SUPPLIER TRAINING GUIDE

CSP Orientation

TABLE OF CONTENTS

NAVIGATION   Click on the section name to navigate to the topic   Click on Home button to return to Table of Contents
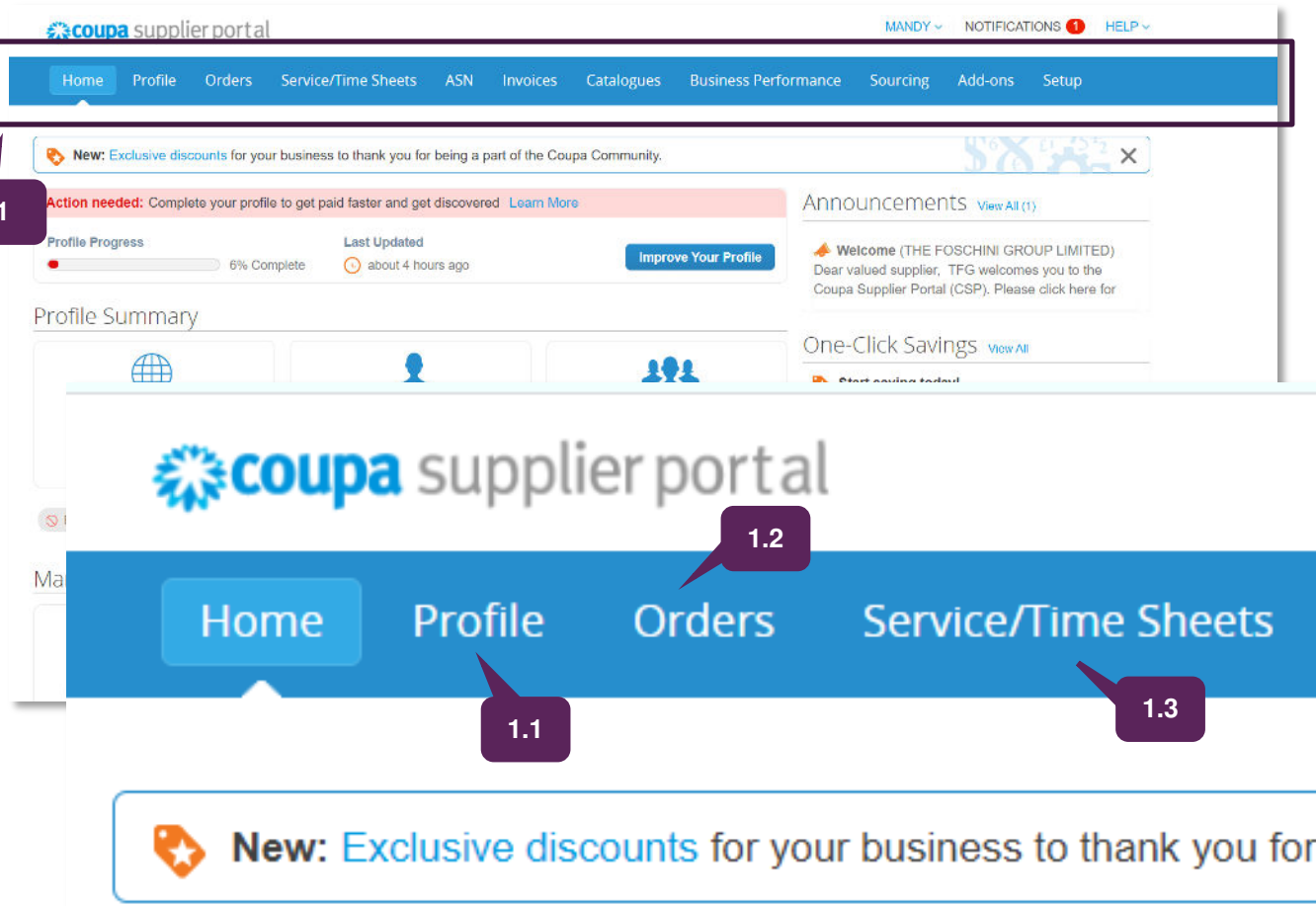
Coupa Supplier Portal (CSP) Orientation
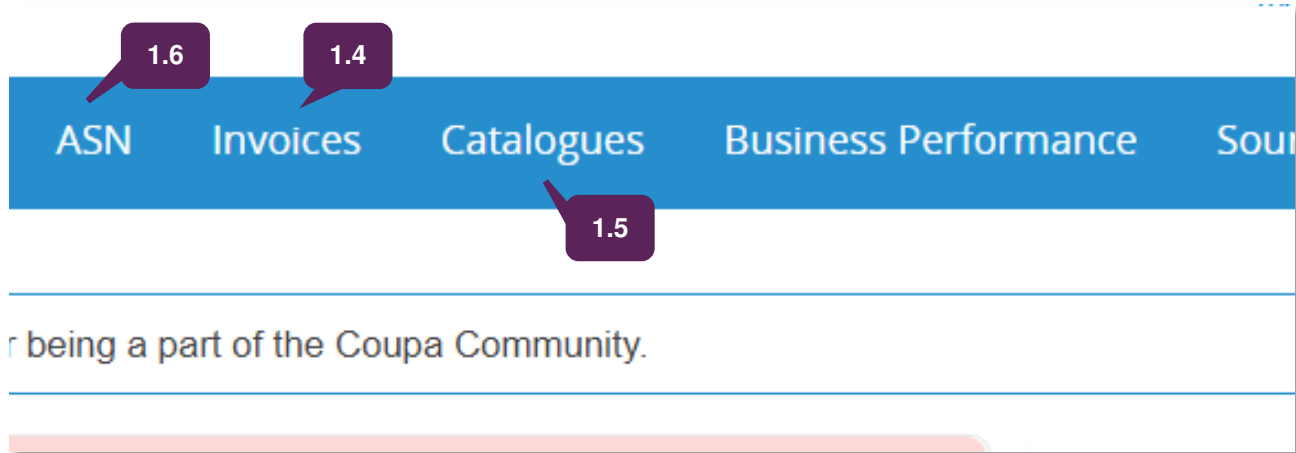
TFG

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.

ASN | Invoices | Catalogues | Business Performance | Sour

1.6 | 1.4 | 1.5

r being a part of the Coupa Community.

| 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.

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.

Sourcing   Add-ons   Setup

1.10

1.9
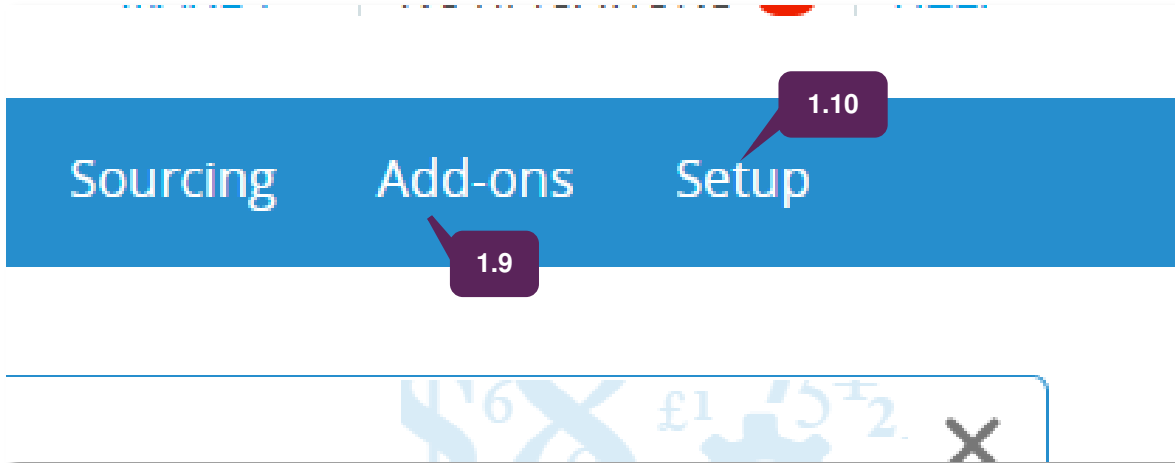
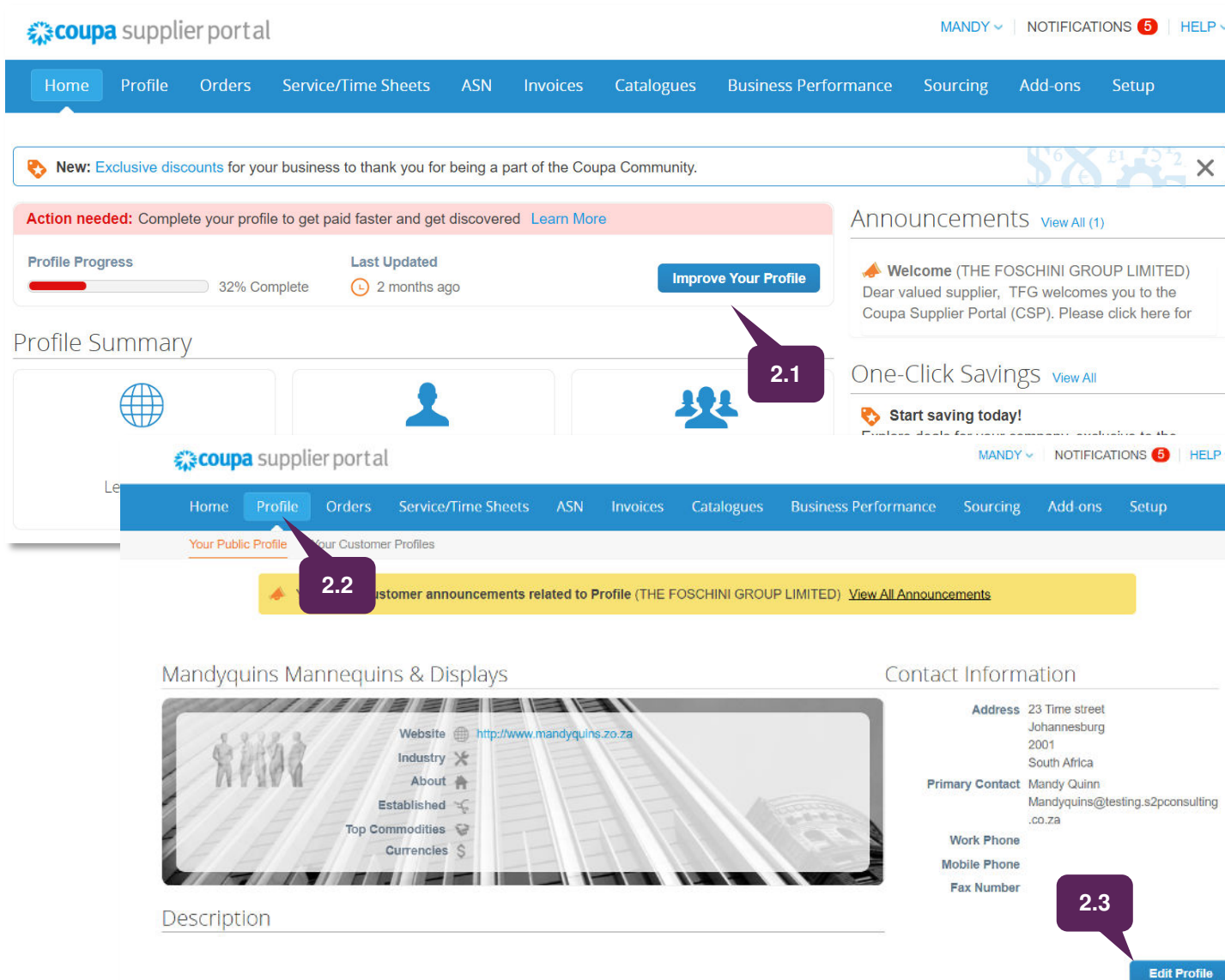|	
1.9	**Add-ons**: Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more. **Note**: Only supplier admin users can see this page. Click on the following link to learn more about Add-ons; https://success.coupa.com/Support/Releases/Old/23/New_Features/BSM_Platform/Coupa_Supplier_Portal/Supplier_Add-ons
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

Public Profile

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**'

Managing your account
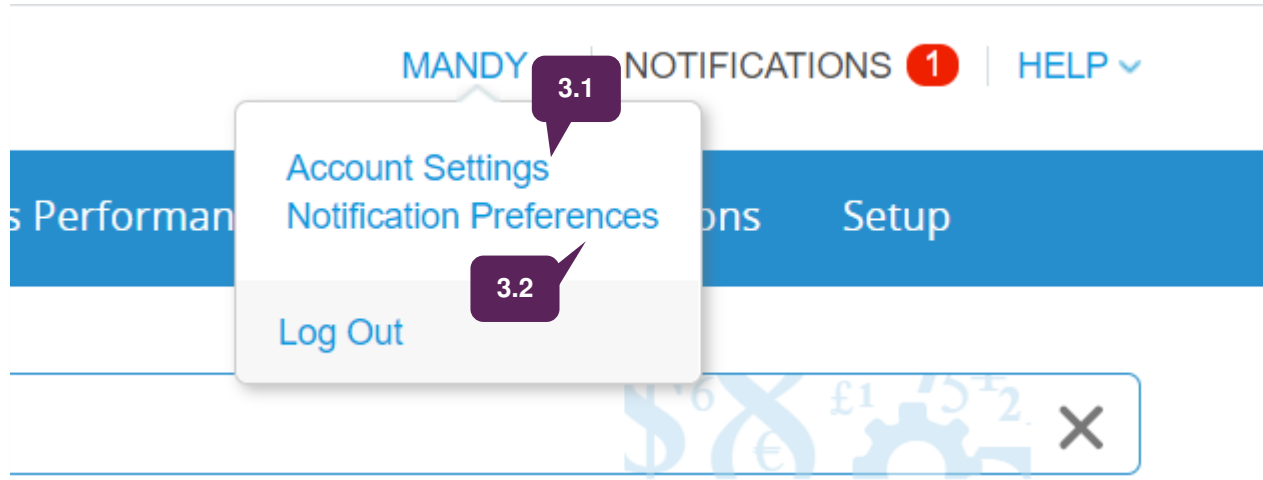
Step 3	Manage your account
By hovering over your name, you can make changes to your 3.1 **Account settings** i.e. • Name • Department • Role and • Password As well as set or modify your 3.2 **Notification Preferences** and enable/disable two-factor authentication.	

Notifications

4.1

MANDY ⌄ | NOTIFICATIONS **5** | HELP ⌄

Business Performance

Profile update reminder is received ⊗
Complete Your Profile to Get Paid Faster and Get Discovered

Update information requests ⊗
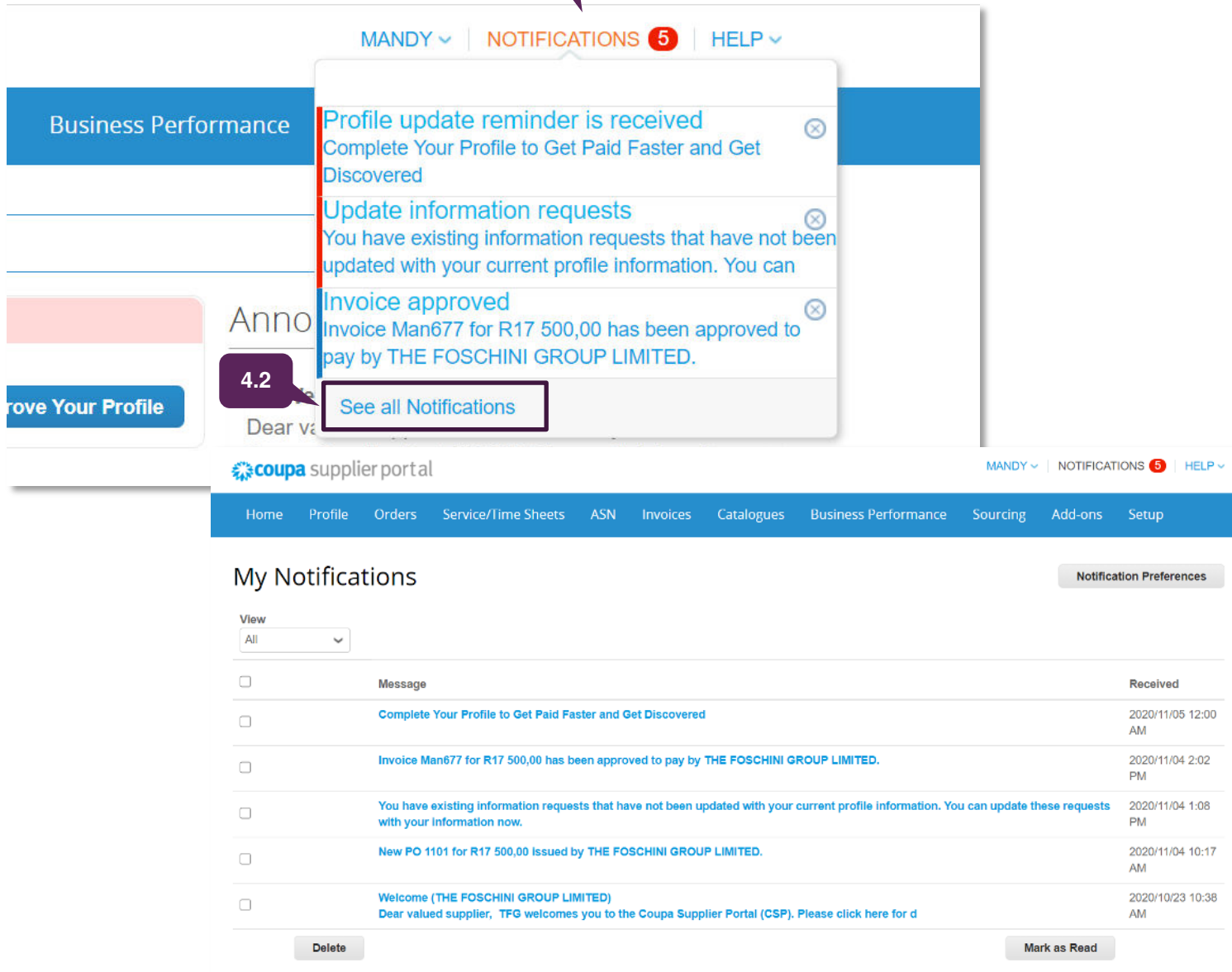You have existing information requests that have not been updated with your current profile information. You can

Invoice approved ⊗
Invoice Man677 for R17 500,00 has been approved to pay by THE FOSCHINI GROUP LIMITED.

4.2

See all Notifications

Anno...

rove Your Profile

Dear va...

---

coupa supplier portal

MANDY ⌄ | NOTIFICATIONS **5** | HELP ⌄

Home   Profile   Orders   Service/Time Sheets   ASN   Invoices   Catalogues   Business Performance   Sourcing   Add-ons   Setup

My Notifications

Notification Preferences

View
All

☐	Message	Received
☐	Complete Your Profile to Get Paid Faster and Get Discovered	2020/11/05 12:00 AM
☐	Invoice Man677 for R17 500,00 has been approved to pay by THE FOSCHINI GROUP LIMITED.	2020/11/04 2:02 PM
☐	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
☐	New PO 1101 for R17 500,00 Issued by THE FOSCHINI GROUP LIMITED.	2020/11/04 10:17 AM
☐	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

Delete   Mark as Read

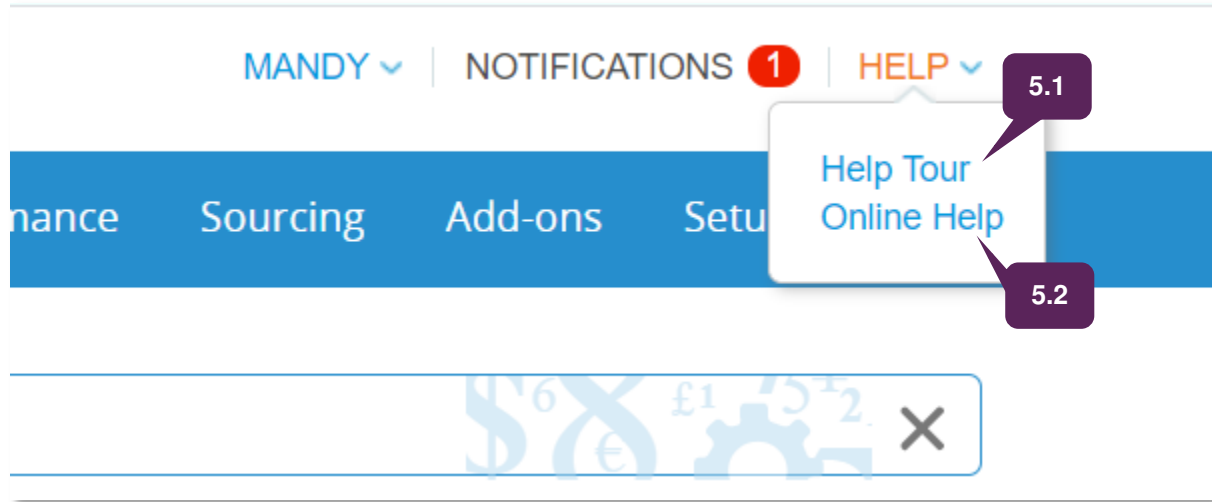| **4**	**View and Manage Notifications**
4.1	Hover your cursor over the '**Notifications**' hyperlink to see your unread system notifications. Only the three most recent notifications are shown.
4.2	To view all the notifications with their details and to manage them, click on the '**Notifications**' or the '**See All Notifications**' hyperlink.

Help Tour & Online Help

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

Announcements & Merging Accounts

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

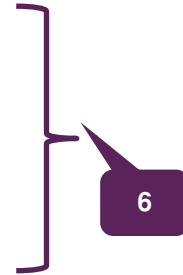| 7	**Merge Accounts**
If you have more than one Coupa account/profile, Coupa will show suggestions to merge accounts (based on the email domain).	
7.1	If you want to merge an account, click on the Request Merge button
7.2	and if you wish to keep accounts separate click Remove.
Refer to guide ((04_CSP 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.

8.1

Rose Travel and Enterprises

s2pconsulting.co.za

💬 Chat with Coupa Support

Announcements View All (1)

📢 **Welcome** (THE FG
Dear valued supplier,
Coupa Supplier Portal

One-Click Savi

🏷️ **Start saving toda**
Explore deals for your
Coupa Community.

Merge Account

If your company has m
try to list it below. Cons
confusion for existing a

Not seeing the account
here.

Rose Trav

rte@testing.s2pconsul

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
Mandy

*Last Name
Quinn

*Email
Mandyquins@testing.s2pconsulting.co.za

Phone

8.2

Start Chat

8.3

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

THANK YOU

TFG