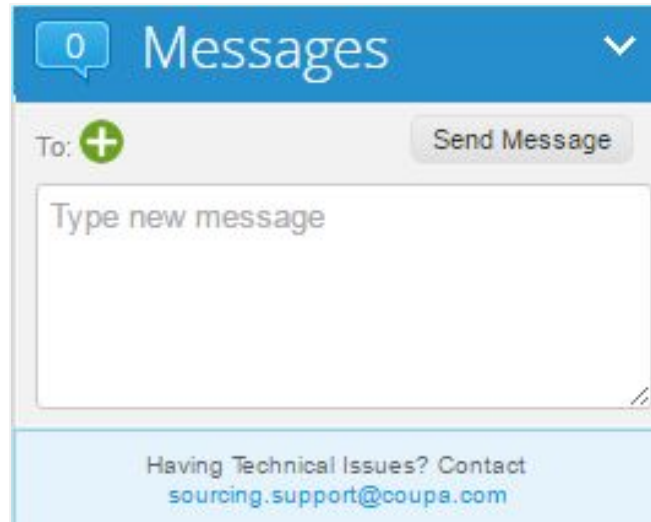
| Name | Expected Quantity | My Price | Price x Expected Qty |
|---|-------------------|--------------------------|----------------------|
| Items Not in Lots (3 Items) | | | |
| Lenovo ThinkPad X81 Tablet | 100 | <input type="text"/> USD | 0.00 USD |
| Lenovo ThinkPad keyboard | 100 | <input type="text"/> USD | 0.00 USD |
| Logitech Proteus Core G502 - 11-0tn Mouse - Wired - USB | 100 | <input type="text"/> USD | 0.00 USD |
| Total | | | 0.00 USD |



Sourcing

Interact with Buyer vis Messaging system

- At any point in this sourcing process, you may view or submit messages using the Messages portal located on the bottom left of the screen.





Support

Support

Next Steps for Supplier Enablement

- Make sure to accept the Coupa Supplier Portal email invitation successfully.
- Distribution beginning one week before Go-Live on **Monday, Aug 5th, 2019**
- Verify CSP profile and account information after invitation acceptance.
- You will receive Purchase Orders sent by Coupa from **Monday, Aug 12th, 2019 in China / Monday, Aug 19th, 2019 in Japan.**
- If your mailbox belongs to **126, 163, or QQ mailbox**, Coupa messages may be automatically marked as **spam**. Please check your junk mailbox in time to avoid missing purchase orders.

Support

Additional Resources

The purpose of this training is to review best practices and provide a training overview for working with Air Liquide via Coupa. This group will not be addressing other potential areas of interest, such as Coupa punch-out.

- **Air Liquide page:** <https://www.airliquide.com/cn/china/gong-ying-shang>
 - CSP Guide
 - Quick Guide
 - SAN/Email Guide
 - Videos
 - FAQ
- **General Information for Coupa Supplier Portal (CSP):** https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal
- **Coupa Supplier Portal Log In:** <https://supplier.coupahost.com/>
- **Supplier Enablement:** If you have any question or any willingness to set up a punch-out or supplier hosted catalog, please contact Air Liquide's Coupa Procurement Team below : cnproc-public@airliquide.com
- **Legacy POs should continue to be processed using your legacy (pre-Coupa) process**

Status List

Below lists all of the PO, ASNs, Invoices and Catalog statuses in Coupa Supplier Portal (CSP):

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

| ASNs Statuses | |
|--------------------|--|
| Status | Description |
| Draft | The ASN has been created, but it hasn't been submitted to your customer. |
| Cancelled | The ASN has been cancelled. |
| Partially Received | The customer has received a part of your shipment. |
| Pending Receipt | The customer is waiting for the shipment. |
| Received | The customer has received your shipment. |

| Catalogs Statuses | |
|----------------------------|--|
| Status | Description |
| Draft | The catalog has been created, but may be missing information necessary to send it to the customer. |
| Awaiting/ Pending Approval | The catalog has been received by your customer, but it has not gone through the approval chain yet. |
| Accepted | The catalog has been accepted by your customer, and all the items in it are now available for purchase within Coupa. |
| Rejected | The catalog has been rejected. Contact your customer to find out why, and then resubmit. |
| Error | There's something wrong with the catalog. Contact your customer to get the catalog back on track. |

Coupa Supplier Quick Start Guide

Quick Start Guide - Supplier

Introduction

You will find the Coupa Supplier Portal, very easy to use. This guide will help you to create a catalog, view POs and create Invoices.

Signing-in


1. **Activate your account:** You should have received an email invitation to join the Coupa Supplier Portal. Follow the instructions provided. You can also register directly on <https://supplier.coupahost.com>
2. **Reset your account:** If you have forgotten your username or password, click on the link at the bottom of the Sign In screen.

Edit Your Company Info

The first thing you should do is complete your Public Profile. Select the Company Info tab and click Edit. Ensure all mandatory fields are filled in then click Save. Your public profile is visible to ALL Coupa customers, not just customers with whom you are connected.

Add users:
You can add users to access your supplier account and perform all tasks:

1. Under Company Info, select User Accounts. Then click on Invite an Employee.
2. Enter the employee's email address in the text box provided and click on Send Invitation. They will receive an email with instructions to activate their account.
3. You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
4. You can delete a user by clicking on the Delete icon under the Actions column.

 When enabled for a given customer, a user can access all POs and create Invoices for that customer.

Configure Customers

Settings for PO delivery Option and Punchout are maintained individually for each customer. You can also setup specific customer profiles:


1. Click on the customer tab (labeled with your customer's name).
2. Edit the information under the Profile section. You can select to compare with other profile to easily copy information across.

Set PO Delivery Preference:

1. Under the customer name tab, select PO Delivery.
2. Enter your Email or cXML configuration details. You will still be able to view POs on the CSP.



Configure Punchout Site:

1. Under the customer name tab, select Punchout.
2. Enter the customer Punchout configuration details. It will be effective immediately.

 If your customer chooses to receive updates, this information is automatically propagated to the customer's Coupa environment.

View Orders

Regardless of the PO delivery preference set, you will also have access to POs within the Coupa Supplier Portal. To view customer orders:


1. Select the customer name tab, then click on Purchase Orders.
2.  Click on the PO# to view the PO.
3. To acknowledge a PO, tick the Acknowledged check box.
4.  You can print the PO by clicking on Print View.

Create Invoice

Not enabled for Air Liquide China suppliers

Manage Catalogs

In order for your customers to buy products or services from you, you need to have an agreed Catalog in place.

1.  **Create Catalog:** Click on the customer tab and select Catalogs. Click on Create. You can set start and expiry dates.
2. **Submit Catalog:** When you have included all the items required click on Submit to buyer. This automatically sends a notification to the buyer to review the catalog and approve. You can view the status in realtime in the Catalogs view. Once the catalog is approved, your products and services are immediately available to your customer's employees.

Tips

Creating Invoices

Not enabled for Air Liquide China suppliers

Managing Catalogs

- Once a catalog is accepted, it cannot be edited. You can create and submit new catalogs to reflect changes in price or product/service offering.

Does your company have more than one CSP account? Merge them!

- On your Home page you will see a list of accounts that you can request to merge. Click on Merge. Add a comment in the text box (this will be sent to the other account's owner) and then click Send Request. Have the other account owner log in and on their Home page, click on Merge then Accept on the next screen.

MORE INFORMATION

For more resources, visit the Coupa Online Training



Support

Summary

- Coupa centralizes Air Liquide's procure-to-pay processes and practices, providing our strategic supplier relationships bringing about additional several benefits.
- Suppliers online capabilities have been expanded: Receive/acknowledge Purchase Orders, and create hosted catalogs (if enabled on CSP).
- Supplier expectations: Working online (no paper) to review and acknowledge Purchase Orders, ensure that purchase order information can be directly corresponding to the invoice.
- When the purchase order amount matches the receipt amount and the invoice amount, the invoice will be automatically paid (according to the payment method set by Air Liquide); no follow-up action by Air Liquide staff is required (to ensure the timeliness of payments).



Thank You!

Shanghai • 2019
Procurement Performance Team • APAC Hub Procurement

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