

COUPA SUPPLIER TRAINING MATERIAL

22nd March 2019

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Coupa via CSP	View and manage POs Create, view, and manage ASNs Create and manage a catalog and items Create and manage a service/timesheet View and respond to sourcing event	<u>18</u>
Administration	Configure PO delivery method Update Supplier Profile Manage Users and Merge Requests View Remit-to information	<u>41</u>
Wrap-Up	Key Takeaways Next Steps Q&A	<u>49</u>

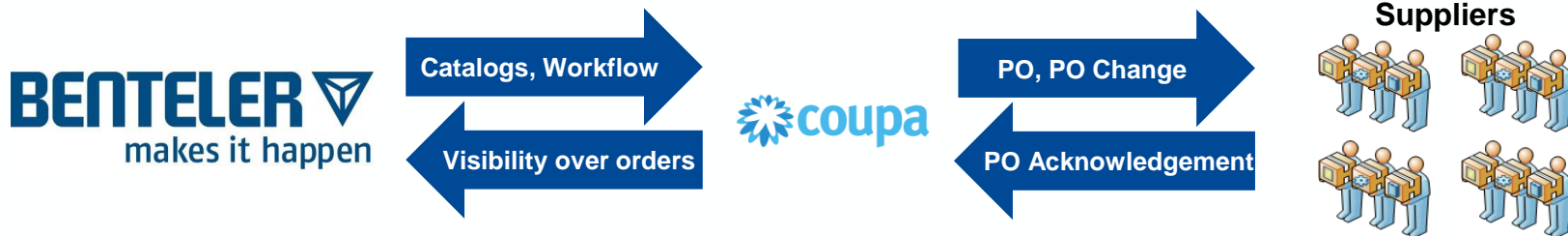
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WHY COUPA?

BENTELER has selected Coupa as the technology platform to digitize and standardize the Purchase-to-Order processes and enable electronic transactions.

- Coupa is a leading e-Procurement platform that connects buyers with suppliers
- BENTELER will use the Coupa Supplier Portal (CSP) to request supplier catalogs, accelerate the update of supplier master data and to create and communicate purchase orders
- Paperless, real-time order management in Coupa offers less risk of manual errors, increased efficiency, and better transparency throughout the ordering process
- The Coupa Supplier Portal (CSP) is free of charge for suppliers



HOW WILL YOU BENEFIT FROM THIS?

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

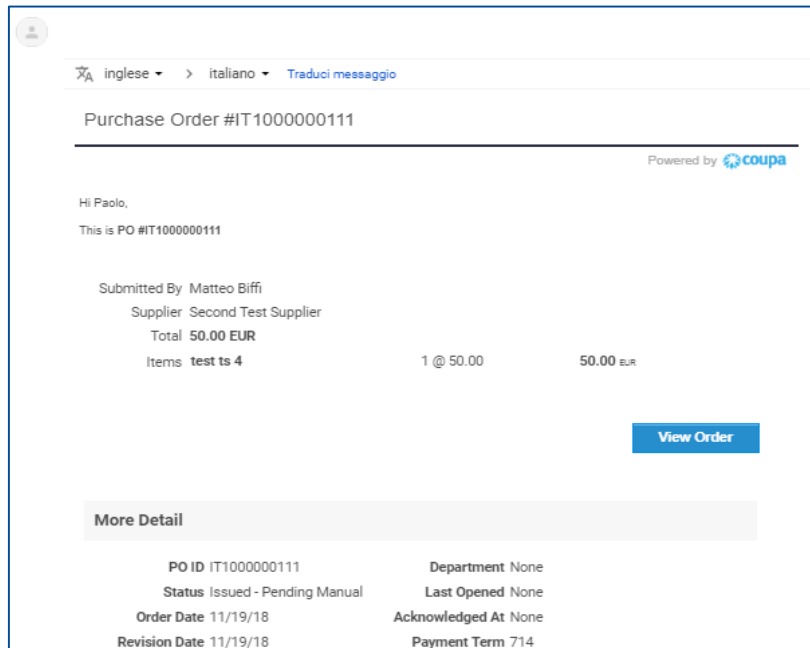
- Instant visibility into Purchase Order status
- Reduced manual transaction processing – no paper or fax
- One central place to receive orders
- One system to get in contact with BENTELER
- One platform to update your catalogs




ONE SYSTEM, TWO INTERACTION METHODS

As a supplier, there are several ways you can electronically interact with Benteler:

via Email Flip...



Purchase Order #IT1000000111
 Powered by 

Hi Paolo,

This is PO #IT1000000111

Submitted By: Matteo Biffi
 Supplier: Second Test Supplier
 Total: 50.00 EUR

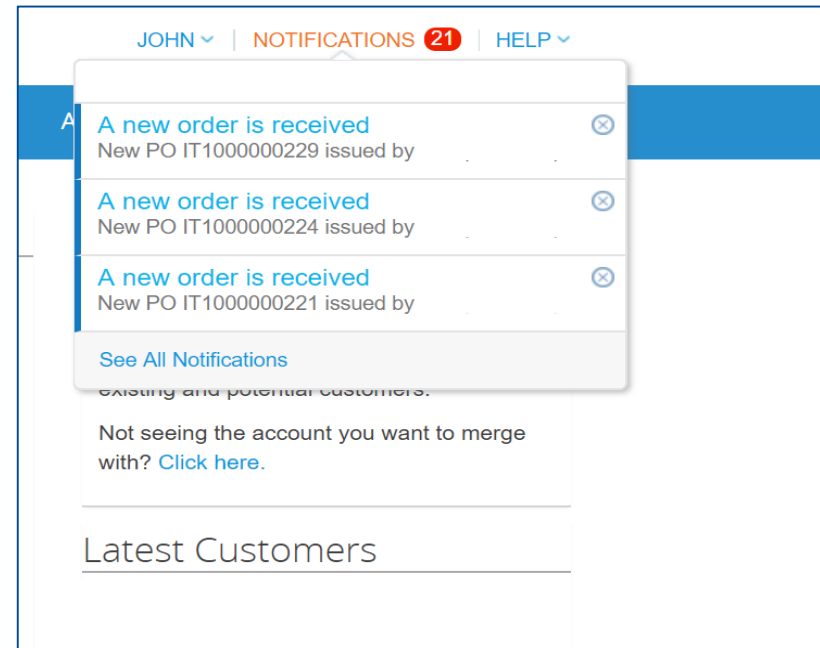
Items	test ts 4	1 @ 50.00	50.00 EUR

[View Order](#)

More Detail

PO ID IT1000000111	Department None
Status Issued - Pending Manual	Last Opened None
Order Date 11/19/18	Acknowledged At None
Revision Date 11/19/18	Payment Term 714

via Coupa Supplier Portal (CSP)...



JOHN | NOTIFICATIONS 21 | HELP

A new order is received
 New PO IT1000000229 issued by

A new order is received
 New PO IT1000000224 issued by

A new order is received
 New PO IT1000000221 issued by

[See All Notifications](#)

existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

Latest Customers

... and Purchase Orders via cXML

ADVANTAGES OF THE COUPA SUPPLIER PORTAL

As we adopt Coupa, we encourage our suppliers to adopt the Coupa Supplier Portal (CSP).

- This free tool enables suppliers to easily do business with BENTELER and other Coupa customers.
- Use of the CSP allows you to manage content and settings on a customer-by-customer basis, including:
 - View and acknowledge Purchase Orders
 - Manage your company information
 - Set your purchase order transmission preferences
 - Create and manage online catalogs

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RECEIVING ORDERS VIA EMAIL OVERVIEW

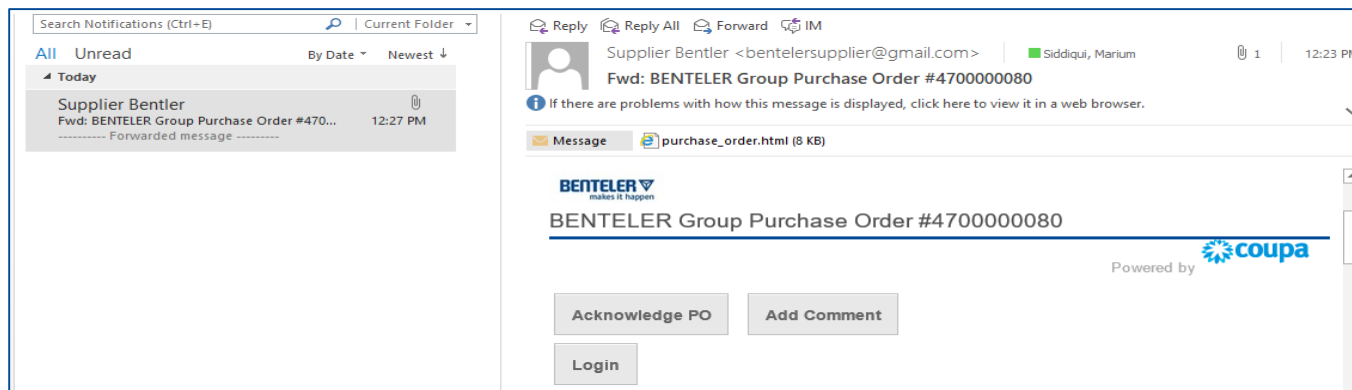
- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs
- As the Supplier you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons to enable you to Acknowledge PO or Add Comment to the PO
- There is no need for suppliers to sign in to another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



RECEIVE A PURCHASE ORDER VIA EMAIL



- If the Supplier email address is added in the Benteler system, the PO will be automatically emailed directly to you
- Purchase Orders will show up as Coupa Notifications in your inbox
 - POs will be issued to a PO email address confirmed by the supplier and not to the primary contact email address (unless they are the same). Contact Benteler if unsure which email you currently have on file, or if you need to update



ACKNOWLEDGE A PURCHASE ORDER VIA EMAIL

(1/2)

View the PO information and click on the **Acknowledge PO** tab to notify Benteler that you have acknowledged the order.

Acknowledge PO

Add Comment

BENTELER Group
PURCHASE ORDER

PO NUMBER 4700000080 / 0032 / 010
 DATE 22/03/2019
 PAYMENT TERMS C003 -Payment against documents
 SHIPPING TERMS
 CURRENCY EUR
 CONTACT Stefan Loechner
SLoechner@kpmg.com
 CONTACT BUYER Stefan Loechner

LAST APPROVER
 ERS FLAG No

Ship To
 BENTELER Group
 Adam-Opel-Straße 99
 Eisenach, 99817
 Germany
 0032
 Attn: Stefan Loechner

Bill To
 BENTELER Group
 ADAM OPEL STRASSE 99
 EISENACH, 99817
 Germany
 Attn:

Line (Item-, Supplier material number)	Delivery Date	Qty	Unit Price	Total (net)
1 Z4 Workstation (Linux) 3WQ14EC	30/04/2019	1	Piece 1,313.00	1,313.00
				1,313.00 EUR


Montage

Vor der Arbeitsaufnahme hat sich der Aufsichtsführende bei der entsprechenden Betriebsabteilung zu melden, zur Information und Abstimmung über mögliche Gefahren bei der auszuführenden Arbeit.

ACKNOWLEDGE A PURCHASE ORDER VIA EMAIL

(2/2)

Coupa will open in a new browser tab or window. You will see the message “Order Acknowledged” at the top of the screen.

 Sign Out

Purchase Order #4700000080

Order acknowledged

X

Status Issued - Sent via Email

Order Date 03/22/19

Revision Date 03/22/19


Requester Stefan Loechner

Email SLoechner@kpmg.com

Payment Term C003 -Payment against documents

Attachments None

Acknowledged ☒

 **Shipping**


Ship-To Address Adam-Opel-Straße 99
99817 Eisenach
Germany
Location Code: 0032
Attn: Stefan Loechner

Terms None

SOURCING EVENT: RFQ (1/3)

Benteler invitation text needed

- Coupa will also be used by Benteler to run RFQs (sourcing events). In this case Benteler will invite its suppliers to respond to RFQs via Coupa Supplier Portal
- In this case you will receive an email inviting you to participate in the event
- Click on the **View Event** button to access the Coupa Supplier Portal and view the event details

Powered by 

MyCompany has invited you to the sourcing event: **Test Event**

MyCompany

If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Questionnaires, and Items and Lots.

Response due date: Thursday, 17 January 2019 05:00 PM CET

Want to participate later?
Click **I intend to Participate** button to let the buyer know.

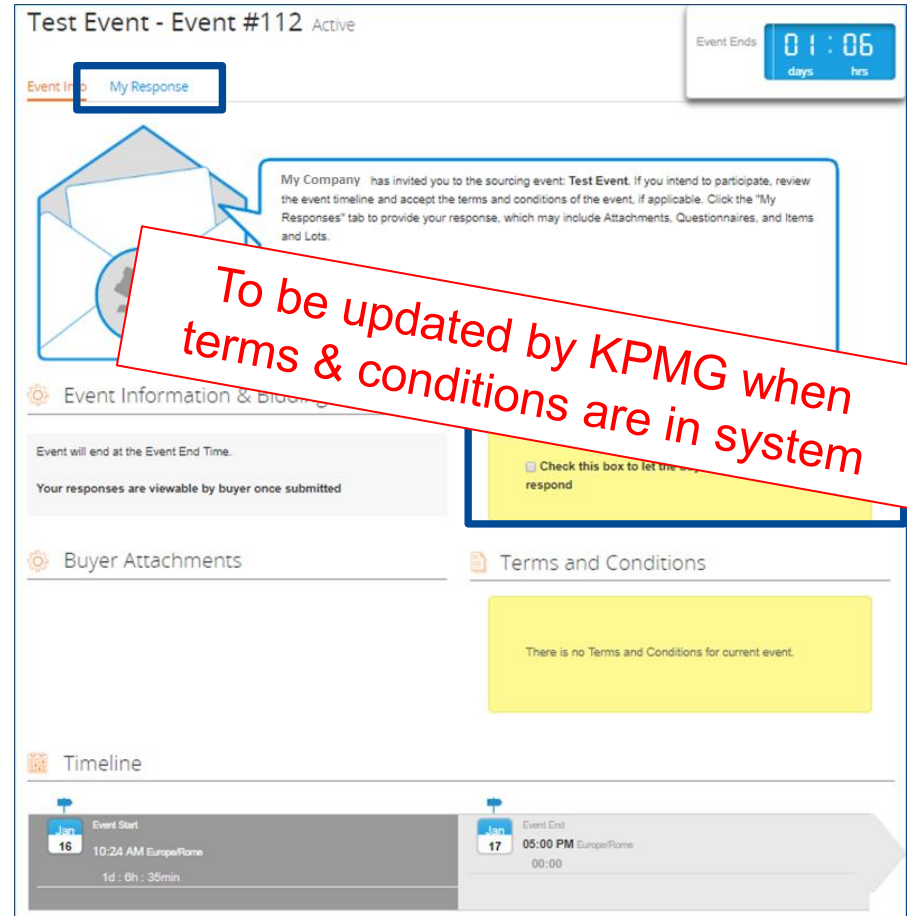
Need more info?
Click **View Event** and you will be taken to the event page.

I intend to Participate **View Event**

All questions should be asked using the event message board (bottom left of the event). Having technical issues? Contact sourcing_support@coupa.com

SOURCING EVENT: RFQ (2/3)

- You can view the details of the sourcing event from this page
- By ticking the box under **Intend to Respond** labelled “Check this box to let the buyer know you intend to respond,” you will inform the Buyer that you will participate in the sourcing event
- At the bottom of the page, you can see the timeline for the event
- Click on **My Response** tab to enter your RFQ response



Test Event - Event #112 Active

Event Ends 01:06 days hrs

Event Info My Response

My Company has invited you to the sourcing event: Test Event. If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Questionnaires, and Items and Lots.

To be updated by KPMG when terms & conditions are in system

Event Information & Blocking

Event will end at the Event End Time.

Your responses are viewable by buyer once submitted

Check this box to let the buyer know you intend to respond

Buyer Attachments

Terms and Conditions

There is no Terms and Conditions for current event.

Timeline

Event Start 10:24 AM Europe/Rome 1d : 0h : 35min

Event End 05:00 PM Europe/Rome 00:00

SOURCING EVENT: RFQ (3/3)

- In the “My Response” tab you can access further details of the RFQ
- This is also where you will enter the price for your offer
- By clicking the “**Submit Response to Buyer**” button, you will send your response to Benteler

Test Event - Event #112 Active

Event Ends 01:06
days hrs

Event Info My Response

Attachments

Marco Sebastiano Scuto has not provided any Attachments for this event

Questionnaires

Marco Sebastiano Scuto has not provided any Questionnaires for this event

Items and Lots

Name	Expected Qty	My Price	Price x Expected Qty >
Items Not in Lots (1 items)			
Test Item	1 (Each) x	70.00	70.00 EUR
			Total 70.00 EUR

Load History Save **Submit Response to Buyer**

SOURCING EVENT: AUCTION

To be updated by KPMG

AGENDA

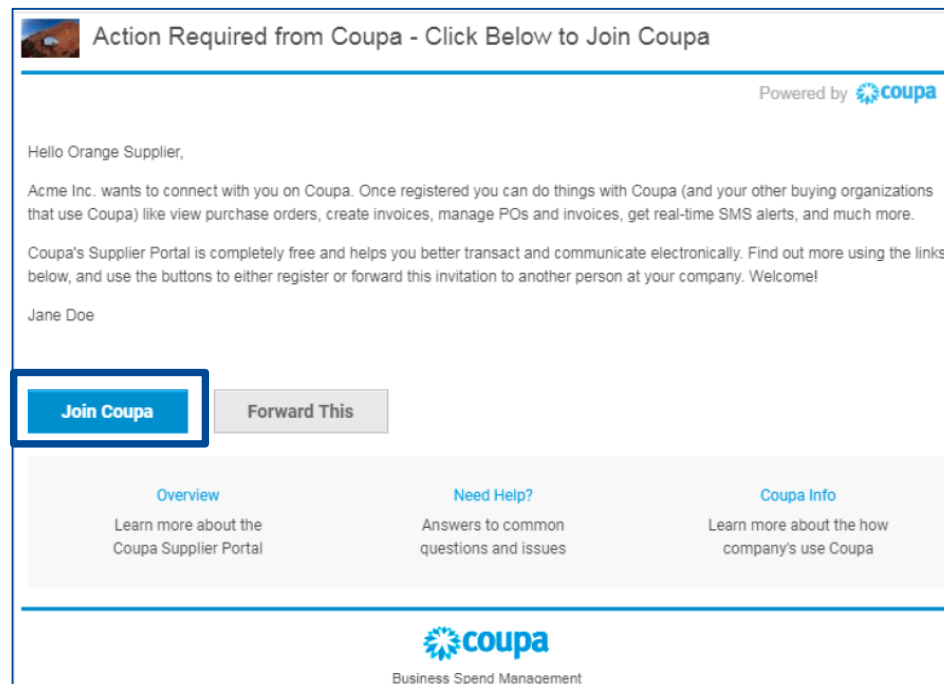
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REGISTER FOR COUPA SUPPLIER PORTAL

Benteler invitation text needed


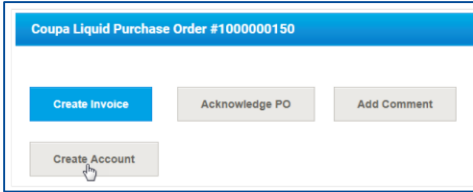
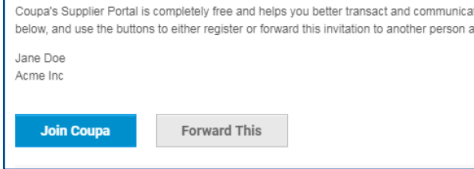
You will receive an introduction email like the one below. When you accept the invitation and create your account, you are automatically connected with Benteler.

Note: Invitations to the CSP expire after 30 days. Please take action as soon as possible after receiving the invitation.



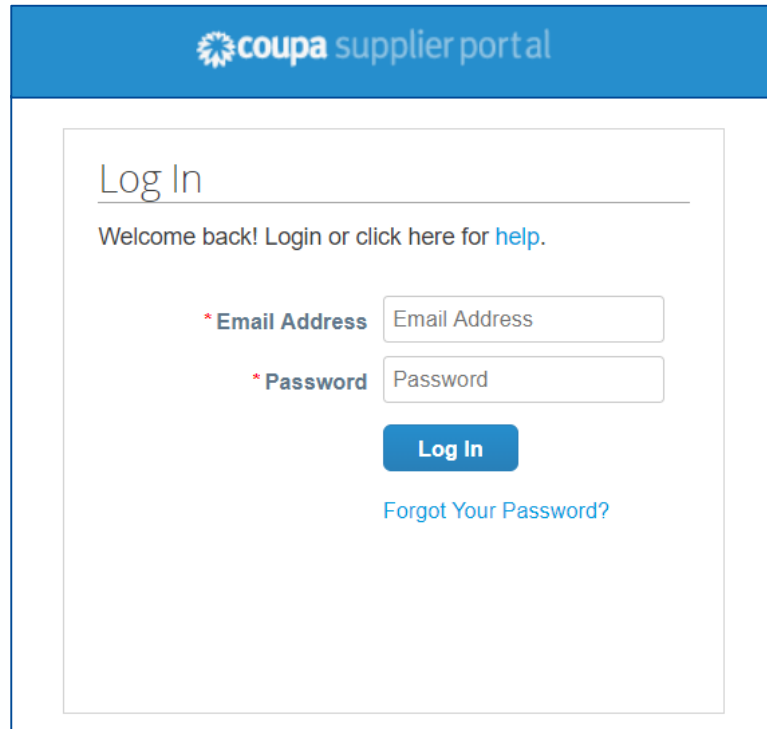
REGISTER FOR COUPA SUPPLIER PORTAL (CSP)

There are three additional ways to register for the CSP.

	Supplier-Created Invitation	Purchase Order Email	Forwarded Email
Benefits	<ul style="list-style-type: none"> You can go ahead and set up your account. Add multiple users, set up login preferences, and update your profile anytime. 	<ul style="list-style-type: none"> If you use Supplier Actionable Notifications (SAN), etc., you can create a CSP account from the PO notification without an email invitation from Benteler. 	<ul style="list-style-type: none"> Invite others in your organization by forwarding the PO notification or invitation emails. The new user is automatically linked correctly in CSP, so less effort is required than if each account were made from scratch.
Considerations	<ul style="list-style-type: none"> You connect manually to each customer. If Benteler later invites you to CSP with a different email address, you will need to merge accounts. 	<ul style="list-style-type: none"> None. 	<ul style="list-style-type: none"> The email can only be forwarded to addresses in the same domain; however, this ensures more security.
	 <p>The image shows the 'Register' page of the Coupa Supplier Portal. It includes a header with the Coupa logo and 'coupa supplier portal' text. Below the header, it says 'Register' and 'New to Coupa? Create your account or click here for help.' There are input fields for First Name, Last Name, Company, and Email (with a red asterisk indicating it is required). A 'Register' button is at the bottom.</p>	 <p>The image shows a notification for a 'Coupa Liquid Purchase Order #1000000150'. It has a blue header with the order number. Below the header, there are three buttons: 'Create Invoice' (blue), 'Acknowledge PO' (grey), and 'Add Comment' (grey). At the bottom, there is a 'Create Account' button (grey) with a mouse cursor hovering over it.</p>	 <p>The image shows an email notification from Coupa. The text says: 'Coupa's Supplier Portal is completely free and helps you better transact and communicate below, and use the buttons to either register or forward this invitation to another person at'. Below this, it says 'Jane Doe' and 'Acme Inc'. At the bottom, there are two buttons: 'Join Coupa' (blue) and 'Forward This' (grey).</p>

LOGIN TO COUPA SUPPLIER PORTAL

Access the CSP in your web browser at <https://supplier.coupahost.com/> and use your email address and password to login.



The screenshot shows the login interface of the Coupa Supplier Portal. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, the page is titled "Log In". A welcome message reads "Welcome back! Login or click here for [help](#)." There are two input fields: one for "Email Address" and one for "Password", both preceded by a red asterisk indicating they are required. Below the password field is a blue "Log In" button. At the bottom, there is a link for "Forgot Your Password?".

coupa supplier portal

Log In

Welcome back! Login or click here for [help](#).

* Email Address

* Password

Log In

[Forgot Your Password?](#)

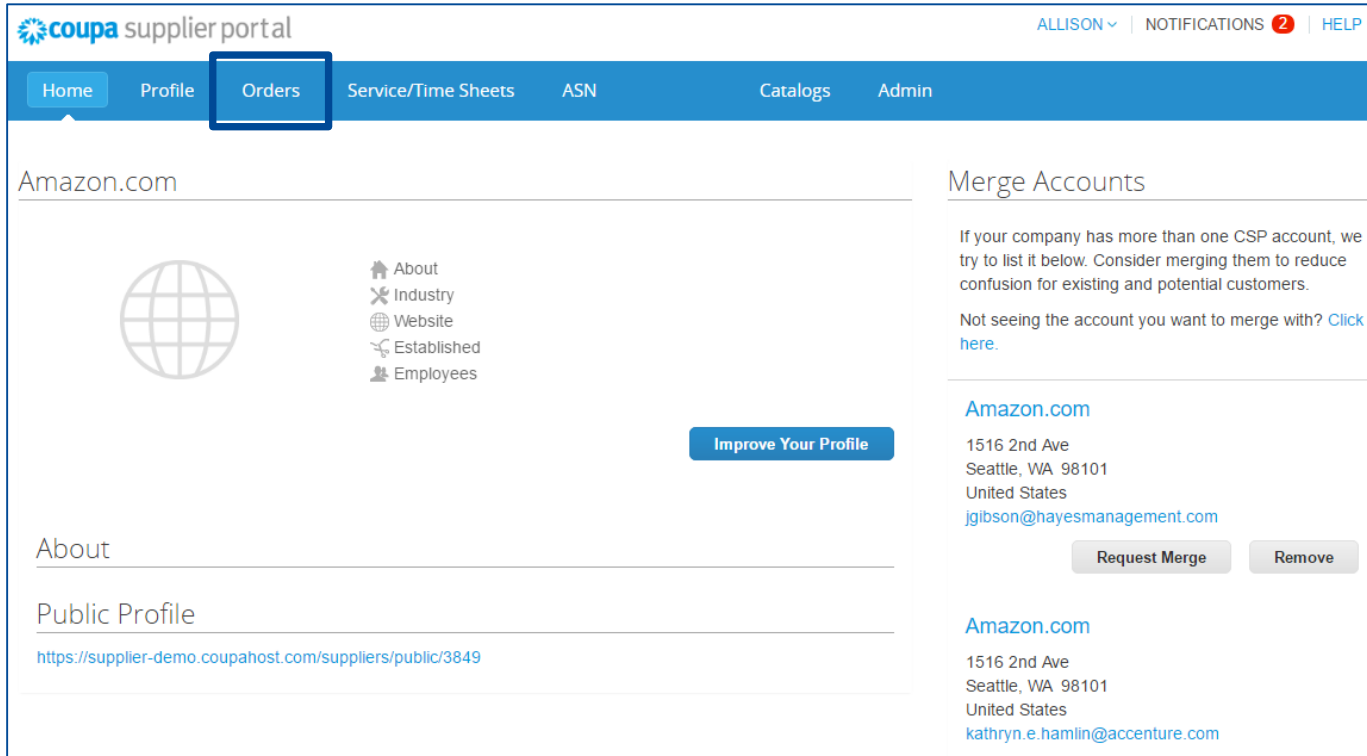
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PURCHASE ORDERS

VIEW PURCHASE ORDERS IN CSP (1/2)

- Regardless of the PO delivery preference set, you will have access to POs within the CSP
- Click **Orders** on the Menu bar



The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal' text, followed by user information 'ALLISON', a notifications bell icon with a red '2', and a 'HELP' link. Below the header is a blue navigation bar with several menu items: 'Home', 'Profile', 'Orders' (which is highlighted with a blue box), 'Service/Time Sheets', 'ASN', 'Catalogs', and 'Admin'. The main content area is divided into two columns. The left column is titled 'Amazon.com' and features a globe icon, a list of links (About, Industry, Website, Established, Employees), and an 'Improve Your Profile' button. Below this, there are sections for 'About' and 'Public Profile' with a URL: 'https://supplier-demo.coupahost.com/suppliers/public/3849'. The right column is titled 'Merge Accounts' and contains a paragraph explaining the purpose of merging accounts, a link 'Click here.', and a list of accounts. The first account listed is 'Amazon.com' with address '1516 2nd Ave, Seattle, WA 98101, United States' and email 'jgibson@hayesmanagement.com', accompanied by 'Request Merge' and 'Remove' buttons. The second account is also 'Amazon.com' with the same address and email 'kathryn.e.hamlin@accenture.com'.

VIEW PURCHASE ORDERS IN CSP (2/2)

- 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 desired PO


coupa supplier portal ALLISON ▾ NOTIFICATIONS **2** HELP ▾
















Home Profile **Orders** Service/Time Sheets ASN Catalogs Admin

Orders Order Lines

Configure PO Delivery

Purchase Orders

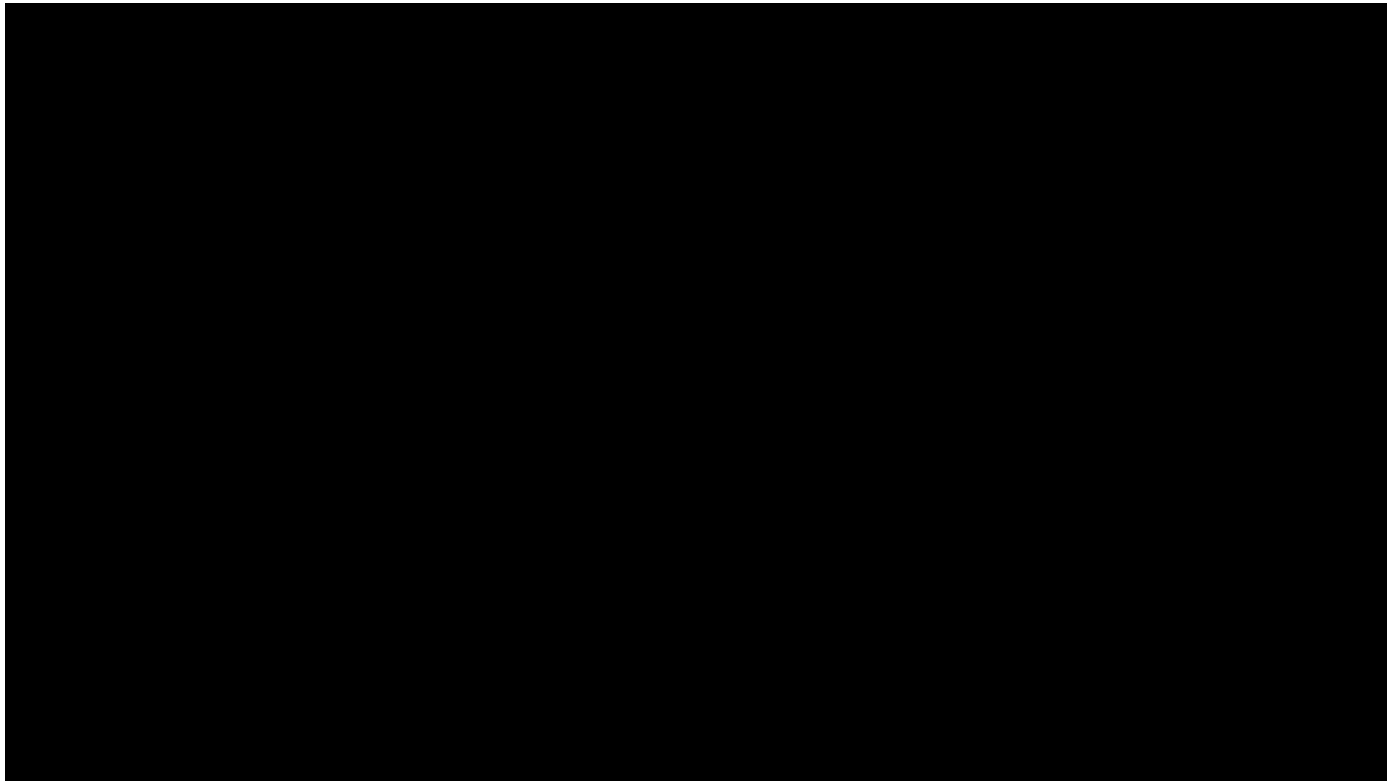
View All ▾ Search 

PO Number	Order Date ▾	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
3387	04/17/17	Issued	04/17/17	1 Each of Swingline Speedpoint Staples	No	3.60 USD	  
3386	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	  
3385	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	  
2685	09/30/12	Issued	None	250 Each of Monogrammed Timbuk2 bags for conference giveaways	No	32,250.00 USD	  
2664	05/31/12	Issued	None	5 Each of Amazon.com: Apple iPod touch 16 GB (2nd Generation) LATEST MODEL: Electronics 12 Each of Amazon.com: Olympus Stylus Tough-8000	No	6,174.63 USD	  

VIDEO: MANAGE PURCHASE ORDERS IN CSP



- The supplier can create a custom view to filter the POs
- The supplier can communicate with Benteler over the comments section of the PO



Source: [Coupa Success Portal](#)

ACKNOWLEDGE ORDERS IN CSP



- The page refreshes to display the PO details and shipping address
- Click the **Acknowledged** checkbox to notify customer that you received the PO
- You can print the PO by clicking **Print View**

Purchase Order #3387

Status Issued - Sent via Email

Order Date 04/17/17

Revision Date 04/17/17

Requester Nanda Halappa

Email nandahalappa@kpmg.com

Payment Term Net 30

* Contract file

* Custom Field 1 None

Attachments None

Acknowledged ☒

Shipping

Ship-To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico
Attn: Nanda Halappa

Terms Standard

Lines

Line	Type	Item	Qty	Unit	Price	Total	Invoiced
1		Swingline Speedpoint Staples	1	Each	3.60	3.60	0.00

Delivery Date


Total 3.60 USD

Save **Print View**


ADVANCE SHIP NOTICE (ASN)

CREATE AN ASN

Note: The ASN feature is only available if the customer has enabled it in Coupa – it is enabled by default, but also needs to be enabled for suppliers on the Supplier Record.


1. Log in to the CSP and click on **Orders**
2. Find the PO you want to send the ASN for in the Purchase Orders table
3. In the Actions column on the right, click on the **Flip to ASN** icon: 
4. The Create Advance Ship Notice page will appear. Fill in at least the mandatory fields, then click **Submit** at the bottom of the page.


Create Advance Ship Notice


 General Info

• ASN #


Status

Ship Date 

Delivery Date 

 Ship To

Address

 Shipping Info

Tracking Number

Carrier

Shipping Method

Ship Note

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VIEW AND MANAGE ASNs

- Click on the **ASN** tab in the menu
- From the **Select Customer** dropdown at the right, choose Benteler as the customer whose ASNs you want to see
- The ASN table will show all ASNs you have sent to Benteler
 - You can filter the table by columns, use the Search bar, or click the **View** drop-down
 - You can export the ASN table in CSV or Excel format with the **Export to** drop-down on the left
- Edit an ASN by clicking on the **Edit** icon





coupa supplier portal SUPPLIERNAME ▾ NOTIFICATIONS 2 HELP ▾




Home Profile Orders Service/Time Sheets **ASN** Catalogs Add-ons Admin

Select Customer Coupa ▾

Advance Ship Notices

Export to ▾ View All ▾ Search 🔍

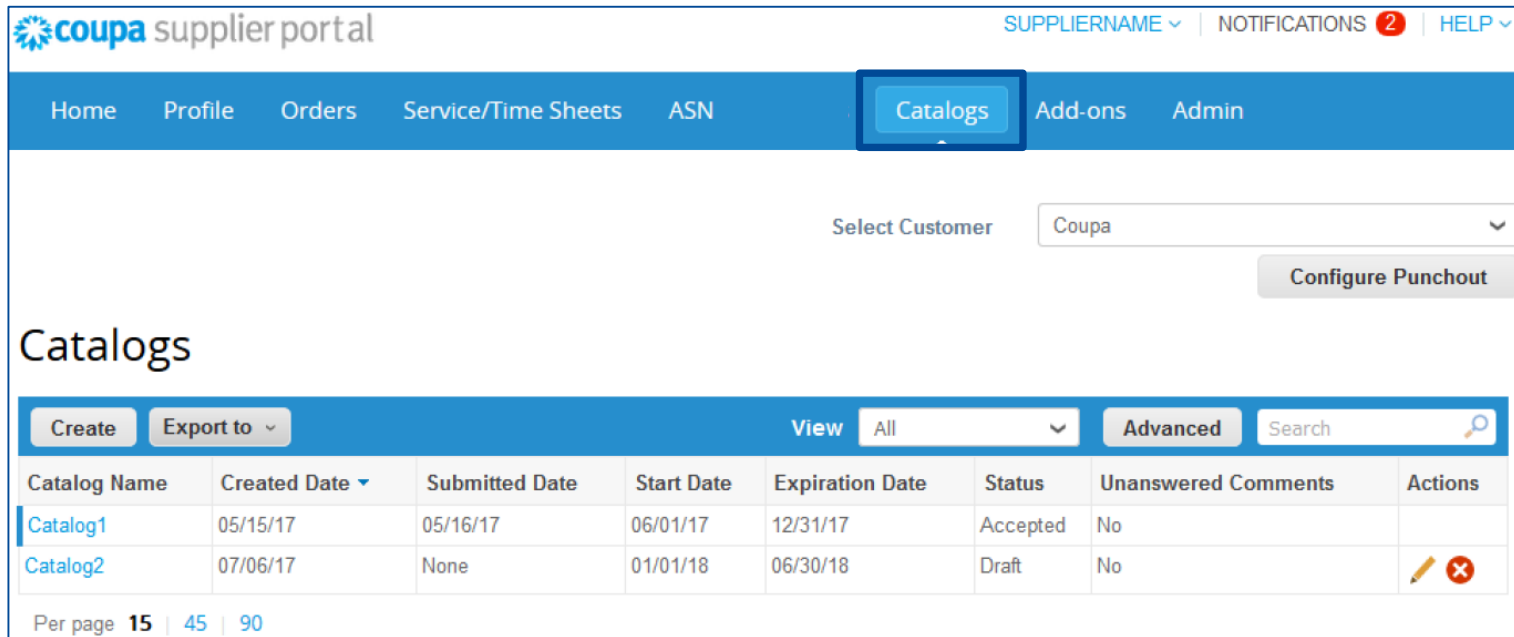
ASN Number	Status	Delivery Date ▴	Last Updated By	Last Updated Date	Actions
111	Draft	None	John Doe	06/09/17	 
222	Pending Receipt	06/02/17	Jane Doe	05/31/17	 

 - Edit the ASN.
 - Delete the ASN.
 - Cancel the ASN.



CATALOGS

CATALOGS OVERVIEW

- To go into the Catalogs page, click **Catalogs** in the menu bar
- A catalog is a collection of items
- You can create as many catalogs as you like, but each catalog has to be approved by Benteler before it can be included in Coupa search results



The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, 'supplier portal', and user information: 'SUPPLIERNAME' with a dropdown arrow, 'NOTIFICATIONS' with a red badge showing '2', and a 'HELP' dropdown. Below this is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, **Catalogs** (highlighted with a red box), Add-ons, and Admin. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Coupa' and a 'Configure Punchout' button. The main section is titled 'Catalogs'. Below the title, there is a toolbar with 'Create', 'Export to' (dropdown), 'View' (set to 'All'), 'Advanced', and a search bar. Below the toolbar is a table with the following data:

Catalog Name	Created Date ▼	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions
Catalog1	05/15/17	05/16/17	06/01/17	12/31/17	Accepted	No	
Catalog2	07/06/17	None	01/01/18	06/30/18	Draft	No	 

At the bottom of the table, there is a pagination bar showing 'Per page 15 | 45 | 90'.

CREATE A CATALOG (1/2)

- To create a new catalog click **Create**
- Now you can create catalog items and set start and expiration dates for prices
- When you have included all the required items, click **Save** or **Submit to buyer**

Catalogs






Create

Export to ▾

View All ▾







Advanced

Search

Catalog Name	Created Date ▾	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions																																				
<div>Company_Catalog_1 Back</div> <div> <div>Customer Sample_Customer_1</div> <div> <div>*Catalog Name</div> <div>Company_Catalog_1</div> </div> <div>Status Draft</div> <div> <div>Start Date</div> <div>mm/dd/yy</div> <div></div> <div>date when catalog prices become effective</div> </div> <div> <div>Expiration Date</div> <div>mm/dd/yy</div> <div></div> <div>date when catalog prices become expired</div> </div> <div>Currency USD ▾</div> </div> <div>0 Items Changed (0 unchanged)</div> <div> <div>  0 ↑ Price Increase </div> <div>  0 ↓ Price Decrease </div> <div>  0 Other Fields Updated </div> <div>  0 New Items </div> <div>  0 Deactivated Items </div> </div> <div> <div>Save</div> <div>Submit to buyer</div> </div> <div> <div>Items Included in Catalog</div> <div> <div>Create</div> <div>Load from file</div> <div>Export to ▾</div> <div>View All ▾</div> <div>Advanced</div> <div>Search</div> </div> <table> <thead> <tr> <th>Name</th> <th>Part Number</th> <th>Status Change</th> <th>Price</th> <th>Price Change</th> <th>Currency</th> <th>Other Fields Changed</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="8">No rows.</td> </tr> </tbody> </table> <div>Per page 15 45 90</div> <div> <div>Items Offered</div> <div> <div>Export to ▾</div> <div>View All ▾</div> <div>Advanced</div> <div>Search</div> </div> <table> <thead> <tr> <th>Name</th> <th>Description</th> <th>Part Number</th> <th>Price</th> <th>Currency</th> <th>UOM</th> <th>Purchasable</th> <th>Last Submitted to Buyer</th> <th>Catalog</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="10">No rows.</td> </tr> </tbody> </table> </div> </div>								Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions	No rows.								Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions	No rows.									
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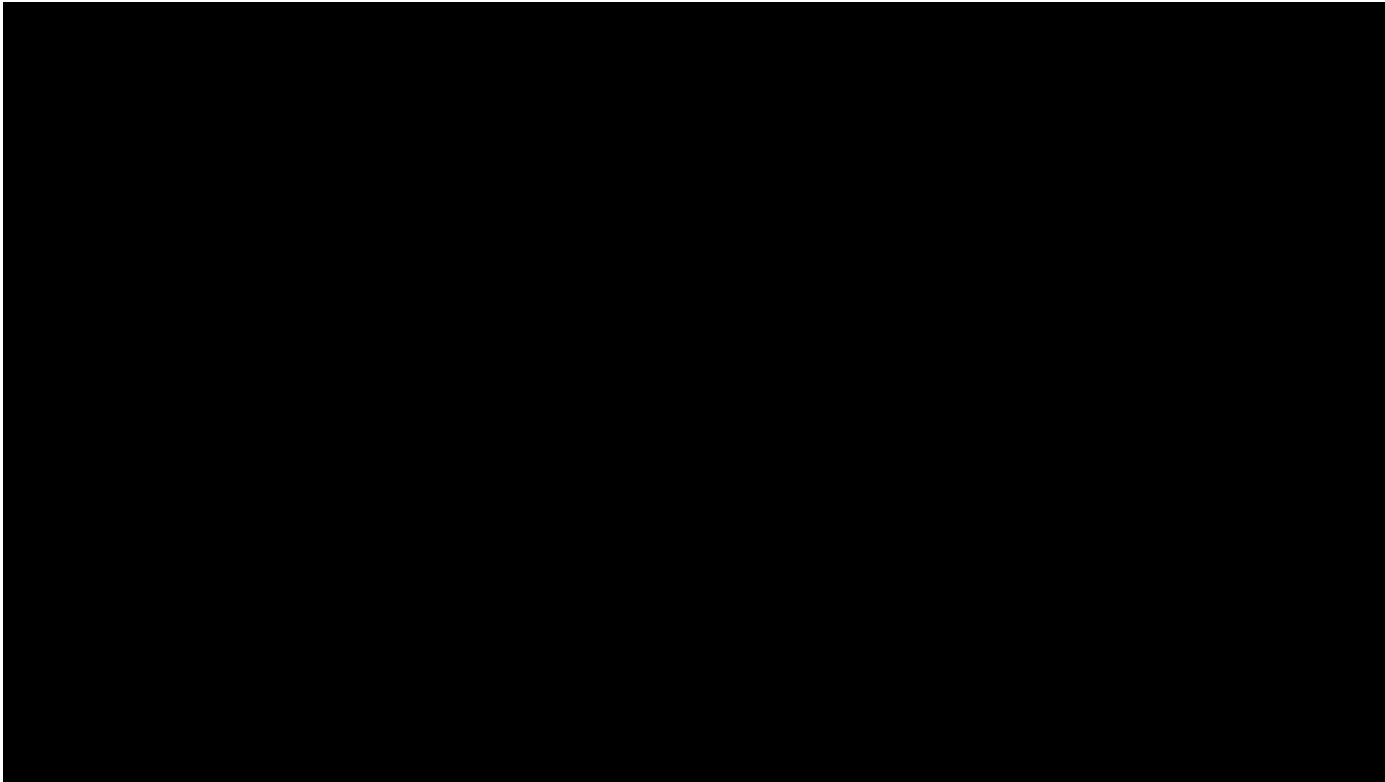
CREATE A CATALOG (2/2)

- Submitting automatically sends a notification to the buyer to review and approve the catalog
- Once the catalog is approved, your goods and services will be available to customers immediately

Catalogs								
Catalog was submitted and buyer will be notified. ✕								
Create	Export to ▾	View All ▾			Advanced	Search 		
Catalog Name	Created Date ▾	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Company_Catalog_3	01/10/19	01/10/19	01/10/19	01/18/19	Pending Approval	No		
Company_Catalog_2	01/10/19	None	None	None	Draft	No		 
Company_Catalog_1	12/03/18	None	None	None	Draft	No		 
Per page 15 45 90								

Note: Please contact your Benteler category manager if you would be interested in setting up a catalog


VIDEO: MANAGE A CATALOG



Source: [Coupa Success Portal](#)


SERVICE/TIMESHEET


CREATE A SERVICE/TIMESHEET

- Click on the **Orders** tab in the main menu and locate the appropriate PO
- In the Actions column, click the icon **Create a Service/Time Sheet**: 
- Select the relevant PO lines, then click the **Create Service/Time Sheets** button
- Enter time, quantity, and/or amount against the PO line items
 - Note: You can only enter one week at a time, and the week applies to all lines
- **Save as Draft** or **Submit** the Service/Time sheet

Service/Time Sheets #504

PO DB0110000461

 Time Sheet
 January 06, 2019 - January 12, 2019

		Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	* Total
PO Line #	Item								
1	Senior Developer Submitted: 0.0 Hour	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	0 

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

Total hours: 0.0

Note: Benteler enabled this feature for you. You also have to enable it for selected CSP user(s) on the Admin page.


MANAGE SERVICE/TIMESHEETS (1/2)



- You can submit multiple service/time sheets for any amounts/quantities against one PO and PO line
- Once submitted, the Service/Time Sheet is routed to Benteler for approval
 - Customer can approve or reject the entire PO, or individual PO lines
 - Customer can accept and pay for partial work; you can see which lines are approved, pending approval, need rework, or are discarded/rejected
- If the Sheet, or one or more lines, are approved: a receipt and an inventory transaction are created for the values of each PO line and you get a notification.
- If the Sheet, or one or more lines, are rejected: you receive a notification of the required rework and you have to submit the Sheet again.

MANAGE SERVICE/TIMESHEETS (2/2)

- Click on the **Service/Time Sheets** tab on the main menu
- From the **Select Customer** dropdown on the right, select Benteler
- From here, you can click on the **Service/Time Sheet number** to view a sheet's details, or click on the associated **PO number** to view the PO
- You can also **Edit**, **Delete**, or **Withdraw** the Service/Time Sheet from this screen


 supplier portal SUPPLIERNAME ▾ NOTIFICATIONS 2 HELP ▾





Home Profile Orders **Service/Time Sheets** ASN Catalogs Add-ons Admin

Service/Time Sheets Service/Time Sheet Lines

Select Customer Coupa ▾

Service/Time Sheets

View All ▾ Advanced Search 

Service/Time Sheets ▾	Purchase Order	Status	Submitted At	Approved At	Actions
468	3472	Draft	None	None	 
353	3434	Approved	03/02/17	03/02/17	
352	3434	Pending Approval	03/02/17	None	
317	3306	Pending Approval	02/25/17	None	

SOURCING EVENT

SOURCING EVENT



- Sourcing Events are always send via E-Mail, please refer to the section “Coupa via Email” for more information

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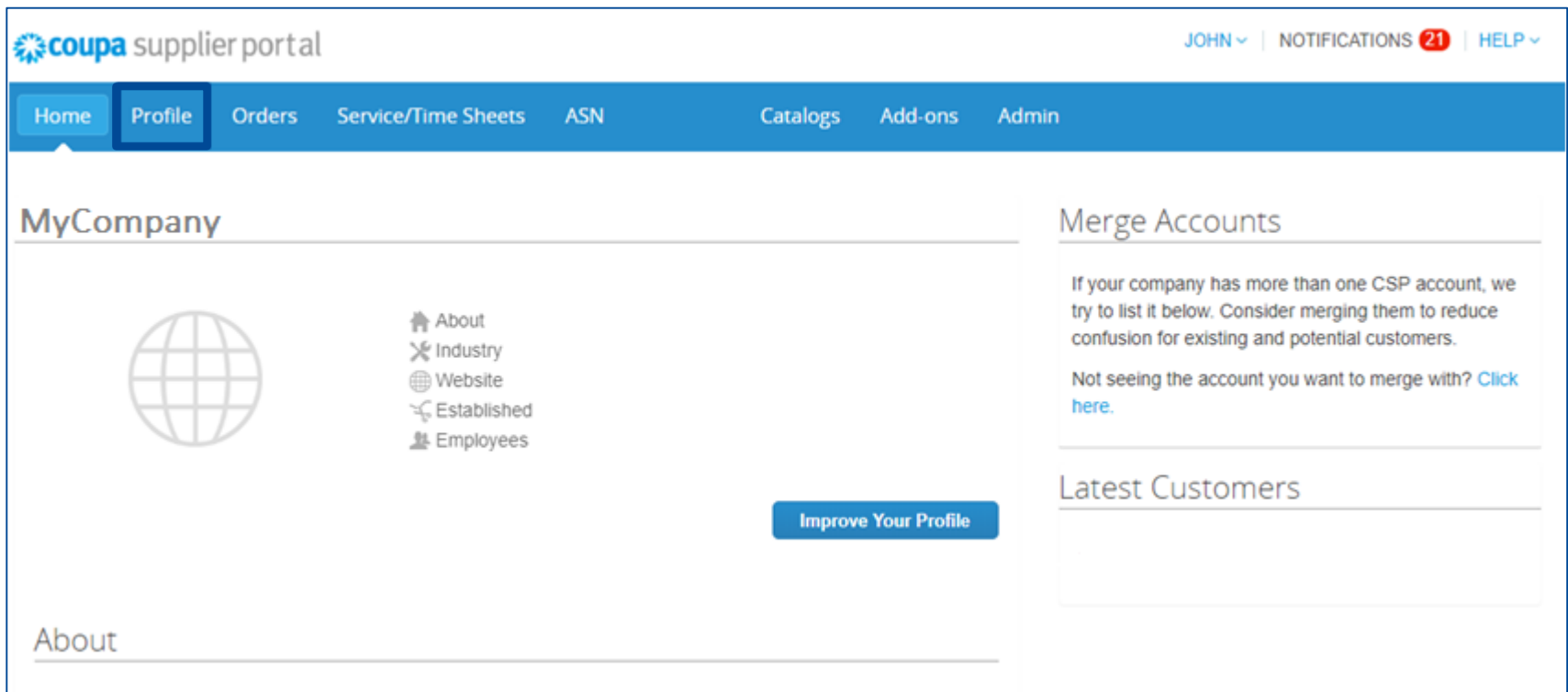
CONFIGURE THE PO DELIVERY METHOD

On the Purchase Orders page, select the customer whose settings you want to modify and click on the **Configure PO Delivery** button.

Column	Description
Purchase Order Method	Choose how to receive POs from your customer: <ul style="list-style-type: none"> Email: Coupa automatically emails POs to the email address you enter. cXML: Coupa sends the PO via cXML. You have to enter the cXML settings to use this option.
PO Email	This field is required for receiving POs via email. Coupa sends POs to this email address. To specify multiple addresses, separate them with a comma.
cXML URL	The full PO routing URL to receive POs.
cXML Domain	Part of the From section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Identity	Your customer's <code>DUNS</code> or <code>NetworkID</code> .
cXML Supplier Domain	Part of the To section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Supplier Identity	Your <code>DUNS</code> or <code>NetworkID</code> .
cXML Secret	A password that you and the customer agreed upon. If no shared password is specified, Coupa automatically passes <code>none</code> .
cXML Protocol	This field should always be <code>cxml</code> .

UPDATE SUPPLIER PROFILE (1/2)

- The profile can be updated after you click the emailed link and complete the sign-up process for the CSP
- Click **Profile** in the menu bar




coupa supplier portal

JOHN ▾ | NOTIFICATIONS 21 | HELP ▾

Home Profile Orders Service/Time Sheets ASN Catalogs Add-ons Admin

MyCompany



- About
- Industry
- Website
- Established
- Employees

[Improve Your Profile](#)

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

Latest Customers

UPDATE SUPPLIER PROFILE (2/2)

Edit Company Info

To start, complete your
Public Profile:

- Click **Profile** on the menu bar
- Click **Edit Profile**
- Enter your company information into the applicable fields
- Required fields are marked with an asterisk (*)
- Click **Save** when finished

Add Users

Allow additional users
access to your account:

- From the menu bar, click **Admin**, then click **Invite User**
- Enter employee's email address, then click **Send Invitation**
- You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table
- You can delete a user by clicking the **Delete** icon

Note: If a user is given access to a specific customer, the user can access ALL POs for that customer

MANAGE USERS (1/2)

Permissions can be limited for each individual user in your account. Users can be limited to only certain customers, certain types of documents, and certain tasks.

Click on the **Admin** tab, then click **Users** on the left.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Catalogs, Add-ons, and Admin. The Admin tab is selected. On the left sidebar, the Users link is highlighted. The main content area displays a table of users with columns for Users, Permissions, and Customer Access. A user named 'Max Mishka' is listed with the email 'max.mishka@coupa.com'. An 'Edit' button is visible next to the user name. A blue callout box highlights the 'Edit' button and points to an inset window titled 'Edit User Access for Max Mishka'. This modal window contains fields for User info (First name, Last name, Email) and sections for Permissions and Customers. The Permissions section has checkboxes for 'All', 'admin', 'orders', 'invoices', 'catalogs', and 'profiles'. The Customers section has checkboxes for 'All', 'Coupa Buying Corp', and 'Twelve Corp'. At the bottom of the modal are buttons for 'Deactivate User', 'Cancel', and 'Save'.

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com Edit	ASNs Admin Catalogs Invoices Orders	Coupa

Edit User Access for Max Mishka

User info

- * First name: Max
- * Last name: Mishka
- * Email: max.mishka@coupa.com

Permissions

- ☐ All
- ☒ admin
- ☐ orders
- ☐ invoices
- ☒ catalogs
- ☐ profiles

Customers

- ☐ All
- ☒ Coupa Buying Corp
- ☒ Twelve Corp

Deactivate User Cancel Save

Click the **Edit** button under a user's name to change access.

MANAGE USERS (2/2)

It is possible to allow or disallow the following permission for users:

Permissions	Description
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 can't edit existing users. The permissions on the invitation can't exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles.
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.

MULTIPLE LOCATIONS MERGE REQUEST

- If you supply multiple Benteler locations, you will have multiple CSP identities
- If you would like to merge them to manage everything from one account, there is a **Request Merge** option

1

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

2

Initiate Merge Request

Open merge requests

All clear! No open merge requests.


3

Request Account Merge

You're about to merge your profile and users with [IT10_FARINELLA](#). Select the owner for the merged account. For more info on merging, [Click here.](#)

* Account Owner ☒ My Account
☐ Their Account
By choosing this option I understand that I will no longer be the account owner.

* Note

☐ Non sono un robot 
reCAPTCHA Privacy - Termini

- More information on creating and managing Merge Requests is available on the Coupa Success Portal under [“Manage Merge Requests”](#)

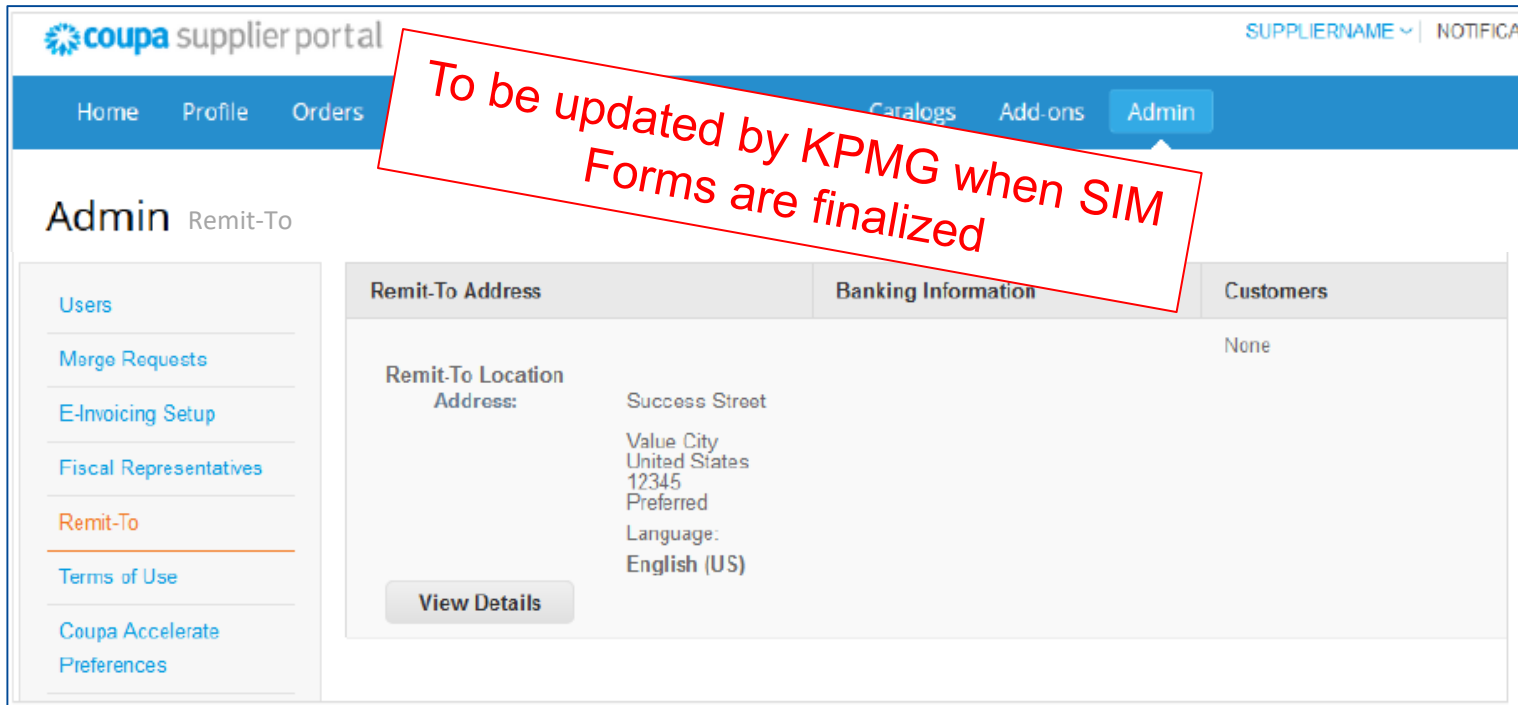
SIM FORMS

*To be updated by KPMG when SIM
Forms are finalized*

VIEW REMIT-TO INFORMATION

On the left of the Admin page, click on the **Remit-To** link to view the list of remit-to addresses and their details - for example, the customers they are assigned to.

Click on **View Details** to see more information.



The screenshot shows the Coupa Supplier Portal Admin page. The top navigation bar includes Home, Profile, Orders, Catalogs, Add-ons, and Admin. The left sidebar lists various admin functions: Users, Merge Requests, E-Invoicing Setup, Fiscal Representatives, Remit-To (highlighted), Terms of Use, Coupa Accelerate, and Preferences. The main content area is titled 'Admin Remit-To' and contains three tabs: Remit-To Address, Banking Information, and Customers. The Remit-To Address tab is active, displaying the following information:

Remit-To Address	Banking Information	Customers
Remit-To Location Address: Success Street Value City United States 12345 Preferred Language: English (US)		None

A red callout box with the text "To be updated by KPMG when SIM Forms are finalized" is overlaid on the top right of the page. A "View Details" button is located at the bottom of the Remit-To Address section.

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KEY TAKEAWAYS

Benteler Input needed

makes it happen

- Coupa centralizes Benteler's Purchase-to-Order processes and provides important benefits to our strategic supplier relationships, as for example transparency over the Benteler purchase orders online
- Suppliers have expanded online capabilities: manage catalogs and pricing, receive/acknowledge purchase orders, and create hosted catalogs (if enabled on CSP)
- Benteler expectations: Just orders send from Coupa for NPM commodities are valid
 - Therefore, supply goods and services only after you receive a PO



NEXT STEPS

Benteler Input needed

makes it happen

- Make sure to accept the Coupa Supplier Portal email invite if you have not already
- Update all profile and admin information in the CSP as soon as your connected account is created
- If you are using a hosted catalog, be sure to manage your CSV file going forward and follow Benteler's Coupa Add/Update Items Process for any catalog changes



THANK YOU

APPENDIX

CSP QUICK REFERENCE GUIDE (1 OF 2)

Introduction

You will find the Coupa Supplier Portal easy to use. This guide will help you create a catalog or view POs.

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 at <https://supplier.coupahost.com>
2. **Reset your account:** If you have forgotten your username or password, click the link at the bottom of the page.

1

Edit Your Company Info

The first thing you should do is complete your **Public Profile**. Company Info tab→ Edit. Ensure all mandatory fields are filled in; 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 perform all tasks in your account:

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 users' 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

NOTE: When enabled for a given customer, a user can access ALL POs for that customer.

2

Configure Customers

Settings for PO Delivery option and Punch-out are maintained individually for each customer. You can also setup specific customer profiles:

1. Click on the customer tab (labeled with 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 Punch-out Site:

1. Under the customer name tab, select **Punch-out**.
2. Enter the customer Punch-out configuration details. It will be effective immediately.

If your customer chooses to receive updates, they are automatically pushed to the customer's Coupa environment.

CSP QUICK REFERENCE GUIDE (2 OF 2)

3

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. 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**.

4

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. **Submit Catalog:** When you have included all the items required, click **Submit to Buyer**. This automatically sends a notification to the buyer to review the catalog and approve. You can view the status in real-time in the **Catalogs** view. Once the catalog is approved, your products and services are immediately available to your customer's employees.

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 your **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**. Ask the other account owner to log in and on their **Home** page, click on **Merge** then **Accept** on the next screen.

BENTELER in 84 words.

BENTELER develops solutions that make the difference – for our customers, employees and society. We are passionate about producing safety-relevant products, services and systems for the energy, automotive and engineering sectors that lead to success. And we do that in close proximity and collaboration with our customers. With our technological expertise and strong focus on successful implementation, we keep our promises. At BENTELER we give our all – with courage, ambition and respect – but we never give up.

BENTELER. The family of driven professionals. Since 1876.

BENTELER in 67 Wörtern.

BENTELER entwickelt Lösungen, die den Unterschied machen – für unsere Kunden, Mitarbeiter und die Gesellschaft. Leidenschaftlich und nah am Kunden produzieren wir sicherheitsrelevante Produkte, Systeme und Services für die Bereiche Maschinenbau, Automobilindustrie und Energie, die zum Erfolg führen. Technologisch exzellent und stark in der Umsetzung halten wir, was wir versprechen. Mit Mut, Ambition und Respekt geben wir alles, nur nicht auf.

BENTELER. Die Familie der Lösungsmacher. Seit 1876.

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