Coupa Supplier Portal User Guide

Astron Energy

A GLENCORE COMPANY

ASTRON ENERGY

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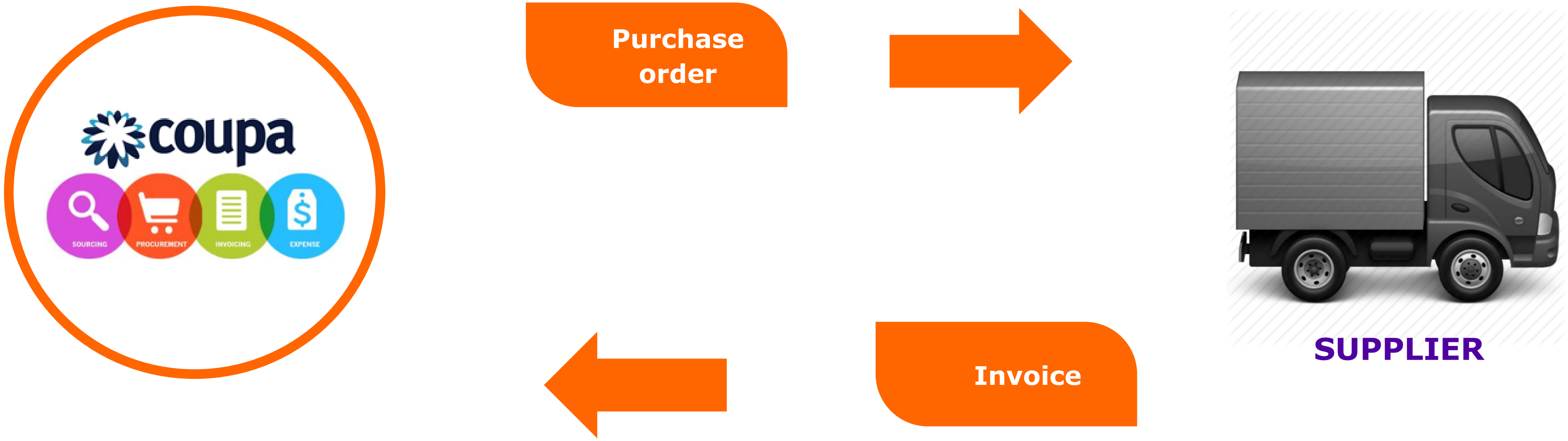
Agenda

Why Coupa?

1.2 Coupa for Suppliers

The Coupa Supplier Portal (CSP) is a **free** tool for suppliers to easily do business with customers who use Coupa. The CSP makes managing customers and transactions easy. Depending on the customer's specific Coupa configuration, content and settings can be managed on a customer-by-customer basis.



1.3 Coupa functionalities

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Coupa can be used for the following activities

- **Receive RFPs, RFQs, and submit responses to Astron Energy**
- **Submit legal agreements & contracts**
- **Receive and acknowledge Purchase Orders**
- **Create and submit invoices**
- **Check payment statuses**
- **Onboard and communicate master data changes to Astron Energy**

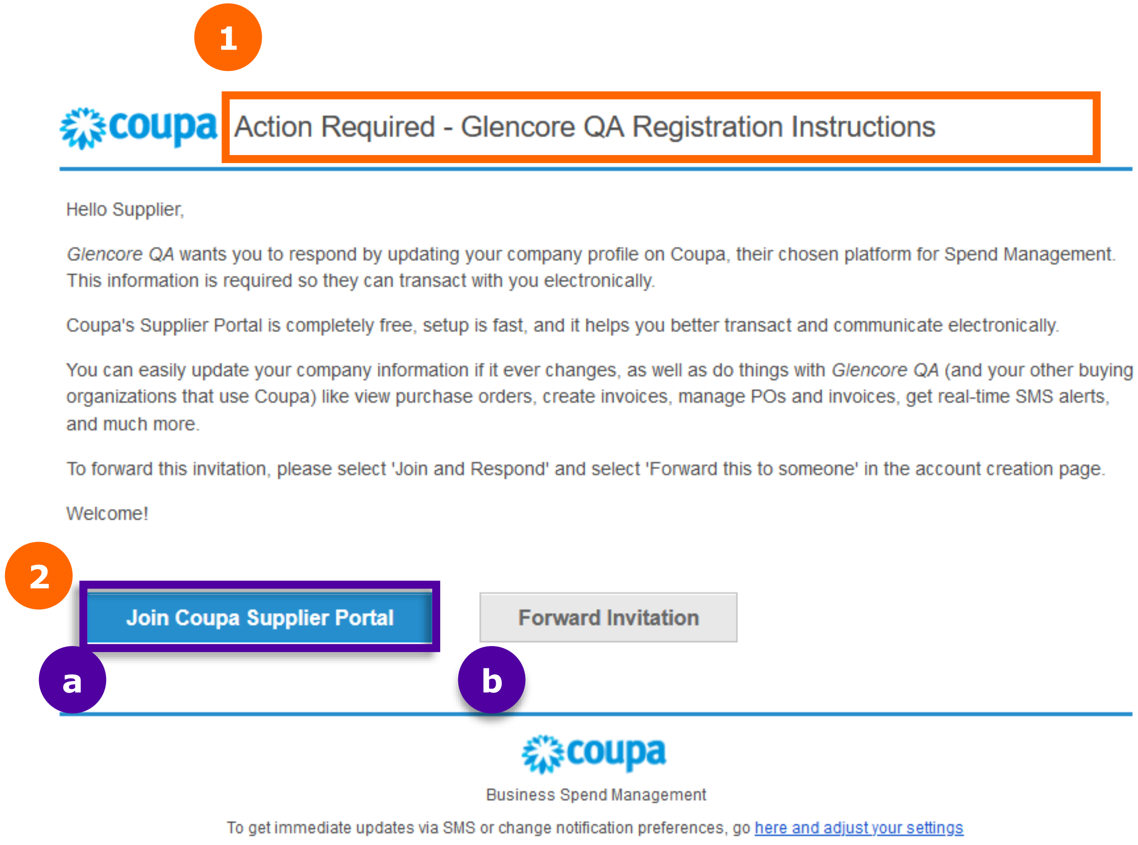
Supplier portal login

2.1 Supplier portal login

In this section you will learn how to register and log in to the supplier portal

1. An invitation to register with Coupa will arrive in your inbox.
2. At the bottom of the email, you will find two options:
   - a. Select the Join Coupa option to continue with the registration process.
   - b. Select the forward this option to forward the invitation to another user of the company.

NOTE: The invitation is sent to the supplier main email that Astron Energy has, the registration must be done by the person who will administer the portal. Later you will be able to add more users



An invite with a Coupa registration link will be sent out to all existing/current suppliers who have a vendor number

2.2 Access to the supplier portal

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Getting started on Coupa

When you select the Join Coupa Supplier Portal, you will be taken to the CSP page to create an account by choosing a password, confirming the password and accepting the **Privacy Policy & Terms of Use.**

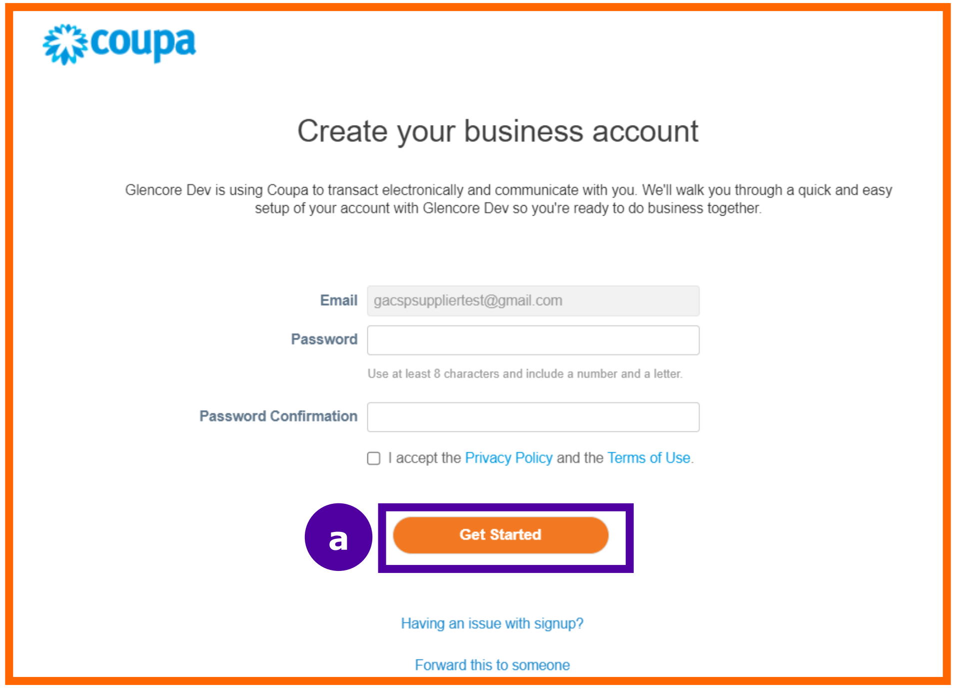
3 You must fill in the requested information by creating your password

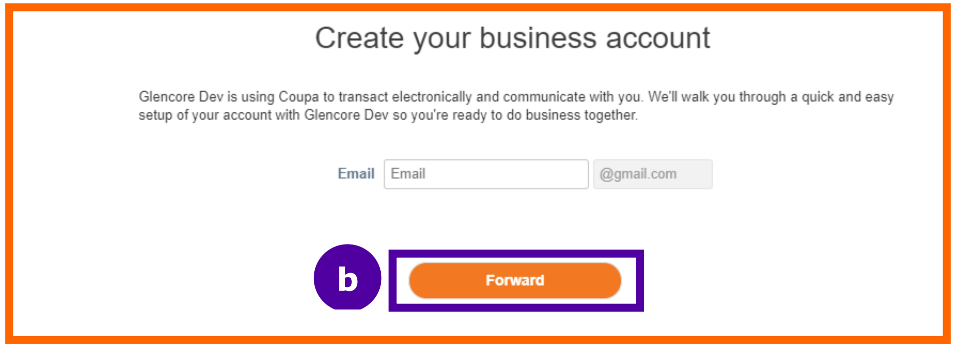
a Confirm the terms of the platform and select **Get started** to register.

b The option to forward the invitation to another user of the company is available.

NOTE: The email field is already filled in, this field cannot be changed. If you wish to change the email address, please contact Astron Energy to make the change.

3



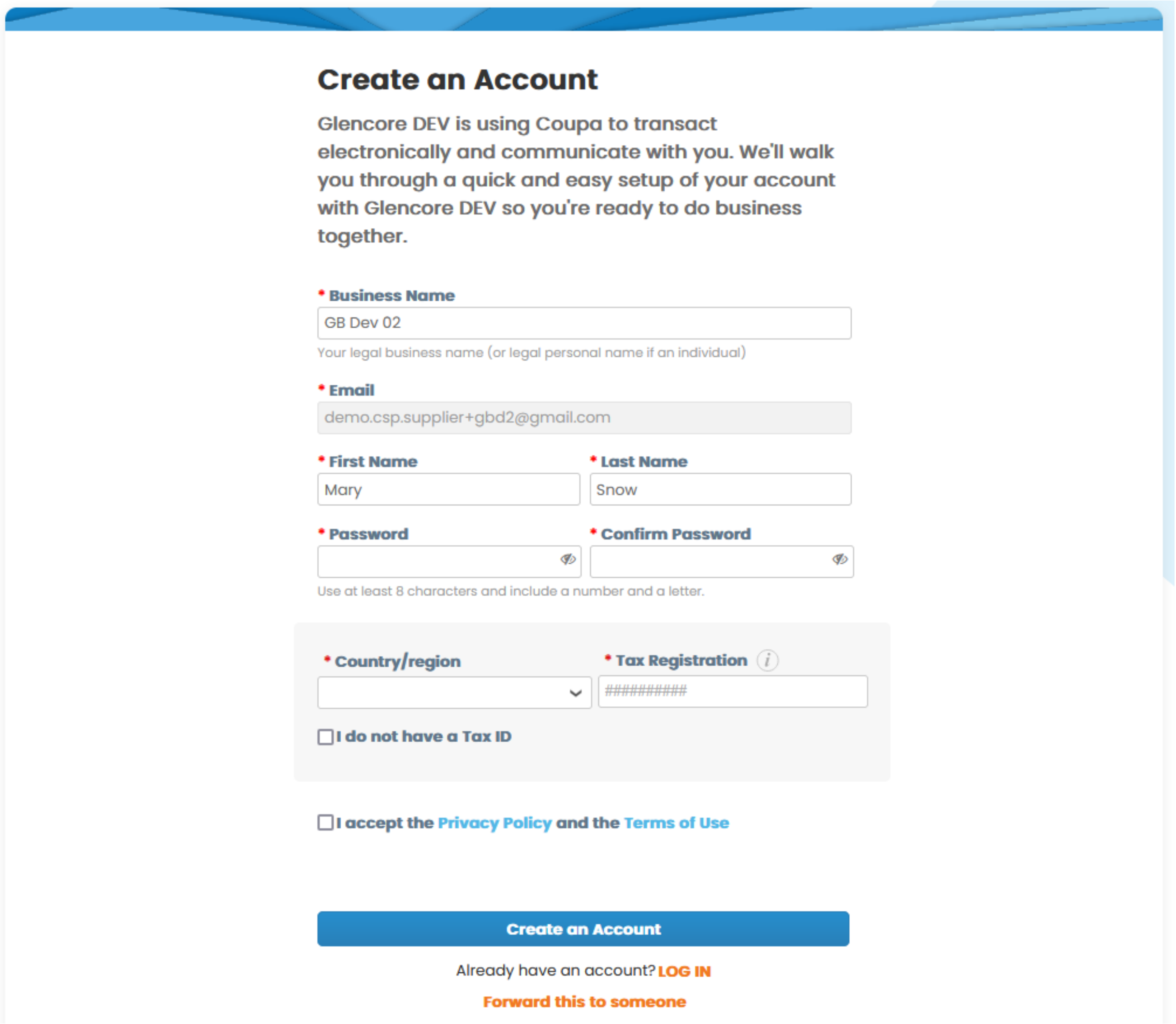


2.3 Supplier registration

Coupa supplier portal

Suppliers logging into CSP for the first time will be prompted to create a basic profile by entering the following details:

- **Company Name**
- **Country/Region**
- **Tax Registration**
- **Address Line 1**
- **City**
- **Postal Code (Mandatory)**
- **Website**
- **Address Line 2**
- **State (Optional)**



2.3 Supplier registration

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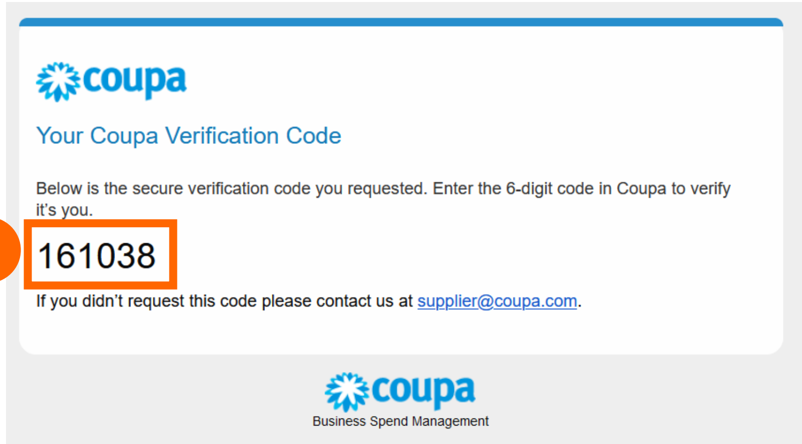
Coupa supplier portal

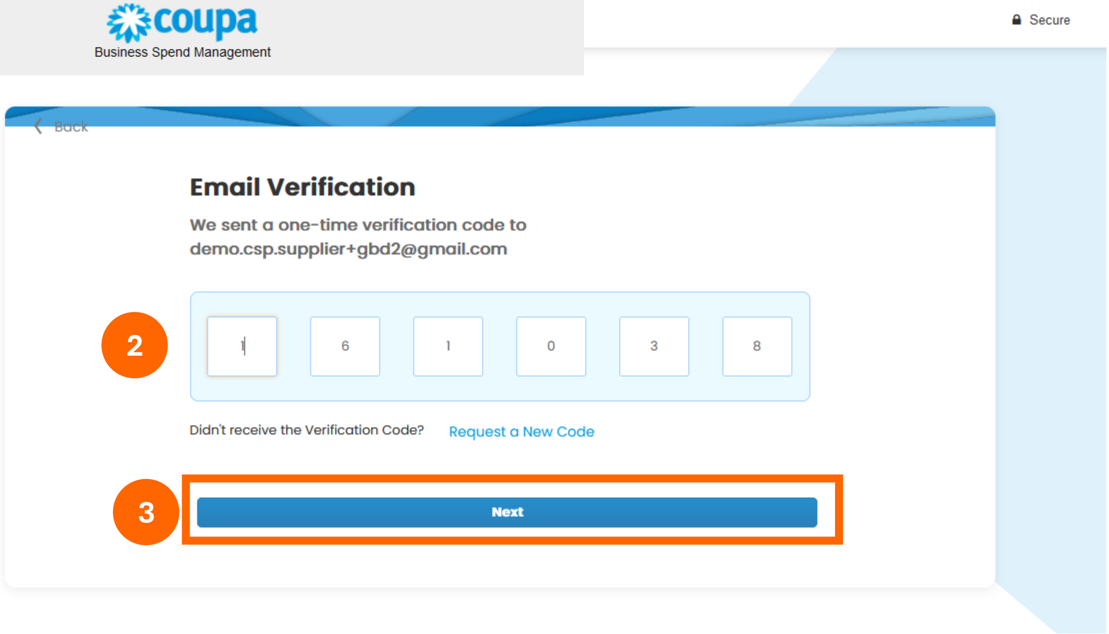
You will be asked to verify your email address by entering the verification code sent to your email address.

1. Check your email for your unique Coupa Verification Code.



2. Copy the number in the email and paste into the fields on the Email Verification screen.

3. Click **Next** to continue setting up your profile.



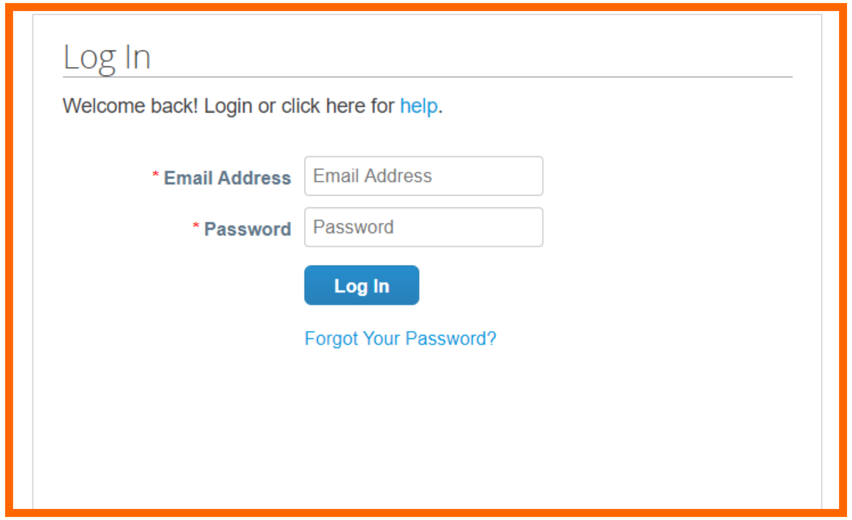
2.4 Supplier portal login

In this section you will learn how to log in to the portal once you have registered

1. Once you have registered in the platform, log in at the following page: **https://supplier.coupahost.com/**

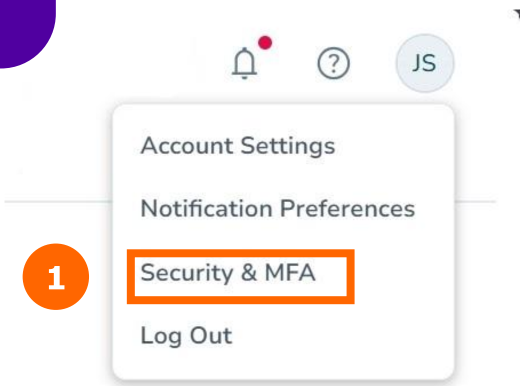
2. Supply your email and password and click on login.

2



2.5 Supplier portal security

The Coupa Supplier Portal requires the use of multi-factor authentication as an additional security measure on your account to protect sensitive business information



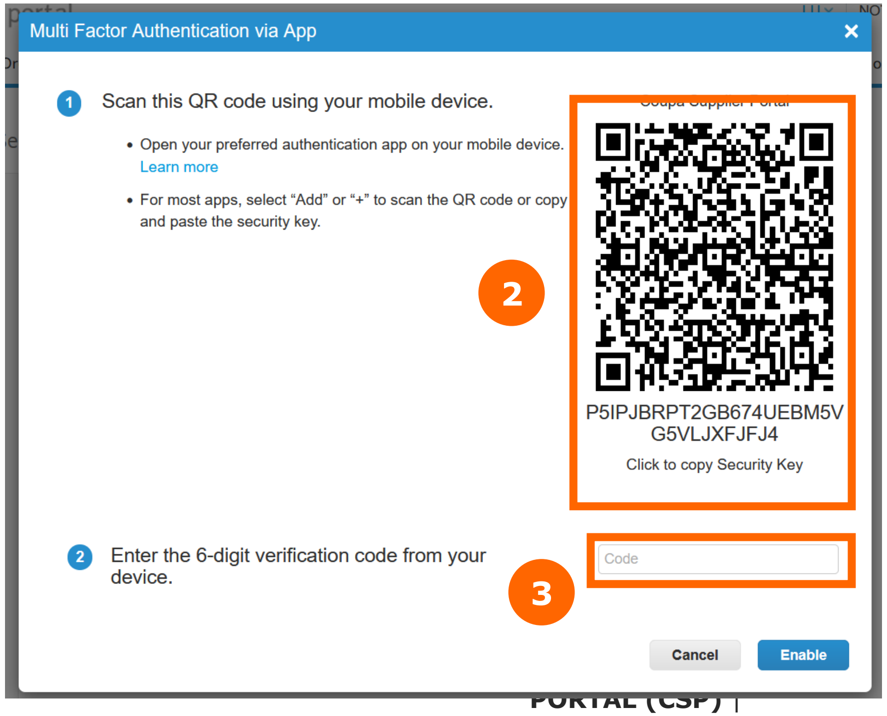
1 Adjust the security and multi-factor authentication (MFA) settings by selecting **Security & MFA** in the user account settings area.

First time use will require you to open your preferred authenticator app on your mobile device and select **Add Account** (or the **+** icon).

2 Then either:

- **Scan the QR code** displayed on the screen using your authenticator app (recommended), or
- **Enter the security key manually** if you are unable to scan the QR code.

3 Once your authenticator app has been linked to your Coupa Supplier Portal account, complete the setup by entering the 6-digit code provided by your **authenticator app.**



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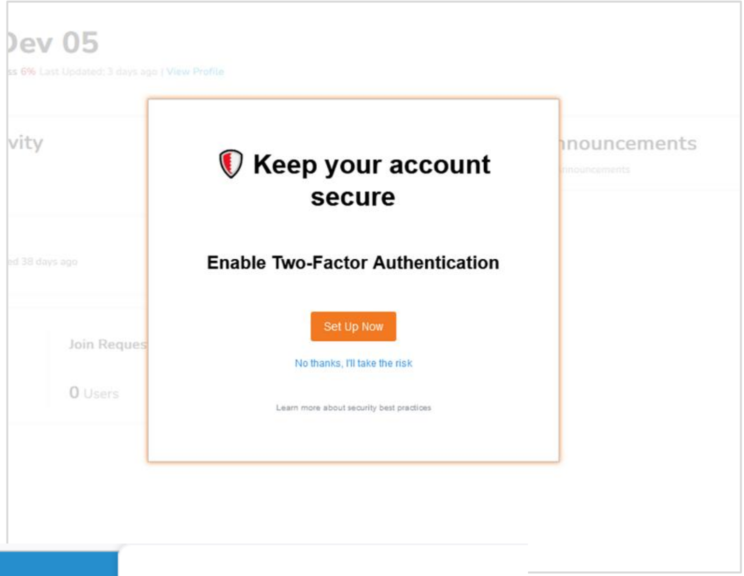
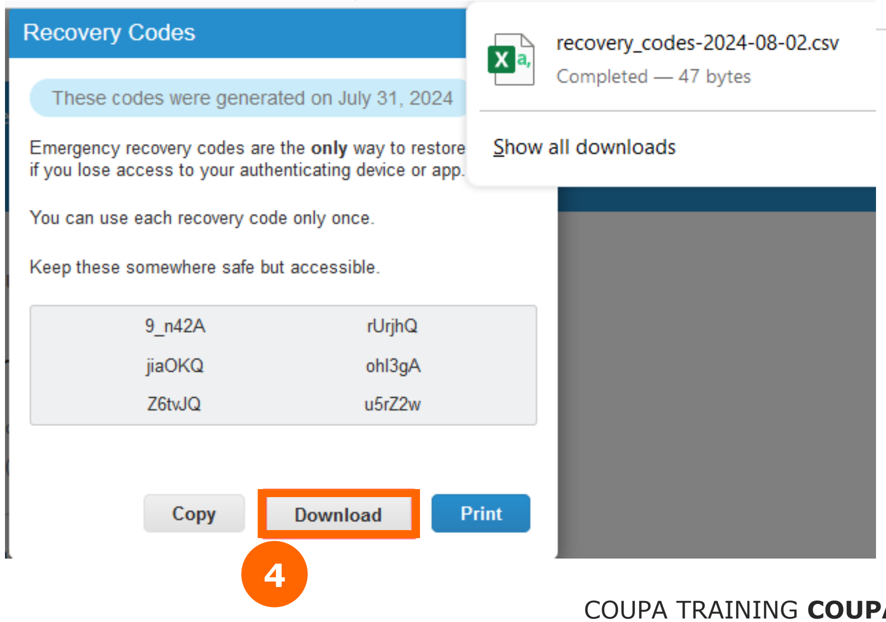


4 When you complete the MFA setup process for your user profile, **it's important to save your recovery codes.**

NOTE: Be sure to Download a copy of your recovery codes. If you don't have your recovery codes, you may not be able to access or make changes to your account.



Navigation and use of the portal

3.1 Navigation and use of supplier portal

In this section you will learn how to use the supplier portal and the functionalities available in the portal

NOTE: *The layout of the Coupa Supplier Portal is subject to change as Coupa may apply updates and new features to improve user experience. Therefore, some screenshots in this deck may vary slightly to what you see on the Coupa supplier portal.*

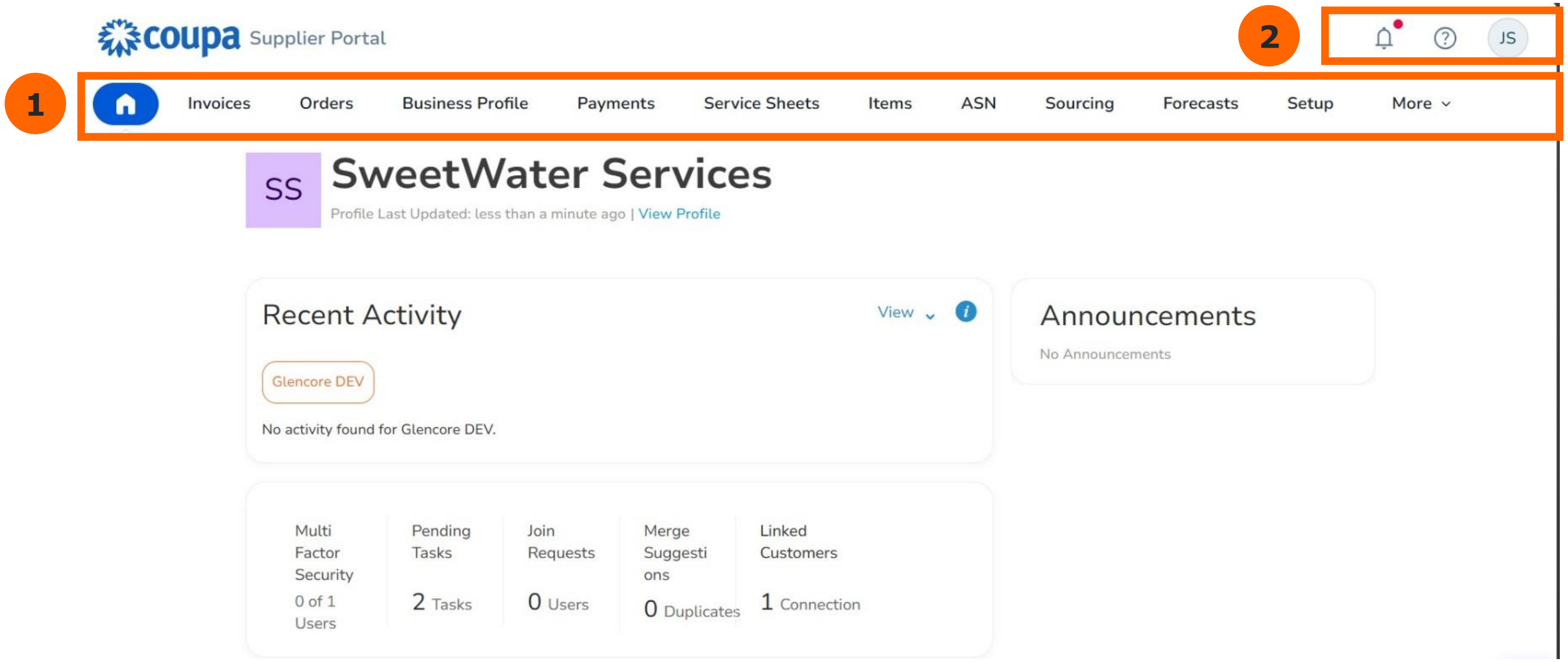
3.1 Navigation and use of supplier portal

In this section you will learn how to use the supplier portal and the functionalities available in the portal

1 At the top you will find the menu or the options available within the portal.

2 On the upper right-hand side is where you can manage the platform, change passwords, manage notifications and a help section.

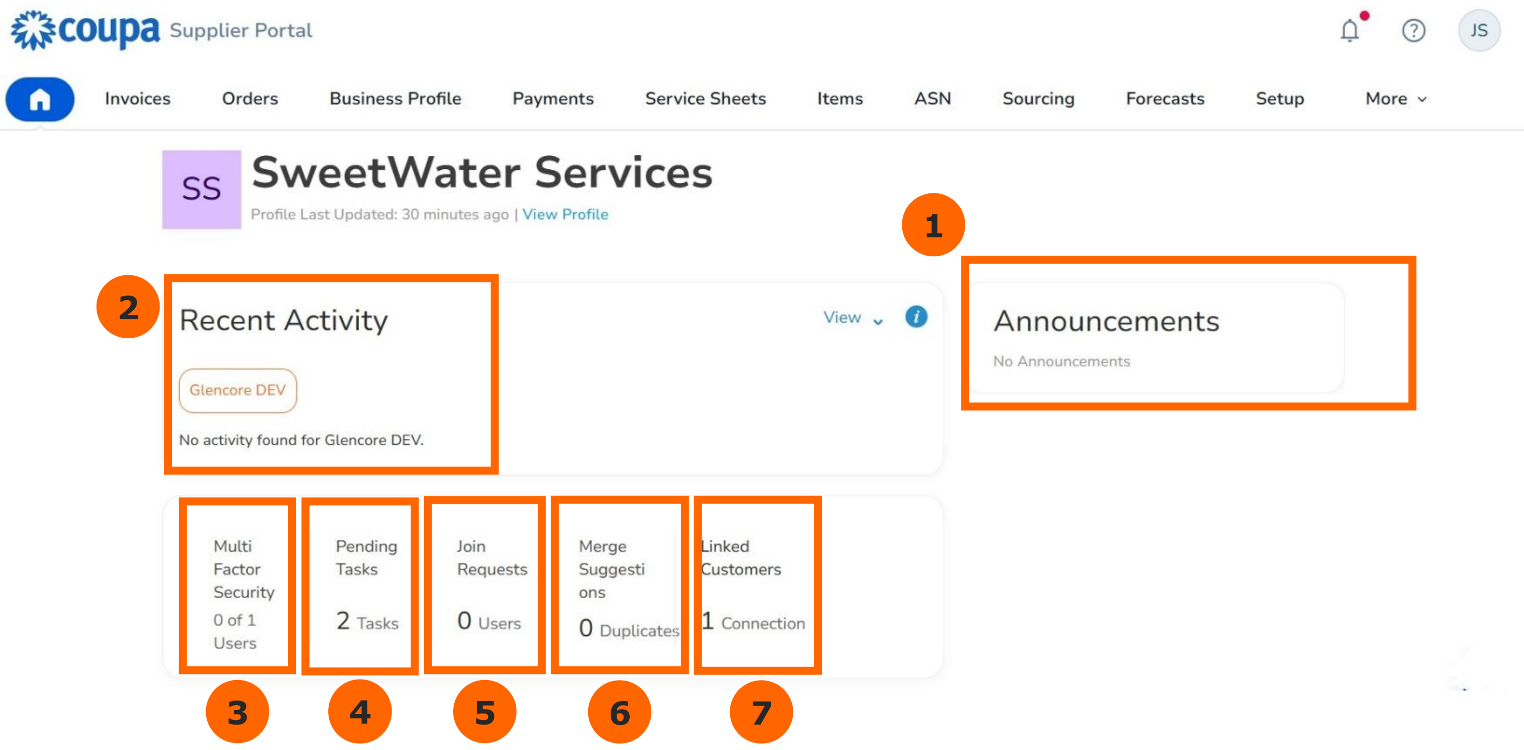
NOTE: If you interact with more than one client in Coupa, you will find them in the recent activity section. To work with Astron Energy, select the one that refers to Astron Energy.



3.2 Home tab

In this section you will learn how to view the functionalities of the home tab

1. Announcements section where Astron Energy will be informing about new developments.
2. Recent activity will be listed here
3. Multi-factor security information will be displayed here
4. Number of Pending tasks appear here
5. Join requests will be displayed here
6. Merge suggestions will be displayed here
7. If you have multiple customers, click here to view them.



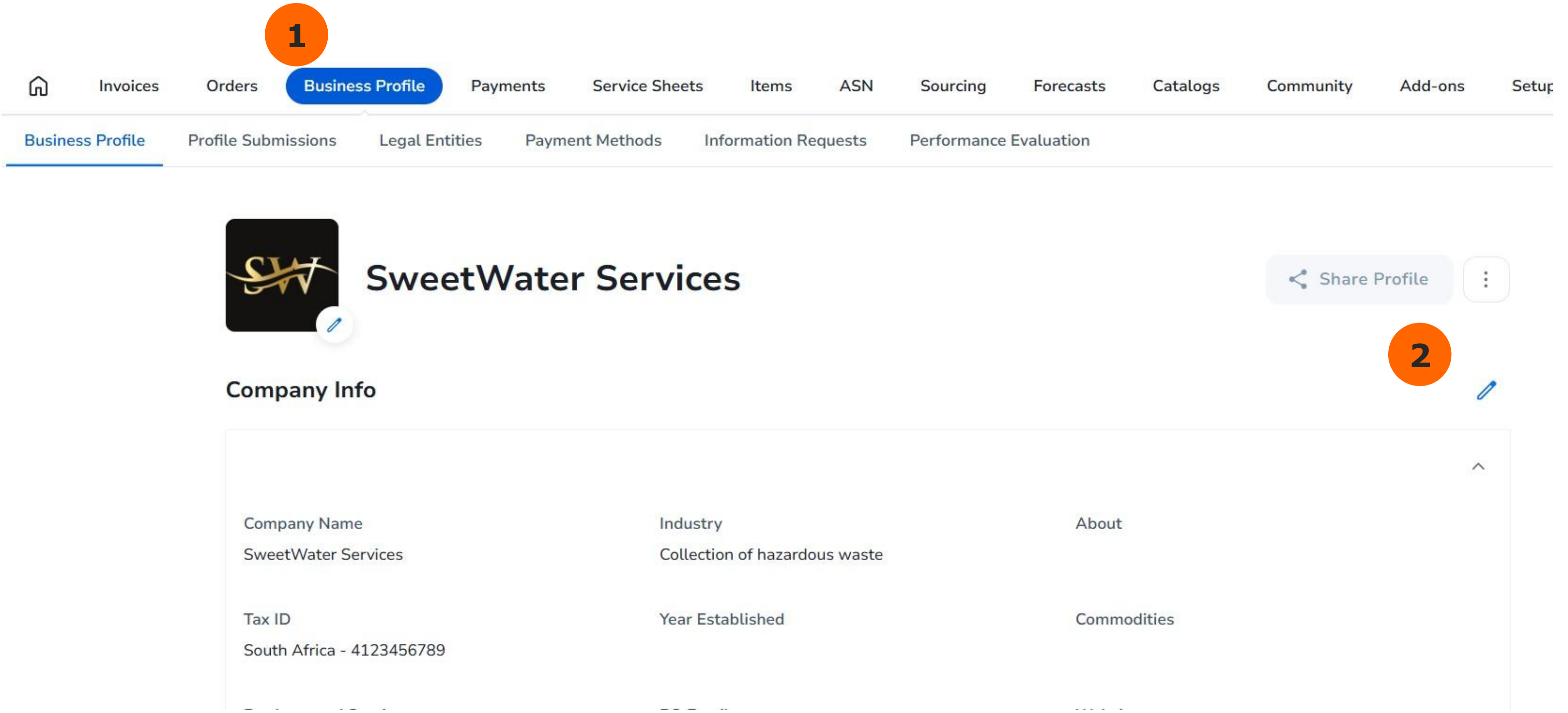
NOTE: The help option is directly with Coupa, at your disposal you will find help material for support.

3.3 Business Profile tab

This section corresponds to the company profile where you can update your business' information

1. Click to see the Business Profile

2. Edit the business profile clicking the pencil icon and adding information to the relevant field



NOTE: This is your organisation's public company profile. Additional business information can be added and maintained to ensure your profile remains complete and up to date.

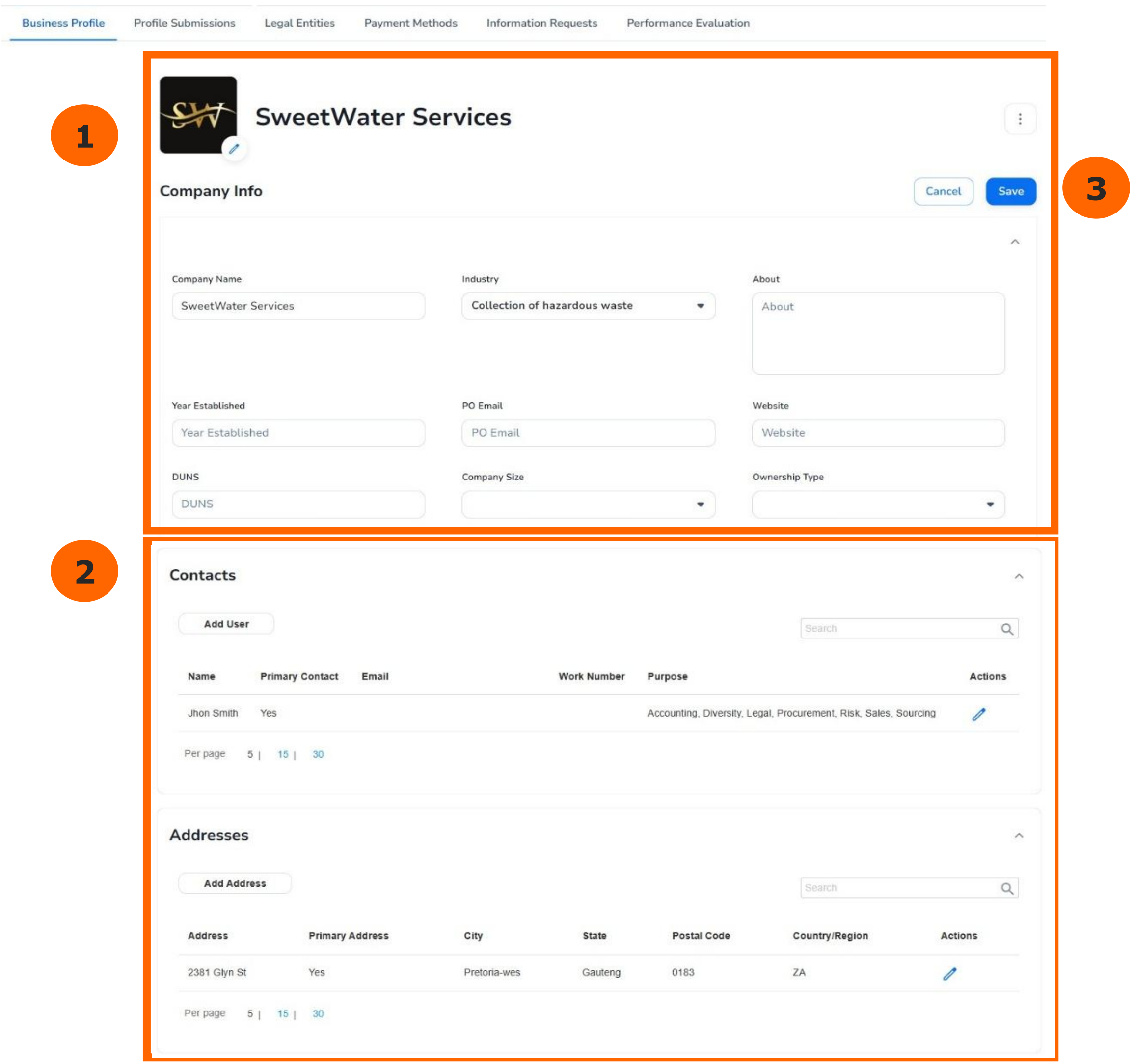
3.4 Business Profile Update

In this section you will find all the information you need to update your profile

1. Review and update the applicable fields to maintain an accurate and up-to-date public business profile.

2. Use this section to maintain your company information, including business addresses and contact details.

3. Use this section to maintain your company information, including business addresses and contact details.



3.5 Orders tab

This section corresponds to all the purchase orders you have received from Astron Energy

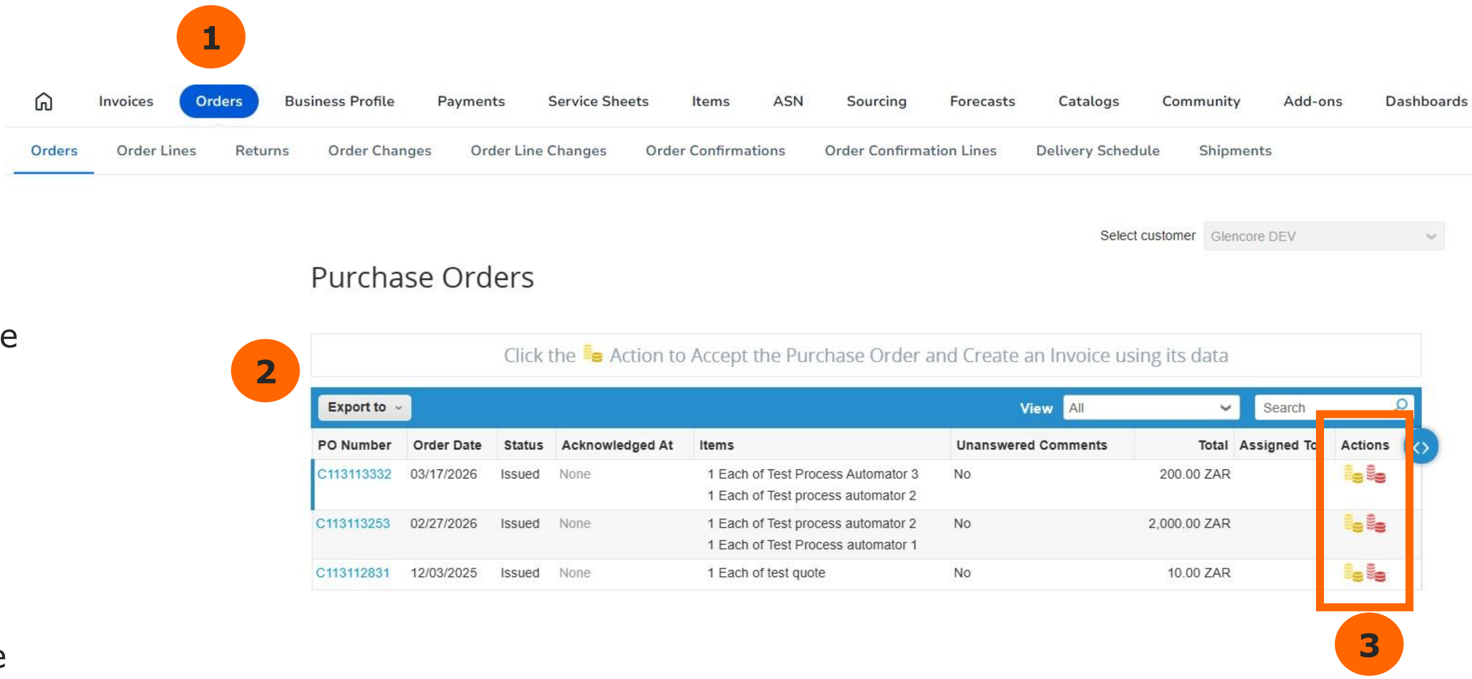
1. Use the Orders tab to view purchase orders, their current status, and a brief description

2. Click the PO number in blue to view details of the Purchase Order

3. Use the Actions section to create invoices and credit notes

   This icon creates an invoice from the Purchase order

   Clicking this icon creates a credit note* **(See NOTE)**

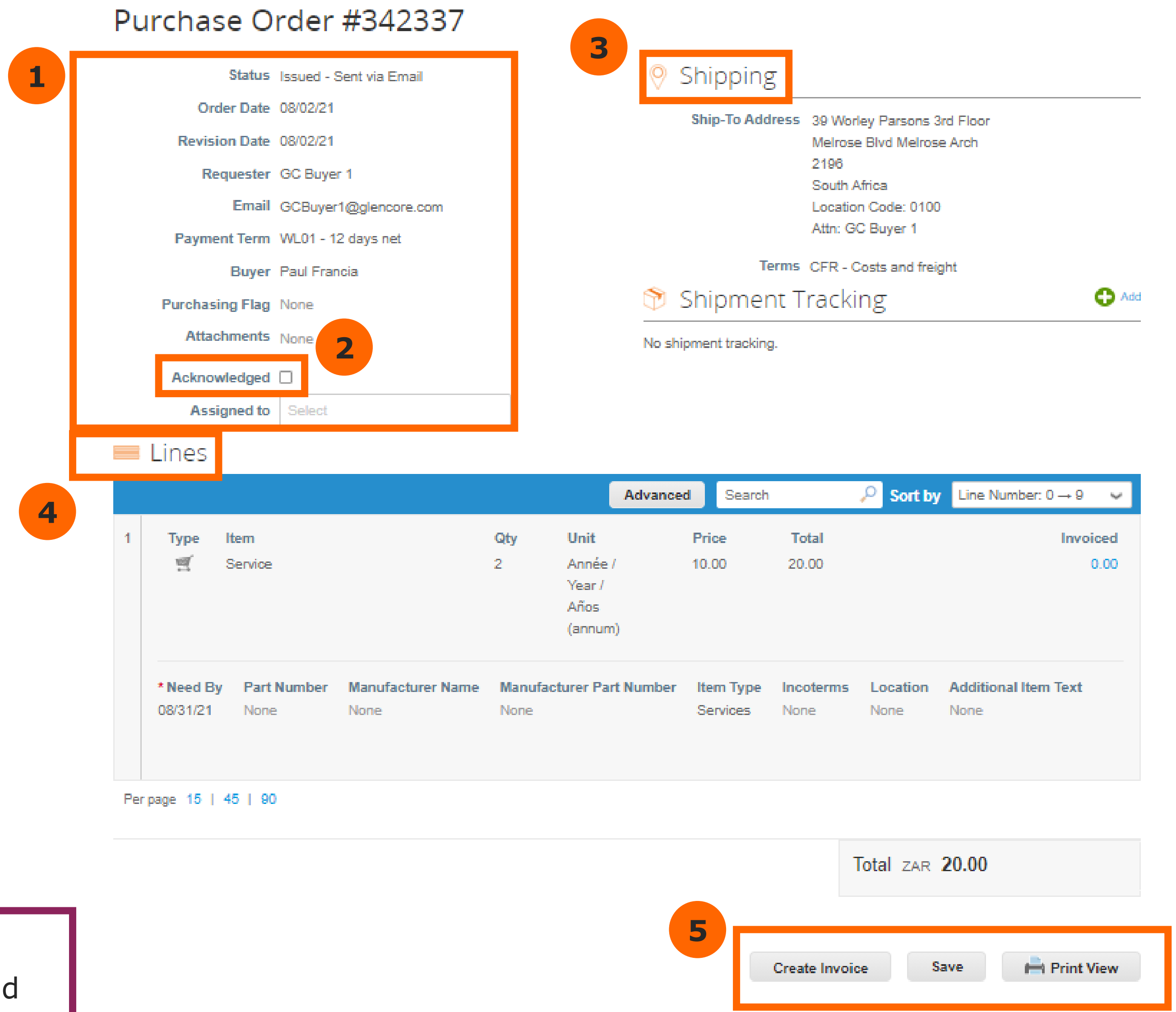


NOTE: Creating a credit note directly against a purchase order **is not allowed** as part of the Astron Energy design/process

3.6 Orders tab

In this section you can review the information contained in a purchase order

1. After selecting the purchase order, the purchase order details will be displayed.
2. Check the **Acknowledged** box to indicate the purchase order has been reviewed. Astron Energy requires that orders be acknowledged **within 3 business days.**
3. Review the **Shipping** section to view the address associated with the purchase order
4. Lines or items that are part of the purchase order will be visible under the **Lines** section
5. Use these buttons for the various options available to you for processing the order



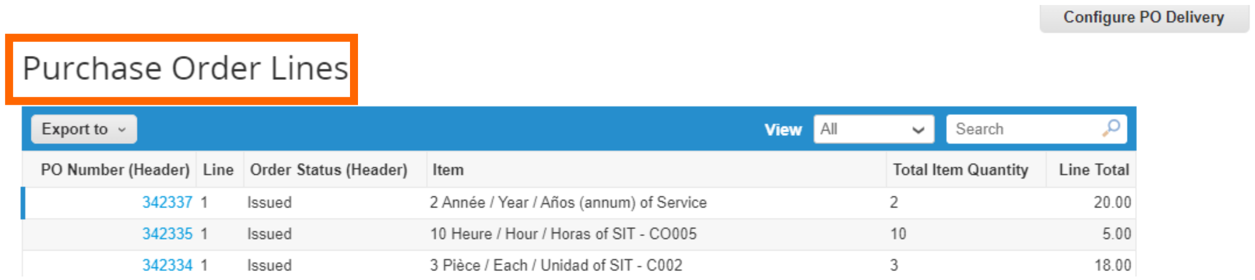
NOTE: Astron Energy **requires** all purchase orders to be acknowledged within 3 business days of receipt.

3.7 Orders tab

This section corresponds to all the purchase orders you have received from Astron Energy

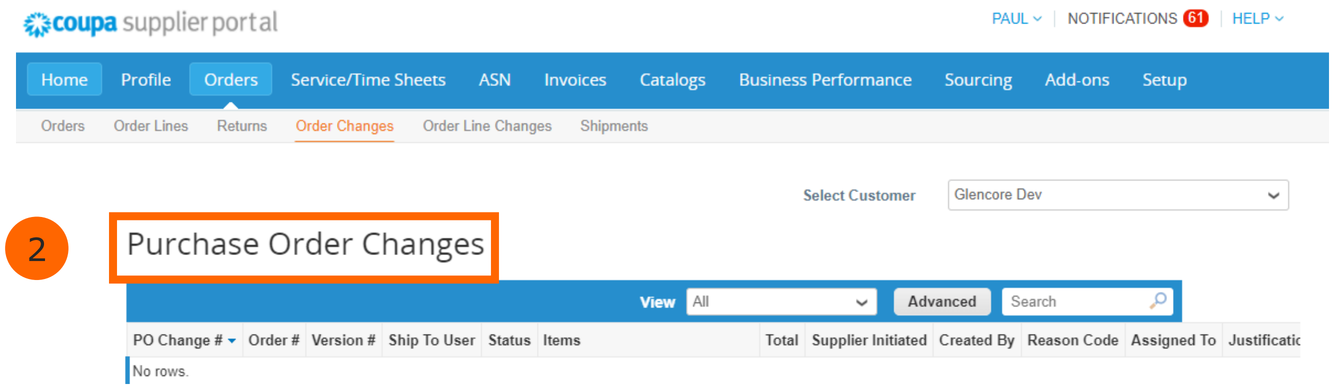
1. The Purchase Order Lines section displays the history of order lines associated with your purchase orders and allows you to export the data to Excel.

1



2. Use this section to review and track changes made to your purchase orders over time.

2



NOTE: Suppliers can submit requests to modify purchase orders. All requested changes are subject to review and approval by Astron Energy.

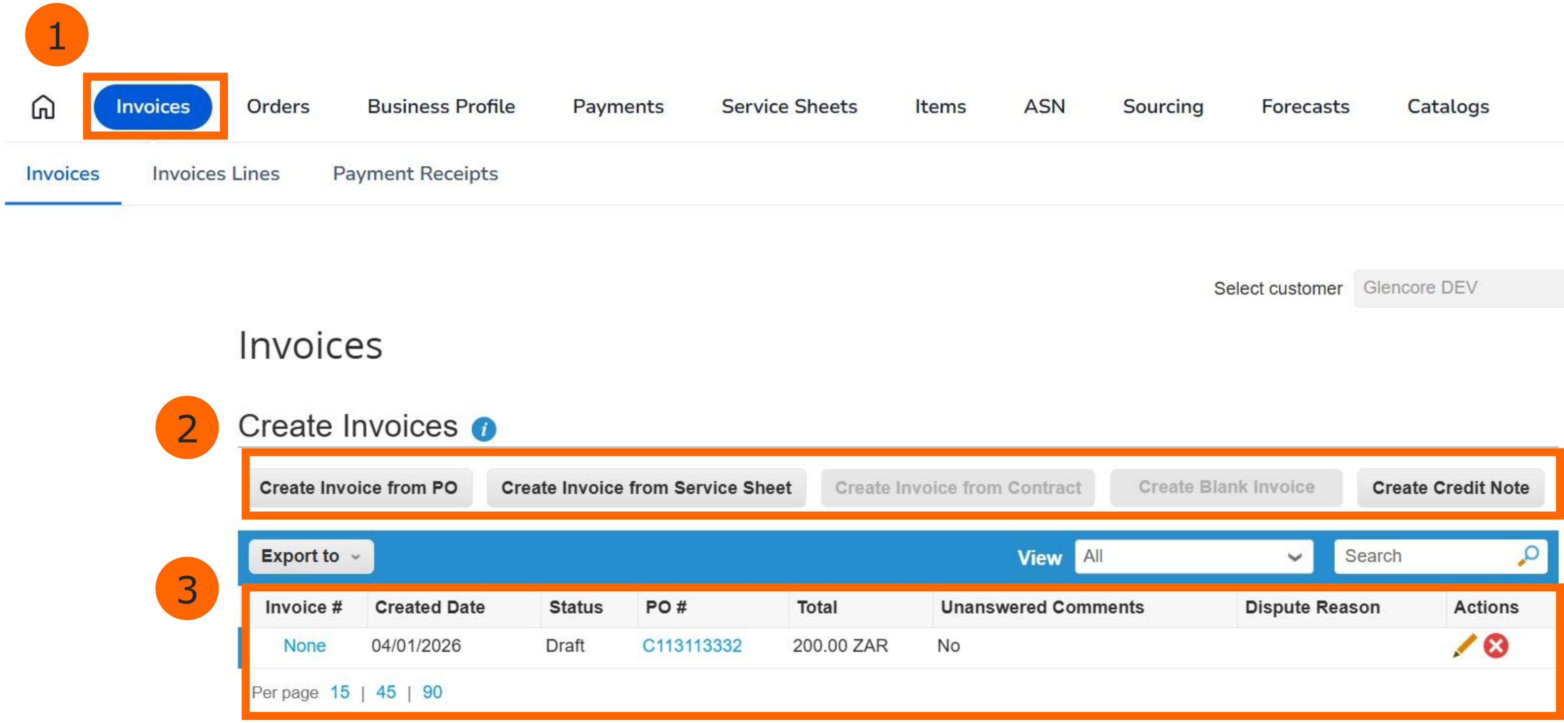
3.8 Invoice tab

In this section you can review all your invoice information

1 Entering the invoices tab you will be able to see everything related to all invoices in Coupa

2 Use these buttons to create and submit invoices and credit notes against purchase orders

3 Use this section to view invoices you have created, including their status and key invoice details



NOTE: 'Create Blank Invoice' and 'Create Invoice from Contract' options will only be allowed for selected suppliers.

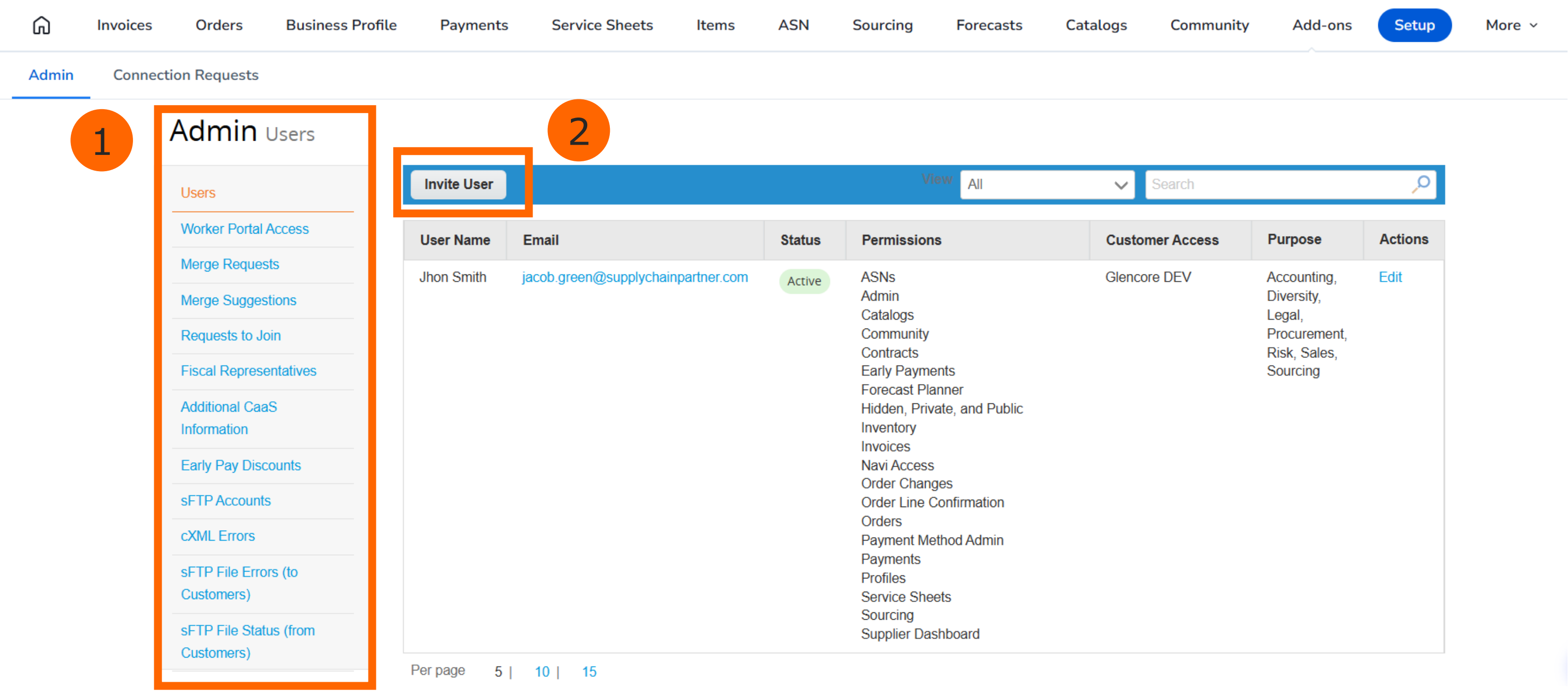
3.9 Setup tab

The setup tab is where you can configure some features of your account.

1 Here you can find the admin functions available to you

2 Click this button to invite a colleague from your organisation to use the Coupa Supplier Portal

NOTE: All these functionalities will be detailed in section 8.



Creating a Legal Entity and assigning payment methods

4.1 Adding a legal entity

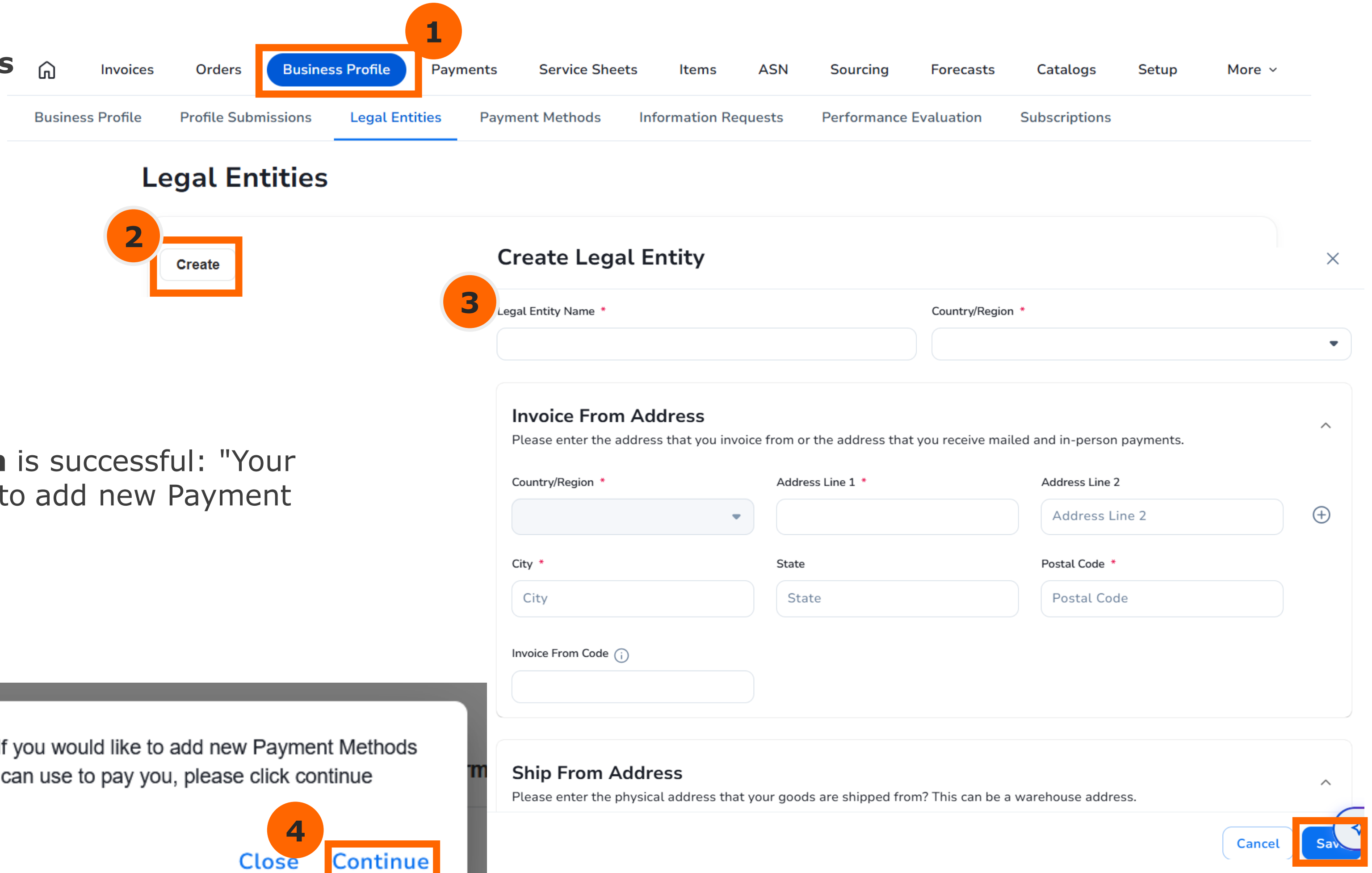
Create a Legal Entity to represent your company and give your Coupa customers the information they need to do business with you.

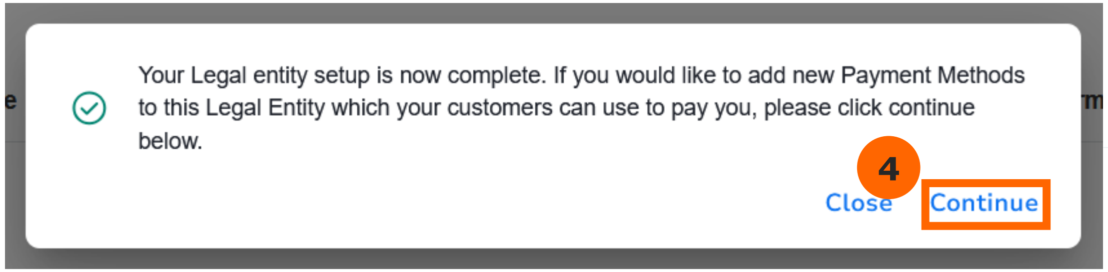
1. Navigate to the **Business Profile** > **Legal Entities**

2. Click the **Create** button under the **Legal Entities** header.

3. Complete the details in the Create Legal Entity form and click **Save**

4. A confirmation message **confirms that the action** is successful: "Your Legal Entity setup is now complete. Click continue to add new Payment Methods to this Legal Entity.

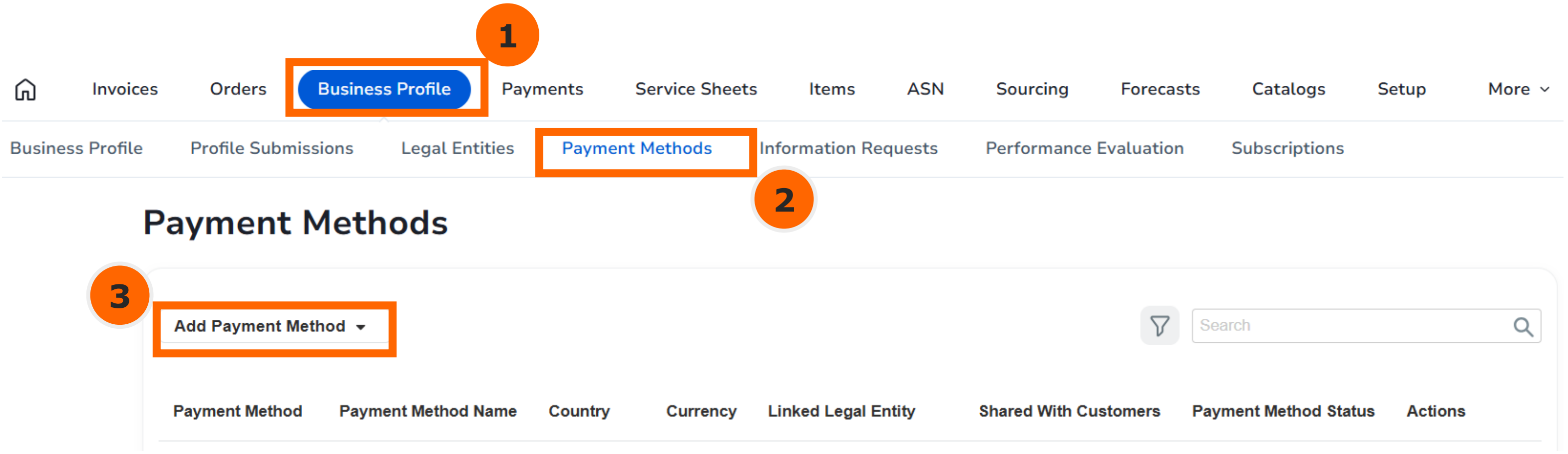




4.2 Adding a payment method (or Remit-To) Information

Payment methods are the individual options you register for customers to pay you once an invoice has been approved

1. Navigate to the **Business Profile** tab
2. Click the **Payment Methods** subtab
3. Click **Add Payment Method** to select the payment method to apply to a legal entity
4. Select the legal entity you want to link to the chosen payment method



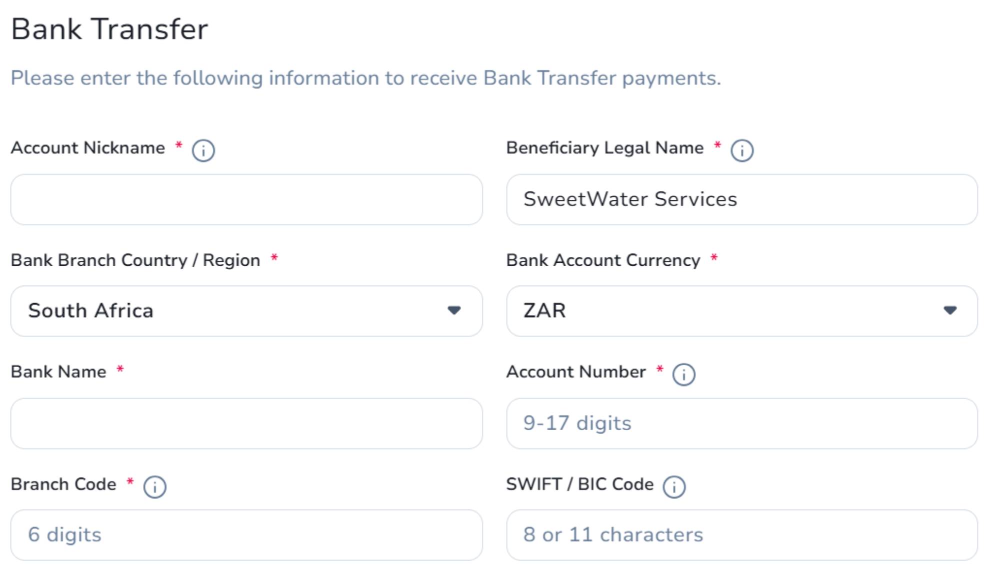
4.2 Adding a payment method (or Remit-To) Information

Payment methods are the individual options you register for customers to pay you once an invoice has been approved

5 Complete the **Bank Transfer Information** section by entering the banking details for the account to which you would like payments to be made.

6 Once the payment information has been saved successfully, you can select the individual customers to whom this payment method will apply.

5



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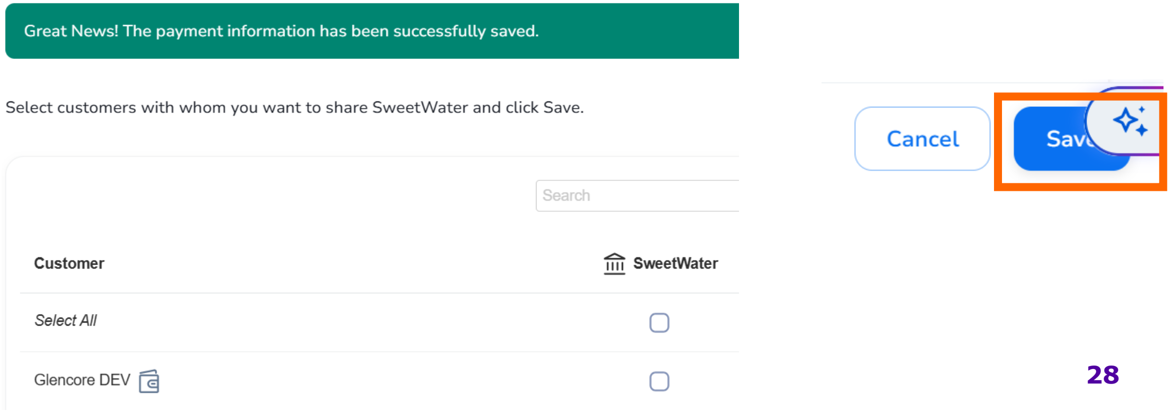

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Create an invoice from a Purchase Order

Electronic invoicing – important information

Please remember:

Astron Energy's required method of receiving invoices is digital submission as explained in this document. All suppliers should adopt this method as soon as possible.

Once an invoice is submitted digitally, there is NO REQUIREMENT to send a copy by email to any address you may have. Please do not send invoices by email and deactivate any automated emails that may send invoices to Astron Energy.

For ease of reviewing and revising invoices (if required) it is recommended that suppliers register on the Coupa Supplier Portal and manage their interactions with Astron Energy there.

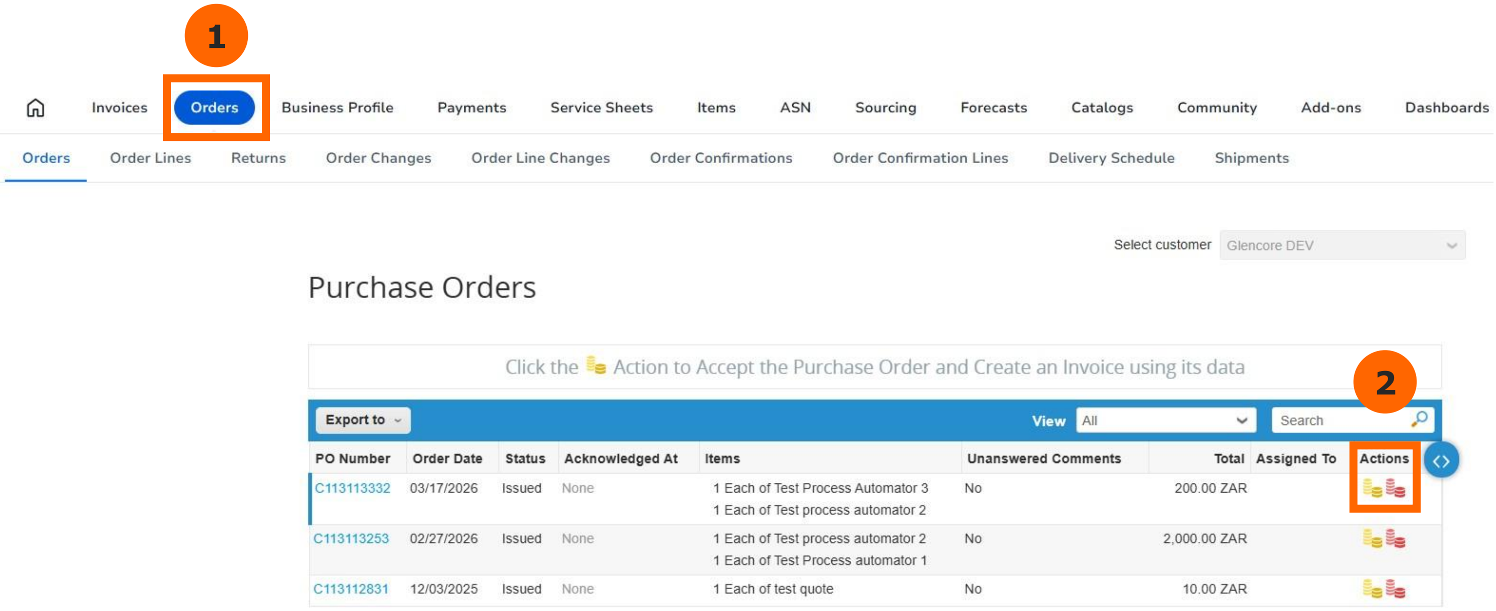
5.1 Creating an invoice from a Purchase Order

In this section the creation of the invoice is demonstrated

1. In the purchase orders tab identify the order to create the invoice

2. Click on the icon to create an invoice for the corresponding order

NOTE: In the orders tab you will find all the purchase history you have with Astron Energy. You cannot consolidate purchase orders to generate invoices. You must perform the process for all orders separately



5.2 Creating an invoice from a Purchase Order

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In this section the creation of the invoice from a purchase order is demonstrated

1 **Complete** the General info section providing the following details:

- Your company **invoice** (PDF or image file) in the **Image Scan field***

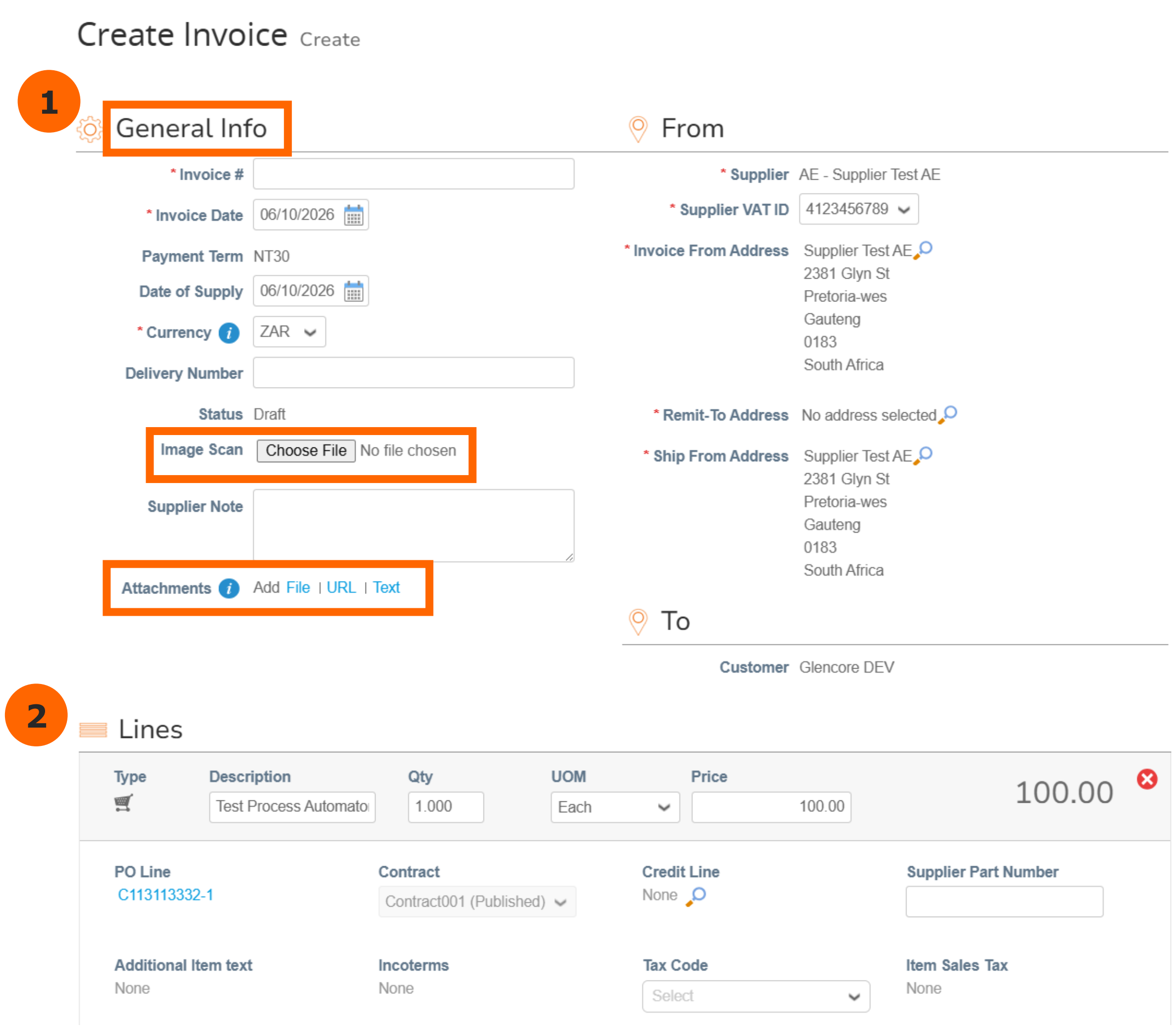
  ***Do not upload an invoice if you are invoicing from a South Africa Legal Entity as a legal invoice will be provided for you by Coupa.**

- Provide all necessary invoice supporting documentation in the **Attachments** section providing a file, URL or text.

  - **Supporting documentation** examples are:
    - Delivery Note
    - Goods Received Note (GRN)
    - Signed Service Completion Confirmations
    - Progress Reports

2 Review the invoice lines in this section and complete any required information as needed and enter the required **VAT rate or Tax Code** as appropriate.

NOTE: It is required to create and setup a legal entity before submitting the first invoice



5.2 Creating an invoice from a Purchase Order

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In this section the creation of the invoice is demonstrated

3 Provide either the corresponding VAT rate or Tax code to the line items as appropriate.

4 Options available for invoice management

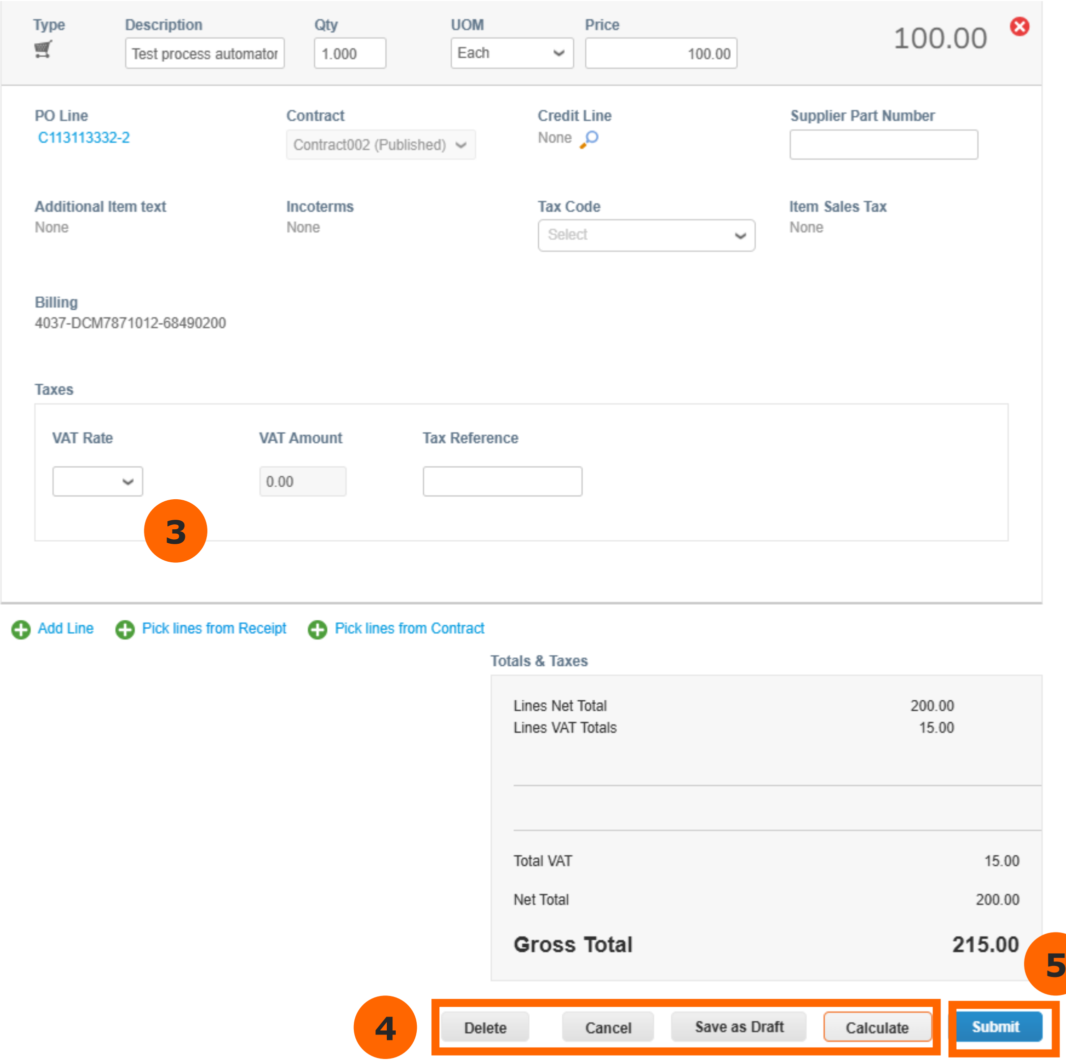
Delete: Deletes the current invoice from the system only if the invoice has yet to be submitted

Cancel: Cancels the invoice after it has already been submitted to Astron Energy.

Save as draft: Save the invoice and continue editing it later.

Calculate: The invoice total is updated, including tax added

5 Click **Submit**.



5.2 Creating an invoice from a Purchase Order

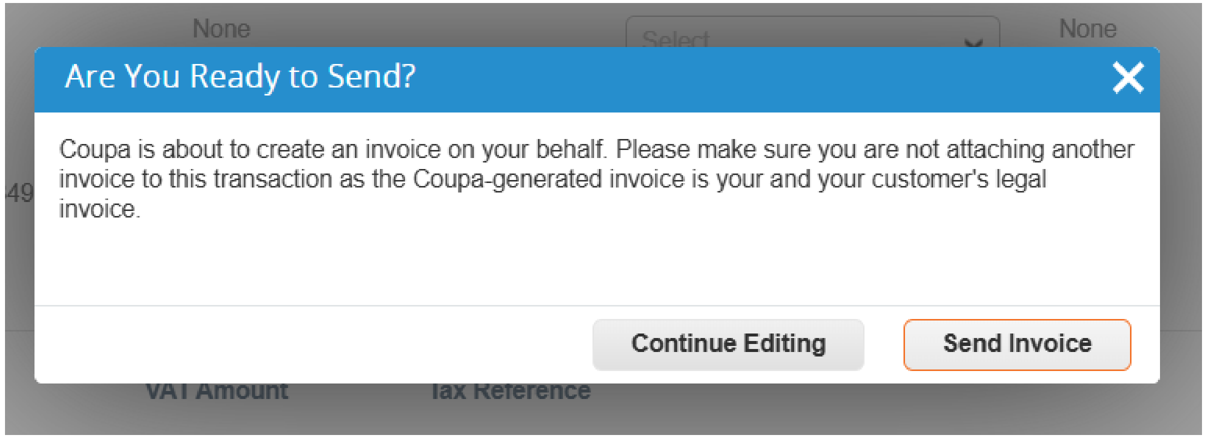
In this section the creation of the invoice is demonstrated

6 A confirmation message will appear. Click **Send Invoice** to submit the invoice or **Continue Editing** to return and make changes.

7 If required*, ensure the **image scan** of your invoice is attached before submitting the invoice. If it is missing, a notification message will be displayed.

*Please note: if you are invoicing from South Africa, uploading an invoice is not needed.

8 Click **Continue Editing** to return to the invoice and provide any missing information.



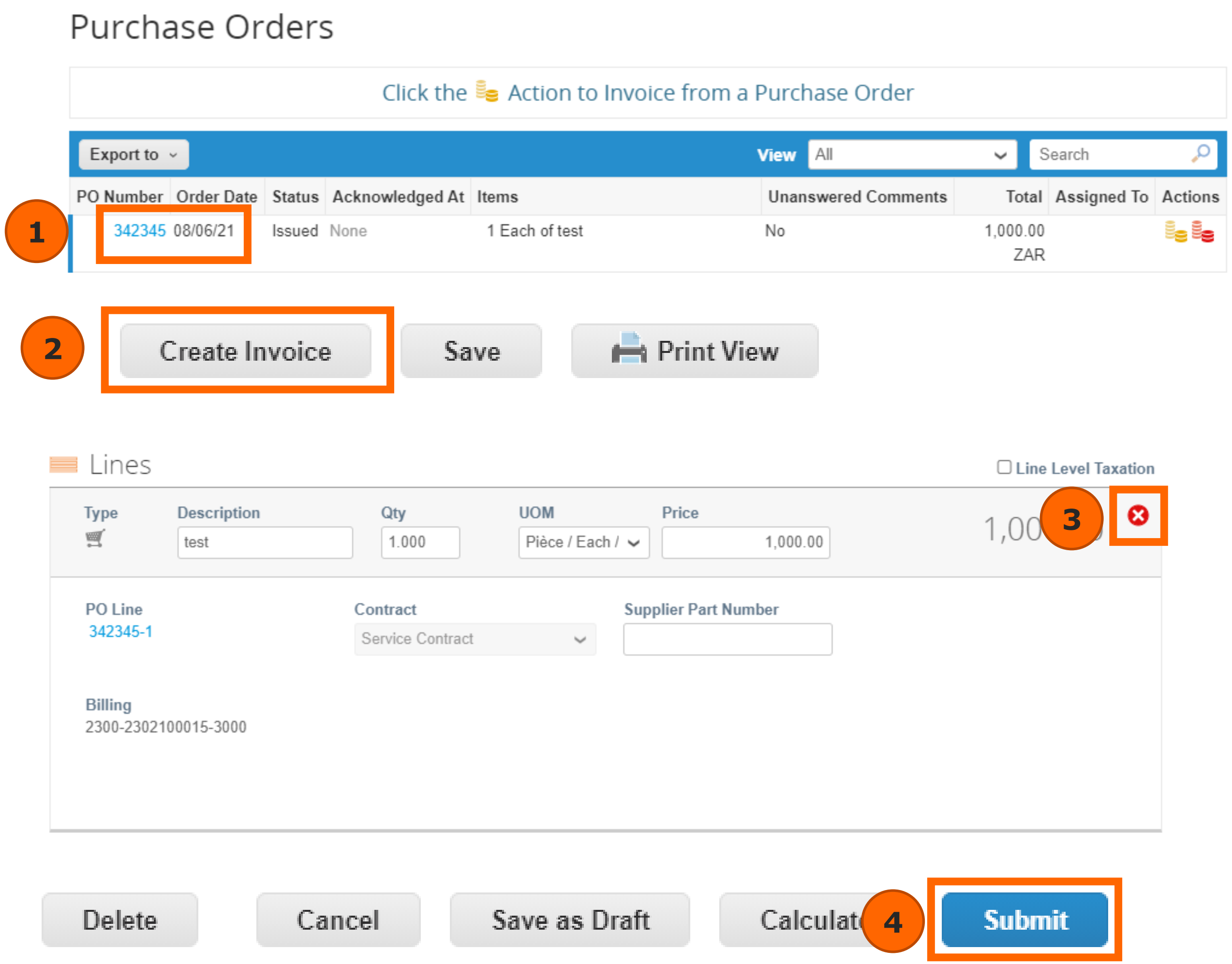
NOTE: If the invoice is incomplete, you will be requested to supply the required information

5.3 Creating a Partial Invoice from a Purchase Order

In this section the creation of a partial invoice is demonstrated

1. Navigate to the **Orders** tab and select the purchase order for which you want to create an invoice.
2. Verify the purchase order data and click on create invoice
3. Complete the invoice general info section. In the **Lines** section, delete any purchase order lines that should not be included in the invoice using the **Delete Line** icon ⊗. Do not use a quantity or price of **0** to exclude a line. For partial invoicing, adjust the **Qty** field to the amount being invoiced.
4. **Complete the tax information and click on submit**

NOTE: To invoice the remaining lines you must search the purchase order again and invoice the remaining lines. The ones you have already invoiced will appear as zero, you must remove them from the invoice.



5.3 Creating a Partial Invoice from a Purchase Order

In this section the creation of a partial invoice is demonstrated

1. Navigate to the **Orders** tab and select the purchase order for which you want to create an invoice.

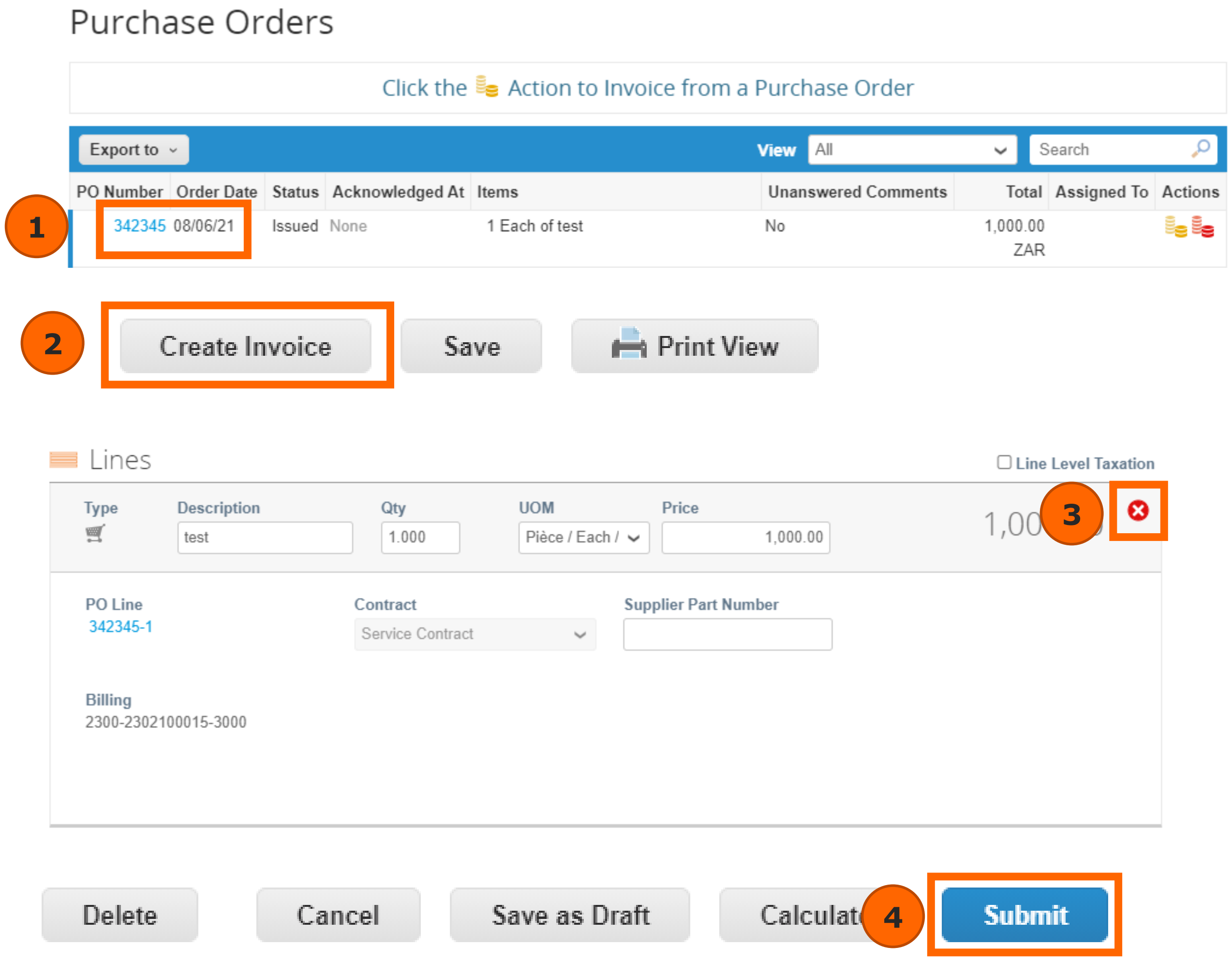
2. Verify the purchase order data and click on create invoice

3. After completing the General Info section. Review the purchase order lines and determine which items you want to include on the invoice.

   For a partial invoice: Adjust the **Qty** field for each line to reflect only the quantity being invoiced.

   To exclude a line completely: Click the **Delete Line** icon ❌ to remove it from the invoice. **Do not** set the quantity or price to **0** to exclude a line, as this is not supported.

4. Complete the tax information and click on **Submit**



5.4 Monitoring invoice status

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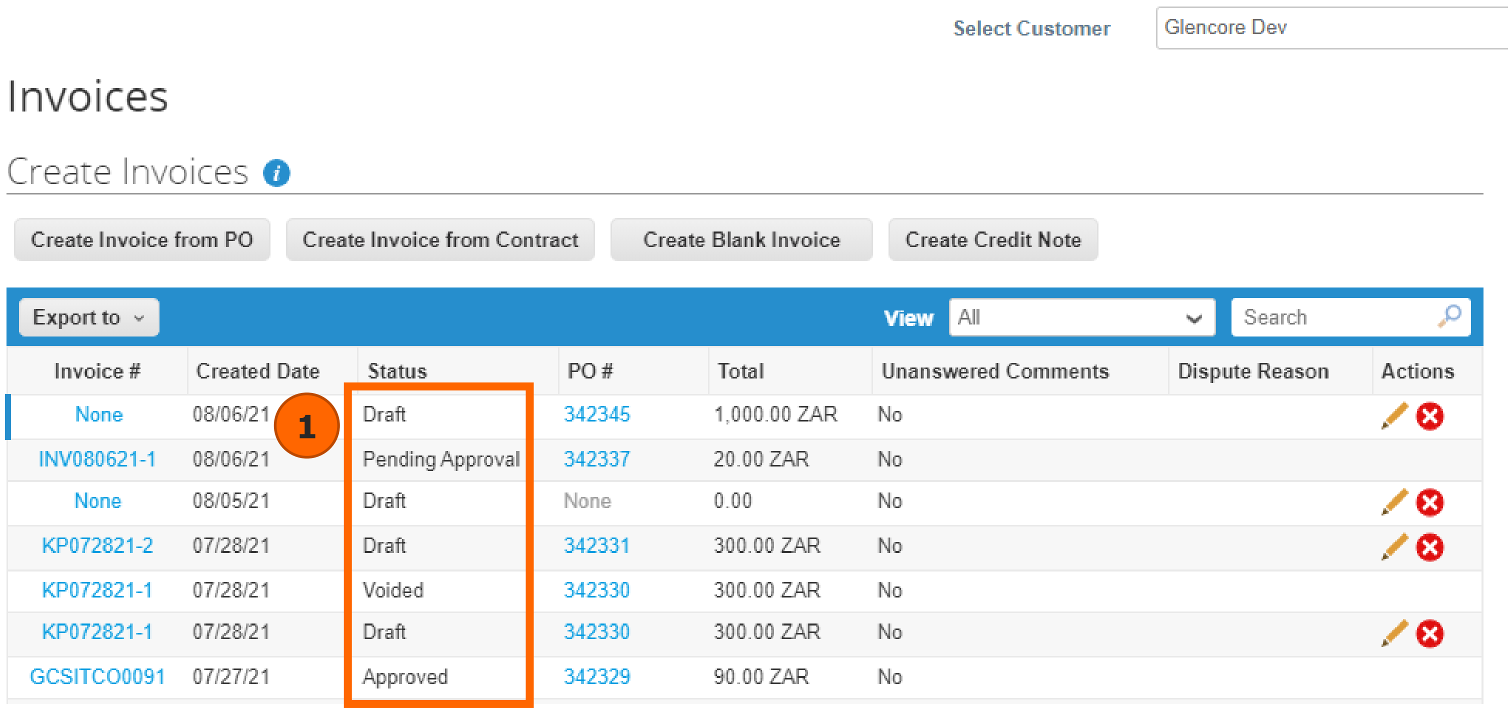
In this section you will see how to monitor the status of an invoice submitted to Astron Energy

1 Use the **Invoices** tab to monitor the progress of your invoices. The invoice list displays the current status of each invoice, indicating its stage in the approval and payment process. The definitions of the available invoice statuses are explained on the following page



Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	08/06/21	Draft	342345	1,000.00 ZAR	No		
INV080621-1	08/06/21	Pending Approval	342337	20.00 ZAR	No		
None	08/05/21	Draft	None	0.00	No		
KP072821-2	07/28/21	Draft	342331	300.00 ZAR	No		
KP072821-1	07/28/21	Voided	342330	300.00 ZAR	No		
KP072821-1	07/28/21	Draft	342330	300.00 ZAR	No		
GCSITCO0091	07/27/21	Approved	342329	90.00 ZAR	No		

Invoice statuses explained

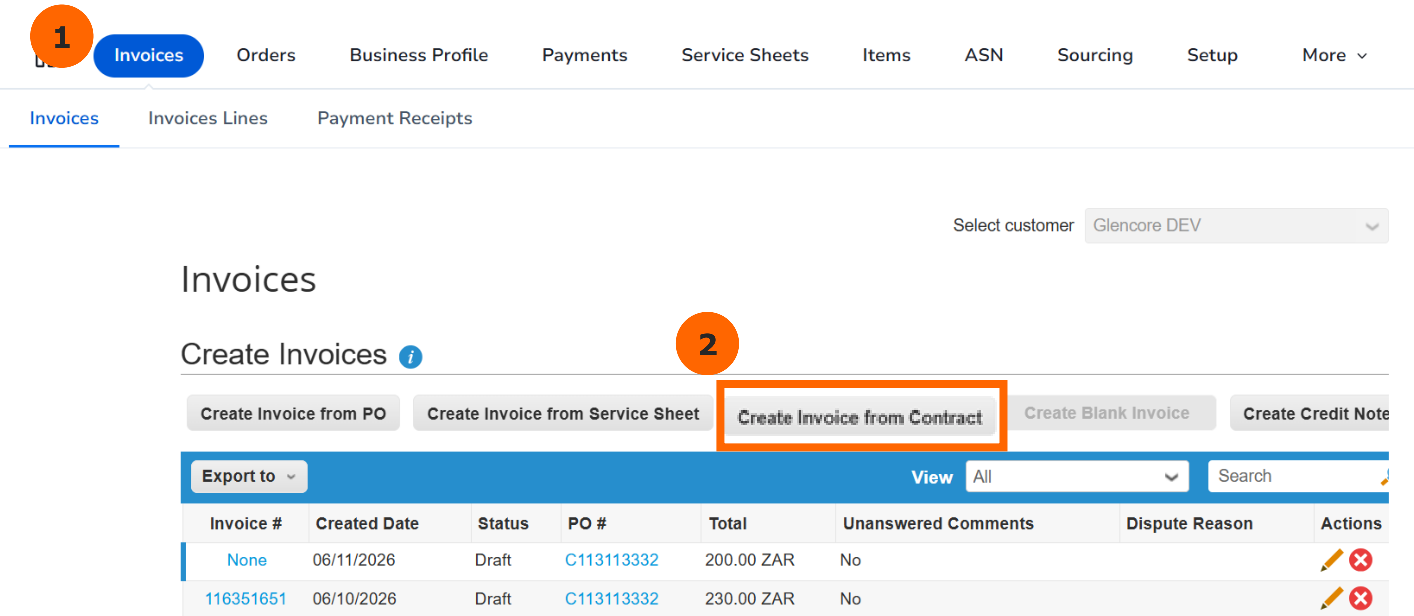
Invoice Status	Description
Approved	The invoice has been accepted for payment by Astron Energy and payment will be made in line with the payment terms of the PO.
Disputed	The invoice has been disputed. Astron Energy must give a reason for the dispute and leave additional comments for you while the invoice is in disputed status. To resolve the dispute, you need to review and correct the mistakes using a credit note.
Draft	A draft invoice has been created against a specific PO, but it has not been submitted to Astron Energy. These invoices can be edited and submitted at any time.
Pending Approval	The invoice is being processed and is either pending the receipt of the goods/service, or a tolerance was exceeded and requires someone at Astron Energy to approve the change. Examples of tolerances include additional shipping/handling/misc. fees being added to the invoice, price discrepancies, QTY discrepancies, etc.
Voided	The invoice has been voided. Typically, this will happen automatically after an invoice has been disputed. Submit a valid invoice to ensure the corrected invoice will be paid.

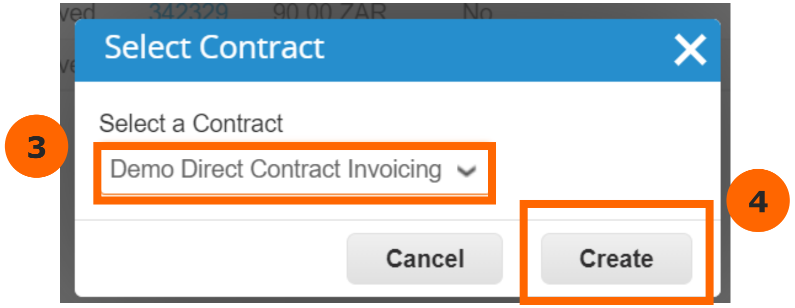
Create an invoice from a contract

6.1 Creating an invoice from a contract

In this section you will learn how to create an invoice from a contract through the CSP. This section will only be available to those suppliers that have service contracts with Astron Energy

1. Go to the **Invoices** tab
2. Click on the option to **Create An Invoice From A Contract**
3. Search for the contract you wish to generate the invoice from
4. Click on **Create** to begin the invoice from contract creation





NOTE: The contracts you have with Astron Energy will appear in the drop-down list. This option may not always be enabled

6.2 Creating an invoice from a contract

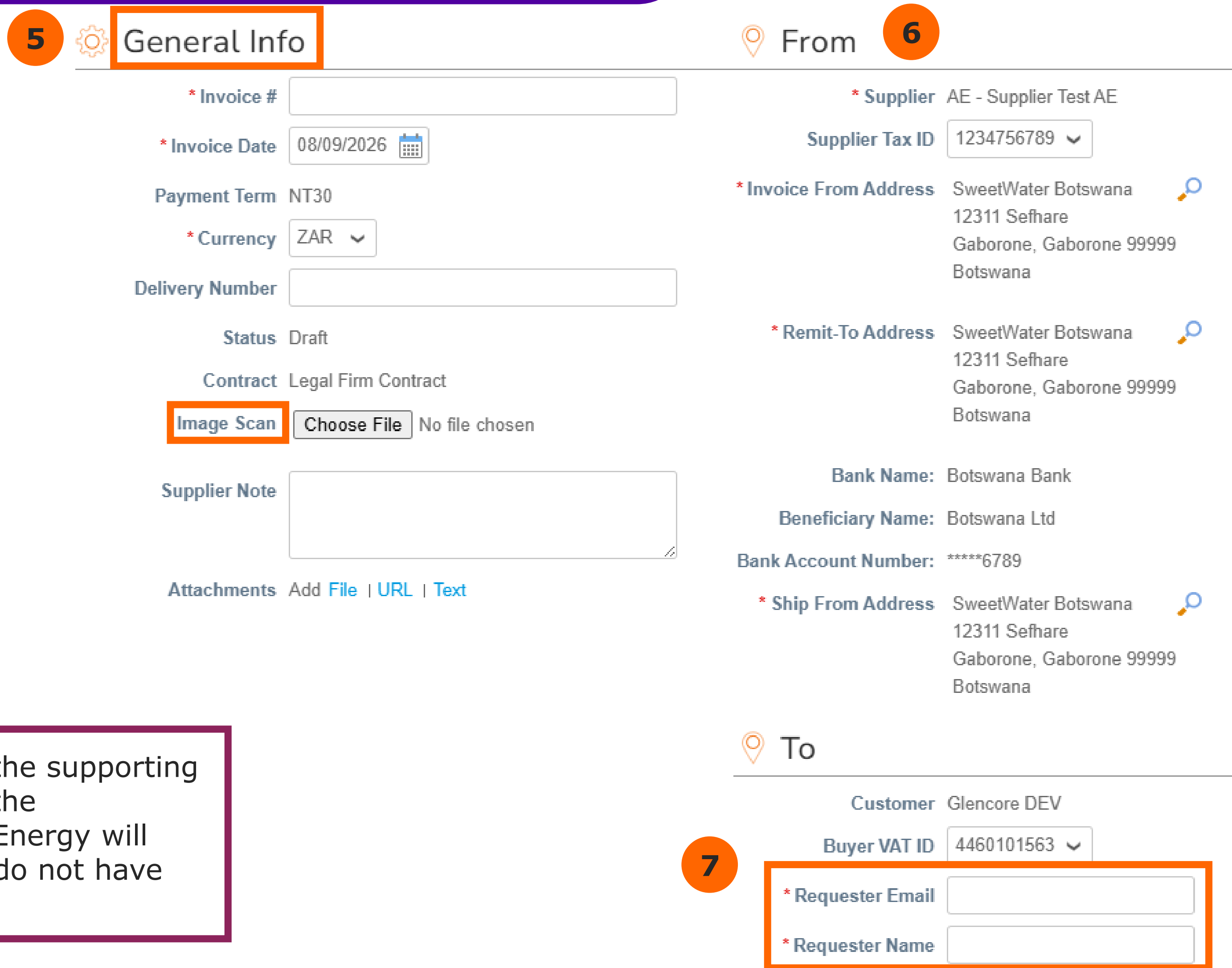
In this section you will learn how to create an invoice from a contract through the CSP. This section will only be available to those suppliers that have service contracts with Astron Energy

5 Complete the **General Info** section. If **outside of South Africa**, upload your company's invoice in the **Image Scan** field.

5 Submit all supporting documents in the **Attachment** section, these required documents can be Delivery notes or Service Entry Sheets, for example. Refer to your Astron Energy contact to determine the supporting documents required.

6 Verify the information in the **From** section

7 Complete the information in the **To** section. Add the name and email address of your Astron Energy contact in the **requester** fields



5 General Info

* Invoice #	
* Invoice Date	08/09/2026
Payment Term	NT30
* Currency	ZAR
Delivery Number	
Status	Draft
Contract	Legal Firm Contract
Image Scan	Choose File No file chosen
Supplier Note	
Attachments	Add File | URL | Text

From 6

* Supplier	AE - Supplier Test AE
Supplier Tax ID	1234756789
* Invoice From Address	SweetWater Botswana 12311 Sefhare Gaborone, Gaborone 99999 Botswana
* Remit-To Address	SweetWater Botswana 12311 Sefhare Gaborone, Gaborone 99999 Botswana
Bank Name:	Botswana Bank
Beneficiary Name:	Botswana Ltd
Bank Account Number:	*****6789
* Ship From Address	SweetWater Botswana 12311 Sefhare Gaborone, Gaborone 99999 Botswana

To

Customer	Glencore DEV
Buyer VAT ID	4460101563
7 * Requester Email	
* Requester Name	

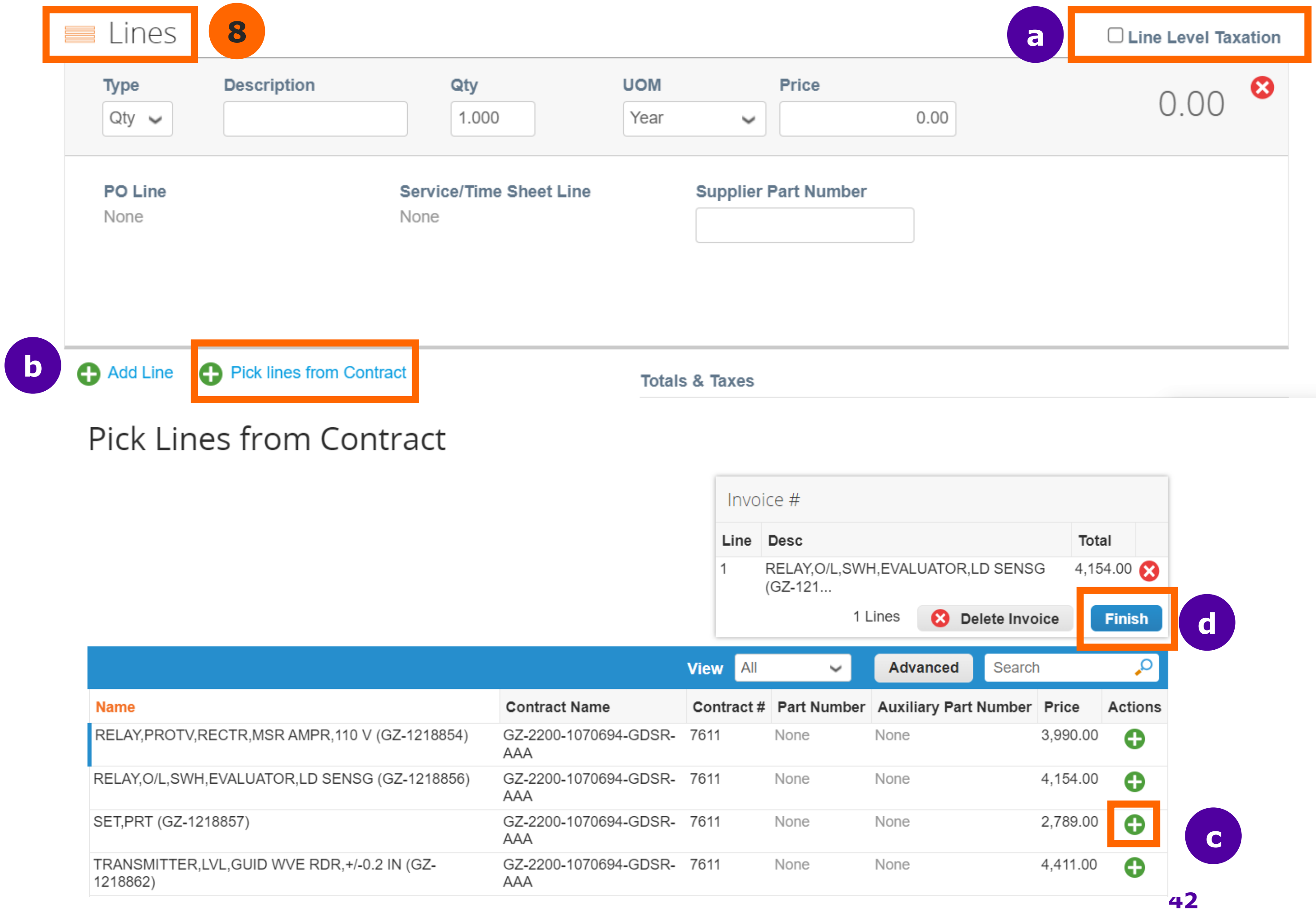
NOTE: Remember to attach the supporting documentation requested in the attachments section. Astron Energy will not accept the invoice if you do not have the appropriate attachments.

6.3 Creating an invoice from a contract

In this section you will learn how to create an invoice from a contract through the CSP

8 Find the lines or items associated to the invoice here and complete all necessary information.

- **a** You may have the option to select tax at the line level. If you select this option, you will have to specify a tax code for each line of the invoice
- **b** Click to add lines from the contract in the invoice
- **c** Add items from the contract by clicking the icon
- **d** Once the lines are added, click **Finish**



6.4 Creating an invoice from a contract

In this section you will learn how to create an invoice from a contract through the CSP

9 Click to add the taxes associated to the invoice. (only if line level taxation is disabled)

10 Click these buttons for invoice management

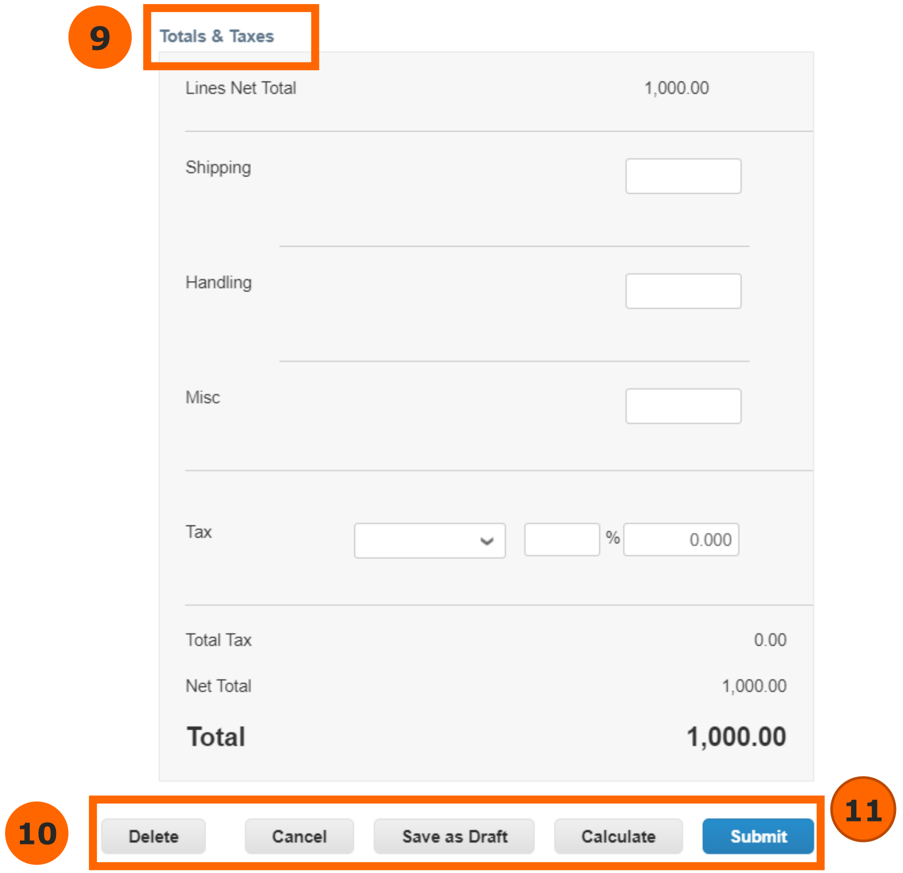
Delete: delete the draft invoice.

Cancel: Cancels the invoice after it has been submitted

Save as draft: You will be able to save the invoice and continue editing it later.

Calculate: The invoice total is updated, including added taxes and other fees.

11 Click on **Submit**. The invoice has been sent to Astron Energy.



Confirmation of invoice payment

7.1 Confirmation of invoice payment

In this section you will learn how to verify the payment of an invoice made by Astron Energy

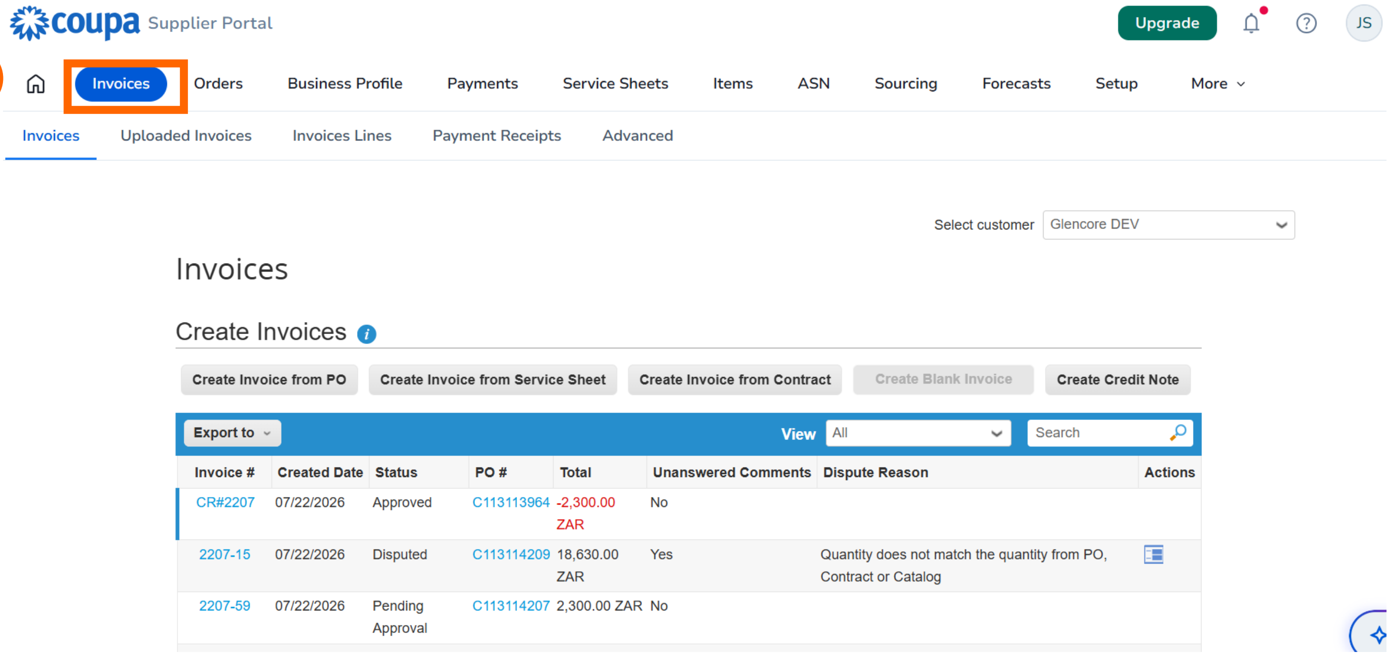
1 In the invoices section look for the invoice you want to verify, Click on the invoice number

The invoice status must be in approved status

2 Go to the payment section at the bottom of the invoice and you will be able to verify the amount paid, the date and description.

NOTE: The payment section relates to the corresponding invoice.

1



2

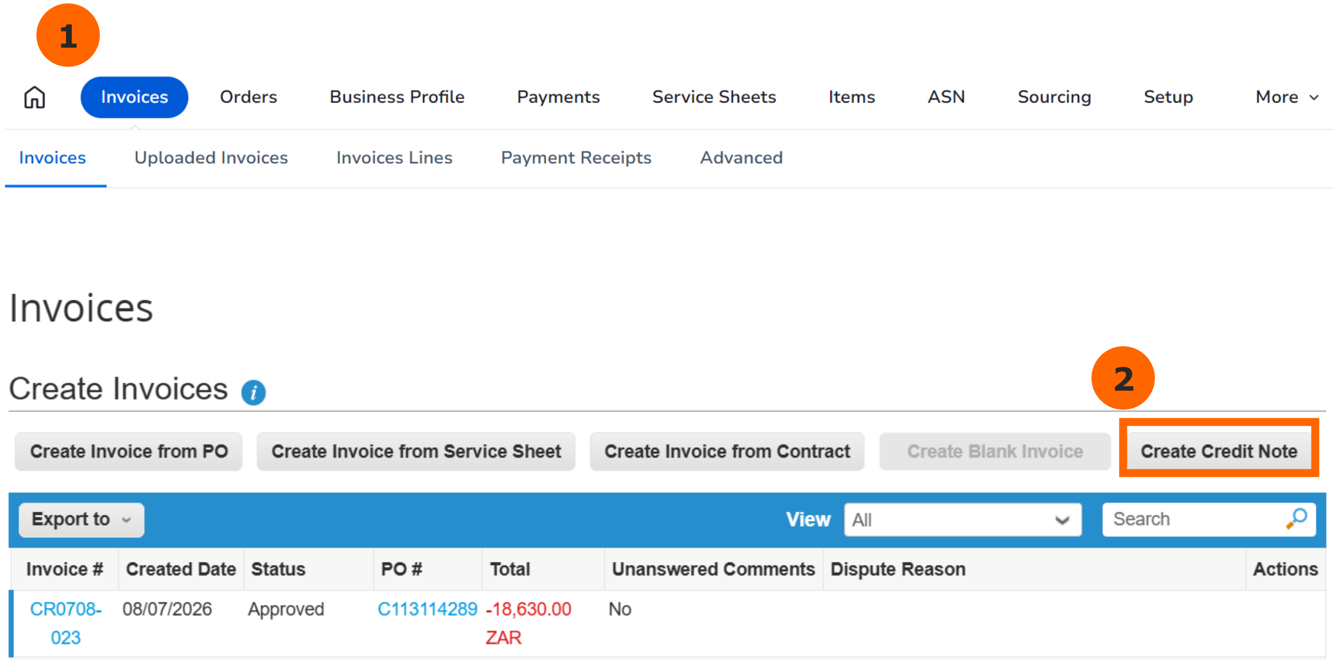
Create a credit note

8.1 Create a credit note

In this section you will learn how to create a credit note through the supplier portal

1 In the **Invoices** tab you can view invoices previously created and create credit notes

2 In the create invoices section click **Create Credit Note**



8.2 Create a credit note

In this section you will learn how to create a credit note through the supplier portal

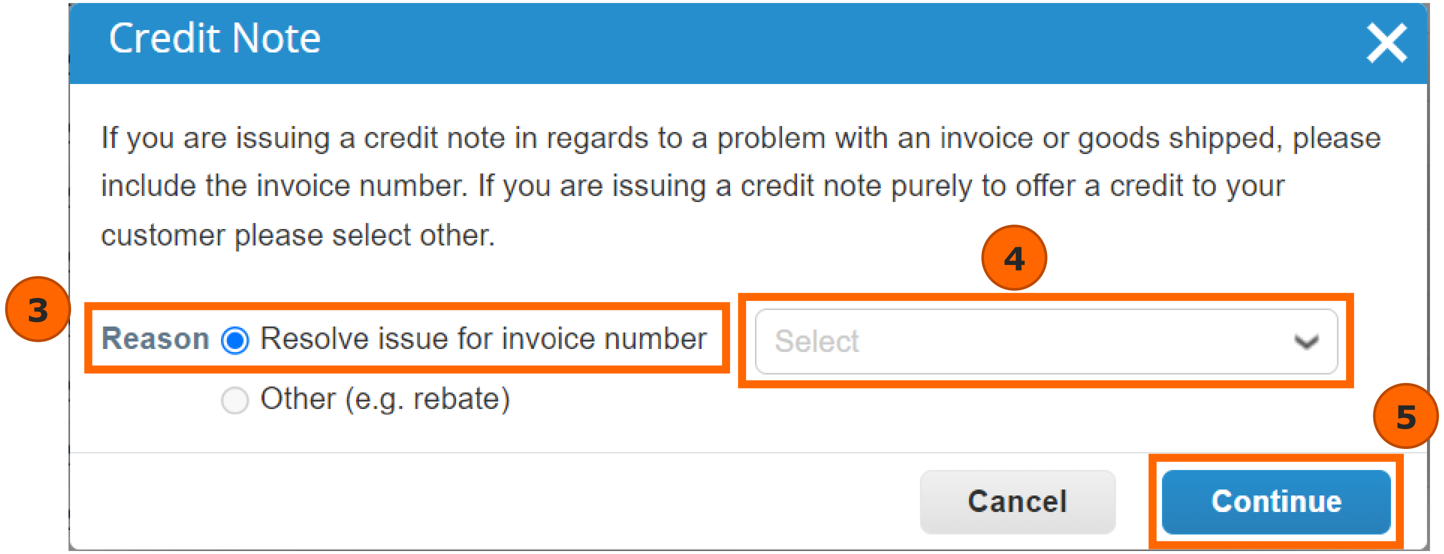
3 Select a reason for the credit note, to resolve an issue with a particular invoice or Other

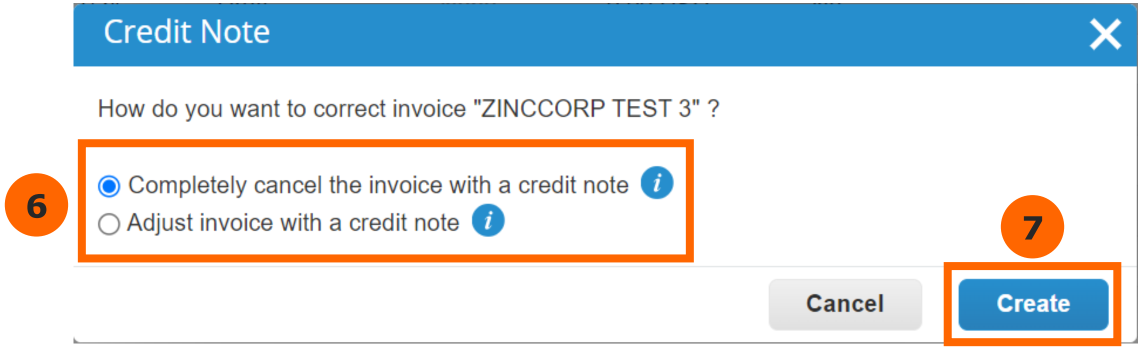
4 Select the invoice number from the drop-down menu for which you want to create a credit note

5 Click **Continue**

6 Choose the option to either **completely cancel** the invoice with credit note or to **adjust the invoice** with credit note

7 Click **Create** to complete the credit note creation process





8.3 Create a credit note

In this section you will learn how to create a credit note through the supplier portal

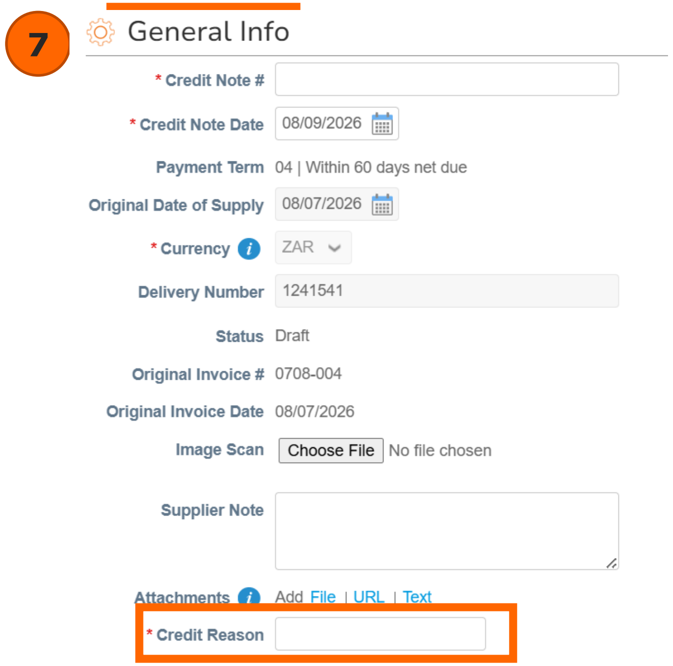
7 Complete the **General Info** section with a credit note #, credit note date, and provide a **credit reason** for the credit note.

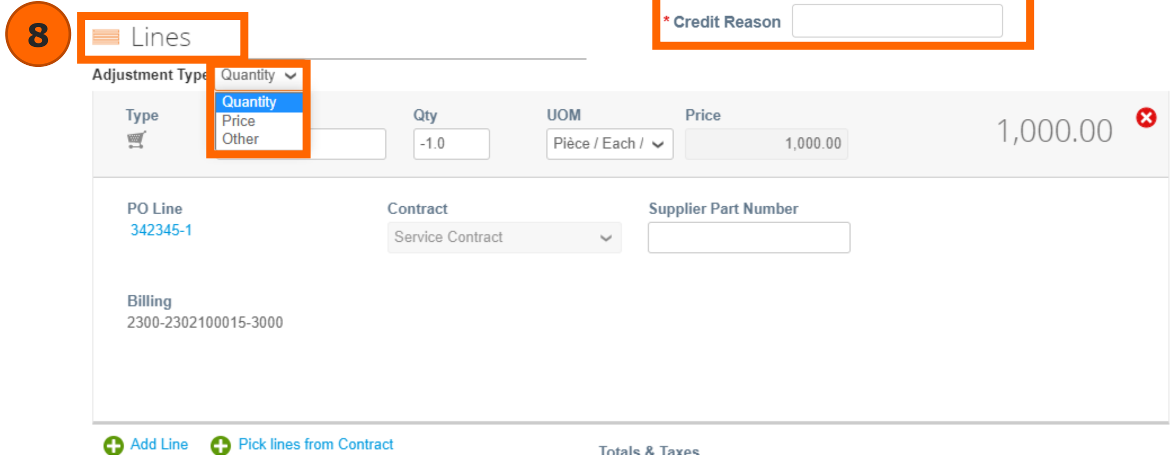
8 Select the **Adjustment Type** you wish to make in the **Lines** section

Quantity: Allows changes related to the quantity of the purchase order.

Price: Allows changes related to price adjustments. Must be negative (-)

Other: This change allows for price and quantity changes.





8.4 Create a credit note

In this section you will learn how to create a credit note through the supplier portal

9 Review the **Totals & Taxes** section

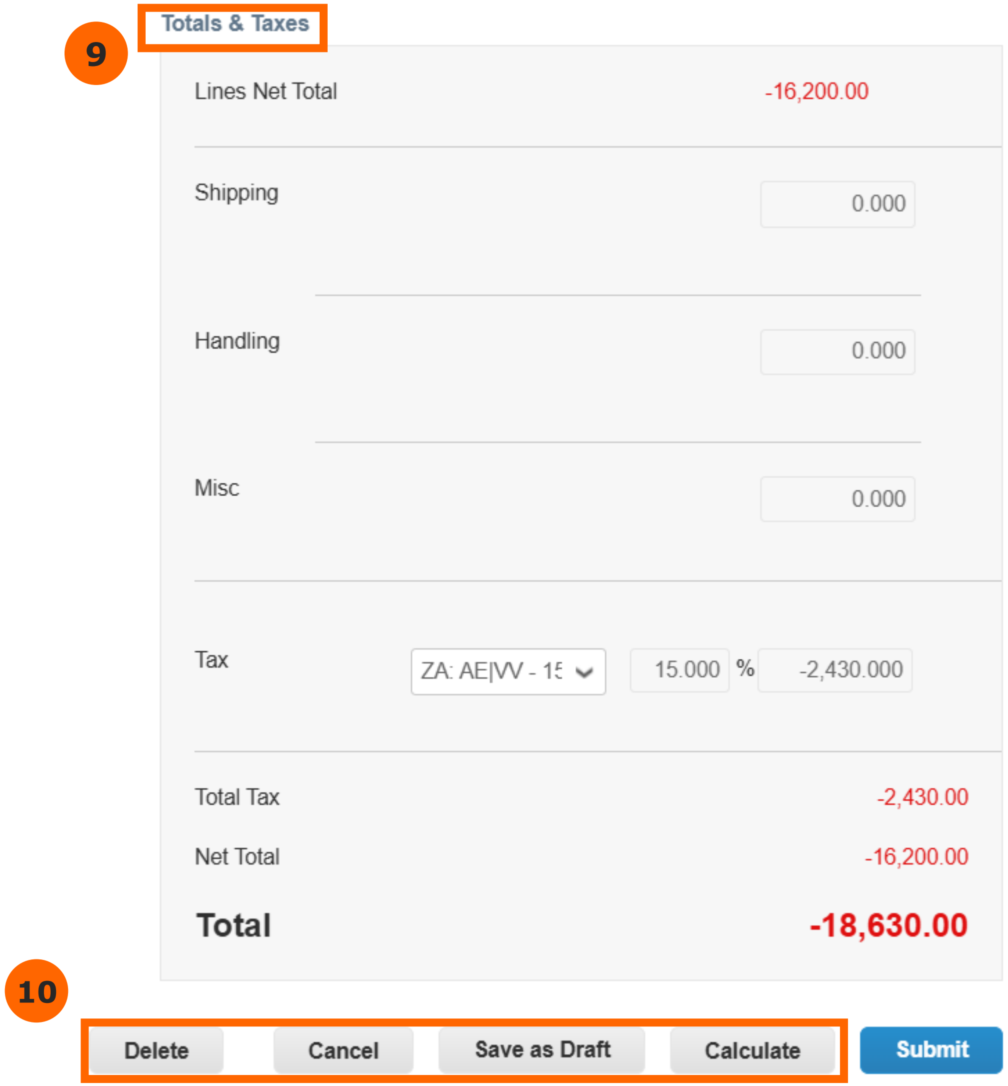
10 Options for credit note management

Delete: Deletes the current draft of the invoice

Cancel: Cancels the invoice if it has already been submitted

Save as draft: Save the invoice and continue editing it later.

Calculate: The invoice total is updated, including tax added



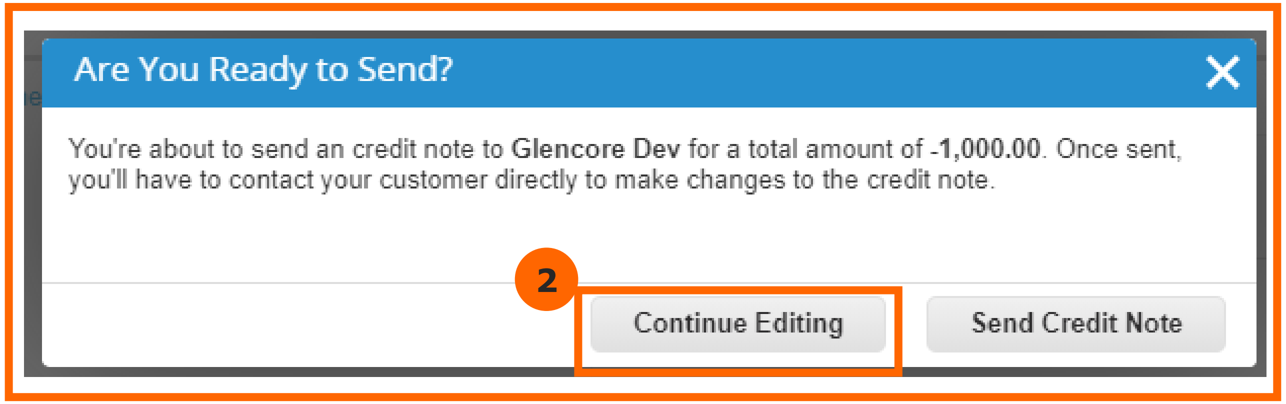
8.5 Create a credit note

In this section you will see notifications when sending credit notes

1 Once submitted, a notification box will appear each time you send a credit note to confirm submission of the credit note

2 Click **Continue Editing** to return to the invoice and complete any missing information.

1



8.6 Create a credit note

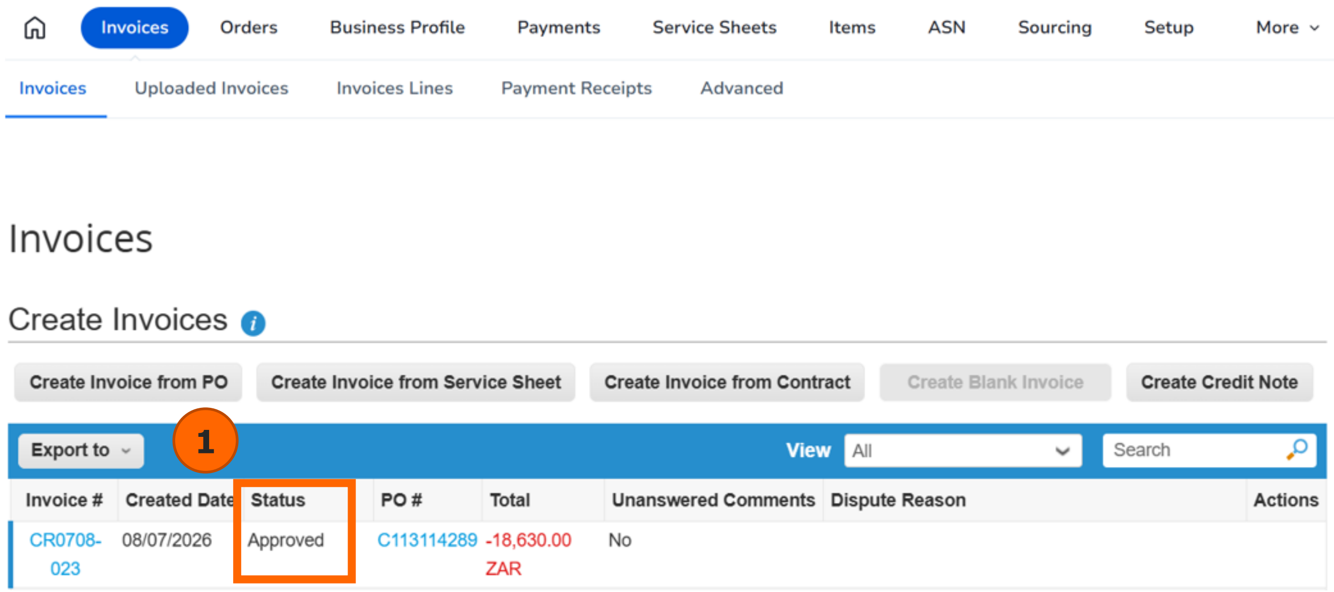
In this section you will see the status of the credit note

1. In the invoice tab, you will find the **Status** of the credit note you created. The statuses displayed are:

   Approved: The credit note has been approved

   Pending Approval: The credit note is pending approval by Astron Energy.

   Draft: Refers to a credit note that is being managed but has not yet been sent.



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Catalogue Pricing Update

9.1 Catalogue update

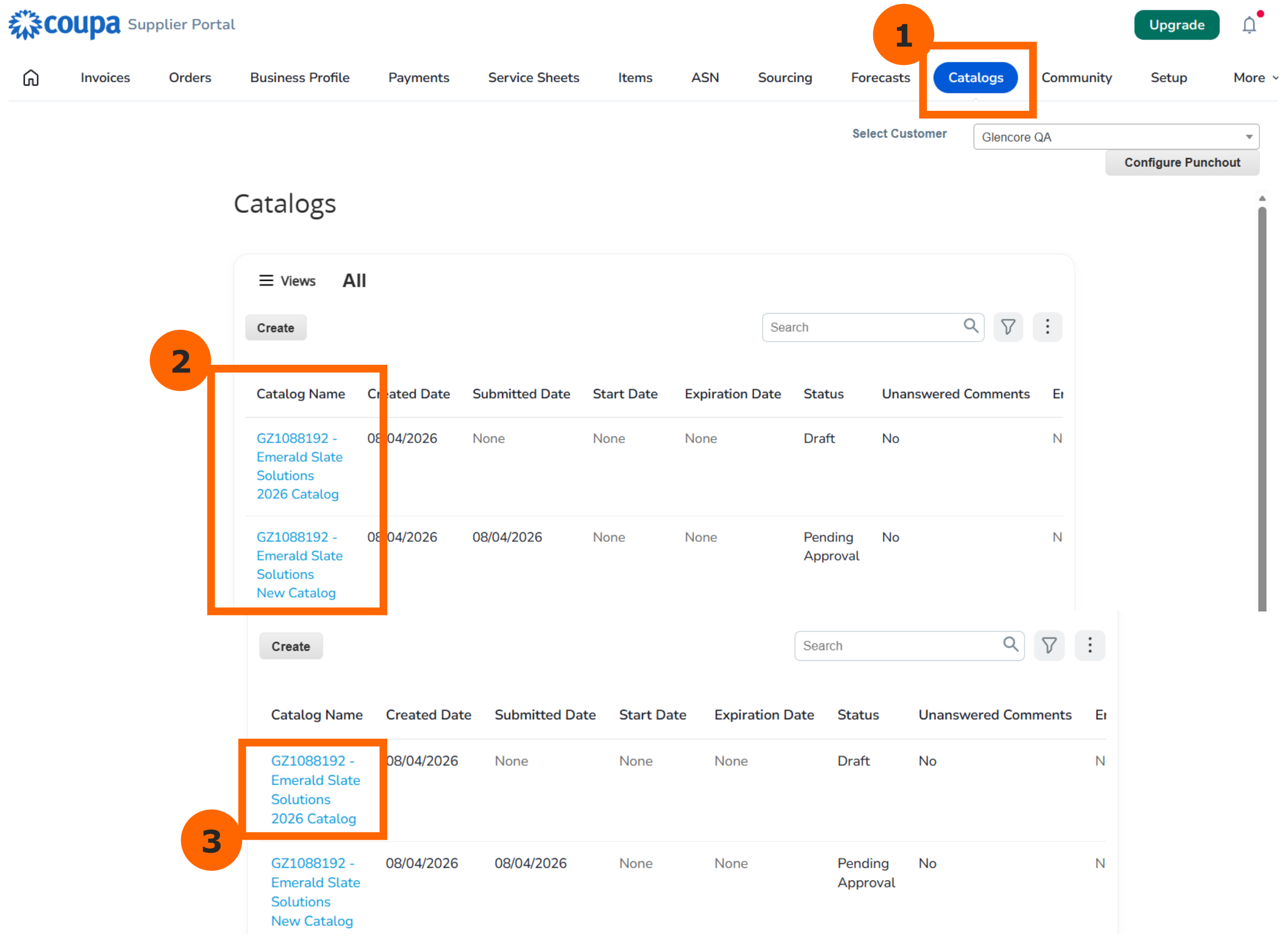
Throughout this section, you will learn how you can update your catalogue pricing directly in the Coupa Supplier Portal

NOTE: Suppliers may only adjust the pricing for items on offer to Astron Energy. Please note that not all suppliers may have a catalogue and that Astron Energy will load all initial catalogues for suppliers.

1. Go to the **Catalogs** tab on the Coupa Supplier Portal

2. Find the approved catalogue you wish to update pricing for in the available catalogue list

3. Click **Create** to create a new catalogue that will contain the new pricing.

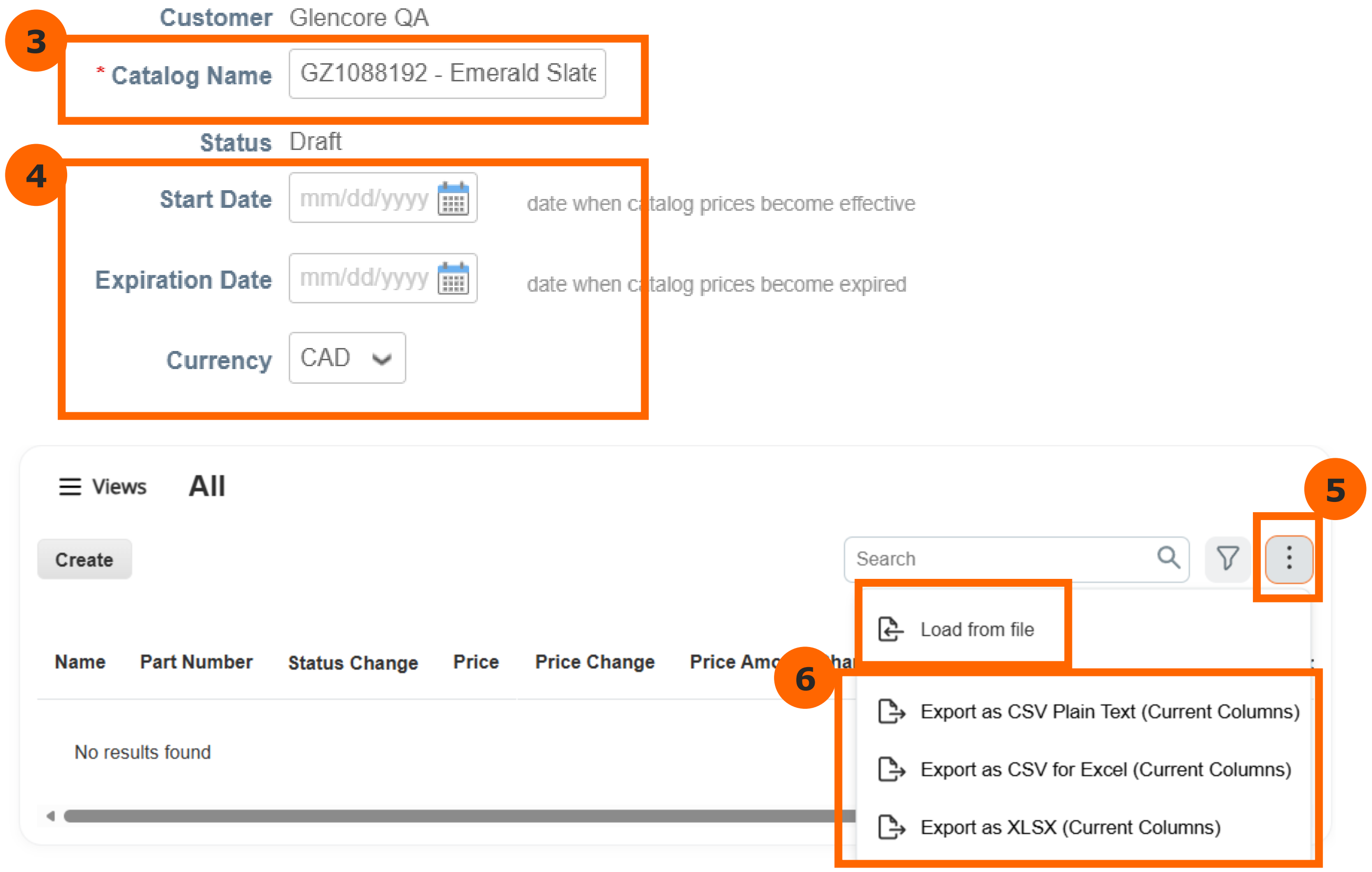


9.2 Catalogue update

Throughout this section, you will learn how you can update your catalogue pricing directly in the Coupa Supplier Portal

3. Adjust the catalogue name (See **Note** for naming conventions)
4. Add the Start Date, Expiry date and currency of the catalogue, as appropriate
5. Click the ellipses next to the search bar to **Load From File** and use an Excel template to adjust the prices
6. Export the items list on offer to Astron Energy

NOTE: The catalogue name must retain the original taxonomy, as it is essential for catalogue approval. Please use the same name as the buyer did in the initial catalogue, and append "V2" or a version identifier of your choice at the end of the name.



9.3 Catalogue update

Throughout this section, you will learn how you can update your catalogue pricing directly in the Coupa Supplier Portal

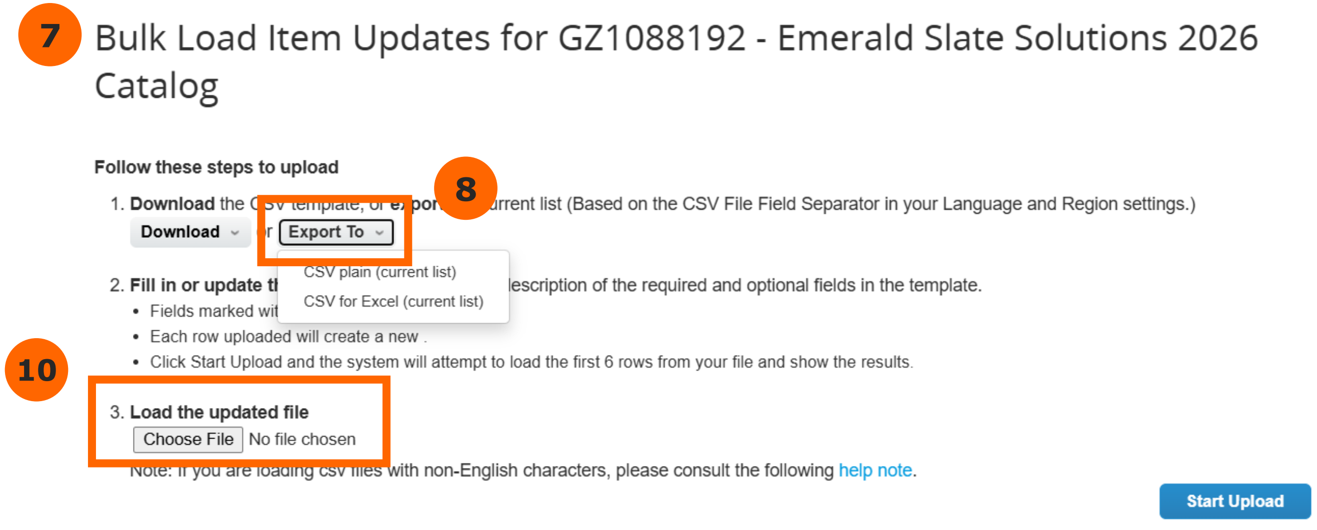
7 Follow the instructions in the Bulk Load Items to complete the pricing update

8 Download the Item List using the **Export to** button

9 Update the prices in the downloaded item list.

10 Choose **Load the updated file** to select the updated file to upload and update the catalogue

11 Press **Submit** to send the catalogue for approval.



9

	A	B	C	D	E	F	G
1	Name	Part Number	Status Change	Price	Price Change	Price Amount Change	Currency
2	Wireless Bluetooth Mou:	TCH-MOU-1001	Active	29.99	ncrease	2.00	CAD
3	27-inch 4K Monitor	TCH-MON-2002	Active	349.99	No Change	0.00	CAD
4	USB-C Docking Station	TCH-DOC-3003	Active	89.50	Decrease	-10.00	CAD
5	Mechanical Keyboard R(	TCH-KEY-4004	Discontinued	74.99	No Change	0.00	CAD
6	1TB NVMe SSD	TCH-SSD-5005	Active	109.99	ncrease	5.00	CAD

Supplier onboarding

10.1 Supplier onboarding

This section will explain how to respond to a request for information from Astron Energy

1. You will receive an email from Astron Energy that an action is required from you.

2. From the received email, click on **Log in**

1

Hello Supplier,

Astron Energy has requested you to update information about your company. This information is required so they can transact with you electronically.

Use the "Log In" button to update your information under Information requests in the CSP

Astron Energy

2

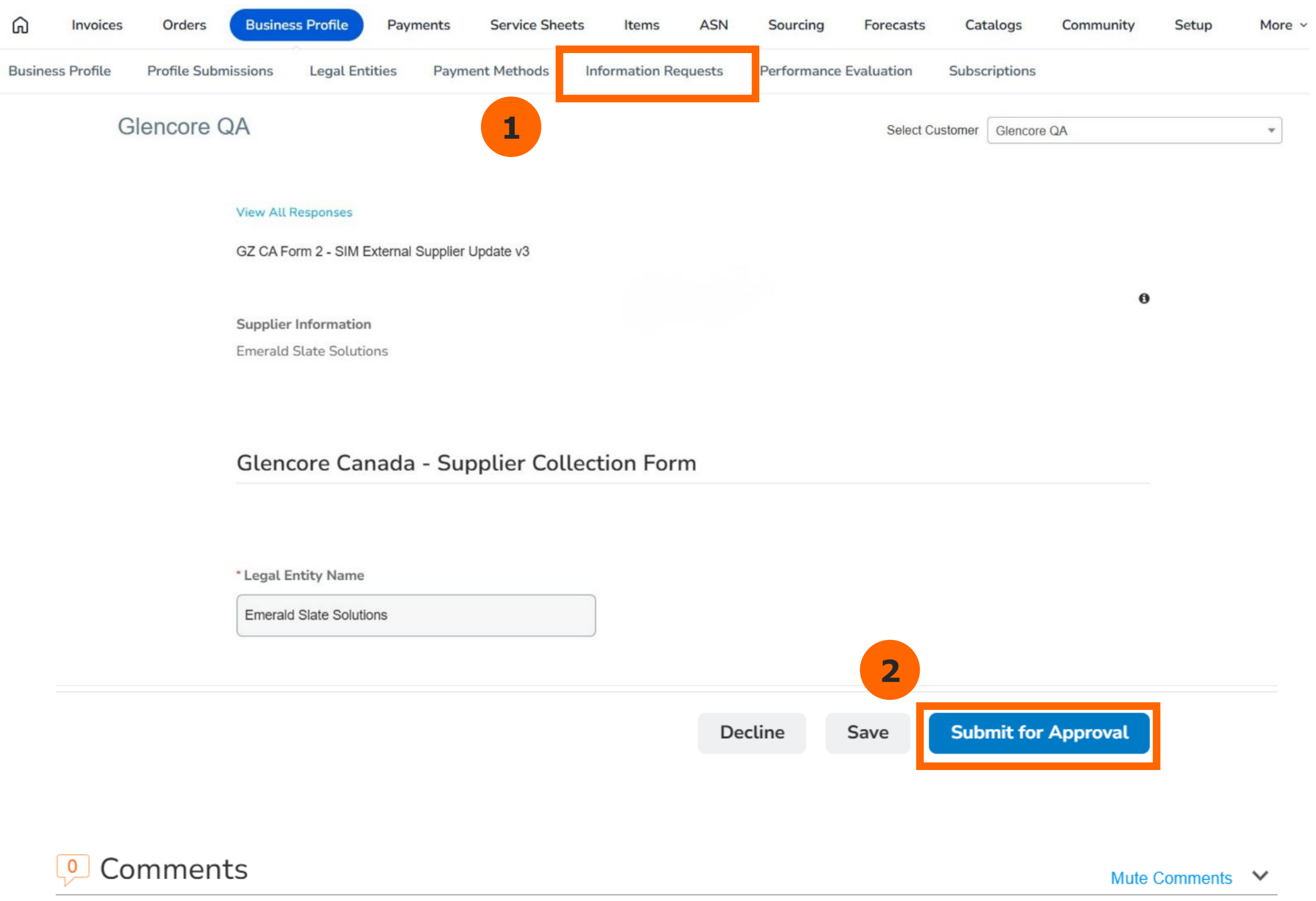
Log In

10.2 Supplier onboarding

This section will explain how to respond to a request for information from Astron Energy

1 Under the Business Profile tab, go to information requests

2 Complete the form and all the required information and send your response.



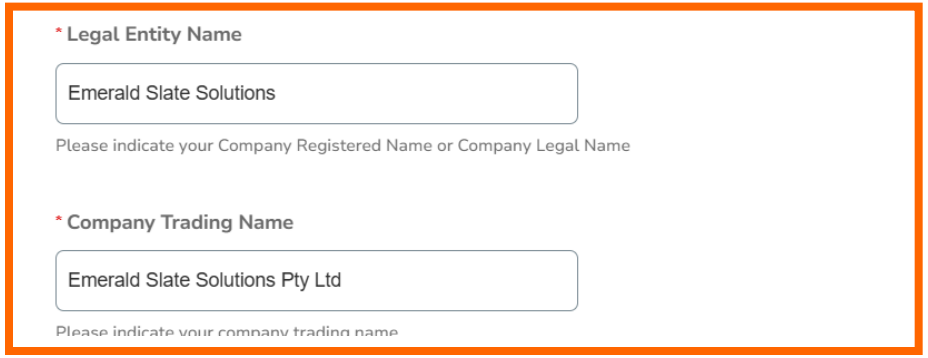
10.3 Supplier onboarding

This section will explain how to respond to a request for information from Astron Energy

1. There are multiple required fields that have been determined by Astron Energy. These fields will have a red asterisk next to the question.

2. For banking details, ensure that all the fields that apply to your company are filled in. Not all fields that apply to your company will be required on the form.

1



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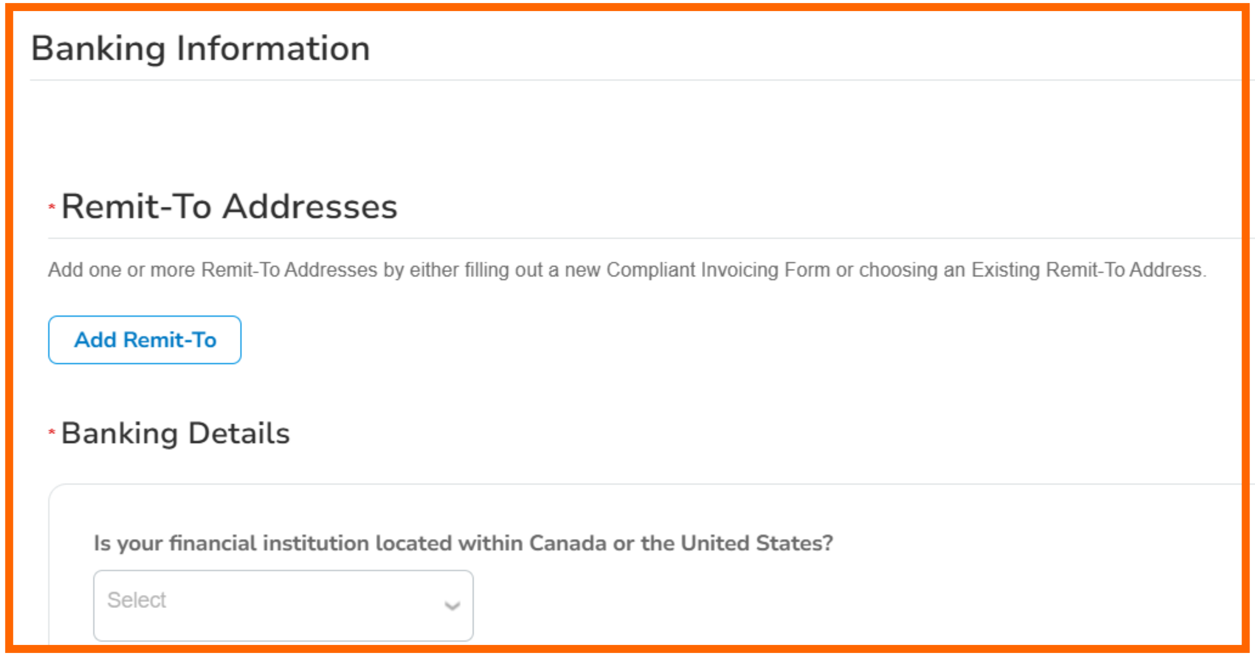


Setup tab and adding users

11.1 Setup Tab

The portal contains some features that may not be enabled for your use. The following is a short description of the setup tab and some administrator functions.

Admin Users

- Users — **Administration of platform users. Here you can invite users**
- Worker Portal Access
- Merge Requests — **Merge accounts and manage merge requests.**
- Merge Suggestions
- Requests to Join
- Fiscal Representatives — **Add tax representatives in countries where you are not registered with a local address but need to be registered for tax purposes.**
- Additional CaaS Information
- Early Pay Discounts
- sFTP Accounts — **Option not available**
- cXML Errors
- sFTP File Errors (to Customers) — **Option not available**
- sFTP File Status (from Customers) — **Option not available**

11.2 Adding Users

In this section you will learn how to manage the account profile and add users to the supplier portal

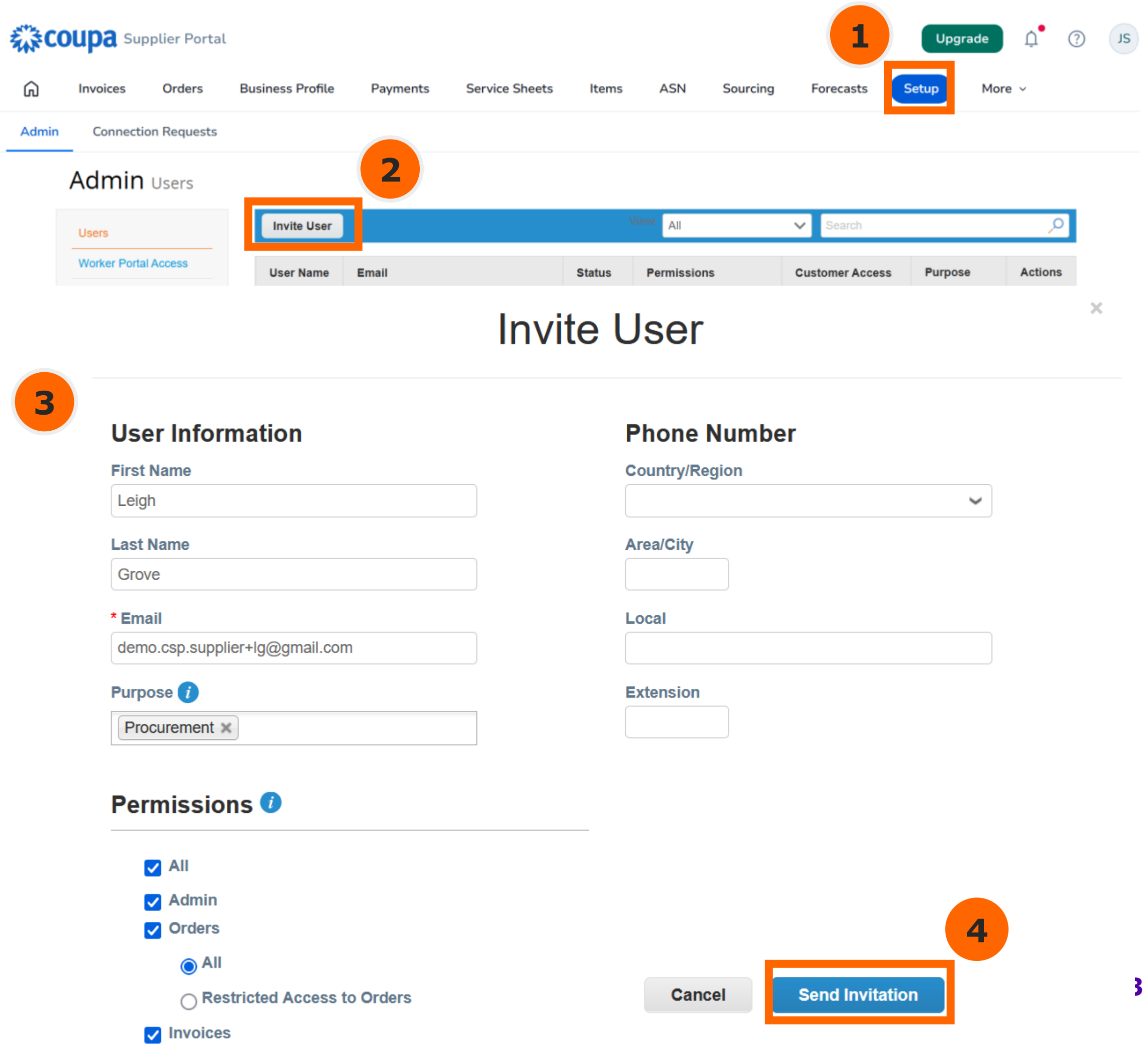
1. As the Admin user, go to the **Setup** tab of the portal.

2. Click on **Invite User**

3. Fill in the required data and select the permissions that will be enabled for the user you are adding.

4. Scroll to the bottom of the pop-up screen and click on **Send Invitation** and the user will be notified

NOTE: Assign a user specific permissions and customers as required. The user will only see tabs and customers they have permission to see.



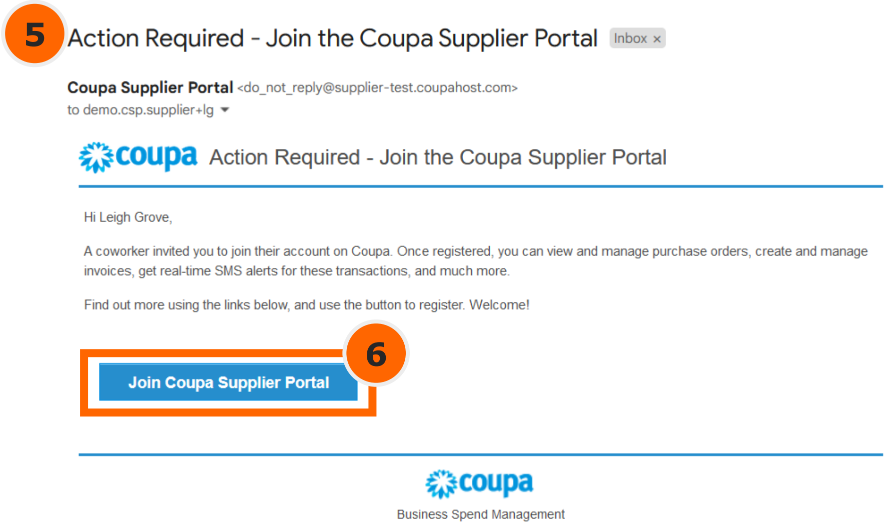
11.2 Adding Users

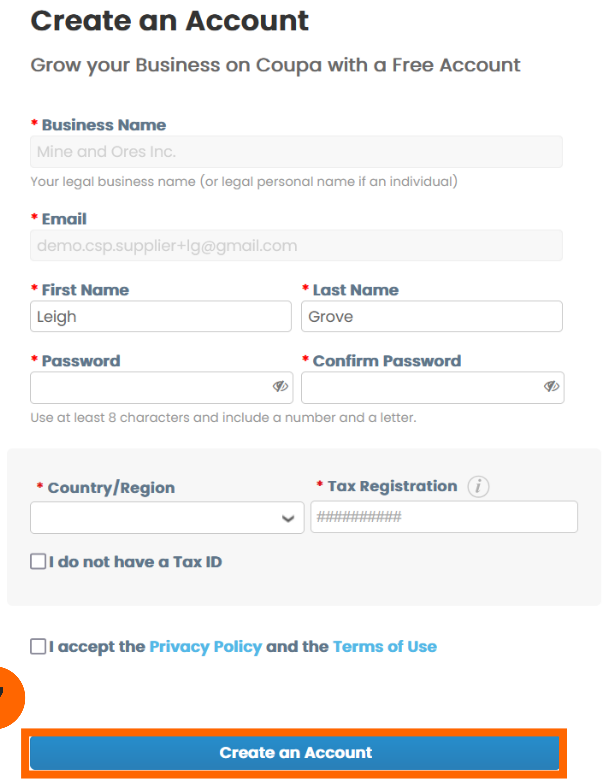
In this section you will learn how to manage the account profile and add new users to the supplier portal

5 The user will receive an email invitation to the CSP

6 As the invited user, click **Join Coupa Supplier Portal**

7 Complete the information to **Create an Account**



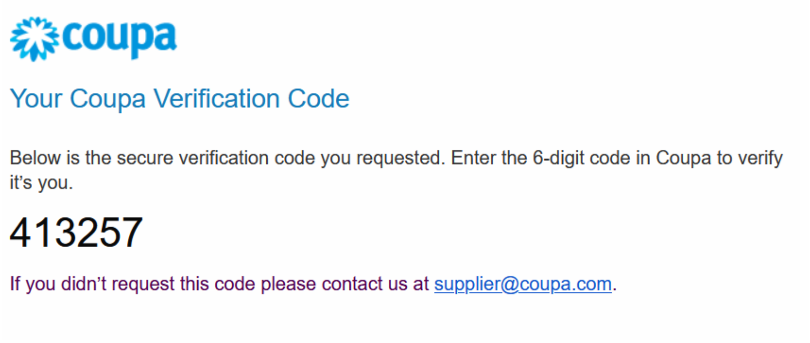


11.2 Adding Users

In this section you will learn how to manage the account profile and add new users to the supplier portal

8 Check your email for a verification number to verify your email address

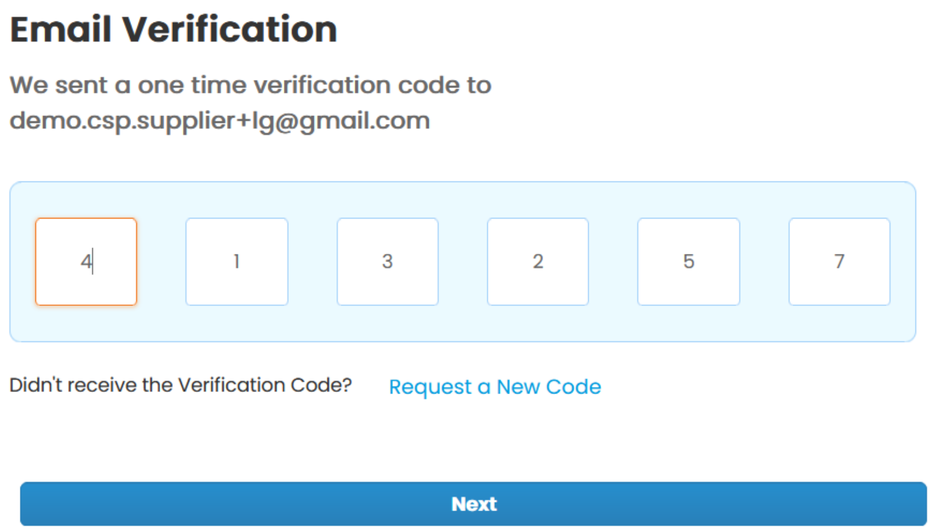
8



9 Copy the code and paste it into the **Email Verification** fields and click **Next**

You are then logged in to the Coupa Supplier Portal and linked to your company's account.

9

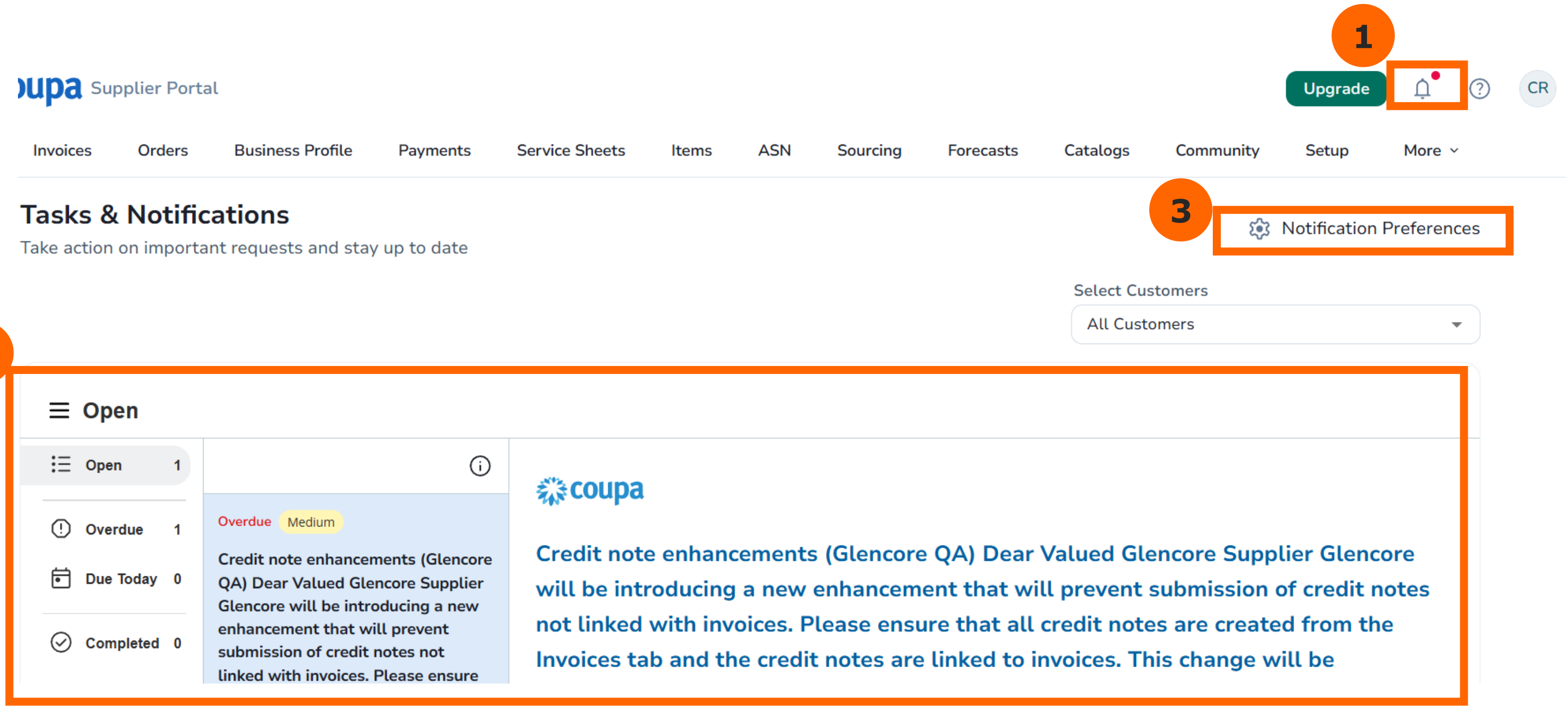


Manage CSP notifications

12.1 Notification management

In this section you will learn how to manage notifications from the supplier portal. You will be able to set it to receive notifications to your email address

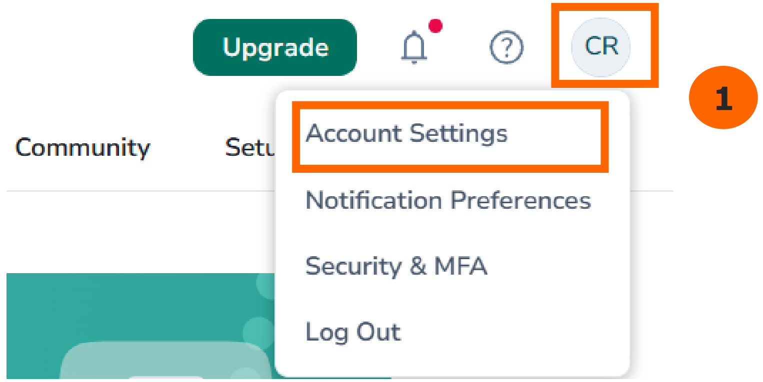
1. Go to the notifications section on the top right-hand side.
2. You will find all the notifications that you have as a supplier, you can configure it to be sent to your email as well.
3. Click on notification preferences to manage notifications. You will be able to set them to be sent to your email address



12.2 Adjust notifications

In this section you will learn how to adjust or configure the account according to your needs.

1. Click on your account name in the upper right-hand corner to change password or add basic profile information

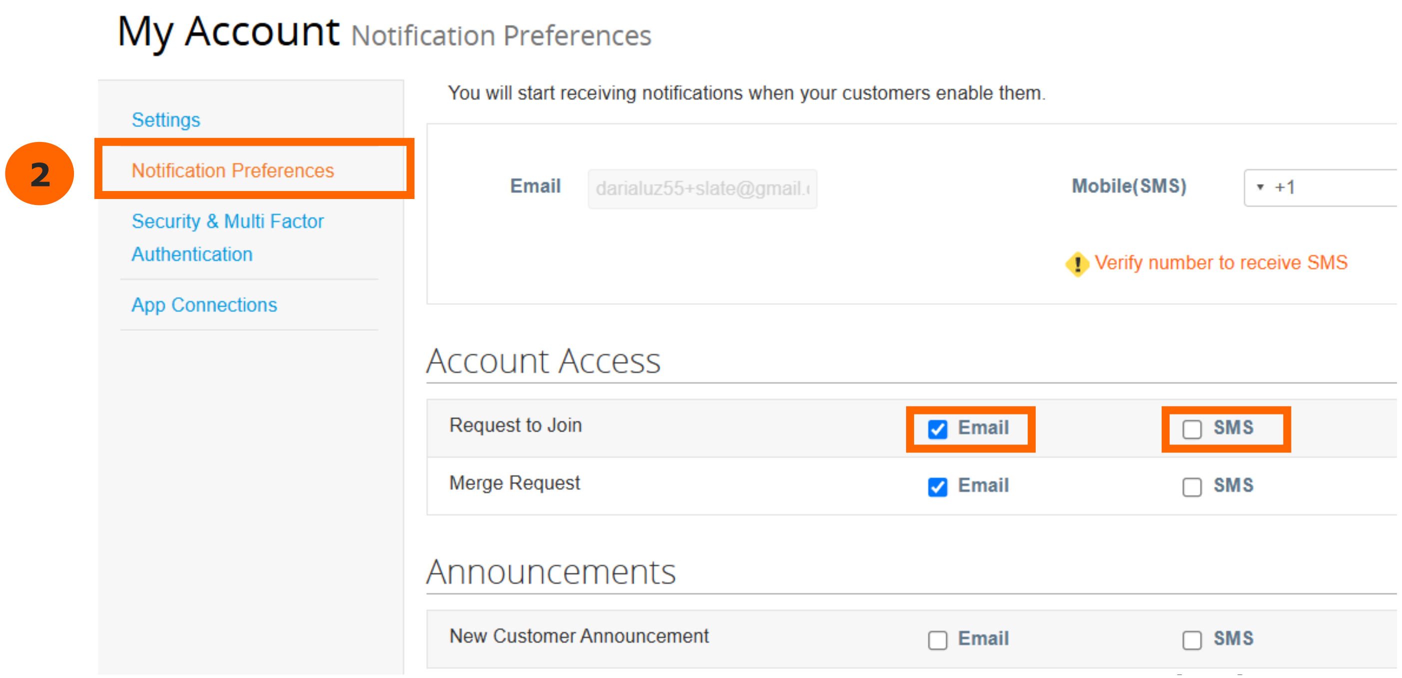


2. You can manage notifications in the **Notification Preferences area**

   Check the **SMS option** if you want to receiveSMS notifications.

   Check the **Email option** if you want notifications to be sent to your e-mail address.

   Scroll to the bottom of the page and click **Save** to save your changes.



Sourcing events (RFQ, RFP)

- Respond to an invitation for a quotation or bidding event
- Using the message option to communicate with Astron Energy
- Uploading information from an Excel file
- Notification of event results if selected

13.1 Invitation to sourcing event

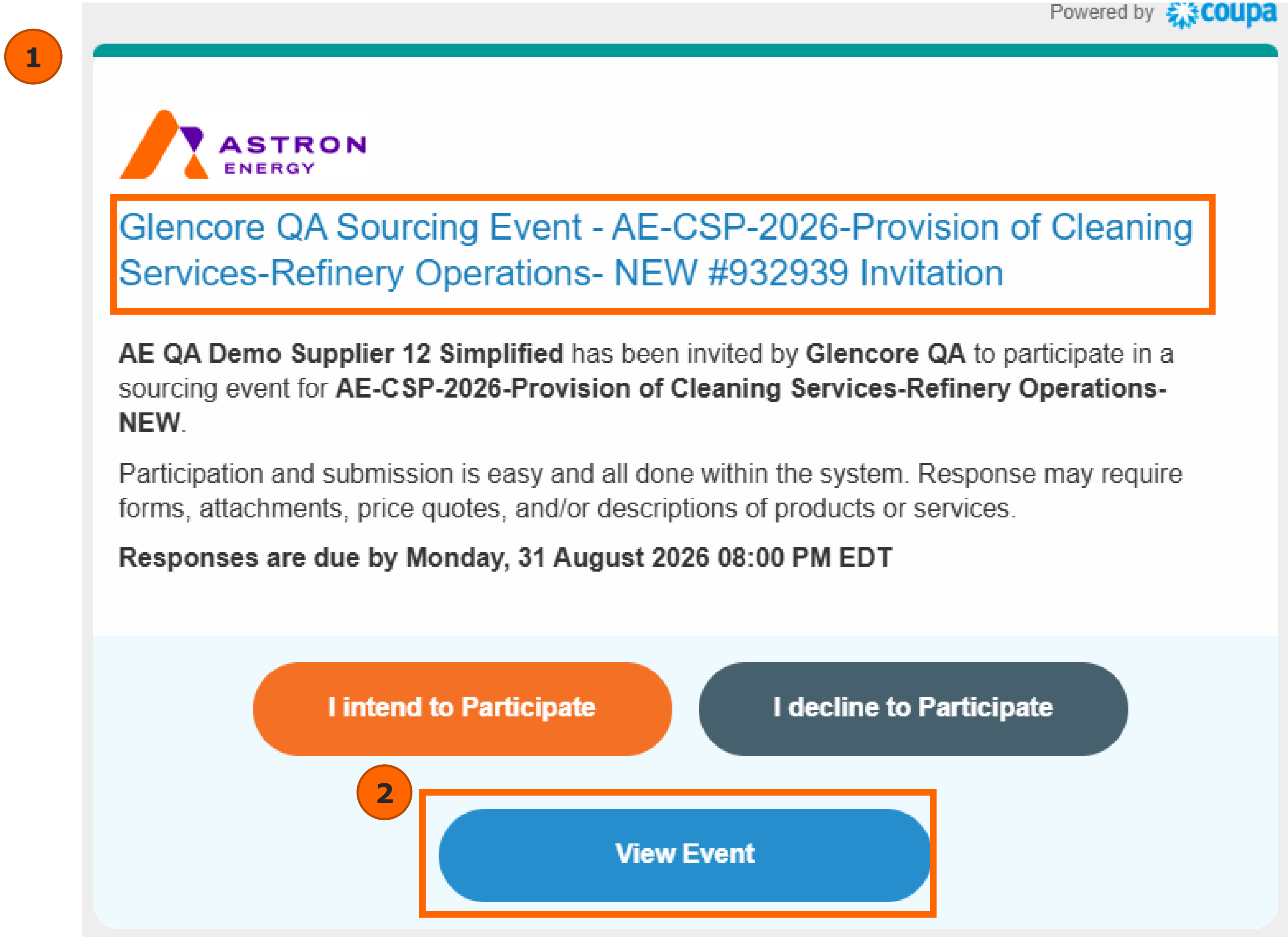
In this section, you will learn how you will receive an invitation to participate in a sourcing event

1. You will receive an invitation from Astron Energy to participate in an RFQ, RFI or RFP in your e-mail inbox.

2. Select the **View Event** to see details regarding this sourcing event.

   Select "**I intend to Participate**" if you do not yet wish to enter the event.

> ***NOTE:*** Sourcing Events are not accessible through the Coupa Supplier Portal but rather powered by Coupa by email.



13.2 Event information

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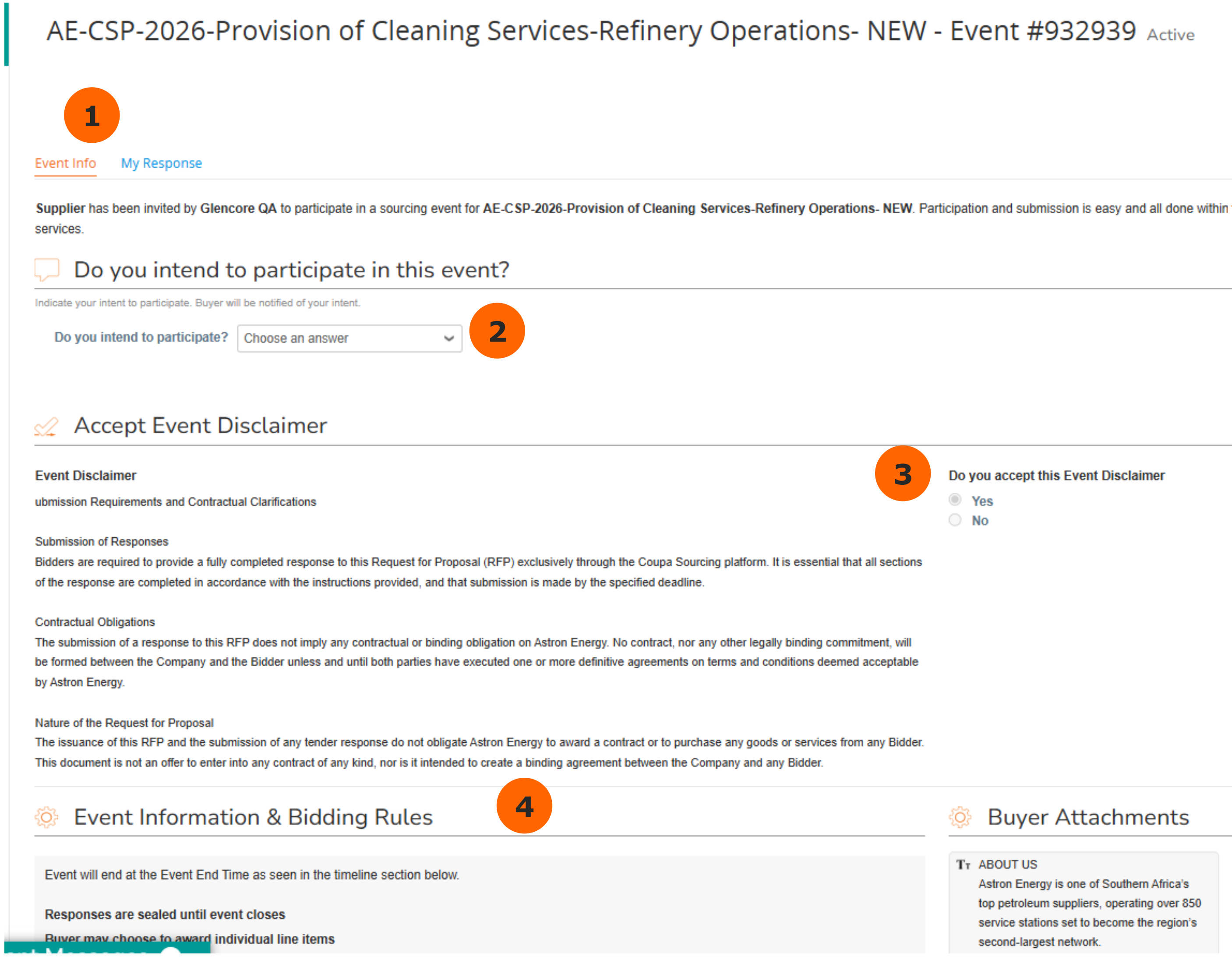
In this section we will learn how to participate in the event

1. In the **Event Info** area, you will find the required agreements needed to access the sourcing event

2. Select your intention to participate

3. Review the **Accept Event Disclaimer** and provide an answer to "Do you accept this Disclaimer". Finally select the **Send Response to Owner** button

4. Review the **Event Information & Bidding Rules** and the **Buyer Attachments** before entering your response.



13.2 Event information

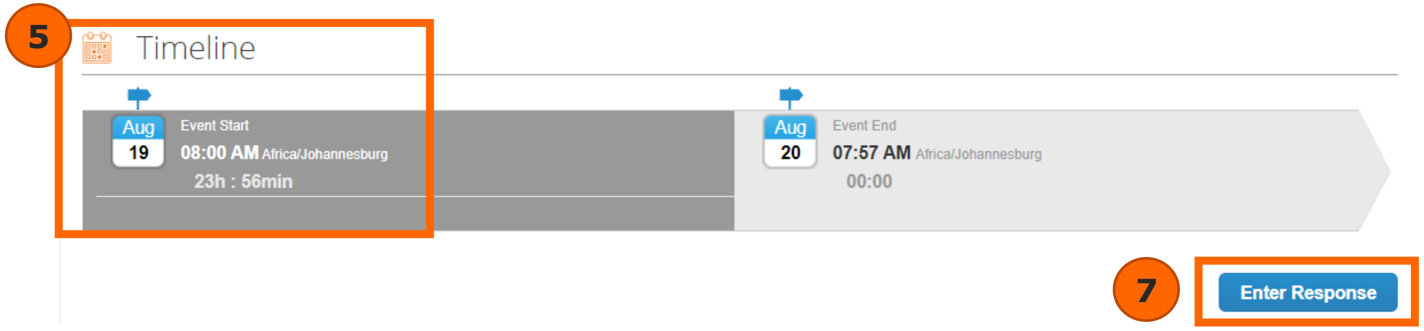
In this section we will learn how to participate in the event

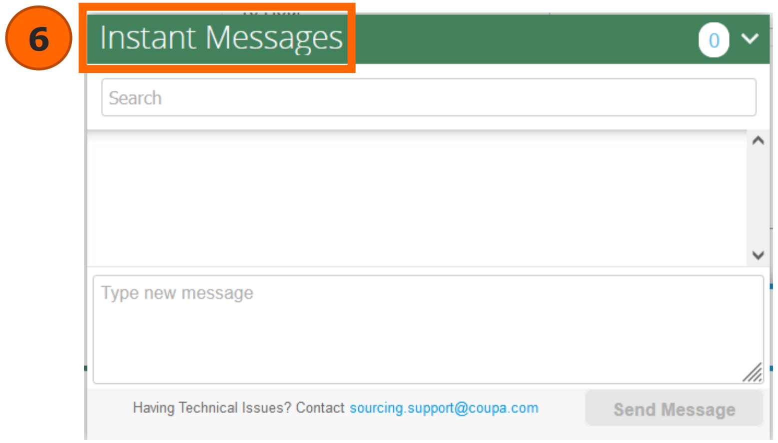
5 In the **Timeline** section provides a graphical view of when the event ends

6 The **Instant Messages** section is available to communicate with the owner of the event

7 To continue with the process and see the details of the event, select the option to **Enter Response.**

> ***NOTE:*** The message option will be enabled during the time the event is active.





13.3 Response to the event

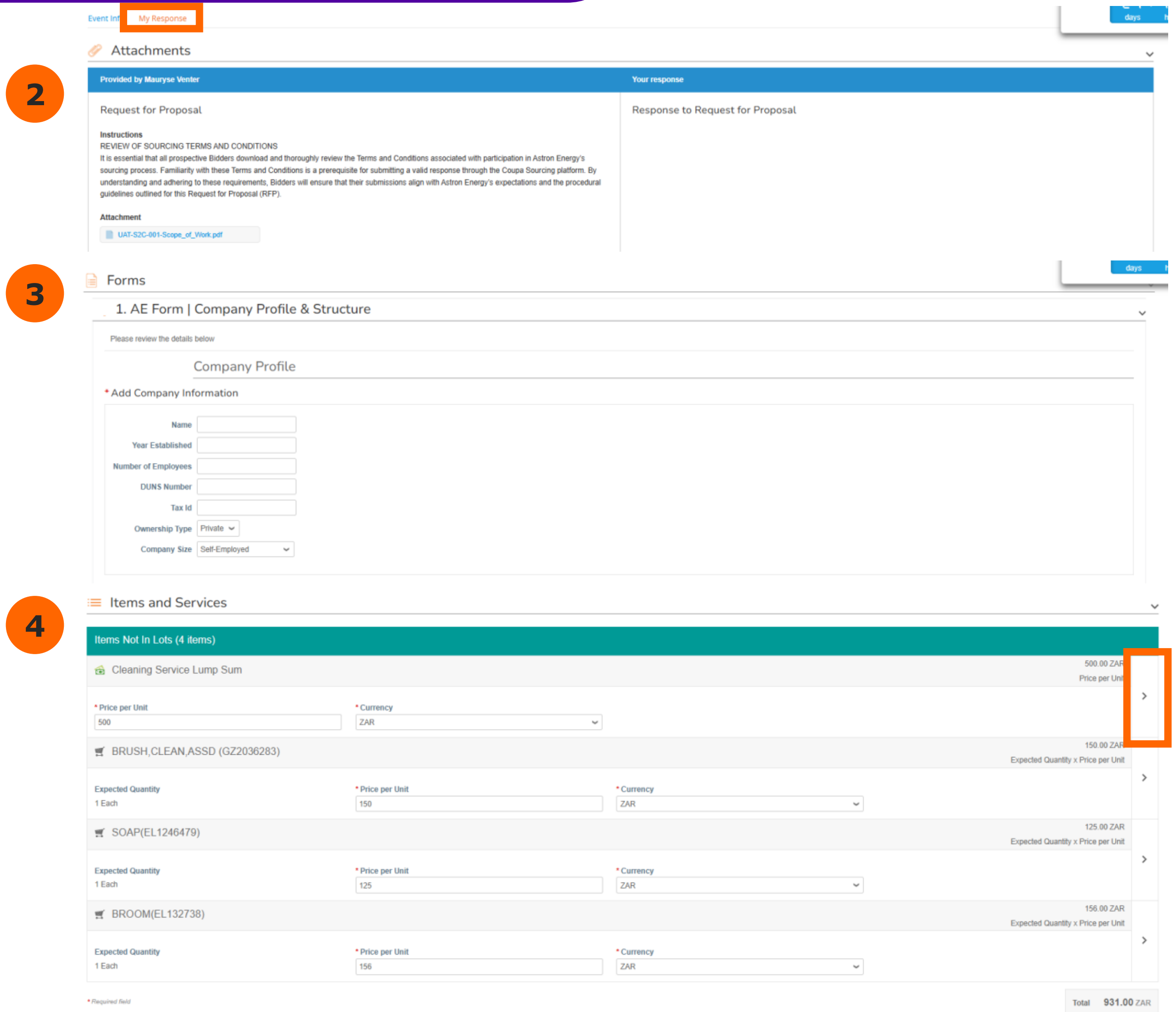
Entering the event, here you will find all the information related to the event and where you will have to provide your response

1. The **My Response** section is where you provide all the information, documents, and responses required for the sourcing event

2. In the **Attachments** section, you will find the files provided by Astron Energy that require your review and response. Review the instructions for each attachment and complete any required actions accordingly. Please note that some attachments are **mandatory** and must be completed before you can submit your response.

3. Complete the **Forms** section by providing all required information. Ensure that all mandatory fields are completed before submitting your response.

4. Enter your bid in the **Items and Services** section of the event. Click the **chevron** (>) next to an item or service to expand it and view additional details or provide additional information.



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13.3 Response to the event

Entering the event, here you will find all the information related to the event and where you will have to provide your response

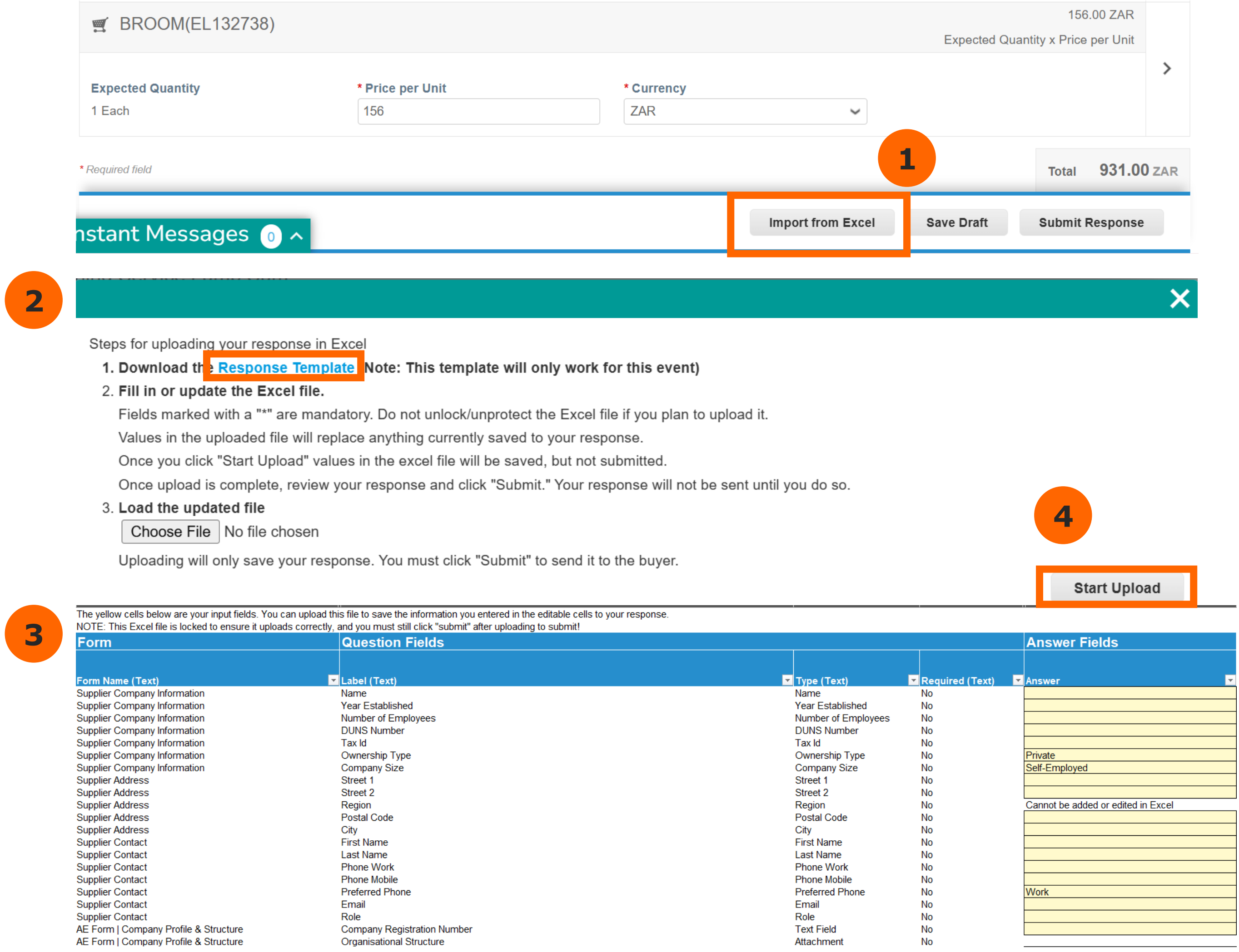
1. If preferred, you can complete the **Forms** and **Items and Services** sections using Microsoft Excel. Click **Import from Excel** to begin the process

2. Steps for **uploading your response in Excel** dialog box will open and guide you through the import process. Download the provided response template by following the on-screen instructions

3. Open the response template in Microsoft Excel and complete all required information

4. Save the completed template and return to the **Import from Excel** dialog box. Select the updated file in **Choose File**, then click **Start Upload** to import the information into the Forms and Items and Services sections of the sourcing event

Once the upload is complete, review the imported information to ensure it has been transferred correctly before submitting your response.



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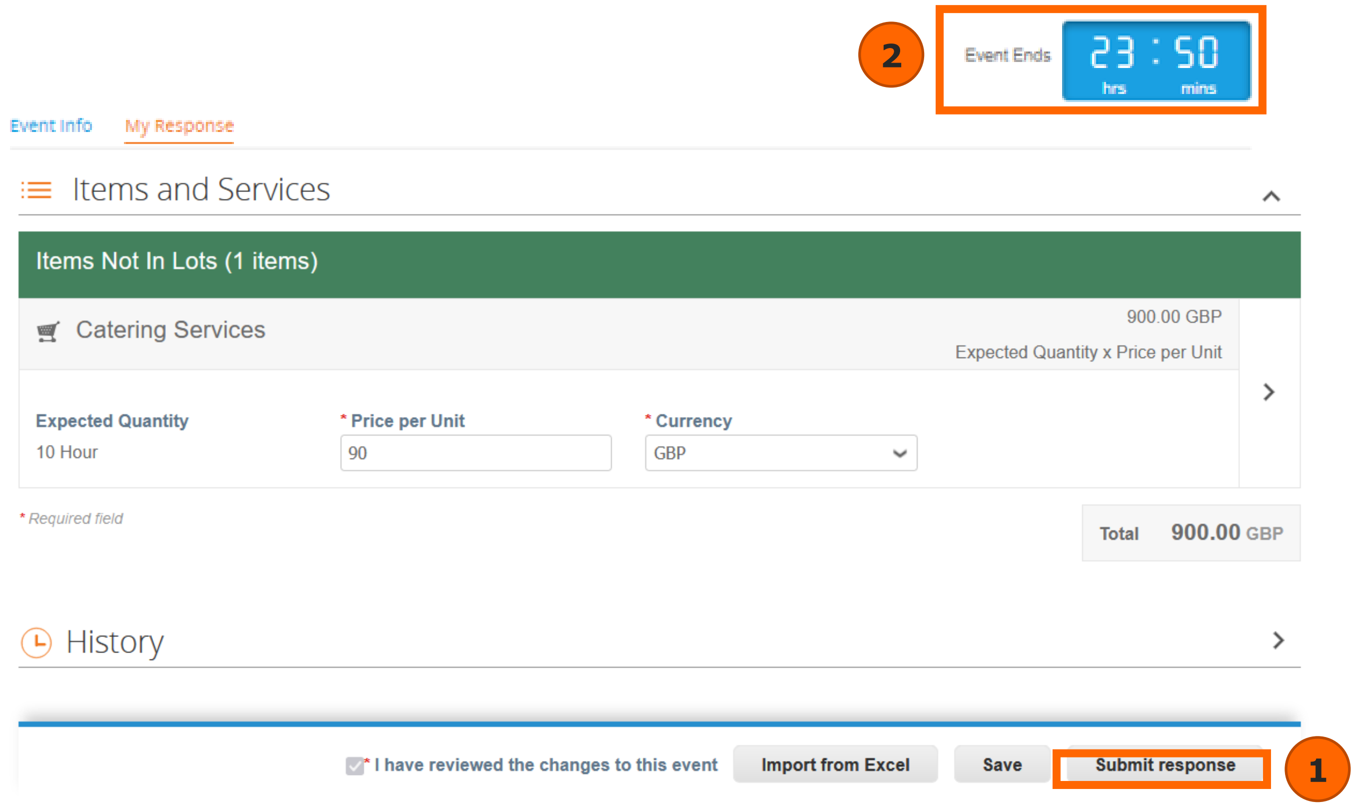
13.4 Submit response to event

This section will explain how to send your response and the different options you have

1. Once completed, click **Submit response** to Astron Energy

2. Once the time limit expires you will not be able to send any more responses.

Note: Astron Energy will not be able to view your response until the sourcing event has closed. You may update or revise your bid at any time before the event end date and time



Additional support

- Coupa Guides
- Glossary

14.1 Supplier portal guides

Information and resources dedicated to suppliers on success portal and available directly on CSP

Coupa Supplier Portal Information and Documentation

https://docs.coupa.com/en/supplier-documentation/coupa-for-suppliers

Purchase Orders

https://docs.coupa.com/en/supplier-documentation/coupa-for-suppliers/the-coupa-supplier-portal-or-csp/features-and-processes-in-the-coupa-supplier-portal/purchase-orders

Invoices

https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/invoices

14.2 Glossary

General glossary

- **CSP:** Coupa Supplier Portal means suppliers will be able to make inquiries and upload information related to their invoices. The CSP also allows monitoring the invoice payment status, including payment problems. In addition, all related notifications will be sent to the registered email account.
- **Change request**: Make change requests on a purchase order, it can be for example price or quantity.
- **Credit note**: Document through which you can cancel invoices previously made.
- **Invoice:** Through Coupa you will have the possibility to generate an invoice against a purchase order (PO) and be able to follow it up
- **Sourcing Event:** RFx Events consist of Request for Information, Request for Quotation, and Request for Proposal defined by one buyer and many sellers.

14.3 Glossary

Sourcing events glossary

RFX: RFI, RFQ or RFP

- **RFI:** Request for Information. Type of sourcing event used to collect qualitative information about suppliers or initiatives.
- **RFQ:** Request for quotation. Type of sourcing event that is used to obtain specific prices for products or services
- **RFP:** Proposal request. Type of sourcing event used when the product or service you obtain is complex in nature and requires a qualitative and quantitative assessment of the suppliers.
- **Lots:** Group of Items/Services That Need to Be Purchased Together from the Same Provider.
- **Items:** Lists of items to be procured. These can be set-up to be purchased together or from multiple suppliers if needed.
- **Questionnaire:** Form that the supplier must complete with the options indicated (checkbox, text, attachments, or radio buttons) for further evaluation in the event evaluation process.

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Questions?

Please send them to

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We are here to support you every step of the way

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