![Air Liquide logo – creative oxygen]

**Coupa Supplier Portal (CSP)**

**Supplier Training Guide for Non Compliant Country**

**May 2020**

Shanghai • 2019
Procurement Performance Team • APAC Hub Procurement

# Agenda

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# Introduction to Coupa

# What is Coupa?

Air Liquide has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic Purchase Order and Invoice (Except Air Liquide China Suppliers) transmission.

- Coupa is a leading e-Procurement platform, connecting buyers with their suppliers.
- "Coupa is an internet-based solution capable of accommodating a variety of different systems." (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by Air Liquide to request indirect materials and services, as well as create and communicate Purchase Orders.
- The Coupa Supplier Portal (CSP) is <u>free</u>. There is no cost for suppliers.

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# How Will You Benefit?

By working with Air Liquide electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, be able to maintain a better presence with Air Liquide.

- Efficient Purchase Order receiving and acknowledgement
- Instant visibility to Purchase Order details
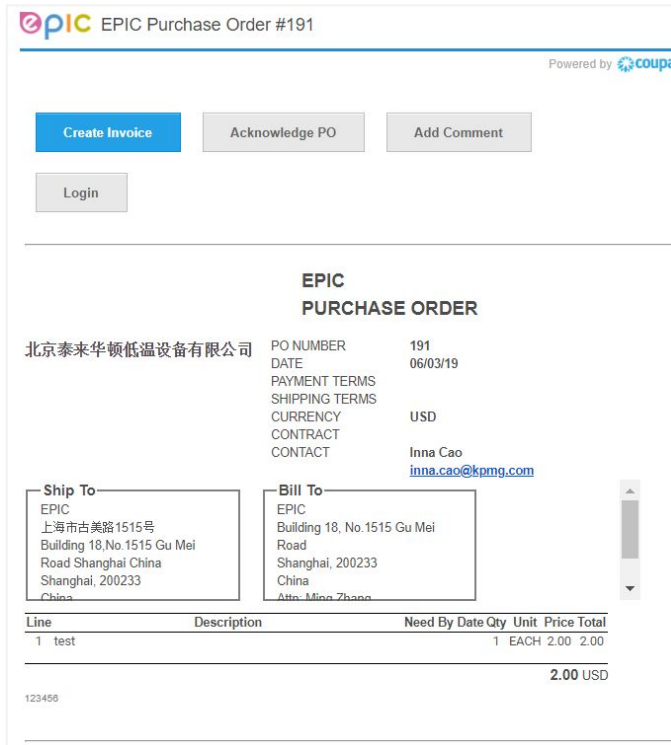- Reduced manual paper transaction processing

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# One System, Two Interaction Methods

As a supplier, you have two ways in which you can electronically interact with Air Liquide:

### 1. Through Supplier Actionable Notification (SAN)/Email
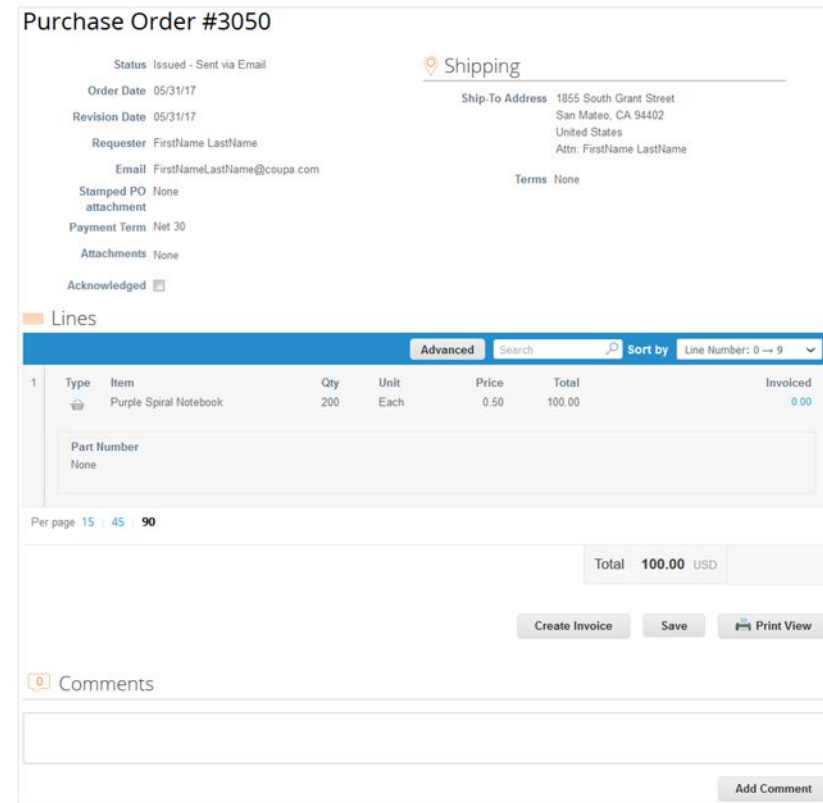
### 2. Through Coupa Supplier Portal (CSP)



OR

# Registration and Setup

# Transactions in Coupa Via CSP

- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and create electronic invoices via online platform.

- As a Supplier, you will have the ability to :

  1) Manage your company information

  2) Configure your PO and invoice transmission preferences

  3) Create an online catalog

  4) View all of your purchase orders

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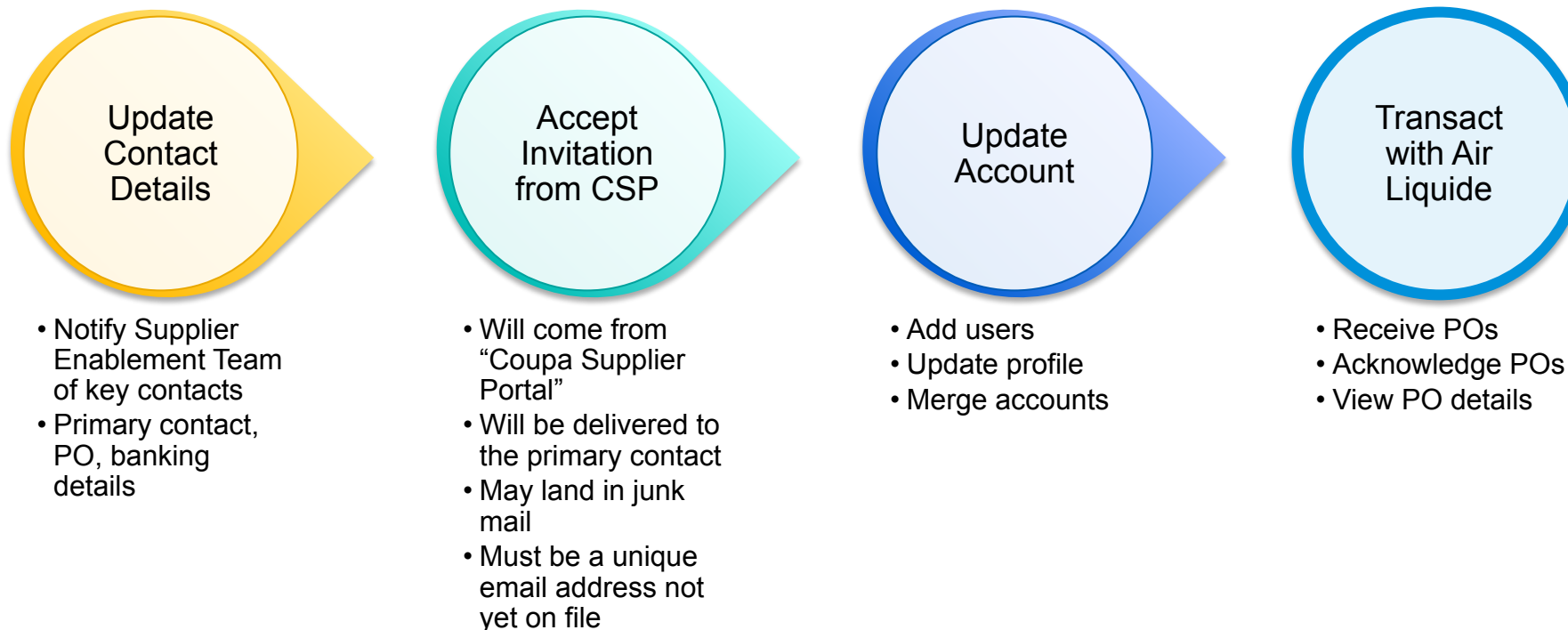Procurement Performance Team • APAC Hub Procurement                                                   EPIC
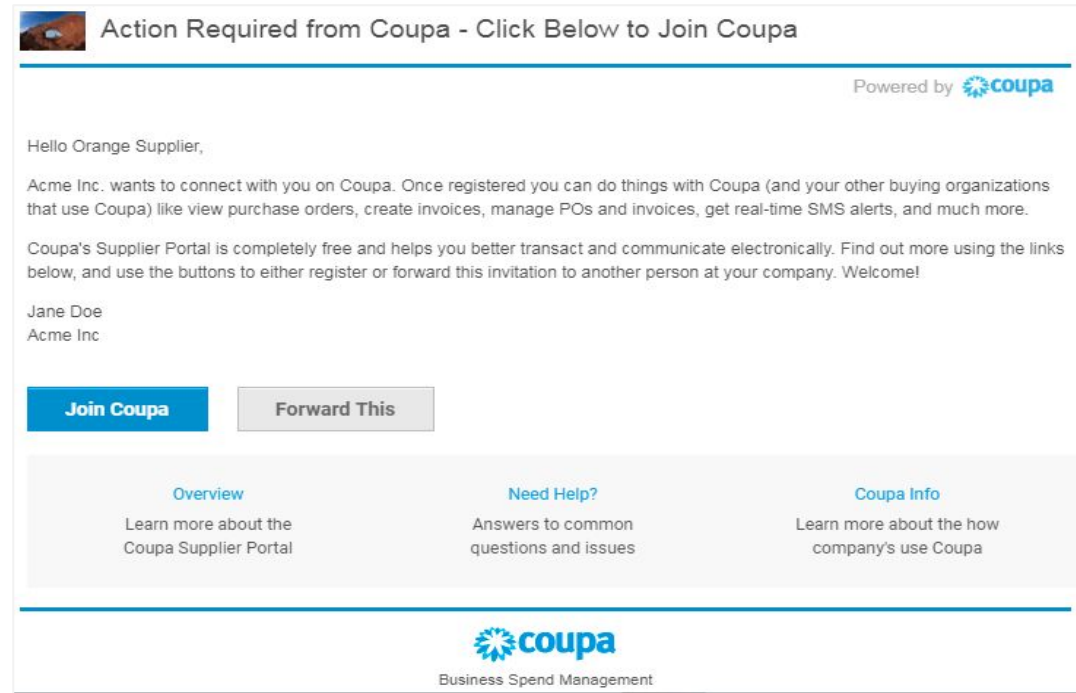
# Connection to Air Liquide via Coupa

It is imperative that all suppliers connect to the Coupa platform to transact with Air Liquide successfully. Each of the below steps must happen before a supplier can properly interact with Air Liquide:

**Update Contact Details**

- Notify Supplier Enablement Team of key contacts
- Primary contact, PO, banking details

**Accept Invitation from CSP**

- Will come from "Coupa Supplier Portal"
- Will be delivered to the primary contact
- May land in junk mail
- Must be a unique email address not yet on file

**Update Account**

- Add users
- Update profile
- Merge accounts

**Transact with Air Liquide**

- Receive POs
- Acknowledge POs
- View PO details

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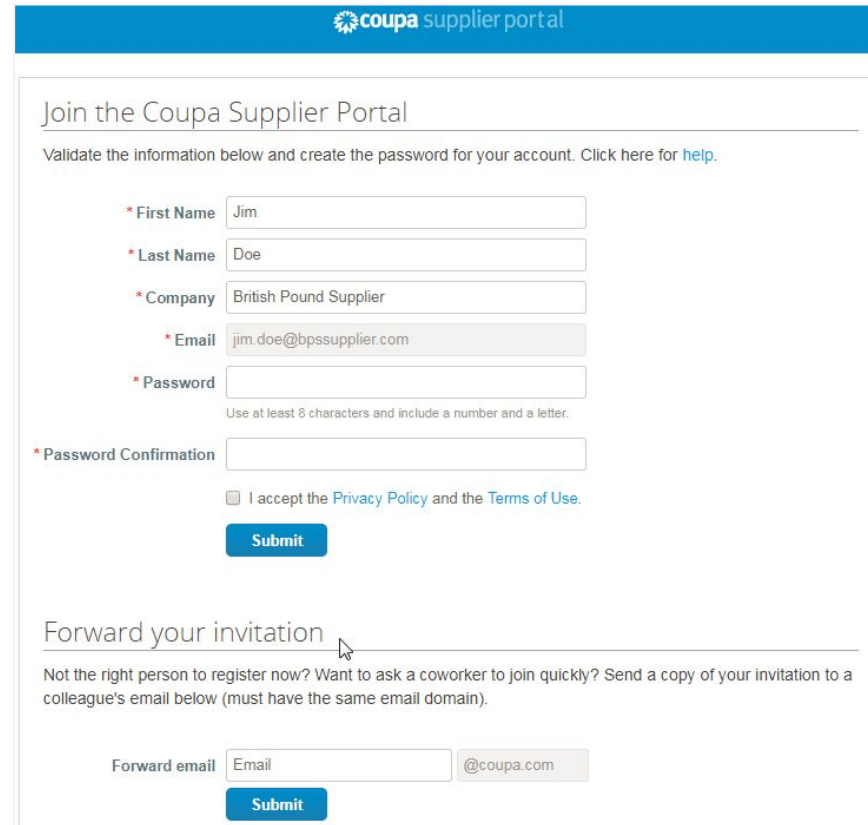# How to join Coupa Supplier Portal (CSP)? (1/2)

Below is a sample of the invitation letter that will come from Coupa Supplier Portal. Please alert your team to keep a look-out for this invitation and act upon it when it is received. Be sure to click only on the direct link at the bottom of the email invitation for CSP account registration.



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# How to join Coupa Supplier Portal (CSP)? (2/2)

You will automatically be redirected to the Coupa Supplier Portal account-registration page upon clicking on the direct link in your email invitation:

Complete the required remaining information to register your linked CSP account.



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# Manage Account

- Once, you click the emailed link and sign up for the CSP, you can manage your account information.

- Click on your **user** and **Account Settings**.

- Edit your **first name**, **last name**, **email\*** and **password**.

(*Email can't be changed. If you want to change it, you have to create a new CSP account and connect it to your company.)



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# View and Manage Notifications

- On the **Notification Preferences** page, you will be able to select notifications you want to receive as well as the channel where you want to receive the notification: **online** (to do list) - recommend, **email** - recommend, or **SMS\*** (short text message).

(*You can choose to receive notifications in short text messages only if you have an SMS-capable device and you validate your phone number. SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. You can verify your mobile phone for SMS notification receiving on **Security and Two-Factor Authentication** page.)



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# Updating Supplier Profile

- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Profile information.

- Select **Profile** from the top menu bar.

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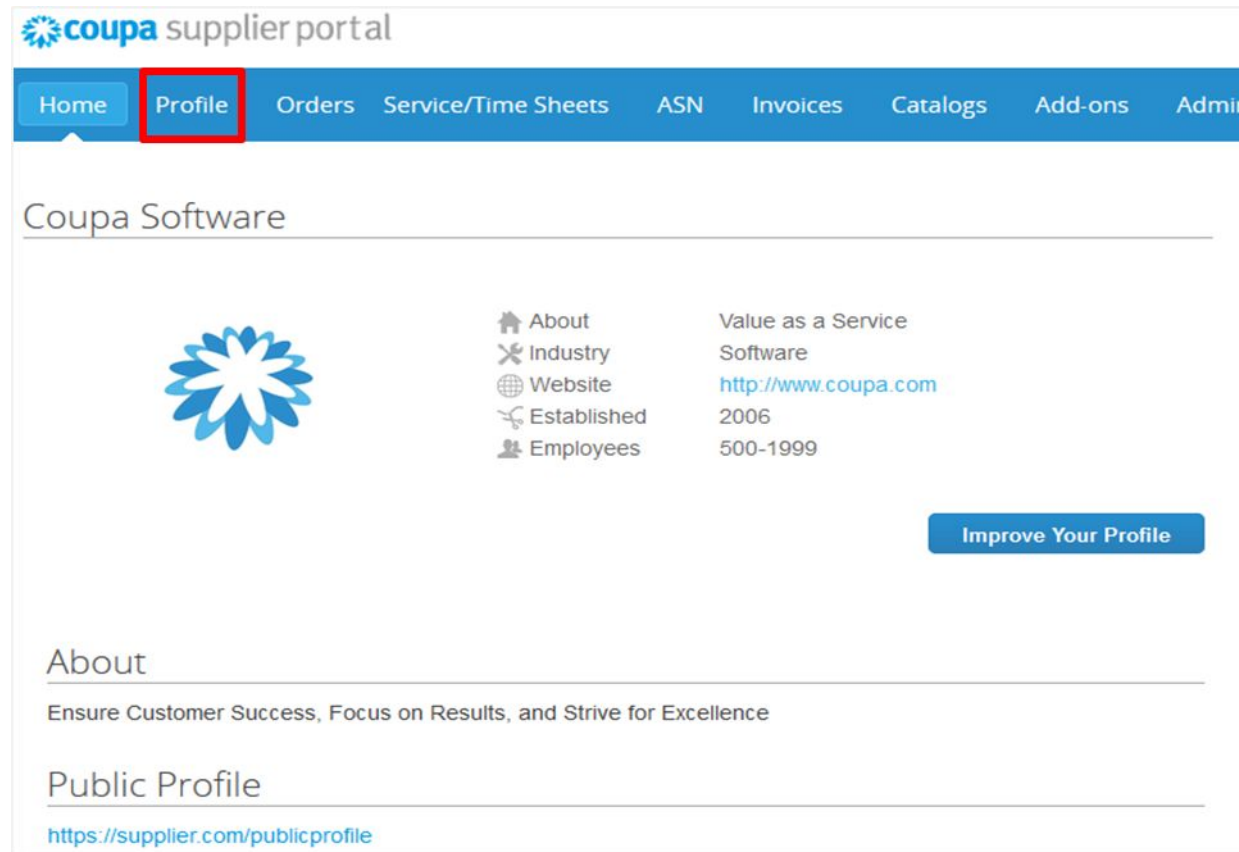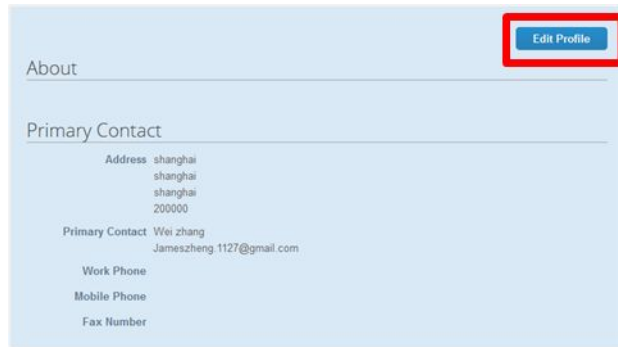
# Completing Public Profile

**Edit Company Info.**

## To start, complete your Public Profile*:

(*Public profile is what other Coupa customers, aside Air Liquide, can see about your company on the CSP.

You can also edit specific profile for one customer, but **information in the profile will not be transferred to Air Liquide system**.)

- Select **Profile** from the top menu bar
- Click **Edit Profile**
- Confirm existing company information and complete any missing fields in at least the **General Information, Address, Primary Contact** sections (**Required fields are marked with an asterisk)**
- Click **Save** when finished

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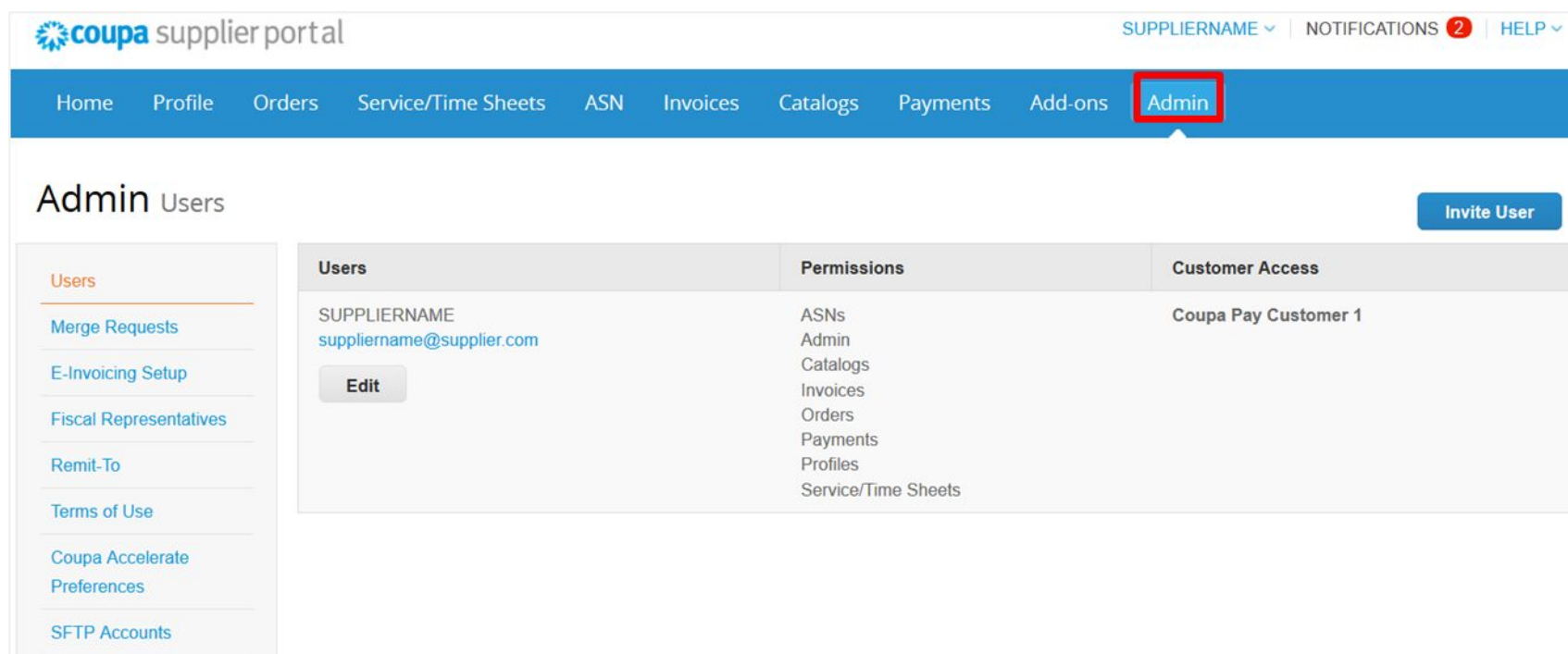
# Updating the Admin Settings

- Once, you click the emailed link and sign up for the CSP, you can manage and update your Admin information.
- Select **Admin** from the top menu bar.

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# Adding Users

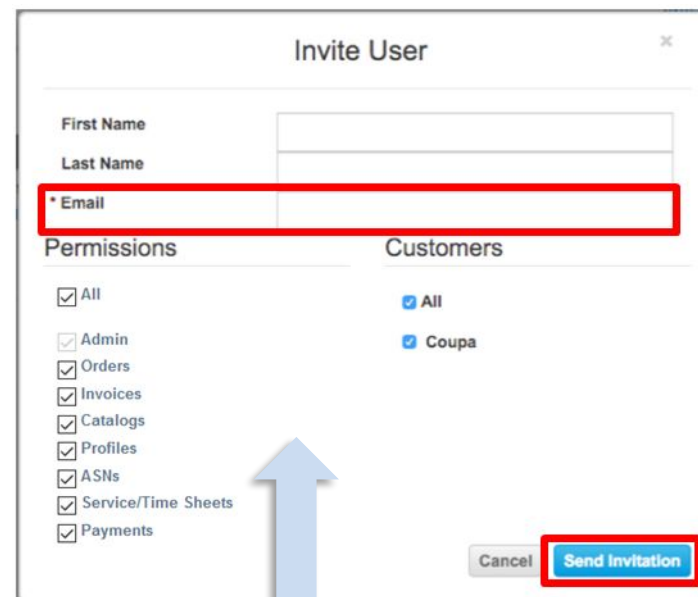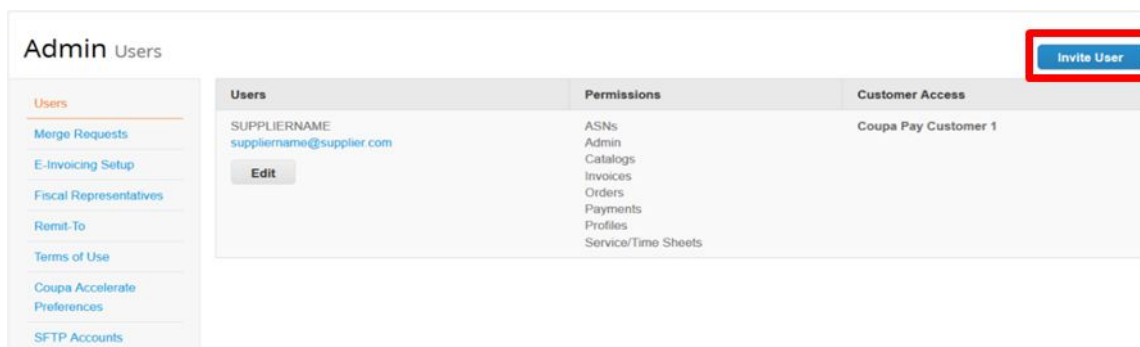**Add Users**

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

(*You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.)

- From the top menu bar, select **Admin**, 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** and **permissions** by checking/unchecking customer name boxes and permission boxes in the user table

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# Editing Users

**Edit Existing Users**

**You can edit and manage individual user access at any time:**

▪ From the top menu bar, select **Admin**, then click **Edit** under the desired User's name

▪ Modify the specific permissions and customer access by checking/unchecking respective boxes in the popup window user table

▪ Click **Save** when finished

▪ For auditing purposes, Coupa doesn't allow users to be deleted. You can **deactivate** a user when you no longer want that user to be able to access the account. You can also **reactivate** users later.

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**Purchase Orders**

# Email and CSP are Linked

- You will be notified of the status of your Purchase Order via email.

- You can click **View Order** in the acknowledgement email to check the order in the Coupa Supplier Portal.

# Receive & View Orders (1/2)

- Regardless of the PO delivery preference set, you will have access to POs within CSP.

- Select **Orders** from the top menu bar.
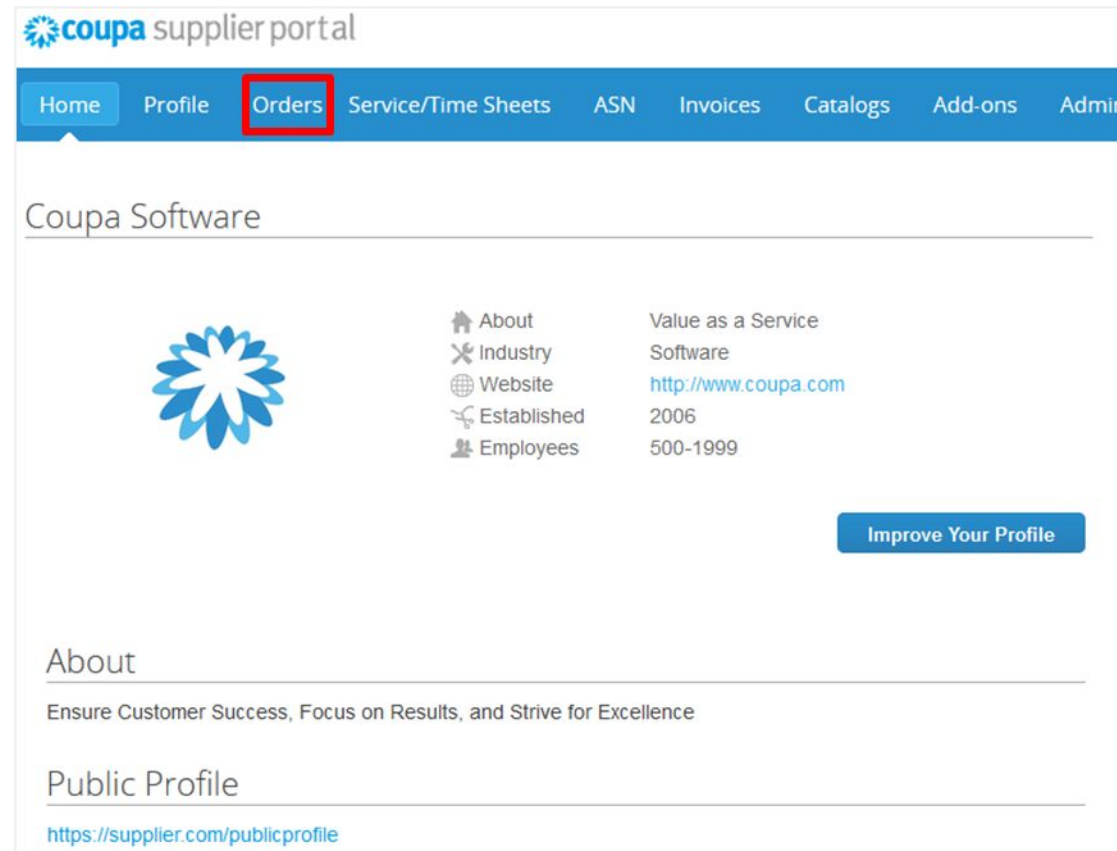
# Receive & View Orders (2/2)

- A **Purchase Orders** screen will display and show all purchase orders sent by Air Liquide.

- To find purchase orders, you can use the **Search** functionality. You can also sort by column headers by clicking on any of the column headers (**PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions**).

- In addition, as you start to receive multiple purchase orders, you can use the **View** functionality to filter the purchase orders.

- All purchase orders on this screen are hyperlinked, and you can view additional information about the purchase order by clicking on that blue hyperlink, i.e. **PO Number**.

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# Acknowledge Orders

- The page refreshes to display the PO details and shipping address.
- Click the **Acknowledged** checkbox to notify the customer whose PO you have received. Air Liquide can also see the statue update.

(*If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address)

- You can also attach supporting document in **Supplier Attachment** field, and click on **Save**. Air Liquide can also see documents you attached.
- You can print the PO in PDF version by clicking **Print View**.
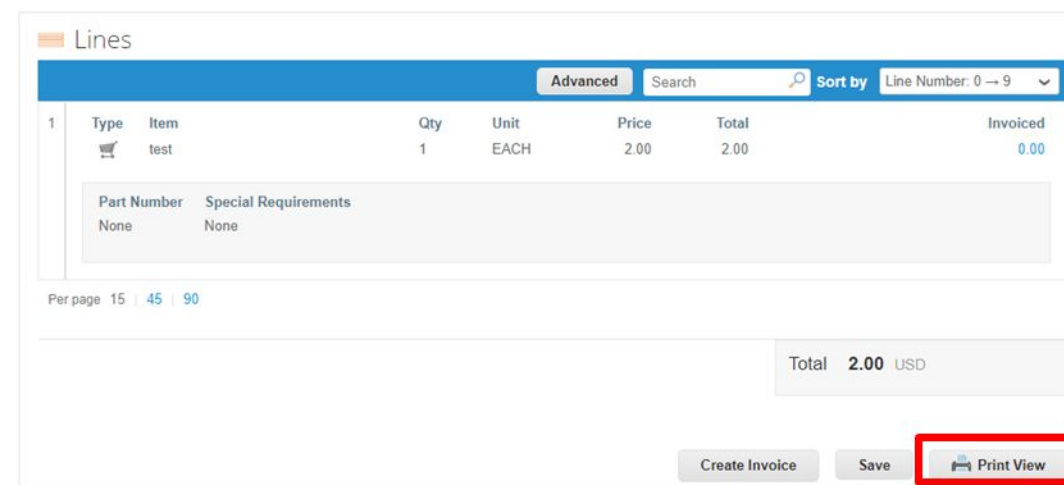
*PO view screen continued*

- Suppliers can check the status of the invoice by creating a view from the dropdown in the invoice tab by adding "Paid" and "Payment Information" columns.
- Until invoice is fully paid, the status will show "No". However, partial pay information will is still visible to suppliers as highlighted above.

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**Support**

**Support**

# Additional Resources

The purpose of this training is to review best practices and provide a training overview for working with Air Liquide via Coupa. This group will not be addressing other potential areas of interest, such as Coupa punch-out.

- **Air Liquide page:** https://www.airliquide.com/cn/china/gong-ying-shang

- ☐ CSP Guide
- ☐ Quick Guide
- ☐ SAN/Email Guide
- ☐ Videos
- ☐ FAQ

- **General Information for Coupa Supplier Portal (CSP):** https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

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

- **Supplier Enablement:** If you have any question or any willingness to set up a punch-out or supplier hosted catalog, please contact Air Liquide's Coupa Procurement Team below : cnproc-public@airliquide.com

- **Legacy POs should continue to be processed using your legacy (pre-Coupa) process**

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# Status List

Below lists all of the PO, Invoices and Catalog statuses in Coupa Supplier Portal (CSP):

| POs Statuses | |
|---|---|
| **Status** | **Description** |
| Buyer Hold | The PO is approved but pending buyer review. |
| Cancelled | The PO is cancelled and doesn't need to be fulfilled. |
| Closed | The issued PO was received and then closed, either manually or automatically within Coupa. |
| Currency Hold | The PO is on hold due to a currency exchange rate issue. |
| Error | There's something wrong with the PO. Contact your customer to get the PO back on track. |
| Issued | The PO was approved and sent to you. |
| Soft Closed | The PO is closed but can be reopened. You cannot invoice against a PO in this status. |
| Supplier Window Hold | The PO was approved outside of the order window schedule under contract terms. |

| Catalogs Statuses | |
|---|---|
| **Status** | **Description** |
| Draft | The catalog has been created, but may be missing information necessary to send it to the customer. |
| Awaiting/ Pending Approval | The catalog has been received by your customer, but it has not gone through the approval chain yet. |
| Accepted | The catalog has been accepted by your customer, and all the items in it are now available for purchase within Coupa. |
| Rejected | The catalog has been rejected. Contact your customer to find out why, and then resubmit. |
| Error | There's something wrong with the catalog. Contact your customer to get the catalog back on track. |

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# Coupa Supplier Quick Start Guide

## Quick Start Guide - Supplier

### Introduction

You will find the Coupa Supplier Portal; very easy to use. This guide will help you to create a catalog, view POs and create Invoices.

### Signing-in

1. Activate your account: You should have received an email invitation to join the Coupa Supplier Portal . Follow the instructions provided. You can also register directly on https://supplier.coupahost.com
2. Reset your account: If you have forgotten your username or password, click on the link at the bottom of the Sign In screen.

### Edit Your Company Info

The first thing you should do is complete your Public Profile. Select the Company Info tab and click Edit. Ensure all mandatory fields are filled in then click Save.
Your public profile is visible to ALL Coupa customers, not just customers with whom you are connected.

Add users:
You can add users to access your supplier account and perform all tasks:
1. Under Company Info, select User Accounts. Then click on Invite an Employee.
2. Enter the employee's email address in the text box provided and click on Send Invitation. They will receive an email with instructions to activate their account.
3. ☑ You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
4. ⊖ You can delete a user by clicking on the Delete icon under the Actions column.

⚠ When enabled for a given customer, a user can access all POs and create Invoices for that customer.

### Configure Customers

Settings for PO delivery Option and Punchout are maintained individually for each customer. You can also setup specific customer profiles:
1. Click on the customer tab (labeled with your customer's name).
2. Edit the information under the Profile section. You can select to compare with other profile to easily copy information across.

Set PO Delivery Preference:
1. Under the customer name tab, select PO Delivery.
2. Enter your Email or cXML configuration details. You will still be able to view POs on the CSP.

Configure Punchout Site:
1. Under the customer name tab, select Punchout.
2. Enter the customer Punchout configuration details. It will be effective immediately.

⚠ If your customer chooses to receive updates, this information is automatically propagated to the customer's Coupa environment.

### View Orders

Regardless of the PO delivery preference set, you will also have access to POs within the Coupa Supplier Portal . To view customer orders:
1. Select the customer name tab, then click on Purchase Orders.
2. 2711 Click on the PO# to view the PO.
3. ☑ To acknowledge a PO, tick the Acknowledged check box.
4. You can print the PO by clicking on Print View.

### Create Invoice

**Not enabled for Air Liquide China suppliers**

### Manage Catalogs

In order for your customers to buy products or services from you, you need to have an agreed Catalog in place.

1. ⊕ Create Catalog: Click on the customer tab and select Catalogs. Click on Create. You can set start and expiry dates.
2. Sumit Catalog: When you have included all the items required click on Submit to buyer. This automatically sends a notification to the buyer to review the catalog and approve. You can view the status in realtime in the Catalogs view. Once the catalog is approved, your products and services are immediately available to your customer's employees.

### Tips

Creating Invoices

**Not enabled for Air Liquide China suppliers**

Managing Catalogs
- Once a catalog is accepted, it cannot be edited. You can create and submit new catalogs to reflect changes in price or product/service offering.

Does your company have more than one CSP account? Merge them!
- On you Home page you will see a list of accounts that you can request to merge. Click on Merge. Add a comment in the text box (this will be sent to the other account's owner) and then click Send Request. Have the other account owner log in and on their Home page, click on Merge then Accept on the next screen.

MORE INFORMATION
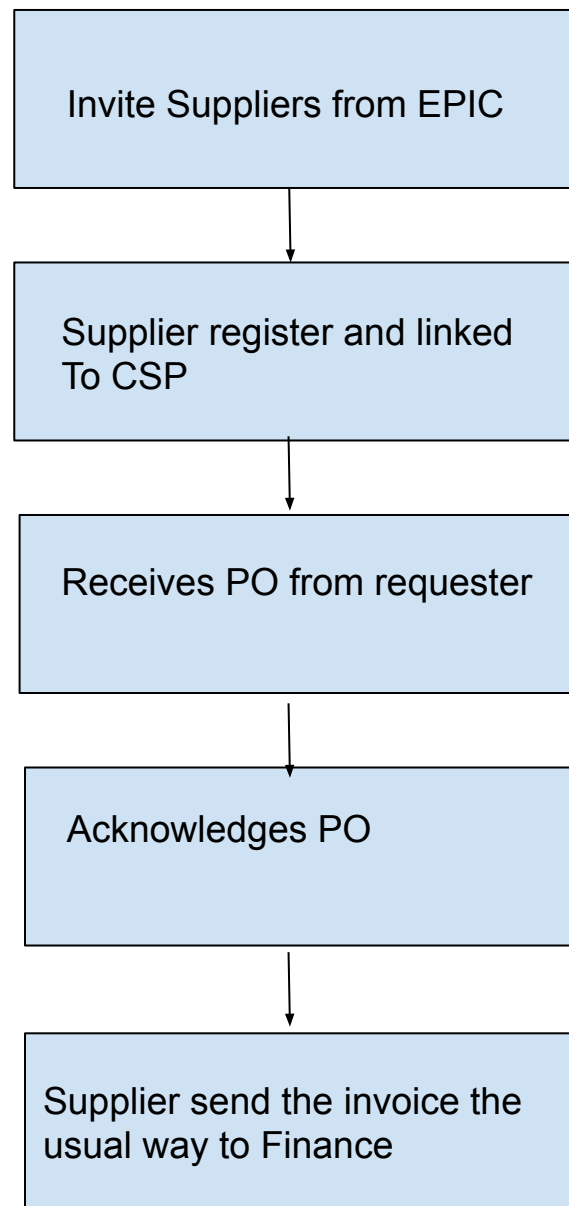For more resources, visit the Coupa Online Training

❋ coupa

# Summary

- Coupa centralizes Air Liquide's procure-to-pay processes and practices, providing our strategic supplier relationships bringing about additional several benefits.

- Suppliers online capabilities have been expanded: Receive/acknowledge Purchase Orders, and create hosted catalogs (if enabled on CSP).

- Supplier expectations: Working online (no paper) to review and acknowledge Purchase Orders, ensure that purchase order information can be directly corresponding to the invoice.

- When the purchase order amount matches the receipt amount and the invoice amount, the invoice will be automatically paid (according to the payment method set by Air Liquide); no follow-up action by Air Liquide staff is required (to ensure the timeliness of payments).

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Invite Suppliers from EPIC

↓

Supplier register and linked
To CSP

↓

Receives PO from requester

↓

Acknowledges PO

↓

Supplier send the invoice the
usual way to Finance

# Thank You!

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