COUPA SUPPLIER GUIDE

About this Guide

Enterprise Mobility utilizes Coupa, a Procure-to-Pay (P2P) system, to purchase goods and services from suppliers and manage supplier payments. All Enterprise Mobility suppliers are being directed to setup a Coupa account, which provides many benefits.

Coupa benefits for Suppliers

Speed - purchase orders are emailed automatically through Coupa with electronic invoices processed faster.

Accuracy - Coupa validates invoices to ensure all required information is present.

Visibility & Predictability - greater visibility across PO-to-Payment process; real-time invoice status means no more accounts payable inquiries, and potential to improve cash flow management
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Consistency - standard purchase order template guaranteeing the supplier always receives approved PO with consistent format.

**Free** - there is no cost to suppliers to use the Coupa Supplier Portal, and no software to install

This guide will provide detail on how to setup your account to work with Enterprise Mobility, including how to handle Purchase Orders (POs) and Invoices. Note: this guide may include old screenshots that refer to Enterprise Holdings. Topics included in this guide are as follows:

- **Introduction to the Coupa Supplier Portal**
    - o **Registering for the Coupa Supplier Portal and Inviting New Users**
    - o **Completing the Onboarding Process and Information Updates**
- **Introduction to Purchase Orders (POs) and Invoices in Coupa**
    - o **Receiving a PO via the Coupa Supplier Portal (CSP)**
    - o **Creating an Invoice via the CSP**
    - o **Receiving a PO via Supplier Action Notifications (SAN)**
    - o **Creating an Invoice via SAN**
    - o **Receiving a PO via cXML**
- **Supplier Quick Reference Guide**

- ➢ For additional detail about Coupa, you can visit the **Coupa FAQ** site hosted by Coupa.
- ➢ You may also contact Enterprise Mobility's **EM Buyer Desk** for assistance.

INTRODUCTION TO THE COUPA SUPPLIER PORTAL (CSP)

❑ The CSP is a no cost tool that allows suppliers to easily do business with Enterprise Mobility. It is the most comprehensive way for suppliers to manage their interactions with Enterprise Mobility.

❑ Within the portal, suppliers can manage content and settings, such as:

- View and acknowledge purchase orders.
- Create invoices and track status of payment.
- Host and manage catalogs.
- Update profile and payment information.
- Real-time exchange of transactional notes.

❑ For more information about the Coupa Supplier Portal please visit https://supplier.coupa.com/.
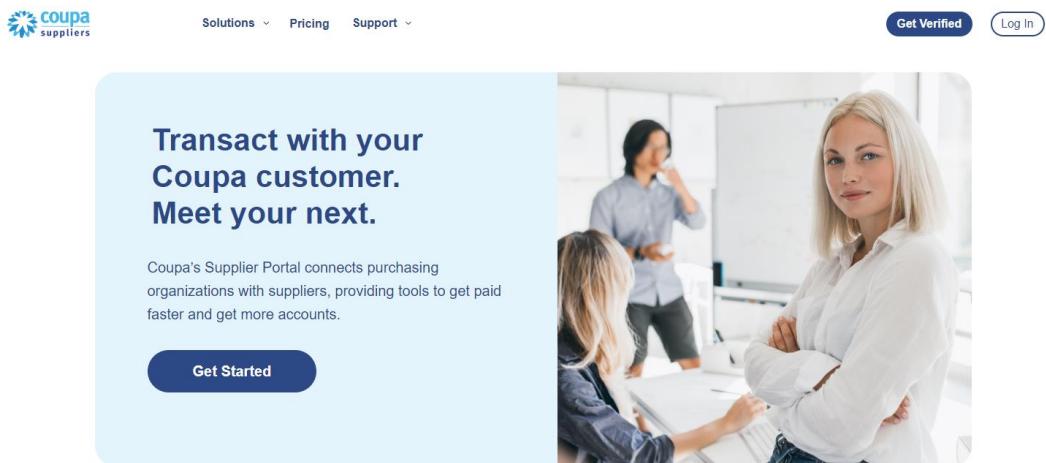
While Coupa does offer a paid subscription to suppliers, you do not need this in order to transact with Enterprise Mobility. See screenshot of subscriptions below with the free subscription circled in red.
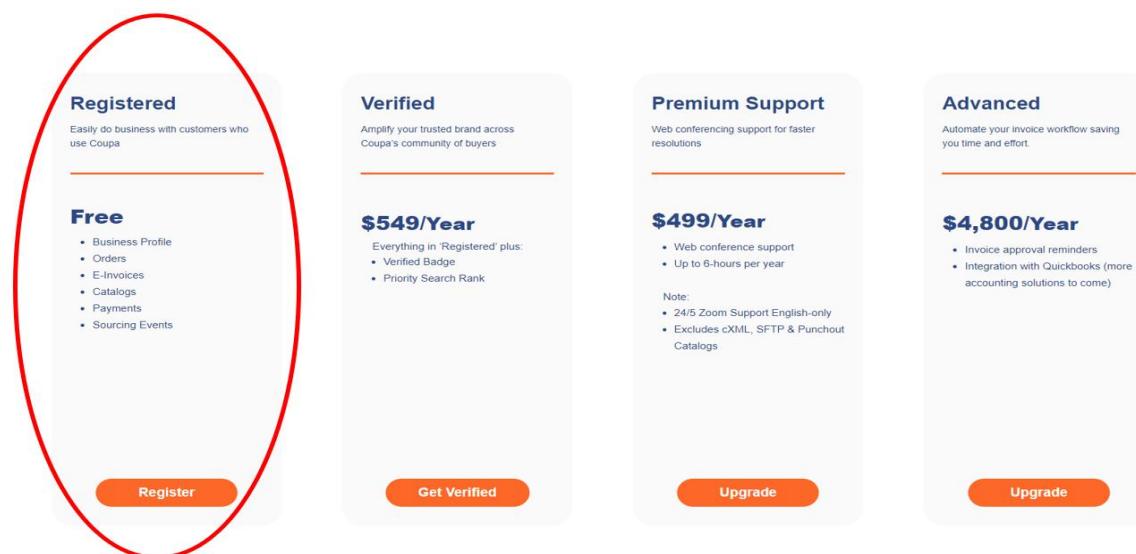
REGISTERING FOR THE COUPA SUPPLIER PORTAL

1. To join the Coupa Supplier Portal (CSP), Enterprise Mobility's suppliers need to perform the following steps:

   1. Register for the CSP.
   2. Create an account and public profile.
   3. Connect to Enterprise Mobility.

2. Suppliers can register for the CSP through one of the following methods.

Method	Benefits	Considerations
Enterprise Mobility-Created Invitation	■ The supplier receives an invitation with instructions from Enterprise Mobility. ■ When the supplier accepts the invitation and creates an account, they are automatically linked to Enterprise Mobility.	Primary Method
Self-Created Invitation	■ The supplier sets up an account proactively; including multiple users, login preferences, and a profile.	■ Supplier needs to connect manually to Enterprise Mobility in Coupa. Supplier must inform Enterprise Mobility that they have registered and want to connect. ■ Enterprise Mobility can connect with the supplier through the Supplier Portal Directory or by sending an invitation email to CSP supplier users on the account. When a supplier is invited using a different email address, that email can log in but must merge with the previous account, so the supplier's users are on the same account and linked to Enterprise Mobility.
Forwarded Invitation from a Coworker	■ Suppliers invite others within their organization to the CSP by forwarding the PO email notification or by sending an invitation from the Create Account page. ■ Suppliers ensure the correct users are working through the CSP.	■ Suppliers can forward the invitation only to email addresses with the same domain to maintain built-in security.

REGISTERING FOR THE COUPA SUPPLIER PORTAL, CONTINUED

Enterprise Mobility-Created Invitation

Suppliers should receive an invitation to the CSP from Enterprise Mobility. This is the method the majority of our suppliers will follow. The invitation is sent via email and includes instructions for creating an account. See email example below.

EM Profile Information Request – Action Required

Hello Supplier,

Enterprise Mobility is currently undergoing a procurement transformation to streamline our internal ordering processes and better connect with our trusted Suppliers. As an EM Supplier connected to the Coupa Supplier Portal, you will be able to manage the following information free of charge:

- Manage your company information

- View electronic purchase orders sent to your Company

- Create electronic invoices & view invoice status

By participating, Suppliers will have increased visibility, and the portal will help prevent lost documents and ensure timely payments.

You can also find more information here:

Coupa Supplier Site: Coupa Suppliers
Frequently Asked Questions: FAQ | Coupa Suppliers
Within the next 48 hours, please respond below to provide this information.

Note: *Not providing this information in a timely manner may impact your ability to do business with EM.*

Thank you,

EM Supply Chain Management

Join and Respond

Self-Created Invitation

Suppliers can go to supplier.coupahost.com and register by providing at least an email address. When the supplier clicks **Register**, an email with instructions and links to useful information is sent. The supplier can join the CSP or forward the invitation.
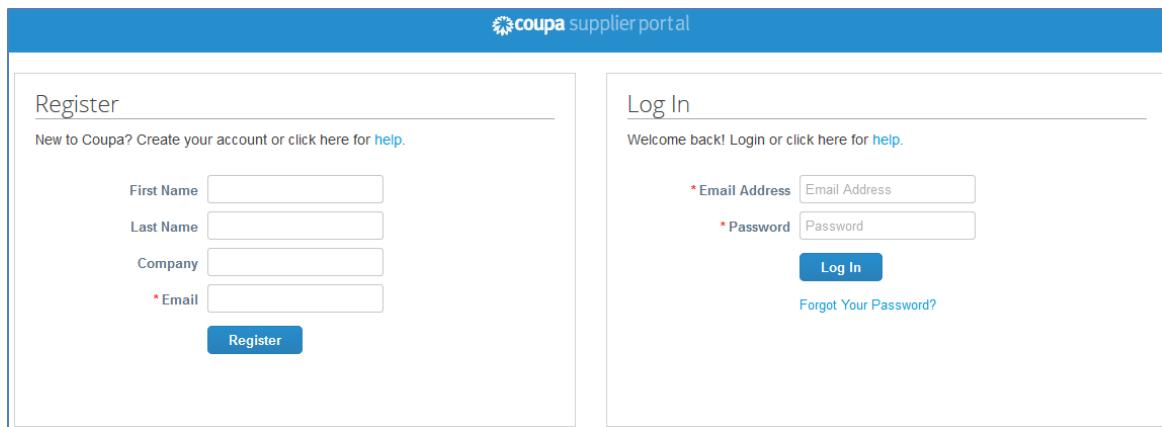
Once registered, suppliers must connect manually to Enterprise Mobility in Coupa by informing Enterprise Mobility that they have registered and want to connect. A representative from Enterprise Mobility must connect through the Supplier Portal Directory or by sending an invitation email to any of the CSP supplier users on the account.

Forwarded Invitation

❑ Suppliers can invite others to the CSP by:

- Forwarding the PO email notification with the **Create Account** button.
- Clicking **Forward This** in the CSP invitation email.
- Sending an invitation from the create account page.

Note: Suppliers can forward the invitation only to email addresses with the same domain.

o When the invited user clicks **Join Coupa** in the email, the user is directed to the Create an Account page.

o If the user is already linked to the CSP or tries to create an account from an expired invitation, the user is directed to the Register – Login page where a red message bar displays: "Your invitation has expired or already been activated."

Note: Invitations to the CSP expire after 30 days.

o Multiple supplier contacts may be set up under the same account.

Forwarded Invitation, Continued

o Suppliers can also invite new users within their organization to interact with Enterprise Mobility via the CSP within the **Setup > Admin** page by selecting **Invite User**.

o A screen will open where you provide the individual's full name and email address, along with selecting the permissions you want them to have. **Be sure to check "Enterprise Mobility" under Customers.**

o Click Send Invitation.

o The new user will receive an email to Join, and the user is directed to the Create an Account page.

COMPLETING THE ONBOARDING PROCESS

Supplier Response Form

Once the Supplier registers, creates an account, and connects to Enterprise Mobility on the Coupa Supplier Portal (CSP), a Supplier Response Form must be completed to be setup as an active supplier for Enterprise Mobility. The information collected includes contact information, banking details, remit-to addresses, and other key details of their supplier record.

1. Once the supplier is in Coupa, the Supplier Response Form opens. The supplier should verify Enterprise Mobility is listed as the Profile.
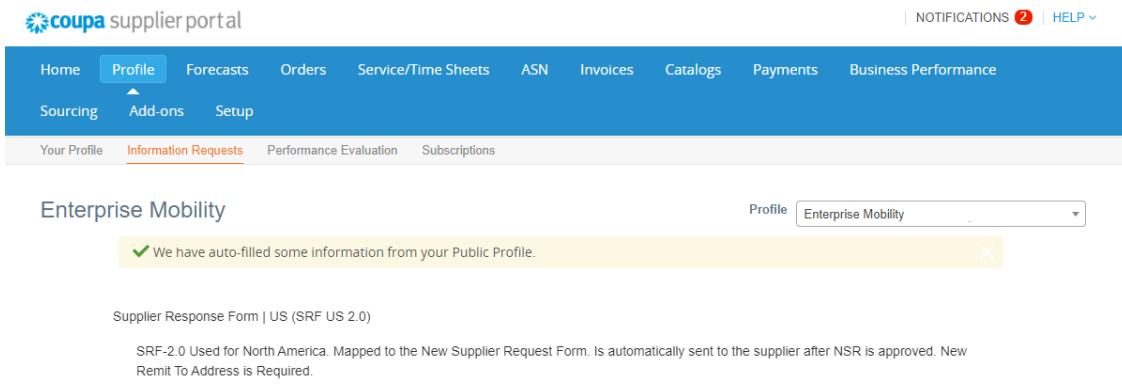
The supplier must complete the form providing key information needed for Enterprise Mobility's onboarding process including company details, tax classification, Tax ID, email (for PO recipient), payment type (ACH, Wire, etc.), and other key details.

1. To Add a remit-to address, the supplier should click **Add Remit-To** and follow the prompts to either provide a new remit-to address or select a remit-to from the existing addresses.

   Note: Suppliers can add multiple addresses in Coupa but only the most recently updated address is used. To make changes to a remit-to address, a new address must be added.
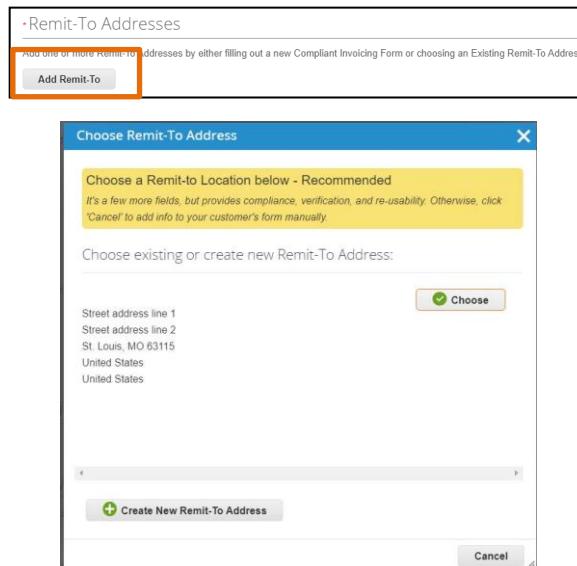
2. The supplier should complete the invoicing details, bank information, Remit-to details, and agree to the ACH Terms and Conditions (if applicable).

   Note: Suppliers can find more detail around the virtual credit card payment option here.

   The supplier must complete all required fields. They must also read and agree to the Enterprise Mobility Supplier Code of Conduct.
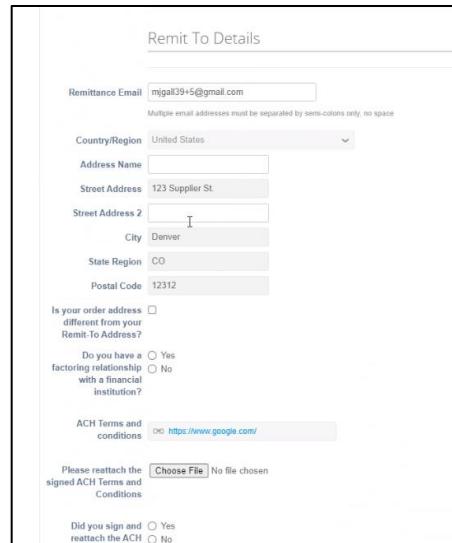

3. Once complete, the supplier should click **Submit for Approval.**

   • Once submitted, the request is automatically sent to Enterprise Mobility for review and approval.

   • The supplier is redirected to their Profile page on the Coupa Supplier Portal, where they can view the profile details submitted on the form.

   • The supplier will also receive an email notification that their information was recently updated and is pending approval.



You can view the status of the submission by going to **Information Requests**.

4. After EM approves the Supplier Response Form you will receive an email indicating you are onboarded and ready to transact with Enterprise.

   Note: Any open invoices prior to the onboarding date should be processed through the previous process. All invoices submitted through Coupa <u>must</u> have a PO #.
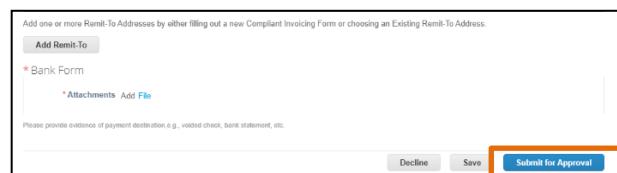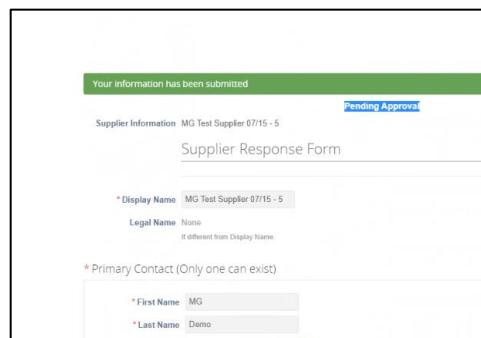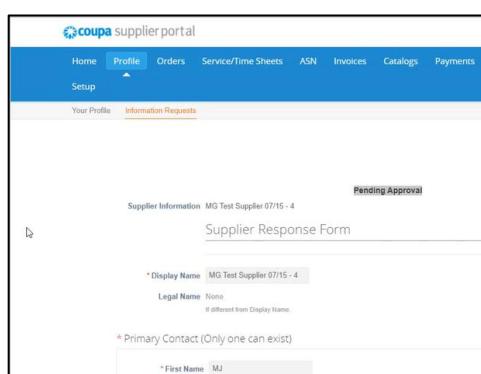
INFORMATION UPDATES (EXISTING SUPPLIERS)

There are two ways that suppliers can update their information for Enterprise Mobility:

1. Enterprise Mobility sends a request through Coupa to the supplier.

2. The supplier updates the information via the Coupa Supplier Portal.
   Note: The first time a supplier wants to update the information, they must contact Enterprise Mobility for the External Supplier Information Update Form.

Enterprise Mobility Requests Updates

The supplier receives an email notification update the information in Coupa.

- Suppliers should click **Update Profile** in the email to log in and complete the updates.
- After updating the information, the supplier clicks **Submit for Approval** to send the information back to Enterprise Mobility.

Supplier Initiates Updates

To make updates directly, the supplier should log into the Coupa Supplier Portal, click **Profile,** and then select the **Information Requests** tab.

Note: The supplier can also go to **Setup > Customer Setup** to edit their information. This information can be quickly added to the form.

The supplier should enter the necessary updates, and click **Submit for Approval**.

Notes: The supplier cannot update the remit-to address, but must provide a new remit-to address.
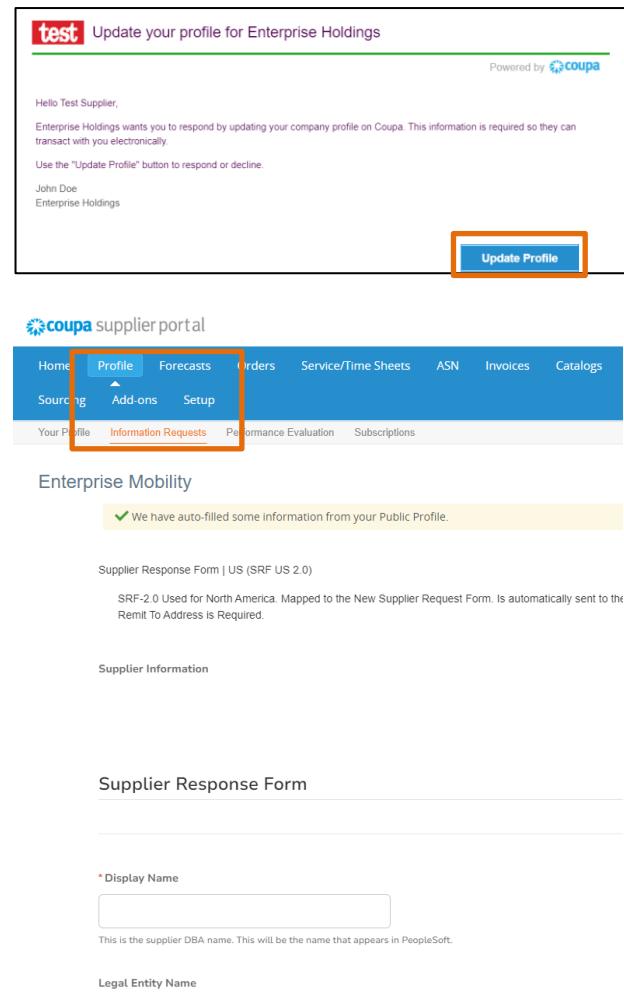
INTRODUCTION TO PURCHASE ORDERS (POS) AND INVOICES IN COUPA

Coupa offers several ways of receiving purchase orders and invoices for suppliers of all sizes:

❑ **Coupa Supplier Portal (CSP) –** This is the most comprehensive way for a supplier to manage interactions with Coupa by viewing all transactions from customers who use Coupa in one place. CSP allows suppliers to create invoices directly from purchase orders on the Coupa Supplier Portal for free.

❑ **Email with Supplier Actionable Notifications (SAN) –** Suppliers can also act on POs directly from email notifications for POs created in Coupa—such as acknowledge a PO, create an invoice from a PO, or add a comment to a PO. Suppliers that are already registered for the CSP can also take advantage of SAN.

❑ **cXML –** Integration with Coupa allows suppliers to receive purchase orders from Coupa. It is recommended to use cXML if the supplier has a punchout catalog with Enterprise Mobility. This is suitable for suppliers who want to automate PO handling.

NOTE ON INVOICING

Enterprise has a vast, decentralized footprint. This can make managing orders and payment difficult for both Enterprise and our Suppliers, when done outside of Coupa.

All the method's outlined above provide a convenient, easy way for Enterprise and our Suppliers to do business together with visibility throughout the ordering and payment process. These are our preferred methods of interacting with our Suppliers.

However, we realize some suppliers may not want to use the CSP or SAN emails for invoicing. In these instances, you may email the invoice directly to EM at invoices+USSharedServices@ehi.coupahost.com. For all invoices emailed, the invoice **MUST** reference the Coupa PO# or it will be rejected.

RECEIVING A PURCHASE ORDER VIA CSP

1. To view purchase orders:
    1. Log onto the Coupa Supplier Portal.
    2. From the home page, click **Orders**.
    3. Select **Enterprise Mobility** from the Select Customer dropdown menu.
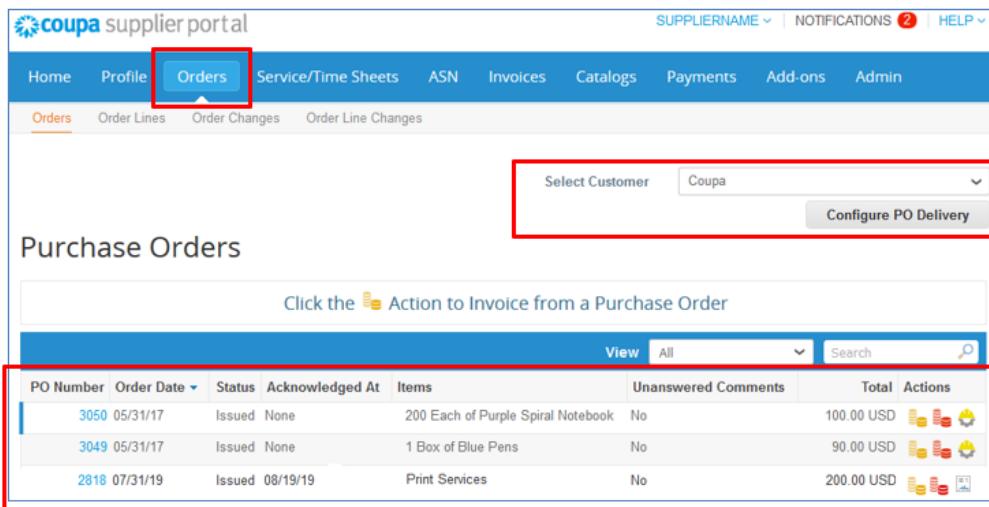
2. The Purchase Orders table shows key information for all the POs you received from Enterprise Mobility.

Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO.
Order Date	Date when the PO was created.
Status	Current status of the PO. For more information, see the PO status list below.
Acknowledged At	■ Date when the supplier acknowledged the receipt of the PO, or "None" if not acknowledged. ■ Suppliers can choose to let Enterprise Mobility know that they received the PO by selecting the **Acknowledged At** checkbox on the PO. 　■ When selected, the current date appears in the **Acknowledged At** column. 　■ This checkbox is a simple toggle, so they can also un-acknowledge an invoice by deselecting the checkbox. 　■ If re-acknowledged later, the new date appears.
Items	List of items on the PO.
Unanswered Comments	■ Supplier's comments on the PO for Enterprise Mobility and Enterprise Mobility' comments to which the supplier needs to respond. ■ Suppliers can see all Enterprise Mobility comments or add comments when they open the PO. ■ If suppliers need urgent communication, they should contact Enterprise Mobility directly.
Total	Total amount of the PO.
Actions	Click on the icons for the following actions: 　🟡 – Create (convert the PO into) an invoice. 　🔴 – Create a credit note. 　📄 – Create (convert the PO into) an advance ship notice (ASN).

3. POs can have the following statuses:

Status	Definition
Issued	The PO was approved and sent to the supplier.
Buyer Hold	The PO is approved but pending buyer review.
Cancelled	The PO is cancelled and does not need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	Something is wrong with the PO. Contact Enterprise Mobility to get the PO back on track.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

4. Click on the **Order Lines** tab to see information on the PO lines for each PO.
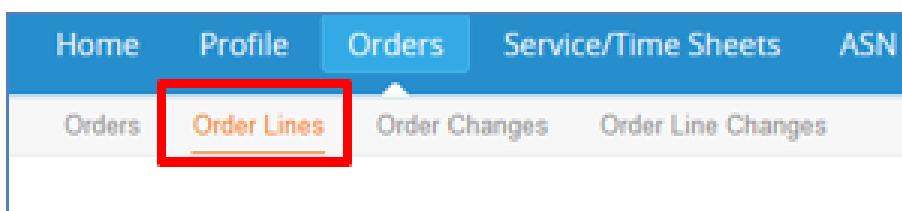
CREATING AN INVOICE VIA CSP

1. To create an invoice, click on the **Invoices** tab.
2. Select **Enterprise Mobility** from the Select Customer dropdown menu.

3. Click **Create Invoice from PO**. You will be redirected to the Purchase Order dashboard.

4. Search for the PO for which you want to create an invoice. Under the Actions column, click the **Create Invoice** icon (🪙).

5. A remit-to address is required prior creating an invoice. If not setup, the system will prompt you to create one.

6. After creating the Remit-To Address, add the invoice details. Fields marked with a red asterisk (*) are required fields.

7. *NOTE: A copy of the invoice <u>must </u> be attached under the Attachments section. You should also include any supporting documentation.
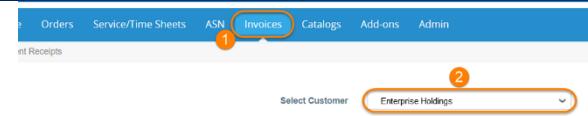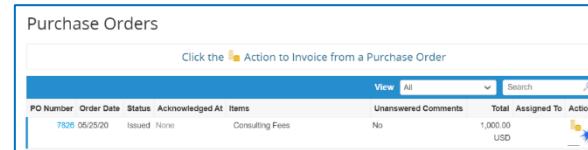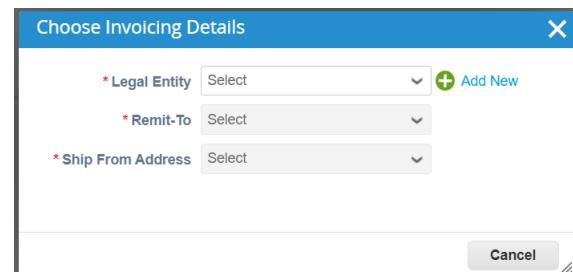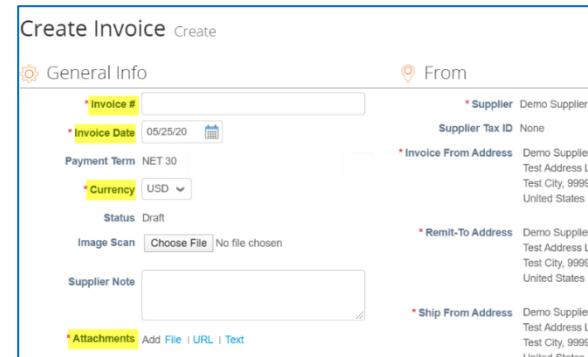
8. In the Lines section, change the line Price field (if service-based) or the Qty field (if item-based) for partial invoices.

9. Update other fields, such as Shipping, Miscellaneous, Handling, and Tax fees.

10. Once complete, click **Submit** and **Send Invoice.**
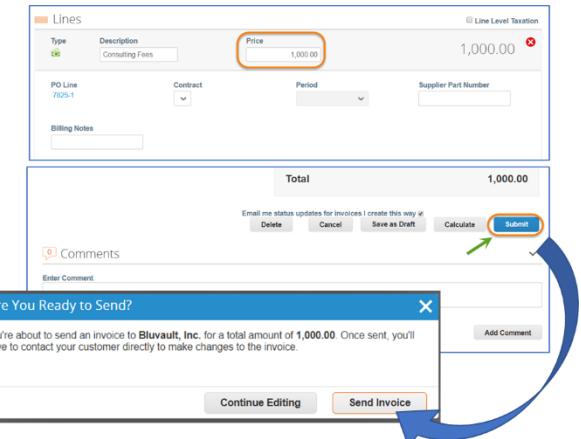
Note: After submitting the invoice, you are redirected to the Invoice page where you can view the status of the invoice.
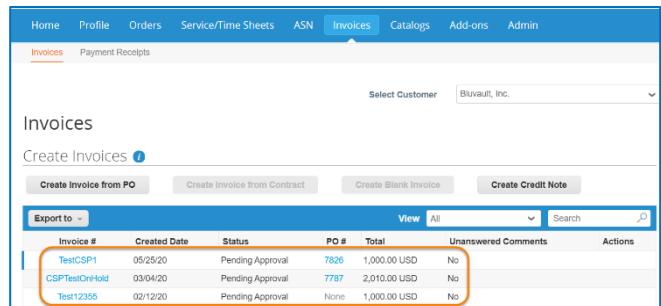
RECEIVING A PURCHASE ORDER VIA SAN

❑ An email enabled with **Supplier Actionable Notifications (SAN)** is sent to the supplier.

❑ When suppliers open the PO email notification there are four buttons available:

① **Manage Order** – Will take you to the CSP to perform various actions.

② **Create Invoice** – Create an invoice against a PO; can be a partial or full invoice.

③ **Acknowledge PO** – Acknowledge the PO. Requestors can extract reports of PO Pending Acknowledgement via **Activity > Orders**.

④ **Add Comment** – Add a note for the requestor.

Enterprise Holdings Purchase Order #US0000465758

Order Summary

Date	07/12/24
PO Total	5,000.00 USD
Shipping Terms	DES
Payment Terms	000
Contact	███████

① Manage Order   **②** Create Invoice

Orders details below

③ ✓ **④** 💬
Acknowledge PO   Add Comment
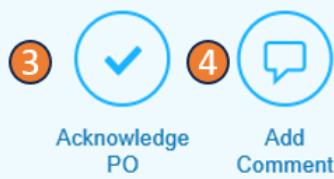
❑ Upon receiving the email, suppliers should acknowledge receipt of the purchase order by clicking the Acknowledge PO button.

Note: Suppliers also receive notifications after they submit an invoice, letting them know when Enterprise Mobility performs an action. This improves transparency and reduces the need for suppliers to track down the status of their invoice.

❑ Coupa has implemented One-Time-Passcode (OTP) as a security measure for SAN emails. You can view the PO (pdf) attached to the email without the OTP, but if you want to take any action such as acknowledging the PO, or creating an invoice, you will have to use the OTP.

   o If you are already registered on the Coupa Supplier Portal, you may forego the OTP and choose the option to login as you normally do.

CREATING AN INVOICE VIA SAN

1. To start an invoice, the click **Create Invoice** and then **Create New Remit-To**.

Choose Invoice From Address ✕

No Invoice From Addresses to choose from.

To add a new address click Create New Remit-To.

Cancel   Create New Remit-To
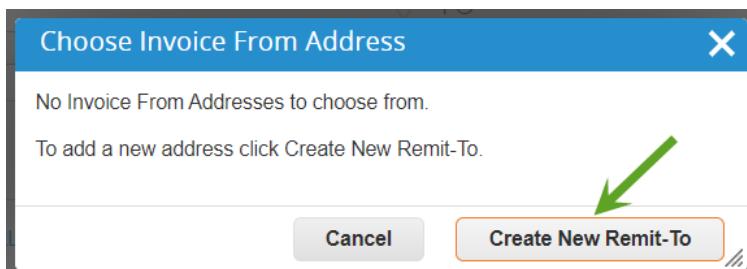
2. Before a Supplier can edit the invoice fields, a remit-to address is required. Enter the remit-to address in the pop-up window, if prompted.

   ■ When creating a remit-to address, the address section must be completed. The Tax Registration and Banking Information sections may be skipped.

   Note: Remit-to address creation is a one-time setup. Supplier can create a new one if needed.

Enter a new address ✕

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

Company Information

Supplier Bluvault Solutions
* Country United States

Address

Remit To Name
* Line 1
Line 2
* City
State
* Postal Code
Preferred Language English
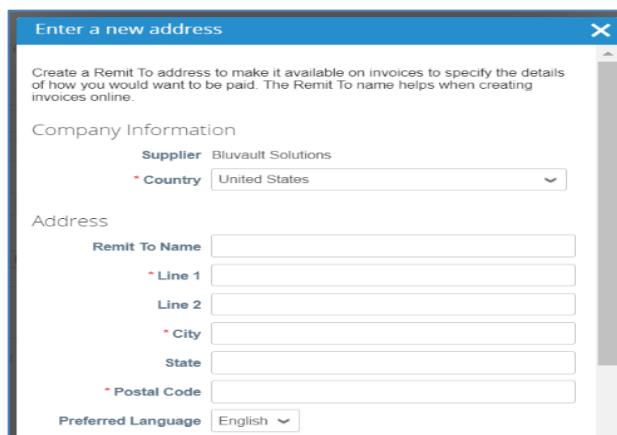
3. Once the remit-to address is created, enter the invoice details. Fields marked with a red asterisk (*) are required.

4. *NOTE: A copy of the invoice <u>**must**</u> be attached under the Attachments section. You should also include any supporting documentation.

coupa
Create Invoice Create

General Info   From
* Invoice #   * Supplier Bluvault, Inc.
* Invoice Date 05/25/20   Supplier Tax ID None
Payment Term NET 45   * Invoice From Address Bluvault, Inc.
* Currency USD   Test Address L
Status Draft   Test City, 9999
Image Scan Choose File No file chosen   United States
Supplier Note   * Remit-To Address Bluvault, Inc.
                                                        Test Address L
                                                        Test City, 9999
                                                        United States
* Attachments Add File | URL | Text * Ship From Address Bluvault, Inc.
                                                          Test Address L
                                                          Test City, 9999
                                                          United States

                                   To
                                   Customer Bluvault, Inc.

5. In the Lines section, change the line Price field (if service-based) or the Qty field (if item-based) for partial invoices.

6. Update other fields, such as Shipping, Miscellaneous, Handling, and Tax fees.

7. Once complete, click **Submit** and **Send Invoice**.

Note: Use the Comments section to communicate with Enterprise Mobility.

CREATING AN INVOICE VIA SAN, CONTINUED

❑ An email notification is sent to the supplier when the invoice is submitted successfully.

❑ Suppliers can view the status and additional comments.

RECEIVING A PURCHASE ORDER VIA CXML

❑ Coupa adheres to cXML standards. Please refer to the cXML User's Guide at cXML.org to learn more.

❑ If suppliers plan on receiving purchase orders via cXML, they should complete the Coupa cXML Supplier Questionnaire and provide it to their contact at Enterprise Mobility.

❑ For Suppliers set up for cXML, Coupa will send an OrderResponse cXML document with an OrderResponse document, which includes these required validation fields:

- Supplier domain
- Supplier identity
- Buyer domain
- Buyer identity
- Shared Secret

❑ Coupa supports the following cXML purchase order documents. Suppliers must return an OrderResponse within 60 seconds for every OrderRequest received.

cXML Document	Description
OrderRequest	Include the following elements: ■ Routing URL ■ Supplier domain and identity ■ Buyer domain and identity ■ Shared secret
OrderResponse	Post your cXML back to Coupa when you receive OrderRequest.

cXML Order Response Status Codes

Code	Meaning
2XX	Successful
5XX	Error, but the system will retry 5 times at 1-hour intervals
4XX	Error, and retries will not be successful

Supplier Quick Reference

Onboarding

- ❑ Most of the time, Suppliers will receive an email to join the Coupa Supplier Portal (CSP) from Enterprise Mobility (EM).
  - ▪ Click **Join and Respond** button in email to create an account.
  - ▪ Once the Coupa account is created, you must complete the **Supplier Response Form (SRF).**
- ❑ The SRF asks questions such as tax ID, billing remit to address, desired payment method, diversity status, and certificate of insurance.
- ❑ Once onboarding is complete, EM will email indicating you are ready to transact with EM.
  - ▪ Note: Any open invoices prior to onboarding will be handled through prior process.

Handling Purchase Orders

- ❑ To view POs in CSP, under the homepage click **Orders** and select **Enterprise Mobility** as customer.
  - ▪ You can see many details about the PO:
    - • PO#, Order Date, Status, Acknowledge Date, Line Items, Comments, Total
  - ▪ You can also take action on a PO from this screen, such as **Create Invoice** or **Create Credit Memo.**
- ❑ You can also view and take action on POs from email. These are called **Supplier Actionable Emails (SAN)**.
  - ▪ When you receive a PO notification email you can View the attached PO PDF, Create an Invoice, Acknowledge the PO, etc.
  - ▪ If you take any action other than viewing the PDF, you will need to sign in via a One-Time Passcode. If you have a Coupa account, however, you can bypass this OTC and login as you normally would.

Creating an Invoice via CSP

- ❑ From the CSP, you can either click on the Gold Coins icon from the PO screen outlined in the **Handling Purchase Orders** section above, or you can navigate to the **Invoices** tab in the CSP.
  - ▪ If you are viewing a PO and click on the Gold Coins icon to **Create Invoice**, you'll be taken to a screen to select or create a remit-to address.
  - ▪ A Remit-to-Address is always required prior to creating an invoice, unless one is already set up.

Creating an Invoice via CSP, Cont'd

- ▪ After choosing or creating the Remit-to-Address, you will need to add details to the invoice. The following must be entered:
  - ▪ Invoice Number, Invoice Date, Currency
  - ▪ If you are a U.S. supplier, you must attach a copy of the invoice. Canadian or International suppliers should not attach an invoice.
  - ▪ In the lines section of the invoice, you need to add pricing and any shipping or taxes.
- ❑ When ready, click **Submit** and then **Send Invoice**.
  - ▪ After submitting the invoice you are redirected to the Invoice page where you can view status.

Creating an Invoice via SAN

- ❑ As outlined under the **Handling Purchase Orders** section, you can create an invoice directly from a SAN email.
  - ▪ Click on the **Create Invoice** button within the email. Reminder, you will be presented with a OTP to login, but you can bypass this if you have a CSP account and login as you normally do.
- ❑ Once you are logged in either through the CSP or OTP process, you will be taken to the same screen as outlined in the **Creating an Invoice via CSP** section, where you must choose a remit-to address or **Create New Remit-To** address.

General Tips

- ❑ You may also email the invoice directly to EM at invoices+USSharedServices@ehi.coupahost.com. All invoices must reference the Coupa PO#, which can be found in the CSP or on a SAN email.
- ❑ Standard payment terms are Net 30 for ACH and 45 for Check
- ❑ You can create a **Credit Memo** by clicking on the Red Coins when viewing a PO.
- ❑ Suppliers with numerous transactions may be able to use cXML for invoicing. If you are interested, please email the EM Buyer Desk.
- ❑ The Coupa Supplier Portal is a great way to check status on POs and payments, as well as updating any account information, such as:
  - ▪ Tax ID / W9, Certificate of Insurance, Address Changes, etc.
- ❑ You can contact the EM Buyer Desk for support.