



THE SHELBY GROUP

Coupa Supplier Portal:

Quick Reference Guide – For Suppliers

WEHR

Minerals



PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

Overview

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- Navigation
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 - Login to the CSP
 - Welcome Tour
 - Getting Help
 - Manage Your Account
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Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Weir Minerals using Coupa.
- Signing up to the CSP is **critical** to gain access to purchase orders and process invoices
 - An email will be sent that will have directions on how to register to the CSP
- Suppliers will have the ability to manage various content and settings for your Weir Minerals profile.
- Some of the content and information that is available to manage is:
 - Manage Company Information
 - View purchase orders
- The easiest way to get set up to use the CSP is to ask Weir Minerals for an invitation.
- Once you accept the invitation and register, you'll be automatically connected to Weir Minerals .

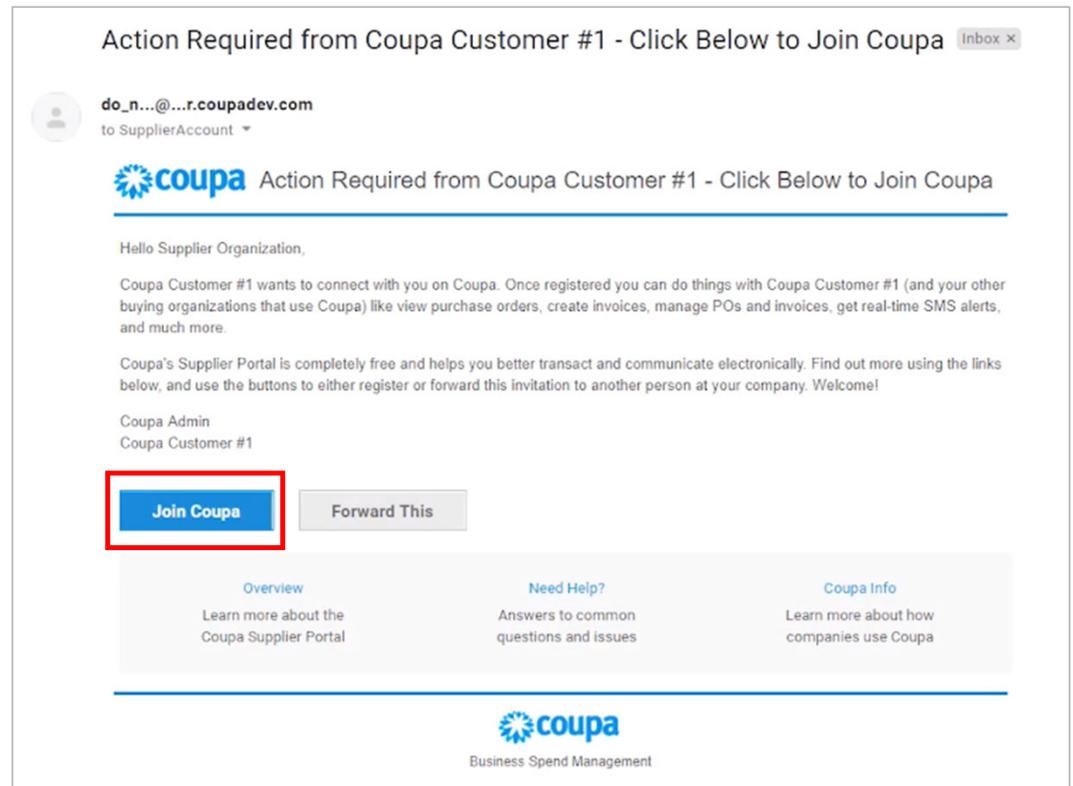
Coupa Supplier Portal (CSP)

- Ensure that your company's IT security policy permits emails in HTML format. Please be informed that all emails eg. Purchase Orders from Coupa will be in HTML format.
- If your company's IT security policy blocks HTML emails, you would not be able to receive any email notifications from Coupa for new Purchase Orders nor revisions in Purchase Orders.
- Ensure that your company's IT security policy permits these following domains (request your IT firewall team to whitelist these domains):
 - <https://supplier.coupahost.com/> -> For access to the Coupa Supplier Portal
 - *@weirminerals.coupahost.com -> For emails from Coupa. Typically emails from Coupa will be sent from do_not_reply@weirminerals.coupahost.com

Customer Invitation

Invitation from Weir Minerals

- You will receive an e-mail from our Coupa system with a unique link to join the Coupa Supplier Portal.
- Once you click on the **Join Coupa** button, you will be directed to the CSP to register your account.
- Save <https://supplier.coupahost.com/> as a favorites link for quick access when you need to return to the site.



Create Your Account

- After following the link from the invitation email, fill in the mandatory fields to provide basic information for your account and your companies public profile.
- To create a CSP account, you must also accept the Privacy Policy and terms of use.
- By default, this account is the admin account for your Company. Once set up, you can add users and assign them roles, including account administration.
- You can invite others any time by entering their email address in the Forward email field in the Forward your invitation section and clicking Submit.

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* Email

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Forward your invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).

Forward email

Login to the CSP

Self-created invitation

- Register to join the CSP at: <https://supplier.coupahost.com>
- Once registered, let Weir Minerals know you're on the CSP, and give them the email address you used to register. Weir Minerals needs it to get you set up within Coupa.
- If you're already on the CSP with another Coupa customer, just give your CSP email address to the Weir Minerals Supplier Enablement team and they'll do the rest.

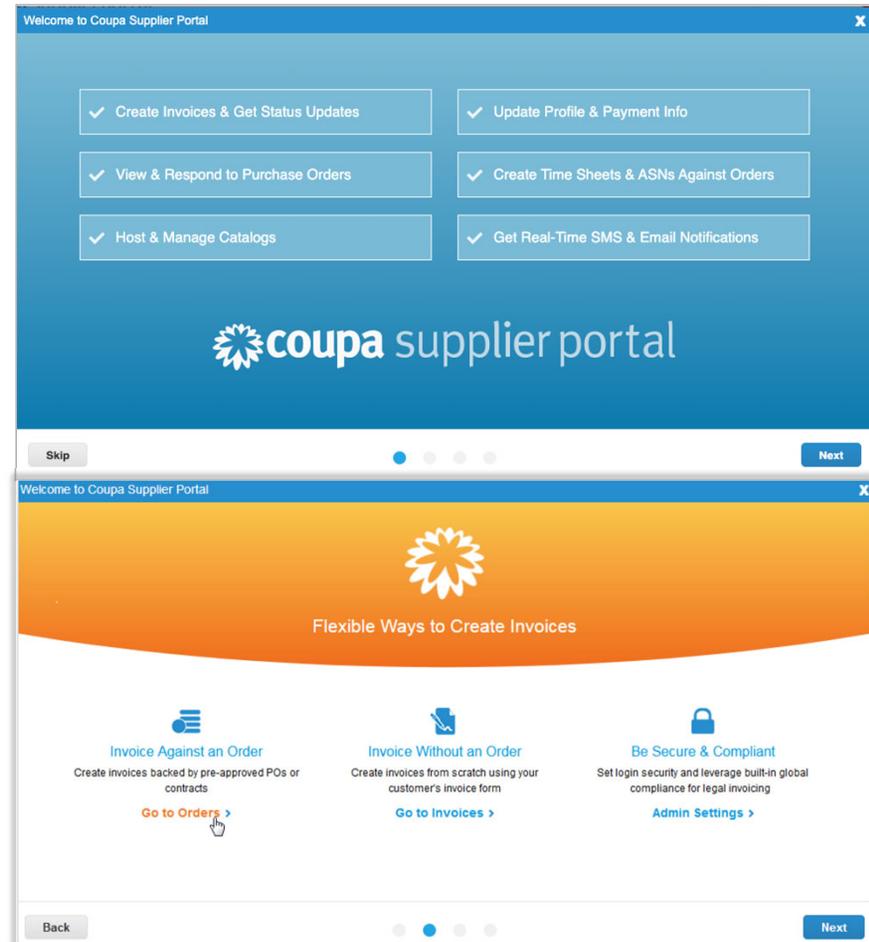
Customer-created invitation

- If you have received the customer created invitation and have registered, you will go directly to the Log In to access the Coupa supplier Portal.
- In both cases, you receive an email invitation with different subject lines, depending on whether the invitation was sent by your customer or initiated by you. Save <https://supplier.coupahost.com> as a favorite link.

The image shows two side-by-side screenshots of the Coupa web interface. The left screenshot is titled 'Register' and contains the text 'New to Coupa? Create your account or click here for help.' Below this are four input fields: 'First Name', 'Last Name', 'Company', and 'Email' (with a red asterisk). A blue 'Register' button is at the bottom. The right screenshot is titled 'Log In' and contains the text 'Welcome back! Login or click here for help.' Below this are two input fields: 'Email Address' and 'Password' (with a red asterisk). These two fields are enclosed in a red rectangular box. A blue 'Log In' button is below the fields, and a blue link 'Forgot Your Password?' is at the bottom.

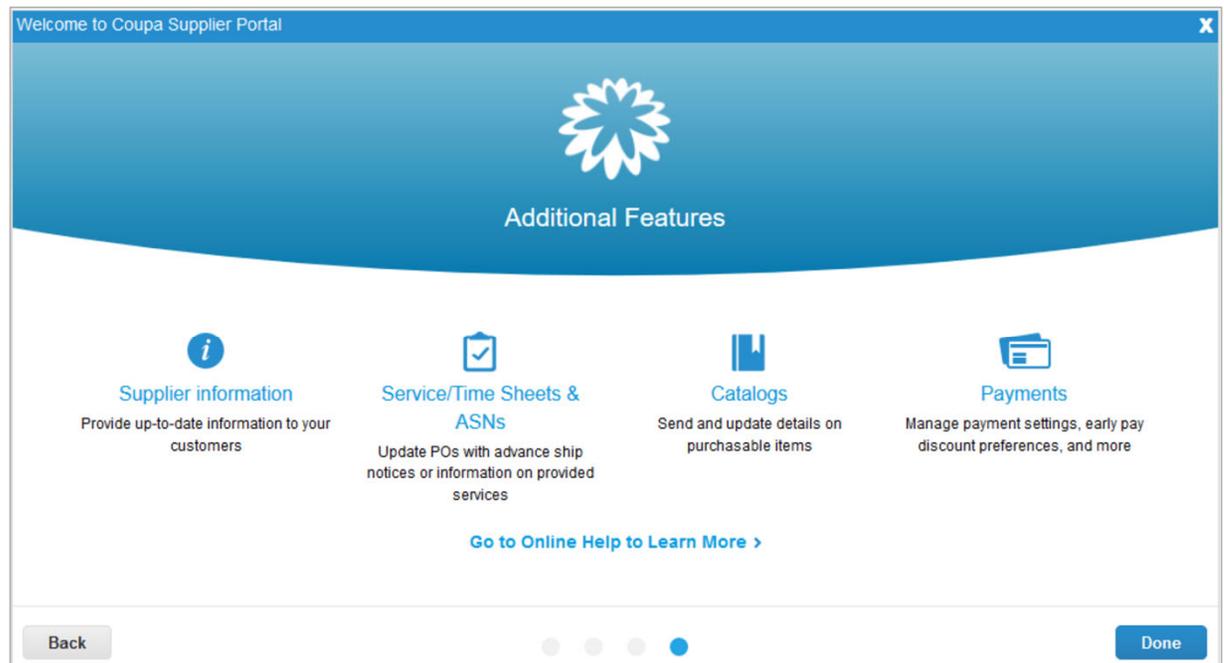
Welcome Tour

- Once you are signed in, Coupa takes you on a welcome tour.
- You can skip the tour by clicking on the Skip button or closing the window with the X in the top right corner.
- Clicking Next takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



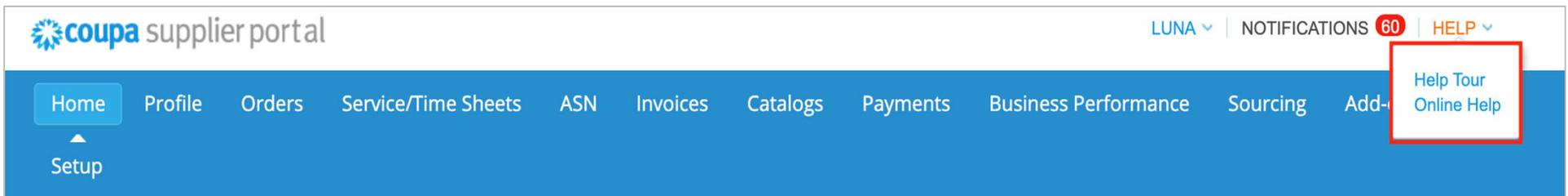
Welcome Tour Cont.

- The last page of the tour summarizes the additional features.



Getting help

- If you skipped the Welcome Tour you can access any time by clicking on Help Tour.
- For additional help, if you click on the Online Help link, you will be directed to the Coupa Support. They will be able to assist you with any *technical* issues. For any process concerns, please follow up with your Weir Minerals contact.

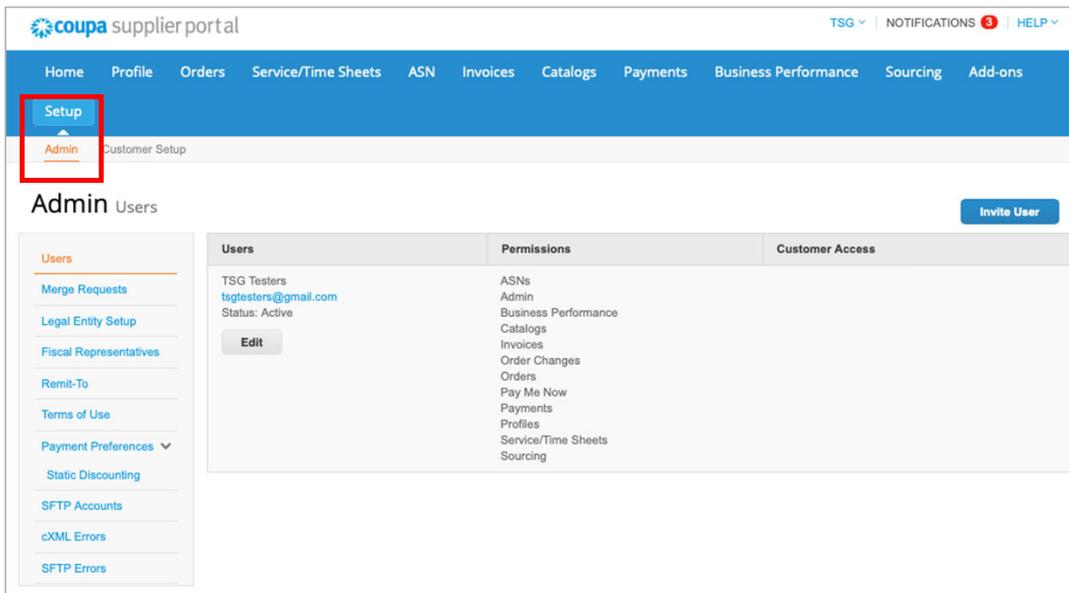


Manage Your Account

The screenshot displays the 'My Account Settings' page in the Coupa Supplier Portal. At the top, a navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business, and Add-ons. A dropdown menu is open, showing 'Account Settings', 'Notification Preferences', and 'Log Out', with 'Account Settings' highlighted in a red box. The main content area is titled 'My Account Settings' and features a sidebar with 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication'. The 'User Details' section contains input fields for First Name (Luna), Last Name (Shelby), and Email (lunashelbytest@gmail.com), along with dropdown menus for Department and Role, and a 'Save' button. The 'Change Password' section includes fields for Current Password, Password, and Password Confirmation, with a 'Save' button and a note: 'Use at least 8 characters and include a number and a letter.'

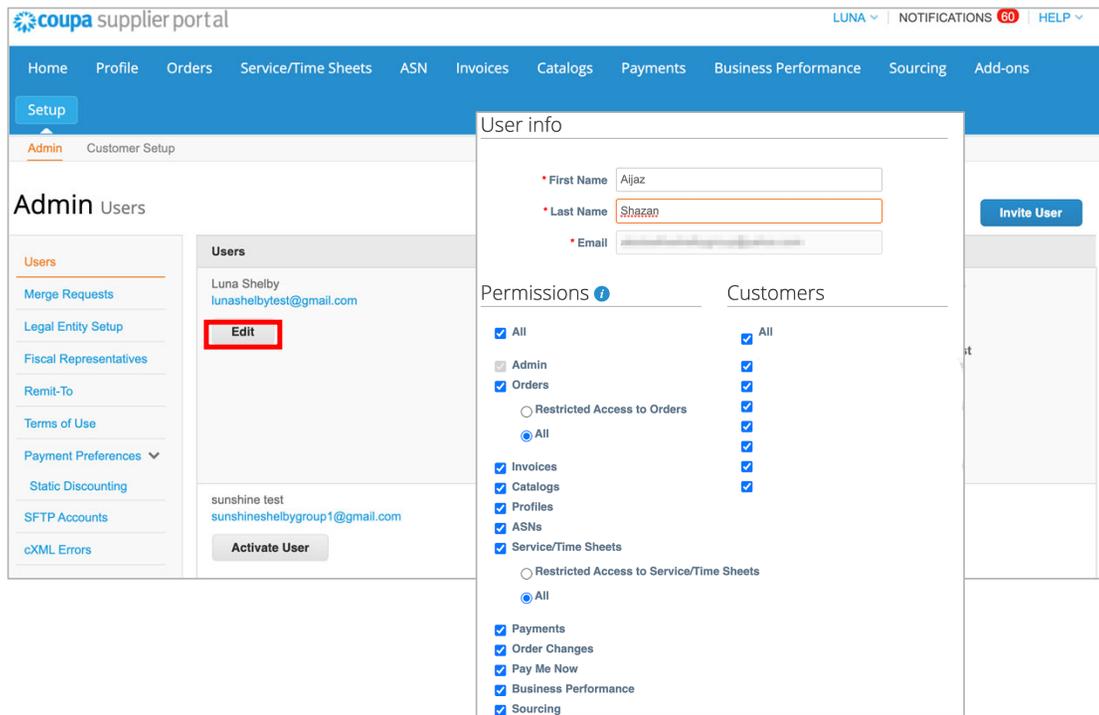
- On the My Account Settings page, you can make changes to your personal information (name, department, role, and password).
- Set or modify your notification preferences.
- Security & Two-Factor Authentication - enable/disable.

Admin



- Users - Manage permissions and customer access.
- Merge Requests - Manage accounts & merge requests.
- Legal Entities - Setup your account to create e-invoices by adding legal entities / remit-to addresses.
- Remit-to - Provide remit-to address and associated tax information to meet compliance regulations when invoicing.
- Terms of Use - View and sign the terms of use to work with the CSP.

Manage User Permissions



- To manage the permissions of a user, first press edit on the user you would like to edit permissions for
- Selecting permissions will also adjust the view on the home page
 Example: If user has permission to invoices and orders then that user will only see those specific tabs on their CSP home page
- Next, select the permissions you would like this user to have access to
- You also have the ability to select which customers your users have access to

Legal Entity Setup

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below the navigation bar, there is a 'Setup' dropdown menu with 'Admin' selected. The main content area is titled 'Admin Users' and features a table with columns for 'Users', 'Permissions', and 'Customer Access'. A red box highlights the 'Legal Entity Setup' option in the left-hand navigation menu.

- To create your legal entity, select legal entity setup from the Admin Bar.
- Next, select Add Legal Entity

The screenshot shows the 'Admin Legal Entity Setup' page. The page title is 'Admin Legal Entity Setup'. On the left side, there is a navigation menu with options: 'Users', 'Merge Requests', 'Legal Entity Setup' (highlighted in orange), 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Payment Preferences', 'Static Discounting', 'SFTP Accounts', and 'cXML Errors'. On the right side, there is a table with the following data:

Legal Entity	
▼ <i>Alaris Real Compliant</i>	Actions ▾
▼ <i>Alaris US Compliant</i>	Actions ▾
▼ <i>Alaris New Supplier</i>	Actions ▾

A red box highlights the 'Add Legal Entity' button in the top right corner of the page.

Legal Entity Setup (Cont.)

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

1. * Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

2.

What address do you invoice from?

3. * Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region United States

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

4. Country/Region

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

1. First, add the name of your Legal Entity and the Country/Region that you do business in. Then Click Continue.
2. On the next screen you'll need to input some additional information.
3. Add your Invoice From address first.
 - Do note that you will be able to use the same address as your Remit-To Address and your Ship From address by leaving those boxes checked

All remitTo Codes will be provided by Weir Minerals

4. Next you can enter a Tax ID and an Invoice From code, but they are not required.

Legal Entity Setup (Cont.)

Where do you want to receive payment?

1 2 3 4

• Payment Type Address

What is your Remit-To Address?

Address Line 1 1234 Test Street

Address Line 2

City Schaumburg

State IL

Postal Code 60173

Country/Region United States

5.

Cancel Save & Continue

5. Next, confirm the address where you would like to receive payment. Click Save and Continue on the first screen to confirm the remit to you have already set up.

6. Next, you can again confirm the Remit-To you just set up. If you need to add an additional Remit-To, select the Add Remit-To button. If not, then click next.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	1234 Test Street Schaumburg IL 60173 United States	Active	Manage

6.

Deactivate Legal Entity Cancel Next

Legal Entity Setup (Cont.)

7. Next, validate your Ship From address. If you need to add additional Ship From addresses, select the Add Ship From button and add the addresses.
 - When you are finished, press Done.
 - You will then see the green check mark letting you know that you have successfully completed the setup of your Legal Entity.

Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. [Add Ship From](#)

Title	Status	Manage
1234 Test Street Schaumburg IL 60173 United States	Active	Manage

7.

Deactivate Legal Entity
Done

Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

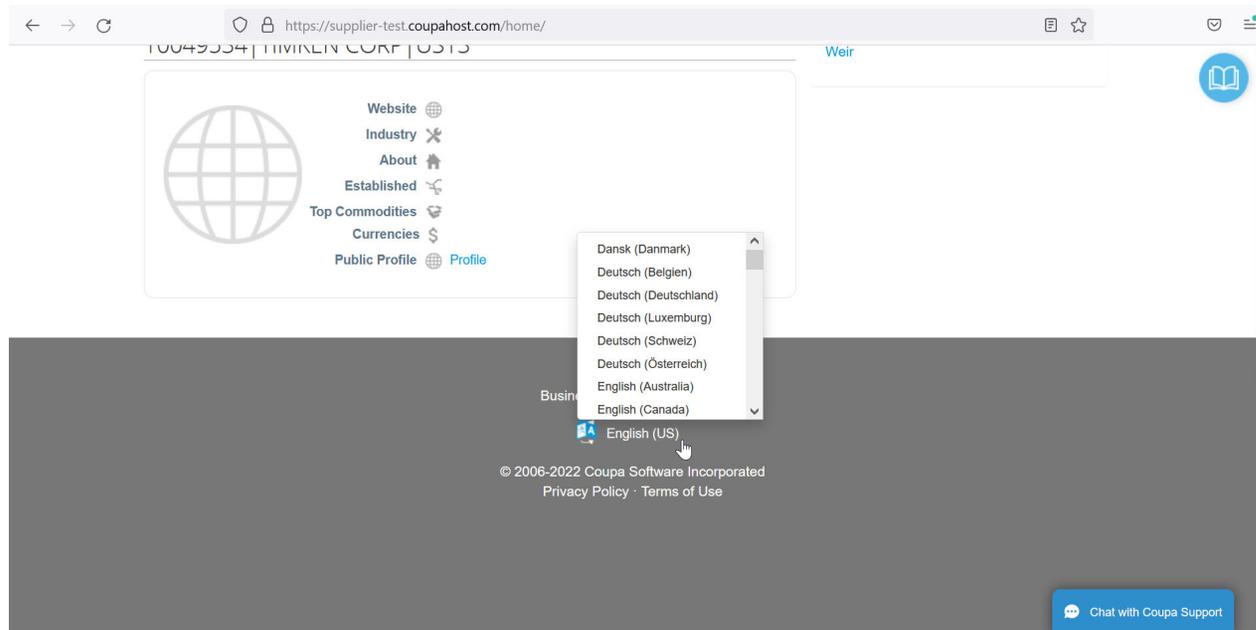
To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.**

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

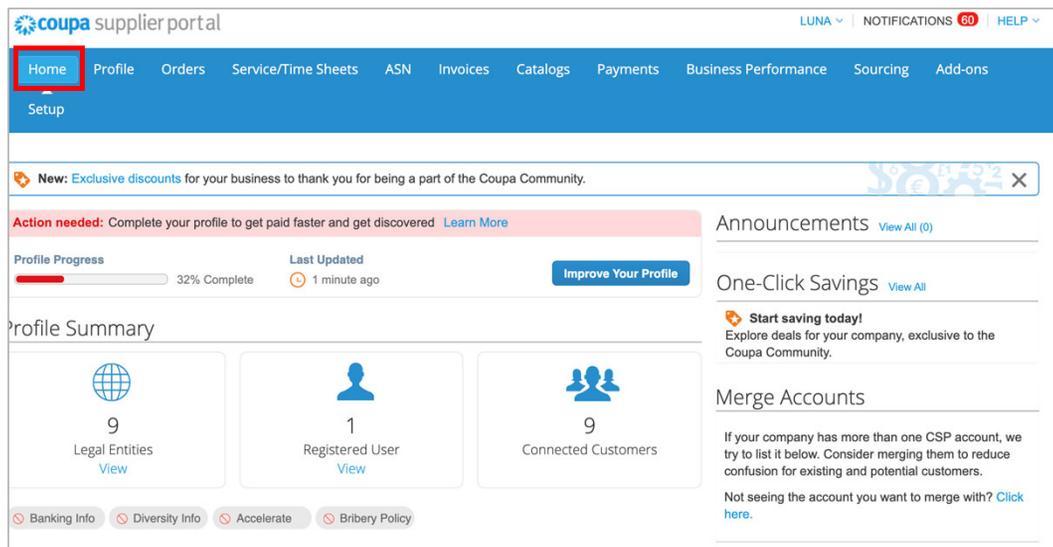
Go to Orders
Go to Invoices
Return to Admin
Done

Localization date format & decimals setup (Cont.)

7. To change your date format to DD/MM/YY (default would be US date format in MM/DD/YY), or decimals format, scroll down to the bottom of the page and select your region as necessary



Home Screen



Navigation Bar

- Reviewing, acknowledging orders or submitting invoices is simple by accessing them through the navigation bar. You can also configure your profile/account and administer your connection through the CSP.
- Access to these tabs provides you with real-time status of orders and invoices with Weir Minerals .
- You can even communicate through the CSP to Weir Minerals through comments section of invoices and purchase orders.

Your Public Profile

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'LUNA', 'NOTIFICATIONS 60', and 'HELP' are on the right. A blue navigation bar contains the following items: Home, Profile (highlighted with a red box), Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below this is a 'Setup' section with 'Your Public Profile' and 'Your Customer Profiles' links. The main content area is titled 'Luna' and is divided into two columns. The left column contains a large, dark, rectangular area with a white border, which is a redacted profile picture. To its right, there is a 'Contact Information' section with the following details: Address (123 Luna Cir, Carol Stream, IL, 60188, United States), Primary Contact (Luna Shelby, lunashelbytest@gmail.com), Work Phone, Mobile Phone, and Fax Number. Below the contact information is a 'Description' section with the text 'Moonlight'. At the bottom right of the page is a blue 'Edit Profile' button.

- There is a link on the homepage that will take you to your public profile and a button that you can use to update your profile.
- You can also update your profile using the profile menu button.

Purchase Orders

Purchase Orders

Instructions From Customer
 TESTING ONLY - THIS IS NOT A PURCHASE ORDER - TESTING ONLY
 Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
6500000177	08/17/20	Soft Closed	None	1 Each of Rent	No	100.00 USD		
6500000176	08/17/20	Soft Closed	None	Rent	No	100.00 USD		
6500000145	08/11/20	Issued	None	Rent	No	100.00 USD		
6500000099	07/15/20	Issued	None	20 Each of Test 505	No	1,000.00 USD		
6500000098	07/15/20	Issued	None	5 Each of Test 404	No	3,300.00 USD		

- By selecting the Orders tab in the main menu bar, the Purchase Orders page data table appears.
- From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.
- Under the PO Number column click on the number to open and view the PO.
- Click the Icons under the action's column for the following actions.
 - Gold coins flips the PO into an invoice.
 - Red coins create a credit note

Purchase Orders (cont.)

The screenshot shows a Purchase Order (PO) management interface. Key elements highlighted in red boxes include:

- Acknowledged** checkbox (checked).
- Request Change** button.
- Reason for Change** dropdown menu with options:
 - Cannot fulfill order quantity/amount
 - The ordered item is no longer available
 - Cannot fulfill orders by the Need-by date
 - Other
- Submit Change Request** button.

The interface also displays a table of PO lines with the following data:

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test	50	each	10.00	500.00	50.00

Additional details shown include: Need By Date: 25/11/20, Total USD: 500.00, and buttons for Create Invoice, Request Change, Save, and Print View.

- When viewing a PO, verify that all the line quantities and shipping dates are feasible for you before acknowledging the PO
- To request a change to a PO line quantity or delivery date, you can do so directly from the portal
- Make the requested updates and submit the PO change request for Weir review

Purchase Orders (cont.)

The screenshot shows a 'Lines' section of a purchase order. It includes a table with the following data:

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test1	1	Each	54.99	54.99	0.00

Below the table, there are fields for 'Part Number' (Test1), 'Manufacturer Name' (None), and 'Manufacturer Part Number' (None). A 'Confirmed Ship Date' field is highlighted with a red box and contains a date input field with a calendar icon. At the bottom, there is a 'Total USD 54.99' box and three buttons: 'Create Invoice' (highlighted with a red box), 'Save', and 'Print View'. Arrows point from the 'Create Invoice' button to the 'Confirmed Ship Date' field.

- Adding your Confirmed Ship Date
- Invoices may also be created from an open purchase order by clicking the “Create Invoice”

ASNs

- Advanced Ship Notifications (ASN) are for alerting Weir Minerals that the order has been shipped. **ASN delivery date is mandatory**

Total	Assigned To	Actions
40.00		
20.00		Flip to ASN

- From the Orders tab in the CSP, there is a new icon to **Flip to ASN**
- When you do, the entry screen will open and you can then (1) assign the ASN#, (2) fill in shipping info, and (3) adjust quantity as needed. (4) Delete the line whenever the quantity being delivered for that line is zero
- When done, click Submit

Configure PO Delivery

Create Advance Ship Notice

1 **General Info**

ASN #

Status draft

Ship Date

Delivery Date

Ship To

Address 150 South Perry Street
Montgomery, AL 36104
United States
Location Code: AL0001

2 **Shipping Info**

Tracking Number

Carrier

Shipping Method

Ship Note

Lines

1	Description	3 Quantity	UOM	Received Quantity	Status
	PopTart Pie	2.00	Each	0	draft 4 
	Supplier Part Num	PO #	PO Line	Po Line Quantity	
	None	nT000455	1	2.0	
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty	
	Comments				

[Cancel](#) [Save](#) [Submit](#)

Invoices

The screenshot shows the Coupa supplier portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted), 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this, there's a 'Setup' section with 'Invoices', 'Invoices Lines', and 'Payment Receipts'. The main content area is titled 'Invoices' and includes a 'Select Customer' dropdown set to 'Casey's - TSG TESTERS'. Underneath, there's an 'Instructions From Customer' section with a 'Create Invoices' button. Below that are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table displays a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The table shows 12 rows of draft invoices with a total of -19.99. At the bottom, it says 'Per page 15 | 45 | 90'.

- Select the Invoices tab for the invoice page with data table to open.
- Create Invoices by selecting the following:
 - Create Invoice from PO
 - Create Invoice from Contract
 - Create Blank Invoice
 - Create Credit Note
- Select the View dropdown arrow to filter your search or enter the invoice # in the search bar.
- Open an invoice or the associated PO by clicking the Invoice # or PO # hyperlink.

NOTE: Buttons are only active for actions you can do.

Invoices (cont.)

- Fill in at least the mandatory fields (marked with a red asterisk).
- You can verify you addresses and banking details from the 'From' Tab. Your bank account detail will be under 'Remit-To-Address'. Any changes will need to be communicated to the Weir Team.
- Weir Minerals requires that you attach a file to an invoice using Image Scan. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

Create Invoice Create

General Info

*** Invoice #**

*** Invoice Date**

Payment Term WC36-Payable in 90 days due net

*** Currency**

Status Draft

*** Image Scan** No file chosen

Supplier Note

Attachments Add [File](#) | [URL](#) | [Text](#)

From

*** Supplier** Alexis Test Supplier

*** Invoice From Address** Alexis Real Complaint
Alexis
1933 N Meacham Rd
Schaumburg, IL 60173
United States

*** Remit-To Address** Alexis Real Complaint
Alexis
1933 N Meacham Rd
Schaumburg, IL 60173
United States

*** Ship From Address** Alexis Real Complaint
Alexis
1933 N Meacham Rd
Schaumburg, IL 60173
United States

To

Customer Watco-TEST

*** Ship To Address** 315 W 3rd Street
Pittsburg, KS 66762-4706
United States

Plant None

Invoice Ship Date

Invoices (cont.)

Lines

Type	Description	Qty	UOM	Price	
Qty ▾	<input type="text"/>	1.000	1 / square me ▾	0.00	0.00 ✖
PO Line	Supplier Part Number	Weir Item Number	Return		
None	<input type="text"/>	None	No		
Bulk Price & UOM					
None					
Taxes					
Tax Description	Tax Rate	Tax Amount	Tax Reference		
<input type="text" value="▾"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

- Taxes will be entered at the line level of the invoice.
- The only field you will fill in will be the Tax Amount.

Invoices (cont.)

Total Taxes

Lines Net Total	8,775.69
Lines Tax Totals	0.00
<hr/>	
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
<hr/>	
Total Tax	0.00
Net Total	8,775.69
Total	8,775.69

- Enter shipping amount and tax if applicable
- 1. Click Calculate to sum up your totals
- 2. Click Submit to send the invoice to your customer
- Note: Changing the quantity or pricing is possible but may trigger approval notifications to Weir Minerals and potentially delay payment processing



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