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Coupa Supplier Portal:

Quick Reference Guide – For Suppliers

ODFJELL

coupa

PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

Overview

- Get Started with the CSP

- Navigation
  - Coupa Supplier Portal (CSP)
  - Customer Invitation (Odfjell)
  - Create Your Account
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  - Getting Help
  - Manage Your Account
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- Disputed Invoices
- ASNs
- Catalogs – Punchout/Hosted

Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Odfjell using Coupa.

- Signing up to the CSP is **critical** to gain access to purchase orders and process invoices
  - An email will be sent that will have directions on how to register to the CSP

- Suppliers will have the ability to manage various content and settings for your Odfjell profile.

- Some of the content and information that is available to manage is:
  - Manage Company Information
  - View purchase orders

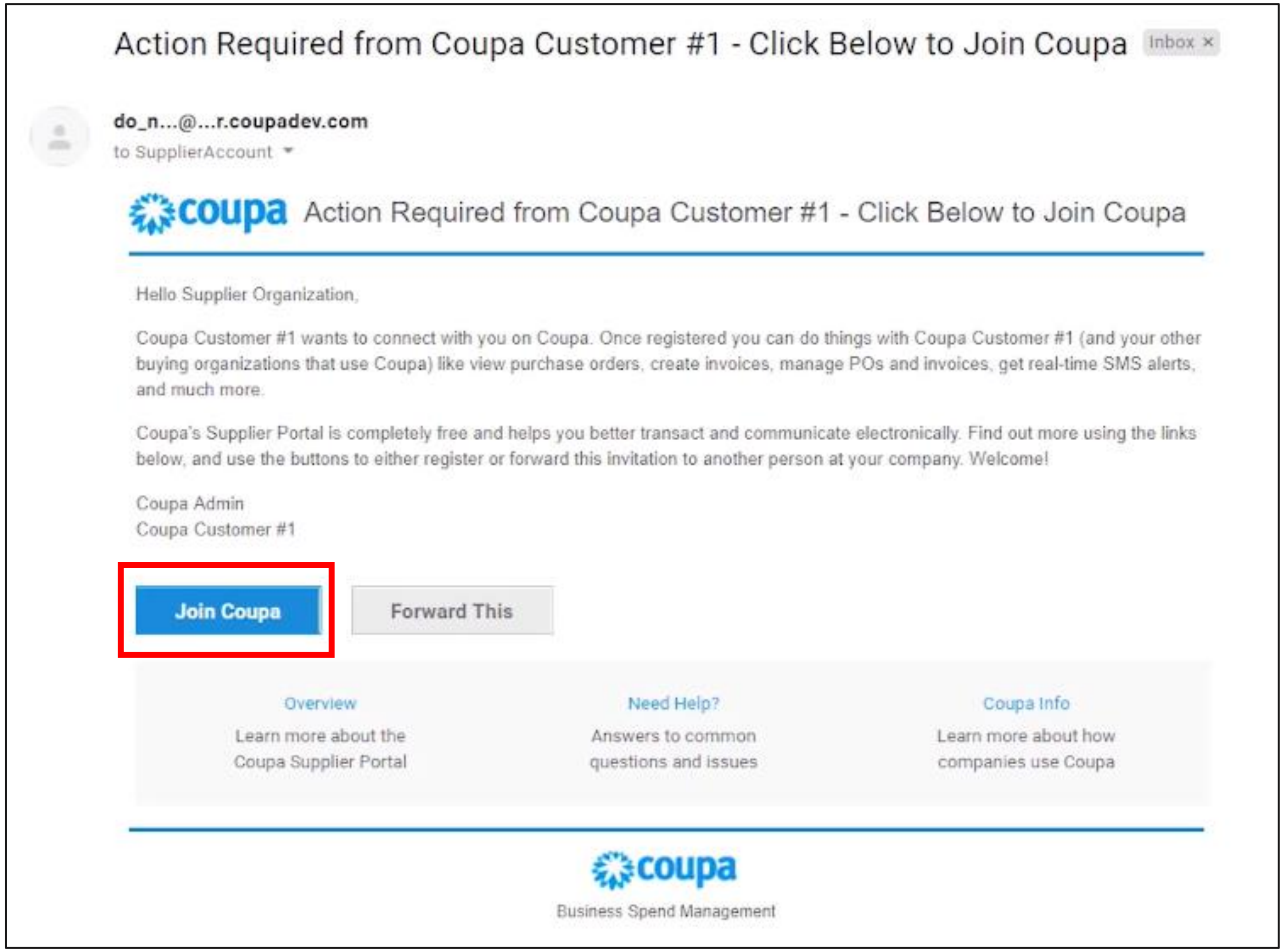
- The easiest way to get set up to use the CSP is to ask Odfjell for an invitation.

- Once you accept the invitation and register, you'll be automatically connected to Odfjell.

Customer Invitation

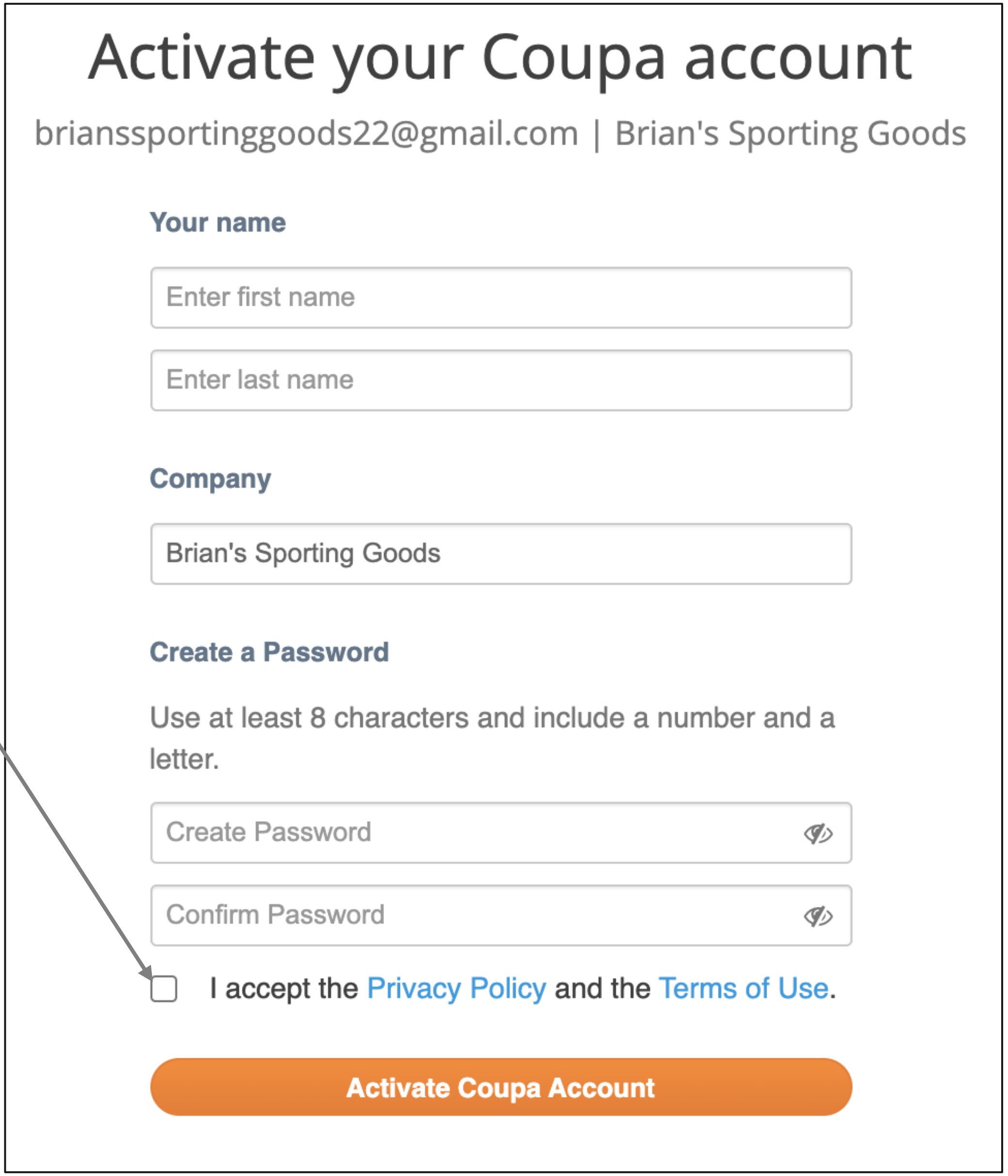
Invitation from Odfjell

- You will receive an e-mail from our Coupa system with a unique link to join the Coupa Supplier Portal.
- Once you click on the **Join Coupa** button, you will be directed to the CSP to register your account.
- Save https://supplier.coupahost.com/ as a favorites link for quick access when you need to return to the site.



Create Your Account

- After following the link from the invitation email, fill in the mandatory fields to provide basic information for your account and your company's public profile.
- To create a CSP account, you must also accept the Privacy Policy and terms of use.
- By default, this account is the admin account for your Company. Once set up, you can add users and assign them roles, including account administration.
- You can invite others any time by entering their email address in the Forward email field in the Forward your invitation section and clicking Submit.



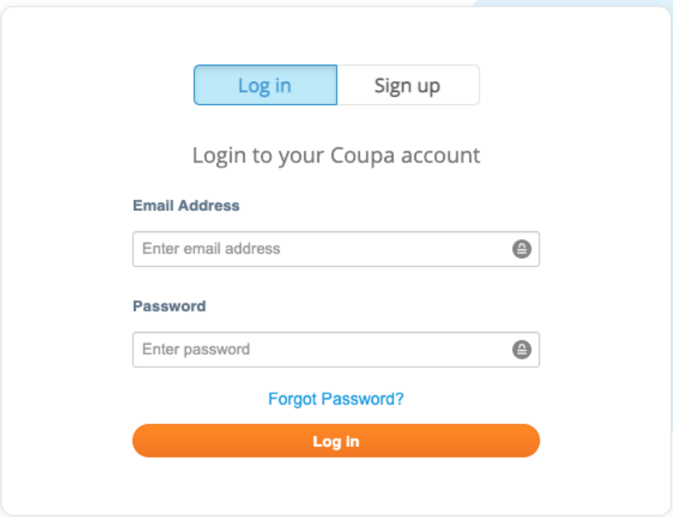
Login to the CSP

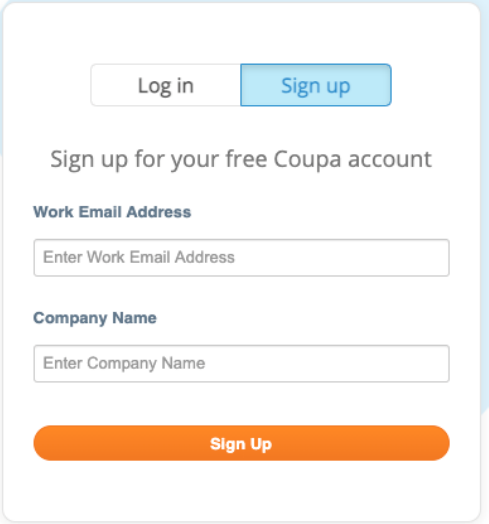
Self-created invitation

- Register to join the CSP at: https://supplier.coupahost.com
- Once registered, let Odfjell know you're on the CSP, and give them the email address you used to register. Odfjell needs it to get you set up within Coupa.
- If you're already on the CSP with another Coupa customer, just give your CSP email address to the Odfjell Supplier Enablement team and they'll do the rest.

Customer-created invitation

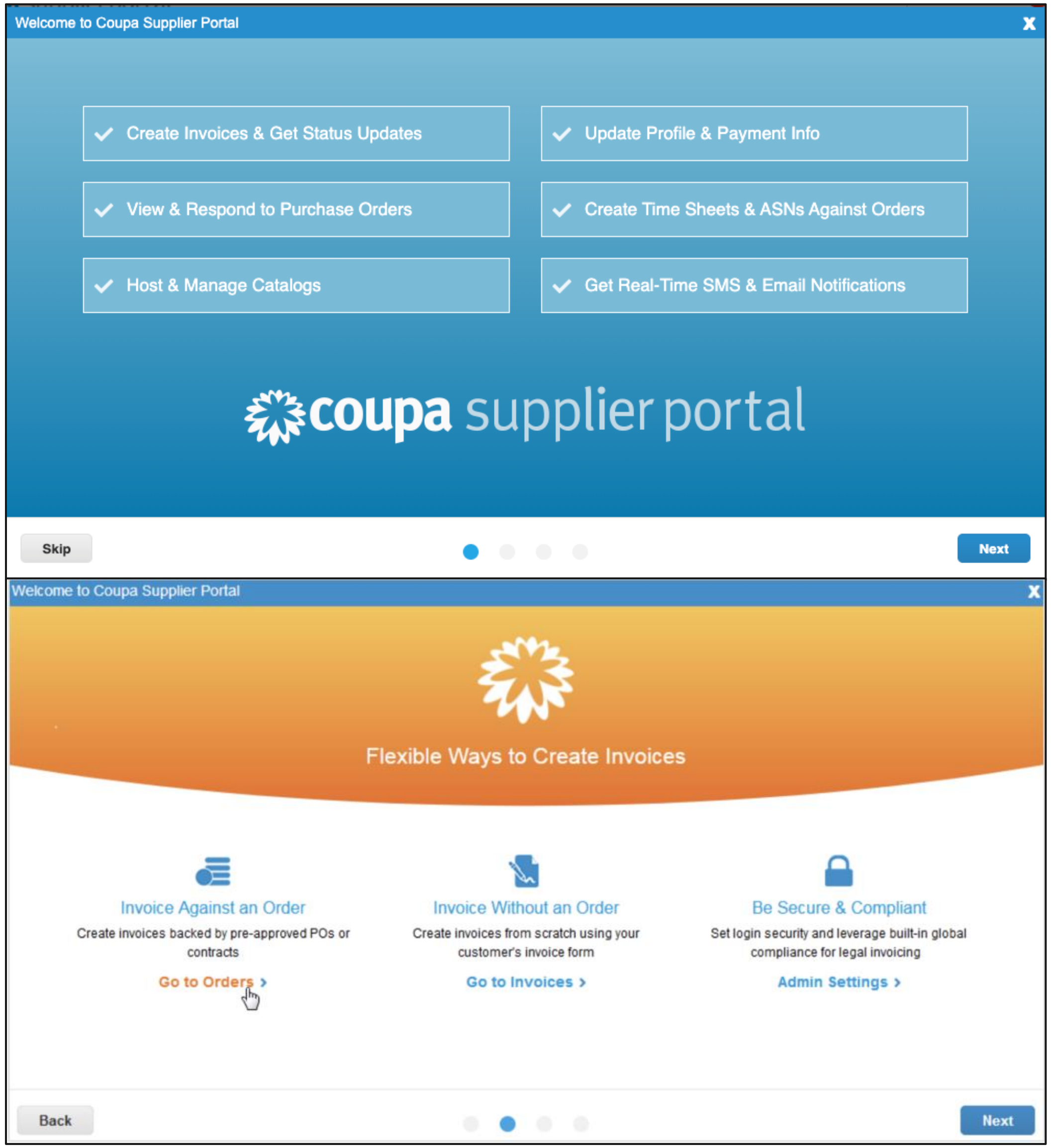
- If you have received the customer created invitation and have registered, you will go directly to the Log In to access the Coupa supplier Portal.
- In both cases, you receive an email invitation with different subject lines, depending on whether the invitation was sent by your customer or initiated by you. Save https://supplier.coupahost.com as a favorite link.





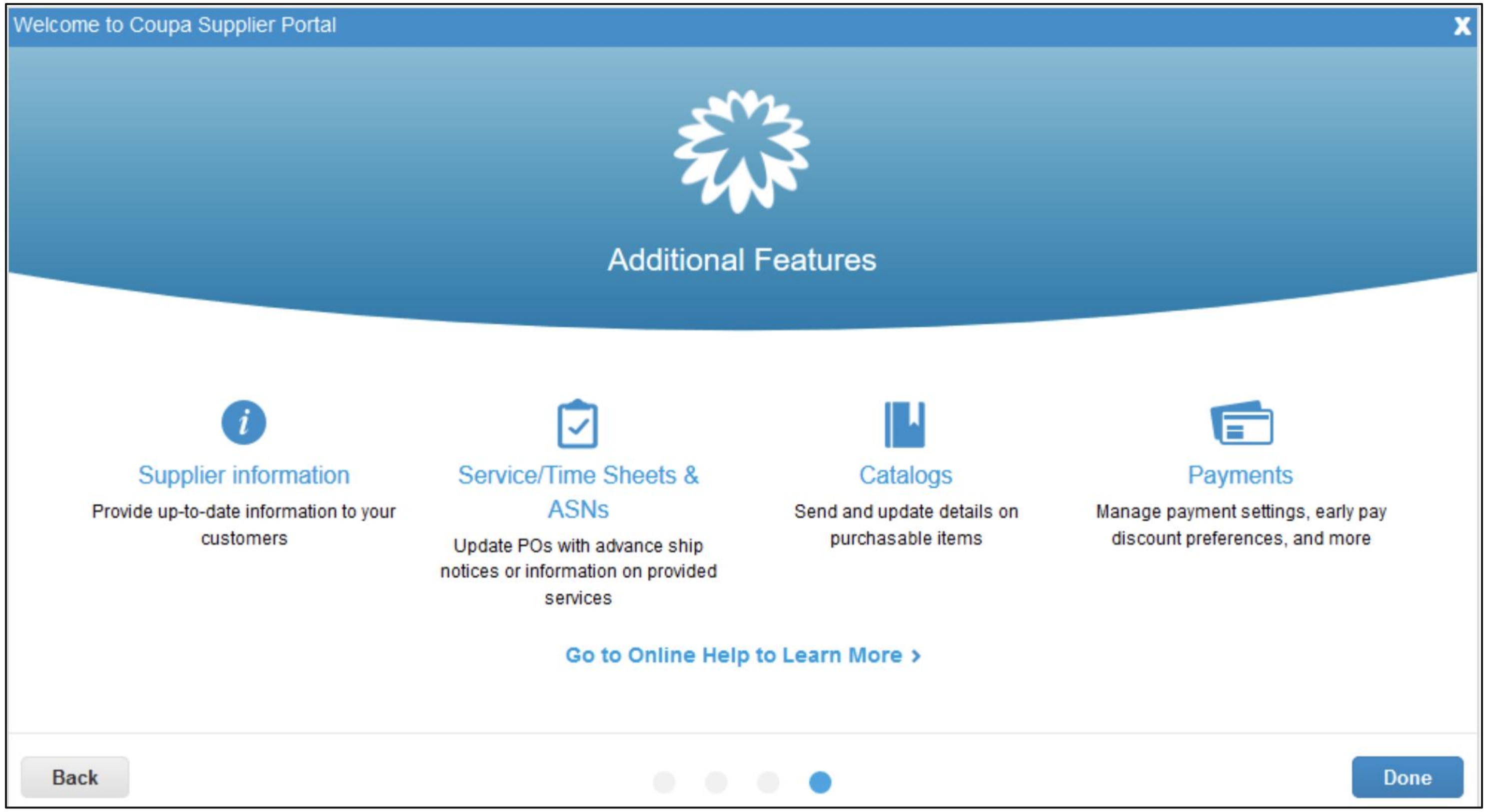
Welcome Tour

- Once you are signed in, Coupa takes you on a welcome tour.
- You can skip the tour by clicking on the Skip button or closing the window with the X in the top right corner.
- Clicking Next takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



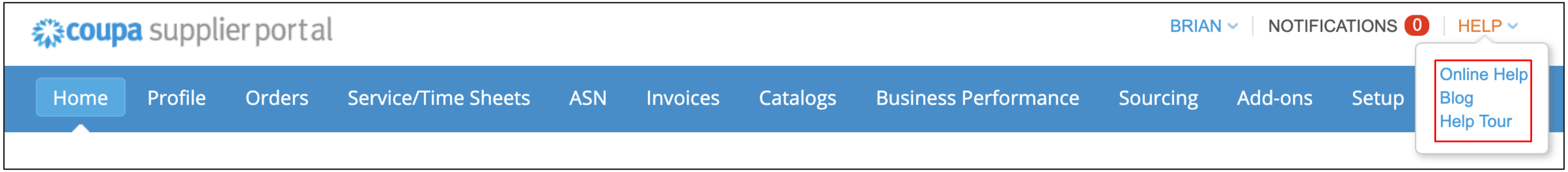
Welcome Tour Cont.

- The last page of the tour summarizes the additional features.

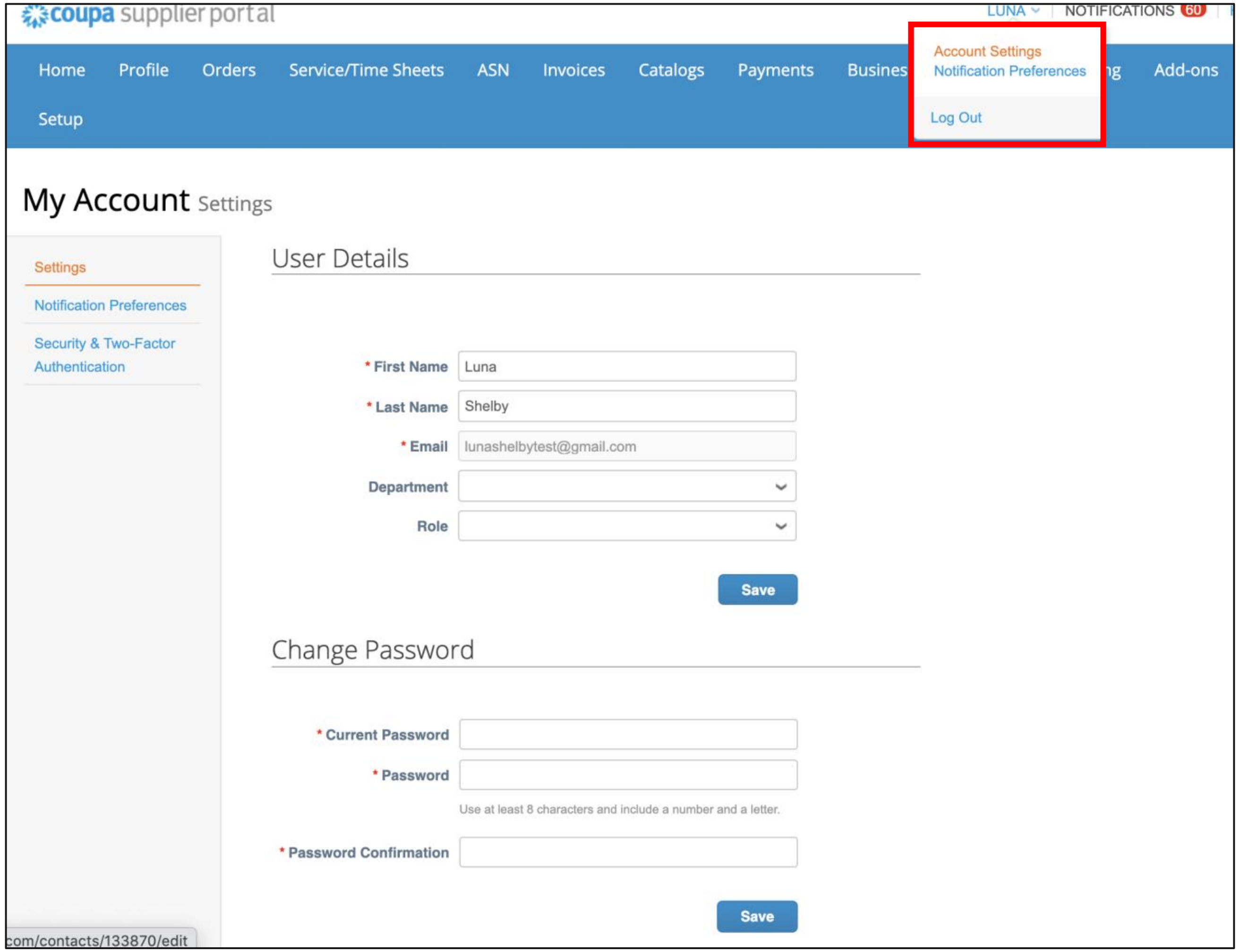


Getting help

- If you skipped the Welcome Tour, you could access any time by clicking on Help Tour.
- For additional help, if you click on the Online Help link, you will be directed to the Coupa Support. They will be able to assist you with any *technical* issues. For any process concerns, please follow up with your Odfjell contact.

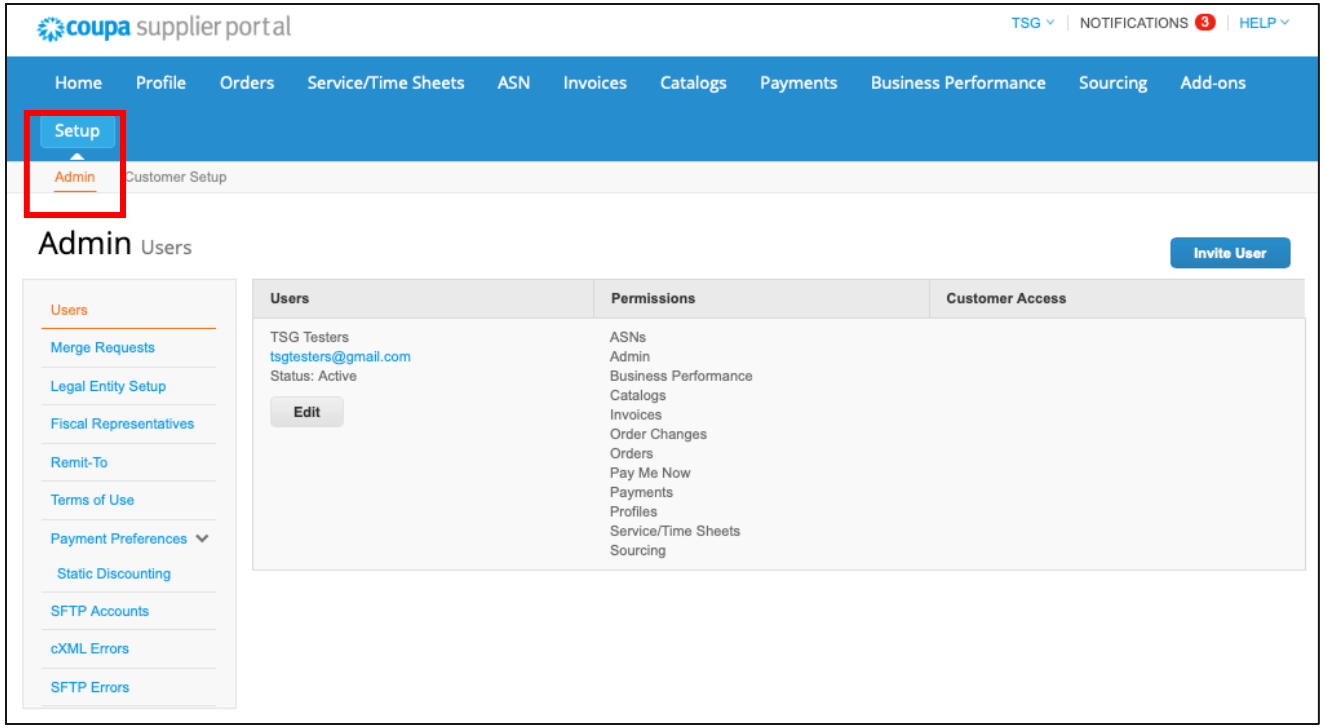


Manage Your Account



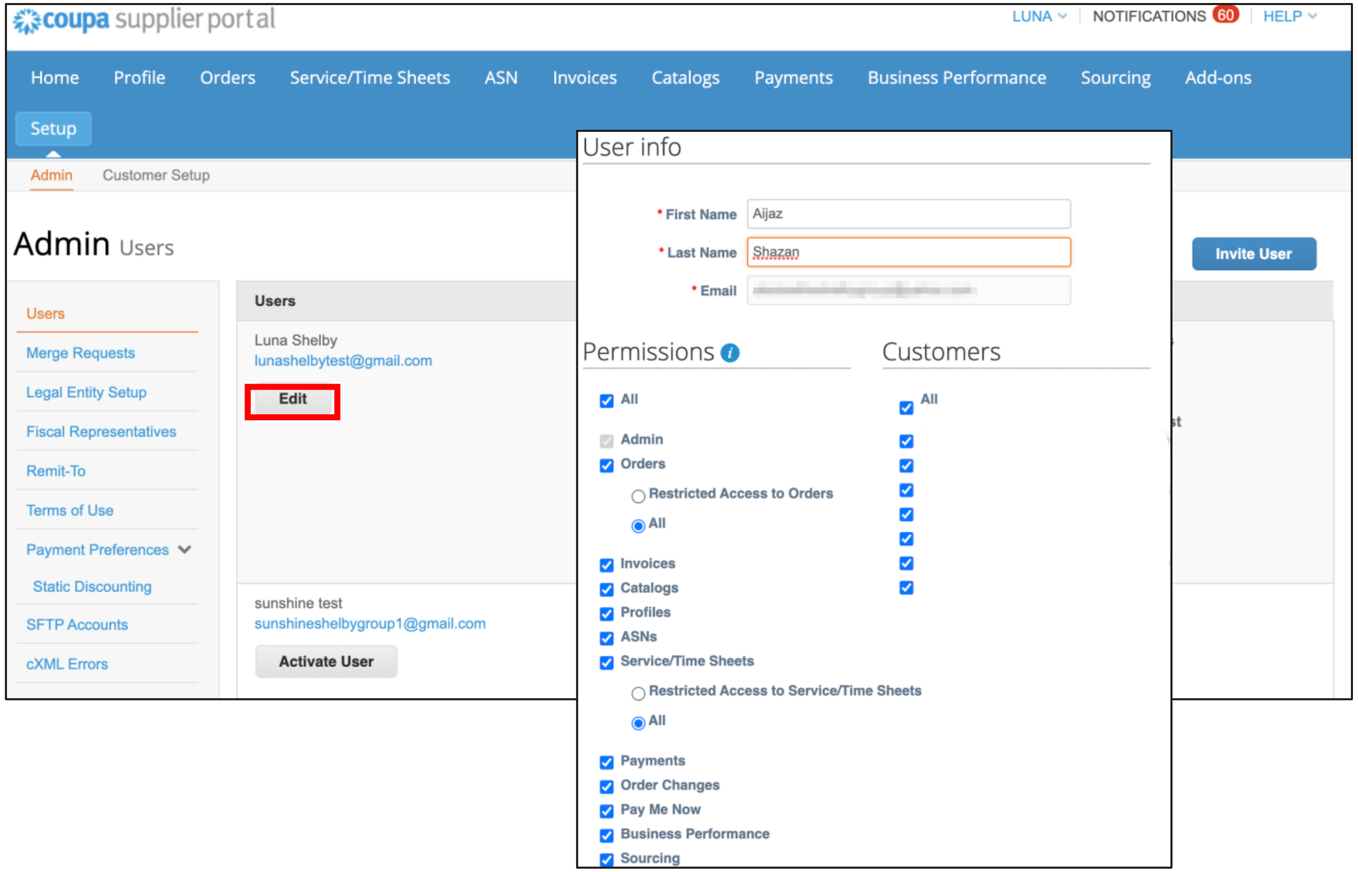
- On the My Account Settings page, you can make changes to your personal information (name, department, role, and password).
- Set or modify your notification preferences.
- Security & Two-Factor Authentication - enable/disable.

Admin



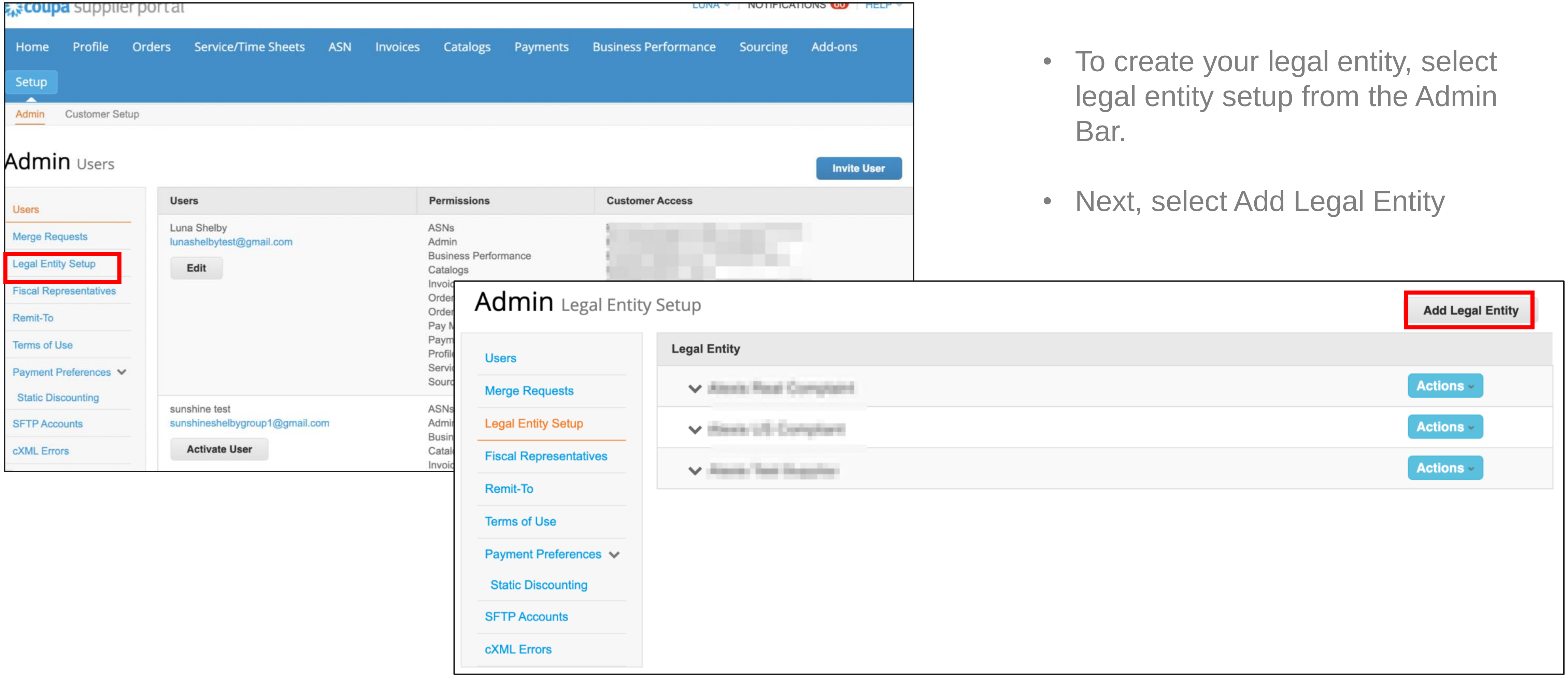
- Users - Manage permissions and customer access.
- Merge Requests - Manage accounts & merge requests.
- Legal Entities - Setup your account to create e-invoices by adding legal entities / remit-to addresses.
- Remit-to - Provide remit-to address and associated tax information to meet compliance regulations when invoicing.
- Terms of Use - View and sign the terms of use to work with the CSP.

Manage User Permissions



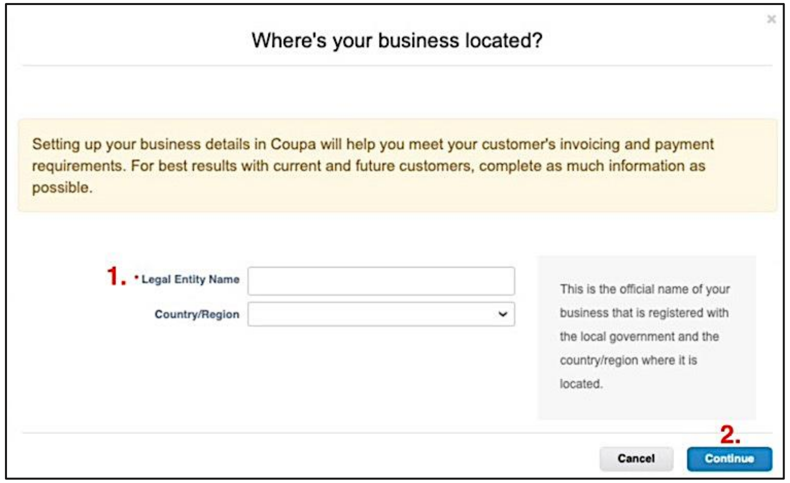
- To manage the permissions of a user, first press edit on the user you would like to edit permissions for
- Selecting permissions will also adjust the view on the home page
  Example: If user has permission to invoices and orders then that user will only see those specific tabs on their CSP home page
- Next, select the permissions you would like this user to have access to
- You also have the ability to select which customers your users have access to

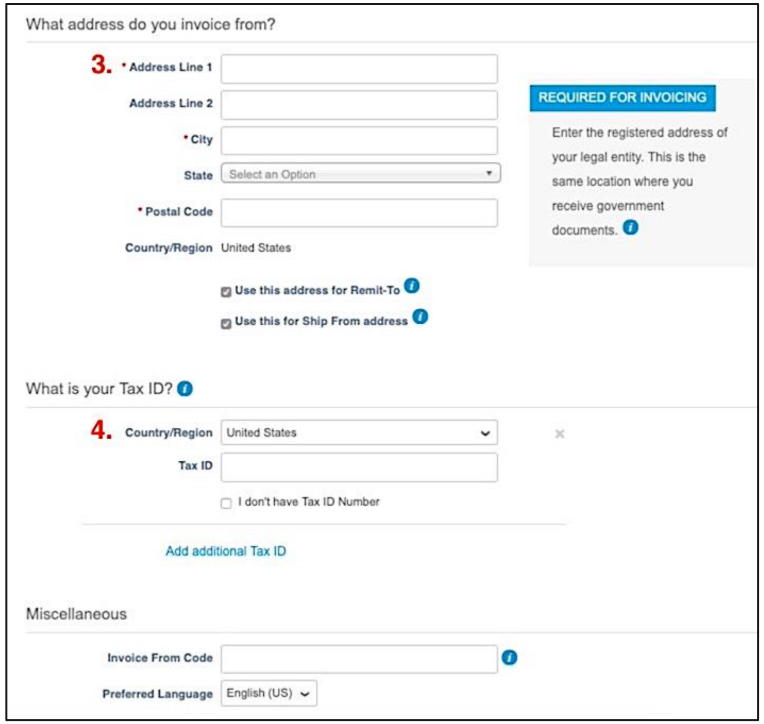
Legal Entity Setup



- To create your legal entity, select legal entity setup from the Admin Bar.
- Next, select Add Legal Entity

Legal Entity Setup (Cont.)





1. First, add the name of your Legal Entity and the Country/Region that you do business in. Then

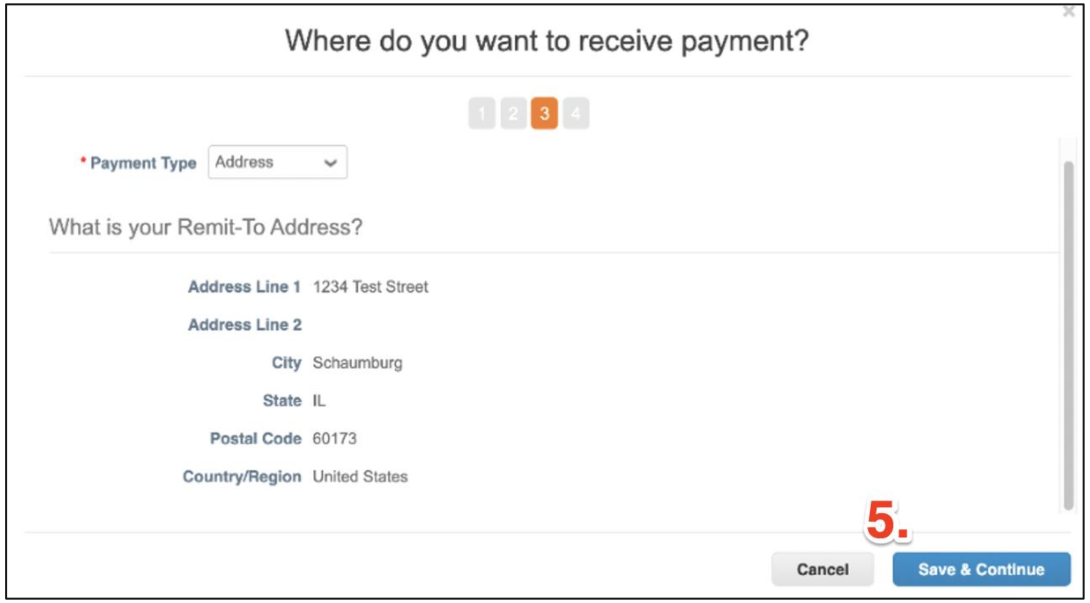
2. Click Continue. On the next screen you'll need to input some additional information.

3. Add your Invoice From address first.

   Do note that you will be able to use the same address as your Remit-To Address and your Ship From address by leaving those boxes checked

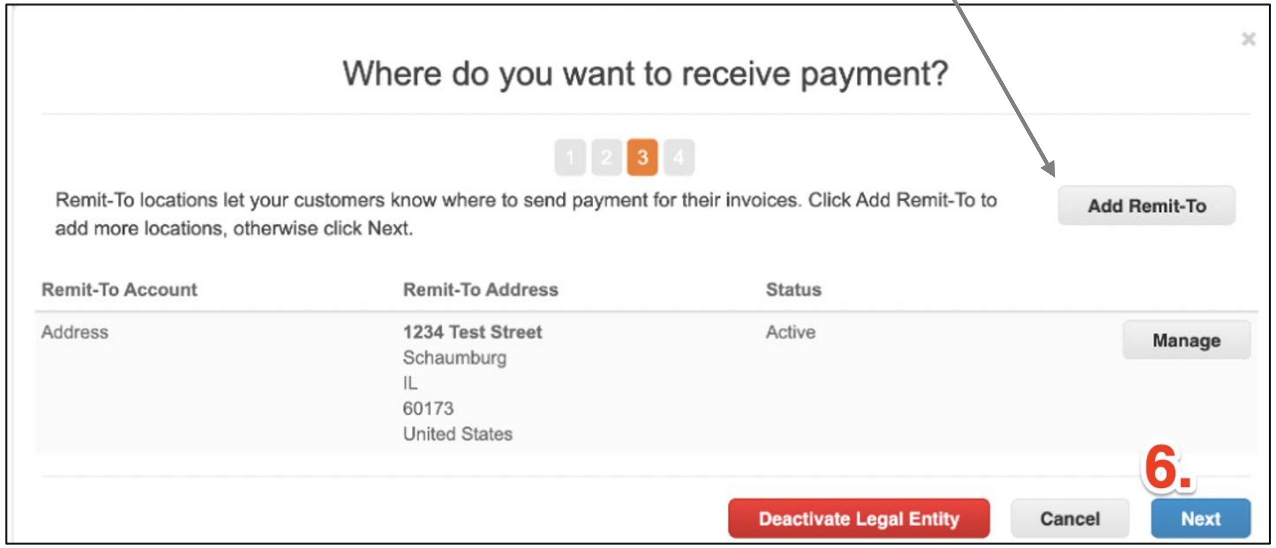
4. Next you can enter a Tax ID and an Invoice From code, but they are not required.

Legal Entity Setup (Cont.)



5. Next, confirm the address where you would like to receive payment. Click Save and Continue on the first screen to confirm the remit to you have already set up.

6. Next, you can again confirm the Remit-To you just set up. If you need to add an additional Remit-To, select the Add Remit-To button. If not, then click next.



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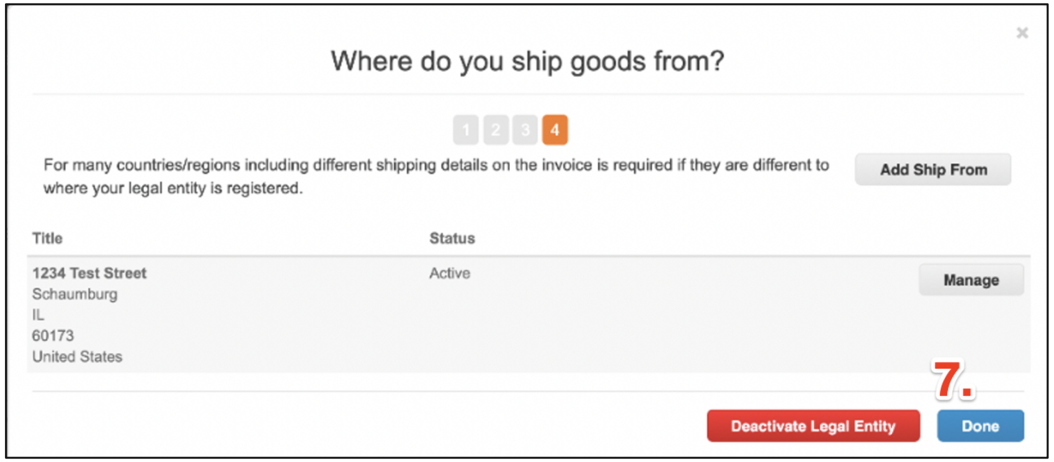
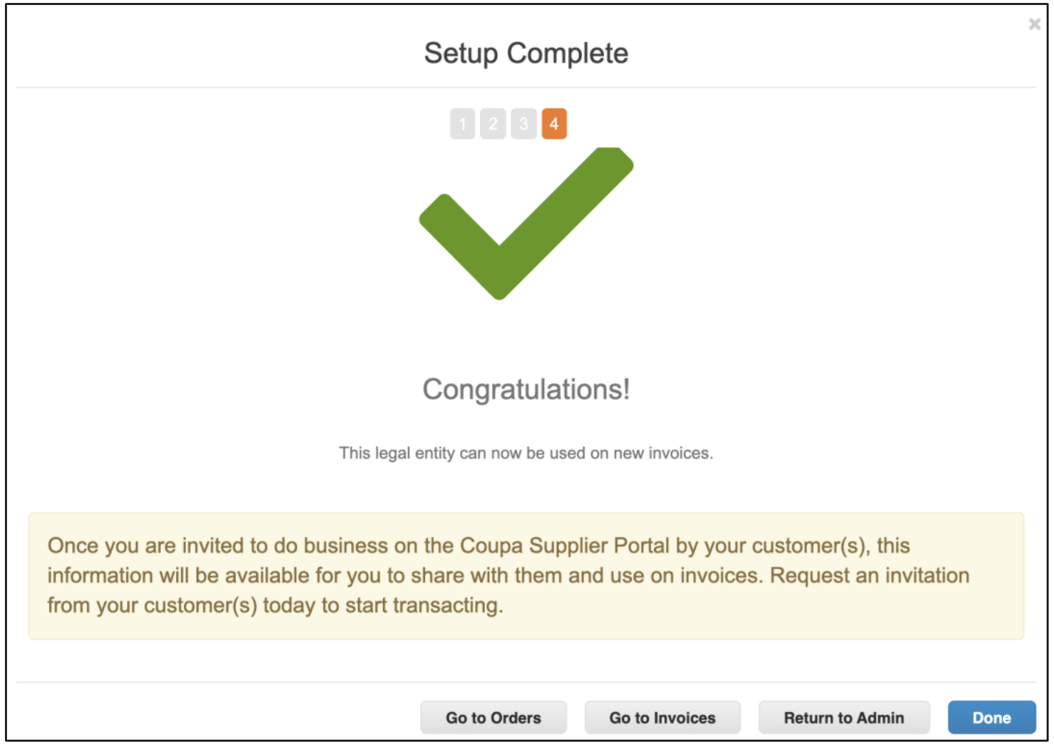
Legal Entity Setup (Cont.)

7. Next, validate your Ship From address. If you need to add additional Ship From addresses, select the Add Ship From button and add the addresses.

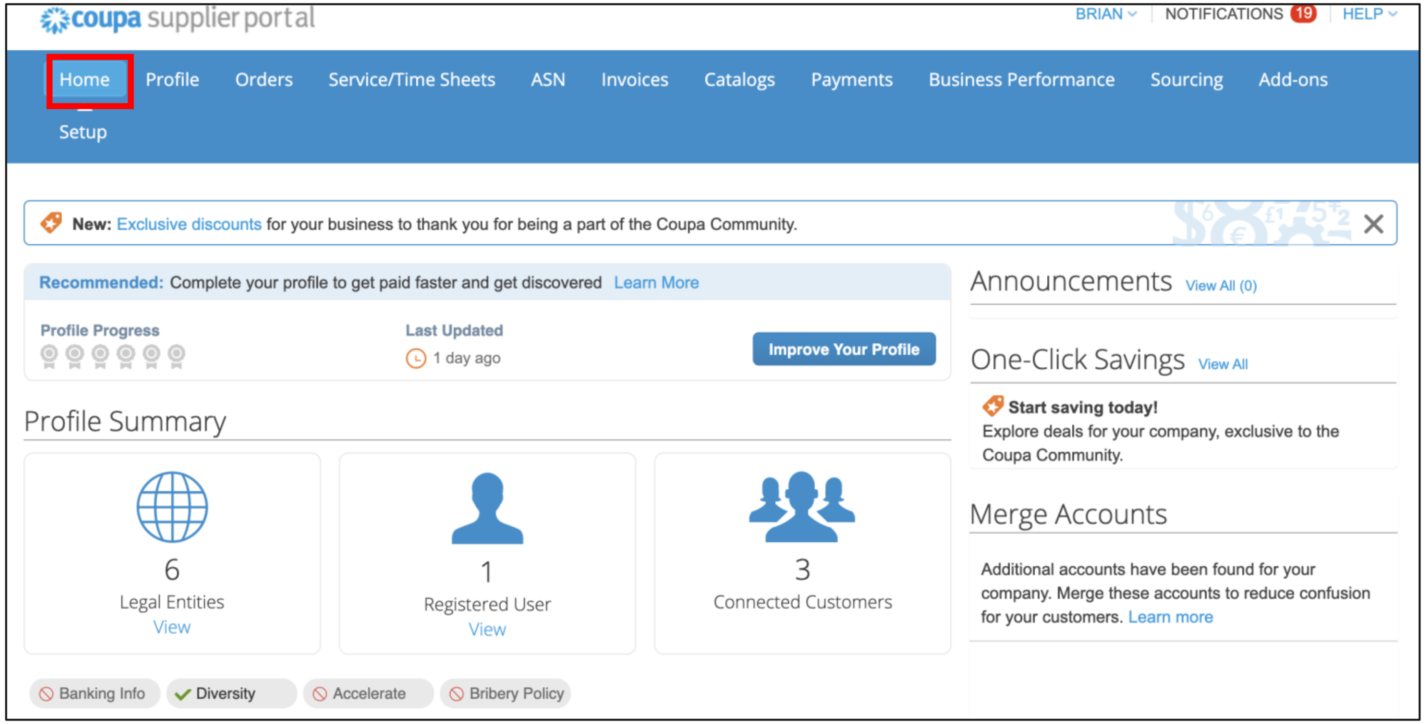
- When you are finished, press Done.

- You will then see the green check mark letting you know that you have successfully completed the setup of your Legal Entity.





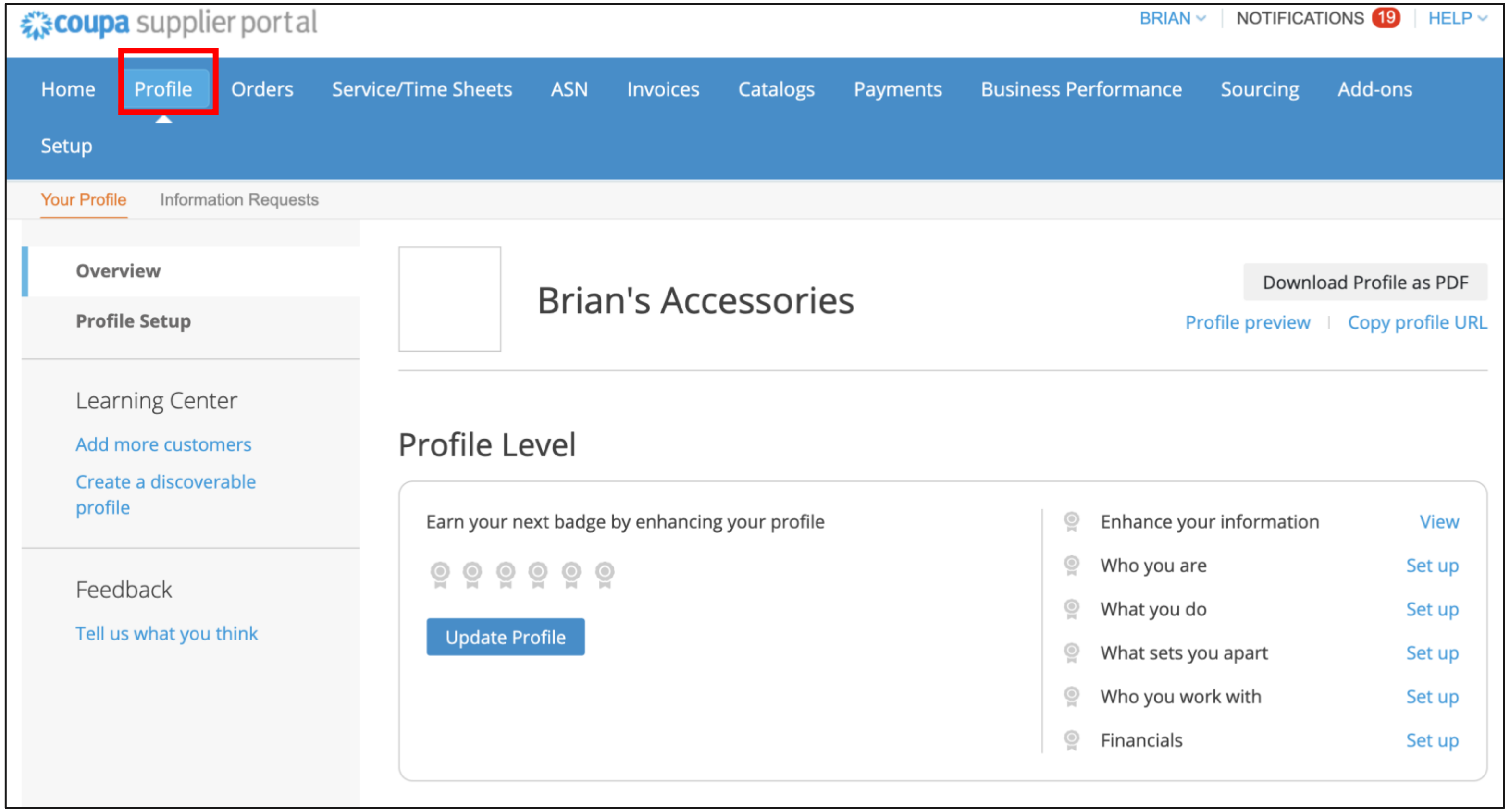
Home Screen



Navigation Bar

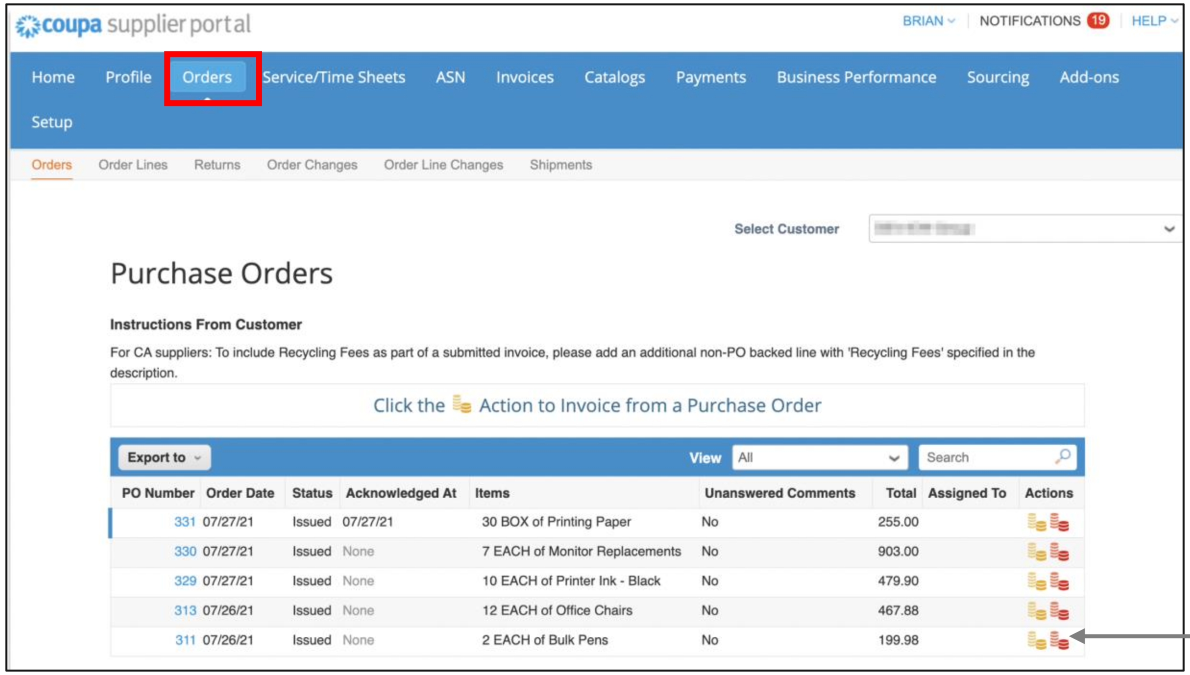
- Reviewing, acknowledging orders or submitting invoices is simple by accessing them through the navigation bar. You can also configure your profile/account and administer your connection through the CSP.
- Access to these tabs provides you with real-time status of orders and invoices with Odfjell.
- You can even communicate through the CSP to Odfjell through comments section of invoices and purchase orders.

Your Public Profile



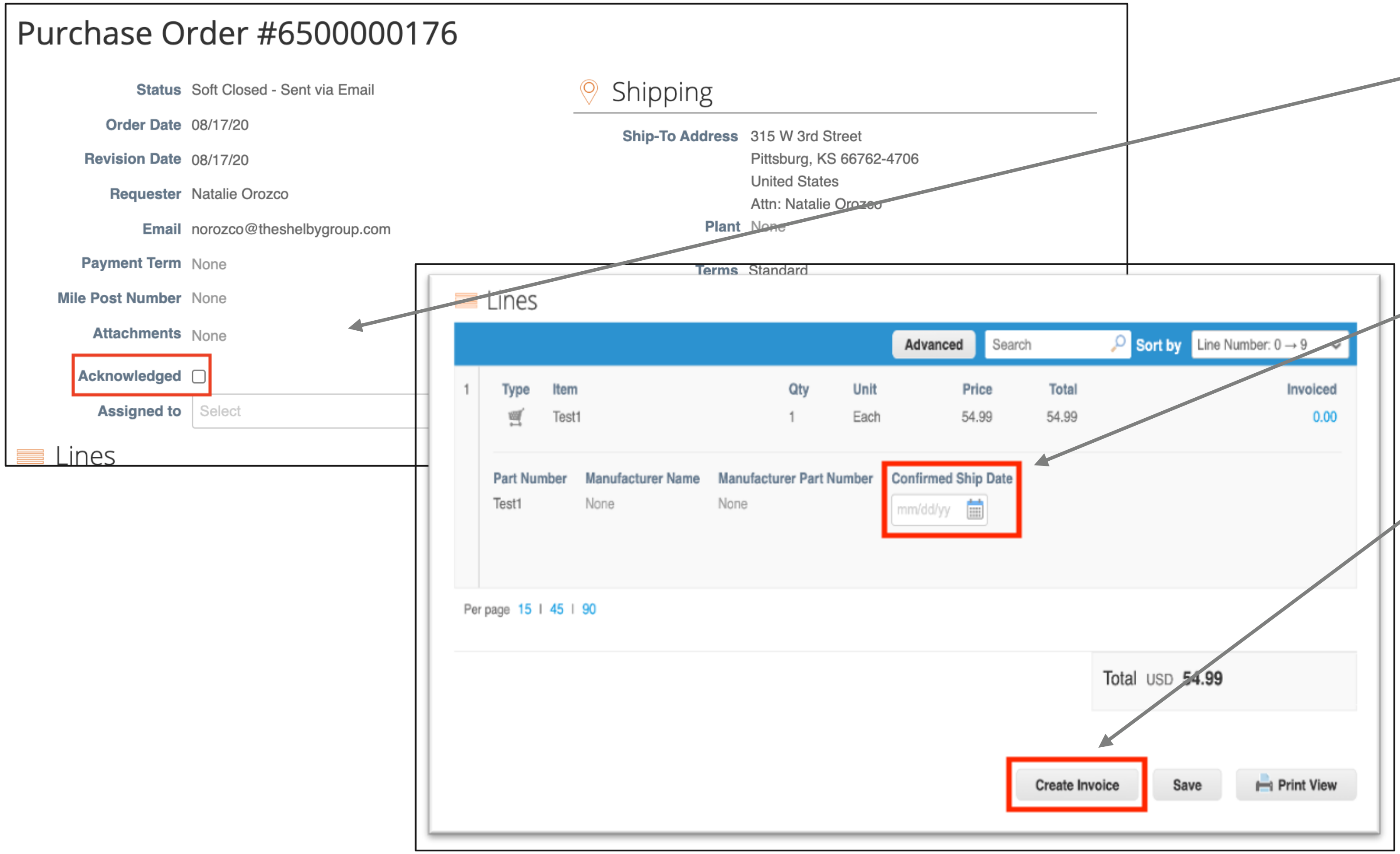
- There is a link on the homepage that will take you to your public profile and a button that you can use to update your profile.
- You can also update your profile using the profile menu button.

Purchase Orders



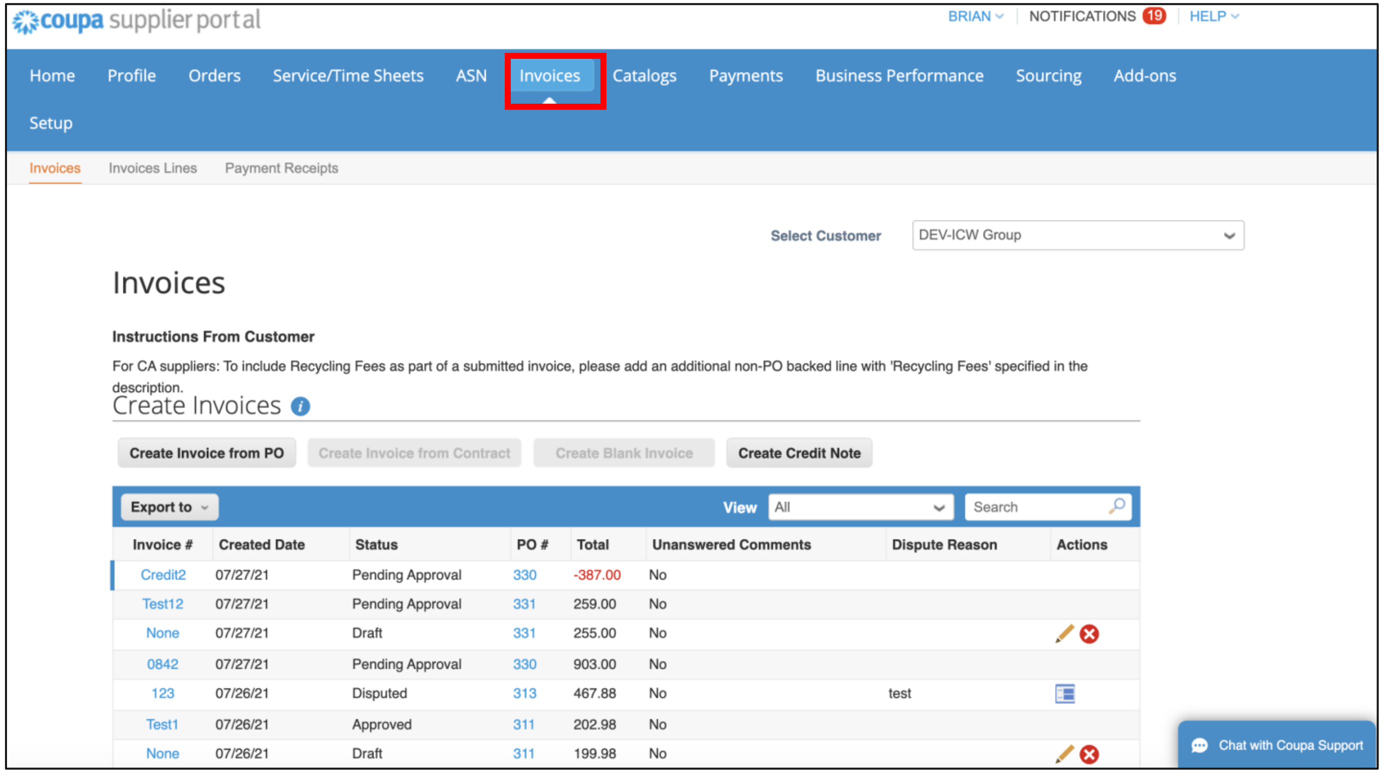
- By selecting the Orders tab in the main menu bar, the Purchase Orders page data table appears.
- From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.
- Under the PO Number column click on the number to open and view the PO.
- Click the Icons under the action's column for the following actions.
    - Gold coins flips the PO into an invoice.
    - Red coins create a credit note

Purchase Orders Continued



- Before creating your invoice please ensure to click on Acknowledged
- Adding your Confirmed Ship Date
- Invoices may also be created from an open purchase order by clicking the "Create Invoice"

Invoices

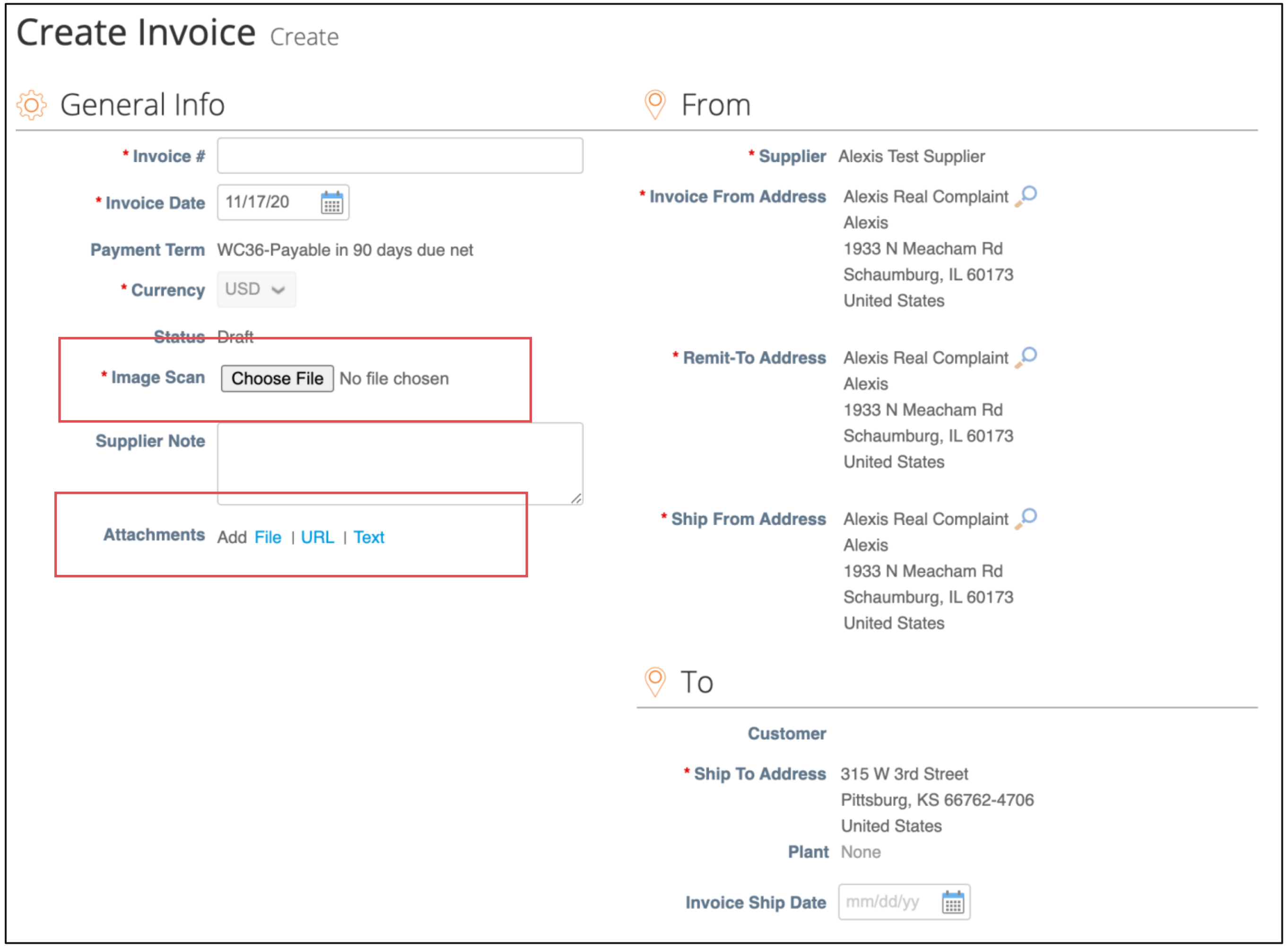


- Select the Invoices tab for the invoice page with data table to open.
- Create Invoices by selecting the following:
    - Create Invoice from PO
    - Create Invoice from Contract
    - Create Blank Invoice
    - Create Credit Note
- Select the View dropdown arrow to filter your search or enter the invoice # in the search bar.
- Open an invoice or the associated PO by clicking the Invoice # or PO # hyperlink.

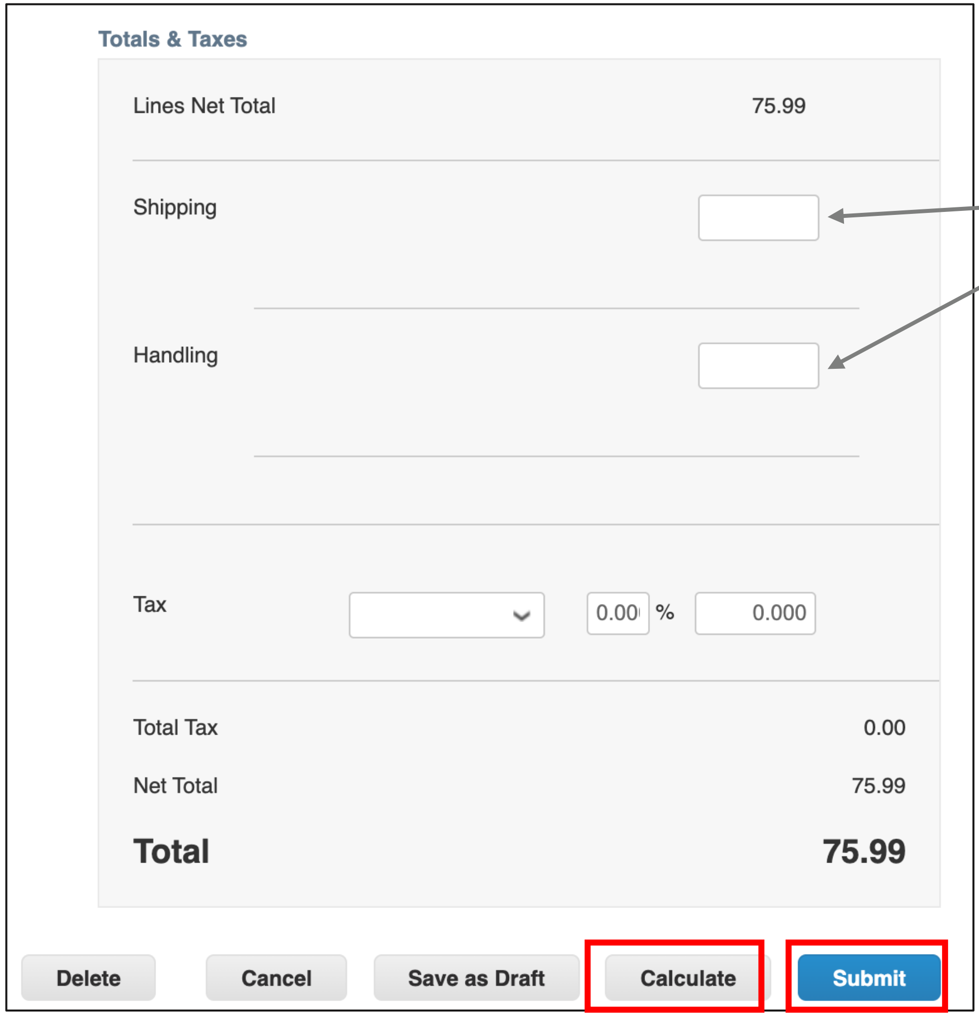
NOTE: Buttons are only active for actions you can do.

Invoices Cont.

- Fill in at least the mandatory fields (marked with a red asterisk).
- You can create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding Search (magnifying glass) icon in the From section. You are guided through creating your legal entity.
- You can attach a file to an invoice using Image Scan or Attachments. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or less. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.



Invoices Cont.



- Enter any Shipping, Handling and/or Tax if applicable then click calculate for your total
- Click submit to sent the invoice to your customer
- Note: Changing the quantity of pricing is possible but may trigger approval notifications to Odfjell and potentially delay payment processing

Disputed Invoices

- In the Coupa Supplier Portal (CSP), a disputed invoice is the invoice containing issues that must be resolved by the supplier and resubmitted to Odfjell for approval. Invoices with disputed status are invoices with information that Odfjell does not agree to, needs clarification on, or needs a revision or correction before it can be processed further.
- Please note that: *Odfjell* does not process disputed invoices for payment until you resolve the dispute.
- Some of the common reasons, for which an invoice can be disputed are:

Coupa Disputed Invoice Reasons	
Attachment missing or in incorrect format	Incorrect Amount or Currency
Duplicate invoice. Already paid or payment review in progress	Payment terms incorrect
Mismatch in PO & Invoice Quantity	If the Tax is added & is incorrect
One or more invoice lines unit of measure (UOM) differs from the corresponding purchase order (PO) line's UOM	This invoice does not contain a valid ODFJELL Requestor. Please reach out to your ODFJELL contact for the proper Requestor
The supporting documentation doesn't cover all the required details	Invalid or missing PO number

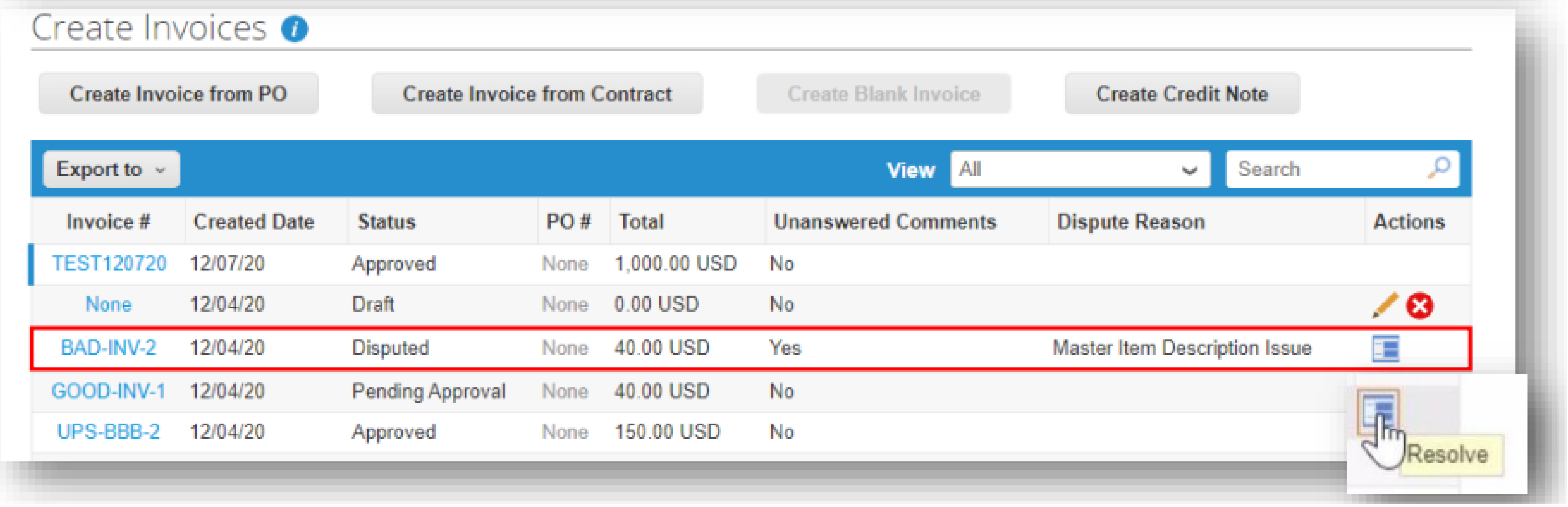
Useful Link: Coupa Success – View and Manage an Invoice

Disputed Invoices

When the status of an invoice changes to "Disputed", you receive an email notification with:

- Invoice number
- Date of the dispute
- Reason for the dispute
- Optionally Odfjell can leave any additional comments on the bottom on the invoice page.

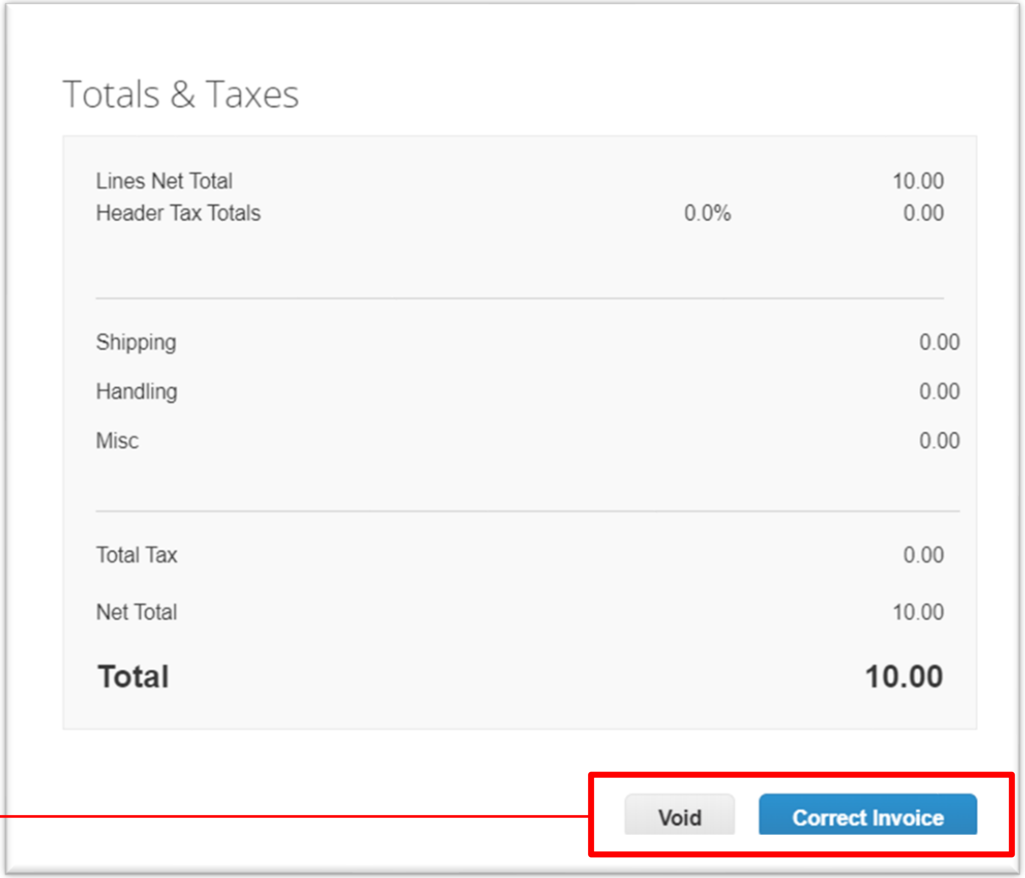
In the Invoices table, click on the invoice number or on the Resolve button in the Actions column for the disputed invoice that you want to resolve.



Disputed Invoices – Resolution Process

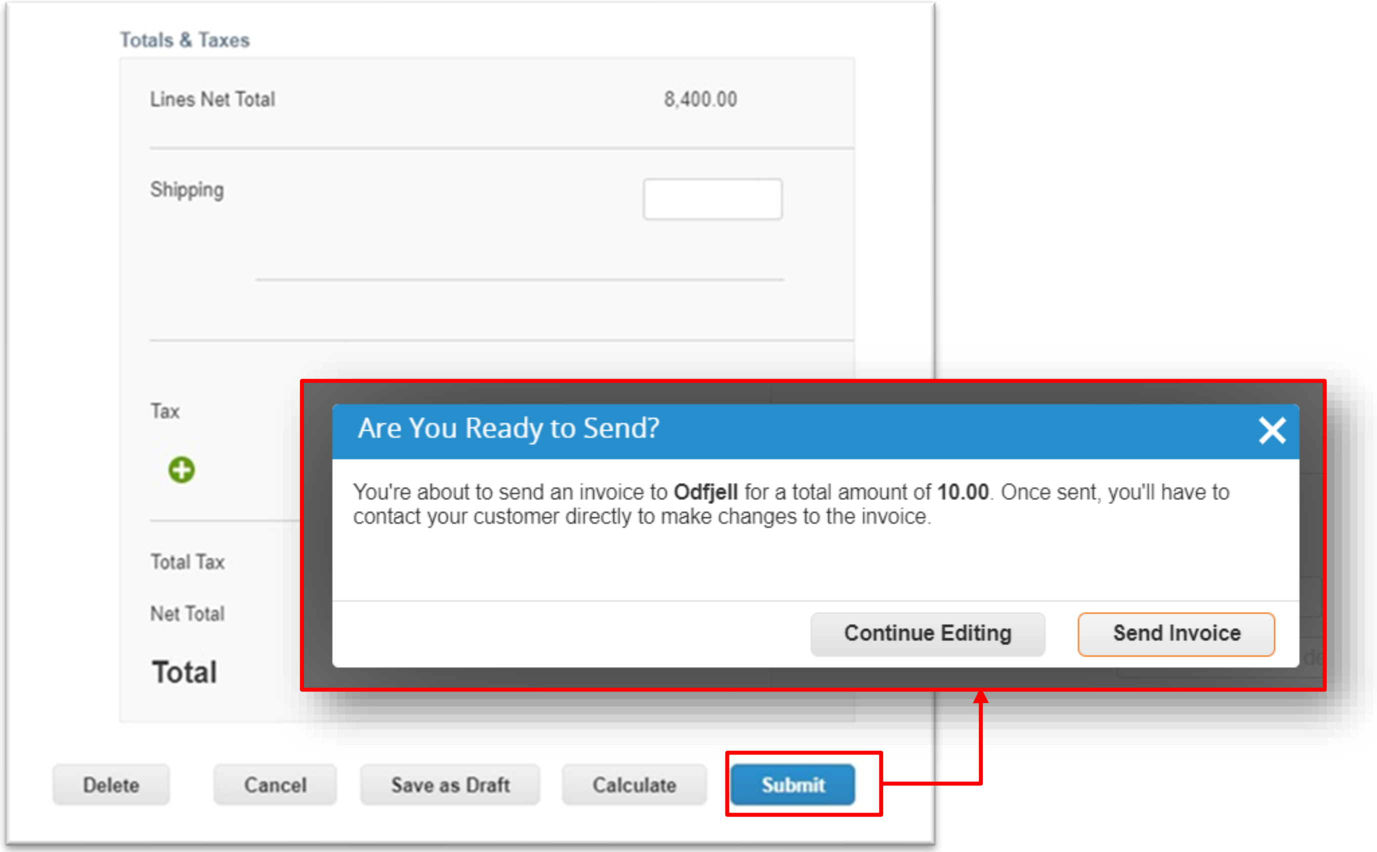
To resolve a dispute, click on the relevant button at the bottom of the invoice.

- **Void**: Disputed invoices will also give suppliers the option to Cancel or Adjust the invoice. If an invoice was issued in duplicate or has already been paid for through an earlier invoice, select ***Void***.
- **Correct Invoice:** If an invoice has some incorrect information, correct it. This option allows you to completely edit, add attachments and make any adjustments to address the supplier's concern.
- Should you choose to **Correct Invoice**, please follow the process in the next slides.



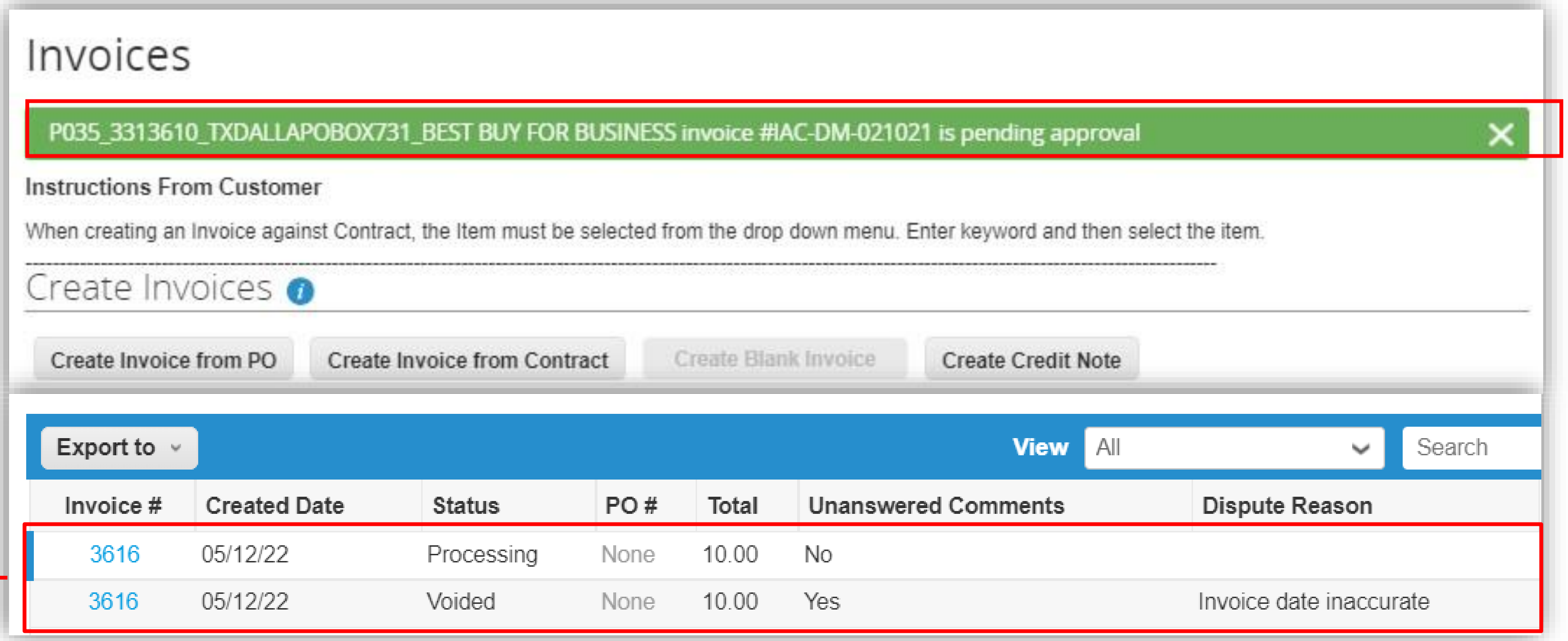
Disputed Invoices – Correcting a Disputed Invoice

- Suppliers can also make necessary changes to the Total & Taxes section such as adding shipping charges and applying approved taxes.
- Click Calculate below the Total & Taxes section to lock in the changes and to update the invoice total, then click Submit.
- A message box will appear, click Send Invoice to continue.



Disputed Invoice (Resolved) - **Invoice Status**

- The green bar of success should appear at the top of the Invoices screen.
- Suppliers will see that the original disputed invoice will have a Voided status and the corrected invoice will have the same invoice number with a Processing status.

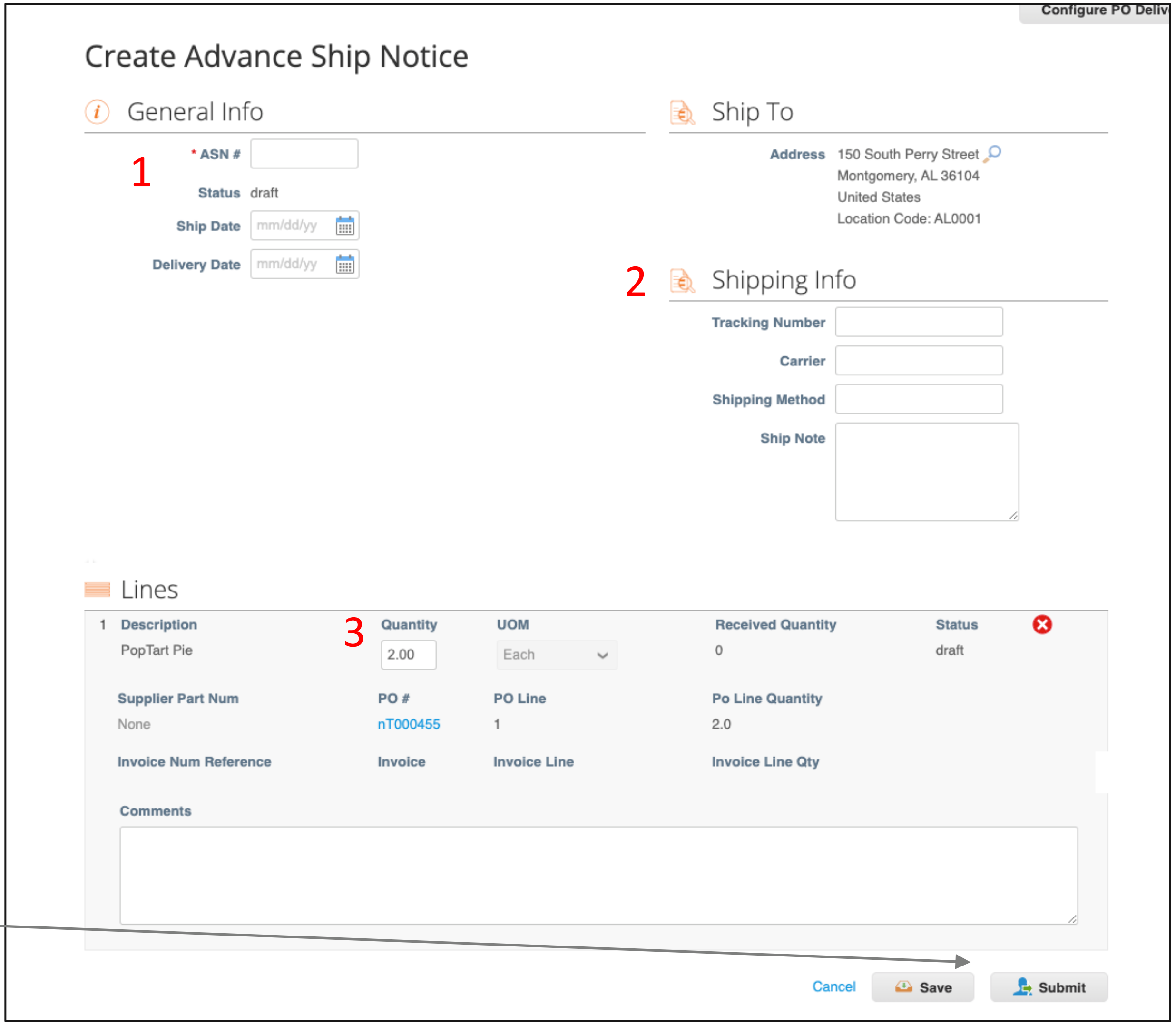


After you submit your Coupa invoices, invoices will be routed to the AP Team for review and approval. During this time, all invoices are visible just for Odfjell's AP team. If the Invoice Dispute has been correctly resolved, it will follow our regular process for approval and payment.

ASNs

- Advanced Ship Notifications (ASN) are for alerting Odfjell that the order has been shipped

- From the Orders tab in the CSP, there is a new icon to **Flip to ASN**
- When you do, the entry screen will open and you can then (1) assign the ASN#, (2) fill in shipping info, and (3) adjust quantity if needed.
- When done, click Submit



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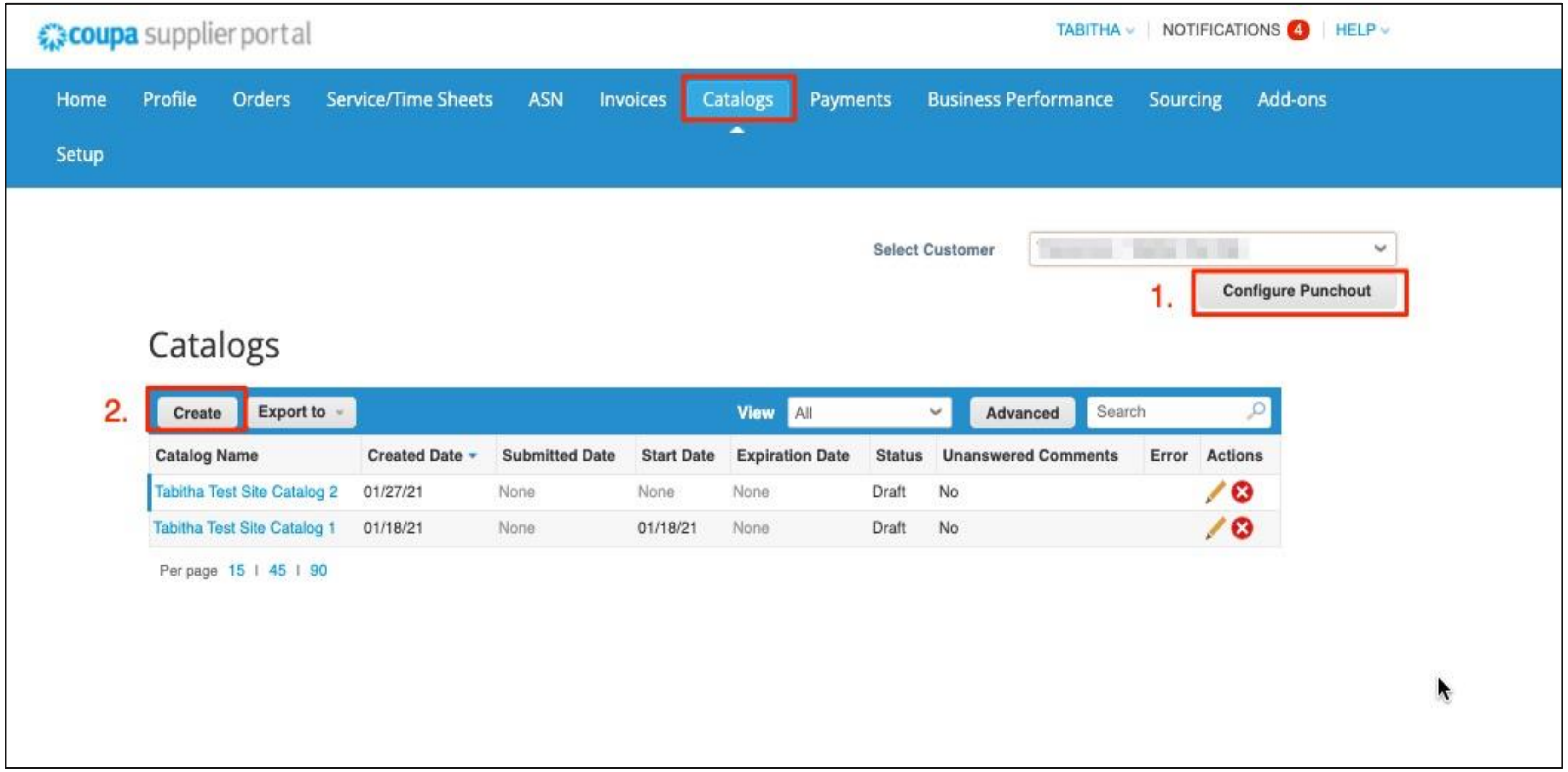
Catalogs

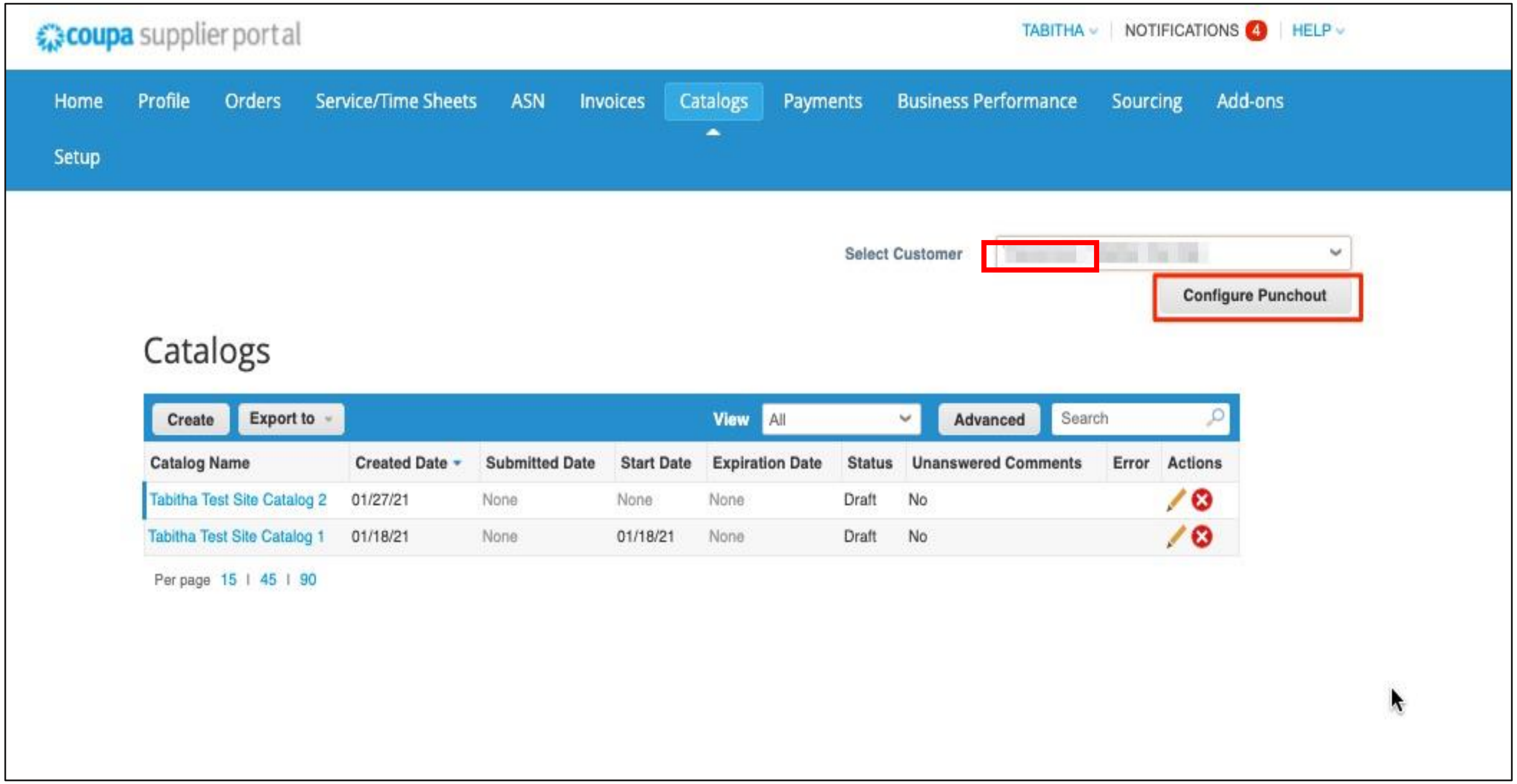
There are two types of catalogs you can set up under the Catalog tab.

1. Punchout Catalogs
2. Hosted Catalogs



Catalog - Punchout

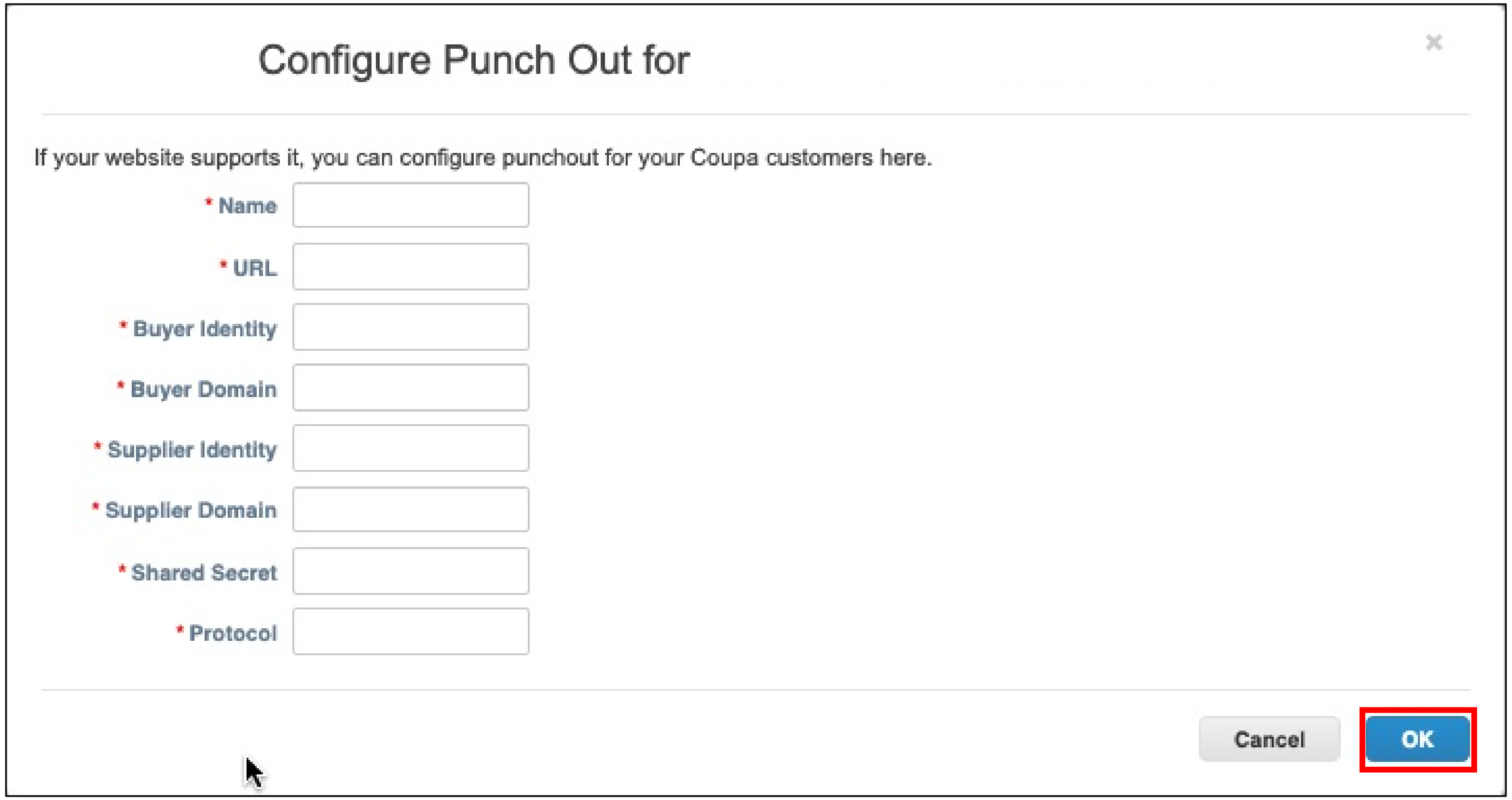
- Make sure to select the correct client first.
- Click on Configure Punchout from the Catalog tab.



Catalog – Punchout (cont.)

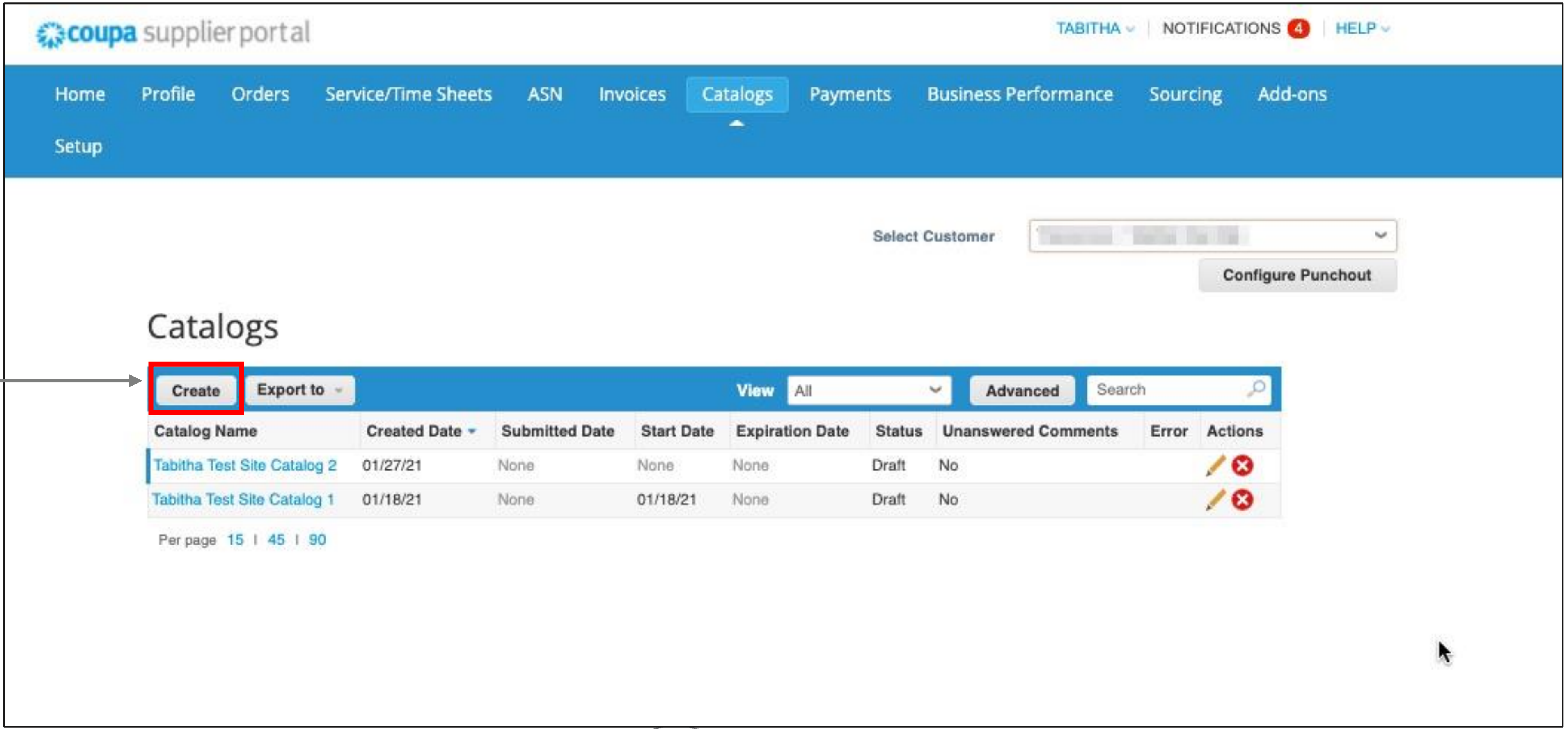
Enter in your punchout credentials and fill all the fields in. Once complete, click on the OK button.

If the catalog was uploaded correctly. You will then be taken back to the catalog screen and a green ribbon will pop up stating you have successfully loaded your catalog.

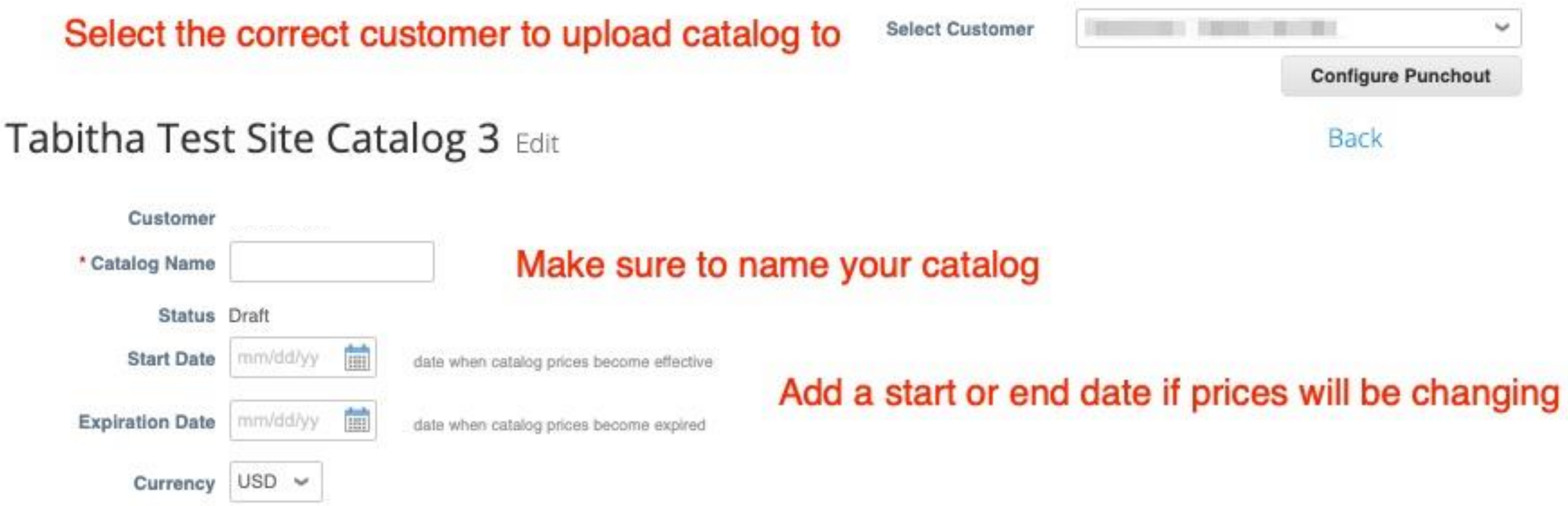


Catalogs – Hosted Catalog

For a Hosted catalog click on the create button on the catalog screen



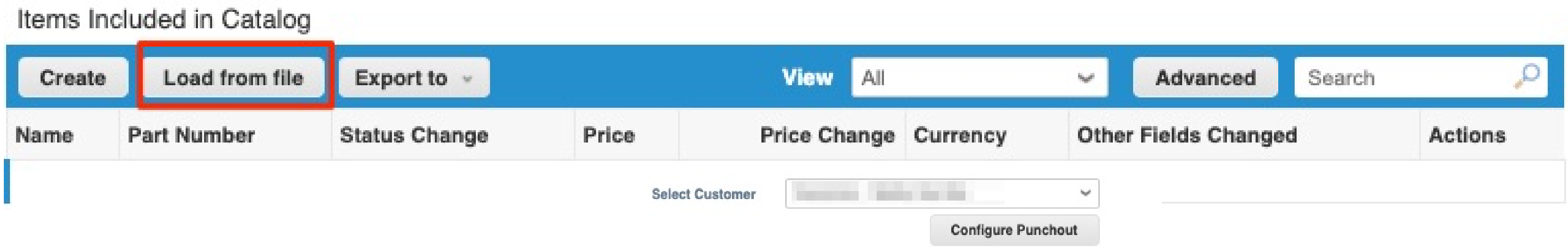
Catalog – Hosted Catalog (cont.)

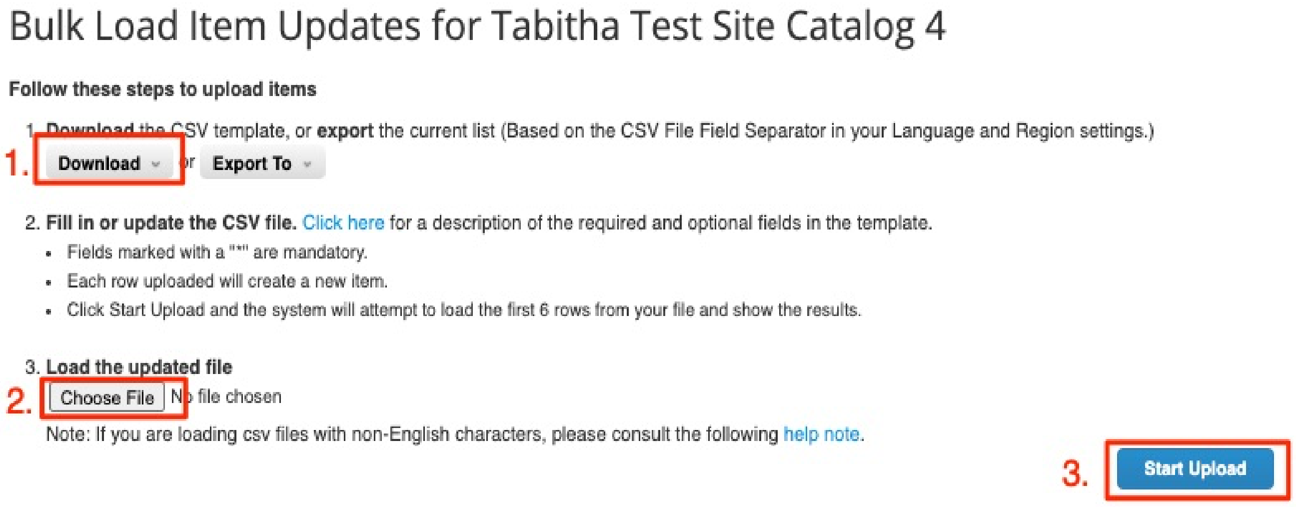


- After you have completed the above, you will scroll down on the page to the next section

Catalog – Hosted Catalog (cont.)

- Click on Load from File to be able to get the CSV template as well as to be able to upload the catalog.





1. Click on Download to obtain the CSV file
2. Once the file has been updated, this is where you will load the file at.
3. Last step – after the file is loaded click on Start Upload

QUESTIONS?

Please Email
otussupplierenablement@odfjell.com