



# Coupa Supplier Guide

Central Procurement

Stand March 2023



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## 1 Introduction to Coupa

### What is Coupa?

NÜRNBERGER has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic Purchase Order and Invoice transmission.

- Coupa is a leading e-Procurement platform, connecting buyers with their suppliers.
- Coupa is an internet-based solution capable of accommodating a variety of different systems. *plug and play*
- The Coupa Supplier Portal (*CSP*) will be used by NÜRNBERGER to request products and services, create and communicate Purchase Orders.

### How will you benefit?

By working with NÜRNBERGER electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, be able to maintain a better presence with NÜRNBERGER.

- Greater control over the order processing.
- Better communication and visibility with NÜRNBERGER.
- Improved directed buy for users to accelerate spend with our preferred suppliers.
- No installation of hardware or software required.
- Web applications that are quick to set up and easy to use.
- Reduced manual paper transaction processing
- Best of all, it's free of charge! There is no cost for you to transact through this application.

### How will you benefit?

#### You Are The Most Important Part Of This Project !

- Supplier participation is key to project success
- You will get support with requirements deriving from electronic processing if needed
- Coupa is lifting suppliers globally to new levels of legal and commercial compliance
- Coupa can enable you by:
  - Pushing legally required data fields per country *Tax and Commercial Laws*
  - Applying population rules to ensure presence of data *Line descriptions, VAT IDs etc.*
  - Applying validation rules to check accuracy of data where possible
  - Using state of the art digital signatures according to locally applicable laws

### Supplier Information – Basic understanding

After reviewing this documentation you will have gained a basic understanding of the Coupa system and it's introduction at NÜRNBERGER.

You will be able to:

- Register and setup your profile on the Coupa Supplier Portal (*CSP*).
- Perform basic navigation of the Coupa Supplier Portal (*CSP*).
- View/manage purchase orders through the Coupa Supplier Portal (*CSP*).

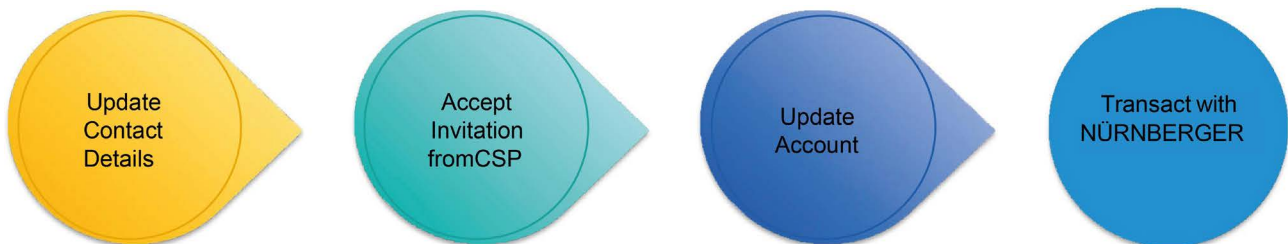
## 2 Registration and Setup

### Transactions in Coupa Via CSP

- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge Pos.
- As a Supplier, you will have the ability to:
  1. Manage your company information
  2. Configure your PO preferences
  3. Create an online catalog
  4. View all of your purchase orders

### Connection to NÜRNBERGER via Coupa

It is imperative that all suppliers connect to the Coupa platform to transact with NÜRNBERGER successfully. Each of the below steps must happen before a supplier can properly interact with us:



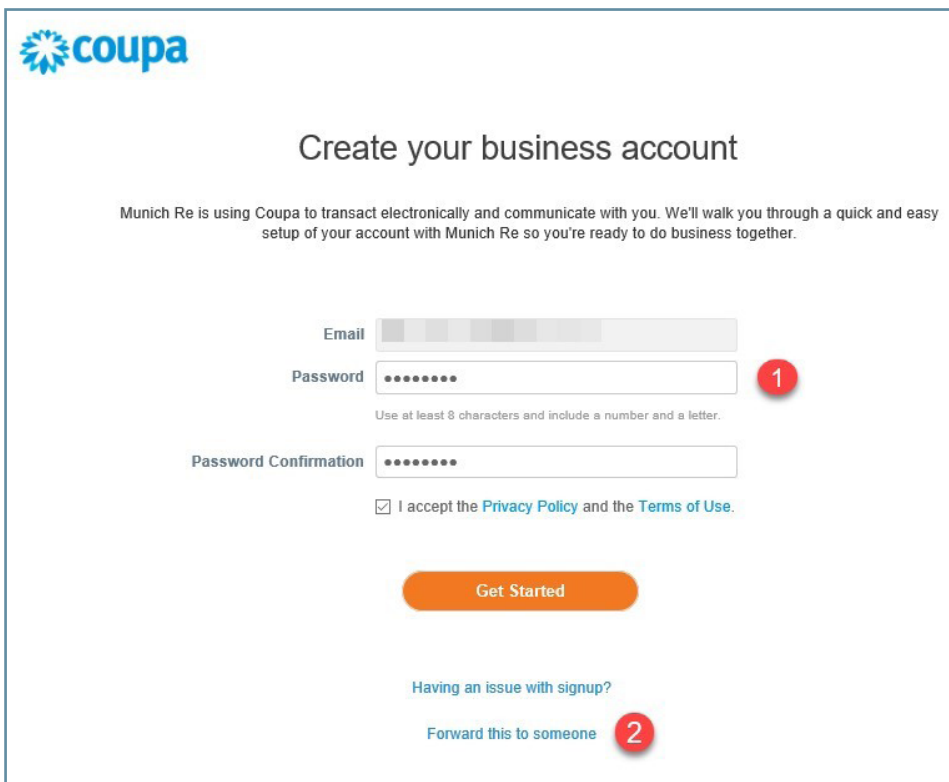
### How to join Coupa Supplier Portal (CSP)

- You will receive an invitation email to the Coupa Supplier Portal from NÜRNBERGER with the subject line: “Action Required from NÜRNBERGER Versicherung – Click Below to Join Coupa”.
- If you did not receive an invitation email, please send a request.
- Please alert your team to keep a look-out for this invitation and act upon it when it is received. Be sure to click only on the direct link „Join and Respond“ (1) at the bottom of the email invitation for CSP account registration. This will take you to the registration screens where you will complete your profile.

You will first be asked to create your password (1) for the Coupa Supplier Portal.

Once the fields are complete, check the Privacy Policy and review Terms of Use, then check box and click “**Get Started**”. You will then be asked to complete the **NÜRNBERGER profile form**.

If you are not the right person, you can forward the invitation to the appropriate individual (2).



**coupa**

## Create your business account

Munich Re is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Munich Re so you're ready to do business together.

Email

Password  **1**

Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

**Get Started**

[Having an issue with signup?](#)

[Forward this to someone](#) **2**

! The **language** can be changed at any time at the bottom of the Portal.



Please complete the questionnaire as follows:

*Some fields may have already been completed by us – please check the data entered and correct if necessary.*

### Address

Please have the following information ready:

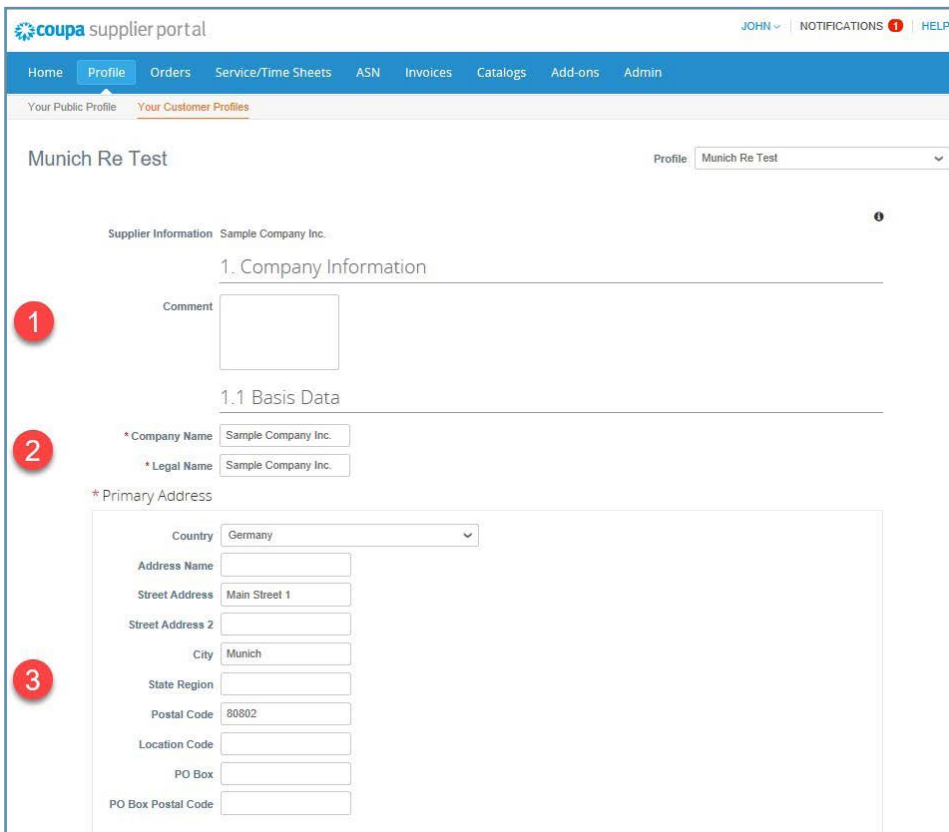
- Street
- Postcode
- City
- Country

**This comment field (1) serves us to send you information in case of an update request.** There is nothing to be entered here from your side.

"Legal Name" (2) is the official name of your company.

"Company Name" is the name by which your company is also known.

Then enter the main address of your company under (3).



The screenshot shows the 'coupa supplier portal' interface for a profile named 'Munich Re Test'. The page is divided into sections for '1. Company Information' and '1.1 Basis Data'. In the '1. Company Information' section, there is a 'Comment' field marked with a red circle '1'. In the '1.1 Basis Data' section, there are fields for '\* Company Name' and '\* Legal Name', both containing 'Sample Company Inc.', marked with a red circle '2'. Below this is the '\* Primary Address' section, marked with a red circle '3', which includes a 'Country' dropdown menu set to 'Germany' and several input fields for 'Address Name', 'Street Address' (containing 'Main Street 1'), 'Street Address 2', 'City' (containing 'Munich'), 'State Region', 'Postal Code' (containing '80802'), 'Location Code', 'PO Box', and 'PO Box Postal Code'.



**Tax numbers and contact details**

Please have the following information ready:

- VAT ID
- PO e-mail *the e-mail address to which orders should be sent*
- Main contact *e.g. Director, key account, etc, first and last name, email address*

Please check that the VAT-ID (1) is entered correctly.

If you do not have a VAT-ID you can enter a different tax number here (2).

The PO email address (*Purchase Order*) (3) is the email address to which orders are sent in your company.

The Accounting Contact Email address (4) is the email address where we can contact your bookkeeping / accounting department.

Under (5) you can enter the main contact person of your company. *Initially, the contact person for Coupa Onboarding may also be named here. You can change the details at any time*

The screenshot shows a registration form with the following fields and callouts:

- 1** VAT ID: DE530. Below the field: "Please leave blank if you do not have a VAT ID."
- 2** Tax number: [Empty field]. Below the field: "For Countries outside of EU please enter Tax Number, if available"
- 3** \* PO Email: [Redacted]@gmail.com. Below the field: "This is where we will send our purchase orders"
- 4** \* Accounting Contact E-Mail: [Redacted]@gmail.com. Below the field: "This is where we will send our questions concerning invoices"

Section: 1.2 Key Account Manager

Primary Contact (Only one can exist)

- 5** First Name: John
- Last Name: Doe
- Email address: [Redacted]@gm.



Questions on corporate responsibility

Question	Answer
3.1	<p>Confirm that your company/firm is committed to application of the "<b>10 principles of the UN Global Compact</b>".</p> <p>If not, please state why not.</p>
3.2	<p><b>Environment:</b> Are you able to confirm that over the last 12 months there have been no serious incidents that adversely affected your company's reputation or its environmental record, and that no information on events of this nature has been published or distributed?</p> <p>If you are not able to provide this confirmation, please give details of the events concerned.</p>
3.3	<p><b>Human rights:</b> Are you able to confirm that over the last 12 months there have been no serious incidents that adversely affected your company's reputation or its human-rights record, and that no information on events of this nature has been published or distributed?</p> <p>If you are not able to provide this confirmation, please give details of the events concerned.</p>
3.4	<p>How do you guarantee <b>compliance</b> with human rights and environment regulations <b>within your own supply chain</b>? Give a brief description of the procedure you have in place or provide a link to your own commitments.</p>

## 2. Corporate Responsibility

Corporate Responsibility is an integral component of Munich Re strategy and is of relevance for all our business fields and activities. We also incorporate ecological and social aspects with regard to the procurement of products and services.

"Munich Re is a member of the UN Global Compact initiative. This commits Munich Re to the protection of human rights, the prevention of forced labour and child labour, and the combating of corruption. Accordingly, as a requirement for cooperation, Munich Re also expects its business partners to commit to the principles of the UN Global Compact. Should these principles be violated, Munich Re reserves the right to extraordinary termination of an agreement for good cause."

Do you confirm that?

\* 3.1 UN Global Compact record  Yes  No

Link: UN Global Compact

In the past 12 months, have there been any serious events related to environmental issues that have negatively impacted your company's reputation and have been published in the media? (refers, for example, to violations of environmental regulations)

\* 3.2 Environmental record  Yes  No

In the past 12 months, have there been any serious events related to human rights issues and compliance with labor laws that have negatively impacted your company's reputation and have been published in the media?

\* 3.3 Human rights record  Yes  No

How do you ensure human rights and environmental compliance in your own supply chain? Describe the implementation in brief or provide a link to your own commitments.

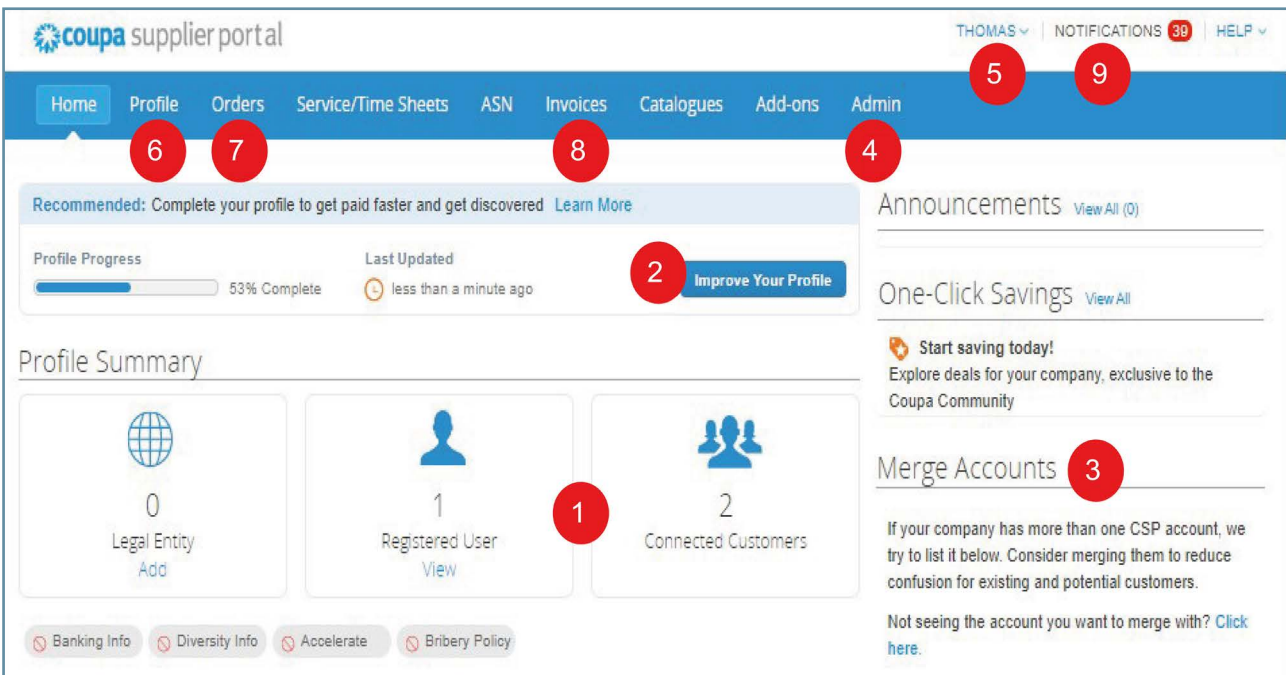
\* 3.4 Compliance in Supply Chain



## 3 Manage your Account

### Home-Screen

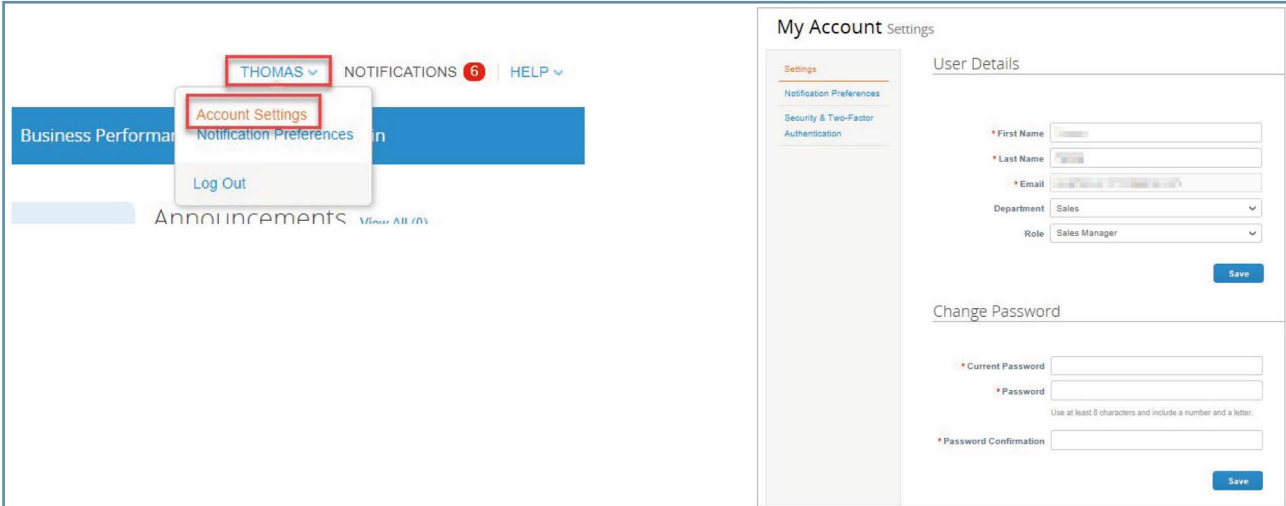
1. Once you click the emailed link and sign up for the CSP, you will find the Home-Screen with a **rough summary about (your internal) registered users and customers you are connected with** via the CSP.
2. In the middle of the home page, is an „**Improve Your Profile**” button. This will allow you to add various pieces of information about your company to your public profile. Please note that any changes you make to your public profile will be available to any of your customers that are using Coupa, not just NÜRNBERGER.
3. On the right-hand side you are able to **Merge Accounts** if you have multiple Coupa Supplier Portal accounts.
4. At the top is the **Admin tab**
5. At the top you find also your **user-settings**
6. Access to **public and customer profiles**
7. Access to manage **orders** of your customer
8. Access to manage **invoices** to your customer
9. **Notifications** sent to you *optional as e-mails*



The screenshot shows the Coupa Supplier Portal Home-Screen. At the top, there is a navigation bar with the following tabs: Home (6), Profile (7), Orders (8), Service/Time Sheets, ASN, Invoices (8), Catalogues, Add-ons, and Admin (4). The user's name 'THOMAS' and a notification count of '38' are visible in the top right corner, along with a 'HELP' dropdown (9). Below the navigation bar, there is a 'Recommended' section with a message: 'Complete your profile to get paid faster and get discovered. Learn More'. A 'Profile Progress' bar shows '53% Complete' and 'Last Updated less than a minute ago'. A prominent 'Improve Your Profile' button (2) is located next to the progress bar. The 'Profile Summary' section displays three cards: 'Legal Entity Add' (0), 'Registered User View' (1), and 'Connected Customers' (2). Below these cards are links for 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'. On the right side, there are sections for 'Announcements View All (0)', 'One-Click Savings View All', and 'Merge Accounts' (3). The 'Merge Accounts' section includes a message: '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.'

## Account Settings

- Once, you click the emailed link and sign up for the CSP, you can manage your account information.
- Click on your **user** and **Account Settings**.
- Edit your **first name**, **last name**, **email\*** and **password**.

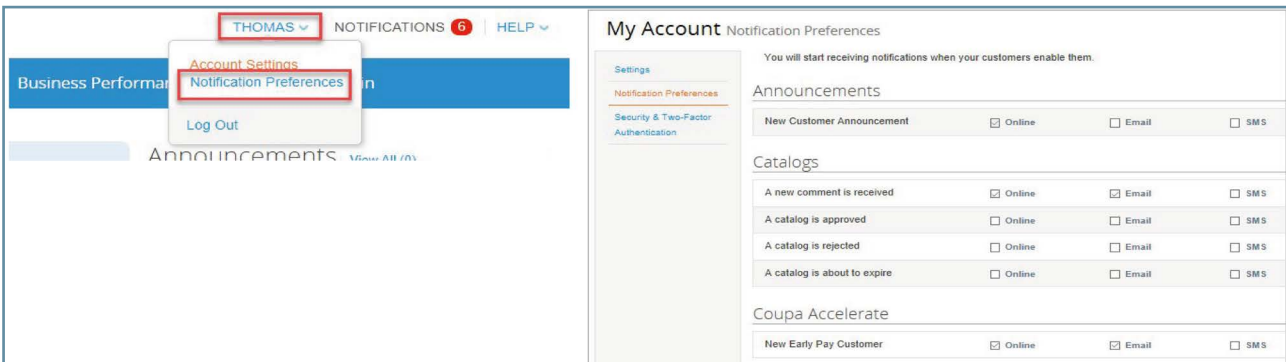


The screenshot shows the 'My Account Settings' page. On the left, a navigation menu includes 'Business Performance', 'Notification Preferences', and 'Log Out'. The user's name 'THOMAS' is displayed with a dropdown arrow. A 'NOTIFICATIONS' badge shows '6' new notifications. The 'Account Settings' menu item is highlighted. The main content area is titled 'My Account Settings' and includes a sidebar with 'Settings', 'Notification Preferences', 'Security & Two-Factor Authentication', and 'Authentication'. The 'User Details' section contains input fields for 'First Name', 'Last Name', and 'Email', along with dropdown menus for 'Department' (Sales) and 'Role' (Sales Manager). A 'Save' button is located below these fields. The 'Change Password' section includes input fields for 'Current Password', 'Password', and 'Password Confirmation', with a note: 'Use at least 8 characters and include a number and a letter.' A 'Save' button is also present at the bottom of this section.

## View and Manage Notifications

On the **Notification Preferences** page, you will be able to select notifications you want to receive as well as the channel where you want to receive the notification: **online** ("Notifications" in the CSP) – recommended, **email** – recommended, or **SMS\*** (short text message).

\* SMS: You can choose to receive notifications in short text messages only if you have an SMS-capable device and you validate your phone number. SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. You can verify your mobile phone for SMS notification receiving on **Security and Two-Factor Authentication** page.)



The screenshot shows the 'My Account Notification Preferences' page. The navigation menu is similar to the previous screenshot, but the 'Notification Preferences' menu item is highlighted. The main content area is titled 'My Account Notification Preferences' and includes a sidebar with 'Settings', 'Notification Preferences', 'Security & Two-Factor Authentication', and 'Authentication'. The main content area contains a message: 'You will start receiving notifications when your customers enable them.' Below this, there are three sections: 'Announcements', 'Catalogs', and 'Coupa Accelerate'. Each section has a table of notification types with checkboxes for 'Online', 'Email', and 'SMS'.  
 Announcements:  
 - New Customer Announcement:  Online,  Email,  SMS  
 Catalogs:  
 - A new comment is received:  Online,  Email,  SMS  
 - A catalog is approved:  Online,  Email,  SMS  
 - A catalog is rejected:  Online,  Email,  SMS  
 - A catalog is about to expire:  Online,  Email,  SMS  
 Coupa Accelerate:  
 - New Early Pay Customer:  Online,  Email,  SMS



## Updating your Public Supplier Profile

- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Profile information.
- Select **Profile – Your Public Profile** from the top menu bar.

### EditCompany Info

#### To start, complete your Public Profile\*:

\* *Public profile is what other Coupa customers, aside NÜRNBERGER, can see about your company on the CSP. You can also edit specific profiles for each customer (Your Customer Profiles)*

- Click **Edit Profile**

The screenshot displays the 'coupa supplier portal' interface. At the top right, the user 'THOMAS' is logged in, with 'NOTIFICATIONS 39' and a 'HELP' link. The main navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Add-ons', and 'Admin'. Under the 'Profile' menu, 'Your Public Profile' is selected and highlighted with a red box. The page content is divided into two main sections: 'Contact Information' and 'Description'. The 'Contact Information' section includes fields for 'Address' (Germany), 'Primary Contact', 'Work Phone' (+49), 'Mobile Phone' (+49), and 'Fax Number' (+49). The 'Description' section is currently empty. A blue 'Edit Profile' button is located at the bottom right of the page.

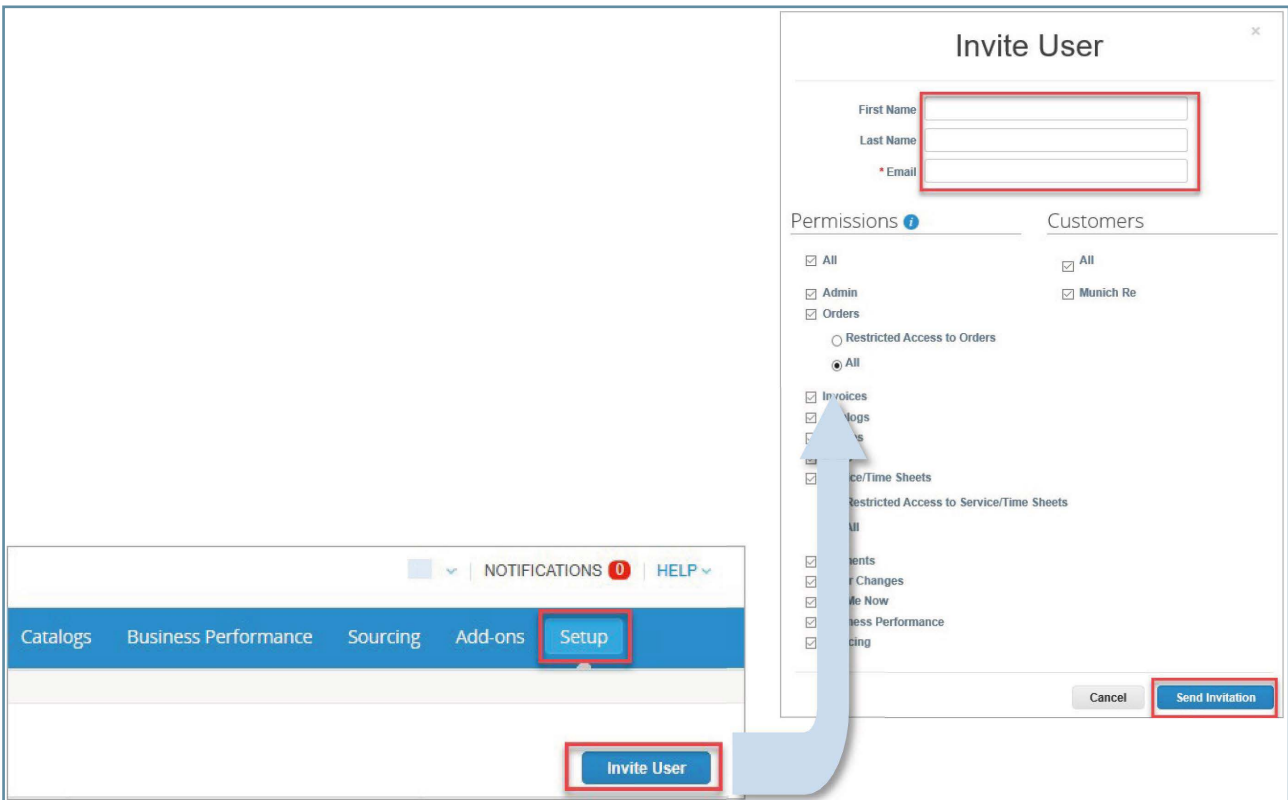
## Invite internal Users 1/2

### Add Users

If desired, you can allow additional users access to your supplier account to perform all tasks\*:

\* You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.

- From the top menu bar, select **Admin** , then click **Invite User**
- Enter at least the employee's email address in the **Invite User** popup window and click **Send Invitation**
- You can restrict access to specific **customers** and **permissions** by checking/unchecking customer name boxes and permission boxes in the user table

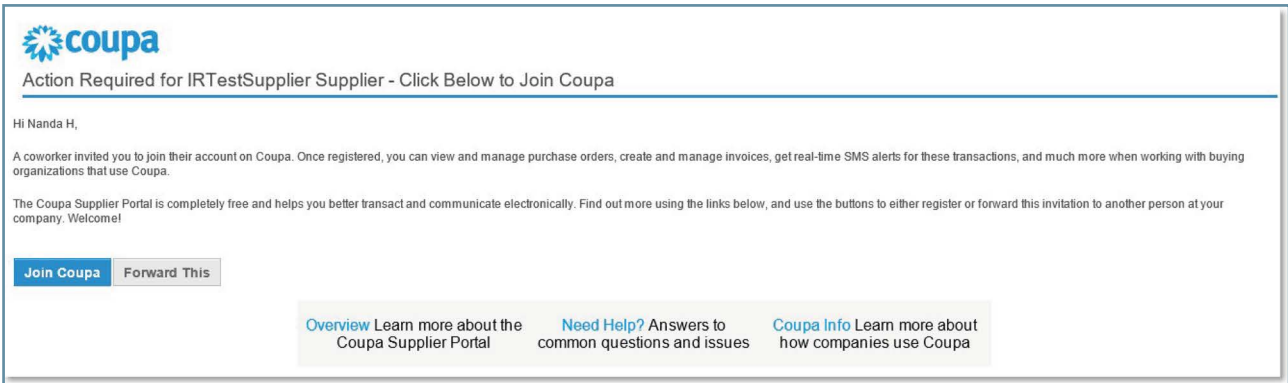


The screenshot illustrates the 'Invite User' workflow. In the main application interface, the 'Setup' menu item is highlighted in the top navigation bar, and an 'Invite User' button is visible in a table below. A detailed 'Invite User' popup window is shown, featuring input fields for 'First Name', 'Last Name', and 'Email' (marked as required). The popup also includes sections for 'Permissions' and 'Customers', each with a list of checkboxes for selection. At the bottom of the popup, there are 'Cancel' and 'Send Invitation' buttons. A blue arrow indicates the flow from the 'Invite User' button in the table to the 'Send Invitation' button in the popup.

## Invite internal users 2/2

### Notification sample

After you have sent the invitation, the employee will receive an email notification, with a link to register.

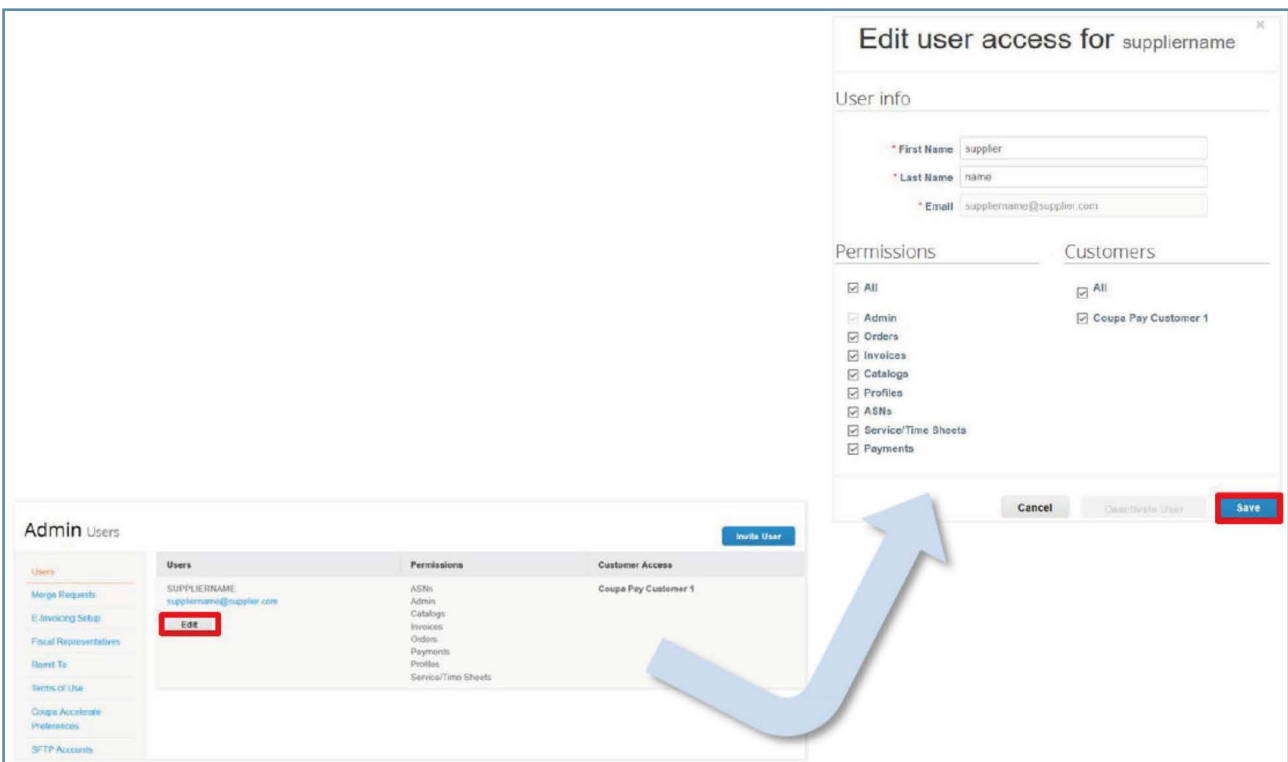


## Editing Users

### Edit Existing Users

You can edit and manage individual user access at any time:

- From the top menu bar, select **Admin**, then click **Edit** under the desired User's name
- Modify the specific permissions and customer access by checking/unchecking respective boxes in the popup window user table
- Click **Save** when finished
- For auditing purposes, Coupa doesn't allow users to be deleted. You can **deactivate** a user when you no longer want that user to be able to access the account. You can also **reactivate** users later.





### Public and client-specific company profiles

There are generally two different profiles:

- **Public profile:** contains general information on your company (e.g. name, logo, area of activity, number of employees, profiles in social networks or contact information). Your public profile enables other companies to find your company in the Supplier Portal Register and then contact you. The public information is stored in the General information area.
- **Client-specific company profile:** contains general information of interest to customers or suppliers such as addresses, contact persons and contact details, and corporate identity information (DUNS and VAT number).

When you have made all the changes, click on „Save”.

supplier portal
JOHN | NOTIFICATIONS 1 | HELP

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Add-ons
Admin

Your Public Profile
Your Customer Profiles

#### General Information

\* Name

Logo

Profile Background

Industry

Year Established

Short Description

Full Description

Registered Users juliusflavius+18550@gmail.com

Web Site

LinkedIn Profile

Facebook Profile

Twitter Profile

#### Address

Address Line 1

Address Line 2

City

State

Postal Code

Country

#### Primary Contact

\* First Name

\* Last Name

\* Email

Work Phone

Mobile Phone

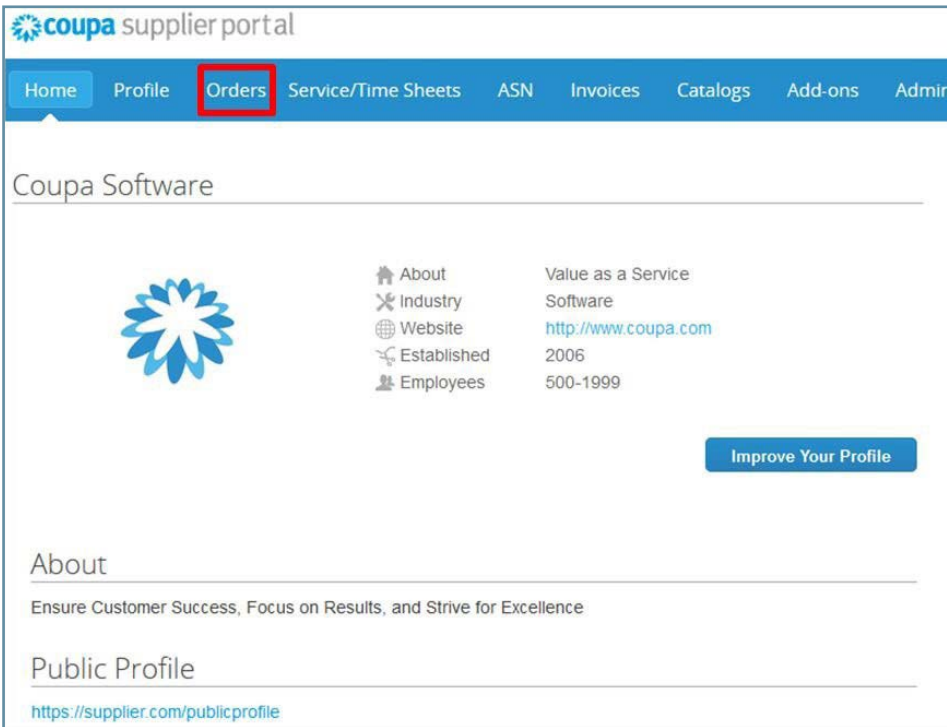
Fax Number

PO Delivery Email

## 4 Purchase Orders

### Receive & View Orders (1/2)

- Select **Orders** from the top menu bar.



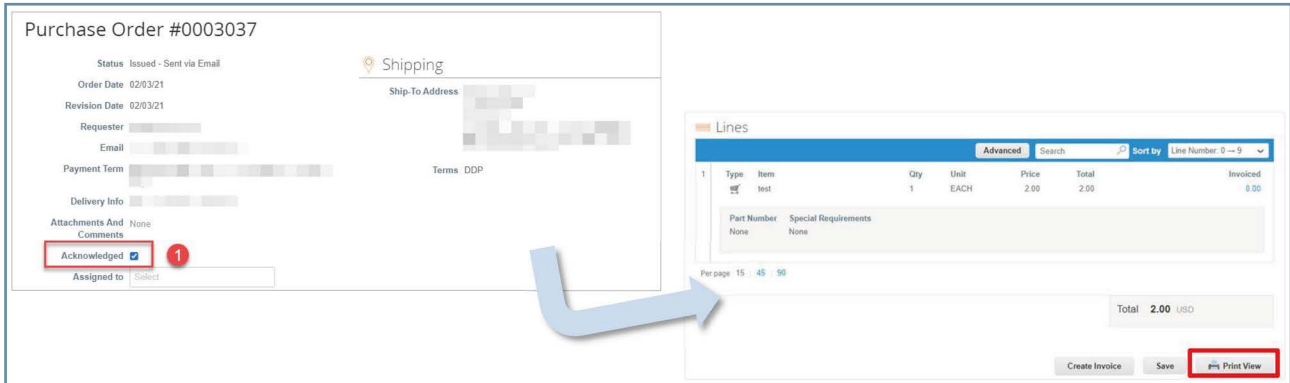
The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, **Orders** (highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, the page title is "Coupa Software". The main content area features the Coupa logo, a list of links (About, Industry, Website, Established, Employees), and a "Value as a Service" section with details like "Software", "http://www.coupa.com", "2006", and "500-1999". There is also an "Improve Your Profile" button. Below this, there is an "About" section with the text "Ensure Customer Success, Focus on Results, and Strive for Excellence" and a "Public Profile" section with the URL "https://supplier.com/publicprofile".

### Receive & View Orders (2/2)

- A **Purchase Orders** screen will display and show all purchase orders sent by NÜRNBERGER. Please choose NÜRNBERGER at **Select Customer**.
- To find purchase orders, you can use the **Search** functionality. You can also sort by column headers by clicking on any of the column headers (*PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions*).
- In addition, as you start to receive multiple purchase orders, you can use the **View** functionality to filter the purchase orders.
- All purchase orders on this screen are hyperlinked, and you can view additional information about the purchase order by clicking on that blue hyperlink, i.e. **PO Number**.

## Acknowledge Orders

- The page refreshes to display the PO details and shipping address.
- Check the **Acknowledged** box (1) to let the requester know that you have received the PO and will act. NÜRNBERGER can see the status update.
  - \* *If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address*
- You can print the PO in PDF version by clicking Print View.



Purchase Order #0003037

Status: Issued - Sent via Email  
Order Date: 02/03/21  
Revision Date: 02/03/21

Requester: [Redacted]  
Email: [Redacted]  
Payment Term: [Redacted]  
Delivery Info: [Redacted]

Attachments And Comments: None

**Acknowledged**  (1)  
Assigned to: [Select]

Shipping  
Ship-To Address: [Redacted]  
Terms: DDP

**Lines**

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test	1	EACH	2.00	2.00	0.00
Part Number: None		Special Requirements: None				

Per page: 15 45 90

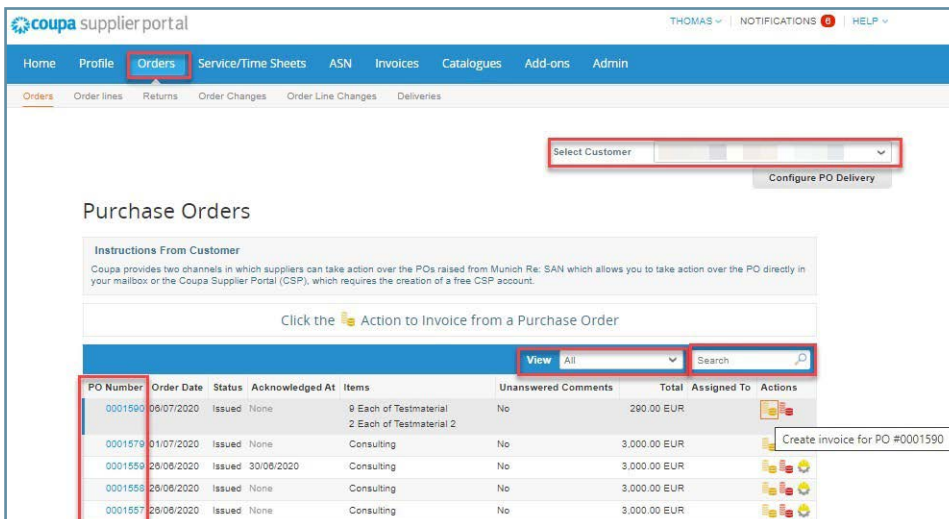
Total: 2.00 USD

Create Invoice Save **Print View**

The **Orders** tab at the top of the home page will display all **Purchase Orders** sent by NÜRNBERGER. Use the **Search** functionality to find purchase orders by number. You can sort by column, by clicking on any of the column headers (*PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions*). **View** functionality should be set to "All".

All purchase orders on this screen are hyperlinked and you can view additional information about the purchase order by clicking on the blue PO# hyperlink.

If you're not seeing a particular PO you may need to select one of the other NÜRNBERGER customer records using the **Select Customer** dropdown.



coupa supplier portal

THOMAS | NOTIFICATIONS | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Add-ons Admin

Orders Order Lines Returns Order Changes Order Line Changes Deliveries

Select Customer [Dropdown] Configure PO Delivery

**Purchase Orders**

Instructions From Customer  
Coupa provides two channels in which suppliers can take action over the POs raised from Munich Re: SAN which allows you to take action over the PO directly in your mailbox or the Coupa Supplier Portal (CSP), which requires the creation of a free CSP account.

Click the Action to Invoice from a Purchase Order

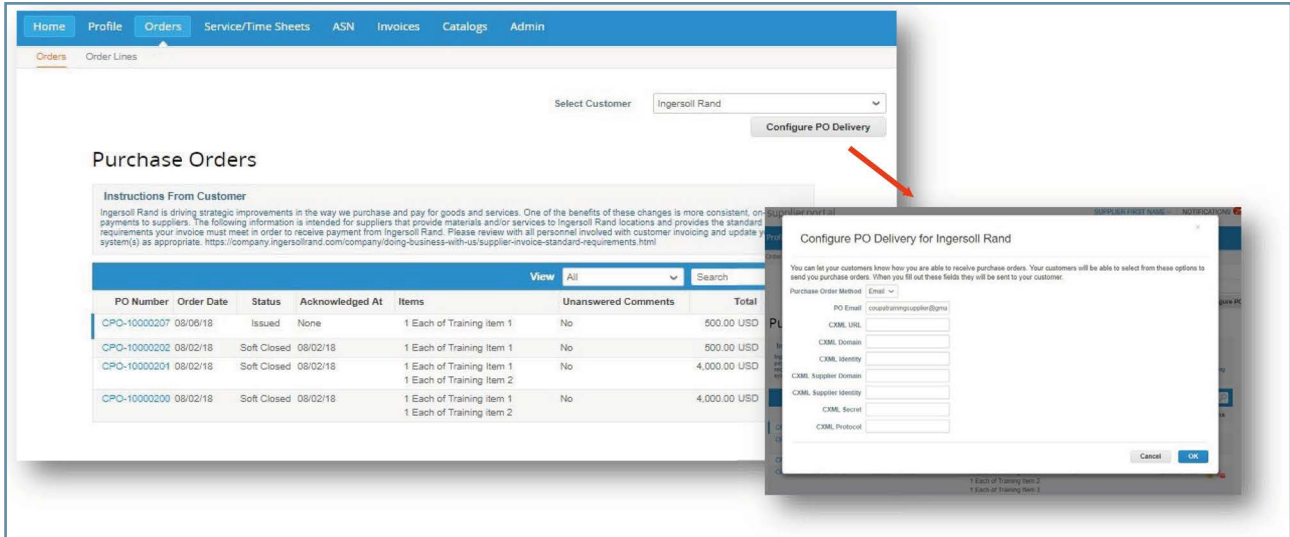
View: All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
0001590	09/07/2020	Issued	None	9 Each of Testmaterial 2 Each of Testmaterial 2	No	290.00 EUR		
0001570	01/07/2020	Issued	None	Consulting	No	3,000.00 EUR		
0001550	29/06/2020	Issued	30/08/2020	Consulting	No	3,000.00 EUR		
0001553	29/06/2020	Issued	None	Consulting	No	3,000.00 EUR		
0001557	29/06/2020	Issued	None	Consulting	No	3,000.00 EUR		

Create invoice for PO #0001590

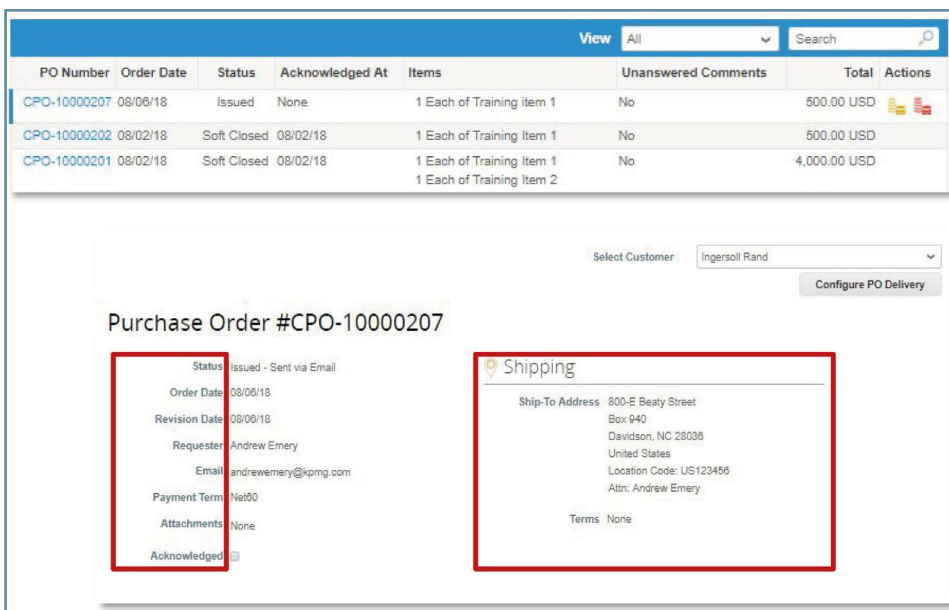


- Set your PO delivery preferences by clicking the Configure PO Delivery button.
- Let us know how you'd like to receive purchase orders by entering an email address or cXML credentials. For cXML requests, please reach out to us.
- When you click on a purchase order blue hyperlink the purchase order will open.



**At the top it will show you:**

- Status,
- Order Date,
- Revision Date,
- the original Requester,
- the requester's Email,
- the Payment Terms you've negotiated
- Attachments.





In the upper right hand corner you can see the shipping address.

- The type of order **QTY** or **AMT**
- **Quantity** Ordered and **Price**
- **A Description of what has been ordered**

**By clicking on "acknowledged" you confirm the receipt and content of the order.**

**Print View** will open another window displaying additional information, such as currency and contact information and Terms & Conditions.

The **Comments** section will allow you to add comments to the purchase order

## 5 Support

### Additional resources

The purpose of this training slides is to review best practices and provide a training overview for working with NÜRNBERGER via Coupa. This document will not be addressing other potential areas of interest, such as Coupa punch-out or cXML.

**We recommend the following links to learn more about Coupa processes:**

- We recommend the **Coupa Success Portal** for additional info, videos and help: <https://success.coupa.com>
- **Coupa Supplier Portal Log In:** <https://supplier.coupahost.com>

Thank you for your cooperation and partnership!