

Coupa Supplier Portal Training

Cabot Corporation

Agenda

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	Acknowledging a Purchase Order
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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

Cabot CSP Supplier Training

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.

The screenshot displays the Cabot Supplier Actionable Notification (SAN) interface. At the top left is the Cabot logo. Below it, the text reads "Cabot Carbon Ltd Purchase Order #CPO00065365". The main section is titled "Order Summary" and contains the following details:

- Date: 11/04/22
- PO Total: 80.00 EUR
- Shipping Terms: DAP
- Payment Terms: N60
- Contact: [Redacted]

Below the summary are two orange buttons: "Manage Order" and "Create Invoice". Underneath these buttons is the text "Orders details below". At the bottom of the page, there is a light blue bar containing three circular icons with corresponding labels: a checkmark icon for "Acknowledge PO", a speedometer icon for "Accelerate Payment", and a speech bubble icon for "Add Comment".



CSP Supplier Profile and Account Setup

Cabot CSP Supplier Training

Connecting to Cabot via Coupa

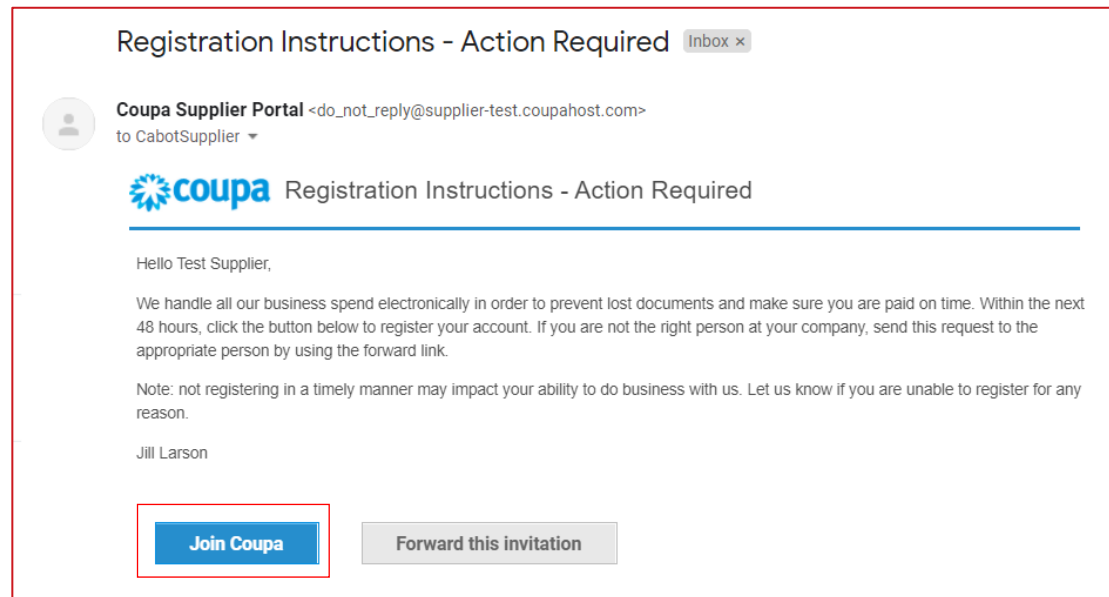
It is vital that all suppliers connect to the Coupa platform to transact with Cabot successfully.

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

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* Email

* 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](#).

Forward your invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).

Forward email

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'

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. The 'Setup' tab is highlighted in the 'Add-ons' section. Below the navigation bar, the 'Admin' section is visible, with 'Legal Entity Setup' highlighted in the left sidebar. The main content area shows the 'Legal Entity Setup' page, with the 'Add Legal Entity' button highlighted. A modal window titled 'Where's your business located?' is open, showing a form with 'Legal Entity Name' and 'Country/Region' fields, and a 'Continue' button.

Legal Entity
Booking Hold Test
Invoice From
Remit-To Accounts
Address
987 Broadway Dallas TX 87564 United States
Remit-To Address
Test Supplier

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

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing

Add-ons Setup

Admin Customer Setup

Admin Remit-To

Users	Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
Merge Requests	None	test test 2144 United States	Address	Test Supplier	✓ Cabot Corporation	
Legal Entity Setup	None	Test NY 123456 United States	Address	Test Supplier	✓ Cabot Corporation	
Fiscal Representatives	None	Test test 123456 United States	Address	Test Supplier	✓ Cabot Corporation	
Remit-To						
Terms of Use						
Payment Preferences						

Where do you want to receive payment?

1 2 3 4

* Payment Type Address

What is your Remit-To Address?

Address Line 1 TEST
City TEST
Postal Code 00000
Country/Region United States

Cancel Save & Continue

Add a new Remit-To account

What is your Remit-To Address?

* Address Line 1
Address Line 2
* City
State Select an Option
* Postal Code
* Country/Region United States
Code

Recommended

If you receive payments to a different location to where your business is registered, add the address here.



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

The screenshot displays the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. The 'Setup' tab is highlighted in the 'Add-ons' section. Below this, the 'Admin' and 'Customer Setup' tabs are visible, with 'Users' selected. The 'Admin Users' section shows a 'Merge Requests' button. The 'Invite User' popup window is open, featuring input fields for 'First Name', 'Last Name', and '* Email'. The 'Permissions' section is checked for 'All', 'Admin', and 'Orders', with 'Restricted Access to Orders' unselected. The 'Customers' section has 'All' and 'Cabot Corporation' checked. A blue 'Invite User' button is located in the bottom right corner of the popup.

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'

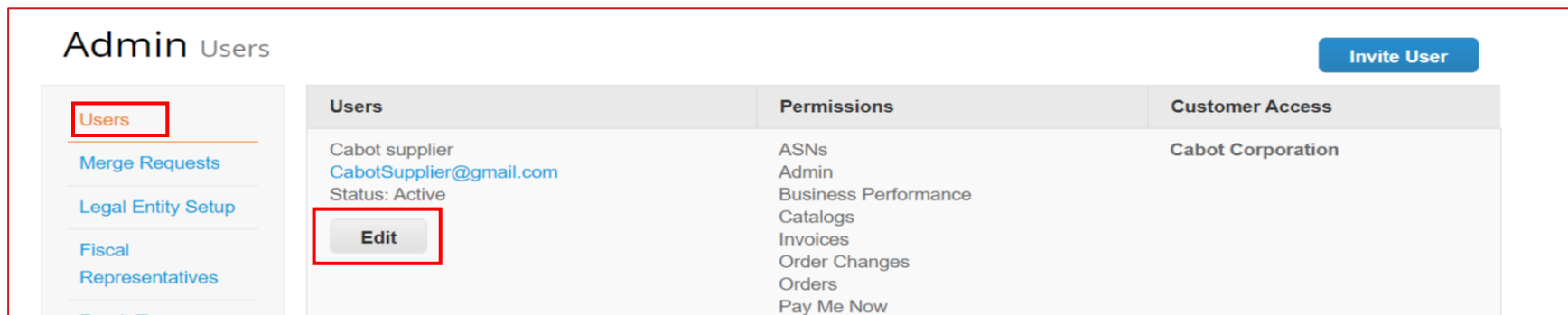
The screenshot shows the 'Admin Users' interface. On the left, there is a sidebar with navigation options: 'Users' (highlighted with a red box), 'Merge Requests', 'Legal Entity Setup', 'Fiscal', and 'Representatives'. The main content area is a table with three columns: 'Users', 'Permissions', and 'Customer Access'. The 'Users' column contains the text 'Cabot supplier', the email 'CabotSupplier@gmail.com', and 'Status: Active'. Below this text is an 'Edit' button, which is highlighted with a red box. The 'Permissions' column lists various system areas: ASNs, Admin, Business Performance, Catalogs, Invoices, Order Changes, Orders, and Pay Me Now. The 'Customer Access' column shows 'Cabot Corporation'. In the top right corner, there is a blue button labeled 'Invite User'.

Users	Permissions	Customer Access
Cabot supplier CabotSupplier@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now	Cabot Corporation

Employee Terminations

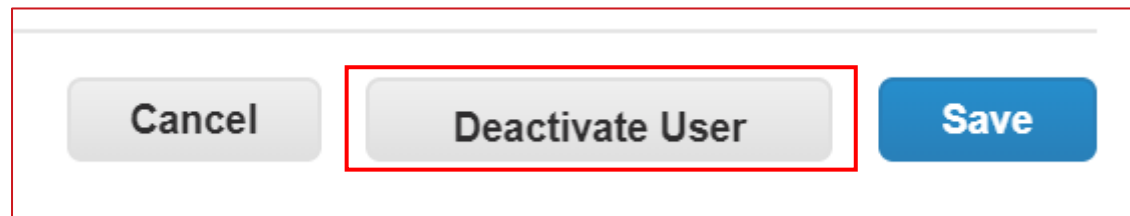
If an employee with access to CSP is terminated from your company, it is the CSP Admin's responsibility to revoke that employee's access.

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



The screenshot shows the 'Admin Users' interface. On the left is a sidebar with navigation options: 'Users' (highlighted with a red box), 'Merge Requests', 'Legal Entity Setup', 'Fiscal Representatives', and 'Product T...'. The main content area displays a user profile for 'Cabot supplier' with email 'CabotSupplier@gmail.com' and status 'Active'. The 'Edit' button is highlighted with a red box. The user's permissions are listed as: ASNs, Admin, Business Performance, Catalogs, Invoices, Order Changes, Orders, and Pay Me Now. The customer access is 'Cabot Corporation'. An 'Invite User' button is visible in the top right corner.

Users	Permissions	Customer Access
Cabot supplier CabotSupplier@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now	Cabot Corporation



The screenshot shows a dialog box with three buttons: 'Cancel', 'Deactivate User' (highlighted with a red box), and 'Save'.



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

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'CABOT', 'NOTIFICATIONS 60', and 'HELP' are on the right. The main navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. Below this, there are sub-menus for 'Add-ons' and 'Setup'. The 'Orders' sub-menu is expanded, showing 'Orders' (highlighted), 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Shipments'. A 'Select Customer' dropdown is set to 'Cabot Corporation', with a 'Configure PO Delivery' button next to it.

The main content area is titled 'Purchase Orders'. Underneath, there is a section for 'Instructions From Customer' with a note: '(Example text - this is set on your Company Information setup page and will be displayed)'. Below this is a button labeled 'Click the Action to Invoice f'.

An 'Export to' dropdown menu is visible above a table of purchase orders. The table has columns for 'PO Number', 'Order Date', 'Status', 'Acknowledged At', and 'Items'. The first row is highlighted with a red box:

PO Number	Order Date	Status	Acknowledged At	Items
CPO00000072	04/21/21	Issued	None	5 Each of HP Business S Load - Notebook carrying
CPO00000071	04/21/21	Issued	None	50 Each of HP Business

To the right of the table, a detailed view of the selected PO is shown. It includes a 'Total 200.00 USD' box, a 'Create Invoice' button (highlighted with a red box), a 'Save' button, and a 'Print View' button. Below this is a 'Comments' section with a dropdown arrow, an 'Enter comment' text input field, and an 'Add Comment' button (highlighted with a red box).

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

Purchase Order #CPO00000072

Status Issued - Sent via Email

Order Date 04/21/21

Revision Date 04/21/21

Requester Varsha Pachisia

Email varshapachisia@kpmg.com

Payment Term N60

Attachments None



Acknowledged

Assigned to

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)

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box), 'Service/Time Sheets', 'ASN', and 'Invoices'. Below this, a secondary navigation bar includes 'Orders', 'Order lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Deliveries'. The main content area is titled 'Purchase Orders' and includes instructions from the customer. Below the instructions is a table of purchase orders.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CPO00000072	04/21/21	Issued	None	5 Each of HP Business Slim Top Load - Notebook carrying c...	No	600.00 USD		
CPO00000071	04/21/21	Issued	None	50 Each of HP Business Slim Top	No	6,000.00 USD		

The screenshot shows a 'Choose Invoicing Details' dialog box. It contains the following fields:

- * Legal Entity: Test Supplier (dropdown menu with '+ Add New' button)
- Invoice From: 123 Main St, San Francisco, CA 95159, United States, United States
- * Remit-To: Select (dropdown menu with '+ Add New' button)
- * Ship From Address: 123 Main St, San Francisco, CA (dropdown menu with '+ Add New' button)
- Cancel button

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

Configure PO Delivery

Create Invoice Create

General Info

* Invoice #

* Invoice Date 04/21/21

Payment Term N60

* Currency USD

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

Attachments

From

* Supplier Test Supplier

* Invoice From Address Test Supplier
123 Main St
San Francisco, CA 95159
United States

* Remit-To Address Test Supplier
123 Main St
San Francisco, CA 95159
United States

* Ship From Address Test Supplier
123 Main St
San Francisco, CA 95159
United States

To

Customer Cabot Corporation

* Bill To Address Cabot Corporation
Two Seaport Lane,
Suite 1300 (Hours: 9 AM - 5 PM)
Boston, MA 02210-2019
United States

Buyer Tax ID 42271897



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

Creating a PO-Backed Invoice

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	HP Business Slim Top Load - Notebook carrying case - 14.1" - for Elite c1030; EliteBook 83X G7, 845 G7; EliteBook x360; Pro c640; ZBook Firefly 14 G7	5	Each	120.00	600.00

PO Line: CPO0000072-1 [Clear](#) Contract: Supplier Part Number:

Billing: 10012023-10012023.4130.000-No-10015852

[Add Line](#) [Pick lines from PO](#)

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

Lines

Type	Description	Price	
	amount based PO	100	150.00

PO Line: CPO00019211-1 [Clear](#) Contract: Credit Line: None [Clear](#) Supplier part number: test

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

Totals & Taxes

Lines Net Total	600.00
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Shipping

Tax % 0.000

Tax Reference

Handling

Tax % 0.000

Tax Reference

Misc

Tax % 0.000

Tax Reference

Tax % 0.000

Total Tax	0.00
Net Total	600.00
Total	600.00

Delete Cancel Save as Draft **Calculate** Submit

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'

Total Tax	0.00
Net Total	600.00
Total	600.00

Delete Cancel Save as Draft Calculate **Submit**

Are You Ready to Send? X

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Continue Editing Send Invoice

Warning from Cabot Corporation X

This Invoice has the following warning:

- Ensure tax rate is filled in

Continue Editing **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

Comments Mute Comments ▾

Enter Comment

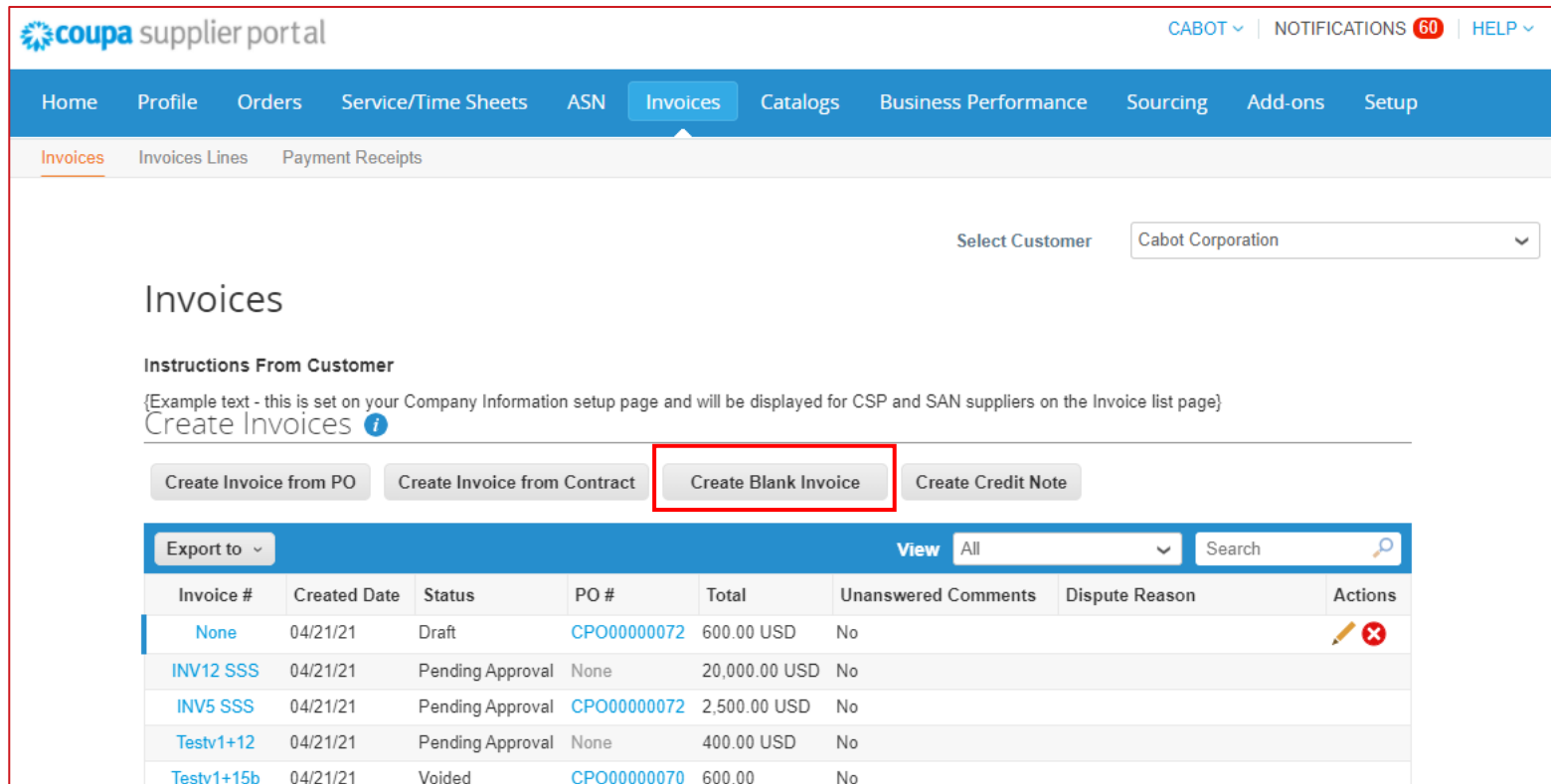
Send Comment notification to a user by typing @name (ex. @JohnSmith)

Attachments [Add File](#) | [URL](#)



[Add Comment](#)

Creating a Non-PO Backed Invoice

- Click 'Invoices' from the top menu bar
- Click 'Create Blank Invoice'
- Fill out invoice header details



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Invoices' menu item is active. Below the navigation bar, there are sub-tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. A 'Select Customer' dropdown menu is set to 'Cabot Corporation'. The main heading is 'Invoices'. Below this, there is a section for 'Instructions From Customer' with a placeholder text: '{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}'. There are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice' (highlighted with a red box), and 'Create Credit Note'. Below the buttons is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The table contains five rows of invoice data.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/21/21	Draft	CPO00000072	600.00 USD	No		 
INV12 SSS	04/21/21	Pending Approval	None	20,000.00 USD	No		
INV5 SSS	04/21/21	Pending Approval	CPO00000072	2,500.00 USD	No		
Testv1+12	04/21/21	Pending Approval	None	400.00 USD	No		
Testv1+15b	04/21/21	Voided	CPO00000070	600.00	No		



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

The screenshot shows a software interface for creating a non-PO backed invoice. The interface is divided into several sections:

- Lines:** This section contains fields for Type (Qty), Description, Qty (1.000), UOM (Atmospheres), Price (0.00), PO Line (None), Contract, and Supplier Part Number. There is a checkbox for "Line Level Taxation" and a "Clear" button.
- Totals & Taxes:** This section contains fields for Shipping, Handling, and Misc, each with a Tax dropdown and a Tax Reference field. The "Lines Net Total" is 0.00.
- Summary:** At the bottom right, there is a summary table:

Total Tax	0.00
Net Total	0.00
Total	0.00
- Navigation:** At the bottom, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit.

Creating a Credit Note

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

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Invoices' menu item is active. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Cabot Corporation'. The main heading is 'Invoices'. Underneath, there is a section for 'Instructions From Customer' with a placeholder text and a 'Create Invoices' link. A row of buttons for creating invoices is visible: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a red box. Below the buttons is a table of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/21/21	Draft	CPO00000072	600.00 USD	No		
INV12 SSS	04/21/21	Pending Approval	None	20,000.00 USD	No		
INV5 SSS	04/21/21	Pending Approval	CPO00000072	2,500.00 USD	No		
Testv1+12	04/21/21	Pending Approval	None	400.00 USD	No		
Testv1+15b	04/21/21	Voided	CPO00000070	600.00	No		

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'

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

Reason Resolve issue for invoice number Other (e.g. rebate)

Select

Cancel Continue

Creating a Credit Note

- Select the resolution option
 - Completely Cancel
 - Adjust invoice

The screenshot shows a 'Credit Note' dialog box with the question 'How do you want to correct invoice "invoice 5 sepv2" ?'. Two radio button options are visible: 'Completely cancel the invoice with a credit note' (selected and highlighted with a red box) and 'Adjust invoice with a credit note'. An information icon is next to each option. A tooltip is displayed over the selected option, stating: 'Use this option to fix any inaccuracies with the invoice by canceling the incorrect invoice.' At the bottom of the dialog are 'Cancel' and 'Create' buttons.

The screenshot shows the same 'Credit Note' dialog box, but now the 'Adjust invoice with a credit note' option is selected and highlighted with a red box. The tooltip for this option reads: 'Only quantity or price can be reduced through partial credit notes.' The 'Completely cancel the invoice with a credit note' option is now unselected.

Please review the invoice and determine the resolution option: ▼

Cancel Invoice

If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancellation credit note and a replacement invoice creation.

Adjust

If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.

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

The screenshot shows a software interface for creating a credit note. It is divided into two main sections highlighted with red boxes:

- Lines Section:** Contains a table with columns for Type, Description, Qty, UOM, Price, and a total value of 0.00. Below the table are fields for PO Line, Contract, and Supplier Part Number.
- Totals & Taxes Section:** Contains fields for Shipping, Handling, and Misc, each with associated Tax and Tax Reference fields. At the bottom, there is a summary table with Total Tax, Net Total, and Total (all 0.00).

At the bottom of the form, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit. The Calculate and Submit buttons are highlighted with a red box.



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

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs' (highlighted with a red box), 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Catalogs' page shows a table of catalogs with columns for Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. The 'Test Supplier Catalog 4' entry is highlighted with a red box. A detailed view of this catalog is shown below, including the Supplier Name 'Test Supplier', Status 'Accepted by Customer', Start Date '04/20/21', and End Date '04/21/21'. The 'Items Included in Catalog' section shows a table with columns for Name, Part Number, Status Change, Price, Price Change, Currency, Other Fields Changed, Reject Reason, and Actions. The 'Monitor' item with Part Number '123456VP' and Price '100.00' is highlighted with a red box.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Test VP1	04/21/21	04/21/21	04/21/21	04/21/21	Pending Approval	No		
Test 420	04/20/21	04/20/21	None	None	Pending Approval	No		
Test Supplier Catalog 4	04/20/21							
test-cata1	04/16/21							
Test Supplier Catalog 2	04/09/21							
Test Supplier	04/09/21							

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
Monitor	123456VP		100.00		USD			

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

The screenshot displays the 'Catalogs' management interface. On the left, a table lists existing catalogs, with 'Test VP1' highlighted. The main area shows the 'Test Supplier Catalog 7' in 'Draft' status. The form includes fields for Customer (Cabot Corporation), Catalog Name (Test Supplier Catalog 7), Status (Draft), Start Date, Expiration Date, and Currency (USD). At the bottom right, there are 'Save' and 'Submit for Approval' buttons. Below the main form, the 'Items Included in Catalog' section shows a table with columns for Name, Part Number, Status Change, Price, Price Change, Currency, Other Fields Changed, Reject Reason, and Actions. The table is currently empty, and the 'Load from file' button is highlighted.

Catalogs

Catalog Name	Created
Test VP1	04/21/21

Test Supplier Catalog 7 Edit [Back](#)

Customer: Cabot Corporation

* Catalog Name: Test Supplier Catalog 7

Status: Draft

Start Date: mm/dd/yy date when catalog prices become effective

Expiration Date: mm/dd/yy date when catalog prices become expired

Currency: USD

[Save](#) [Submit for Approval](#)

Items Included in Catalog

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
No rows.								

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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.couphost.com/>

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