COUPA SUPPLIER PORTAL (CSP) - Guide

B BRENNTAG

TABLE OF CONTENT

WHAT IS COUPA SUPPLIER PORTAL (CSP)?

The Coupa Supplier Portal (CSP) is a platform for suppliers that makes working with Brenntag much easier and comfortable. Registration and usage are free of charge!

coupa supplier portal

http://supplier.coupahost.com

The CSP is a **free web-based tool** for suppliers to easily do business with Brenntag. The CSP makes managing **transactions** easy and consolidates all **relevant information** in one easy-to-use location!

Please keep in mind:
✓ Brenntag will not be using e-Invoicing, ASN (advanced shipping notice) or Add-ons in Coupa.
✓ Each Brenntag site for which you have an existing ERP ID will be a separate Customer, and therefore will be designated as individual customers, and as a result, separate profile.

With CSP, you can:

Receive and view POs from Brenntag

Create and maintain catalogs for Brenntag to order against in one single tool

Manage your company information

Create and manage service time sheets

CSP REGISTRATION
E-mail Invitation: Registration Instructions

In order to connect your company to Brenntag via the CSP, you will receive an email from Coupa Supplier Portal
(sender: <u>do_not_reply@supplier.coupahost.com</u>) inviting y   egister and join.

Notice the subject of the message!

This e-mail includes your legal consent when you accept the invitation.

1 Click on the **Join Coupa** button in the e-mail, which will direct you to the Coupa Supplier Portal registration page.

2 You can also forward the invitation (only to email addresses with the same domain) by clicking the

B BRENNTAG Brenntag Registration Instructions – Action Required

Powered by ○coupa

Hello Demo Supplier 10,

Welcome to the Brenntag Coupa Supplier Portal! Within the next 48 hours, click on the button below to register your account. If you are not the right person at your company, please send this request to the appropriate person by using the forward link.

On the Coupa Supplier Portal (CSP) you can manage the purchase orders placed by Brenntag with your company. You can use the CSP to:
- Configure your company's PO transmission preferences
- View all purchase orders
- Transact with your other customers

Note: Not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason at SupplierSupport@brenntag.com

With kind regards,
Brenntag Supplier Enablement Team

1 Join Coupa   **2** Forward this invitation

CLICK ON *JOIN COUPA*

💡 **Note:** If you do not receive any email from Coupa, also check your email spam or deleted items folder.
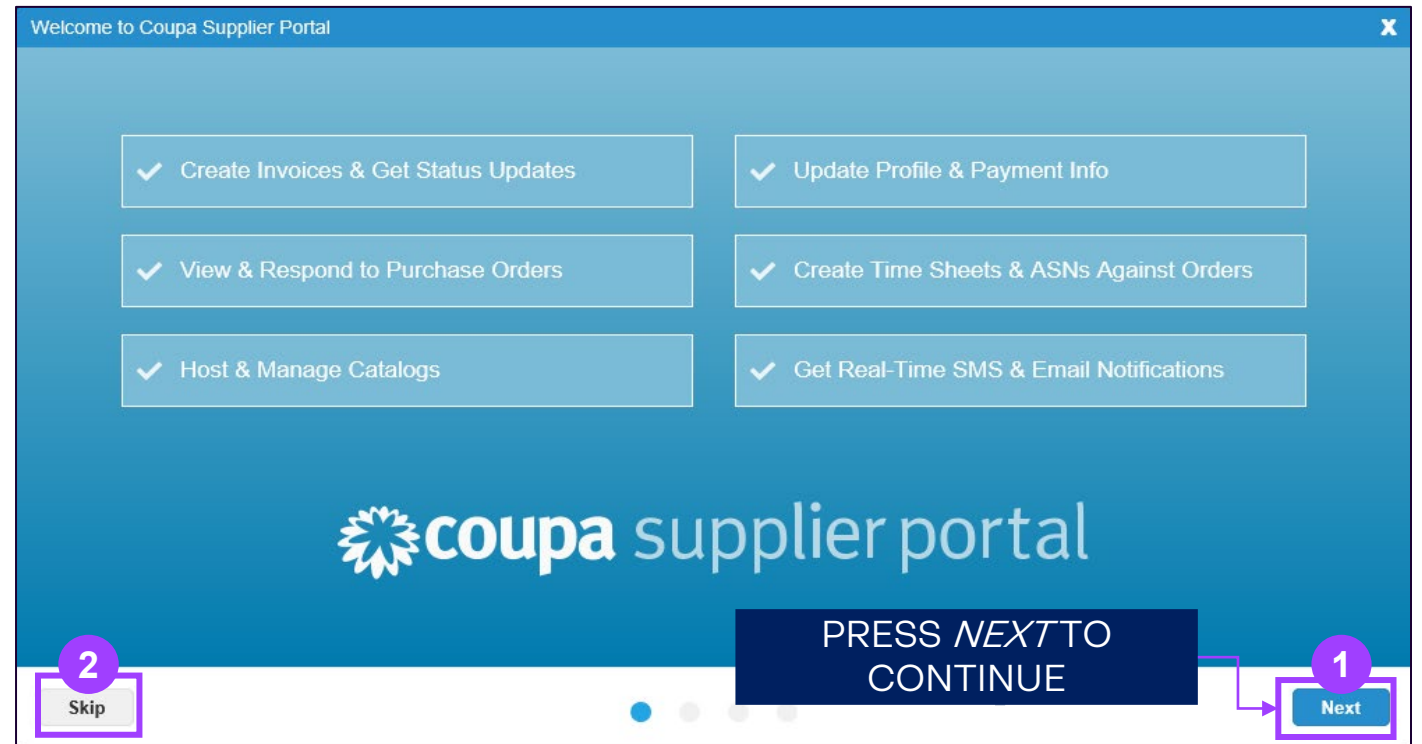
CSP REGISTRATION
Coupa Supplier Portal (CSP) Welcome Tour

Once you are signed in, Coupa offers you a welcome tour. We highly recommend that upon your first login you take the tour in order to gain valuable insight to the functionality of the CSP

If this is your first-time logging in, a pop-up window will appear with a few messages showing you all the features available with the CSP.

1 Clicking Next takes you to the succeeding pages of the tour. Once you're done on the tour, you will reach the CSP homepage.

2 You can also click the Skip button if you want to skip the tour or click X in the upper right corner to close the window.
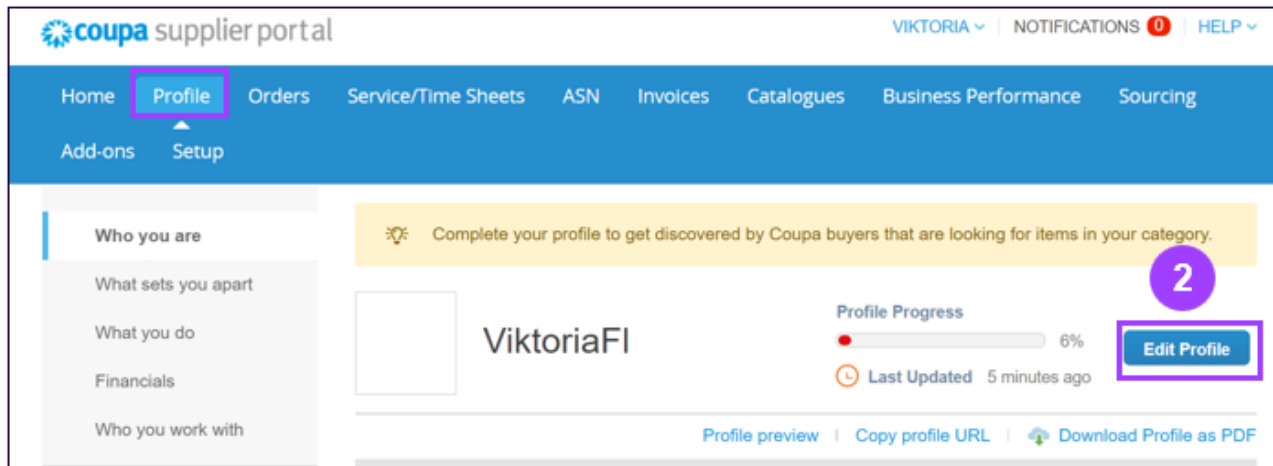
CSP REGISTRATION
Profile Completion
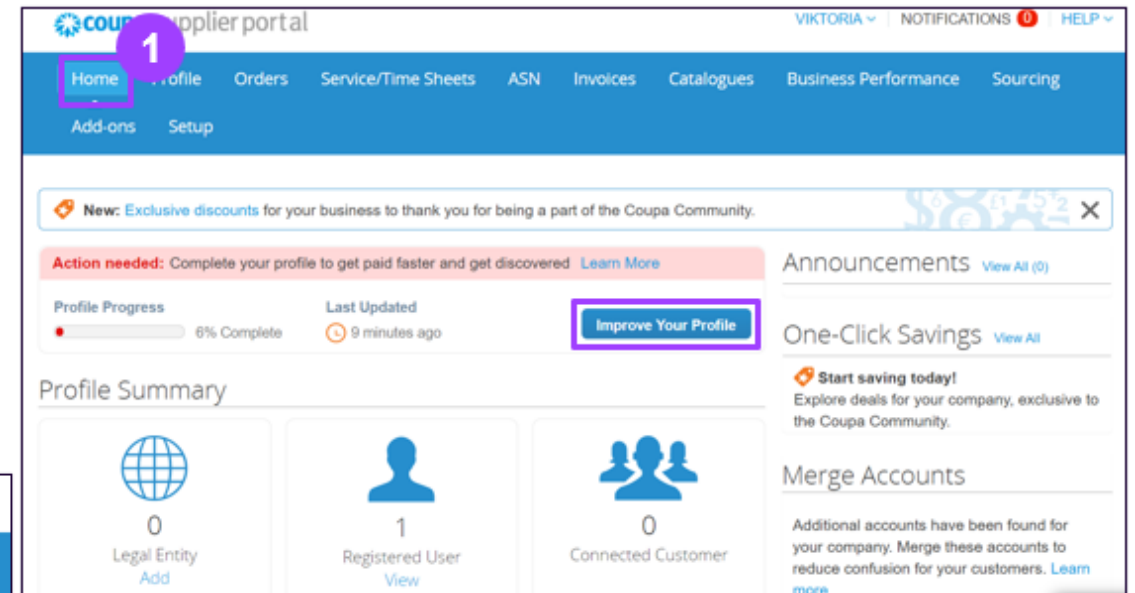
After signing up to the CSP, you will complete the onboarding process.

1 First, you will see the **homepage** with the menu tab, profile summary, actions needed.

2 To properly onboard as a supplier, you need to click on the **Profile** tab, then on **"Edit profile".**

This way, you can enter the basic information such as address, contact information, company related information e.g. shipping, bank information, price listings, discounts for customers...

CSP HOMEPAGE NAVIGATION
How to log in to CSP

1 Go to CSP link:

http://supplier.coupahost.com

2 Enter **Email Address**

3 Enter your **Password**.

4 Click Log in

Note: This is applicable only if you have already registered for the CSP.

coupa supplier portal

| Log in | Sign up |

Login to your Coupa account

Email Address

Enter email address **2**

Password

Enter password **3**

Forgot Password | Please fill out this field.

4 Log in

Enter your Email Address

Enter your Password

Click Log in

CSP HOMEPAGE NAVIGATION
Homepage overview

On the top right side of the page, next to your username, you will find the account settings, notifications and help buttons.

In this slide, we will explain their functions.
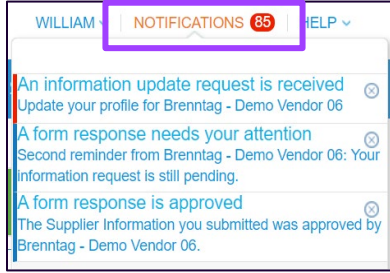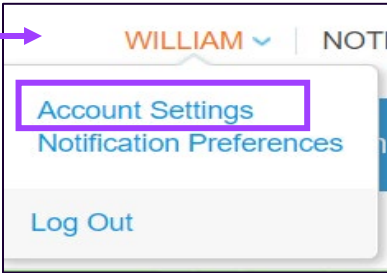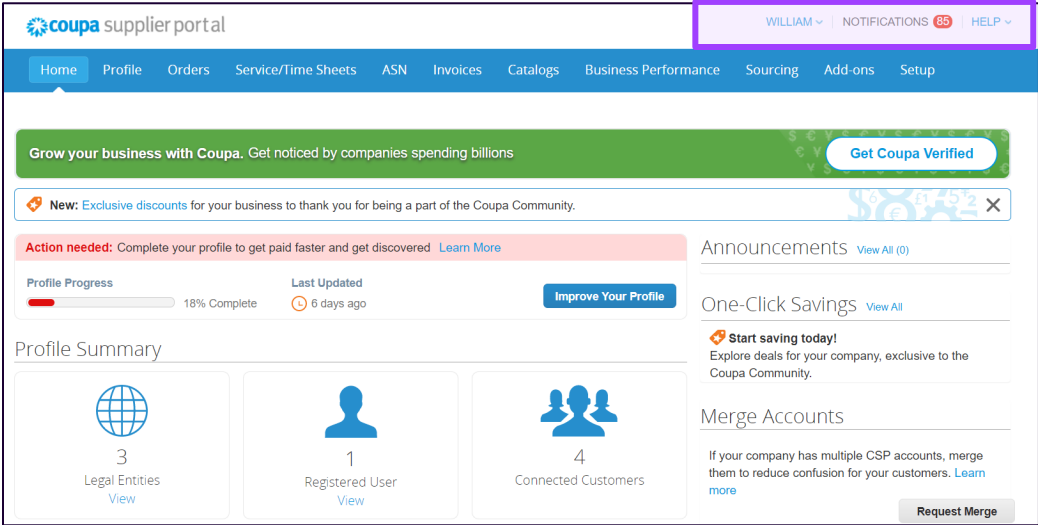
Account settings:

On the *"My account"* page you can make changes to your personal information (name, photo, Password)

You can also set your **Notification preferences**, (Online / E-mail / SMS) and enable/disable two-factor authentication

Notifications:

Hover your cursor over the Notifications tab to see your unread system notifications.

Help:

Click on the **"Help"** link on the top right corner of the page to access the Online Help, or to view the Blog & Help Tour anytime.
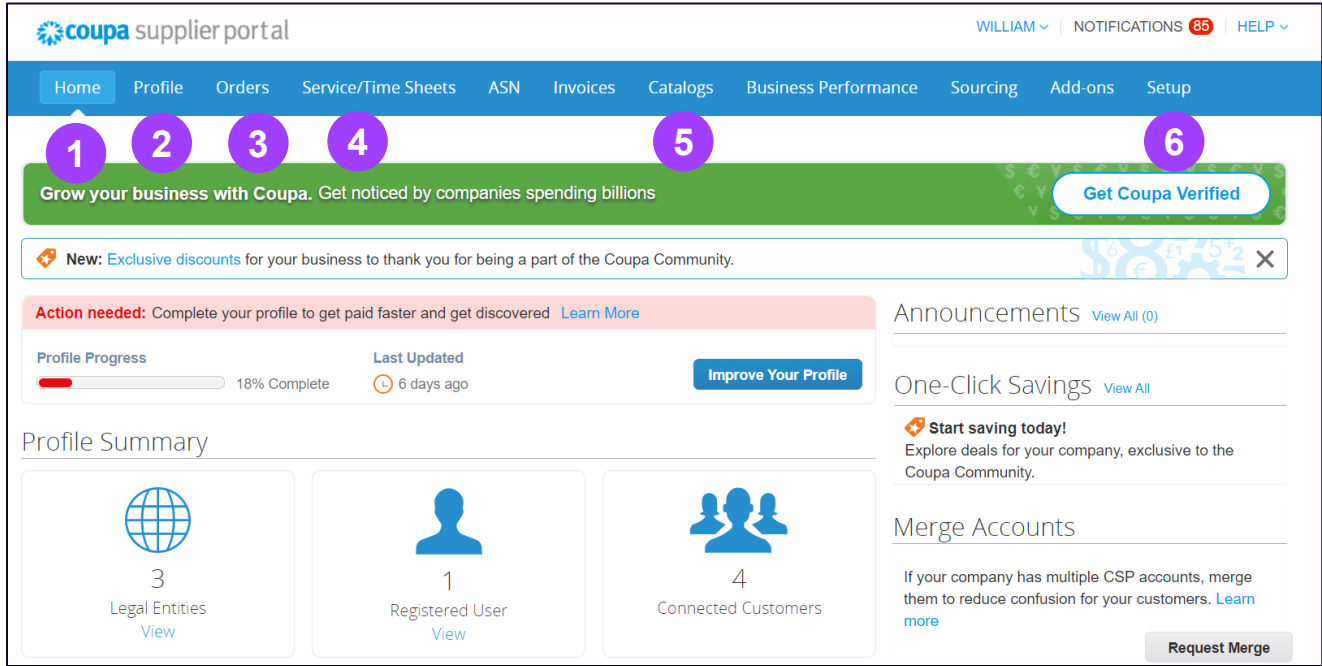
CSP HOMEPAGE NAVIGATION
Header Bar

1 **Home:** You can view and edit your company profile, access list of connected customers, and merge accounts.

2 **Profile –** This is where you create, modify, and manage your profiles, and manage which remit-to addresses which Brenntag can use.

3 **Orders**: This is where you can find the Purchase orders issued by Brenntag.

4 **Service / Time sheets:** List view of service-based time sheets, and related Purchase order lines

5 **Catalogs:** In this tab, you can create and manage Brenntag catalogs.

6 **Setup:** This is where you can manage users, merge requests, add legal entities, accept terms of use.

Please note that for Brenntag, only the tabs marked are relevant. **Brenntag will not use the CSP to process Invoices.**

CSP HOMEPAGE NAVIGATION
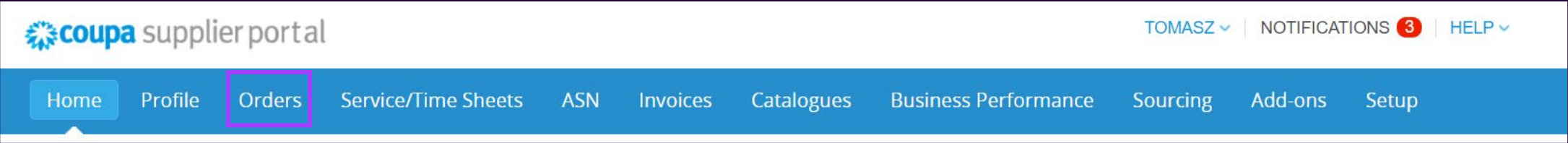## Orders Tab (1/9) – Introduction

To interact with Brenntag and receive Purchase Orders you will either use …

The **Coupa Supplier Portal (CSP)** a free of charge **online platform** coupa supplier portal

Supplier Actionable Notifications (SAN)* to act directly on e.g. new POs from **your E-Mail inbox**

*See Appendix for the details

Within the CSP you will always have an overview and be **able to receive your Purchase Orders** (POs) from Brenntag!

coupa supplier portal

TOMASZ ∨ | NOTIFICATIONS **3** | HELP ∨

Home | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogues | Business Performance | Sourcing | Add-ons | Setup

Note that depending on your notification settings, you will receive E-Mail and/or SMS notifications first, with the information about a new PO.
The PO will be added as an attachment to your E-Mail.

CSP HOMEPAGE NAVIGATION
Orders Tab (2/9) – Introduction

Click on the Orders tab from the main menu to see the full list of Purchase Orders issued to you from the selected customer. You will be able to find your purchase orders from Brenntag and their status. For a detailed look at a specific PO, click the PO number you wish to review

1 If Brenntag is not displayed right away, you can use the Select Customer menu (should there be more than one customer of yours using the CSP).

2 You will see a list of all orders with their PO numbers, items selected, their status & total amount.

3 Acknowledged at: refers to the date when you acknowledge the receipt of a PO. Can be seen as "none" if it has not been done yet.

Brenntag might also create announcements specific to the order page

Let customers know how you can receive POs by clicking here and filling out the required fields

CSP HOMEPAGE NAVIGATION
Orders Tab (3/9) – Create custom views for your POs

The View option helps manage filtering among POs, which is useful in case the table is quite populated.

1 If you want something more customized, you can select "**create view**" from the dropdown in order to create your own table.

2 You are being taken to a new table to create your view. Give it a **name** and select the columns you want to be displayed in the area **Columns**. If you only want to display specific POs, you can also apply some filters in the area **Conditions**.
Click "**save**" once the assembly of your view is finished.

CSP HOMEPAGE NAVIGATION
Orders Tab (4/9) – Header Details

After clicking on **the PO number** on the list, the system will display all the **PO Details** to the specific order.

1 PO Number

2 Status of the PO

3 Order Date

4 Revision Date (if applicable)

5 Requester's name

6 Requester's e-mail

7 Payment Terms

8 Attachments

9 After the PO is reviewed, ensure to acknowledge the PO by ticking the box.You can also uncheck this box again.

CSP HOMEPAGE NAVIGATION
Orders Tab (5/9) – Line-Item Details

After clicking on **the PO number** on the list**,** the system will display all the **PO Details** to the specific order.

10 Review product description, quantity, unit of measure (UoM), price and total amount

11 Review required Need By date

12 Review total values for the entire PO

13 Action buttons, you may save the PO or print the view of the same

14 Comments can be made to raise any concerns, or in general for clarity purposes.

Orders Tab (6/9) - Create Shipment Tracking (optional)

1 In the **Shipment Tracking** section in the PO, Click on the **Add** (➕) icon.

2 In the appearing **Create Shipment Tracker** popup window, enter the tracking number for the entire PO.

3 Select a carrier (FedEx, USPS, UPS) from the drop-down window,

4 And add a note (optional), and Save

Note: You can add shipment tracking information to POs if real-time shipment tracking needed.
You can enter only one tracking number on a PO.

📦 Shipment Tracking   **1** ➕ Add

No shipment tracking.

Create Shipment Tracker ✕

Enter tracking number for entire PO. To ship PO partially, create ASN.

* Number [   ] **2**

* Carrier [⌄] **3**

Note [   ]

Cancel   Save   **4**

CSP HOMEPAGE NAVIGATION
Orders Tab (7/9) – PO Changes

You can request changes to POs created in Coupa, and then submit them for Brenntag´s approval.

1 Click on the **number of the PO** you wish to modify.

2 Scroll down and click on "**Request change**" (If you previously saved but not submitted your change request, click on "edit change").

Request Change

3 The editable fields are **Quantity** and **Need by Date**.

4 Select a **Reason for change** from the drop-down list

5 After changing the needed fields, you can decide to Save, or **Submit** the change request. Wait until the request is processed by Brenntag. You can always withdraw it in the meantime.

CSP HOMEPAGE NAVIGATION
Orders Tab (8/9) – PO Changes

Changes are effective when a change request is approved. When a PO change request is rejected, you receive the "**Order change request is rejected**" notification. For more information, see <u>View and Manage Notifications</u>.

CSP HOMEPAGE NAVIGATION
Orders Tab (9/9) – PO Changes

On the **Order Changes** and **Order Line Changes** tabs, you can see tables listing all your PO and PO line changes.

You can filter both tables by columns, use the search bar to filter with a search term(next to "advanced"), or click on the **View** drop-down list to perform advanced filtering.

1 The **Purchase Order Changes** table has the **Change orders initiated by suppliers** and **Pending approval order changes** built-in filters

2 The **Purchase Order Line Changes** table has the **Pending approval order line changes** built-in filter.

CSP HOMEPAGE NAVIGATION
Service/Time Sheets Tab (1/4) – Introduction

Service-based Time sheets and the related Purchase Order lines can be found under the Service/Time Sheets tab.

Service/Time Sheets Tab (2/4) - How to create and submit

To create a time sheet, click on the ⛑ icon as shown on the right side; or click on a PO and click the button.

Create Service/Time Sheets

1 **Enter the hours per day** against the PO line item. You can enter only one week at a time.

2 You can **save as draft or submit** the time sheet to your customer.

3 You can also **add a comment** for your customer.

Purchase Orders

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Export to ⌄ | View: All | Search 🔍

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned T	Actions
4100000334	09/16/22	Issued	None	25 Hours of German Translator	No	2,500.00 EUR		⛑
4100000331	09/14/22	Issued	None	4 Box of 12.9" Ipad Pro	No	4,976.00 EUR		

Service/Time Sheets #55

PO 4100000289

⏱ Time Sheet   ◀ August 07, 2022 - August 13, 2022 ▶

		Sun 7	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	* Total
PO Line #	Item								
1	German Translator Submitted: 0.0 Hours	0.0	6	6	8	6	9	5	40.00

1

Attachments
Add File | URL | Text

Total Hours: 40.00

2 Canc | Save as Draft | Submit

💬 0 Comments   Mute Comments ⌄

3 Enter Comment

Send Comment notification to a user by typing @name (ex. @JohnSmith)
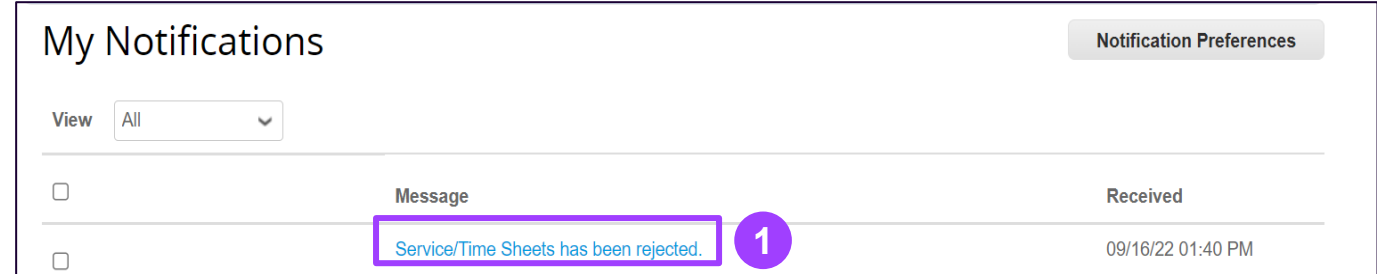
Attachments Add File | URL
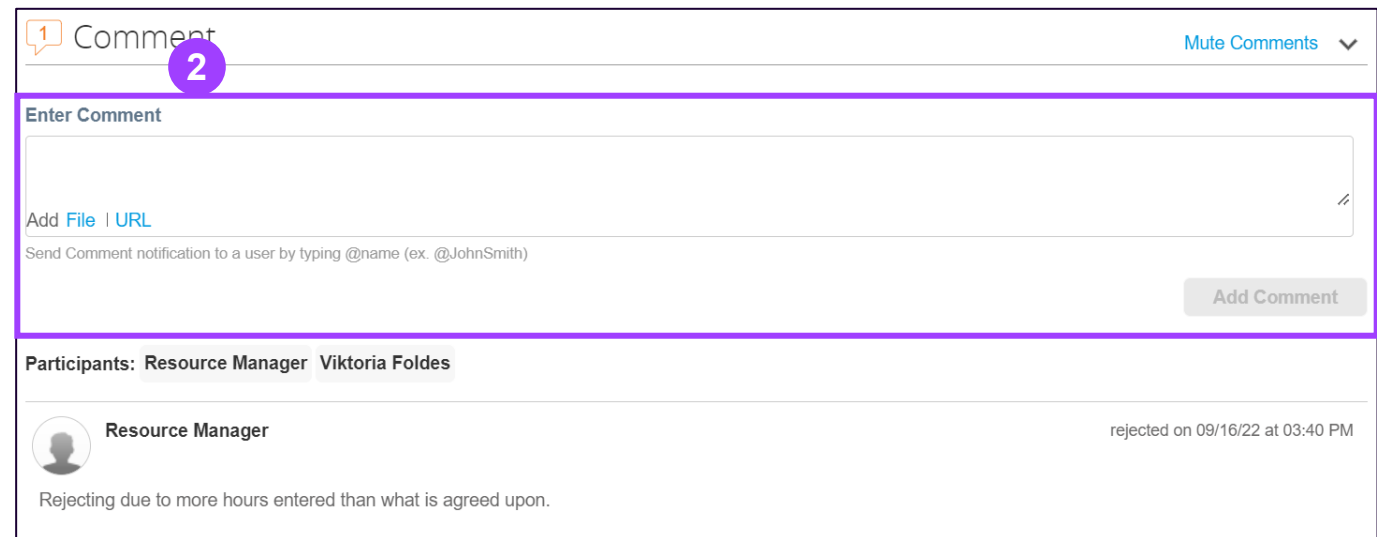
20

CSP HOMEPAGE NAVIGATION
Service/Time Sheets Tab (3/4) – Rejected time sheets

If more hours than agreed are entered, the Brenntag resource manager will not be able to approve the timesheet, and **the order will not be completed**.

1 You will receive a **Notification** about the rejected timesheet.

2 Resource Managers can **include comments** for their reason for rejection.

3 In this case, **you will have to create a time sheet again.**

My Notifications

Notification Preferences

View | All

	Message	Received
☐	Service/Time Sheets has been rejected. **1**	09/16/22 01:40 PM

💬 Comment

2

Mute Comments ⌄

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

Participants: Resource Manager Viktoria Foldes

Resource Manager   rejected on 09/16/22 at 03:40 PM

Rejecting due to more hours entered than what is agreed upon.

CSP HOMEPAGE NAVIGATION
Service/Time Sheets Tab (4/4) – Advanced View

The "advanced" option provides a more punctual way for you to filter time sheets easily. You can filter and customize your view to:

- Match conditions

- Filter by,

- Filter clause and text,

- Or even adjust the view depending on their status

Supplier Actionable Notification (SAN)

WHAT IS SAN?

SAN stands for **S**upplier **A**ctionable **N**otification

SAN will allow you to act on items processed by Brenntag out of Coupa directly. There is no need to register to an additional portal or remember any new passwords.

The idea is that you can control everything via your E-Mail inbox by Action Buttons.

The service is free – you can register for the CSP at any point later if you wish to no longer use SAN.

With SAN you can:

📧 **Receive POs**

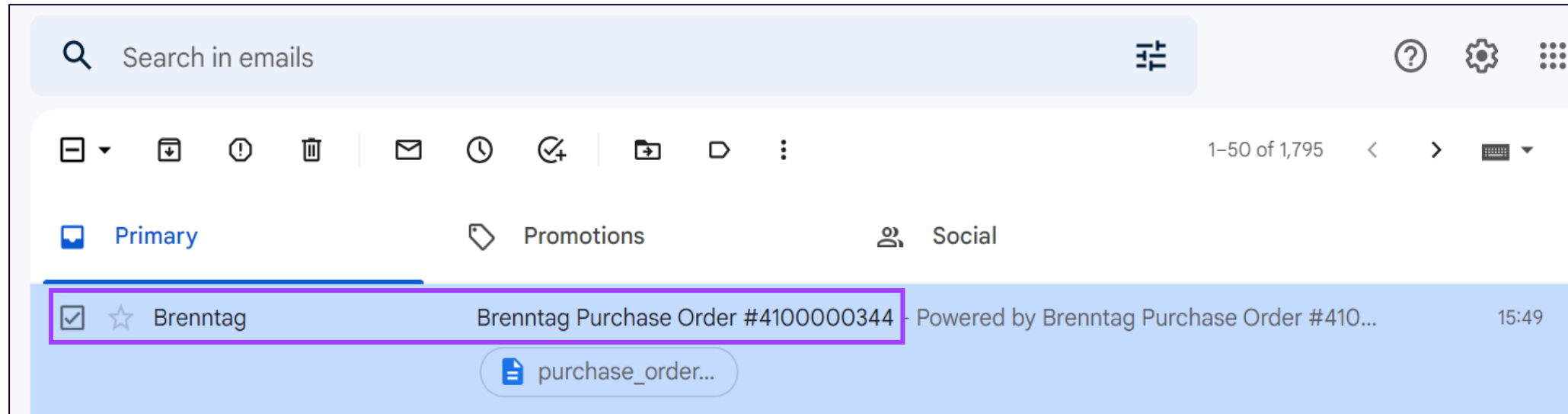📄 **Act on received POs**

✏️ **Fill in onboarding forms***

*Covered in Coupa Supplier Information Management (SIM) job aid

SAN Overview
Receiving POs

POs will arrive directly via E-mail to your Mailbox.

25

SAN Overview
Receiving POs

Once you open the E-mail, a brief overview of the PO will become available to read

A **Issuing Site** and **PO-number**

B **Actionable buttons**

C **"Create your account"** button

Only relevant if you want to create an account in the

Coupa Supplier Portal (CSP) but not required for

processing POs via SAN

26

SAN Overview
Receiving POs – PO Header and Information

The PO header contains

A Supplier name, address

B PO-number, buyer contact information

C Delivery information

D Terms and Conditions

E Line Items information

F Payment Terms & Shipping terms (if specified)

SAN Overview
Actionable Buttons

Manage Order

Orders details below

Acknowledge PO | Add Shipment Tracking | **Not Relevant for Brenntag** Accelerate Payment | Add Comment
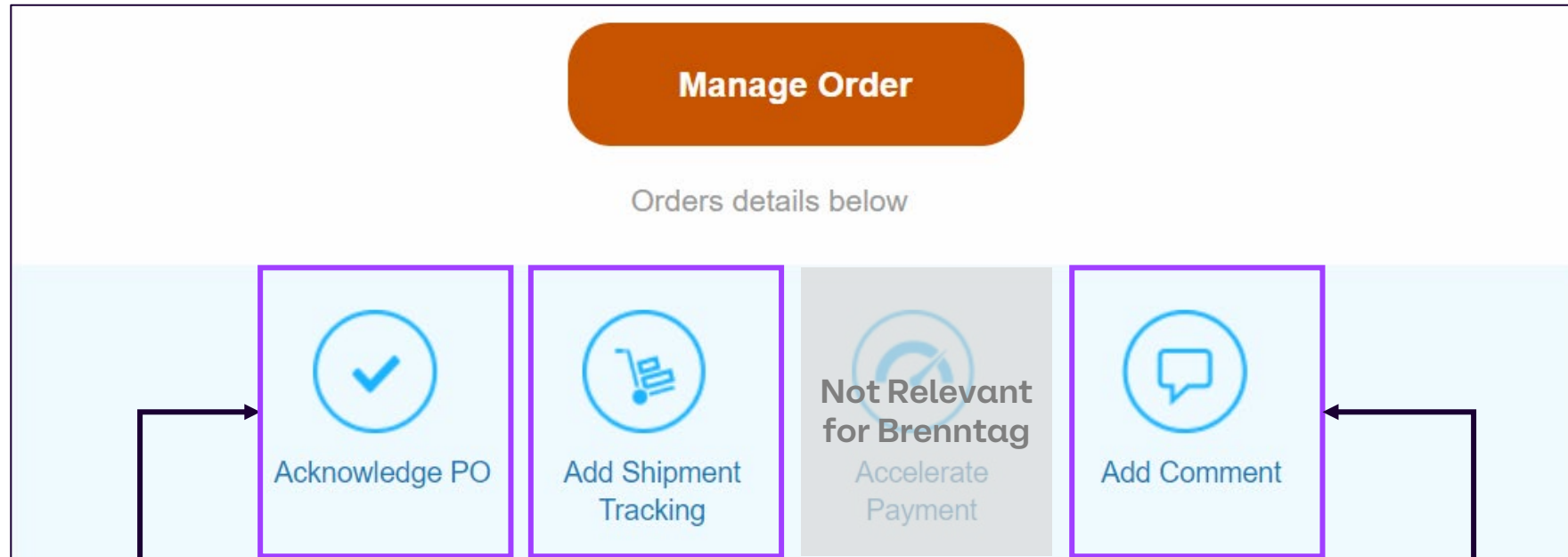
Acknowledge PO allows you to directly acknowledge the PO and send this information to Brenntag.

Add shipment tracking information can be used to enter detailed information about a delivery you sent.

Add Comment to the specific PO. You are being redirected to the PO-page, where you can enter the comment.

28

SAN
Actionable Button – Acknowledge PO

1 Amongst the actionable buttons, click on "Acknowledge PO" button from the PO E-Mail you received.

2 Then, you can tick the Acknowledged Box, so the Buyer will be able to see the date the PO was acknowledged.

If it has been acknowledged and for any reason you would like to un-acknowledge the PO, simply click on the box again so that it will be removed.

Note: If you un-acknowledge the PO, please also reach out and inform the Brenntag contact.

1

Acknowledge PO

Purchase Order #4100000344

General Info

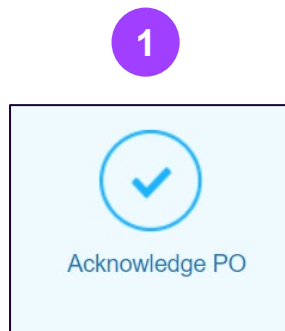|	
Status	Issued - Sent via Email
Order Date	10/04/22
Revision Date	10/04/22
Requester	Viktoria Foldes
Email	viktoria.foldes@accenture.com
Payment Term	None
Attachments	None
Acknowledged	☑ **2**

Shipping

Ship-To Address   Schellerdamm 16
Stückgut: MO – DO 07:00 – 13:00, FR 07:00 – 12:00
21079 Hamburg
Germany
Attn: Viktoria Foldes

Terms   None

Shipment Tracking   ⊕ Add

No shipment tracking.

Lines

Advanced | Search 🔍 | Sort by | Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
	🛒	A4 Notebook	1	Centimeter	20.00	20.00	0.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number
10/10/22	None	None	None

Per page 15 | 45 | 90

Total EUR **20.00**

Save | 🖨 Print View

SAN
Actionable Button – Create Shipment Information

1 Amongst the actionable buttons, **click on "Add shipment tracking"** button from the PO E-Mail you received.

2 In the appearing **Create a send tracker** popup window, enter the tracking number for the entire PO

3 Select a carrier (FedEx, USPS, UPS) from the drop-down window

4 And add a Remark (optional), and **Record**

Note: You can add shipment tracking information to POs if real-time shipment tracking needed.
You can enter only one tracking number on a PO.

1

Add Shipment Tracking

Create a send tracker ✕

Enter the tracking number for the entire BOC. For partial delivery of the BoC, create an ASN.

* Tracking number [   ] **2**

* Carrier [▾] **3**

Remark [   ]

Cancel Record **4**

SAN
Actionable Button – Add Comment

1 Amongst the actionable buttons, click on the "Add Comment" button from the PO E-Mail you received.

2 Then, you can leave comments that will be visible for Brenntag. Both ends will be notified when a new comment is added, or if a response to one was created.

The "Comments" box should be used for ALL communication between you as a supplier and Brenntag, related to a specific PO.

3 Lastly, click on "Add comment".
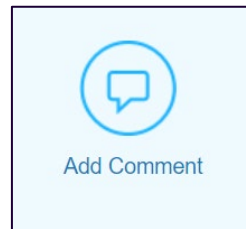
1

Add Comment

1	Type	Item		Qty	Unit	Price	Total		Invoiced
	🛒	A4 Notebook		1	Centimet er	20.00	20.00		0.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number
10/10/22	None	None	None

Per page 15 | 45 | 90

Total EUR 20.00

Save   🖨 Print View

0️⃣ Comments   Mute Comments ⌄

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

2

3 Add Comment

CLICK "ADD COMMENT" BUTTON

31

Thank You!