

Coupa Supplier Portal (CSP) Overview

April 2023

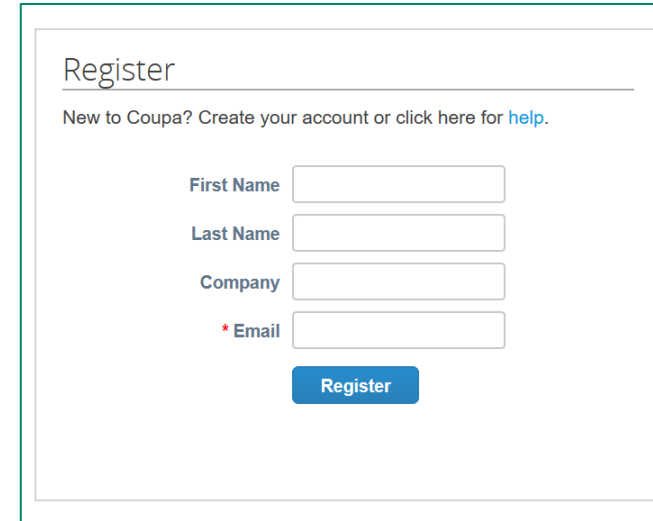
This document provides an overview of the Coupa Supplier Portal (CSP), including registration and login, responding to AECOM information requests, receiving Purchase Orders (POs) and submitting invoices.

How to Register & Login to the Coupa Supplier Portal*

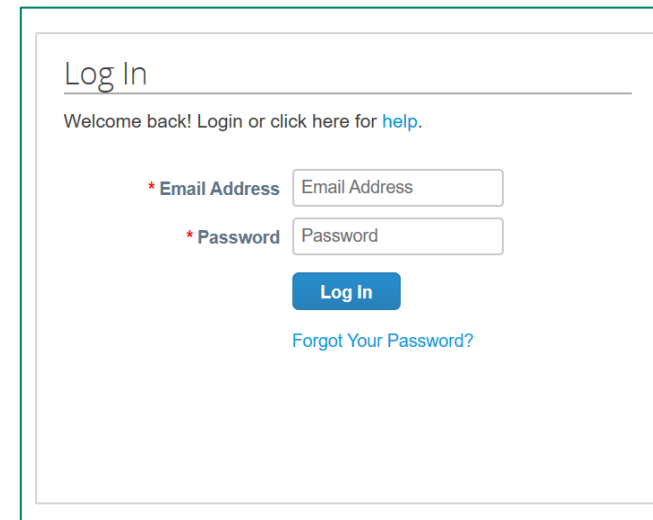
Sign Up or Log In to Get Started...

- To **create an account** on the Coupa Supplier Portal, go to <https://supplier.coupahost.com> and fill out all required information
- **Suggested browser** to use when logging into Coupa is Google Chrome
- Once your **account is created**, you can login to the portal
- **Note:** Please bookmark or **save the above URL**, as this will be used each time to login to the Coupa Supplier Portal

*New suppliers will be invited to join the Coupa Supplier Portal as part of the Supplier Onboarding Process



The screenshot shows the 'Register' page of the Coupa Supplier Portal. It features a title 'Register' and a subtitle 'New to Coupa? Create your account or click here for [help](#).' Below the text are four input fields: 'First Name', 'Last Name', 'Company', and '* Email'. A blue 'Register' button is positioned below the email field.



The screenshot shows the 'Log In' page of the Coupa Supplier Portal. It features a title 'Log In' and a subtitle 'Welcome back! Login or click here for [help](#).' Below the text are two input fields: '* Email Address' and '* Password'. A blue 'Log In' button is positioned below the password field, and a link for 'Forgot Your Password?' is located below the button.

Navigating the CSP: Overview of the Homepage

The **navigation ribbon** on the top of the CSP allows for quick access to all sections of the portal (orders, invoices, profile, etc.)

The 'Profile Summary' section provides **high level CSP connection Metrics**

Key information about your company such as website, common commodities, etc.

The screenshot shows the Coupa Supplier Portal homepage. At the top, there is a navigation ribbon with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. A user profile dropdown menu is visible in the top right corner, showing 'CJ' and 'NOTIFICATIONS 99+'. Below the navigation ribbon, there is a yellow banner that says 'Please fill out your public company profile.' and a red banner that says 'Action needed: Complete your profile to get paid faster and get discovered'. The main content area is divided into several sections: 'Profile Progress' (35% Complete), 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'. The 'Profile Summary' section shows 1 Legal Entity, 1 Registered User, and 1 Connected Customer. The 'Latest Customers' section shows AECOM Technology Corp. The 'Key Information' section shows the company name 'CJ HENSCH & ASSOCIATES INC', website 'http://www.supplierfestsite.com', industry 'Construction of other civil...', and established year '2000'.

Your user profile allows you to **change account settings and notification preferences**

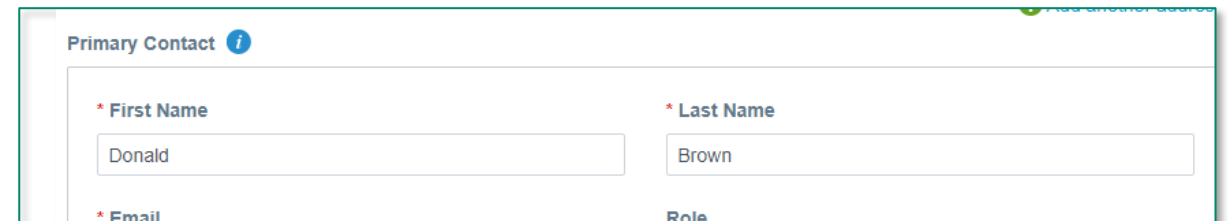
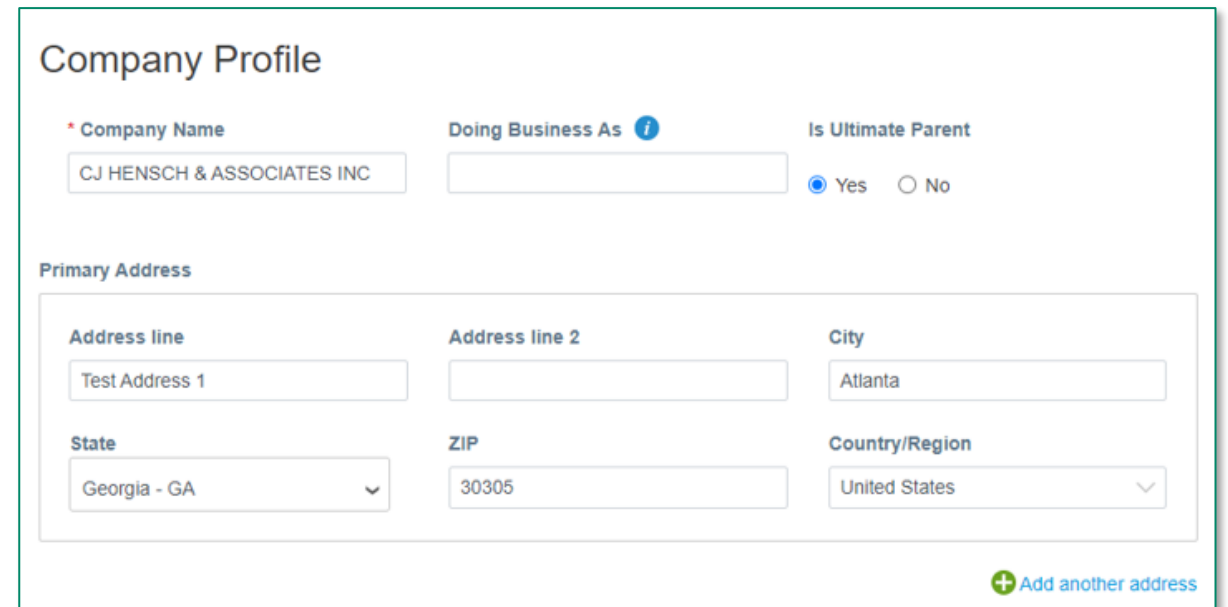
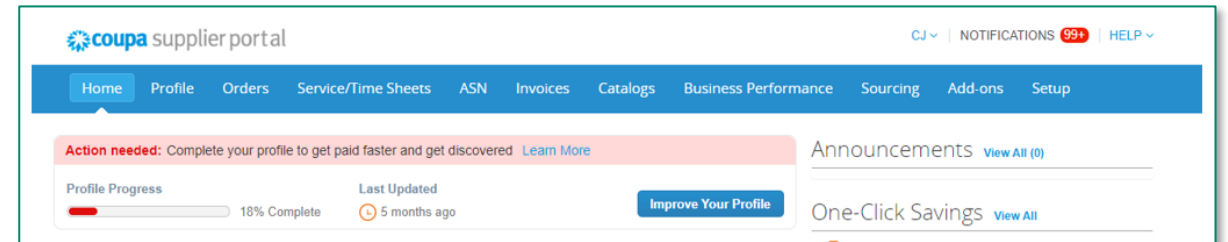
If your company has **multiple CSP accounts**, they can be consolidated in the 'Merge Accounts' section of the homepage

Key customer information can be found in the 'Latest Customers' section

Updating and completing your CSP supplier profile

- When first logging into Coupa, **key company details can be inputted** on the CSP as part of your public profile
- To update and complete your supplier profile, please **click on 'improve your profile'** on the Coupa homepage
- **Basic company and contact information** can be added in the General Information, Address and Primary Contact sections

NOTE: Completing a CSP supplier profile does not *automatically* send supplier information to AECOM. Suppliers must complete and submit AECOM Information Requests.



Updating and completing AECOM's supplier information requests

- Supplier Information Requests sent from AECOM can be completed and submitted by going to the **'Information Requests' tab** under **'Profile'**

Access Information Requests from AECOM

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

Your Profile **Information Requests** Coupa Verified

AECOM Technology Corp

Profile AECOM Technology Corp

✓ We have auto-filled some information from your Public Profile.

External Supplier Update (System Form)

Supplier Information CJ HENSCH & ASSOCIATES INC

* Name CJ HENSCH & ASSOCIATES

Remember to click **'Submit'** to send updates/responses to AECOM

Decline Save **Submit**

If your company **works with multiple customers on the CSP**, they can be selected via the dropdown

Managing Purchase Orders (POs)

- Purchase Orders (POs) sent from AECOM can be managed by going to the **'Orders' tab**

Access Purchase Orders from AECOM

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Orders Order Lines Returns Order Changes Order Line Changes Order Header Confirmations Shipments

Select Customer: AECOM Technology Corp

Purchase Orders

Click the 📄 Action to Invoice from a Purchase Order

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
3001958	03/01/23	Issued	None	Aggregate Surfacing	No	1,000.00 USD		📄 📄 📄
3001956	02/28/23	Issued	None	Aggregate Surfacing	No	1,000.00 USD		📄 📄 📄
3001955	02/28/23	Issued	None	Aggregate Surfacing	No	1,000.00 USD		📄 📄 📄

Clicking on the PO # allows users to see all information about the Purchase Order

Views can be set to see specific types of orders (i.e. open orders, orders past due, etc.). Views can also be used on all tabs in the CSP (Invoices)

Action on POs
 : Flip PO to invoice
 : Create a Credit Note

Key information on each Purchase Order

If your company works with multiple customers on the CSP, they can be selected via the dropdown

General Info
 Purchase Order #3001958
 Status: Issued
 Order Date: 03/01/23
 Total: 1,000.00 USD

Managing Invoices: PO Backed and Non-PO Backed

- Invoices can be sent via the CSP. Invoices can be **directly 'flipped' from a PO** or can be **created as a Non-PO Backed invoice** (i.e., blank invoice)

Access Invoices to send to AECOM

If your company **works with multiple customers on the CSP**, they can be selected via the dropdown

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

Invoices Invoices Lines Payment Receipts

Select Customer: AECOM Technology Corp

To create a **PO backed Invoice**, select 'Create Invoice from PO'

To create a **Non-PO backed Invoice**, select 'Create Blank Invoice'

To create a **Credit Note**, select 'Create Credit Note'

Clicking on the **Invoice #** allows users to see all information about the Invoice

Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	3001972	PK TEST CSP 25	Pending Approval	03/01/23	NET 60 DAYS	03/01/23	
No	3001971	PK TEST CSP 24	Pending Approval	03/01/23	NET 60 DAYS	03/01/23	
No	3001970	PK TEST CSP 23	Pending Approval	03/01/23	NET 60 DAYS	03/01/23	

Managing Invoices: Invoice Attachments

What invoice requirements should you be aware of on the Coupa Supplier Portal?

- The nature of AECOM's business requires us to provide invoice backup from our suppliers to our clients for audit purposes, including subcontractor engagements and other reimbursable costs.
- On the Coupa Supplier Portal, you will be prompted to attach an invoice generated by your internal billing system and any other contractually required documents as part of invoice submission to AECOM. This is in addition to the Coupa generated invoice. An invoice will not be accepted without the required attachment(s).

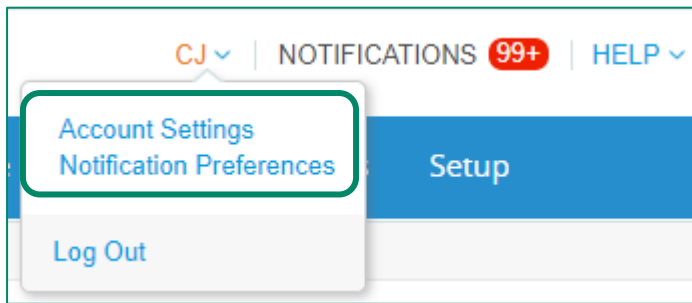
Inviting Other Users at your Company

- Suppliers can **add multiple users to the Coupa Supplier Portal**. To do this, please navigate to the 'Setup' tab and click 'Invite User'.
- Users invited will **receive an email invitation to join**. User permissions can be setup on this tab as well.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Setup' tab is highlighted with a green box and an arrow pointing to a callout box that says 'Review your CSP settings'. Below the navigation bar, the 'Admin' section is active, showing 'Admin Users'. A sidebar on the left lists various settings, with a green box around it and an arrow pointing to a callout box that says 'Additional CSP settings can be found in the 'Setup' tab. Note: these settings can only be changed by users with 'admin' permissions'. The main content area shows a table of users with columns for 'Users', 'Permissions', and 'Customer Access'. The first user listed is 'CJ Hensch' with email 'cjhensch232@gmail.com' and status 'Active'. An 'Edit' button is highlighted with a green box and an arrow pointing to a callout box that says 'Click 'Edit' to adjust user permissions in the CSP'. An 'Invite User' button is also highlighted with a green box and an arrow pointing to a callout box that says 'Click 'Invite User' to send someone at your company an email to join the CSP'. To the right, a modal window titled 'Invite User' is shown, containing fields for 'First Name', 'Last Name', and 'Email', and sections for 'Permissions' and 'Customers' with checkboxes for various access levels.

Updating User Notifications

- Users can **update their account settings and notification preferences** by hovering over their username on the top right corner of the CSP home screen
- User will **need to update their account settings and notification preferences** upon initially logging into the Coupa Supplier Portal. **Note:** the 'Online' notification checkbox stands for notifications that occur within the CSP itself.



My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email Mobile(SMS)

Verify number to receive SMS

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Business Performance

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS