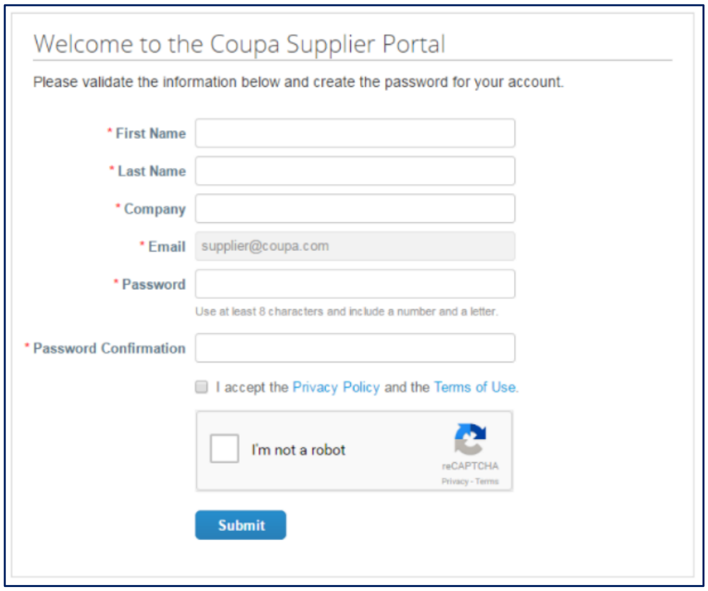
Supplier Training Guide

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.



Welcome to the Coupa Supplier Portal

Please validate the information below and create the password for your account.

* First Name
* Last Name
* Company
* Email supplier@coupa.com
* Password
Use at least 8 characters and include a number and a letter.
* Password Confirmation

I accept the Privacy Policy and the Terms of Use.

I'm not a robot
reCAPTCHA
Privacy - Terms

Submit

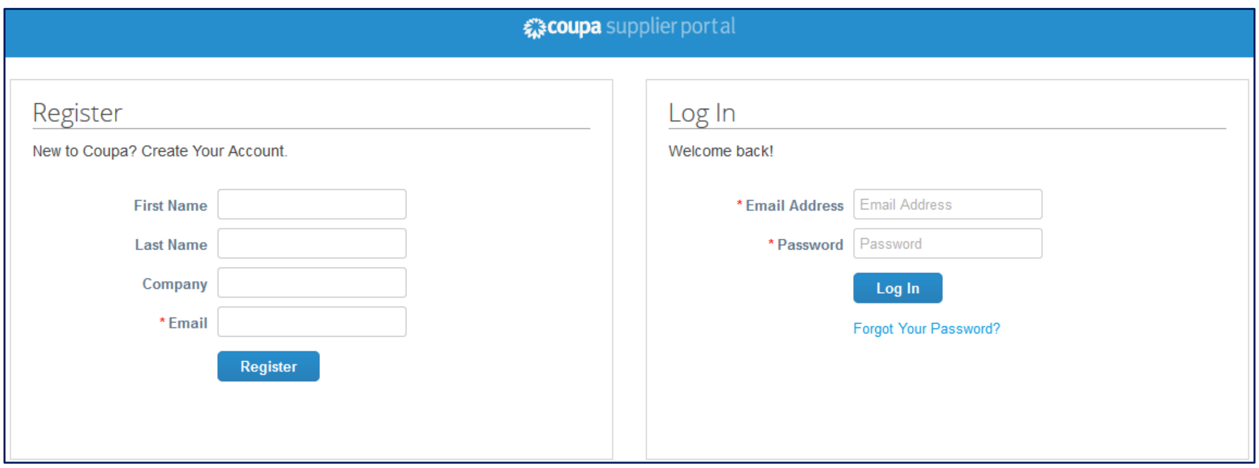
Setting	Description
***First Name**	Your personal first name to be applied to your personal account.
***Last Name**	Your personal last name to be applied to your personal account.
***Company**	The name of your company as seen on your company's public profile.
***Email**	This field cannot be changed. 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.

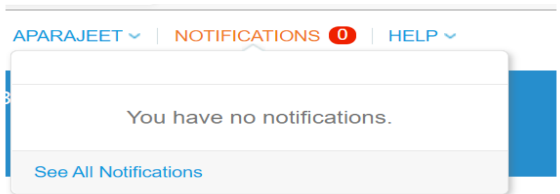
Logging in to the CSP

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.

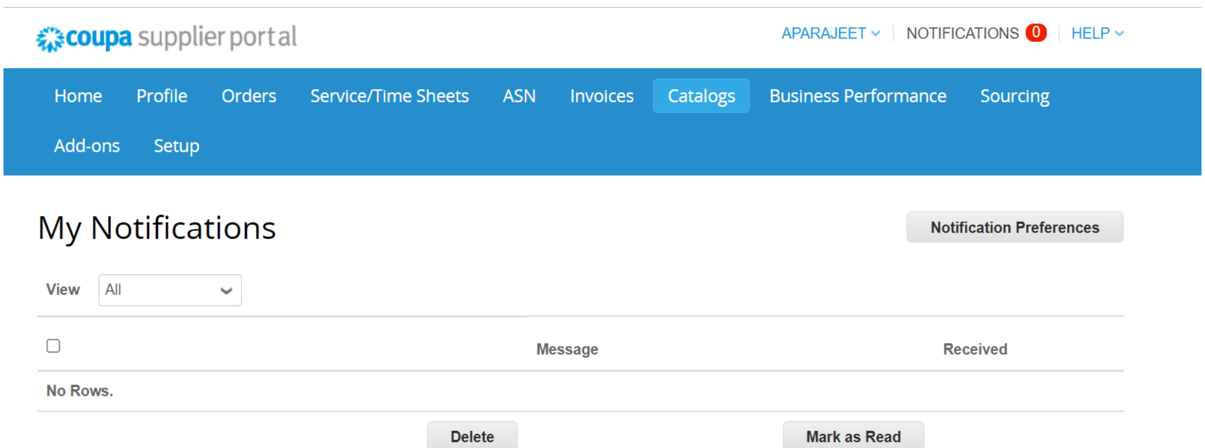


How to set or modify Notifications

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

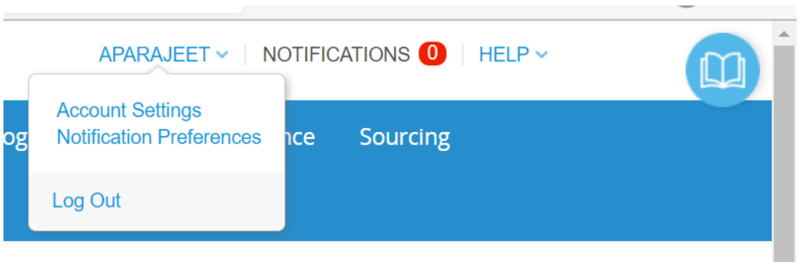


To view details of your notifications and manage them, click on the Notifications link.

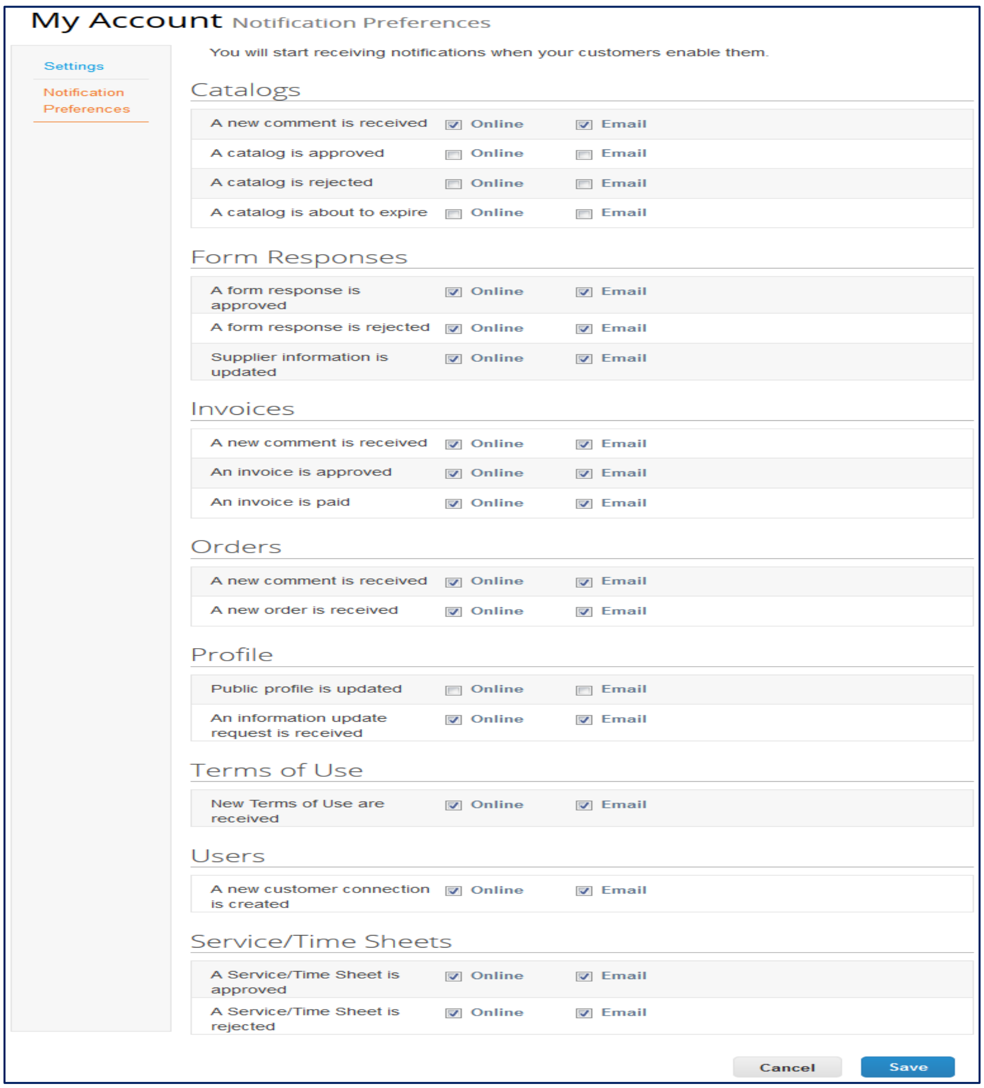


On the My Notifications page, you can view all of your (read and unread) notifications or you can filter by category (FYI, To Do, or Unread). In addition, you can select and delete them all or one-by-one.

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.

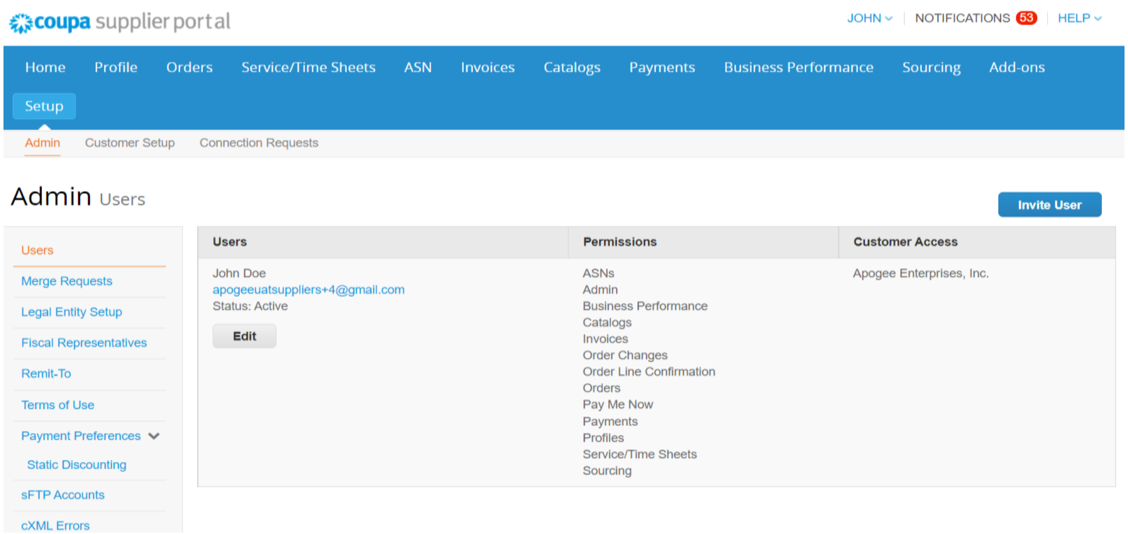


NOTE: If you have an SMS-capable device and you validate your phone number, you can also choose to receive notifications as short text messages via SMS.

How to invite, add or deactivate Users

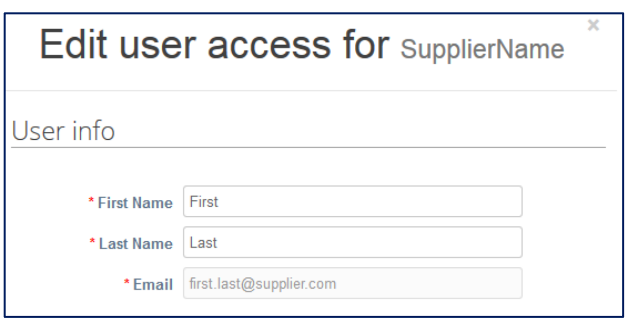
Note: It is recommended to set up at least 2-3 contacts as account Admins in the event of an absence or departure.

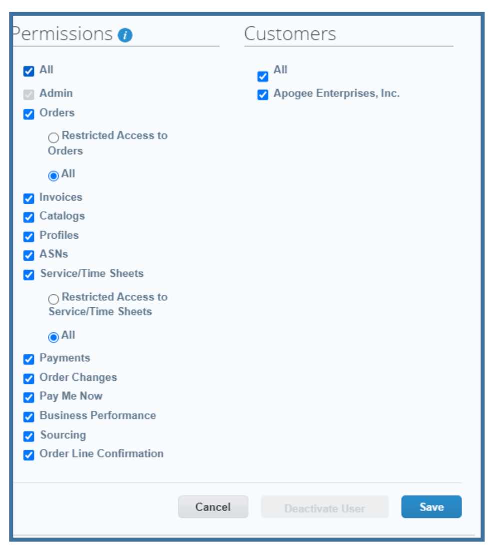
From the Admin tab in the top ribbon of your window, you can manage user permissions and Apogee Enterprises access by assigning certain users to certain customers, by limiting what types of documents they can access, and selecting what functions, they can perform with their assigned customers.



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.





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

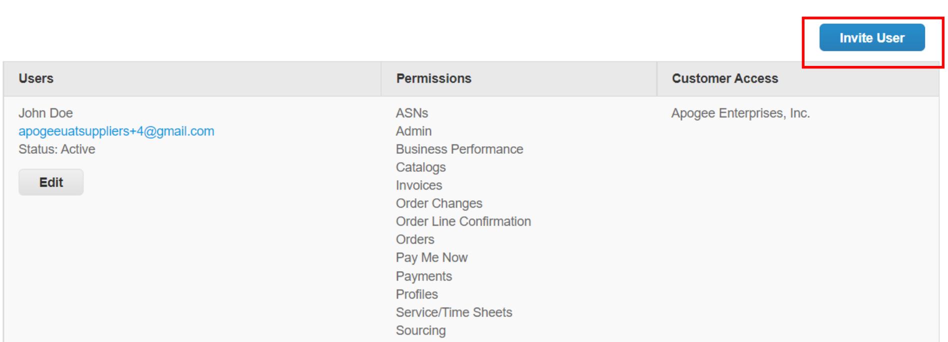
You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

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.

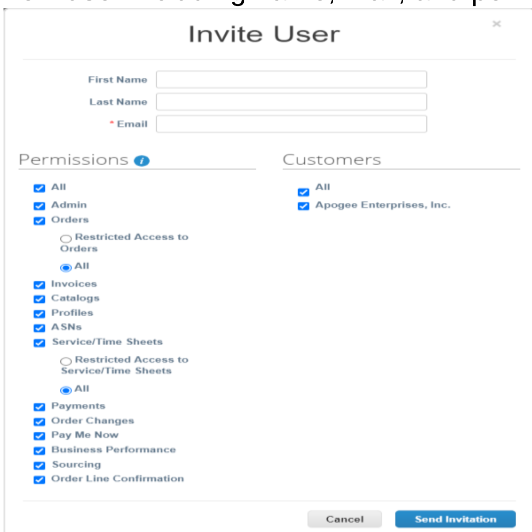
The Invite User and Edit user access for [User Name] windows are almost identical, but when you invite a user, you can specify an email address.

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



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



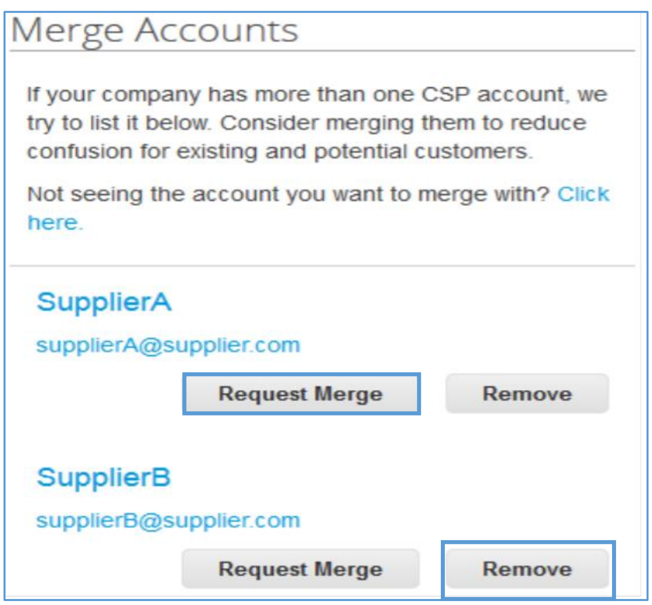
Coupa does not allow users to be deleted, so you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

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

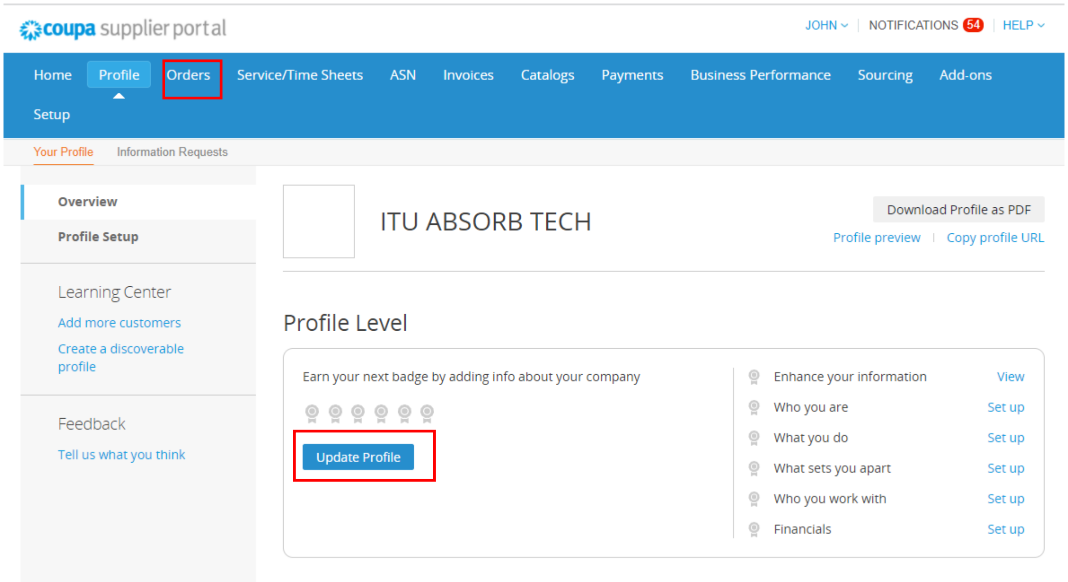
Merge request appears in the right-hand on the **Home** page

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

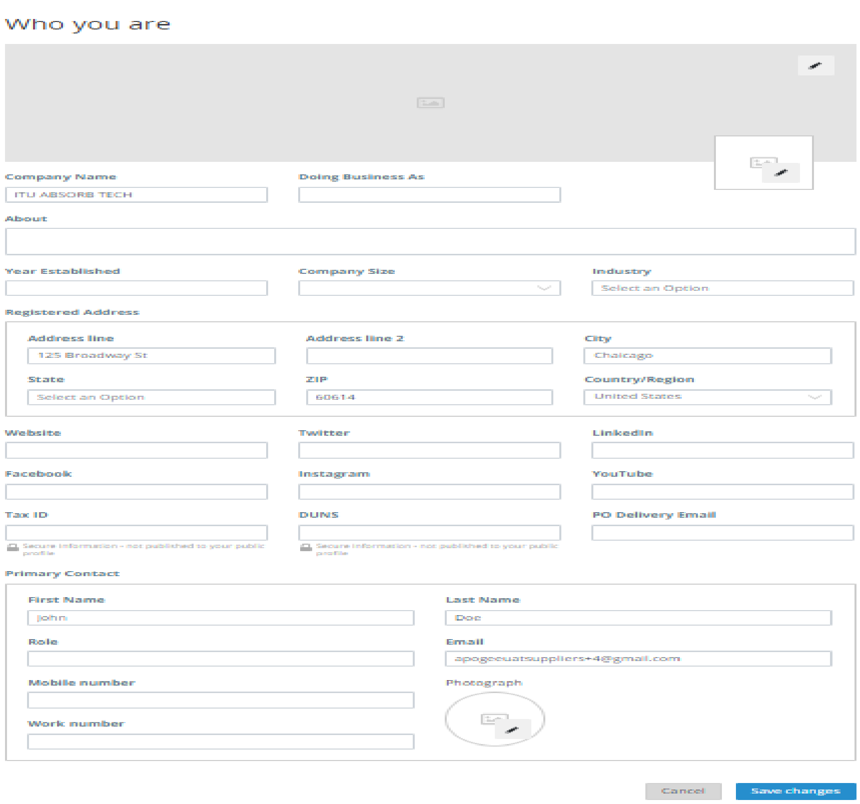


Create or Update the Supplier Profile

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**



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