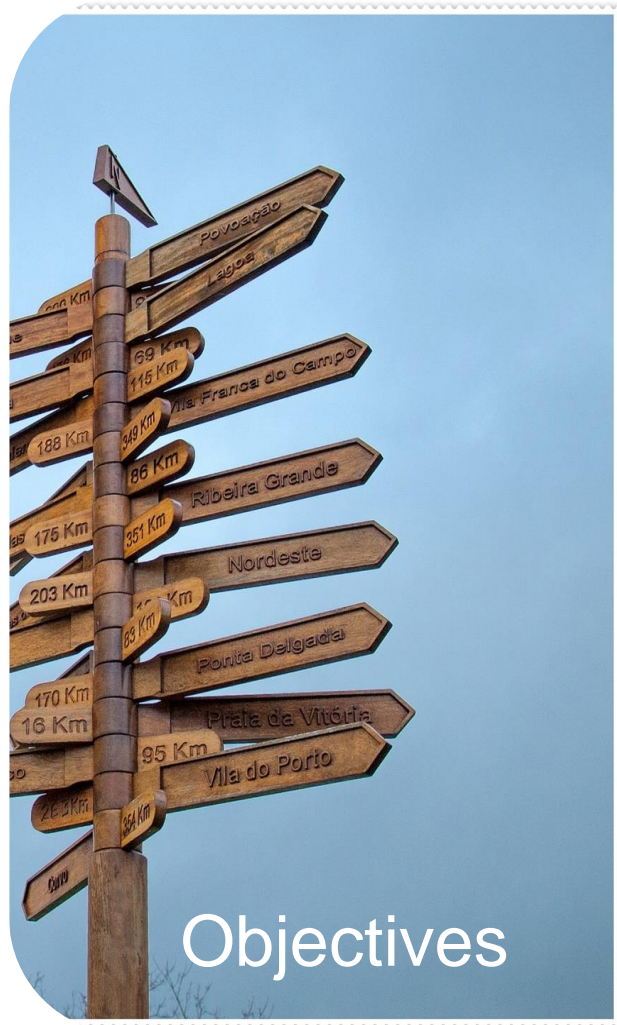*Focusing on our core utility businesses*

Coupa Supplier Portal Training Guide – Suppliers

CenterPoint Energy

Learning Objectives

This training introduces Coupa navigation for Suppliers.

By the end of this session, you will be able to:

1. Log in and navigate the Coupa Supplier Portal
2. Receive POs
3. Request a PO change
4. Submit invoices
5. See payment status

Objectives

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Overview: Coupa Supplier Portal (CSP)

Overview: Coupa Supplier Portal (CSP)

The Coupa Supplier Portal (CSP) is a free tool for you to easily do business with customers who use Coupa. Using the CSP, you can:

- Manage your company information

- Configure your company PO transmission preferences for each customer

- Create online catalogs for each customer

- View POs from all your connected customers who use Coupa

- Acknowledge purchase orders

- Flip and send invoices directly in Coupa

- Exchange real-time transactional notes with customer

Accepting an Invitation to the CSP

Accepting an Invitation to the CSP

After you receive an invitation to join Coupa Supplier Portal

1. Click on **Join Coupa**.
   Note: This email can also be forwarded to other members of the company.

2. Set up your password. Click **Get Started.**

3. Fill out the relevant information for your company. Click **Next**.

4. Complete your profile.
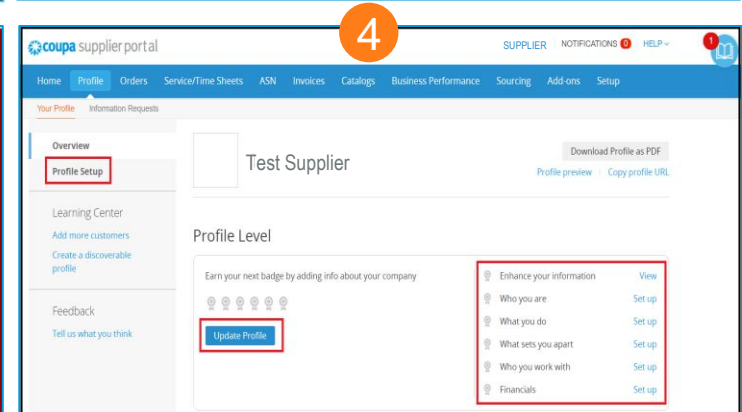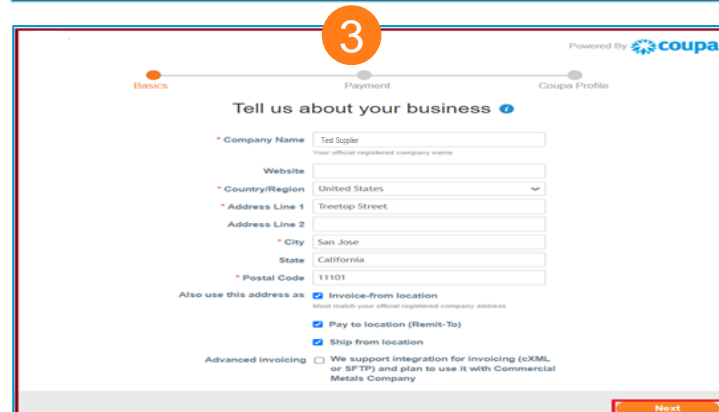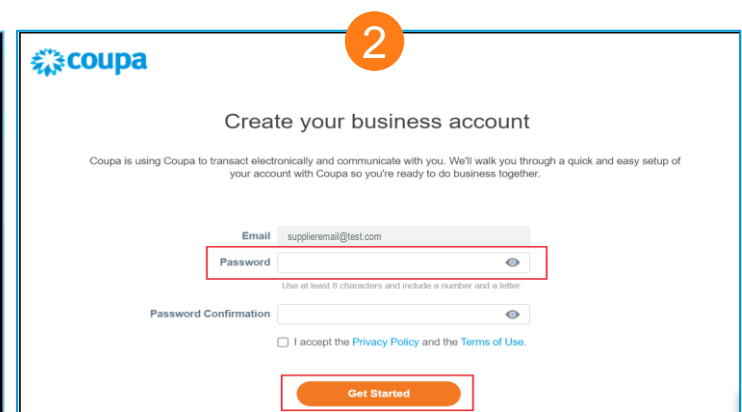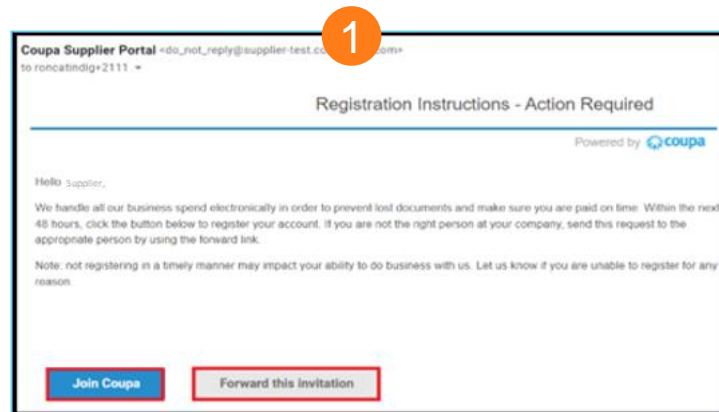
Note: you may be prompted to join Coupa Advantage for a fee. This is not required to complete your profile or to transact with CenterPoint Energy.

Connecting an Existing CSP Account to CenterPoint Energy

Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.

1. Upon receiving the notification from Coupa, click **Login to Coupa**.

2. Coupa Supplier Portal page will be displayed. Enter your credentials and click **Login**.
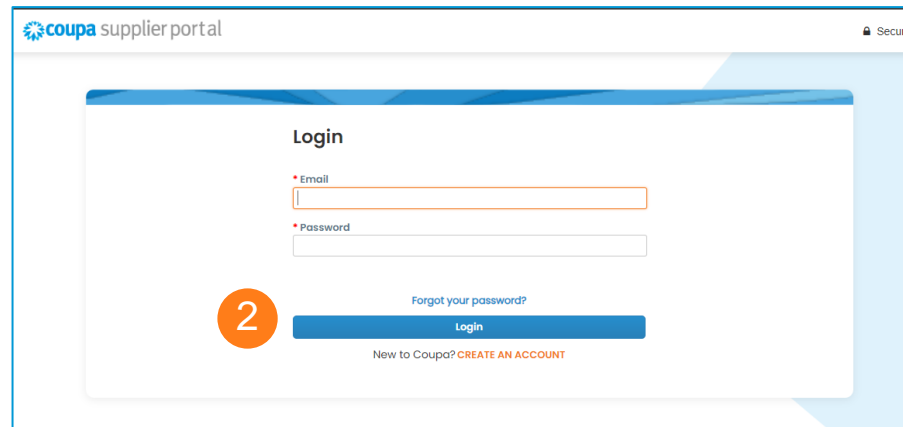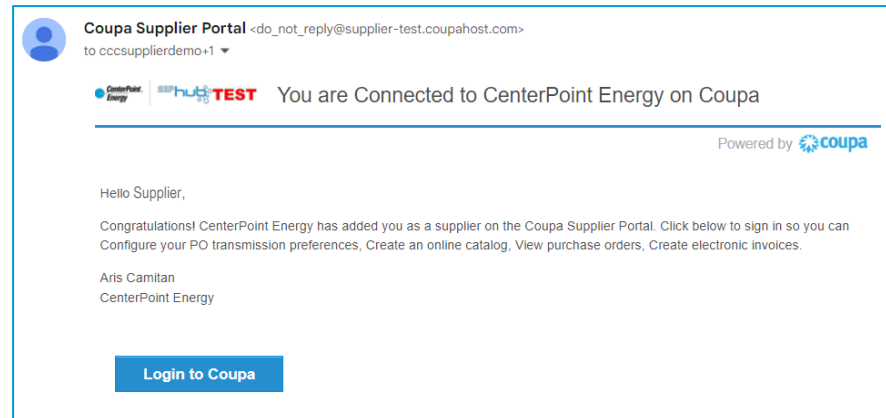
Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.

3. Once login credentials are setup, CenterPoint Energy will be added in your customer access list automatically.

4. Click Customer Setup.

5. Choose CenterPoint Energy's profile and complete the steps to finish the setup. Click **Start**.
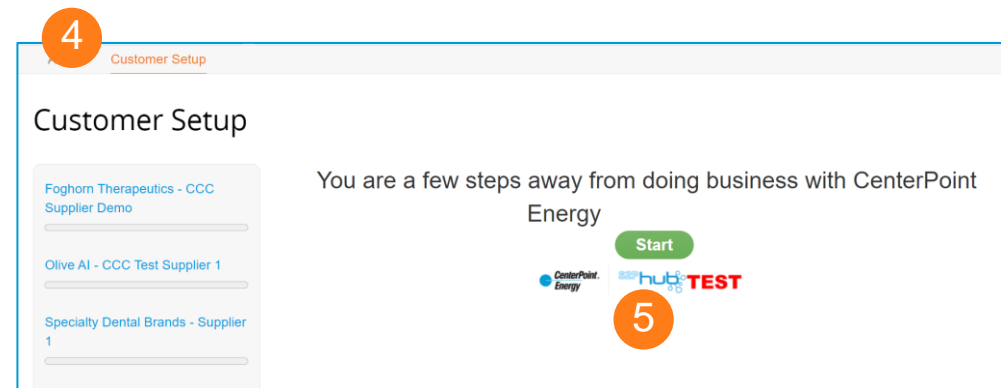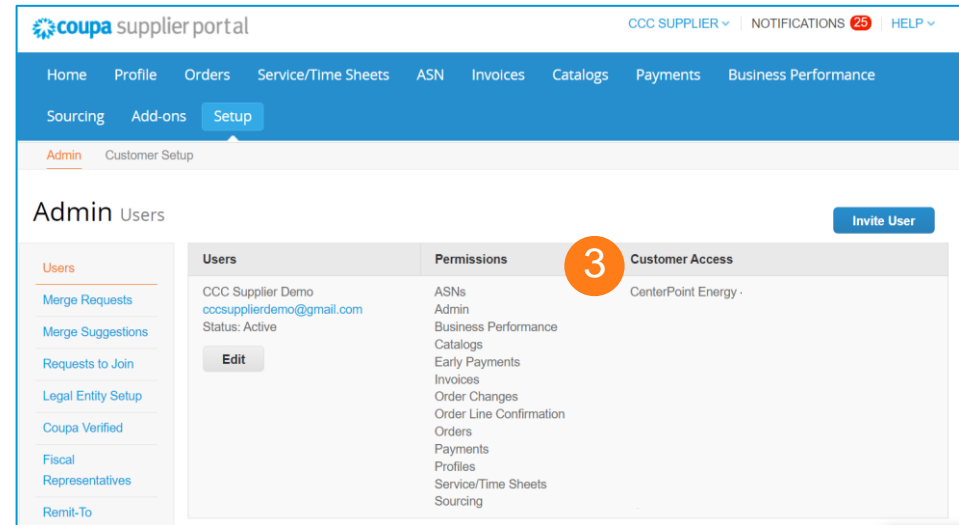
Connecting CenterPoint Energy to Current CSP Account

6. Confirm the Invoice-from Location, Ship-to from, etc.. Once done, click **Next**.

7. Finish the setup until steps are completed and click **Finish**.

Self-Service Management of Contractor Users/Access to Coupa Supplier Portal

Management of Your Company's CSP User Access

As your organization changes, you have the ability to manage what users have access and what kind of access to the CSP. From the **Setup > Admin > Users** Tab the steps are below

1. Click the **Invite User** button to bring up the invitation form.

2. Populate the Name and Email of the co-worker.

3. Further review and adjust which Permissions they require.

4. Review the Customer who that user should support.

5. Once completed, an email will be sent to the user to accept and **Join Coupa Supplier Portal**
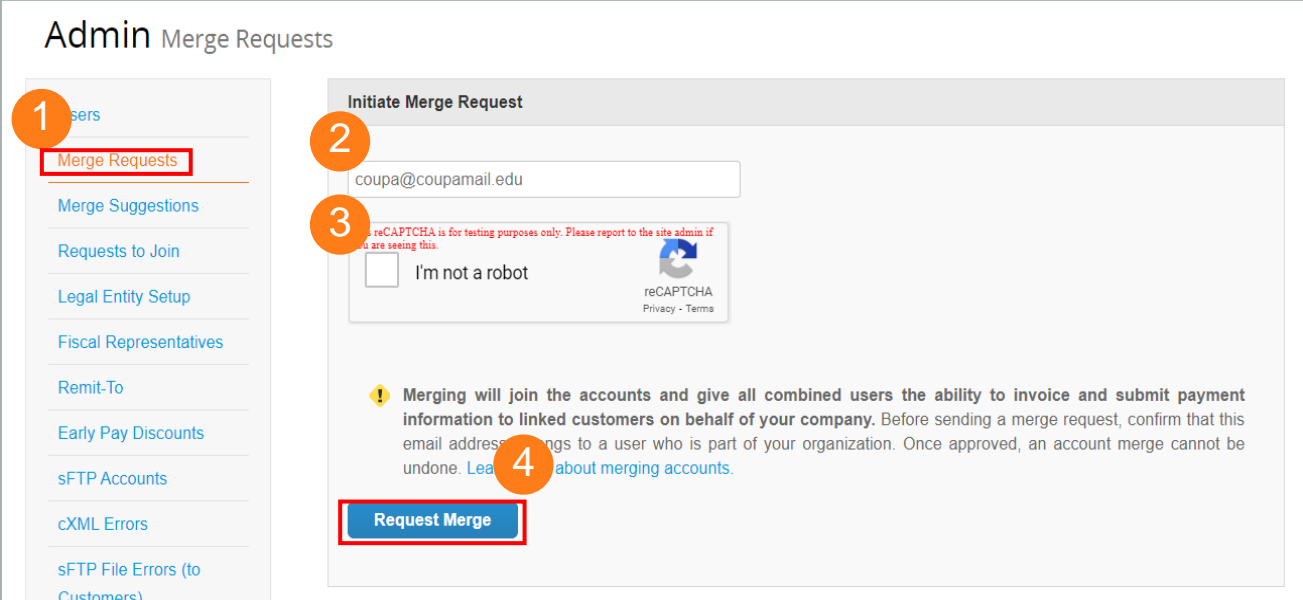
Combining/Linking Account

It is possible that your company has multiple entities in CenterPoint's systems, this may result in multiple invites to the CSP. You can merge accounts if desired to simplify and reduce logins. From the **Setup > Admin** Tab follow the steps are below:

1. Select **Merge Requests**

2. Enter the email address of the user who was invited to the CSP which you wish to merge.

3. Complete the CAPTCHA

4. Click the **Request Merge** button.

Managing Notifications

CSP - How to Manage Notifications

1. After logging in, hover your mouse over your name. Click Notification Preferences.

2. Click the type of notifications that you want to enable or disable.

3. Click Save.
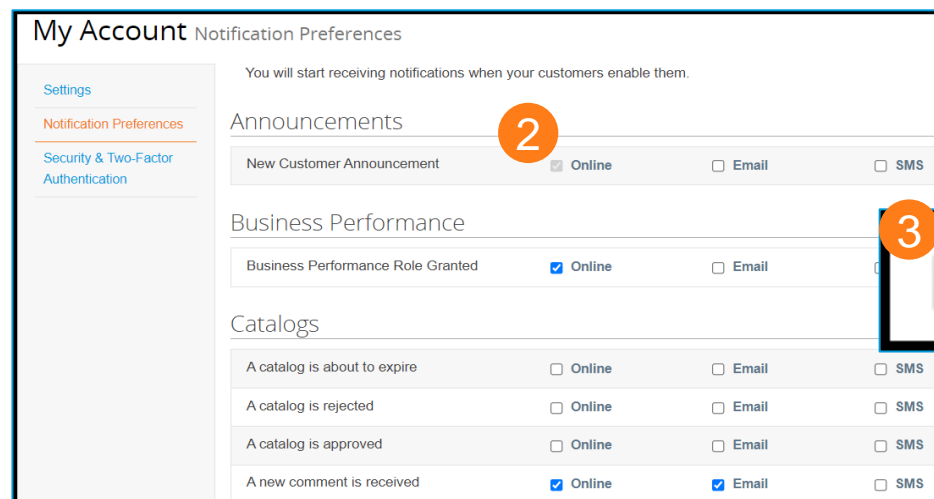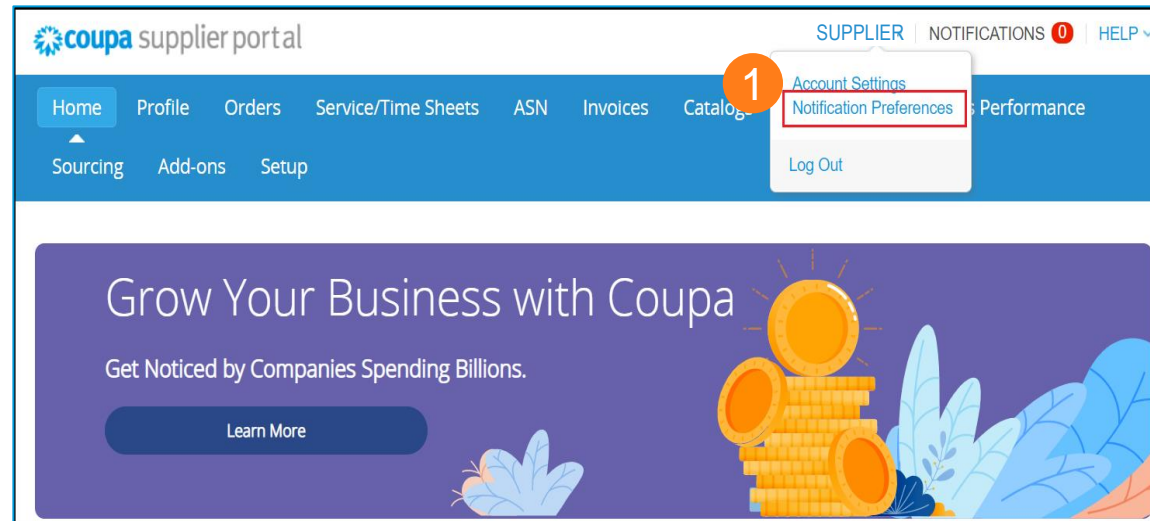
General Navigation

General Navigation

1. Login with your email and password.

2. Click on Profile to complete your company's relevant information.

3. POs and PO lines can be found via the Orders tab. You may create invoices and credit notes from POs on this page.

4. The Orders tab has several subtabs: Orders, Order lines, Order Changes, and Order Line Changes.
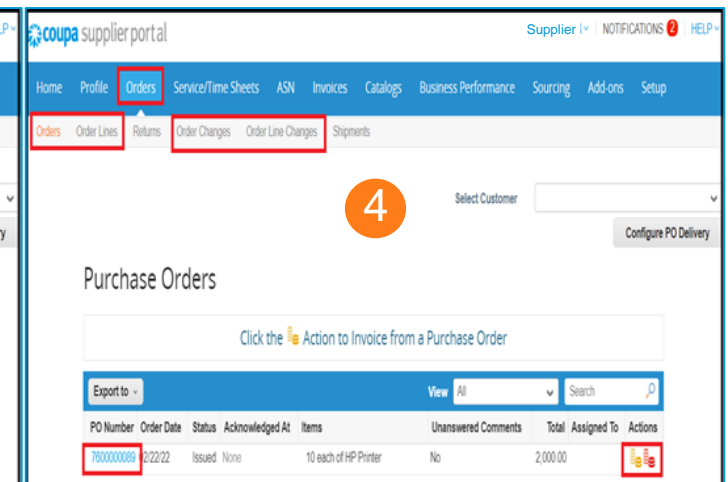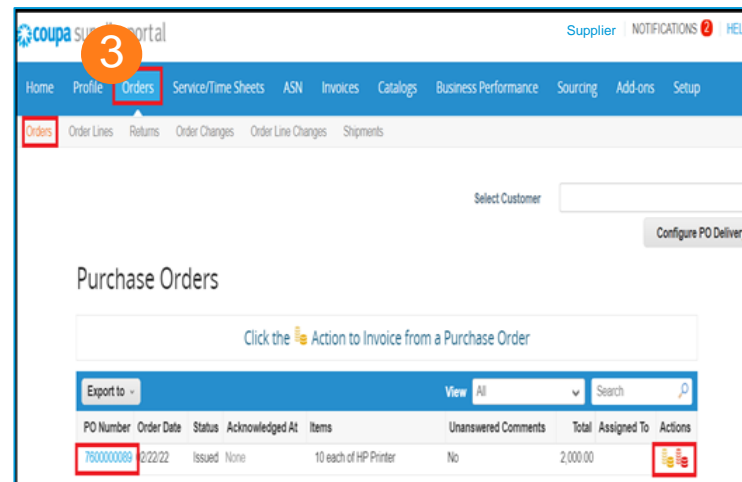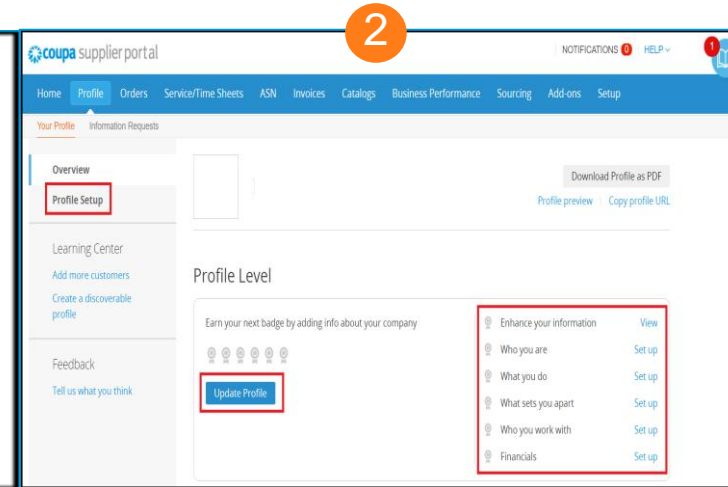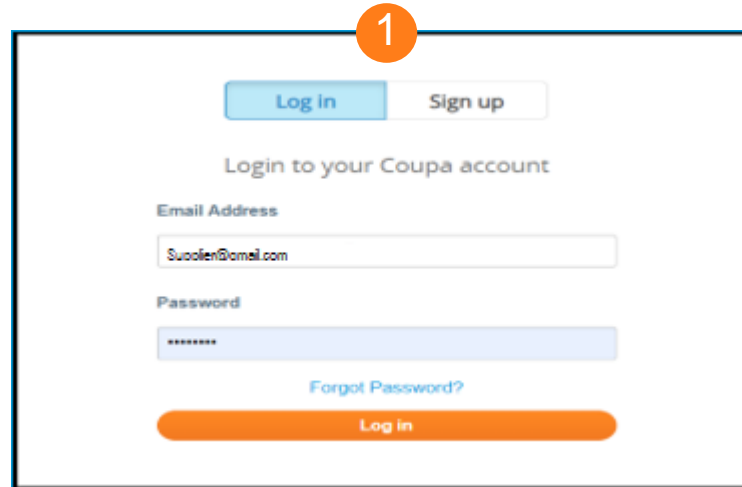
General Navigation

5. Invoices and invoice lines can be found on the Invoice tab. Invoices and Credit Notes can be created from this page.

6. Hosted catalogs can be viewed and maintained via the Catalog tab.

7. The Setup tab is where to manage legal entities, remit-to addresses, and other users within your organization.
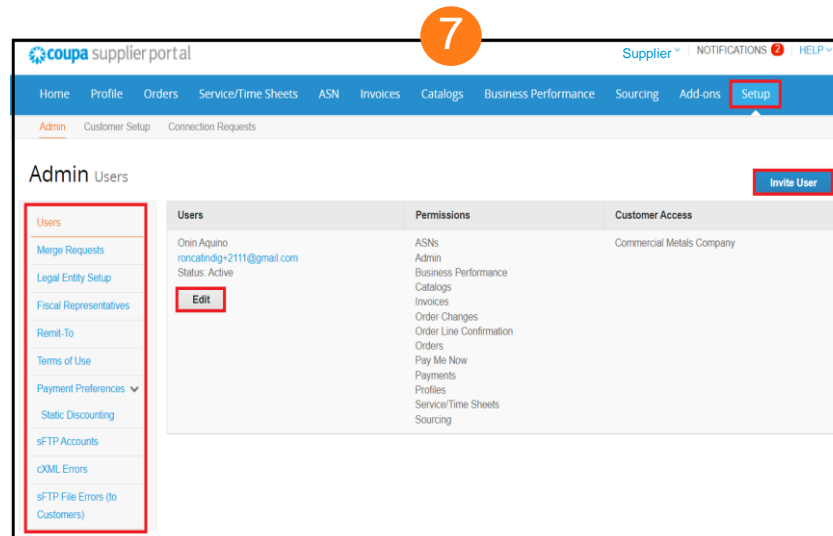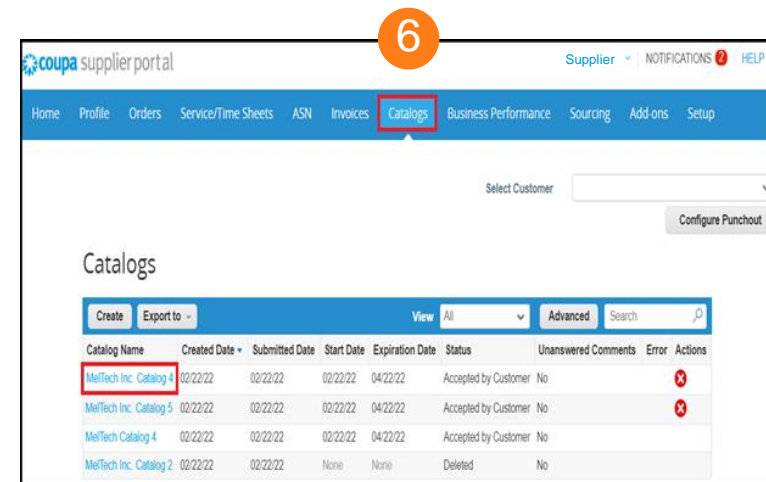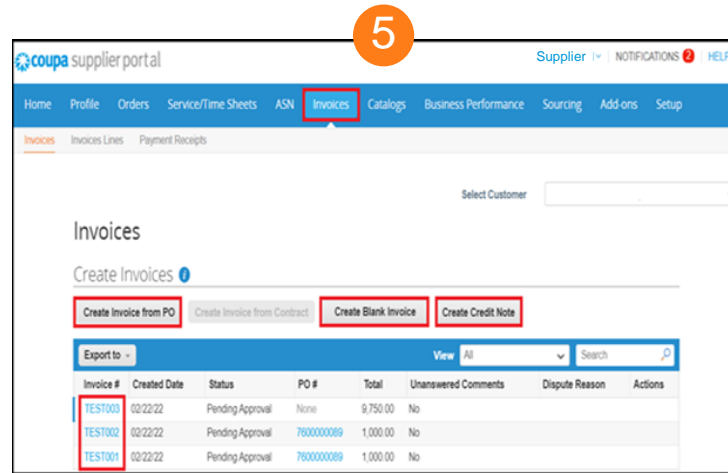
General Navigation

Suppliers may have multiple users within their organization. This is common when multiple customers use Coupa.

1. To add or manage users, click the **Setup** tab.

2. Click **Invite User**. A popup will appear. Clicking **Edit** on an existing user open the same popup.

3. Enter the user's first name, last name, and email address. Check or uncheck permissions and/or customers to manage users' access.

4. Click **Send Invitation**.

*Note: if editing an existing user, name and email will be prefilled in the popup, and the blue button will read **Save** instead of **Send Invitation**.*

Responding to Sourcing Events (Suppliers)

Responding to Sourcing Events (Suppliers)
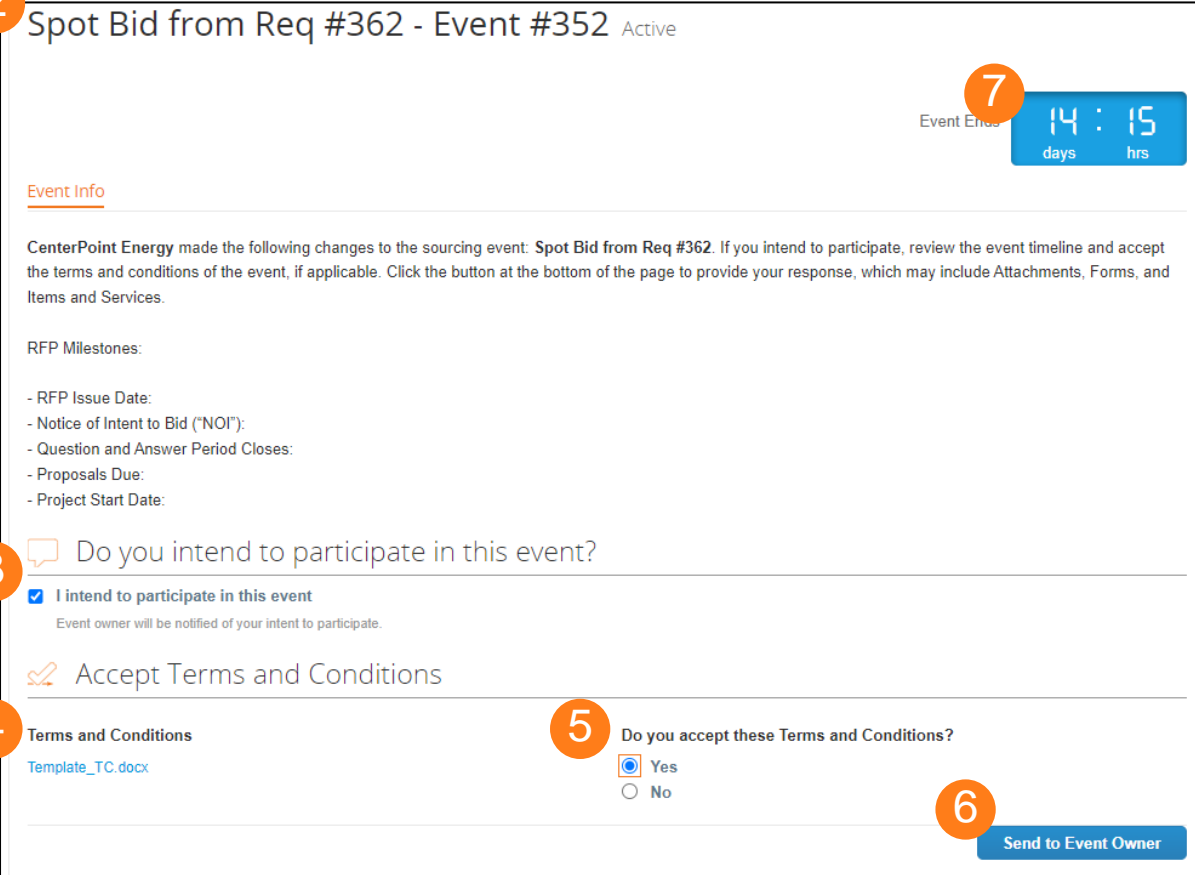
Suppliers will receive email notification when invited to a sourcing event. The notification will contain details of the buying need.

1. Click **View Event** in the email notification to be taken to the sourcing event in a new window. A one-time verification code will be sent to your email, please enter that code in order to view the Event Info page.
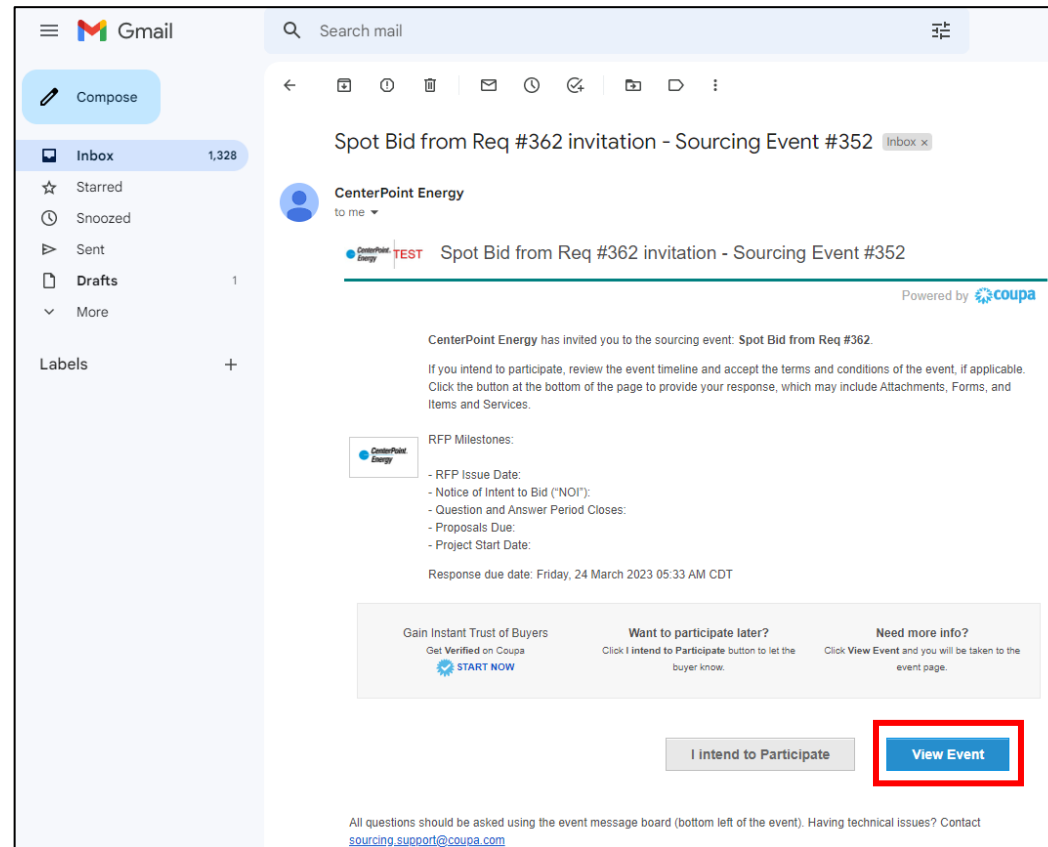
Responding to Sourcing Events (Suppliers)

2. The Event Info page will open. This page will include details of sourcing event, the status of the sourcing event, and a few short questions.

3. Check the **checkbox** next to "I intend to participate in this event if you plan to participate.

4. Download and review the **Terms and Conditions**.

5. Select Yes or No to accept or decline the Terms and Conditions.

6. Click **Send to Event Owner**. From this point, the Event Owner will receive your response and may award business to the winning response from those received.

7. The time remaining before the event closes will be displayed in the top-right of the screen.

2 Spot Bid from Req #362 - Event #352 Active

7 Event Ends 14 : 15 days hrs

Event Info

CenterPoint Energy made the following changes to the sourcing event: **Spot Bid from Req #362**. If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the button at the bottom of the page to provide your response, which may include Attachments, Forms, and Items and Services.

RFP Milestones:

- RFP Issue Date:
- Notice of Intent to Bid ("NOI"):
- Question and Answer Period Closes:
- Proposals Due:
- Project Start Date:

3 Do you intend to participate in this event?

☑ I intend to participate in this event
Event owner will be notified of your intent to participate.

Accept Terms and Conditions

4 Terms and Conditions
Template_TC.docx

5 Do you accept these Terms and Conditions?
◉ Yes
○ No
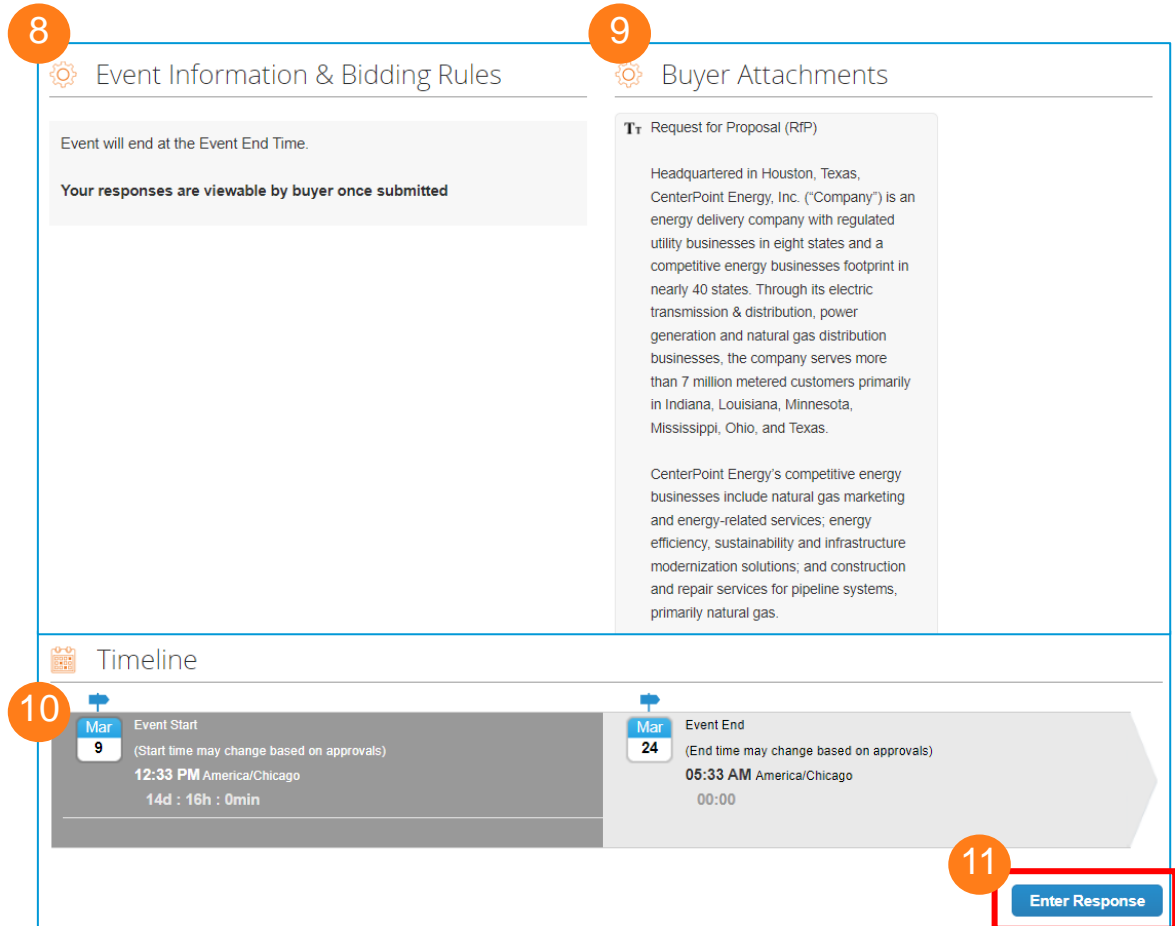
6 Send to Event Owner

Responding to Sourcing Events (Suppliers)

Response details can be entered at the bottom of the Event Info page. After clicking **Send to Event Owner**, the **Enter Response** button will become available.

8. Review any details in the **Event Information & Bidding Rules** section.

9. Download and read any attachments provided by the Buyer.

10. Review the sourcing event timeline.

11. Click **Enter Response**.

Responding to Sourcing Events (Suppliers)

After clicking **Enter Response**, the supplier will be able to enter the details of event response.

12. Enter a **Name** of the Response.

13. Review any attachments or instructions.

14. Your response to the Terms and Conditions will be listed.

Spot Bid from Req #362 - Event #352 Active

Event Ends **14 days 15 hrs**

Event Info   My Responses   Aris Supplier Ltd - #244

12 Name [   ]
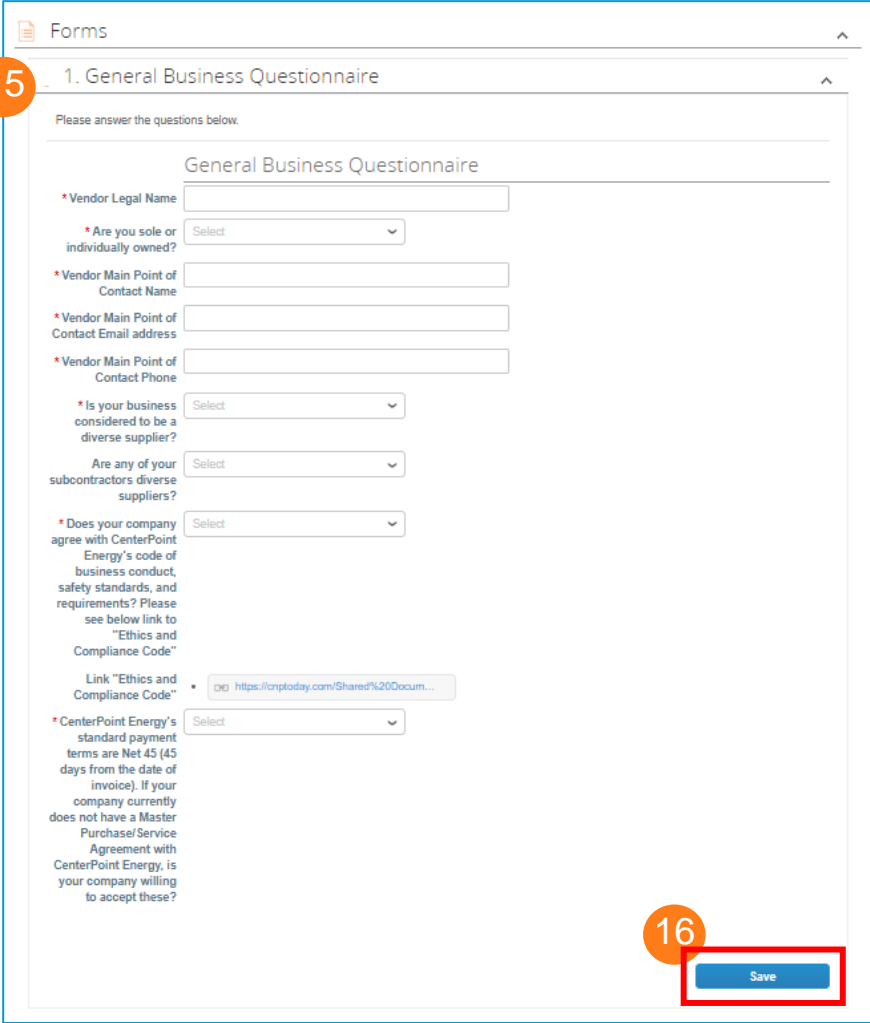
📎 Attachments ⌄

13 **Provided by Aris Camitan**   **14** **Your response**

Contract T&Cs

Instructions
Each respondent must submit a mark-up, in redline format, of the attached pro forma agreement, which must include all requested modifications to the pro forma agreement with respect to this Sourcing Event. The electronic copy of the mark-ups must be provided in a format capable of being opened in Microsoft Word. Respondent may also respond with any currently active and applicable agreement that it has in place with CenterPoint. CenterPoint reserves the right to determine the applicability of said agreement.

Attachment
None

Response to Contract T&Cs

Attachment *
Add File

Responding to Sourcing Events (Suppliers)

Below the attachments and Terms and Conditions, there may be a Form to complete requesting specific information from the supplier. This screenshot shows the General Business Questionnaire.

15. Complete the required (*) fields.

16. Click **Save.**

Responding to Sourcing Events (Suppliers)

The final section of the sourcing event response page is the Items and Services section, where any included items or services will be listed.
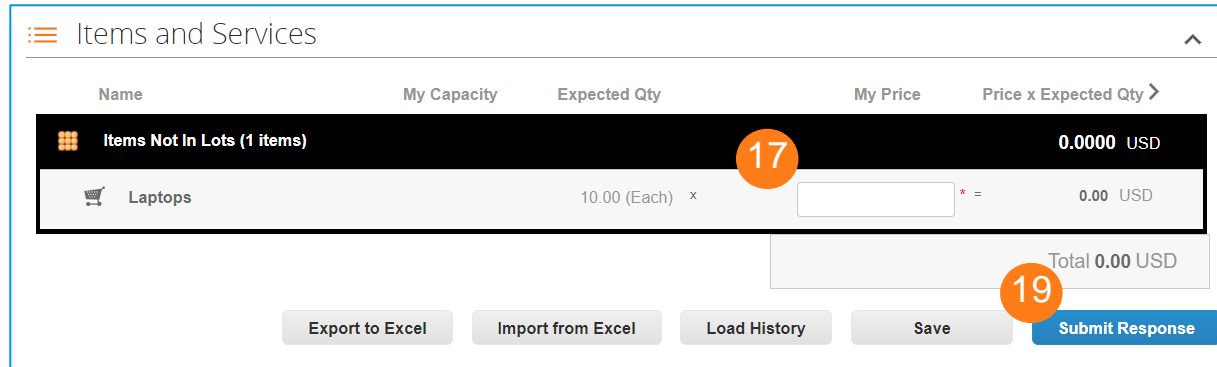
17. Fill in the price and other required information for each line.

18. If required, expand the full item details by clicking on the line item. Click **Save Item** to save item details.

19. Click **Submit Response**. You may save the response without submitting by clicking **Save**.

*Note: for sourcing events with multiple items, services, or lots, you may use the bulk load function to streamline the event response. Click **Export to Excel** to download the items in an Excel template. Fill in the required details and save the file, then click **Import from Excel**.*
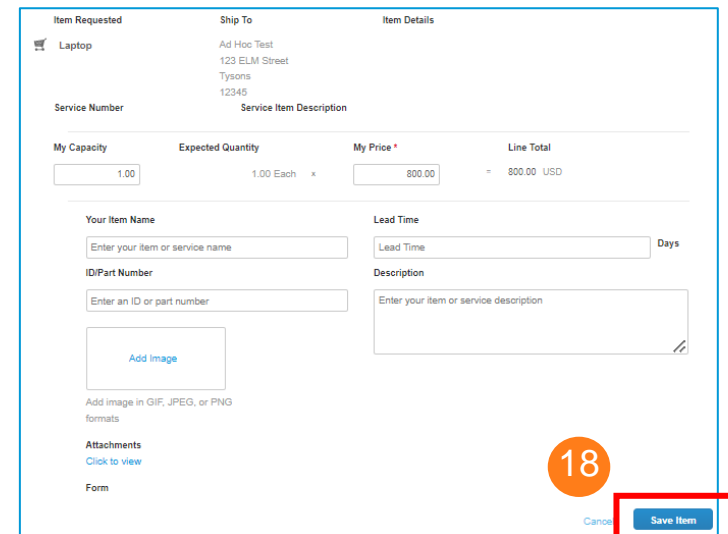
Receiving PO (CSP and Email)

Receiving POs (CSP and Email)

Orders are sent to suppliers through at least one of several transmission methods. The most common method is via email. POs will also be visible in the Orders tab regardless of transmission method.

1. When receiving a PO via email, the notification will contain high level details of the order, along with the option to take PO actions directly. Note: Suppliers will not be able to create invoices via email and must submit invoices from within the CSP.

2. When accessing a PO through the CSP, navigate to the **Orders** tab.

3. Use the search bar to find specific POs as needed.

4. Click the **PO number** to open the PO to see full details.
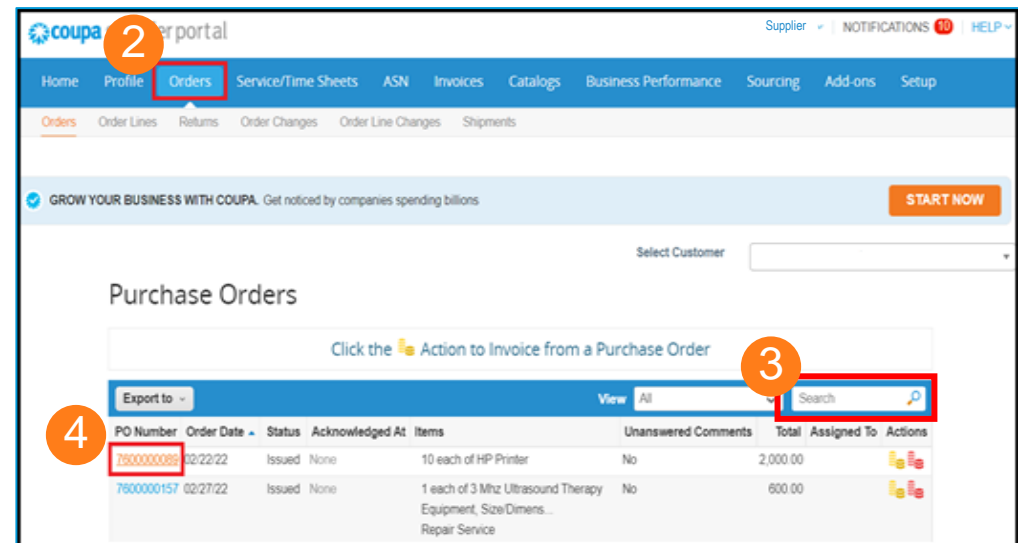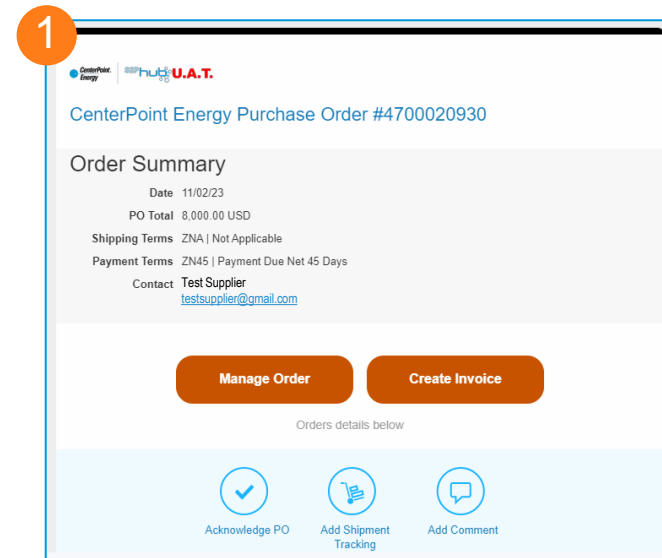
Acknowledging a PO

Acknowledging a PO

1. Click on the **Orders** tab to access current POs.

2. Click on the **PO Number** to open the full PO.

3. Check the **Acknowledged** checkbox to acknowledge the PO.

Note: POs can be acknowledged directly from the email notification. See screenshot on previous slide.

Sending Shipping Notice

Sending Shipping Notice

There are two ways to send a Shipping Notice, the CSP or from the email PO notification.

1. Either click the **Add Shipment Tracking** button on the email notification or the **Add** button on the PO under Shipment Tracking.

2. Add Tracking Number, Carrier, and an optional note.

3. Click **Save**.

Request for PO Change

Request for PO Change

Supplier can also initiate PO changes via CSP.
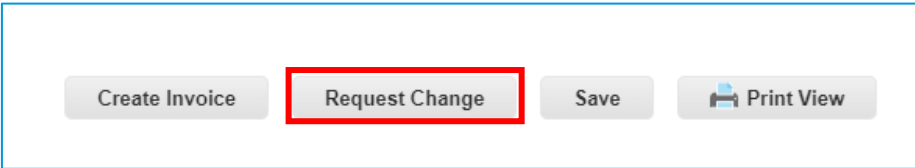
1. Go to **Orders** tab, find the PO that requires change then click the PO number.

2. At the bottom part of the page, click **Request Change** button.

Request for PO Change

3. Supplier can update the details of the PO i.e Qty or Price. It is required to provide Reason for Change and Comment (required for "Other").

4. Once all required fields are populated, click **Submit Change Request** button. This changes will be sent to the requester for approvals.

Creating an Invoice from a PO

Create an Invoice from PO (1/3)

There are two ways to create an invoice or credit note from a PO, from within a PO or from the main Orders tab.

1. From the Orders tab, click the (🟡) yellow coins Invoice icon or the (🔴) red coins Credit Note button.

2. You may also open a PO from the Orders tab, then click **Create Invoice** under the line items**.**

Create an Invoice from PO (2/3)

A draft Invoice will open with data prefilled from the PO.

3. Review the header details and add any missing information or required fields.

    a. Invoice Number: the invoice number must be unique

    b. Invoice Date: choose the invoice date

    c. Image Scan: upload a text-based PDF copy of the invoice

    d. Attachments: include any needed attachments.

3

Create Invoice Create

⚙ General Info

a * Invoice #

b * Invoice Date 11/02/23

Payment Term ZN45 | Payment Due Net 45 Days

* Currency USD

Delivery Number

Status Draft

c Image Scan Choose File No file chosen

Supplier Note

d Attachments Add File | URL | Text

This example is for a Qty PO. An Amt PO would include a **Price** field instead of **Qty**.

4. Review the line-level details and add any missing information or required fields.

   a. QTY or AMT: enter either the quantity to be paid or the amount of service to be paid.

   b. Shipping: enter any applicable shipping costs

5. Click **Calculate** to **total** the invoice.

6. Click **Save as Draft** or **Submit**.

7. Use the Comment section to communicate with CenterPoint Energy about specific invoices.

Creating an Invoice Backed by a Contract

Creating an Invoice Backed by a Contract

1. Go to **Invoice** tab, click on **Create Invoice from Contract**

2. Select the valid contract to create the invoice against, then click **Create** button.
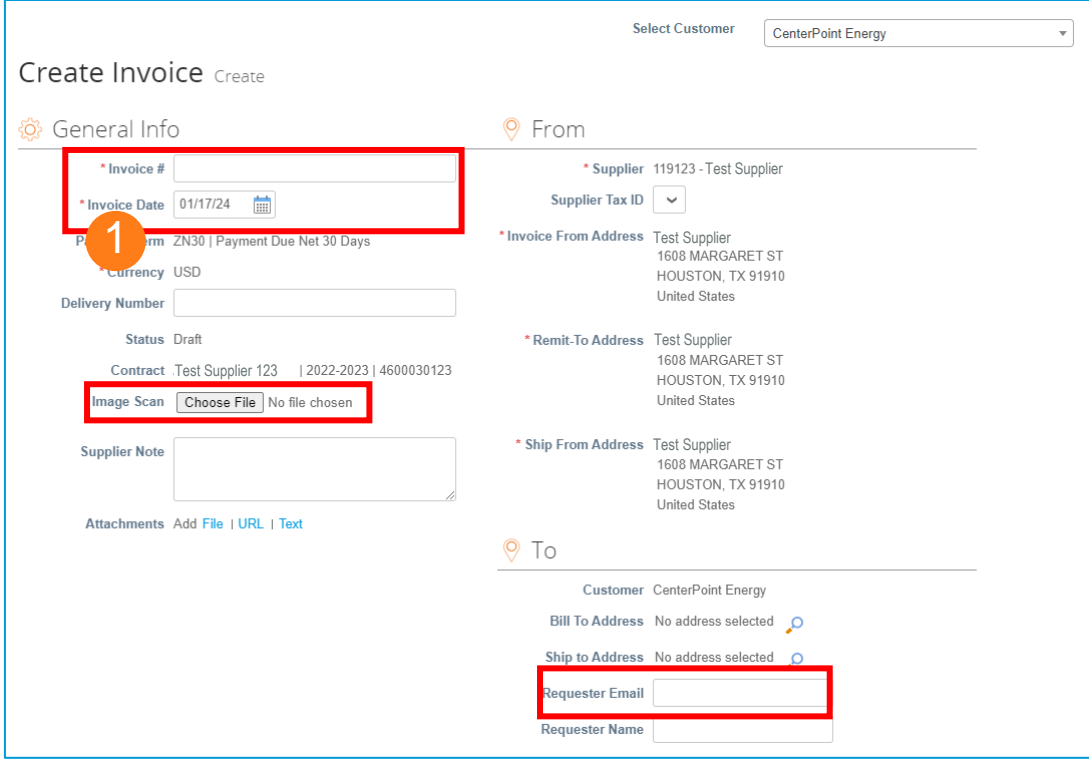
Creating an Invoice Backed by a Contract

3. Create Invoice page will be displayed, populate all required fields on the invoice header section.

Creating an Invoice Backed by a Contract

4. Populate the invoice Line level section and then click **Submit**. Popup window will be displayed to verify the total amount of invoice to be submitted, click **Send Invoice** to complete the process.

Checking Invoice Status

Checking Invoice Status

Use the Invoice tab to check the status of Invoices. Preconfigured views allow you to see different sets of invoices.

Checking Paid Invoices

1. To view all invoices, click Invoices.

2. Click Create View on the View dropdown.

3. Enter the name of the report.

4. Add condition: Paid=Yes.

5. Drag the information that you need in your report. Then, click Save.

6. Paid invoices are displayed.

Note: The same steps can be followed with various conditions and columns to create your own custom views

Support

Support Resources

1. [Click here](#) for more support information.

2. For additional support, email DigitalProcurement@centerpointenergy.com

Thank you