



SUPPLIER PORTAL QUICK REFERENCE GUIDE

GETTING STARTED WITH THE COUPA SUPPLIER PORTAL (CSP)

For existing G8 Suppliers

WHAT'S COVERED IN THIS GUIDE?

Registering on Coupa:

- Email Invitation to register from G8 Education
- Creating Your Account

Using Coupa:

- Creating your Coupa CSP Account and Profile
- Logging In
- Receiving and Viewing Purchase Orders
- Creating an Invoice for payment
- Where do I go for help?
- Supporting Information for Admins
 - Changing Account Settings and System Notification Preferences
 - Receiving and Viewing Notifications

CREATING YOUR COUPA ACCOUNT

From your email ie 'G8 Education Registration Instructions – Action Required', click [Join Coupa](#)

1. Enter your Business Name, Email Address, Name and Password.
2. Read Coupa's Privacy Policy and Terms of Use. Tick the box to accept the terms.
3. Select **"Create an Account."**

The screenshot shows the 'Create an Account' page on the Coupa supplier portal. The page has a blue header with the Coupa logo and 'supplier portal' text. The main content area is white with a blue border. The title 'Create an Account' is followed by a brief introduction. The form fields are: Business Name (with a red circle '1' next to it), Email, First Name, Last Name, Password, and Confirm Password. Below the password fields is a checkbox for 'I accept the Privacy Policy and the Terms of Use' (with a red circle '2' next to it). At the bottom is a blue 'Create an Account' button (with a red circle '3' next to it). There are also links for 'Already have an account? LOG IN' and 'Forward this to someone'.

CLOSING THE PUBLIC PROFILE SET-UP PAGES

1. Select the 'X' in the top right corner to close this page.

Note: this is an option to complete a *public profile* on the CSP to share your details with Coupa's other customers. **You DO NOT need to complete your public profile to supply goods or services to G8 Education.** Completing your public profile with Coupa does not trigger any entitlement to be paid faster by G8 Education. We will pay you in accordance with our purchase order terms and conditions irrespective of whether or not you complete your public profile on the CSP.

The screenshot shows the 'Your Contact Information' page. The title is 'Your Contact Information' and it is part of a 6-step process (1 of 6). The form fields are: First Name, Last Name, Phone Number, Country/Region (dropdown), Business Address, City, State, and Zip Code. At the bottom is a blue 'Next' button and a link for 'Skip for Now'. A red circle with the number '1' is placed over the 'X' in the top right corner of the form's border.

HOME SCREEN

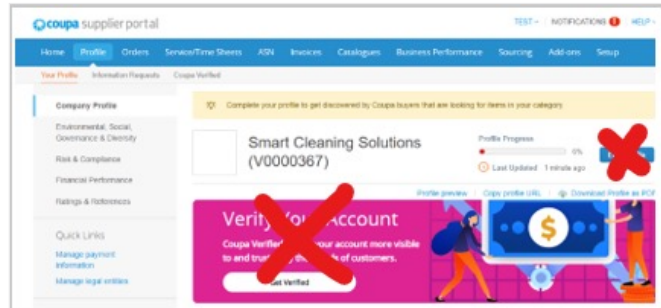


IMPORTANT NOTE:

Please do not action the 'Verify Your Account' section

This is an optional Coupa subscription option that is not required by G8 Education Suppliers.

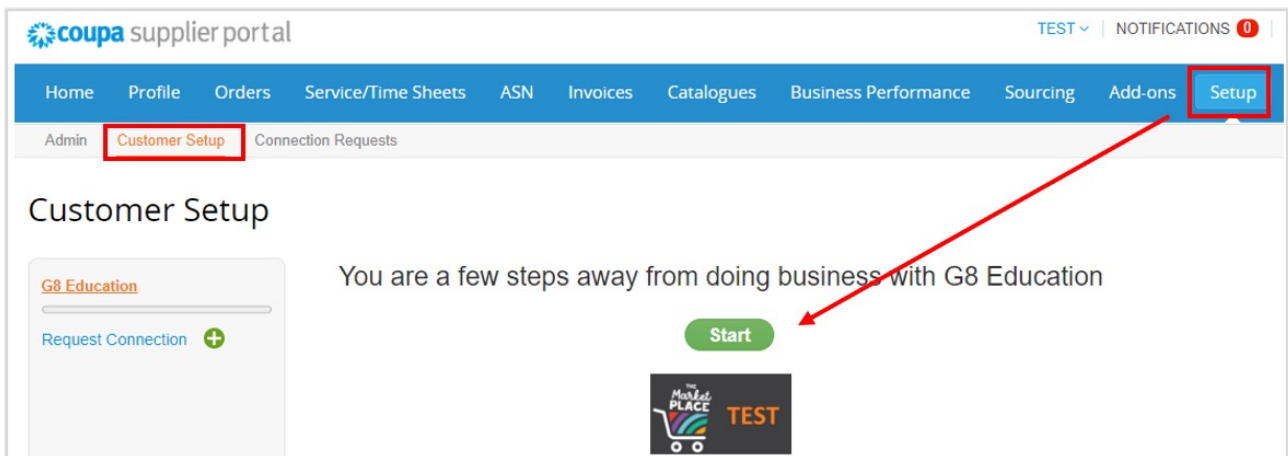
Please do not action Edit Profile



SETUP YOUR PROFILE

Go to **Setup** then **Customer Setup**

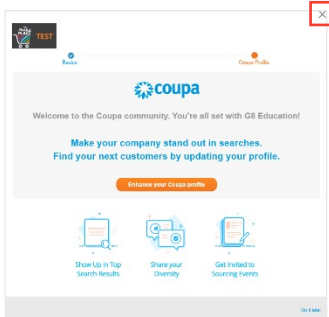
Click on [Start](#)



Complete required fields (shown with an asterix (*)).

Click [Next](#)

Note: if this screen shows up close it down using the X on top RHS (this is the public profile)

A screenshot of the 'Tell us about your business' form. The form includes fields for Company Name, Website, Country/Region (Australia), Address Line 1 (19 Kavanagh Street), Address Line 2, City (MOUNT BARKER), State (SA), and Postcode (5251). There are also checkboxes for 'Also use this address as' (Invoice from location, Pay to location, Dispatch from location) and 'Advanced invoicing' (We support integration for invoicing). A 'Next' button is at the bottom right.

YOU ARE NOW SETUP!

Customer Setup

G8 Education

We have all the basic info we need for you to begin transacting with G8 Education.

[Request Connection](#) +

[Edit your Setup](#)

NOTE:

If you're the first user in your company to register on the CSP, you'll automatically be assigned Admin/Set-Up privileges. You can invite other users within your organisation to connect to the same account.

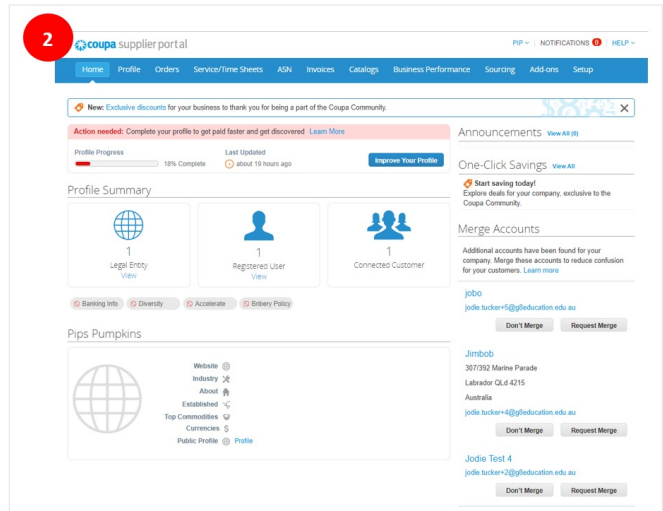
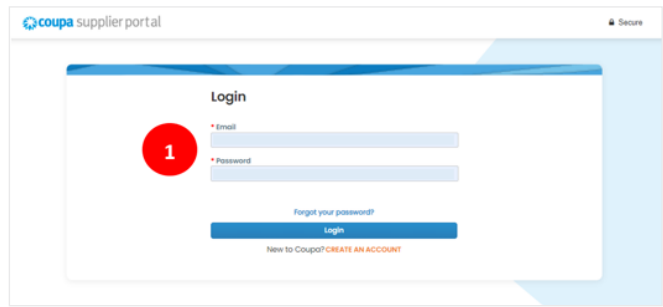
From the Home Screen select Setup/Admin [Invite User](#)

A screenshot of the 'Admin Users' page. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Invoices', 'Catalogues', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there are tabs for 'Admin', 'Customer Setup', and 'Connection Requests'. The main content area shows 'Admin Users' and an 'Invite User' button. A red arrow points from the 'Invite User' button in the text above to the 'Invite User' button in the screenshot.

LOGGING IN

<https://supplier.coupahost.com>

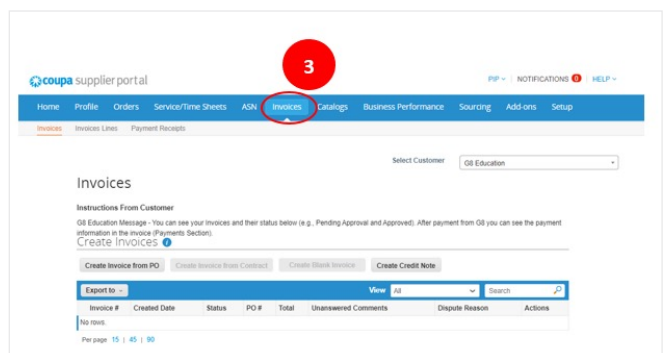
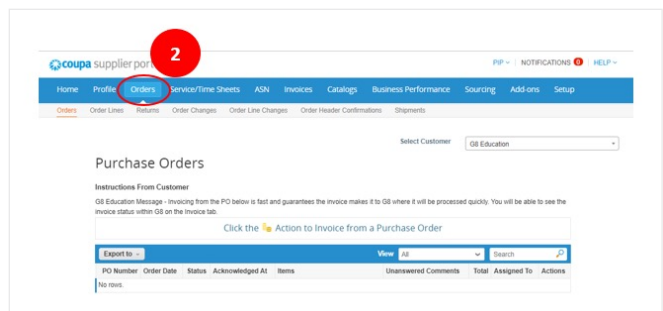
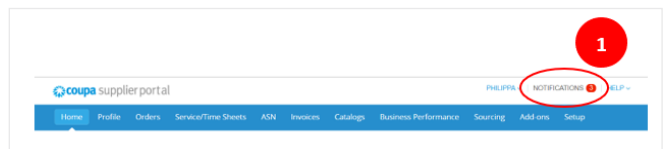
1. Enter your email and password and select 'Login'.
2. You are now on the Coupa Home Screen



THREE (3) OF THE MOST COMMON LINKS YOU'LL BE USING ARE:

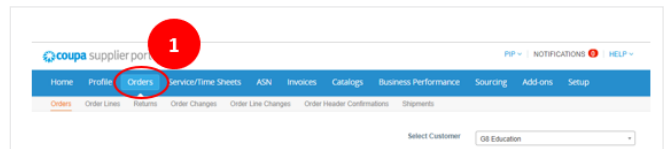
1. Viewing 'Notifications'.
2. Viewing Purchase 'Orders':
3. Creating 'Invoices'.

You'll be learning more about each of these in this guide.



RECEIVING AND VIEWING PURCHASE ORDERS

1. Select 'Orders'.
2. Select the PO Number (blue link) to open and view the Purchase Order.
 - You can check PO details and shipping address.
 - Select the "Acknowledged" checkbox to notify customer that you have received the PO.
 - The "Invoiced" section tells you if some part of the PO has already been invoiced or not (in case of multiple invoices).



Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
GB0081000167426	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP		
GB0041000167427	05/07/20	Issued	None	10 Each of testuk2	No	100.00 GBP		
GB0091000167428	05/07/20	Issued	None	testuk1	No	100.00 GBP		

Purchase Order #PO00000145

General Info

Status: Issued - Pending Manual

Order Date: 9/12/22

Revision Date: 9/12/22

Requester: Diane Powell

Email: diane.powell@fourpl.com.au

Payment Term: None

Attachments: None

Acknowledged

Assigned to:

Shipping

Ship-To Address: 4 Fremar Street
Broadbeach Waters, QLD 4218
Australia
Location Code: E14065
Attn: Diane Powell

Centre Name: None

Terms: None

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Fisher & Paykel 9kg Front Load Washing Machine WH9060J3	3	Each	800.00	2,400.00	0.00

Part Number: WH9060J3

CREATING AN INVOICE FOR PAYMENT

There are two (2) options available to generate an INVOICE against a Purchase Order.

1. **Coupa Supplier Portal (CSP)** - You can create invoices from your purchase orders in the CSP.
2. **SAN (Supplier Actionable Notification) Email** - Using this option, you will receive a Purchase Order via email which allows you to create an invoice directly from the email.



Please refer to the separate QRG Invoice upload guides on our website.

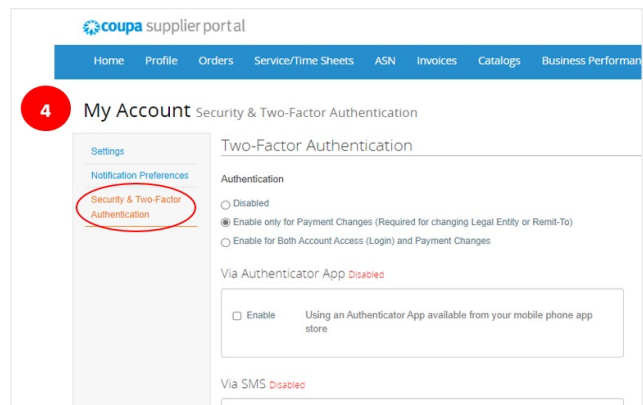
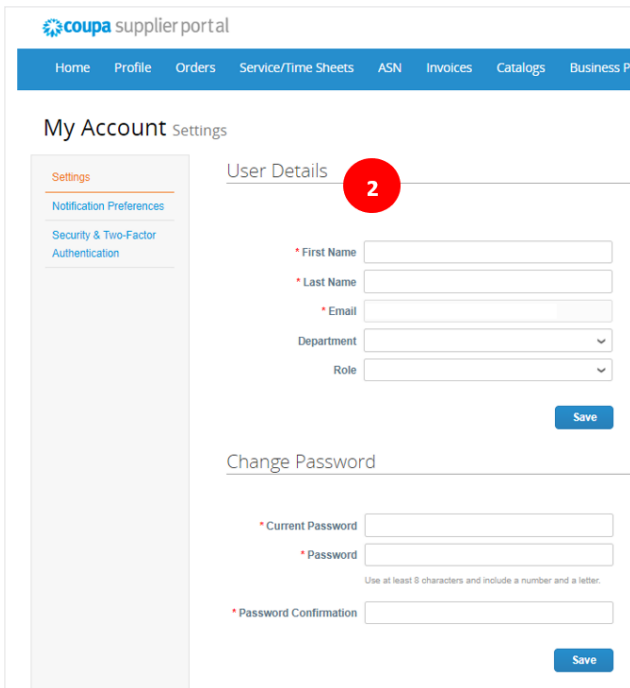
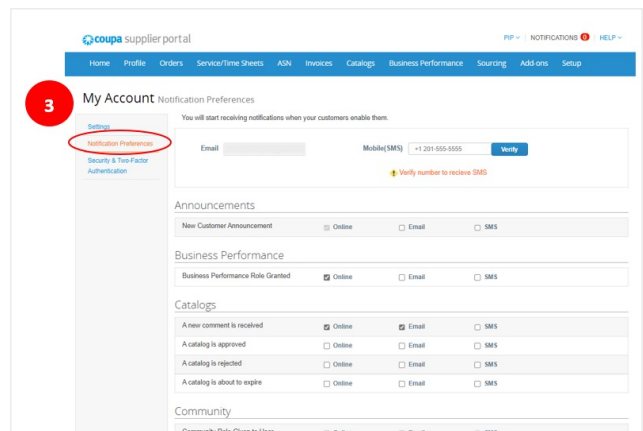
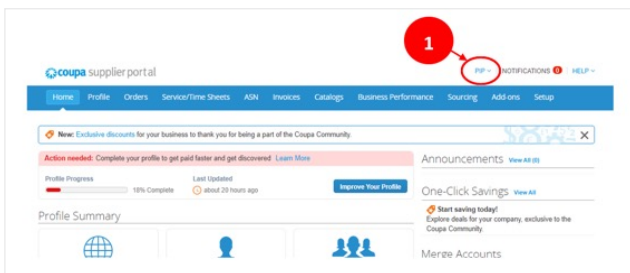
WHERE DO I GO IF I NEED HELP?

- For all system content and operational/user enquiries, email:
themarketplace@g8education.edu.au
- For technical assistance with Coupa go to: **supplier.coupa.com/help/** - if you cannot find an answer there, use the online **Chat with Coupa Support**

SUPPORTING INFORMATION FOR ADMINS

CHANGING ACCOUNT SETTINGS AND SYSTEM NOTIFICATION PREFERENCES

1. Select your Name (top right-side of screen).
2. Your Account Setting page will be displayed.
All your User Details (except your email address) can be changed on this page.
From this page, you can also:
3. Change your 'Notification Preferences'.
4. Set up 'Security and Two-Factor Identification' (optional).



RECEIVING AND VIEWING NOTIFICATIONS

1. The notifications tab will be flagged by a red circle with a number telling you how many notifications you must view.
2. Select 'Notifications' for a quick view. Only the three most recent notifications will be displayed in the drop-down box.
3. To see all notifications, select 'See All Notifications'.
4. The 'My Notifications' page will be displayed. Select the blue links to open and view each of your notifications. You can also 'Mark as Read' and 'Delete' notifications from this page.

