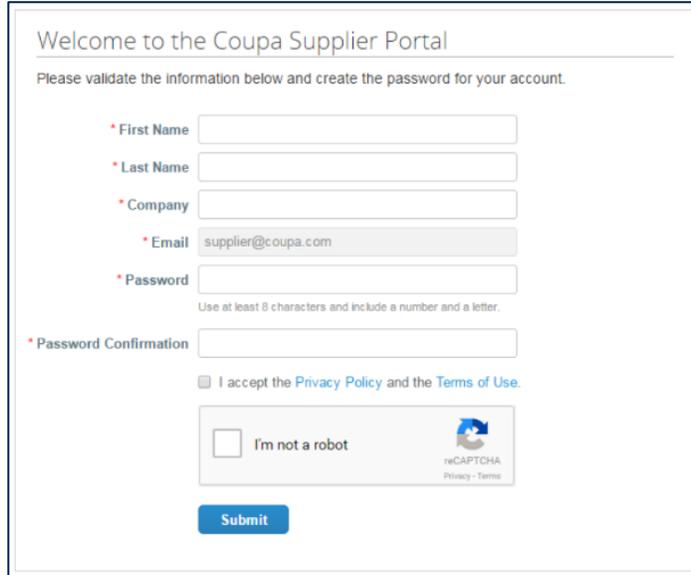


Supplier Training Guide

Coupa Supplier Portal (CSP)

My Account Management

After following the link from the Coupa invitation email sent from Apogee Enterprises, fill in the mandatory fields to provide basic information for your account and our company's public profile.



Setting	Description
*First Name	Your personal first name to be applied to your personal account.
*Last Name	Your personal last name to be applied to your personal account.
*Company	The name of your company as seen on your company's public profile.
*Email	This field cannot be changed. If you want to change your email address, you have to create a different CSP account using the new email address. If you want to use this email, create two company accounts and merge them
*Password	Use this field to create your password. It must be at least 8 characters long, and it has to include a number and a letter.

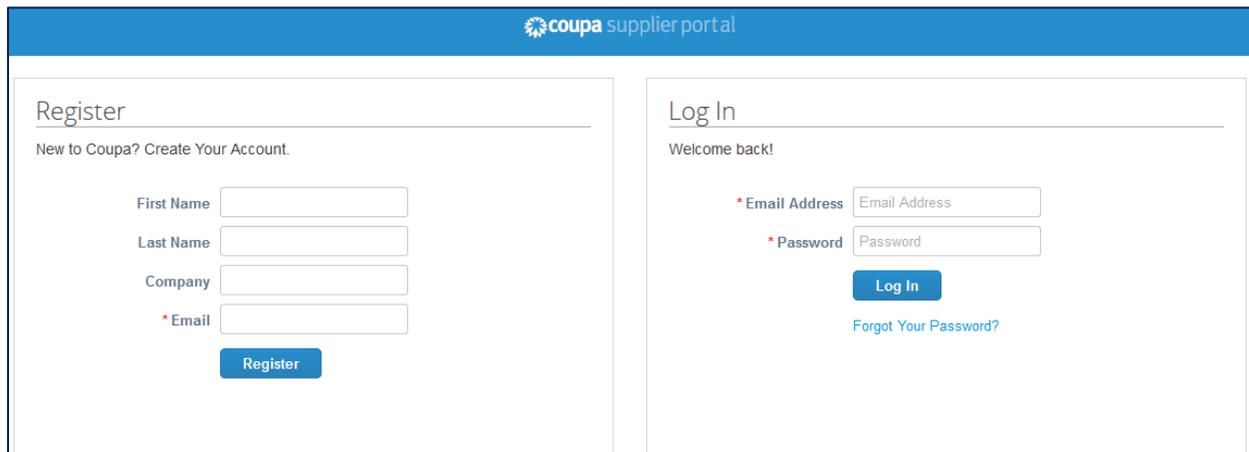
To create a CSP account, you must also accept the Privacy Policy and the Terms of Use. By default, this account is the admin account for your company. **Once set up, you should add other users and assign them roles, including account administration.**

Once you create your account and sign in, Coupa takes you on a tour of the new site.



Logging in to the CSP

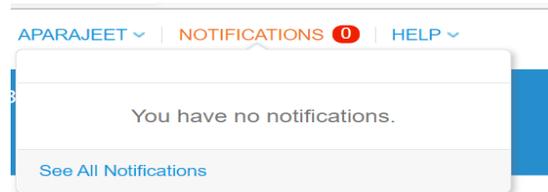
Go to <https://supplier.coupahost.com/> and in the Log In pane on the right, enter your email address and password and click Log In.



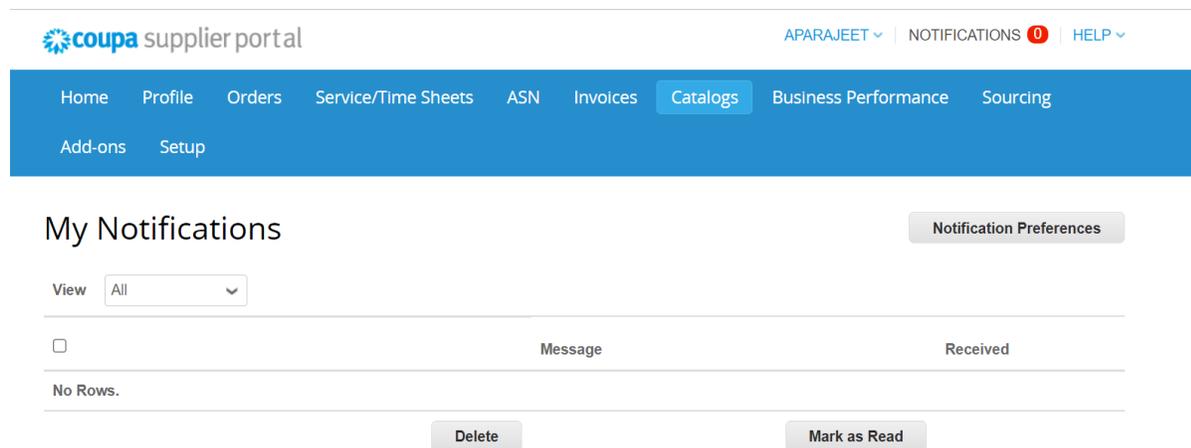
coupa supplier portal	
<h3>Register</h3> <p>New to Coupa? Create Your Account.</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Company <input type="text"/></p> <p>* Email <input type="text"/></p> <p><input type="button" value="Register"/></p>	<h3>Log In</h3> <p>Welcome back!</p> <p>* Email Address <input type="text"/></p> <p>* Password <input type="password"/></p> <p><input type="button" value="Log In"/></p> <p>Forgot Your Password?</p>

How to set or modify Notifications

In the top right of your window, hover over the Notifications link to see your unread system notifications.

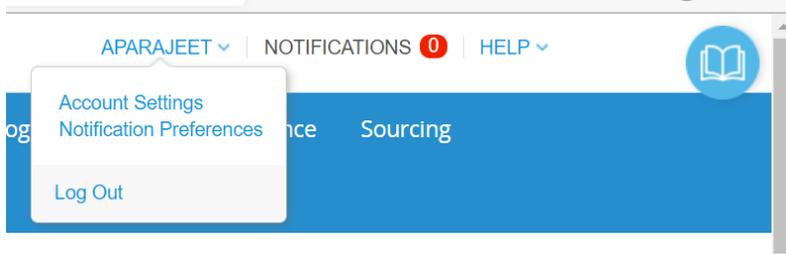


To view details of your notifications and manage them, click on the Notifications link.



On the My Notifications page, you can view all of your (read and unread) notifications or you can filter by category (FYI, To Do, or Unread). In addition, you can select and delete them all or one-by-one.

To change your notification preferences, hover over your name in the top right and click on the Notification Preferences button. When you begin your introduction to Coupa, we advise that you enable all of your notifications until you are more familiar with the system.



On the My Account Notification Preferences page, review each section and select the checkboxes for the items that you want to receive any or all of the notification types: online (to do list) or email.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

- Settings
- Notification Preferences

Catalogs

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

Form Responses

A form response is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
A form response is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
Supplier information is updated	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

Invoices

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
An invoice is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
An invoice is paid	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

Orders

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
A new order is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

Profile

Public profile is updated	<input type="checkbox"/> Online	<input type="checkbox"/> Email
An information update request is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

Terms of Use

New Terms of Use are received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
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Users

A new customer connection is created	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
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Service/Time Sheets

A Service/Time Sheet is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email
A Service/Time Sheet is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email

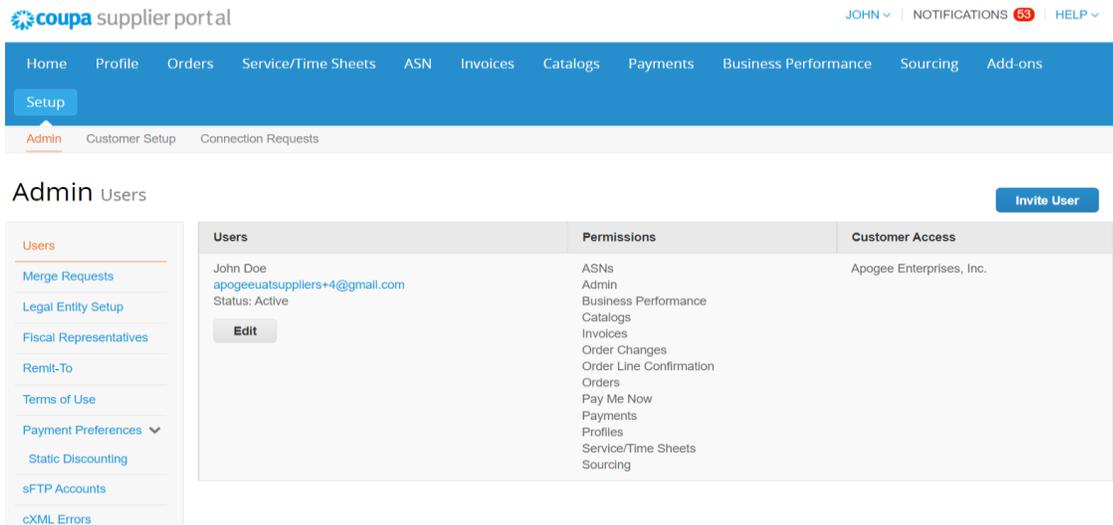
Cancel
Save

NOTE: If you have an SMS-capable device and you validate your phone number, you can also choose to receive notifications as short text messages via SMS.

How to invite, add or deactivate Users

Note: It is recommended to set up at least 2-3 contacts as account Admins in the event of an absence or departure.

From the Admin tab in the top ribbon of your window, you can manage user permissions and Apogee Enterprises access by assigning certain users to certain customers, by limiting what types of documents they can access, and selecting what functions, they can perform with their assigned customers.



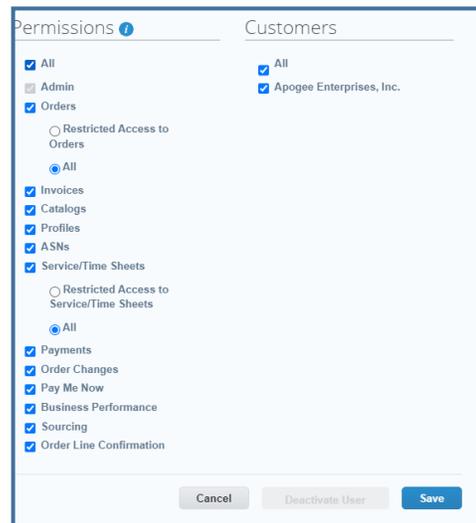
The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' tab is active, with sub-tabs for 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin Users' section is displayed, showing a table with columns for 'Users', 'Permissions', and 'Customer Access'. A table entry for 'John Doe' is visible, with an 'Edit' button. A sidebar on the left contains various setup options like 'Merge Requests', 'Legal Entity Setup', and 'Payment Preferences'. An 'Invite User' button is located in the top right corner of the table area.

From the top ribbon, find the Admin tab and then select the Users section on the left of your screen. The Admin Users page appears after clicking this option.

Click on the Edit button to open the Edit user access for [User Name] window.



The screenshot shows the 'Edit user access for SupplierName' window. It has a title bar with a close button. Below the title is a 'User info' section with three input fields: 'First Name' (containing 'First'), 'Last Name' (containing 'Last'), and 'Email' (containing 'first.last@supplier.com').



The screenshot shows the 'Permissions' and 'Customers' configuration window. It has two tabs: 'Permissions' and 'Customers'. The 'Permissions' tab is active, showing a list of permissions with checkboxes. The 'Customers' tab is also active, showing a list of customers with checkboxes. The 'All' option is selected for both. At the bottom, there are 'Cancel', 'Deactivate User', and 'Save' buttons.

NOTE: User permissions with an asterisk (*) are applicable to Apogee Enterprises specifically.

You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

You cannot change the user's email address. If a user wants to change the email address, you must send a new invitation to that user. To invite a new user, find the Invite User icon in the top right corner of the User page.

The Invite User and Edit user access for [User Name] windows are almost identical, but when you invite a user, you can specify an email address.

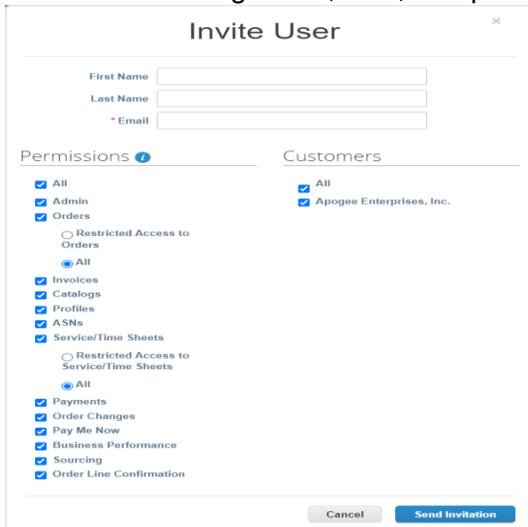
User Permissions	Descriptions
All	Gives full access to all CSP functions, except for user administration.
Admin	Has full access to all CSP functions, including user administration. Non-admin users can still view the Users tab of the Admin page and invite users, but they cannot edit existing users. The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
*Orders	Allows viewing and managing purchase orders (POs) received from customers.
Restricted Access to Orders	Allows accessing POs and PO changes. The permission is off by default.
Restricted Access to Service / Time Sheets	Allows accessing service/time sheets. The permission is off by default.
*Invoices	Allows creating and sending invoices to customers.
*Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
*ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.
*Payments	Allows viewing payments and downloading digital checks.
Order Changes	Allows submitting PO change requests.
Pay Me Now	Available only if your customers use Coupa Pay and enabled the feature related to this permission.

Inviting Users

Invite User

Users	Permissions	Customer Access
John Doe apogeeuatsuppliers+4@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Apogee Enterprises, Inc.

Coupa allows for new users to be invited to the CSP by clicking the **Invite User** button on the Admin Tab. A window will appear that prompts the user to input identifying information for the new user including name, mail, and permissions.



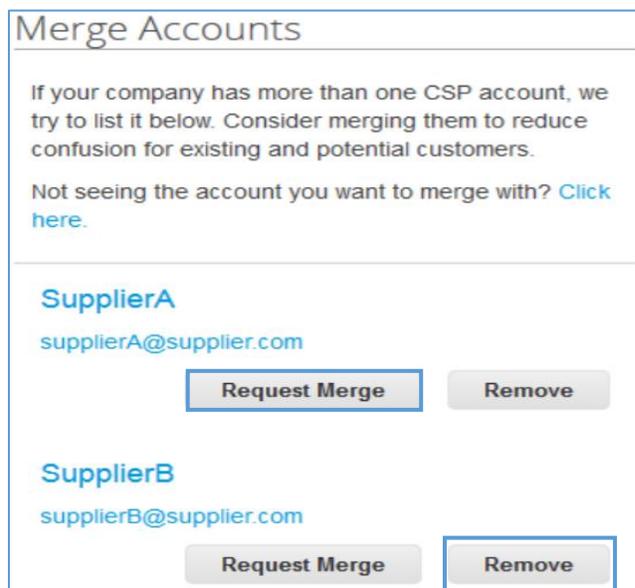
Coupa does not allow users to be deleted, so you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

If you deactivate users, you can always reactivate them later. If you reactivate a user, the customer access is reset for that user, so you will have to assign customers to that user again.

Merging Accounts

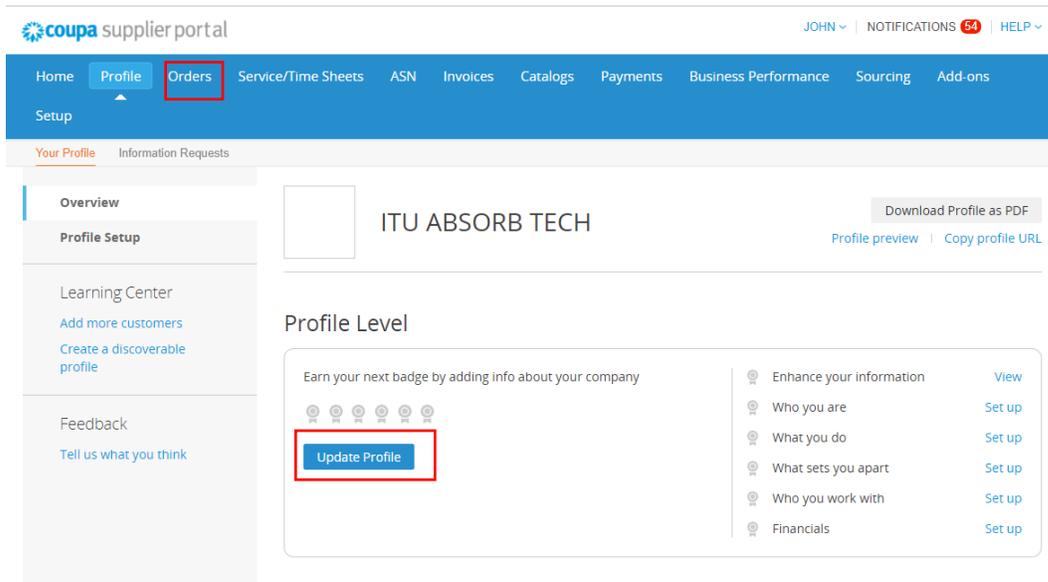
Merge request appears in the right-hand on the **Home** page

- Click **Request Merge** to merge the accounts
- Click **Remove** to remove the request

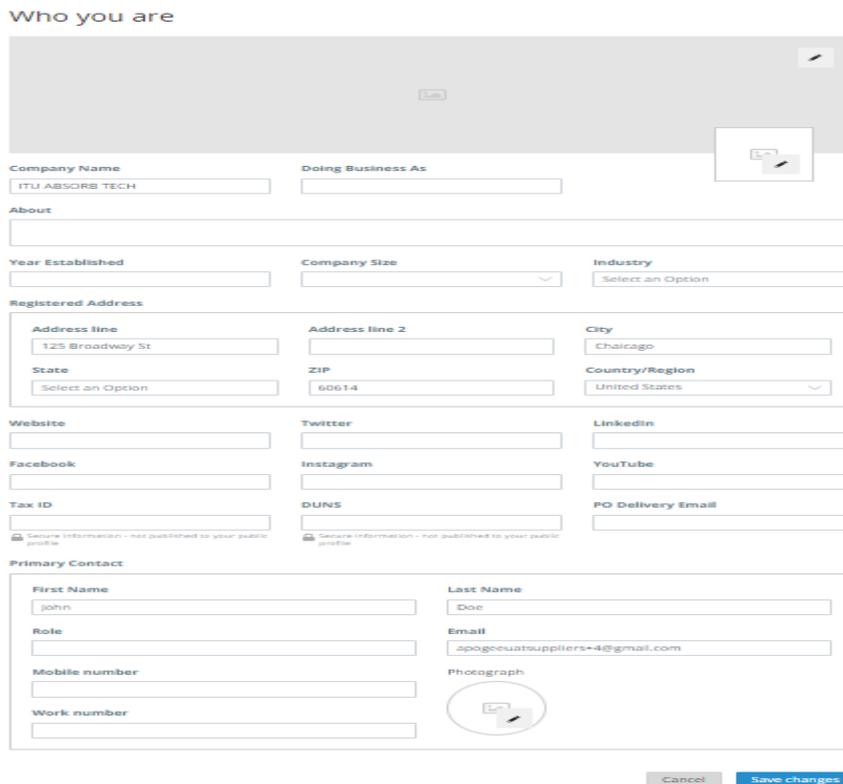


Create or Update the Supplier Profile

Below is the **Profile** section/tab of the Coupa Supplier Portal. You will use this section to fill out additional company information.



Populate your company profile with all relevant company information Using **Update Profile**

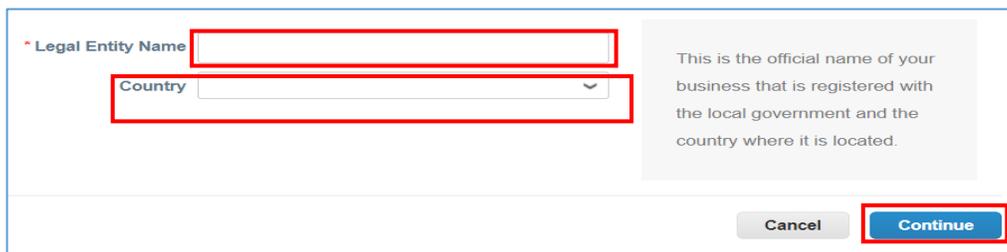
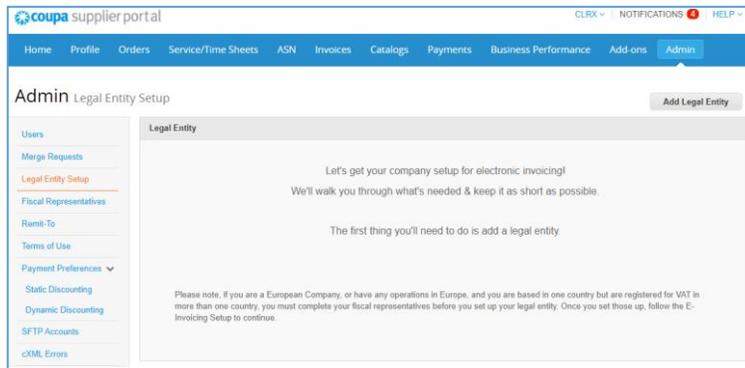


The screenshot shows the 'Who you are' profile update form. The form is divided into several sections: 'Company Name' (ITU ABSORB TECH), 'Doing Business As', 'About', 'Year Established', 'Company Size', 'Industry', 'Registered Address' (Address line 1: 125 Broadway St, Address line 2, City: Chicago, State, ZIP: 60614, Country/Region: United States), 'Website', 'Twitter', 'LinkedIn', 'Facebook', 'Instagram', 'YouTube', 'Tax ID', 'DUNS', 'PO Delivery Email', and 'Primary Contact' (First Name: john, Last Name: Doe, Role, Email: apogeeuatsuppliers+4@gmail.com, Mobile number, Work number, Photograph). The form includes 'Cancel' and 'Save changes' buttons at the bottom.

Legal Entity Setup

You need to add Legal Entity information as well as Remit-To and Ship-From Addresses to enable E-Invoicing

- Click Admin tab from the top menu bar then select **Legal Entity Setup** from the menu on the left
- Click Add Legal Entity
- Enter your Legal Entity information
- Click Continue



The screenshot shows the 'Legal Entity Setup' form. The 'Legal Entity Name' and 'Country' fields are highlighted with red boxes. The 'Continue' button is also highlighted with a red box. A grey box on the right provides instructions: 'This is the official name of your business that is registered with the local government and the country where it is located.'