FE
FORWARD

Coupa Supplier Portal (CSP) Webinar

Agenda

Introduction

Logging in to the Coupa Supplier Portal (CSP)

- Accepting an email invitation

Profile Setup

- Setting up Multi-factor Authentication
- Managing Additional Users
- Managing Notification Settings
- Creating Legal Entities

Submitting Invoices

- Finding Orders
- Creating Invoices from PO

Finding Remittance

- Navigating the Invoices table
- Creating Custom Views

* Estimated total duration: *1.5 hours*

1 – Introduction

- What is the Coupa Supplier Portal (CSP)

Implementing Coupa is part of a larger effort to deliver a more integrated source-to-pay platform that will help FirstEnergy better manage supplier spend

By having a centralized, standardized and transparent platform, Supply Chain can make informed buying decisions for FirstEnergy to meet our business needs and better serve our customers. Coupa provides a direct portal for Suppliers to streamline transactions with First Energy.

Dedicated Portal

- Access purchase orders and invoices in one place
- Add in additional users as needed to manage transactions
- Multi-factor authentication helps keep data secure

Reduced Transactional Workload

- Streamline invoicing from purchase orders with minimized data entry
- Visibility into invoice and payment statuses
- Communicate directly with FirstEnergy regarding specific documents

Digitally-Managed Supplier Information

- New suppliers will be able to provide their information through a secure, digital channel.
- Existing suppliers may work with their FirstEnergy contact to update their information

4

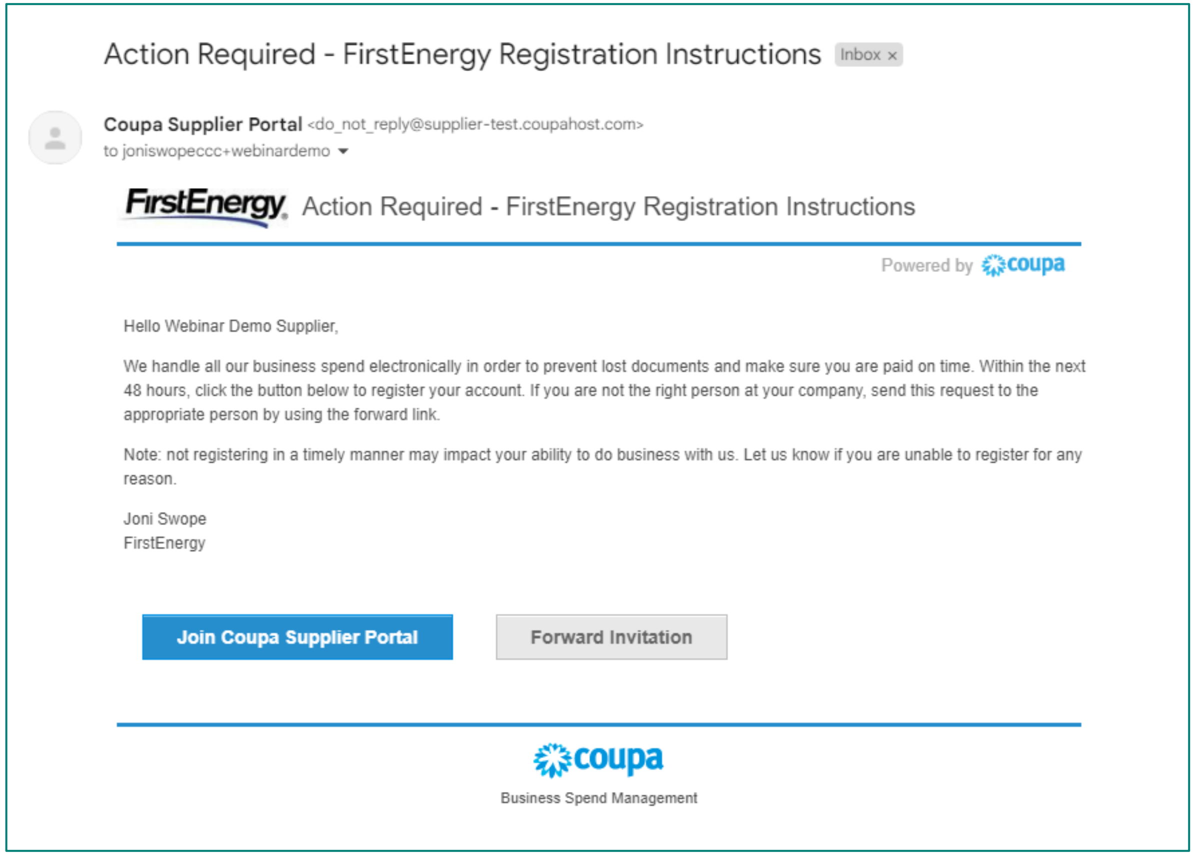
2 - Logging into the Coupa Supplier Portal (CSP)

- Accepting an email invitation

Accepting a Connection Invitation

Suppliers will have received a connection invitation via email.

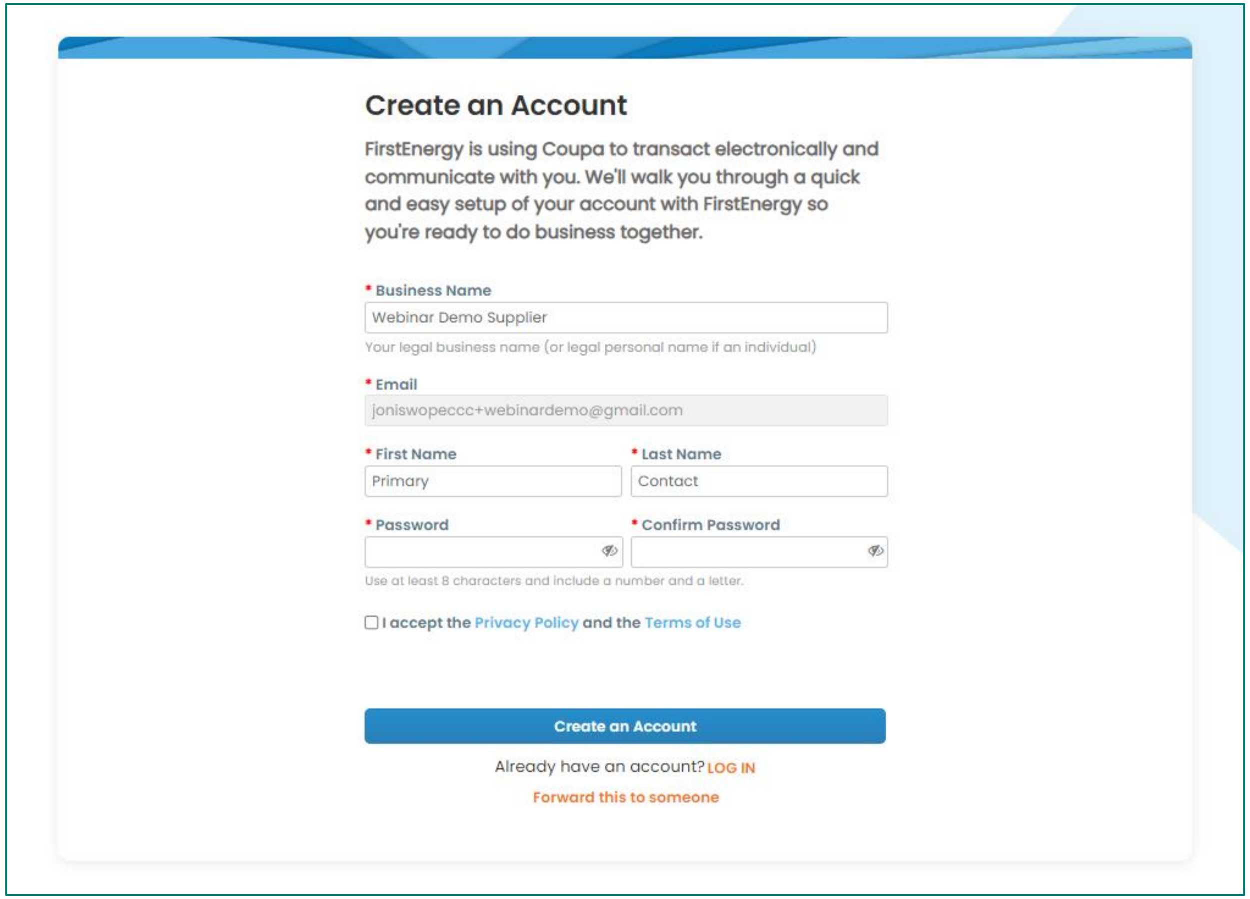
- The invitation email will be sent to the **Primary Contact.**
  - — The Primary Contact is considered the Administrator of the Supplier's CSP account and does not have to be the primary business contact.
- Click **Join Coupa Supplier Portal** to continue.
  - — *Note: Check your Spam or Junk folders if you have not received an expected invitation.*



Creating an Account

Suppliers without existing accounts will be prompted to create an account. Suppliers with an existing CSP account may Log In instead.

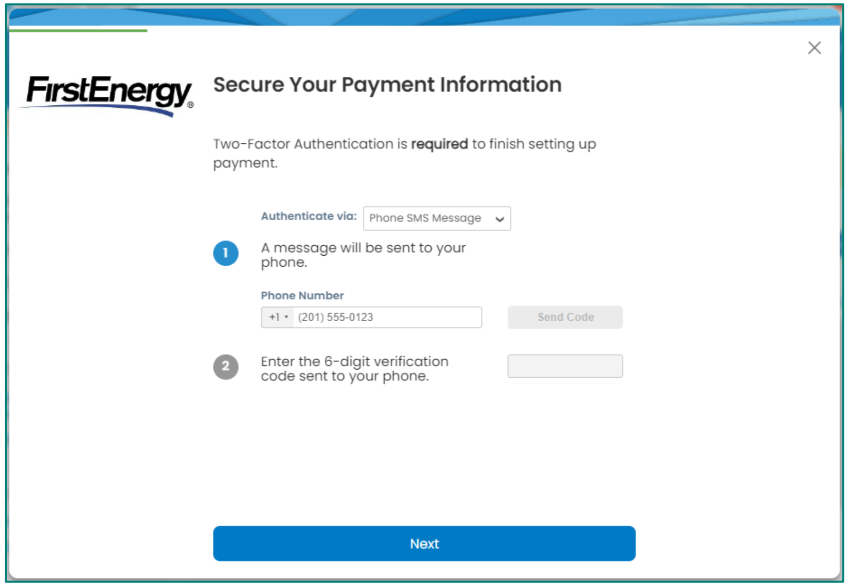
- Suppliers without an existing CSP account will need to complete the required fields to create an account.
  - Required fields are marked with a red asterisk (*).
  - A one-time verification code will be sent to the primary contact’s email. Future codes will be provided via multi-factor authentication when needed.
- Suppliers with an existing CSP account will be able to Log In instead.
  - The login email must match the address where the invitation was received.

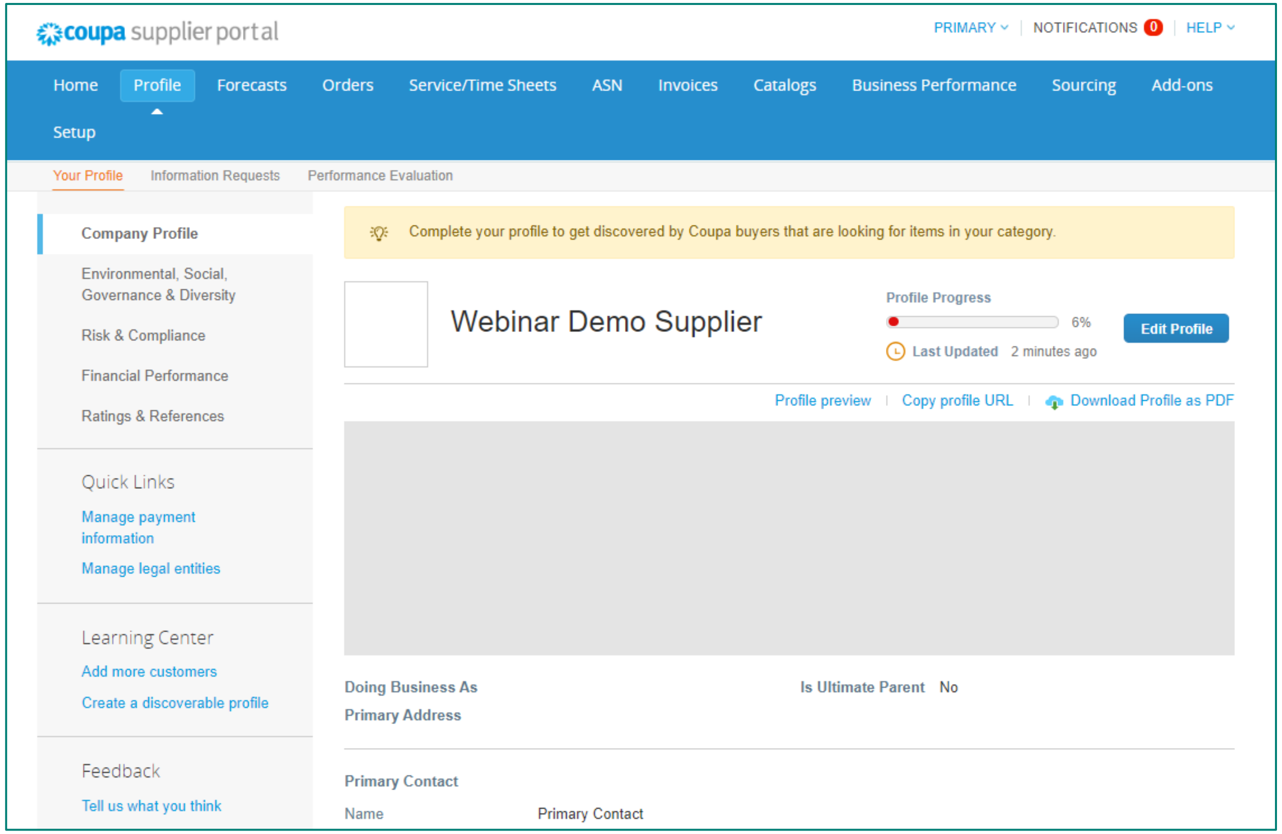


Home Page and Multi-Factor Authentication

Suppliers will be prompted to setup Multi-Factor Authentication (MFA or 2FA) after the first log-in. After either setting up MFA or exiting the MFA widget, the home page will be displayed.

- Multi-factor authentication will be covered in the next section.
- *Note: Coupa Verification is a paid service and is not required to do business with FirstEnergy.*





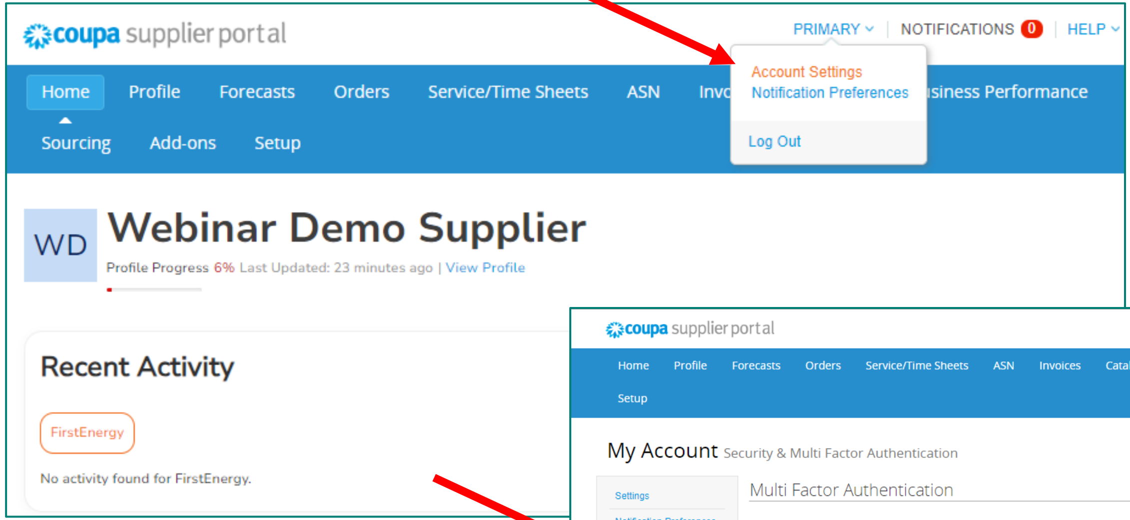
3 – Profile Setup

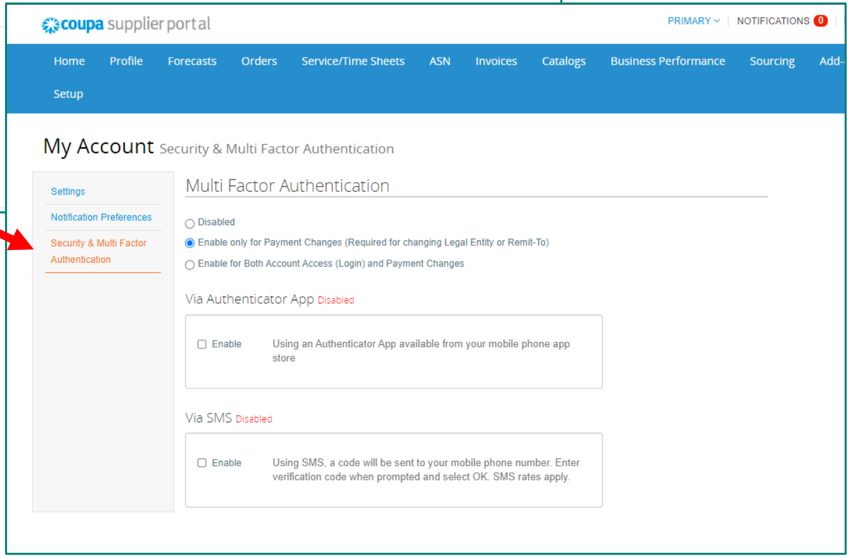
- Setting up Multi-Factor authentication
- Managing Additional Users
- Managing Notification Settings
- Creating Legal Entities

Setting up Multi-Factor Authentication

Multi-Factor Authentication (MFA) is required to manage legal entities and other financial details. Suppliers may choose to use an authentication app or to use SMS – however, the authentication app method is more secure and is the recommended method.

- Suppliers will be prompted to set up MFA as part of their first log-in.
- Suppliers with existing CSP accounts will need to navigate to the Account Settings page instead.
  - Hover over the **Name Menu**
  - Click **Account Settings**
  - Click **Security & Multi Factor Authentication**



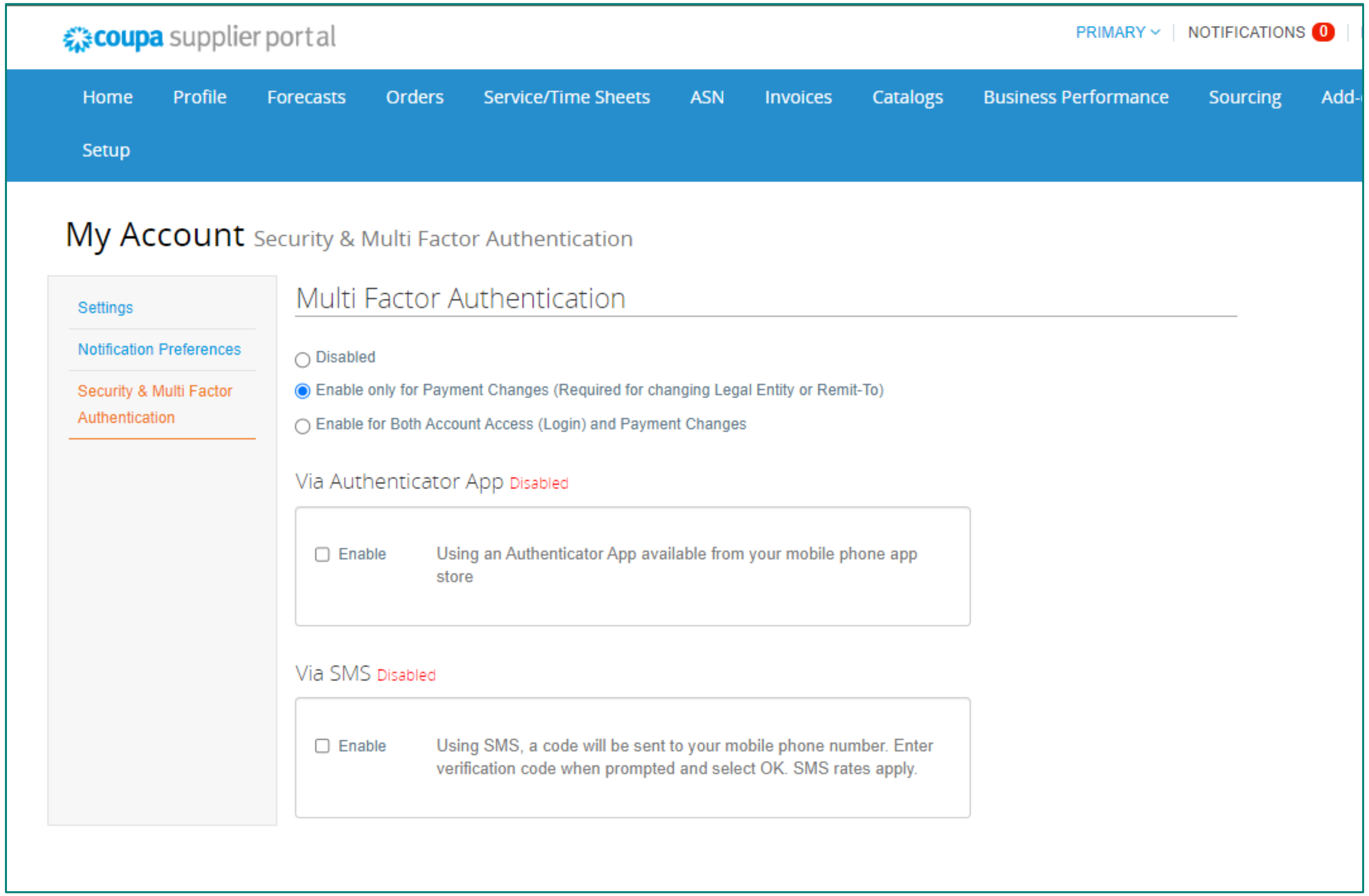


10

Setting up Multi-Factor Authentication

Select the desired settings for MFA.

- Enable MFA
  - Minimum requirement: Enable only for Payment Changes
  - More secure: Enable for Both Account Access (Login) and Payment Changes
- Via Authenticator App
  - Most secure
  - Free authenticator apps through Microsoft, Google, etc.
- Via SMS
  - Will send a code through text
  - Often slower to deliver codes than an authenticator app

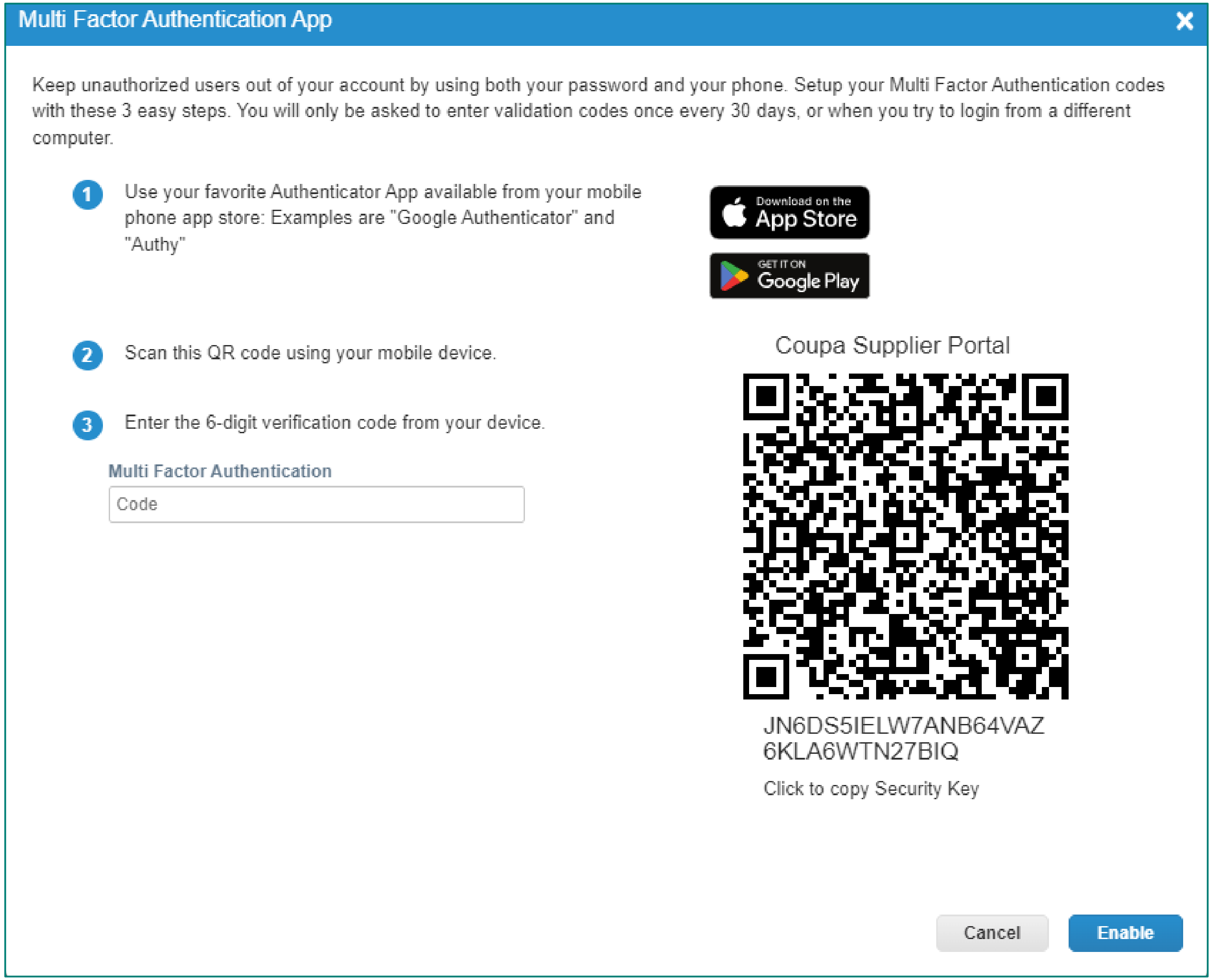


11

Setting up MFA – Authentication App

Follow the prompts to complete MFA setup.

- Use the authenticator app to scan the QR code.
- The app will display a 6-digit code. Enter that code in the box.
  - — This code is time-sensitive.
- Click **Enable.**

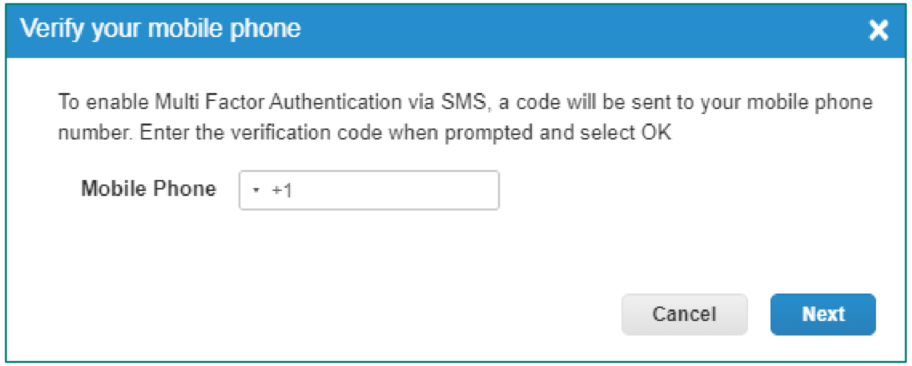


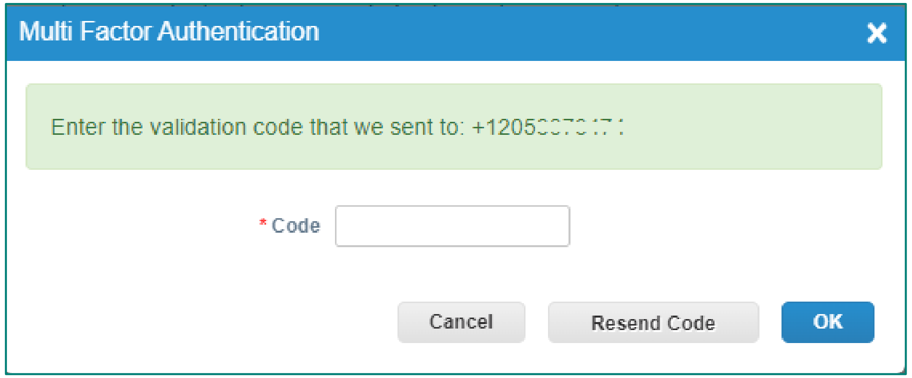
12

Setting up MFA – SMS

Follow the prompts to complete MFA setup.

- Enter the desired phone number.
  - — This must be a text-enabled phone number.
- Click Next.
- A code will be texted to the provided number. Enter it on the next pop-up.
- Click **OK.**



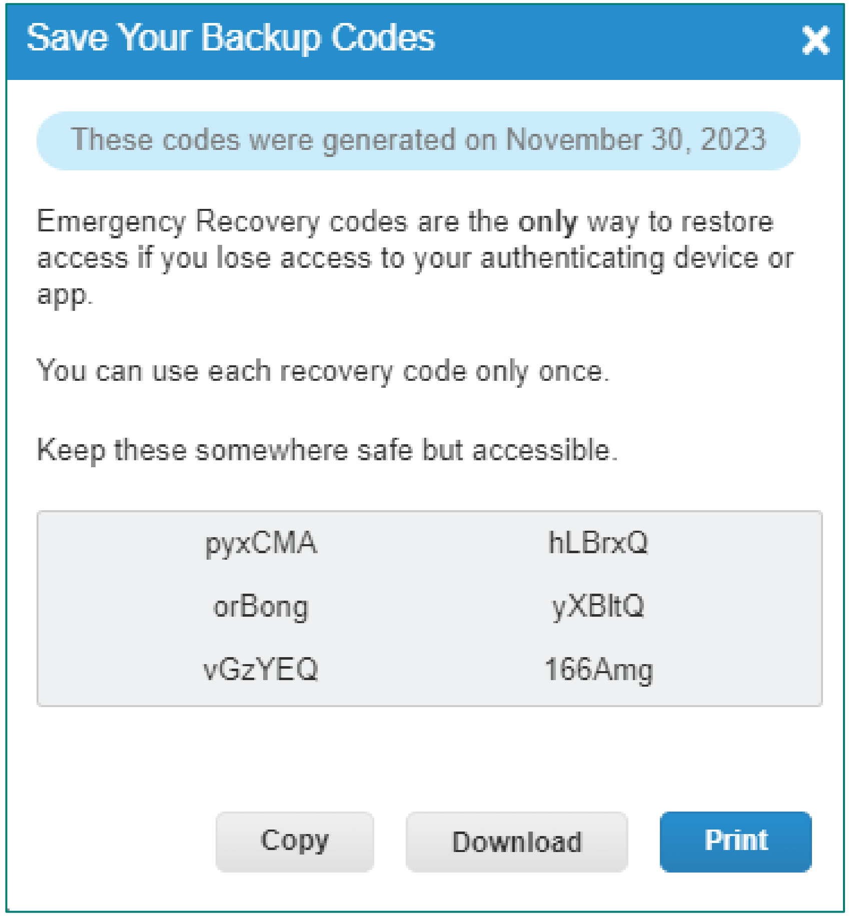


13

Setting up MFA – Recovery Codes

Recovery codes are one-time use and allow the user to skip MFA. These are backup codes only, not to be used as the primary verification method.

- Download or copy codes.
- These codes are a *sample only*.



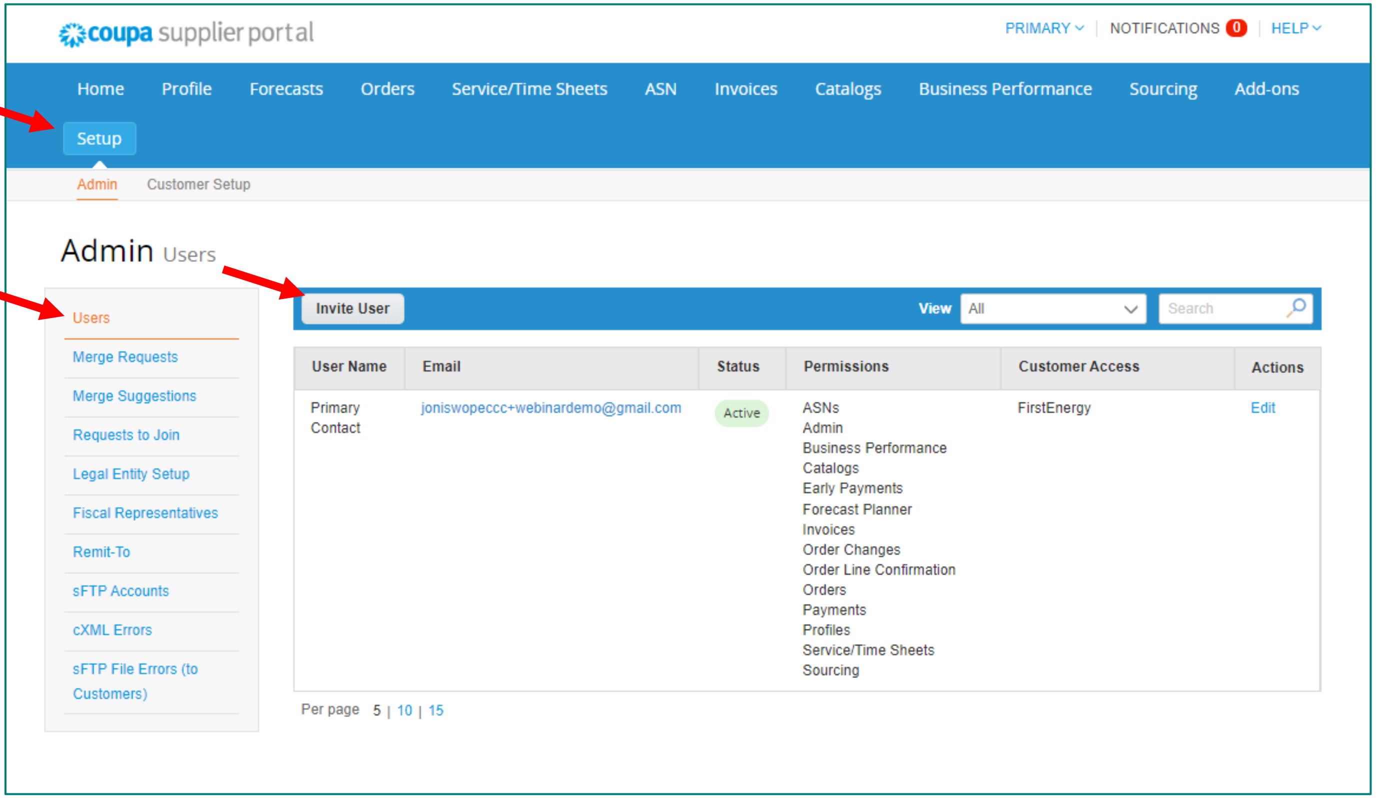
FE FORWARD

14

Managing Additional Users

Suppliers are able to add as many users as needed to support transactions with FirstEnergy or other customers using Coupa. The Admin will need to create new accounts and assign permissions to new users.

- The Admin page provides quick links to user management, legal entity setup, and several other management tools.
- Invite New Users
  - — Click **Setup**.
  - — Click **Users.**
  - — Click **Invite User.**
  - — Complete required information.

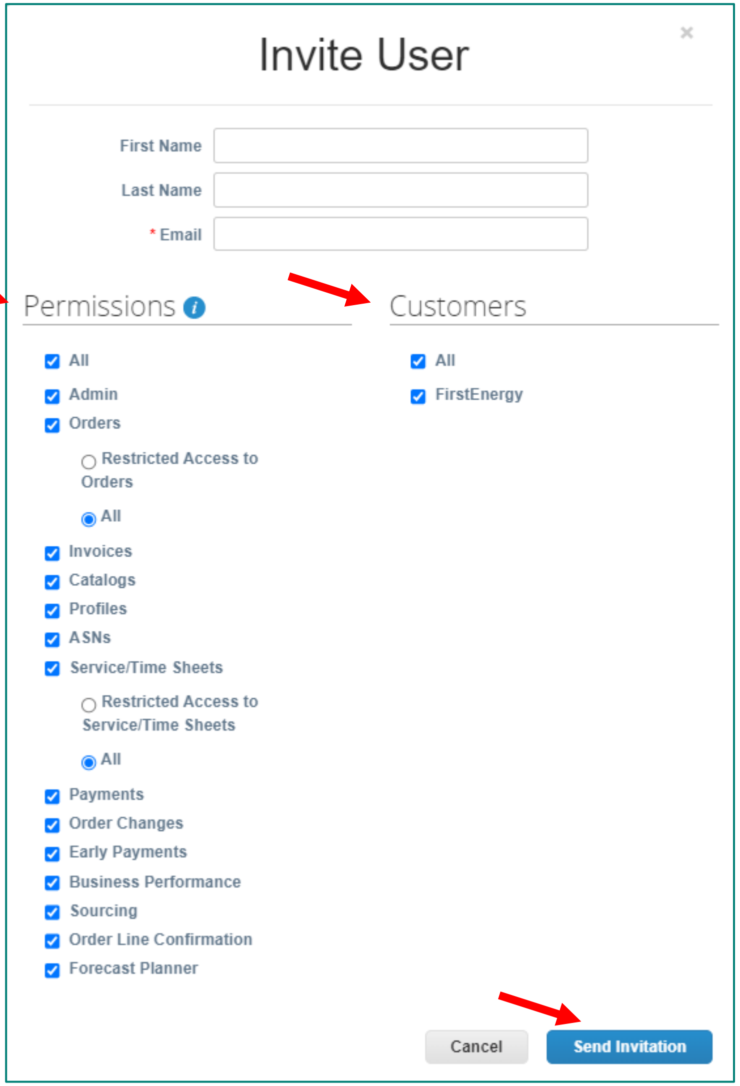


15

Managing Additional Users

Complete the required information.

- First Name, Last Name, and email are required.
- Manage Permissions
  — Only give relevant permissions.
- If the supplier has multiple customers using Coupa, the Admin is able to grant or revoke access to specific customers by checking the box next to the customer's name.
- Finish by clicking **Send Invitation.**
- The invited user will be able to set up their own MFA and manage their own notifications.

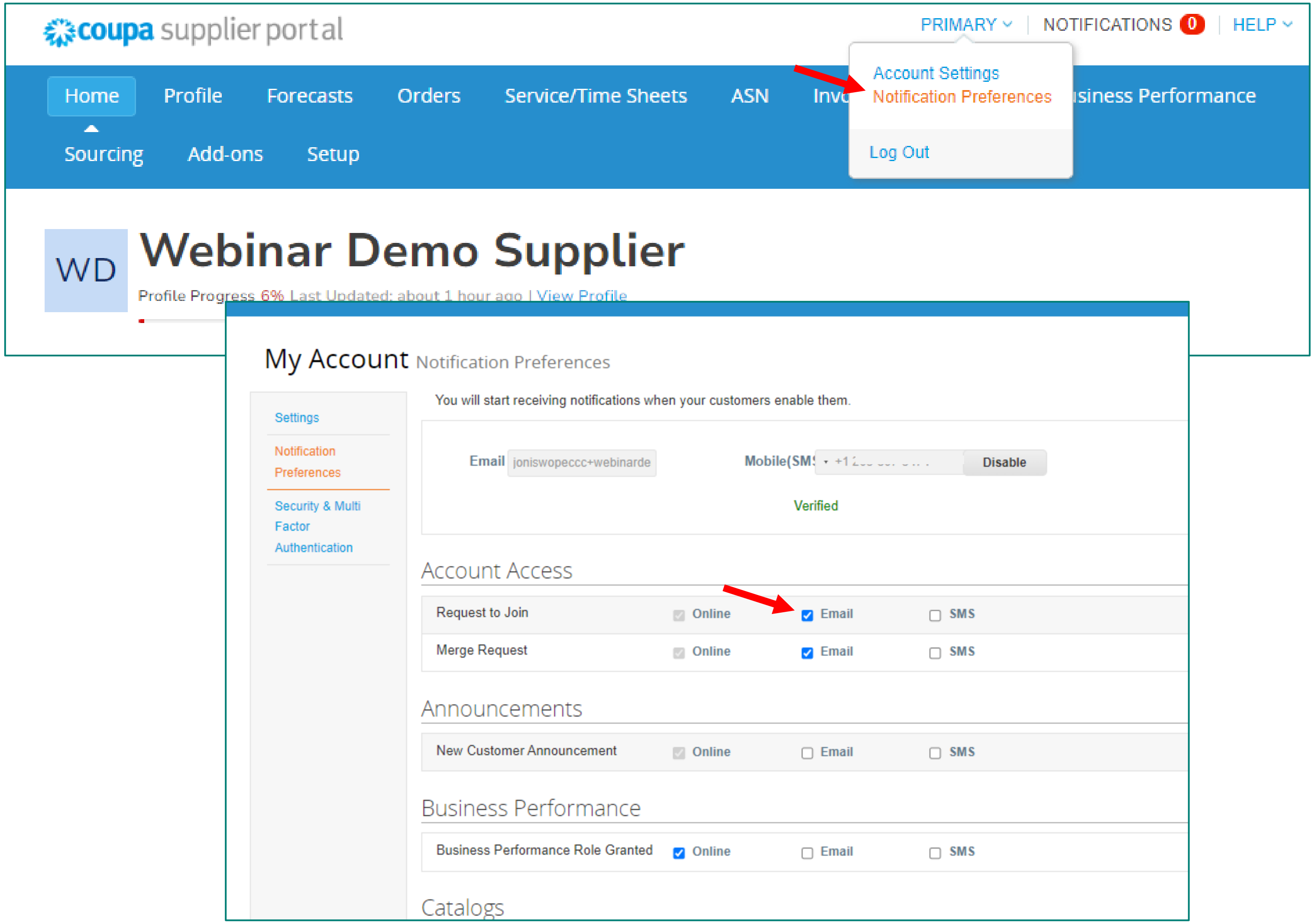


16

Managing Notifications

Each user may manage their own notification settings.

- Notifications are managed by each user individually.
  - Hover over the **Name Menu**
  - Click **Account Settings**
  - Click **Notification Preferences.**
- Each type of notification will be listed.
  - Check or uncheck the boxes as needed.
  - Click **Save** at the bottom of the page

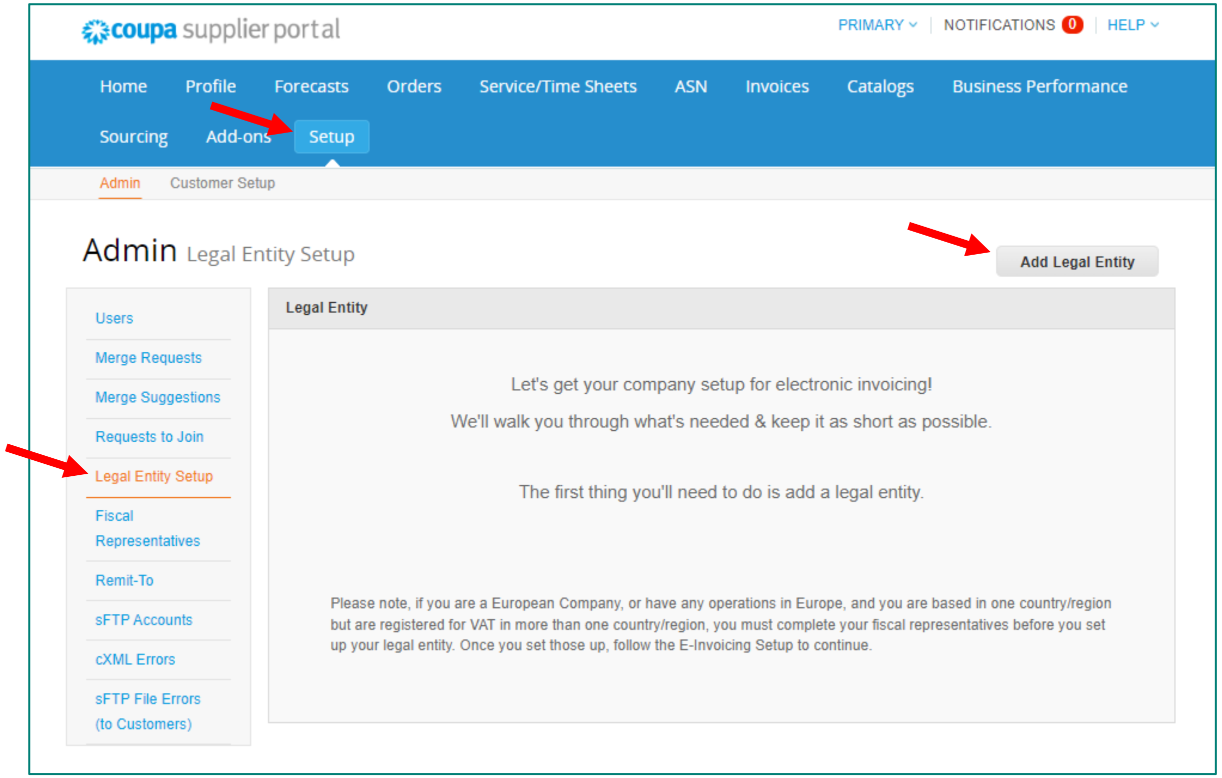


17

Creating Legal Entities

Legal Entities are used to manage payment information and may have one or more Remit-To address and/or Ship From address attached. Legal entity details will automatically populate on invoices once created.

- Legal Entities are best managed through the Setup page.
- Use the Quick Links to access the Legal Entities table.
  - — Suppliers may be prompted to enter the MFA code from either the app or SMS.
- Click **Add Legal Entity**



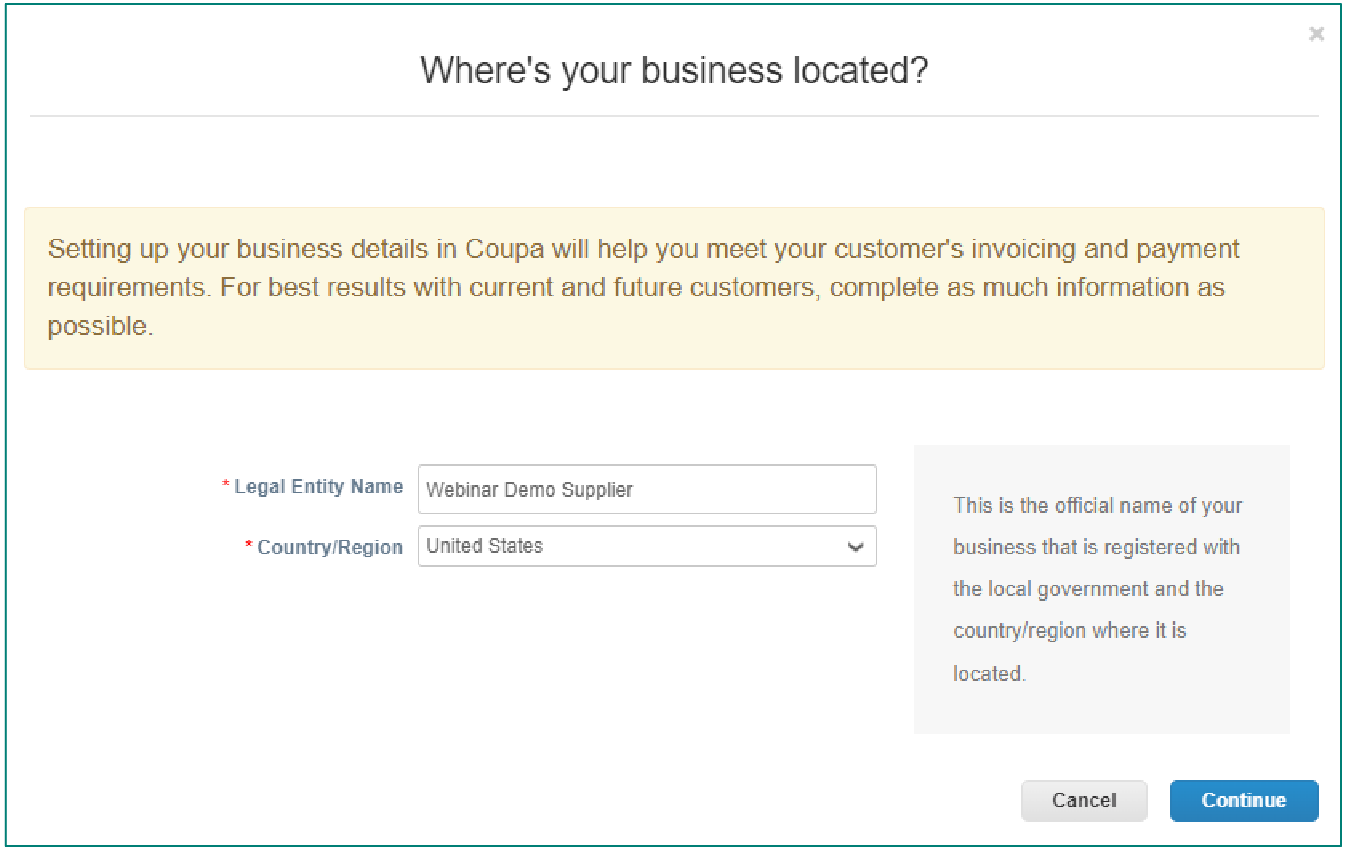
FE FORWARD

18

Creating Legal Entities

Follow the prompts to complete legal entity setup.

- Legal entity name must be the full legal business name, not the DBA (doing business as) name.
- Select Country/Region where the business is registered.
- Click **Continue**

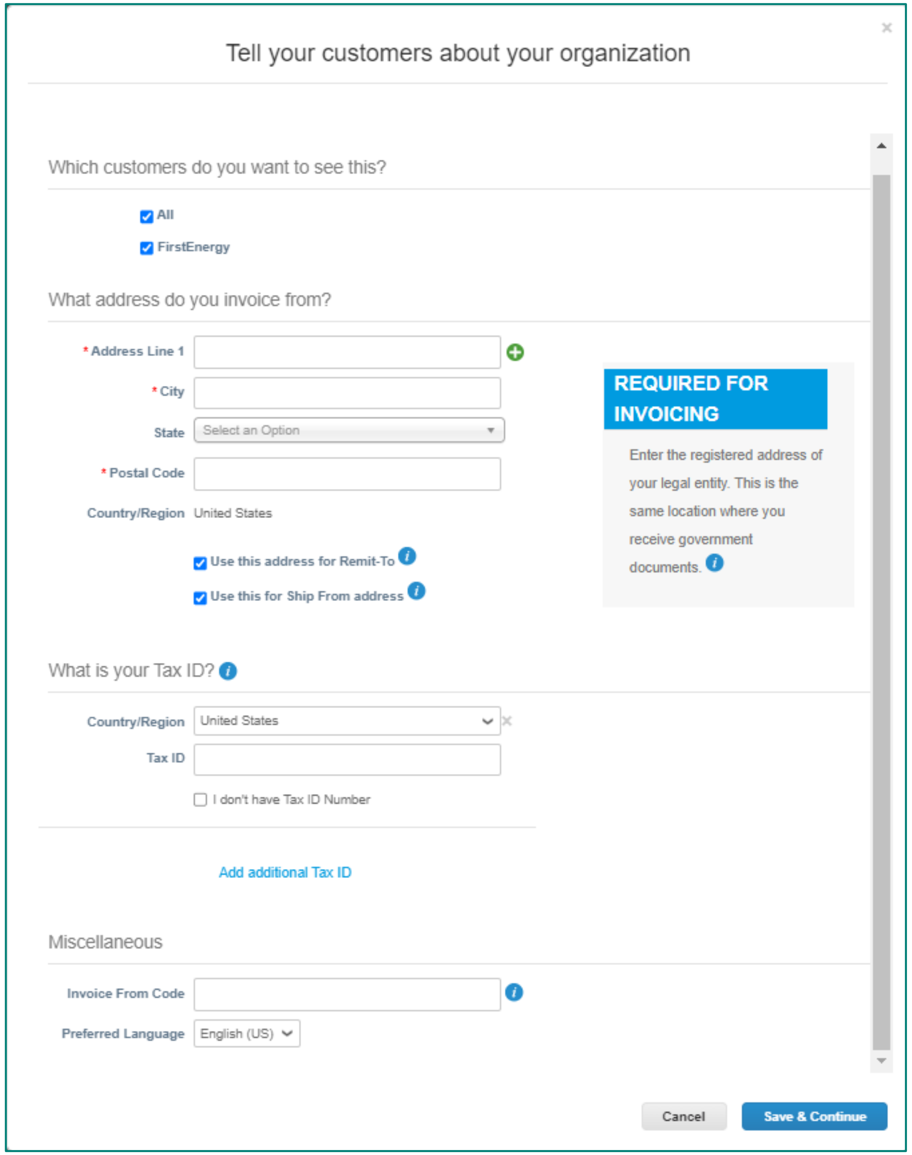


19

Creating Legal Entities

Follow the prompts to complete legal entity setup.
Note: Every blue " i " icon will display a hint or help text.

- Select which customers should have access to this legal entity.
- Complete the Invoice-From address.
- Provide the Tax ID number(s).
- An Invoice From Code is not required.
- Click **Save & Continue**

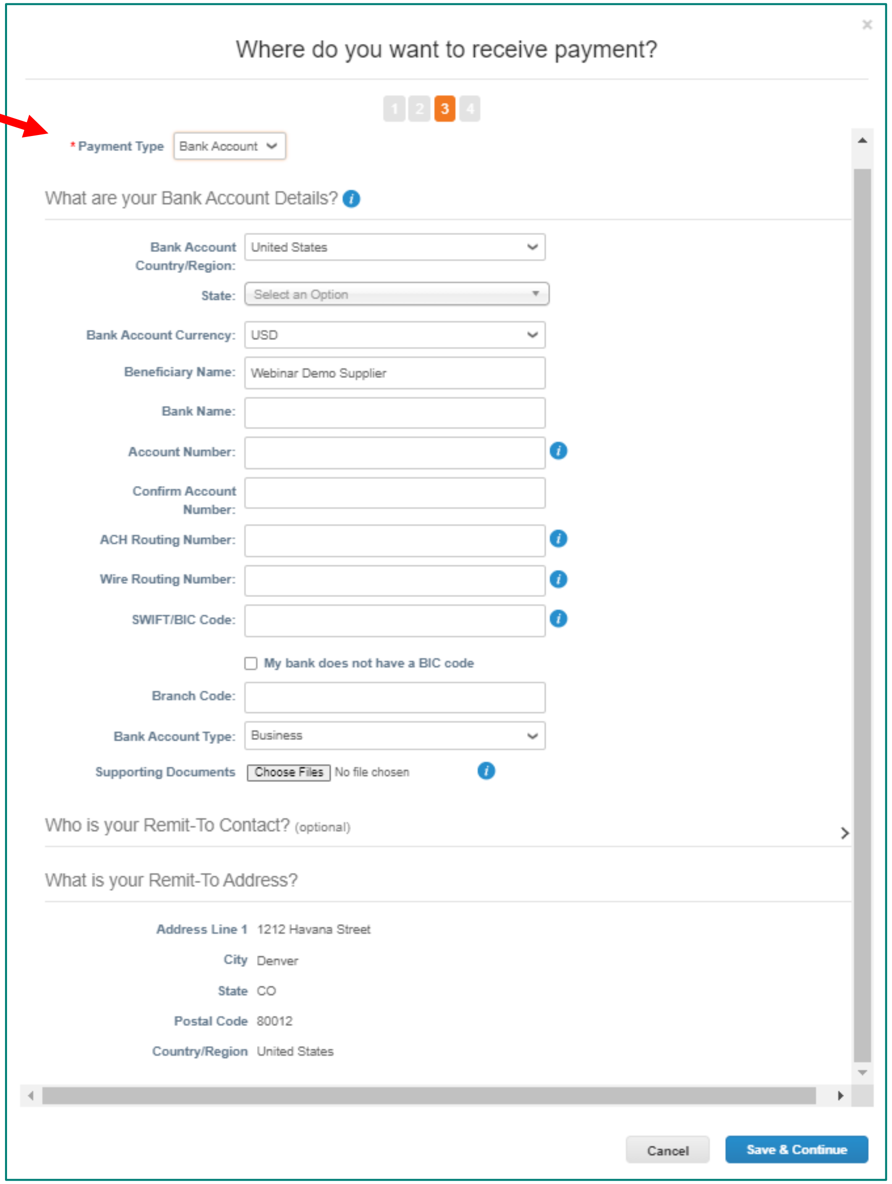


20

Creating Legal Entities

Follow the prompts to complete legal entity setup.
Note: Every blue " i " icon will display a hint or help text.

- Select **Bank Account** from the drop-down menu.
- Complete the required information.
    - — SWIFT/BIC code is required by Coupa and can be found on bank documents or by calling your bank.
- Optional – provide a Remit-To Contact
- Click **Save & Continue**



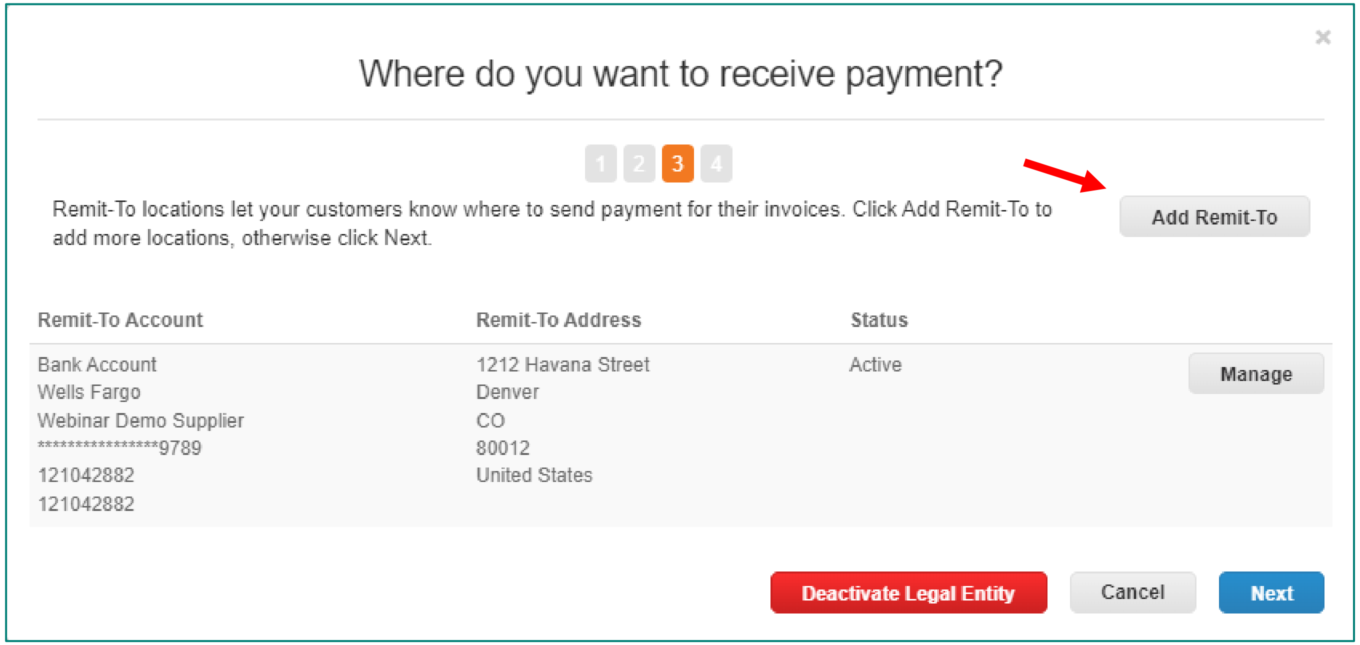
FE FORWARD

21

Creating Legal Entities

Follow the prompts to complete legal entity setup.
Note: Every blue " i " icon will display a hint or help text.

- Provide additional Remit-To addresses as required by clicking **Add Remit-To**.
- If the information is complete, click **Next**.



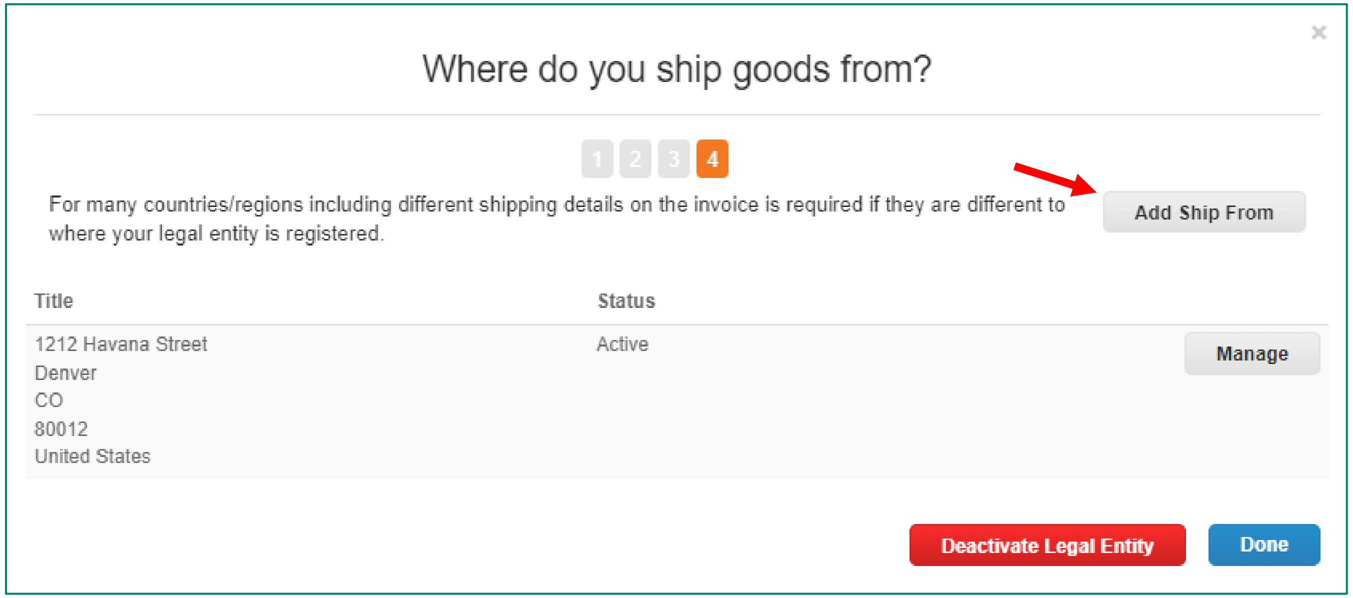
FE FORWARD

22

Creating Legal Entities

Follow the prompts to complete legal entity setup.
Note: Every blue " i " icon will display a hint or help text.

- Provide additional Ship From addresses as required by clicking **Add Ship From**.
- If the information is complete, click **Done**.

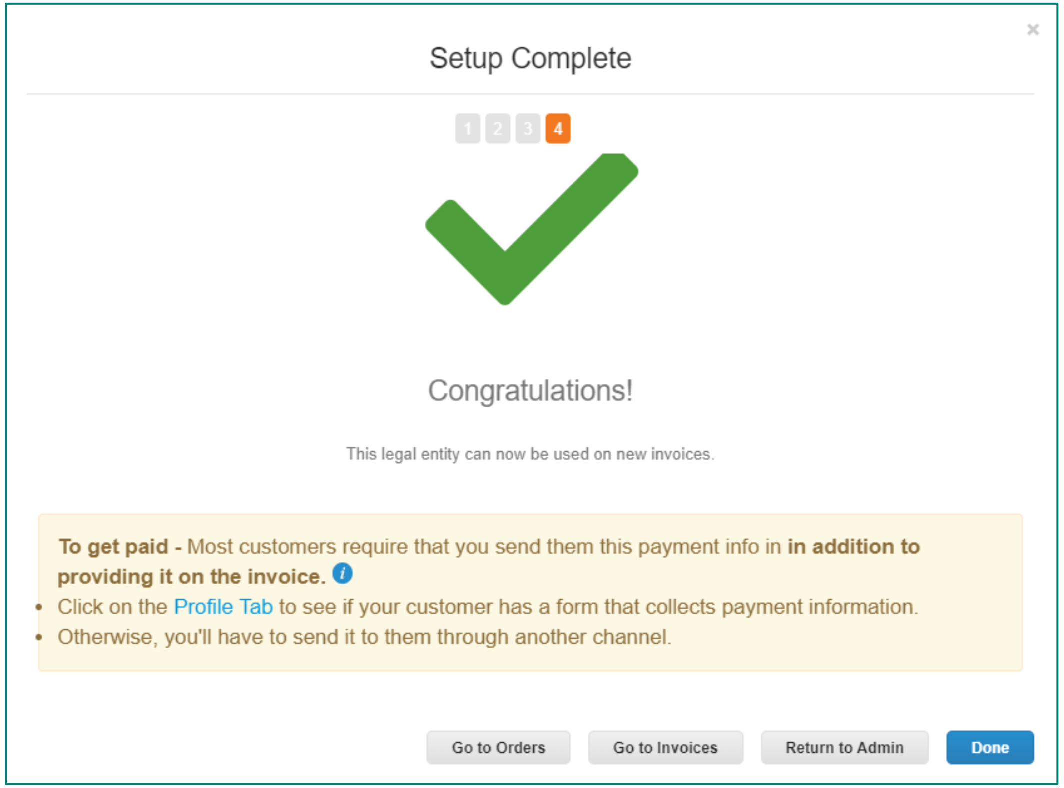


23

Creating Legal Entities

Follow the prompts to complete legal entity setup.
Note: Every blue " i " icon will display a hint or help text.

- Once complete, you will see a confirmation page.
- **Go to Orders** – navigates to Orders page
- **Go to Invoices** – navigates to Invoices page
- **Return to Admin** – navigates to Admin page
- **Done** – goes to the home page



24

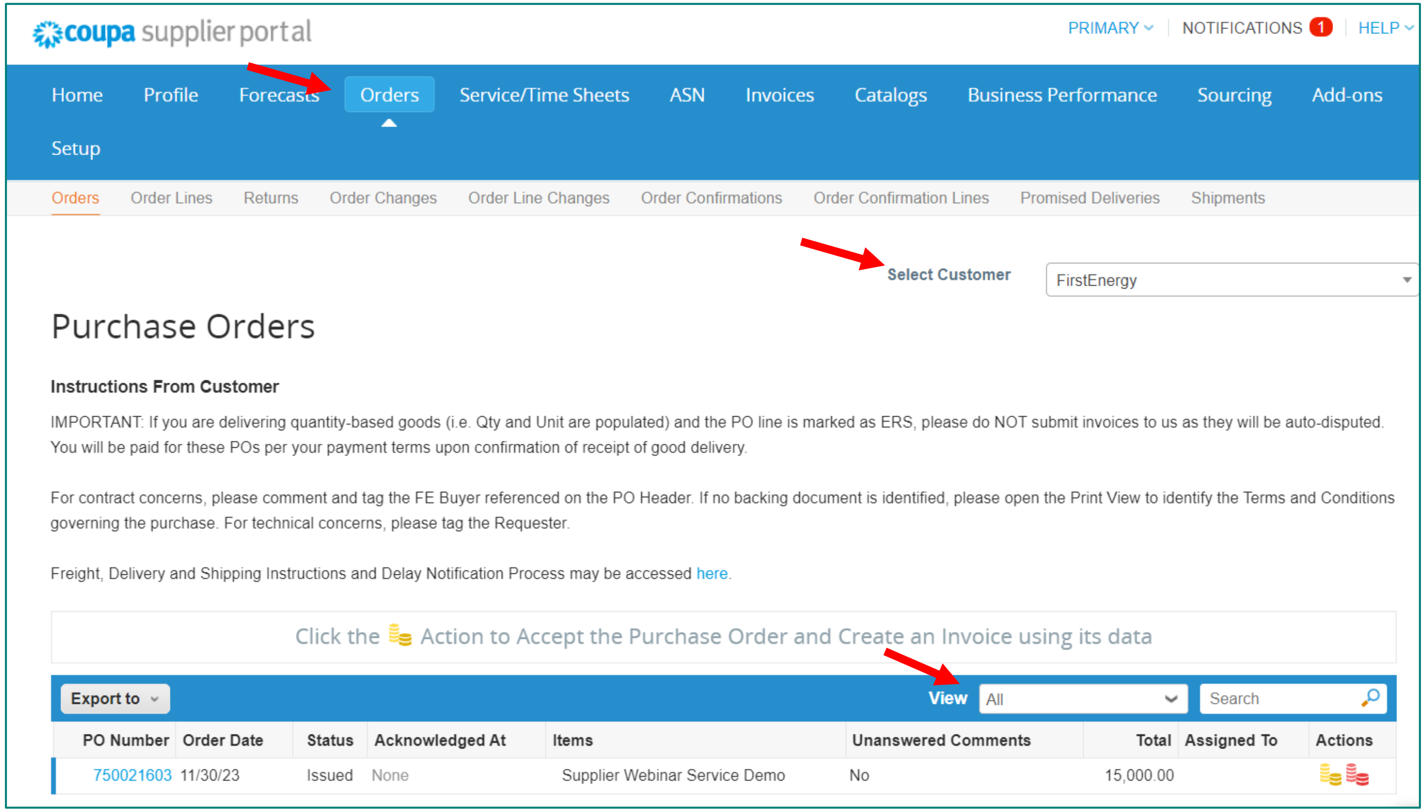
4 – Submitting Invoices

- Finding Orders
- Creating Invoices from POs

Finding Orders

The Orders tab will contain all purchase orders issued to the supplier. Orders will also be emailed to contacts whose notifications are active.

- Toggle between customers using the **Select Customer** drop-down.
- Find Orders in different statuses by changing the **View**
- Use the **Search** to find specific Orders
- Create an invoice against a given Order by clicking the yellow coins.
- Create a credit note against a given Order by clicking the red coins.



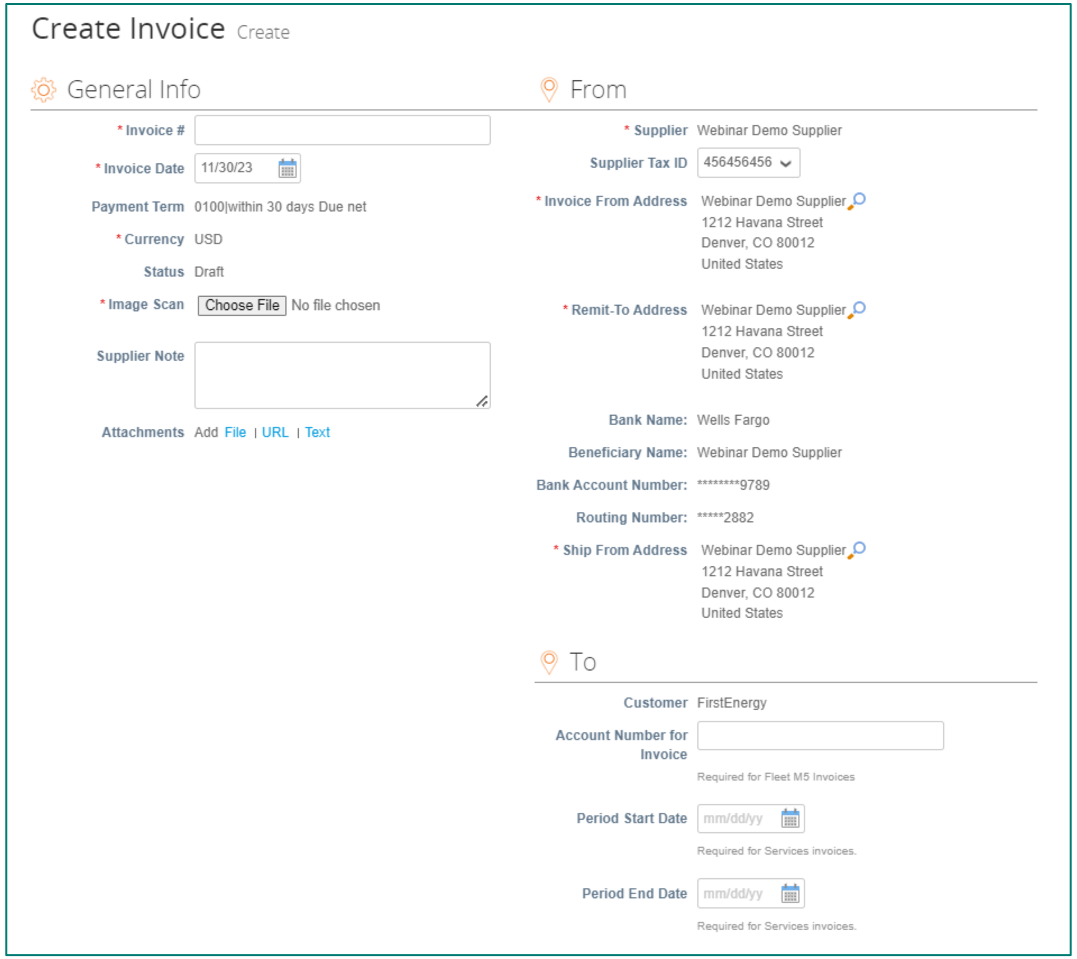
FE FORWARD

26

Creating Invoices against Orders

Clicking the yellow coins ( ) will open a draft invoice against a given Order, whose details will be prepopulated along with the legal entity information.

- Complete the required fields marked with a red asterisk (*)
- Upload a copy of the invoice under **Image Scan**
- Only one attachment may be added under the **Attachments** section.
  - — Combine all documents into one PDF before uploading.
- If more than one legal entity, Remit-To address, or Ship From address is available, select the appropriate data by clicking the magnifying glass icon.
- Account Number is required for Fleet M5 invoices.
- Period Start and End Dates are required for service invoices.



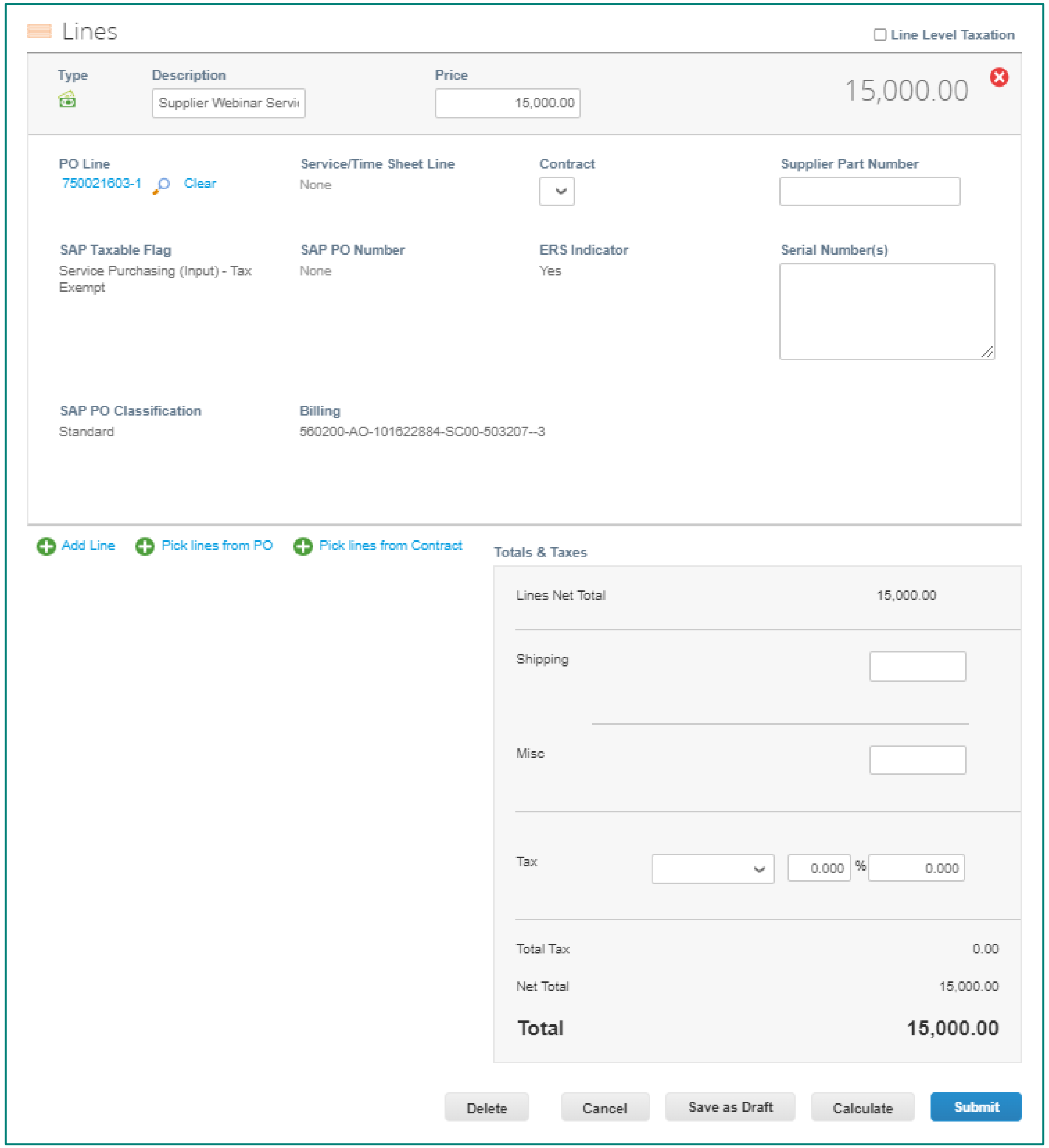
FE FORWARD

27

Creating Invoices against Orders

Additional details are able to be updated at the line and summary levels.

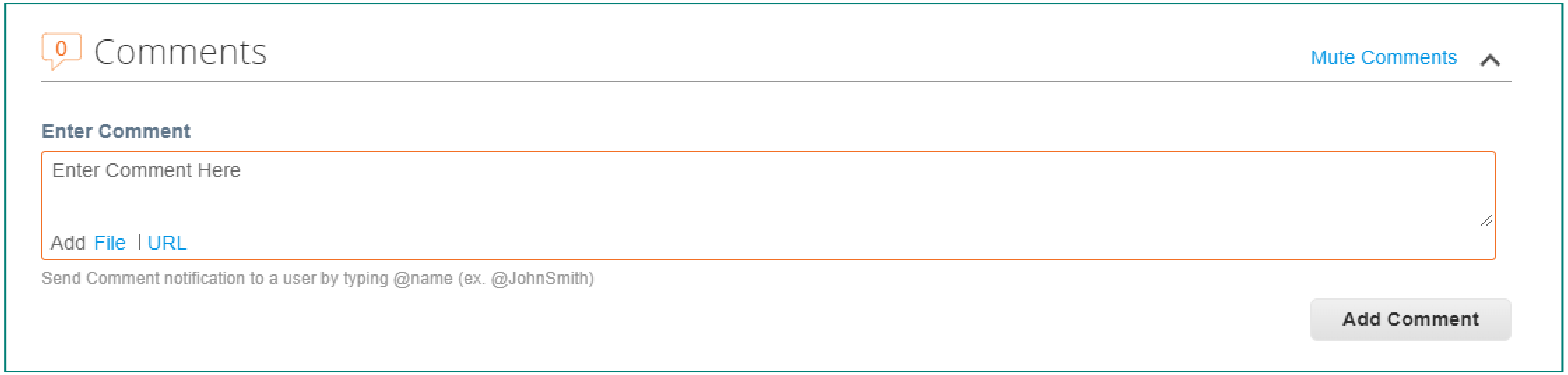
- Complete the required fields marked with a red asterisk (*)
- Lines with type ( ) are service lines. You may edit the price of the line to reflect the services charged.
  - — Note: suppliers who provide goods only are set up as ERS (Evaluated Receipt Settlement), and invoices will be automatically generated on behalf of the supplier.
- Otherwise, update the quantity delivered in order to update the price.
- Please include serial numbers, part numbers, etc, as appropriate.
- Include Shipping, Misc, and Tax charges as appropriate.
- Click **Calculate** to update the Total Tax, Net Total, and Total.
- When finished and sure the information is correct, click **Submit**.



28

Communicating with FirstEnergy via Comments

Each object (invoice or order) in Coupa will have a comment section that can be used to communicate with FirstEnergy about topics specific to that object.



- Enter a comment in the comment box. The **Add Comment** box be clickable once text is entered.
- Tag specific contacts at FirstEnergy (or within your organization) using the @ feature.
- Add files and URLs as needed to support additional documentation.

29

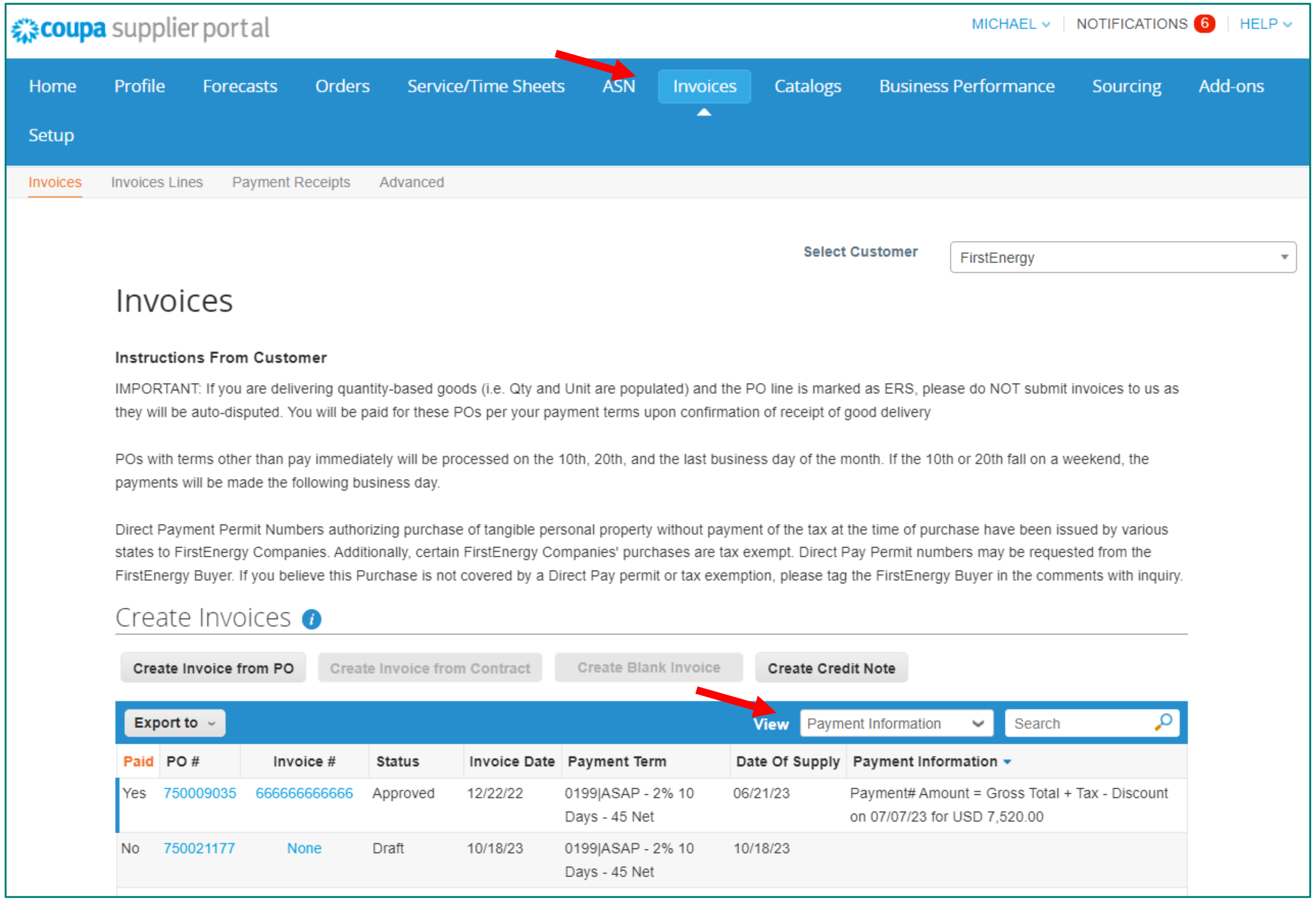
5 – Finding Remittance

- Locating Payment Information
- Creating Custom Views

Finding Payment Information

Coupa provides payment information for paid invoices on the Invoices table.

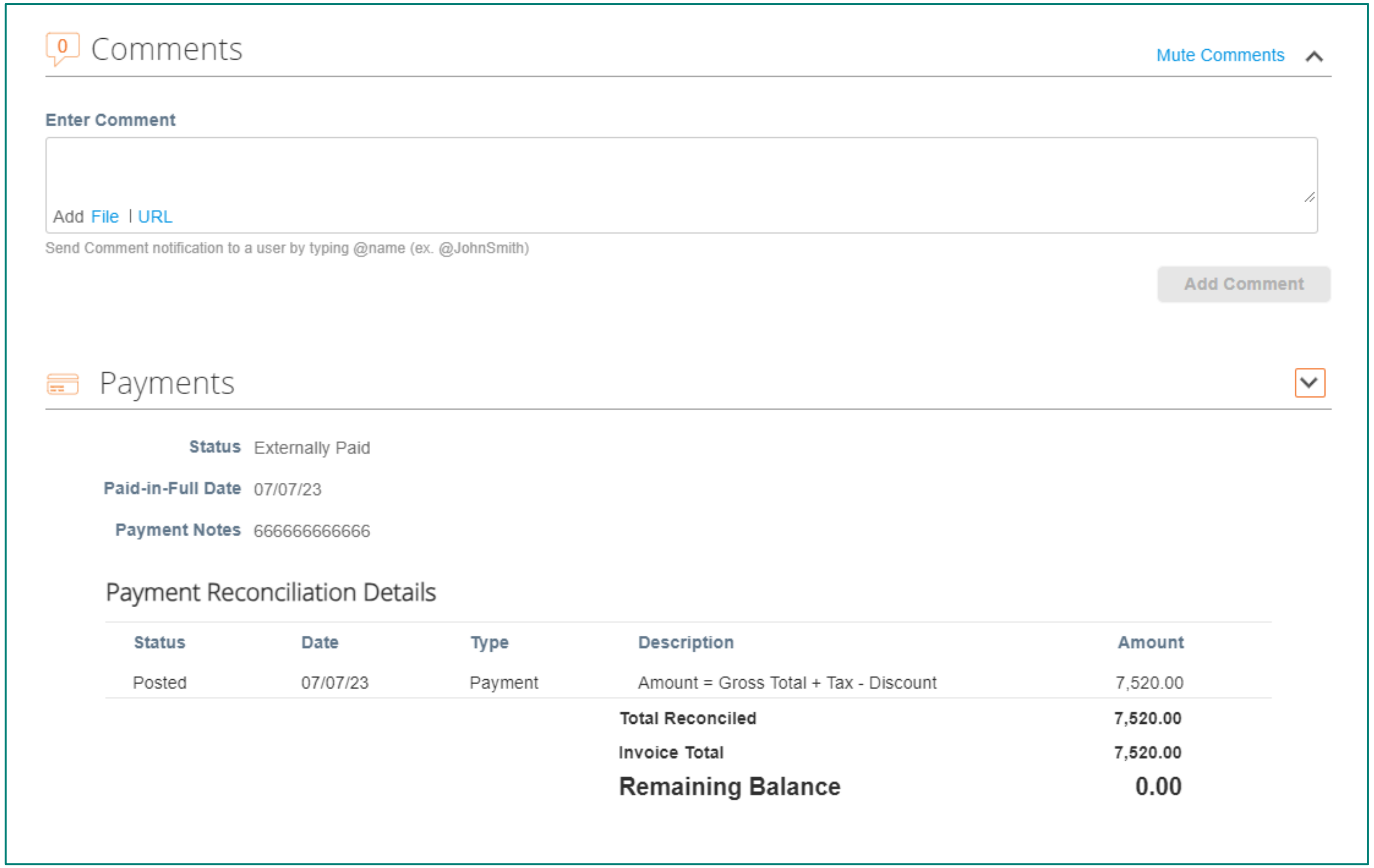
- Click **Invoices**
- Change the View to **Payment Information**
- Use the **Search** to find specific payment details, displayed in the **Payment Information** column
- Click the blue invoice number to view payment information in detail.



31

Finding Payment Information

Payment details will be listed at the bottom of the invoice.



Comments

Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

Payments

Status Externally Paid

Paid-in-Full Date 07/07/23

Payment Notes 666666666666

Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted	07/07/23	Payment	Amount = Gross Total + Tax - Discount	7,520.00
			Total Reconciled	**7,520.00**
			Invoice Total	**7,520.00**
			Remaining Balance	**0.00**

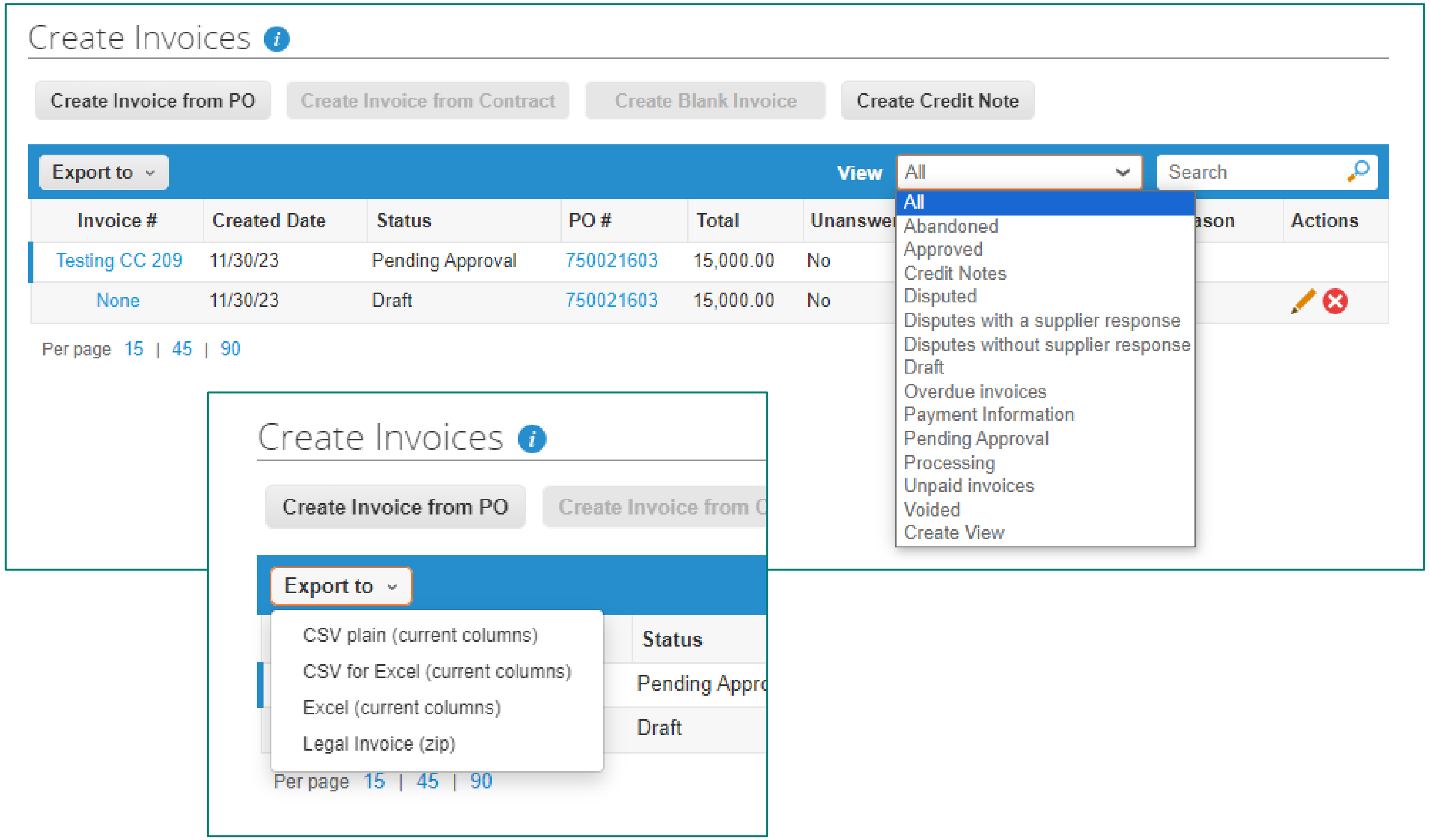
FE FORWARD

32

Creating Custom Views

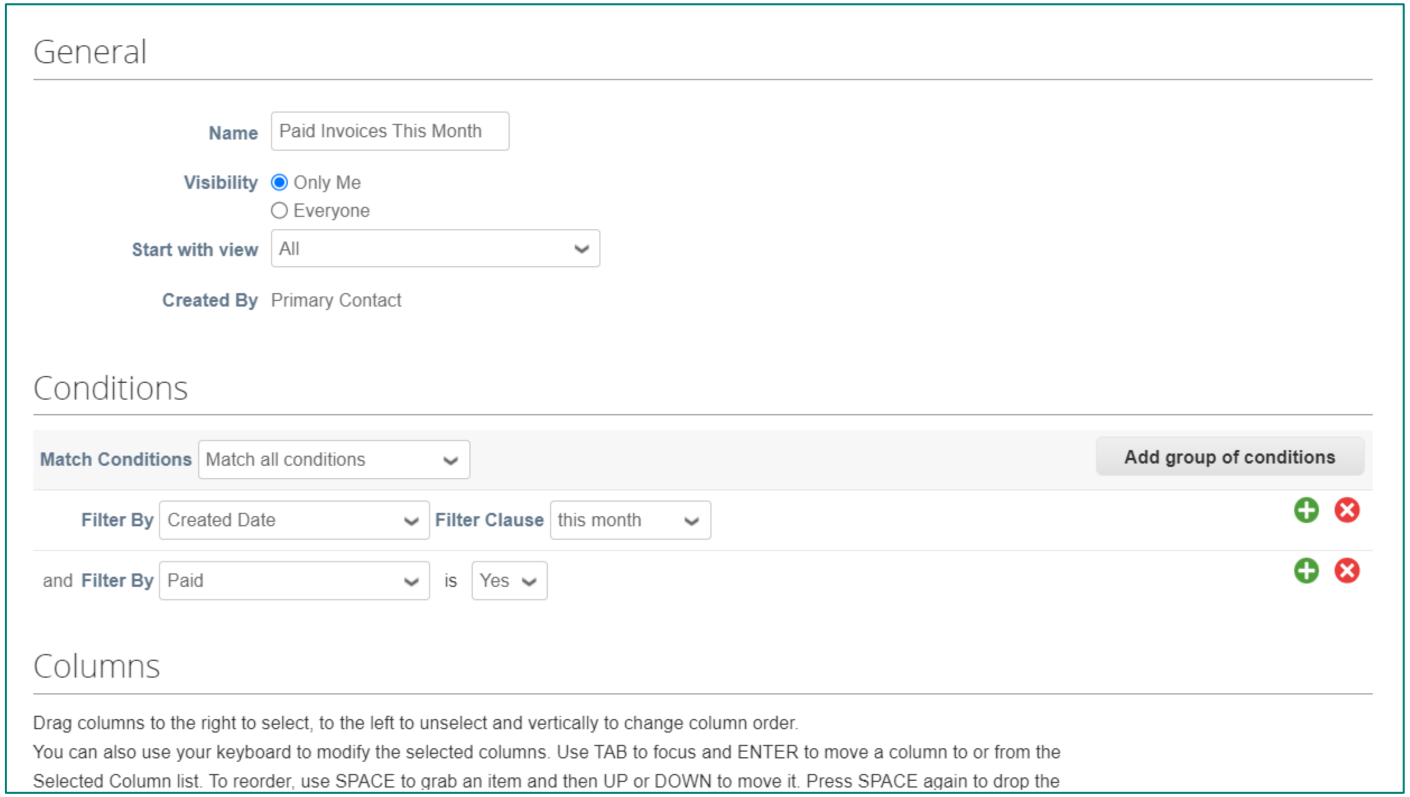
Coupa provides several standard views on each tab (Orders, Invoices, etc.). Users may also create their own views as needed. Any view may be downloaded for offline use in Excel. This example creates a recommended view: Invoices by Month

- Choose from standard views by clicking the dropdown next to **View**
- Export data by clicking **Export to** and choosing a format
- To begin creating a custom view
  - Click the dropdown next to **View**
  - Choose **Create View**
  - A new page will open



Creating Custom Views

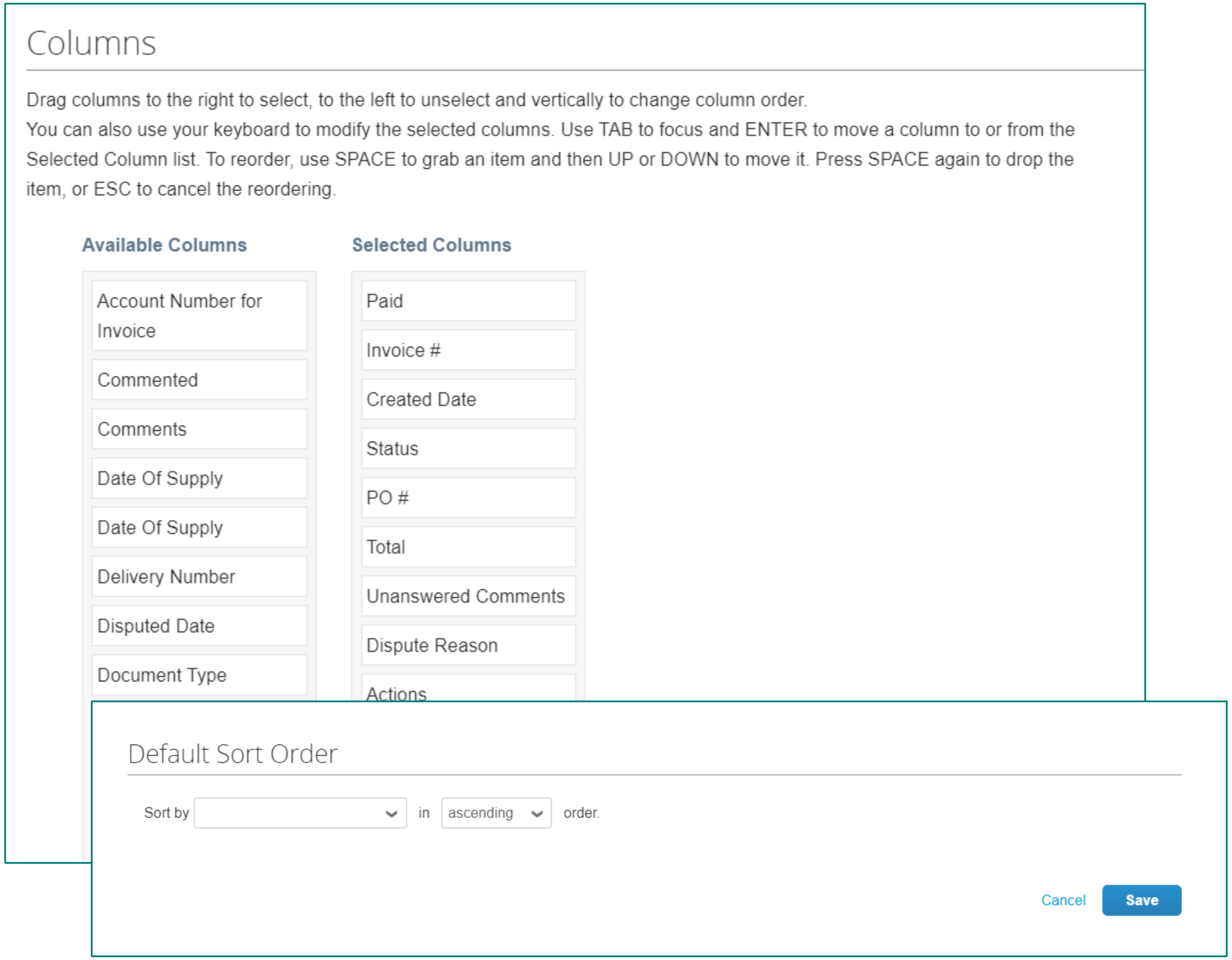
- Choose a name for the view.
  - — This view is called Paid Invoices This Month.
- Visibility can be set to be either private or shared among the users within the same organization.
- Choose a default view to start from.
- Conditions will narrow the results displayed.
  - — Add or remove conditions using the plus ( ) and X ( ) buttons.
  - — Add groups of conditions to increase specificity.
  - — This example uses **Created Date** equal to **this month** and **Paid** is **Yes**.



34

Creating Custom Views

- Each column will have attributes listed that are specific to the type of view to be created (invoices, purchase orders, etc.).
  - The left column will have any available attributes not currently displayed.
  - The right column lists attributes to be displayed.
  - Click and drag attributes from left to right to display them in the finished custom view.
  - The attributes listed top to bottom will be displayed left to right.
  - This example added **Paid** and **Created Date** to the list of attributes to be displayed.
- Choose the default sort order.
- Click **Save** at the bottom of the page to save the custom view.



35