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

G8 Education ltd

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."**

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.
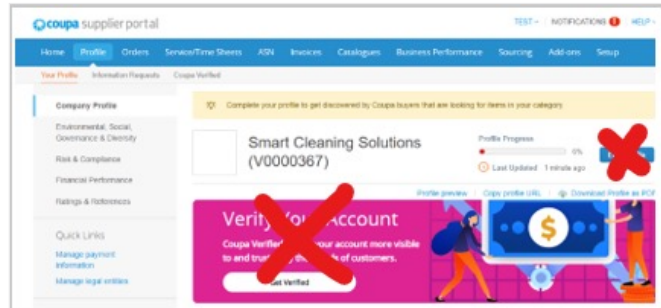
HOME SCREEN

IMPORTANT NOTE:

Please do not action the 'Verify Your Account' section

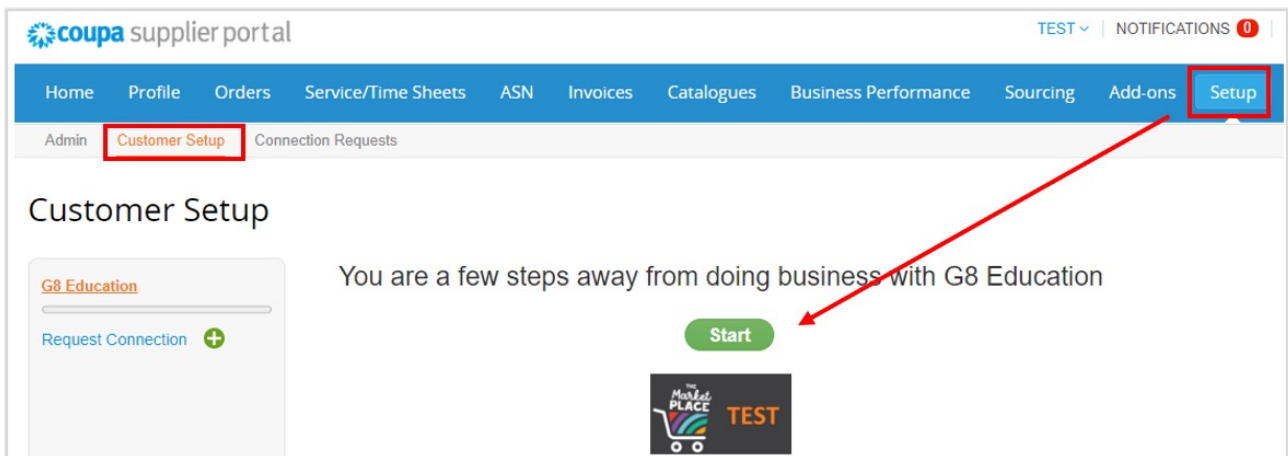This is an optional Coupa subscription option that is not required by G8 Education Suppliers.

Please do not action Edit Profile

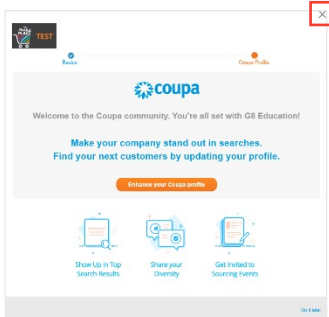# SETUP YOUR PROFILE

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)

YOU ARE NOW SETUP!

Customer Setup

G8 Education

Request Connection +

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

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.
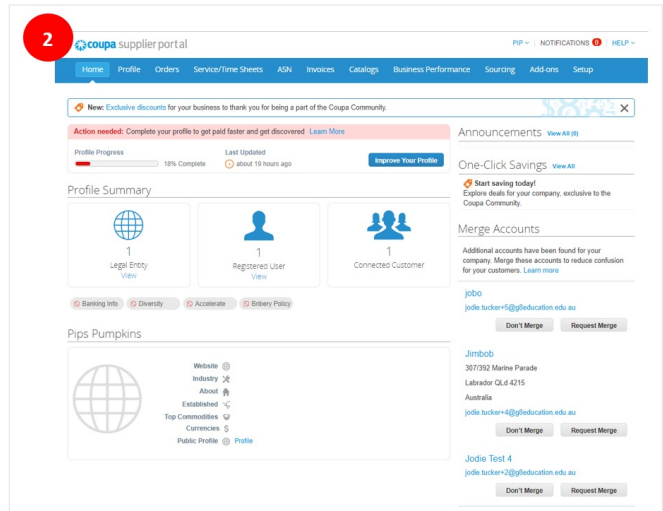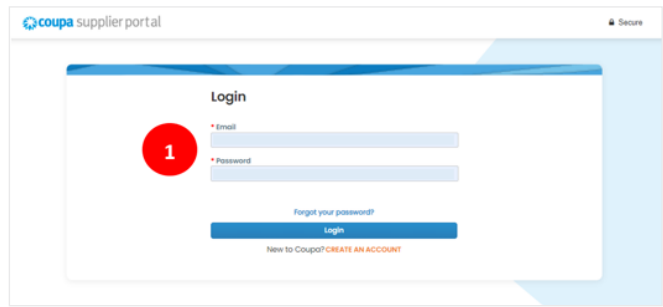
From the Home Screen select Setup/Admin **Invite User**

| Home | Profile | Orders | Invoices | Catalogues | Sourcing | Add-ons | Setup |

Admin   Customer Setup   Connection Requests

Admin Users

Invite User

LOGGING IN

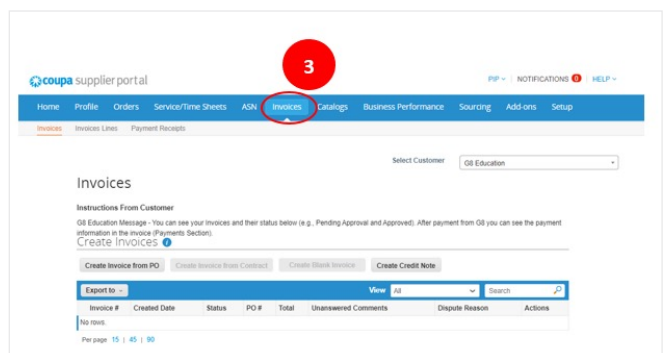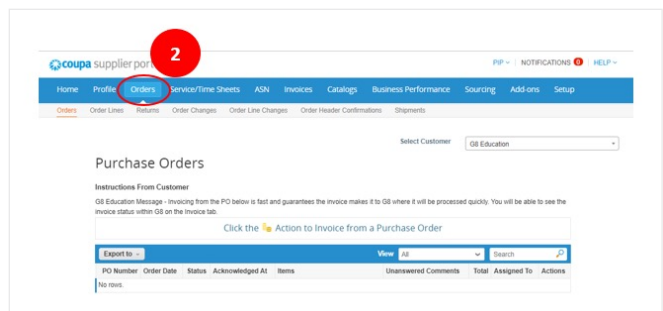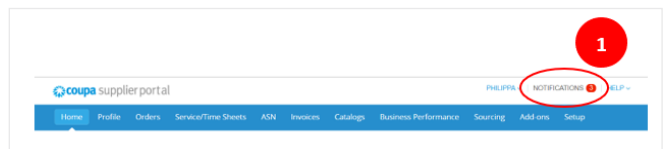*https://supplier.coupahost.com*

1. Enter your email and password and select 'Login'.

2. You are now on the Coupa Home Screen

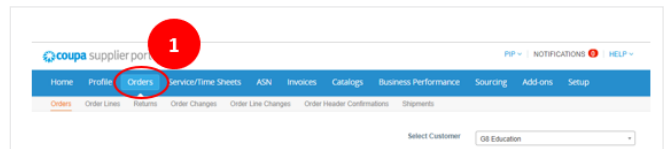## THREE (3) OF THE MOST COMMON LINKS YOU'LL BE USING ARE:

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).

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).
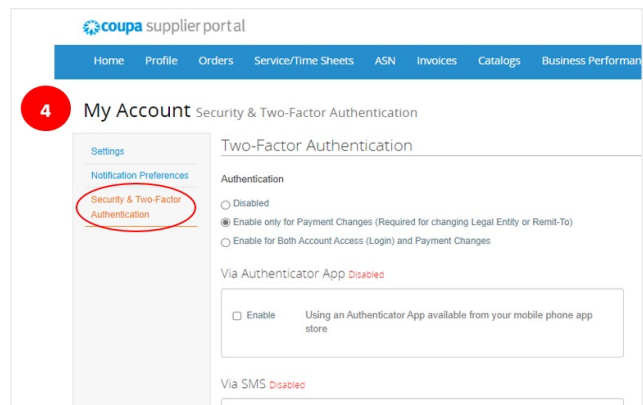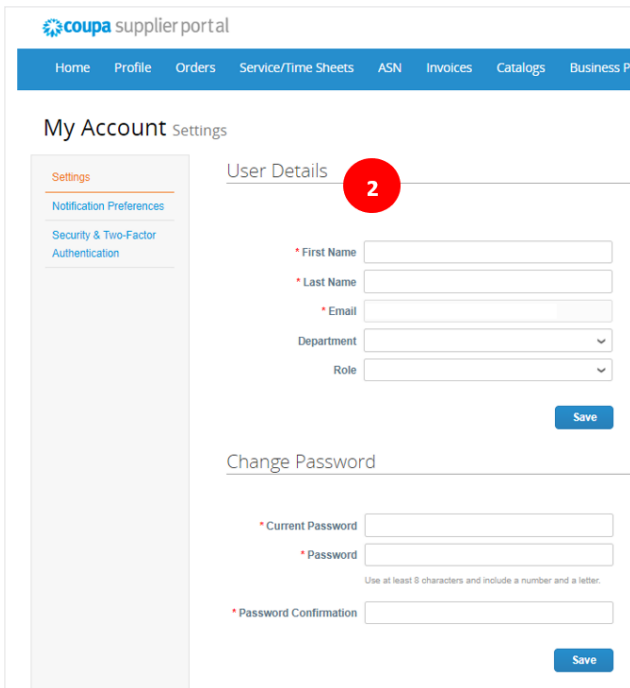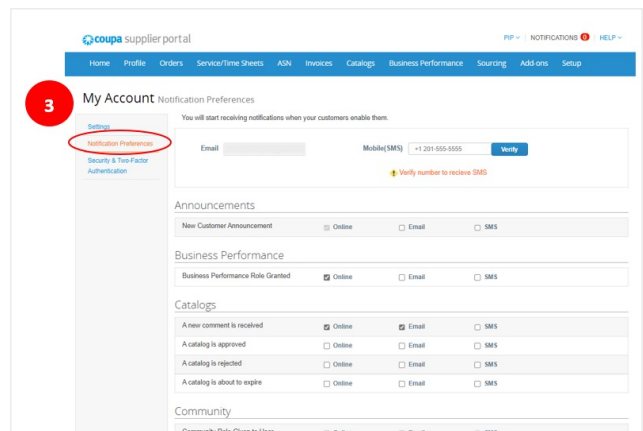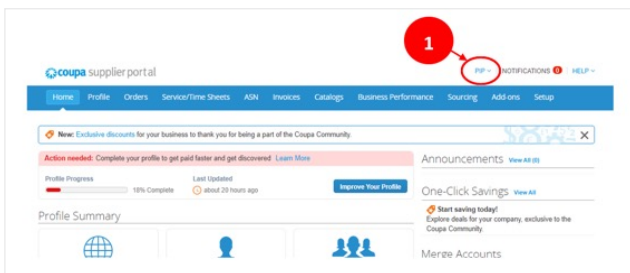
RECEIVING AND VIEWING NOTIFICATIONS

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.