Supplier Reference Guide

Coupa Supplier Portal (CSP)

Content

Introduction and Benefits

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy. Depending on your customer's specific Coupa configuration, you can manage content and settings on a customer-by-customer basis, including:

•Receive and view purchase orders

•Send advance ship notices (ASNs)

•Create, view, and send invoices

•Create and manage customer-specific electronic catalogs

•Manage your public and customer-specific company profiles and remit-to information

•Check the status of transactions and payments with your customers

Register for the CSP

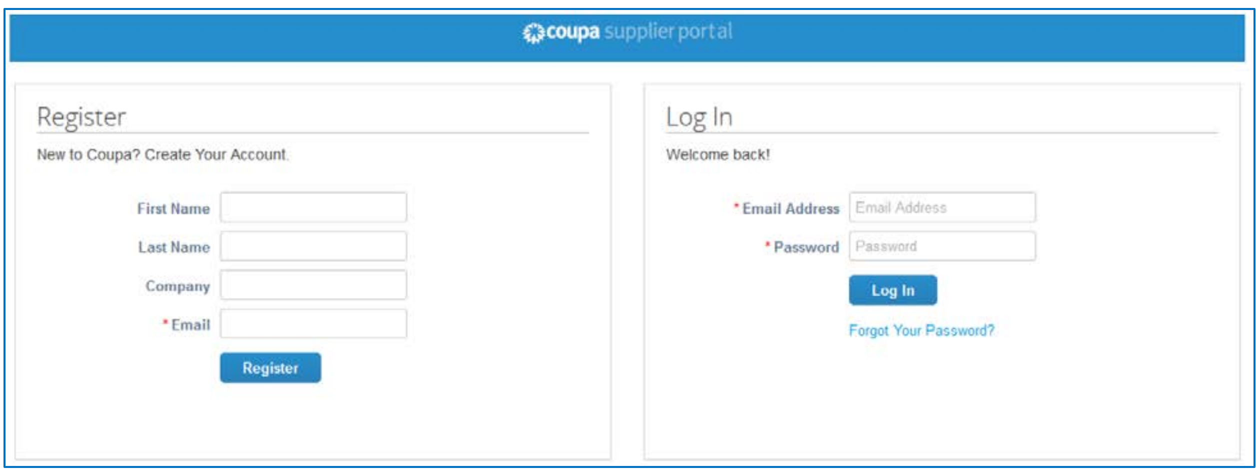
You have the following options by which to register for the CSP:

Customer-Created Invitation

Farmers Insurance first sent the first Supplier Portal invitations in late June 2019. When you accept the invitation and create your account, you are automatically connected and linked to the customer who invited you.

Self-Created Invitation

By proceeding with the self-created invitation, you can get started right away. You will need to connect manually by going to supplier.coupahost.com and in the Register pane on the left, fill in the mandatory email field (marked with an asterisk), and then click Register to request an invitation. By self-registering, you will need to email Farmers Insurance at farmers.supplier.comms@farmersinsurance.com to provide your email account for registration.



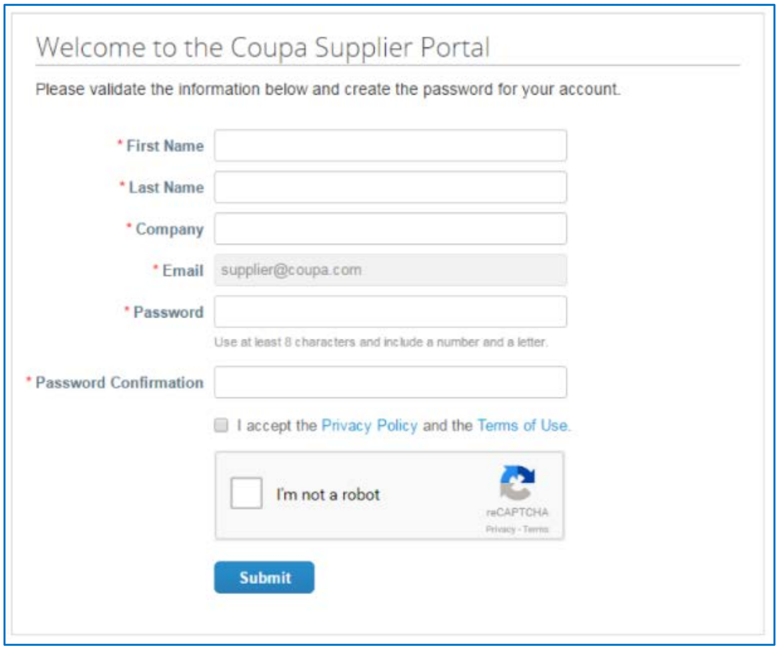
With both methods, you need access to the email address you are going to use for the account. Your CSP account is based on a specific email address. If you use an email address different than the one your Coupa customers have on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

In both cases, you will receive an email with a link to validate your information and create your account.

NOTE: If you don't receive you invitation email, check your spam folder or email Farmers Insurance at [farmers.supplier.comms@farmersinsurance.com.](mailto:farmers.supplier.comms@farmersinsurance.com)

My Account Management

After following the link from the Coupa invitation email sent from Farmers Insurance, fill in the mandatory fields to provide basic information for your account and your company's public profile.

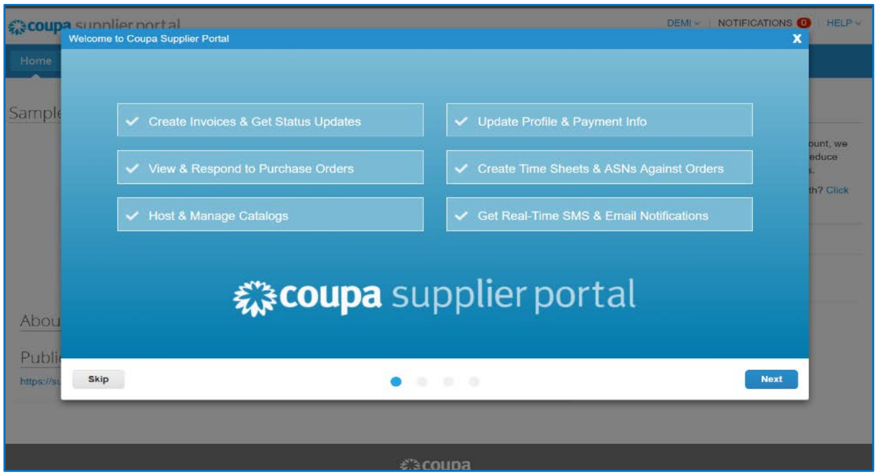


Setting	Description
*First Name	Your personal first name to be applied to your personal account.
*Last Name	Your personal last name to be applied to your personal account.
*Company	The name of your company as seen on your company's public profile.
*Email	This field can't be changed. If you want to change your email address, you have to create a different CSP account using the new email address. If you also want to use this email, create two company accounts and merge them. For more info, see Managing Merge Requests.
*Password	Use this field to create your password. It must be at least 8 characters long, and it has to include a number and a letter.

To create a CSP account, you must also accept the Privacy Policy and the Terms of Use.

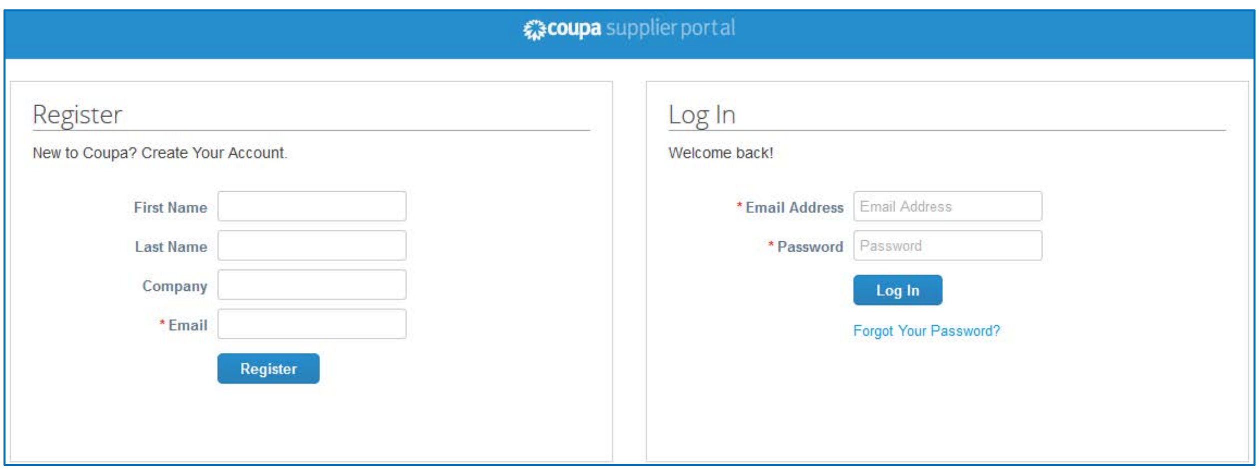
By default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration.

Once you are signed in, Coupa takes you on a tour of the new site.



Logging in to the CSP

Go to https://supplier.coupahost.com/ and in the Log In pane on the right, enter your email address and password and click Log In. When you log in for the first time, you are prompted to enable two-factor authentication.



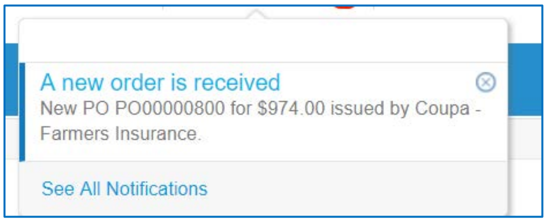
Logging in with Two-Factor Authentication

Open Google Authenticator on your device and choose your CSP account. Enter the number that is shown. Type the two-factor authentication code in the appropriate field, choose “Remember this computer for 30 days” if you’re not using a shared or public computer, and click Log In.

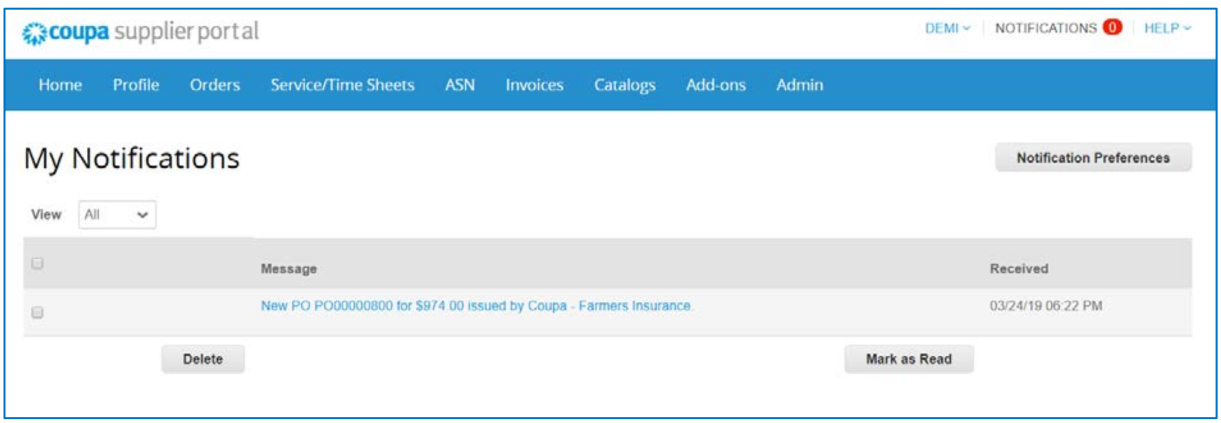
NOTE: The code that Google Authenticator provides is good only for 60 seconds. If you don’t type that code on the CSP sign-in page and click Log In within 60 seconds, you have to get a new code and try again. If you are locked out and you don’t have your six-digit backup validation code, contact Coupa Support by emailing supplier@coupa.com.

Notifications

In the top right of your window, hover over the Notifications link to see your unread system notifications.

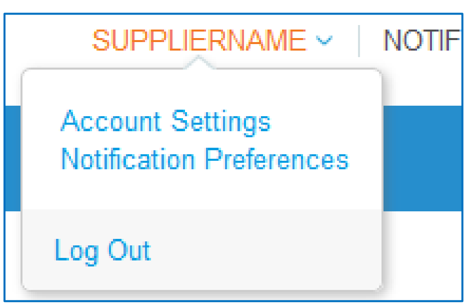


To view details of your notifications and manage them, click on the Notifications link.



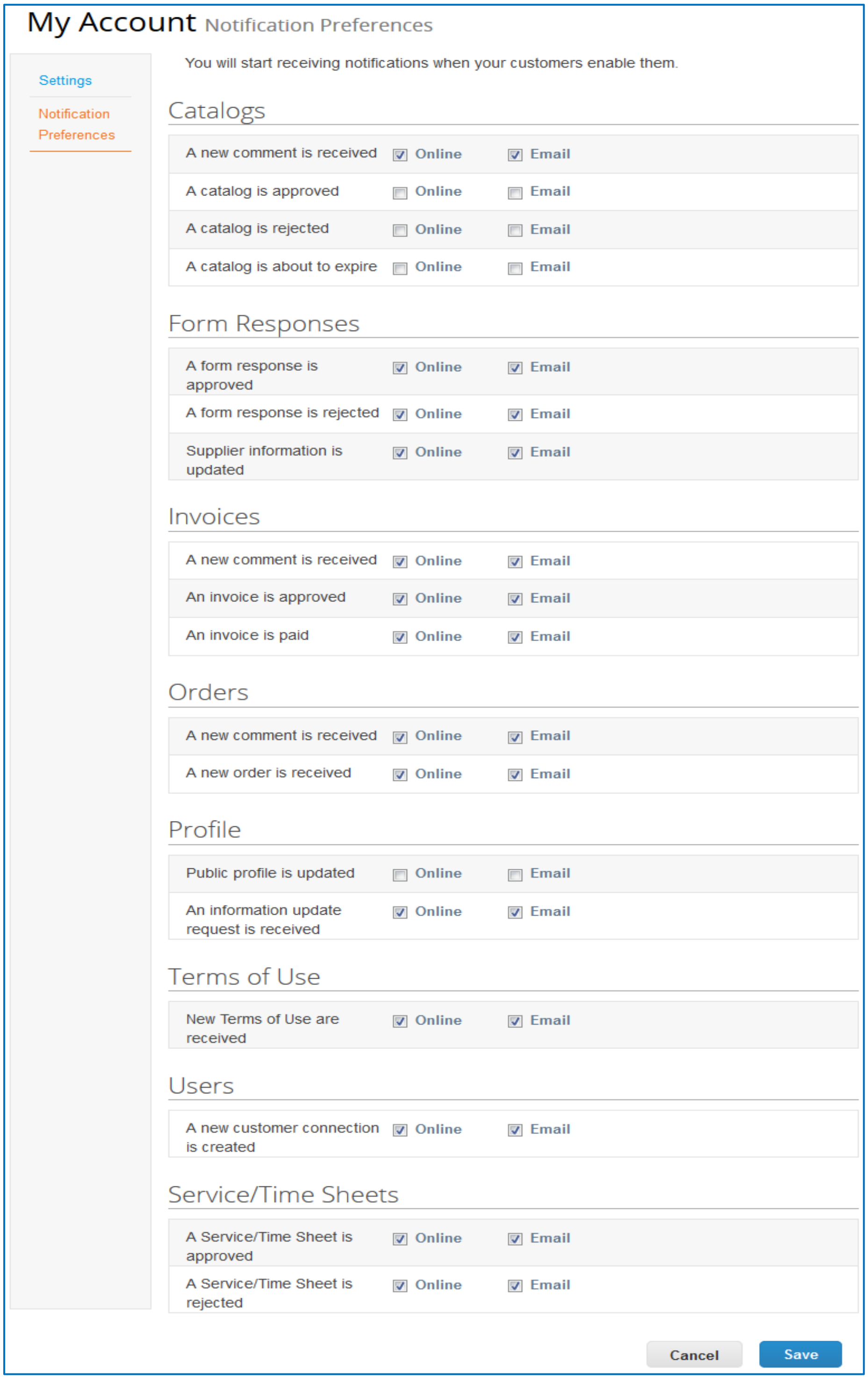
On the My Notifications page, you can view all of your (read and unread) notifications, or you can filter by category (FYI, To Do, or Unread). You can select and delete them all or one-by-one.

To change your notification preferences, hover over your name in the top right and click on the Notification Preferences button. When you begin your introduction to Coupa, it is recommended that you enable all of your notifications until you are fully familiar with the system.



On the My Account Notification Preferences page, select the radio buttons for the items that you want to receive any or all of the notification types: online (to do list) or email.

NOTE: If you have an SMS-capable device and you validate your phone number, you can also choose to receive notifications as short text messages via SMS text.



My Account Notification Preferences

Settings

Notification Preferences

You will start receiving notifications when your customers enable them.

Catalogs

A new comment is received	[x] Online	[x] Email
A catalog is approved	[ ] Online	[ ] Email
A catalog is rejected	[ ] Online	[ ] Email
A catalog is about to expire	[ ] Online	[ ] Email

Form Responses

A form response is approved	[x] Online	[x] Email
A form response is rejected	[x] Online	[x] Email
Supplier information is updated	[x] Online	[x] Email

Invoices

A new comment is received	[x] Online	[x] Email
An invoice is approved	[x] Online	[x] Email
An invoice is paid	[x] Online	[x] Email

Orders

A new comment is received	[x] Online	[x] Email
A new order is received	[x] Online	[x] Email

Profile

Public profile is updated	[ ] Online	[ ] Email
An information update request is received	[x] Online	[x] Email

Terms of Use

New Terms of Use are received	[x] Online	[x] Email

Users

A new customer connection is created	[x] Online	[x] Email

Service/Time Sheets

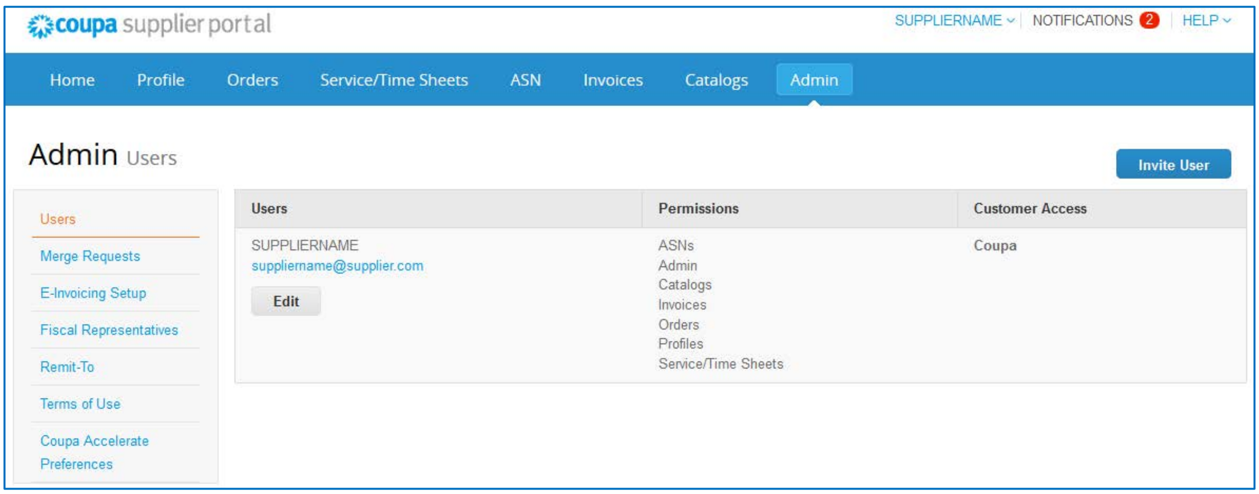
A Service/Time Sheet is approved	[x] Online	[x] Email
A Service/Time Sheet is rejected	[x] Online	[x] Email

Cancel Save

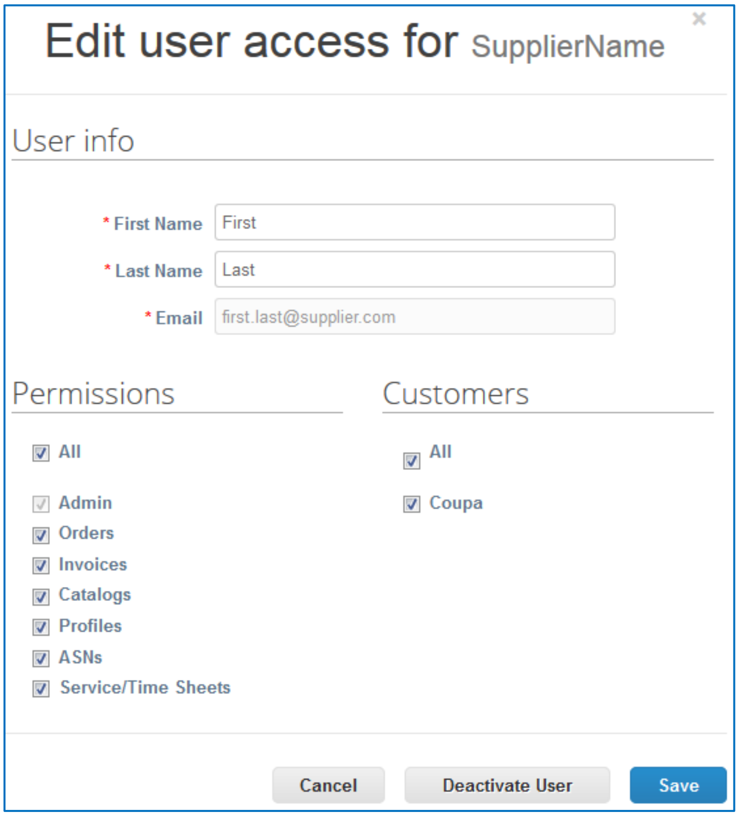
Users

From the Admin tab in the top ribbon of your window, you can manage user permissions and Farmers Insurance access by assigning certain users to certain customers, by limiting what types of documents they can access, and selecting which functions they can perform with their assigned customers.

From the top ribbon, find the Admin tab and then select the Users section on the left of your screen. The Admin Users page appears after clicking this option.



Click on the Edit button to open the Edit user access for [User Name] window.



You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

You cannot change the user's email address. If a user wants to change the email address, you must send a new invitation to that user. To invite a new user, find the Invite User icon in the top right corner of the User page. It is recommended to set up at least two contacts as account Admins in the event of an absence or departure.

The Invite user and Edit user access for [User Name] windows are almost identical, but when you invite a user, you can specify an email address.

Permissions	Description
All	Gives full access to all CSP functions, except for user administration.
Admin	Has full access to all CSP functions, including user administration. Non-admin users can still view the **Users** tab of the **Admin** page and invite users, but they can't edit existing users. The permissions on the invitation can't exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. ***Note:*** *All users, regardless of permissions, can edit the public profile.*
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.

Coupa doesn't allow users to be deleted, so no one can be deleted from your company profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

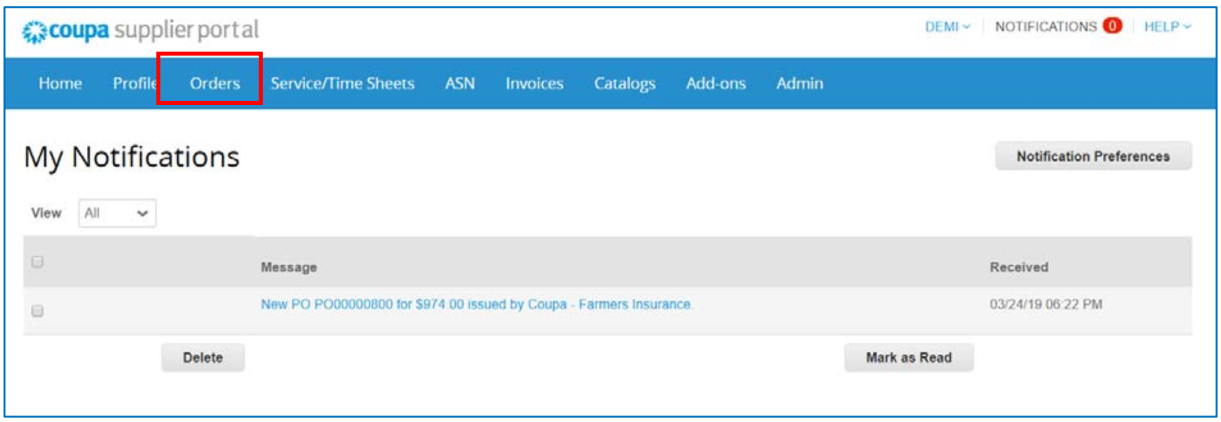
If you deactivate users, you can always reactivate them later. If you reactivate a user, the customer access is reset for that user, so you will have to assign customers to that user again.

Viewing Purchase Orders and Invoices

Purchase Orders

Purchase Order Tab

To begin managing Purchase Orders, click the Purchase Orders tab. Each purchase order will be given an individual number when created in Coupa. By clicking on the PO number, the details of the PO will be displayed.



It is important that you acknowledge the PO by clicking the Acknowledged box. Click the drop down and select the relevant status. Then, click the calendar and select the relevant date. The bottom section of the PO will display line by line the requested items.

Email Notification of PO

When a purchase order is submitted to you, you will receive an email notification and an in-system notification. It is important to note that your customer keeps both a Contact Email (to which the CSP Invitation is sent) and a separate PO Email (to which all orders are sent). These can be the same account.

NOTE: You will need to log on to the CSP and acknowledge receipt.

PO Delivery Tab

You have the option to change the email address the Purchase Order is sent to by clicking on PO Delivery. Enter the new email address in ‘PO email’ field.

Invoices

By clicking on the Invoice tab from the main page on the CSP, you will be able to view all of your invoices, the status of each, attachments and comments on each, and the payment information for each invoice.

"PO Flip" Functionality - Flipping a Purchase Order (PO) to Create an Invoice

You are able to flip your PO order into an invoice. Flipping the PO into an invoice transfers all the PO line information on to an invoice. To flip the purchase order to an invoice, click on the gold coin stack. The invoice screen will be displayed.

To complete the invoice follow the steps below:

Step 1: Create an invoice number

NOTE: When you create each invoice you will be asked to create an invoice number. Note that the same number cannot be used twice and that the number cannot exceed 16 characters.

Step 2: Enter the invoice date

Step 3: Upload a scanned image into the Image Scan field

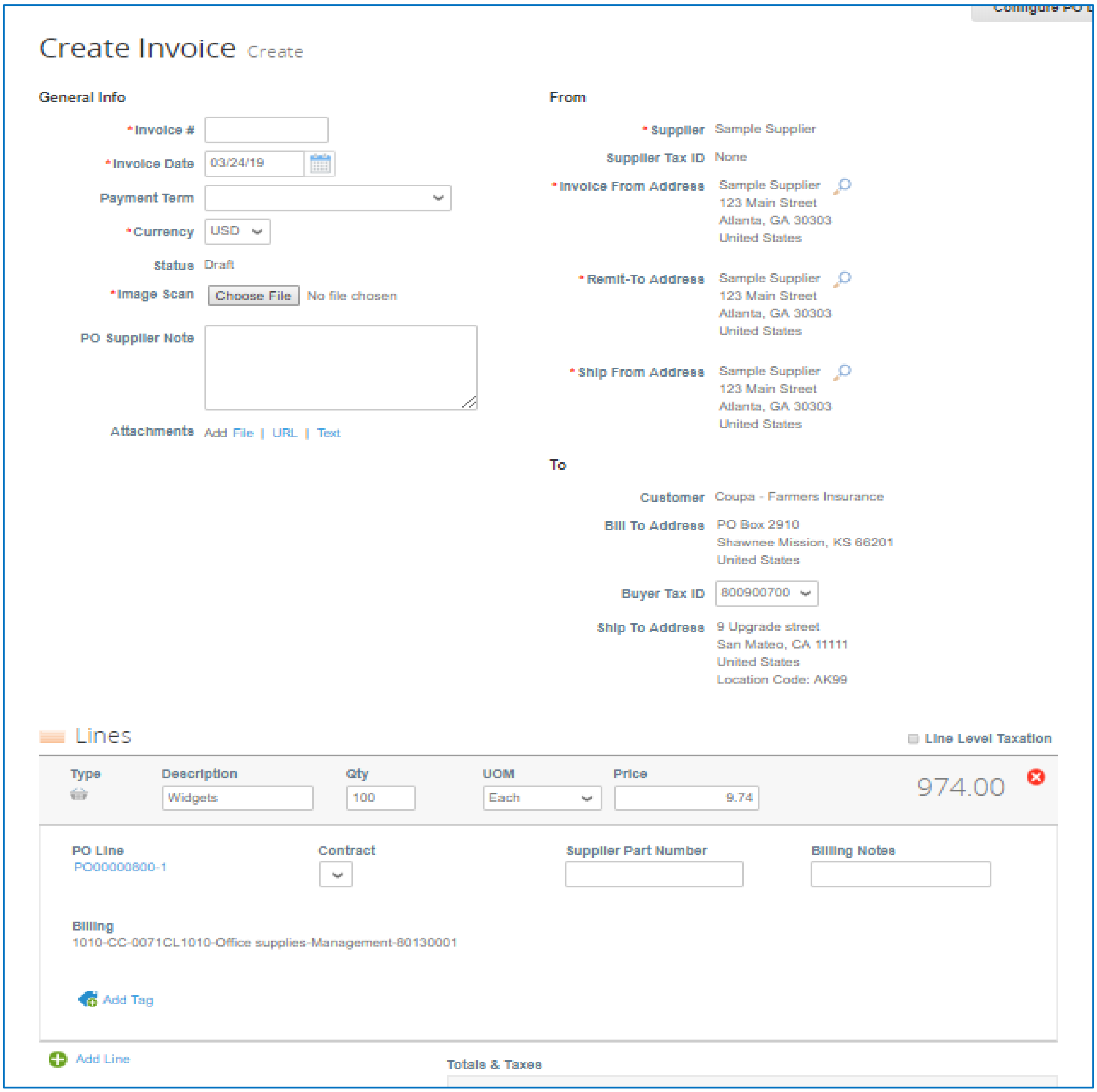
Step 4: Invoice the amount to be paid by amending the quantity (if applicable)

Step 5: Enter the good or service value (if applicable)

Step 6: When there are several PO lines, some may have already been invoiced. Please do not include these again as they will need to be deleted. Once all the information has been completed please click Submit.

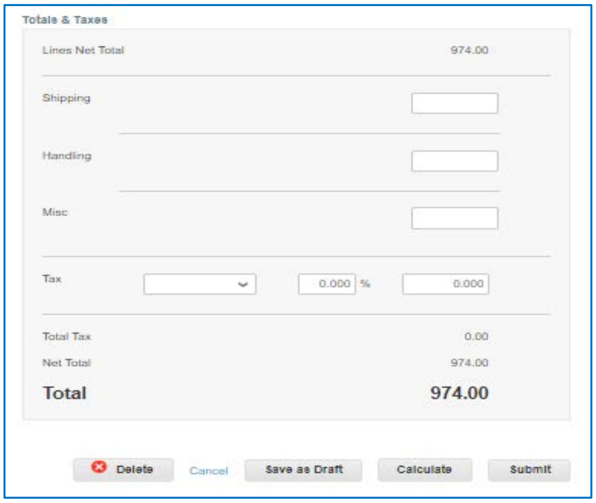
NOTE: The invoice may be sent for approvals before it can be paid.

On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk). You have to select an invoice from, a remit-to, and a ship from address by clicking on the icon next to the address field.



In the Subtotal section, you can enter values shipping, handling, and miscellaneous costs.

Applicable tax rates are determined by the tax rate on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale. It applies to all commodities sold in a specified geographical area.



Clicking Calculate will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the Add Line link or the Add icon next to it.

Submit the invoice or save it as a draft to submit it later. You can also add comments for your customer. Before submitting the invoice, you can cancel or delete it. You can delete only Draft invoices.

To edit a Draft status invoice, do one of the following:

- Click on the Edit icon for the invoice in the Invoices table.
- Click on the Invoice # link to open the invoice and click on the Edit button.

NOTE: If you want to make changes to the invoice after submitting it, you have to must contact your customer directly.

Credit Notes

Similar to creating an invoice, you can create a credit note by clicking on the Create Credit Note icon for the PO in the Actions column of the Purchase Orders table.

Support

For all system-related questions and technical troubleshooting, please contact Coupa Support by emailing [supplier@coupa.com.](mailto:supplier@coupa.com)

For all Farmers Insurance questions, please contact Farmers Insurance at [farmers.supplier.comms@farmersinsurance.com.](mailto:farmers.supplier.comms@farmersinsurance.com)

Frequently Asked Questions (FAQs)

CSP:
https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_FAQ

Additional Resources

Feel free to explore the Coupa site for all things CSP! Here you can find additional videos, supplier guides, and more.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

Farmers-Specific Help

Farmers Insurance has created a site specifically to address supplier questions. Here you can find process information and even helpful contacts.

https://www.farmers.com/supplier-portal/