Coupa Supplier Portal (CSP)

Supplier Training Guide

July 2019

Shanghai • 2019
Procurement Performance Team • APAC Hub Procurement

DISTRIBUTION LIST : APAC

Agenda

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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 <u>free</u>. There is no cost for suppliers.

Air Liquide — Catalogs, Workflow → **coupa** — PO, PO Change → **Suppliers**

coupa — PO Acknowledgement ← **Suppliers**

3-way Match ← **coupa**

Invoice (Offline) ← **Suppliers**

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
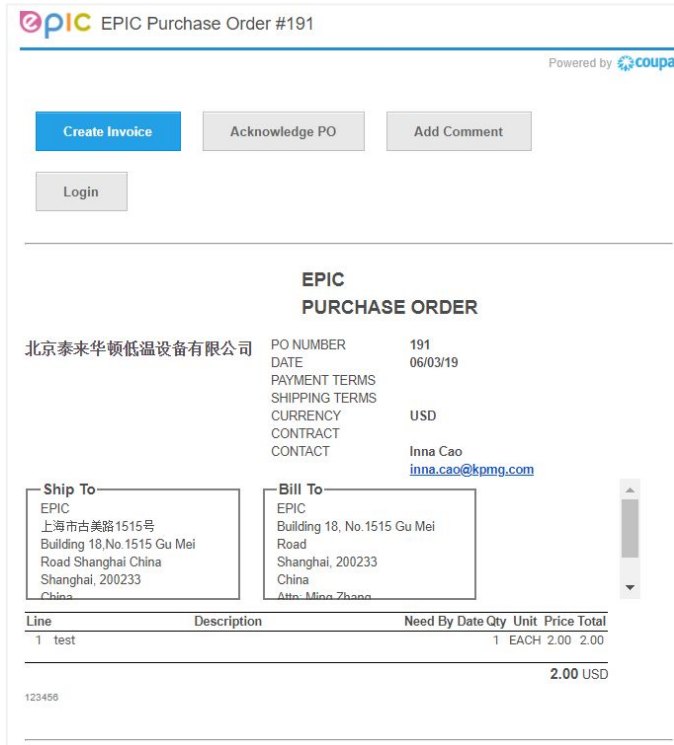- Reduced manual paper transaction processing

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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
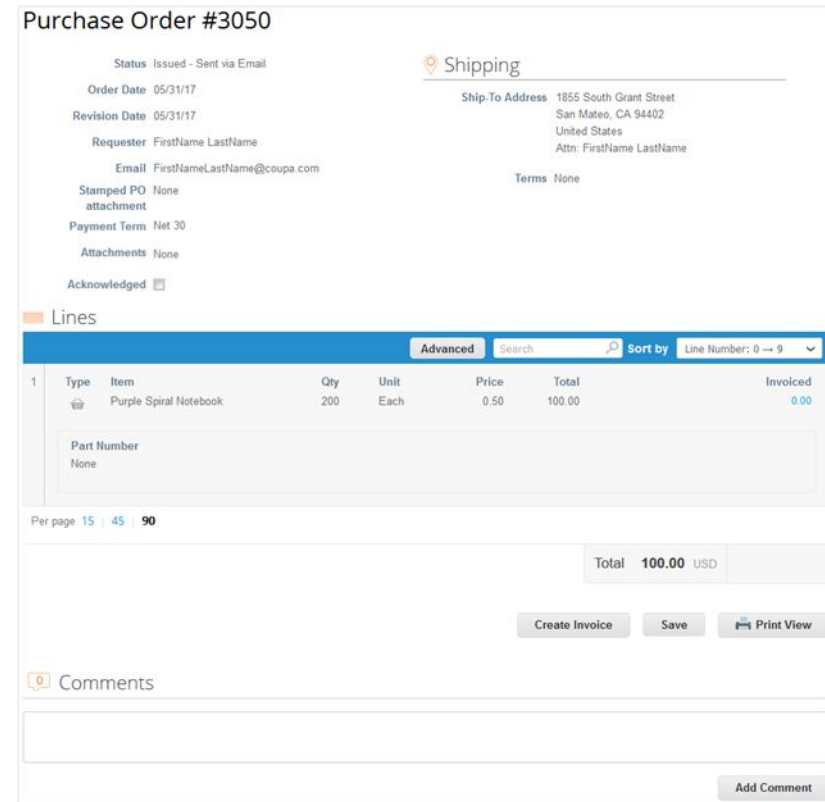
2. Through Coupa Supplier Portal (CSP)

OR

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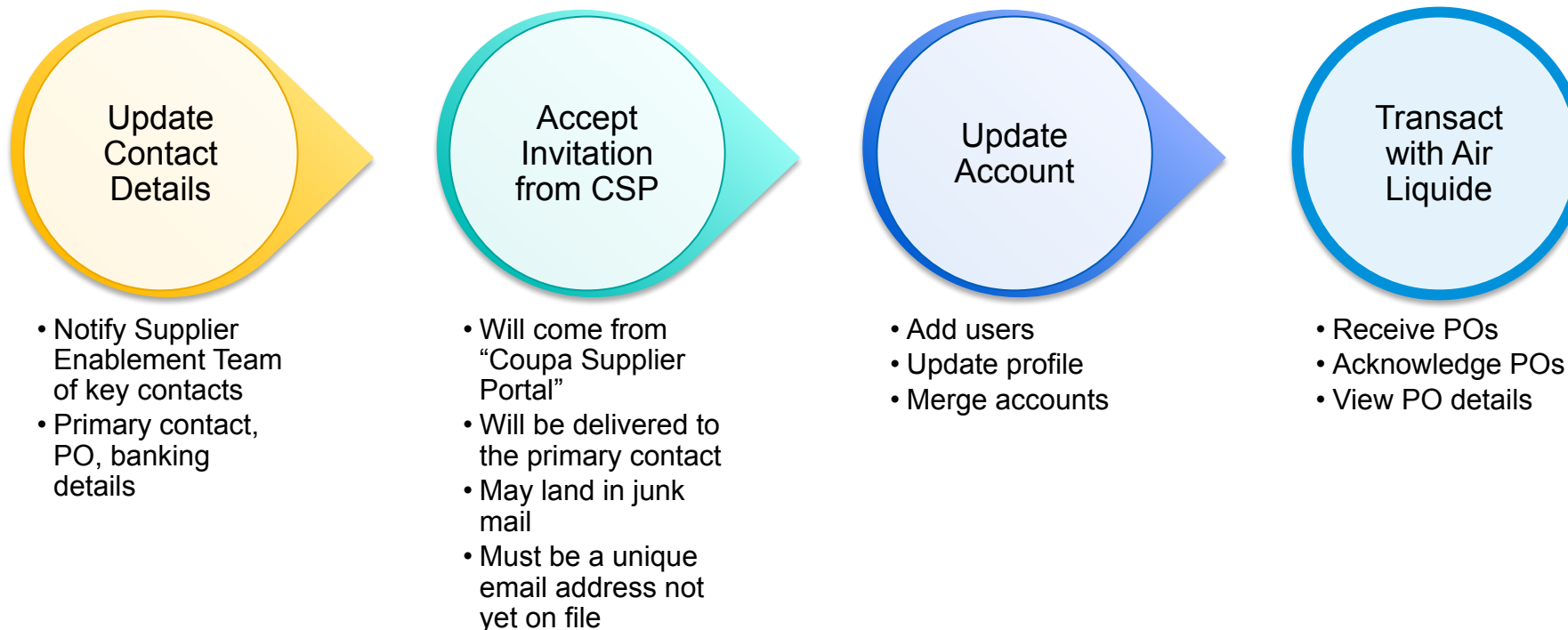# Registration and Setup

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

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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:

Update Contact Details

- Notify Supplier Enablement Team of key contacts
- Primary contact, PO, banking details

Accept Invitation from CSP

- Will come from "Coupa Supplier Portal"
- Will be delivered to the primary contact
- May land in junk mail
- Must be a unique email address not yet on file

Update Account

- Add users
- Update profile
- Merge accounts

Transact with Air Liquide

- Receive POs
- Acknowledge POs
- View PO details

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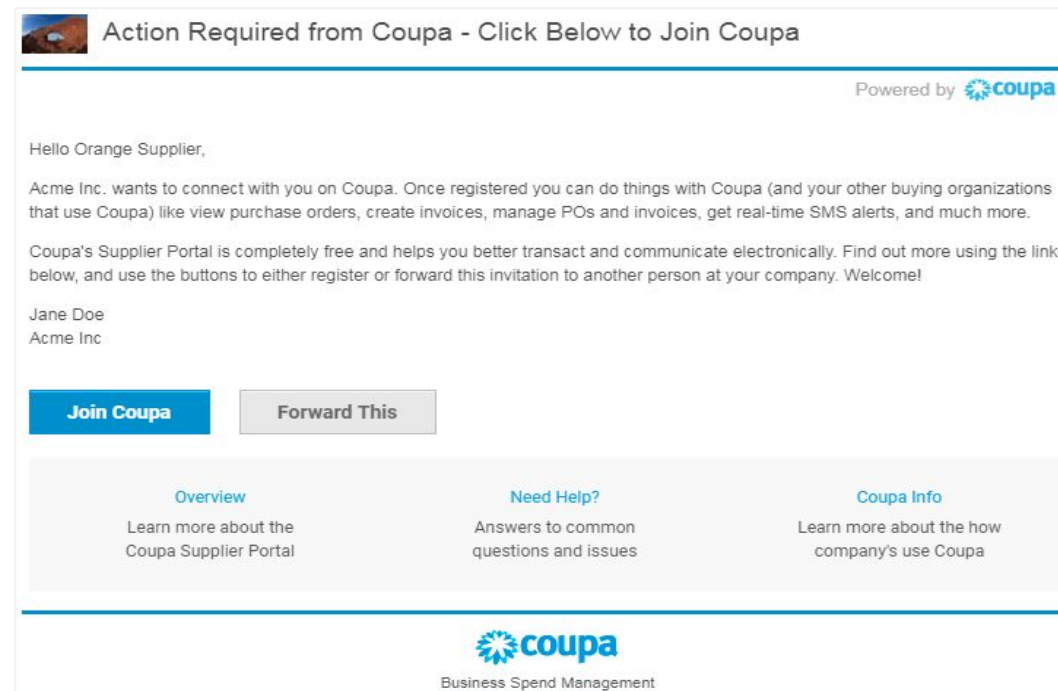
How to join Coupa Supplier Portal (CSP)? (2/2)

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.

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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.)

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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.)

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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.

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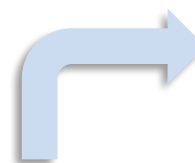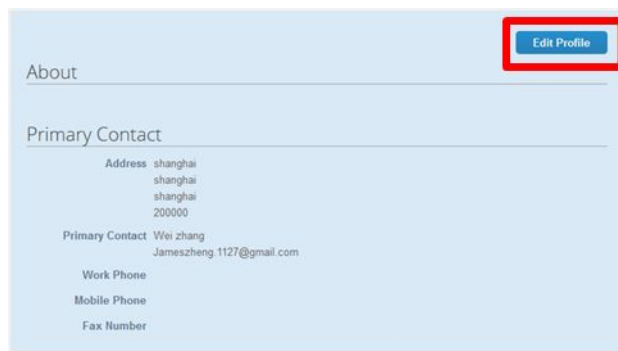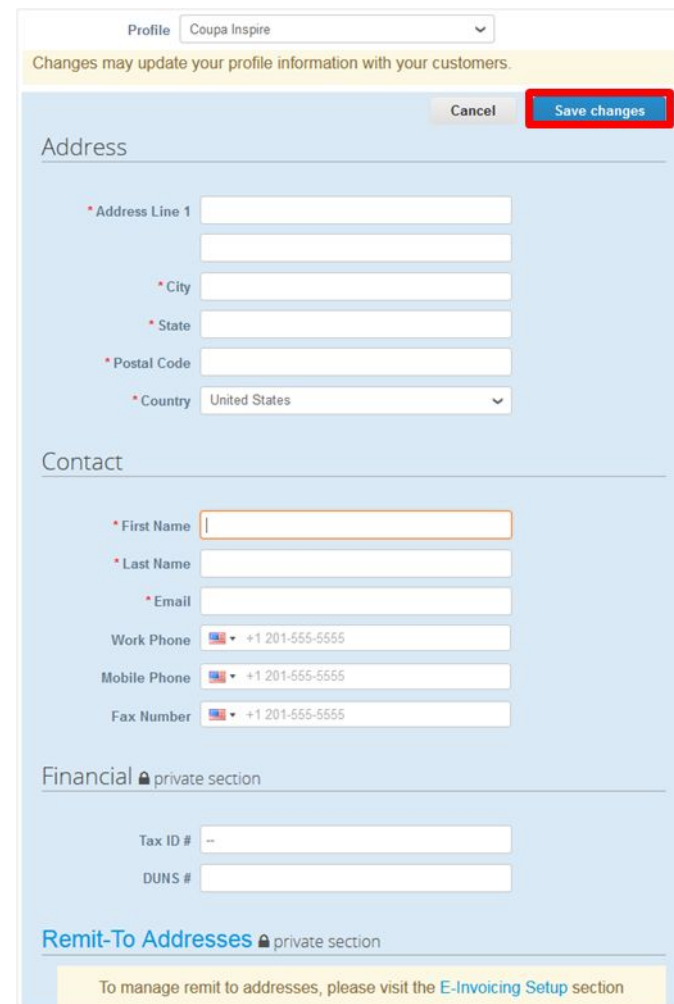
Completing Public Profile

Edit Company Info.

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

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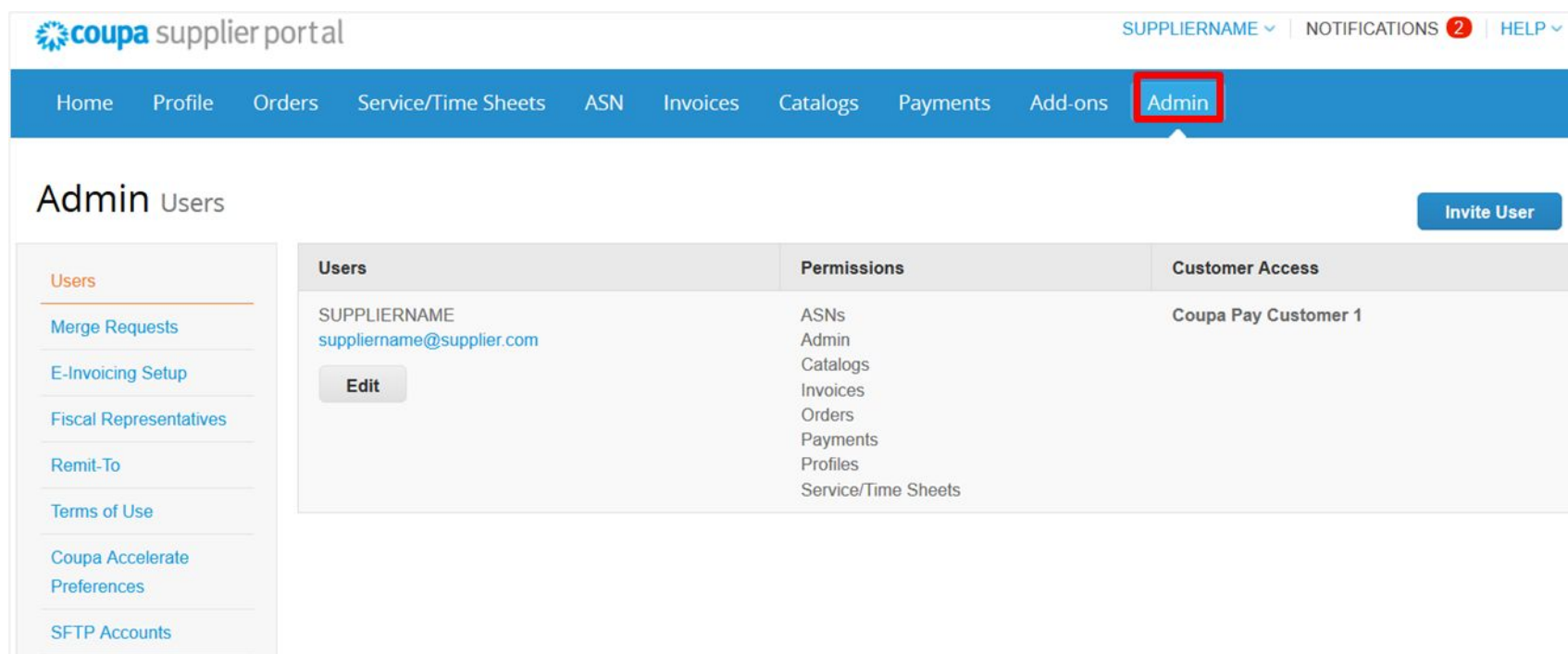
Updating the Admin Settings

- 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.

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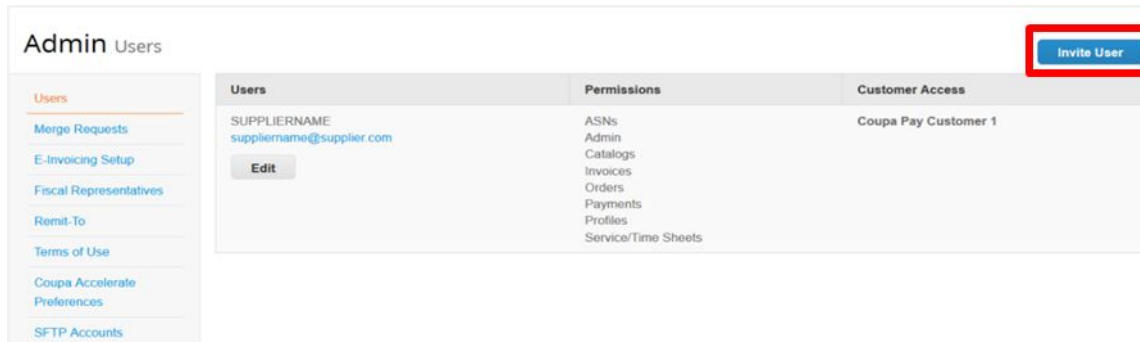
Adding Users

Add 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

Editing Users

Edit Existing 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.

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Purchase 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.

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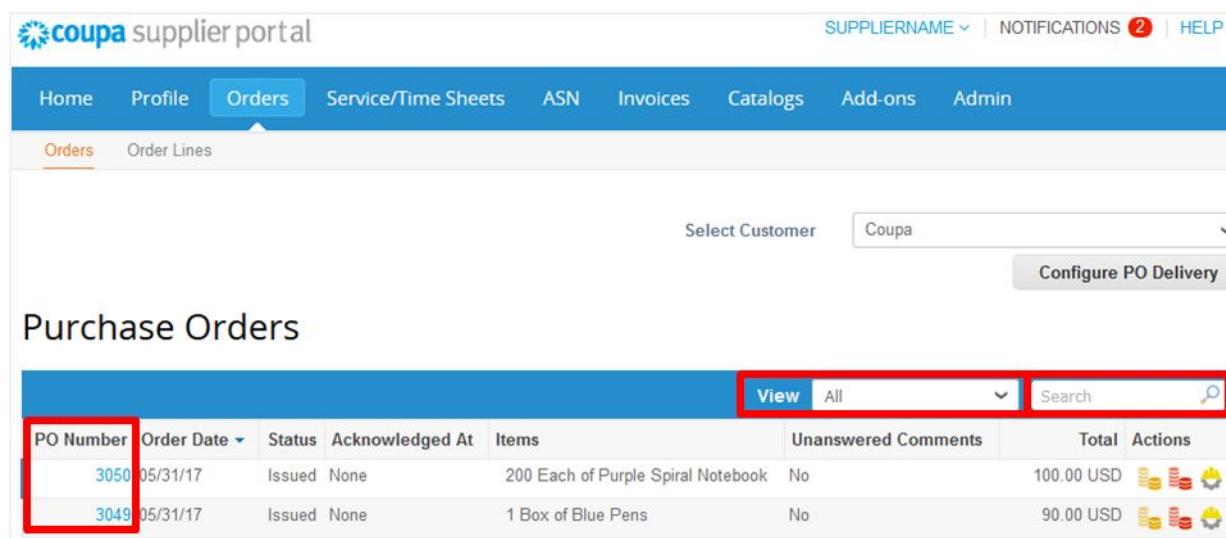
Receive & View Orders (1/2)

- Regardless of the PO delivery preference set, you will have access to POs within CSP.

- Select **Orders** from the top menu bar.
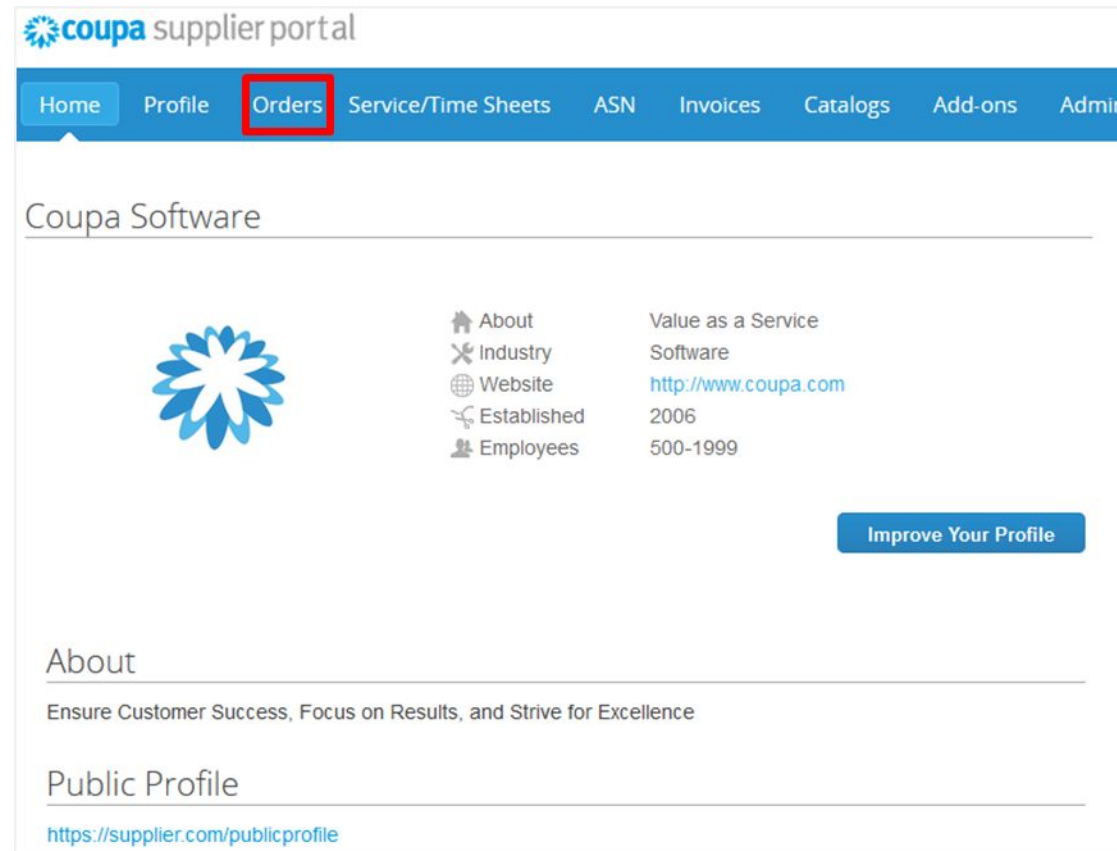
Receive & View Orders (2/2)

- 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**.

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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.

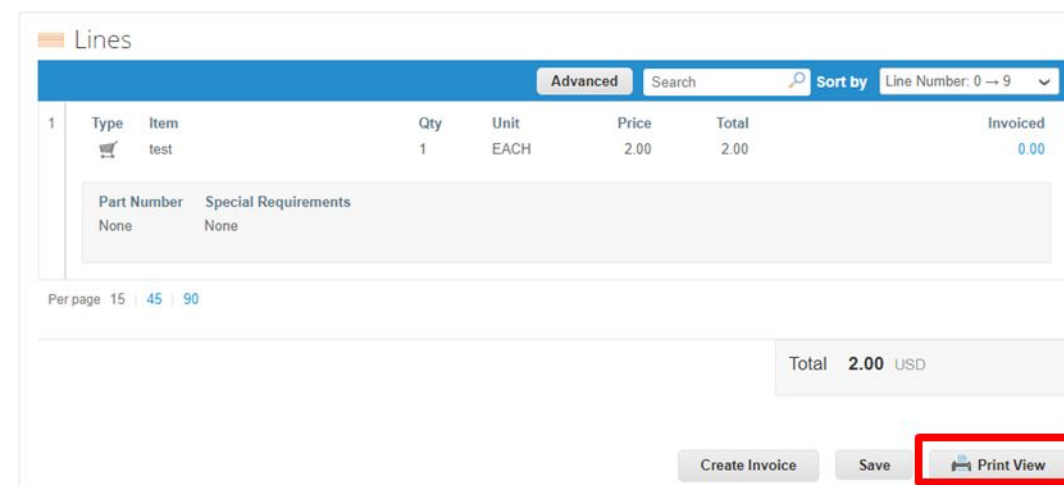▪ You can print the PO in PDF version by clicking **Print View**.

PO view screen continued

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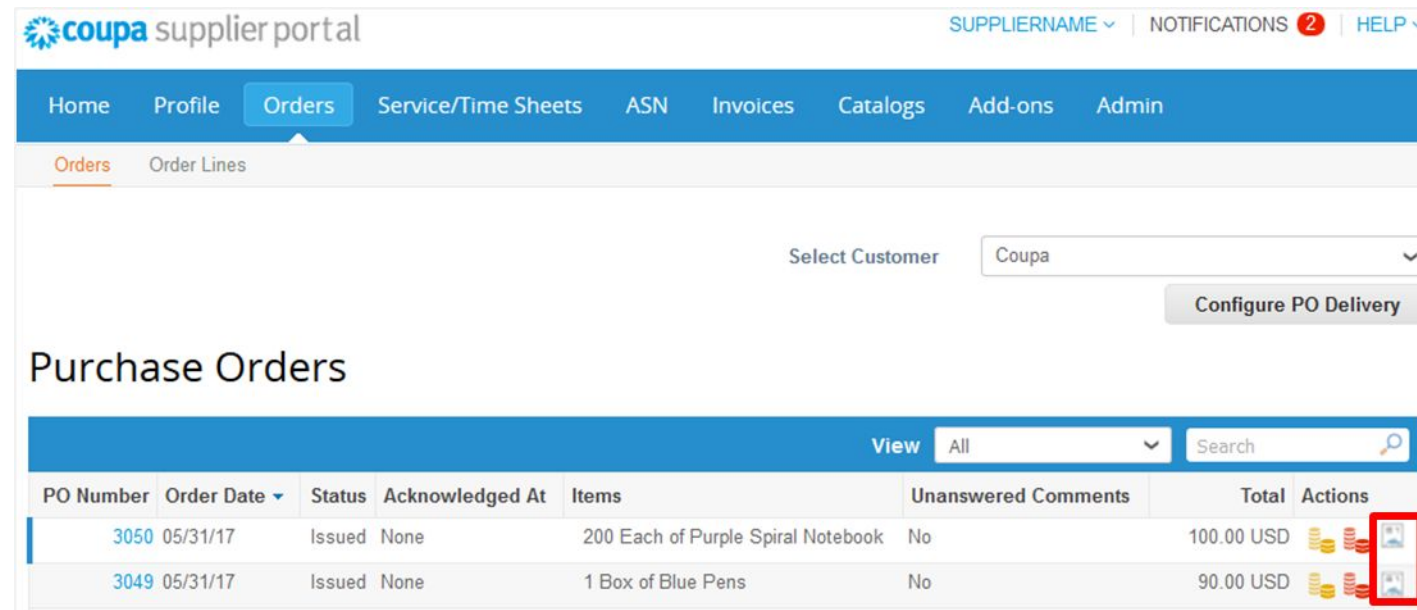
Create or Edit an ASN (1/2)

- 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.

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.

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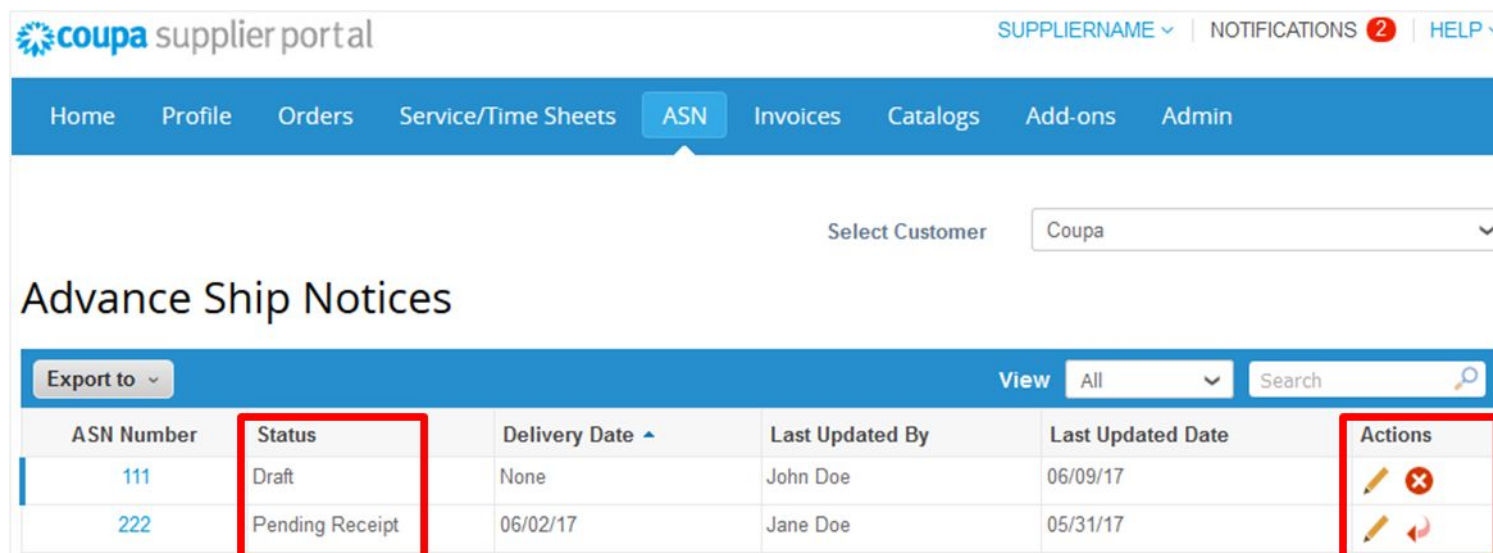
View and Manage ASNs

- 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**.

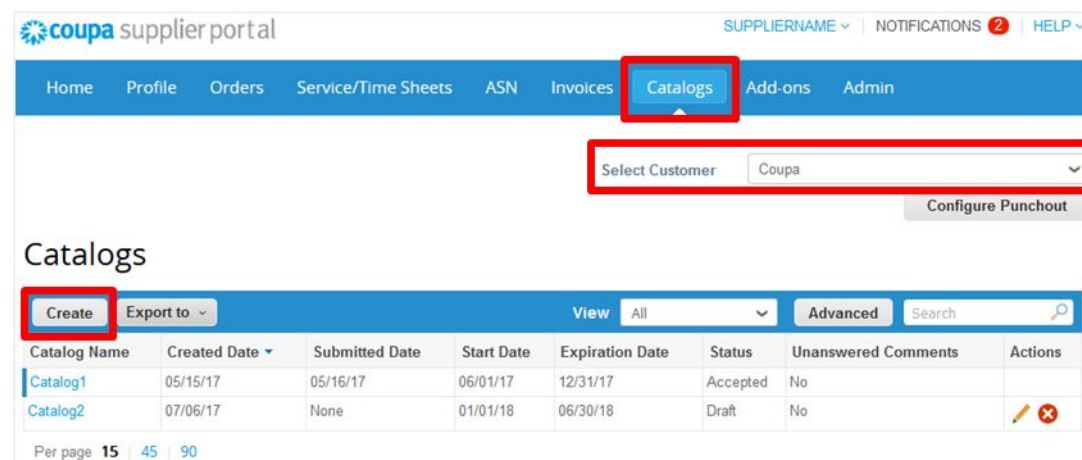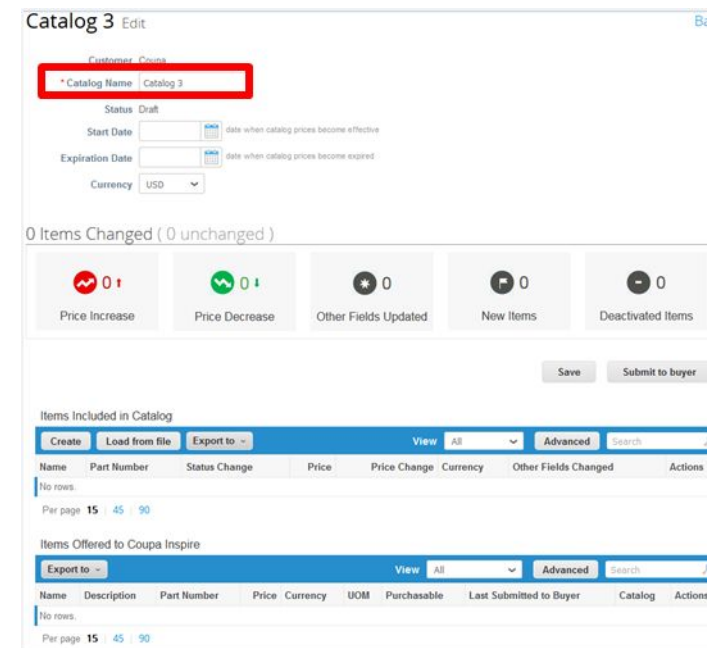# Catalogs

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.

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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, your 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.

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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**.

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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.

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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.

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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 🖉 icon to update the catalog items information.

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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.

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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.

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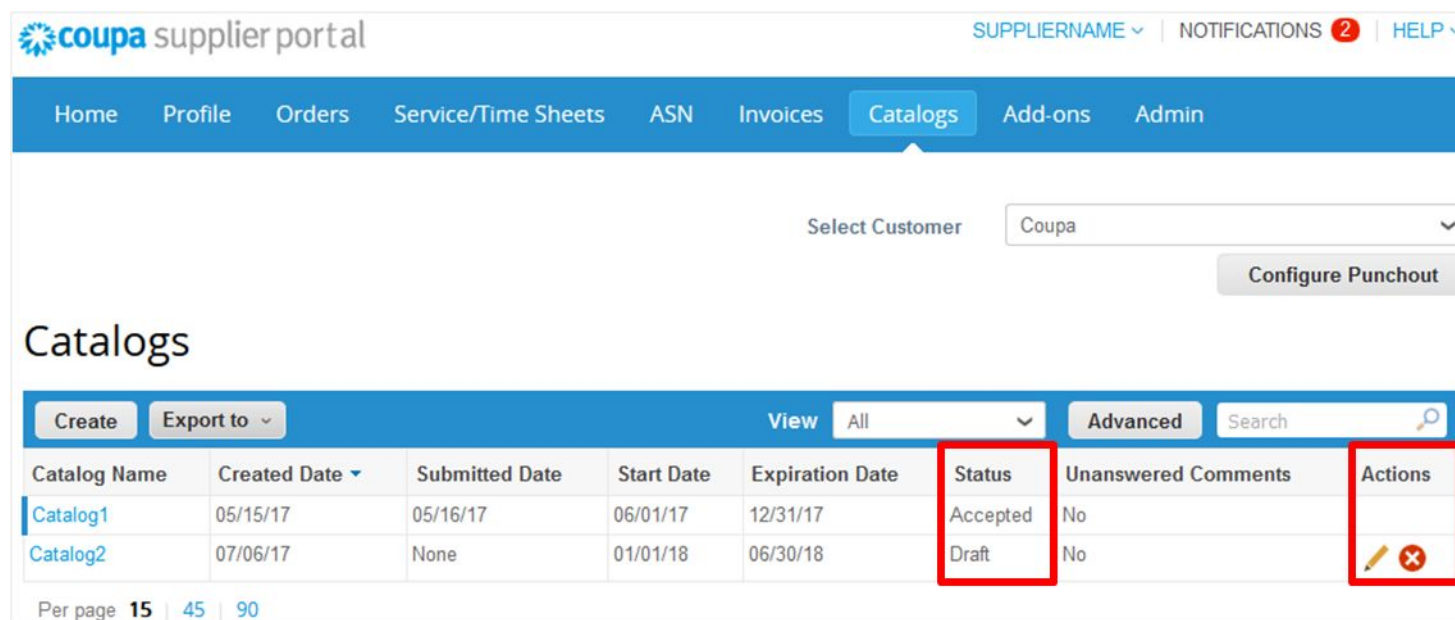
View and Manage Catalogs

- 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.

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SAN/Email

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.

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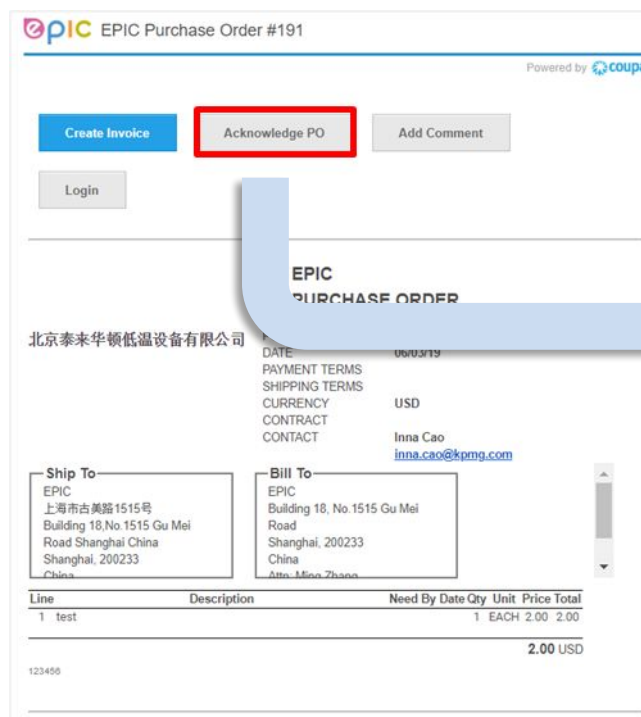
Acknowledge a Purchase Order via Email

- 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**.

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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.

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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
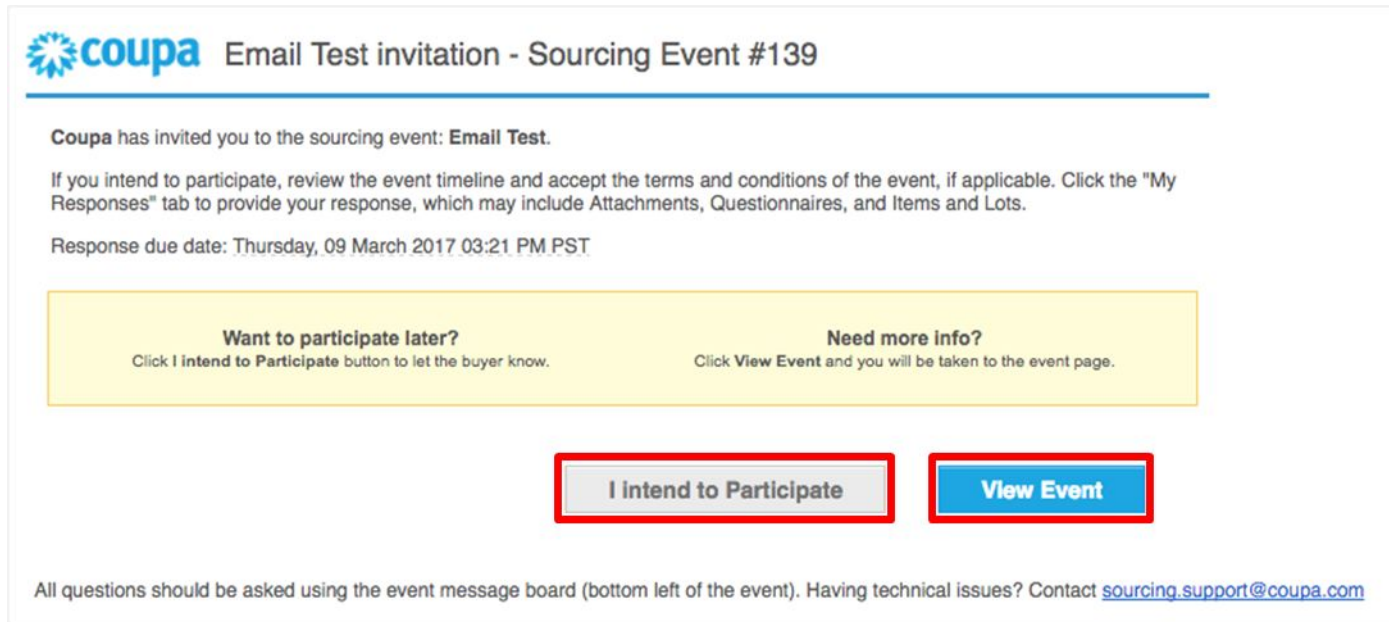
- Open your preferred browser

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.

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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**

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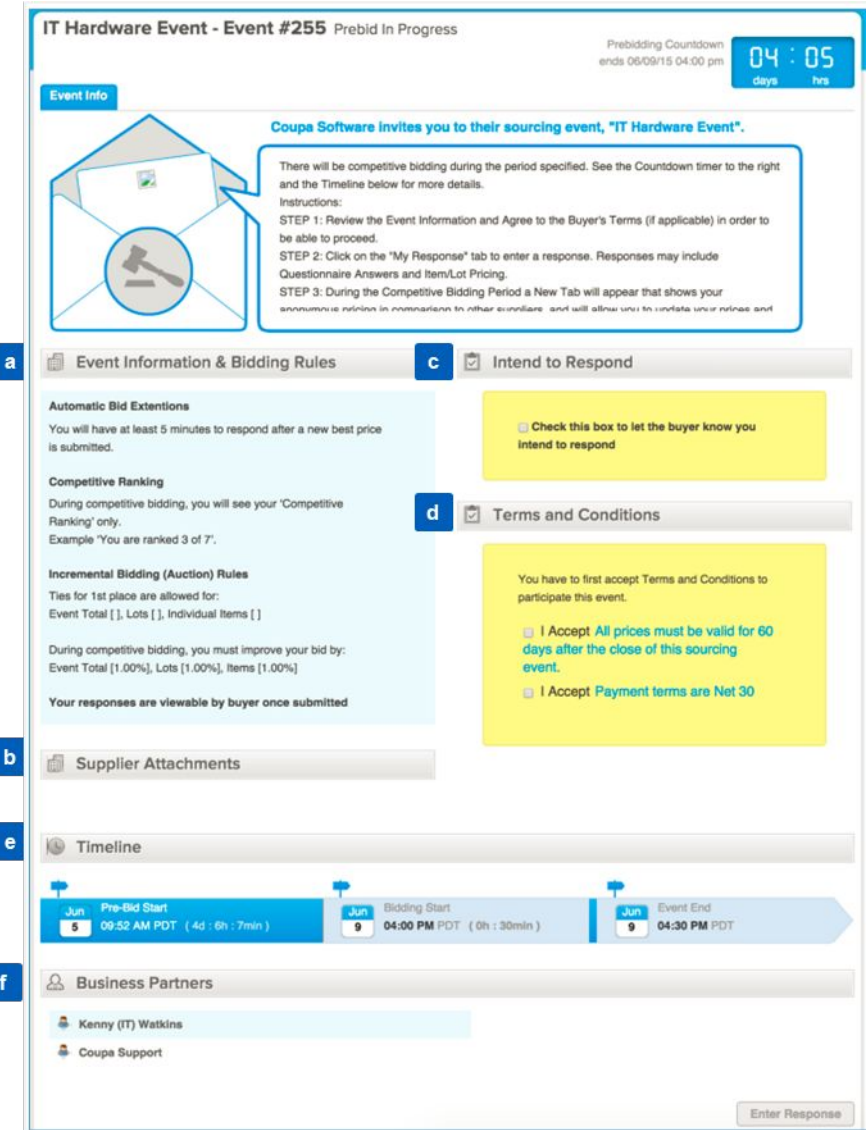
Begin to Interact with the Event

- **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

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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

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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.

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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.
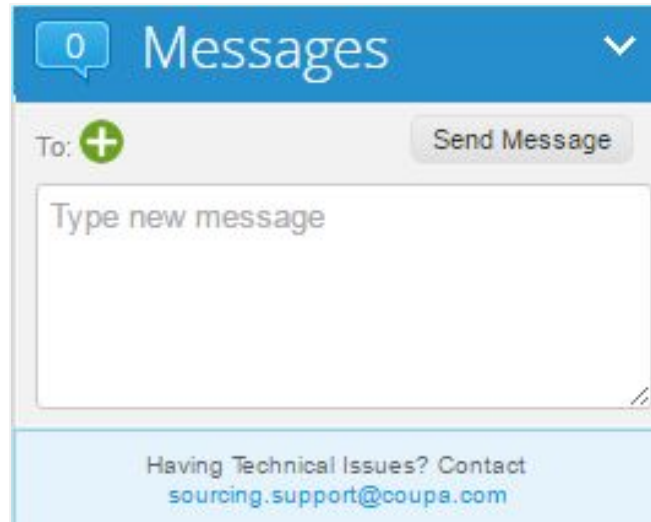
Support

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.

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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**

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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. Sumit 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 you 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

✳ coupa

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).

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Thank You!

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