Coupa Supplier Portal Training

Cabot Corporation

Agenda

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Introduction to Coupa

Cabot CSP Supplier Training

What is Coupa?

Coupa is a user-friendly e-Procurement and supplier collaboration cloud-based software. As our partner, you stand to benefit by gaining access to a zero-cost supplier portal that provides enhanced visibility, better control, fewer mistakes and faster payments via an intuitive user interface.

The Coupa Supplier Portal enables you to:

- View and acknowledge Purchase Orders/Change Orders
- Submit invoices and monitor payment status
- Create catalogs
- Participate in sourcing events
- Manage your contact/remittance information

How will you benefit?

By working with Cabot electronically, you will increase your order-taking efficiency, invoice creation, reduce mistakes and delays fulfilling orders and maintain a better presence with Cabot users.

Benefits include, but are not limited to:

- Efficient Purchase Order receiving and acknowledgement
- Efficient invoice processing
- Direct PO-backed invoice creation
- Automated accurate routing of invoices to proper branches
- Instant visibility to Purchase Order, Timesheet, Invoice, Payment Information and catalog processing status as well as Cabot user contact details
- Reduced or even eliminated manual paper transaction processing
- Strong reporting capabilities

SAN vs CSP

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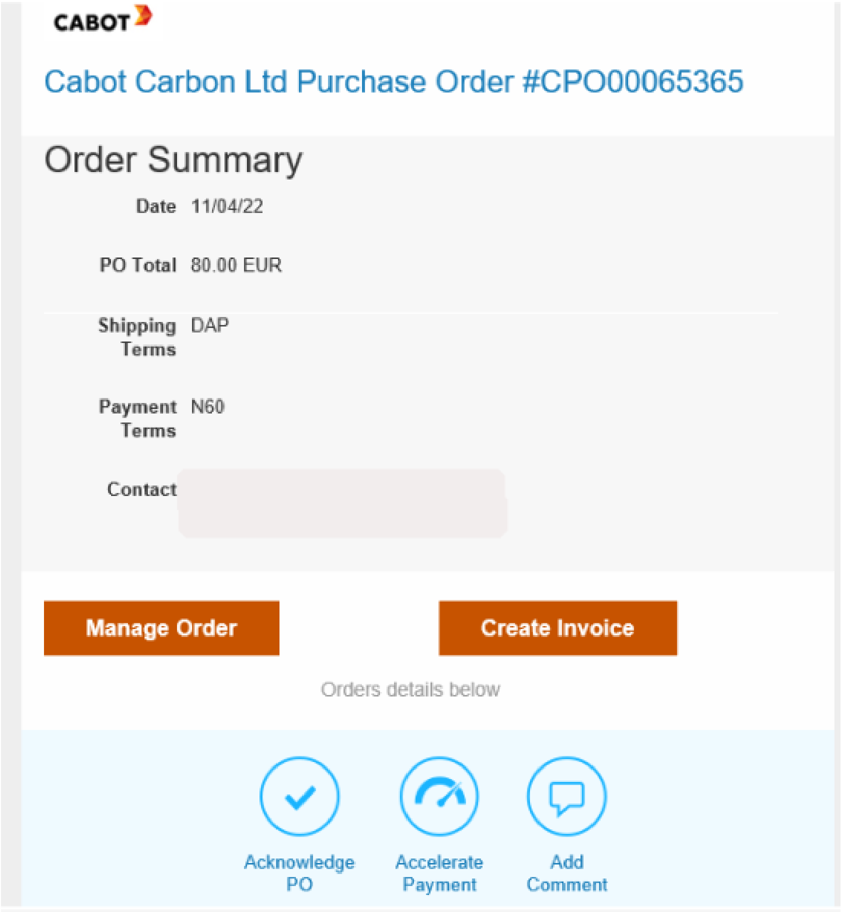
Supplier Actionable Notifications

Supplier Actionable Notifications (SAN) will allow you to create an invoice, acknowledge, or comment on a PO directly from a PO email. To have SAN enabled, your default PO method must be set to email and Cabot must enable SAN on your supplier record.

When creating an invoice from SAN, you will be brought to a landing page that looks similar to the landing page in the Coupa Supplier Portal, however the access is very limited and will not carry any invoice or PO history and not allow for any reporting.



CSP Supplier Profile and Account Setup

Cabot CSP Supplier Training

Connecting to Cabot via Coupa

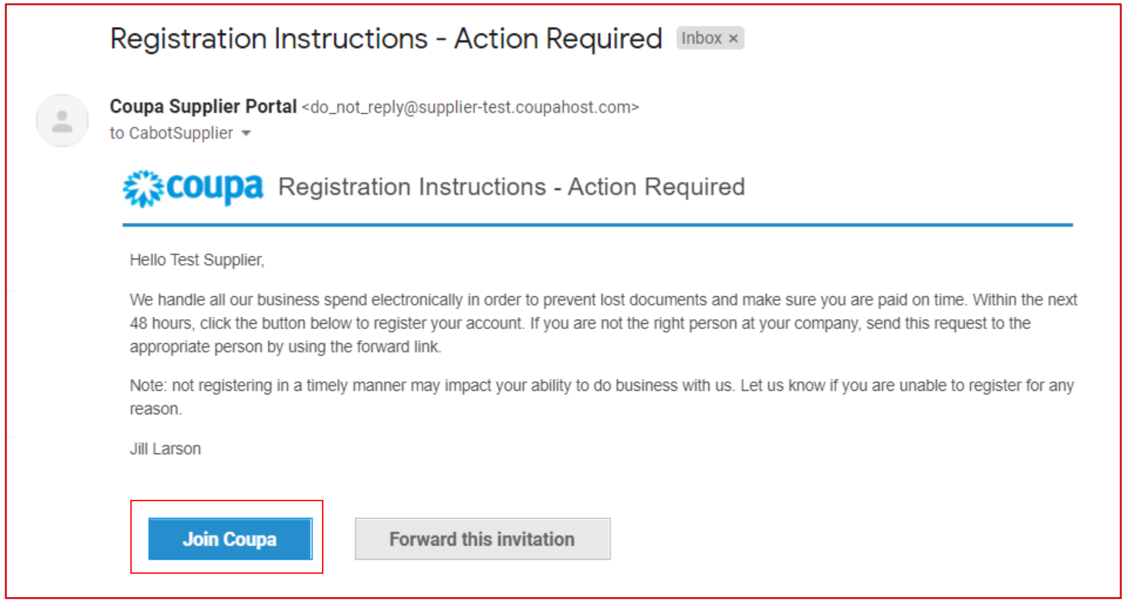
It is vital that all suppliers connect to the Coupa platform to transact with Cabot successfully.

Below is the initial e-mail invite (from Cabot) to set up your Coupa Supplier Portal account to transact with Cabot on Coupa. (email sent from)

After Cabot sends you an invitation to join the Coupa Supplier Portal (CSP), check the email address inbox which the invite was sent to and click on the link to confirm their request to interact with you as a supplier on Coupa.

By confirming this link and selecting "**Join and Respond**" you will be creating a new login on the Coupa Supplier Portal to receive Purchase Orders (POs) and send Invoices to Cabot.

If the invite was sent to the incorrect person at your company, inform your Cabot contact or contact Cabot at supplier.communication@cabotcorp.com.

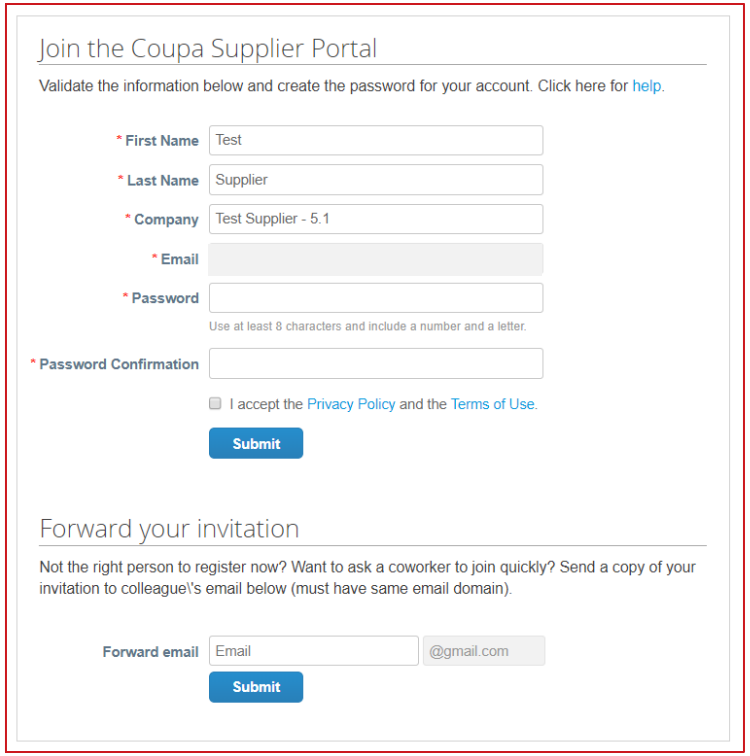


NOTE: Ensure Cabot has the correct email contact for your company

Connecting to Cabot via Coupa

- Fill out your information on the Coupa Supplier Portal to create a new account
- Review and accept the Privacy Policy and Terms of Use
- Click ‘Submit’

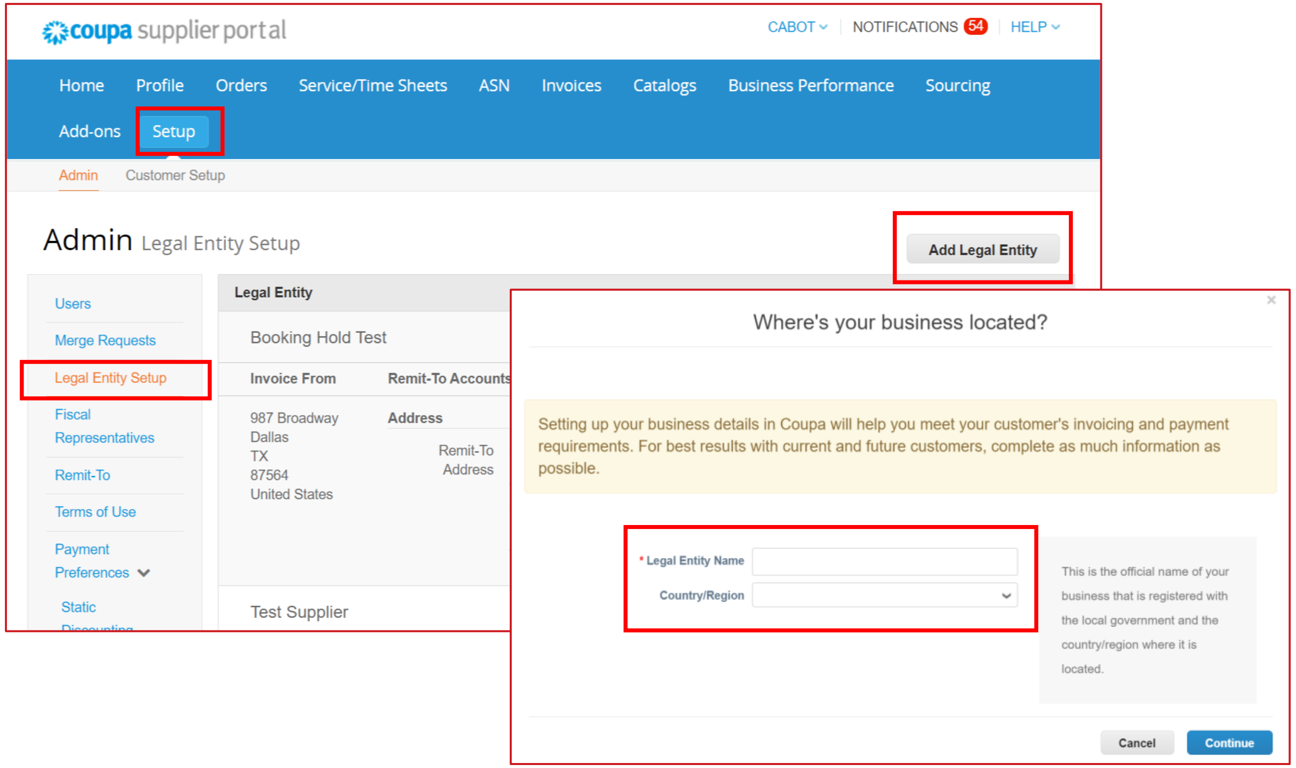
At this step, you will also have the option to forward the invitation to another employee at your company



Enabling E-Invoicing

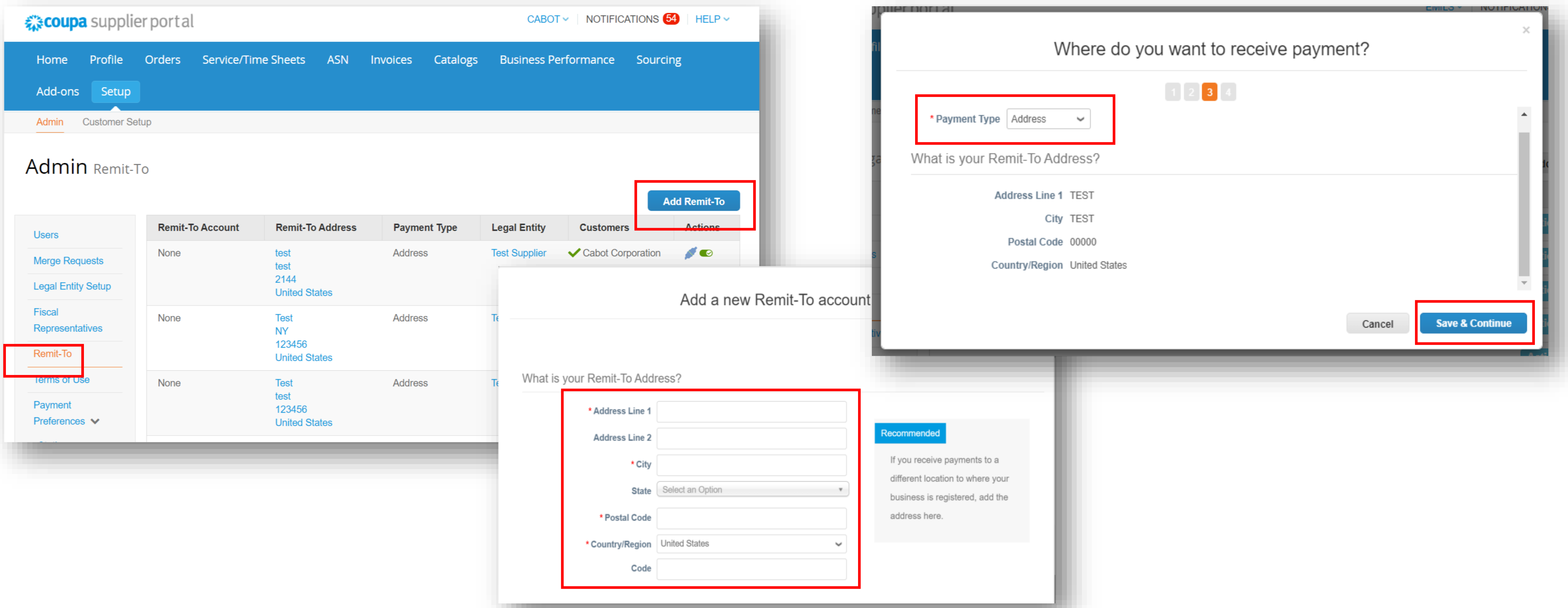
You will need to add Legal Entity information as well as Remit-To Addresses to enable E-Invoicing

– Click 'Setup' 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'



Enabling E-Invoicing – Adding Remit-To Address

- Click ‘Setup’ tab from the top menu bar then select ‘Remit-to’ from the menu on the left
- Click ‘Add Remit-To’
- Complete the invoice address details and select Payment Type as "Address", and click "Save & Continue"
- Proceed to next steps until Remit-To is created

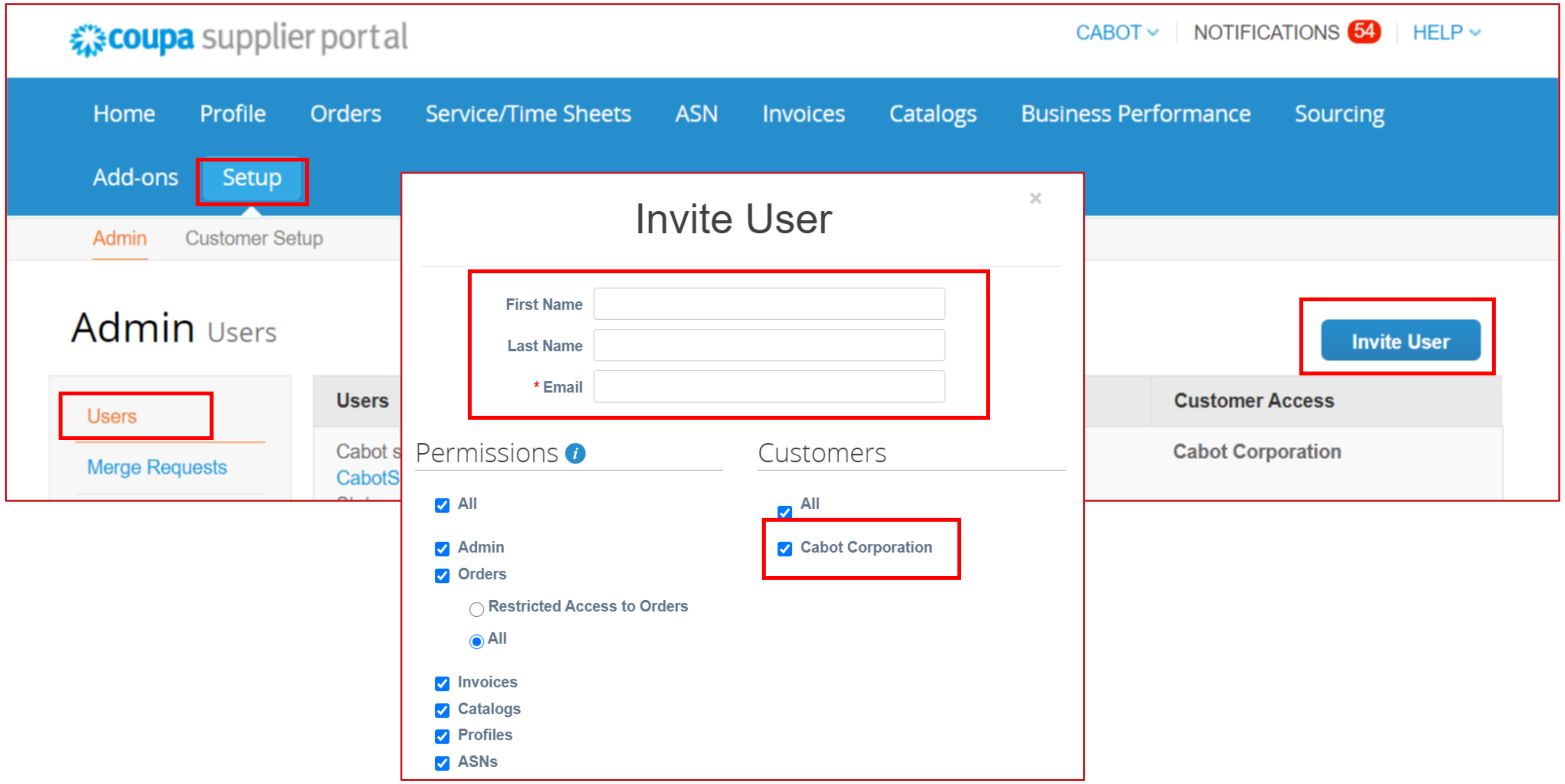


NOTE: Ensure Cabot has your current remit-to address on file to avoid processing delays in Coupa

Adding Users

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

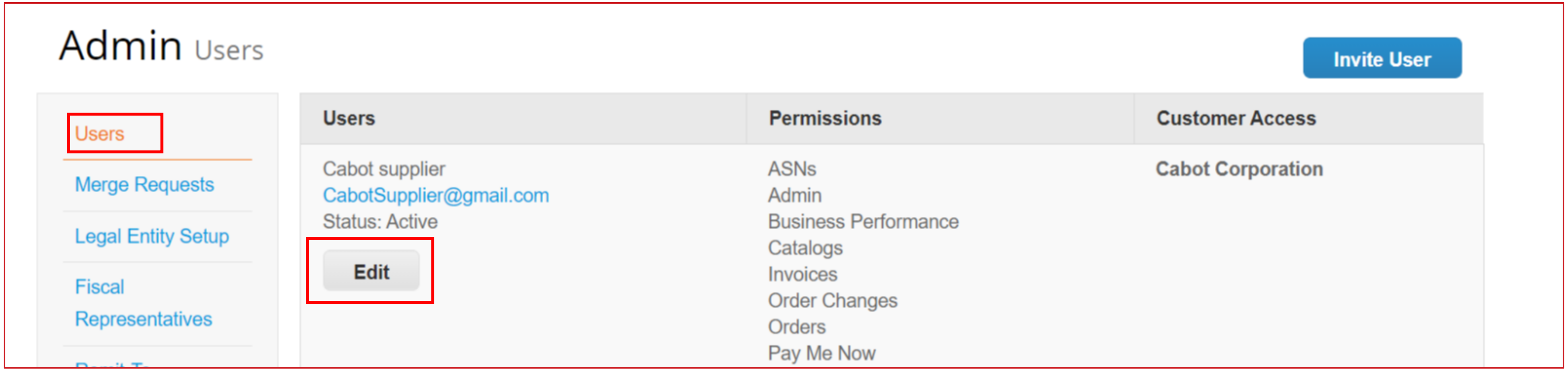
- From the top menu bar, select ‘Setup’, then click ‘Users’ tab and then click ‘Invite User’
- Enter at least the employee’s email address in the ‘Invite User’ popup window and click ‘Send Invitation’
- You can restrict access to specific customers by checking/unchecking customer name boxes under ‘Customers’ section



Editing Users

If desired, you can edit existing users

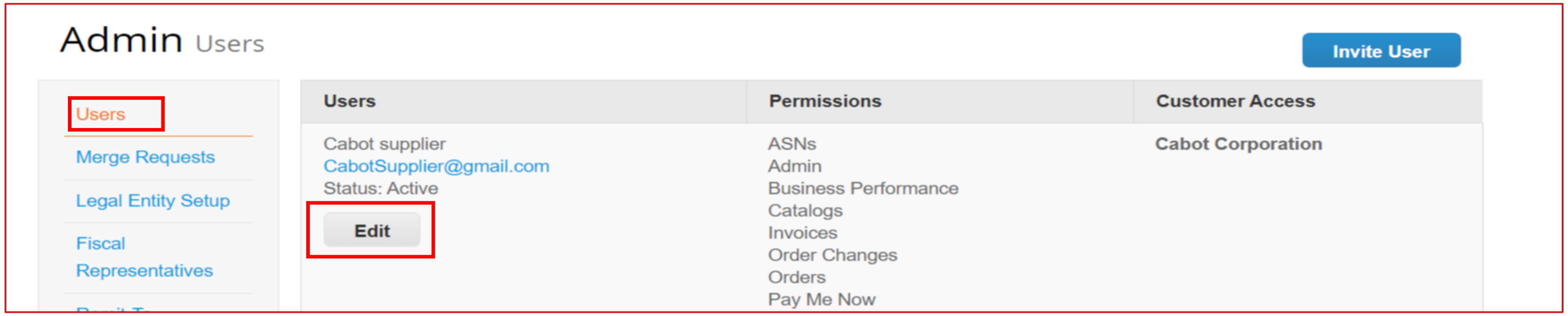
- From the top menu bar, select 'Admin' then click 'Users' tab
- Click 'Edit'
- Review and edit User Info
- Enable or disable permissions under Permissions section
- You can restrict access to specific customers by checking/unchecking customer name boxes under 'Customers' section
- Click 'Save'



Employee Terminations

If an employee with access to CSP is terminated from your company, it is the CSP Admin's responsibility to revoke that employee's access.

– From the top menu bar, select 'Setup' then click 'Users' tab
– Click 'Edit'
– Select 'Deactivate User'



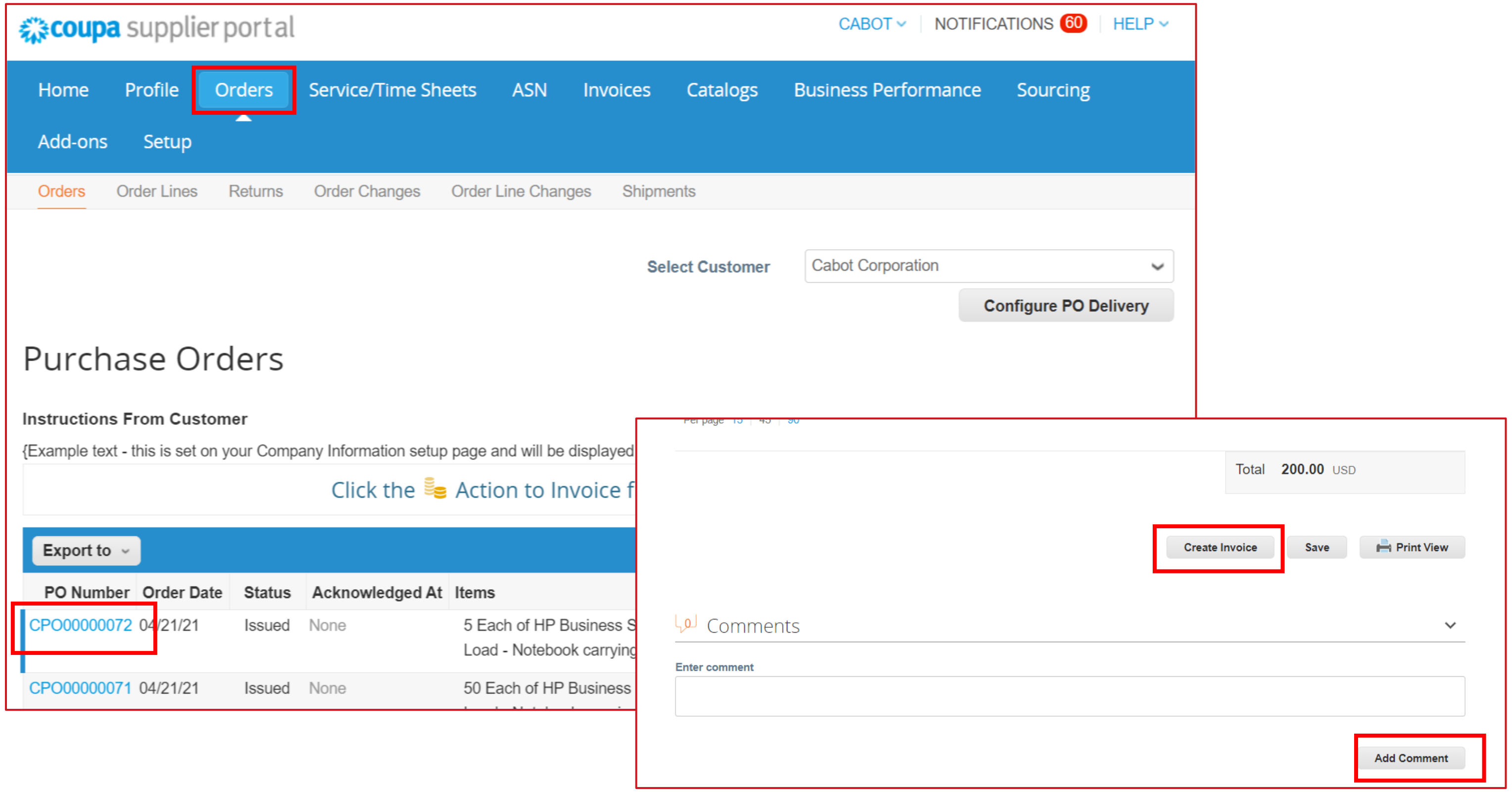
CSP Supplier Activities

Cabot CSP Supplier Training

Receiving/Viewing a Purchase Order

Regardless of the PO delivery preference (email, cXML, etc.), you will have access to all open POs within the CSP

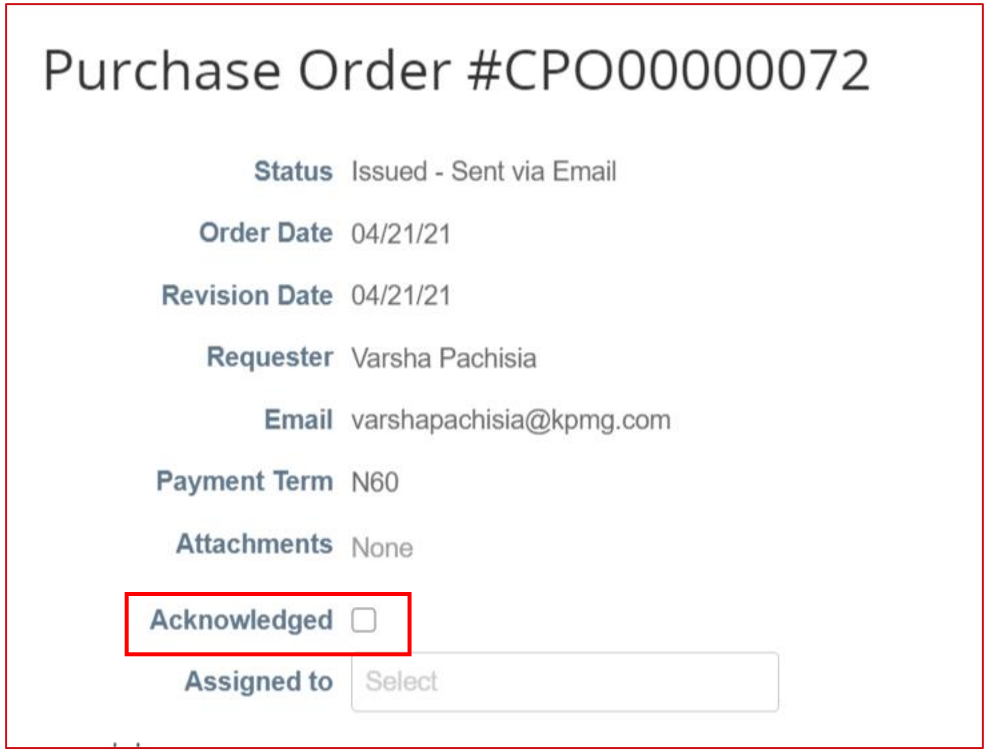
- Select Orders from the top menu bar
- When the page refreshes, select the applicable PO number from the list of Purchase Orders. You can also use the Search bar to locate the PO
- Click PO Number hyperlink to view the complete PO details



Acknowledging a Purchase Order

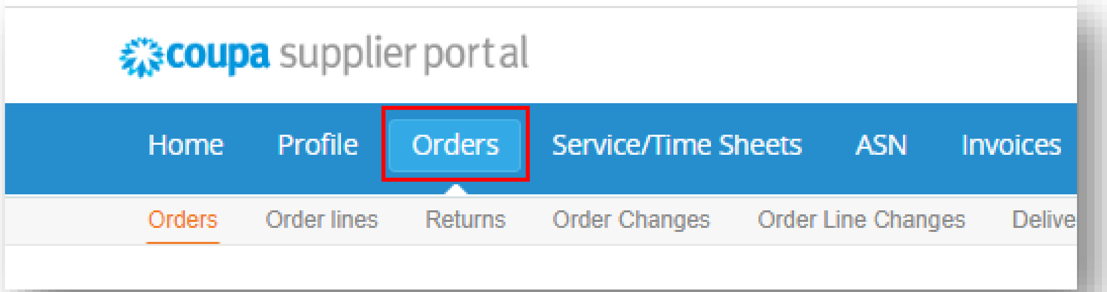
On the specific PO details page, select ‘Acknowledged’ check box to acknowledge the receipt of PO

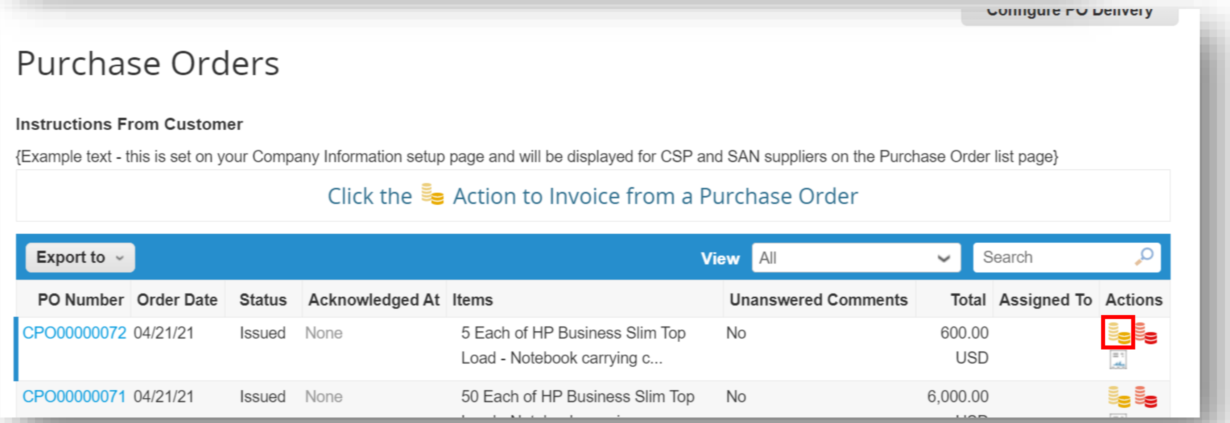
Cabot will receive this acknowledgement in their Coupa system

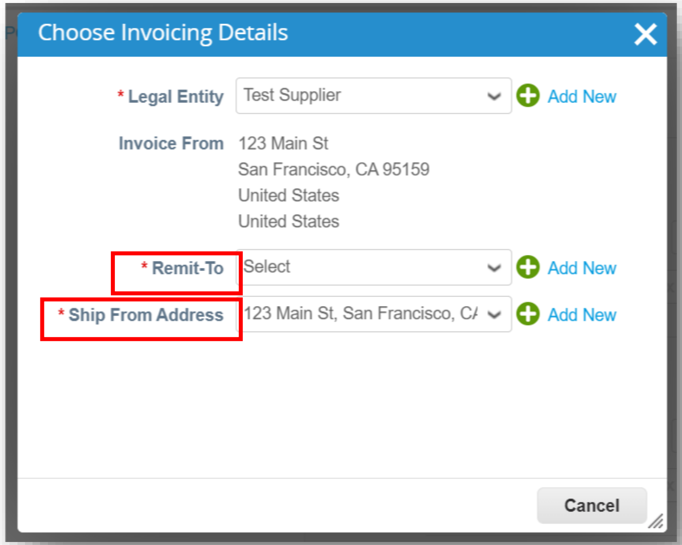


Creating a PO-Backed Invoice

– Click ‘Orders’ from the top menu bar
– Under the ‘Actions’ column of the specific PO row, select the yellow coin stack icon to flip the PO into an invoice. This will take you to the invoice creation screen
– Select a remit-to and ship from address
    - If the correct Remit-To Address does not appear, click magnifying glass icon and then click ‘Create’
    - To avoid any currency exchange rate issues, please ensure selecting Remit-To address created for Payment Type "Address" (see slide 12)



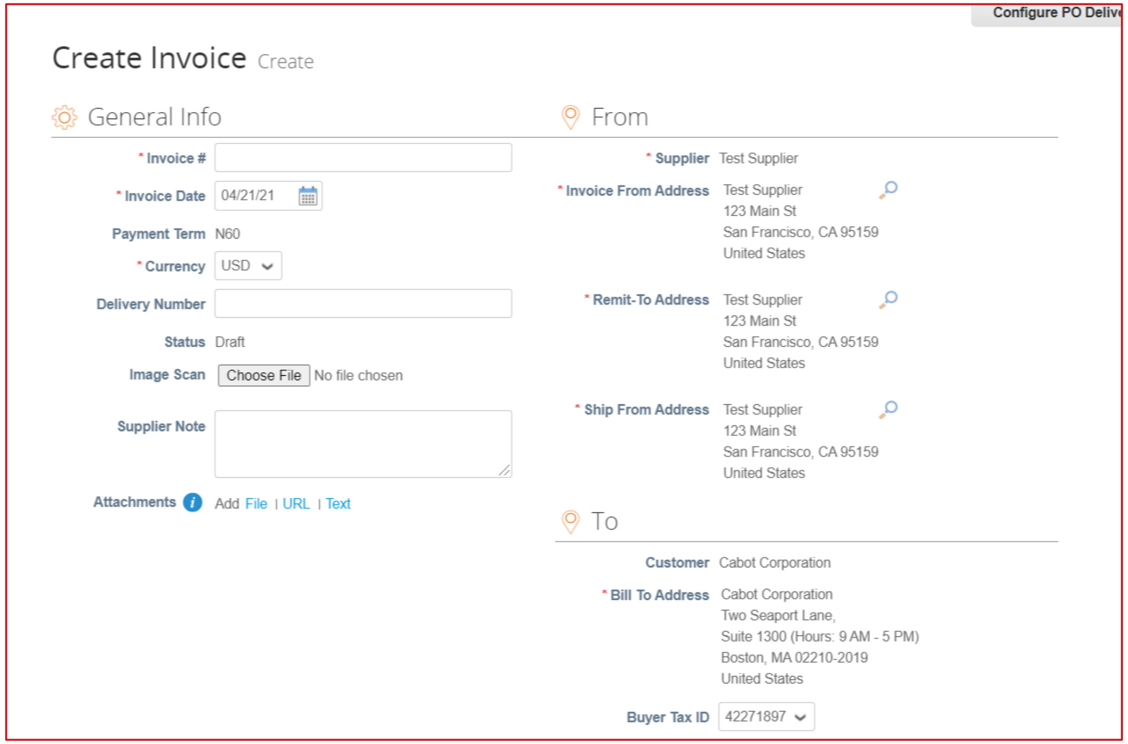




Creating a PO-Backed Invoice

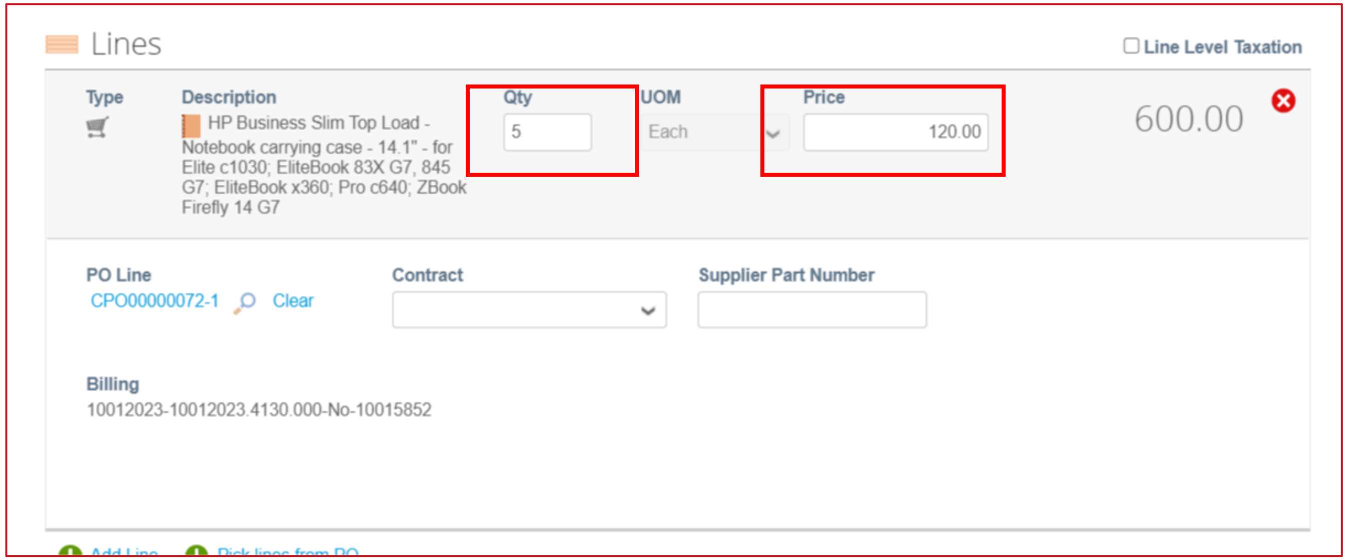
On the invoice creation screen, complete all the necessary information (all required fields are indicated with an asterisk)

- Use your own invoice numbering convention for the Invoice # field
- Attach your organization's invoice file under 'Image scan' section
- Details from the PO are automatically populated to the invoice draft
- Verify auto populated invoice information at the header and line level and adjust as necessary

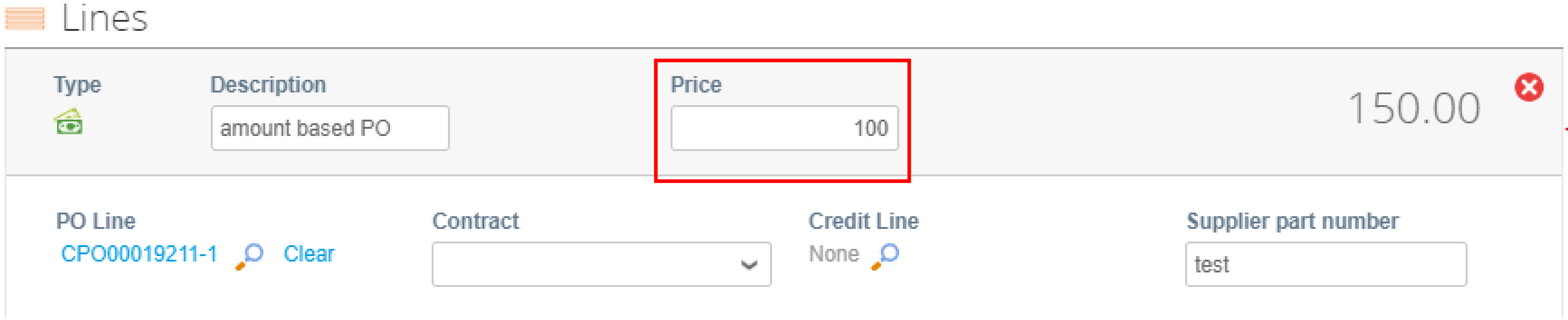


NOTE: You can add multiple invoice attachments or only partially invoice a PO as needed

Creating a PO-Backed Invoice



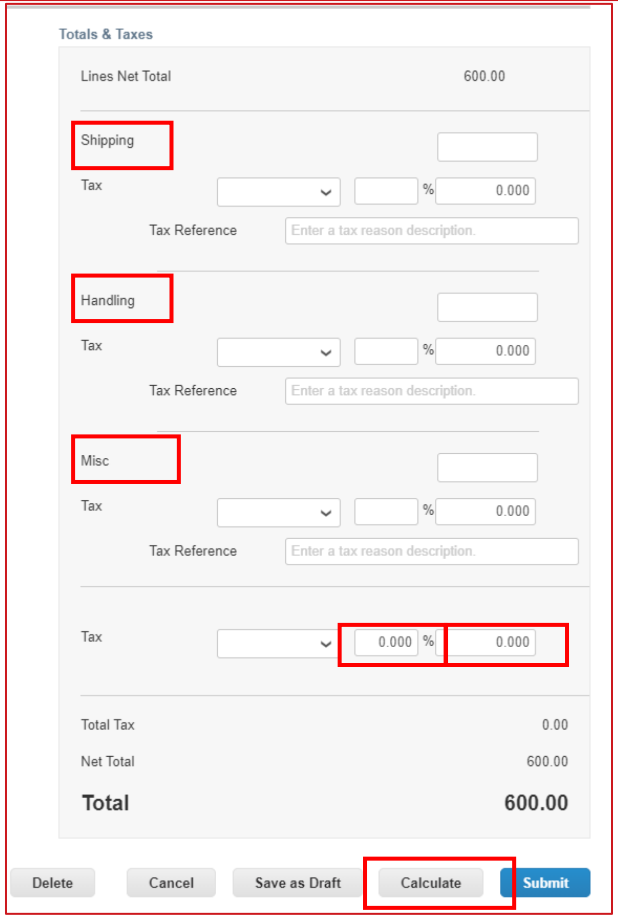
Quantity based PO: quantity & price can be amended (in case of discounts/ increases or partial deliveries)



Amount based PO: price can be amended in case of partial invoicing

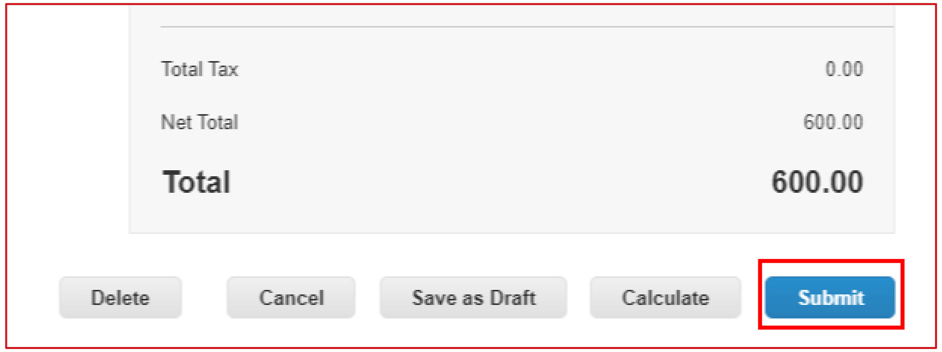
Creating a PO-Backed Invoice

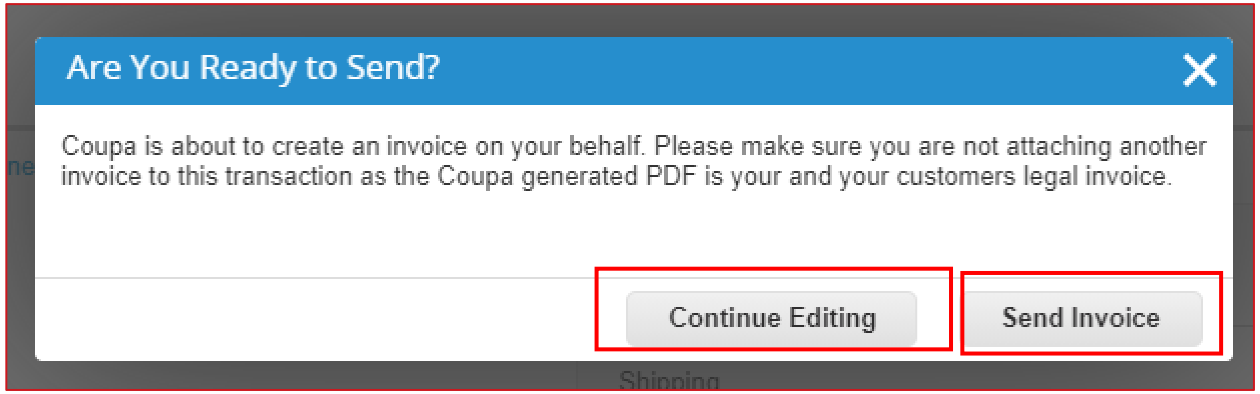
– If applicable, add any shipping, handling and tax information
  - You can add applicable tax in the proper section by one of the following methods:
    - Manually enter a tax percentage
    - Manually enter a tax amount ($)
  - Click **'Calculate'** to update the invoice total after all additional charges are added

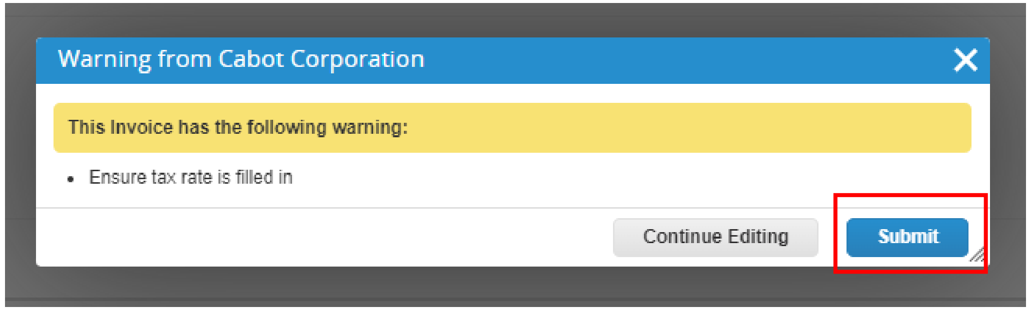


Creating a PO-Backed Invoice

- When you have completed all information on the invoice, click ‘Submit’
- After you click ‘Submit’, a popup will appear to confirm if you are ready to send the invoice. **Once submitted, an invoice cannot be edited via CSP unless disputed by Cabot**
- If you wish to go back to edit, click ‘Continue Editing’
- Click ‘Send Invoice’ to send the confirmed complete invoice to Cabot
- In the final stage a warning message about Tax will appear, click ‘Submit’





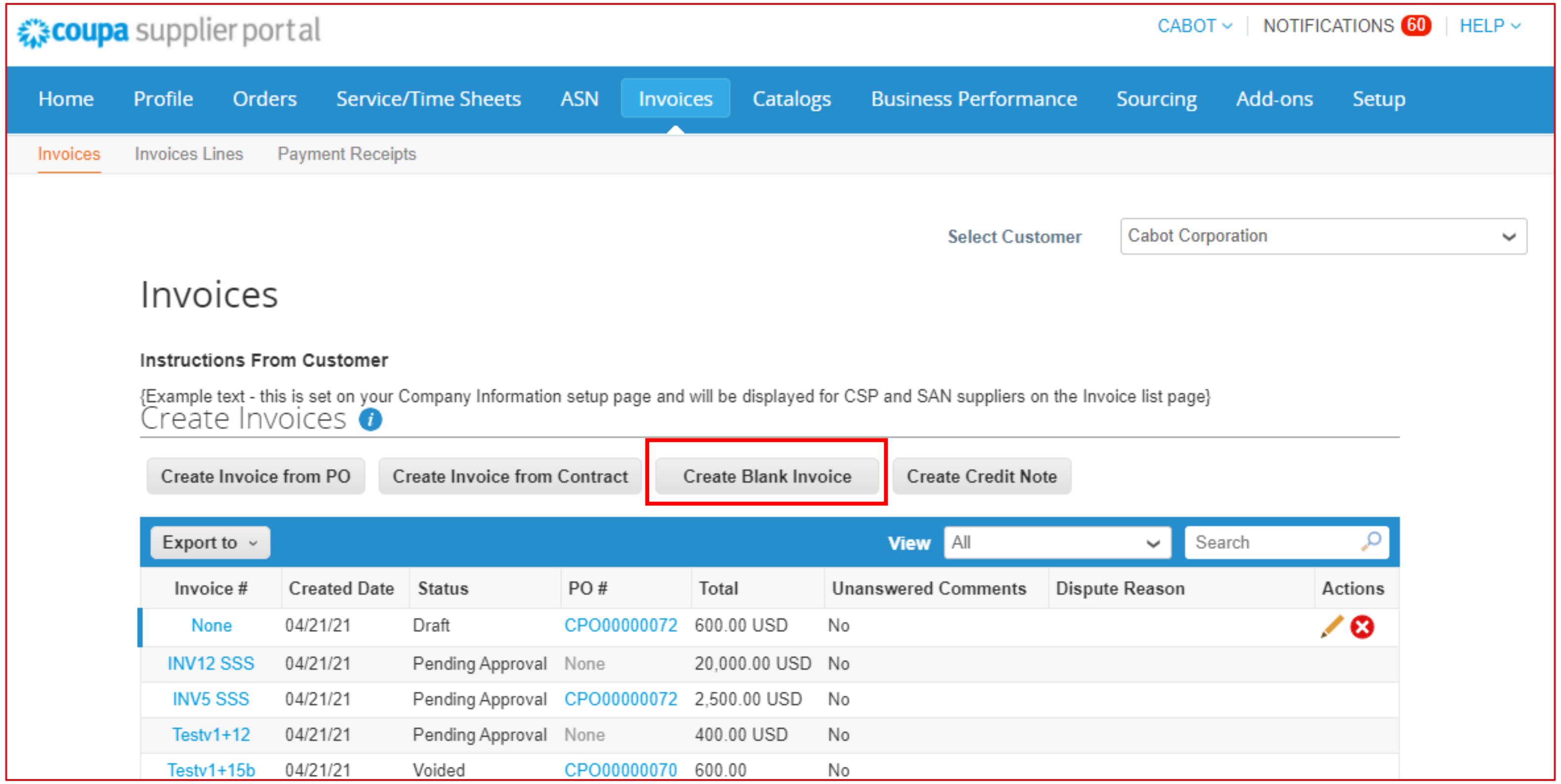


Creating a PO-Backed Invoice

- Enter any necessary comments for Cabot, then click ‘Add Comment’
- Add additional attachments if necessary
- Comments can be added during and also after the invoice has been submitted

Creating a Non-PO Backed Invoice

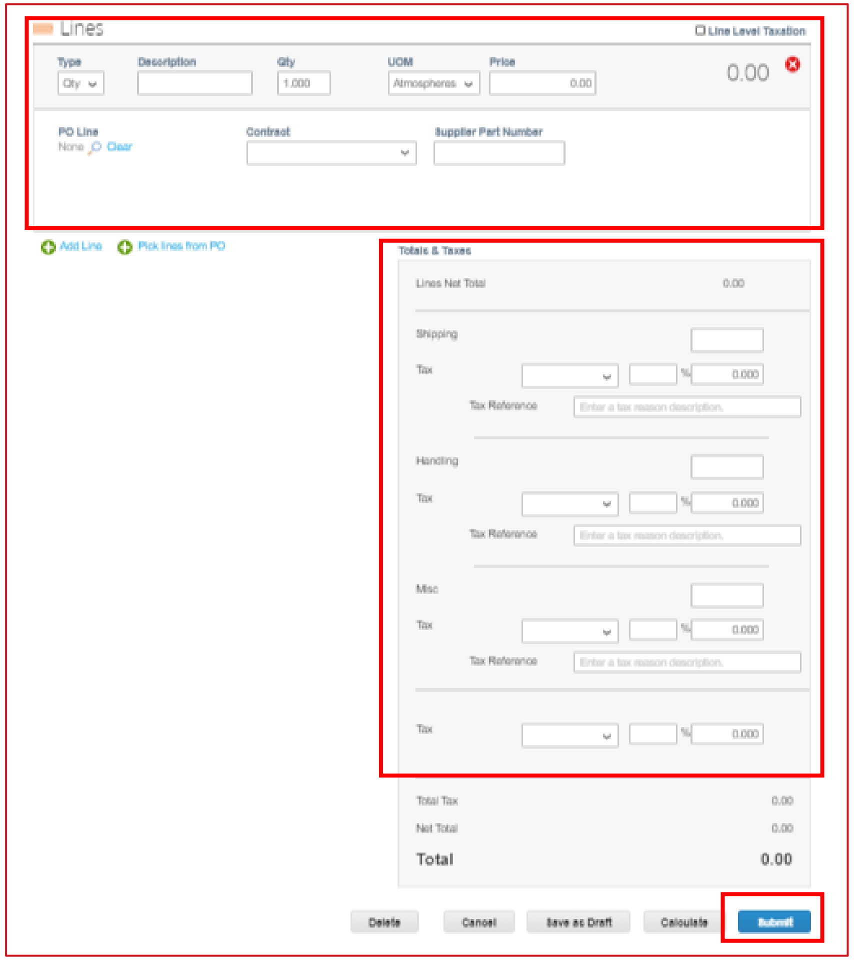
– Click ‘Invoices’ from the top menu bar
– Click ‘Create Blank Invoice’
– Fill out invoice header details



NOTE: Correct requester name and email will be mandatory to submit a non-PO backed invoice

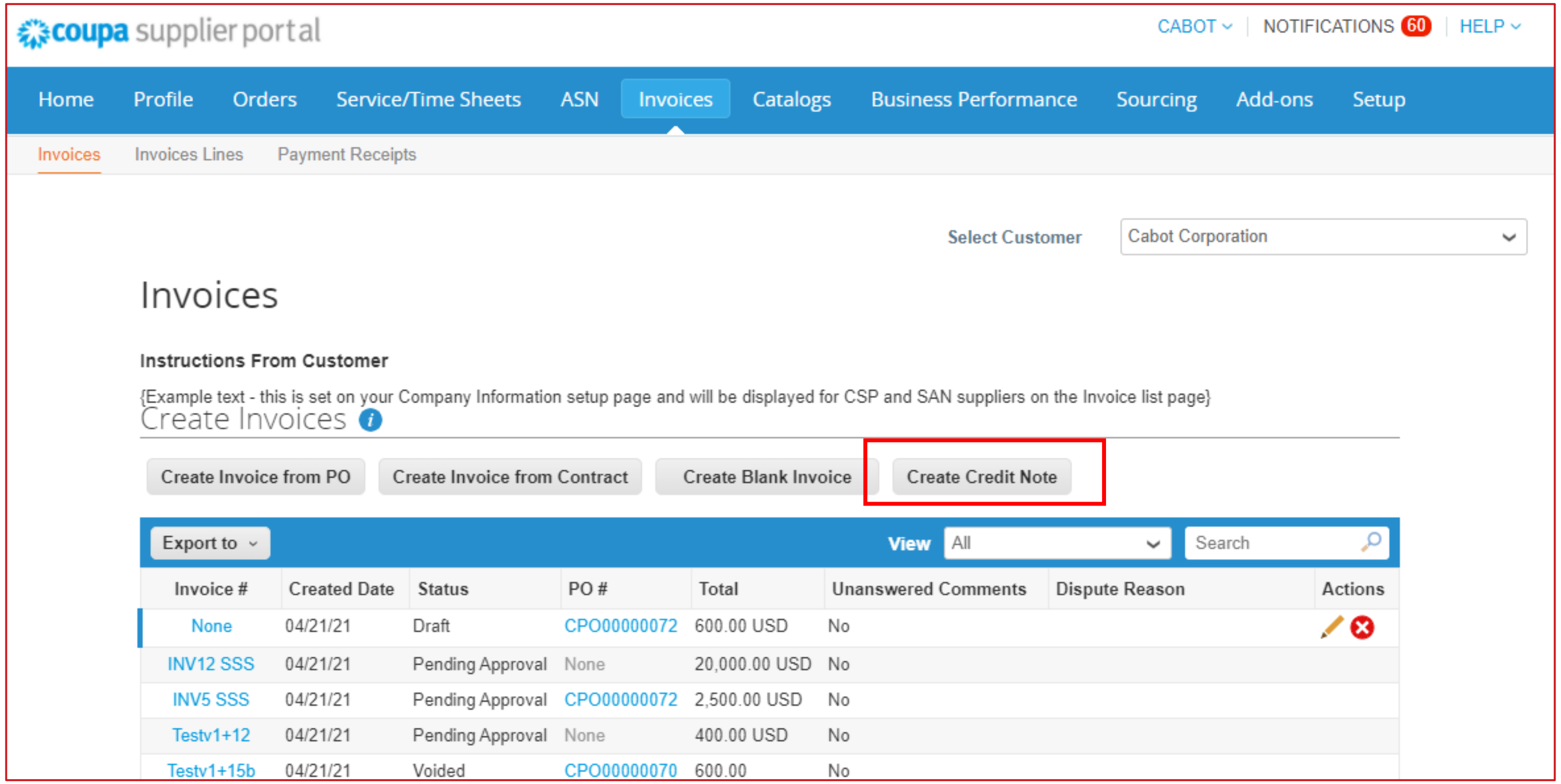
Creating a Non-PO Backed Invoice

- Fill out line level details (Type, Description, Qty (for Qty based only), UOM (for Qty based only), Price, Contract)
- If applicable, add any shipping, handling and tax information
- Click Calculate, Submit and Send Invoice



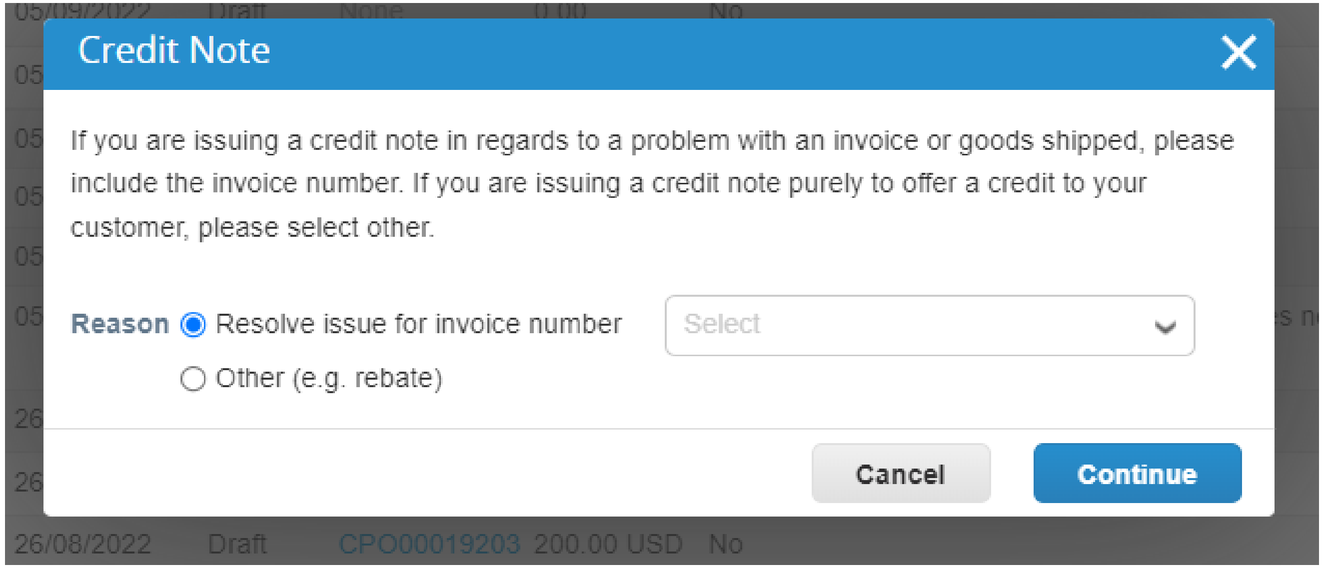
Creating a Credit Note

- Click ‘Invoices’ from the top menu bar
- Click ‘Create Credit Note’. A pop-up window will appear (see next slide)



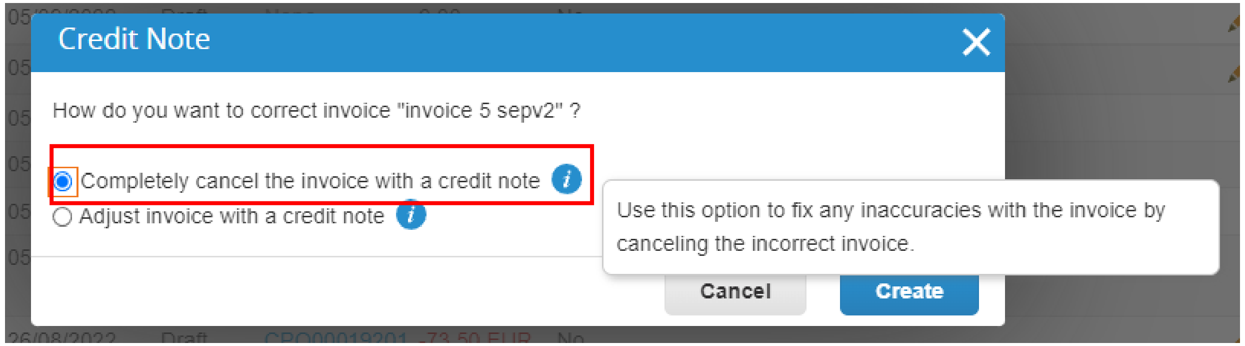
Creating a Credit Note

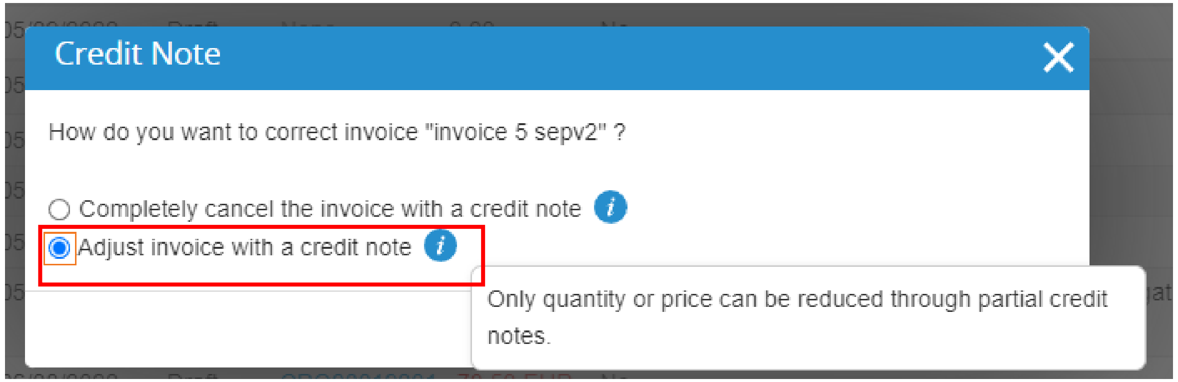
- Select ‘Resolve issue for Invoice number’
- Select the invoice number from the dropdown for which you want to send the credit note
- Press ‘Continue’

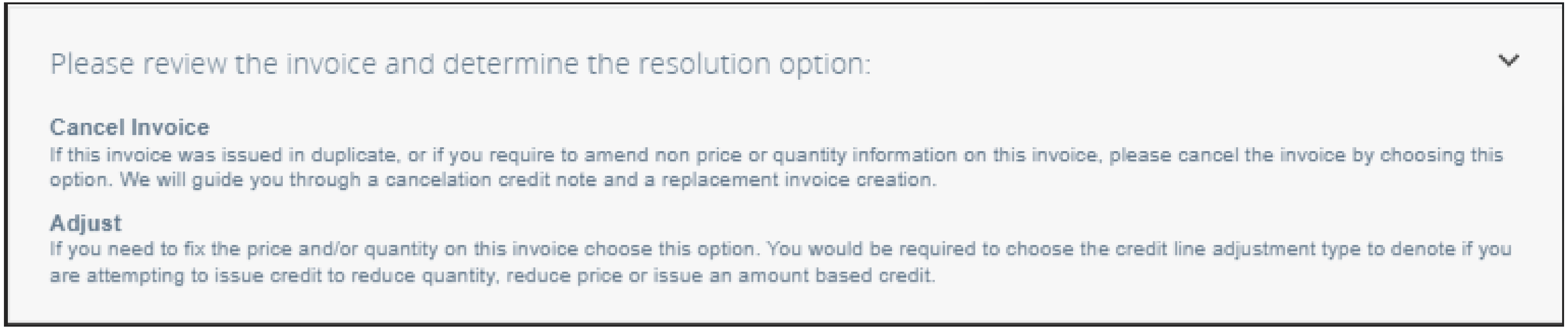


Creating a Credit Note

- Select the resolution option
  - Completely Cancel
  - Adjust invoice

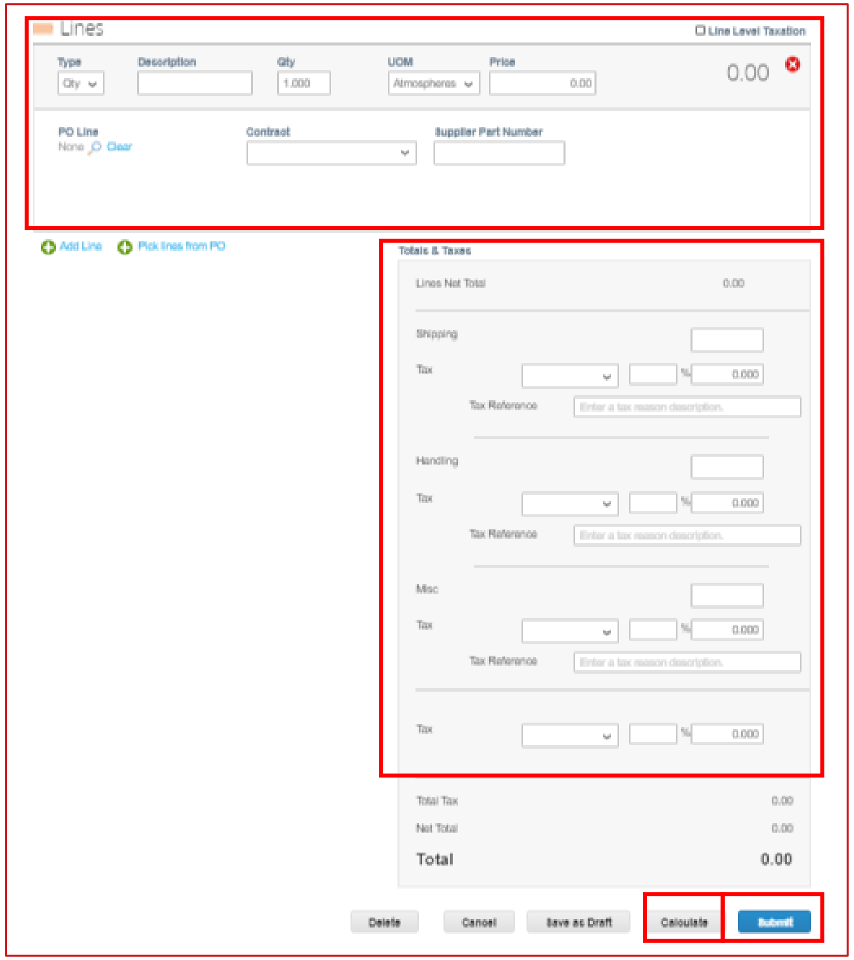






Creating a Credit Note

- Fill out Credit note header details (Credit note number or other applicable fields)
- If applicable, add any shipping, handling and tax information
- Click Calculate & Submit, then click Send

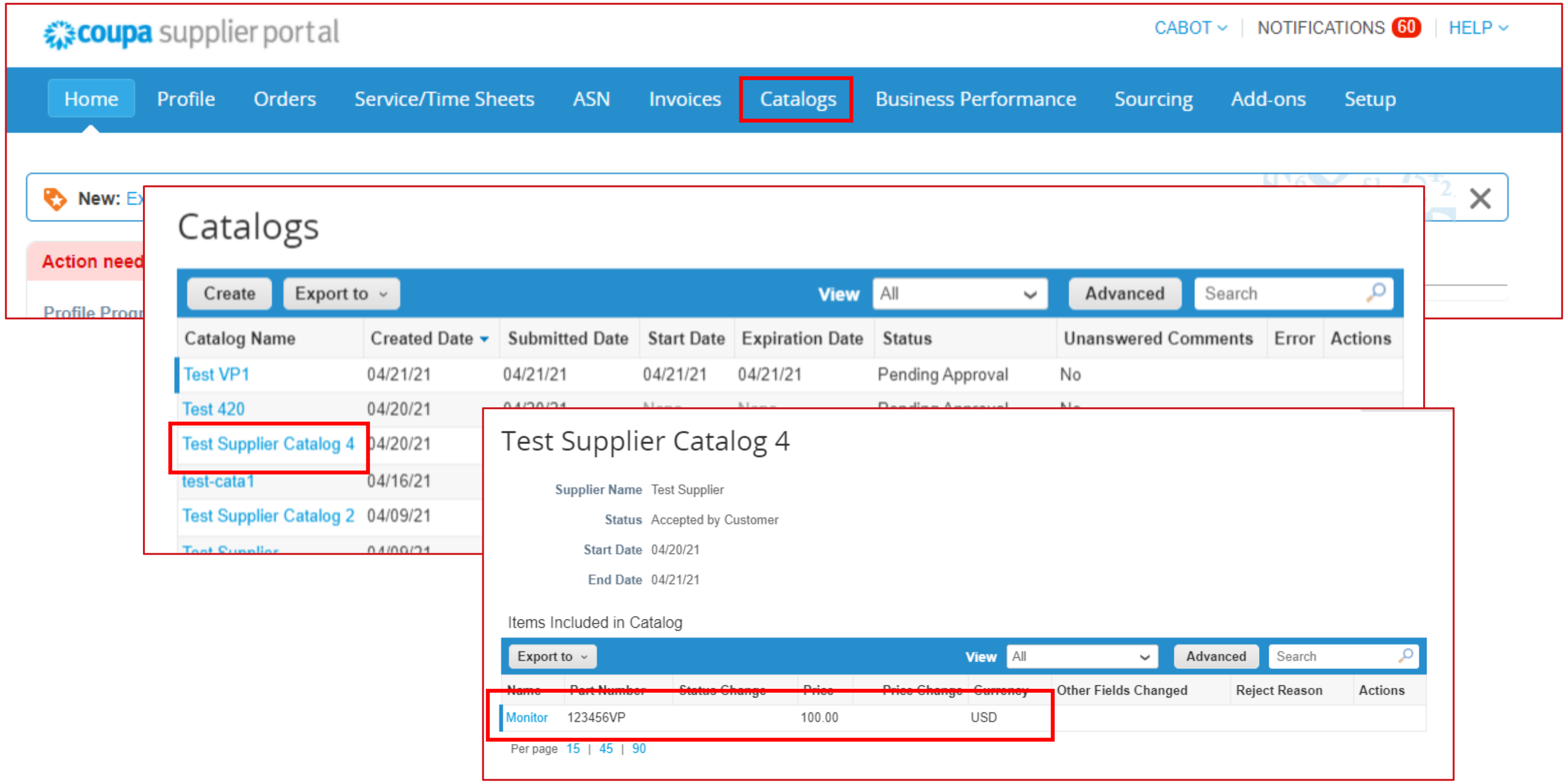


NOTE: Credit note quantity should be negative as credit note total should be negative

Viewing and Managing Catalogs

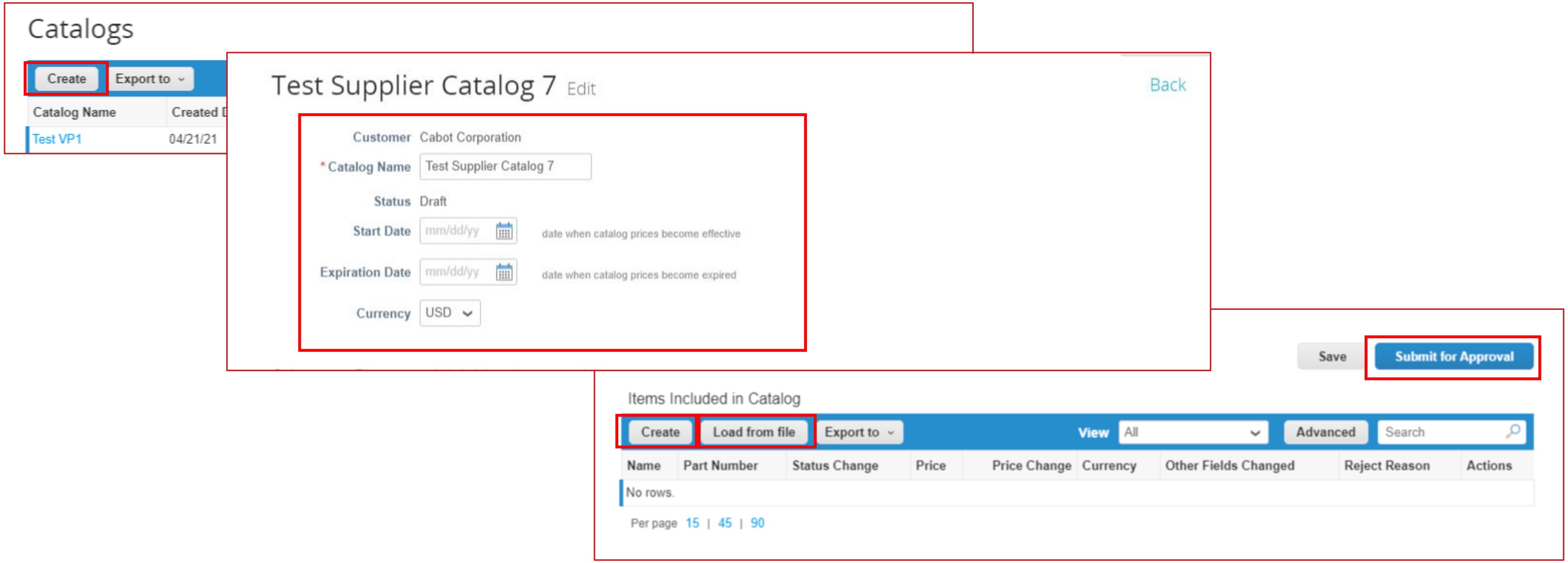
- Select Catalogs from the top menu bar to view your Cabot catalog information and available actions*
- Export to: Export catalog details to CSV or Excel
- Click on the Catalog Name to view the list of individual catalog items
- Click on the Item Name in your catalog to view the detailed item page

*Note: Only Draft status catalogs not submitted for Cabot Buyer approval can be directly edited or deleted



Viewing and Managing Catalogs

– Click Create to create and update catalog request
– Enter catalog information including start and end date
– You can either bulk upload catalog item updates via Load from File or individually via Create
– Click 'Submit for Approval' when catalog updates, additions or changes are complete to automatically send for Cabot's review



Additional Resources

- General Information:

  https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

  https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/03_CSP_Videos

- Coupa Supplier Portal Log In: https://supplier.coupahost.com/

- Supplier Enablement: Contact Cabot's Procurement Team to receive a CSP invite or set up a hosted catalog: supplier.communication@cabotcorp.com.