

A low-angle, close-up shot of a person's lower body and legs as they walk on a light-colored stone pavement. The person is wearing a grey, textured skirt and bright teal sneakers with white soles. Their shadow is cast onto the ground to the right. The background is a blurred stone wall. In the bottom left corner, there are partial views of a bright green and a dark purple circular graphic element.

SUPPLIER TRAINING GUIDE

CSP Orientation



TABLE OF CONTENTS

Home Page	4
Public profile	8
Managing your account	9
Notifications	10
Help tour & Online help	11
Announcements	12
Merging accounts	12
Chat with Coupa support	13

NAVIGATION

Click on the section name to navigate to the topic



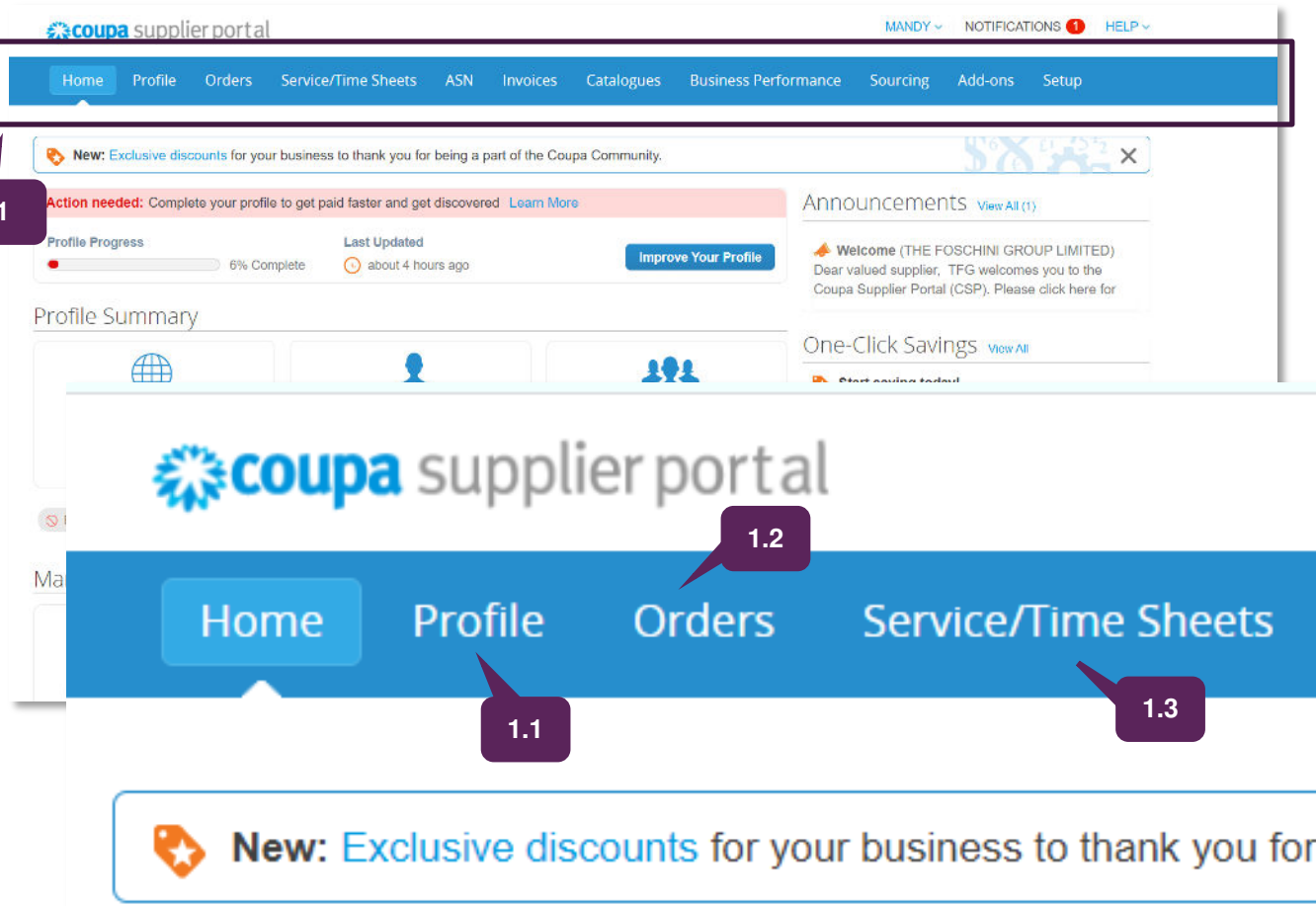
Click on Home button to return to Table of Contents



HOME

Coupa Supplier Portal (CSP) Orientation

TF
G

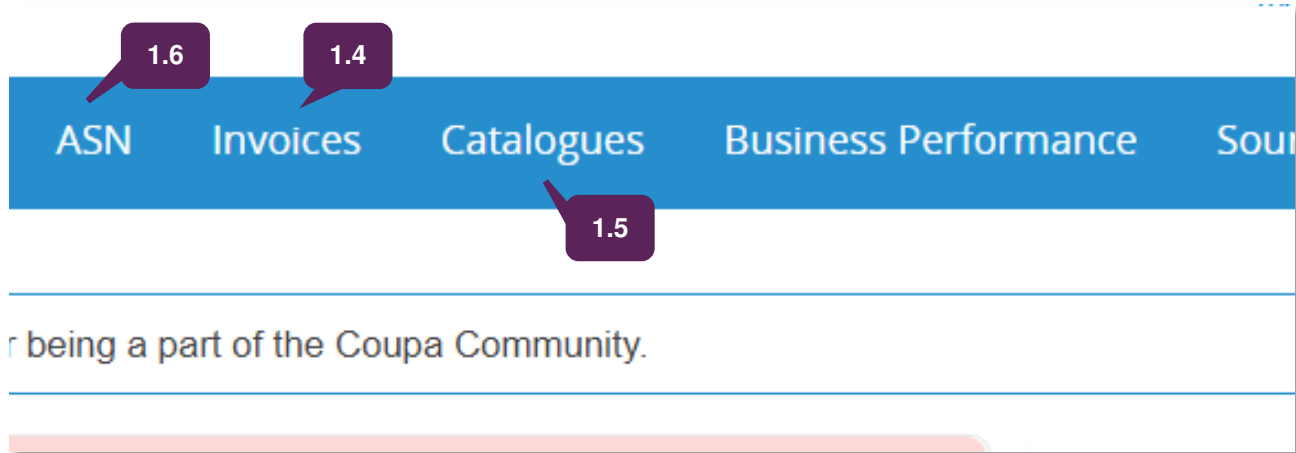


The screenshot shows the Coupa Supplier Portal interface. A purple box highlights the main navigation bar at the top, which includes tabs for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. A callout labeled '1' points to this bar. Below the navigation bar, there's a 'New' banner about exclusive discounts. A 'Profile Progress' section shows a 6% completion rate with a callout '1.1' pointing to the 'Profile' tab. An 'Announcements' section includes a welcome message from TFG. A 'Profile Summary' section shows icons for a globe, a person, and a group of people. A second, larger screenshot below shows a zoomed-in view of the navigation bar with callouts '1.2' pointing to the 'Orders' tab and '1.3' pointing to the 'Service/Time Sheets' tab. A 'New' banner is also visible at the bottom of this section.

From the '**Home**' tab, you can;

- View and improve your public company profile,
- See the list of customers you are connected to
- Edit your customer-specific company profile and
- Merge accounts.

1.	Multiple tabs display on your main menu bar.
1.1	Profile: Create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
1.2	Orders: View purchase orders you received from TFG (and your other customers).
1.3	Service/Time Sheets: View the list of service/time sheets and related purchase order lines.



1.4	Invoices: Create and manage invoices to send to your customers.
1.5	Catalogues: Create and manage customer-specific catalogues.
1.6	ASN: Send advance ship notice, that is, notifications about when you ship items to your customers.

MANDY ✓ | NOTIFICATION

1.8

Catalogues

Business Performance

Sourcing

Add-ons

1.7

a Community.

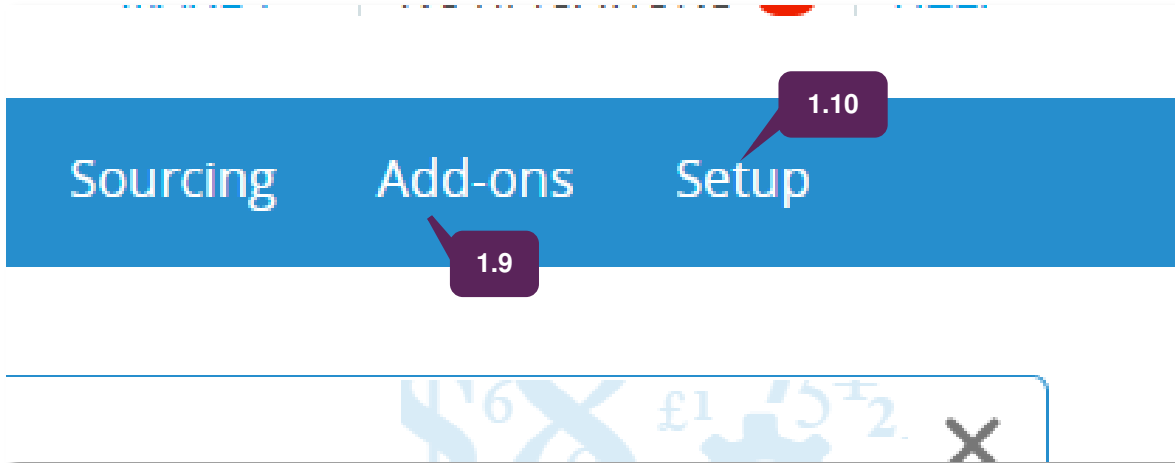
1.7

Business Performance: Click on the '**Business Performance**' tab to view;

- a summary of orders and invoices that may need attention and
- year-to-date order, invoice, and delivery time trends.

1.8

Sourcing: Click on the '**Sourcing**' tab to find and participate in public events created by other customers that use Coupa.



1.9

Add-ons: Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.

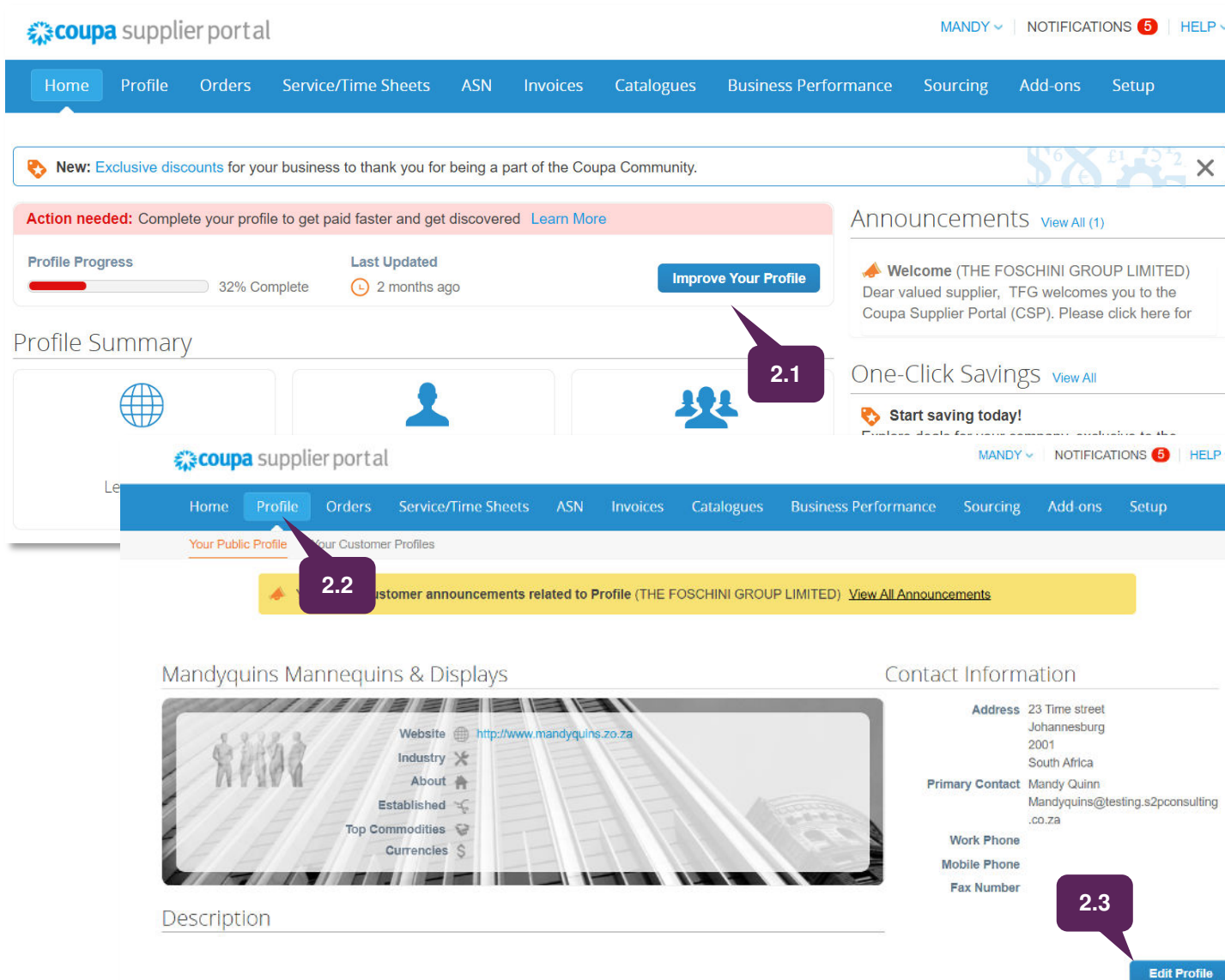
Note: Only supplier admin users can see this page.

Click on the following link to learn more about Add-ons;
https://success.coupa.com/Support/Releases/Old/23/New_Features/BSM_Platform/Coupa_Supplier_Portal/Supplier_Add-ons

1.10

Setup: Click on the '**Setup**' page to manage

- Users
- Merge requests,
- Remit-to addresses for your customers
- Set up legal entities
- Set up fiscal representatives
- View and sign the terms of use
- Set your early payment discount terms (Coupa Accelerate preferences)
- Create SFTP accounts and
- View cXML submission errors



The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information 'MANDY' with a dropdown arrow, 'NOTIFICATIONS 5', and a 'HELP' link. Below the header is a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. A red banner below the navigation bar states: 'Action needed: Complete your profile to get paid faster and get discovered. Learn More'. Below this is a 'Profile Progress' section showing a progress bar at 32% Complete and 'Last Updated' 2 months ago. A blue button labeled 'Improve Your Profile' is highlighted with callout 2.1. To the right of the progress bar is an 'Announcements' section with a 'View All (1)' link. Below the announcements is a 'One-Click Savings' section with a 'View All' link. The main content area is titled 'Profile Summary' and contains three icons: a globe, a person, and a group of people. Below the icons is a 'coupa supplier portal' logo. A yellow banner below the profile summary contains callout 2.2 and the text 'customer announcements related to Profile (THE FOSCHINI GROUP LIMITED) View All Announcements'. Below the yellow banner is a section for 'Mandyquins Mannequins & Displays' with a 'Description' field. To the right of the description is a 'Contact Information' section with fields for Address, Primary Contact, Work Phone, Mobile Phone, and Fax Number. A blue button labeled 'Edit Profile' is highlighted with callout 2.3.

2

2.1

2.2

2.3

2 Create and update Public Profile

In the CSP, you have a Coupa Public Profile as well as a customer specific profile i.e. TFG specific profile.

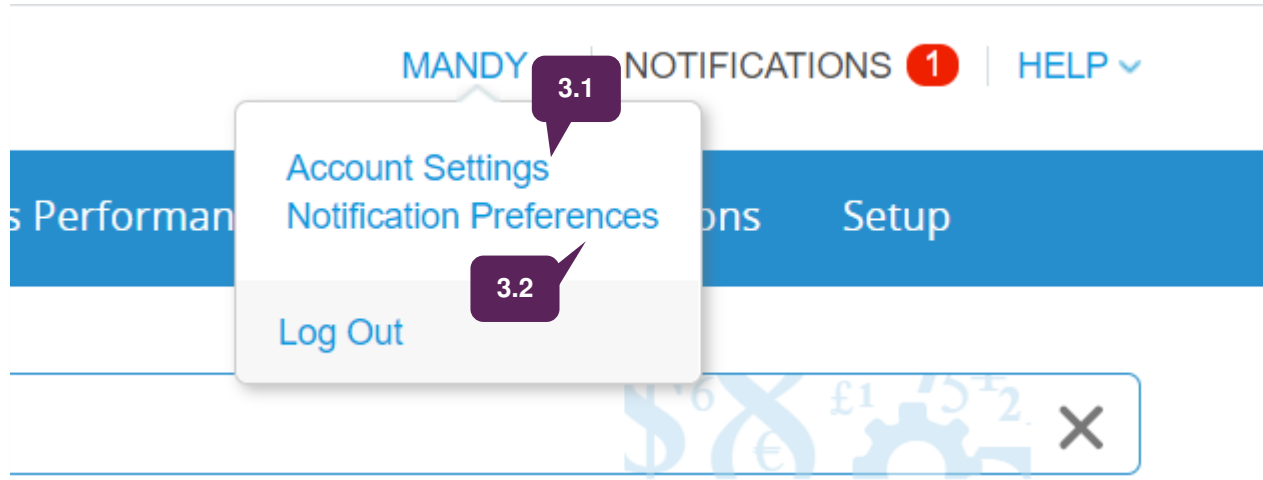
Your public profile is created when you create your account and it contains general information about your company, for example,

- Name
- Logo
- Website
- Industry
- Year of establishment
- Top commodities
- Currencies,
- Diversity, and
- Corporate social responsibility rating

2.1 Click on 'Improve Your Profile' to update

2.2 Alternatively, click on the 'Profile' Tab,

2.3 then click on 'Edit Profile'



Step 3

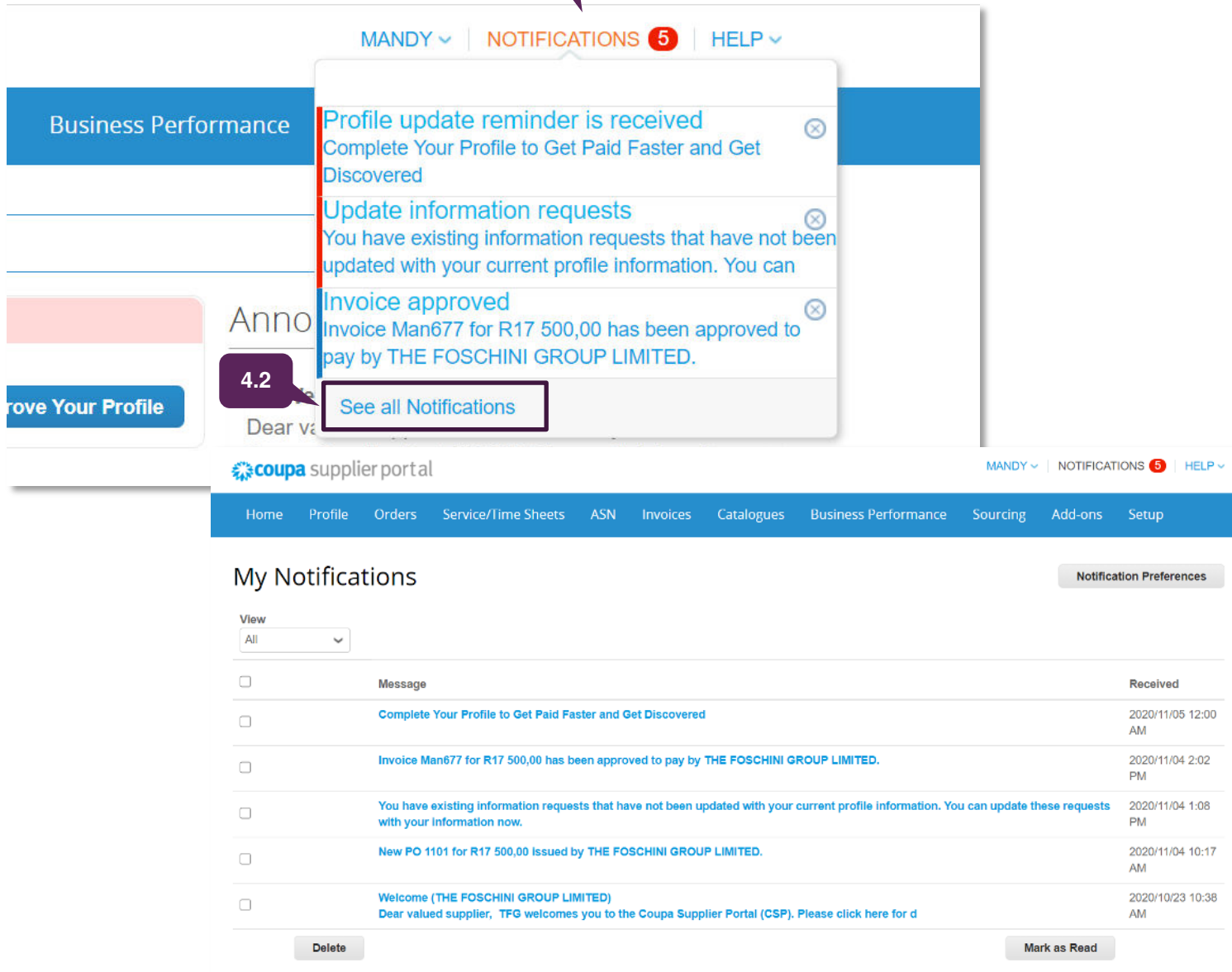
Manage your account

By hovering over your name, you can make changes to your 3.1 **Account settings** i.e.

- Name
- Department
- Role and
- Password

As well as set or modify your 3.2 **Notification Preferences** and enable/disable two-factor authentication.

4.1



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'MANDY', 'NOTIFICATIONS 5', and 'HELP'. Below this, a dropdown menu is open, displaying three notifications: 'Profile update reminder is received', 'Update information requests', and 'Invoice approved'. Each notification has a close button (X). At the bottom of the dropdown is a link 'See all Notifications'. A callout box labeled '4.2' points to this link. The main content area shows the 'My Notifications' section with a table of notifications and a 'Notification Preferences' button.

Message	Received
<input type="checkbox"/> Complete Your Profile to Get Paid Faster and Get Discovered	2020/11/05 12:00 AM
<input type="checkbox"/> Invoice Man677 for R17 500,00 has been approved to pay by THE FOSCHINI GROUP LIMITED.	2020/11/04 2:02 PM
<input type="checkbox"/> You have existing information requests that have not been updated with your current profile information. You can update these requests with your information now.	2020/11/04 1:08 PM
<input type="checkbox"/> New PO 1101 for R17 500,00 Issued by THE FOSCHINI GROUP LIMITED.	2020/11/04 10:17 AM
<input type="checkbox"/> Welcome (THE FOSCHINI GROUP LIMITED) Dear valued supplier, TFG welcomes you to the Coupa Supplier Portal (CSP). Please click here for d	2020/10/23 10:38 AM

4

View and Manage Notifications

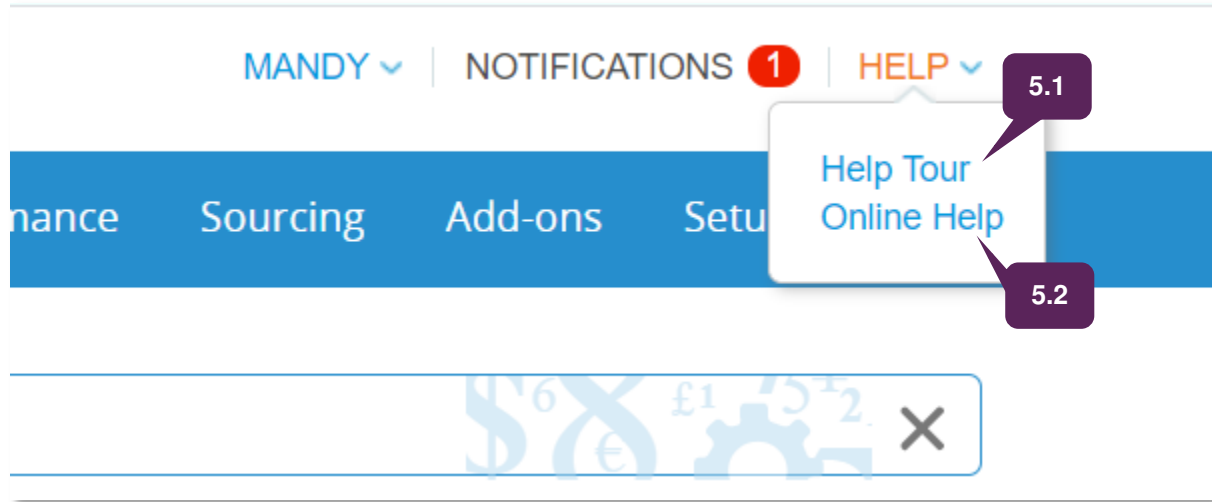
4.1

Hover your cursor over the **'Notifications'** hyperlink to see your unread system notifications.

Only the three most recent notifications are shown.

4.2

To view all the notifications with their details and to manage them, click on the **'Notifications'** or the **'See All Notifications'** hyperlink.




5	Help Tour & Online Help
When you log in for the first time, you are greeted by the Help Tour (welcome tour) on the Home screen. Click on the Help hyperlink in the top right corner of the page to access the;	
5.1	Help Tour
5.2	Online Help


MANDY ▾ | NOTIFICATIONS 5 | HELP ▾

Performance Sourcing Add-ons Setup

Announcements [View All \(1\)](#)

 **Welcome** (THE FOSCHINI GROUP LIMITED)
Dear valued supplier, TFG welcomes you to the Coupa Supplier Portal (CSP). Please click here for

One-Click Savings [View All](#)

 **Start saving today!**
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

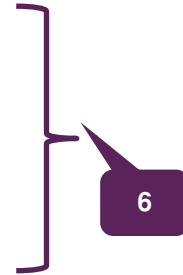
If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

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

Rose Tra Enterprises
rte@testing.s2pconsulting.co.za

7.1 Request Merge **7.2** Remove

Joint Prosperity



6

Announcements

In the Announcements section you can view important information that has been published by TFG (or any other customers using Coupa).

7

Merge Accounts

If you have more than one Coupa account/profile, Coupa will show suggestions to merge accounts (based on the email domain).

7.1

If you want to merge an account, click on the Request Merge button

7.2

and if you wish to keep accounts separate click Remove.

Refer to guide ((04_CSP Merging CSP Accounts) on how to merge accounts.

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.](#)

Rose Travel and Enterprises


s2pconsulting.co.za

[Chat with Coupa Support](#)

Announcements [View All \(1\)](#)

 **Welcome** (THE F) Dear valued supplier, Coupa Supplier Portal

One-Click Saving

 **Start saving today** Explore deals for your Coupa Community.

Merge Account

If your company has multiple accounts, 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.](#)

Rose Travel and Enterprises

s2pconsulting.co.za

[Chat with Coupa Support](#)

Chat with Coupa Support

This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly.

This chat session will be saved as part of the supplier support request ticket. Continuing with this session will constitute your consent for this action.

*First Name

*Last Name

*Email

Phone

[Start Chat](#)

8	<h2>Chat with Coupa Support</h2> <p>Whether you are logged in to the CSP or not, you can chat with Coupa Support to get a quick response or resolution to your case.</p> <p>Note: Do not use this chat option if you wish to communicate directly with TFG.</p> <p>Note: To communicate with TFG, please use this email address: tfgprocurement@tfg.co.za</p>
8.1	Click Chat with Coupa Support in the bottom right corner of the page to launch the chat.
8.2	<p>Provide your contact information: first name, last name, email address, and phone number (optional).</p> <p>Note: If you are logged in to the CSP, your contact information is pre-populated, but you can modify it.</p>
8.3	Click on the “Start Chat” button to start chatting with the support agent.



HOME

TF
G

THANK YOU