COUPA SUPPLIER PORTAL TRAINING GUIDE

FLINT HILLS resources®

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01 INTRODUCTION TO COUPA

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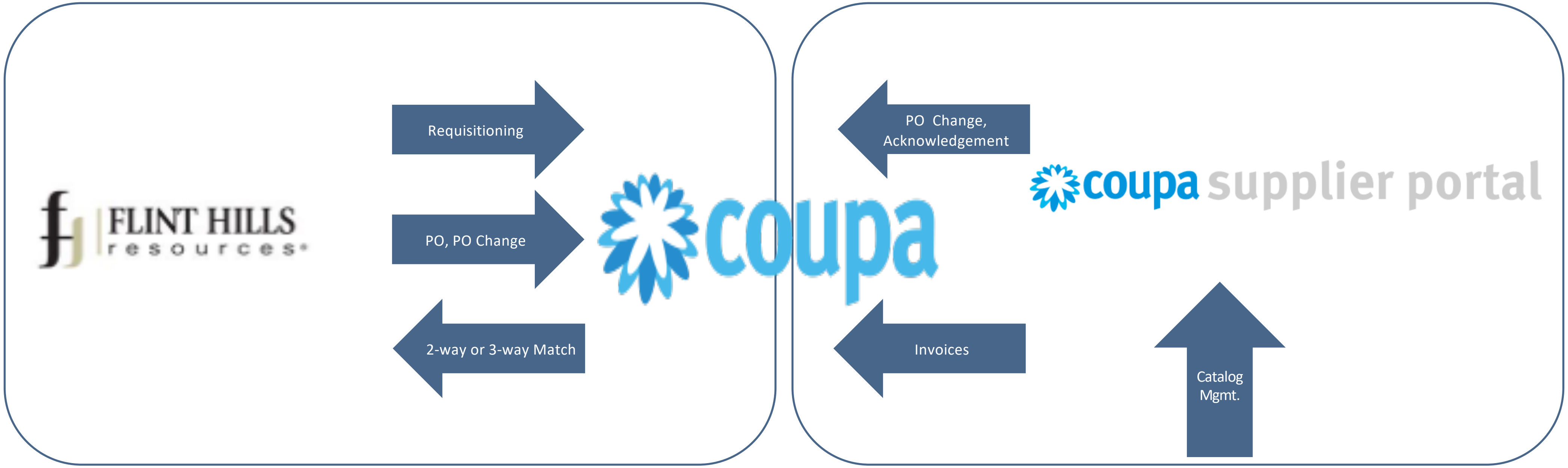
What is Coupa?

Flint Hills Resources has selected Coupa, a procure-to-pay platform that specializes in connecting buyers with their suppliers.

- Coupa is a user-friendly e-Procurement and cloud-based supplier collaboration software
- Coupa is an internet-based solution capable of accommodating a variety of different systems (plug and play)
- The Coupa Supplier Portal (CSP) allows suppliers to become more efficient by automating activities as much as possible to fit their capabilities (i.e., PO flip, order routing, invoice creation, partial invoicing)
- The Coupa Supplier Portal (CSP) is free - there is no cost for suppliers



How Will You Benefit?

By working with Flint Hills Resources electronically, you will increase your order-taking efficiency, reduce fulfillment errors and delays, and maintain a better relationship with Flint Hills Resources users.

Benefits include, but are not limited to:

- Efficient purchase order receiving and acknowledgement
- Efficient invoice processing
- PO-backed invoice creation
- Automated and accurate routing of invoices to proper branches
- Instant visibility to purchase orders, invoice status, and payment information
- Efficient catalog management
- Reduced or eliminated manual paper transaction processing
- Strong reporting capabilities

02 CSP SUPPLIER PROFILE & ACCOUNT STEUP

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Connecting to Flint Hills Resources via Coupa

It is preferred that all suppliers connect to the Coupa platform to transact with Flint Hills Resources electronically. In order to receive an invitation to the Coupa Supplier Portal, Flint Hills Resources needs your primary contact details.

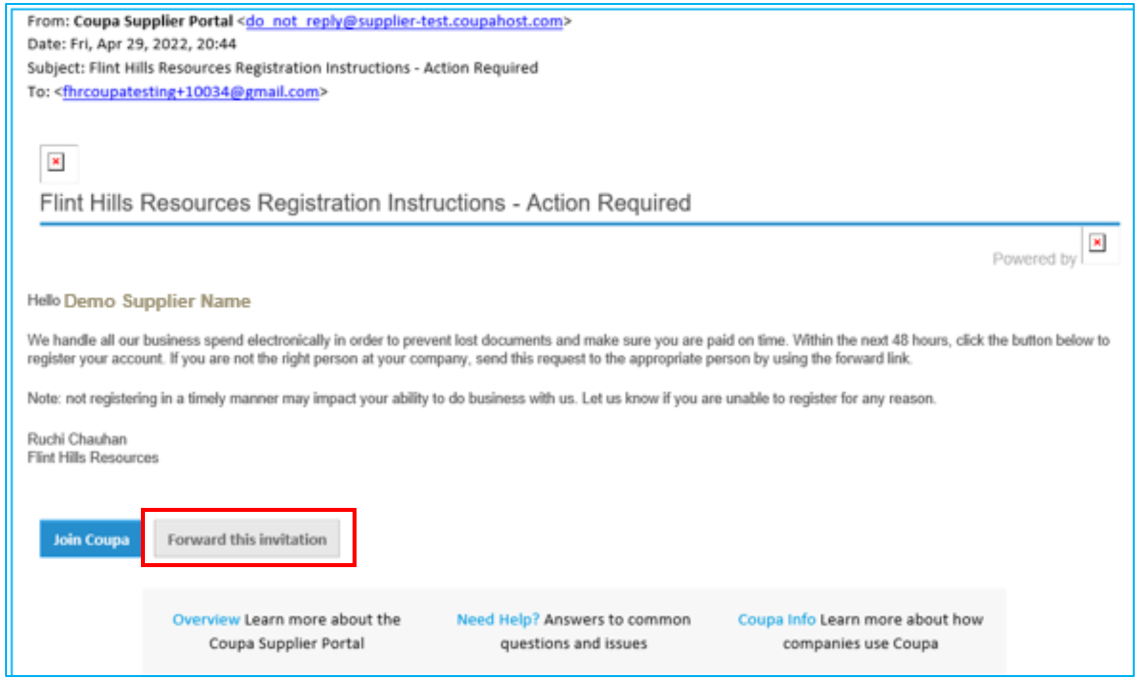
- After Flint Hills Resources sends you an invitation to join the Coupa Supplier Portal (CSP), open the email containing the invitation and click on the link to confirm the request to interact with you as a supplier in Coupa
- By confirming this link and selecting "**Join Coupa**" you will be creating a new login on the Coupa Supplier Portal to receive purchase orders (POs) and send invoices to Flint Hills Resources
- If the invite was sent to the incorrect person at your company, inform your Flint Hills Resources Supplier Enablement contact. If you received the invite incorrectly and need to send to another person within your company, select "**Forward this Invitation**"

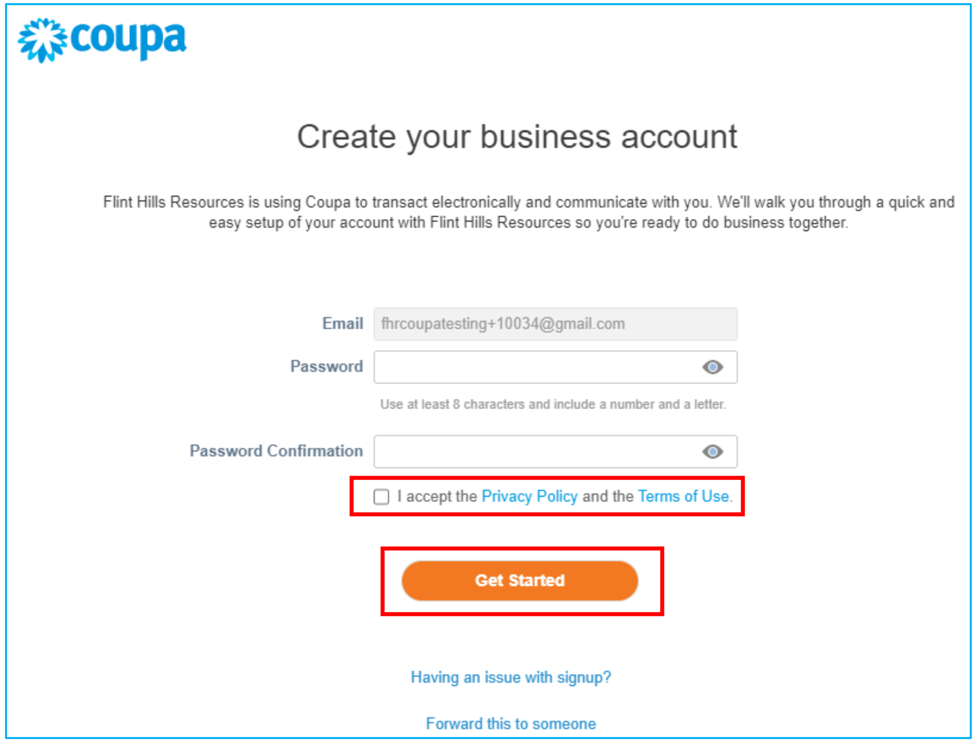
Connecting to Flint Hills Resources via Coupa

Fill out your information on the Coupa Supplier Portal to create a new account

Click the check box to accept the Terms of Use

Click **Get Started**





Merging Accounts

Select **Setup** from the top menu bar

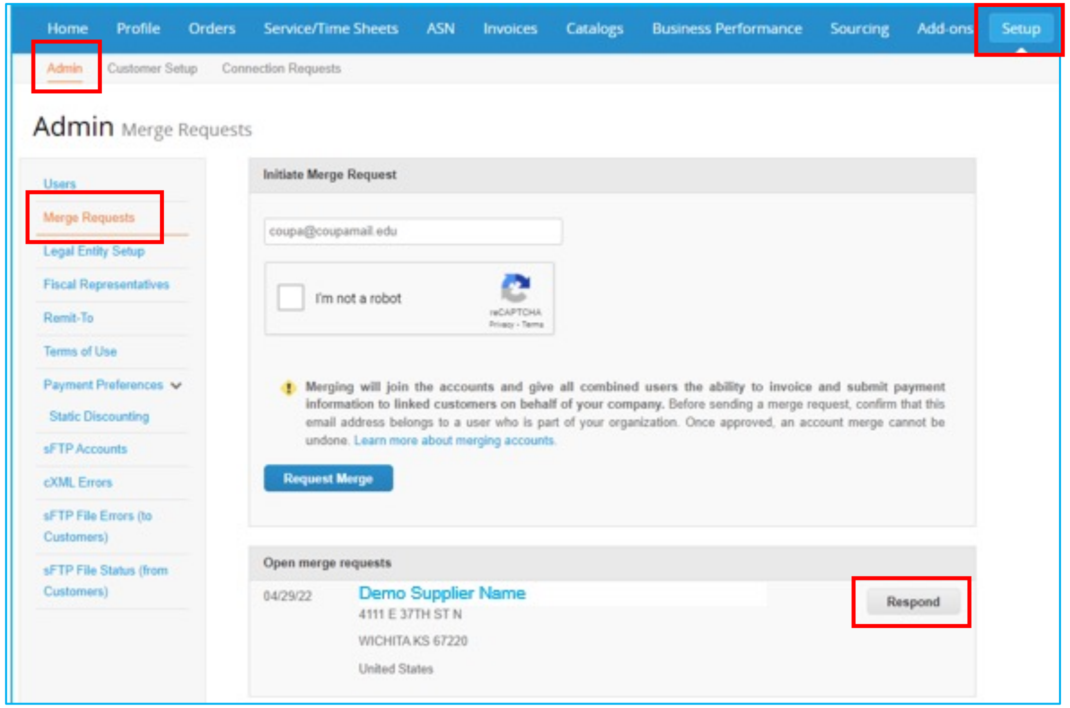
Under **Admin**, click **Merge Request** to see the requests

Click on **Respond**

Check the box if you agree to merge and click **Accept**

Click **Reject** if you do not agree to merge

**Once two accounts are merged, they are not able to be unmerged*



*Note: You can also initiate the merge request by providing the account email ID and clicking on **Request Merge***

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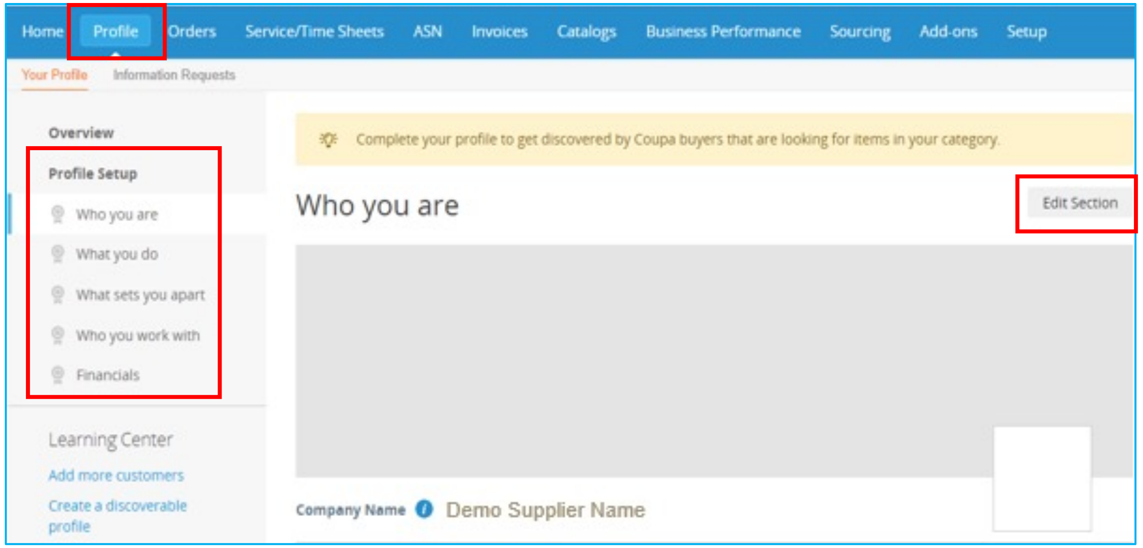
Create or Update the Supplier Profile

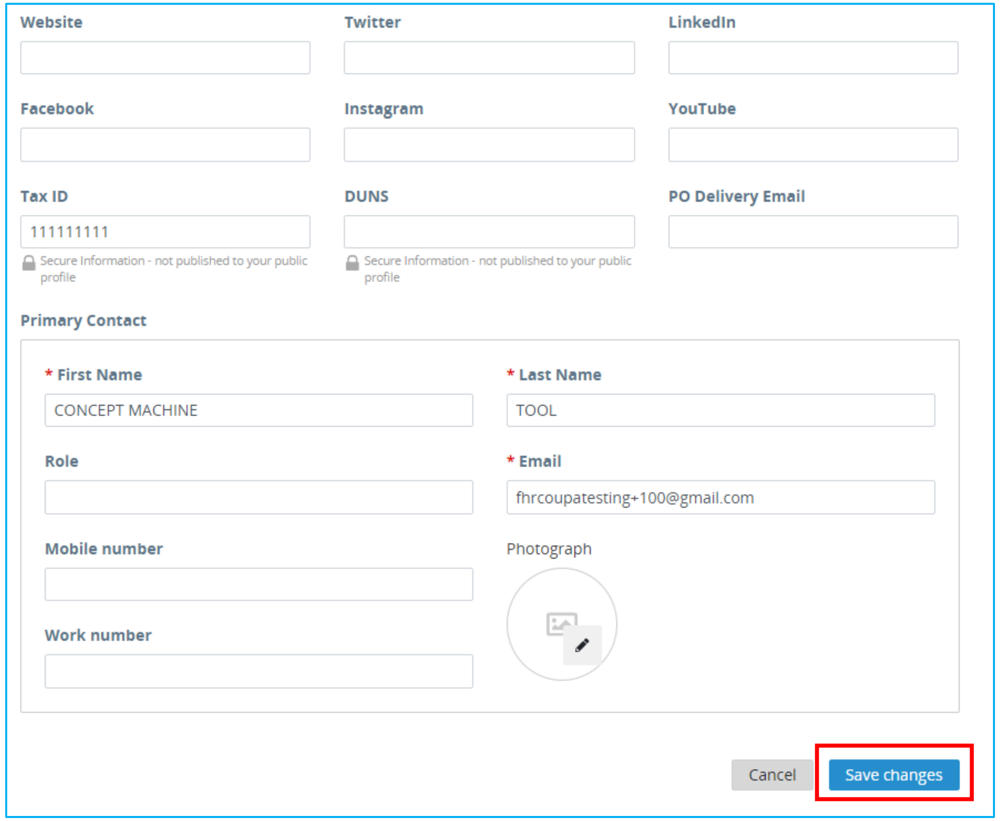
Under the **Profile** tab, select **Profile Setup** and choose a section that you want to update

You will use this section to fill out additional company information

Click **Edit Section**

Update the information and click on **Save Changes**





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Information Requests – Respond to SIM Request

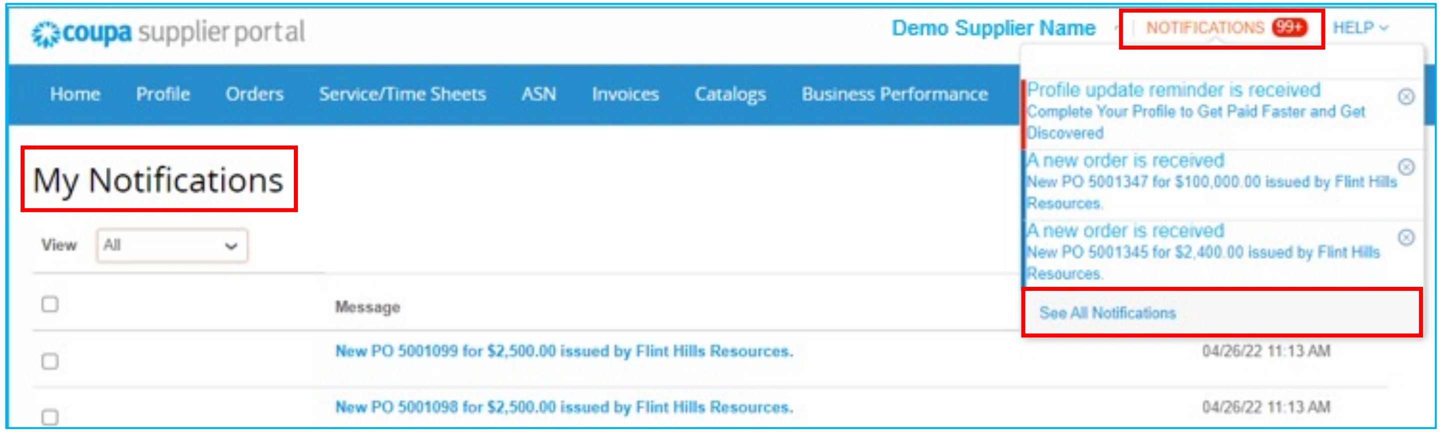
When FHR needs more information from you, they will send a SIM (Supplier Information Management) request via a SIM form

When the information request is sent, a notification will trigger

At the top right corner of the screen click on **Notifications** and then click on **See All Notifications**

Under **My Notifications,** search for the notification asking you to update your profile

Click on the **Update your profile** notification



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Information Requests – Respond to SIM Request

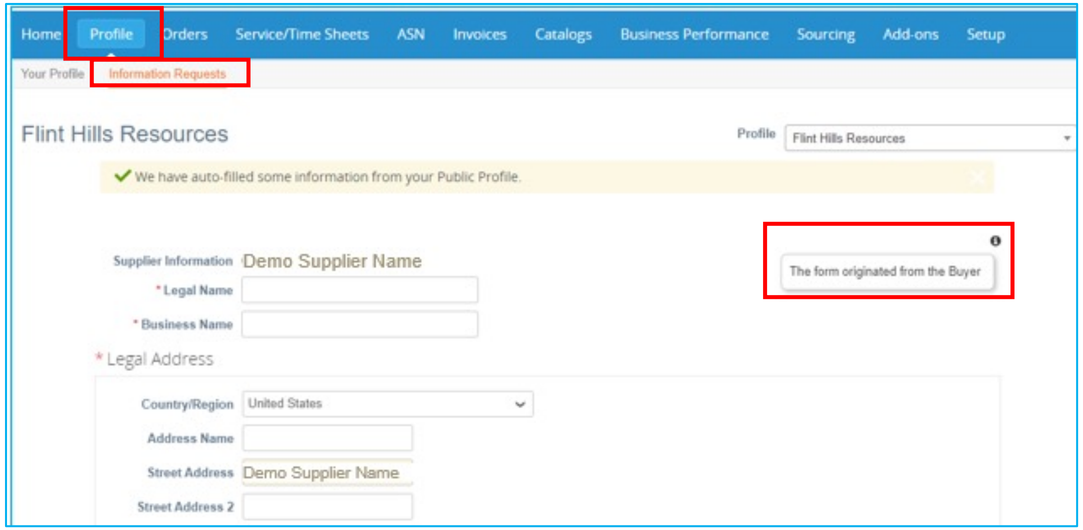
The system will take you to the **Information Requests** section under the **Profile** tab

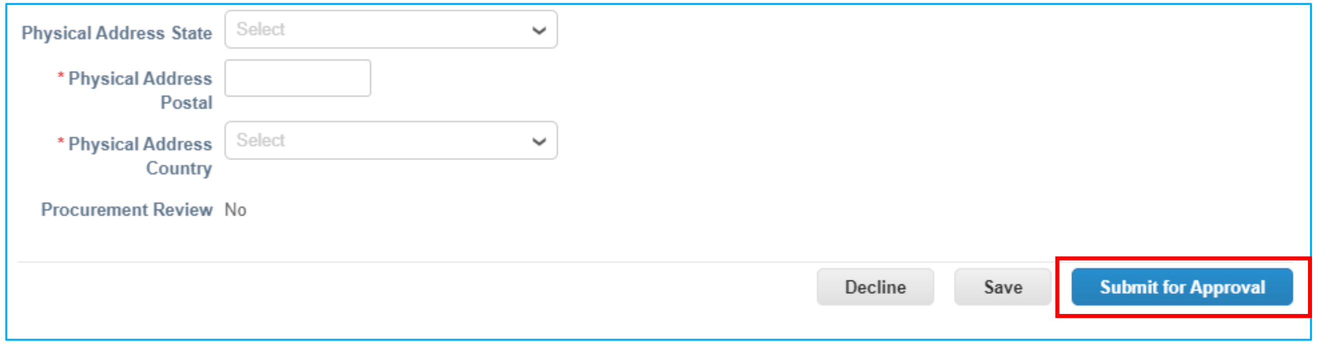
You can also manually navigate to the **Information Requests** section to respond to the form

The information icon at the right will provide the information that the form originated from the buyer

Add/Update the details

Scroll down and click on **Submit for Approval**

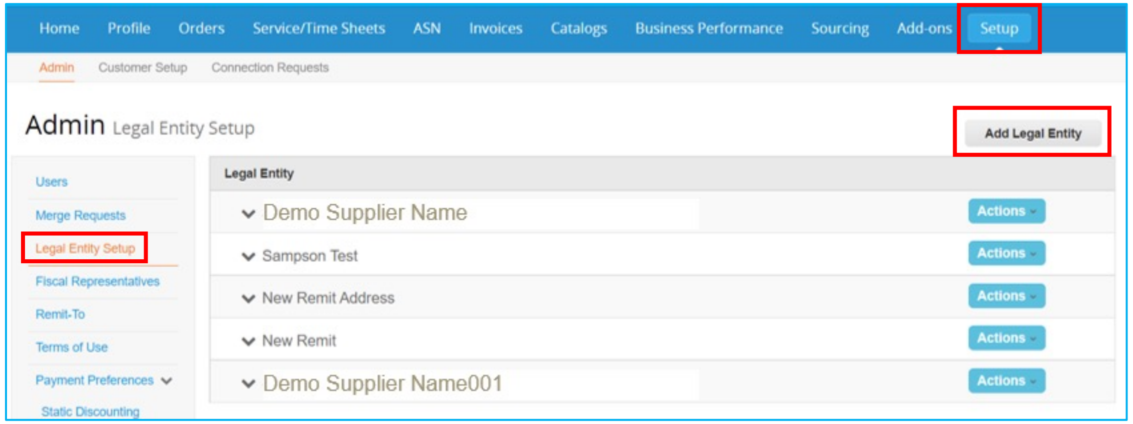


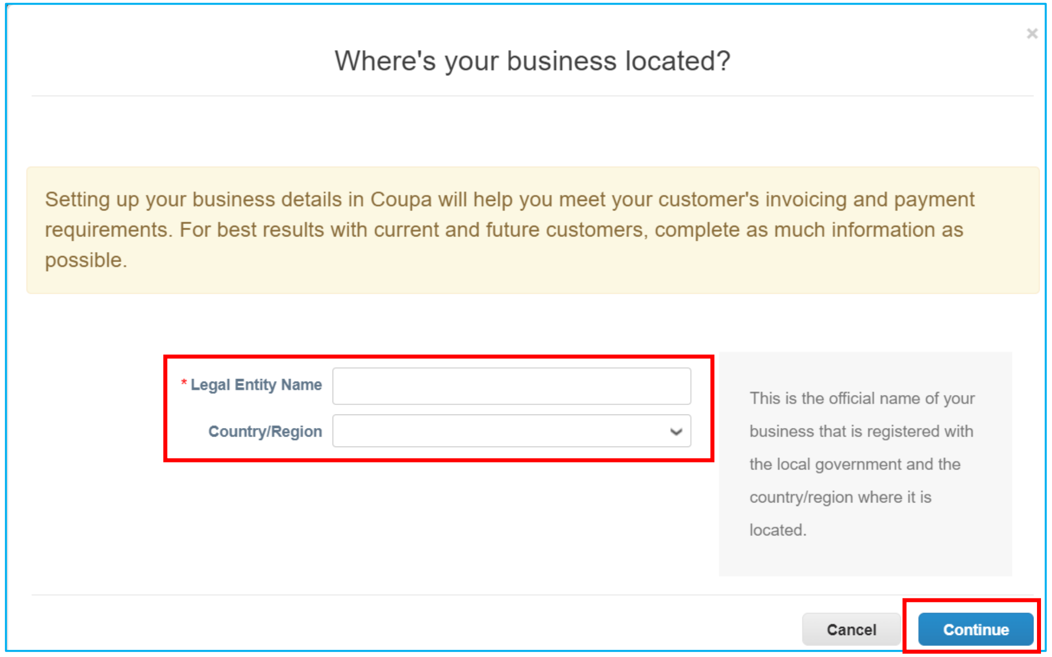


Legal Entity Setup

You need to add Legal Entity information as well as Remit-To and Ship From Addresses to enable E-Invoicing.

- Click on the **Setup** tab from the top menu bar and select **Legal Entity Setup** from the menu on the left
- Click **Add Legal Entity**
- Enter your Legal Entity information
- Click **Continue**





Legal Entity Setup: Enabling E-Invoicing

Complete the invoice address details

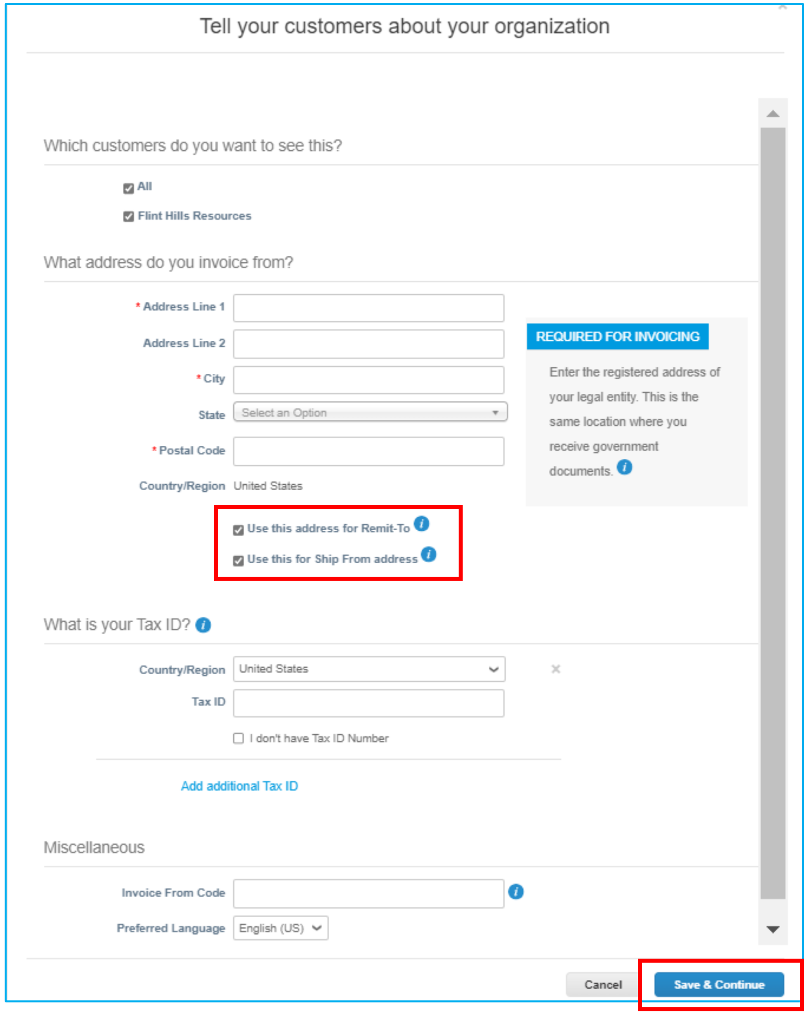
Enable the below checkboxes if Remit-To and Ship-From addresses are the same as the invoice address:

- Use this address for Remit-To*
- Use this address for Ship From address*

If either Remit-To or Ship From address is different, disable the corresponding checkbox and enter different address details

Click **Save & Continue** when finished

Review the information and click **Done**



NOTE: If Ship From address and Remit-To address checkboxes are not selected, the user will have to provide this information after selecting **Save & Continue**

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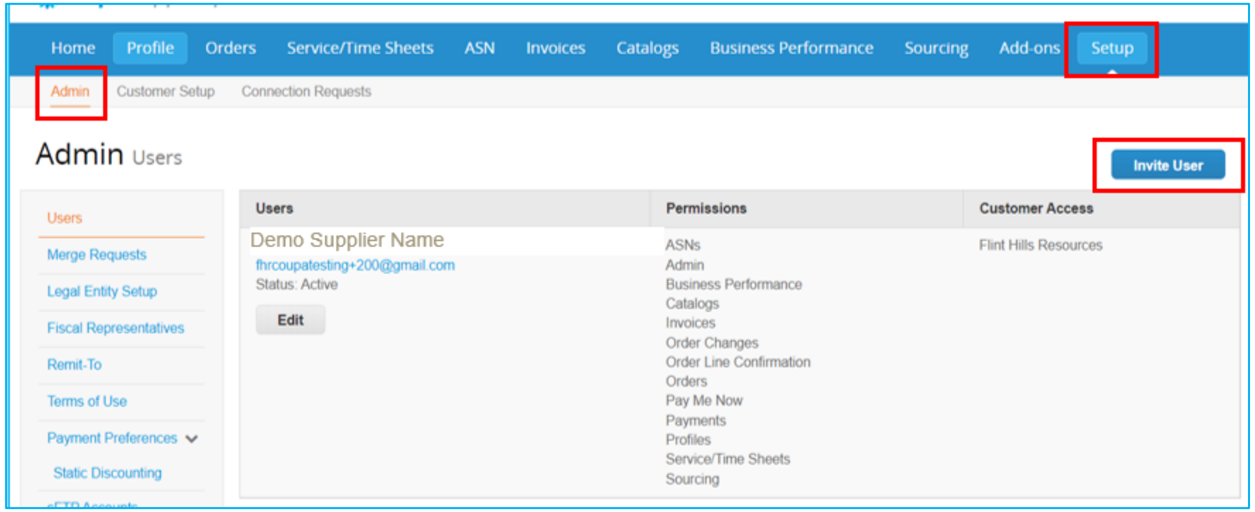
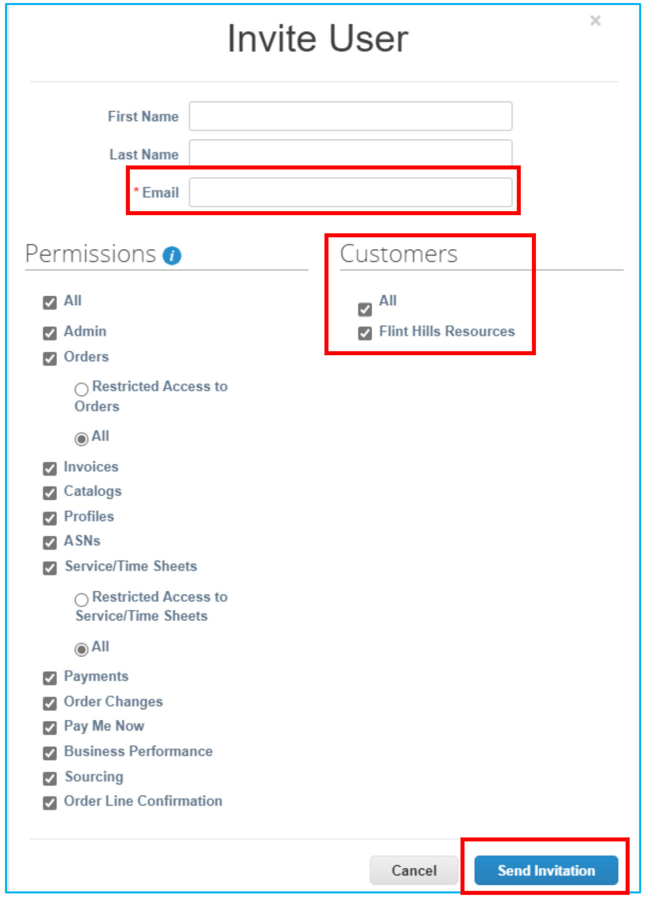
Adding and Editing Users

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

- Click on the **Setup** tab from the top menu bar
- Select **Users** from the menu on the left
- Click **Invite User**
- Enter (at least) the employee's email address in the **Invite User** pop-up window and click **Send Invitation**
- You can restrict access to specific customers by checking/unchecking customer name boxes under **Customers** section.

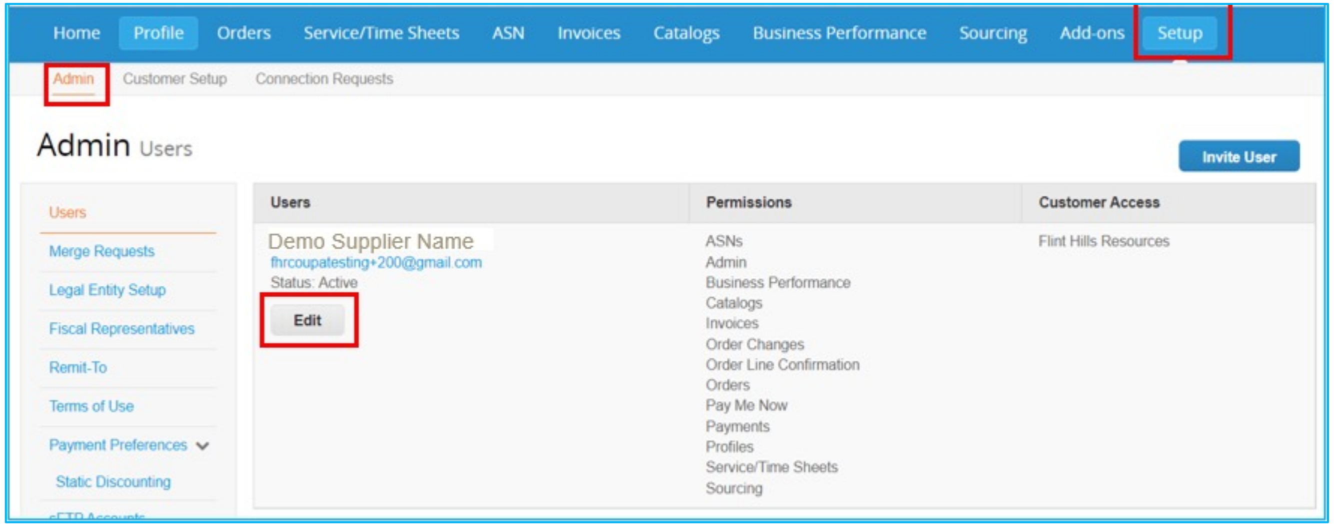


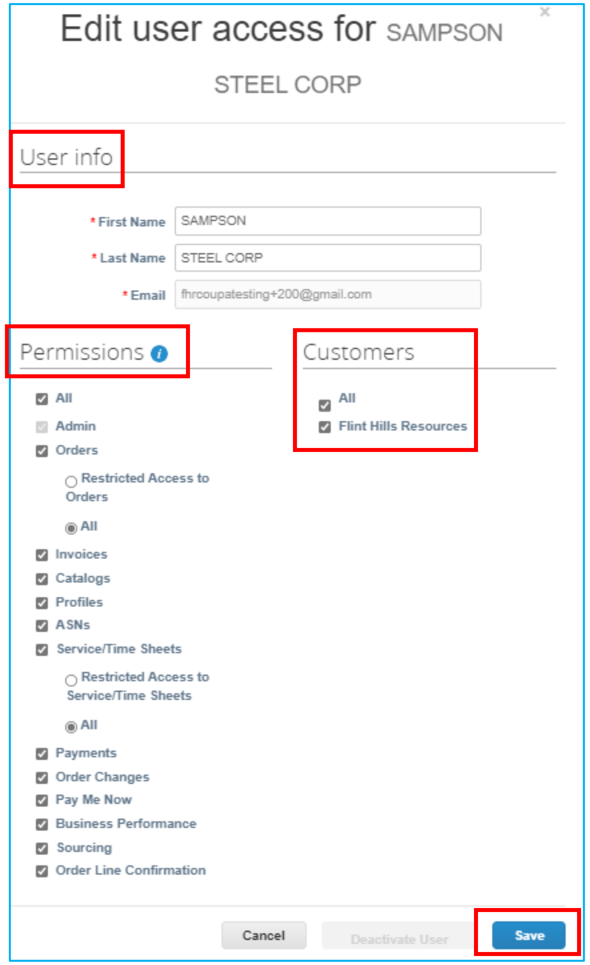


Adding and Editing Users

If desired, you can edit existing users.

- Click **Setup** tab from the top menu bar
- Select **Users** from the menu on the left
- Click **Edit**
- Edit **User Info**, if required. Enable or disable permissions under the **Permissions** section
- You can restrict access to specific customers by checking/unchecking customer name boxes under the **Customers** section
- Click **Save**





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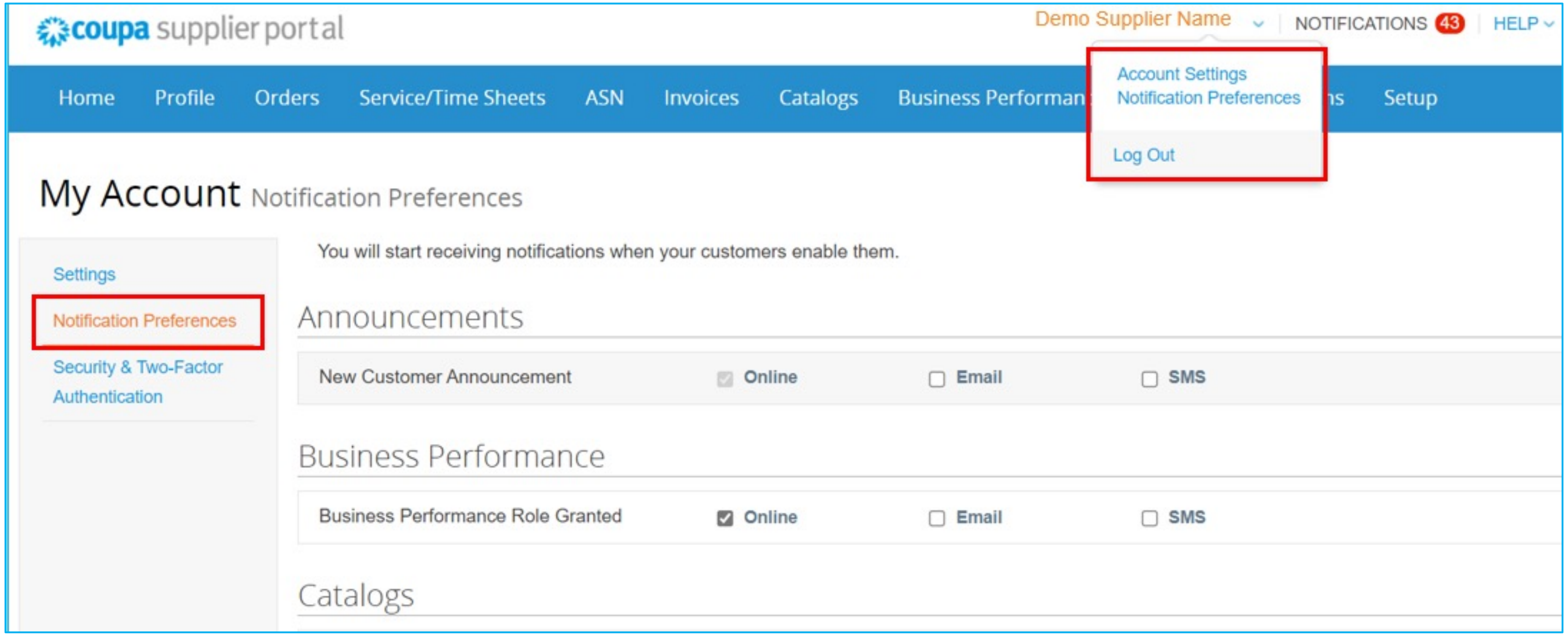
Managing Notifications

Your notification preferences can be changed.

- Hover over your **name** at the right top corner and then click on the **Notification Preferences** link from the dropdown menu
- On the **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive notifications for and specify the notification type: online (to do list), email, or SMS (short text message)



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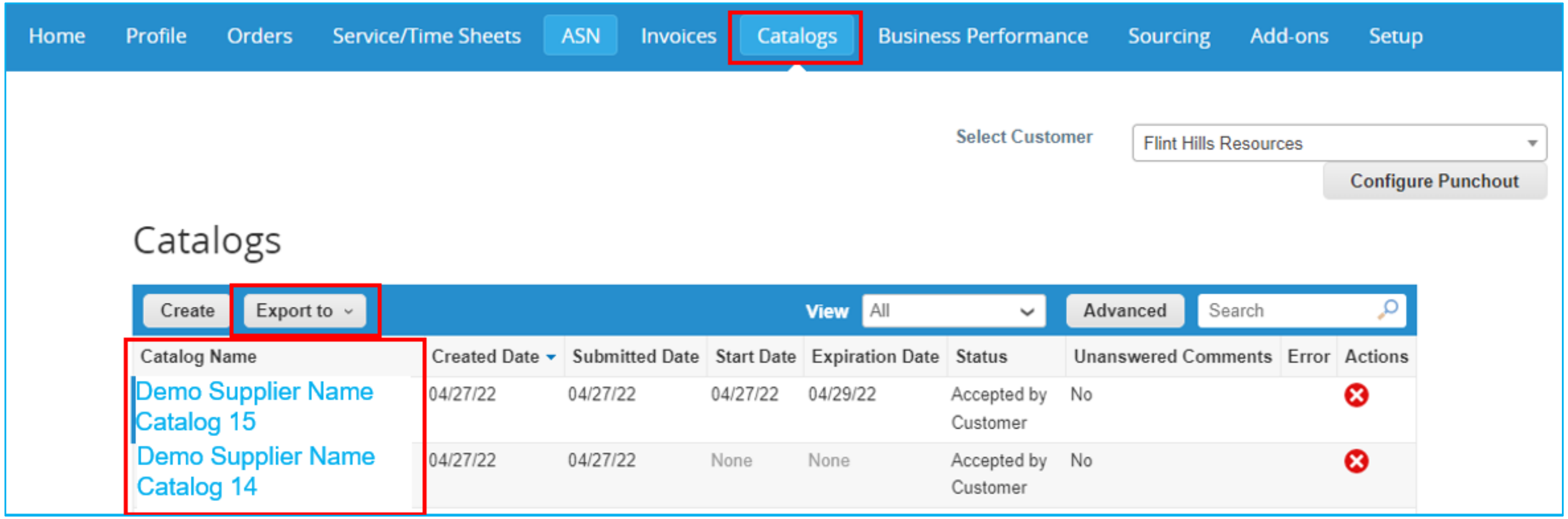
Viewing and Managing Catalogs

After initial setup with Flint Hills Resources, you can manage catalog update requests from the CSP.

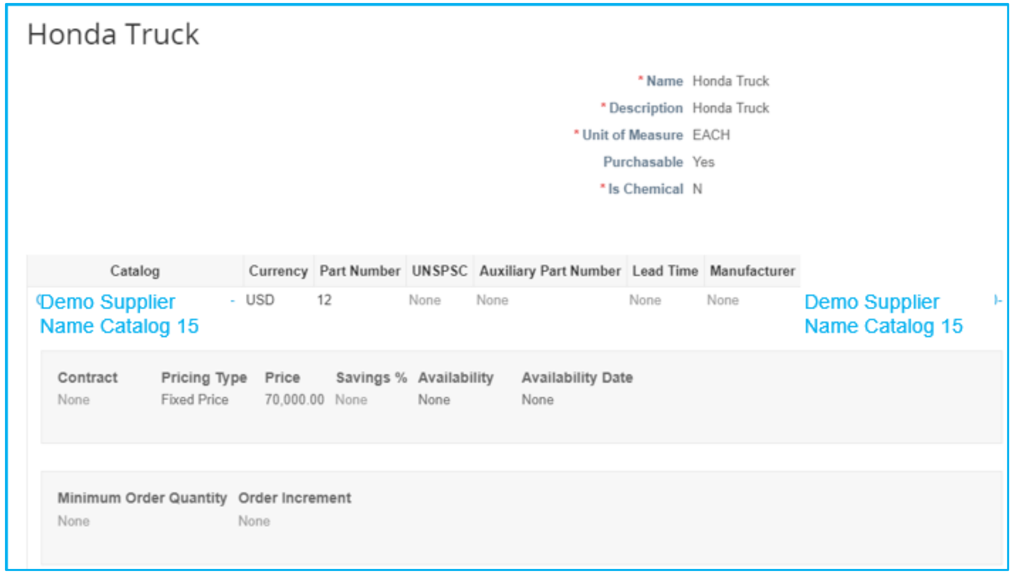
- Select **Catalogs** from the top menu bar to view your Flint Hills Resources catalog information and available actions
  - **Export to**: Export catalog details to CSV or Excel
- Click on the **Catalog Name** to view the list of individual catalog items



Viewing and Managing Catalogs

Once the **Catalog Name** is clicked, the list of individual catalog items will be visible

Click on the **Item Name** in your catalog to view the detailed item page



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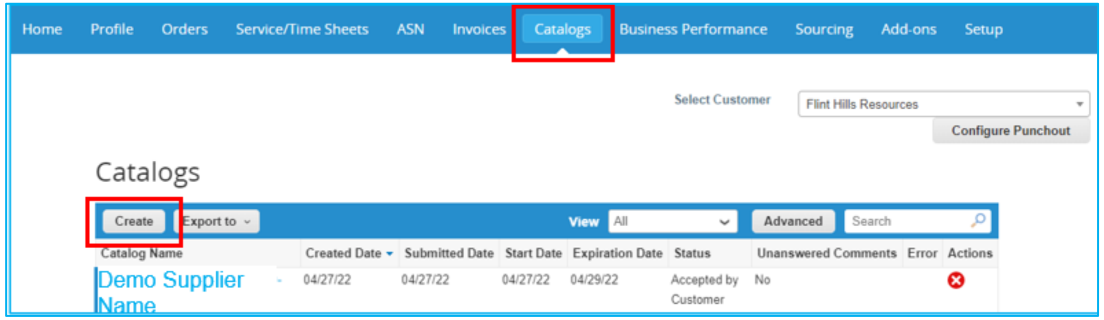
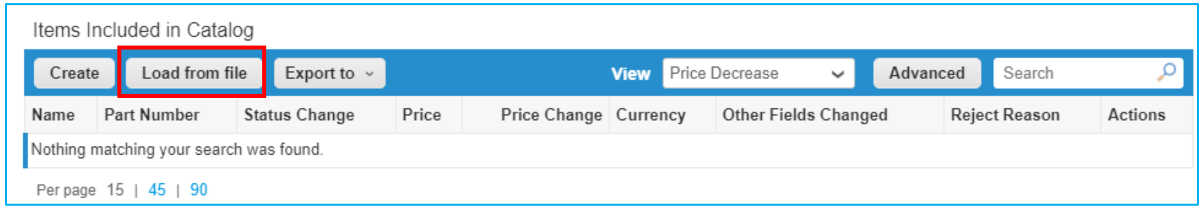
Viewing and Managing Catalogs

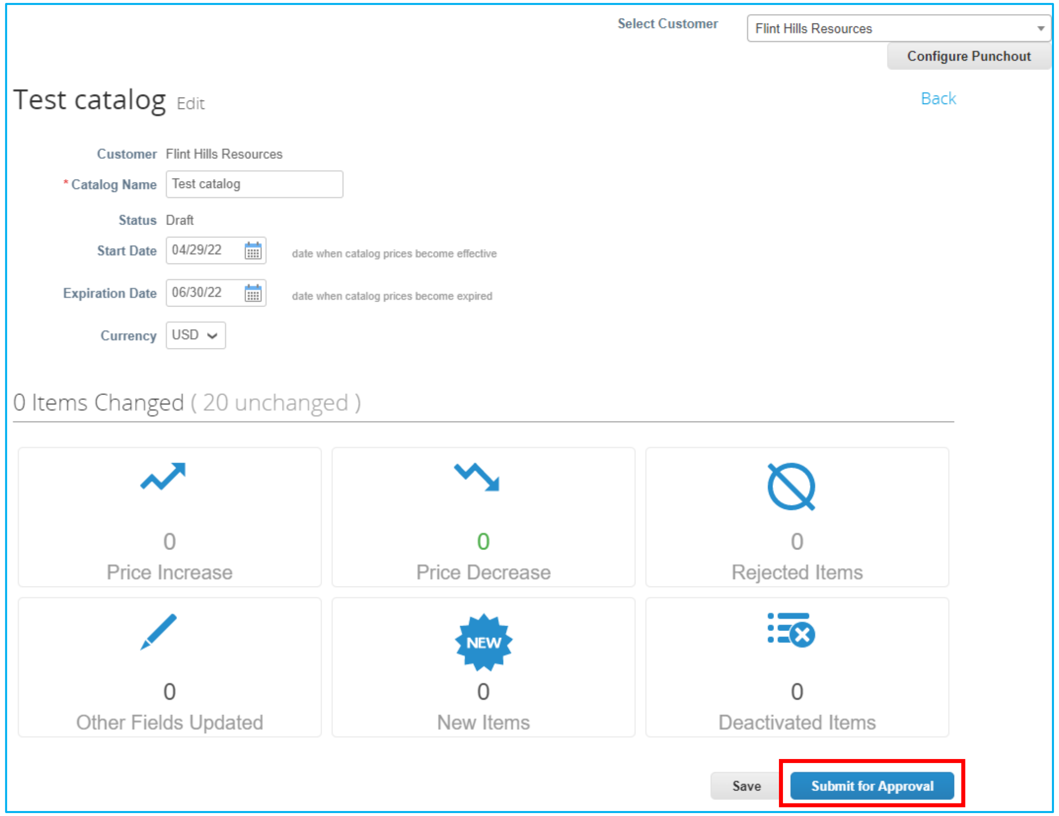
Under the **Catalogs** tab, click **Create** to create a catalog request

You can either bulk upload catalog item updates via the **Load from File** button or individually via the **Create** button

Click **Submit for Approval** when catalog updates, additions, or changes are complete to automatically send for FHR's review







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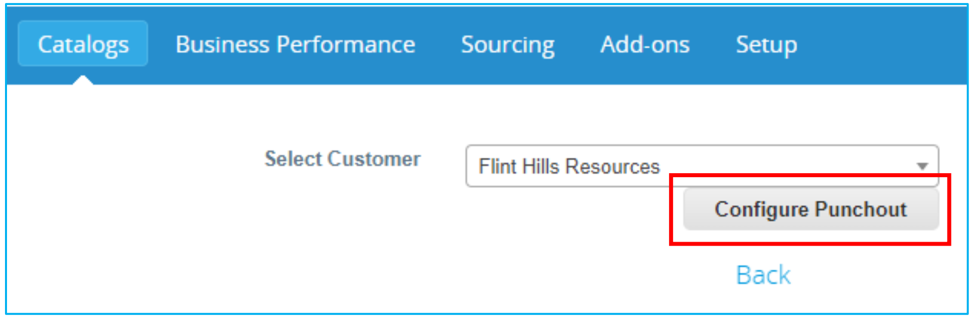
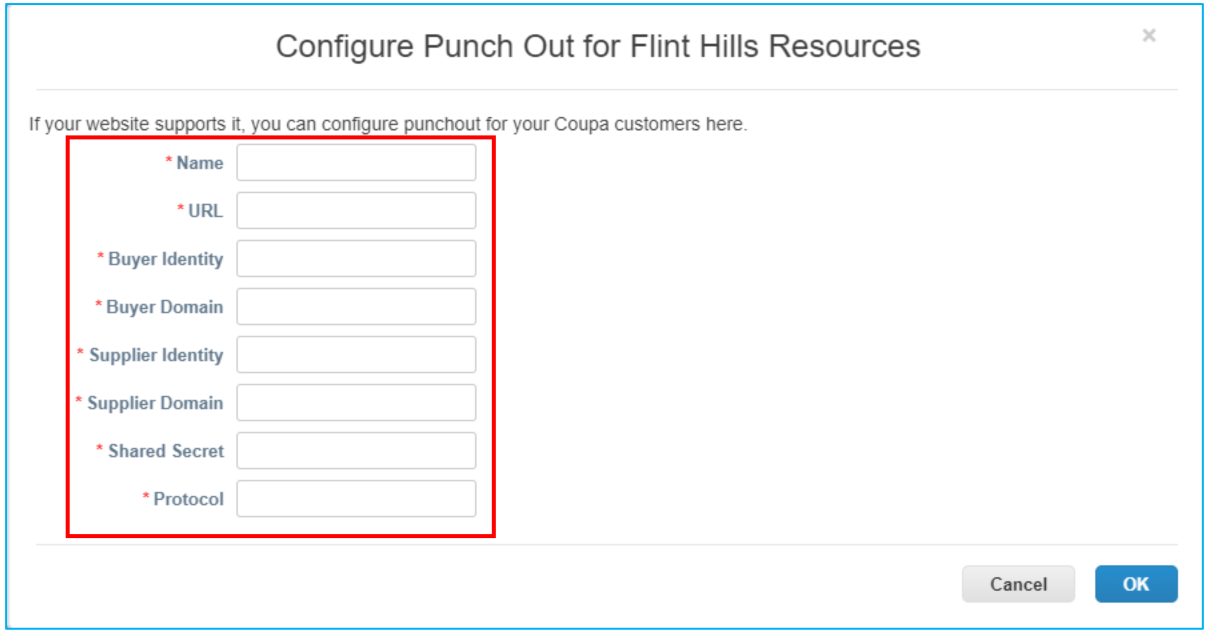
Viewing and Managing Catalogs

If applicable and you are a punch-out catalog capable supplier, fill out your punch-out catalog credentials in the form below by clicking the **Configure Punchout** button under the **Select Customer** dropdown menu at the top of the screen





03 SUPPLIER ACTIONABLE NOTIFICATIN (SAN)

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Supplier Actionable Notification (SAN) Overview

Suppliers that are reluctant to join another "network", remember another password, or go to another website to occasionally receive a purchase order (PO) or send an invoice, can transact with their Coupa customers without having to register for or log in to the Coupa Supplier Portal (CSP)

Supplier Actionable Notifications (SAN) allow suppliers to act on POs directly from email notifications for POs created in Coupa and have the options to acknowledge a PO, create an invoice, add a comment to a PO, or create a CSP account if they later decide to take advantage of the benefits of working with their customers through the CSP

Suppliers also get notifications after they submit an invoice, letting them know when their customers perform an action. This improves transparency and further reduces the need for suppliers to track down the status of their invoices through phone calls or emails

Note: Suppliers that are already registered for the CSP can also take advantage of SAN

Supplier Actionable Notification (SAN)/Email vs. Coupa Supplier Portal

Most Automated / Most Transactions ← → More Manual / Less Transactions

1 CSP

Transmitted PO goes directly into Supplier Portal account.

+

- Free of charge to suppliers
- Automated routing of invoices
- Centralized portal for instant visibility to purchase orders, invoice status, payment info etc.
- Enables easy order management and communication with lines of business
- Ideal for medium to high transaction volume

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- Suppliers have to re-enter standard organizational data (e.g. tax IDs) upon registration.

2 SAN

Transmitted via email directly to the associated supplier contact.

+

- Immediate notification after submitting invoices and when customers perform an action
- Reduced need to track down invoice status through calls or email
- Easy to use for suppliers with less transactions

−

- Does not allow submission of credit notes and FI invoices

Supplier Actionable Notification (SAN)/Email vs. Coupa Supplier Portal

	CSP	SAN
How does it work in Coupa?	○ If a supplier is linked to the Coupa Supplier Portal (CSP), they will be able to automatically view the purchase orders as soon as they are created in Coupa	○ PO transmission method is maintained in the supplier record for Coupa along with the associated email address ○ Each time a PO is created for that supplier, the PO is automatically emailed to the supplier's email address
When to enable?	○ High transaction volume suppliers	○ Low transaction volume suppliers when the supplier does not support joining the CSP

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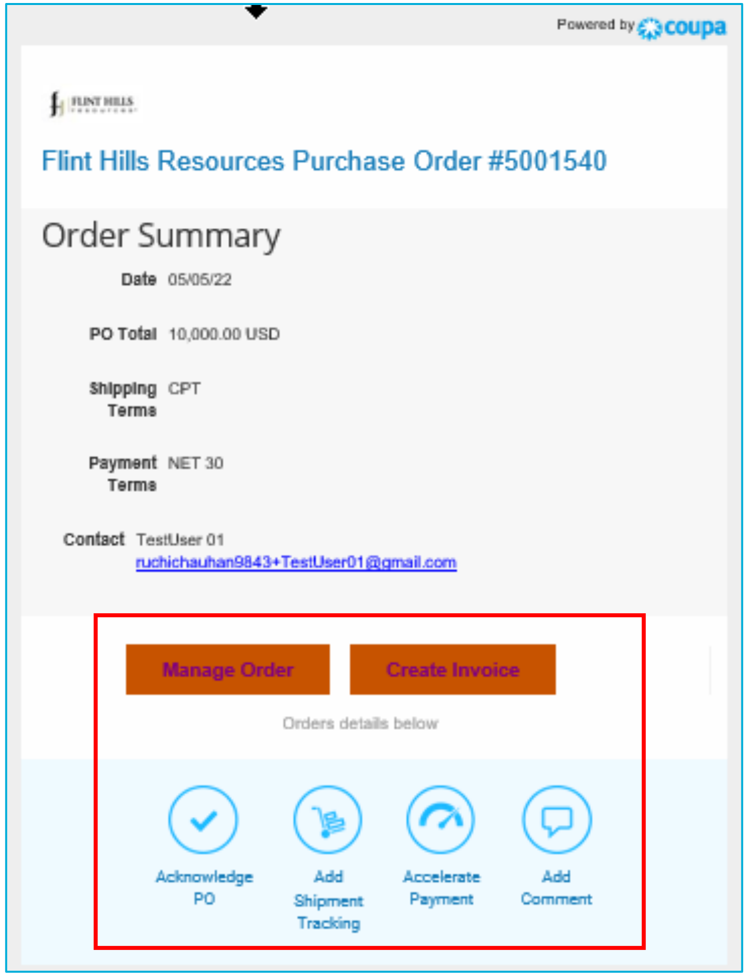
Supplier Actionable Notification (SAN)/Email Process

Using SAN, suppliers will be able to quickly **receive and acknowledge POs via email**

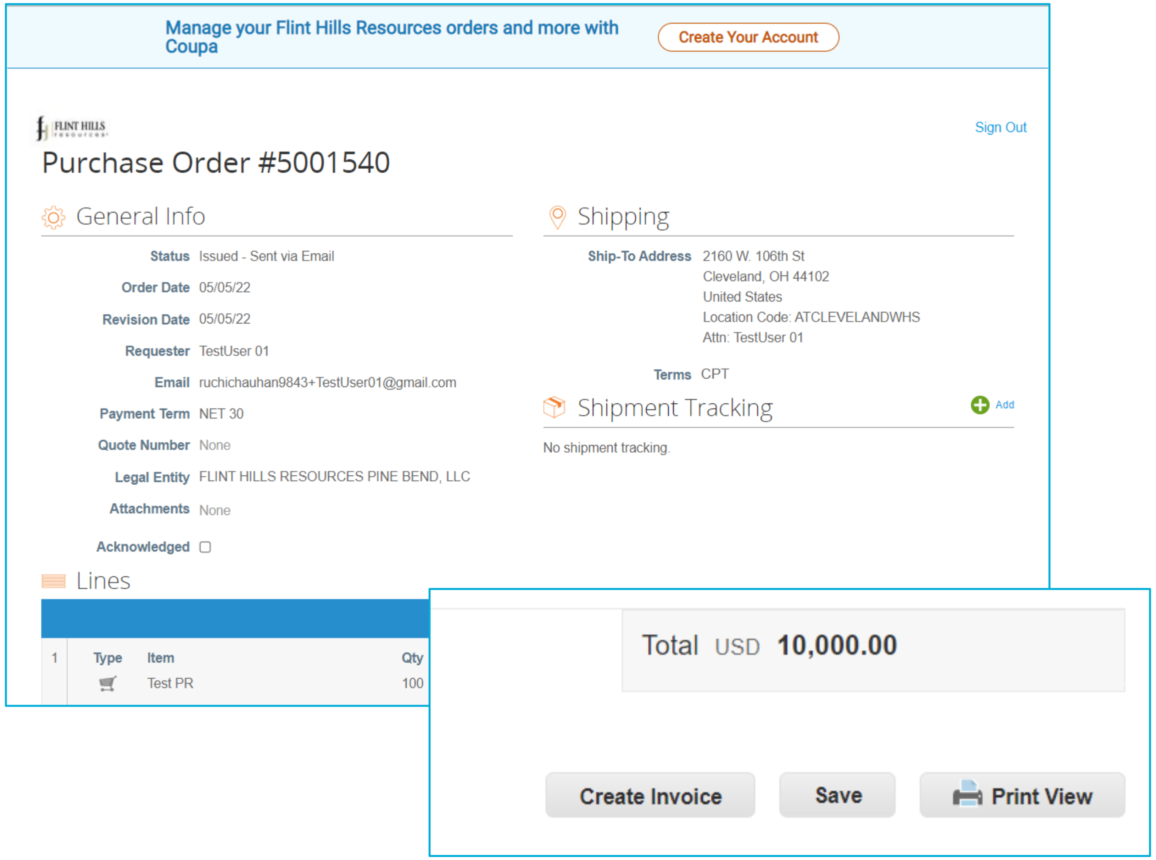
As a supplier, you will have the ability to act directly from your inbox when you receive a purchase order (PO) notification email

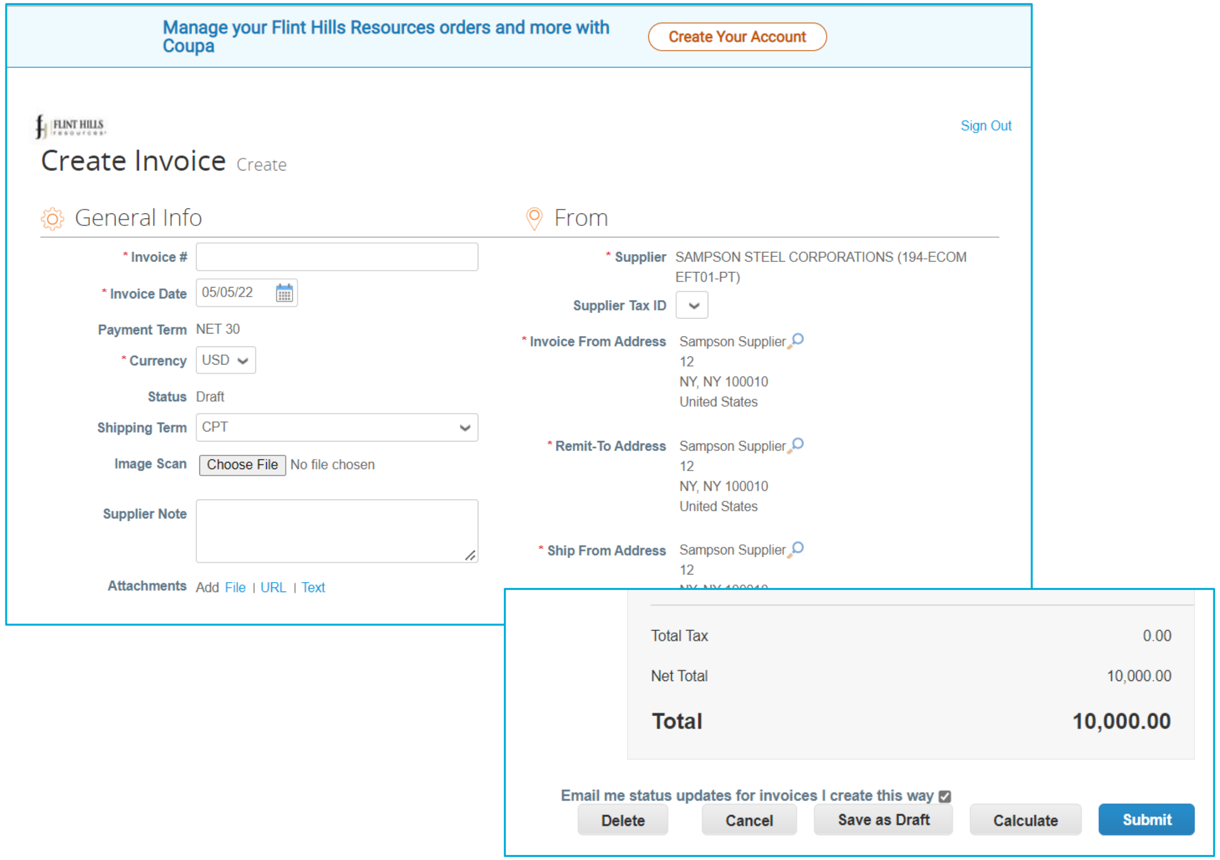
The notification email will include action buttons:

- **Acknowledge PO** – ability to acknowledge the incoming purchase order
- **Create Invoice** – ability to create invoice against a PO (PO flip)
- **Add Comment**



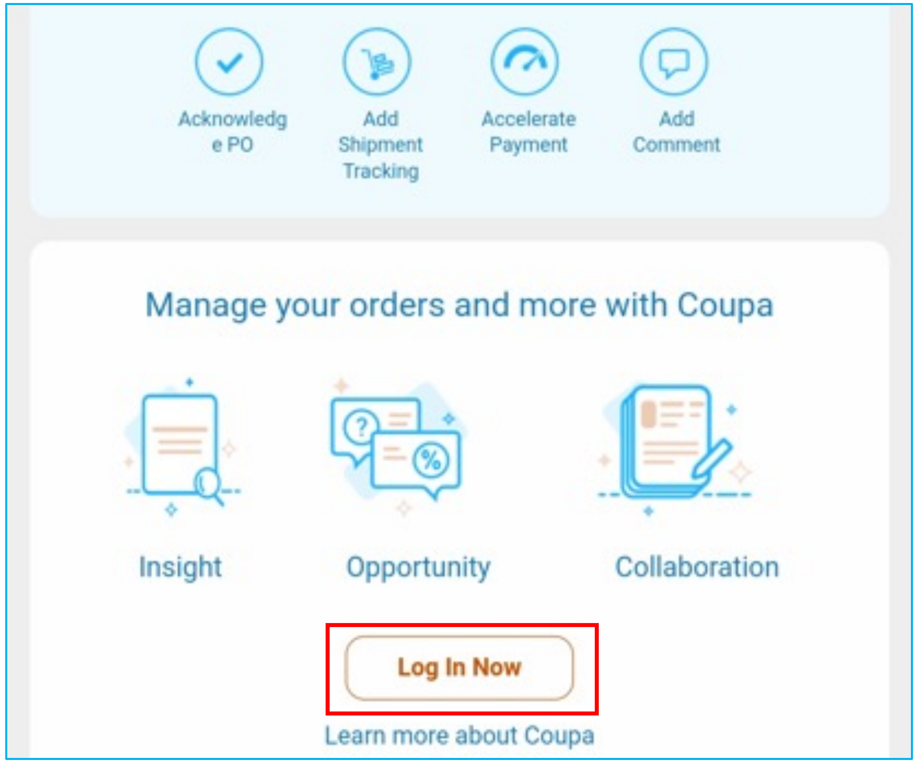
Supplier Actionable Notification (SAN)/Email Process





Supplier Actionable Notification (SAN)/Email Process

If applicable, suppliers who are already registered on the Coupa Supplier Portal can manage orders by clicking on the **Log In Now** button and access a PO via their CSP account directly from the email notification of the PO



04 CSP SUPPLIER ACTIVITIES

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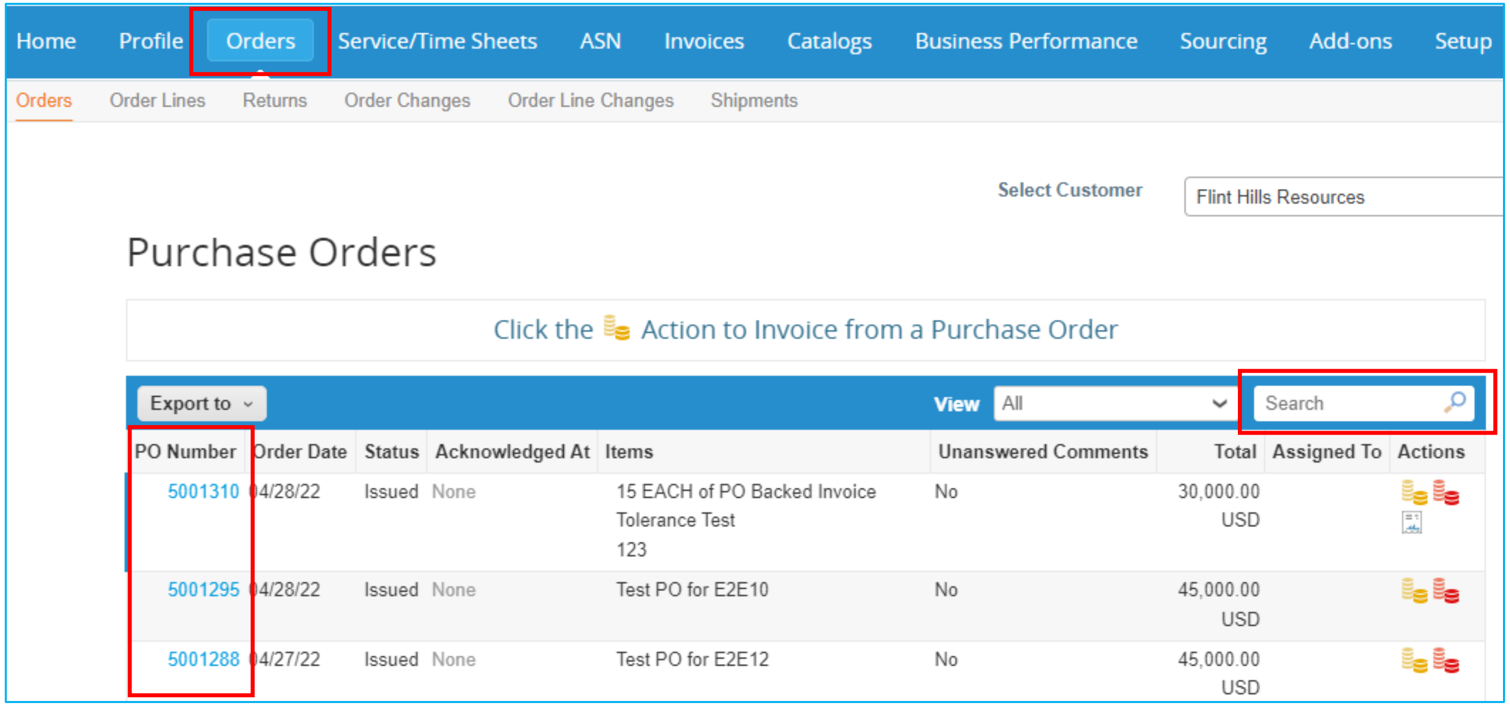
Receiving/Viewing a Purchase Order

Select the **Orders** tab 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 the **PO Number hyperlink** to view the complete PO details



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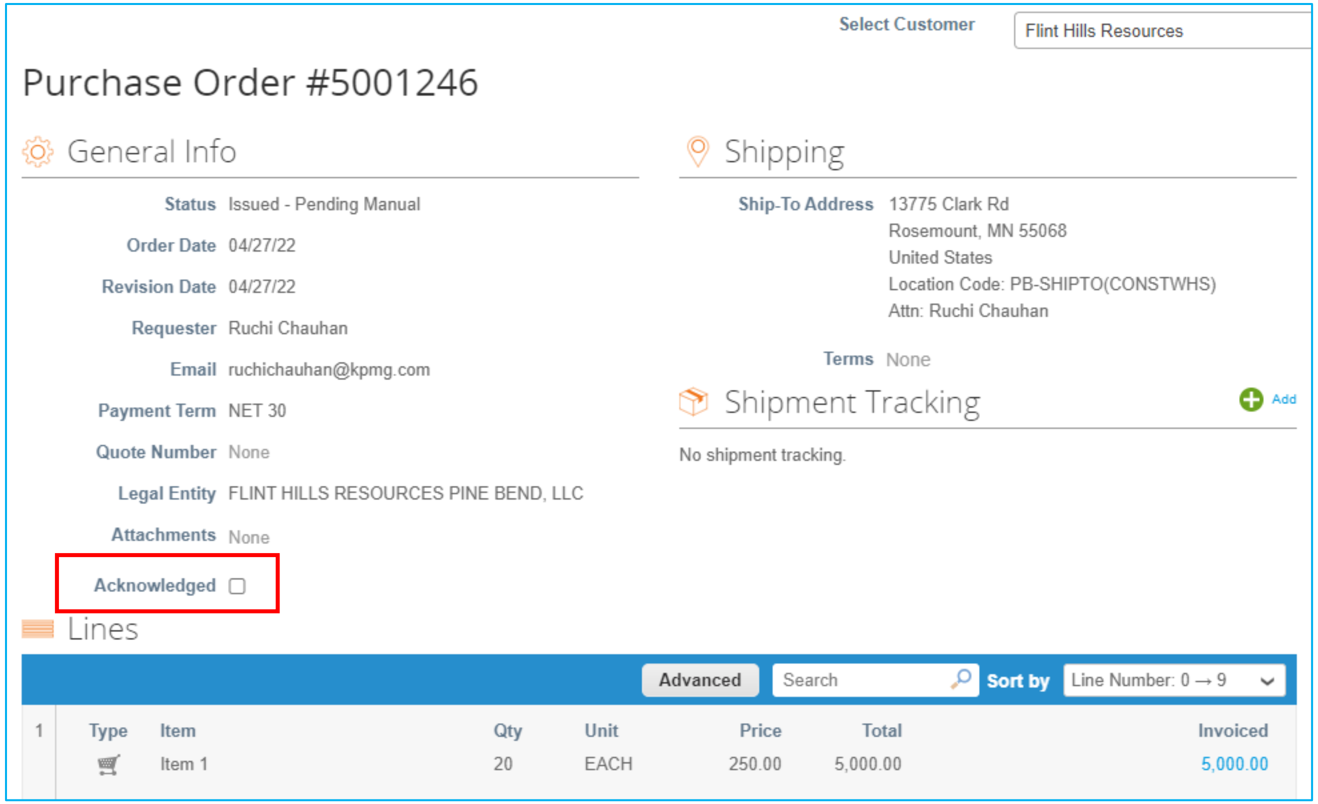
Acknowledge a Purchase Order

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

Note: User/Buyer will receive this supplier's acknowledgement in their Coupa system



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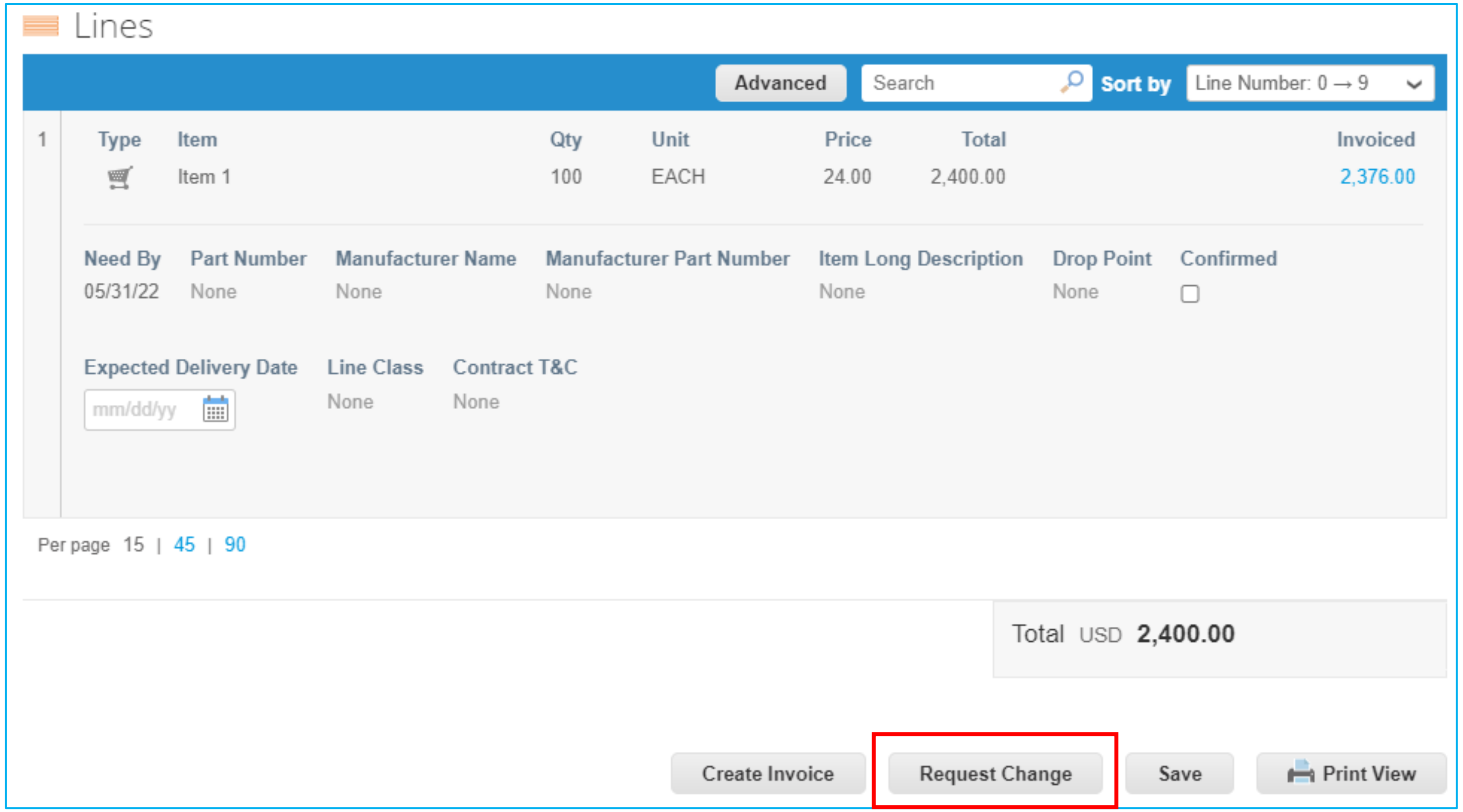
Requesting PO Changes – Requesting

You can request PO changes if your customer allows you to submit PO change requests and you have the Order Changes permission.

- At the bottom of the purchase order page, click **Request Change**



Note: Only one change request per PO can be pending approval at a time. You cannot submit multiple change requests while a PO has a current pending change approval

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Requesting PO Changes – Submitting

Edit the fields (Quantity/Price/Need By Date)

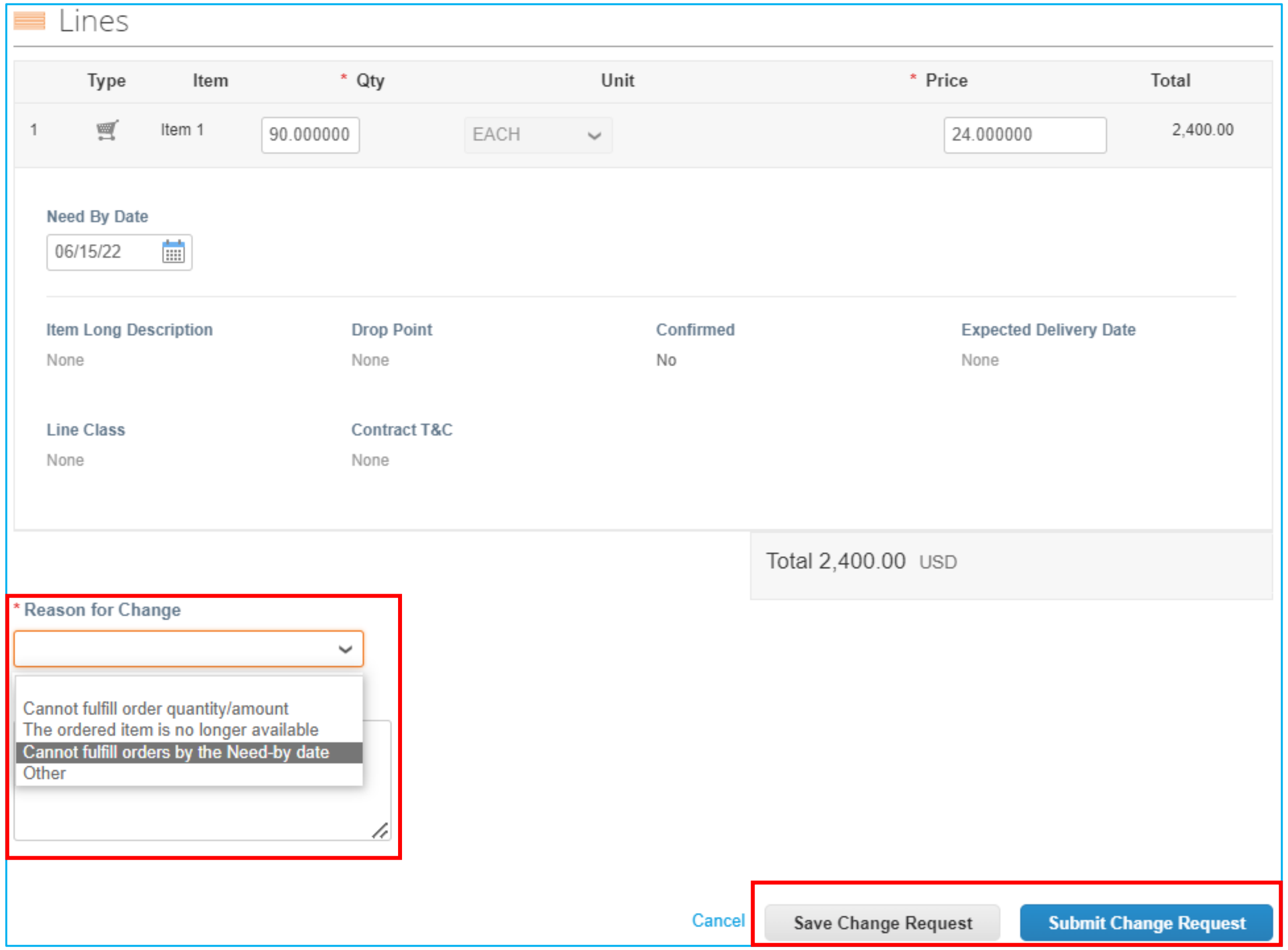
Select the **Reason for Change** from the dropdown

- If **Other** is selected, provide comments

Click **Submit Change Request**

You can also save the changes and submit later by clicking **Save Change Request**

Changes become effective when a change request is approved. When a PO change request is rejected, you will receive an **Order change request is rejected** notification



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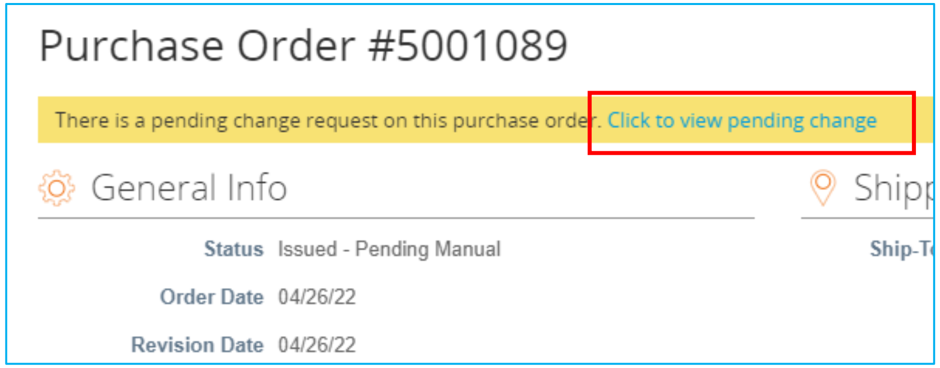
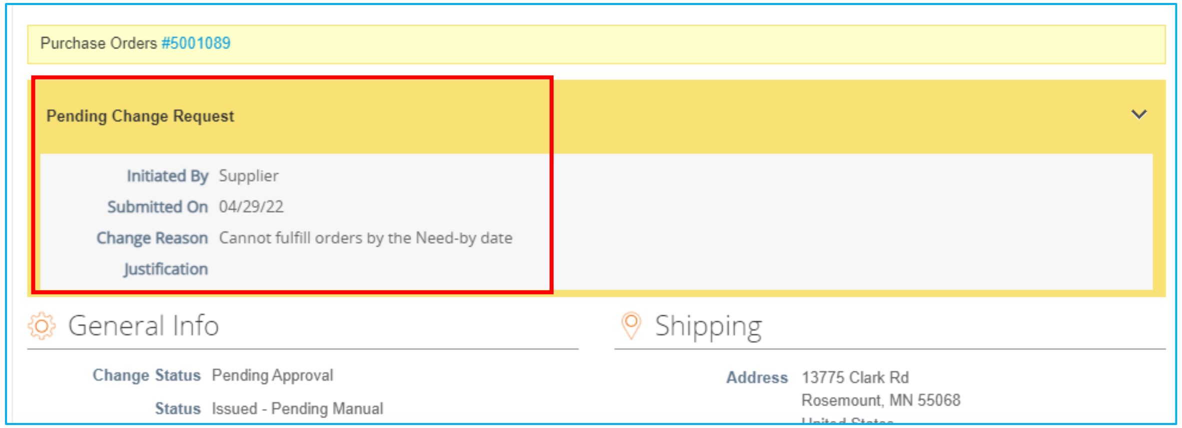
Requesting PO Changes - Reviewing and Withdrawing

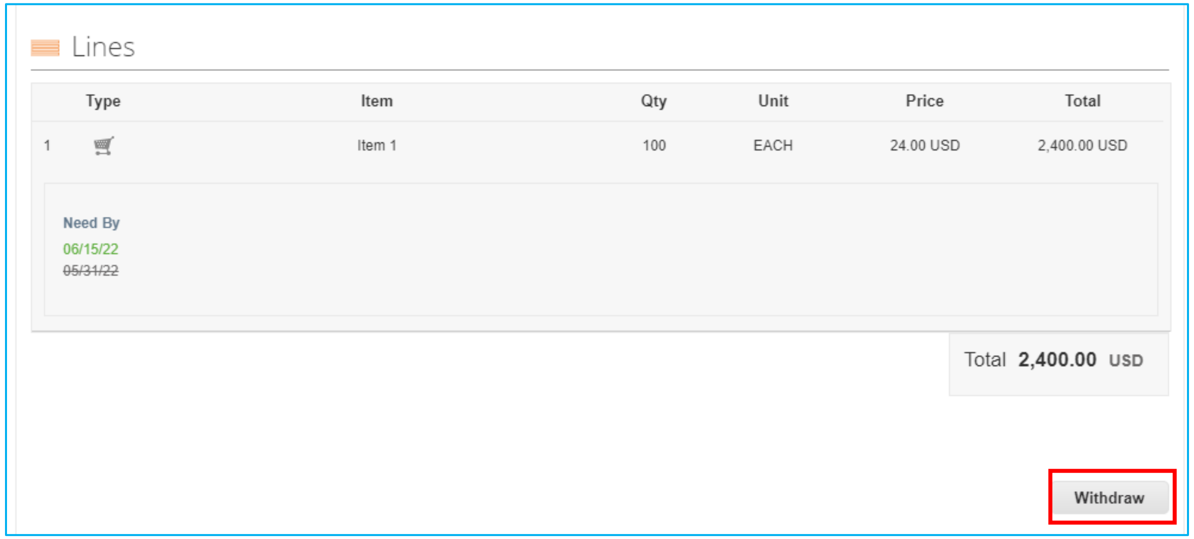
On the PO, select the **Click to view pending change hyperlink** (if any changes are pending approval)

At the top of the page, review **Pending Change Request** details

Scroll down and click **Withdraw** to withdraw the PO changes







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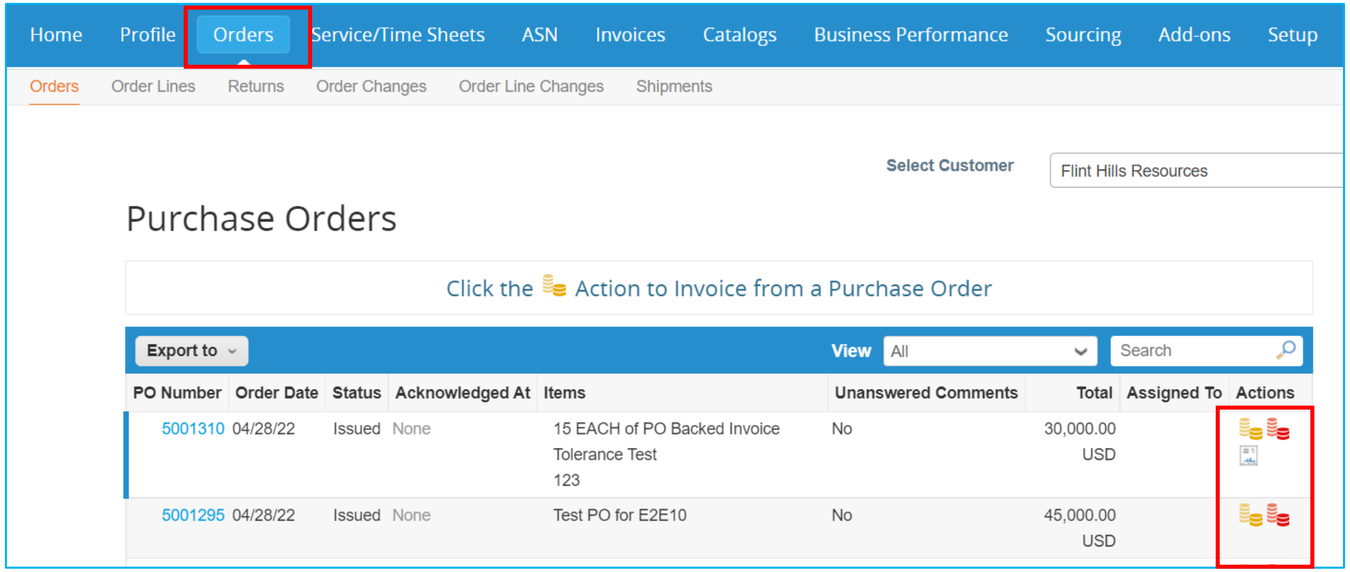
Creating PO-Backed Invoices

Click the **Orders** tab 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

NOTE: Clicking will create a credit note



The page will refresh to display the **Create Invoice** screen

If you have more than one Remit-To Address in your CSP profile, the **Choose Remit-To Address** pop-up window will display

- If there is only one Remit-To address stored in your profile, Coupa will default to that address and there will be no pop-up window to choose an address

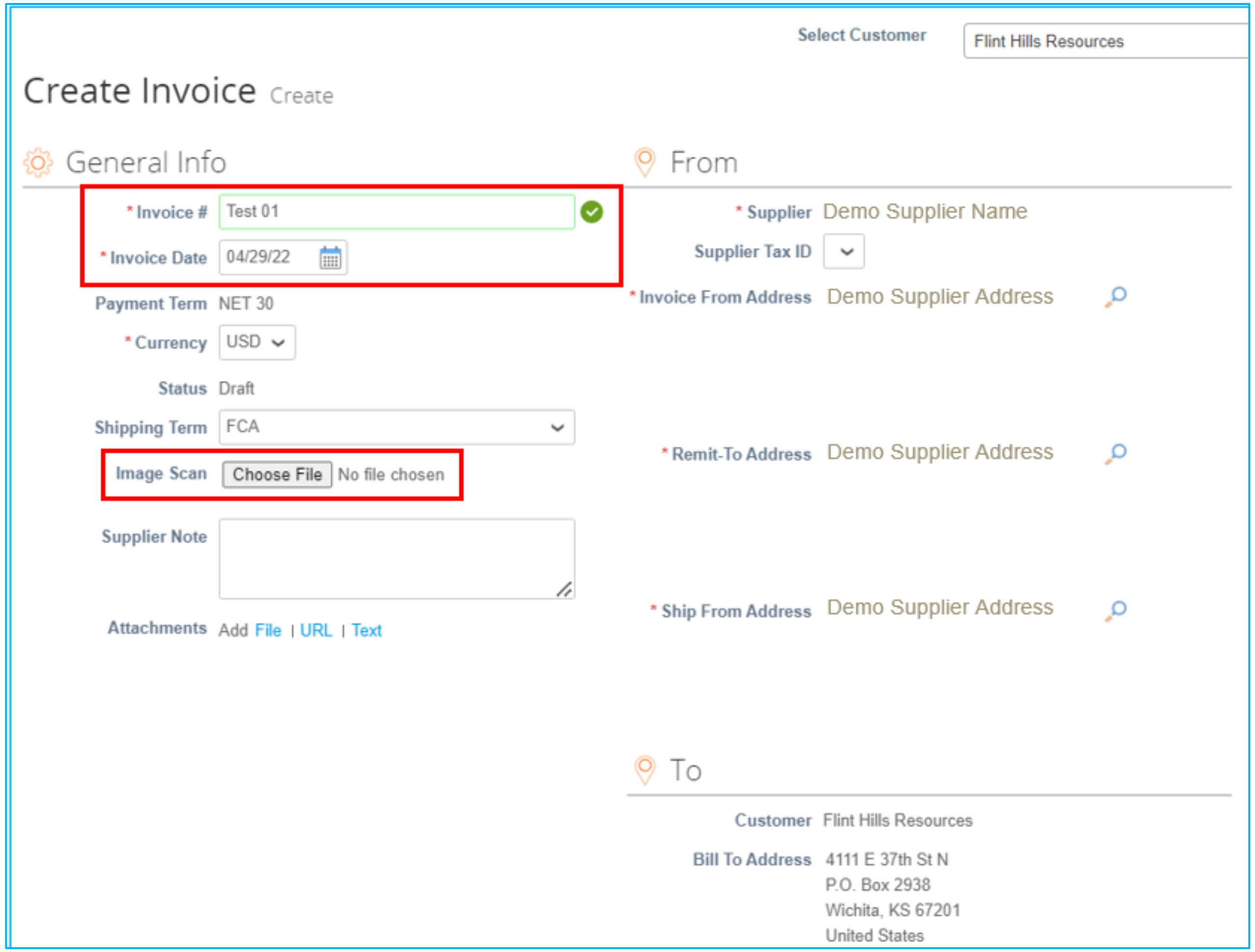
If the correct Remit-To Address does not appear, click the magnifying glass icon and then click the **Create** button to create new Remit-To address

Creating PO-Backed Invoices

On the invoice creation page, populate the required fields with the appropriate information (all required fields are indicated with an asterisk)

- Use your own invoice numbering convention for the **Invoice #** field
- Input the correct **Invoice Date**
- Attach your **Invoice Image Scan** (optional)
- Verify auto populated invoice information at the header and line levels and adjust as necessary

NOTE: Invoice scan should be a JPG, PNG, TIFF, PDF or GIF file

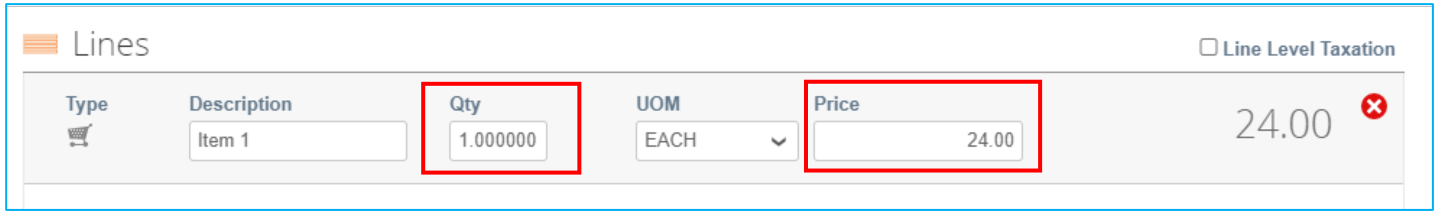


Creating PO-Backed Invoices

For a Goods PO:

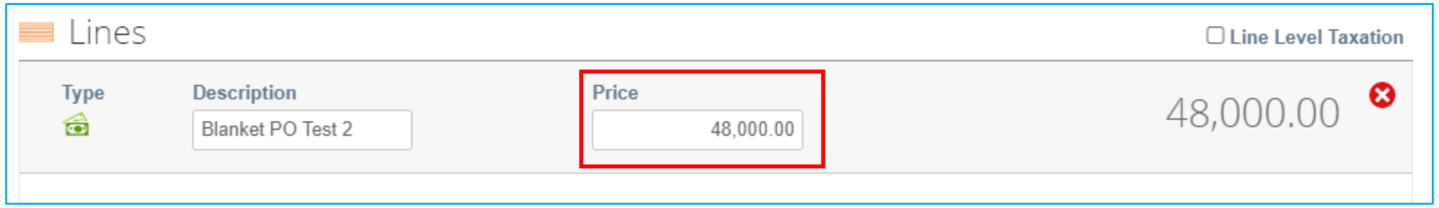
- Update the price in the **Price** field, if needed
- Update the quantity in the **Quantity** field, if needed

Note: It is not recommended to change the catalog/order unit price



For a Services PO:

- Update the price in the **Price** field, if needed



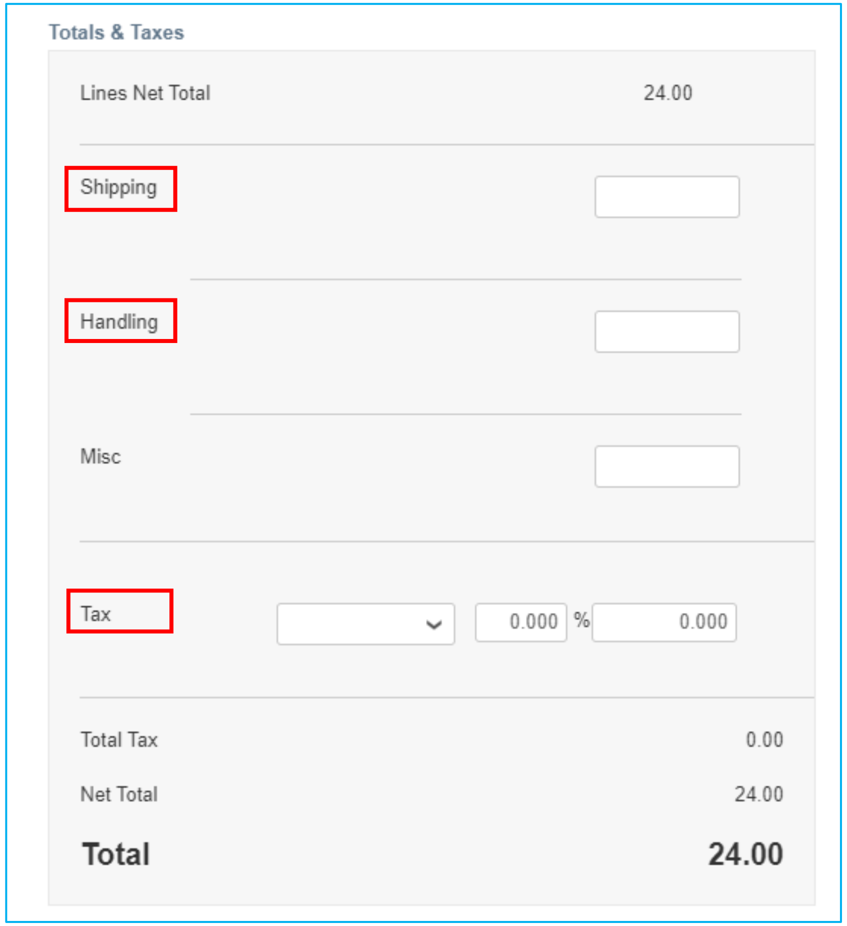
Creating PO-Backed Invoices

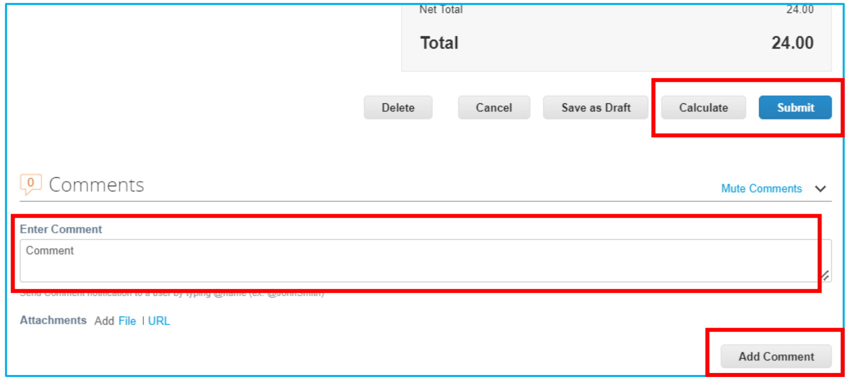
If applicable, add any **Shipping**, **Handling** and **Tax** information

- You can add applicable tax in the proper section using 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

Enter any necessary comments for Flint Hills Resources, then click **Add Comment**

When you have populated all information on the invoice, click **Submit**



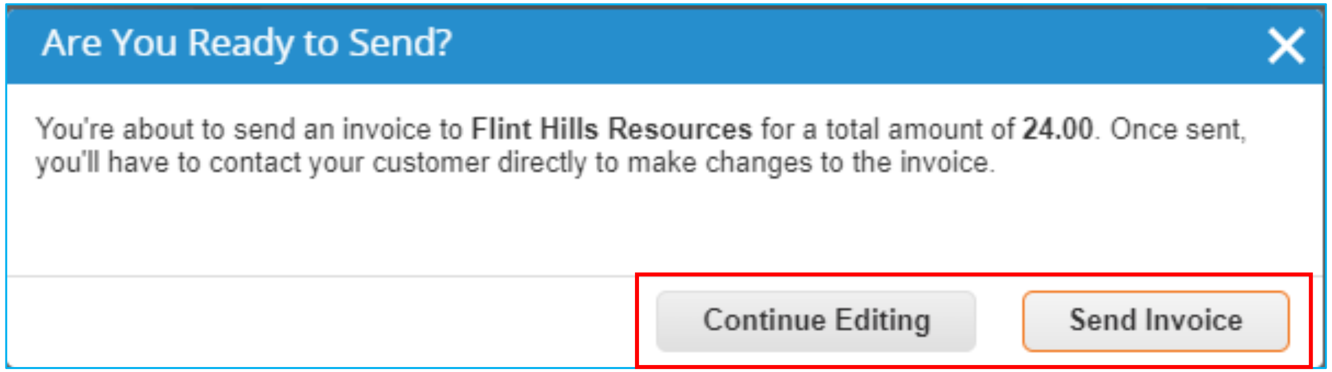


Creating PO-Backed Invoices

After you click Submit, a pop-up window will appear to confirm if you are ready to send the invoice since invoices cannot be changed via email or CSP once submitted

If you wish to go back to edit, click Continue Editing

Click Send Invoice to send the confirmed and complete invoice to Flint Hills Resources



NOTE: User will be taken back to the invoice page after sending the invoice

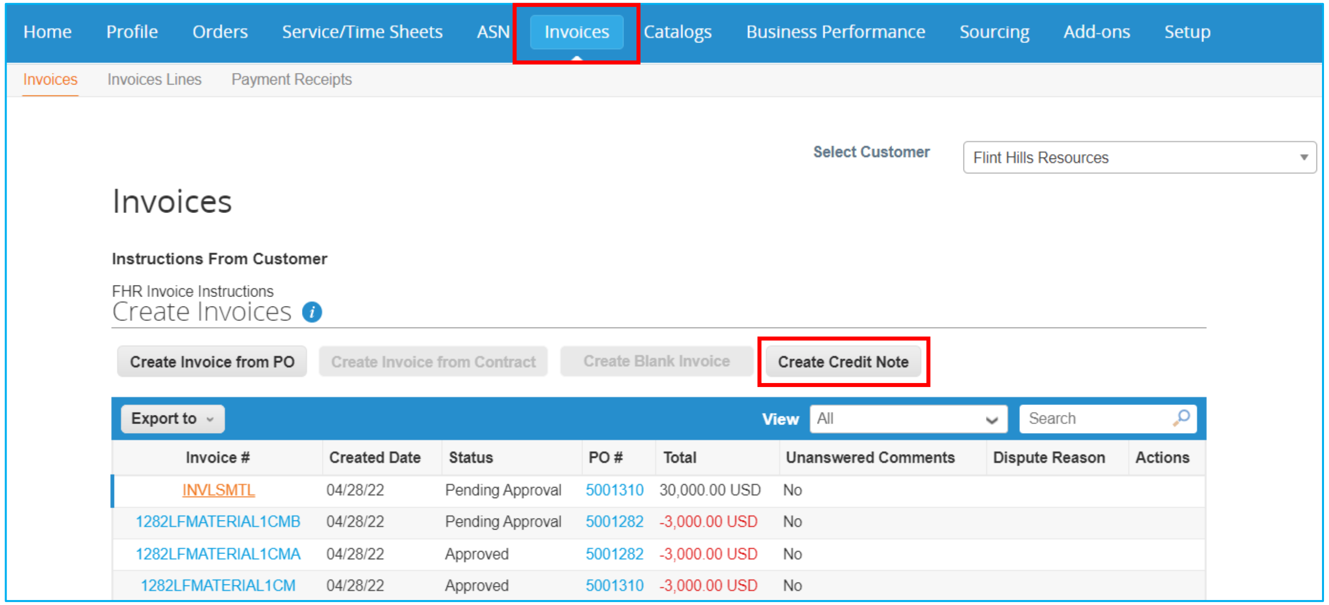
Creating Credit Notes

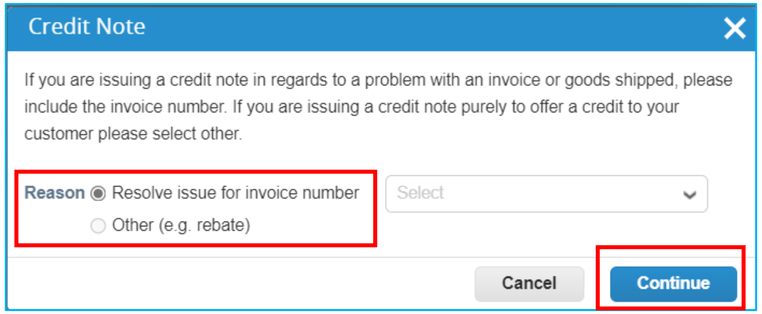
Click the **Invoices** tab from the top menu bar

Click on the **Create Credit Note** button

Select the reason by selecting the invoice/contract against which the credit will be issued in the credit note pop-up window

Click **Continue**





***NOTE**: Credit Notes can be also be created by locating a PO and selecting the [icon] from the Orders page*

FLINT HILLS resources

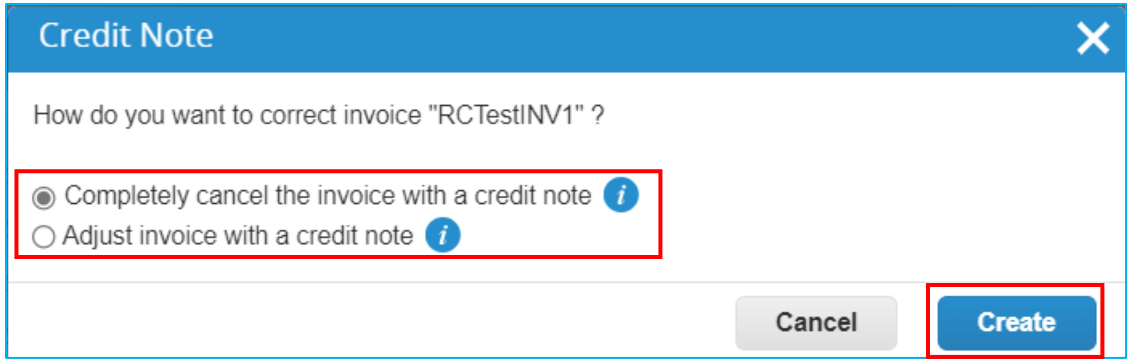
Creating Credit Notes

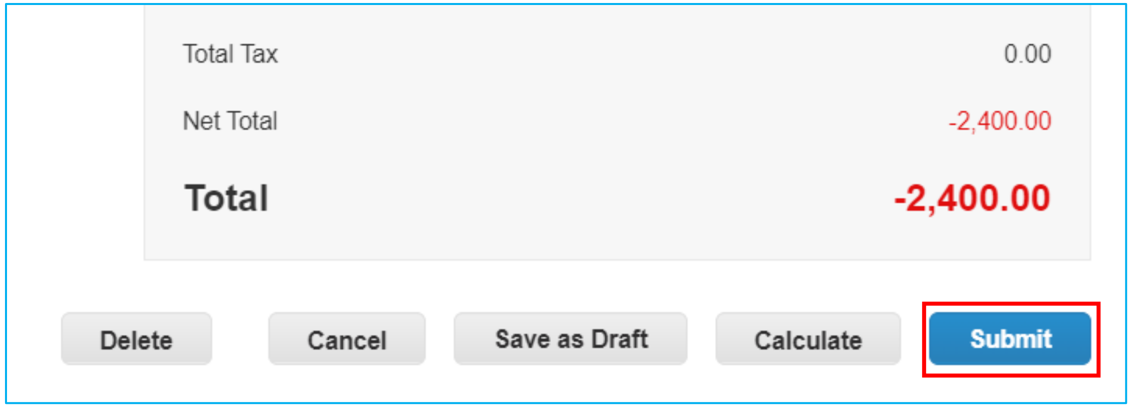
Select the credit note correction type and click **Create**

Complete all the necessary information (all required fields are indicated with an asterisk) on the credit note page

- Adding original invoice number and original invoice date values help to link the credit note to a specific invoice

Scroll down and click **Submit**





NOTE: Credit Note total should be negative

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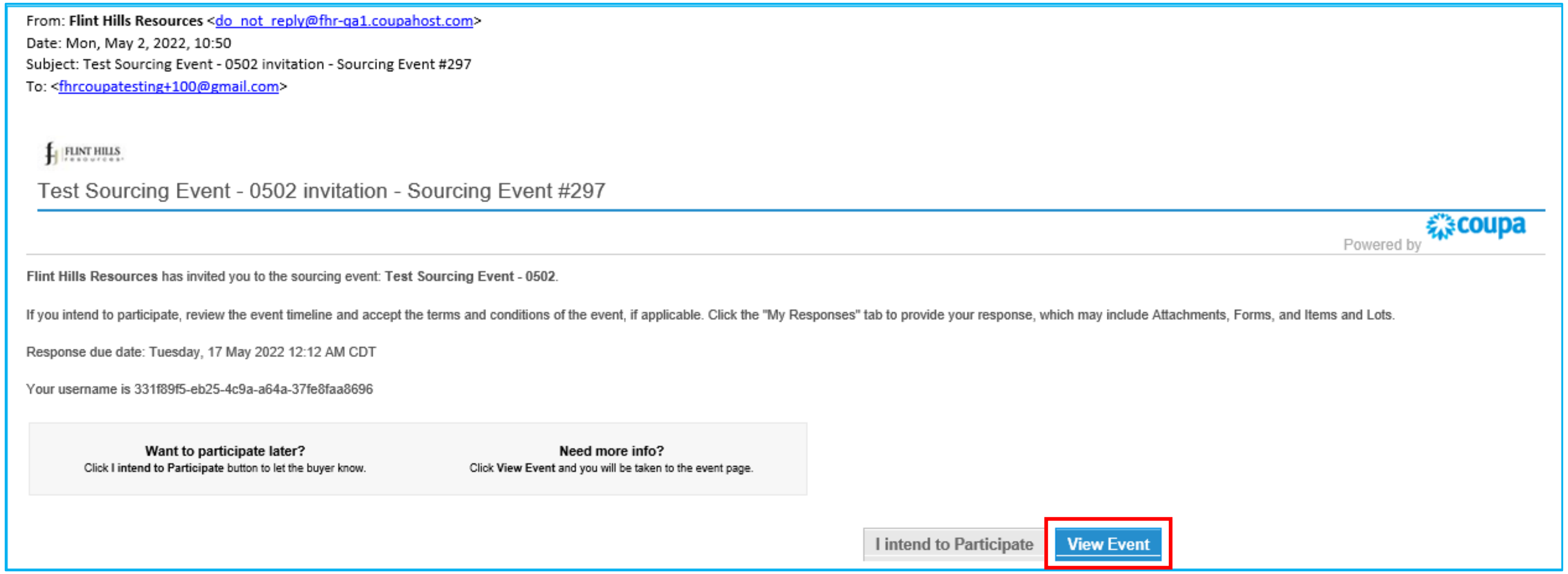
How to respond to Sourcing Events

Sourcing events begin when a Sourcing Manager sends a sourcing invitation to suppliers

Suppliers receive an email from the buying organization to participate in a sourcing event

Open the email and click on **View Event**



From: **Flint Hills Resources** <do_not_reply@fhr-qa1.coupahost.com>
Date: Mon, May 2, 2022, 10:50
Subject: Test Sourcing Event - 0502 invitation - Sourcing Event #297
To: <fhrcoupatesting+100@gmail.com>

Test Sourcing Event - 0502 invitation - Sourcing Event #297

Powered by coupa

Flint Hills Resources has invited you to the sourcing event: **Test Sourcing Event - 0502**.

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, Forms, and Items and Lots.

Response due date: Tuesday, 17 May 2022 12:12 AM CDT

Your username is 331f89f5-eb25-4c9a-a64a-37fe8faa8696

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

How to respond to Sourcing Events

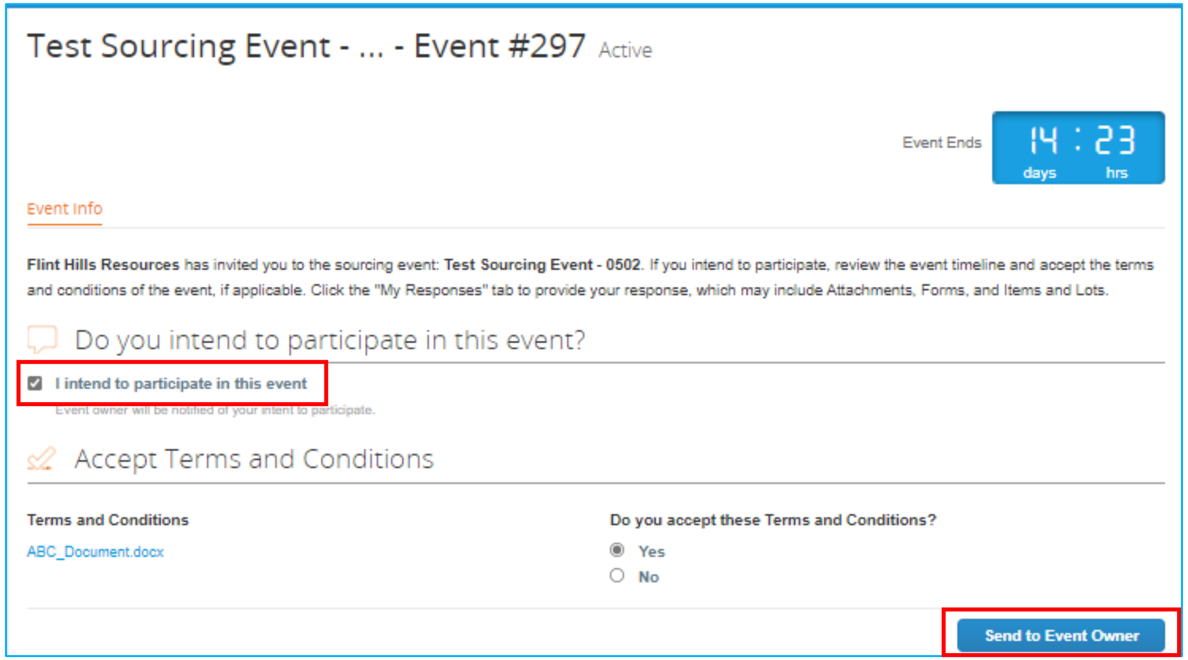
Follow the instructions in the email to go to the event

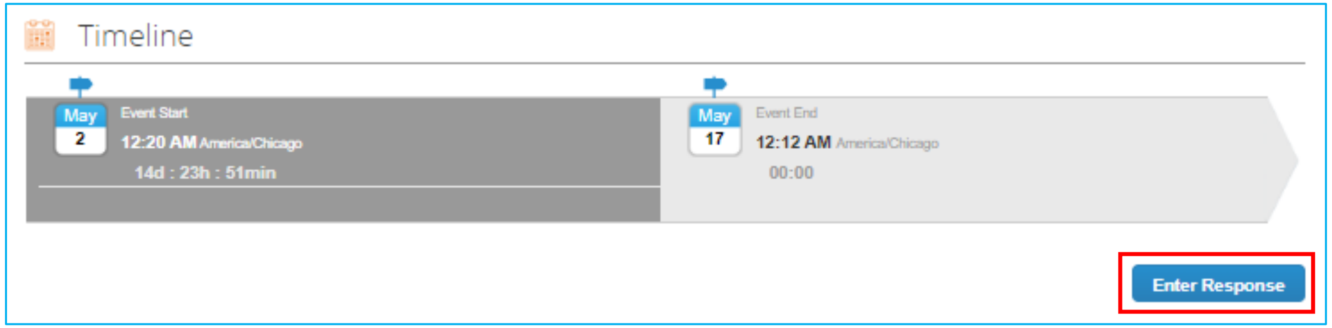
Check the box **I intend to participate in this event**

Review and accept the **Terms and Conditions**

Click on **Send to Event Owner**

Click on the **Enter Response** button at the bottom of the page to view details of the event





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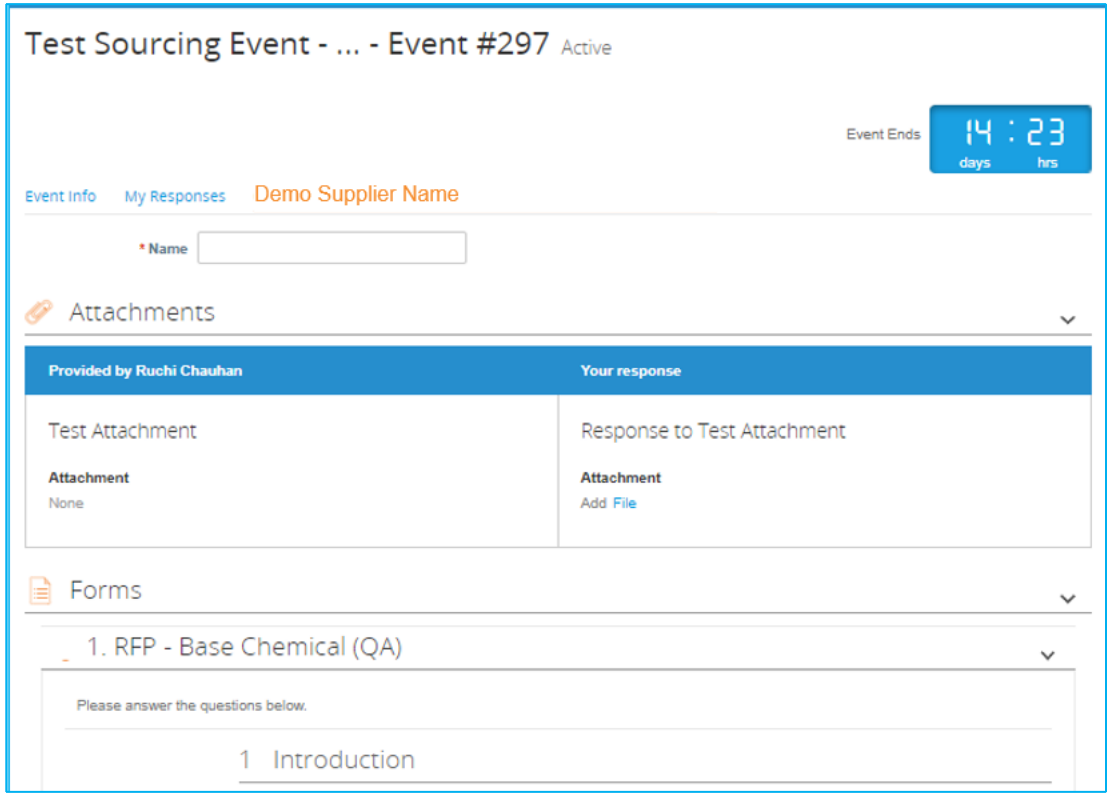
How to respond to Sourcing Events

Provide all the details on the fields marked with asterisk sign (*)

Depending on the event, you can see one or more of the following sections:

- Attachments - files you receive from the buyer that you may need to send back
- Questionnaires – questions that the buyer needs you to answer
- Items and Lots - pricing section

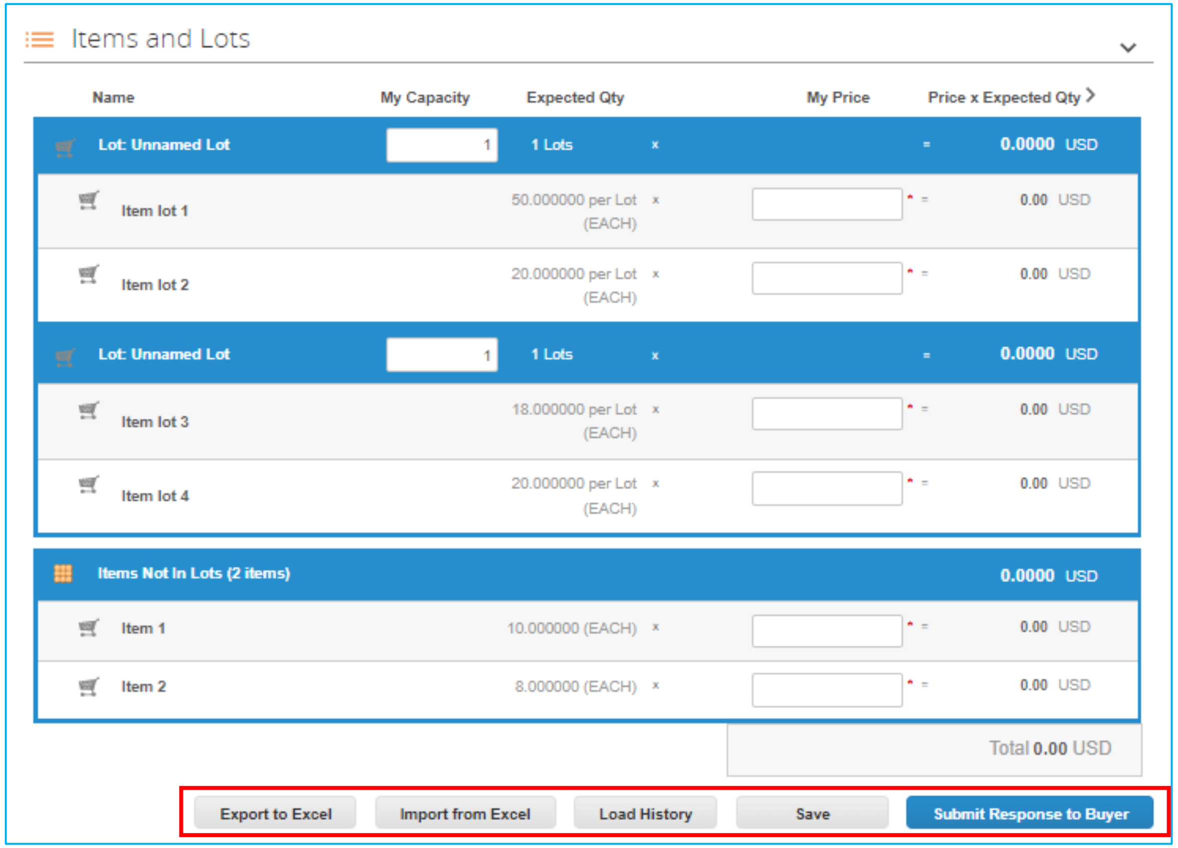


*Notes: Coupa Sourcing does not support **.zip or .exe attachment files** for security reasons*

How to respond to Sourcing Events

You have the following options to respond:

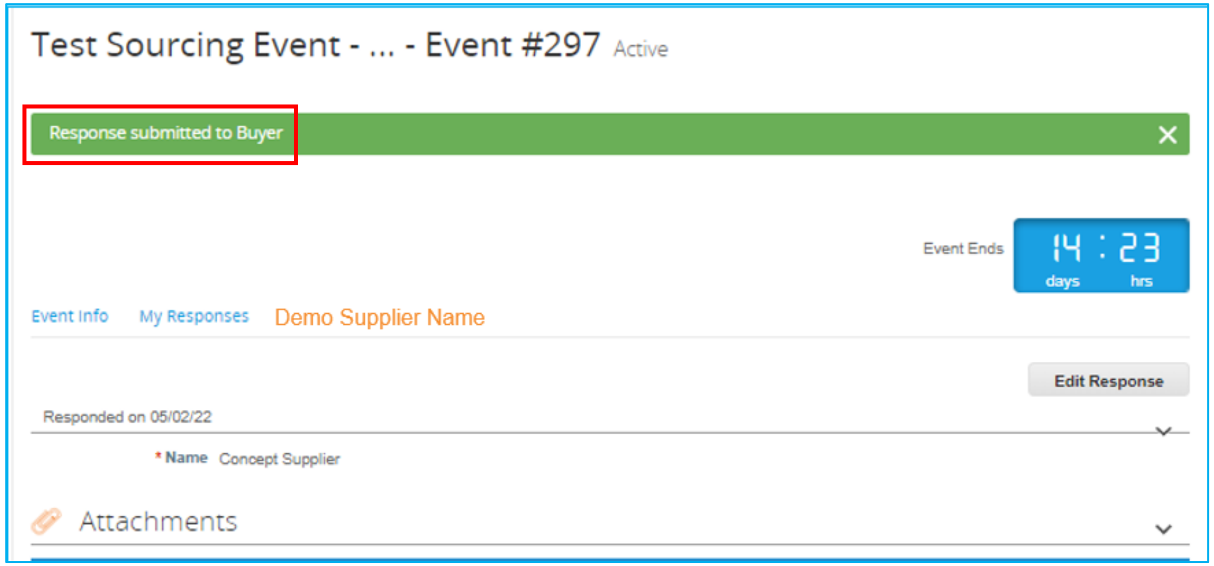
- Export to Excel - exports the questionnaires and the items and lots into Excel where you can fill in your responses
- Import from Excel - uploads your Excel responses
- Save - saves your responses, but does not submit them to the buyer
- Submit Response to Buyer - submits your responses. You can change your responses before the sourcing event is over and re-submit if needed

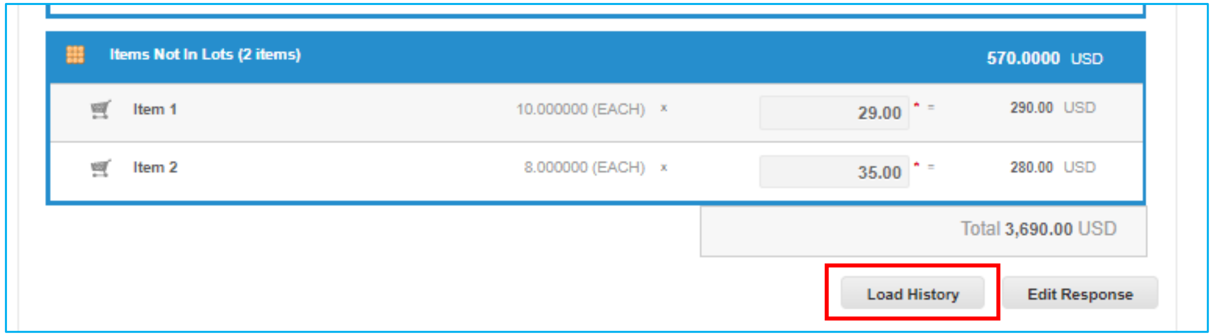


How to respond to Sourcing Events

After submitting your response, a **Response submitted to Buyer** notification is displayed as a green banner across the top of the screen

To check and confirm if your response was received, check the **History** at the bottom of the page by clicking on **Load History**



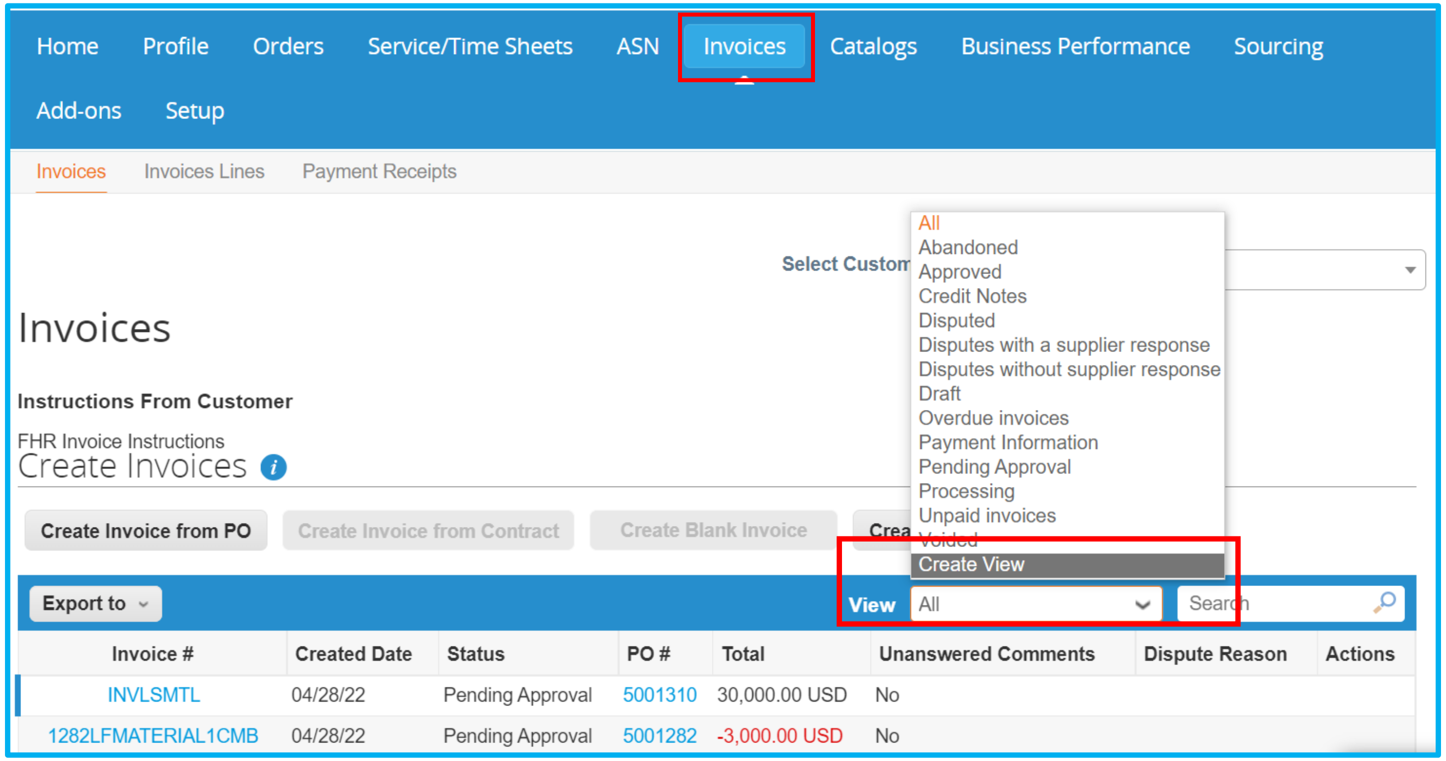


05 REPORTING

Creating Custom Views

You can create your own custom view on any object (Orders, Order Lines, Invoices, Catalogs)

- Click on the **Invoices** tab
- Select **Create View** option from **View** dropdown menu



Creating Custom Views

Name the view

Select **Visibility** (Only Me will limit the view to yourself)

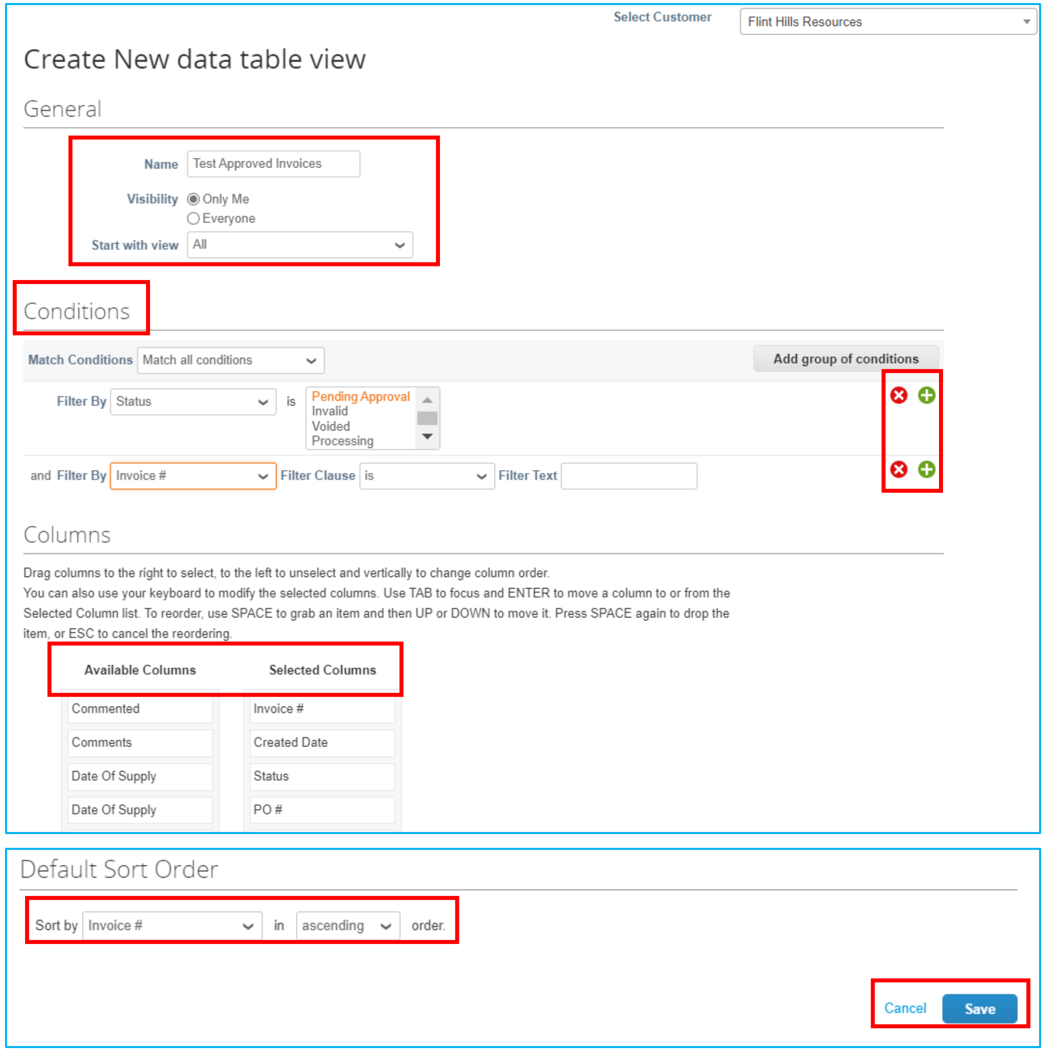
With **Start with view**, you can create your view with reference to other existing views

Provide required **Conditions**. By clicking on the green plus icon you can add conditions. Clicking on red cross icon allows you to delete conditions

Drag columns from the **Available Column** to the **Selected Column** to include the columns in the view on the main object table

Select **Sort by** (if needed)

Click **Save**



06 PAYMENTS

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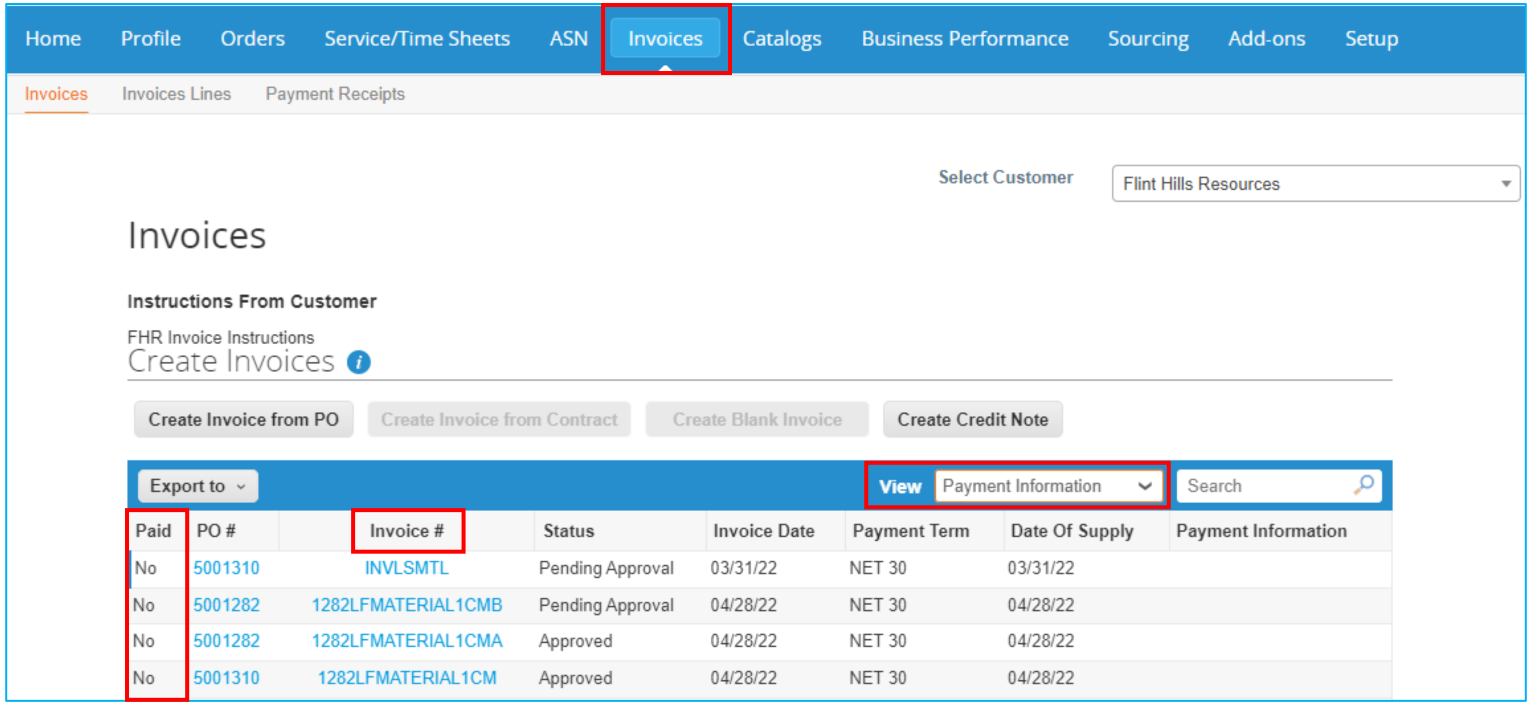
Supplier Payment Information

Click on the **Invoice** Tab

Using the **Payment Information** view, you can check on invoice payment status

The **Paid** column will tell you whether you have been paid or not

You can also click on the **invoice number hyperlink** to see more detailed information



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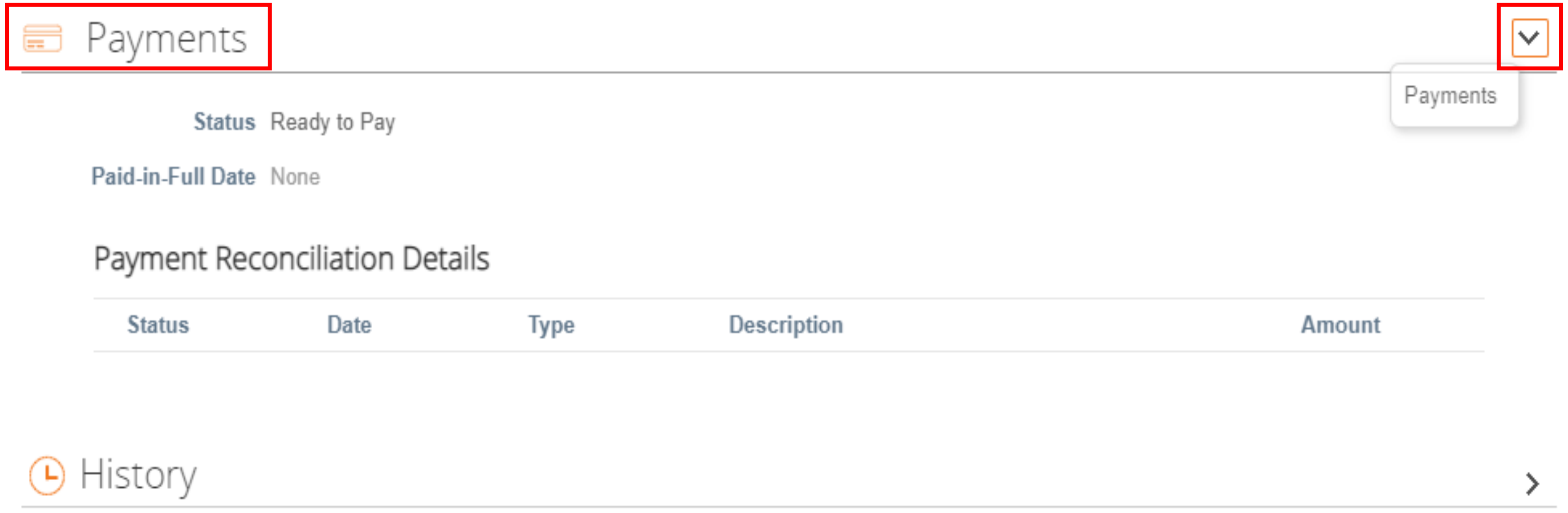
Supplier Payment Information

Scroll down to the bottom of the page for payment information and click the **Payments** arrow to review more details.



07 NEXT STEPS

Next Steps for CSP Enablement

Make sure to accept the Coupa Supplier Portal email invitation

Verify and complete CSP profile and account information after invitation acceptance, along with any information update requests

Review training and onboarding materials and communications and complete requested supplier information

- i.e., Primary Contact information, PO email, required certifications or documentation

Align with your Accounts Receivable team for invoicing, if you have not already

Contact FHR’s Procurement Team to begin punchout or hosted catalog set up prior to adding any catalog information in the CSP

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 Login:

- https://supplier.coupahost.com/

If you require any further information, contact FHR’s supplier enablement team at:

- supplierenablement@fhr.com