Coupa Supplier Guide

Central Procurement

Stand March 2023

1 Introduction to Coupa 3
What is Coupa? 3
How will you benefit? 3
How will you benefit? 3
Supplier Information – Basic understanding 3
2 Registration ans Setup 4
Transactions in Coupa Via CSP 4
Connection to NÜRNBERGER via Coupa 4
How to join Coupa Supplier Portal *(CSP)* 5
3 Manage your Account 9
Home-Screen 9
Account Settings 10
View and Manage Notifications 10
Updating your Public Supplier Profile 11
Invite internal Users 1/2 12
Invite internal users 2/2 13
Editing Users 13
Public and client-specific company profiles 14
4 Purchase Orders 15
Receive & View Orders *(1/2)* 15
Receive & View Orders *(2/2)* 15
Acknowledge Orders 16
5 Support 19
Additional resources 19

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)*.

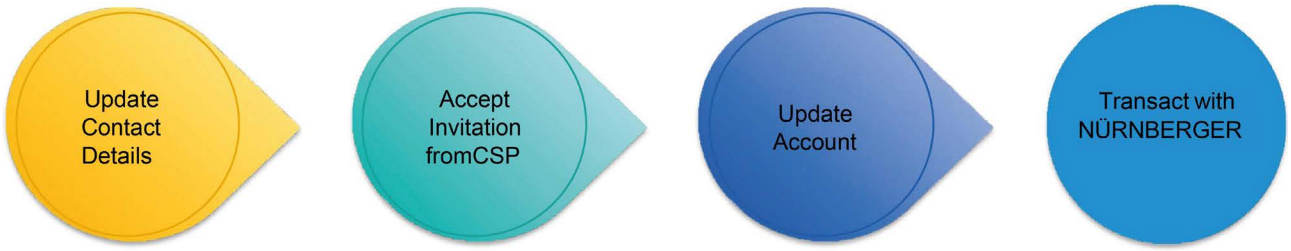
2 Registration ans Setup

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:

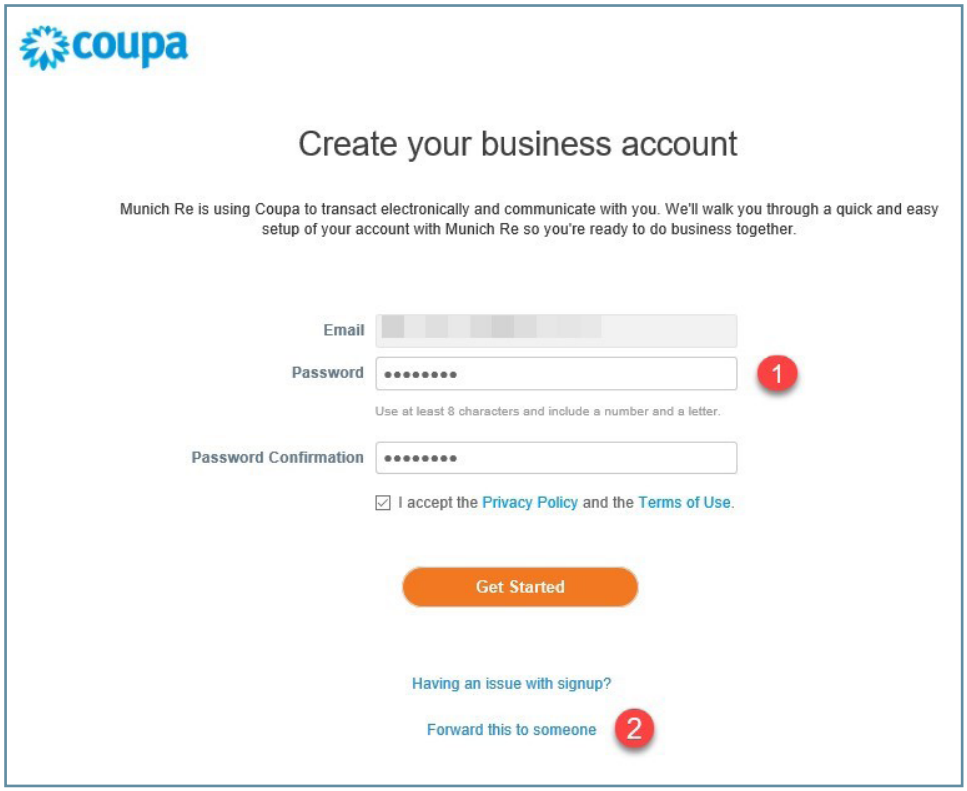
  "Action Required from NÜRNBERGER Versicherung – Click Below to Join Coupa".

- 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)*.



ⓘ 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

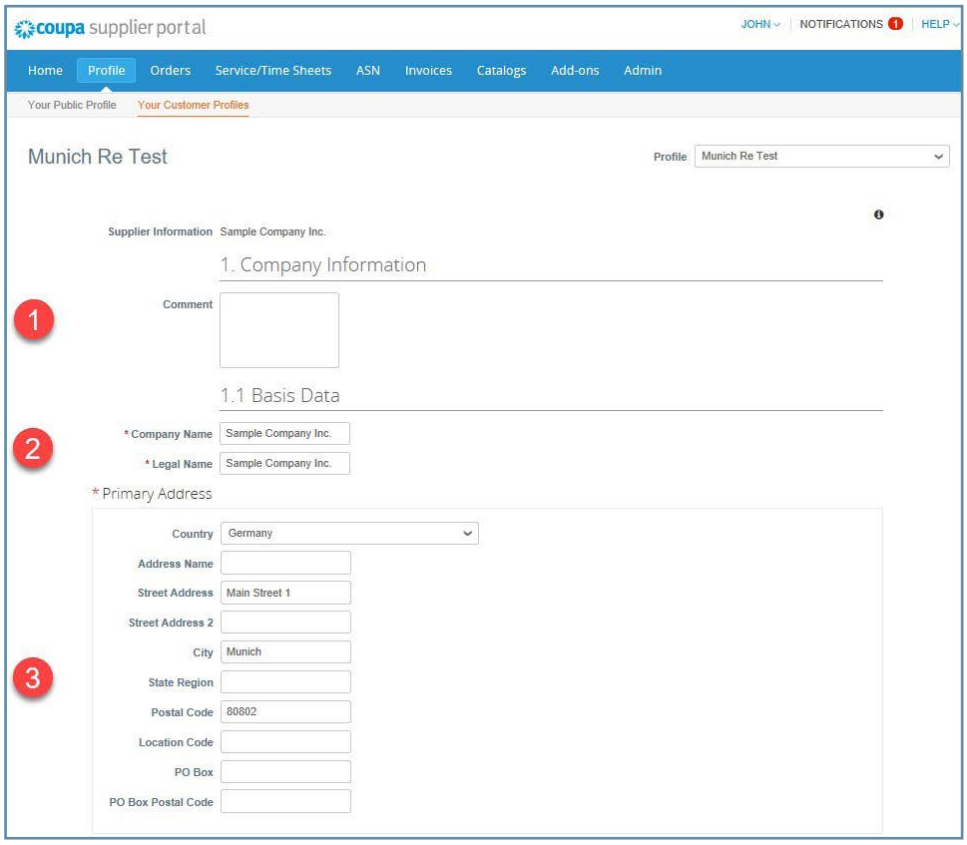
Please have the following information ready:

- 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)*.



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*

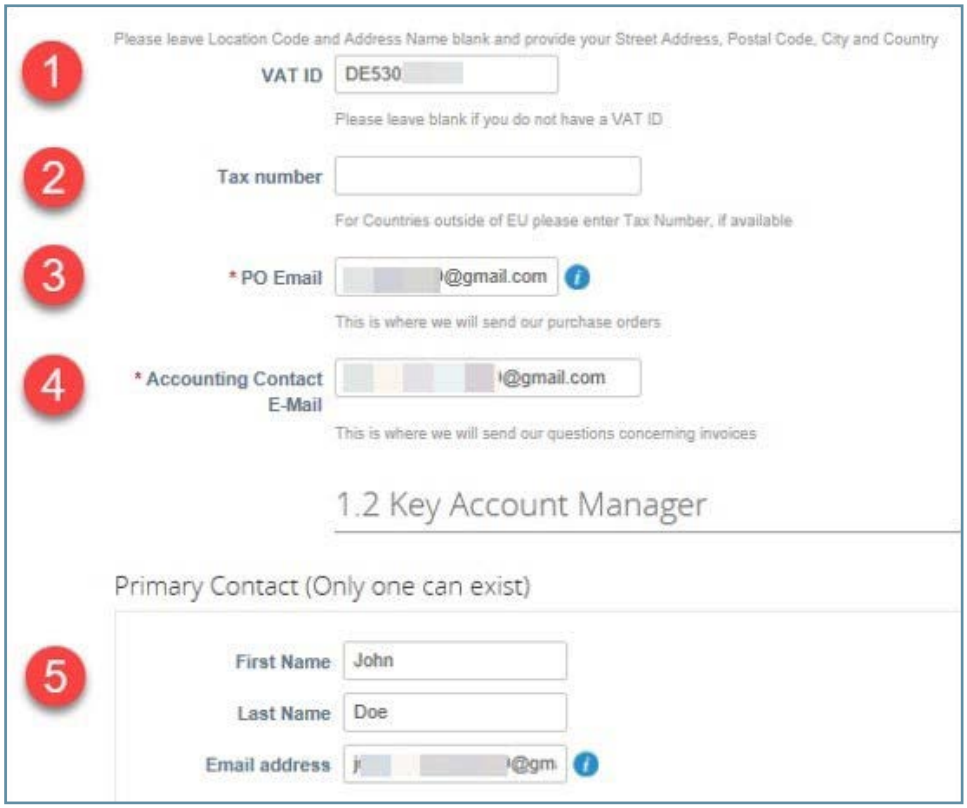
Please check that the VAT-ID *(1)* is entered correctly.

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.

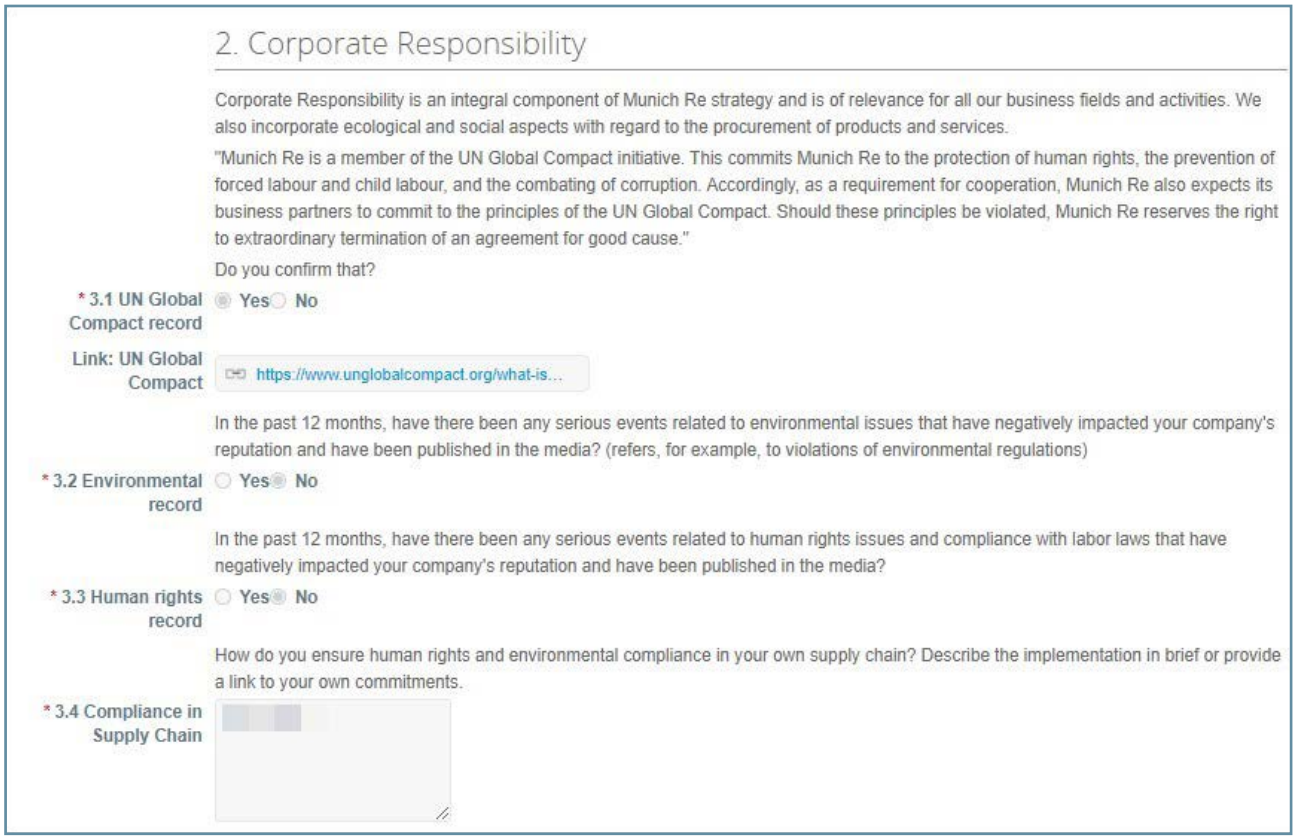
The Accounting Contact Email address *(4)* is the email address where we can contact your bookkeeping / accounting department.

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*



Questions on corporate responsibility

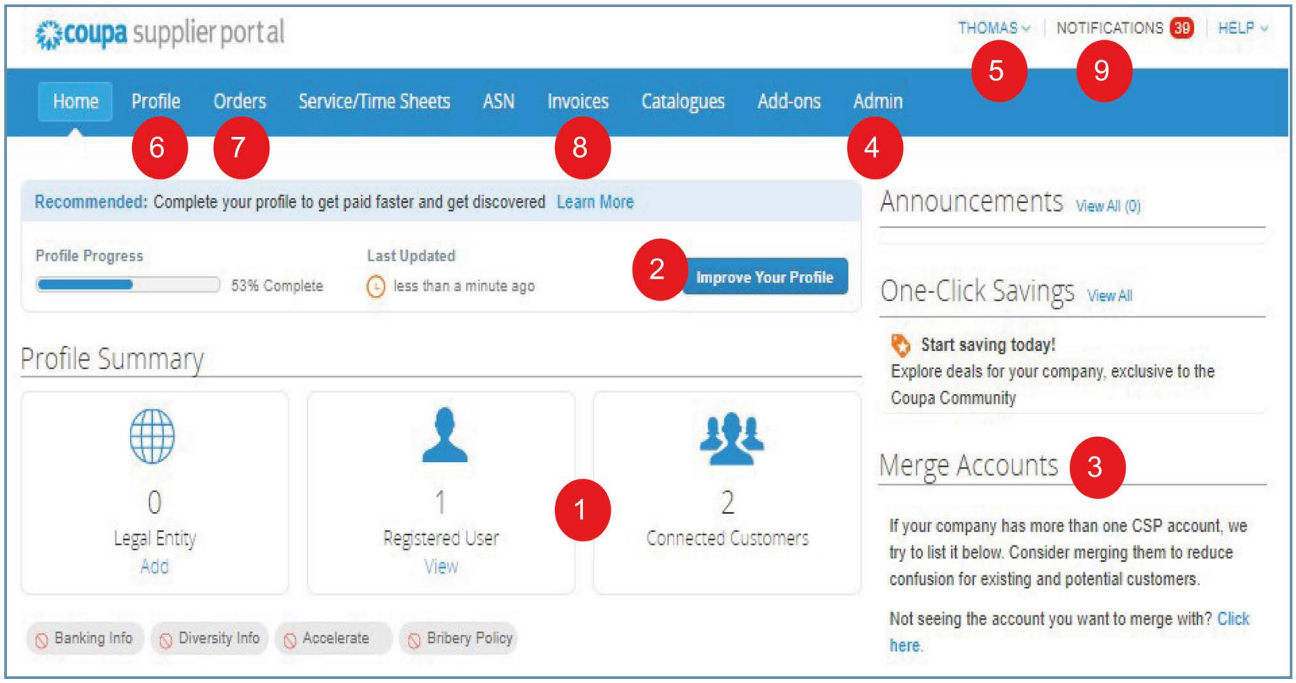
Question	Answer
3.1	Confirm that your company/firm is committed to application of the "**10 principles of the UN Global Compact**". If not, please state why not.
3.2	**Environment**: Are you able to confirm that over the last 12 months there have been no serious incidents that adversely affected your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



3 Manage your Account

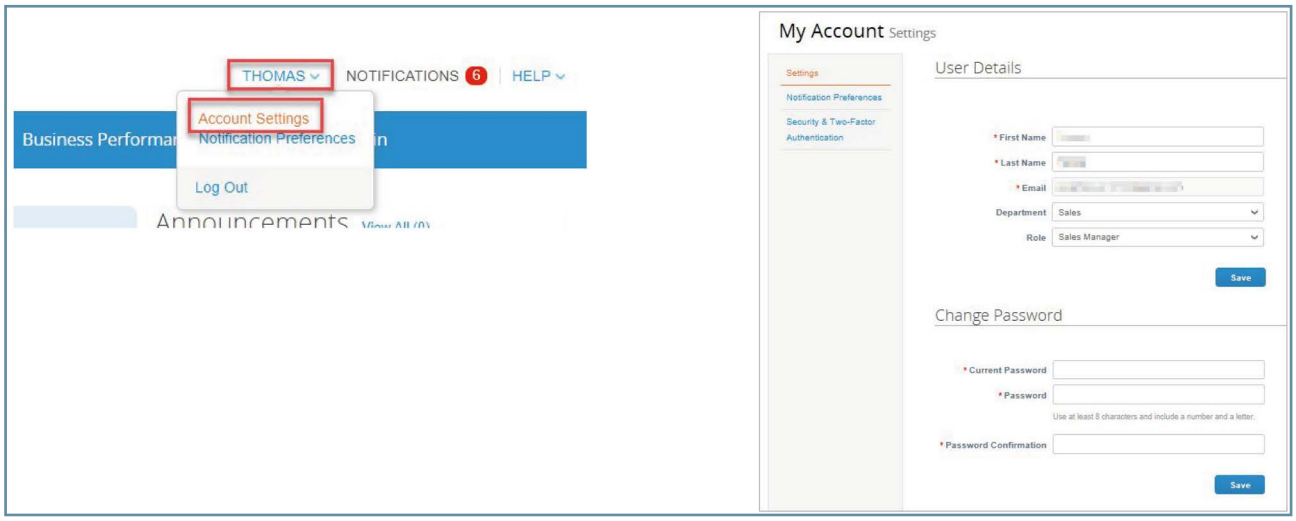
Home-Screen

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*



Account Settings

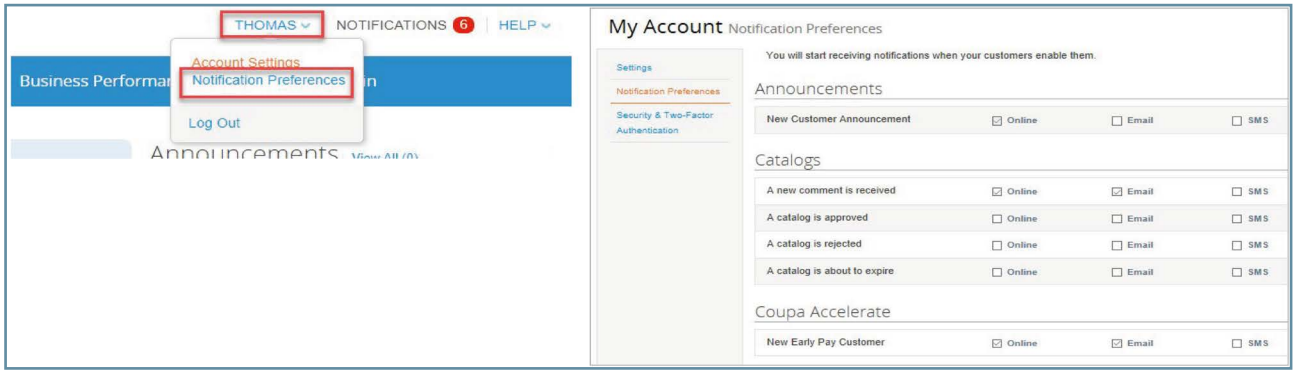
- Once, you click the emailed link and sign up for the CSP, you can manage your account information.
- Click on your **user** and **Account Settings**.
- Edit your **first name**, **last name**, **email*** and **password**.



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.)*



Updating your Public Supplier Profile

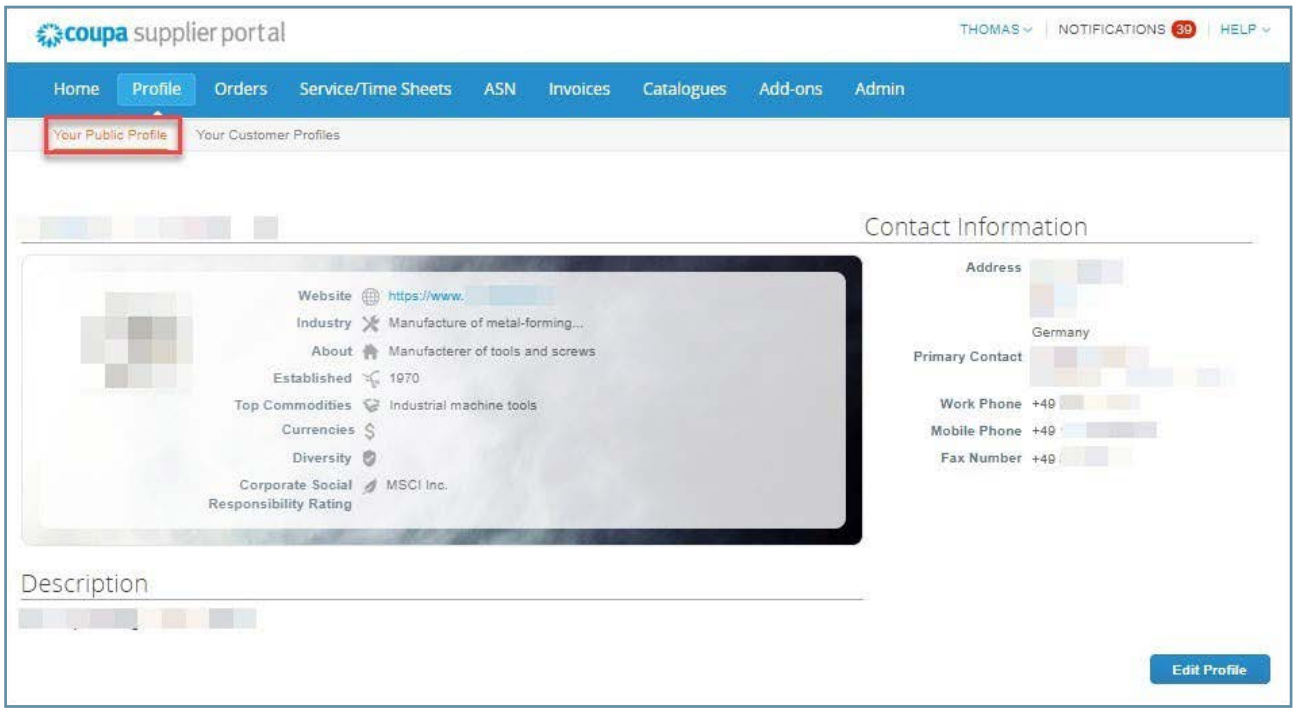
- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Profile information.
- Select **Profile – Your Public Profile** from the top menu bar.

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**



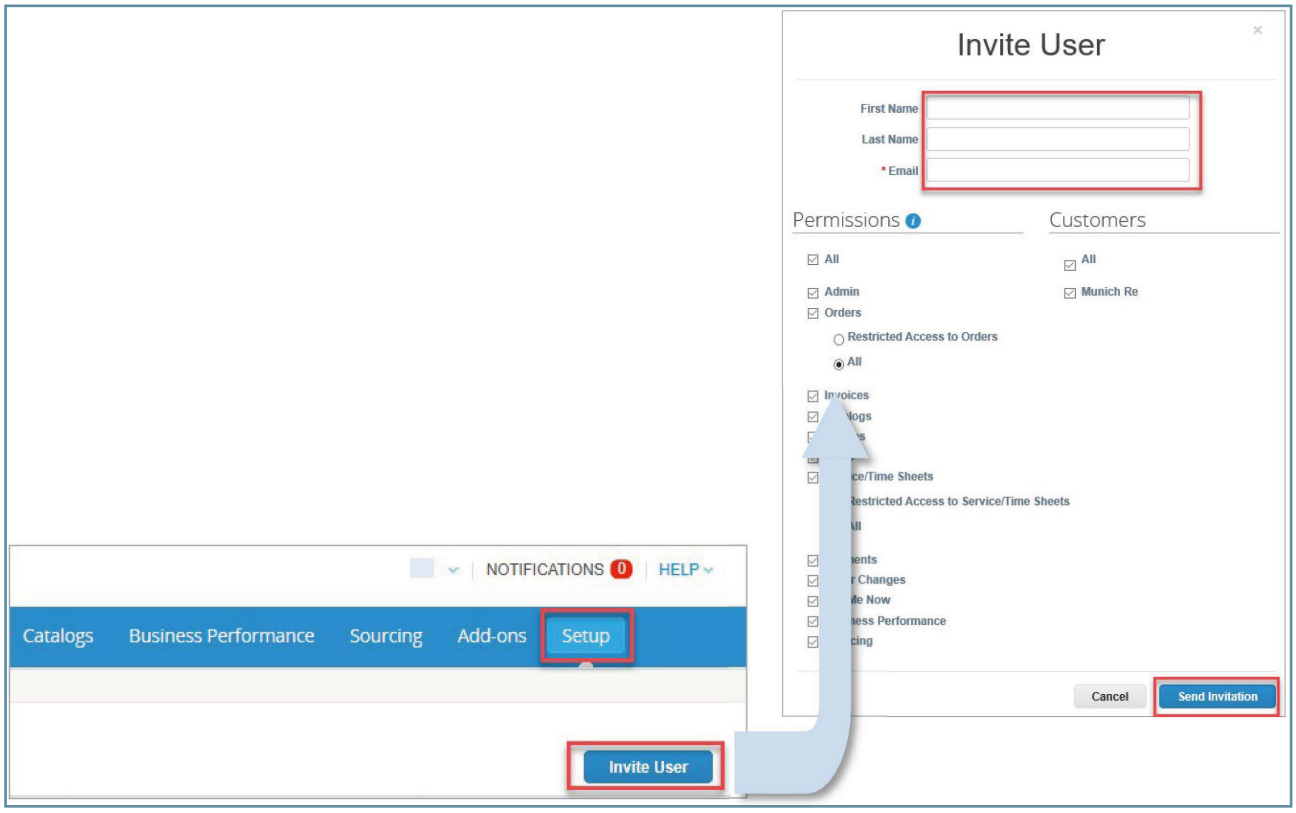
Invite internal Users 1/2

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.*

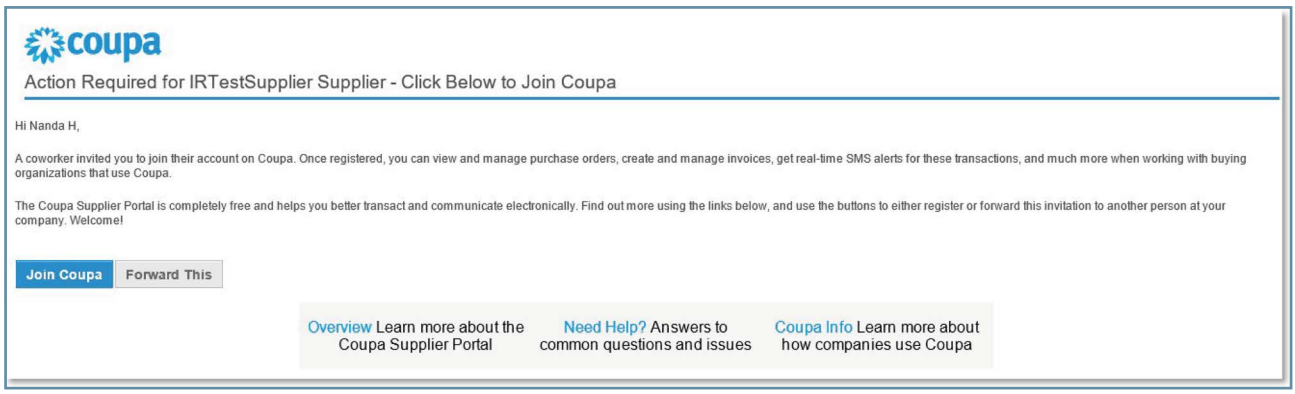
- From the top menu bar, select **Admin** , then click **Invite User**
- Enter at least the employee's email address in the **Invite User** popup window and click **Send Invitation**
- You can restrict access to specific **customers** and **permissions** by checking/unchecking customer name boxes and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



Invite internal users 2/2

Notification sample

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

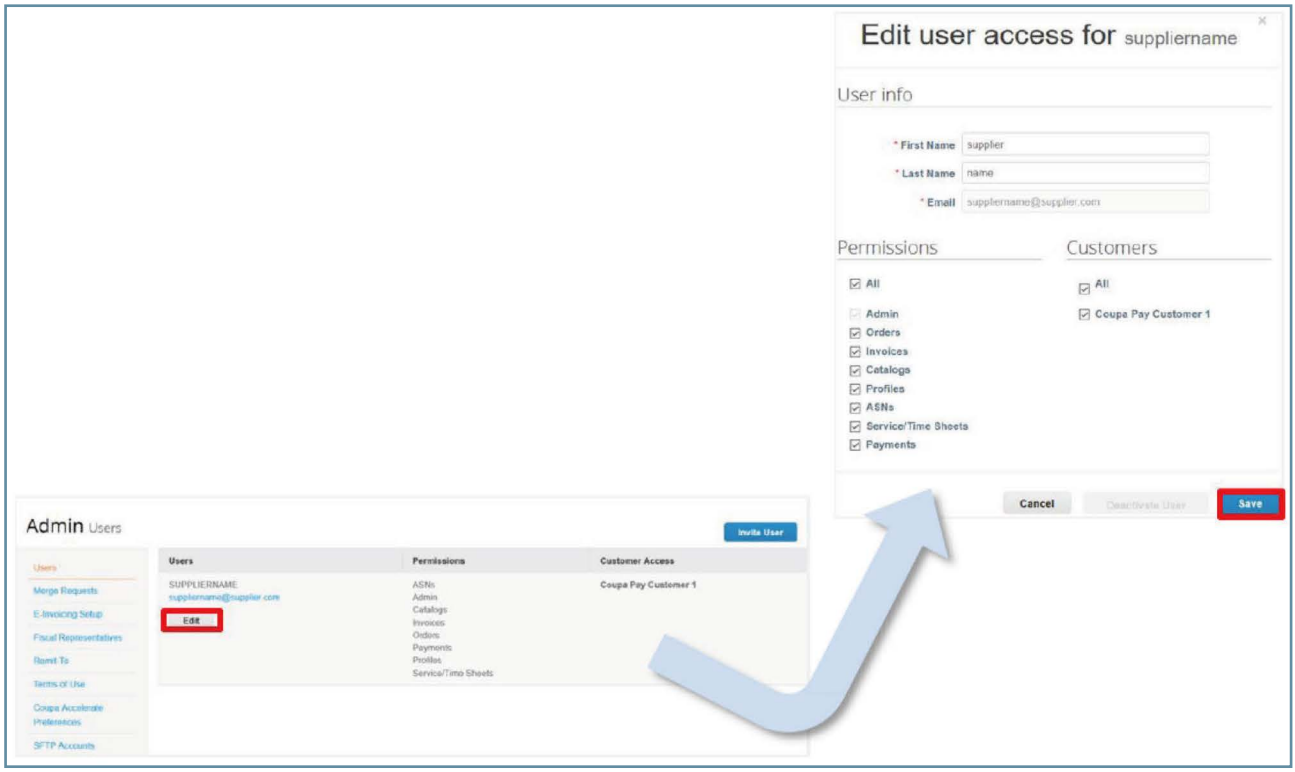


Editing Users

Edit Existing Users

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

- From the top menu bar, select **Admin**, then cklick **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.

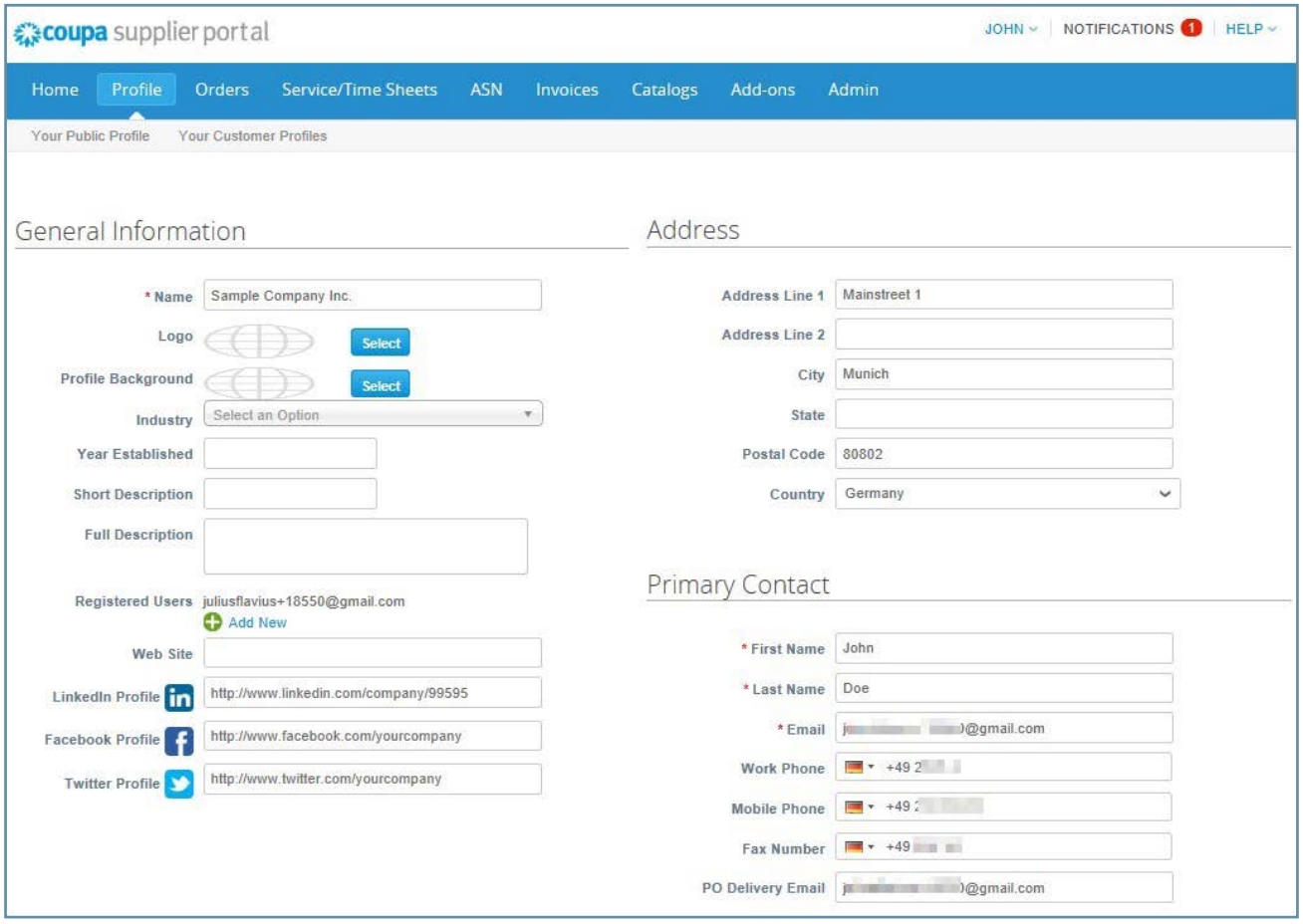


Public and client-specific company profiles

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)*.

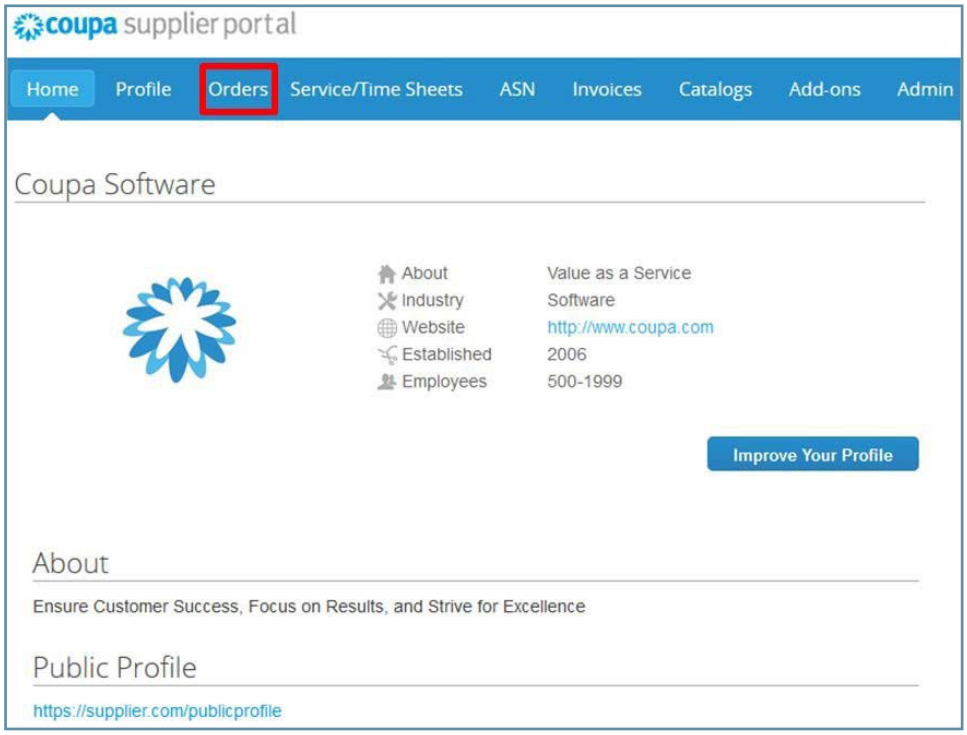
When you have made all the changes, click on „**Save**".



4 Purchase Orders

Receive & View Orders *(1/2)*

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

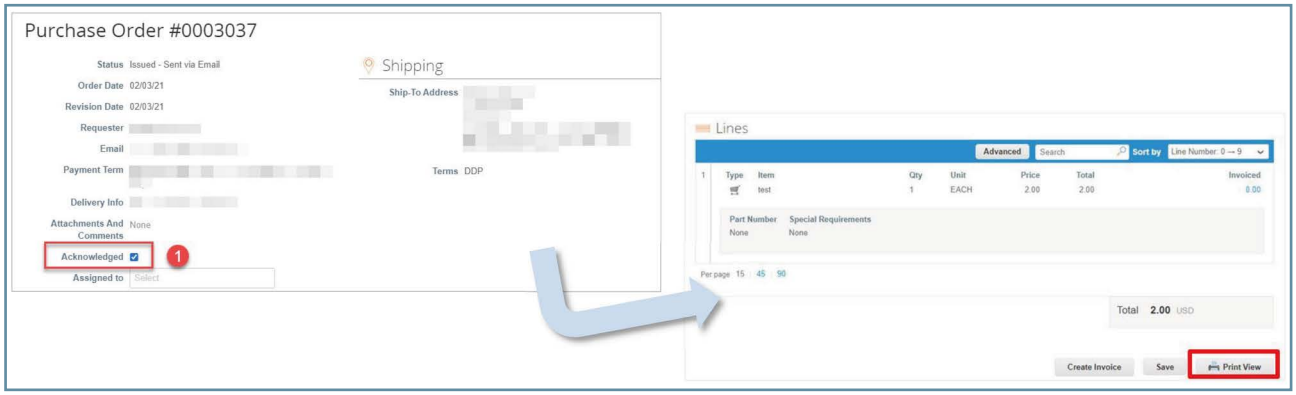


Receive & View Orders *(2/2)*

- 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

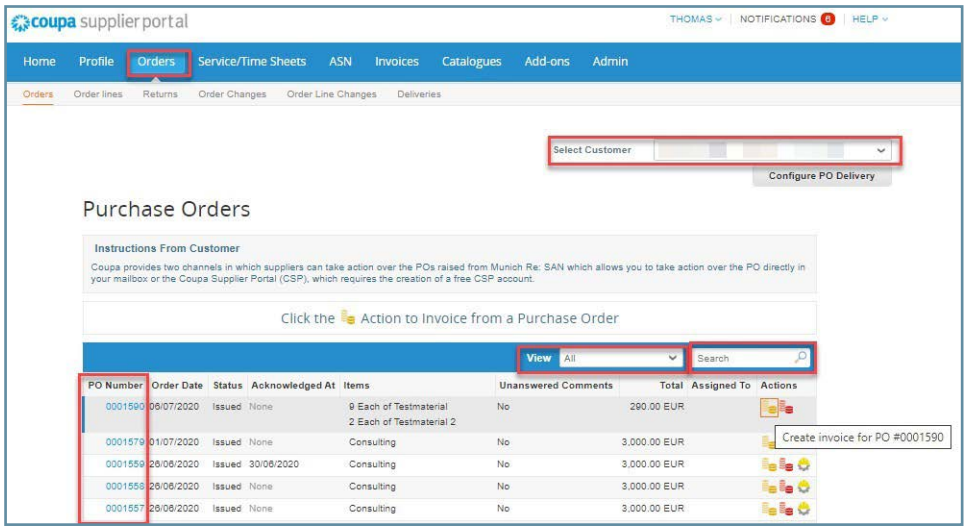
- The page refreshes to display the PO details and shipping address.
- Check the **Acknowledged** box *(1)* to let the requester know that you have received the PO and will act. NÜRNBERGER can see the status update.
  * *If you do not agree with any aspect of the order, please send your concerns or requests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



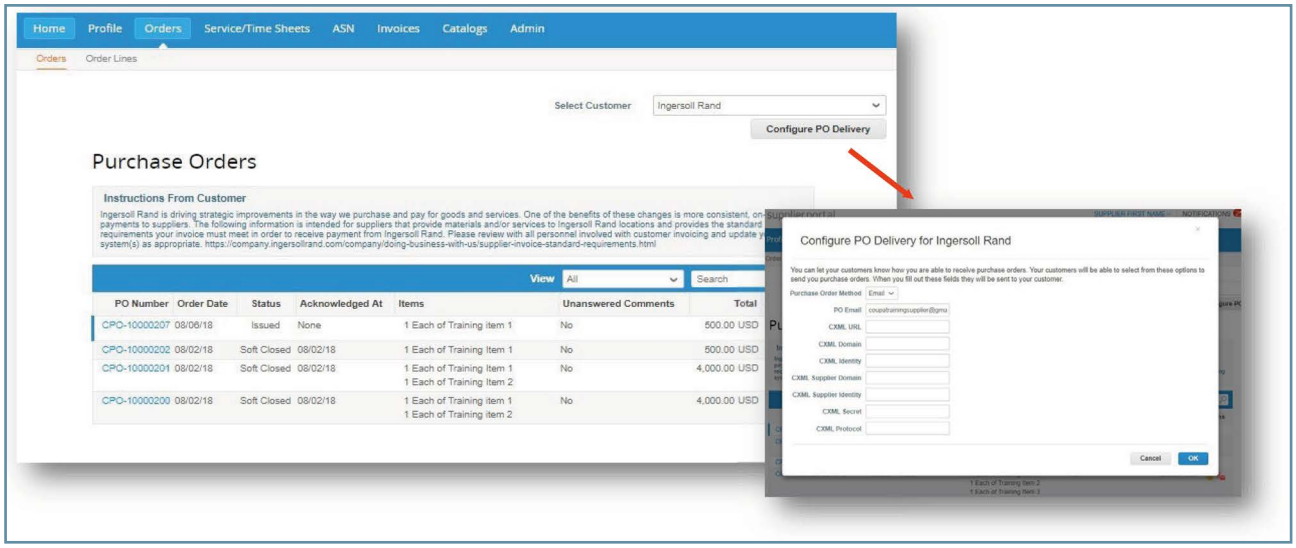
The **Orders** tab at the top of the home page will display all **Purchase Orders** sent by NÜRNBERGER. Use the **Search** functionality to find purchase orders by number. You can sort by column, by clicking on any of the column headers *(PO Number, Status, Acknowledged At, Items, Unanswered Comments,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

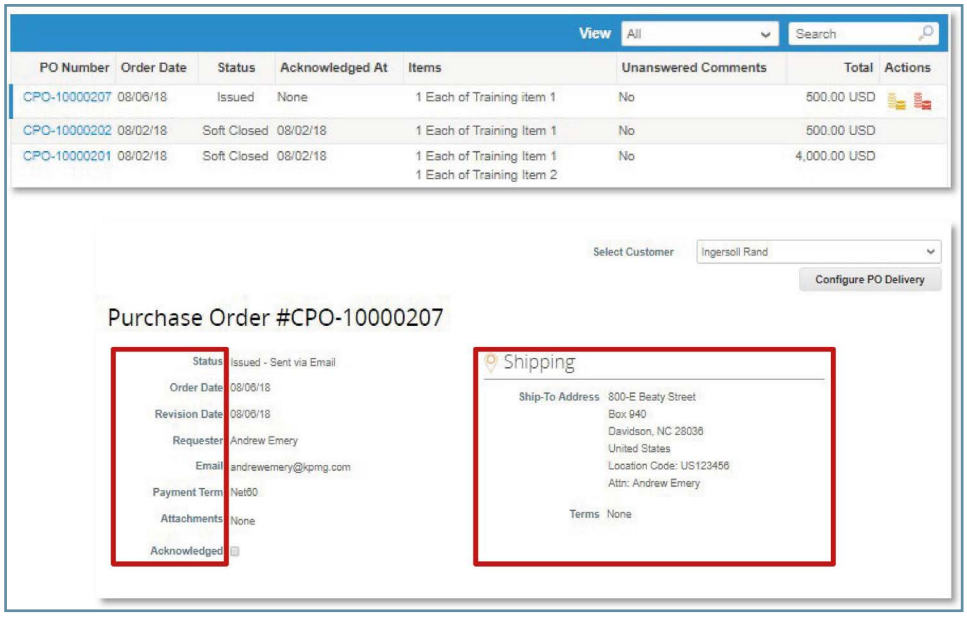


- Set your PO delivery preferences by clicking the Configure PO Delivery button.
- Let us know how you'd like to receive purchase orders by entering an email address or cXML credentials. For cXML requests, please reach out to us.
- When you click on a purchase order blue hyperlink the purchase order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



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!