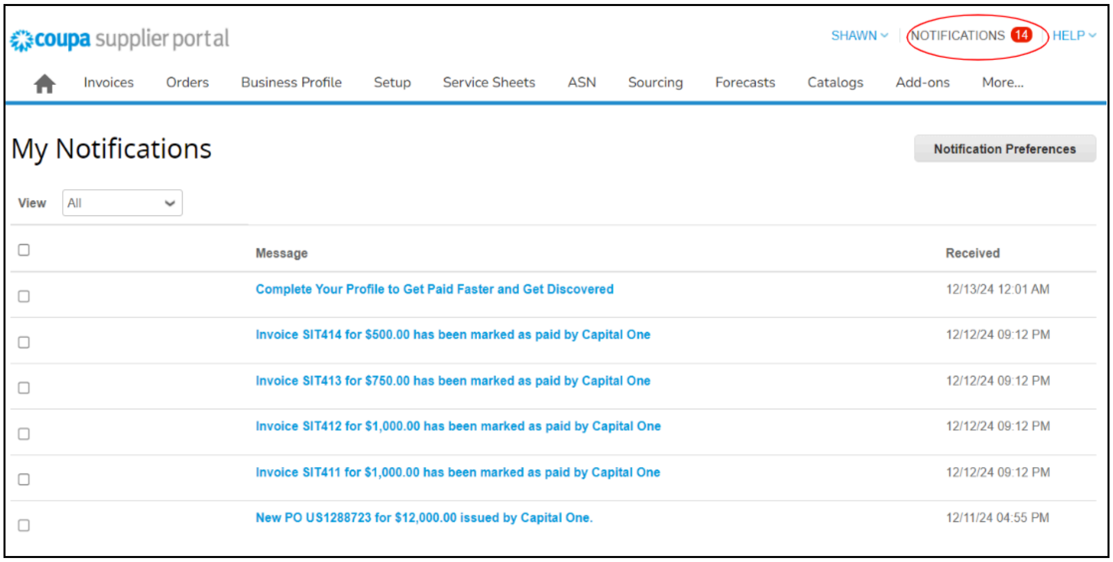
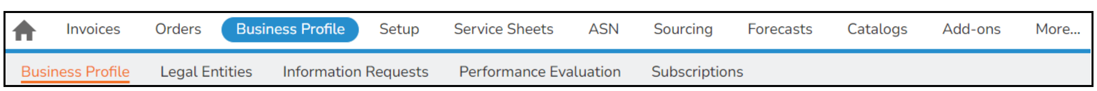
Coupa Supplier Portal (CSP) Overview

This document outlines the functions of the Coupa Supplier Portal (CSP). You'll have access to the CSP once you've set up your Coupa supplier profile.

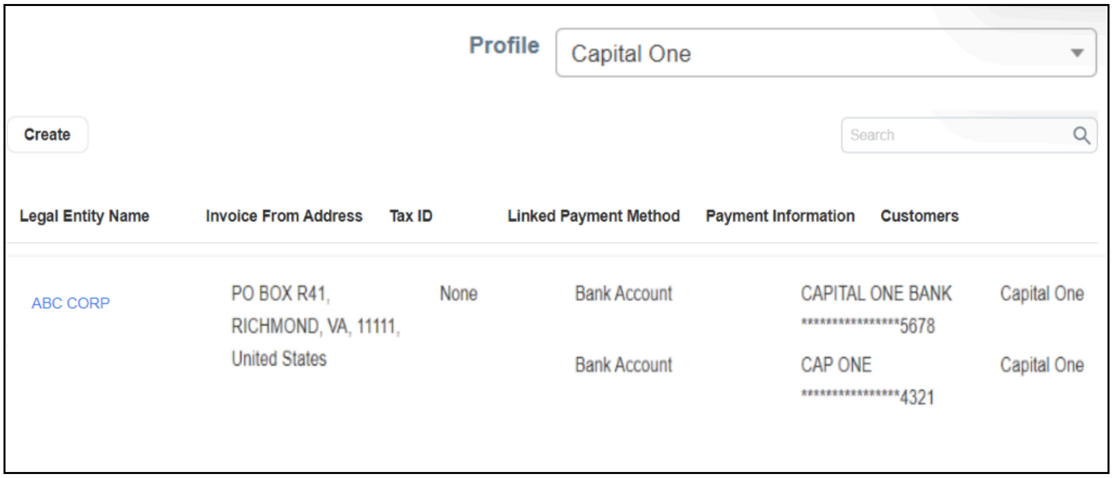
Note: At this time, Capital One does not use the **ASN**, **Service/Time Sheets**, **Catalogs**, **Payments**, **Sourcing**, or **Add-ons** tabs.

<table>
<tr><th>Tab</th><th>Function</th></tr>
<tr><td>Notifications</td><td>


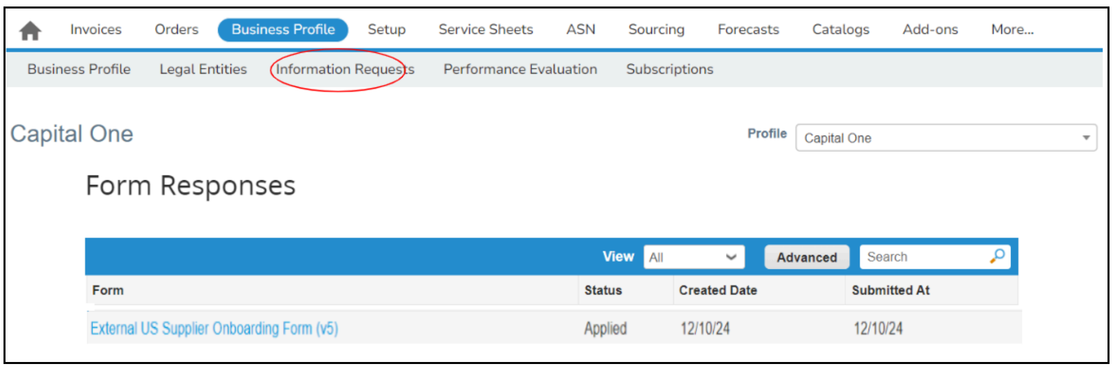
Provides you a view of all notifications in the system.</td></tr>
<tr><td>Profile</td><td>Your Business Profile - Profile information that can be seen by other Companies using Coupa, including company name, address, logo, description of goods and services, and social media profile information.



Legal Entities - The entity created that will be used when submitting invoices</td></tr>
</table>



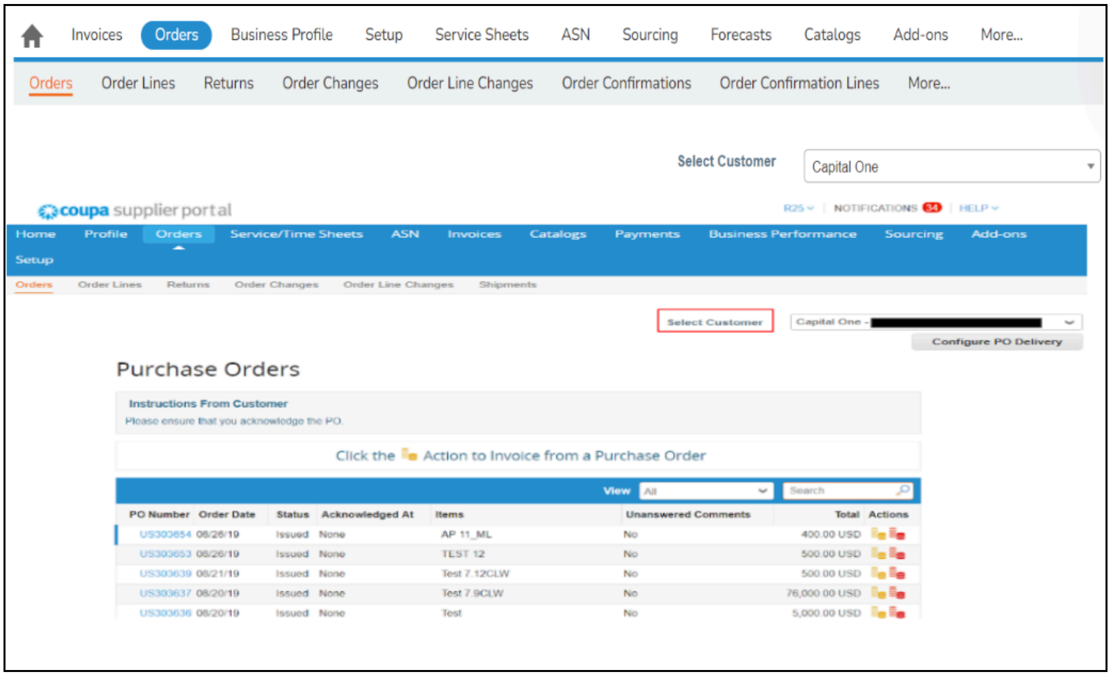
Information Requests - Profile information used to complete the onboarding process with your customer. If you received a Capital One Profile Information Request, you must complete your onboarding using the Information Requests link.



Customer Profile changes that are made after submitting your initial onboarding information will not be received by Capital One. Send your Customer Profile changes to Vendor Maintenance.

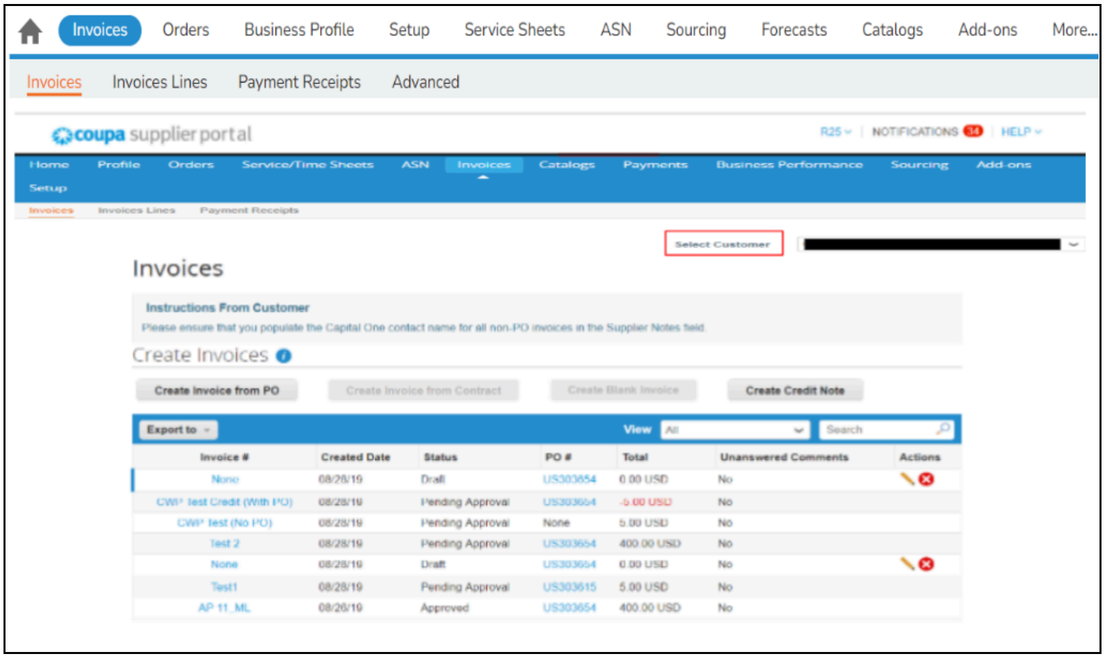
<table>
<tr><th>Tab</th><th>Function</th></tr>
<tr><td>Orders</td><td>Allows you to:

● Review Purchase Orders (POs)
● Create invoices (select the gold coin icons on the right)
● Create credits (select the red coin icons on the right)



Note: Only PO-backed invoices can be submitted through the CSP. To obtain a PO, reach out to your Capital One contact.</td></tr>
</table>

<table>
<tr><th>Tab</th><th>Function</th></tr>
<tr><td>Invoices</td><td>
Allows you to view the status of all invoices created and submitted from the CSP or Supplier Actionable Notification (SAN) email.



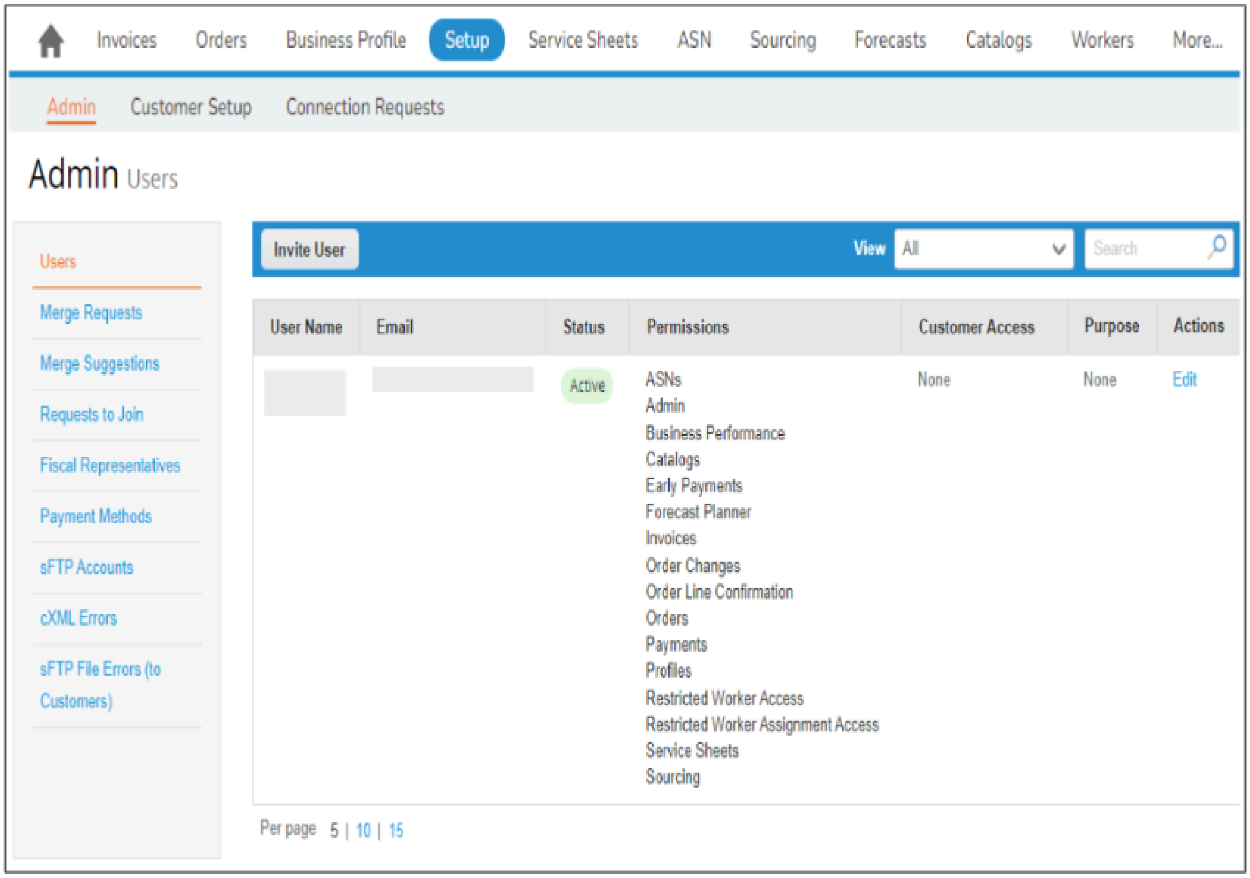
You can use the **Search** bar at the top right of the invoice list to filter the list with a search term, or you can use the **View** drop-down for advanced filtering.
</td></tr>
<tr><td>Setup</td><td>
From the **Setup** tab, you can:

- Invite additional users or edit user permissions for the CSP (see instructions below)
- Manage any merge requests you've sent or received
- Create and manage multiple Remit To Addresses (under **Legal Entity Setup**), which are used to determine the payment location of invoices submitted through the CSP.
</td></tr>
</table>

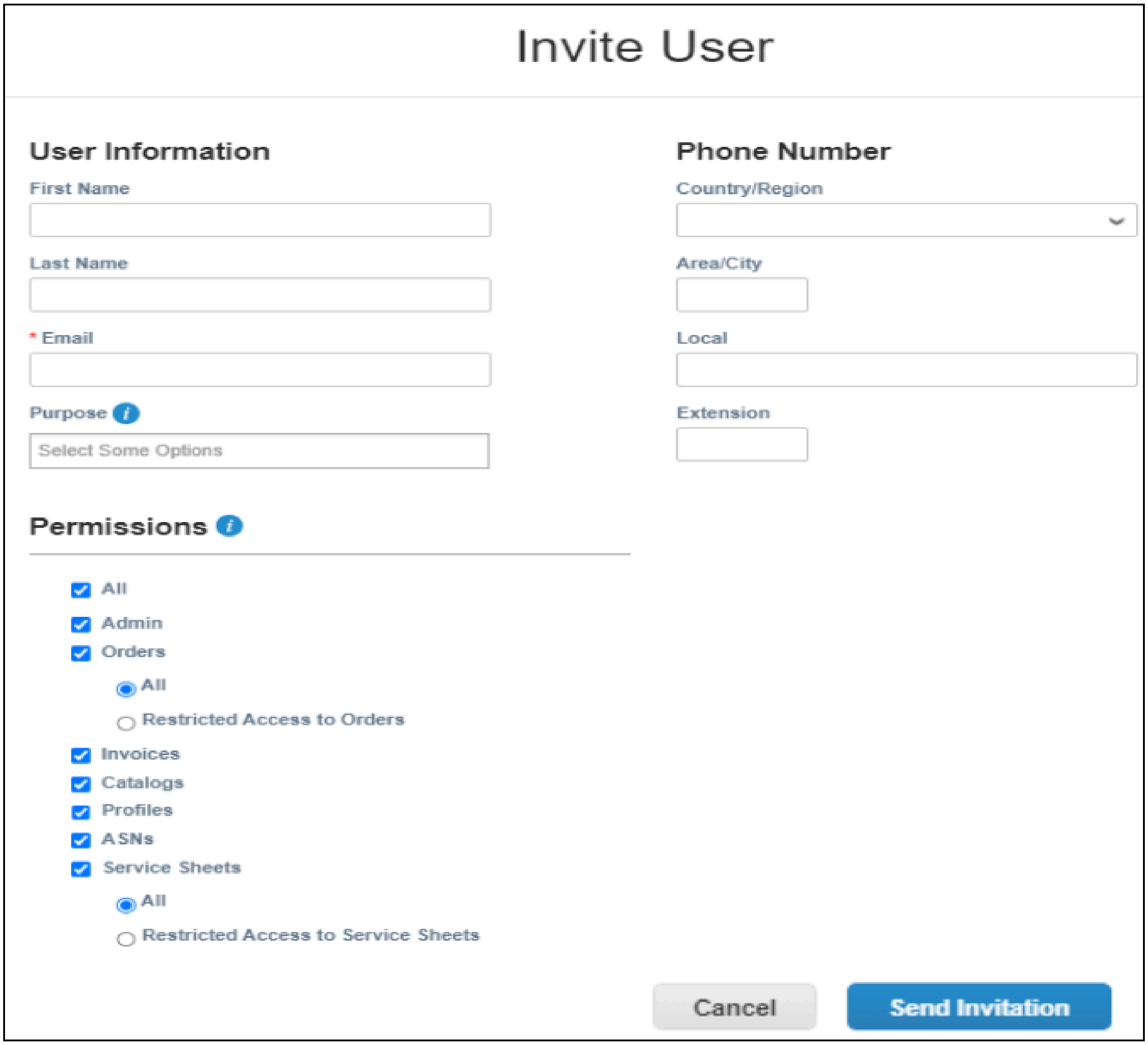
Adding a User in Coupa Supplier Portal (CSP)

To add a user on the Coupa Supplier Portal you need to have admin access. Admins will see the Setup tab at the top of the CSP homepage. If you don't have admin access, work with the admin for your company. If you're not sure who that is, please reach out to the ESM Operations Support Center.

1. From the Setup tab on the CSP homepage, click **Invite User**.



2. The user information fields display. Enter the new user's information, select the **Permissions** you want the user to have and click **Send Invitation.**



The new user will receive an email and will need to accept the invitation to become a user. Once accepted, they will possess the permission access that was granted.

NOTE: There are many permissions available. Here are a few of interest.

Permissions Overview:

Permissions	Permission allows users to:
Setup	Have full access to all CSP functions, including user administration.
Orders	View and work with purchase orders.
Invoices	View and work with invoices.

Catalogs	View and work with catalogs.
Profiles	Modify customer-specific profiles. All users, regardless of permissions, can edit the public profile.
Business Performance	Provides insights into your transactions customers
“Others”	Capital One currently does not utilize the other Permissions: ASN, Service/Time Sheets, Catalogs, Payments, Sourcing, Add-ons

NOTE: Review the Users on the Setup tab to ensure your newly added user has the correct Customer Access.