# Coupa Supplier Training Guide

June 2024

# Agenda

# Introduction to Coupa

# What is Coupa?

- Coupa is a cloud or e-procurement platform for business spend; delivering measurable value through real-time spend visibility, control, compliance, and agility.

- Gartner, the world's leading research and advisory company, ranked Coupa as number 1 in Procure-to-Pay (P2P) suites for the 5th time in a row in 2020.

- One of the criteria that ranked Coupa as number 1 is its high user adoption

- 3 major releases or upgrades per year that are FREE of charge

coupa
BUSINESS SPEND MANAGEMENT

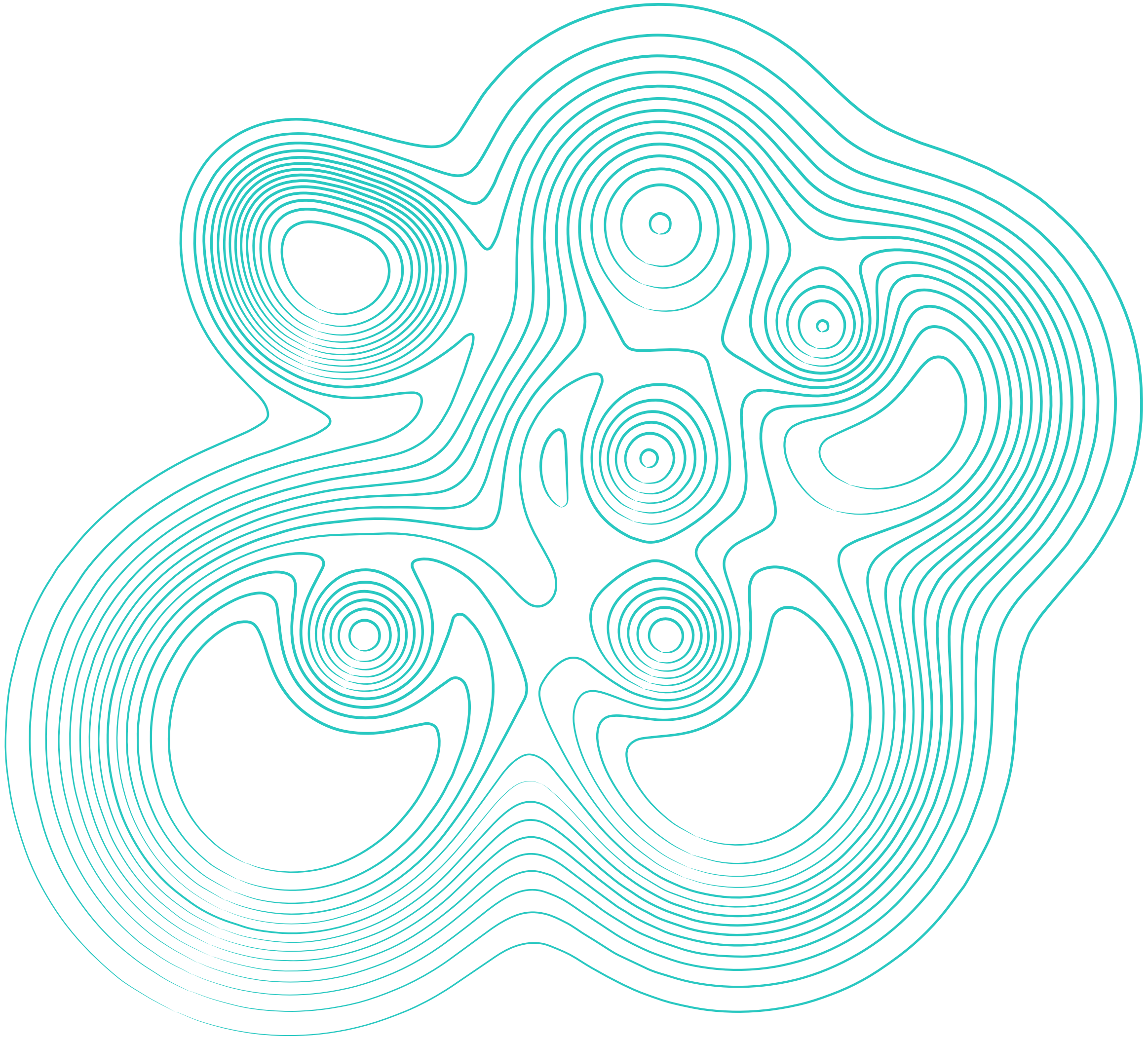
# Suppliers will use 2 portals within Coupa

| Attributes *(from Supplier POV)* | #1 Sourcing Response Portal | #2 Coupa Supplier Portal |
|---|---|---|
| **Purpose** | **Participate in Worley sourcing events** (i.e., submit bids, proposals, or responses to Worley RFx events) | **Efficiently conduct business with Worley** (i.e., interact with buyers and manage various aspects of their relationship beyond sourcing events) |
| **Functionality** | Suppliers can:<br>• View and respond to sourcing events<br>• Attach relevant documents<br>• Communicate with buyers<br>• Track the status of their responses | Suppliers can:<br>• Manage supplier information<br>• Update profile and payment information |
| **Focus** | Enabling suppliers to engage in sourcing activities and respond to RFx events efficiently | Interface to interact with buyers across different procurement processes & transactions including sourcing and supplier management (and purchasing + invoicing potentially in the future) |
| **User Role** | Suppliers are main users | Suppliers use to collaborate with buyers |
| **Account Mgmt.** | Each Point of Contact will have their own unique username and password for secure access. | Accounts are managed individually for each supplier, with the option to add multiple users to each account, as necessary. |

# Agenda

# Responding to Sourcing Events

**Sourcing Response Portal (#1)**

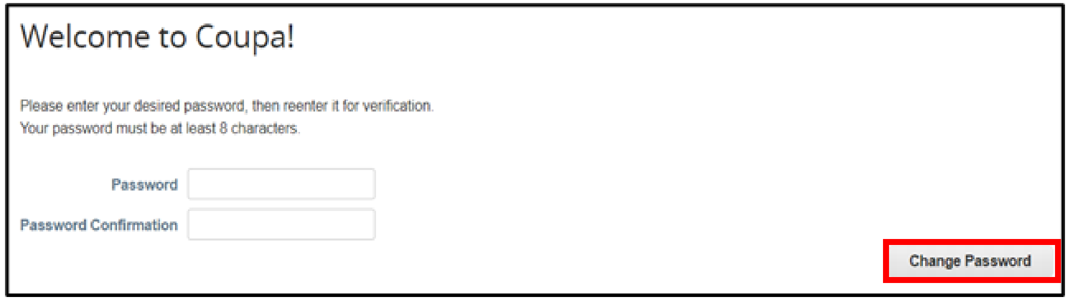


# Responding to Sourcing Events

A supplier is invited to participate in a sourcing event through an email notification sent by Worley Group.

1. Create an account in the Sourcing Response Portal by opening the notification email and click **here** to set up your log in credentials. Note your designated **username** from the email below.

   - Input your desired password and click **Change Password**.



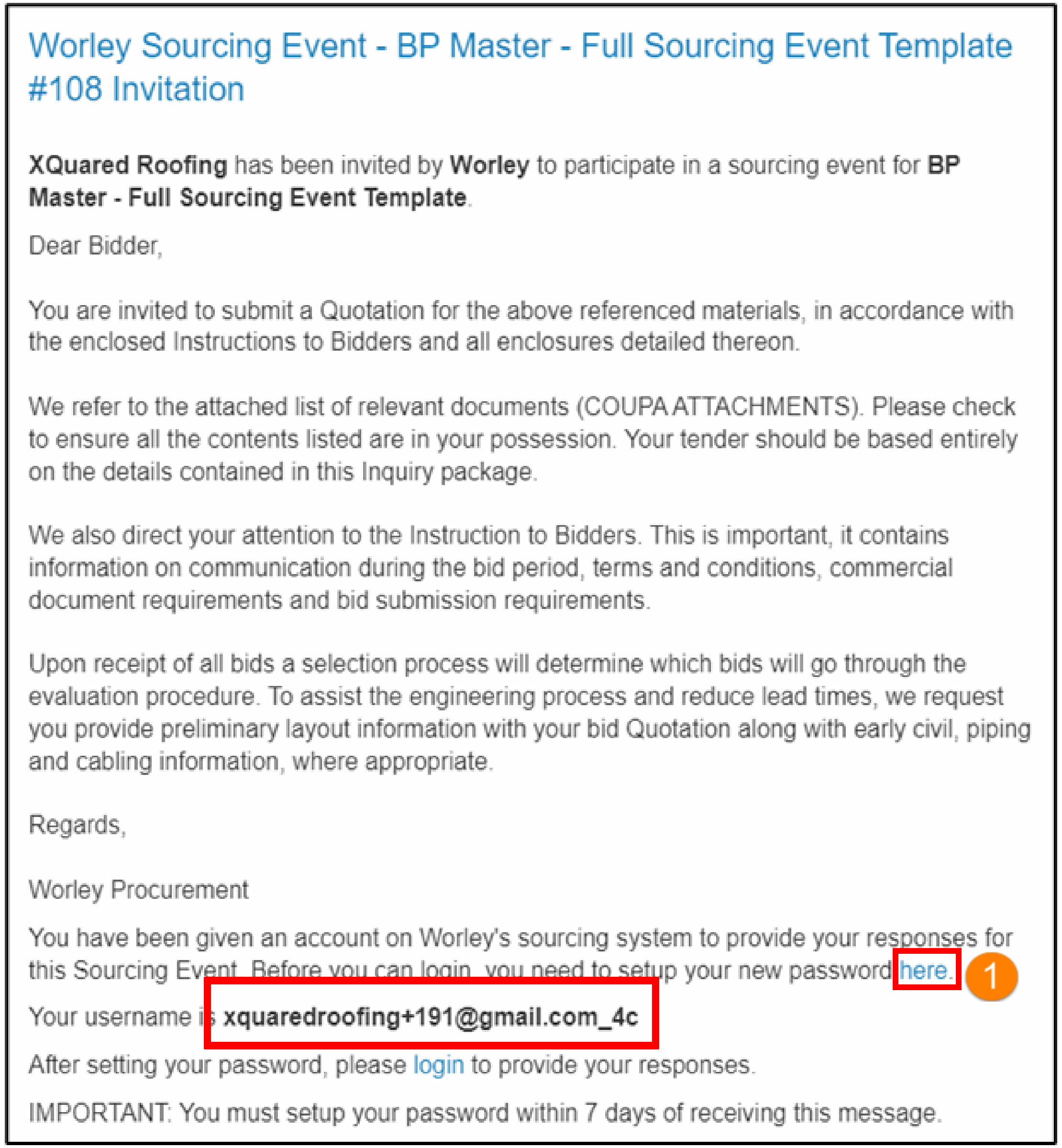
Welcome to Coupa!

Please enter your desired password, then reenter it for verification.
Your password must be at least 8 characters.

Password

Password Confirmation

Change Password



Worley Sourcing Event - BP Master - Full Sourcing Event Template #108 Invitation

**XQuared Roofing** has been invited by **Worley** to participate in a sourcing event for **BP Master - Full Sourcing Event Template**.

Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPA ATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

We also direct your attention to the Instruction to Bidders. This is important, it contains information on communication during the bid period, terms and conditions, commercial document requirements and bid submission requirements.

Upon receipt of all bids a selection process will determine which bids will go through the evaluation procedure. To assist the engineering process and reduce lead times, we request you provide preliminary layout information with your bid Quotation along with early civil, piping and cabling information, where appropriate.

Regards,

Worley Procurement

You have been given an account on Worley's sourcing system to provide your responses for this Sourcing Event. Before you can login, you need to setup your new password here. 1

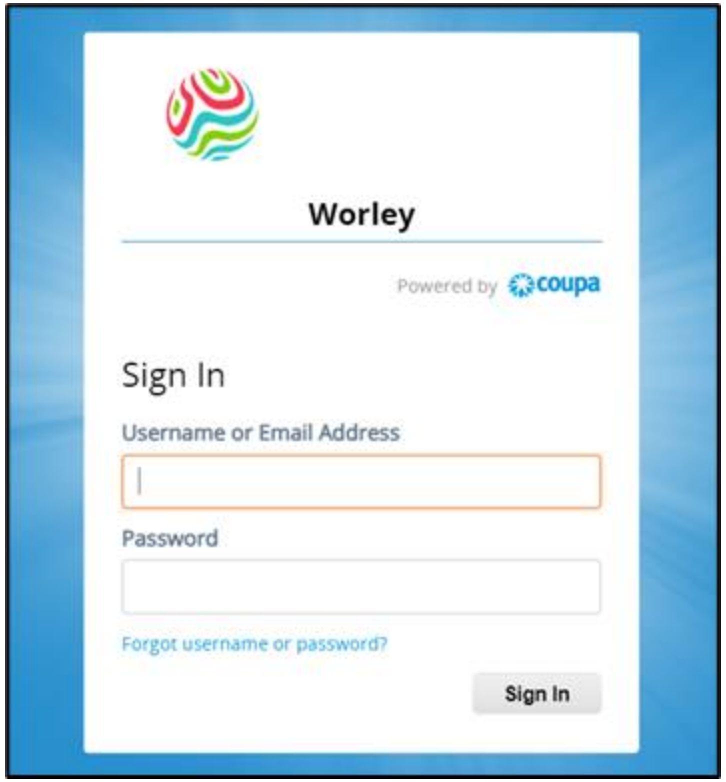
Your username is **xquaredroofing+191@gmail.com_4c**

After setting your password, please login to provide your responses.

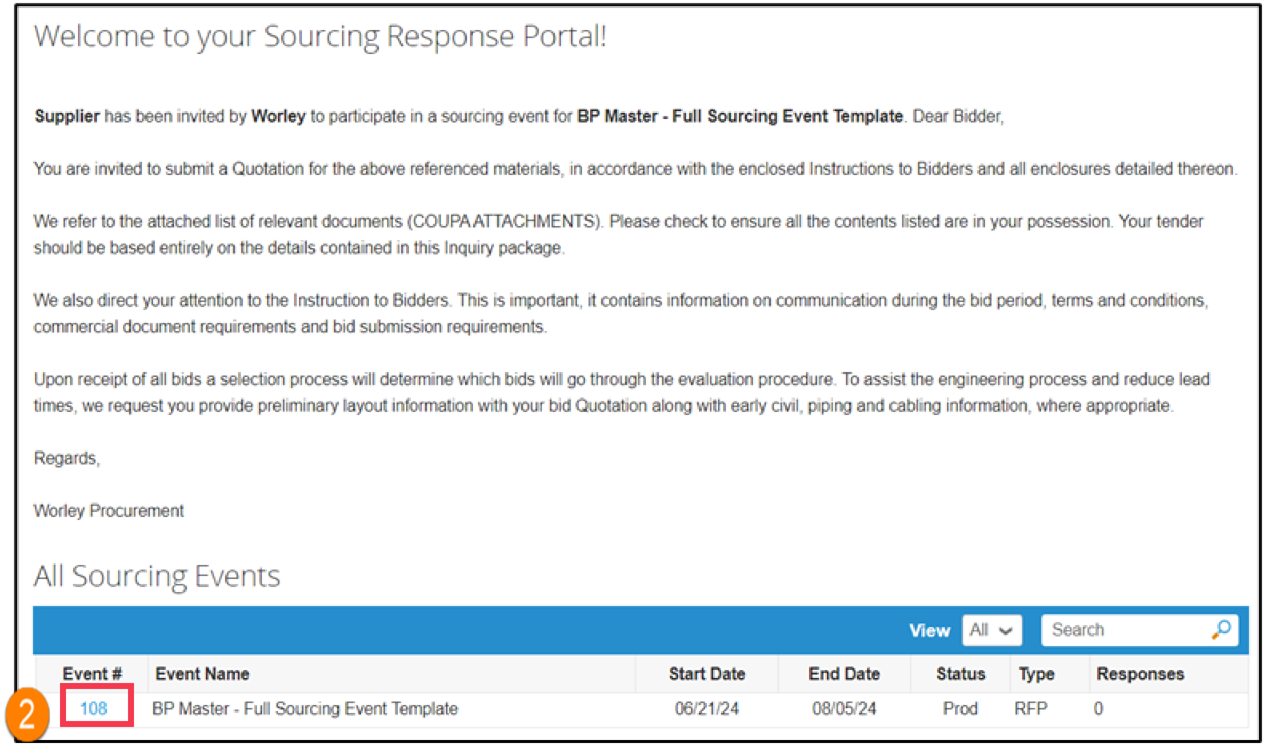
IMPORTANT: You must setup your password within 7 days of receiving this message.

# Responding to Sourcing Events

- Once password has been saved, log in via your designated username from the sourcing email notification and input your newly created password.




2. You will now be redirected to the Sourcing Response Portal. Click on the **Event #**



Welcome to your Sourcing Response Portal!

**Supplier** has been invited by **Worley** to participate in a sourcing event for **BP Master - Full Sourcing Event Template**. Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPA ATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

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Regards,

Worley Procurement

All Sourcing Events

View All Search

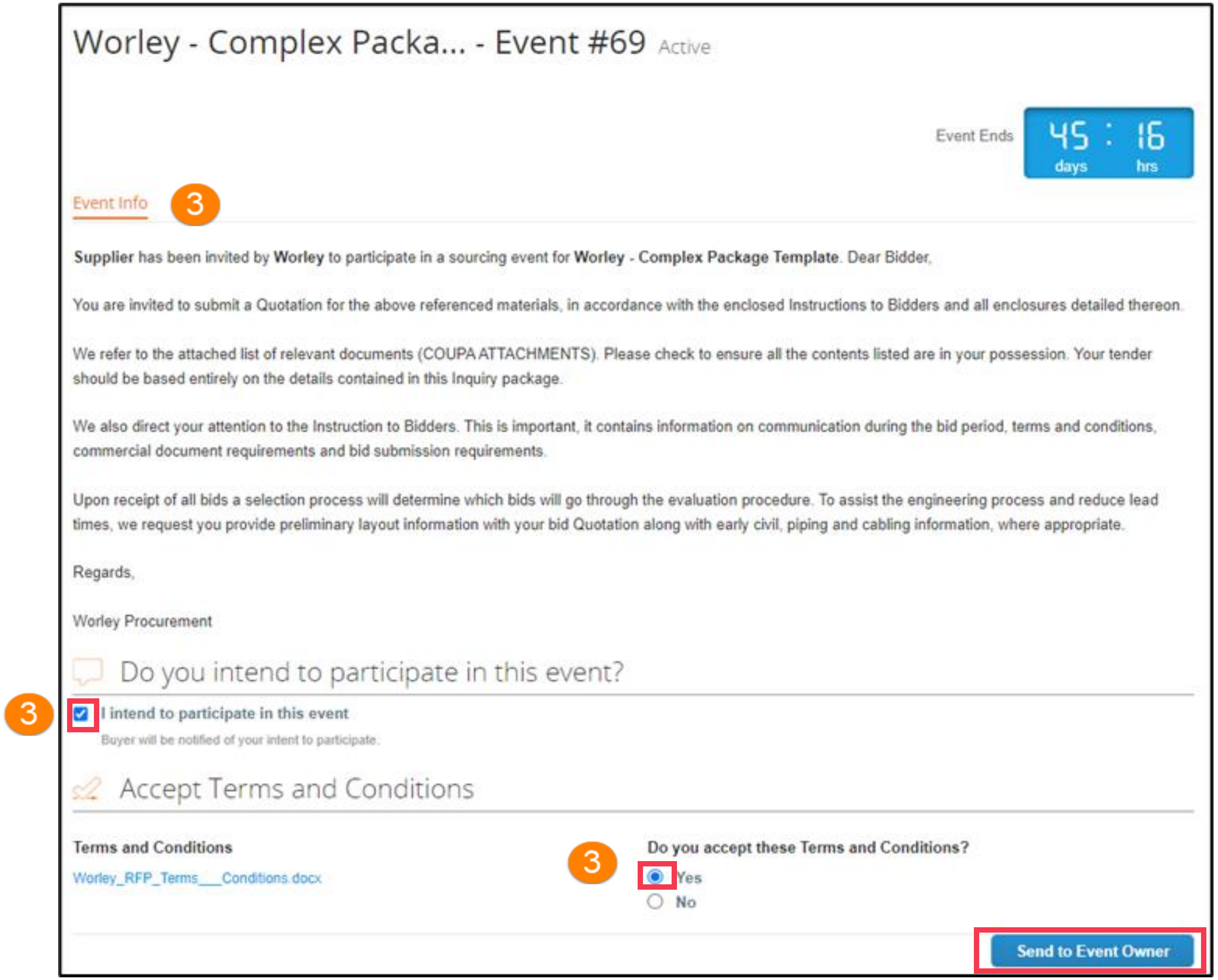
| Event # | Event Name | Start Date | End Date | Status | Type | Responses |
|---|---|---|---|---|---|---|
| 108 | BP Master - Full Sourcing Event Template | 06/21/24 | 08/05/24 | Prod | RFP | 0 |

2

# Responding to Sourcing Events

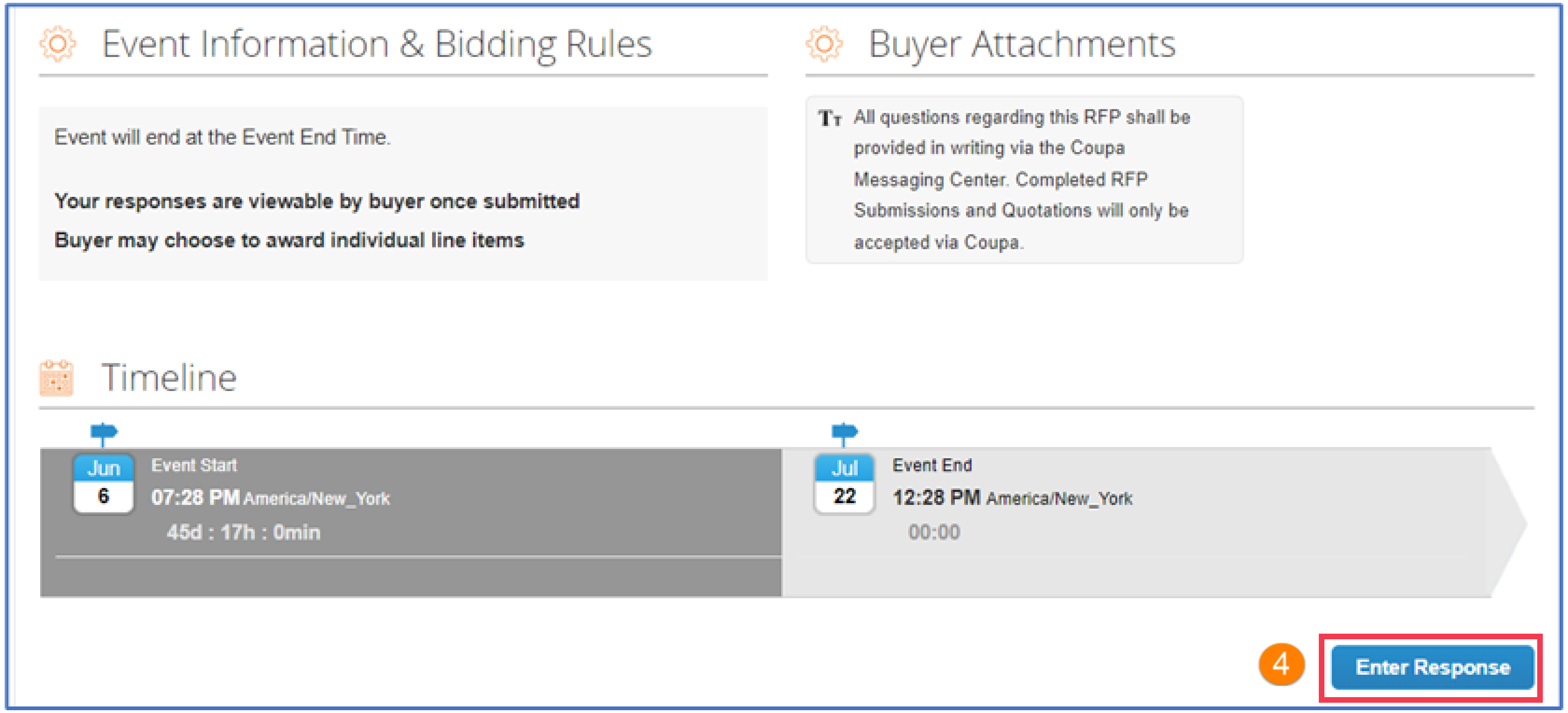
3. On the Event info tab, acknowledge the event by indicating intent to participate in the event and accept the terms and conditions.

Then, Click **Send to Event Owner**.



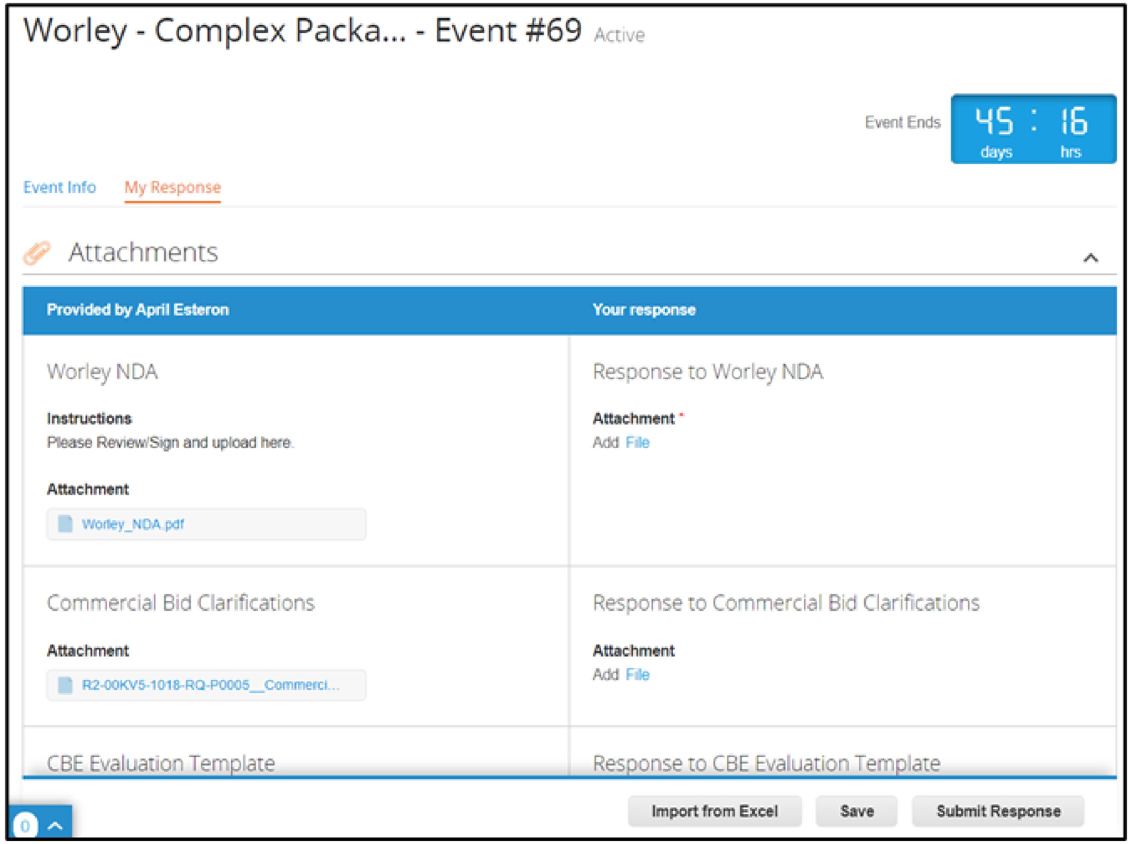
# Responding to Sourcing Events

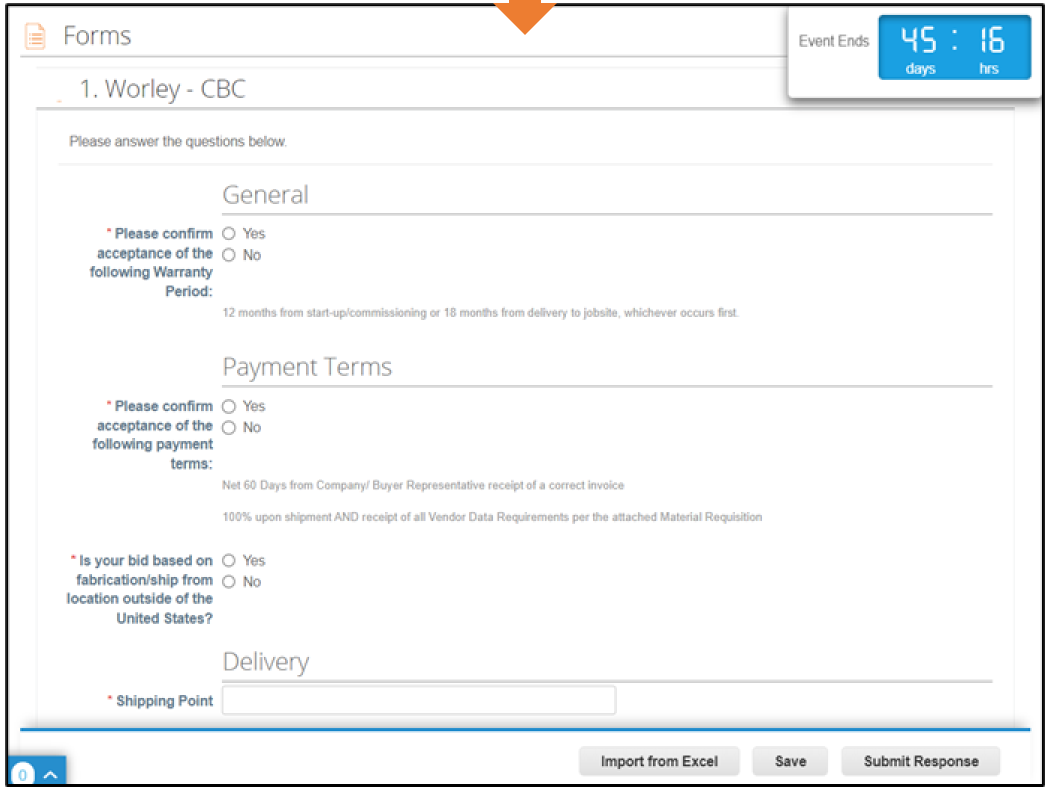
4. Scroll down to view event information & bidding rules, buyer attachments, and timeline. Click **Enter Response** to provide a response and submit a bid.



# Responding to Sourcing Events

5. On the My Response tab, enter Response:
   a. **Attachments** – Check for provided attachments. A red asterisk next to Attachment indicates a response is required.
   b. **Forms** – Complete any forms provided. Not all sourcing events include a form.

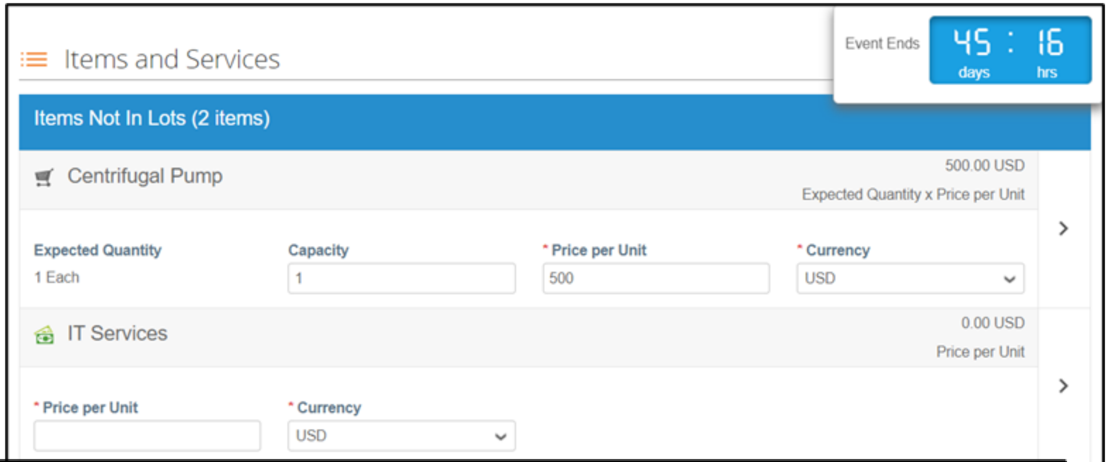


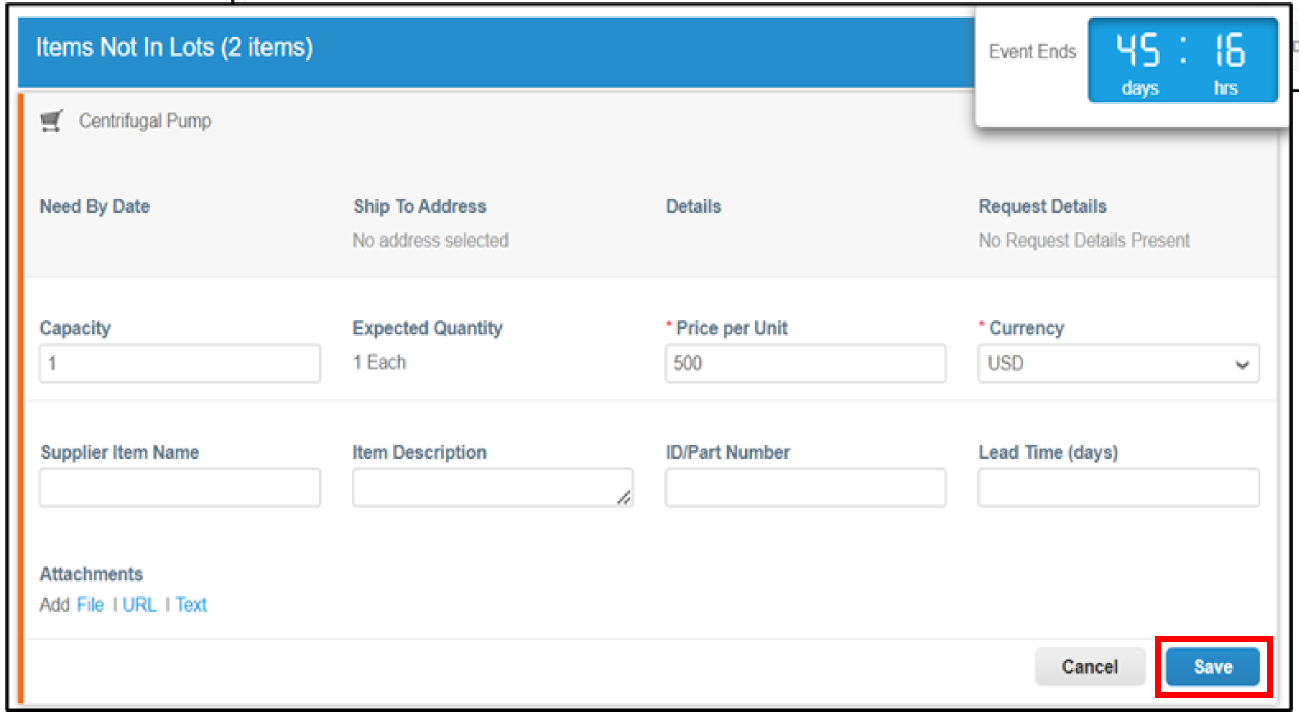



# Responding to Sourcing Events

c. **Items and Services -** at the bottom page of the My Response tab, review the list of items and/or services for bidding and enter a bid amount in the Price per Unit field. A red asterisk next to the field indicates that an input is required.

**Note**: To include additional information, expand the line item by clicking the arrow above. In the expanded view, enter additional information and click **Save**.

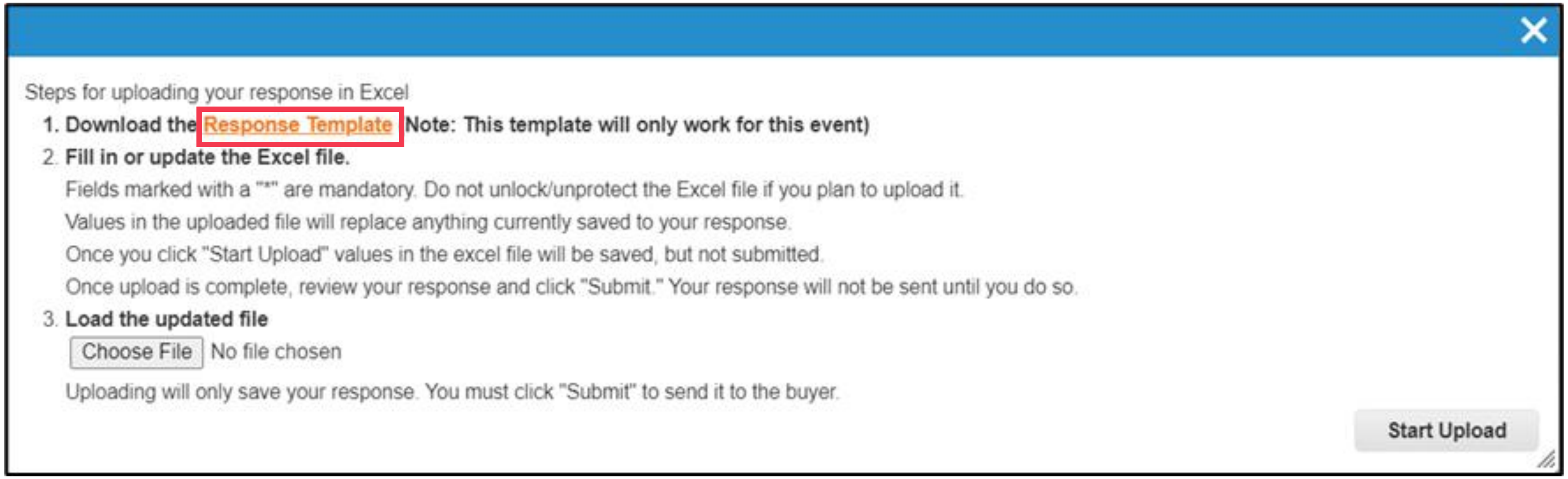


# Responding to Sourcing Events

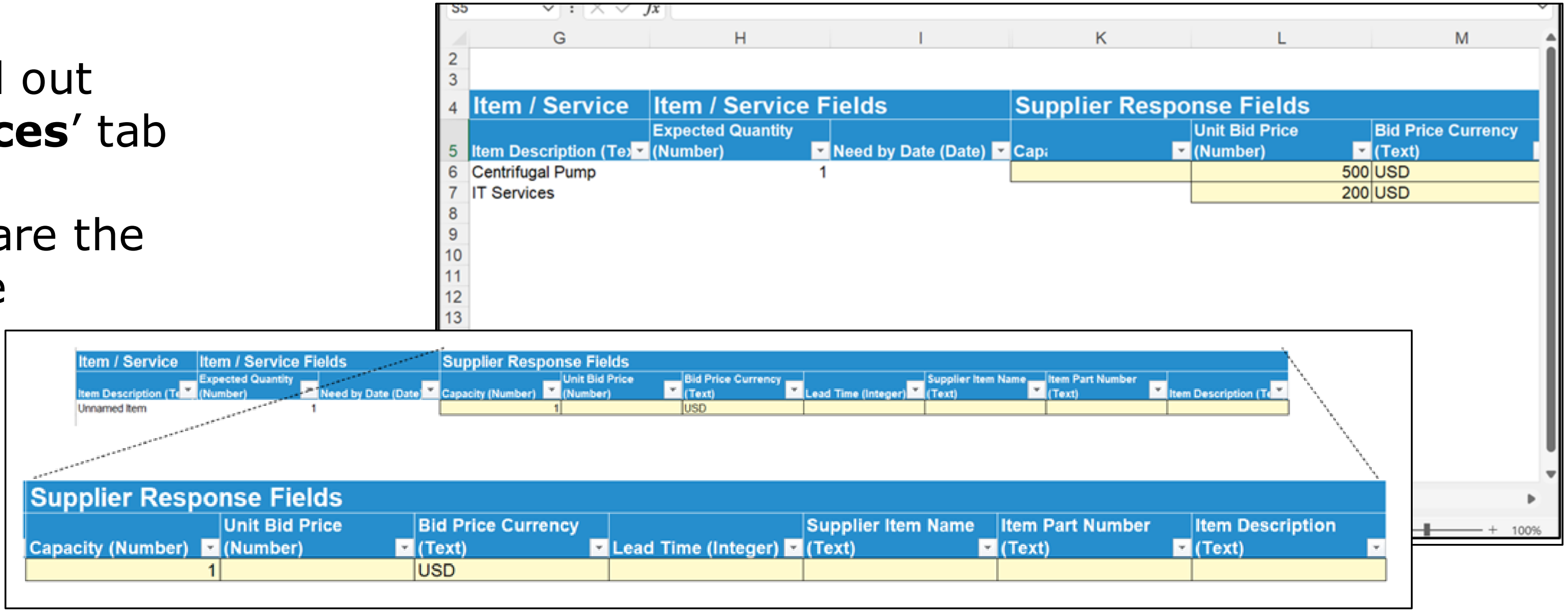
If the Event contains several line items and/or if you want to answer the forms or questionnaires via Excel, click **Import from Excel**….


…then click download the Response Template to complete the item details and/or forms in an Excel spreadsheet.

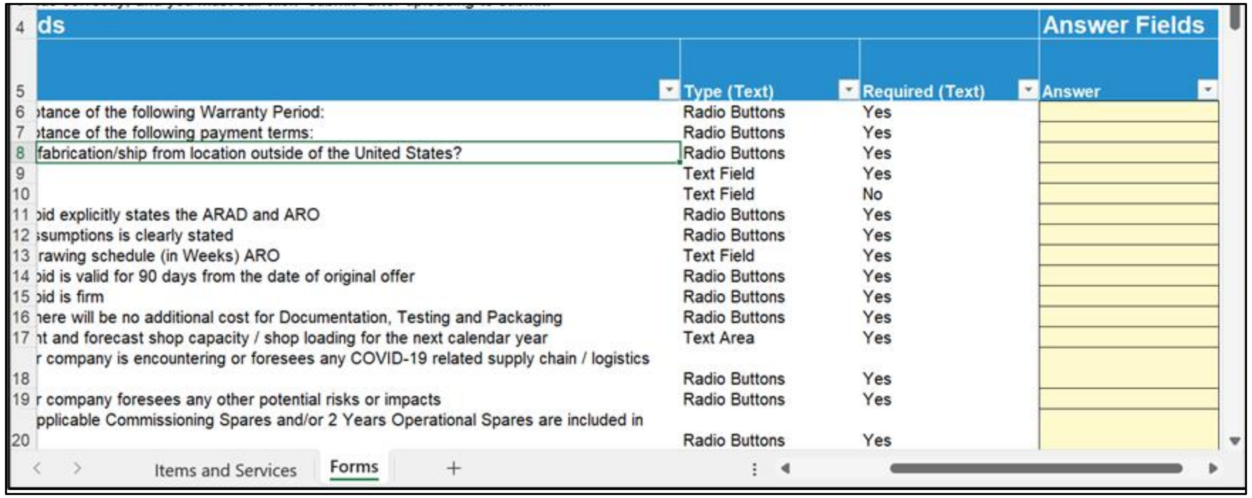


# Responding to Sourcing Events

You have the option to fill out either ‘**Items and Services**’ tab or ‘**Forms**’ tab or both. The cells in yellow are the only ones that need to be populated, but some are not required.




In the **Forms** tab, the yellow cells in Column H are required to be filled out.



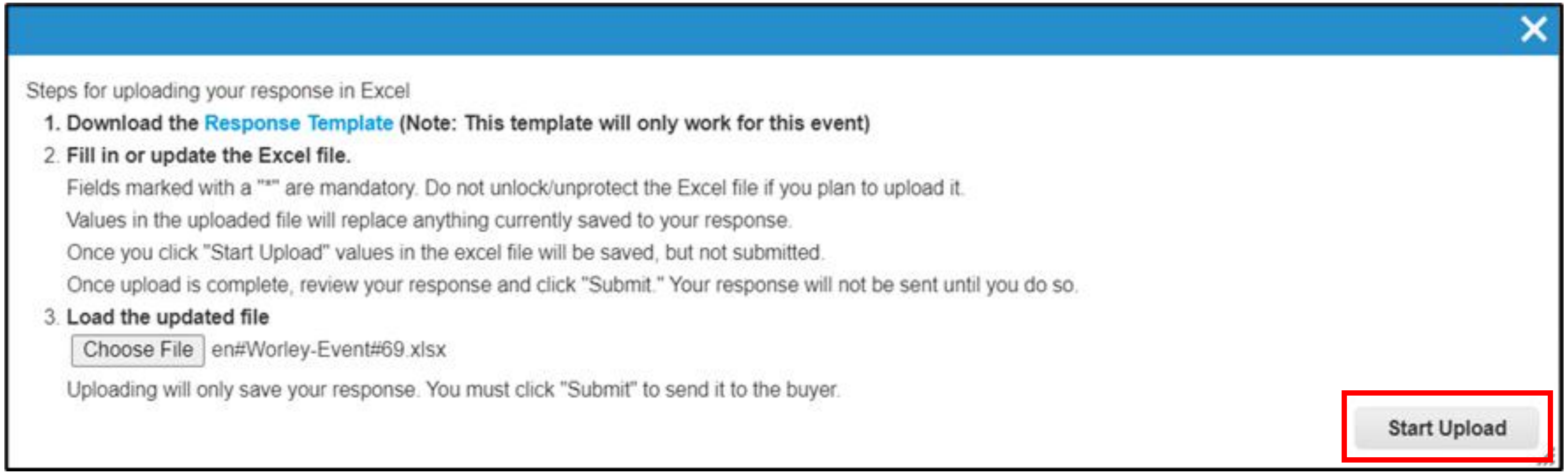
# Responding to Sourcing Events

The table below summarizes the fields in the Items and Services tab, including which fields are required to be populated.

| Field Name | Unit | Required? | Description |
|---|---|---|---|
| **Capacity** | Number | No | Indicates the number of items to bid. However, this cannot be more than the Expected Quantity (Number). |
| **Unit Bid Price** | Number | Yes | This is the Price Per Unit field where you will indicate how much you are bidding the item per quantity. |
| **Bid Price Currency** | Text | Yes | Select from the dropdown on which currency you'd like to bid on. |
| **Lead Time** | Integer | No | Lead time in Days - aims to support delivery time requirements by measuring the time it takes for a product to arrive at its end destination after an order has been placed. Populate only if applicable. |
| **Supplier Item Name** | Text | No | Name of item being bid on. |
| **Item Part Number** | Text | No | Each item may have its own item part number. Populate only if applicable. |
| **Item Description** | Text | No | Description of the item. |

# Responding to Sourcing Events

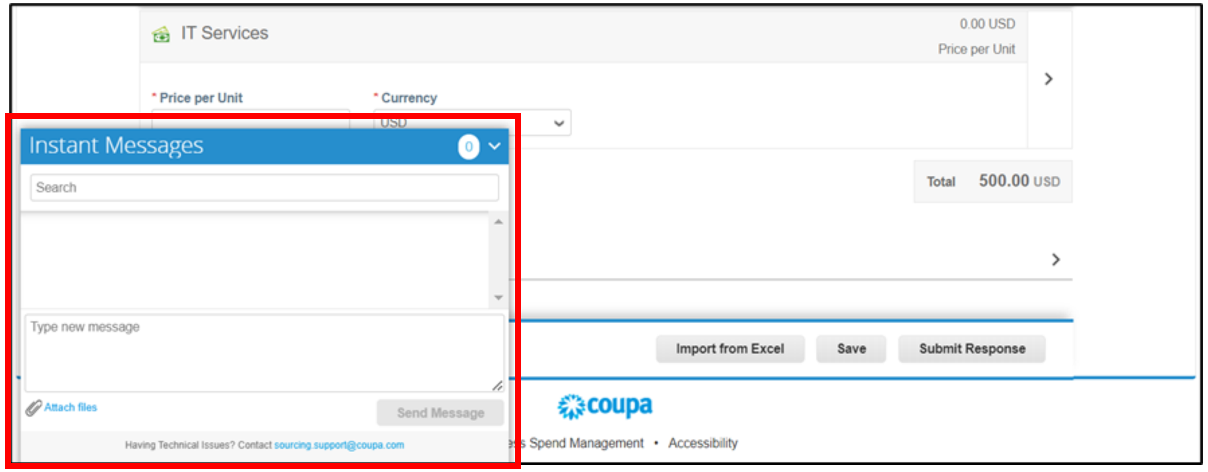
Once done, save the Excel file and click **Choose File** to load the spreadsheet. Click on **Start Upload** and a green banner showing "Excel import successful. Remember to submit your changes below." will appear.



# Responding to Sourcing Events

d. **Instant Messages Board** – ask questions or request clarification from Worley while the event is open.

**Note**: answering questions promptly through Coupa will reduce the need to call or email Worley. Additionally, the message board stores all questions and answers within the event for future reference and audit.



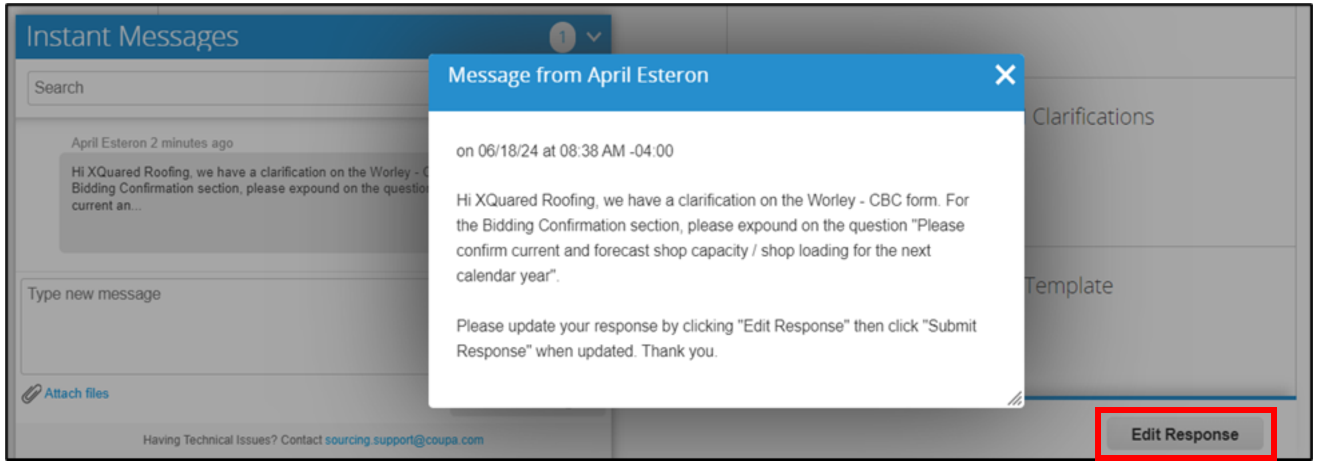

6. To submit the response, click **Submit Response**. Worley will receive a notification that the response was submitted.

# Responding to Sourcing Events

7. Worley will review and evaluate supplier responses and follow up as required. See the event terms and conditions for any further information.

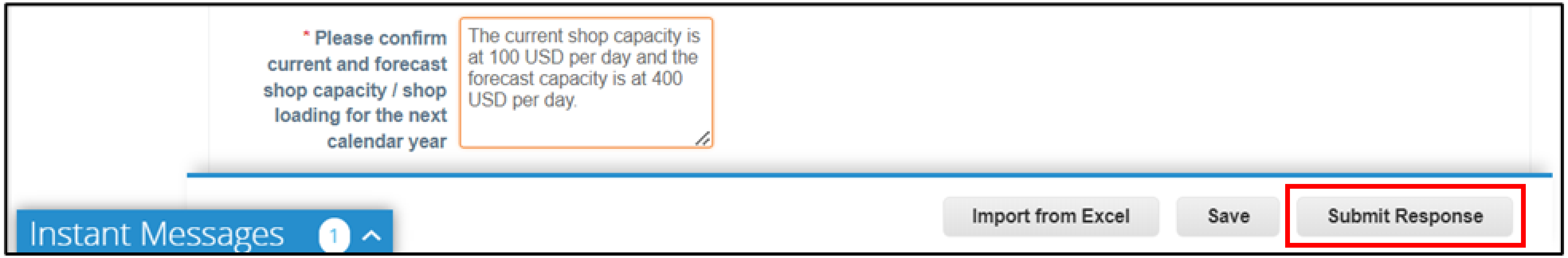
   **Note**: How to reply to the Worley CBC (Commercial Bid Clarification) Form:
   Should there be clarifications required on the form, please follow the steps below.

   1. **Submit Response** as indicated in step #5 in previous slide (11). This will enable Worley buyers to see the supplier's response and review the Worley CBC form.
   2. Worley buyer will send a message to the supplier via **Instant Messages** board. The supplier will then receive the message. If needed, attachments can also be sent both by the buyer and supplier.
   3. Click on **Edit Response** to make changes on the form.



# Responding to Sourcing Events

4. Upon editing the Worley CBC form, click **Submit Response** again for the Worley buyer to receive it. This will be repeated as needed, should there be any additional clarifications needed from the Worley buyer.



# Agenda

# Introduction to Coupa Supplier Portal

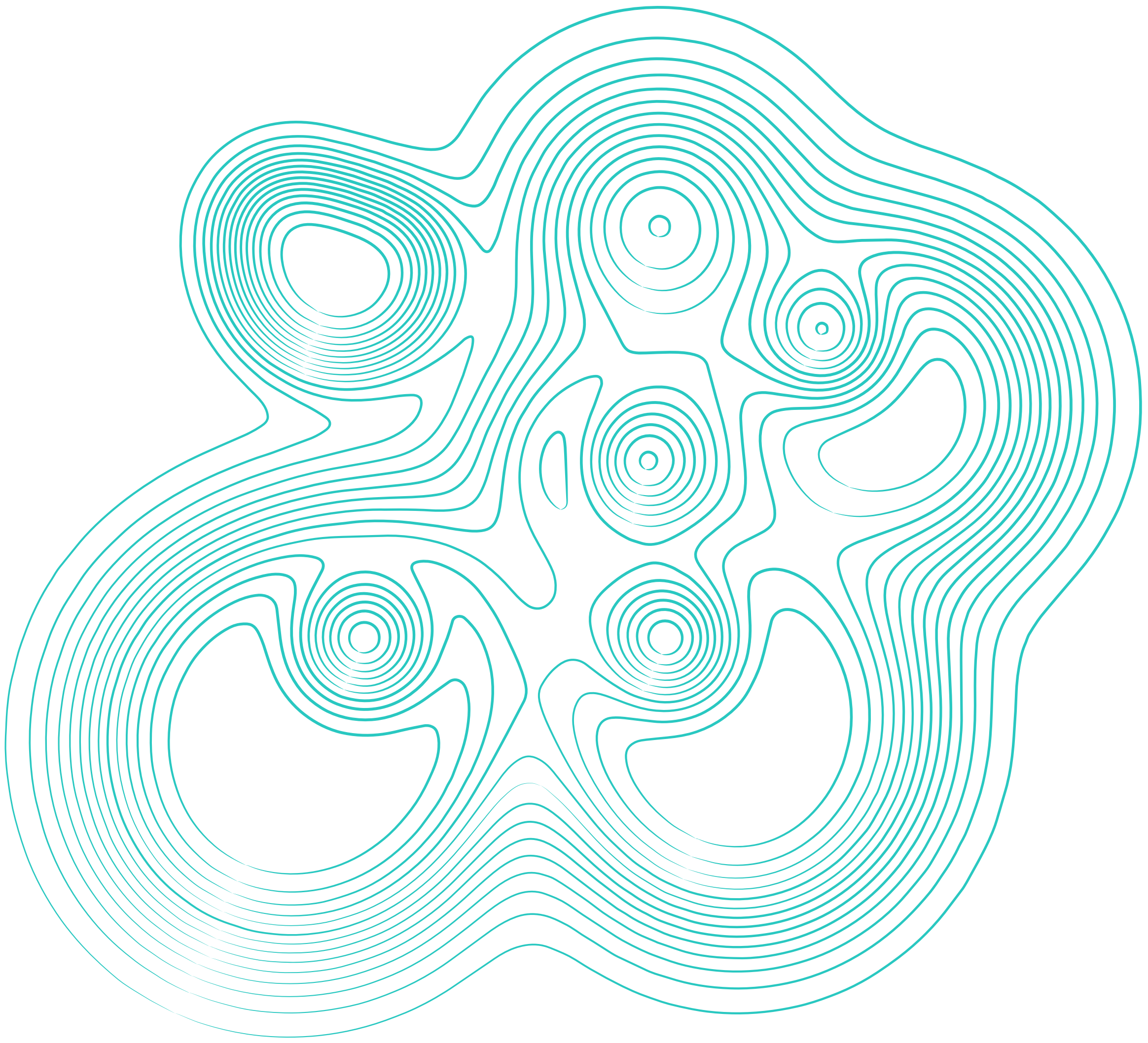
Coupa Supplier Portal (#2)

# Coupa Supplier Portal

The Coupa Supplier Portal is a free tool for suppliers to easily do business with their customers. The Coupa Supplier Portal makes managing procurement and its transactions easy. Depending on the specific Coupa configuration, content and settings can be managed on a customer-by-customer basis.

| **Attributes** *(from Supplier POV)* | **Coupa Supplier Portal** |
|---|---|
| **Purpose** | **Efficiently conduct business with Worley** (i.e., interact with buyers and manage various aspects of their relationship <u>beyond sourcing events</u>) |
| **Functionality** | Suppliers can:<br>• Manage supplier information<br>• Update profile and payment information |
| **Focus** | Interface to interact with buyers across different procurement processes & transactions including sourcing and supplier management (and purchasing + invoicing potentially in the future) |
| **User Role** | Suppliers use to collaborate with buyers |
| **Account Mgmt.** | Accounts are managed individually for each supplier, with the option to add multiple users to each account, as necessary. |

# Coupa Supplier Portal Registration



# Coupa Supplier Portal | 5 Ways to Register

| A. Worley-Created Invitation | B. SIM Invitation | C. Sourcing Invitation | D. Self-Created Invitation | E. Forwarded Invitation from a Coworker |
|---|---|---|---|---|
| Supplier receives a custom-invitation with specific instructions and a proactive message from Worley. | In the process of onboarding a new supplier to Coupa, Worley will be sending a SIM Form to the supplier that will enable them to sign up via Coupa Supplier Portal. | When invited for a Sourcing Event, suppliers who do not have a linked Coupa Supplier Portal account to Worley will receive an invite to create their profile | Suppliers set up their accounts ahead of time, add multiple users, set up login preferences, and update their profile. | Suppliers can invite others within their organization to the Coupa Supplier Portal by forwarding the invitation. |

# Coupa Supplier Portal | Ways to Register
# A. Worley-Created Invitation

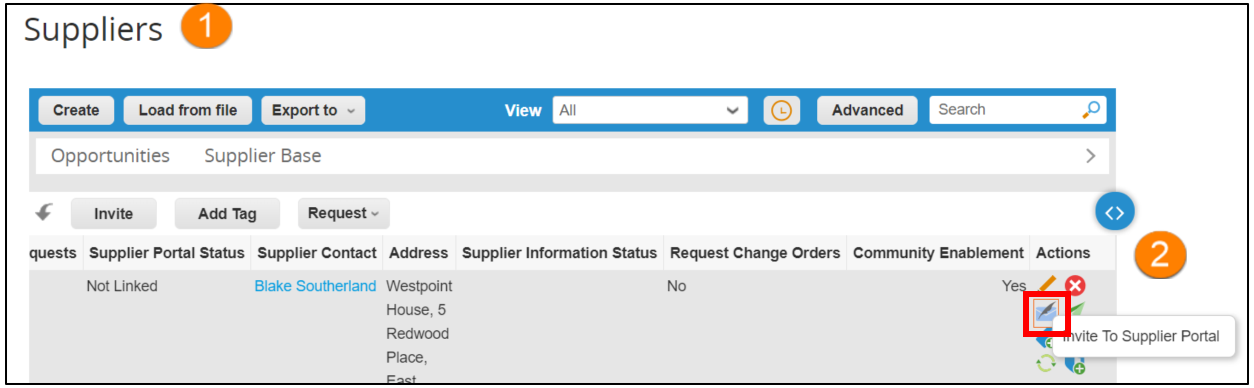
Buyers/Admin can invite suppliers to join the Coupa Supplier Portal in Coupa core via Suppliers tab:

1. Go to **Suppliers** tab and search for the Supplier you want to invite

2. There are 2 options to invite the Supplier:
   a) Go to Actions column and click the **Invite to Supplier Portal** icon
   b) Tick the tick box beside the name of the Supplier and click the **Invite** button.

3. Buyers have the option to update the invitation message to suppliers. Click the **Send Invite** button.

Confirmation Message “Invitation successfully sent will be displayed”.



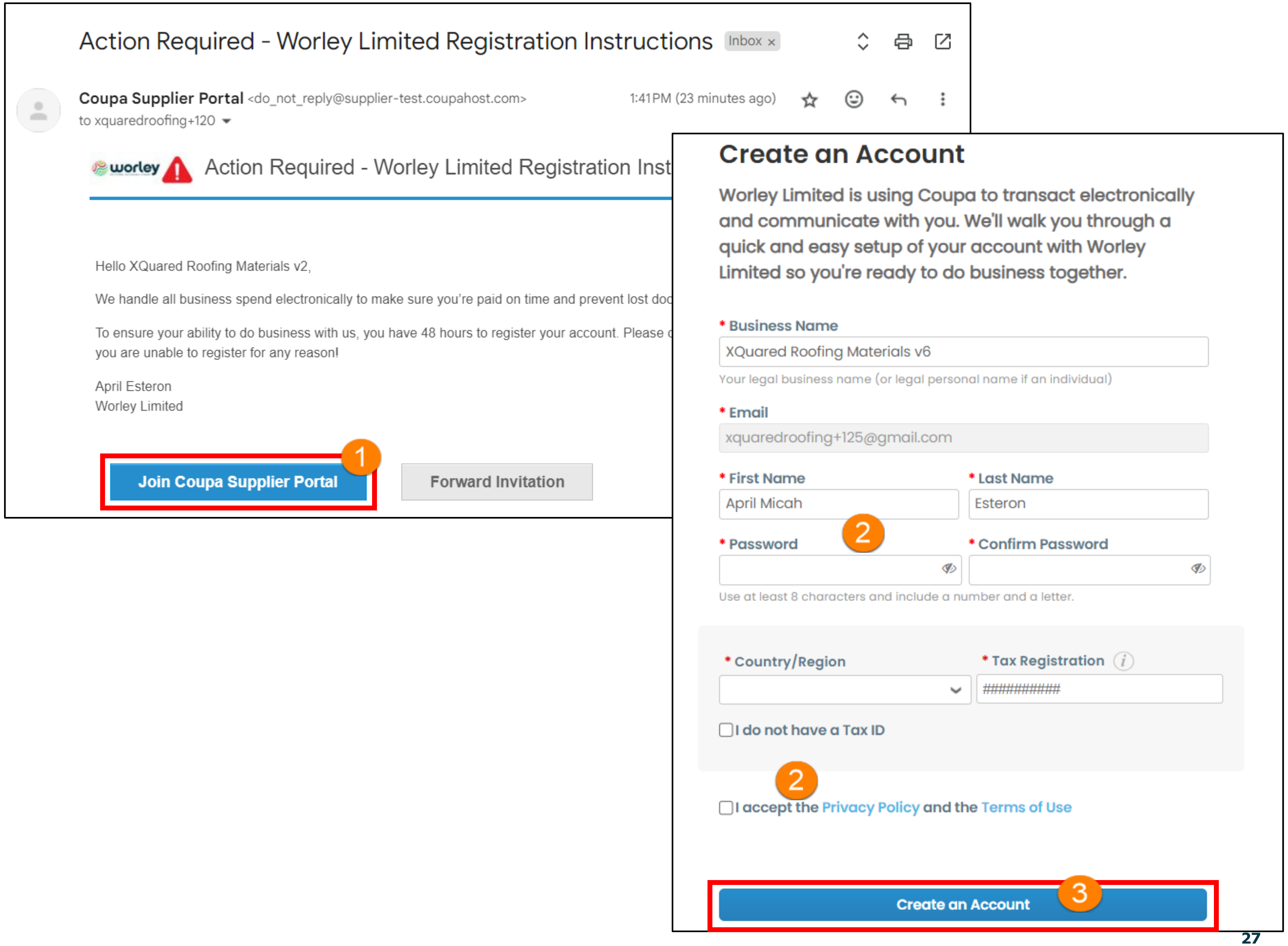

# Coupa Supplier Portal | Ways to Register
# **A. Worley-Created Invitation (cont.)**

The Supplier will receive an email notification to their provided email address with the subject: **Action Required - Worley Registration Instructions**

1. The Supplier has the option to click **Join Coupa Supplier Portal** OR to forward the invitation.

2. If the Supplier selected to join Coupa, they will be taken to the Coupa Supplier Portal page to create their account by choosing a Password, confirming the Password and accepting the **Privacy Policy** & **Terms of Use**.

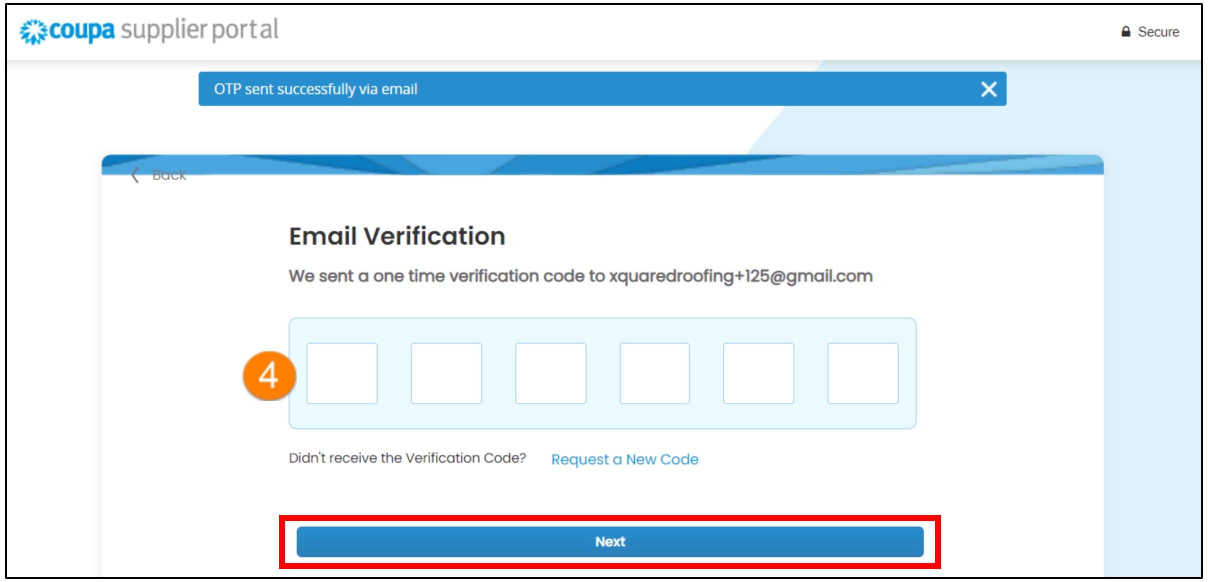
3. Click **Create an Account**

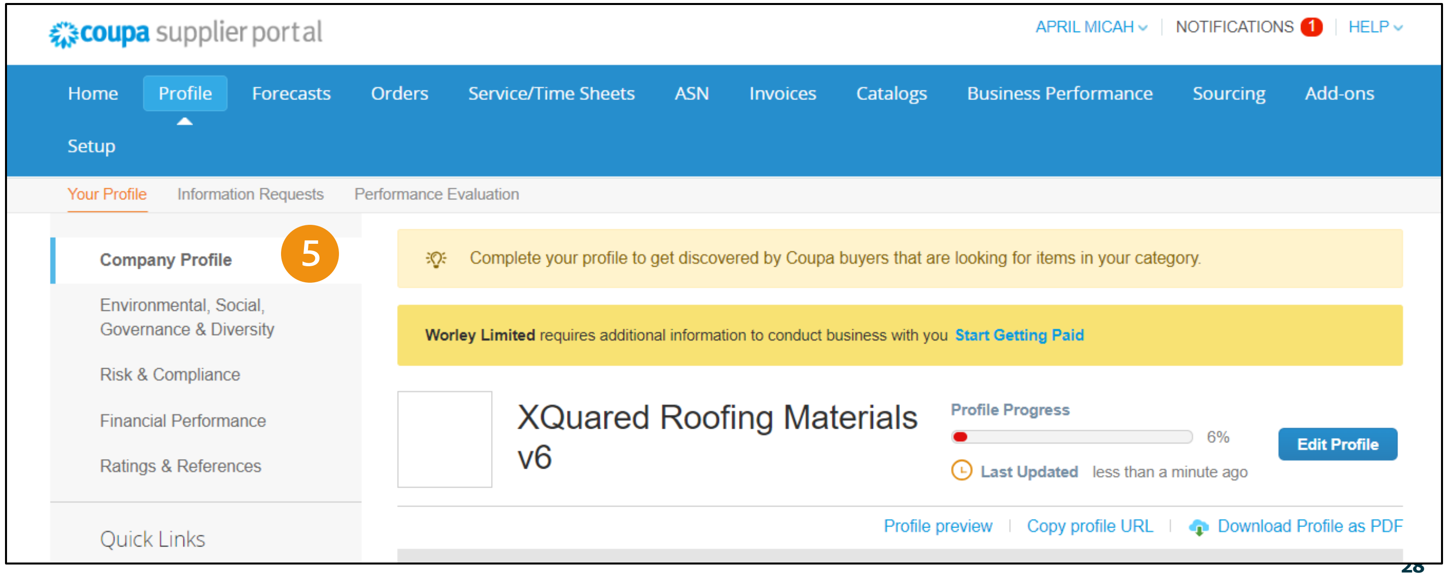


# Coupa Supplier Portal | Ways to Register
# **A. Worley-Created Invitation (cont.)**

4. An email verification will then be sent to the supplier's email address, containing the verification code. Then, click **Next**.

5. The supplier will now be able to access their account in Coupa Supplier Portal.



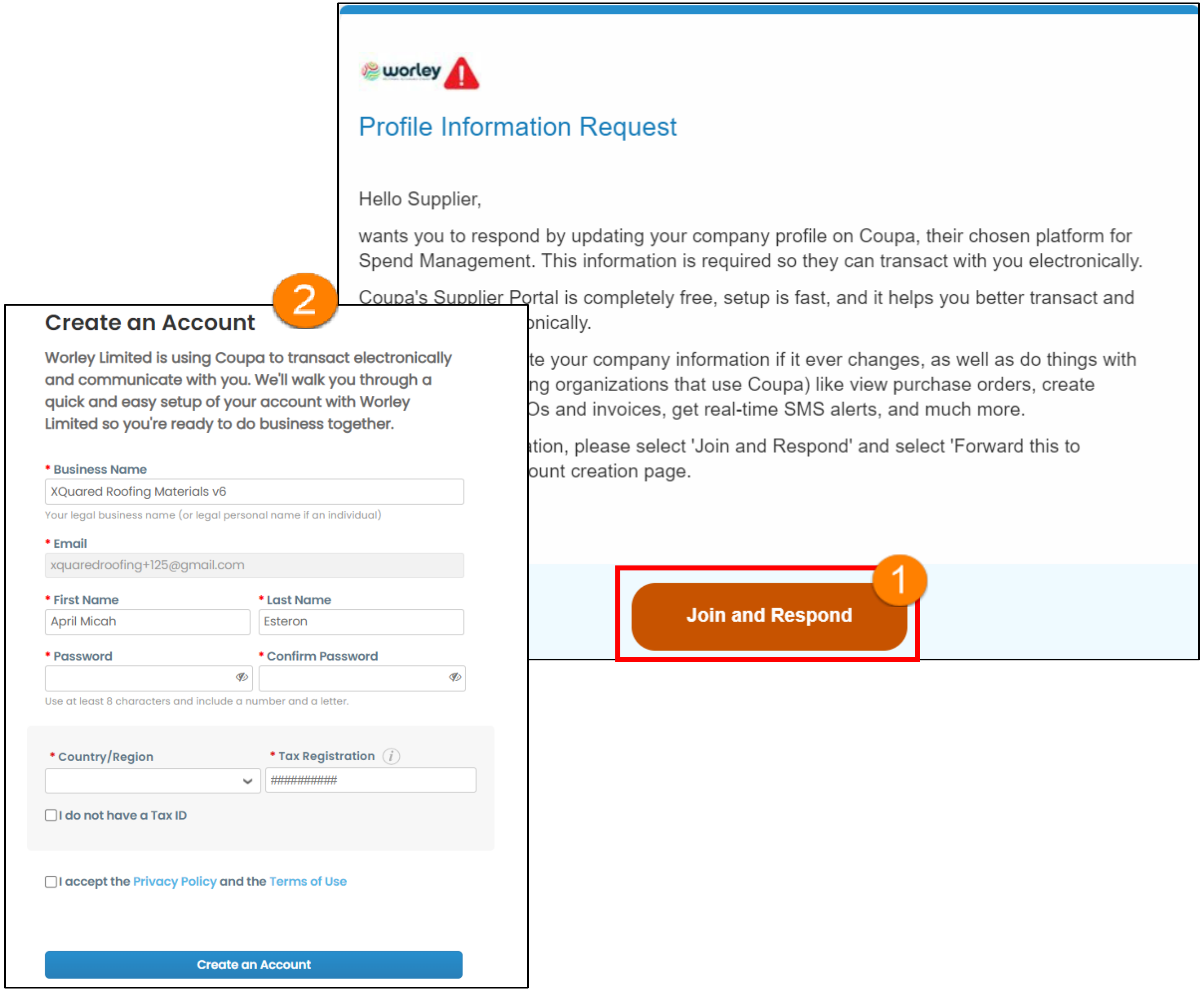



# Coupa Supplier Portal | Ways to Register
# B. SIM Invitation

If undergoing the new supplier onboarding process, supplier will receive a Profile Information Request from Worley to create a Coupa Supplier Portal account and fill out their banking details.

1. The suppliers should review the email and click the **Join & Respond** button in the email notification.

2. Suppliers will then be redirected to Coupa Supplier Portal to complete their profile.



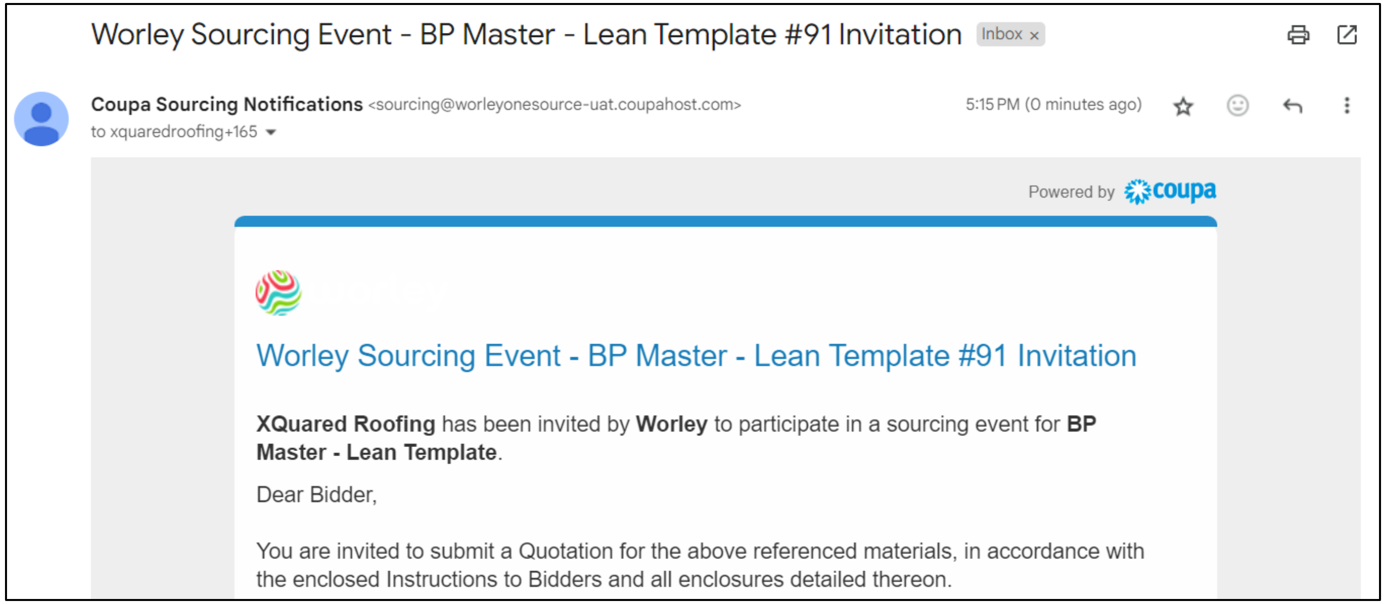
# Coupa Supplier Portal | Ways to Register
# C. Sourcing Invitation

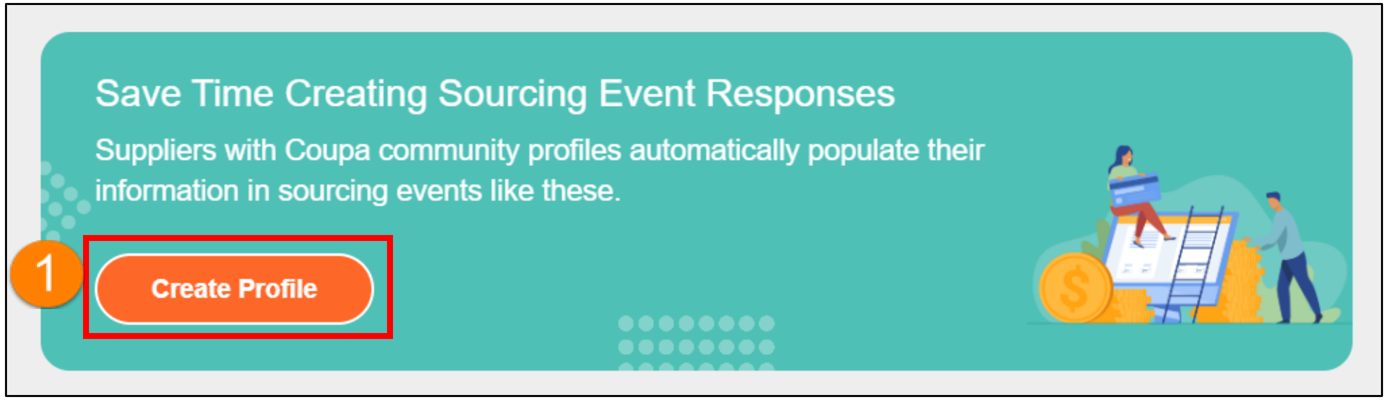
Upon receiving an invite for a Sourcing Event, the suppliers will receive a notification for the event and beneath it will be an invitation to Coupa Supplier Portal.

1. Click **Create Profile**

2. Suppliers will then be redirected to Coupa Supplier Portal to log in and complete their profile.

**Note:** Coupa Supplier Portal is **not** connected with Sourcing Response Portal and is not dependent on Worley sourcing events.

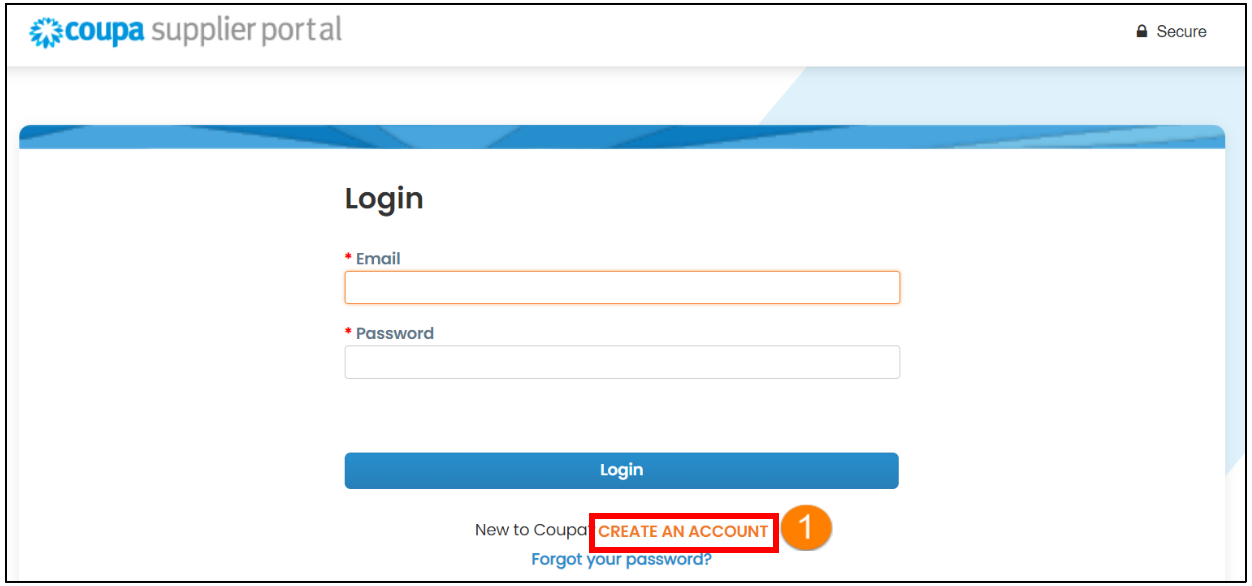


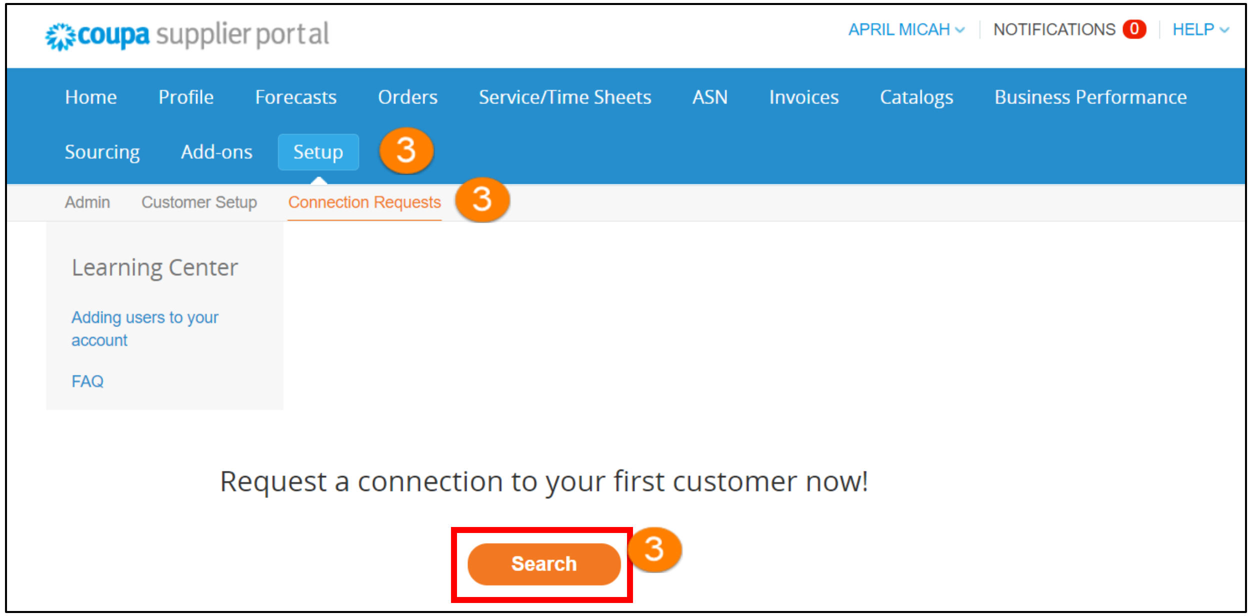



# Coupa Supplier Portal | Ways to Register
# **D. Self-Created Invitation**

Suppliers can go to **supplier.coupahost.com** to log in.

1. If the supplier is a new account, click **Create an Account**.
2. Suppliers will then be redirected with the information to fill out to complete their profile.
3. Once registered, suppliers will need to connect manually to Worley in Coupa by clicking **Setup** then **Connection Requests**. Find customers by clicking on **Search**.



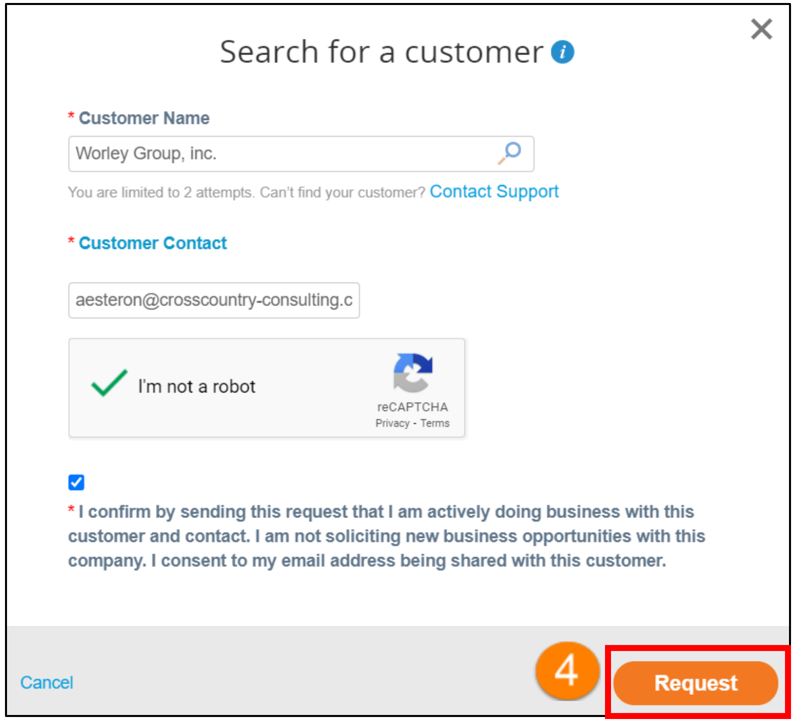



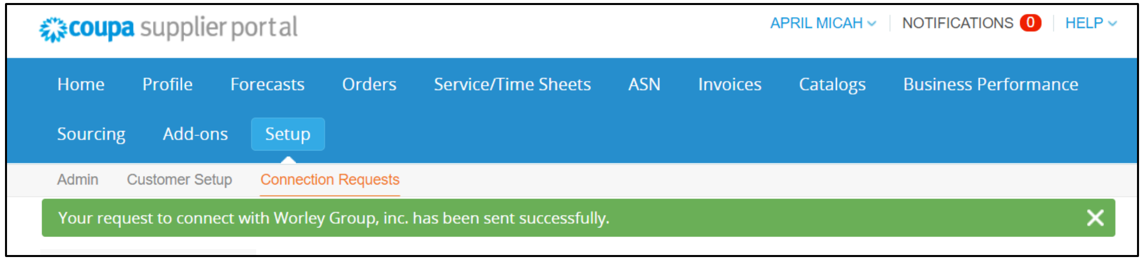
# Coupa Supplier Portal | Ways to Register
# **D. Self-Created Invitation (cont.)**

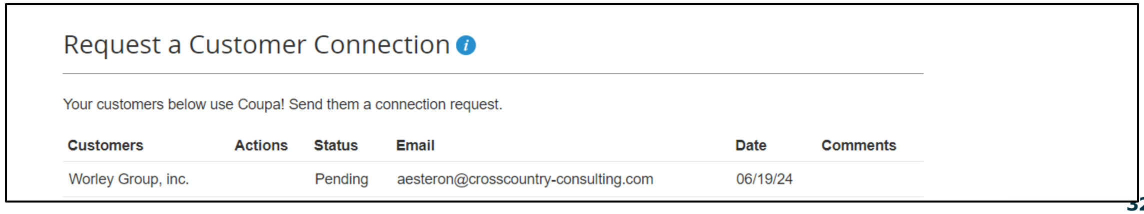
4. To search for a customer, type the **Customer Name** and click on the search icon to select it. Then, populate the **Customer Contact** by providing the email address of the buyer from Worley. Tick the confirmation button then click **Request**.

5. The supplier will now able to see that their connection request has already been sent to Worley.

A representative from Worley will connect through the Supplier Portal Directory or by sending an invitation email to any of the Coupa Supplier Portal Supplier Users on the account.



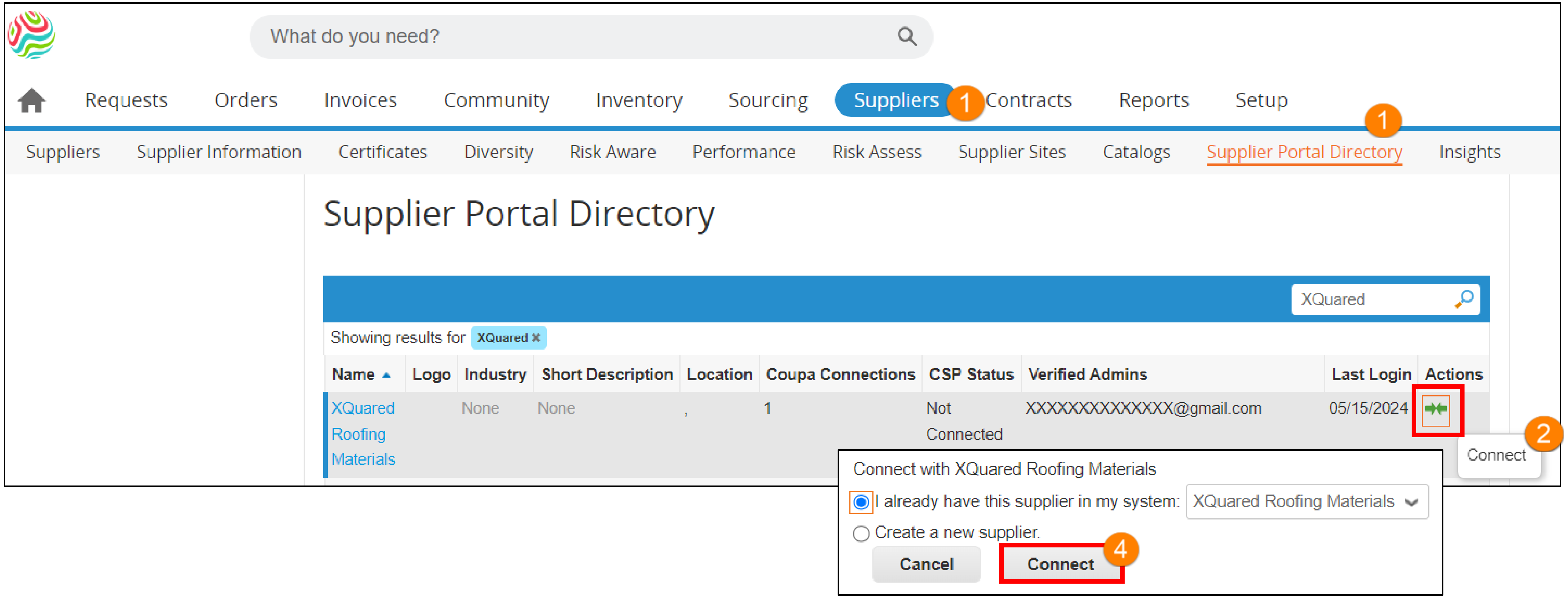



# Coupa Supplier Portal | Ways to Register
# D. Self-Created Invitation (Worley View)

**Accept connection requests**

1. Go to **Suppliers** > **Supplier Portal Directory**.
2. Find the supplier you want to transact with on the Coupa Supplier Portal and click **Connect** in the Actions column.
3. Worley has the option to select at one supplier record in Coupa to connect the supplier's Coupa Supplier Portal account with or to create a new supplier.
4. Click **Connect**.

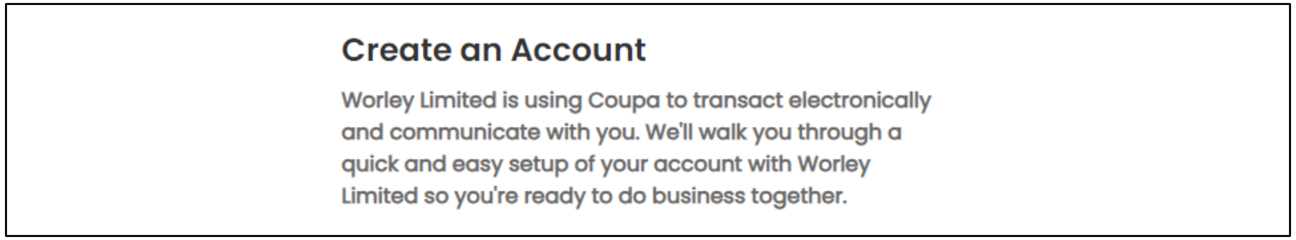


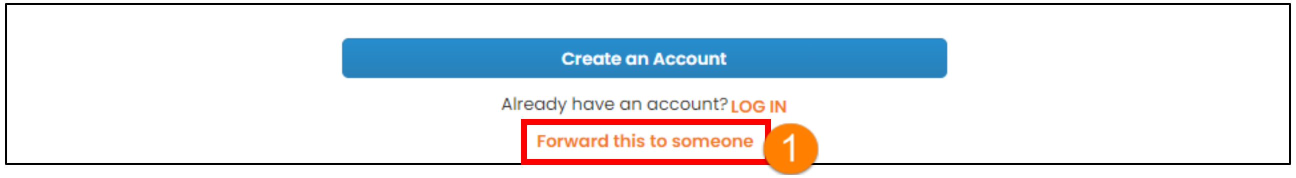
# Coupa Supplier Portal | Ways to Register
# E. Forwarded Invitation From a Coworker

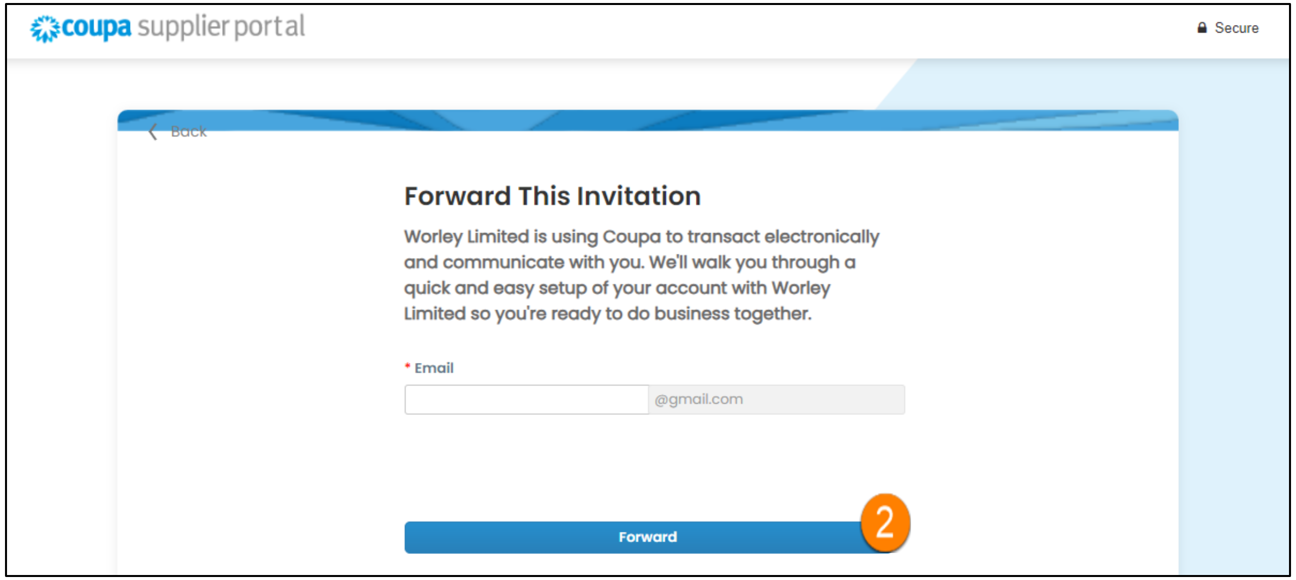
1. Upon creating an account, suppliers can also invite their coworkers in Coupa Supplier Portal by clicking **Forward this to someone**.

2. The supplier will need to input the email address of their coworker then click **Forward**.

**Note:** Suppliers can forward the invitation to email addresses with the same domain.



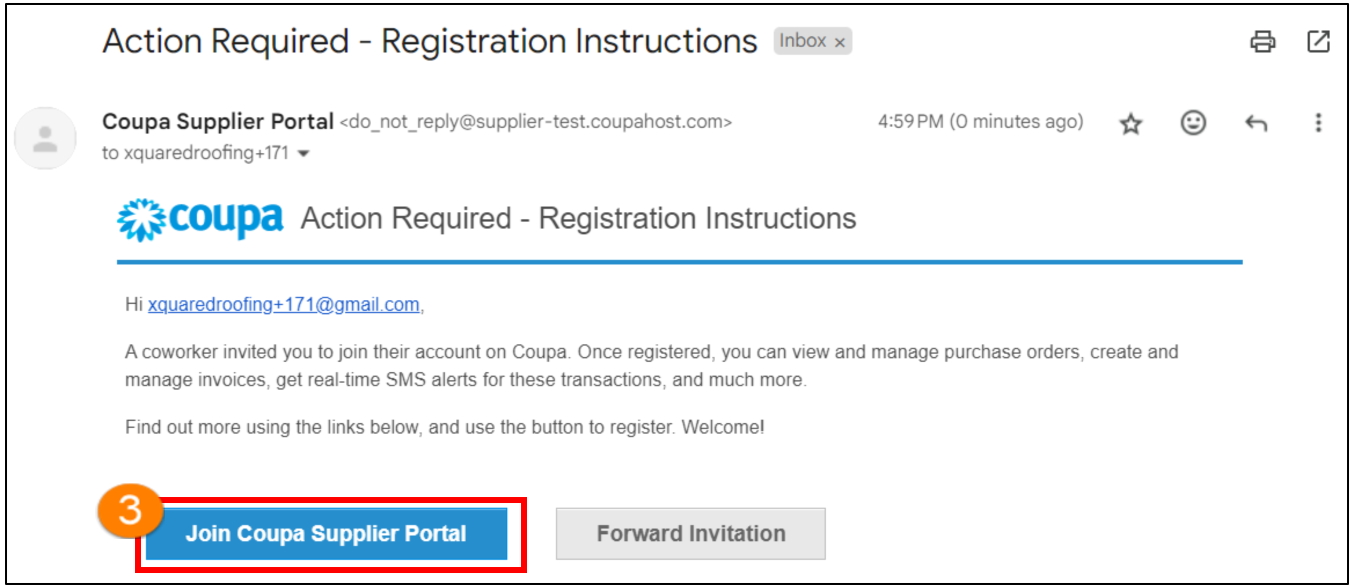



# Coupa Supplier Portal | Ways to Register
# E. Forwarded Invitation From a Coworker (cont.)

3. The coworker will then receive the email notification that a coworker has invited them to join their account in Coupa. They will then click **Join Coupa Supplier Portal** and be redirected to Coupa Supplier Portal to complete their profile.

If the user is already linked to the Coupa Supplier Portal, he will be asked to log in instead. Otherwise, if the supplier tries to create an account from an expired invitation, the user is directed to the Register – Login page where a red message bar displays: ***"Your invitation has expired or already been activated."***

**Note:** Invitations to the Coupa Supplier Portal expire in 30 days.



# Manage Profile

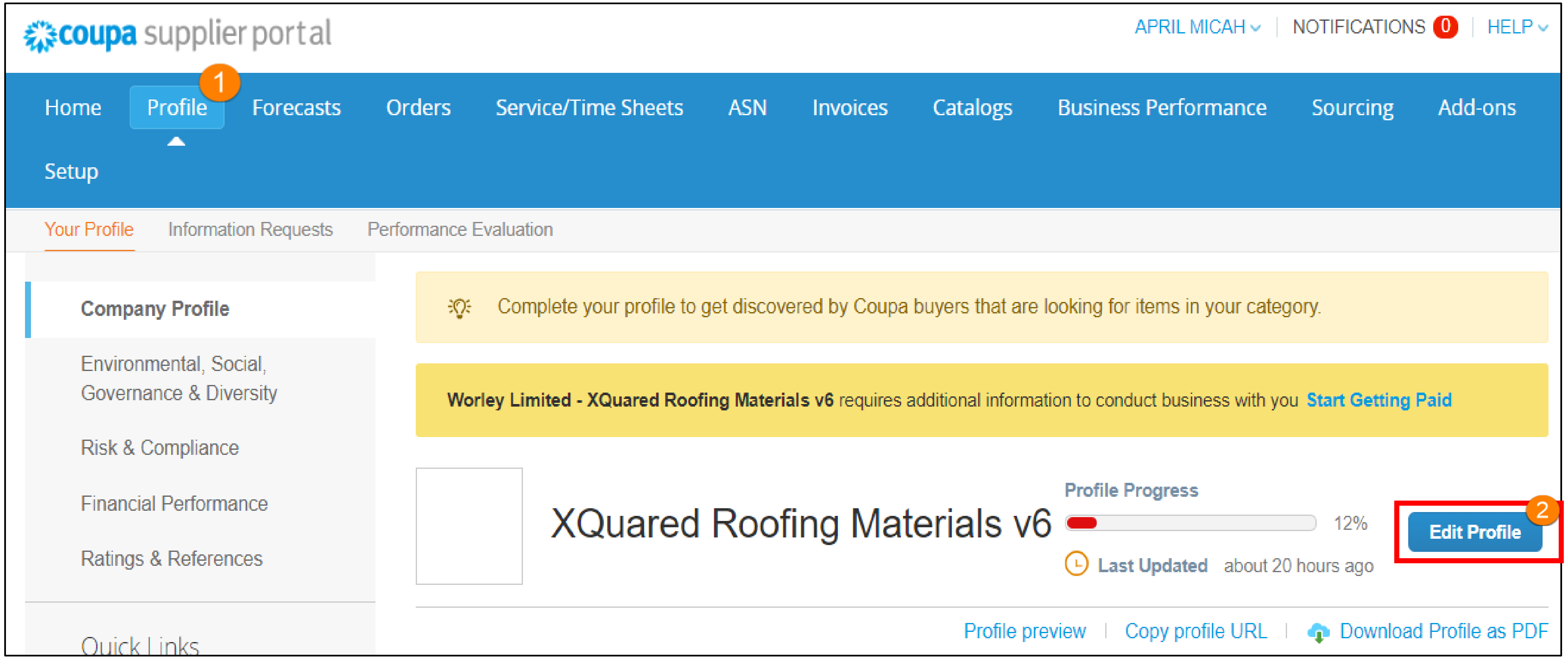
# Coupa Supplier Portal | Manage Profile

## A. Public Profile

In Coupa Supplier Portal you have a public profile that is visible in the Coupa Supplier Portal Directory and allows potential Coupa customers to find your profile.

To get started filling out your profile information:

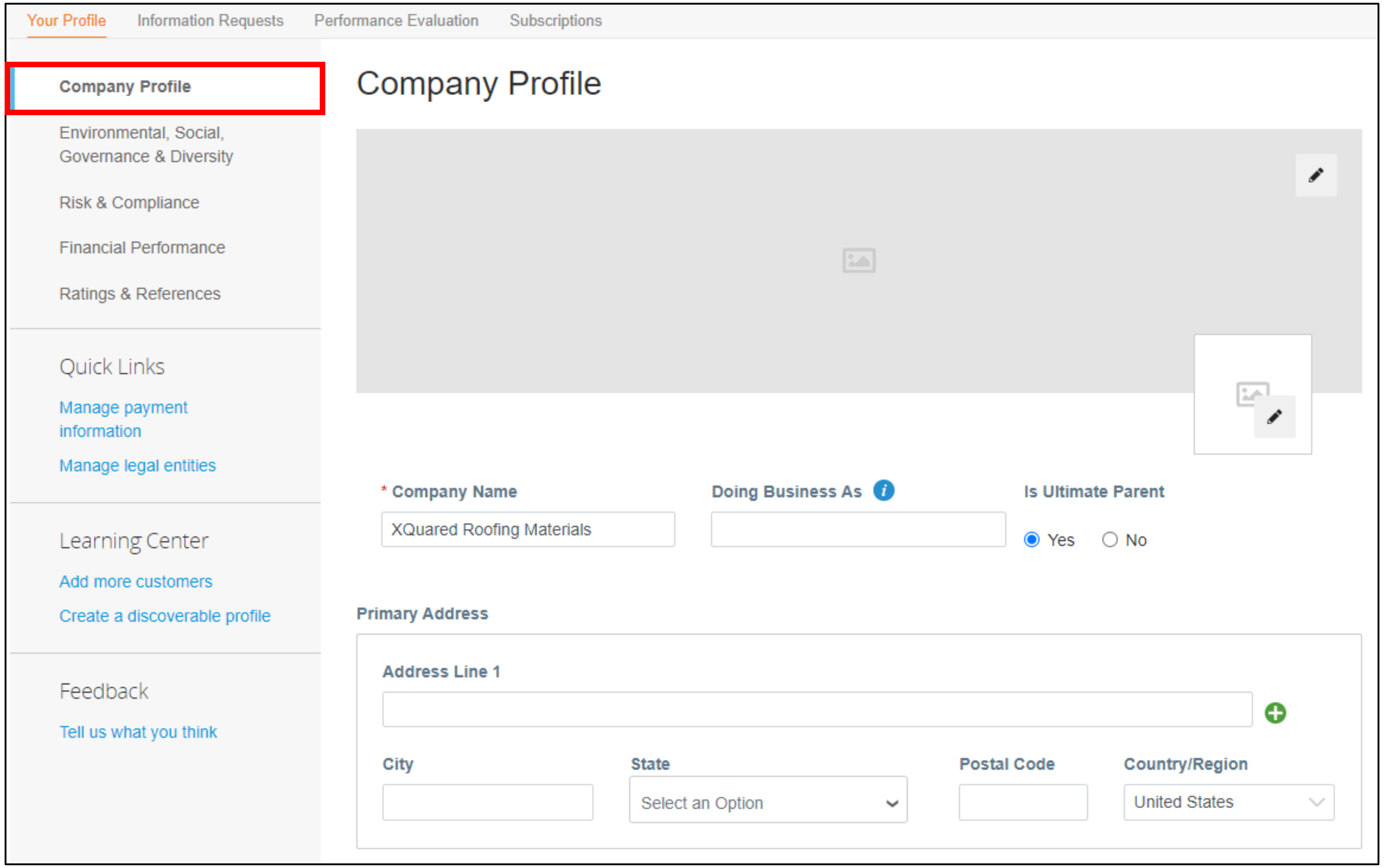
1. Select **Profile** in the top menu.
2. Click **Edit Profile** to take you to the section you select so you can complete your information.



# Coupa Supplier Portal | Manage Profile

## 1. Company Profile

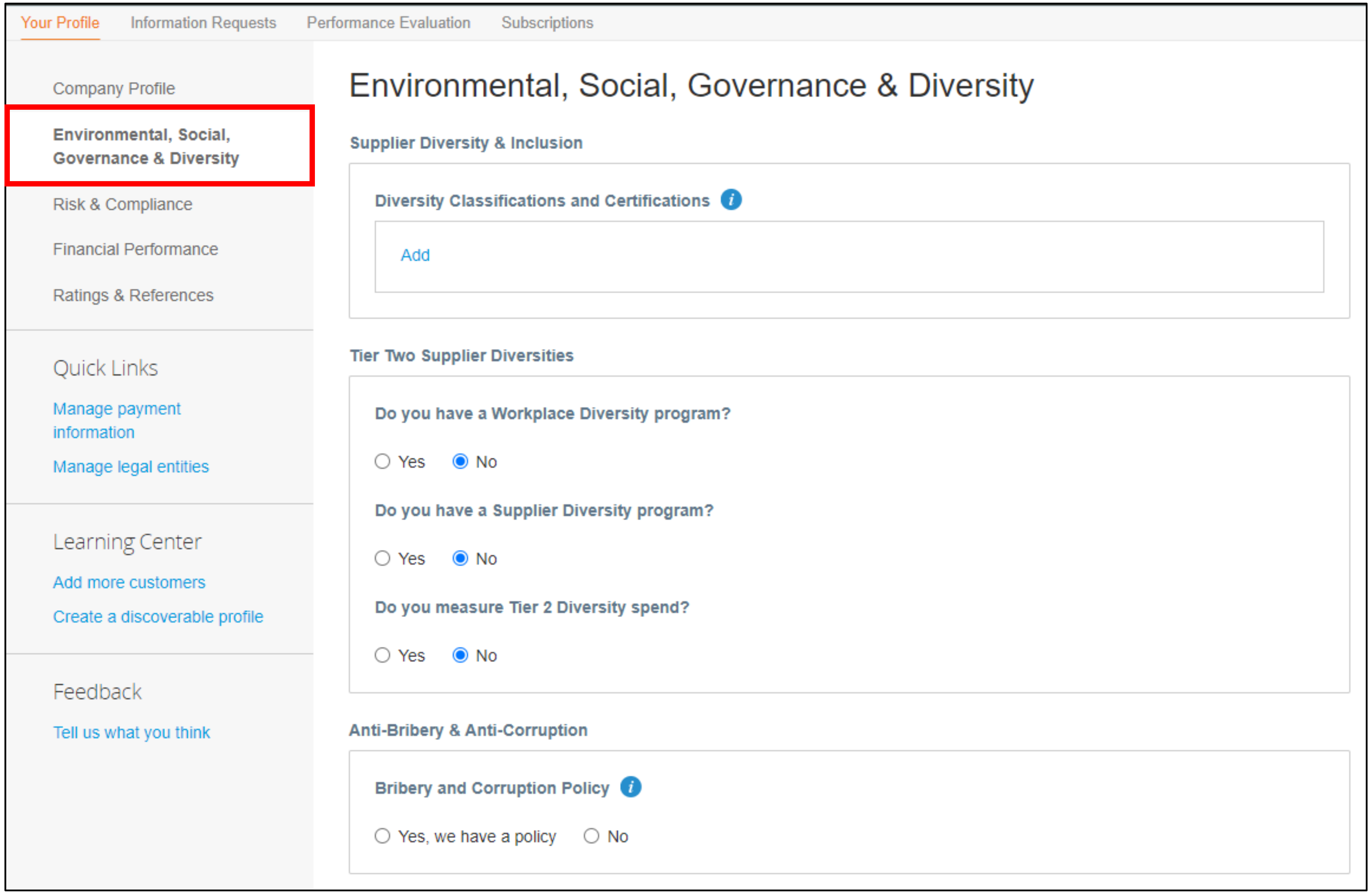
The Company Profile section gives customers background information about your business, such as what your business does, how customers can contact your business, and how they can interact with your business on social media.



# Coupa Supplier Portal | Manage Profile

## 2. Environmental, Social, Governance & Diversity

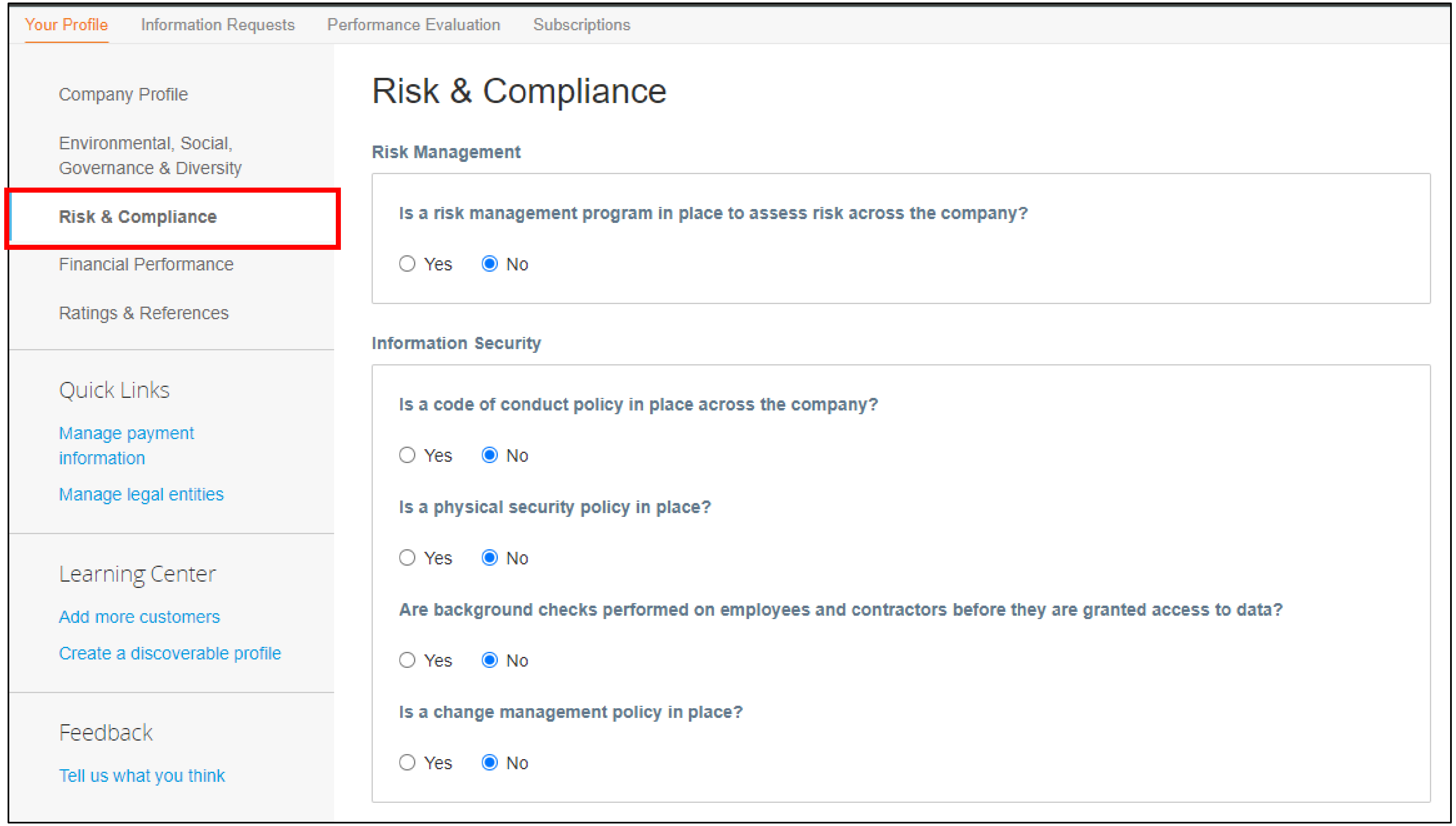
The Environmental, Social, Governance & Diversity section gives your customers information about how your business engages with social goals.



# Coupa Supplier Portal | Manage Profile

## 3. Risk & Compliance

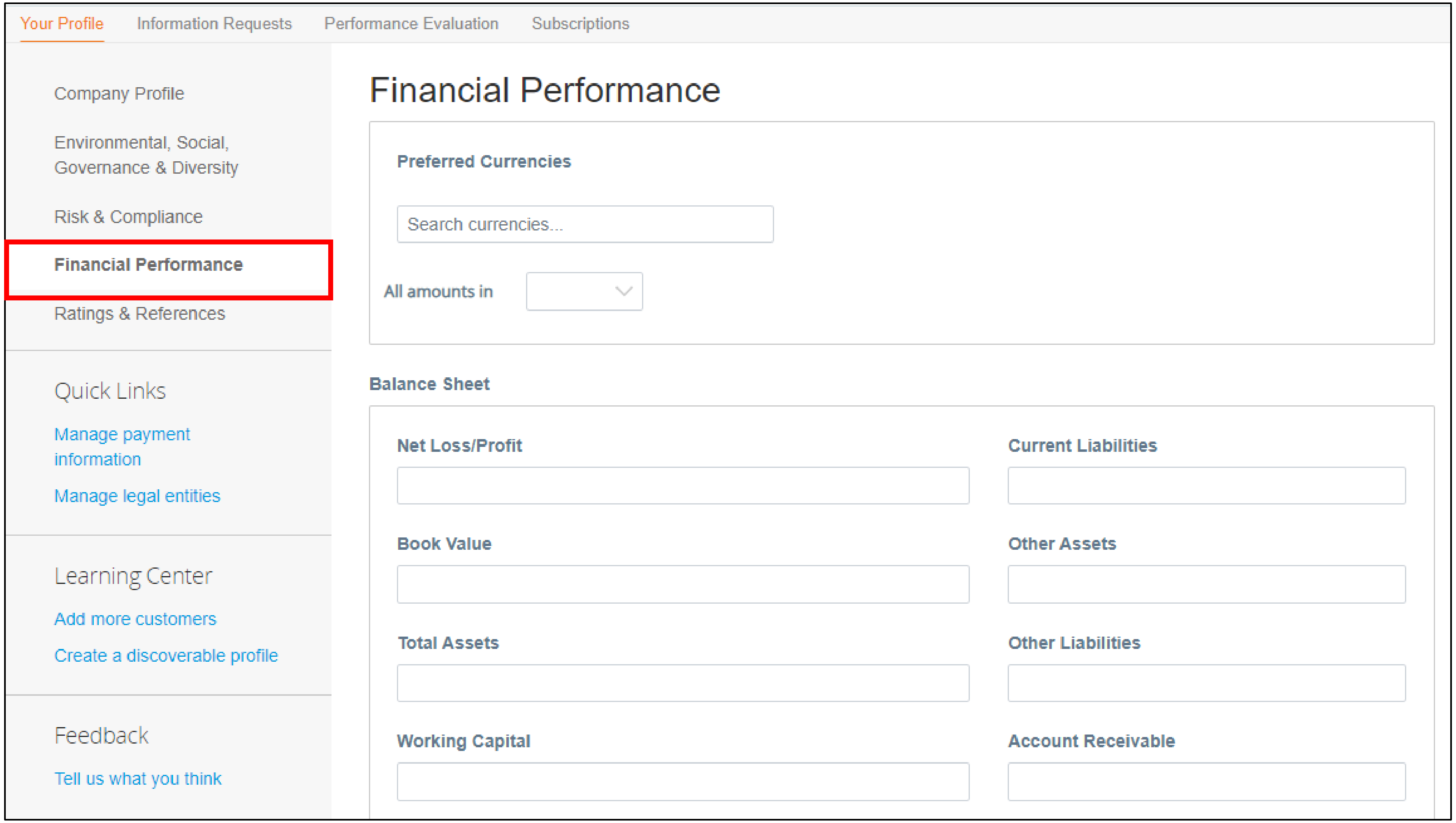
The Risk & Compliance section gives your customers information the risk and compliance considerations they need to understand to do business with your company.



# Coupa Supplier Portal | Manage Profile

## 4. Financial Performance

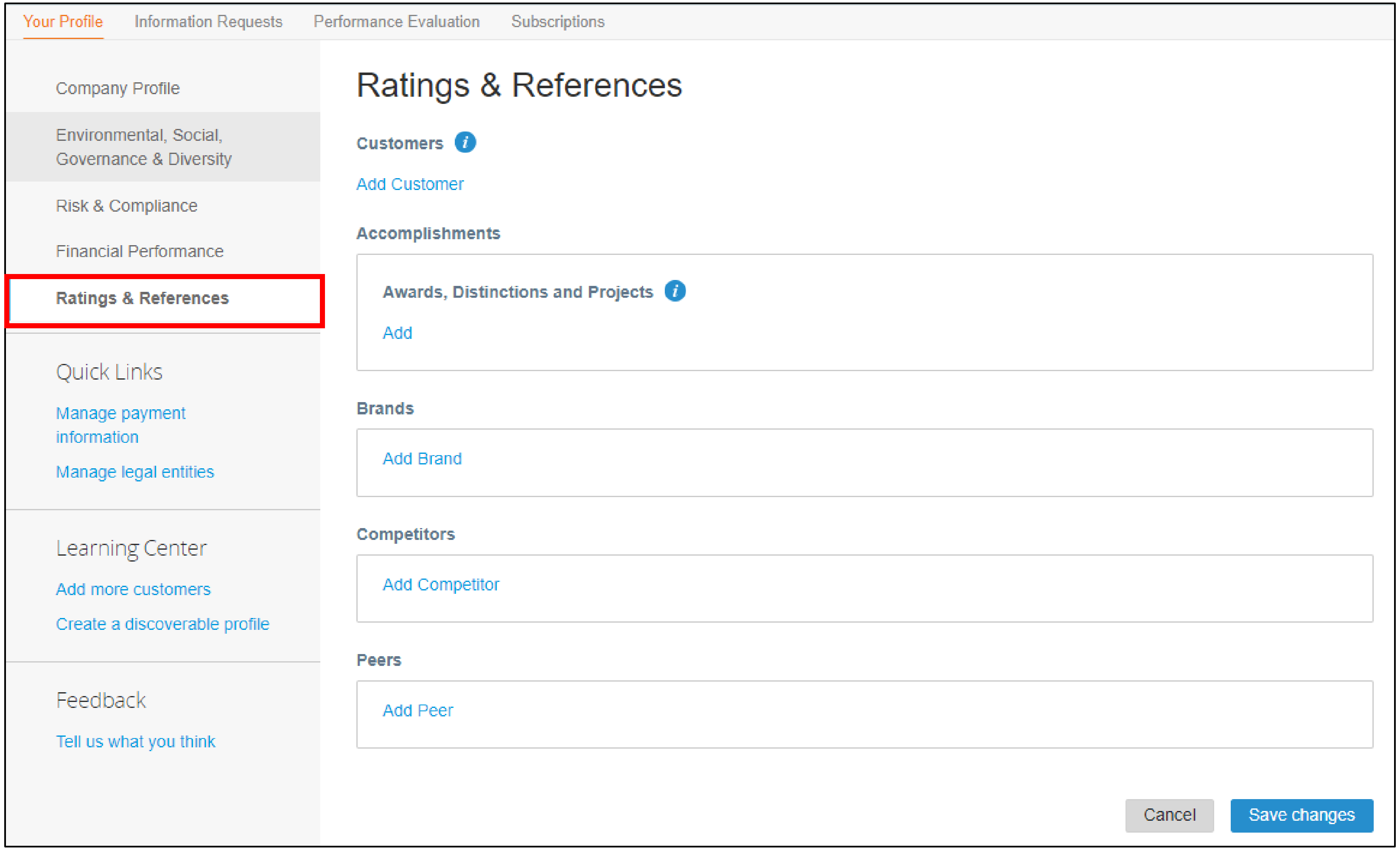
The Financial Performance section shows information about your business's financials. This section doesn't display on your profile, and you can choose to include it on your profile PDF.



# Coupa Supplier Portal | Manage Profile

## 5. Ratings & References

The Ratings & References section shows information about who you do business with, your accomplishments, and your competition and peers.

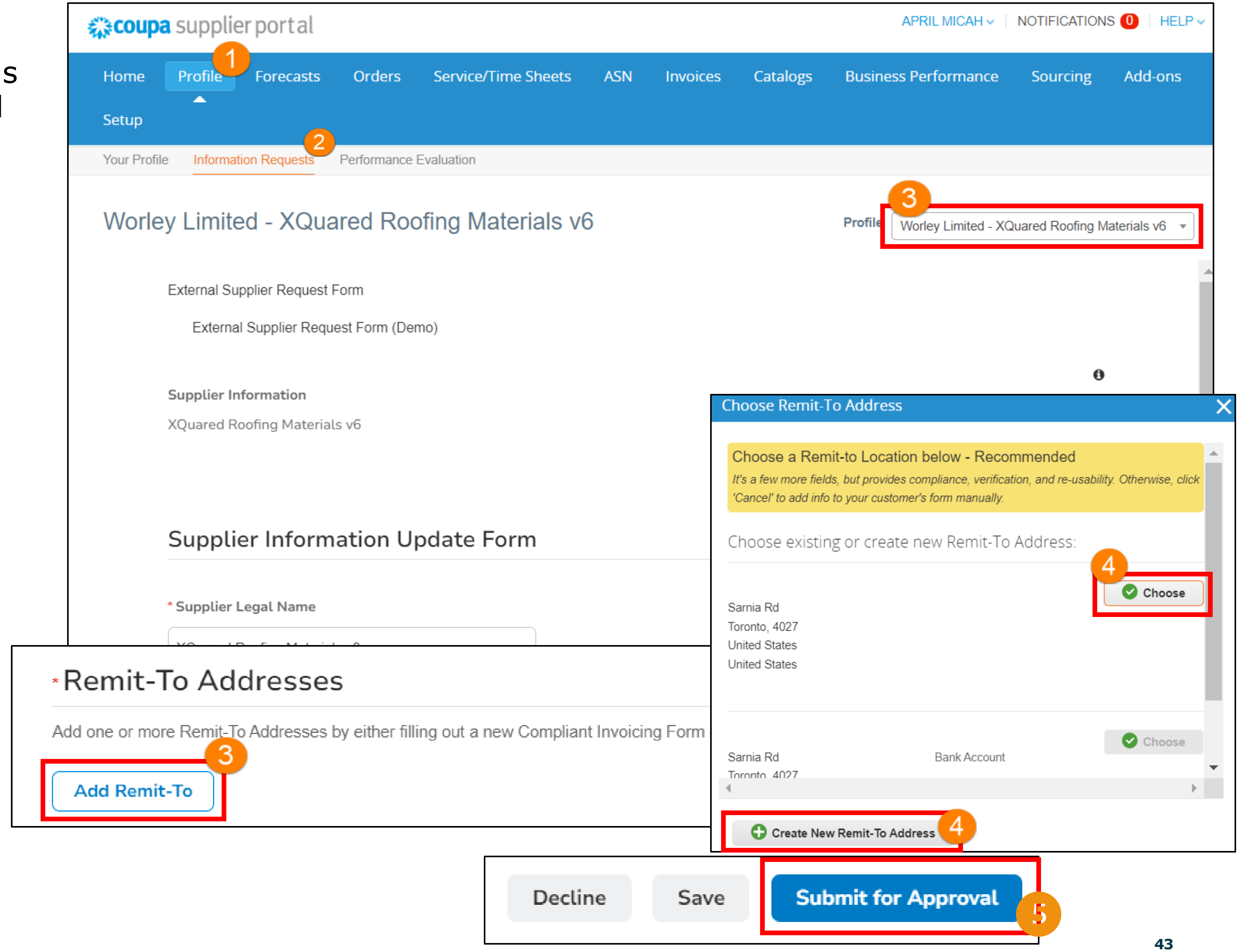


# Coupa Supplier Portal | Manage Profile

## B. Customer Profile

In the Coupa Supplier Portal, you have profiles for each of your customers you are connected to which allows you to customize the information you provide to your customers. Some of your customers may send you Information Requests that you complete to update your information with that customer.

1. Go to **Profile** > **Information Requests**. You can also access Information Requests by clicking links in notifications.
2. Select your customer from the Profile dropdown menu.
3. If the Information Request includes Remit-To Addresses, select **Add Remit-To**.
4. In the Choose Remit-To Address window, you can select **Choose** next to the existing addresses you want to send to your Customer, or you can select **Create New Remit-To Address** to add a new address.
5. Once all supplier information fields are completed, click **Submit for Approval**.



# Coupa Supplier Portal | Manage Profile


You have the option to make your Profile public so that other companies can reach out to you to join their vendor database.
Only limited information will be made available.

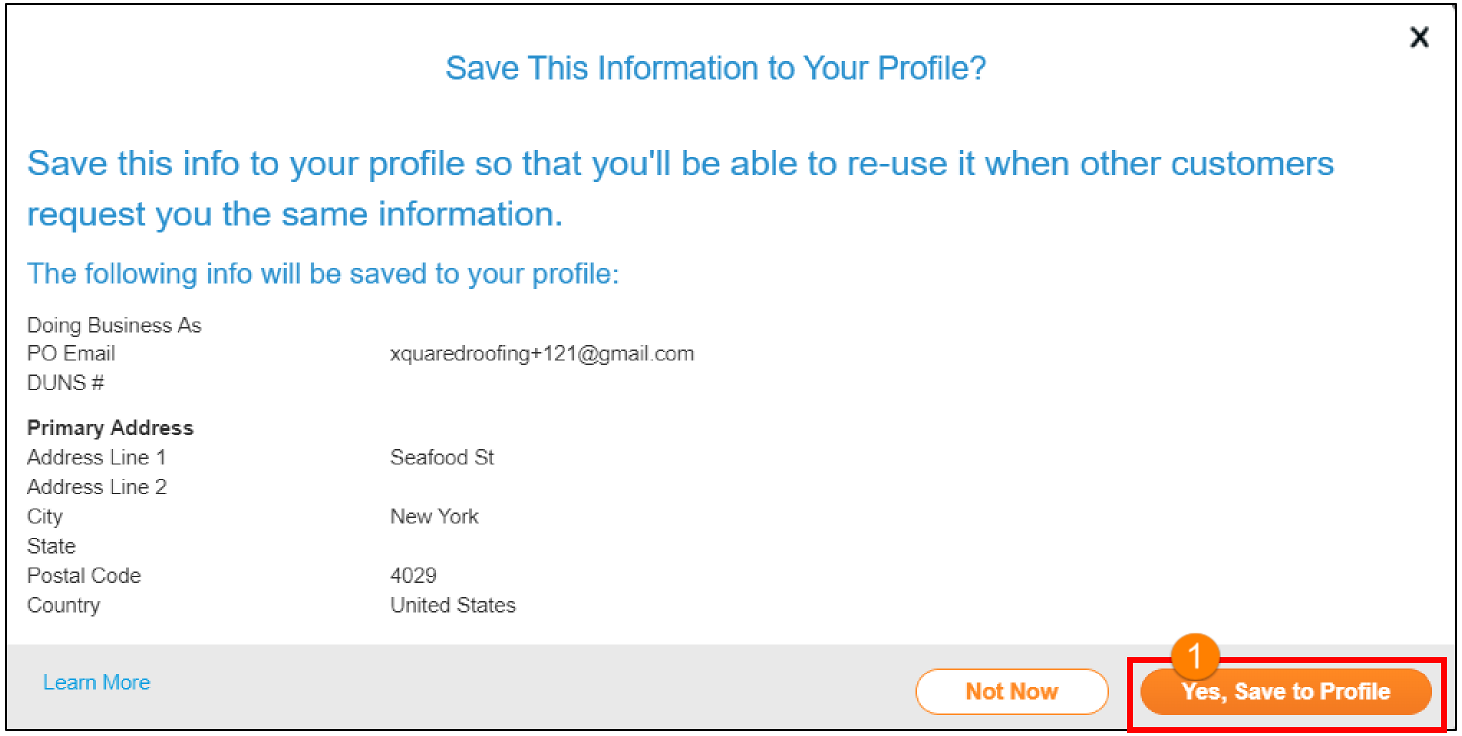
# Coupa Supplier Portal | Manage Profile

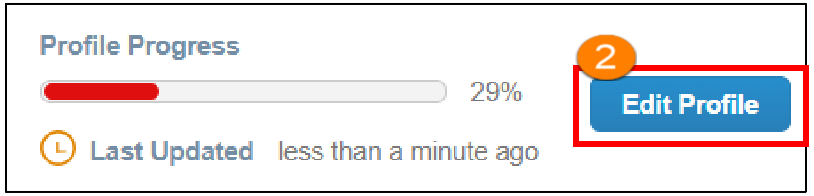
## C. Copy to Public Profile

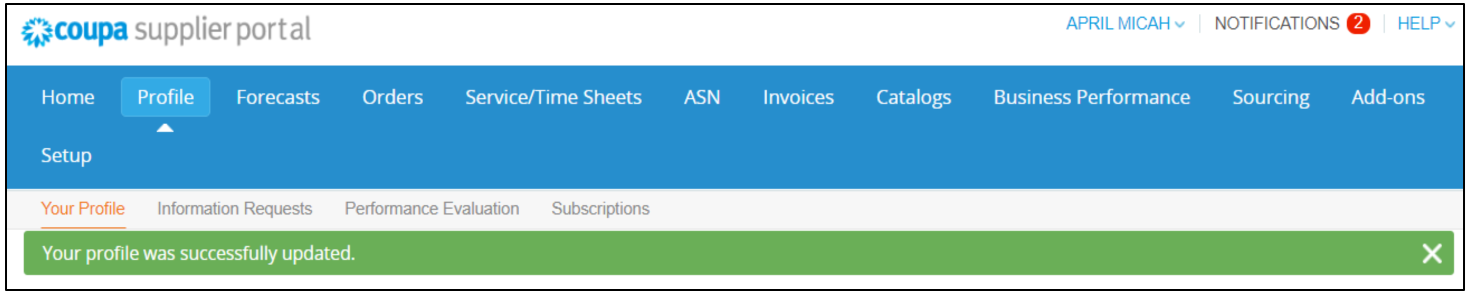
After the update of the New vendor Info, Supplier will be prompted with an option to copy the SIM profile to a Public Profile

1. Click **Yes, Save to Profile.**

2. You can also go directly to the Profile tab and click **Edit Profile** to update the public information.



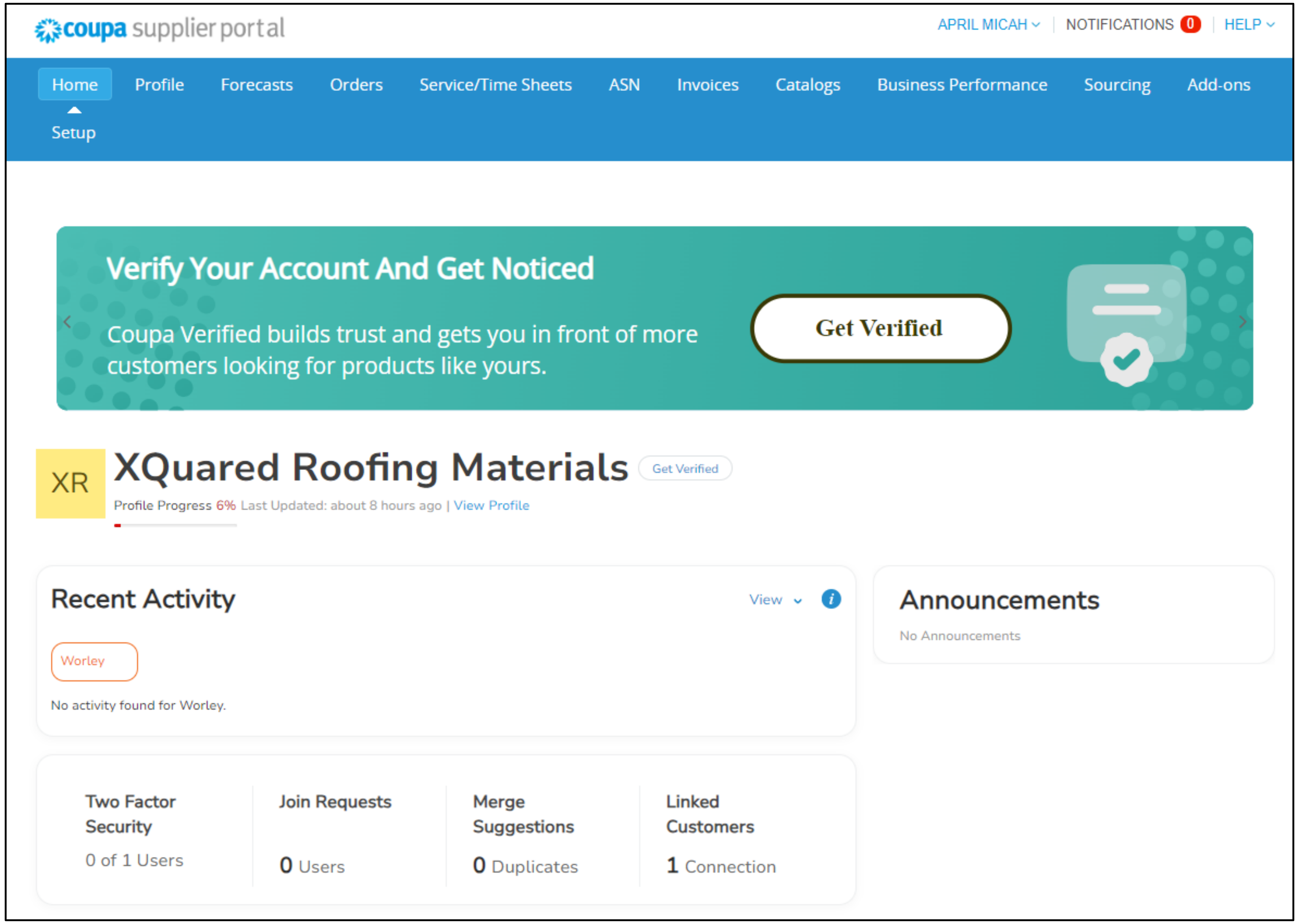
# Coupa Supplier Portal Homepage

# Coupa Supplier Portal | Homepage

## Coupa Homepage – Profile Summary

In the Coupa Supplier Portal Homepage, the following details are displayed:

- **Recent Activity**
- **Announcements** - Your customers can create announcements to communicate with you about initiatives, promotions, and changes required for your collaboration through the portal.
- **Two Factor Security**
- **Join Requests**
- **Merge Suggestions** - Your company may have more than one account/profile in the portal. This can happen when several users from the same company register or are invited to the Coupa Supplier Portal through different email addresses.
- **Linked Customers** – Displays the count of your linked customers in the portal.



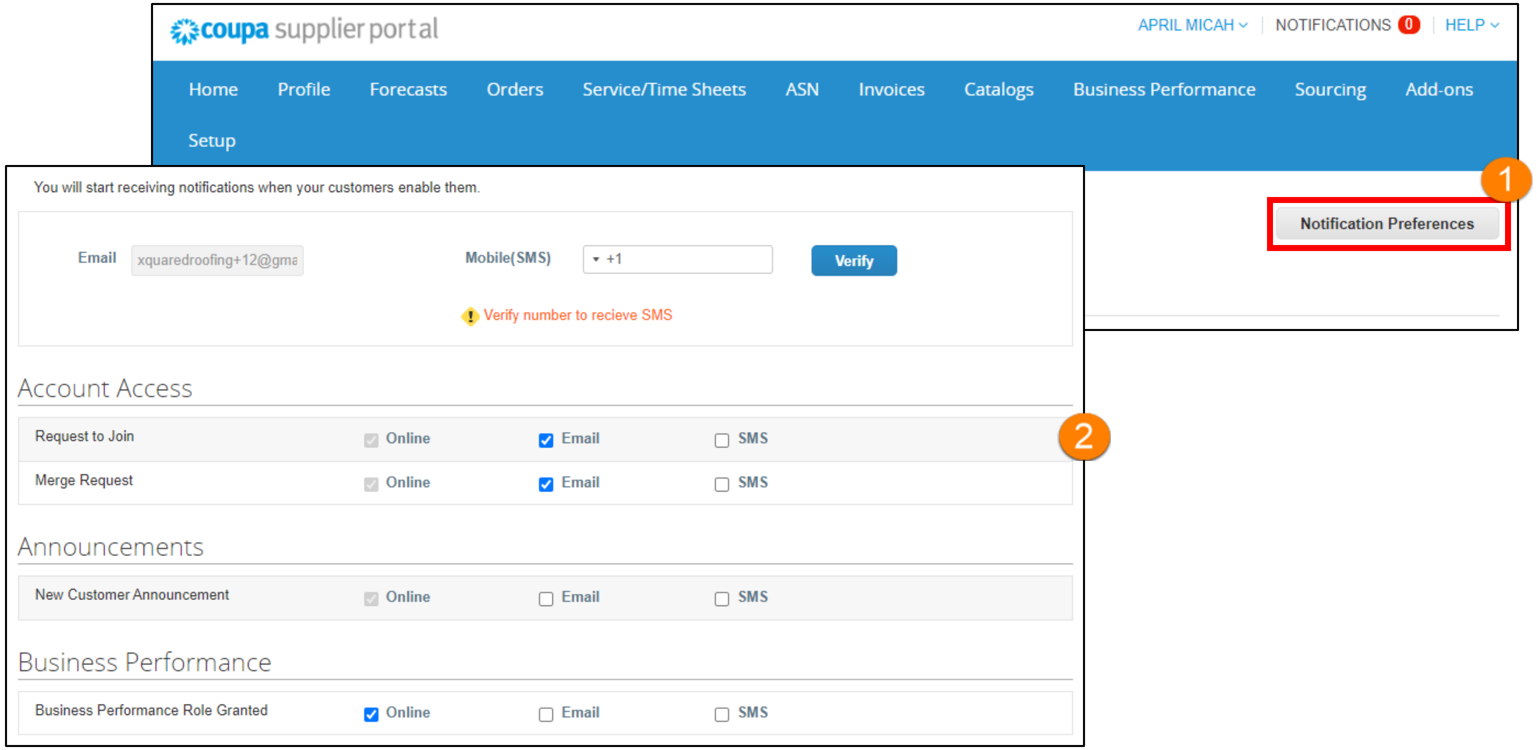
# Manage Account Settings

# Coupa Supplier Portal | Notification Preference

- The Supplier will receive a notification in Coupa Supplier Portal based on the Notifications preferences setup.
- The Supplier will be able to select the notifications they want to receive and can select the channel to receive the notification which can be via Online (Coupa Supplier Portal), Email and SMS.

**Steps on how to setup notification preferences:**

1. Beside your username, click **Notifications** then click **Notification Preferences**.
2. Select the type of notification(s) and the preferred channel(s) on which to receive the notification.



# Coupa Supplier Portal | My Account

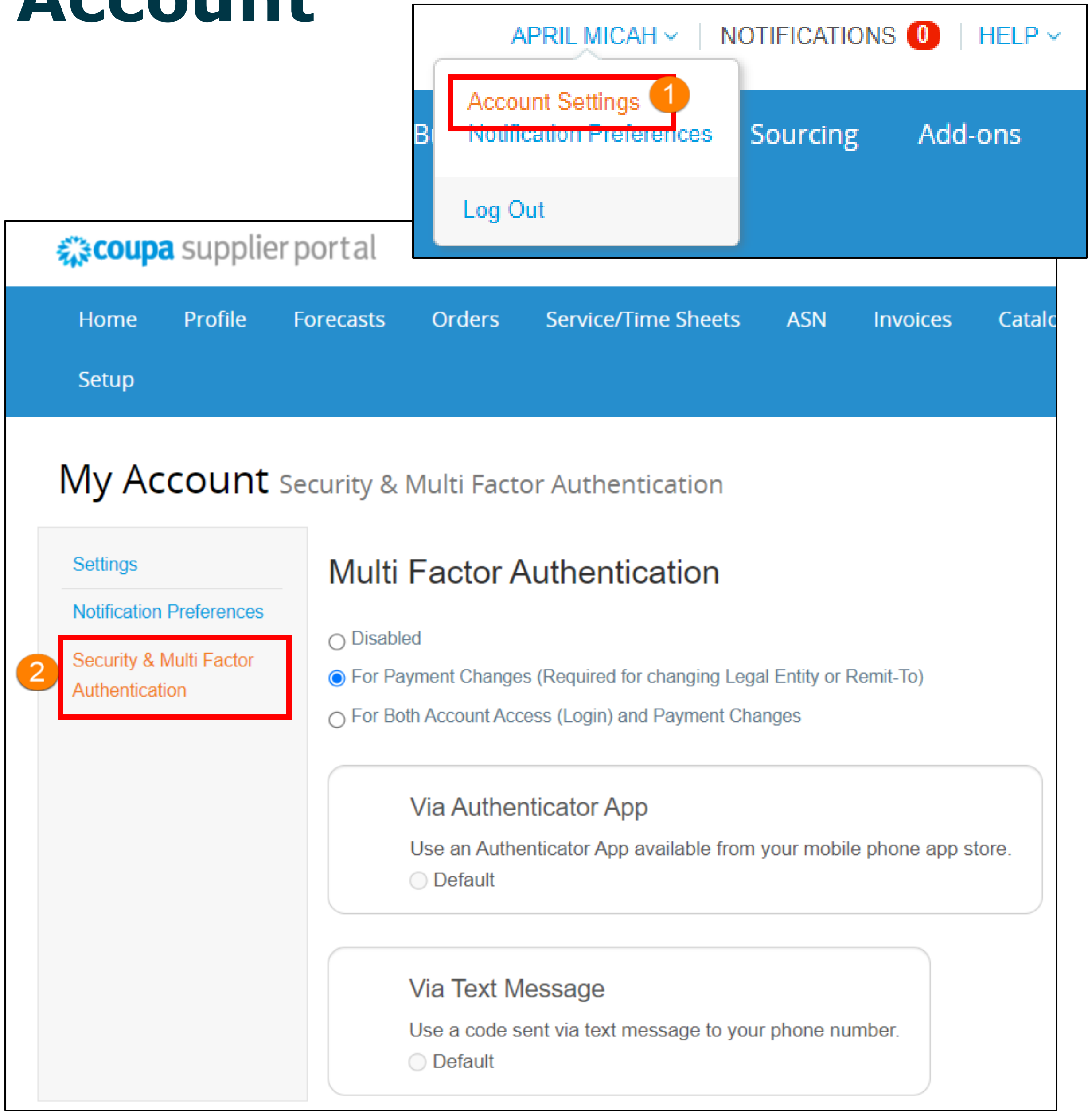
**Coupa Security & Two-Factor Authentication**

When the Supplier logs in for the first time, they are prompted to enable two-factor authentication.

If they have enabled two-factor authentication for SMS, check text messages to get the verification code.

**The Supplier can also enable two-factor authentication by following the below steps:**

1. Hover your mouse on your username and click **Account Settings**.
2. Click **Security & Multi Factor Authentication**.



# Coupa Supplier Portal | My Account

## If Via Authentication App

1. Scan QR using your device.

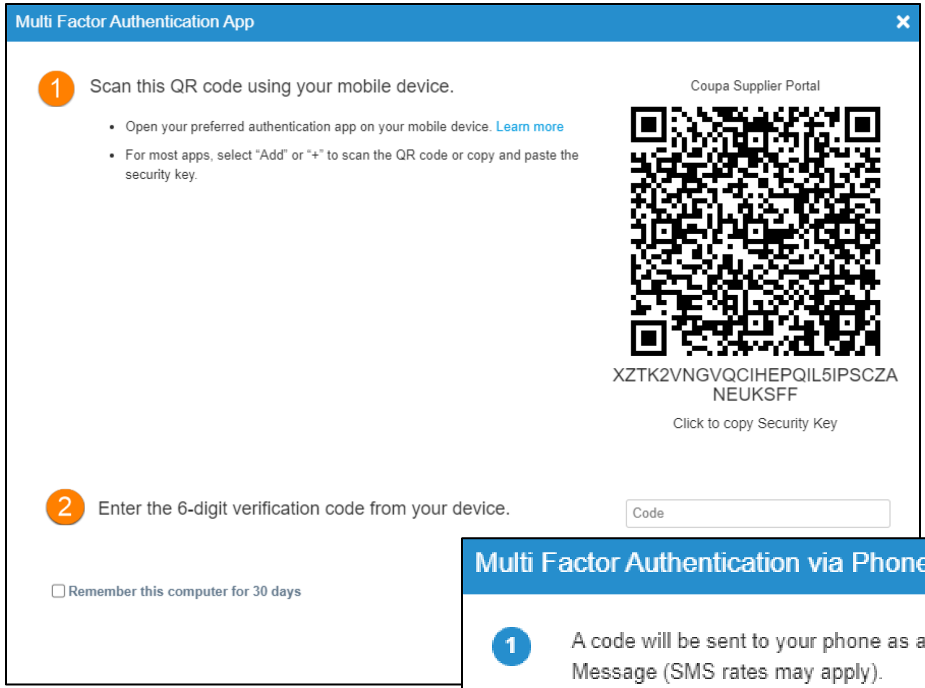
2. Enter the 6-digit verification code from your device.

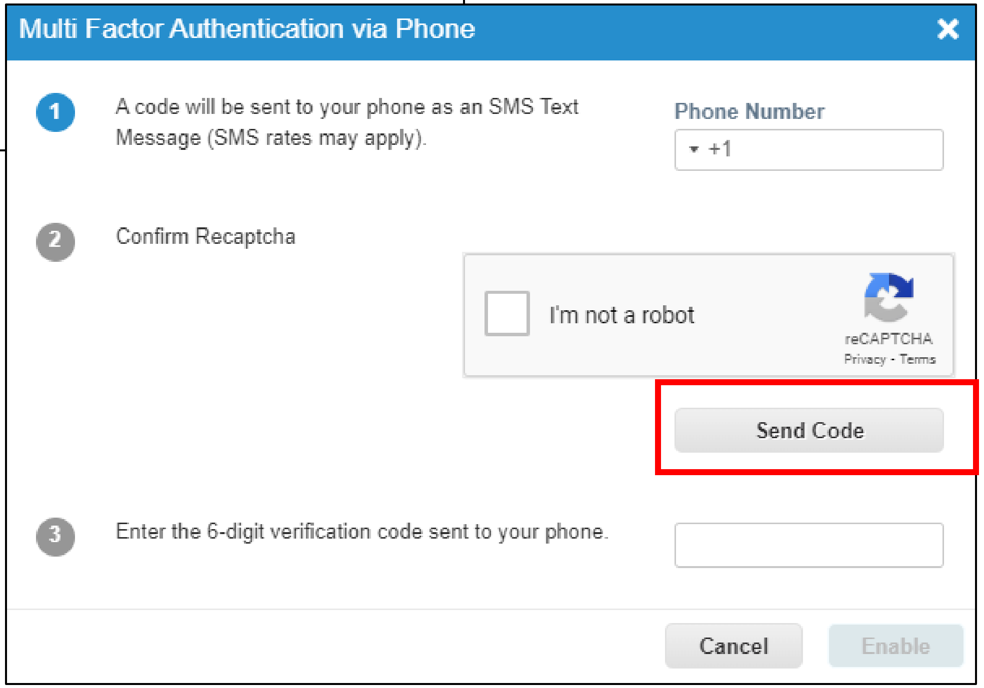
## If Via Text Message

1. Enter the Cell Phone Number to receive the SMS notifications.

2. Confirm Recaptcha then click **Send Code**.

3. Enter the 6-digit verification code sent to your phone.

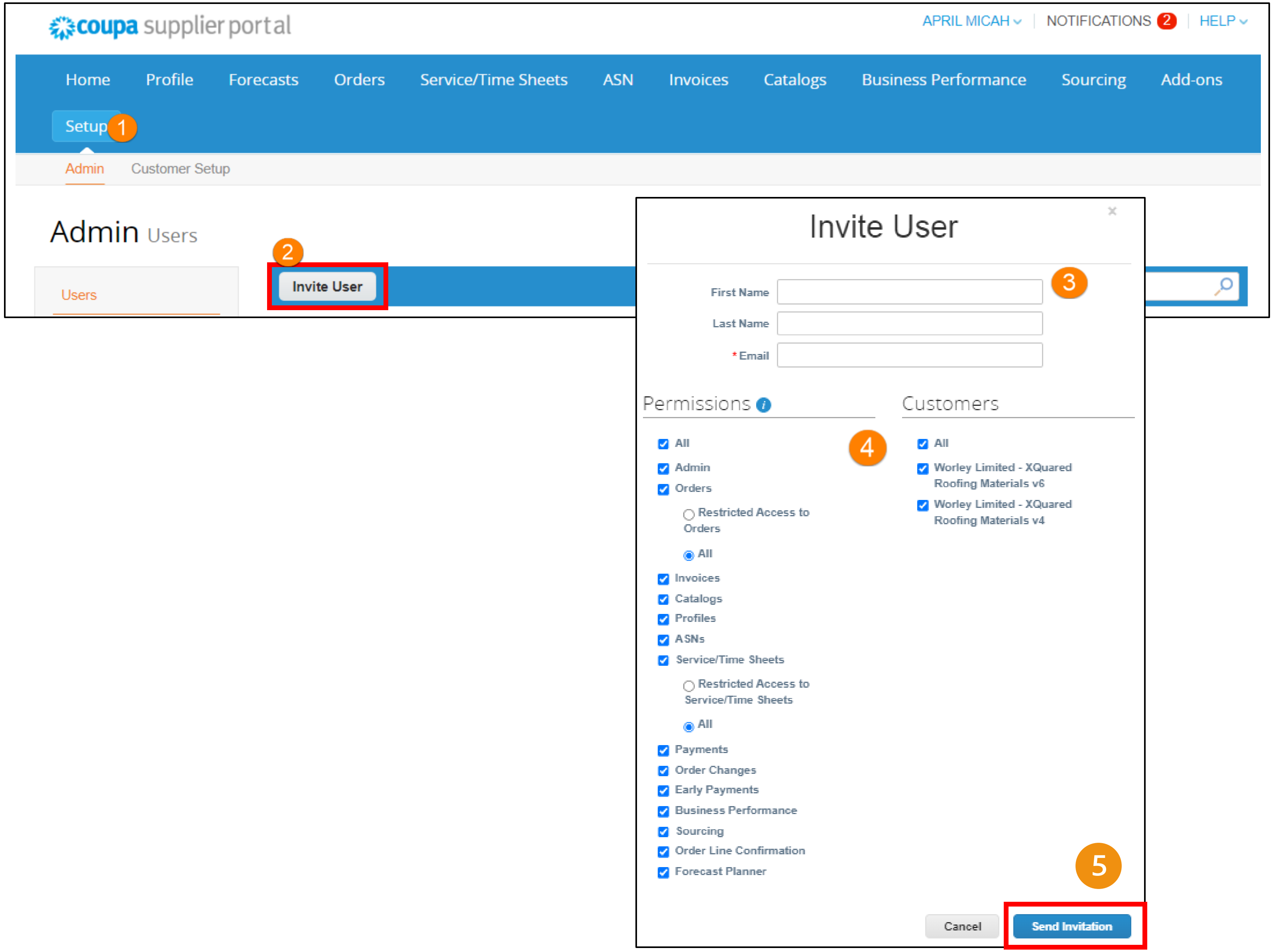


# Admin Setup

# Coupa Supplier Portal | Admin Setup

Go to **Setup** > **Admin** to manage users and merge requests, and the remit-to addresses for your customers, and other transactions within the portal.




## A. Users

Invite new users and manage what each user can do in the CSP and which customers your users can interact with.

1. Go to **Setup** >**Admin**
2. Navigate to Users section and click **Invite User**
3. Add **First Name**, **Last Name** and **Email**
4. Tick/Untick Permissions and select customer Name
5. Click **Send Invitation**

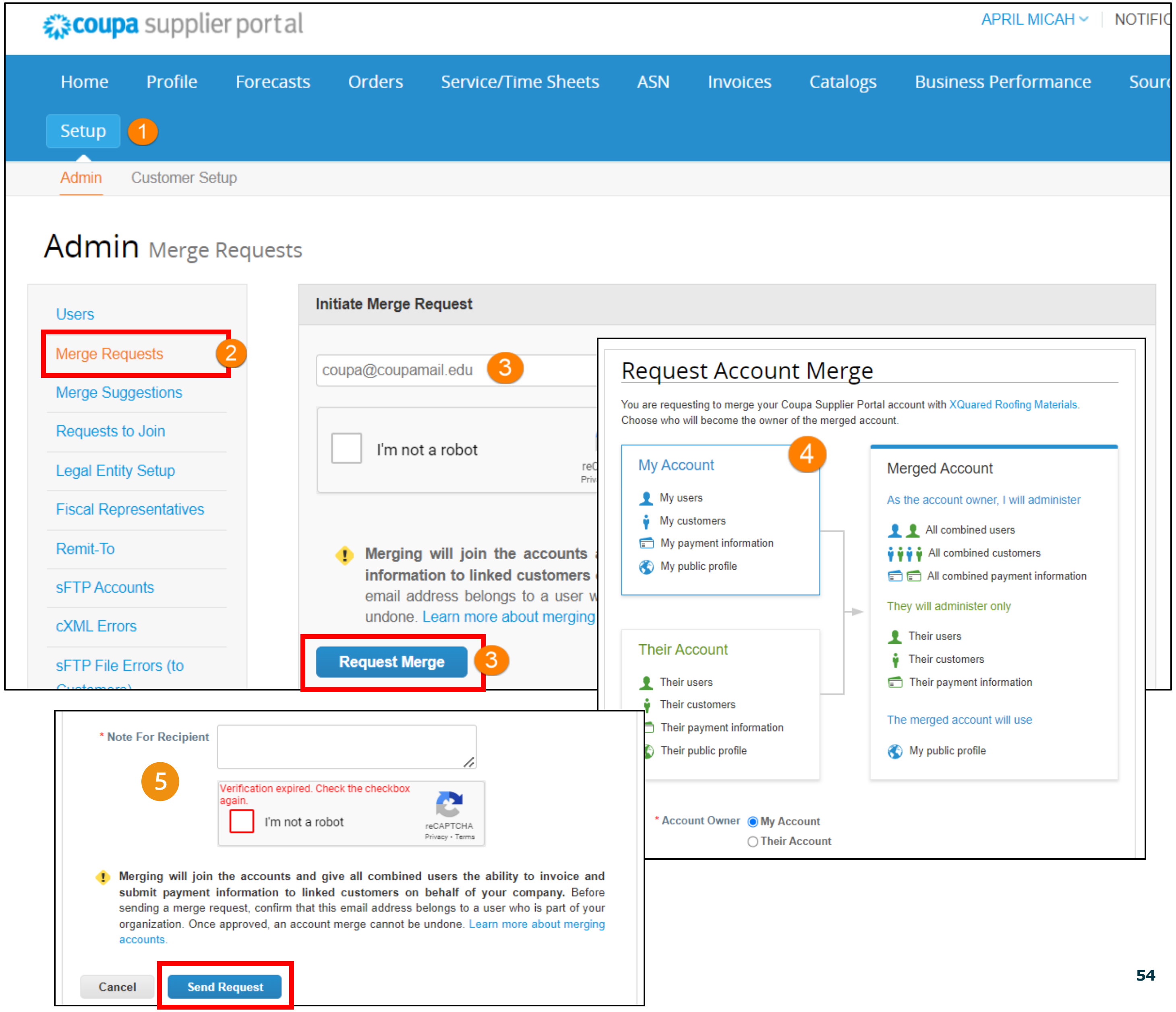
# Coupa Supplier Portal | Admin Setup

## B. Merge Requests

This is used for companies with multiple accounts to reduce confusion for existing and potential customers.

## To Merge:

1. Go to **Setup** tab
2. Click **Merge Requests**
3. Enter **Email** and Click **Request Merge**
4. On the opening popup window, Choose who will become the Account owner.
5. Add **Note to Recipient** and verify Captcha
6. Click **Send Request**



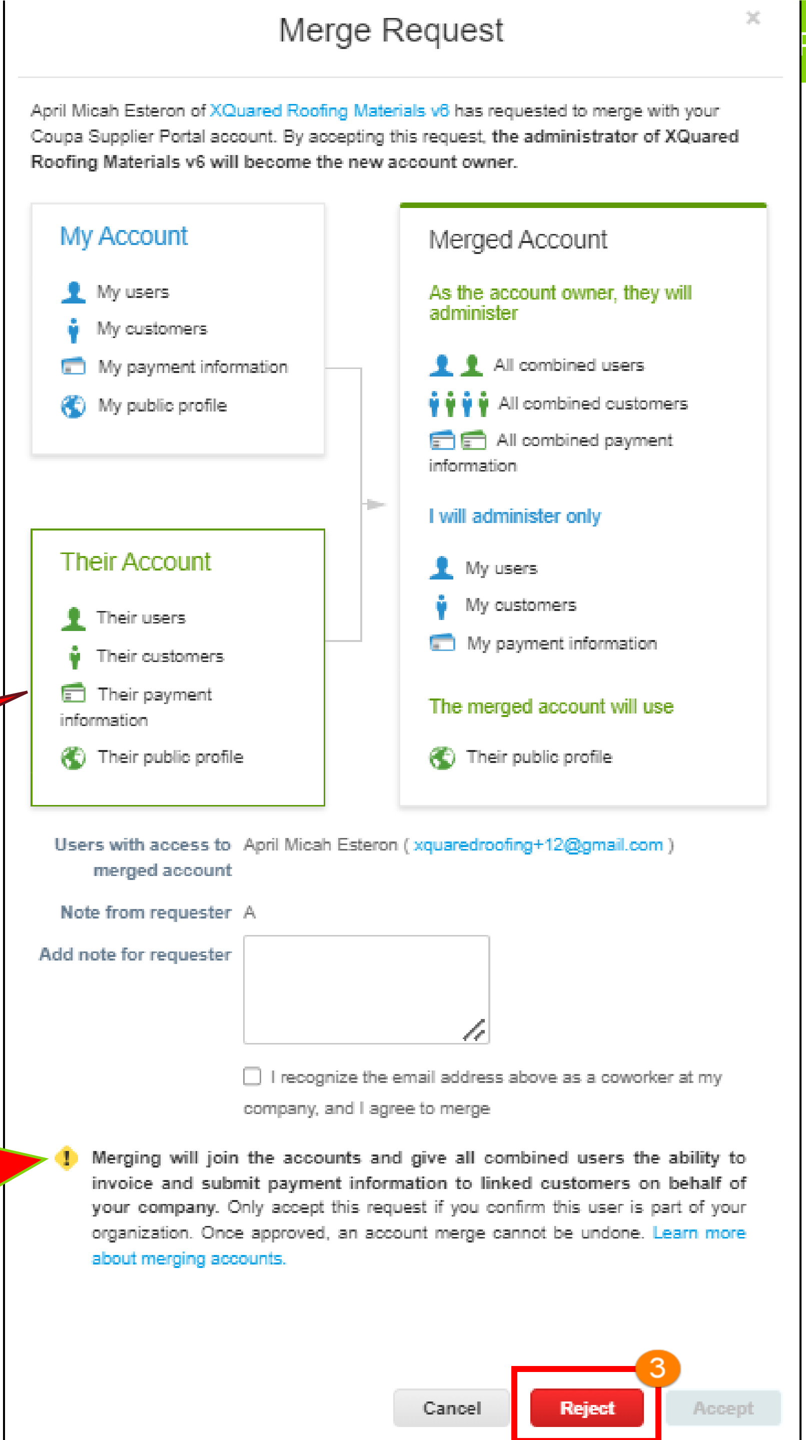
Portal (#2)

## B.1 Respond to Merge Account Request

1. From **Admin** page, select **Merge Requests**
2. Navigate to Open Merge Requests and Click **Respond**
3. On the opening popup window, **Accept** or **Reject** the request.


When you select either your account or the other account to be the account owner, the Coupa Supplier Portal shows you a visual representation of who controls what data after the merge.

Account merges cannot be undone. Use caution when merging accounts and be sure to verify that the account you are merging with is part of your organization.



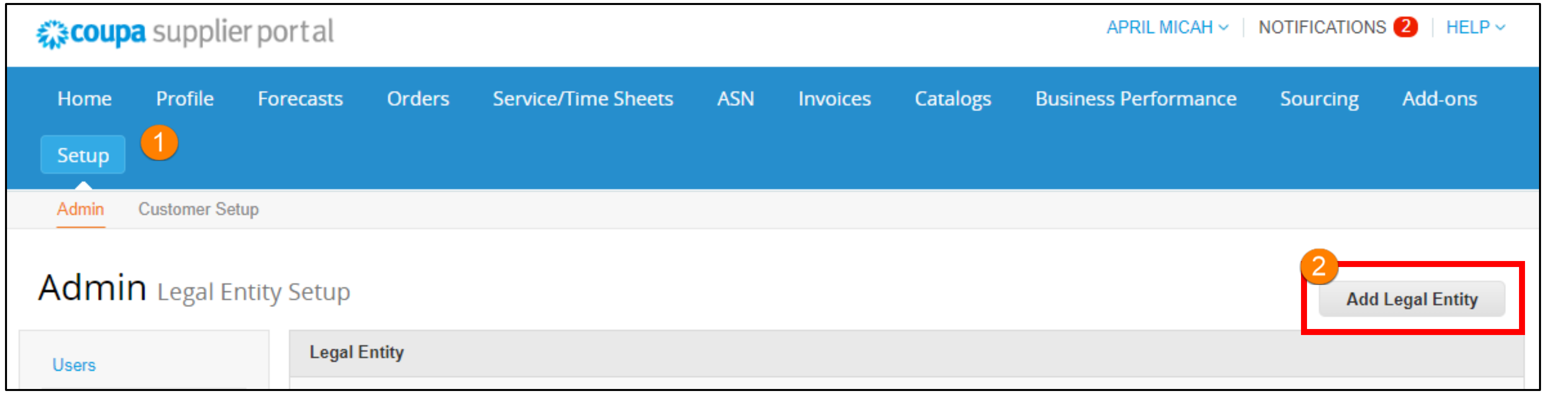
# Coupa Supplier Portal | Admin Setup

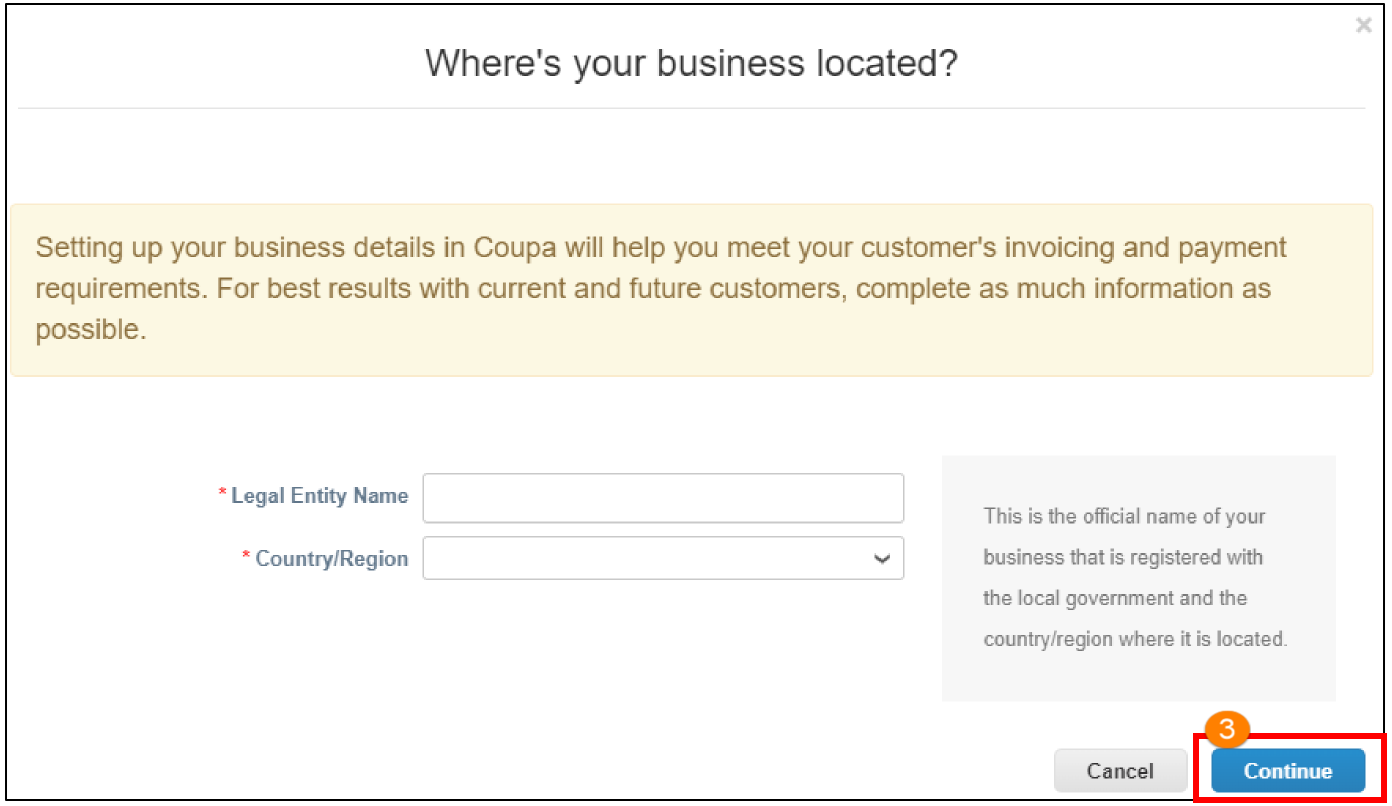
## C. Legal Entity

A legal entity is a representation of your company and gives your Coupa customers the information they need to do business with you, including addresses, payment methods, and remit-to details.

## C.1 Add Legal Entity

1. Go to **Setup** > **Admin** > **Legal Entity Setup**
2. Click on **Add Legal Entity** in the top right corner.
3. Enter the official name of your business that is registered with the local government and select the country/region where it is located and select **Continue**.

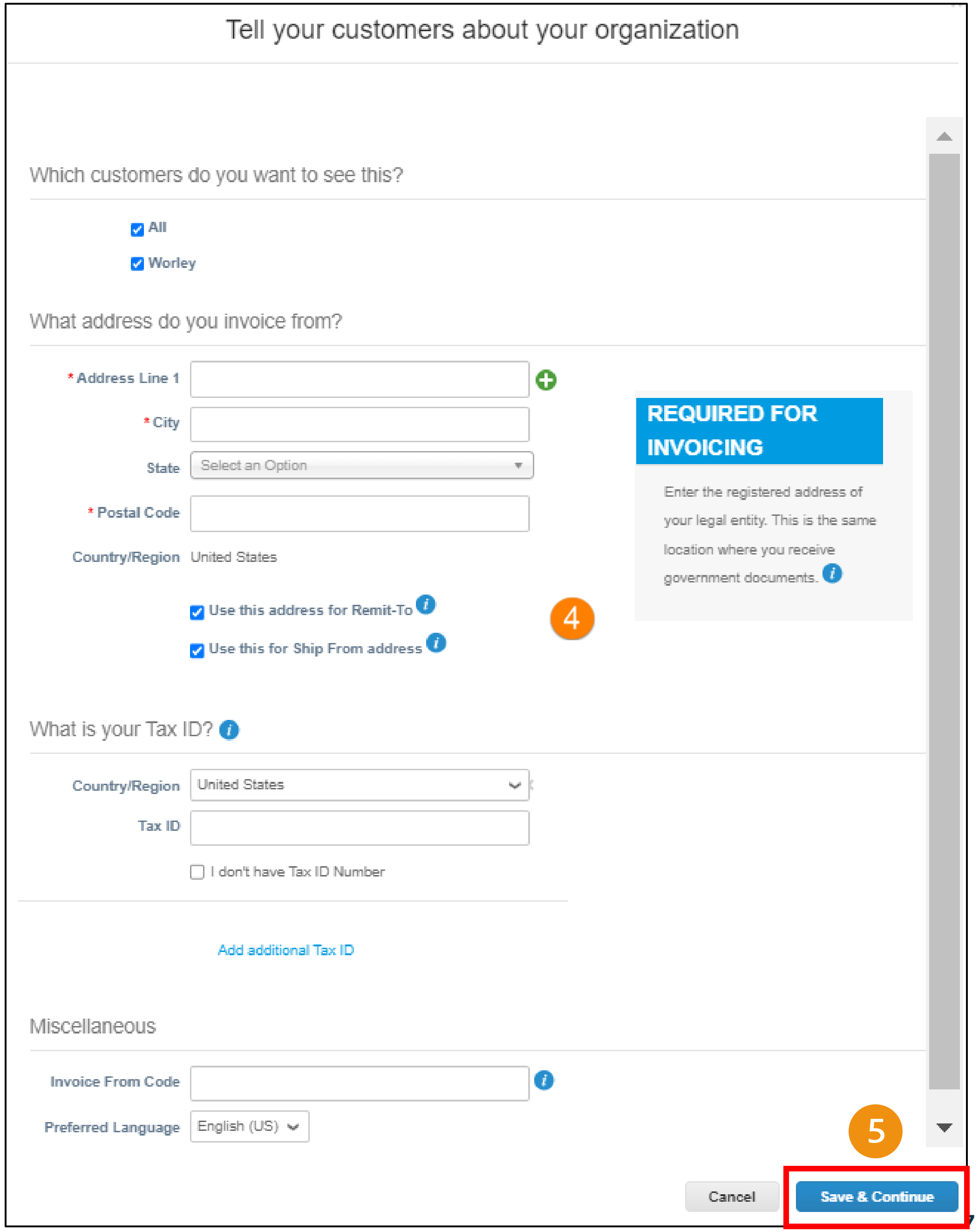


# Coupa Supplier Portal | Admin Setup

## C.1 Add Legal Entity (CONTINUED)

4. On the Tell your customers about your organization page, complete the fields.
5. Select **Save & Continue**.



# Coupa Supplier Portal | Admin Setup

## C.1 Add Legal Entity (CONTINUED)

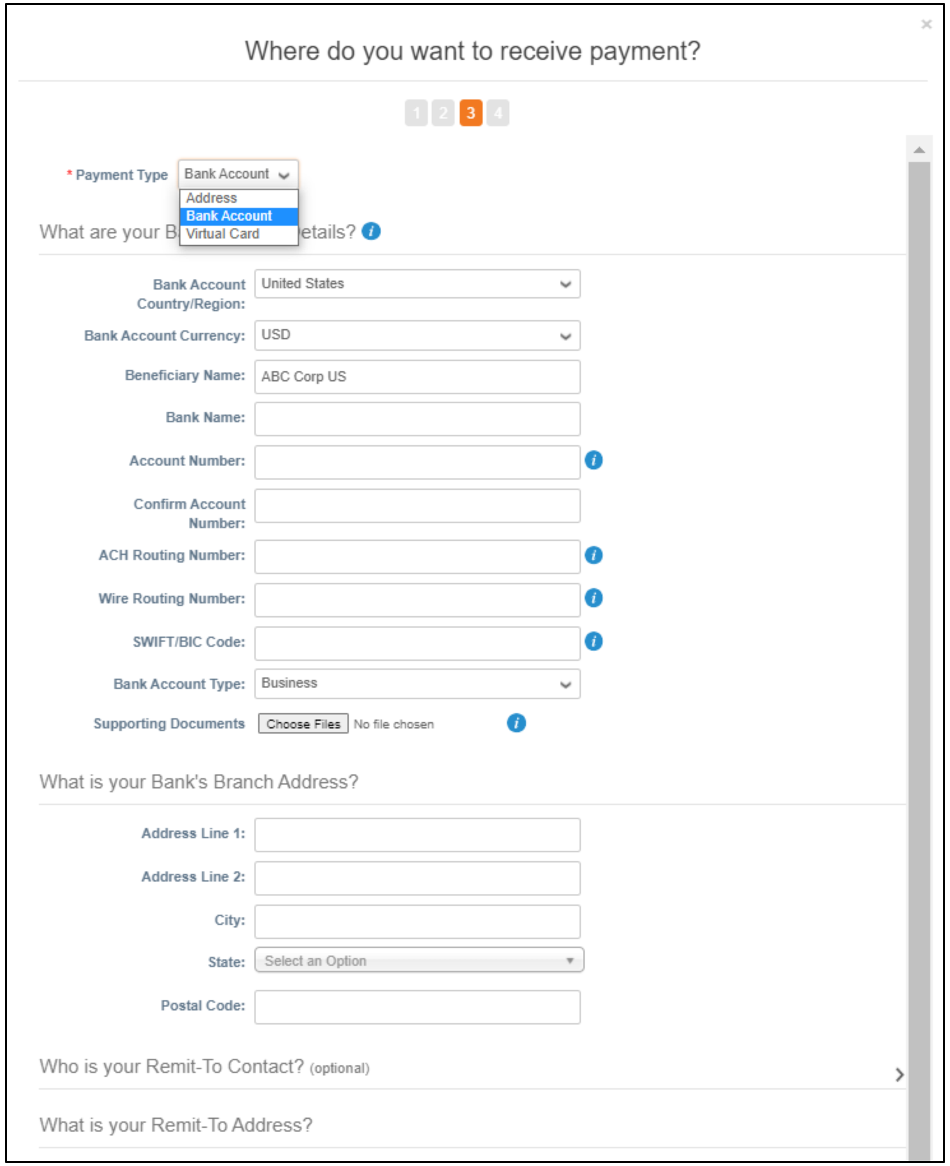
6. On the **Where do you want to receive payment?** page, select how you'd like to be paid in **the Payment Type** selector

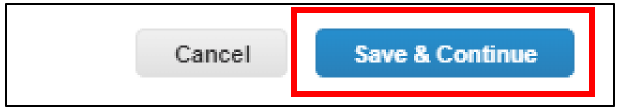
   **Address** - You receive physical checks at the address listed. If you selected

   **Bank Account** - You receive payment via deposit into your bank account. If you select this option, the bank account sections and fields appear. The available bank account fields and field names depend on the selected country. Banking information is required for compliant invoicing in some countries when indicated. Otherwise, banking information is not required and remains private.

   **Virtual Card** - You receive payment via a virtual card sent to you through an encrypted email.

7. Select **Save & Continue**.



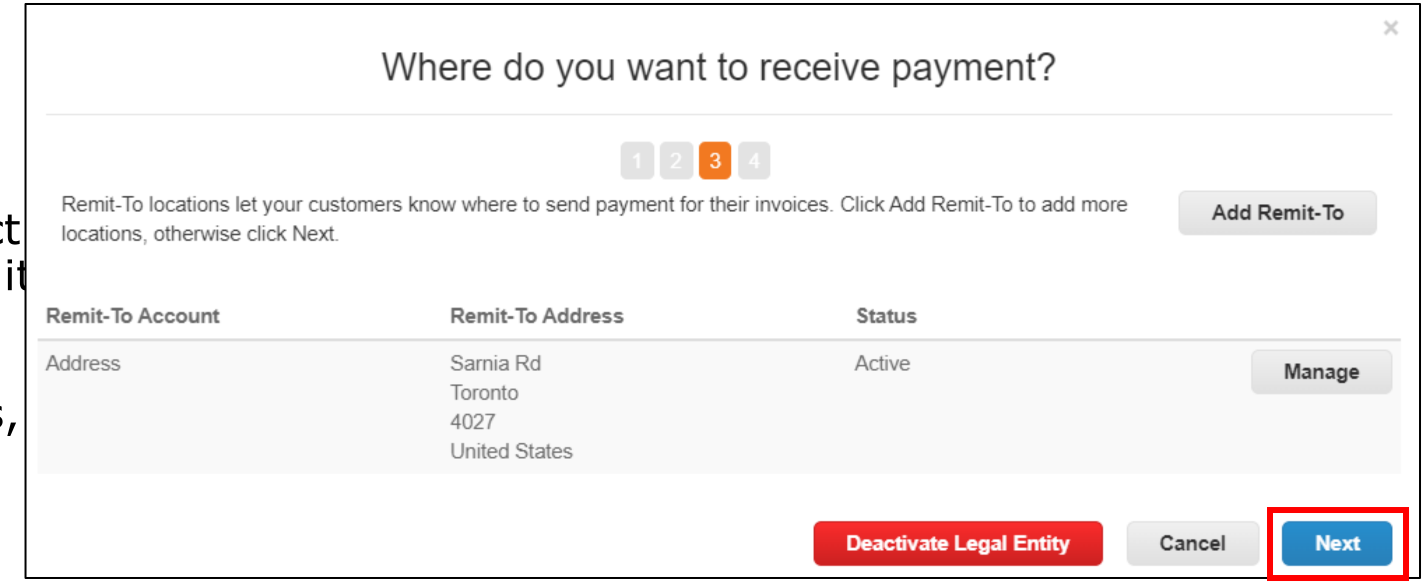



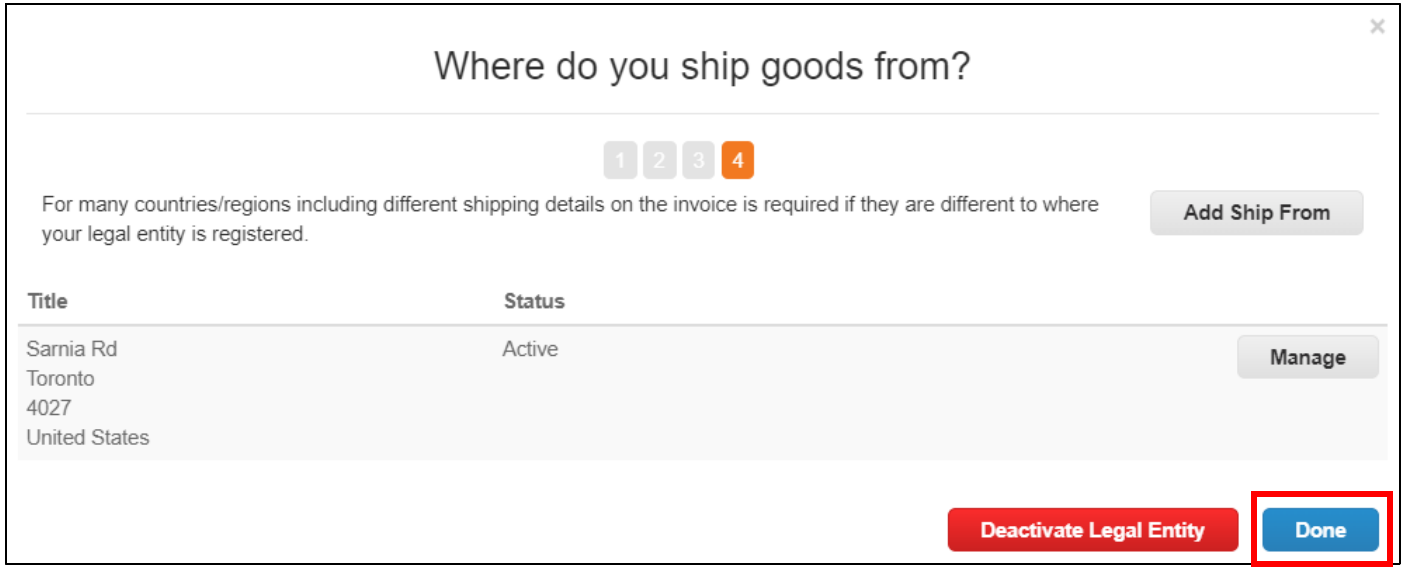
# Coupa Supplier Portal | Admin Setup

## C.1 Add Legal Entity (CONTINUED)

8. The following screen summarizes your remit-to account details. You can select Add Remit-To to add an additional remit to address or you can select Manage next to an existing remit-to to edit it. Once you are finished making changes, select **Next**.

9. On the **Where do you ship goods from?** page, add your ship-from address, remit-to integration code, contact information, and the Coupa customers who can use this remit-to account. Click **Done**.



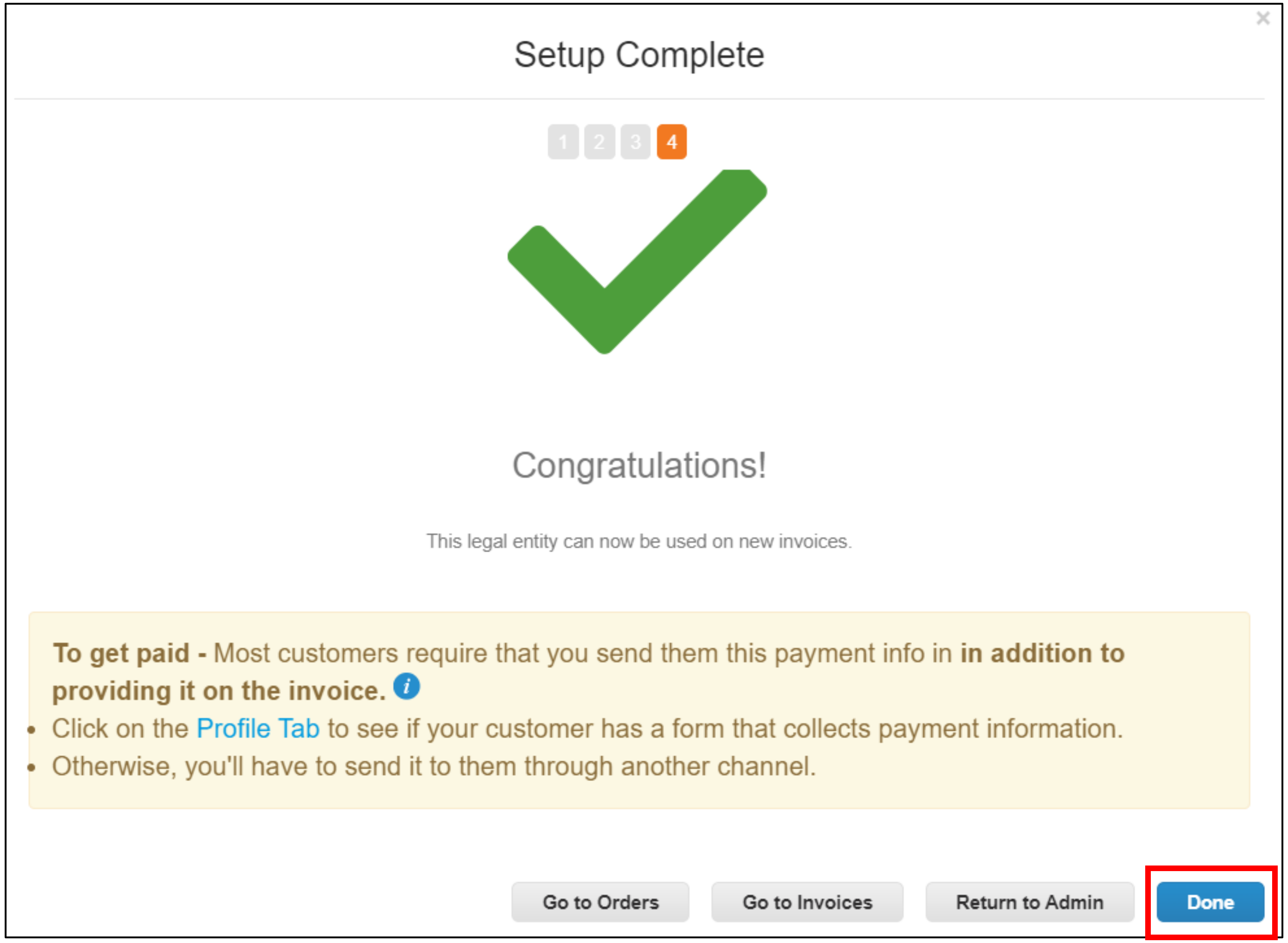



# Coupa Supplier Portal | Admin Setup

## C.1 Add Legal Entity (CONTINUED)

10. The Setup Complete page confirms that your legal entity setup is complete and that you can use it on invoices.

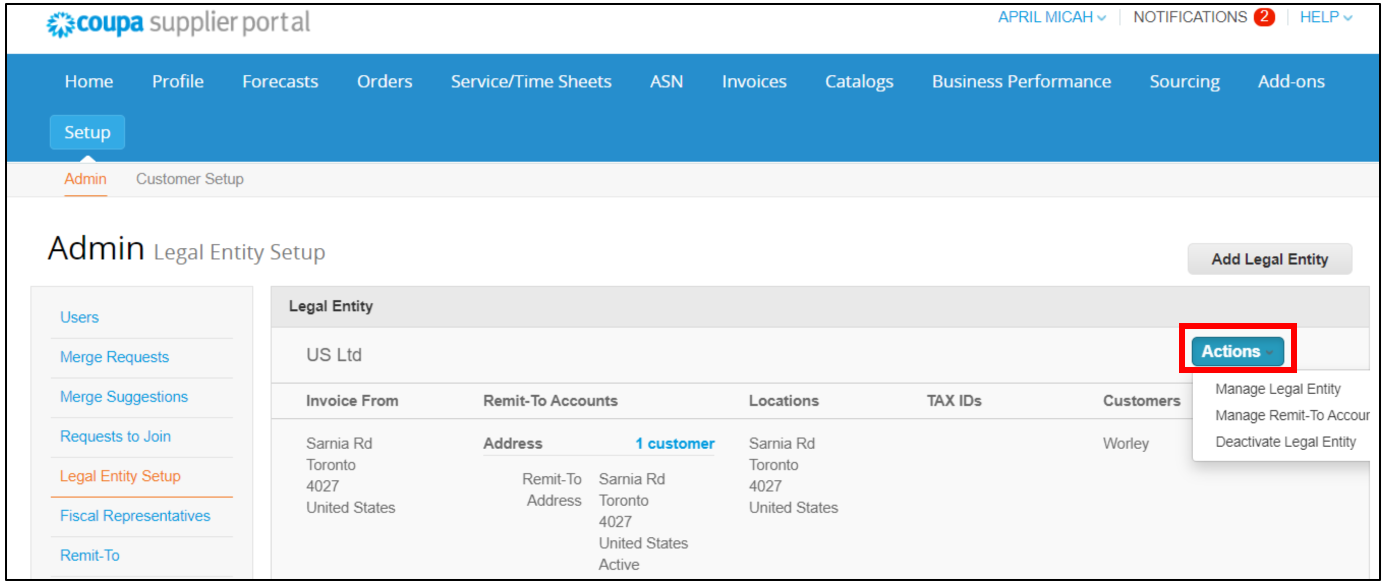
    Select whether you'd like to go to Orders, Invoices, or Return to Admin or select Done to return to the Legal Entities page.



# Coupa Supplier Portal | Admin Setup

## C.2 Modify Legal Entities

1. Go to **Setup** > **Admin** > **Legal Entity Setup.**
2. Next to the legal entity you want to modify, select **Actions**.
3. You can select **Manage Legal Entity**, **Manage Remit-To Accounts**, and **Deactivate Legal Entity.**




| Option | Description |
|---|---|
| **Manage Legal Entity** | Opens the legal entity setup flow described in the Add a legal entity in the previous slide. You can manage your addresses, but other information is not editable. Create a new legal entity if you need to modify more information. |
| **Manage Remit-To Accounts** | Opens the Add a new Remit-To account window where you can manage existing remit-to accounts or add new remit-to accounts. For more information, see View and Manage Remit-to Information. You can also manage your remit-to information from the **Setup > Admin > Remit-To** page. |
| **Deactivate Legal Entity** | Deactivates the legal entity so that it can't be used by you or your Coupa customer. This action can't be undone. Check with your customer first to ensure that you don't have any interruption in e-invoicing. |

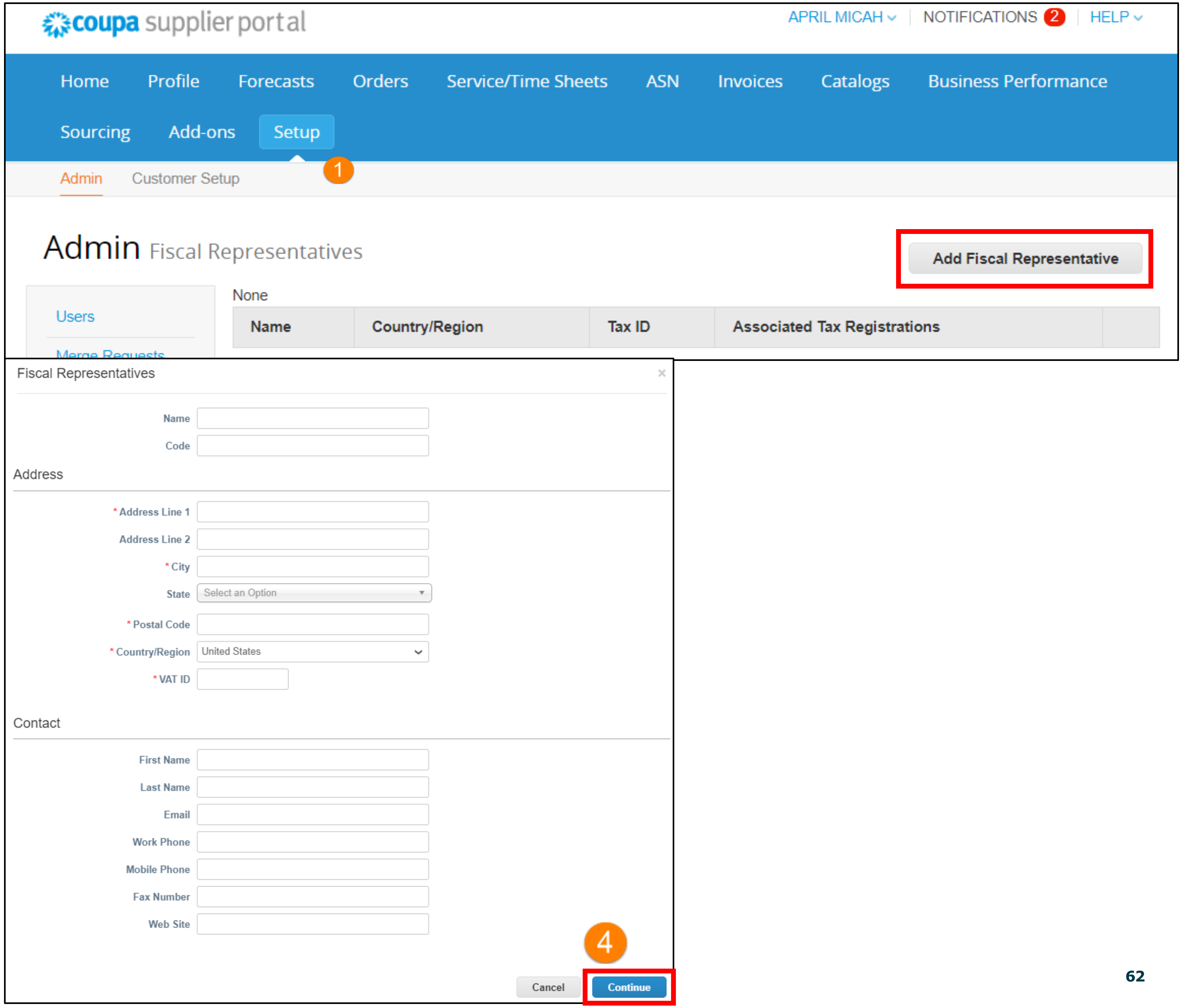
# Coupa Supplier Portal | Admin Setup

## D. Fiscal Representatives

Add fiscal representatives that you need if you have operations in a country/region where you are not registered legally but you need to be represented for tax purposes.

## D.1 Add a Fiscal Representative

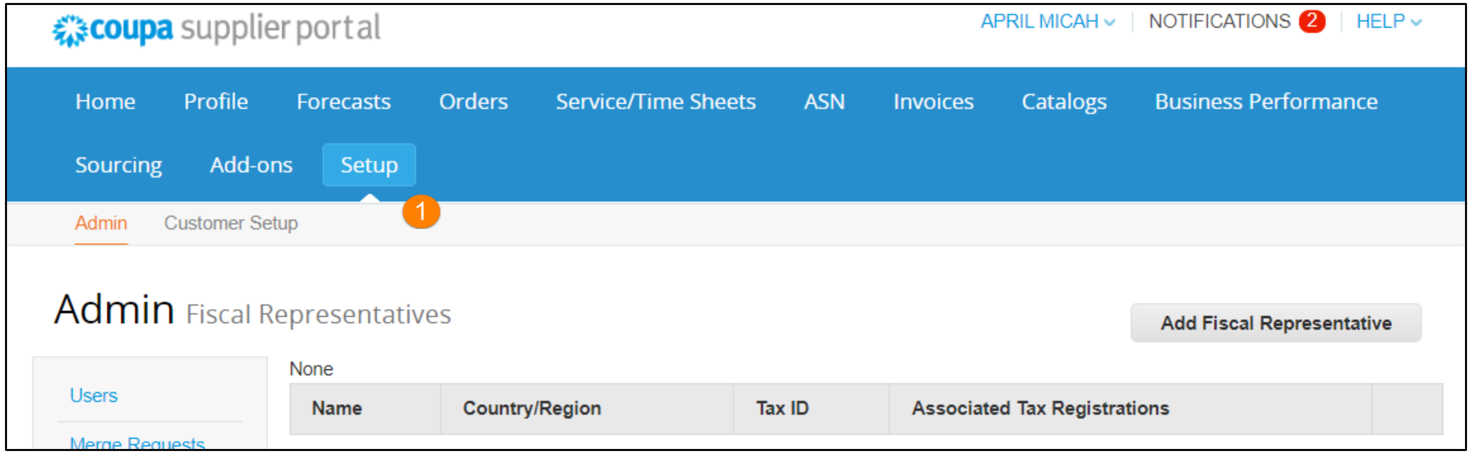
1. Go to **Setup** > **Admin** > **Fiscal Representatives**.
2. Select **Add Fiscal Representative**.
3. In the appearing window, fill in at least the mandatory Address fields (marked with a red asterisk): address line 1, city, postal code, country/region, and VAT ID.
4. Select **Continue**.

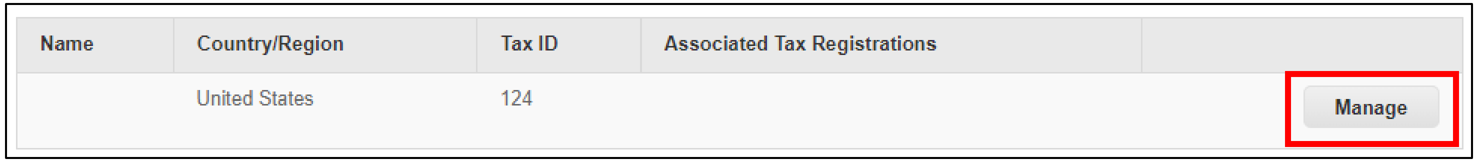


# Coupa Supplier Portal | Admin Setup

## D.2 Edit or Deactivate a Fiscal Representative

1. Go to **Setup** > **Admin** > **Fiscal Representatives**.
2. Select **Manage** next to the fiscal representative you want to modify or deactivate.
   You can modify the Contact fields. To change the other fields, create a new fiscal representative.
3. Select **Deactivate** to deactivate the fiscal representative or modify the fields you want to change and select **Continue**.



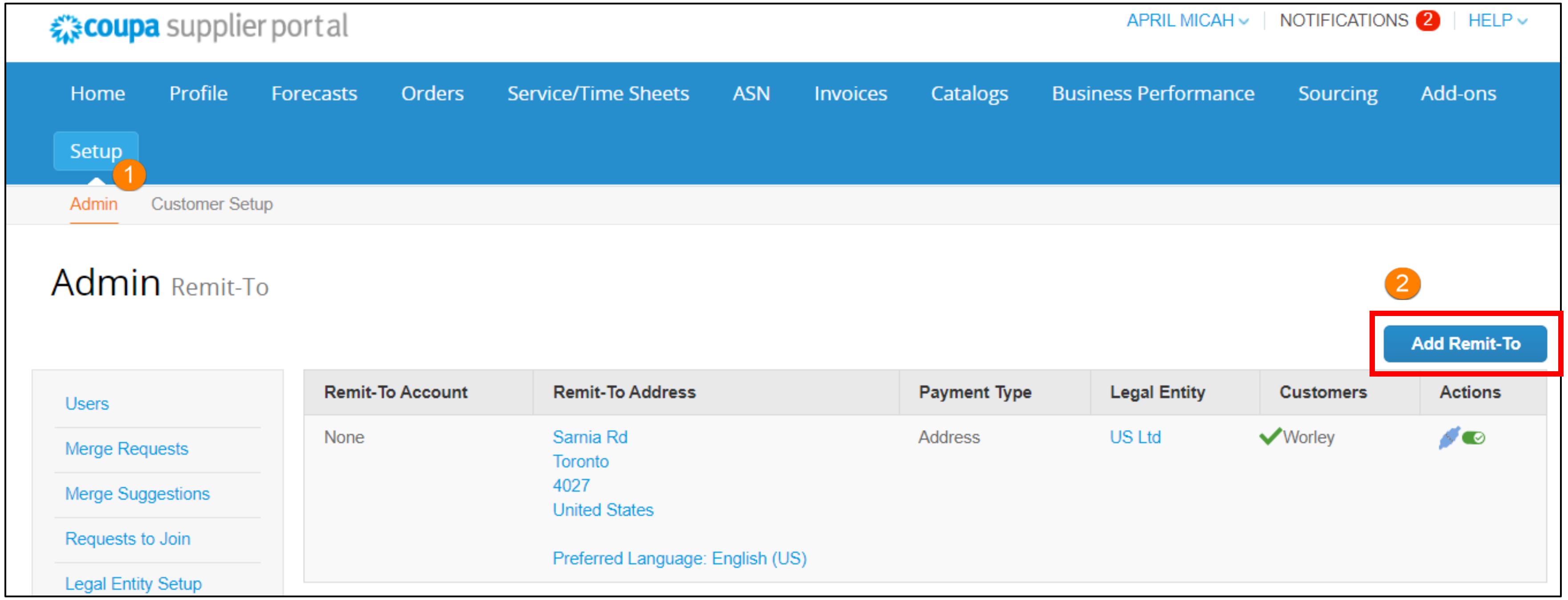




# Coupa Supplier Portal | Admin Setup

## E. Remit To

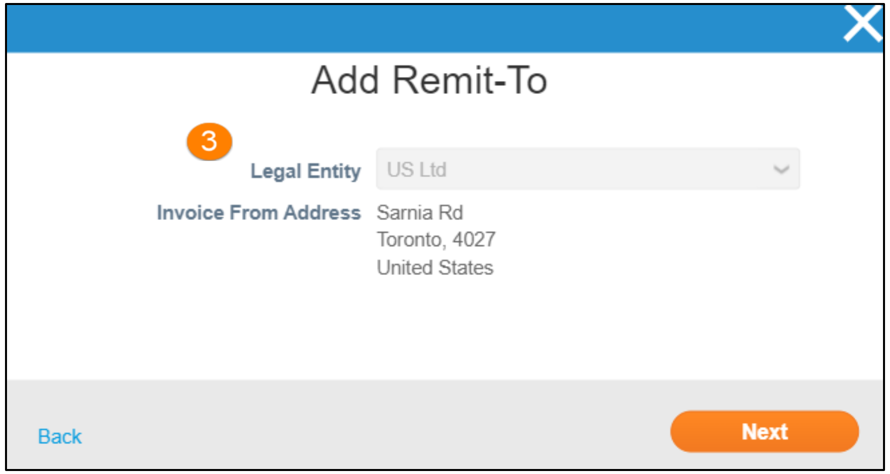
Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information.

**Note:** This can also be added when filling out Information Requests from Worley.




## E.1 Add a Remit-to

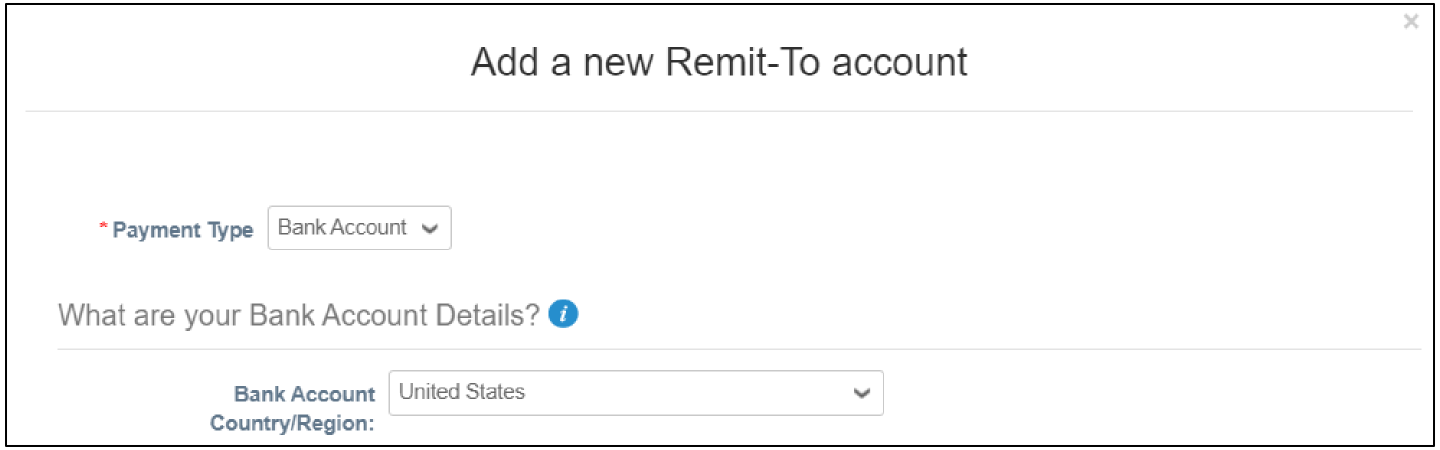
1. Go to **Setup** > **Admin** > **Remit-To**.
2. Select **Add Remit-To**.
3. In the Add Remit-To window that appears, select the legal entity you want your remit-to associated with. If only one legal entity is active, it is selected by default, and you cannot change it.



# Coupa Supplier Portal | Admin Setup

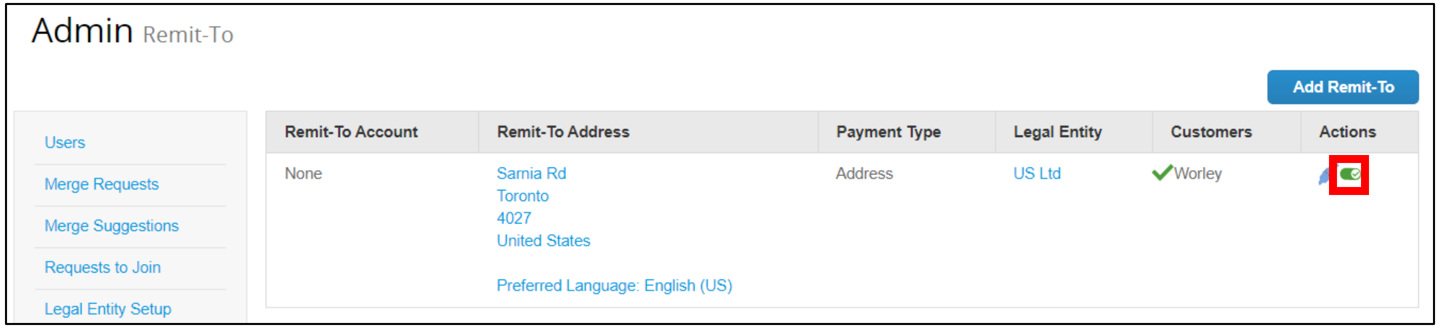
## E.1 Add a Remit-to (CONTINUED)

4. On the **Add a new Remit-To** account page, complete the fields.
5. Select **Save & Continue**. The CSP displays the remit-to page you see during legal entity setup.




## E.2 Deactivate a Remit-to

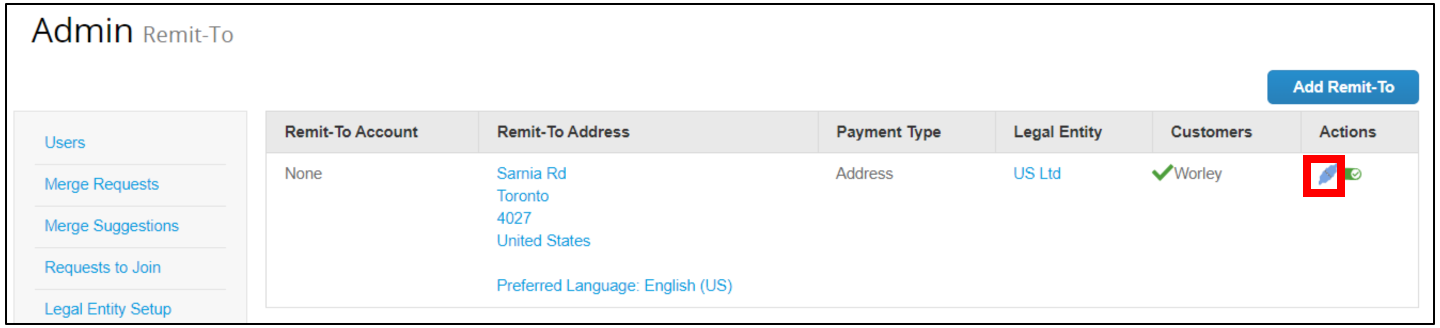
1. Go to **Setup** > **Admin** > **Remit-To.**
2. In the Actions column, select **Disable.**

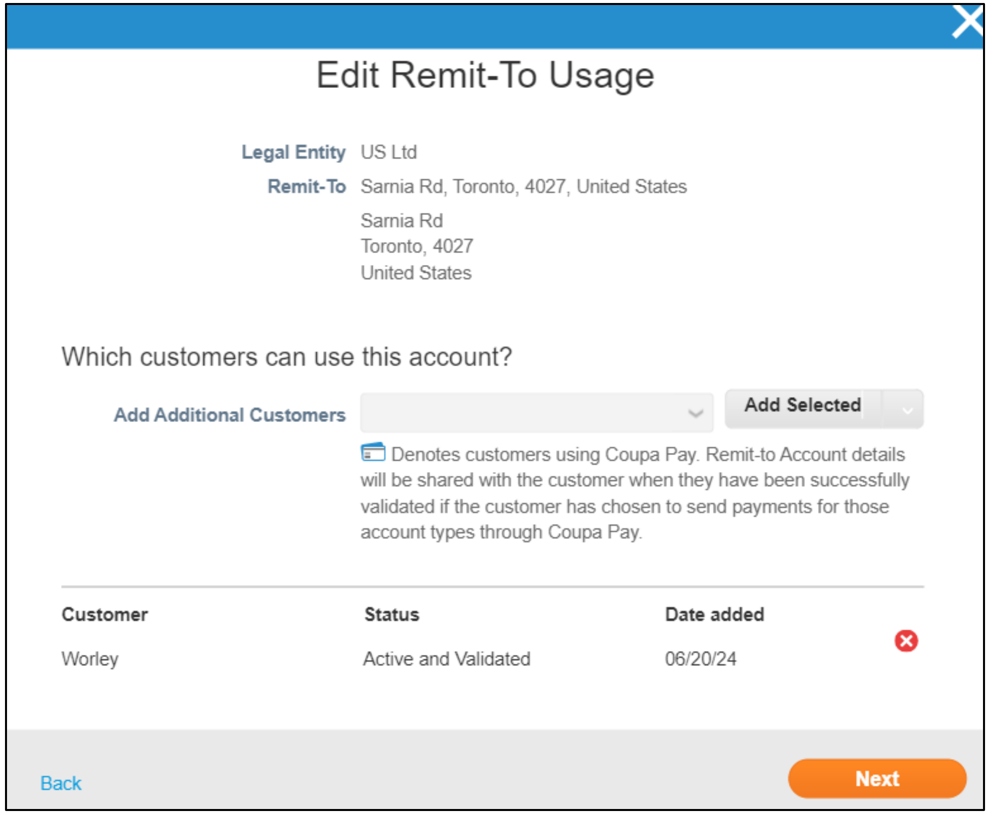


# Coupa Supplier Portal | Admin Setup

## E.3 Share a Remit-to with a Customer

1. Go to **Setup** > **Admin** > **Remit-To**.
2. In the Actions column, select **Share**.
3. On the Edit Remit-To Usage page that appears, select the customers you want to share the remit-to with from the Add Additional Customers dropdown list.



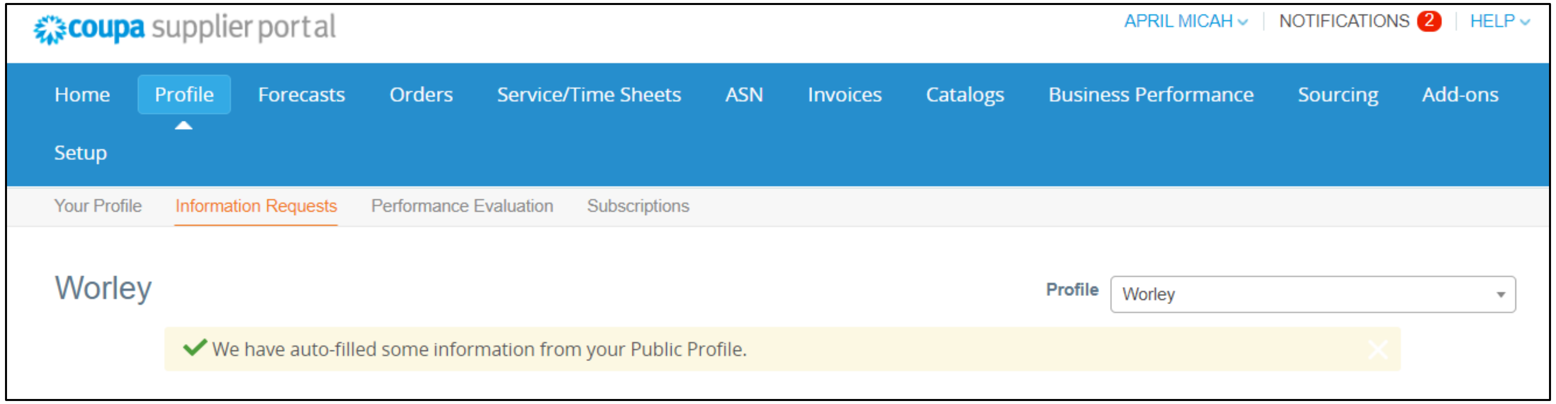



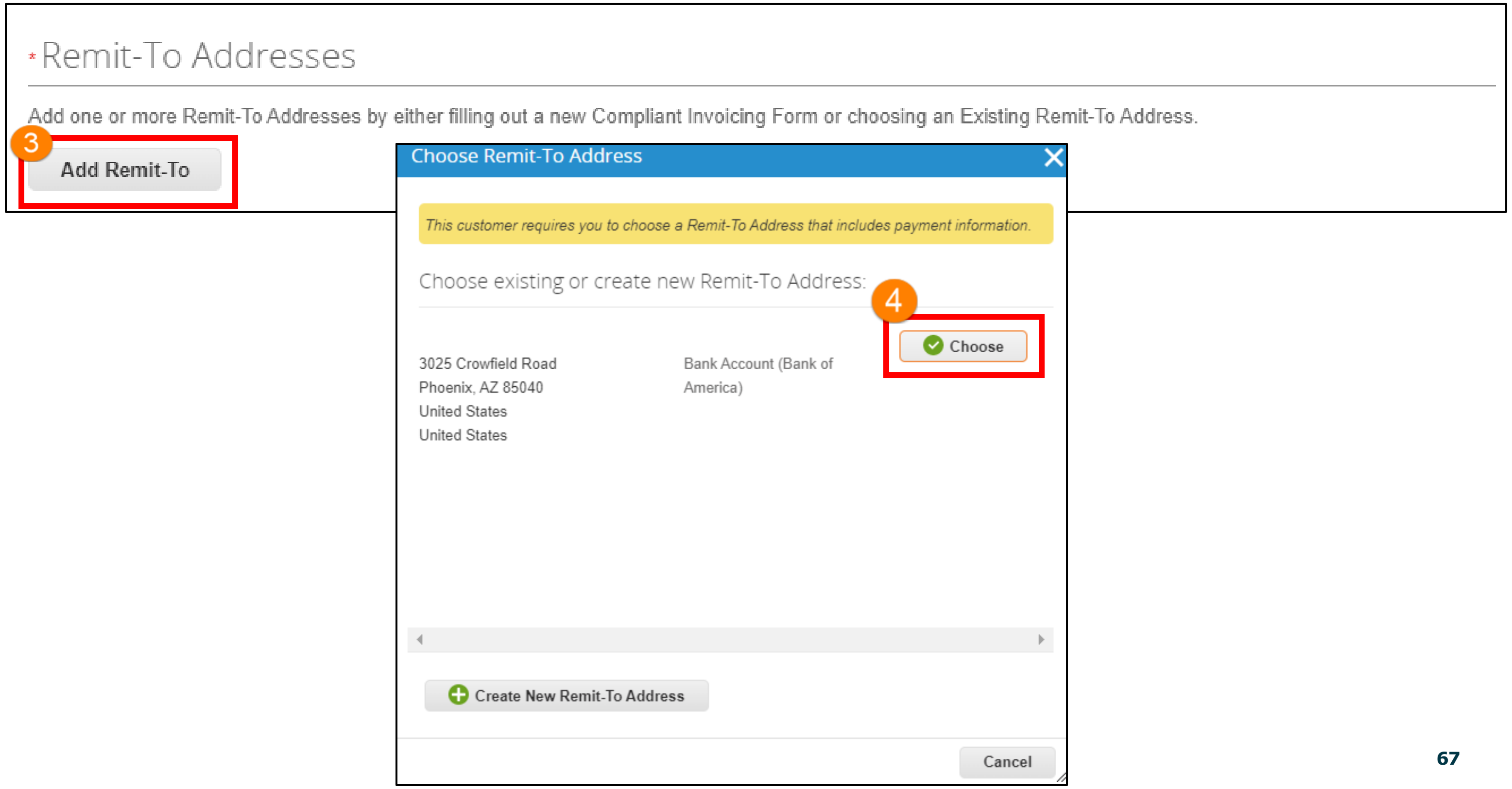
# Coupa Supplier Portal | Admin Setup

## E.4 Add Remit-to Addresses to SIM Request

- Customer might request you to add a remit-to address to the SIM Requests. You can create a new remit-to address or choose an existing one from the legal entities.

1. Go to **Profile** > **Information Requests**. You can also access Information Requests by clicking links in notifications.
2. Select your customer from the Profile dropdown menu.
3. If the Information Request includes Remit-To Addresses, select **Add Remit-To** to add a new or an existing remit-to address. You can add one or more remit-to addresses.
4. In the Choose Remit-To Address window, you can select **Choose** next to the existing addresses you want to send to your Customer, or you can select Create New Remit-To Address to add a new address.

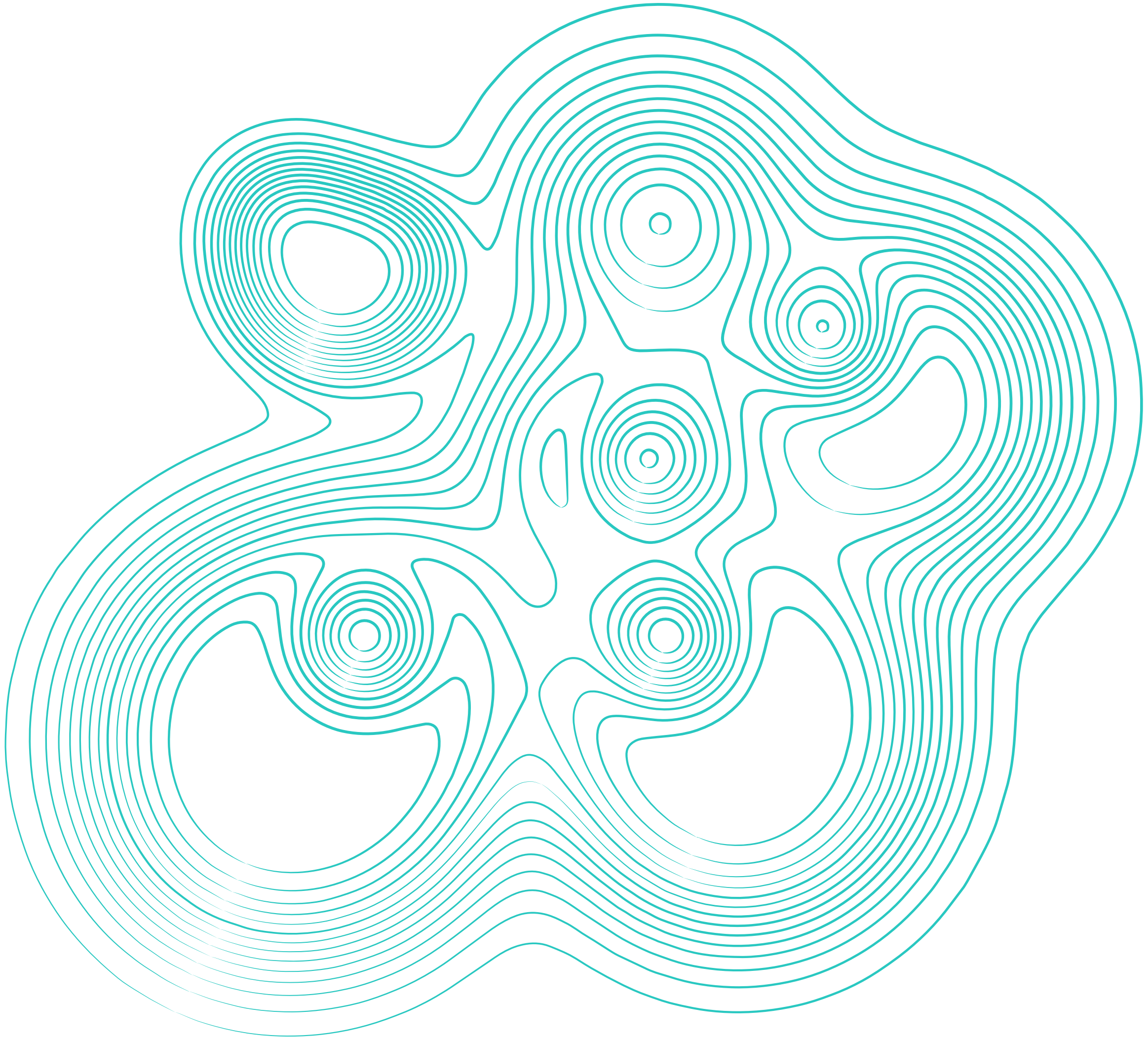


# Agenda

# Supplier's Guide to Coupa Sourcing Optimization

**Coupa Sourcing Optimization (#3)**



# Coupa Sourcing Optimization

Coupa Sourcing Optimization (CSO) is a strategic sourcing solution provided by Coupa, designed to streamline and optimize the procurement process for organizations.

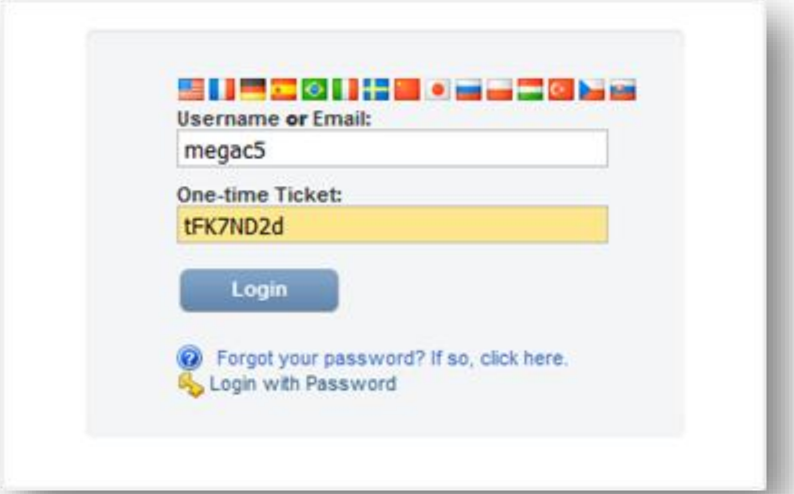
Coupa Sourcing Optimization (CSO) offers several benefits to suppliers that can enhance their experience and operational efficiency within the procurement process.

- ✓ Greater visibility into demand forecasts, market trends, and buyer requirements
- ✓ Direct interactions with buyers through the platform, leading to clearer expectations, faster responses to inquiries, and streamlined negotiations.
- ✓ Optimized pricing strategies
- ✓ Provides data-driven insights and analytics that aid in decision-making
- ✓ Simplified bidding process by providing a structured and transparent platform

# How to Login to CSO

**Go to the web address indicated in your login details and enter your username and your one-time password provided in the login ticket or invitation letter.**

1. Or just click the link in the e-mail and Login.
2. Note that the one-time ticket can be used only once. You may retrieve a new temporary one-time password by clicking the "Forgot your password?" link in the login page.

# How to Login to CSO

If it is the first time you visit CSO, after logging in you will be asked to change your password into one of your own choice.

The password must contain:

- ✓ At least 8 characters
- ✓ At least one digit
- ✓ At least one lower case letter
- ✓ At least one upper case letter

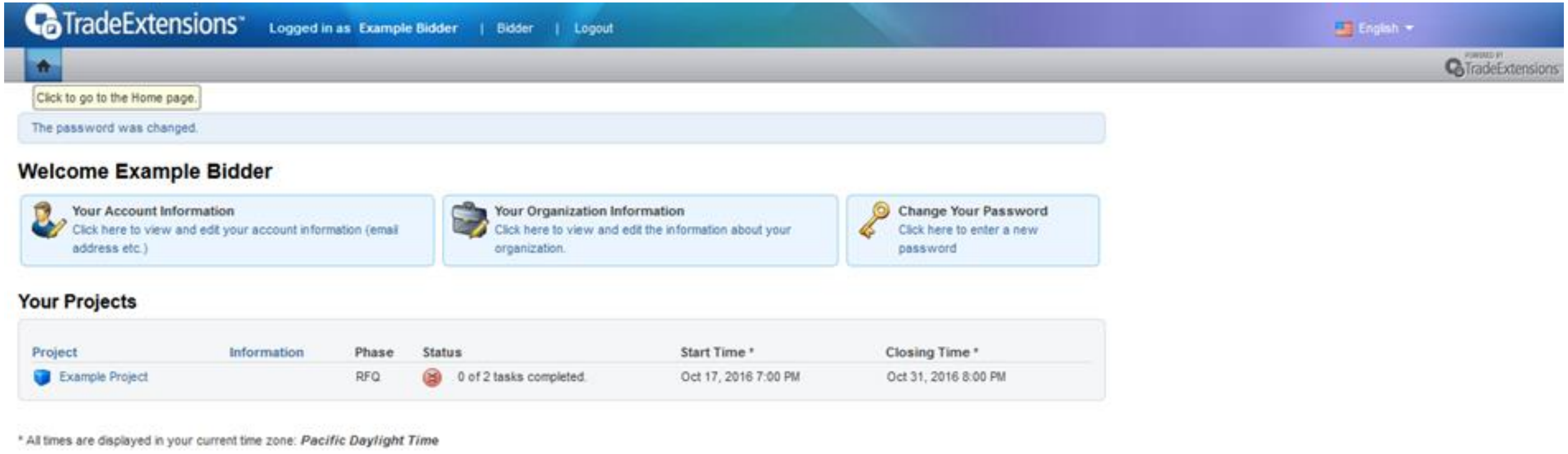
You will also be asked to review and update your personal contact information the first time you log in.

Please make sure phone numbers are correct in case event management should need to contact you.

Click the Save button to continue to the main page, do not click the Log out button.

# Start Page

This is your start page in CSO where you can see the events you are invited to and if you are required to do something at the moment.

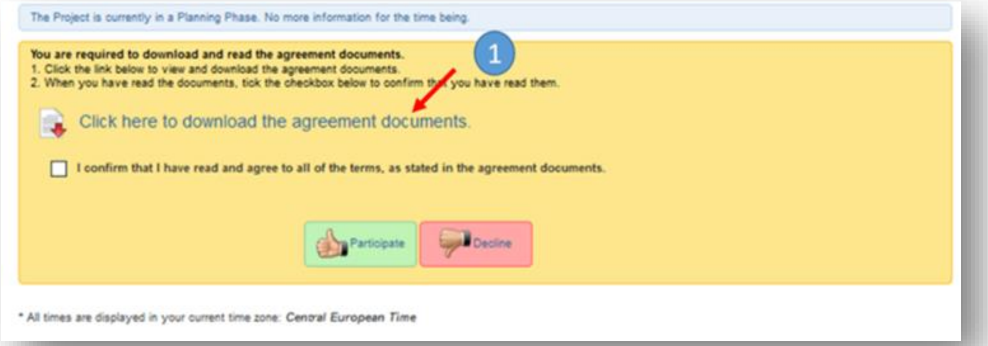


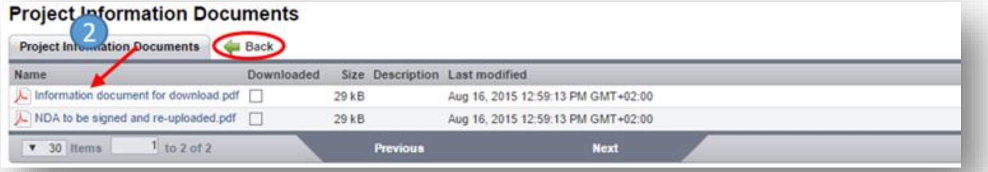
# Gating

You may be required to take part of some particular information prior to getting access to the event page in a gating step.

Clicking the event name in the start page will take you to the gating page. If there is no gating requirements for the event at hand, you will be taken directly to the Event Overview page.

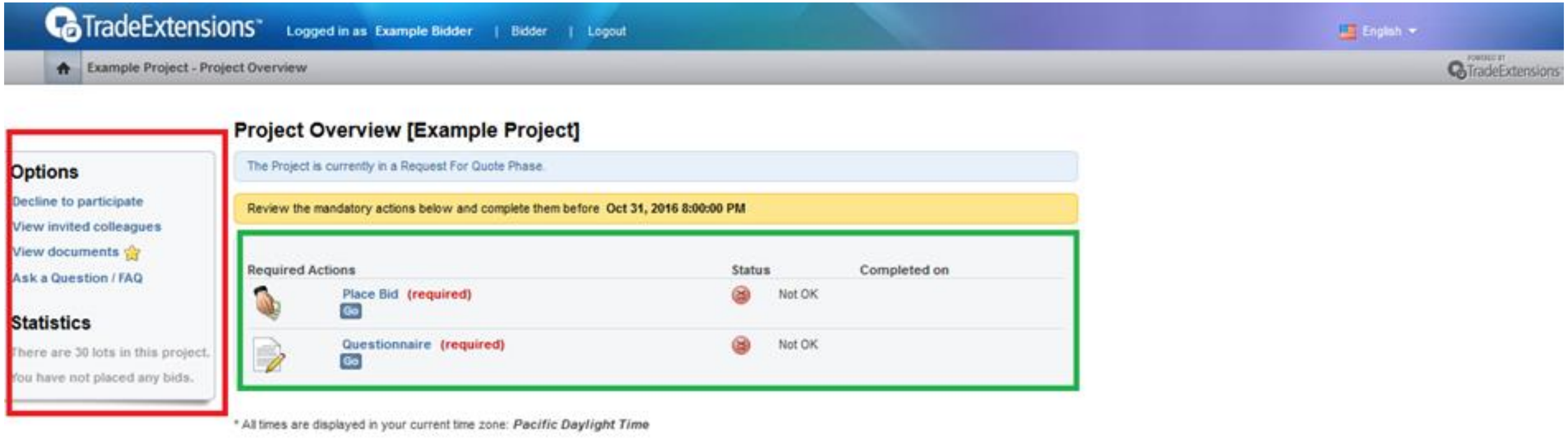
- Click the link to download the agreement documents and download all documents.
- Click the Back arrow.
- Check the box “I confirm that I have read…” and click the “Participate” button.
- Should you wish to decline participation, you will be asked to give a brief explanation.




# Event Overview Page

On the event overview page, you can see and access the various tasks you are required to fulfil at the time being. If the event is in an evaluation phase, i.e. you just have to wait, you will be informed about that as well.




The actions that are required from you are shown in the list (green box in the screen shot above). When the task is completed, the status is changed to OK with a happy smiley icon. Tasks that are not mandatory are marked as “Not yet completed” throughout the event.

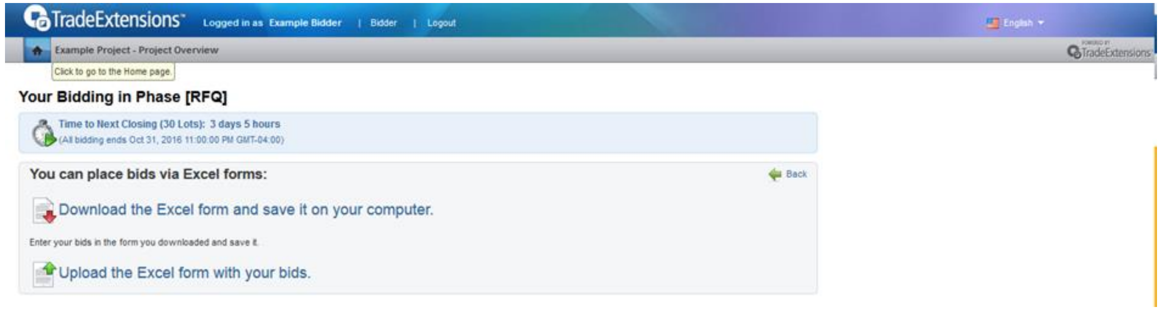
To enter a given task, click either the blue “Go” button or the name of the task, see next section.

In the top left corner of the event overview page (red box in the screen shot above), there are links for information and questions

# Request for Quote/Request for Information

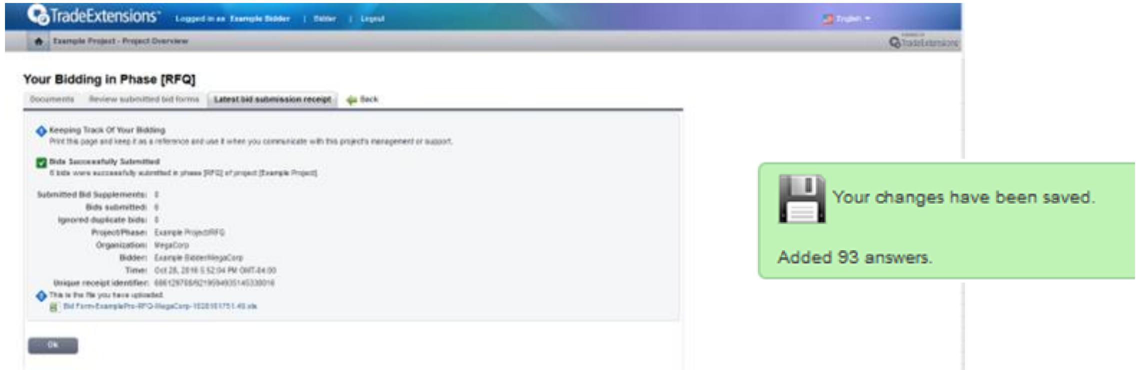
The procedure is the same for RFI Questionnaires as for RFQ Bid forms.

Click the link to the task in the event overview page, for instance ”Place bids” in the example above. Click “Download” and save the empty bid form or questionnaire on your computer.




Complete the requested information and make sure all mandatory questions have been answered. Save the completed form, go back to CSO and click the “Upload” link.

Browse for the saved questionnaire or bid form on your computer and click “Submit”. You will get a receipt that your answers have been properly submitted.

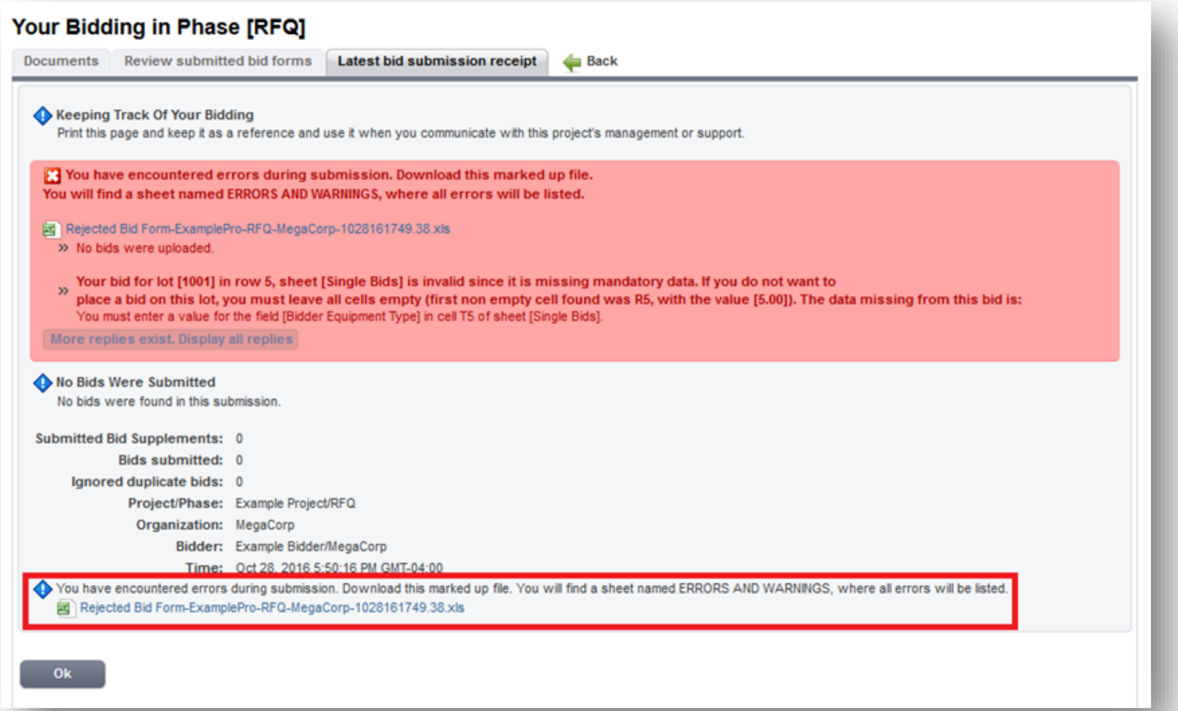



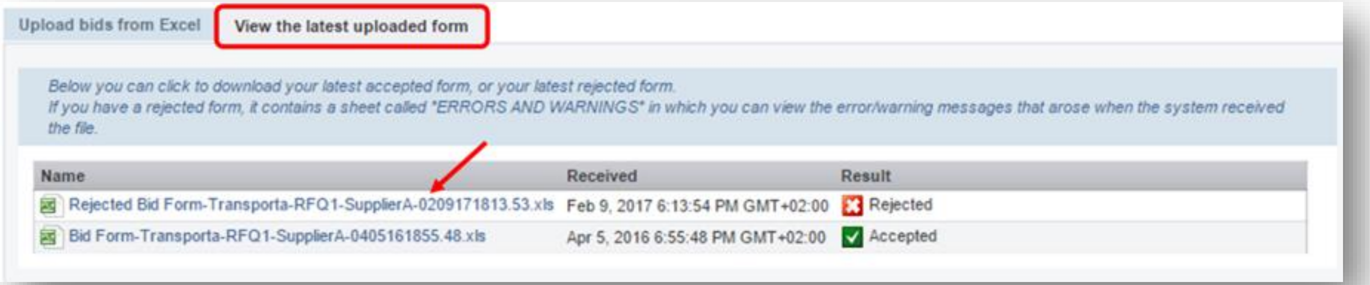
# Error Messages

If some mandatory information is missing or not correct, you will get an error message upon submission. The message will tell you which information is not accepted and why. In addition, the rejected form contains an additional sheet which lists the errors and points to the cells to be corrected.

The rejected form may be downloaded directly from the receipt page or from the "Upload" page.

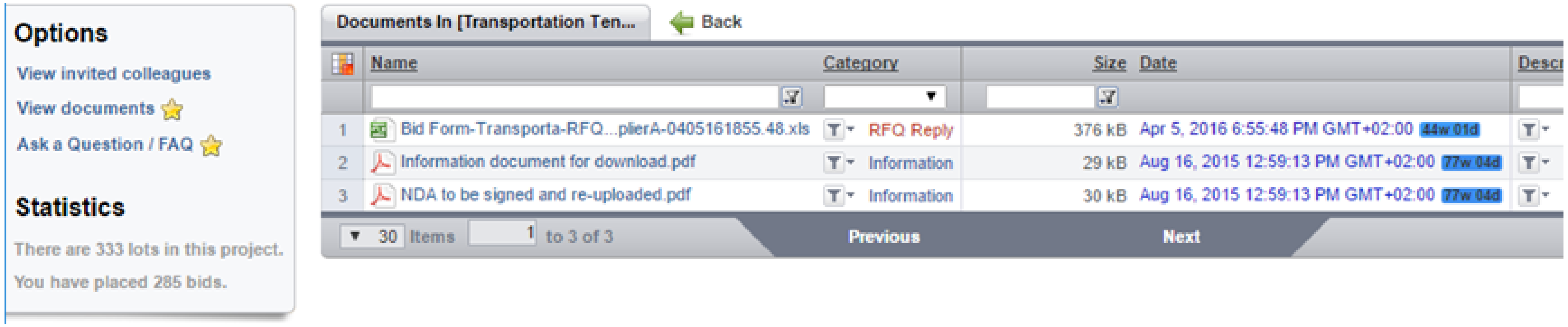
Review the error message(s) carefully, revise/complete the information, save the completed form and re-submit it as described above.



# View Documents

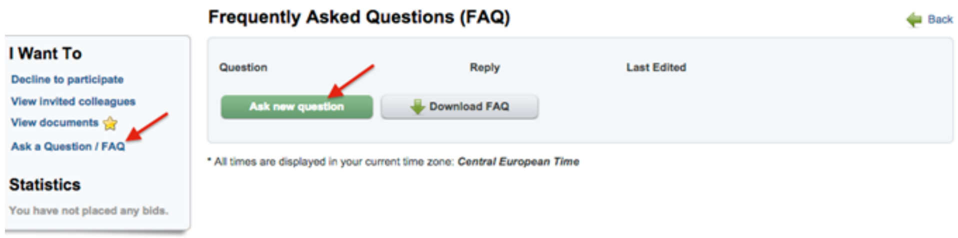
Here you can retrieve all documents provided for download as well as all the forms that you have submitted in the current phase. The star indicates if there are documents available that you have not yet downloaded (including your own submitted forms).

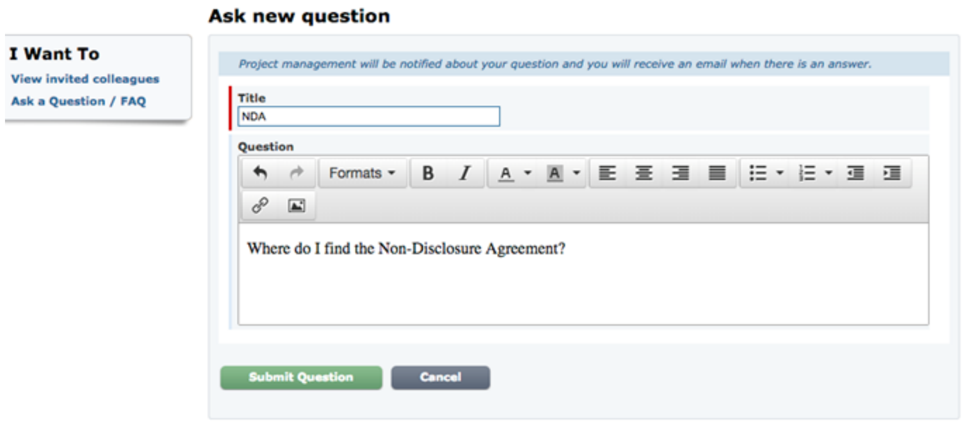



Use the Back arrow to get back to the event page.

# Ask a Question/FAQ

Here you can contact event support if you have any questions concerning the event. Click the green button "Ask new question", describe your question as carefully as possible in the editor window and click "Submit question".




The answer will appear next to your question on the "FAQ" page. Click the question name to see the answer or click the "Download FAQ" button to download all questions and answers in an Excel file.