

**Coupa Quick
Reference Guide for
Suppliers |
First steps &
settings in the CSP**

How to Log in to the Coupa Supplier Portal (CSP)

- 1 Go to supplier.coupahost.com and click on the *Log In* pane on the right, enter your mail address and password and click 'Log In'.

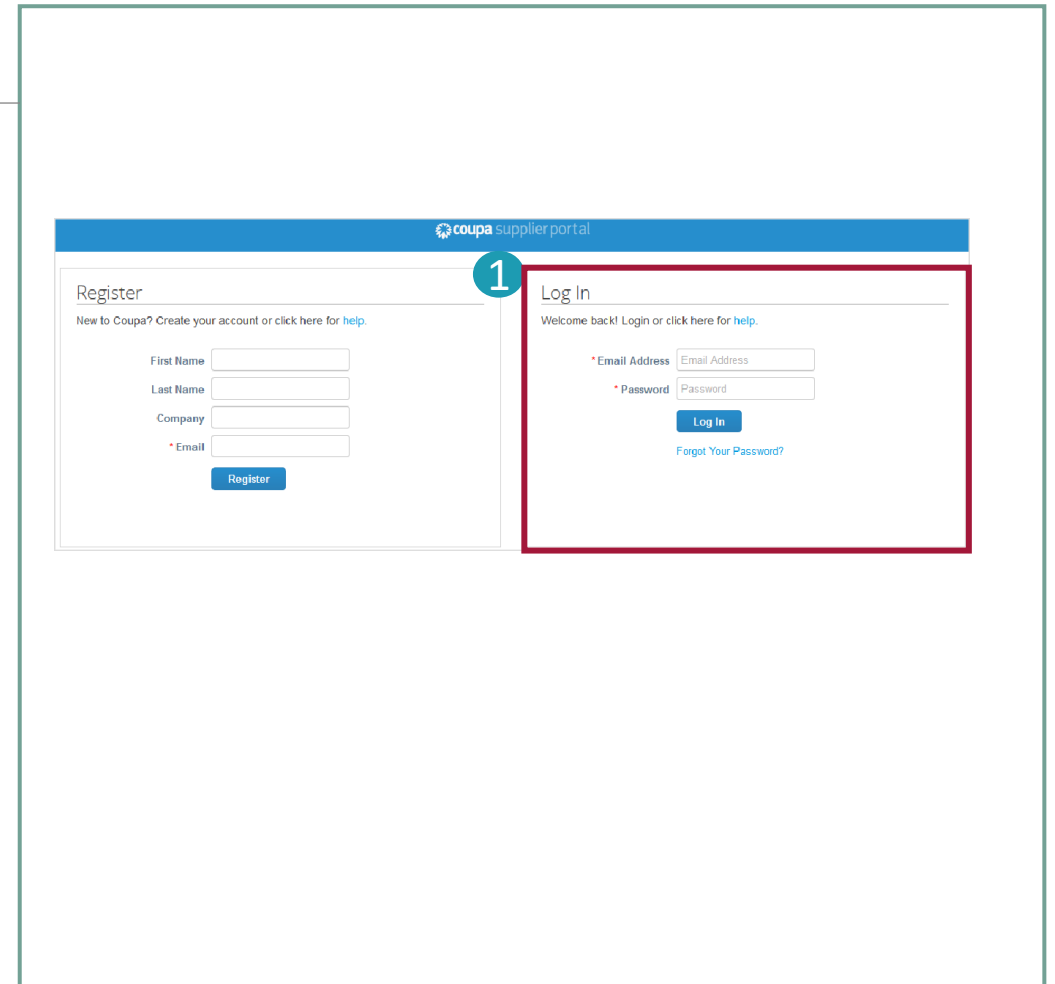
Note: After logging in to the CSP as a non-admin user, you can see a banner listing your existing permissions and the permissions you can request from your admins. CSP admins that manage users are also notified through a banner to check their users' permissions.

Two-factor authentication*

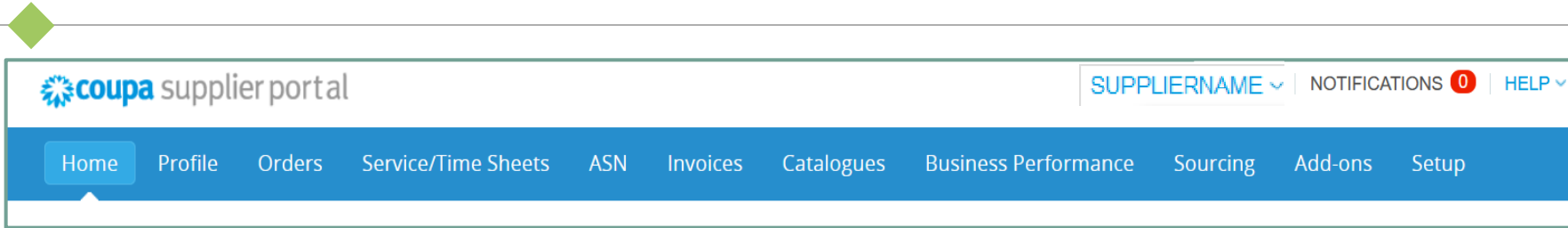
When you log in for the first time, you are prompted to enable two-factor authentication.

Please consider that this functionality is not working in every country with all telecom providers, so please contact Coupa prior to activating

To find out more, please click [here](#).



CSP Menu bar



	Menu Item	Description
Applicable to Schaeffler	Home	View and improve your public profile, see the list of customers you are connected to, edit your customer-specific company profile, and merge accounts.
	Profile	Create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
	Orders	View the Purchase Orders you received from your customers.
	Catalogues	Create and manage customer-specific catalogues.
	Setup (Admin)	Manage profile, users, merge requests, and remit-to addresses, add fiscal representatives, view and accept the Terms of Use.

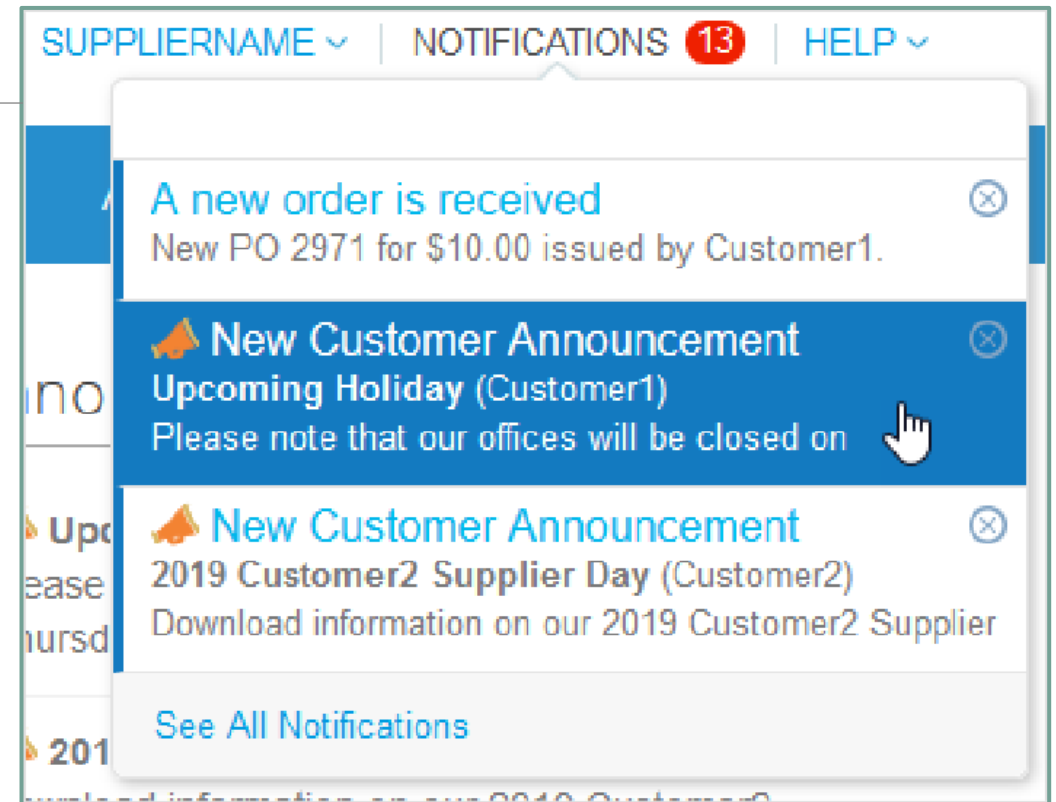
Announcements from Schaeffler on the CSP

- 1 Schaeffler is able to create announcements that will appear on your homepage and/or other Coupa Supplier Portal (CSP) pages to highlight important information concerning the collaboration and to understand onboarding requirements.

Schaeffler announcements appear at the top right section of the homepage.

Via this one-way communication, Schaeffler will:

- Provide you information necessary for transactions
- Inform you about upcoming orders,
- Remind you of updating supplier information, and more.



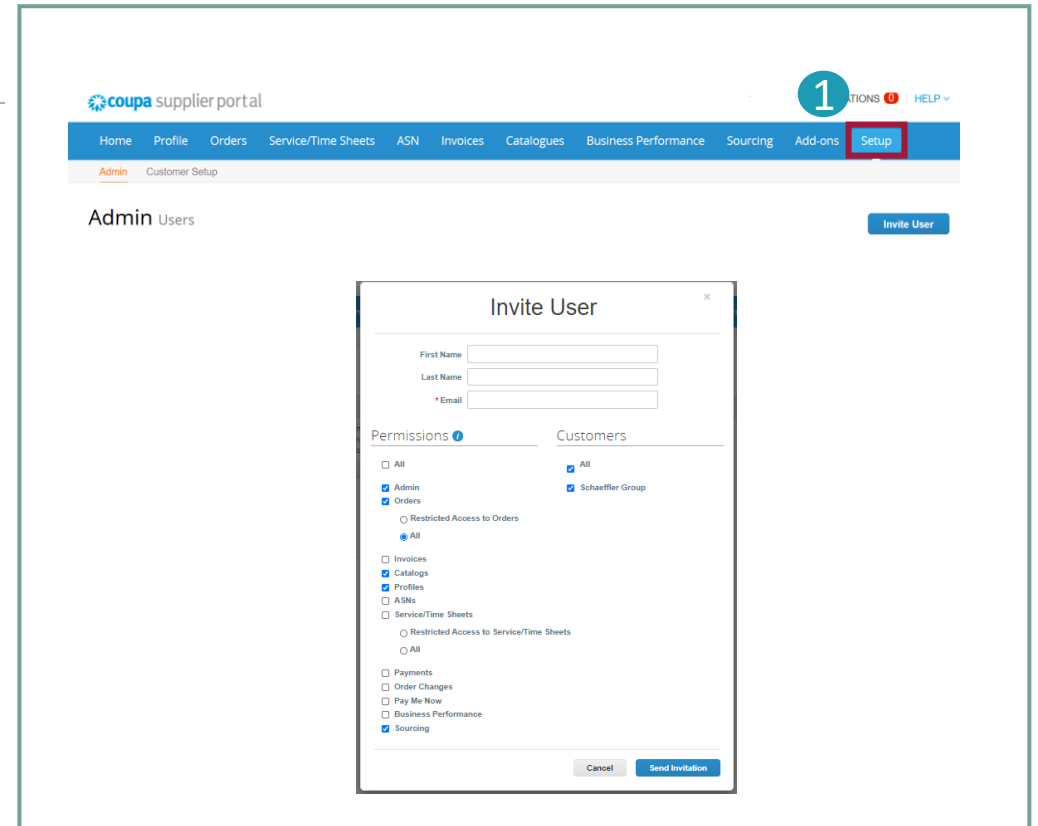
Note:

By default, only previews of the two most recent announcements are displayed. You can see the full text of an announcement in a popup after clicking on it. To view all the announcements with their full message, click on 'See All Notifications'.

Inviting additional users to the Coupa Supplier Portal

If you have multiple users within your organisation that would like to manage the CSP, you can add additional users. These should always be users within your organisation.

- 1 • To invite additional users to Coupa Supplier Portal click on the 'Setup' tab.
- Fill in the required information and select the permissions and customers you would like to assign to the added user.



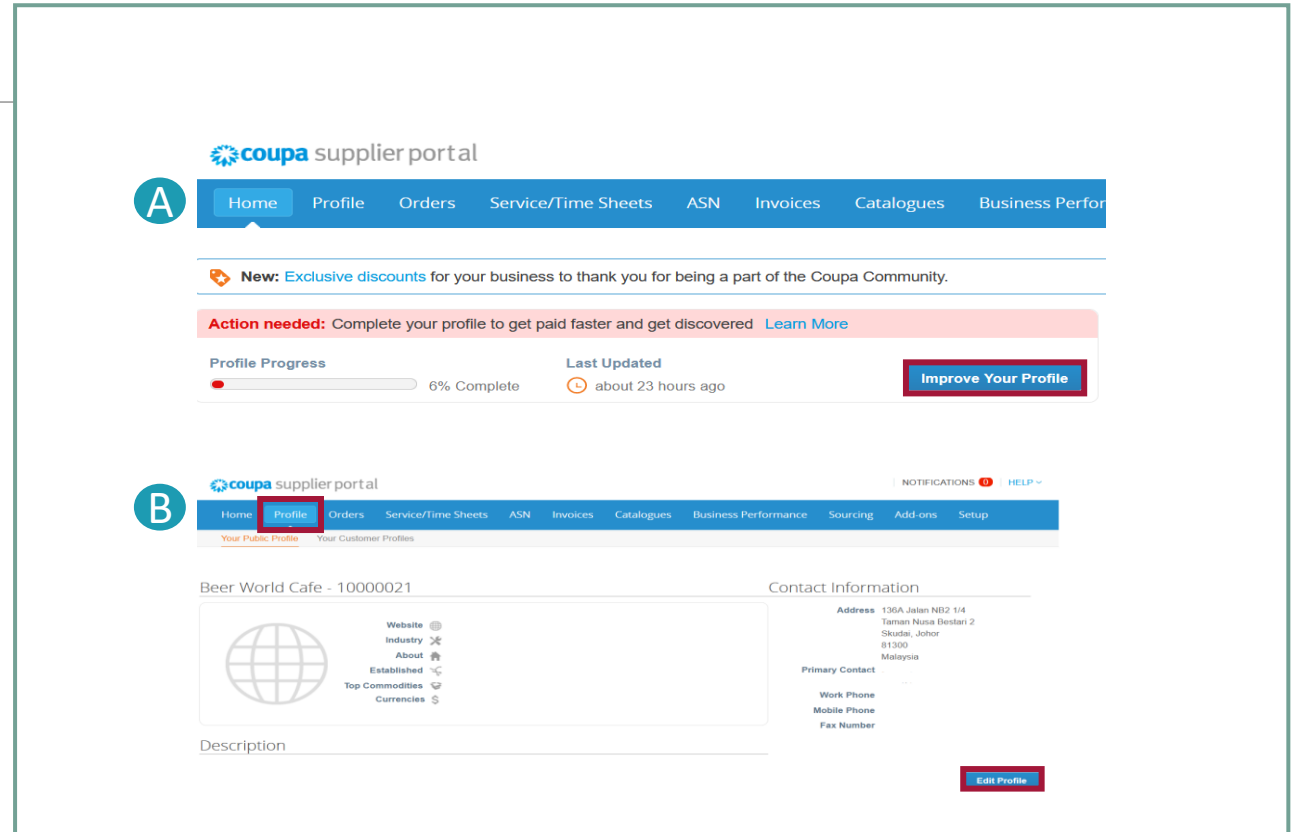
Note:

The new user will receive an invitation e-mail and can access the Coupa Supplier Portal.

Enriching your company profile on the Coupa Supplier Portal (1/2)

A Step 1 (Option A):
Starting at the CSP landing page, click on the button *'Improve Your Profile'* to change or update your company information.

B Step 1 (Option B):
Click on *'Profile'* tab, then click on *'Edit Profile'*.



Enriching your company profile on the Coupa Supplier Portal (2/2)

Step 2:

A new window will open where you can edit your information.

Click the 'Save' button from the bottom right corner of the page when you have filled in the required information.

The screenshot shows the 'Edit Profile' form in the Coupa Supplier Portal. The form is organized into four main sections:

- General Information:** Includes fields for Name (Konstantin GmbH - Gmail based), Logo (with a 'Select' button), Profile Background (with a 'Select' button), Industry (dropdown menu), Year Established, Short Description, Full Description (text area), Registered Users (schaefflercoupaest+supplierguide1@gmail.com, with an 'Add New' button), Web Site, LinkedIn Profile (http://www.linkedin.com/company/90595), Facebook Profile (http://www.facebook.com/yourcompany), and Twitter Profile (http://www.twitter.com/yourcompany).
- Address:** Includes Address Line 1, Address Line 2, City, State, Postal Code, and Country/Region (United Kingdom).
- Primary Contact:** Includes First Name, Last Name, Email, Work Phone (+1 650-555-1212), Mobile Phone (+1 201-555-5555), Fax Number (+1 201-555-5555), and PO Delivery Email.
- Financial & Legal Information:** Includes Accelerate (Enabled, Edit Preferences), Currencies (Select Some Options), and DUNS Number (Secure Information - not published to your public profile). There is also an 'Add Legal Entity' button and a note: 'Most customers require Legal Entity information for invoicing'.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.



Note:

- Mandatory fields are marked with a red asterisk (*).
- Please keep your information regarding **address** (mandatory fields: address line 1, city, state, postal code, and country) and **contact information** (mandatory fields: first name, last name, and email address) always up to date.

Merge Accounts (1/2)

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses. In this case we recommend to merge accounts by following the instructions (Option 1 or Option 2) listed below.

- Option 1:**
 The CSP lists all CSP accounts (based on email domains), which can be merged in the right-hand column on the **home** tab. If you want to merge an account, click on the *'Request Merge'* button and select an account to be the parent account.

The screenshot shows the Coupa Supplier Portal Home page. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. A red banner at the top indicates an action needed to complete the profile. The main content area features a Profile Progress bar (6% Complete), a Last Updated timestamp (about 3 hours ago), and an Improve Your Profile button. Below this is a Profile Summary section with three cards: Legal Entity (0), Registered User (1), and Connected Customer (1). At the bottom of the summary are tags for Banking Info, Diversity, Accelerate, and Bribery Policy. On the right side, there are sections for Announcements, One-Click Savings, and a Start saving today! promotion. The Merge Accounts section is highlighted with a red box and contains a red circle with the number 1. It includes a warning message about merging accounts and a list of two suppliers, SupplierA and SupplierB, each with a Request Merge and Remove button.



Note:

In case you are aware that an email address is invalid, click on the Remove button and the email address will not show up in the Merge Accounts section again.

Merge Accounts (2/2)

Option 2:

- 1 Click on the tab “Setup” in the main menu bar.
- 2 Click on “Merge Requests” and include the mail address you would like to request the merge for.
Option 2 is recommended to use if the list of suggested accounts is too long and you wish to merge a specific address directly.

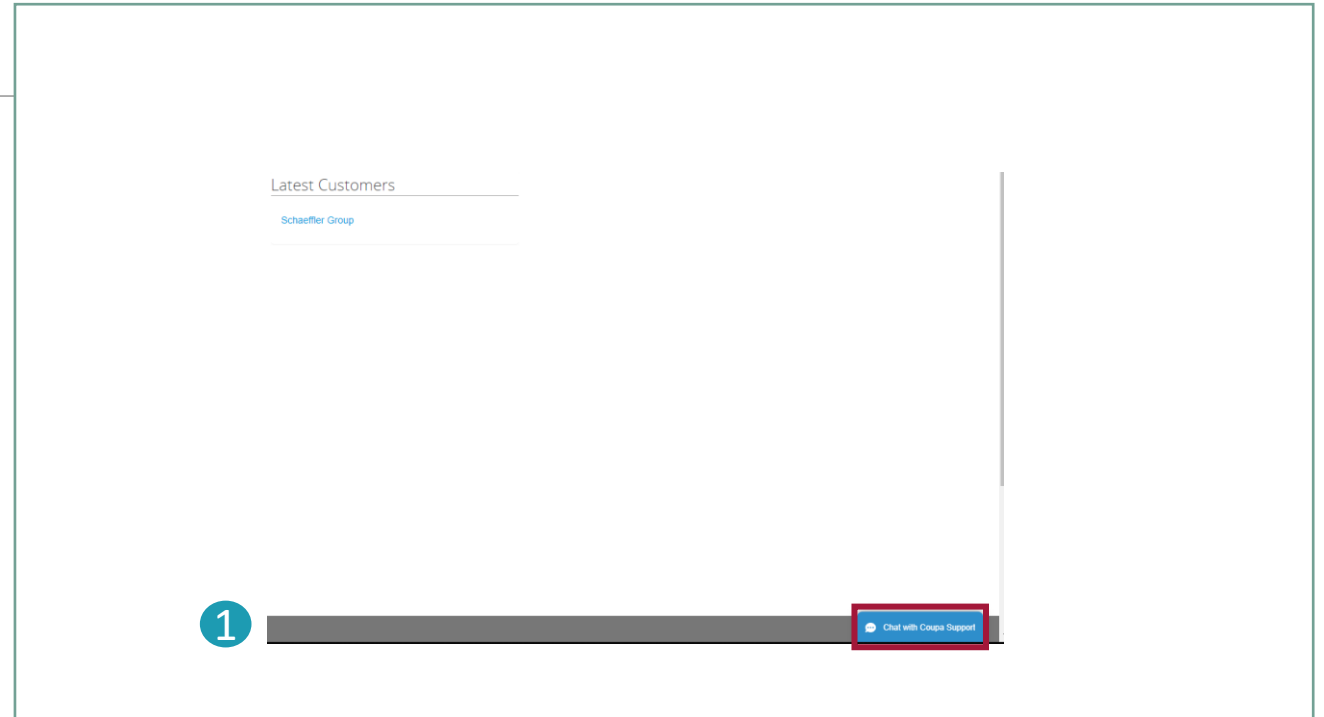
The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'TESTS | NOTIFICATIONS 1 | HELP' is on the right. A blue navigation bar contains the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The 'Setup' item is highlighted with a red box and a circled '1'. Below the navigation bar, the 'Admin' section is active, showing 'Customer Setup' and a list of options: Users, Merge Requests (highlighted with a red box and a circled '2'), Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, and SFTP Accounts. The 'Merge Requests' page is titled 'Admin Merge Requests' and features an 'Initiate Merge Request' form. The form includes an email input field with 'supplier@supplier.com', a 'Request Merge' button, a reCAPTCHA widget (highlighted with a red box), and a confirmation statement: 'By submitting the merge request, I confirm that the user whose email address I am providing belongs to my organisation.' Below the form, there is a section for 'Open merge requests' which currently shows 'All clear! No open merge requests.'

Coupa Supplier Help Desk



If you face any technical issues with the Coupa Supplier Portal you can request live support by Coupa.

- 1 Navigate to the bottom right of your screen and click on the button *'Chat with Coupa Support'*.



Note:

For any Schaeffler related questions, please reach out to your contact at Schaeffler Purchasing.