Supplier Enablement

- April-May, 2024

Presented by

Olymel Partners Support

Feeding the world

Objective of the session

Objective

Socialize the Corporate Purchasing department's **new service offering** and ensure your **understanding of the procurement changes** coming into effect shortly.

Agenda

- **Introduction – New procurement process Indirect purchases**
- **New Coupa platform**
  - **Simplify our purchasing process**
  - **Improve collaboration with our suppliers**
  - **Optimize our ways of working**
- **Supplier Area**
- **Next steps & conclusion**

Why do we need our ways of purchasing to change?

To improve our efficiency and performance and better meet our business needs.

- Team structure and delivery model review
- Purchasing process harmonization through Coupa
- Policy and governance implementation
- Supplier relation centralization

Indirect Purchasing

Indirect purchases refer to the acquisition of goods and services that are not directly related to the production process*. These purchases remain essential for the operation of the establishment. These purchases are often necessary to support operations, maintenance, management, and employee well-being, but they are not an integral part of the final product.

Example of indirect purchase

Building General Maintenance

- Water treatment operations services
- Minor plumbing works (toilet, sink, etc.)
- General electricity (light bulbs, fluorescent lights, etc.)
- Pumping services
- Small building repairs (window repair, painting jobs, etc.)
- Ground maintenance (snow removal, landscaping)

Indirect Consumables

- Chemical product for water treatment
- PPE (Personal Protective Equipment): Gloves, helmets, ear protection, goggles, boots, uniforms, etc.
- Janitorial supplies (paper towels, soaps, cleaning products, etc.)
- Laboratory supplies
- Office supplies
- Sanitation supplies
- Ink for label printers
- Lockout/tagout, truck seals
- Two-way radio (walkie-talkie)
- Denaturing agent
- Production aid tools (scissors, knives, shovels, sieves, etc.)
- Rejection bins
- Pallets

Other Indirect Purchases

- Professional expenses (financial, legal, HR)
- Consulting services
- Subscription and membership
- External labor
- Labor transportation (bus, taxi)
- Marketing and sales expenses
- External storage expenses
- Recruitment and hiring expenses
- Expenses for foreign workers
- Office furniture
- Energy
- Communication
- Short-term rental of rolling equipment (lift truck, etc.)
- IT expenses

**Certaines exceptions s'appliquent*

Capex Purchasing

The major disbursement" is a form proposing expenses of a non-routine nature. The major disbursement includes, among other things, rentals of all kinds, acquisitions of fixed assets, and non-routine expenses.

Example of Capex expenses

Location

- Truck lease
- Car lease
- Mobile equipment lease

Assets

- Production equipment, kettle, smoker, laboratory
- Building construction (factory, barn, pigsty, shed, garage, shelter)
- Site improvement, leasehold improvement, land
- Forklift
- Rolling equipment (new and used)
- Parking and paving
- Storage and distribution equipment
- IT Equipment
- Software
- Office and cafeteria furniture
- Refrigeration equipment

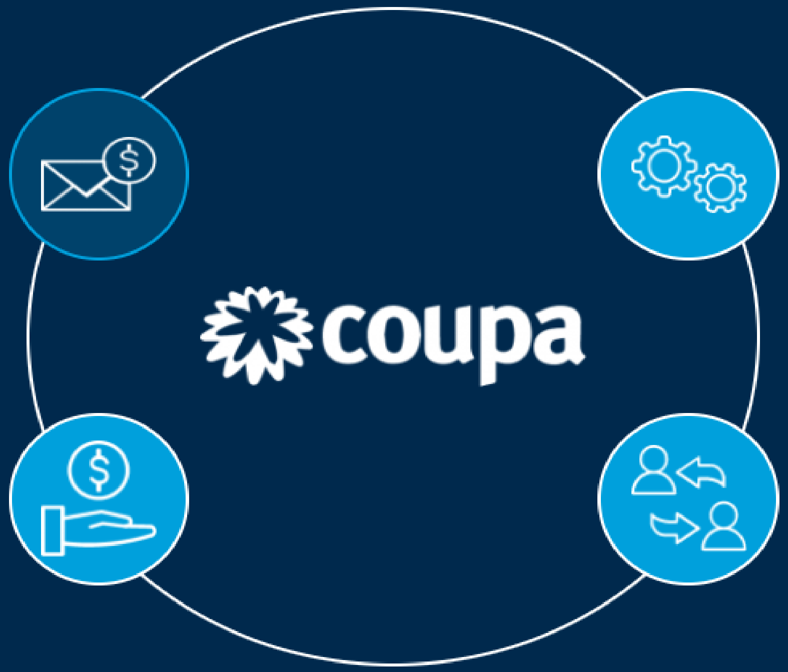
Major disbursement

- Roof, floor, wall, and compressor repairs
- Slaughter & evisceration chains
- Interior remodeling of buildings

New Coupa platform

Coupa offers many benefits for Olymel and its suppliers

SUPPORT & DOCUMENTATION



Billing Optimization and Simplification

- **Electronic transmission** of purchase orders and invoices, for tracking **in one single place.**
- **Invoices generated directly** from purchase orders.

Coupa en bref - Olymel S.E.C.

New Coupa platform – How to exchange information

Communication chanels available with Coupa

- cXML
  - Information exchange between systems (Olymel Procurement and suppliers)
- CSP
  - Coupa Supplier Portal
- SAN
  - Supplier Actionable Notification
- Email transmission

COUPA SUPPLIER TRAINING

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AGENDA

AGENDA

LEGEND

Please note that the following icons are used throughout this document to assist in your learning of new business processes:

Key Note - Key information to take note of and/or remember

Tip - Important tip or helpful information

ICONS

Commonly Used Icons
Resolve
Edit
Delete
Search
Add Line Item
Void
Home
Create Invoice
Create Credit Note

KEY TERMINOLOGY

Key Term	Description
Catalog Item	An item loaded into Coupa by Procurement with a negotiated price. These items are available for purchase by Requesters.
UoM	Unit of Measure
Currency	The item’s currency for the listed price. Users see the price in their default currency.
Commodity	Category to classify spend.
Coupa Supplier Portal (CSP)	A free online platform provided by Coupa for suppliers to manage their interactions and transactions with their customers who use Coupa. Upon registration, suppliers can: • Receive purchase orders and send invoices • Create and distribute customer-specific electronic catalogs • Manage company profiles and remit-to information

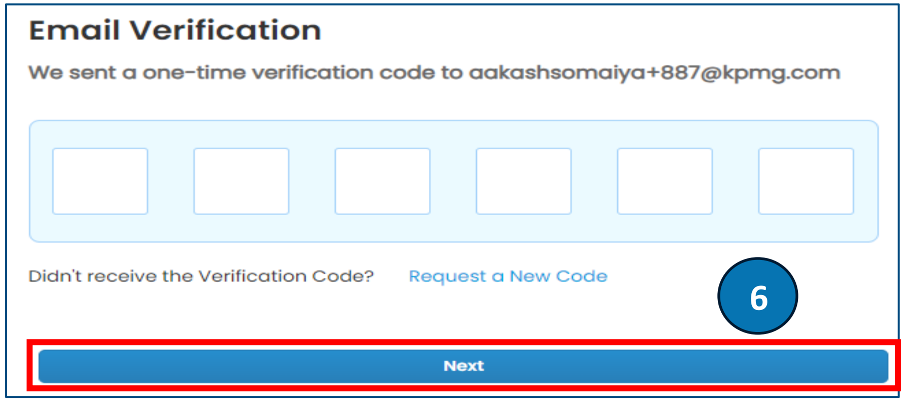
COURSE

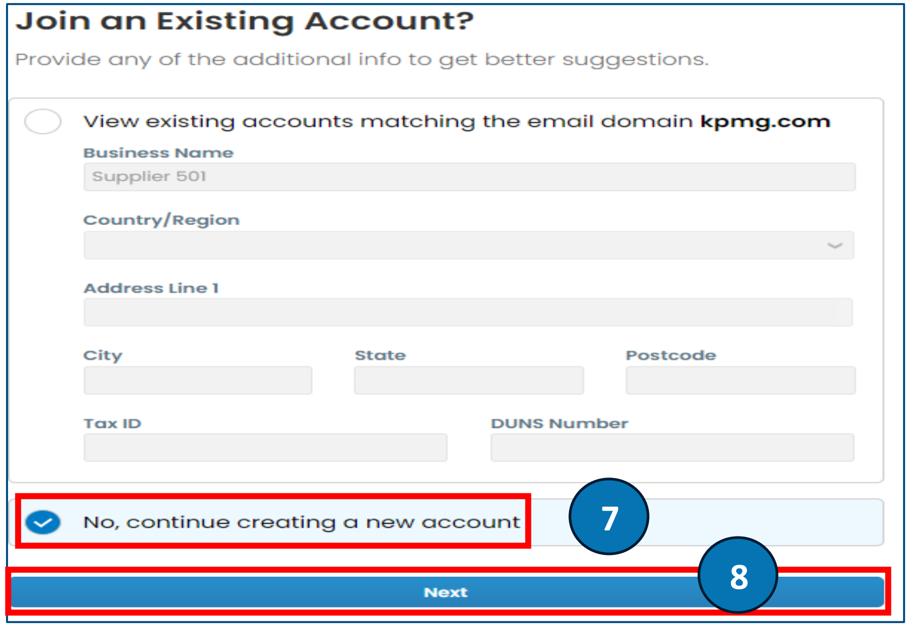
Upon completion of this course, you will be able to:

- **Register on the Coupa Supplier Portal**
- **Get an overview about CSP Homepage**
- **Invite New Users and Manage Existing Users in CSP**
- **View and Acknowledge a received PO (CSP)**
- **Create Invoice from PO**
- **Add Header level taxes on invoice**
- **Add Line level taxes on invoice**
- **Create a Credit Note**
- **Resolve Invoice Disputes**
- **View and Respond to a PO Supplier Actionable Notifications (SAN)**
- **Participate and submit responses for a sourcing event**

SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

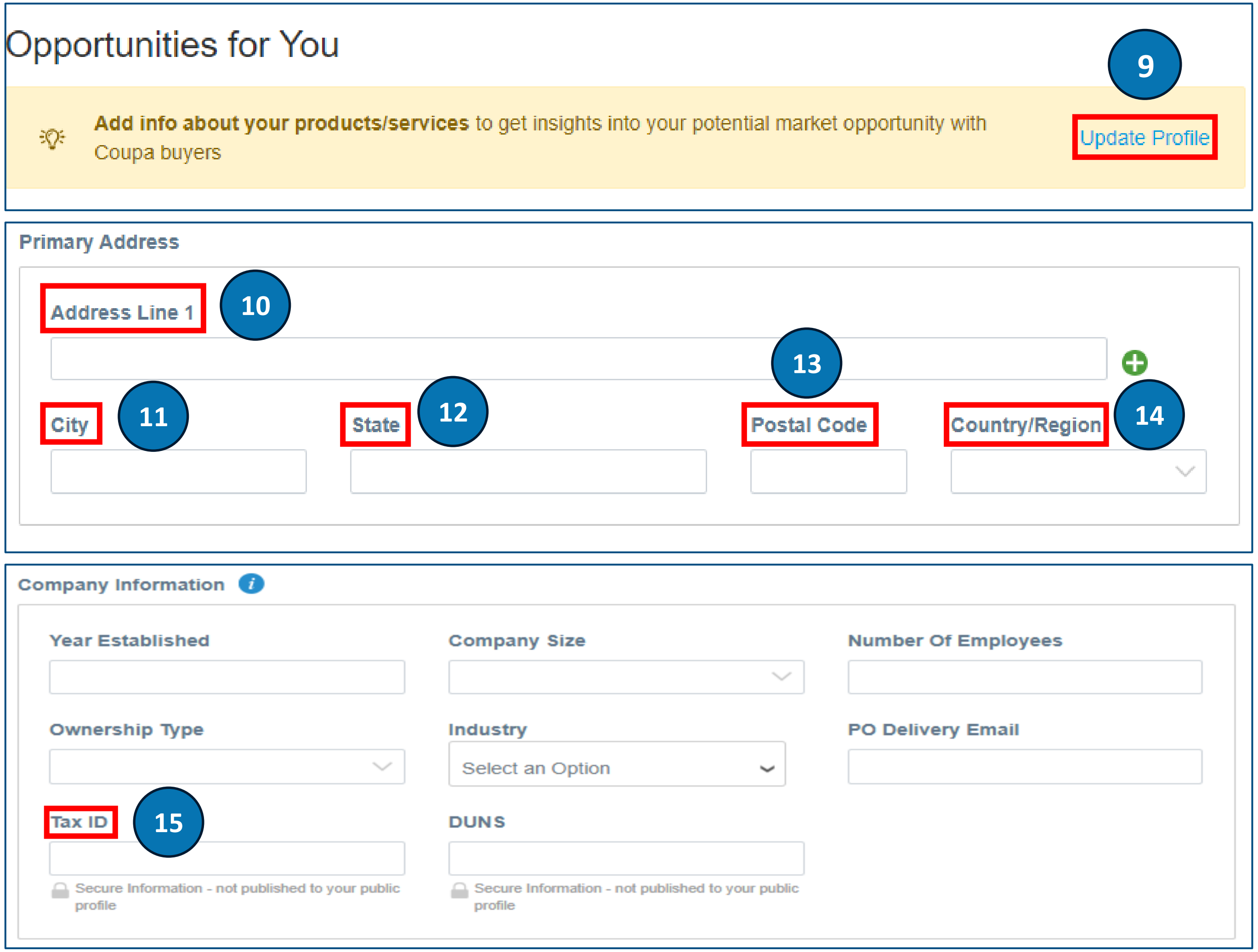
6. Enter the one-time verification code and click on **Next** button
7. Select the option "**No, continue creating a new account**"
8. Click on **Next** button





SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

9. Click on the **Update Profile** hyperlink to update the minimum information required
10. Under Primary Address section, enter the appropriate information in the **Address Line 1** field
11. Enter the **City**
12. Enter the **State**
13. Enter the **Postal Code**
14. Select the **Country/Region** from the dropdown list
15. Enter the **Tax ID** field



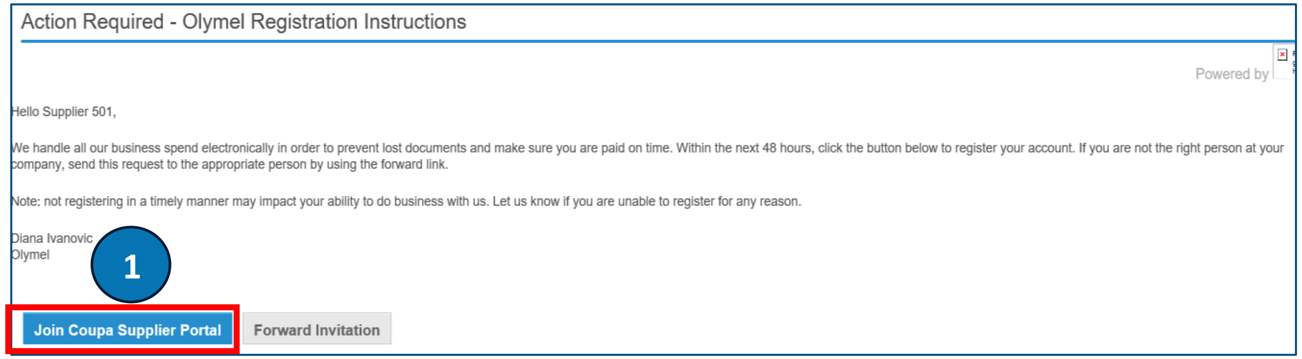
LESSON 1

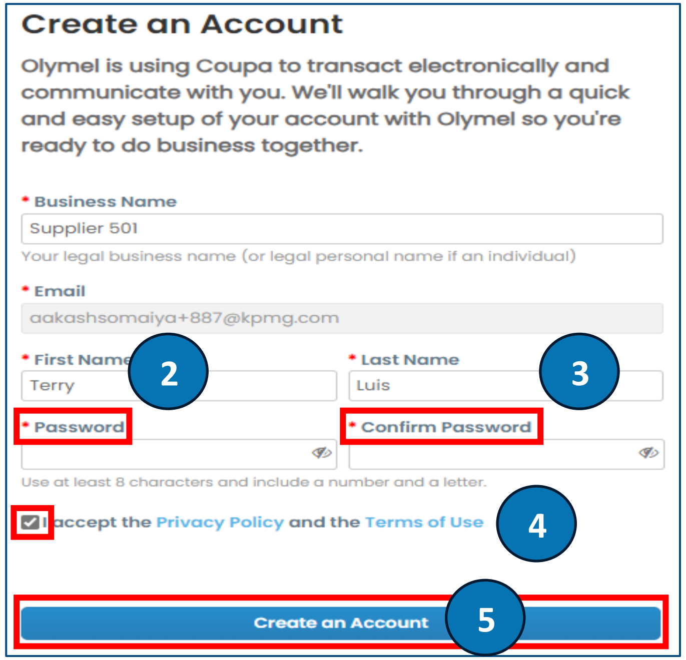
SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

Following are the steps to go through the supplier registration and invitation process for CSP

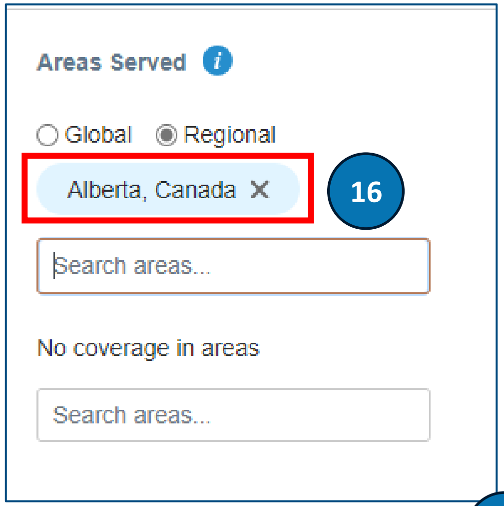
1. Click on the **Join Coupa Supplier Portal** button on the invitation received, the invitation will come through email.
2. Enter the password in the **Password** field (Mandatory)
3. Renter the password in the **Confirm Password** field (Mandatory)
4. **Check** the checkbox against the Privacy Policy and Terms of Use (Mandatory)
5. Click on **Create an Account** button

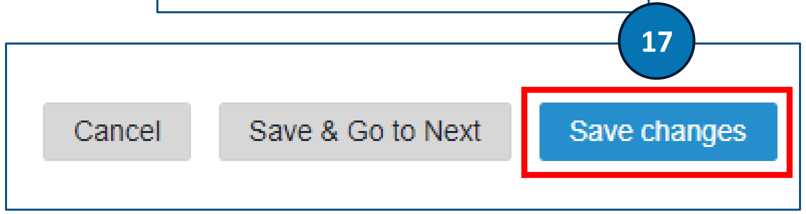




SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

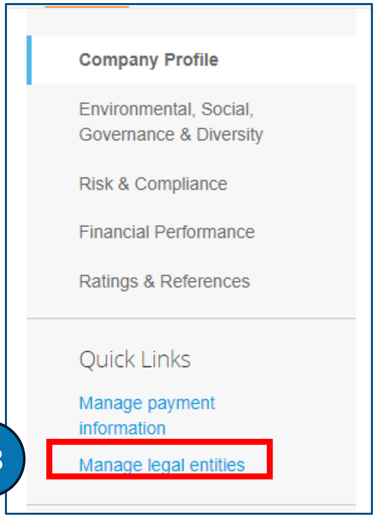
16. Under Areas Served, select the appropriate Region(s)
17. Click on **Save changes** button

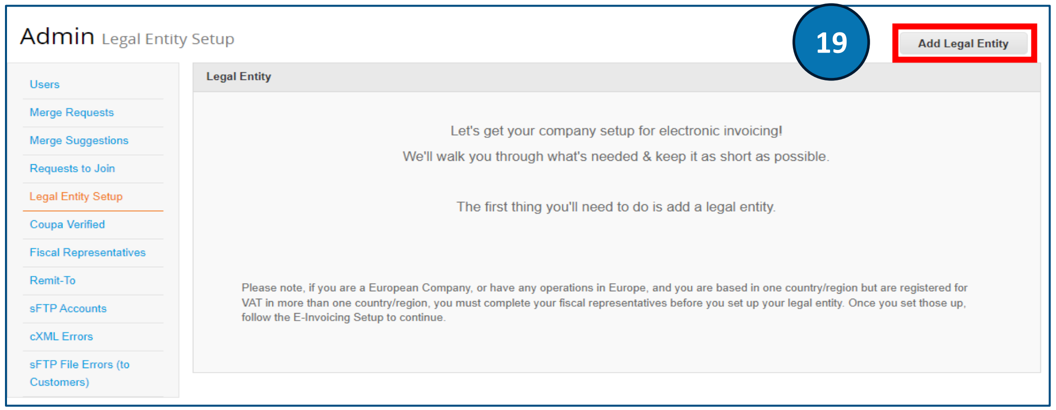


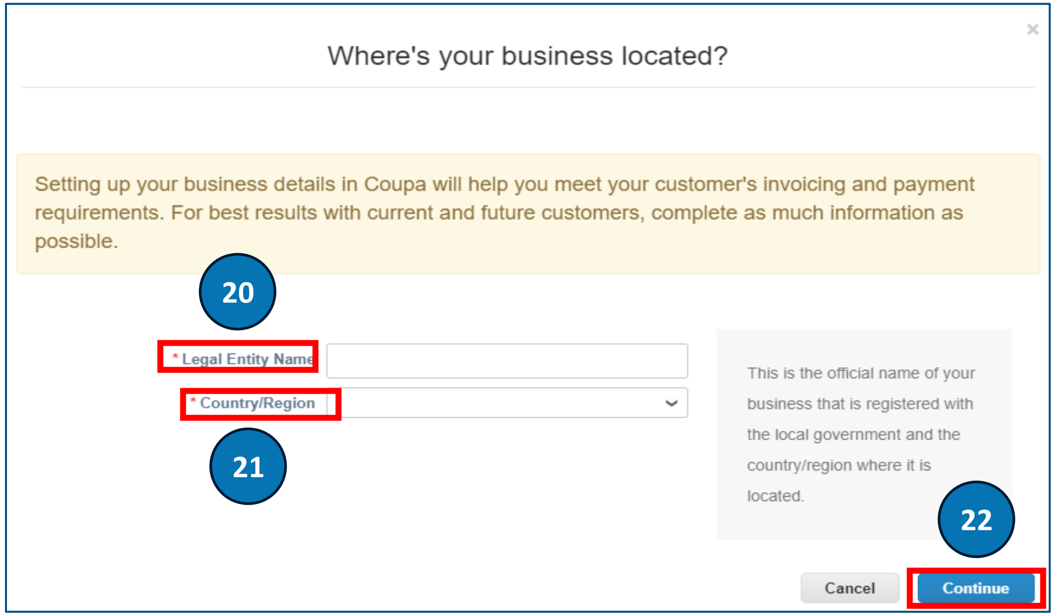


SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

18. Click on **Manage legal entities** hyperlink
19. Click on **Add Legal Entity** button
20. Enter the appropriate **Legal Entity Name** (Mandatory)
21. Select the **Country/Region** from the dropdown list (Mandatory)
22. Click on **Continue** button

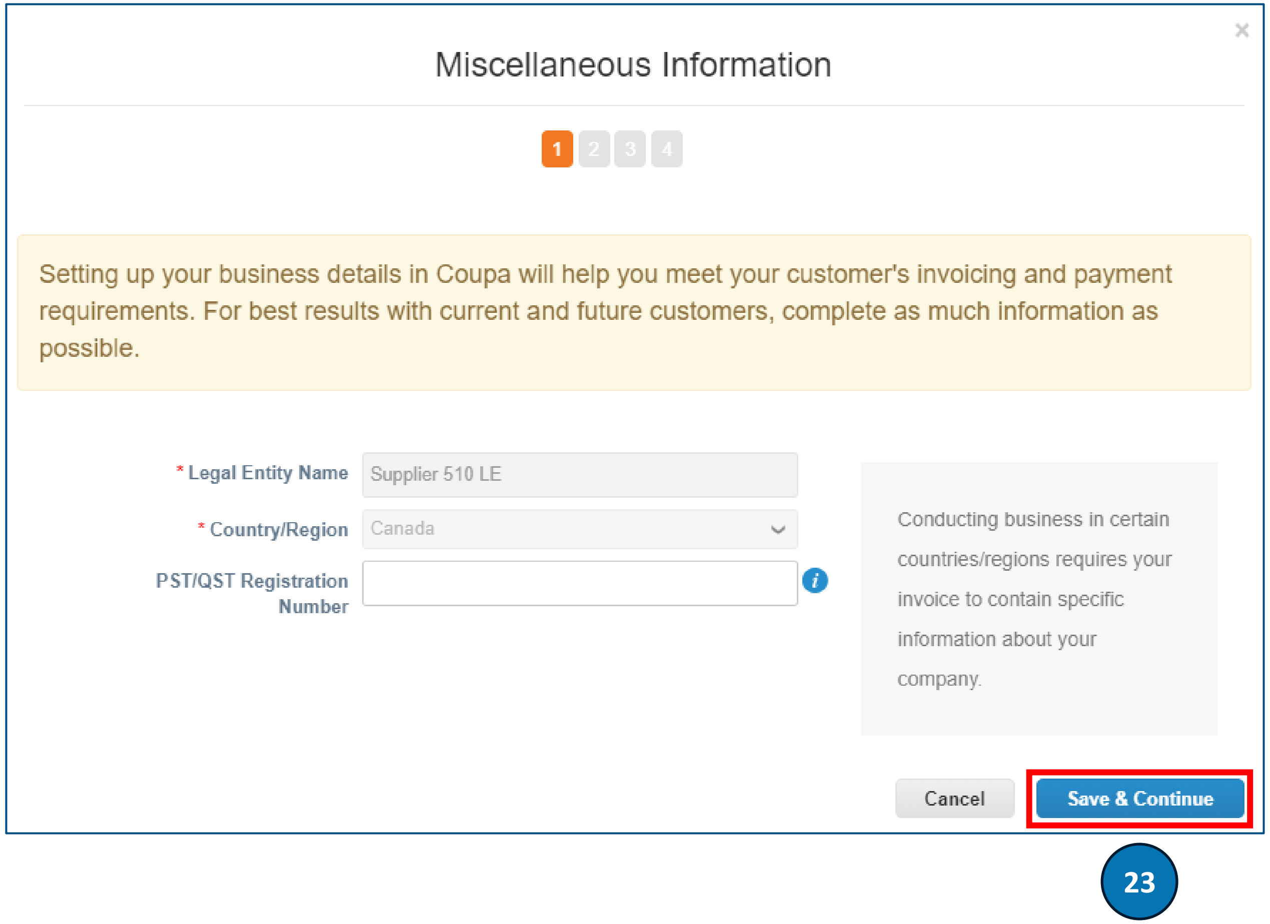






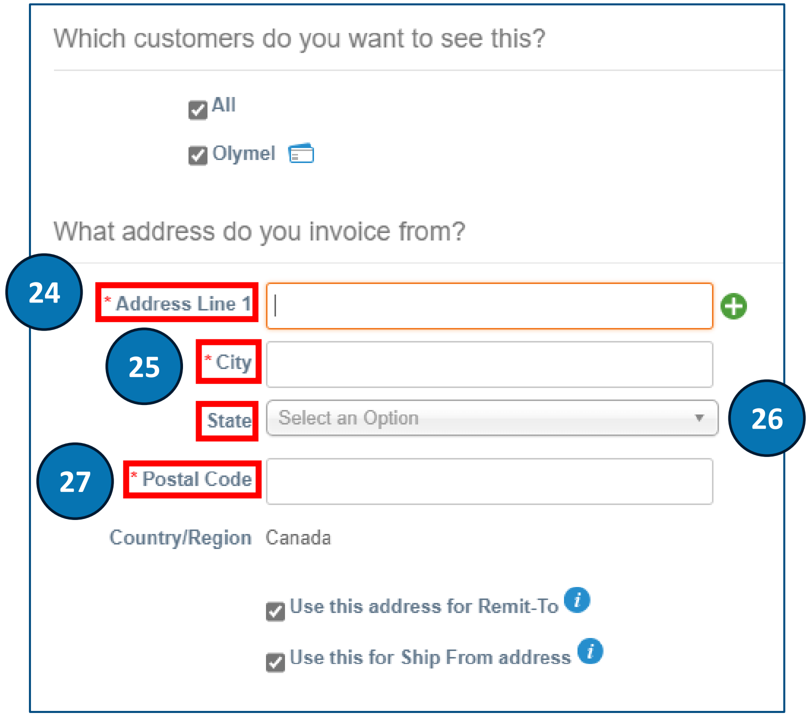
SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

23. Click on **Save & Continue** button



SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

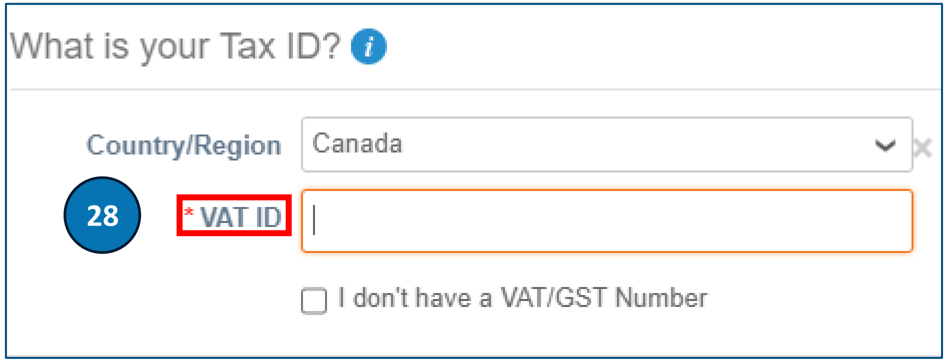
24. Enter the **Address Line 1** field (Mandatory)
25. Enter the **City** (Mandatory)
26. Select the **State** from the dropdown list (Mandatory)
27. Enter the **Postal** Code (Mandatory)

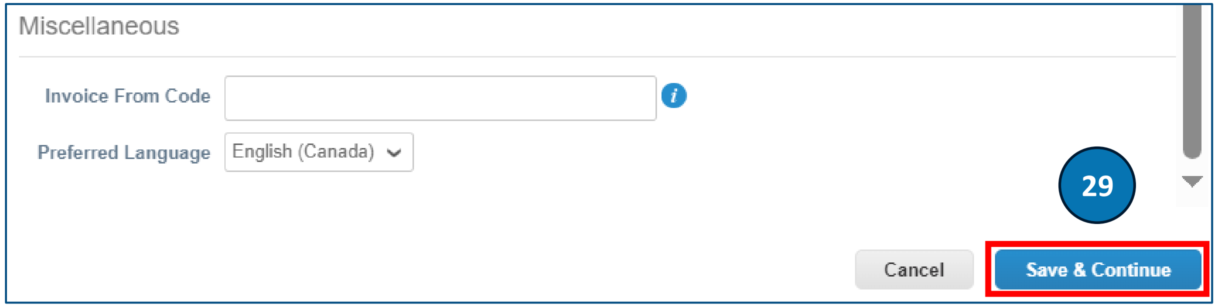


SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

28. Enter the **VAT ID** field or checkmark the checkbox “**I don’t have a VAT/GST Number**” (Mandatory)
29. Click on **Save & Continue** button

Tax IDs will be stored in Olymel’s ERP and the value entered here will not impact payment against invoices submitted



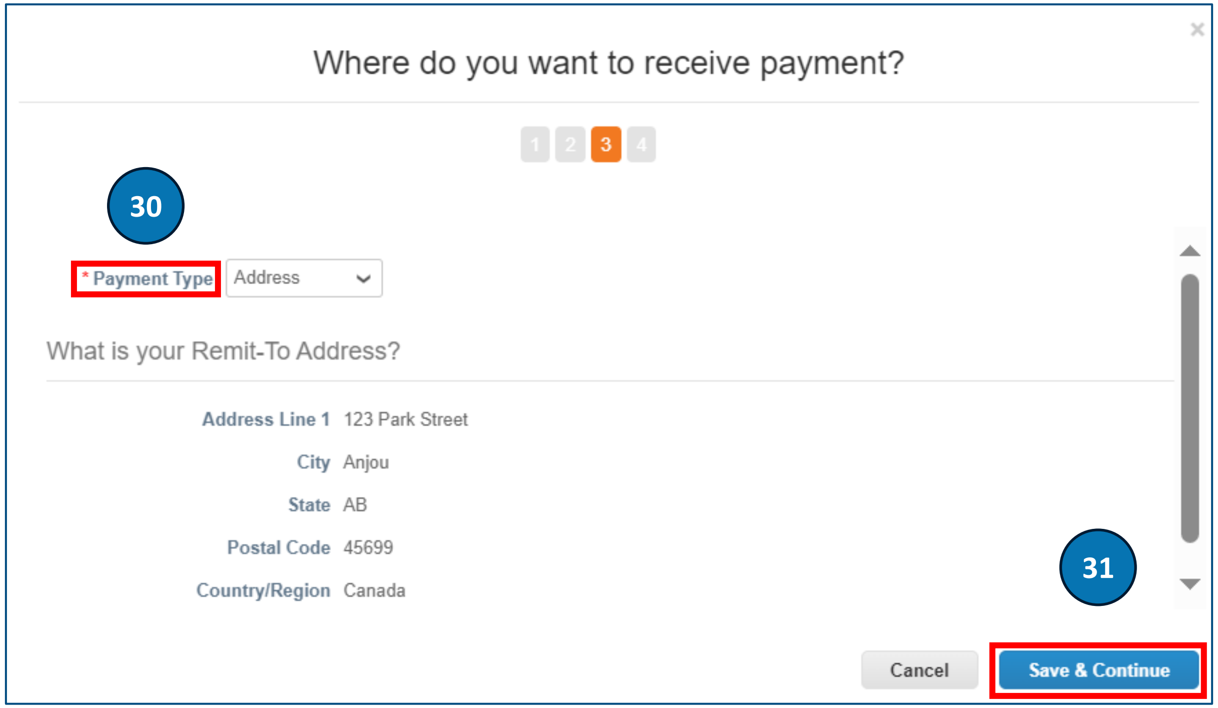


SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

30. Select the **Payment Type** from the dropdown list (We have selected Address) (Mandatory)

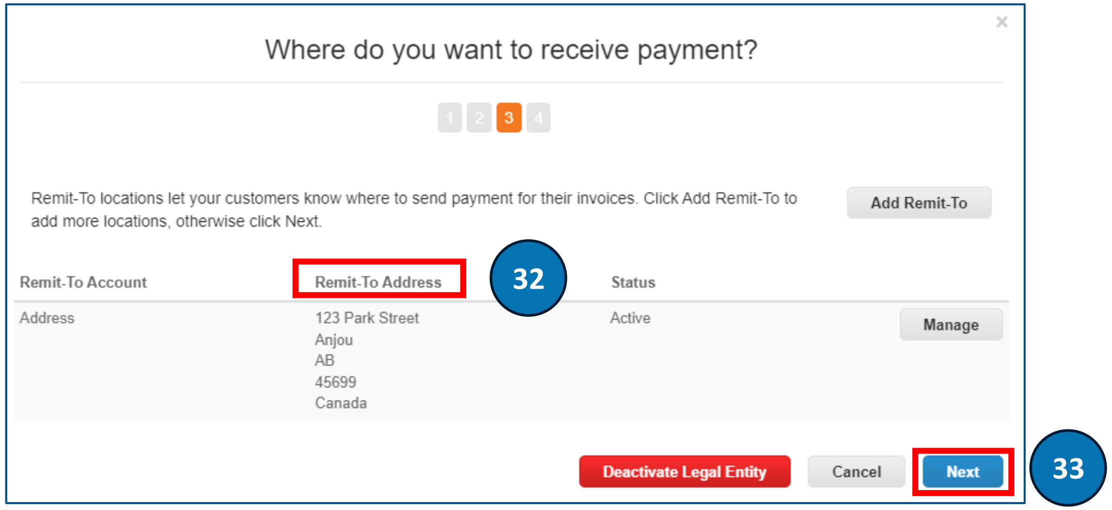
31. Click on **Save & Continue** button

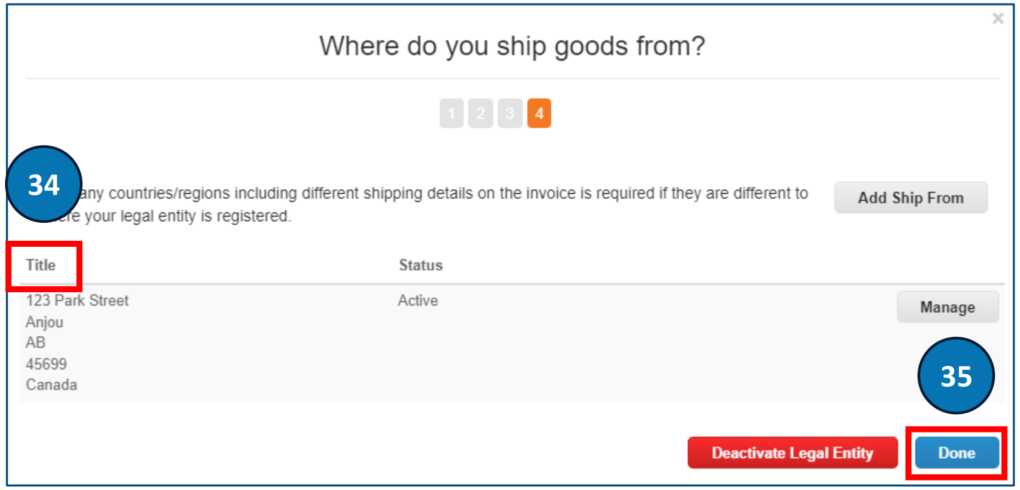
Remittance information will be maintained in Olymel's ERP system and the Remit To Address values entered in CSP will not impact payment against invoices submitted



SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

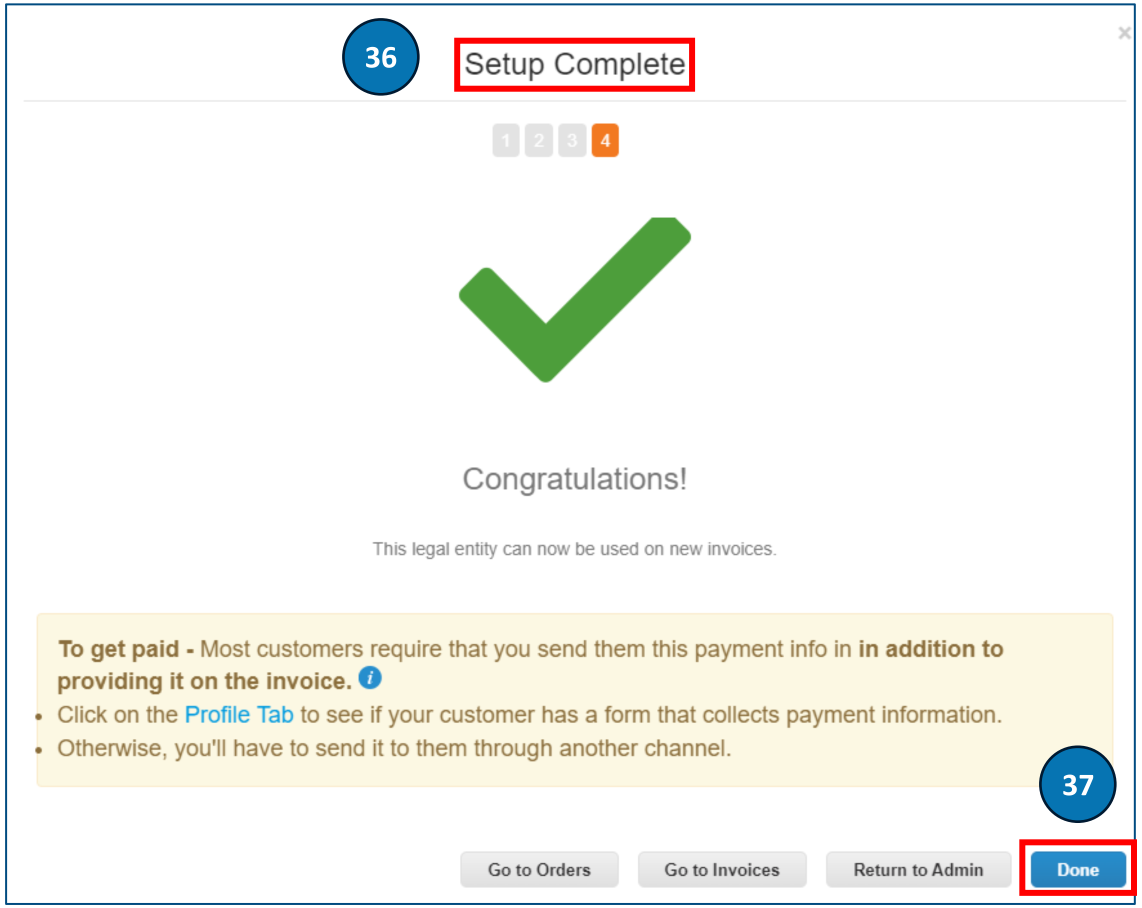
32. Verify the **Remit To Address** details
33. Click on **Next** button
34. Verify the address details
35. Click on **Done** button





SUPPLIER INVITATION AND REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)

36. You will be at the **Setup Complete** page
37. Click on **Done** button

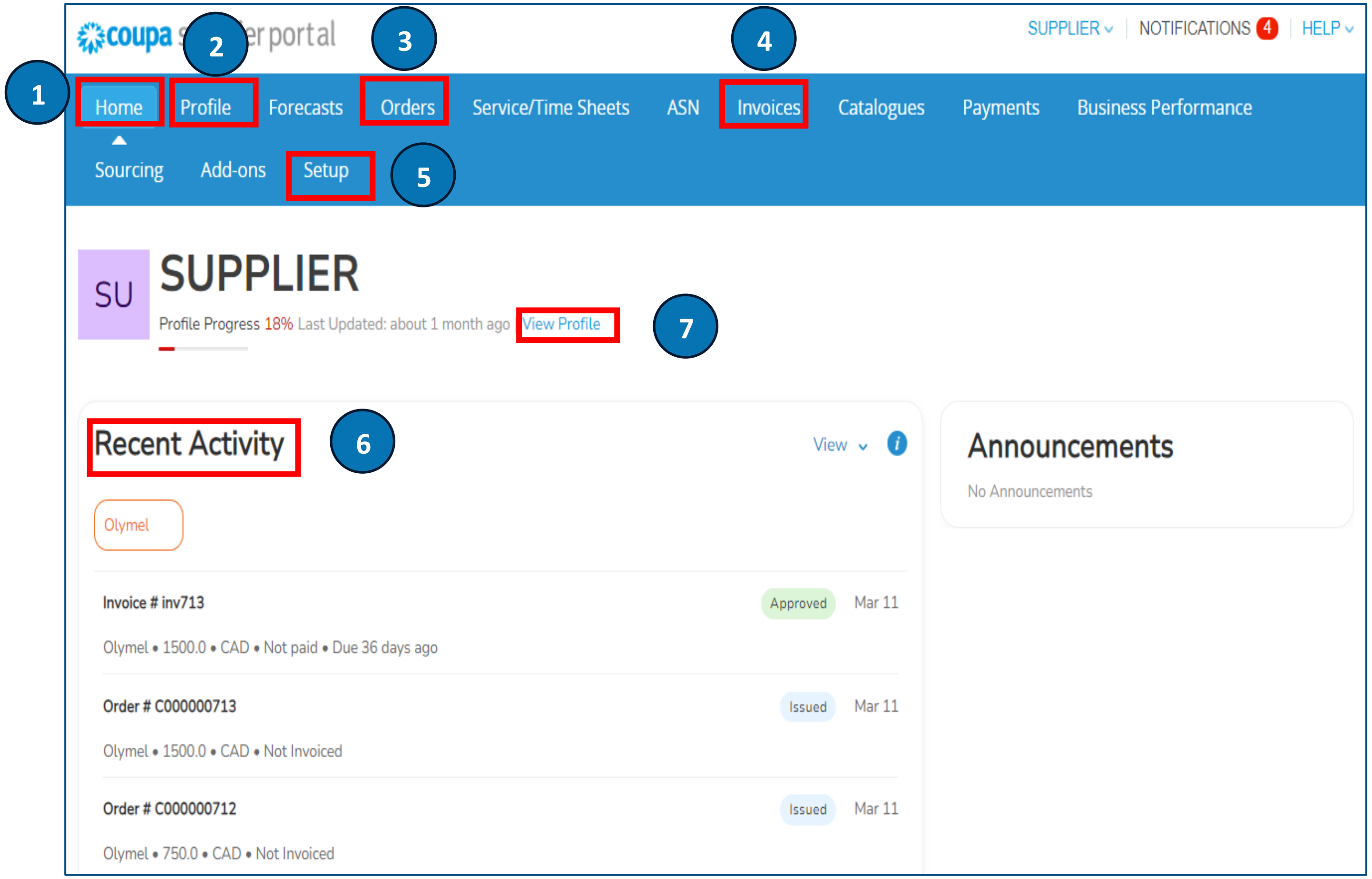


LESSON 2
OVERVIEW OF CSP

CSP HOMEPAGE

Upon logging into CSP, navigate to the homepage to explore the various accessible sections.

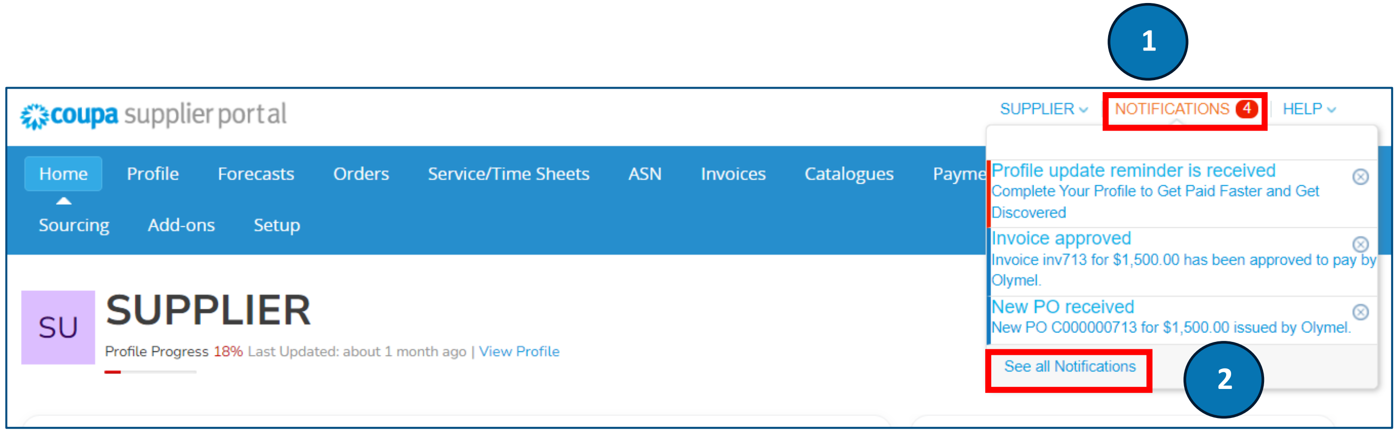
1. The **Home** tab offers you the opportunity to view and enhance your public profile, as well as access the list of customers you are connected with.
2. On the **Profile** provides guidance on how to create and handle your profile, which includes managing **addresses**, **legal entities**, and **contacts**.
3. The **Orders** Tab allows you to view and access the purchase orders
4. The **Invoices** tab provides the ability to create and manage invoices.
5. The **Setup** tab offers options to manage users, remit-to-addresses, and merge requests.
6. The **Recent Activity** section enables you to stay up-to-date with the latest status of your Purchase Orders and Invoices.
7. You can click on **View Profile** hyperlink to view and edit your profile details



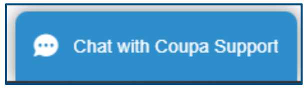
Only the above highlighted sections will be used for Olymel

NOTIFICATIONS

1. Hover your cursor on the **NOTIFICATIONS** section
2. Click on **See all Notifications** hyperlink. You will be able to view all notifications sent to you as well as manage your notification preferences from this page



Please use the Chat with Coupa Support option for any technical support



LESSON 3

USER MANAGEMENT
(SUPPLIER SETTINGS)

USER MANAGEMENT – INVITING A NEW USER

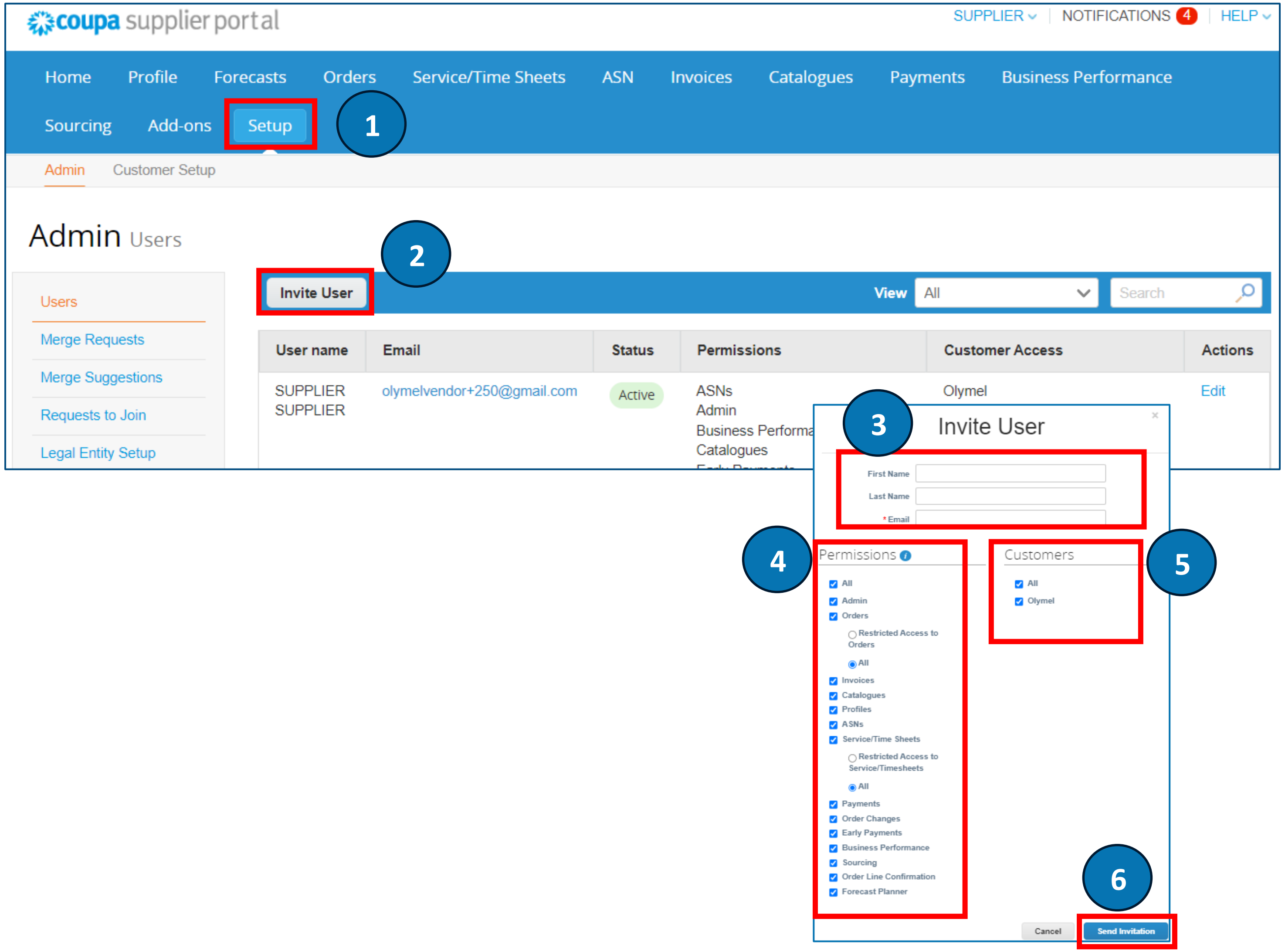
The supplier portal allows you to invite more users within your organization to join the CSP.

1. To invite users to your CSP account, click on the **Setup** tab
2. To invite a new user, go to the **Users** section and click on the "**Invite User**" button.

A new windows pops up

3. Enter the user's information (**Name and email address**) (Mandatory)
4. Then, select which **permissions** the user should be able to **access** (in this case **permissions** mean "**modules access**")
5. Select which **customers** the user should be able to access.
6. Click on **Send Invitation**. The employee receives an email notification right away, with a link to register.

The new user will appear only once they accepted the invitation



USER MANAGEMENT – MANAGING EXISTING USER

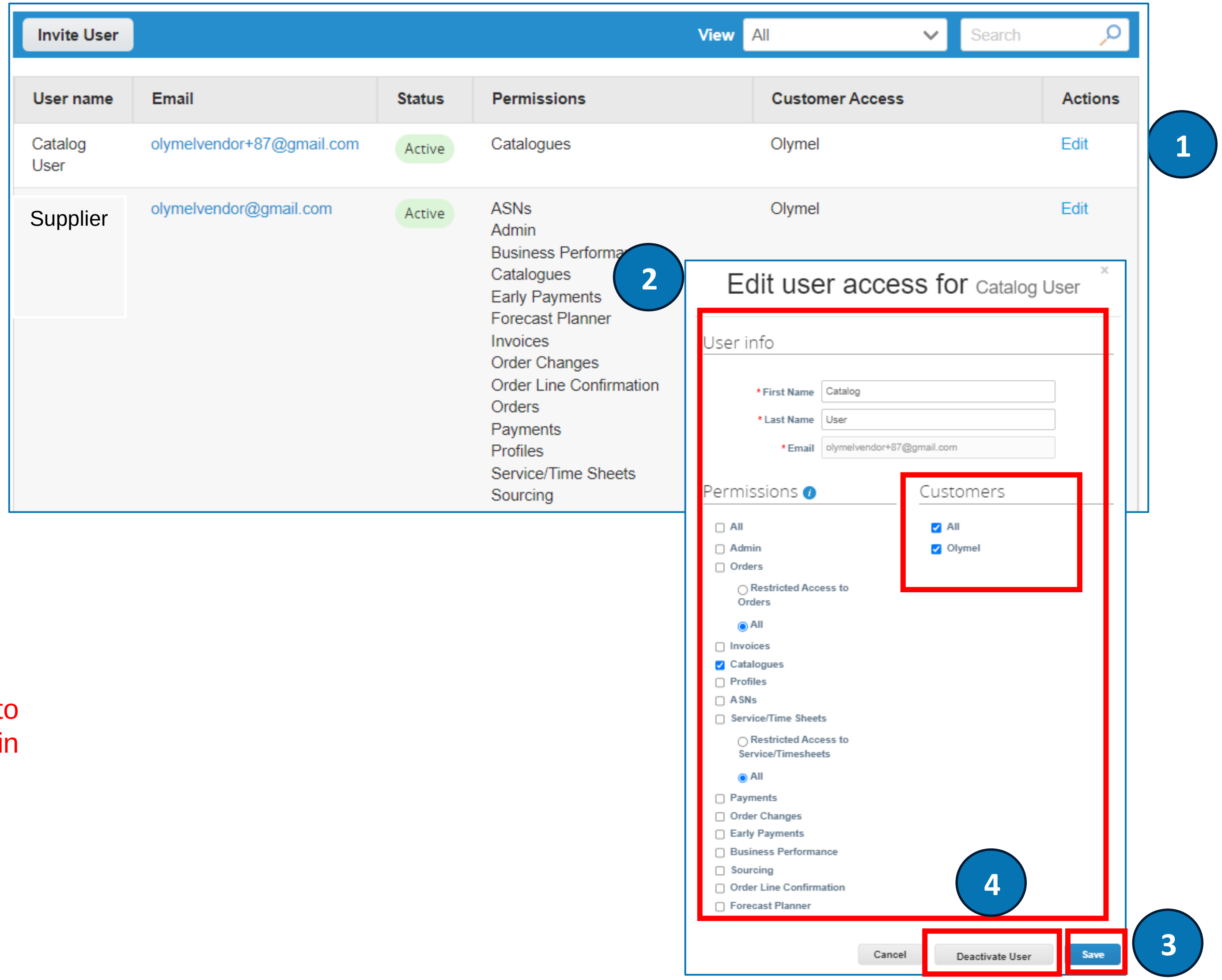
Management of existing users takes place in the same module (**Setup > Users**).

1. If you need to manage users, simply click on "**Edit**" to access the user management options.

A new windows pops up

2. By accessing user management, you can edit **user information**, change the **permissions** granted to them, and modify the **customers** they are linked to.
3. Remember to click on "**Save**" to apply any changes you have made.
4. If needed, you can **deactivate** a specific user by selecting **Deactivate User**.

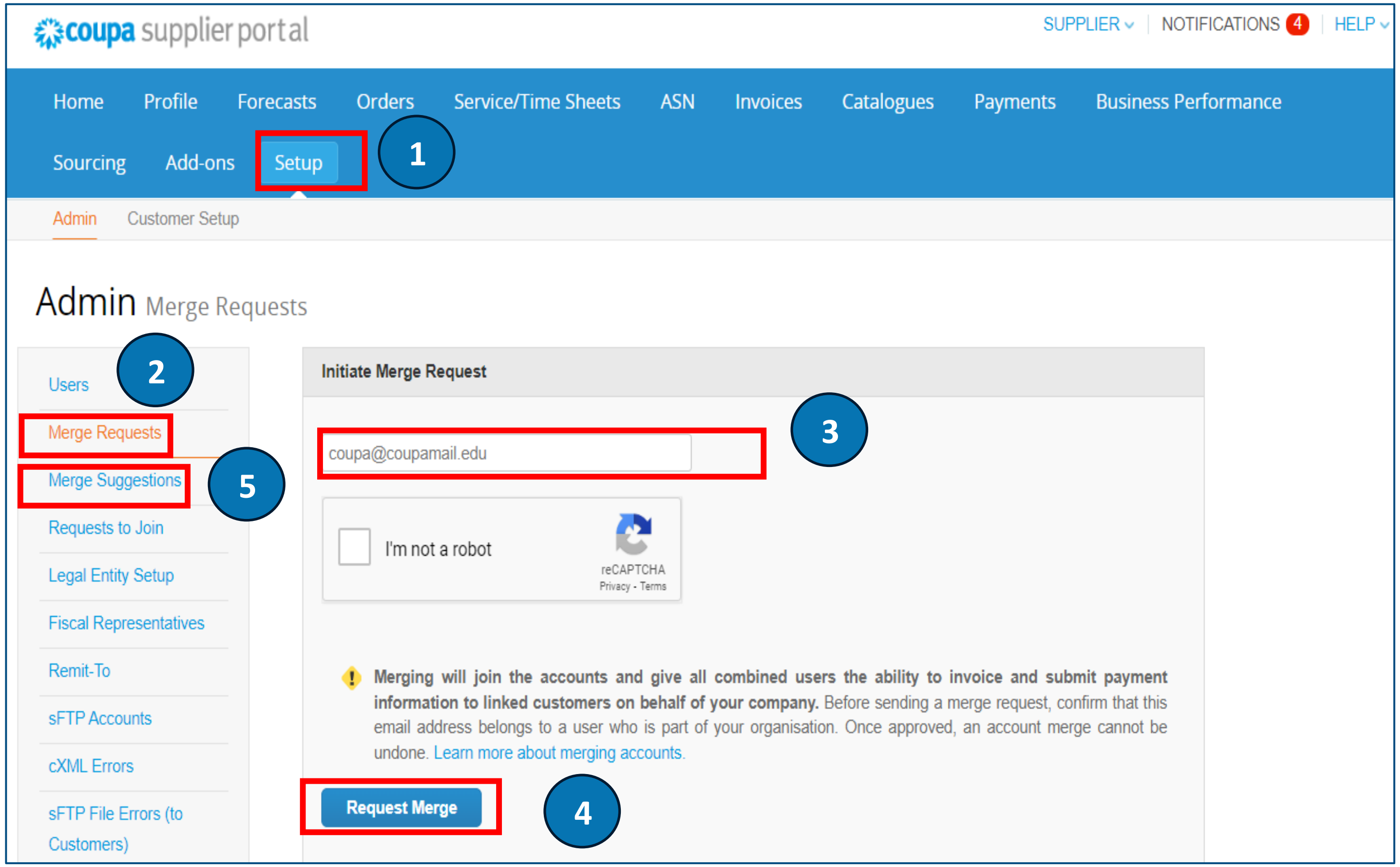
Please note that the system requires a minimum of 2 active users to be able to deactivate one of them. Also, if there is only one user in the CSP, it cannot be deactivated.



USER MANAGEMENT - MERGE REQUESTS

It is possible for your company to have multiple accounts/profiles in the CSP, especially if multiple users from your company registered or were invited with different email addresses.

1. Click on **Setup** section for Merge Request if your company have more than one account/profile in the CSP
2. Click on **Merge Requests** hyperlink
3. Enter the email id you want to merge
4. Click on **Request Merge** button
5. Please note that account **Merge Suggestions** are based on the email domain. In other words, the system automatically suggests merging all users with a particular email domain, such as @example.com



Once an account is merged it cannot be unmerged

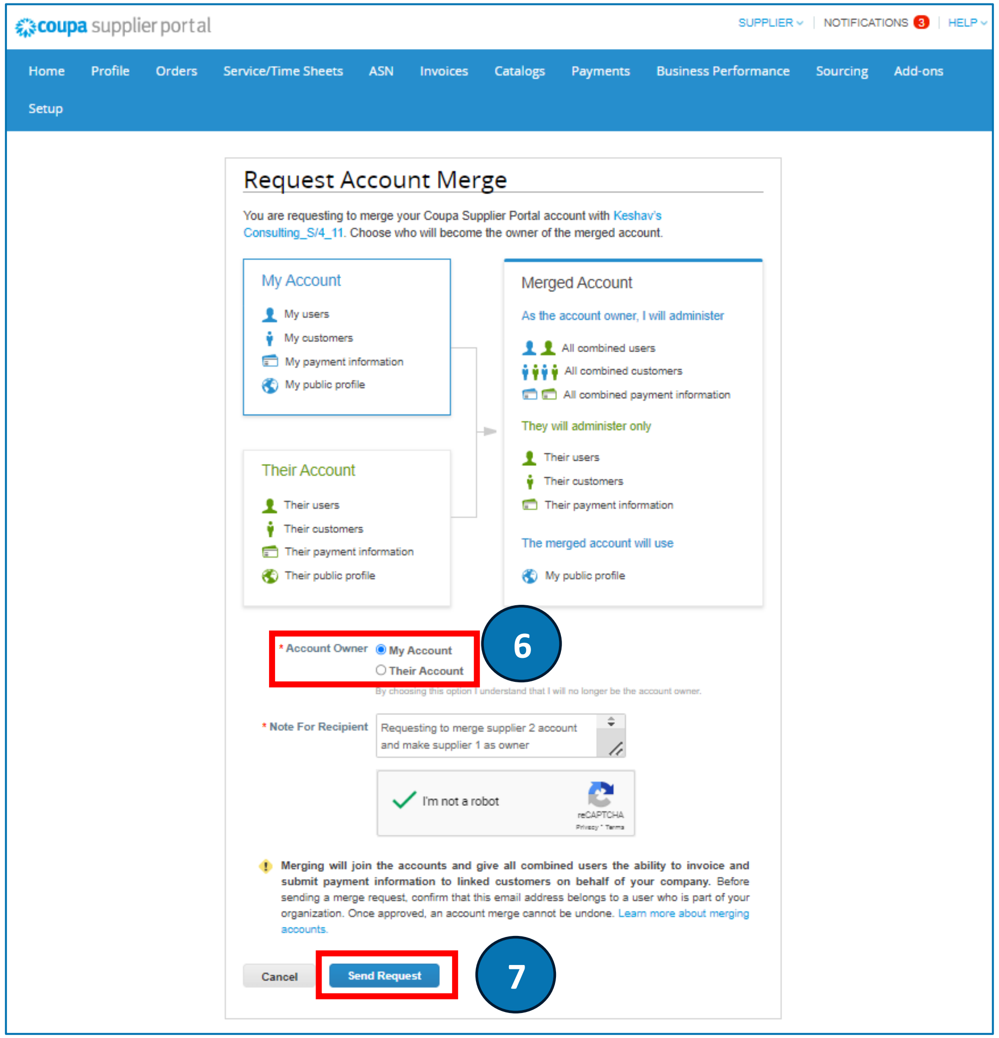
Note that accounts with the same email address will be merged automatically, regardless of which invite message was used to create the account, as long as both invites were sent to the same email address.

USER MANAGEMENT - MERGE REQUESTS

6. To select an account as the parent account, go to the **Account Owner** section and choose the account you want to use. Then, add a note to the account. (Mandatory)

7. Click on **Send Request**

Merge request will be sent to the other supplier citing the owner once the accounts are merged

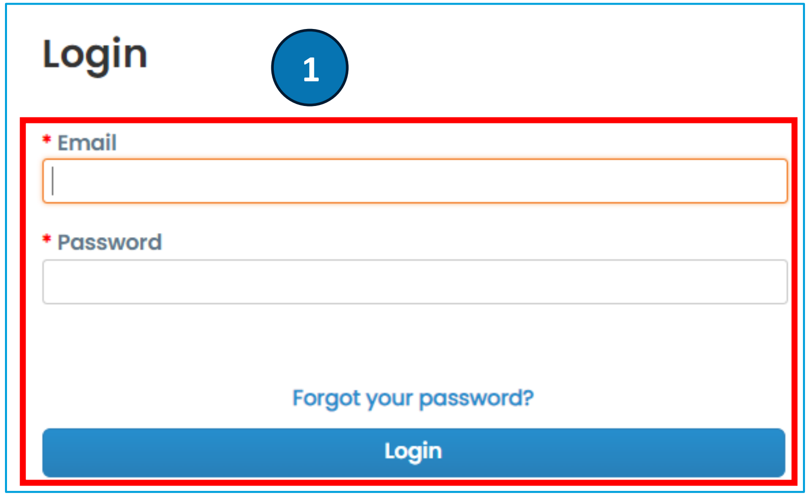


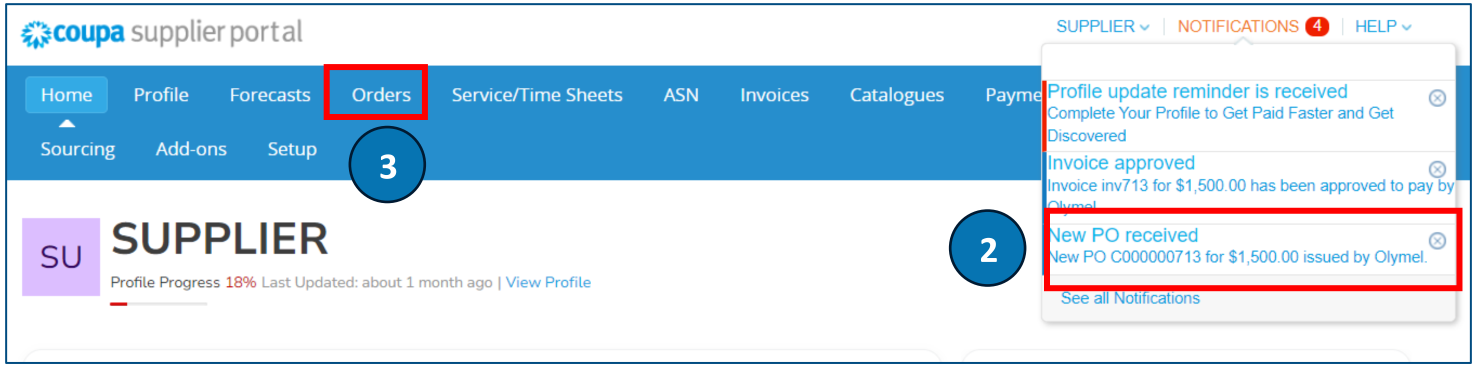
LESSON 4
VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)

VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)

In order to access the purchase order(PO), log in the **CSP** by following the below mentioned steps

1. Enter your **Email** and **Password** and click on **Login** button (Mandatory)
2. By clicking on the notification under **NOTIFICATIONS** section, you will directly land on the order to **review** and **acknowledge** it
3. You can also access all Orders by clicking on the **Orders** tab.

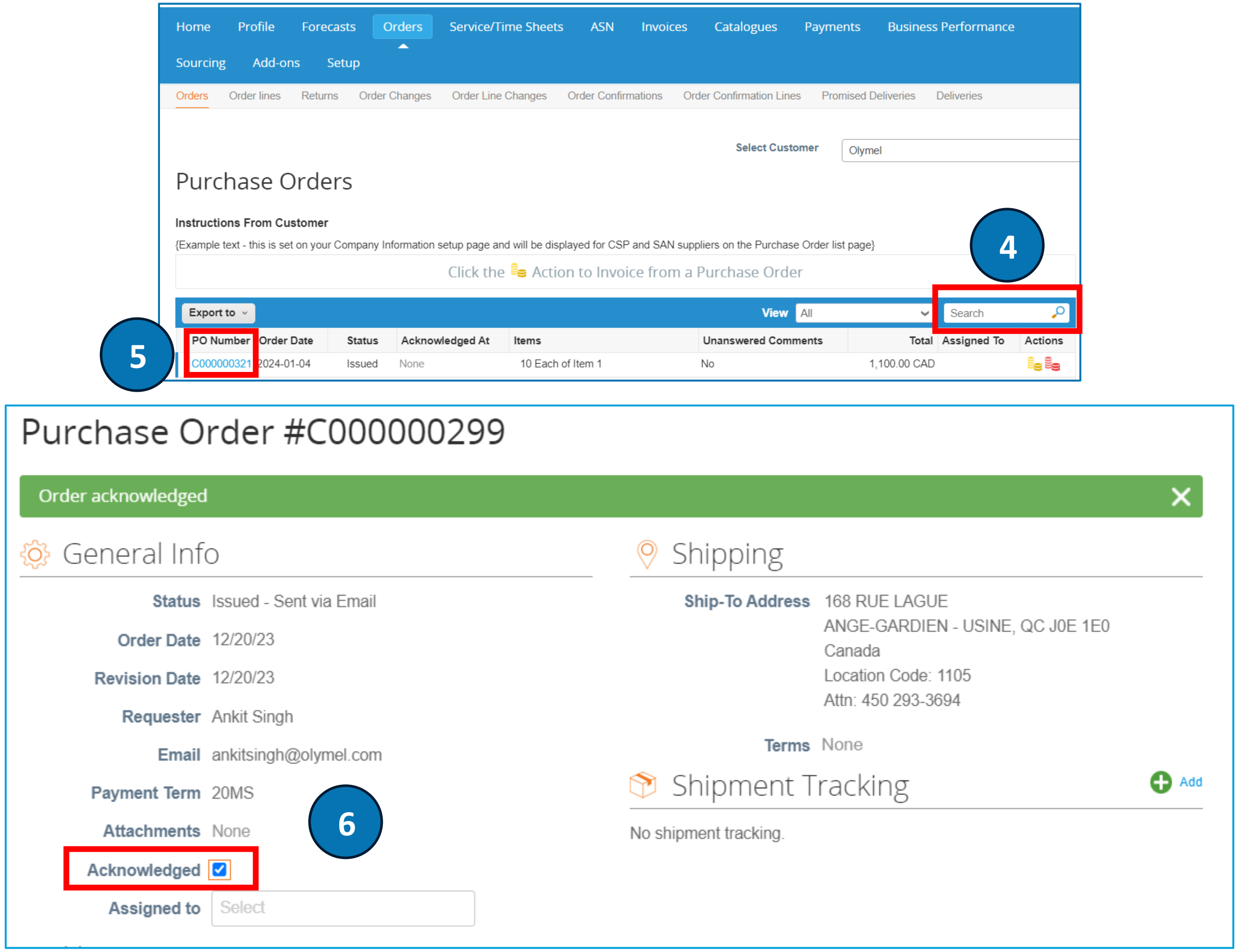




VIEW AND ACKNOWLEDGE A PURCHASE ORDER (CSP)

4. Search for the right order by entering the **PO#** in the **Search** field
5. Click on the **PO number** to view the PO
6. Acknowledge the purchase order by checking the checkbox next to **Acknowledged** field

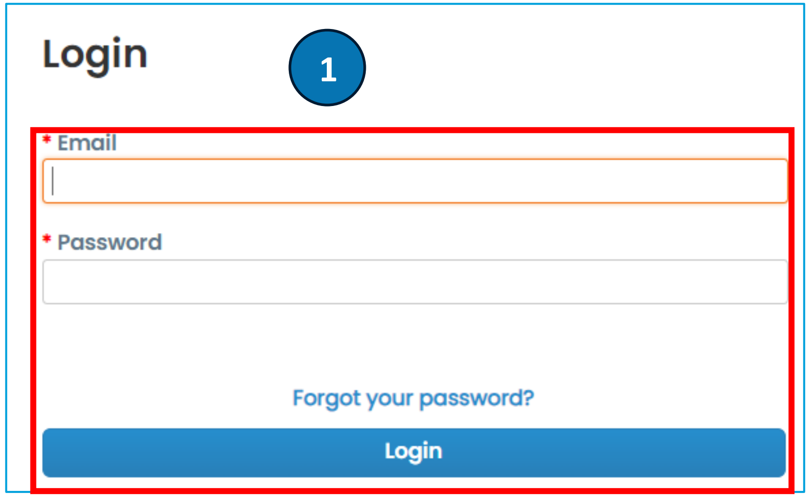
Order Acknowledgement only means a confirmation that a Supplier has received the Order

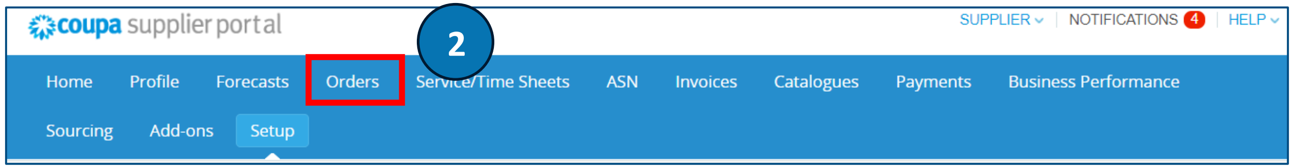


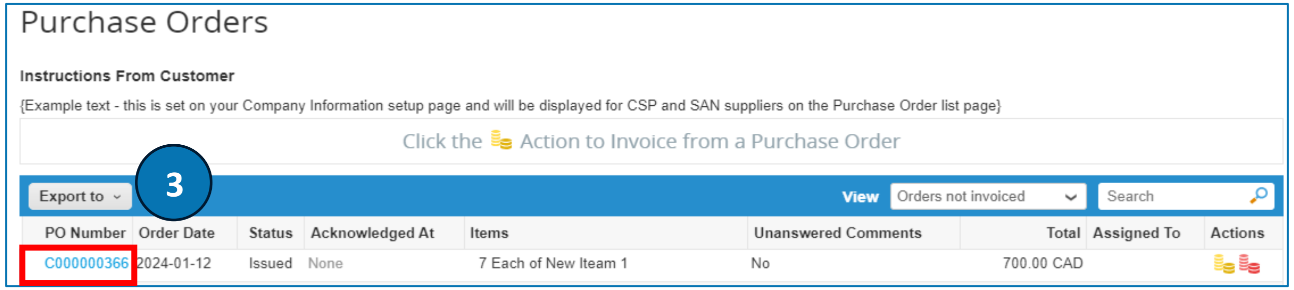
PAYMENT AGREEMENT ON PURCHASE ORDER

Below are the steps to view a Payment Agreement on a Purchase Order

1. Enter your **Email** and **Password** and click on **Login** button (Mandatory)
2. Click on the **Orders** section
3. Click on the **PO Number** hyperlink to view the purchase order







PAYMENT AGREEMENT ON PURCHASE ORDER

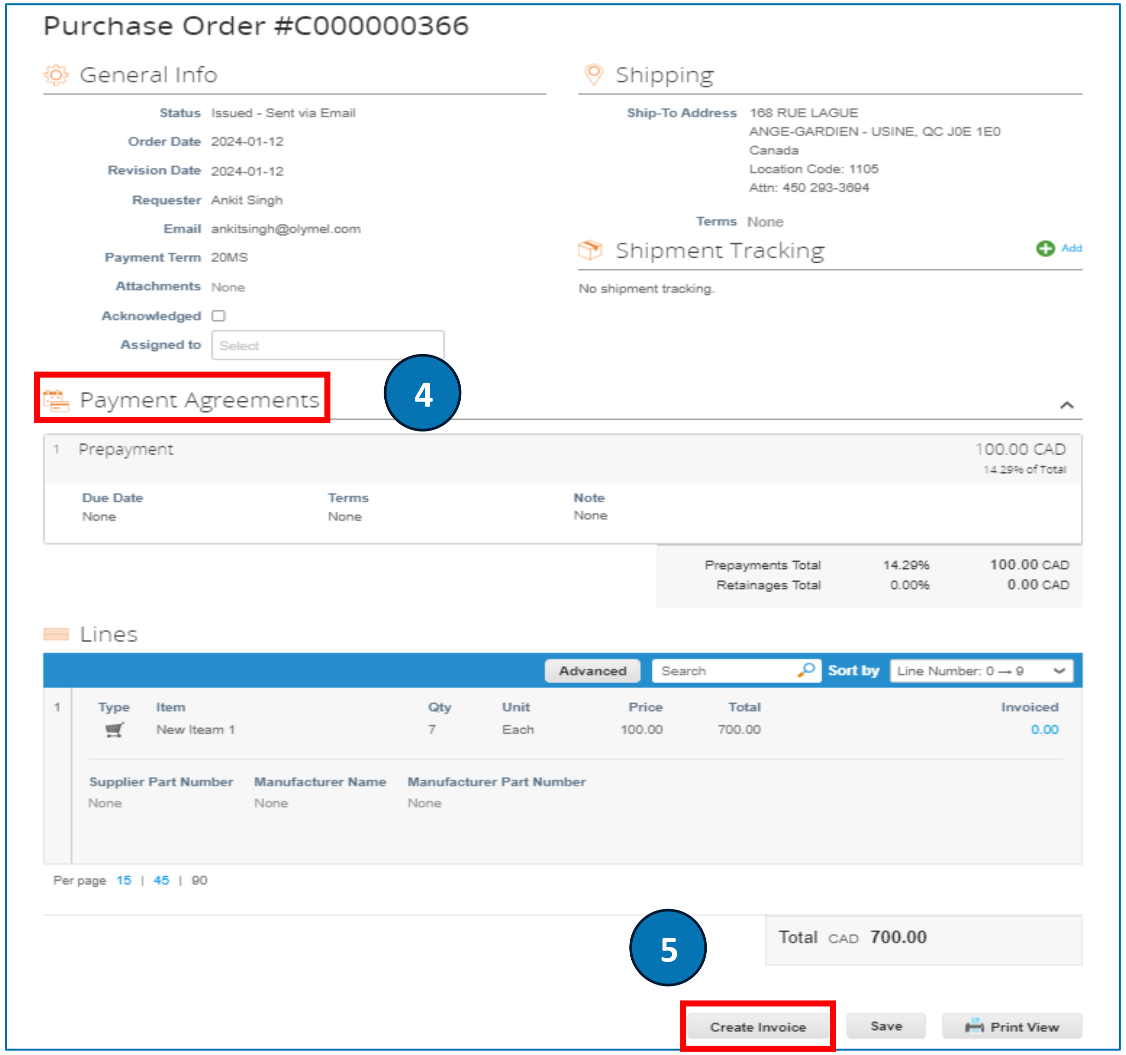
4. You will be able to view the Payment Agreements details on the purchase order

5. Click on the **Create Invoice** button*

6. Please follow the steps shown in lesson 5 to create an invoice

* When there is a Payment Agreement on a purchase order, irrespective of the amount, always invoice in full, when the service is fully delivered, otherwise the invoice will be rejected and disputed.

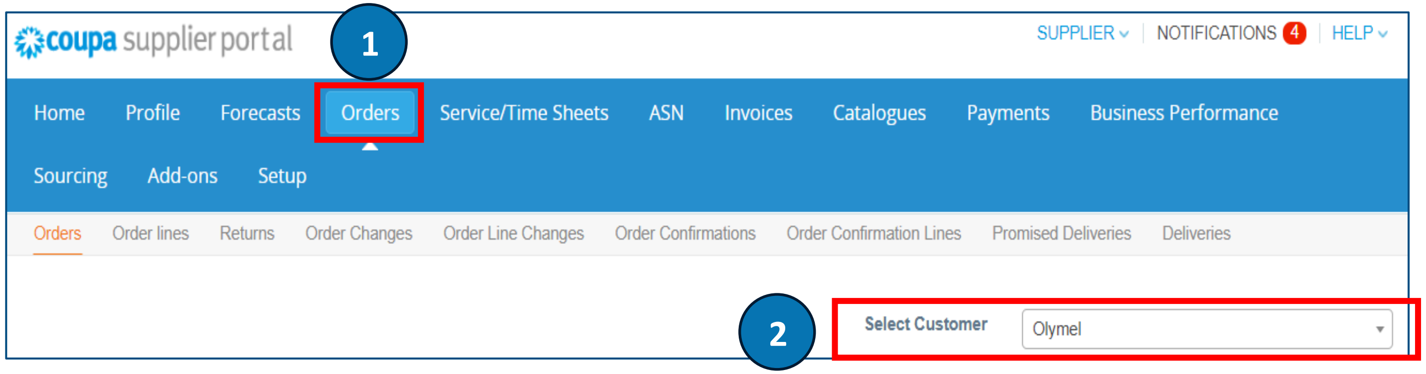
*A dispute process will be initiated if an adjusted invoice is sent

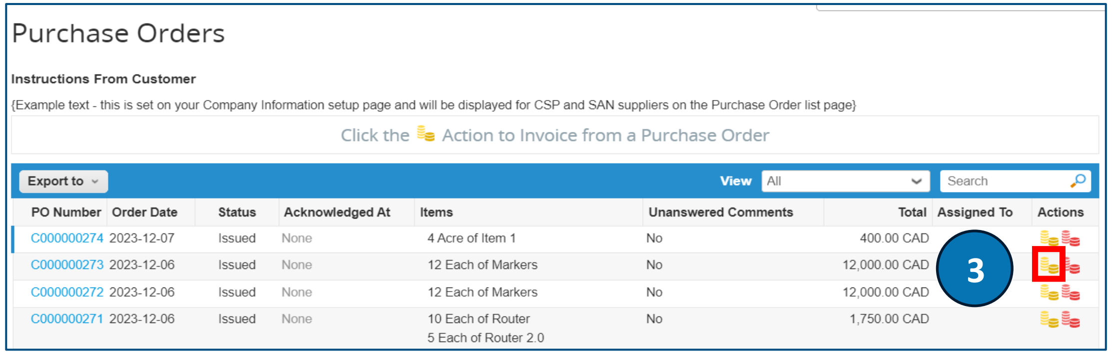


LESSON 5
CREATE AND MANAGE INVOICE

CREATE INVOICE FROM PO

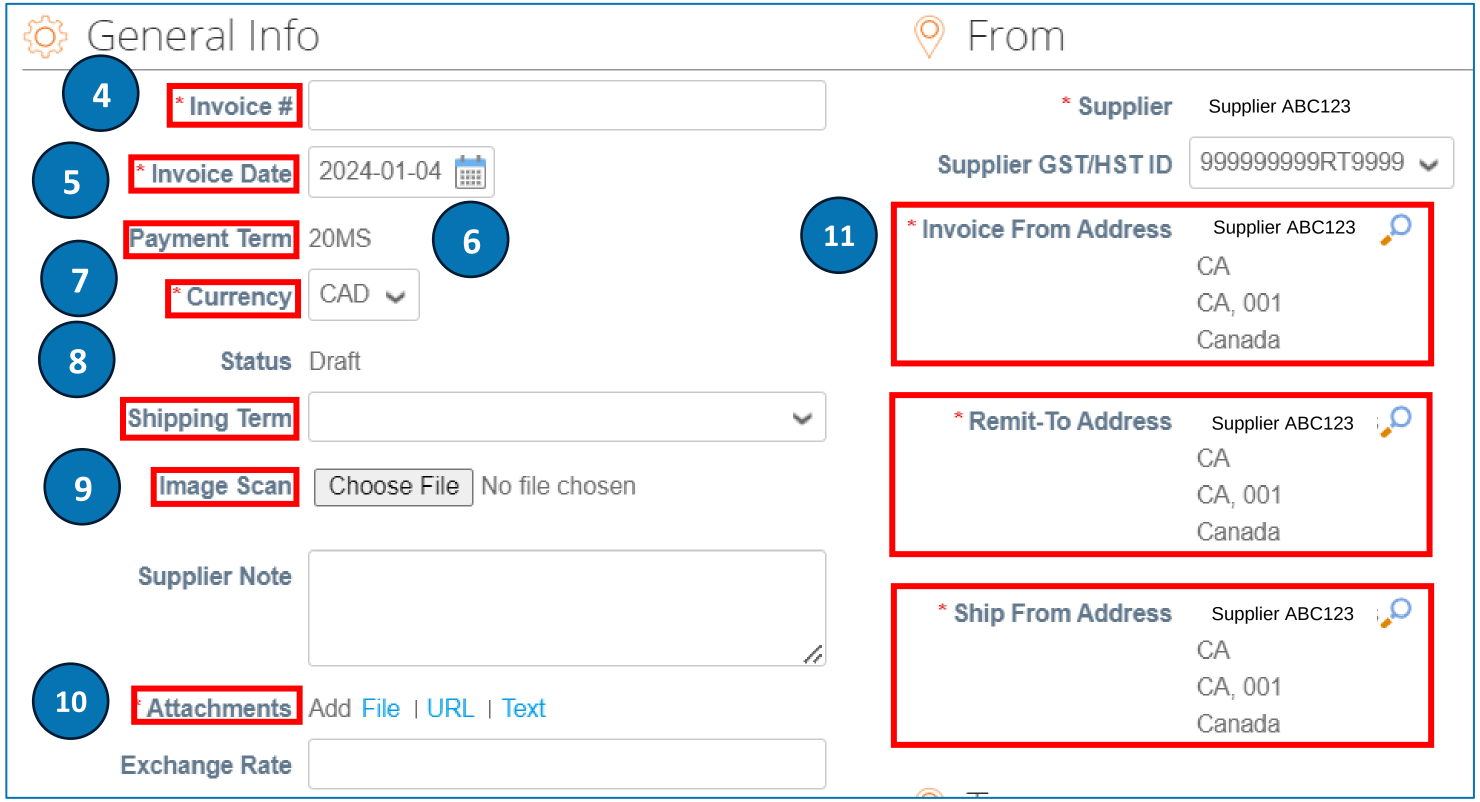
1. To Create invoices based on PO, click on **Orders** section
2. The **Select Customer** field will show you the list of your customers. Select Olymel from the dropdown list (This is an optional step in case you are catering to multiple customers via CSP)
3. To flip a PO into an Invoice, simply click on the yellow stack of coins create invoice icon ( )





CREATE INVOICE FROM PO

4. For **Invoice #** field, enter the invoice number (Mandatory)
5. Enter the **Invoice Date** (Mandatory)
6. **Payment Term** gets defaulted from the PO (Mandatory)
7. **Currency** gets defaulted from the PO
8. **Shipping Term** gets defaulted from the PO
9. For **Image Scan** field, upload the legal invoice copy supporting documents (Mandatory)
10. Please upload the supporting documents in the **Attachments** field
11. Click on the **magnifying glass icon** to select the address for **Invoice From Address**, **Remit-To Address** and **Ship From Address** fields (Mandatory)



Please note that the Remit To Address entered here will not impact the payments made to invoices

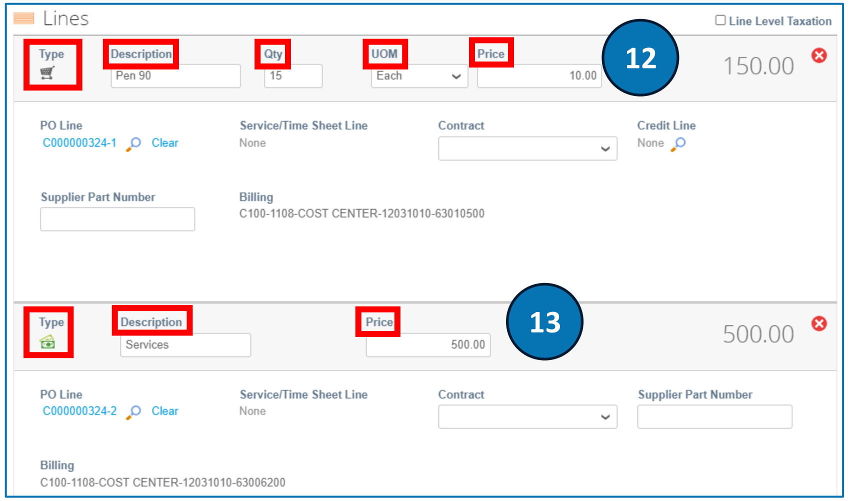
If the Currency and Shipping Term fields get defaulted, please do not change the values

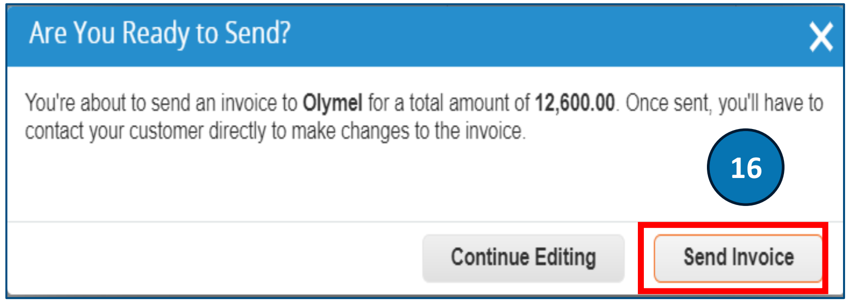
Invoice number cannot contain more than 16 characters otherwise this will lead to an integration error

CREATE INVOICE FROM PO

12. Under Lines section, for **Type** Qty you have the option to update the **Description**, **Qty**, **UOM** and **Price** field as applicable
13. For **Type** Amt, you have the option to update the **Description** and **Price** fields as applicable
14. To add **Header Level** taxes, please refer to lesson 6
15. To add **Line Level** taxes, please refer to lesson 7
16. At the pop-up, click on **Send Invoice** button
17. You will see a message stating "**invoice is pending approval**"

Please select the Type as Qty for quantity based lines. For amount based lines, please select the Type as Amt

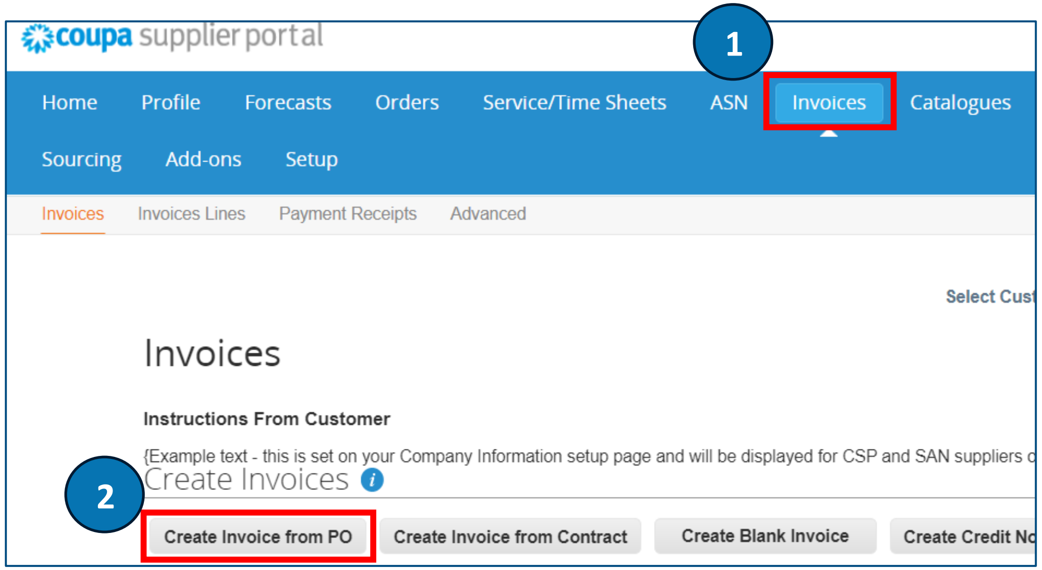


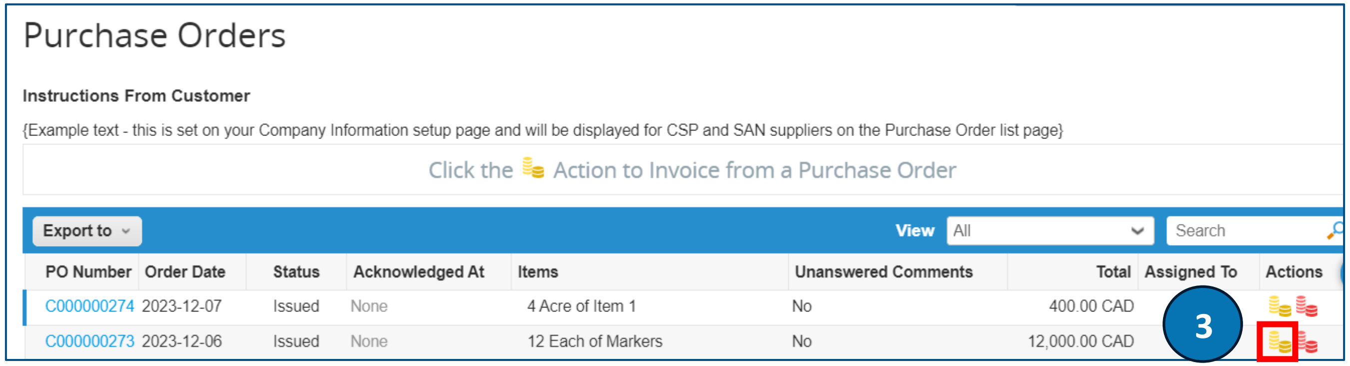


CREATE INVOICE FROM PO – INVOICE

Here we will see another way to create invoices from PO

1. Click on **Invoices** section
2. Click on the **Create Invoice from PO** button.
3. You can click on **Create Invoice** button
4. Follow the steps mentioned in lesson 5





LESSON 6

INVOICE CREATION VIA CSP(HEADER LEVEL TAXATION)

INVOICE CREATION VIA CSP (HEADER LEVEL TAXATION)

You can enter **Header Level Taxes** by following the mentioned steps

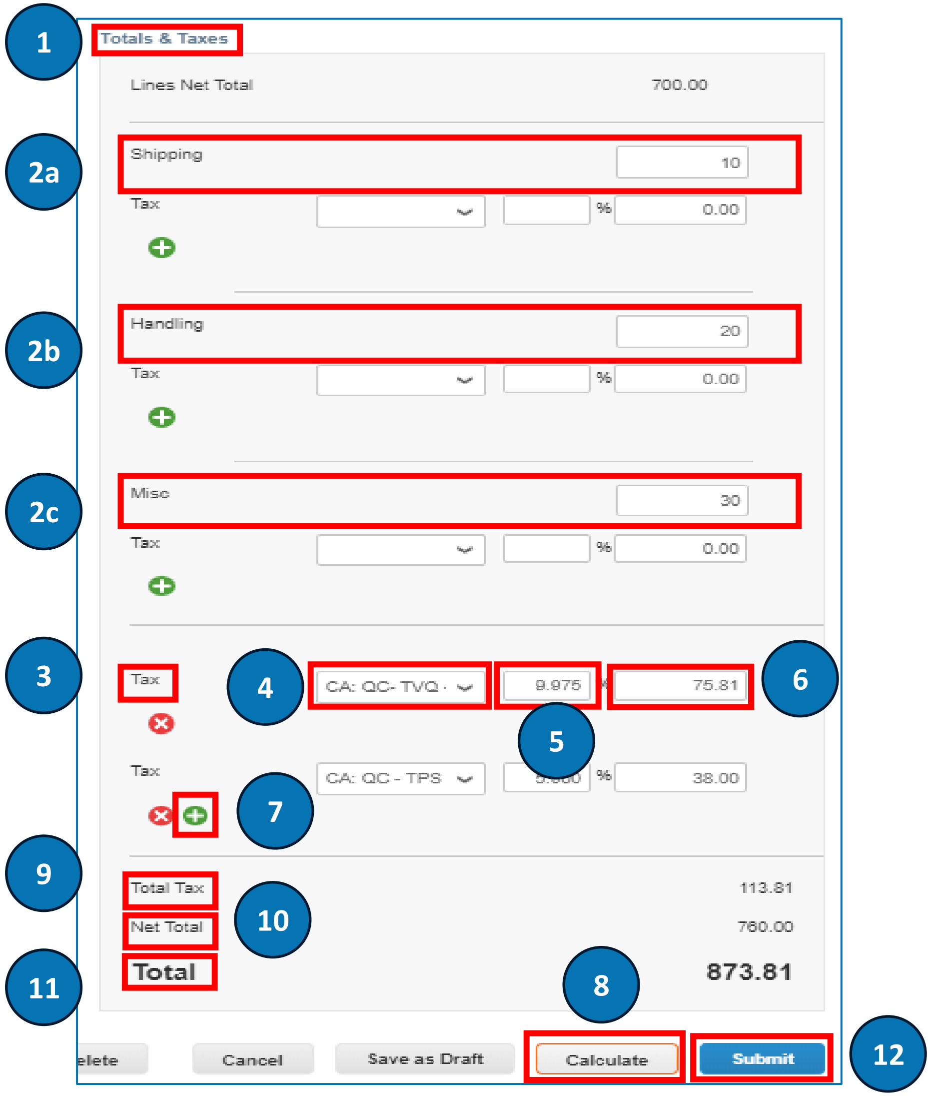
1. Scroll down to the **Totals & Taxes** section of the invoice
2. Enter the **Shipping (2a)** , **Handling (2b)** and **Misc (2c)** charges if applicable
3. To enter tax at **Invoice Header**, choose the tax code from the dropdown list of **Tax** field
4. For e.g. to enter tax for Québec, select the tax code as **CA: QC – TPS – GST – 5.0%** and **CA: QC – TVQ – QST – 9.975%** from the dropdown list
5. **Tax Rate** will get defaulted from the tax code chosen
6. **Tax Amount** gets auto calculated based on the tax code chosen
7. Click on the **green '+'** icon to enter the second tax line if required
8. Click on **Calculate** to obtain the recalculated invoice amount.
9. The **Total Tax** field will display the total tax calculated on the invoice
10. The **Net Total** field will display the Line and summary charges total
11. The **Total** field will display the cumulative sum of Total Tax and Net Total
12. Click on **Submit** button to submit the invoice created

Please do not modify the Tax Rate and Tax Amount details

You will not be allowed to enter Line level and Header level taxes together on an invoice

Tax codes entered at header level will calculate tax on the entire invoice including line total and summary charge total

Please do not enter taxes in the shipping, handling and misc tax fields for header level taxation



LESSON 7

INVOICE CREATION VIA CSP(LINE LEVEL TAXATION)

INVOICE CREATION VIA CSP (LINE LEVEL TAXATION)

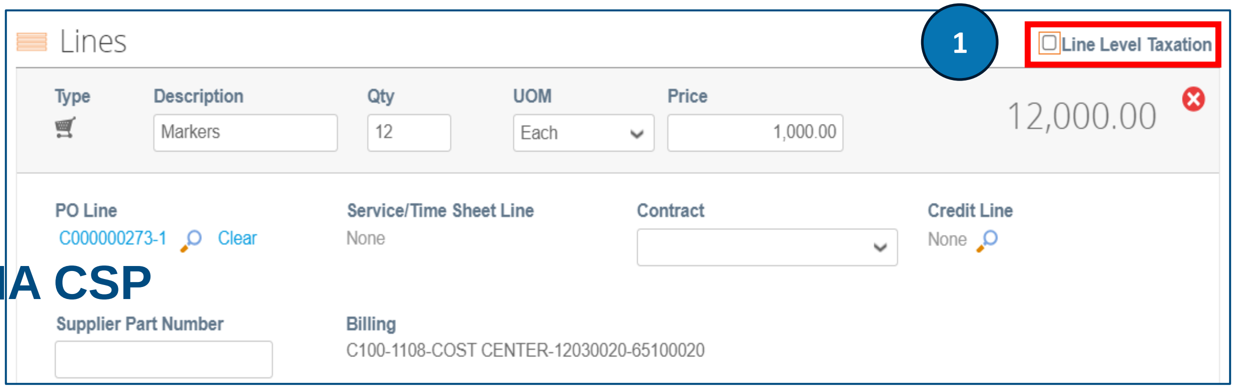
You can enter **Line Level Taxes** by following the mentioned steps

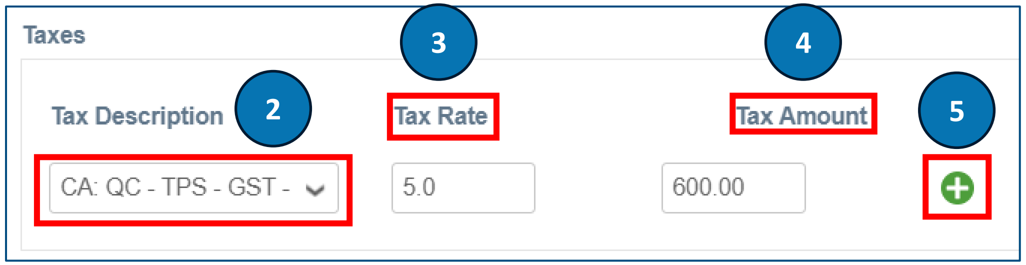
1. If there a multiple lines in the PO and you want to put line level taxes, checkmark the **Line Level Taxation** checkbox
2. To enter tax for Québec, select the **Tax Description** as **CA: QC – TPS – GST – 5.0%** from the dropdown list
3. **Tax Rate** gets defaulted based on the tax code chosen in Tax Description field
4. **Tax Amount** gets auto calculated based on the tax code and tax rate
5. Click on the green '+' icon to enter the second tax line if required
6. To enter tax for Québec, select the tax description as **CA: QC – TVQ – QST – 9.975%** from the dropdown list

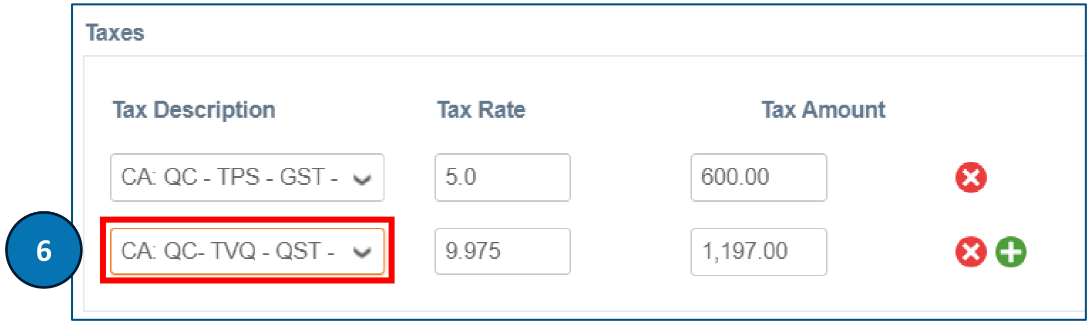
Please do not modify the Tax Rate and Tax Amount details

You will not be allowed to enter Line level and Header level taxes together on an invoice

INVOICE CREATION VIA CSP



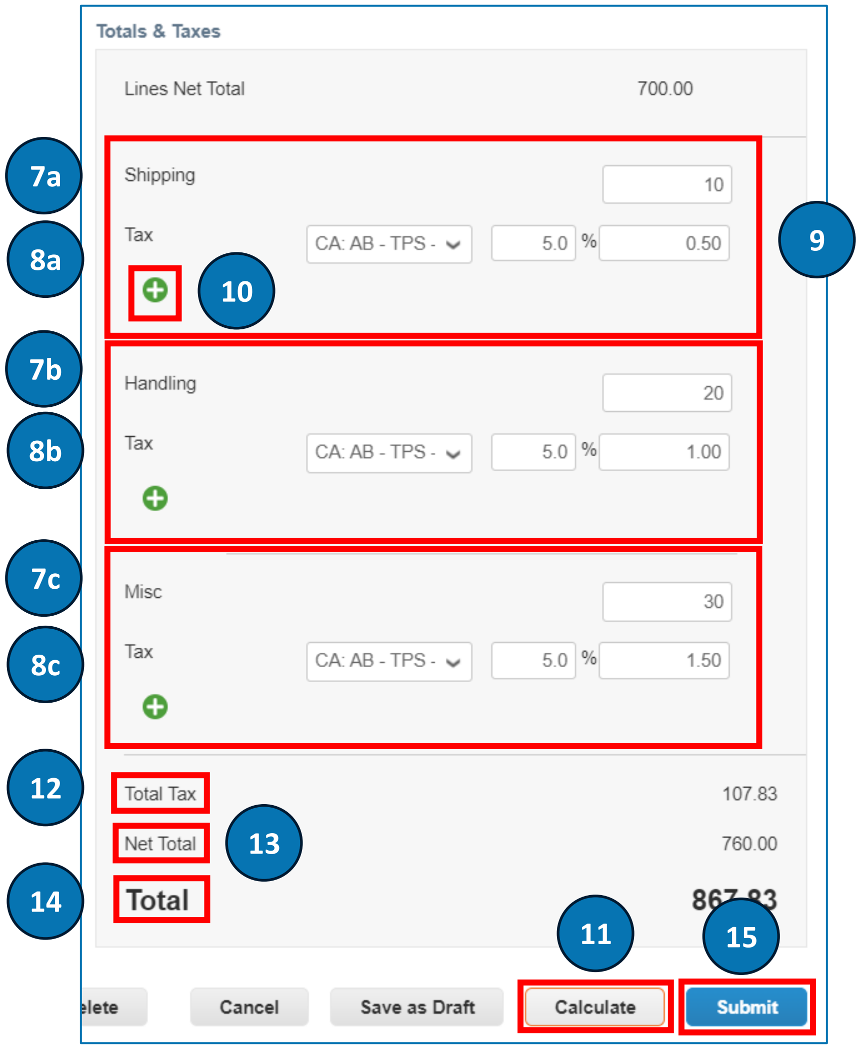




INVOICE CREATION VIA CSP (LINE LEVEL TAXATION)

7. Enter the **Shipping (7a)**, **Handling (7b)** and **Misc (7c)** charges if applicable
8. To enter tax rate (%) at **Shipping (8a)** / **Handling (8b)** / **Misc (8c)**, select the tax code from the dropdown list if applicable*
9. **Tax Rate** and **Tax Amount** gets defaulted based on the Tax Code selected
10. Click on the green'**+**' icon to enter second tax line if required
11. Click on **Calculate** button
12. The **Total Tax** field will display the total tax calculated on the invoice
13. The **Net Total** field will display the Line and other charges total
14. The **Total** field will display the cumulative sum of Total Tax and Net Total
15. Click on **Submit** button to submit the invoice created

*Please enter Shipping / Handling / Misc charges tax amounts in the tax fields highlighted for line level taxation



LESSON **8**

CREDIT NOTE CREATION (CSP)

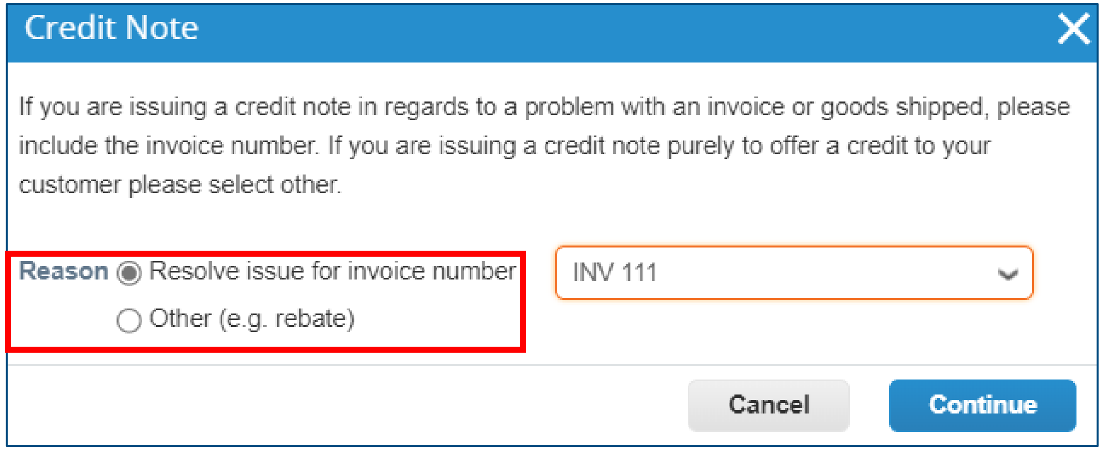
CREDIT NOTE CREATION (CSP)

Credit Notes can be created in two ways within CSP:

1. Resolve Issue for Invoice number: For example, resolve a problem related with goods or services for which an invoice exists in the system
2. Other (e.g. rebate): For example, issue a credit note to a customer to purely offer credit without any adjustments to an invoice

Please note that the credit note needs to be approved by Olymel for both options

Invoice number cannot contain more than 16 characters otherwise this will lead to an integration error

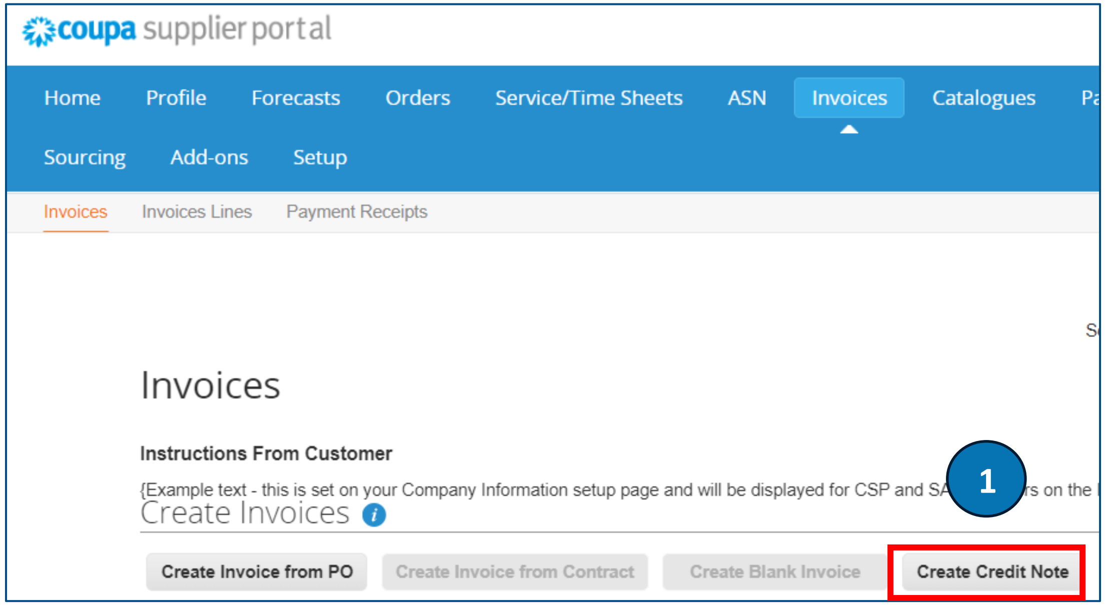


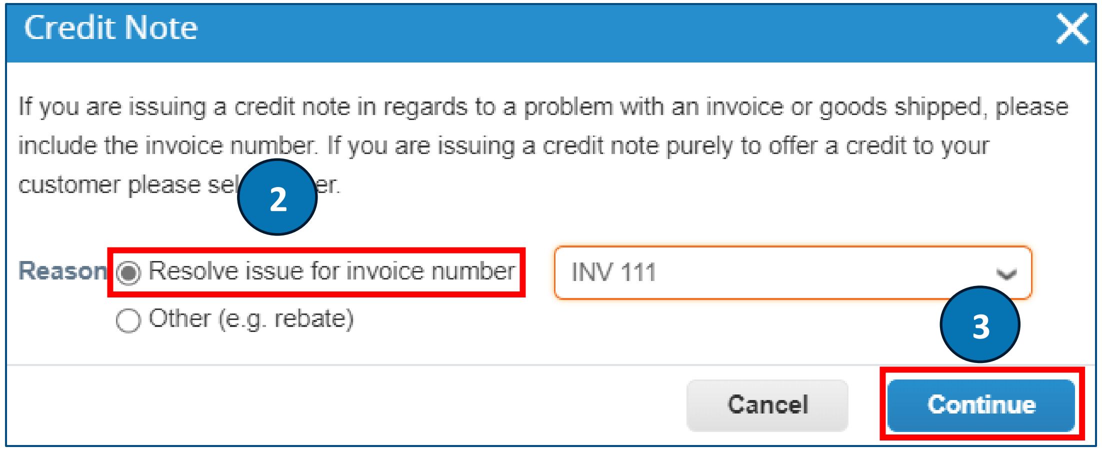
CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)

Here we will see how to create a credit note to resolve an issue with the invoice

1. Click on **Create Credit Note** button from the Invoices tab in CSP
2. A new window pops up. **Select a reason** for creating the credit note – “**Resolve issue for invoice number**” *
3. Click on **Continue** button

*Reason consist of 2 options “Resolve issue for invoice number” and “Other (e.g. rebate)”. This is to identify for which reason the credit note is being created.



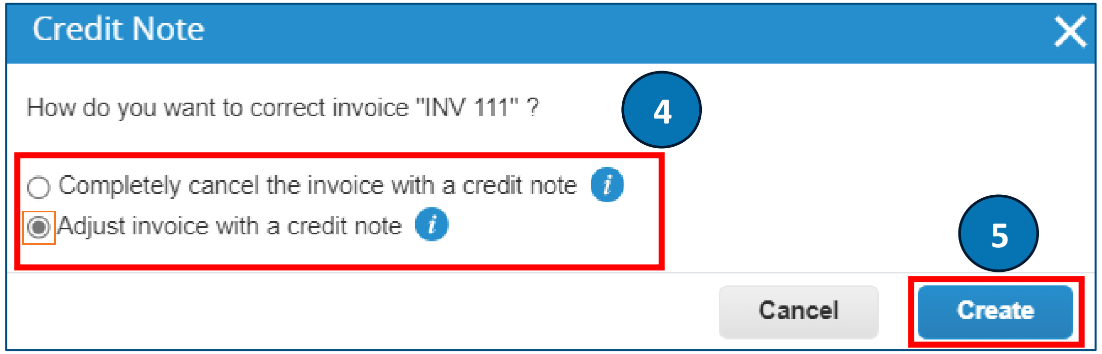


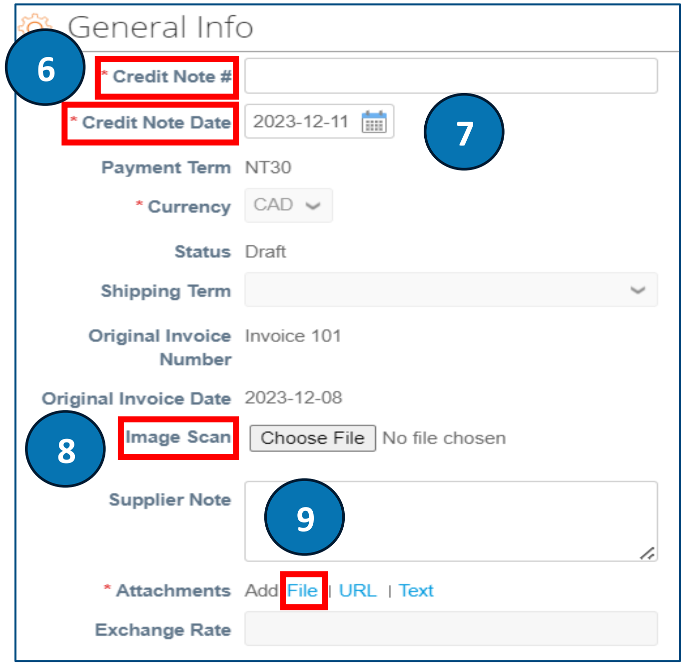
CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)

4. Select your choice – "**Completely cancel the invoice with a credit note**" or "**Adjust invoice with a credit note**" *
5. Click on **Create** button
6. Enter the **Credit Note #** (Mandatory)
7. Select the **Credit Note Date** (Mandatory)
8. For **Image Scan** field, upload the legal invoice copy supporting documents (Mandatory)
9. Click on **File** hyperlink to upload the supporting documents (Mandatory)

* Completely cancel the invoice with a credit note: This option will cancel the full invoice against the credit note, also you will not have the option to edit the amount/qty

* Adjust invoice with a credit note: This option allow you to modify the amount/qty for which the credit note needs to be created and the invoice can be partially adjusted with the credit note





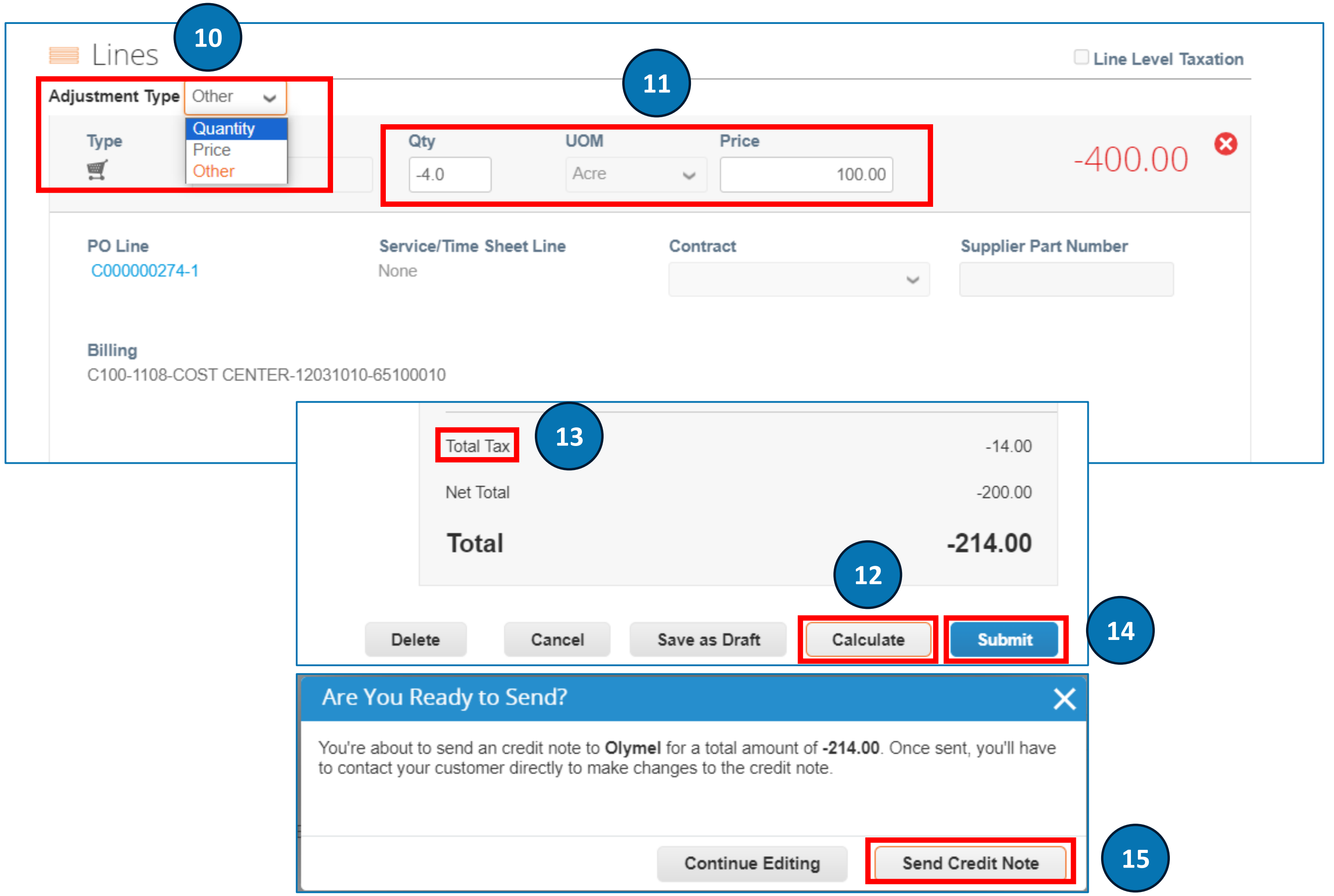
CREDIT NOTE CREATION – A) RESOLVE ISSUE INVOICE TAB (CSP)

Scroll down to lines section

10. Choose the adjustment type on the line items – **Quantity**, **Price** or **Other**
11. Enter the adjustment either on the **Quantity** (negative number) or **Price** (negative number) fields(or **both**) based on the Adjustment type you chose, and as applicable

Scroll down to the bottom of the invoice.

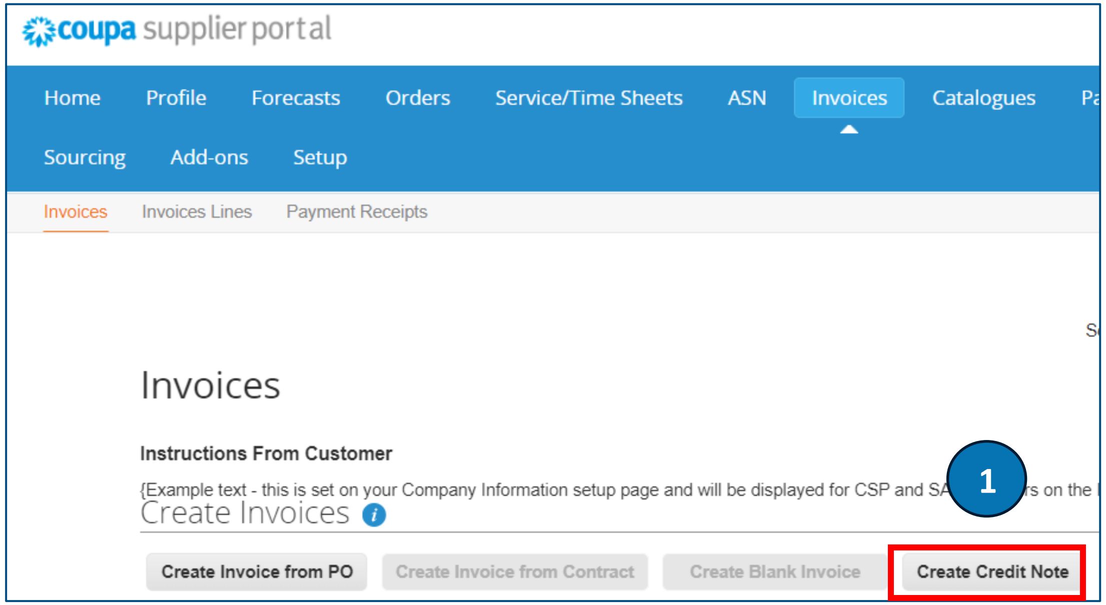
12. Click on **Calculate** to recalculate the Credit note **total** amount.
13. Taxes get auto reversed based on the updates made on the line and the **Total Tax** field displays the same
14. The invoice gets adjusted as per the input. Enter **Submit** to issue the credit note
15. A pop-up message appears asking you to confirm your action. Click on **Send Credit Note** to send the credit note.

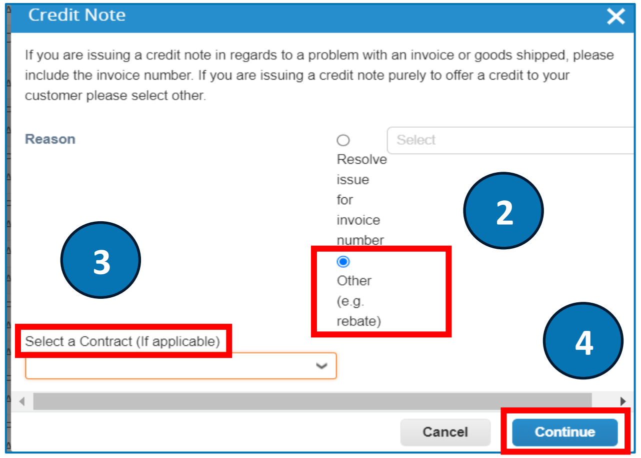


CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)

Here we will see how to create a credit note to purely offer a credit to the customer

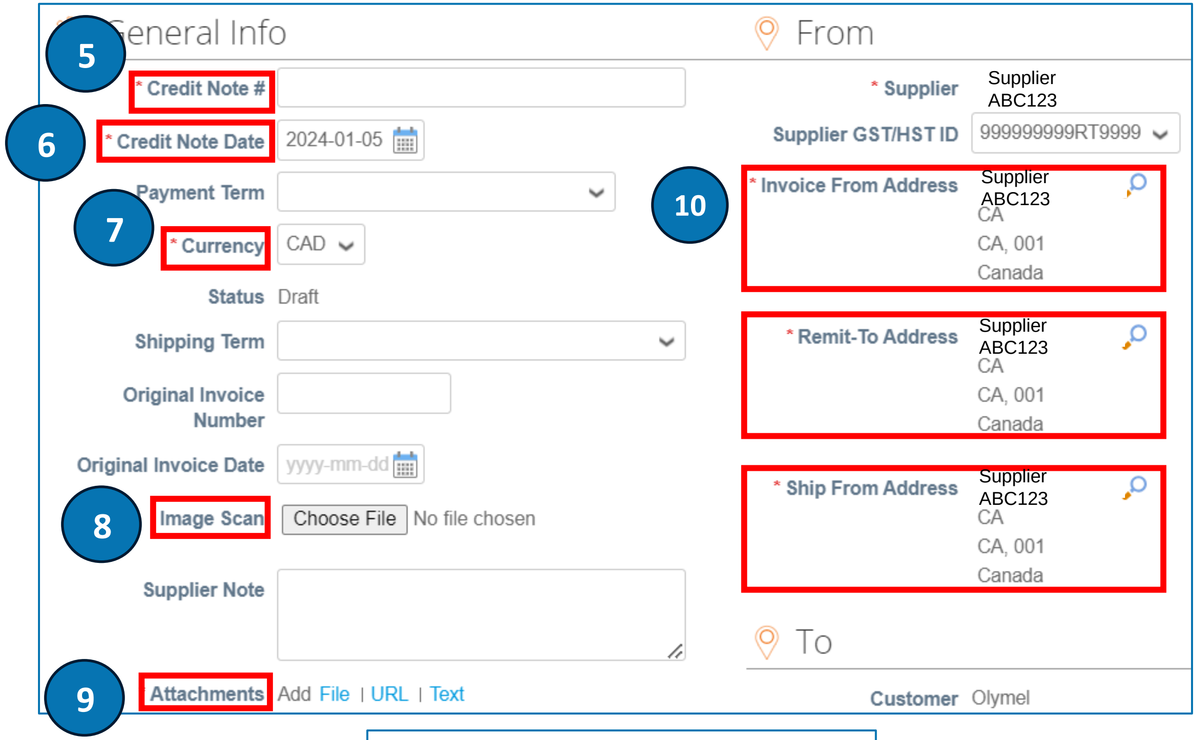
1. Click on **Create Credit Note** button
2. A new window pops up. **Select a reason** for creating the credit note – “**Other (e.g. rebate)**” *
3. You can **Select a Contract** from the dropdown list if applicable
4. Click on **Continue** button

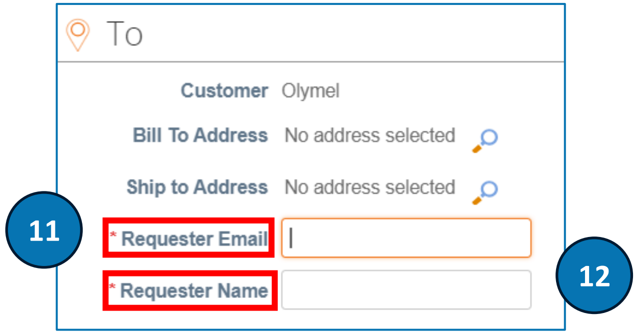




CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)

5. Enter the **Credit Note #** field (Mandatory)
6. Select the **Credit Note Date** (Mandatory)
7. The **Currency** field will be defaulted to CAD (Mandatory)
8. In the **Image Scan** field, upload the legal invoice copy (Mandatory)
9. Please upload the supporting documents in the **Attachments** field
10. Click on the **magnifying glass icon** to select the address for **Invoice From Address**, **Remit-To Address** and **Ship From Address** fields (Mandatory)
11. Enter the **Requester Email** (Mandatory)
12. Enter the **Requester Name** (Mandatory)





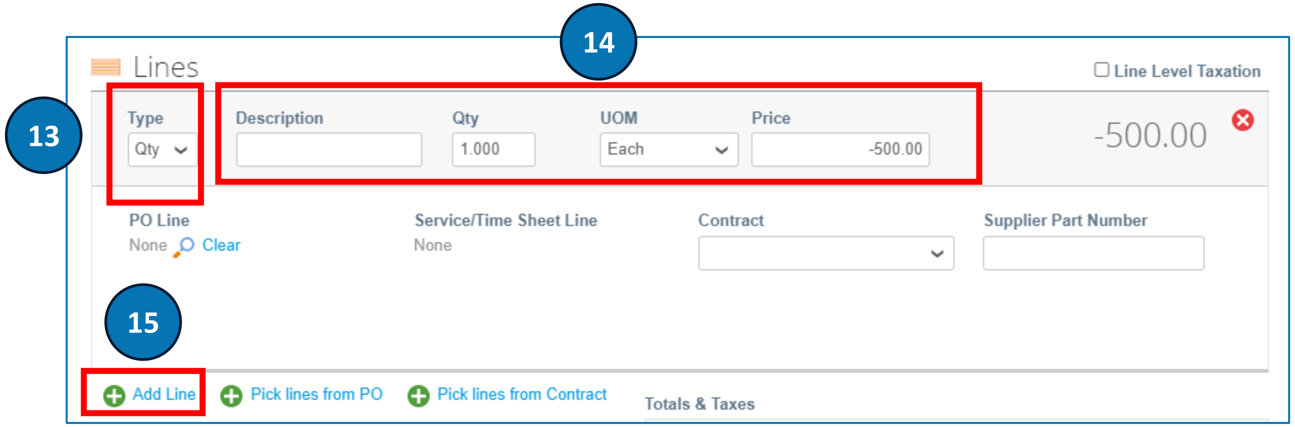
The Credit Note created acts as a standalone Credit Note

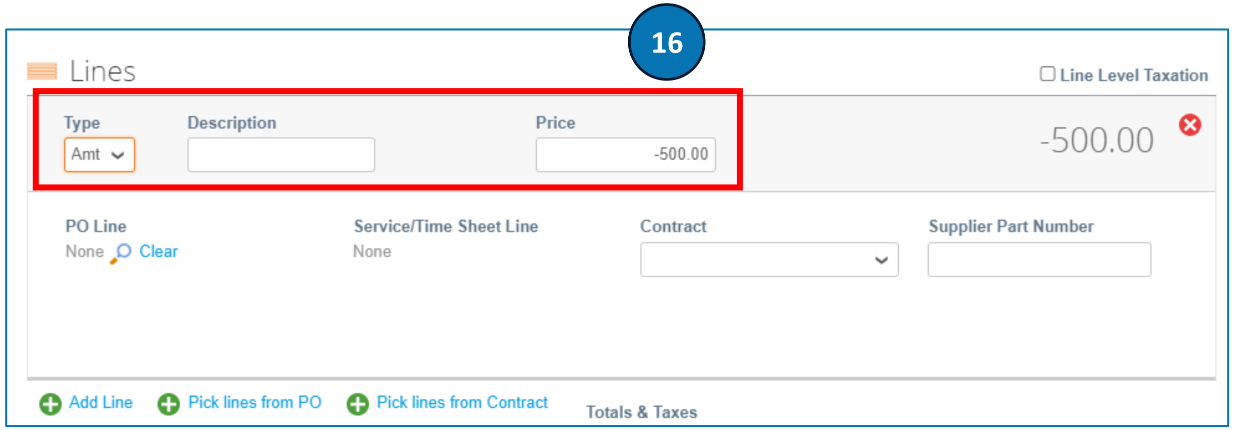
For a standalone Credit Note, populate the Original Invoice Number field as NA. For Original Invoice Date field, populate today’s date

Credit note number cannot contain more than 16 characters otherwise this will lead to an integration error

CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)

13. Select the **Type** as **Qty** for Item based line or **Amt** for a Service based line
14. Add **Description**, **Qty** (negative number), **UOM** and **Price** fields for **Qty** Type line
15. Add **Description** and **Price** (negative number) fields for **Amt** Type line
16. Click on **Add Line** hyperlink if additional credit note lines needs to be added



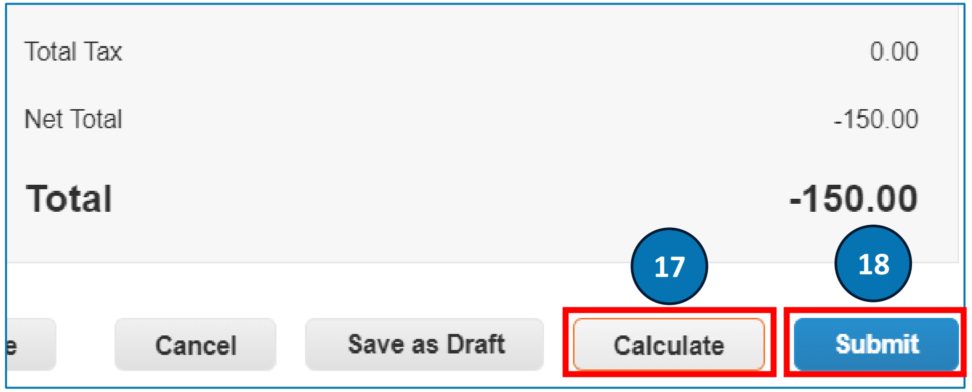


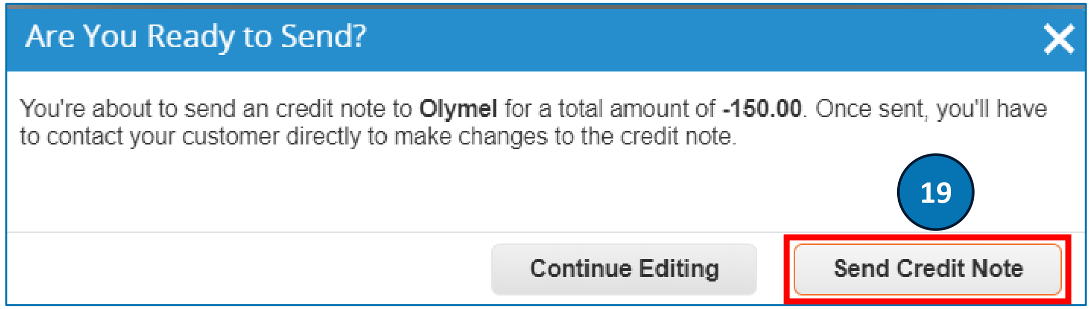
CREDIT NOTE CREATION – B) OTHER (E.G. REBATE)

17. Click on **Calculate** to recalculate the Credit note **total** amount.

18. The invoice gets adjusted as per the input. Enter **Submit** to issue the credit note

19. A pop-up message appears asking you to confirm your action. Click on **Send Credit Note** to send the credit note.





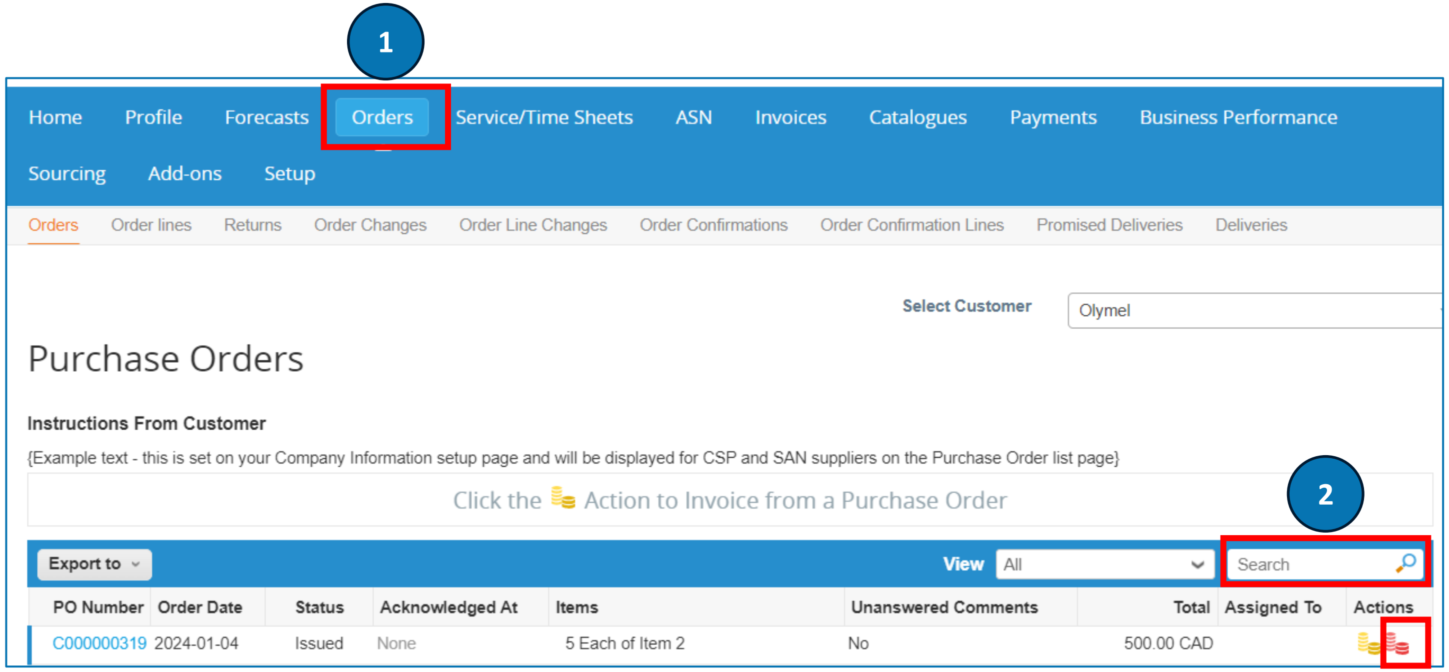
CREDIT NOTE CREATION – PO FLIP (CSP)

You can also create a credit note from an Order line.

1. Click **Orders** from the top menu bar.
2. Search for the **order** in the displayed orders from the Search window
3. Click on the **red coin stack** icon to initiate a **Credit note**

The Credit Note page appears

4. Follow steps from Slide in lesson 5



LESSON **9**

INVOICE DISPUTE (CSP)

INVOICE DISPUTE (CSP)

If Olymel disputes an invoice, the invoice will be in status “Disputed” for the supplier to take action on.

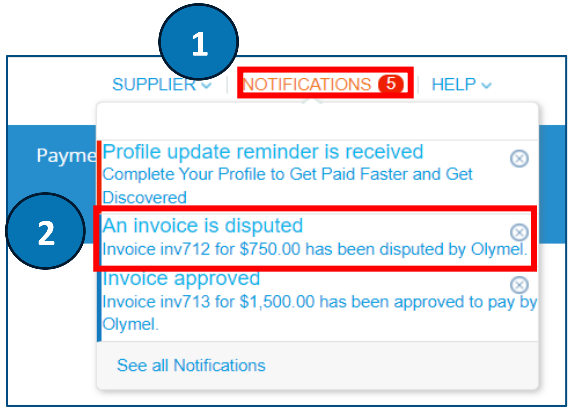
There are 2 ways to resolve invoice disputes:

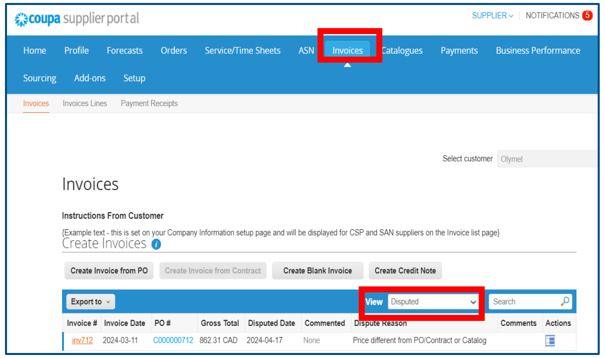
- **Correct Invoice**: If the disputed invoice has some incorrect detail, please choose Correct Invoice option to allow a correction to the invoice
- **Void**: If the disputed invoice was duplicate or has been already paid for, you can use the Void option to void the invoice

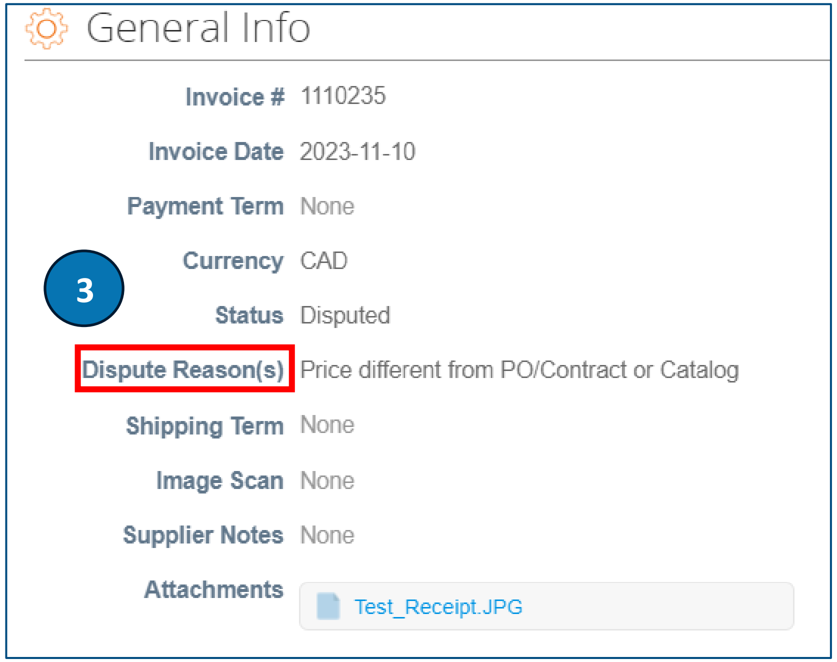
INVOICE DISPUTE – A) CORRECT INVOICE (CSP)

You can view the disputed invoices from the **NOTIFICATIONS** section as well as from the **Invoices** section

1. Hover your cursor on the **NOTIFICATIONS** section to check dispute invoices
2. Click on the notification hyperlink
3. In General Info section, you can check for the **Dispute Reason(s)**

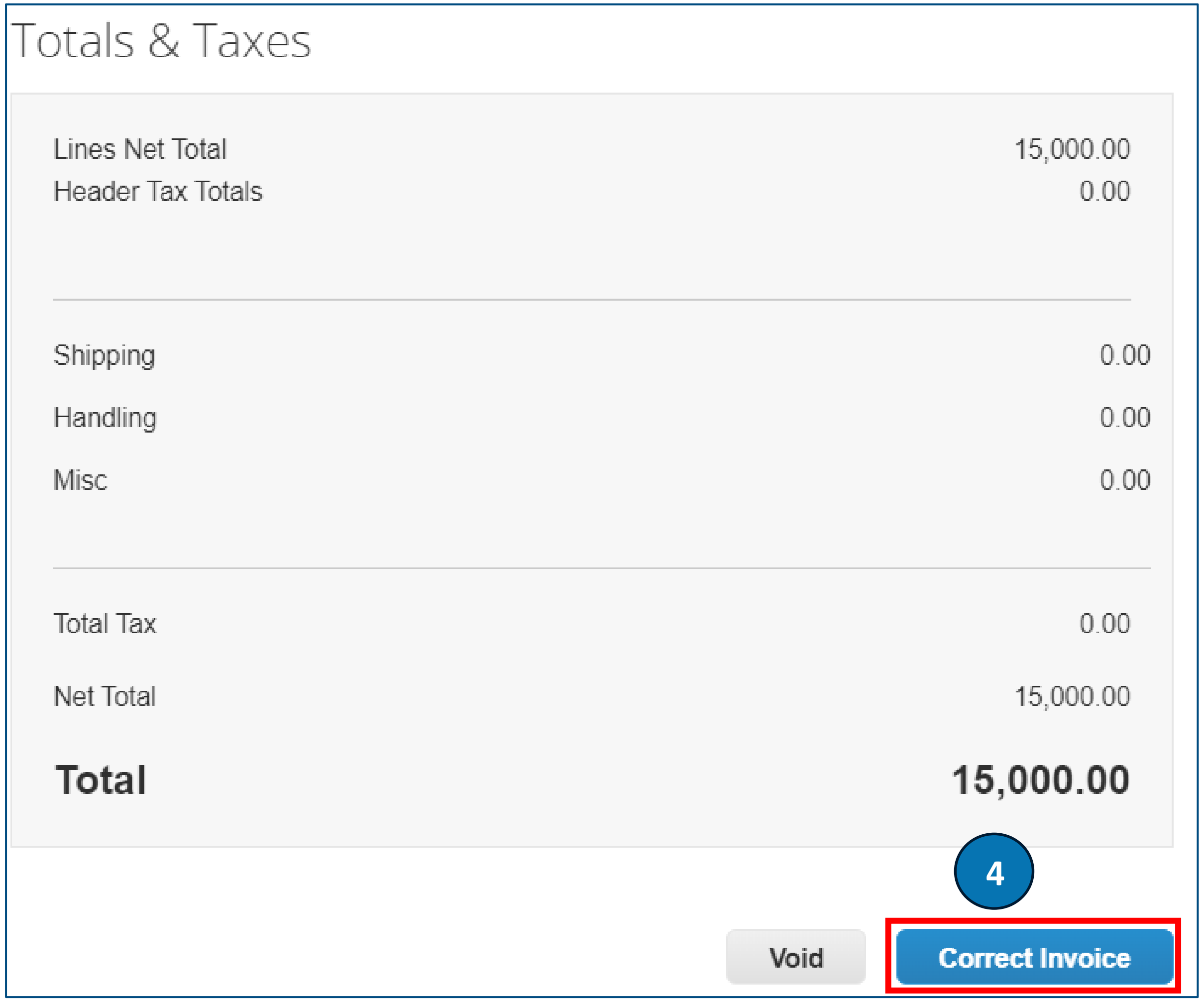






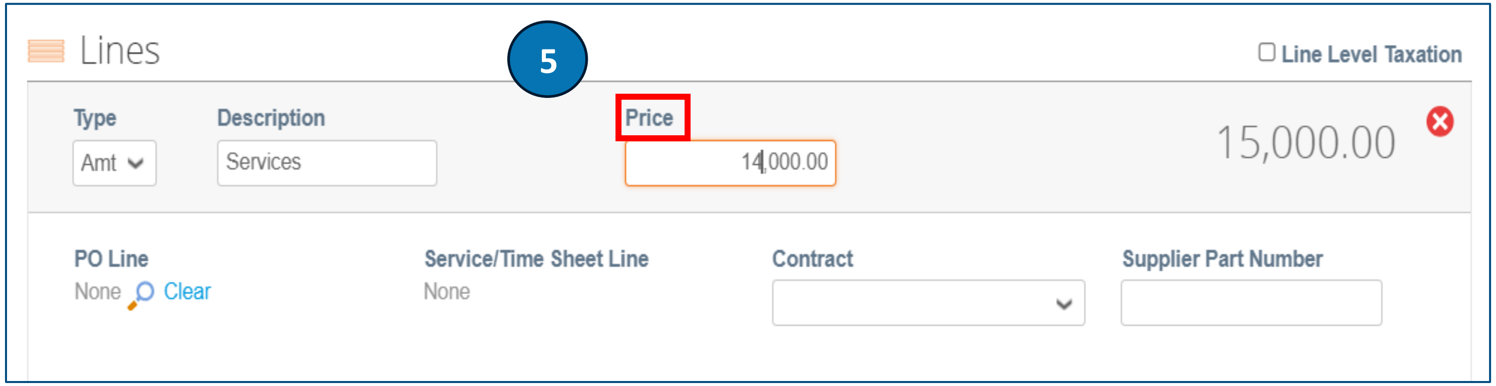
INVOICE DISPUTE – A) CORRECT INVOICE (CSP)

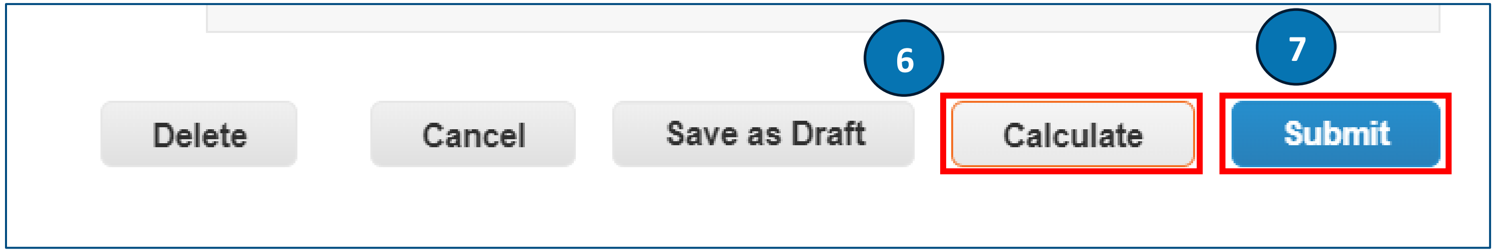
4. Click on Correct Invoice button

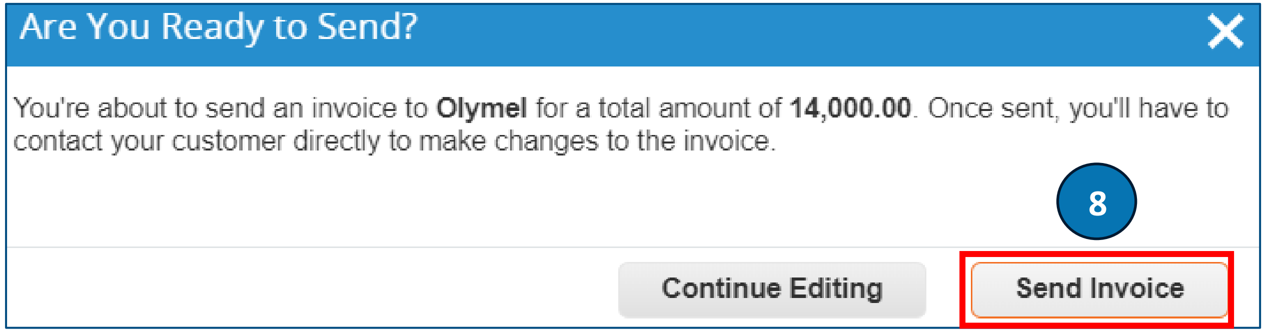


INVOICE DISPUTE – A) CORRECT INVOICE (CSP)

5. Correct the Invoice details based on the dispute reason
6. Click on **Calculate** button
7. Click on **Submit** button
8. At the pop-up message, click on **Send Invoice** button. The invoice will be sent back to Olymel for further processing



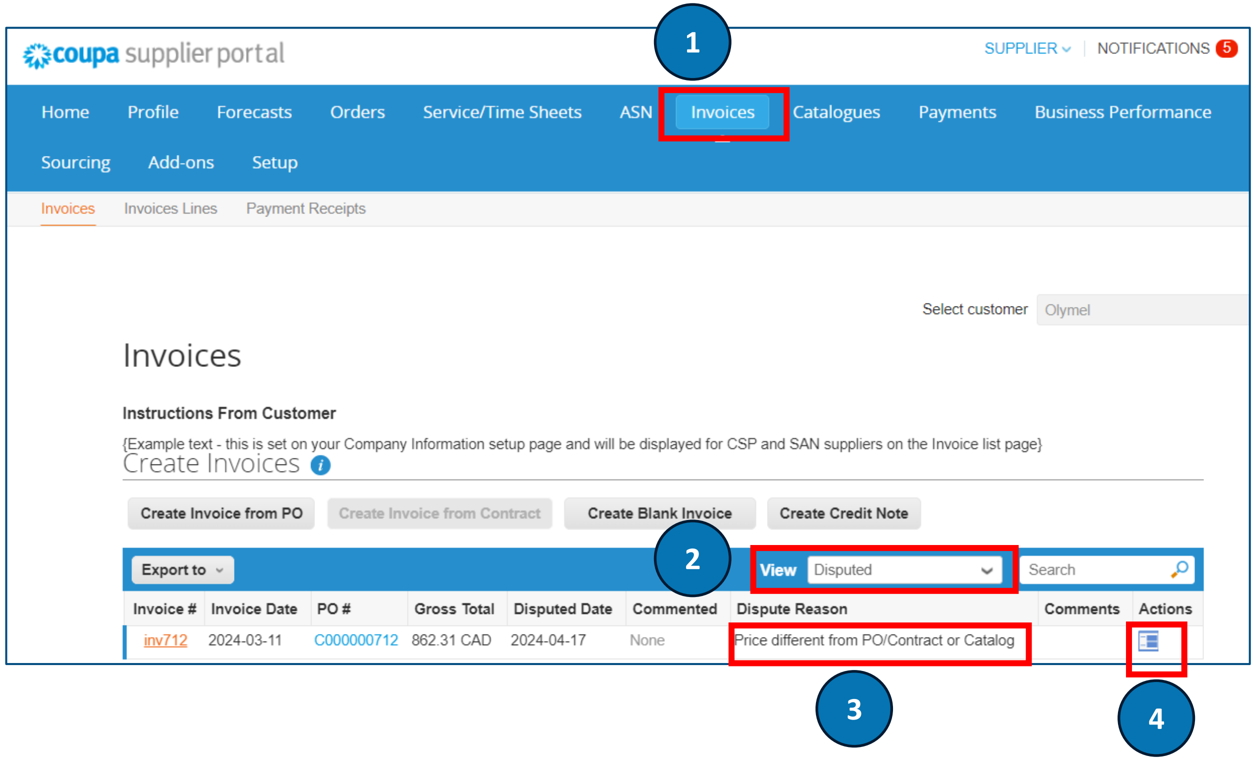




INVOICE DISPUTE – B) VOID INVOICE (CSP)

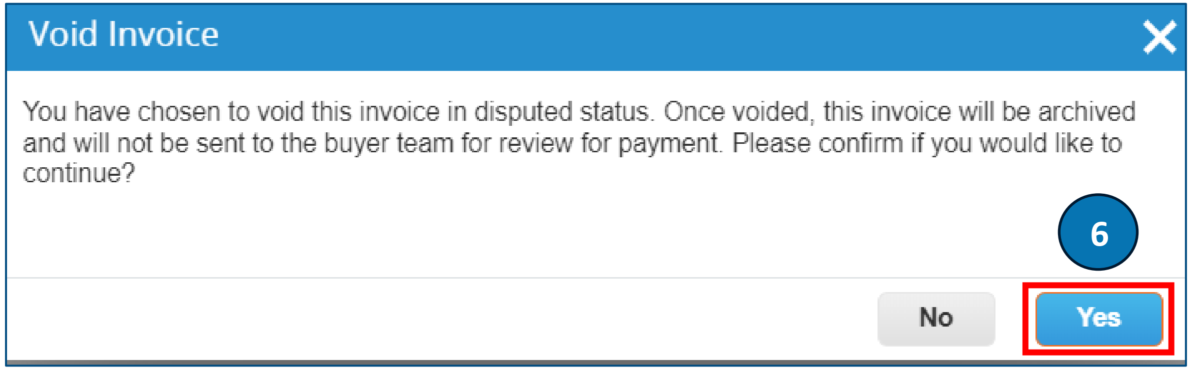
Here we will see how to void a disputed invoice

1. Click on the **Invoices** section
2. Select the **View** as **Disputed** from the dropdown list
3. You can see the **Dispute Reason** mentioned
4. Click on the **Resolve** icon



INVOICE DISPUTE – B) VOID INVOICE (CSP)

5. Click on the **Void** button
6. At the pop-up message, click on **Yes** button to void the invoice
7. You will see a message stating Successfully voided the invoice

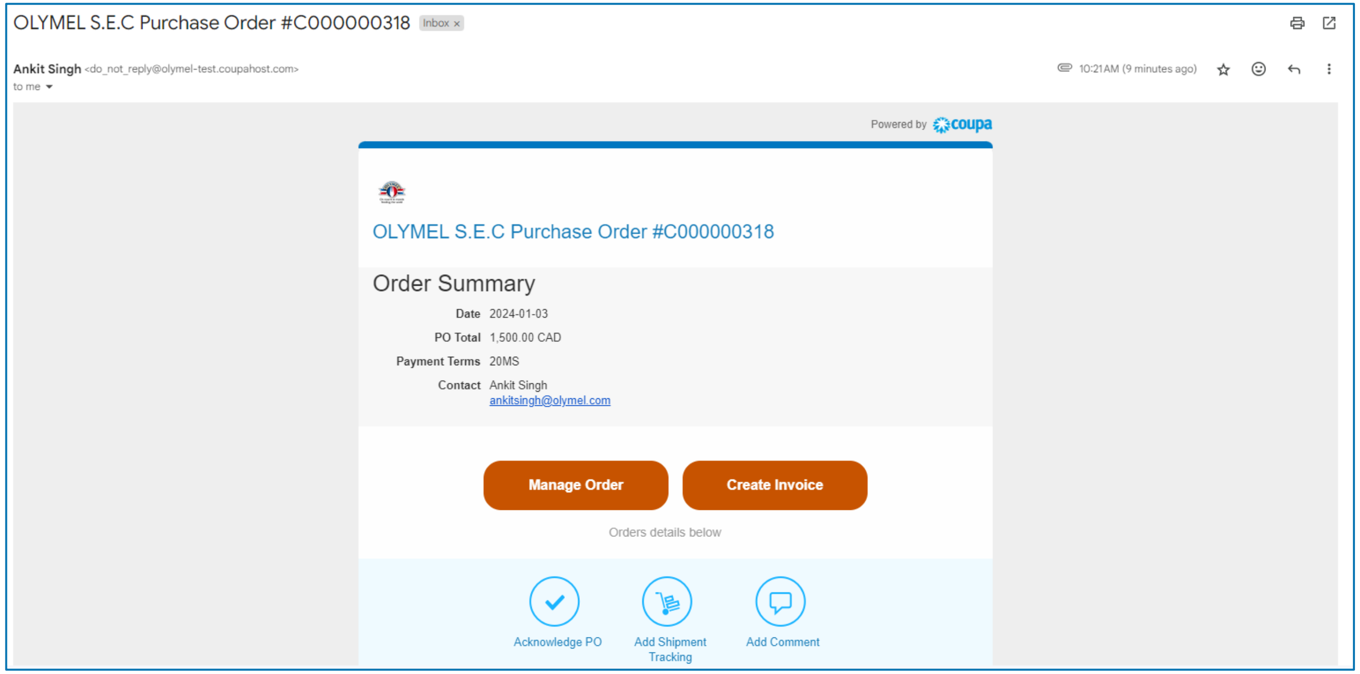


LESSON **10**
SUPPLIER ACTIONABLE NOTIFICATIONS (SAN)

SUPPLIER ACTIONABLE NOTIFICATION (SAN)

Supplier Actionable Notifications (SAN) allow suppliers to act on POs directly from email notifications for POs created in Coupa, having the options to **manage orders**, **acknowledge**, **create an invoice** from, or **add a comment** to a PO

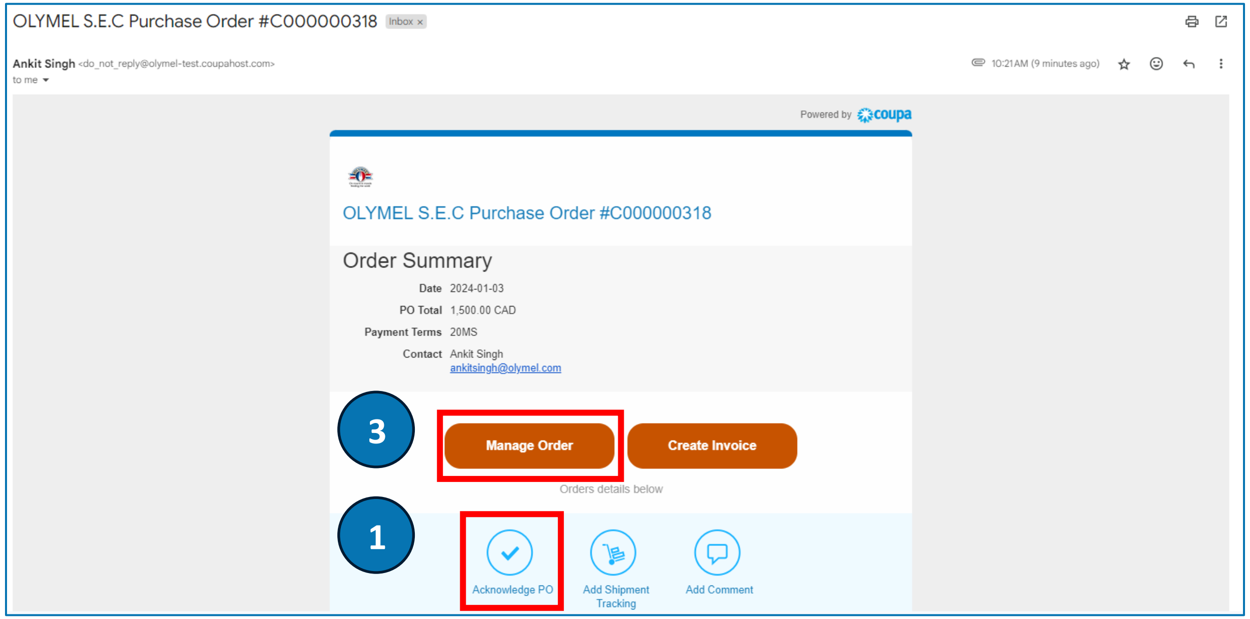
Here is a screenshot of a SAN notification received by a supplier in their email

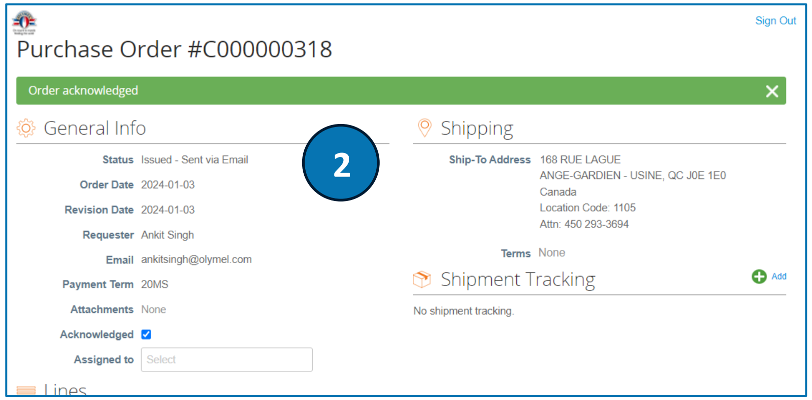


SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER

You can Acknowledge PO and Manage the Order using the SAN functionality

1. Click on **Acknowledge PO** icon
2. The Purchase Order will be acknowledged as seen in the screenshot
3. In order to manage order, Click on the **Manage Order** icon mentioned in the email

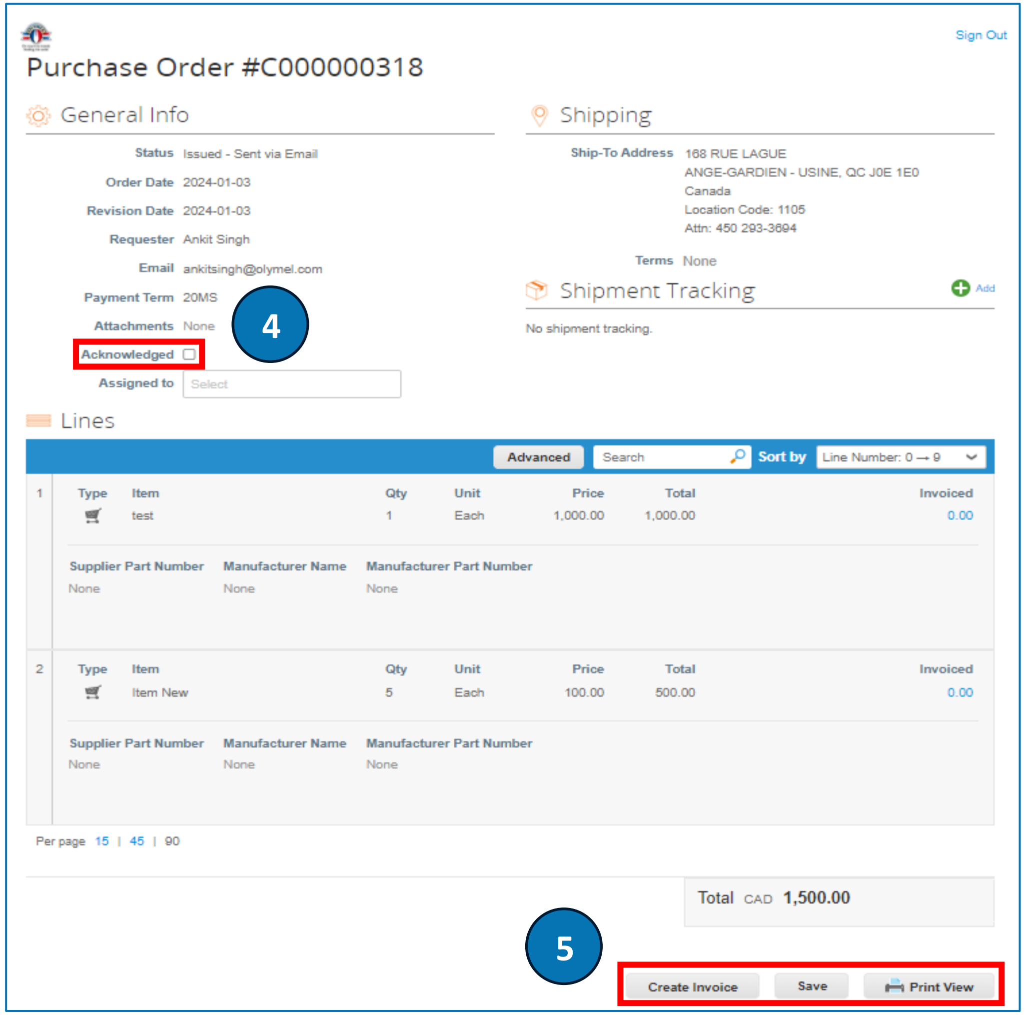




SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER

4. You have the option to Acknowledge the PO by checking the **Acknowledged** checkmark

5. You can use the **Create Invoice** button to create invoice for the PO, **Save** the PO and get a **Print View** of the PO

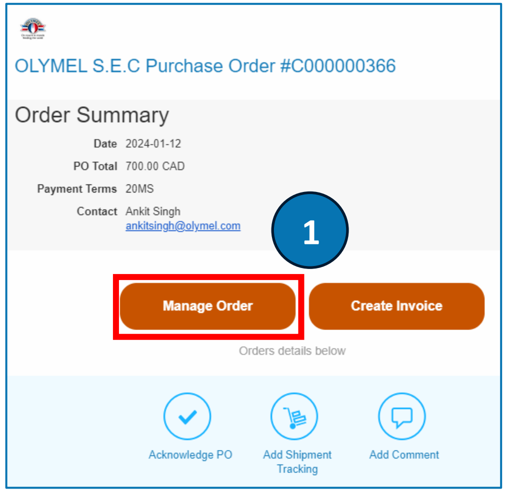


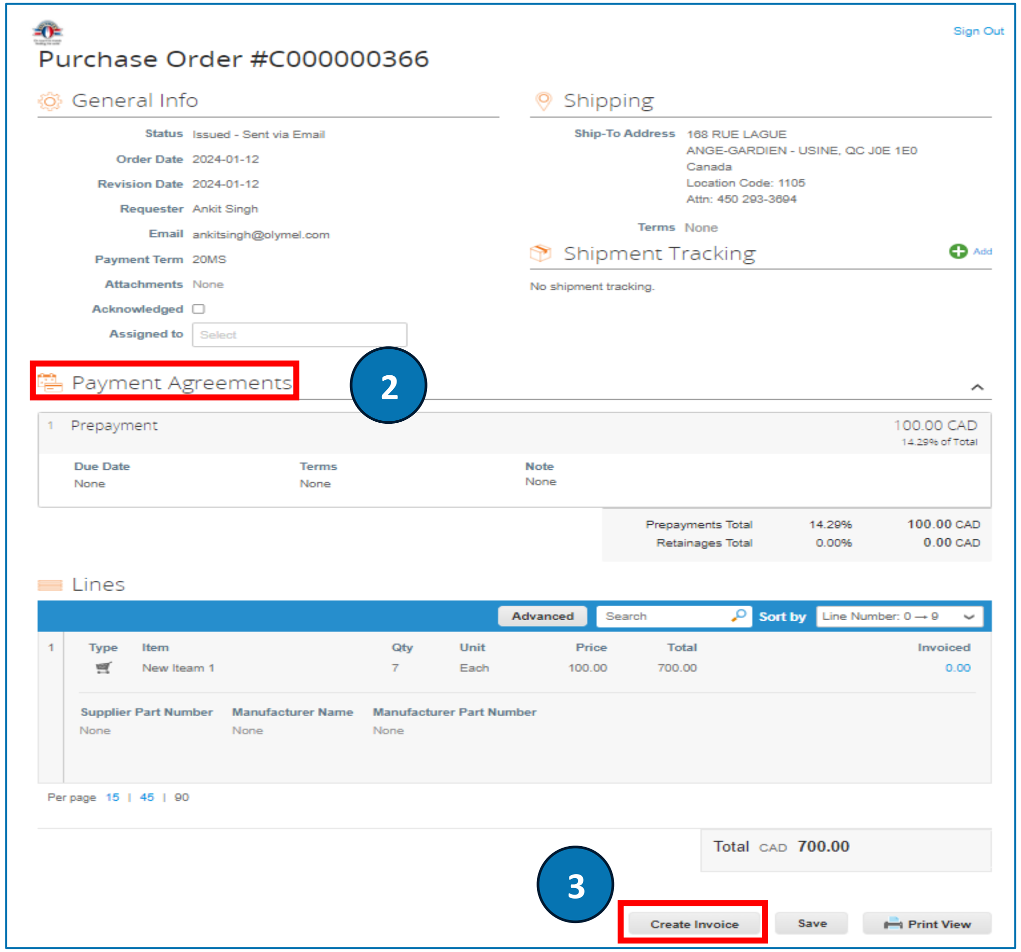
SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ACKNOWLEDGE PO & MANAGE ORDER PAYMENT AGREEMENT ON PURCHASE ORDER)

Below are the steps to view a Payment Agreement on a Purchase Order

1. Click on the **Manage Order** button from the email notification
2. You will be able to view the Payment Agreement details on the purchase order
3. Click on **Create Invoice** button *
4. Follow the steps mentioned in slides in Lesson 5 to create an invoice

* When there is a Payment Agreement on a purchase order, irrespective of the amount, always invoice in full, when the service is fully delivered, otherwise the invoice will be rejected and disputed.

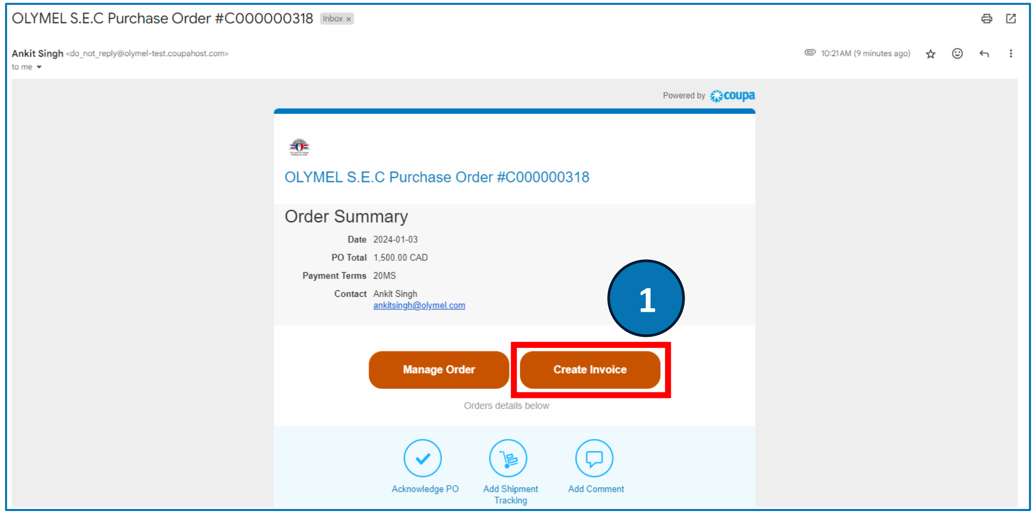


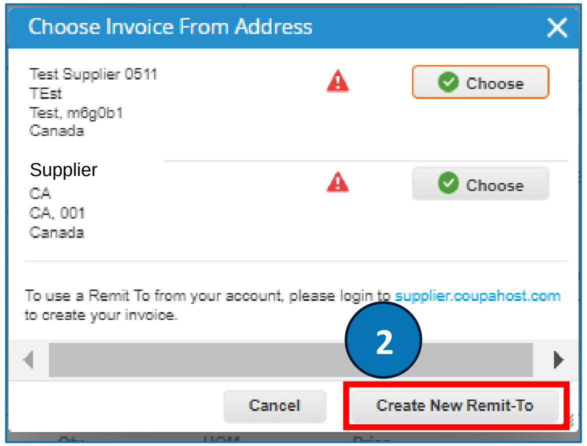


SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE

You can Create Invoice using the SAN functionality as well

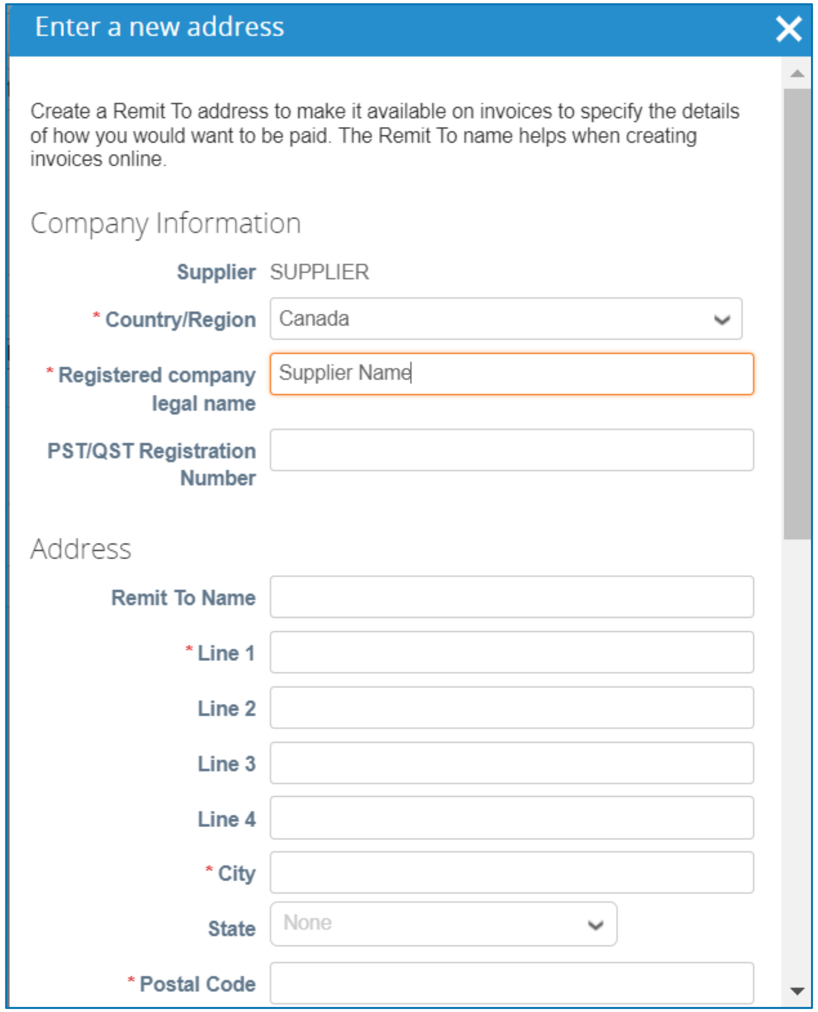
1. In order to execute this, Click on the **Create Invoice** icon mentioned in the email
2. At the pop-up message, click on **Create New Remit-To** button to create a Remit To address

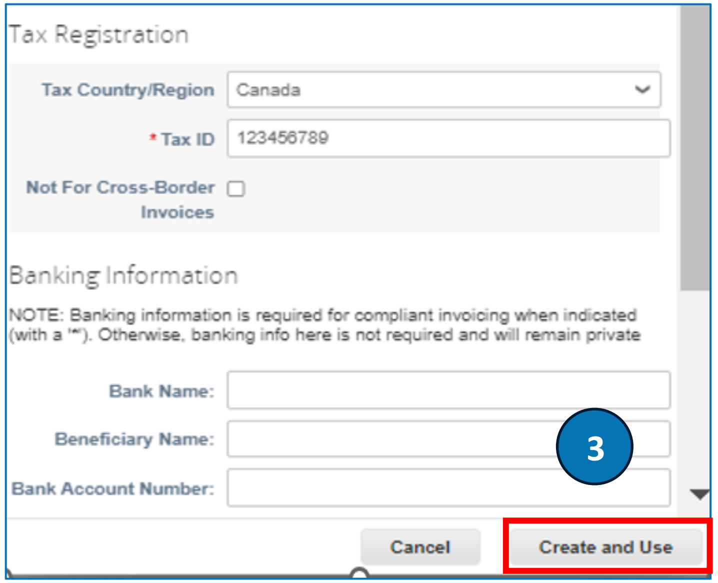




SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE

3. Populate the details as required and click on **Create and Use** button



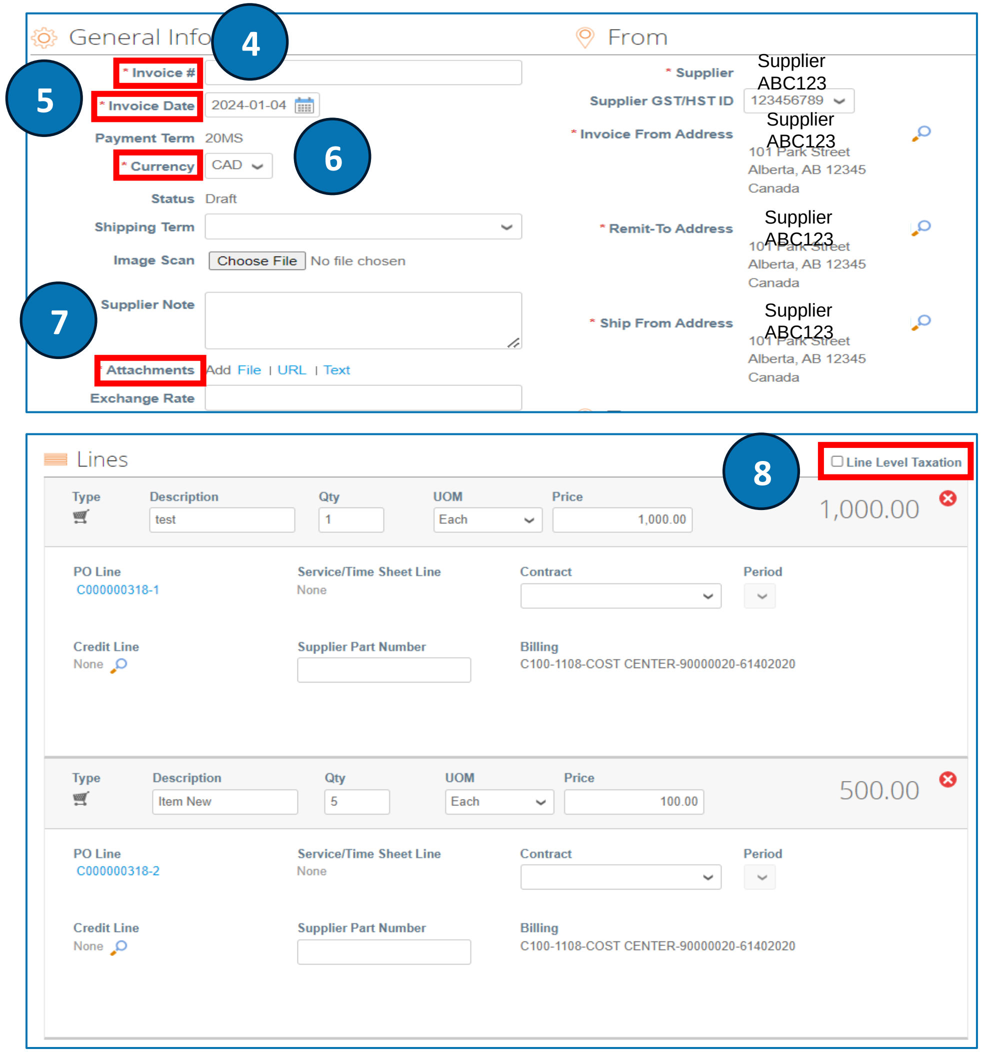


SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE

4. Enter the Invoice number in the **Invoice #** field (Mandatory)
5. Enter the **Invoice Date** (Mandatory)
6. Validate the **Currency** (Mandatory)
7. In the **Attachments** field, click on the **File** / **URL** or **Text** hyperlink and upload the documents
8. You can enter the Line Level Taxation by following the instructions listed in lesson 7

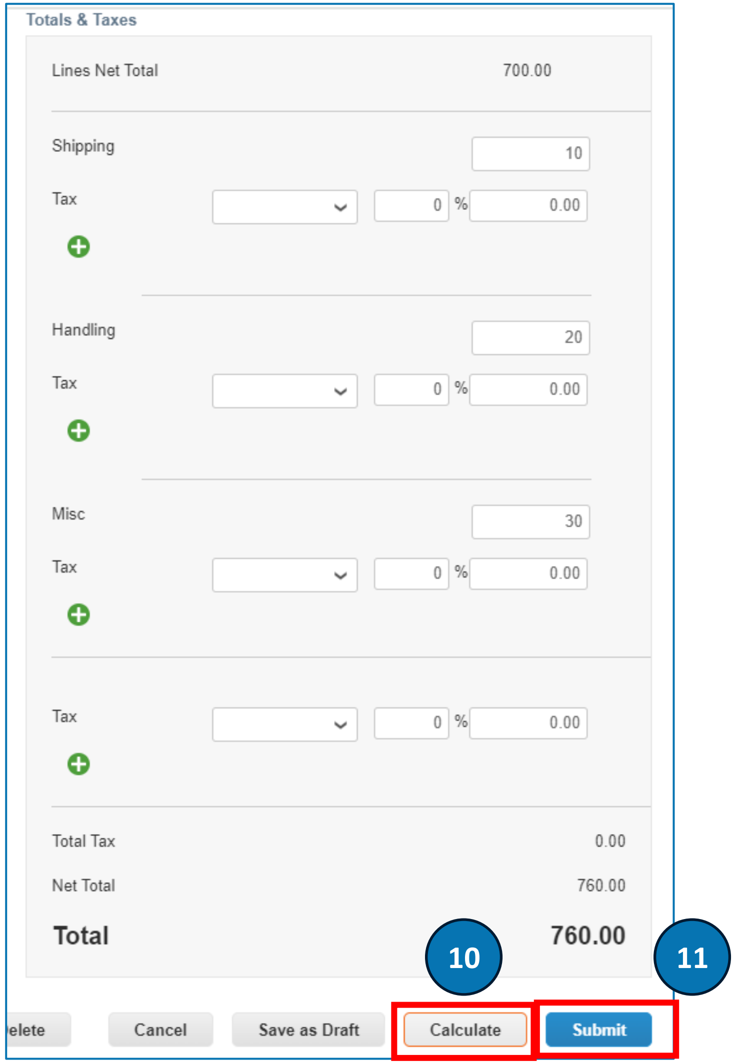
Remittance information will be maintained in Olymel's ERP system and the Remit To Address values entered in CSP will not impact payment against invoices submitted

Please do not enter Line level and Header level taxes together on the same invoice



SUPPLIER ACTIONABLE NOTIFICATION (SAN) – CREATE INVOICE

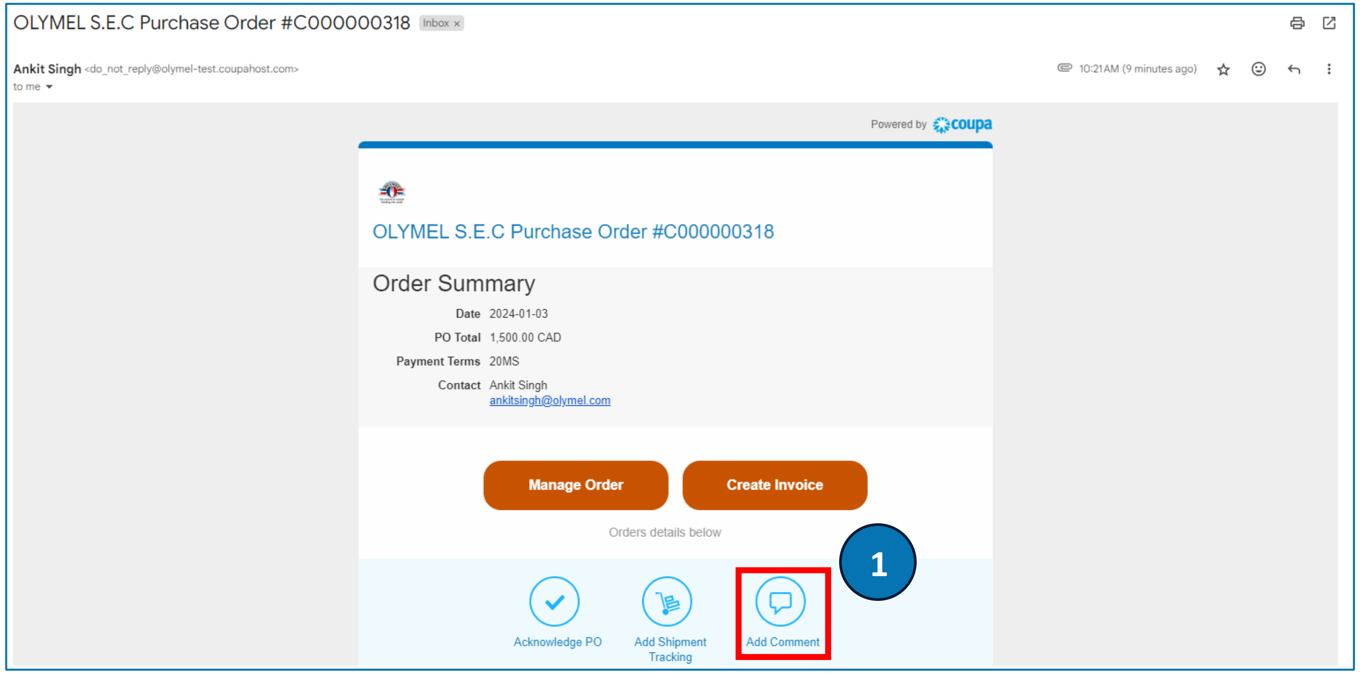
9. You can enter the Header Level Taxation by following the instructions listed on slide 53
10. Click on **Calculate** button
11. Click on **Submit** button to submit the invoice created

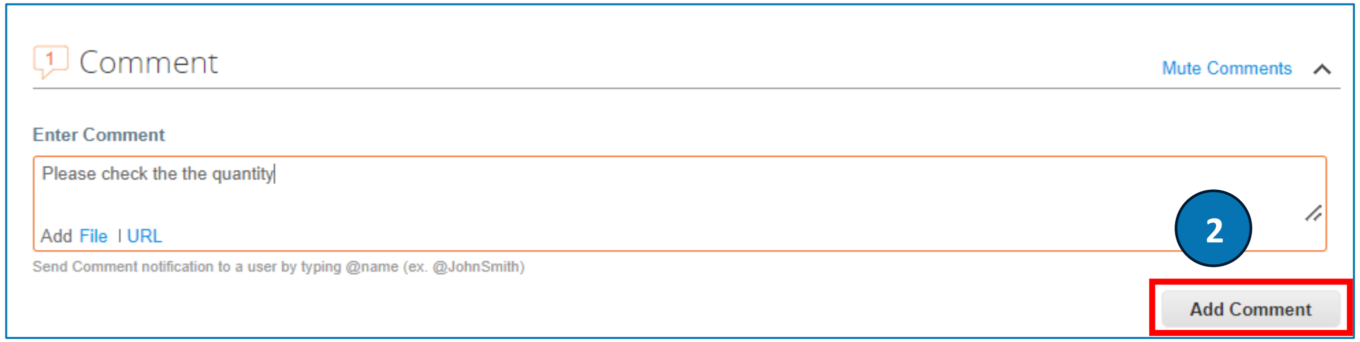


SUPPLIER ACTIONABLE NOTIFICATION (SAN) – ADD COMMENT

You can add comments on the PO using the SAN functionality as well

1. In order to execute this, Click on the **Add Comment** icon mentioned in the email
2. In the **Comment** section, add your comments and click on **Add Comment** button

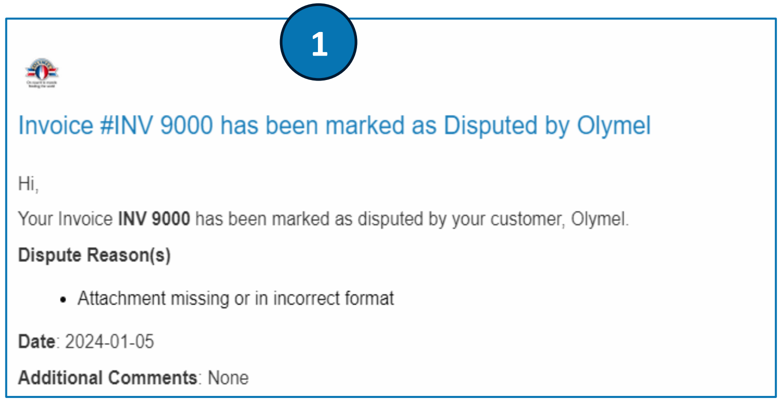


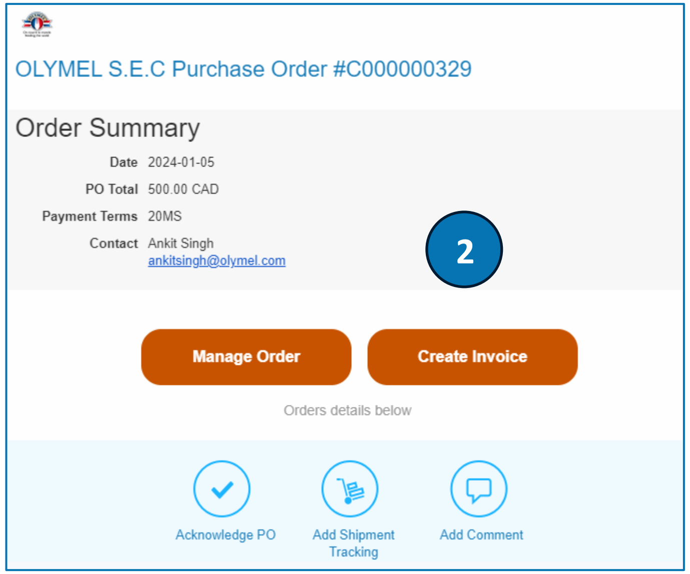


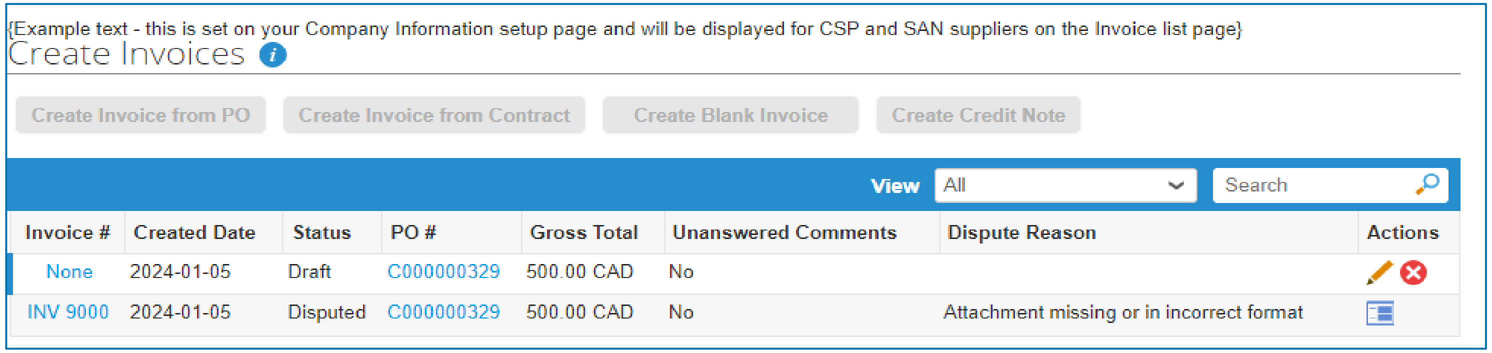
SUPPLIER ACTIONABLE NOTIFICATION (SAN) – DISPUTED INVOICES

You can resolve dispute on an invoice using the SAN functionality as well

1. You will receive your email notification for the disputed invoice
2. Go to your SAN notification and click on Create Invoice icon to view the disputed invoices
3. Follow the steps mentioned in lesson 9







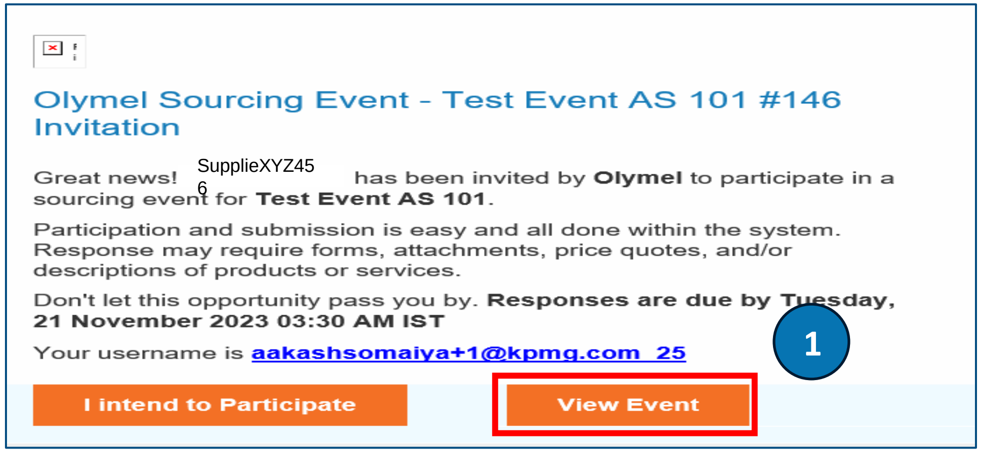
LESSON 11
SOURCING EVENT PARTICIPATION

SOURCING EVENT PARTICIPATION

Once a Sourcing Event is launched, the supplier receives an email notification to participate in the sourcing event.

Follow the below mentioned steps to participate in a sourcing event and submit your responses

1. The supplier receives an email notification for the sourcing event. Click on **View Event** button to get redirected to the event
2. Enter the **Username** and **Password**. If you are a new supplier, then you get a password reset link where you can set your password for logging into the instance. Click **To log in** button *



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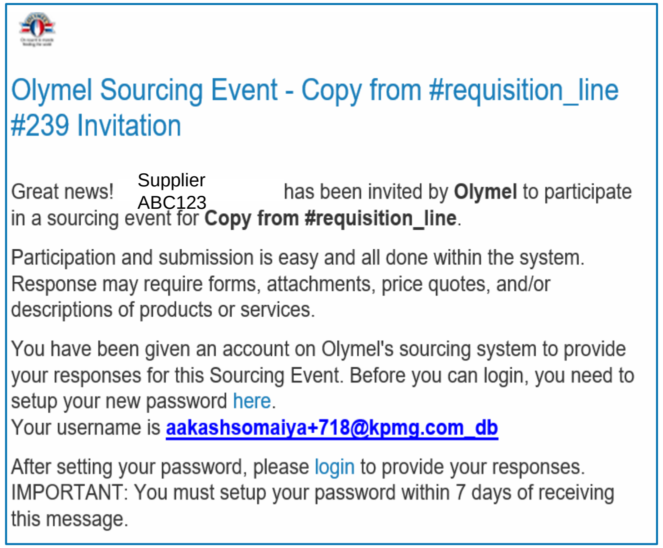
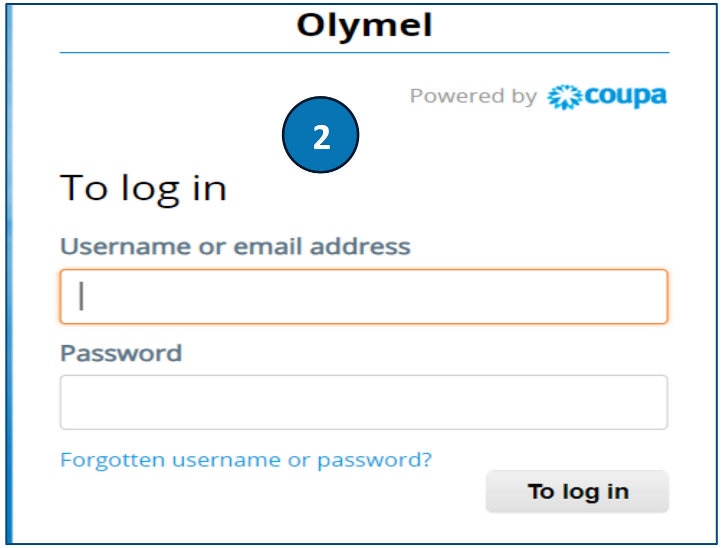
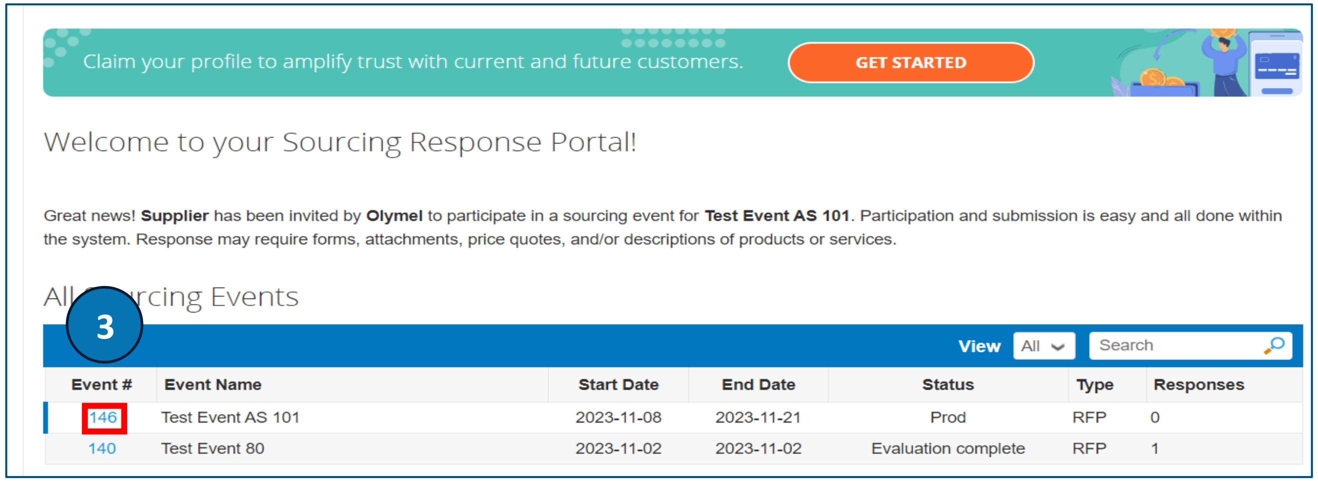


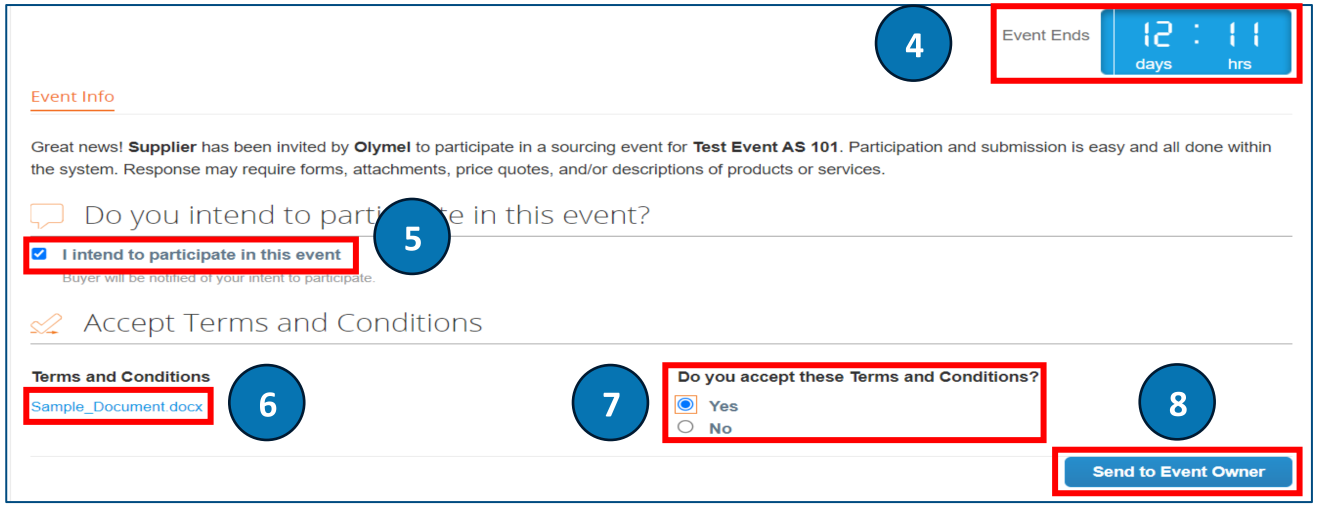


SOURCING EVENT PARTICIPATION

You will be able to view all your sourcing event that you have participated in / invited to with their status

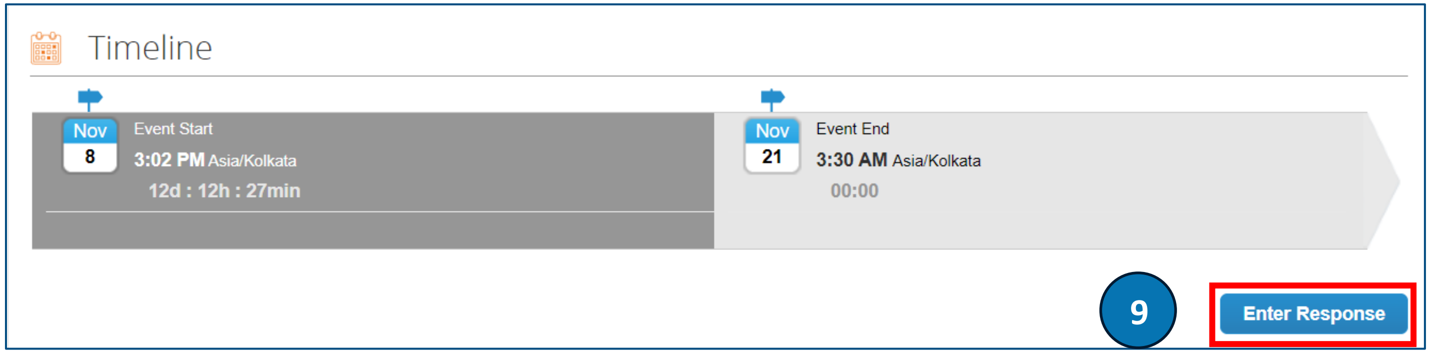
3. Click on the **Event #** hyperlink
4. You will be able to view a clock showing the **Event Ends** time
5. Checkmark the checkbox for **I intend to participate in this event** field
6. Click on the **Terms and Conditions** document hyperlink to view to terms as applicable
7. Select the radio button option as **Yes** for **Do you except these Terms and Conditions?** As applicable
8. Click on **Send to Event Owner** button

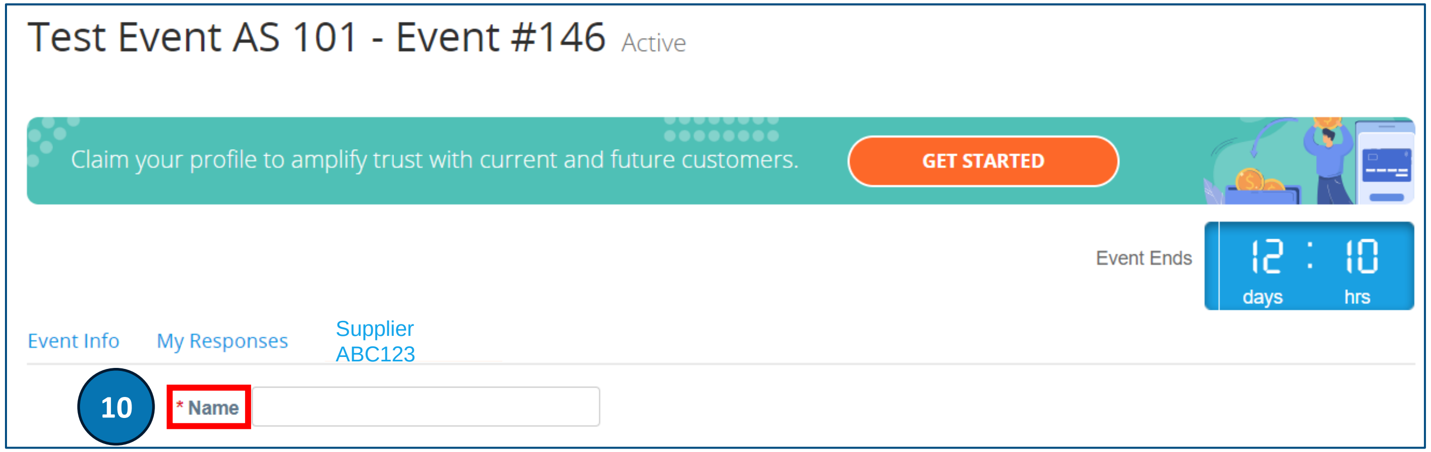




SOURCING EVENT PARTICIPATION

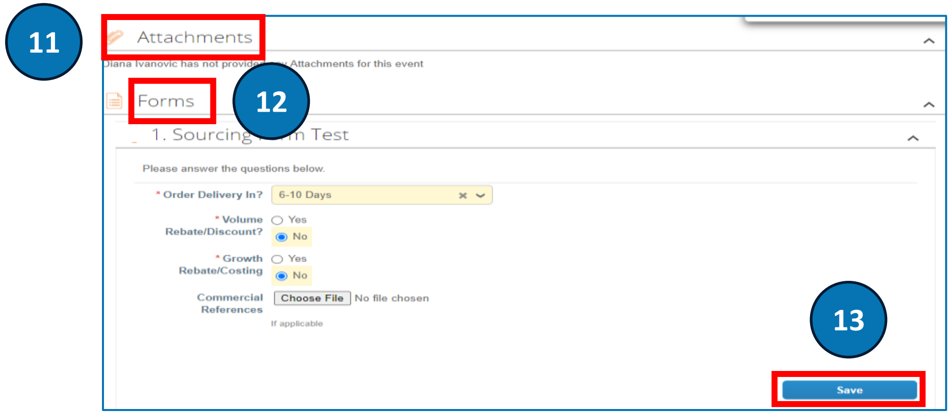
9. Event Timeline will be visible for your reference. Click on **Enter Response** button
10. Enter a **Name** of the response you are submitting to the event owner

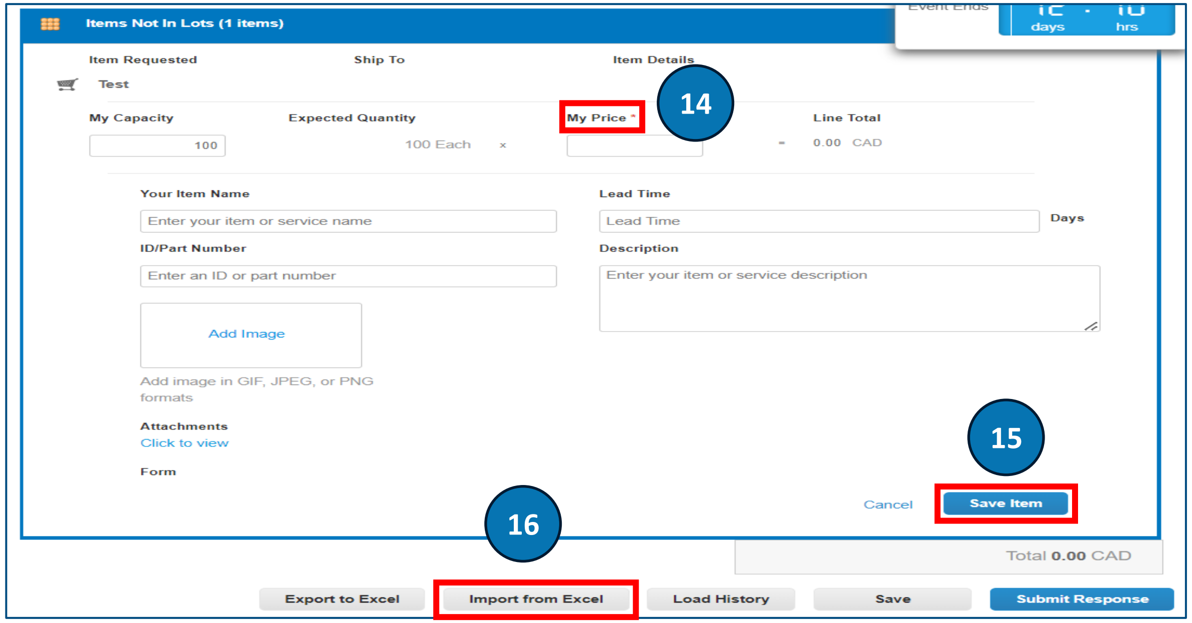




SOURCING EVENT PARTICIPATION

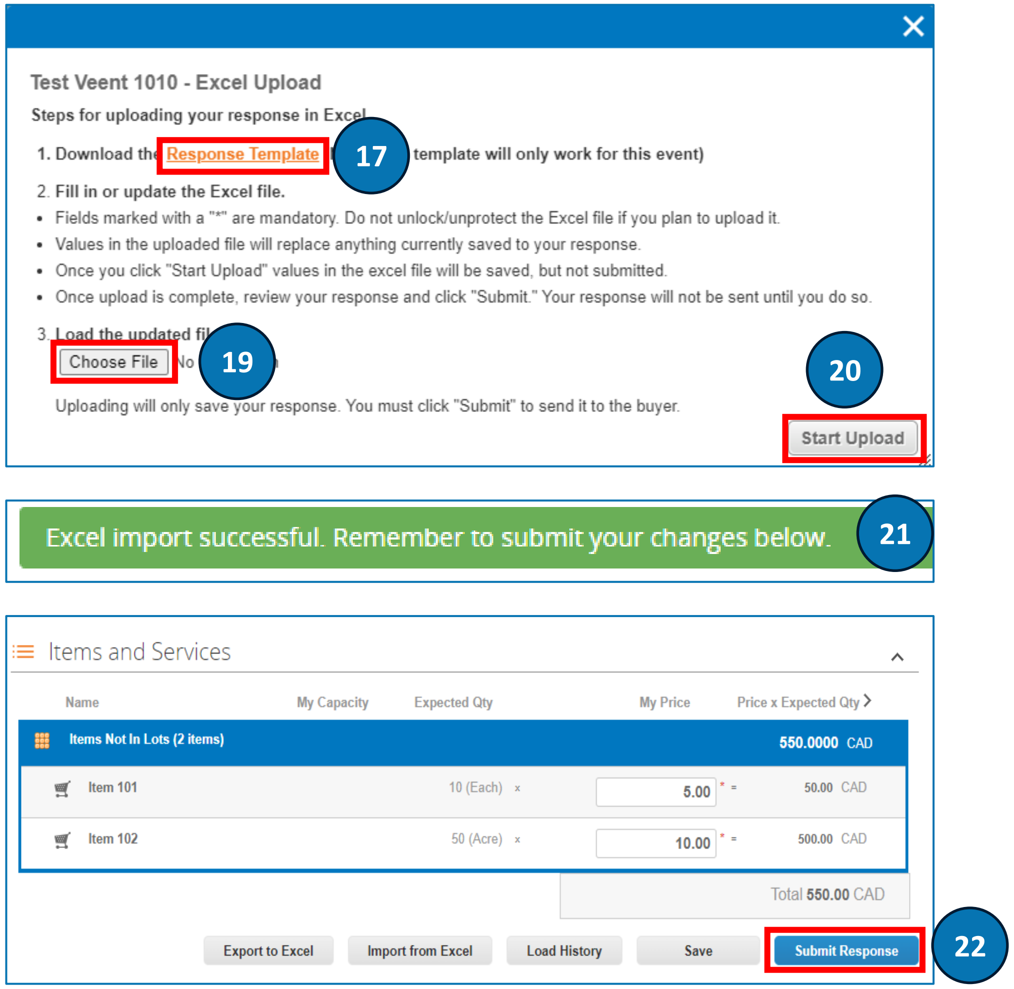
11. Download and view any **Attachments** if attached
12. Populate the details of the **Forms** as applicable
13. Click on **Save** button
14. Enter the Item details like **My Price** (Mandatory) and other fields as applicable
15. Click on **Save Item** button
16. Another way to enter the Item details is by clicking on **Import from Excel** button





SOURCING EVENT PARTICIPATION

17. Click on the **Response Template** hyperlink to download the template
18. Enter the item specific details and save the file
19. Click on **Choose File** option and upload the response template
20. Click on **Start Upload** button
21. You will see a message stating " **Excel import successful. Remember to submit your changes below**"
22. Click on **Submit Response** button to submit your event responses



COURSE SUMMARY

COURSE OBJECTIVES REVIEW

Congratulations, you have completed the course!

You are now able to:

- Register on the Coupa Supplier Portal
- Get an overview about CSP Homepage
- Invite New Users and Manage Existing Users in CSP
- View and Acknowledge a received PO (CSP)
- Create Invoice from PO
- Add Header level taxes on invoice
- Add Line level taxes on invoice

COURSE OBJECTIVES REVIEW

Congratulations, you have completed the course!

You are now able to:

- Create a Credit Note
- Resolve Invoice Disputes
- View and Respond to a PO Supplier Actionable Notifications (SAN)
- Participate and submit responses for a sourcing event

Next steps & conclusion

“No PO no PAY” - Go LIVE June 3rd 2024

	APRIL—MAY 2024	JUNE—AUGUST 2024	SEPT. —OCT. 2024	NOV. 2024
SUPPLIERS	**MESSAGE 1** 1. As of June 3 2024, a PO is mandatory for all issued invoices. 2. As of November 1 2024, invoices without a PO will be rejected. 3. Exceptions to the rule	**MESSAGE 2—ON PAYMENT NOTICES** As of November 1, invoices without a PO will be rejected.	**REMINDER 1** As of November 1, invoices without a PO will be rejected.	**REMINDER 2 EFFECTIVE DATE** As of November 1, invoices without a PO will be rejected

Enabling suppliers

Supplier Section
As of April 8

New section on the Olymel website dedicated to suppliers

- Coupa in brief - Olymel L.P.
- Information about Coupa
- Reference guide, documentation, FAQ, training

Training
May

Virtual and self-learning Coupa training

- Tiers 1 & 2: Virtual session
- Tier 3: Training capsule (self-pace) in the Supplier Section

Communications
April to June

Various communications sent to suppliers

- Supplier Section launch, go-live date, next steps
- Invitation to virtual training courses and to view self-pace training
- Announcement of Coupa launch (Go-Live)
- Training reminder, Supplier Section, support contact

Next Steps

Olymel aims to optimize the use of the Coupa platform by its suppliers.

To deepen the understanding of the CSP tool, additional resources will be made available:

- Video capsules for each lesson will be accessible on the supplier space for future reference.
- Q&A sessions will be organized in the days following the Go-live to discuss various issues or questions encountered.

Please note that the Coupa Supplier Portal will not be available before the Go-Live. Olymel will send communications regarding this matter.

For functional support, please communicate with [SupportPartenairesOlymel@OLYMEL.com]

Thank You!