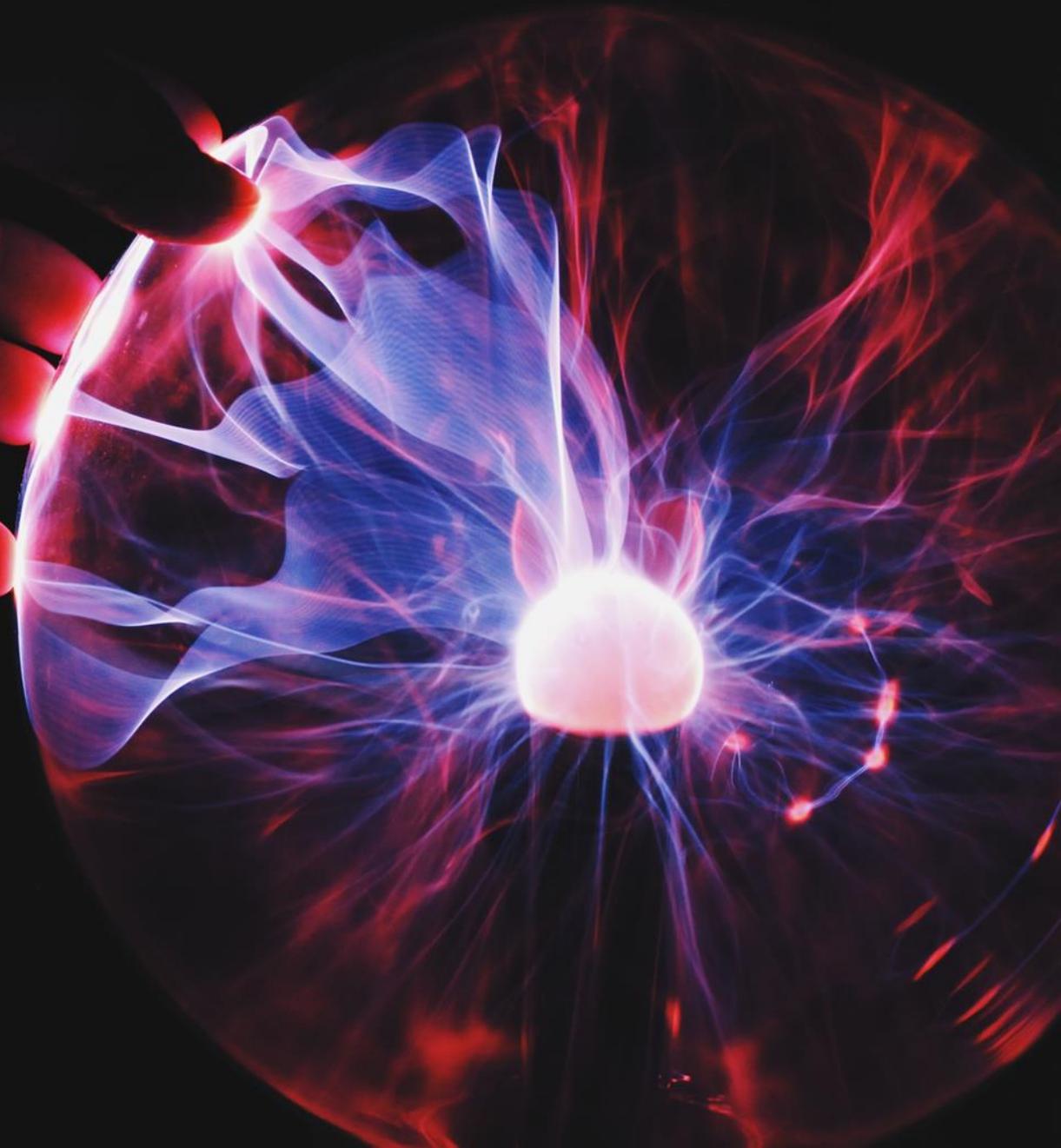


KANTAR

Coupa Supplier Portal (CSP)
Training
Maintaining your CSP account



Agenda

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1. Navigating the CSP & Setting up a Profile

An aerial night photograph of a city, likely San Francisco, showing a dense network of glowing yellow and orange lights from buildings and streets. The city is set against a dark background, with the lights forming a complex web of lines and clusters. The text '1. Navigating the CSP & Setting up a Profile' is overlaid in white, bold font across the upper portion of the image.

Navigating the CSP: Homepage Overview

1. **Account:** Your user account name.
2. **Menu:** CSP menu.
3. **Notifications:** Allows you to view notifications or to manage your notification preferences.
4. **Help:** Access the CSP help menu.
5. **Merge Accounts:** If applicable, use this section to merge multiple CSP accounts.
6. **Latest Customers:** List of all your customers on Coupa.

The screenshot shows the Coupa Supplier Portal homepage. At the top, the header includes the Coupa logo and 'supplier portal' text. On the right side of the header, there are three callouts: '1' next to 'URVI', '3' next to 'NOTIFICATIONS 13', and '4' next to 'HELP'. Below the header is a navigation menu with callout '2' pointing to the 'Home' link. The main content area features a 'Recommended' banner with a 'Learn More' link and a 'Profile Progress' section with five icons and a 'Last Updated 6 days ago' timestamp, with a callout '1' pointing to the 'Improve Your Profile' button. The 'Profile Summary' section contains three cards: '4 Legal Entities View' (callout '4'), '1 Registered User View' (callout '1'), and '2 Connected Customers' (callout '2'). Below these are tags for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The 'Urvi Test 18' section has a callout '6' pointing to the 'Profile' link in the 'Public Profile' list. On the right sidebar, there are sections for 'Announcements View All (0)', 'One-Click Savings View All', 'Merge Accounts' (with a callout '5' pointing to the 'Request Merge' button), and 'Latest Customers' (with a callout '6' pointing to the 'Kantar TEST Approval Notification' link).

Navigating the CSP: Homepage Overview

1. **Home:** Brings you back to the home menu.
2. **Profile:** Allows you to update your profile.
3. **Orders:** Access the purchase order section to view and acknowledge purchase orders and flip a PO into an invoice and/or credit note.
4. **Service/Time Sheets:** Allows you to submit service time sheets. Not used by Kantar.
5. **ASN:** Allows you to submit advance shipping notifications.
6. **Invoices:** Access the invoices section to view and submit invoices.
7. **Catalogues:** Access any catalogs you have set up for Kantar users
8. **Business performance:** Your simple business performance data with Coupa.
9. **Sourcing:** View public sourcing events made by companies on the Coupa community
10. **Add-ons:** These are added features from Coupa that you may wish to leverage as a supplier
11. **Setup:** Allows you to maintain your admin settings: invite additional users, set a remit to address, etc.

The screenshot displays the Coupa Supplier Portal interface. At the top, the user is identified as 'Urvi Test 18' with a notification badge showing '13'. The navigation menu includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The main content area is divided into several sections: a 'Recommended' banner, a 'Profile Progress' section showing 'Last Updated 6 days ago' and an 'Improve Your Profile' button, a 'Profile Summary' section with three cards (4 Legal Entities, 1 Registered User, 2 Connected Customers), and a list of tags (Banking Info, Diversity, Accelerate, Bribery Policy). The bottom section is titled 'Urvi Test 18' and features a globe icon and a list of links: Website, Industry, About, Established, Top Commodities, Currencies, and Public Profile.

2. Inviting Additional Users



Inviting Additional Users

- 1. Once you are logged into the CSP, click **Setup** in the top menu. Then click **Invite User** in the **Users** section.

The screenshot shows the Kantar CSP Admin Users interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The Setup button is highlighted with a red box. Below the navigation bar, the Admin Users section is visible, with an Invite User button also highlighted with a red box. The main content area displays a table of users with columns for Users, Permissions, and Customer Access. The table contains one user entry for Kantar Supplier.

| Users | Permissions | Customer Access |
|---|---|-----------------|
| Kantar Supplier kantarsupplier@gmail.com Status: Active Edit | ASNs Admin Business Performance Catalogues Invoices Order Changes Order Line Confirmation | Kantar |

Inviting Additional Users

2. Complete the required information and click **Send Invitation**. You can control the permissions and customers that the invited user has by checking/unchecking the options under **Permissions** and **Customers**.

Once the invited user registers, they will be able to log into the CSP using their own log in credentials.

The screenshot displays the 'Invite User' dialog box, which is divided into several sections:

- Form Fields:** Fields for 'First Name', 'Last Name', and '*Email' are provided for user identification.
- Permissions:** A section with an information icon (i) containing a list of permissions with checkboxes: All, Admin, Orders, Restricted Access to Orders, All, Invoices, Catalogues, Profiles, and ASNs.
- Customers:** A section containing a list of customers with checkboxes: All and Kantar.
- Service/Time Sheets:** A section with a checked checkbox for 'Service/Time Sheets', a radio button for 'Restricted Access to Service/Timesheets', and a selected radio button for 'All'. Below this are checked checkboxes for Payments, Order Changes, Pay Me Now, Business Performance, Sourcing, and Order Line Confirmation.
- Buttons:** 'Cancel' and 'Send Invitation' buttons are located at the bottom right of the dialog.

3. Creating Reports & Downloading Invoices



Creating Reports

You can create a custom report anywhere where you see a **View** drop down field. This example shows how to create a report in Invoices section.

Click on the **Invoices** tab and in the **View** drop down field click **Create View**.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted with a red box), 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. The main content area is titled 'Invoices' and includes a 'Select Customer' dropdown menu set to 'Kantar'. Below this, there are instructions from the customer and a 'Create Invoices' button. There are four buttons for creating invoices: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table is displayed with columns: 'Invoice #', 'Created Date', 'Status', 'PO #', 'Gross Total', 'Unanswered Comments', and 'Actions'. The table is currently empty, showing 'No rows.' Below the table, there is a pagination control showing 'Per page 15 | 45 | 90'. A 'View' dropdown menu is open, showing a list of view options: 'All', 'Abandoned', 'Approved', 'Credit notes', 'Disputed', 'Disputes with a supplier response', 'Disputes without supplier response', 'Draft', 'Overdue invoices', 'Payment Information', 'Pending Approval', 'Processing', 'Unpaid invoices', and 'Voided'. The 'Create View' option at the bottom of the dropdown is highlighted with a red box.

Creating Reports

- 1. Name:** Provide a name for your report (must be less than 30 characters).
- 2. Select Customer:** Allows you to select the invoices for a specific customer. Select **Kantar**.
- 3. Visibility:** Choose who can see your report. If you select **Only Me**, this report is only visible to you. If you select **Everyone**, all other users within your organisation will be able to see your report.
- 4. Start with View:** Allows you to set a starting condition for your report (i.e. Start with unpaid invoices).
- 5. Conditions:** Select Match All Conditions or Match at least one condition to identify if you want your report to match all conditions or any conditions.
- 6. Add group of conditions:** Allows you to add groups of conditions and then select **Match all conditions from at least one group** or **Match at least one condition from every group**.

The screenshot shows the 'Create New data table view' interface. At the top right, there is a 'Select Customer' dropdown menu with 'Kantar' selected, marked with a yellow box and the number 2. Below this is the 'General' section with three fields: 'Name' (input field, marked with 1), 'Visibility' (radio buttons for 'Only Me' and 'Everyone', with 'Only Me' selected, marked with 3), and 'Start with view' (dropdown menu set to 'All', marked with 4). The 'Conditions' section features a 'Match Conditions' dropdown set to 'Match all conditions' (marked with 5) and an 'Add group of conditions' button (marked with 6). Below this is a filter configuration row with 'Filter By' set to 'Invoice #', 'Filter Clause' set to 'is', and an empty 'Filter Text' input field. The 'Columns' section includes a descriptive paragraph and two columns: 'Available columns' (with 'Commented', 'Comments', and 'Date Of Supply') and 'Selected columns' (with 'Invoice #', 'Created Date', and 'Status').

Creating Reports

7. **Columns:** Drag and drop fields from the **Available Columns** section to the **Selected Columns** section.

You can drag and drop the fields to re-order the order you want the columns to appear in your report. All fields under **Selected Columns** will be viewable in your report.

8. **Default Sort Order:** Allows you to sort your data by specific criteria.

9. Click **Save** to save the report.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

| Available columns | Selected columns |
|-------------------------|---------------------|
| 7 Commented | Invoice # |
| Comments | Created Date |
| Date Of Supply | Status |
| Date Of Supply | PO # |
| Delivery Number | Gross Total |
| Disputed Date | Unanswered Comments |
| Document Type | Dispute reason |
| Invoice Date | Actions |
| Last Updated Date | |
| Linked document | |
| Original Invoice Date | |
| Original Invoice Number | |
| Paid | |
| Payment Information | |
| Payment Term | |

8 Default Sort Order

Sort by in order.

9

Creating Reports: downloading your extract

10. Once you have saved the report you can click 'Export to' then select **CSV** for Excel file type.

The screenshot shows the 'Invoices' page for customer 'Kantar'. It includes a 'Select Customer' dropdown, a 'Create Invoices' section with instructions, and a table of invoices. The 'Export to' dropdown menu is open, showing options: 'CSV plain (current columns)', 'CSV for Excel (current columns)', 'Excel (current columns)', and 'Legal Invoice (zip)'. The table has columns for Status, PO #, Gross Total, Unanswered Comments, Dispute reason, and Actions.

Select Customer: Kantar

Invoices

Instructions From Customer

For any queries not responded to by the requestor of the invoice, please comment @AP in the chat or send an email to xxxxx@servicenow.com

Create Invoices i

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

- CSV plain (current columns)
- CSV for Excel (current columns)
- Excel (current columns)
- Legal Invoice (zip)

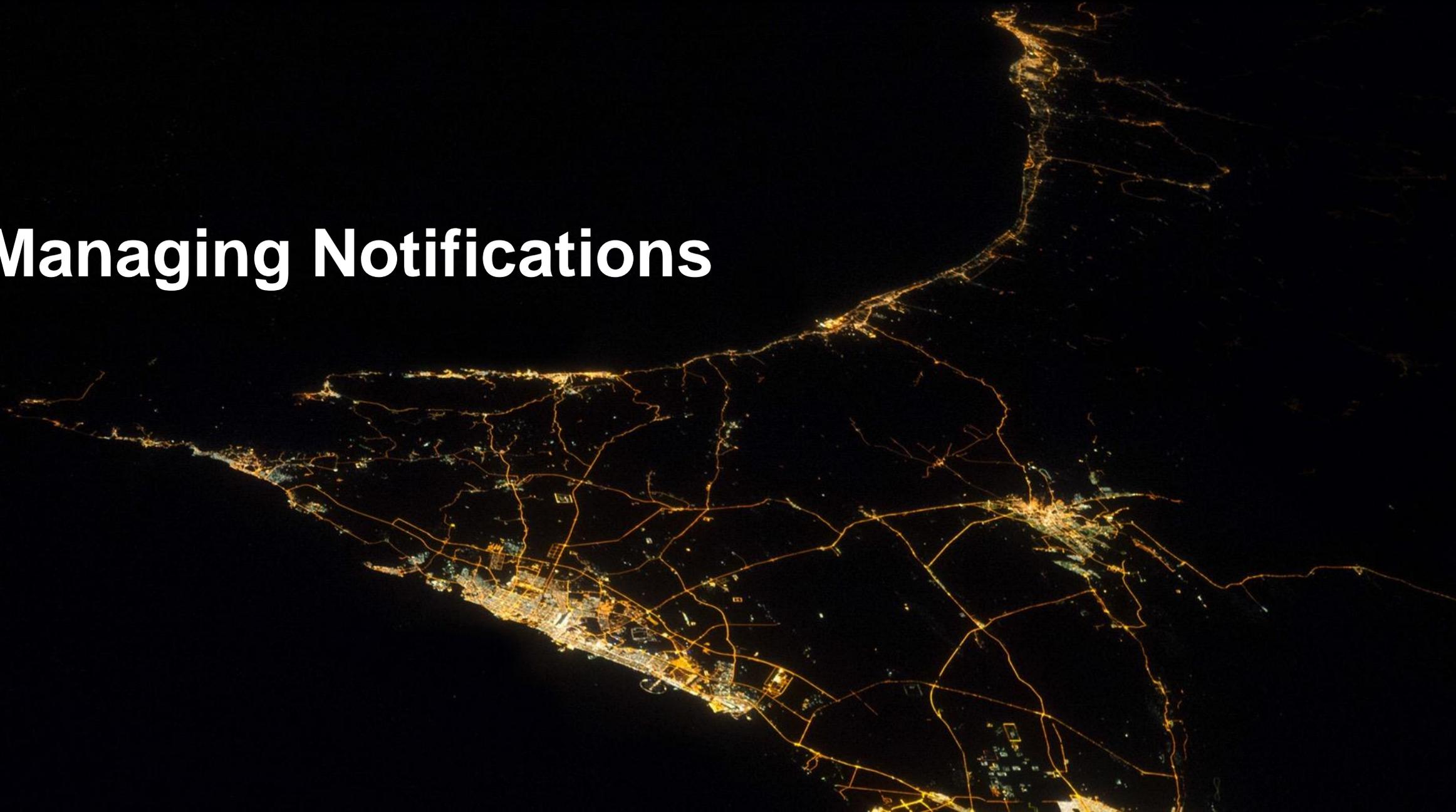
| Status | PO # | Gross Total | Unanswered Comments | Dispute reason | Actions |
|--------|------|-------------|---------------------|----------------|---------|
|--------|------|-------------|---------------------|----------------|---------|

Creating Reports: downloading invoices

11. Coupa stores all the invoices that you have created. If you need to acquire all the invoices, click 'Export to' then select Legal Invoice (zip).

The screenshot shows the 'Invoices' page in the Coupa system. At the top right, there is a dropdown menu with 'Kantar' selected. Below the title, there is a section for 'Instructions From Customer' with a link to 'Create Invoices'. A row of buttons includes 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below these buttons is a blue header bar with 'Export to' (dropdown), 'View' (set to 'All'), and a search box. A dropdown menu is open under 'Export to', listing 'CSV plain (current columns)', 'CSV for Excel (current columns)', 'Excel (current columns)', and 'Legal Invoice (zip)'. The 'Legal Invoice (zip)' option is highlighted with a red border. Below the dropdown, a table header is visible with columns: Status, PO #, Gross Total, Unanswered Comments, Dispute reason, and Actions.

4. Managing Notifications



Managing Notifications

1. You can manage your notifications by clicking NOTIFICATIONS (top right of the page) and then click Notification Preferences.

The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the top right, there are links for "KANTAR", "NOTIFICATIONS 1", and "HELP". Below this is a blue navigation bar with menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The main content area is titled "My Notifications". On the right side of this area, there is a button labeled "Notification Preferences". Below the title, there is a "View" dropdown menu currently set to "All". A table of notifications is displayed below, with a header row containing a checkbox, the text "Message", and the text "Received". The first row of the table contains a checkbox, the message text "You have existing information requests that have not been updated with your current profile information. You can update these requests with your information now.", and the timestamp "31/05/2022 09:50".

| <input type="checkbox"/> | Message | Received |
|--------------------------|---|------------------|
| <input type="checkbox"/> | You have existing information requests that have not been updated with your current profile information. You can update these requests with your information now. | 31/05/2022 09:50 |

Managing Notifications

2. You can enable / disable **Online**, **Email** and **SMS** notifications for **Announcements**, **Business Performance**, **Catalogues**, **Orders**, **Invoices**, etc.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

[Settings](#)
[Notification Preferences](#)
[Security & Two-Factor Authentication](#)

Announcements

| | | | |
|---------------------------|--|--------------------------------|------------------------------|
| New Customer Announcement | <input checked="" type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
|---------------------------|--|--------------------------------|------------------------------|

Business Performance

| | | | |
|-----------------------------------|--|--------------------------------|------------------------------|
| Business Performance Role Granted | <input checked="" type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
|-----------------------------------|--|--------------------------------|------------------------------|

Catalogues

| | | | |
|----------------------|--|---|------------------------------|
| New comment received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Catalogue approved | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Catalogue rejected | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |

Invoices

| | | | |
|--------------------------------------|--|---|------------------------------|
| New comment received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is abandoned | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Legal Invoice Export Ready | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Invoice approved | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is withdrawn from dispute | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| An invoice is disputed | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Invoice paid | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

Orders

| | | | |
|-----------------------|--|---|------------------------------|
| An order is cancelled | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| New comment received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| New PO received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

Managing Notifications

3. Once finished, click **Save** to save your notification settings.

| Profile | | | |
|---|--|---|------------------------------|
| Tier 2 Diversity report request is received | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Profile update reminder is received | <input type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | |
| Update Profile | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| Update information requests | <input checked="" type="checkbox"/> Online | <input type="checkbox"/> Email | |
| Public Profile updated | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |

| Receipt Request | | | |
|-----------------|---------------------------------|--------------------------------|------------------------------|
| Receipt created | <input type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |

| Terms of Use | | | |
|--------------|--|---|------------------------------|
| Terms of Use | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

| Users | | | |
|-----------------------------------|--|---|------------------------------|
| Add Users to account | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A new customer connection created | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

| Service/Time Sheets | | | |
|----------------------------------|--|---|------------------------------|
| A Service/Time Sheet is approved | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
| A Service/Time Sheet is rejected | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |

Thank you!

