

Supplier CSP Training Jabil P2P Implementation: Coupa Supplier Portal (CSP)

October 2017

JABIL

Detailed Agenda

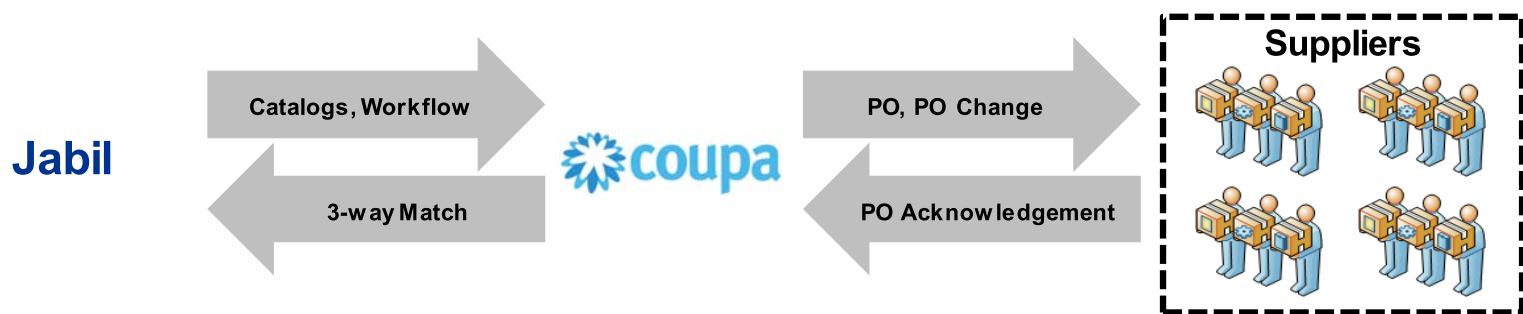
- Introduction to Coupa
 - What is Coupa?
 - How Will You Benefit?
- Connecting to the Coupa Supplier Portal
- Supplier Actionable Notification - Email Flip
 - Receiving and viewing an Order
 - Acknowledging an Order
 - Create Invoice via email
- Coupa Supplier Portal
 - Receiving and viewing an Order
 - Acknowledging an Order
 - Create Invoice
 - Invoice Status
 - Updating the Supplier Profile
- Next Steps

Introduction to Coupa

What is Coupa?

Jabil has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic transactions.

- Coupa is a leading E-Procurement platform, connecting buyers with their suppliers
- “Coupa is an internet based solution capable of accommodating a variety of different systems” (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by Jabil to request indirect materials and services, create and communicate purchase orders, and to receive invoices from suppliers
- The Coupa Supplier Portal (CSP) is free, there is no cost for suppliers



How Will You Benefit?

By working with Jabil electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with Jabil.

- Efficient Invoice Processing (PO Flip)
- Instant visibility into Purchase Order and Invoice Status
- Reduced Manual Paper Transaction Processing



Connecting to the Coupa Supplier Portal

Connection to Jabil via Coupa


It is imperative that all suppliers connect to the Coupa platform to transact with Jabil successfully. Each of the below steps must happen before a supplier can properly interact with Jabil:



Coupa Supplier Portal (CSP) Introduction

The below introduction letter will come from Coupa for Suppliers. Please alert your teams to keep a look out for this invitation and act upon it when it comes in.

Please confirm your email Inbox x Print Share

 **Coupa Supplier Portal** <do_not_reply@supplier-demo.coupahost.com> 11:52 AM (44 minutes ago) ☆ Reply More

to me ▾

KPMG would like to be connected with you on Coupa Supplier Network. You will be able to:

- Manage your company information
- Configure your PO transmission preferences
- Create an online catalog
- View purchase orders
- Create electronic invoices

By participating, suppliers gain access to a low cost, high volume order channel. They increase their order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with their key customers.

You can also find more information here:

Overview: <http://www.coupa.com/e-procurement/innovations/supplier-network>

Getting started guide: <https://success.coupa.com?cid=supplier-getting-started>

Raj Sharma
KPMG

To confirm this request, please click the link below:


<https://supplier-demo.coupahost.com/signup/bb22f3add3dc77f1c8235d6500f747a4b0fb84e0>

One System, Two Interaction Methods

As a supplier, you have two ways that you can electronically interact with Jabil.

Via Email Flip

Create Invoice
Acknowledge PO
Add Comment



Amazon.com
1516 2nd Ave
Seattle, WA 98101
Attn: Allison Livingston
rls.me2+amazon@gmail.com

**Acme, INC.
PURCHASE ORDER**

PO NUMBER: 3387
DATE: 04/17/17
PAYMENT TERMS: Net 30
SHIPPING TERMS: Standard
CURRENCY: USD
CONTRACT
CONTACT: Nanda Halappa
[nandahalappa@kpmg.com](#)

Ship To
Acme, INC.
Jilotepec 10110-34
Ciudad Juarez, Chihuahua
32698
Attn: Nanda Halappa

Bill To
Acme, INC.
28 Nevada Blvd
Laughlin, NV 94301
Attn: Jill Harker

Line	Description	Qty	Unit
1	Swingline Speedpoint Staples B000CD0YW4-1	1	Each
			1 Unit

Please ensure the PO number is included on all invoices.
Standard Terms and Conditions apply per our agreed policy.

Create Invoice
Acknowledge PO
Add Co

Via the CSP

coupa supplier portal
 ALLISON ▾ | NOTIFICATIONS 2 | HELP ▾

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Admin

Orders
Order Lines

Purchase Order #3387

Status: Issued - Sent via Email

Order Date: 04/17/17

Revision Date: 04/17/17

Requester: Nanda Halappa

Email: nandahalappa@kpmg.com

Payment Term: Net 30

* Contract file

* Custom Field 1: None

Attachments: None

Acknowledged

Shipping

Ship-To Address: Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico
Attn: Nanda Halappa

Terms: Standard

Lines

Line	Type	Item	Qty	Unit	Price	Total	Invoiced
1		Swingline Speedpoint Staples	1	Each	3.60	3.60	0.00

Supplier Actionable Notification (Email Flip)

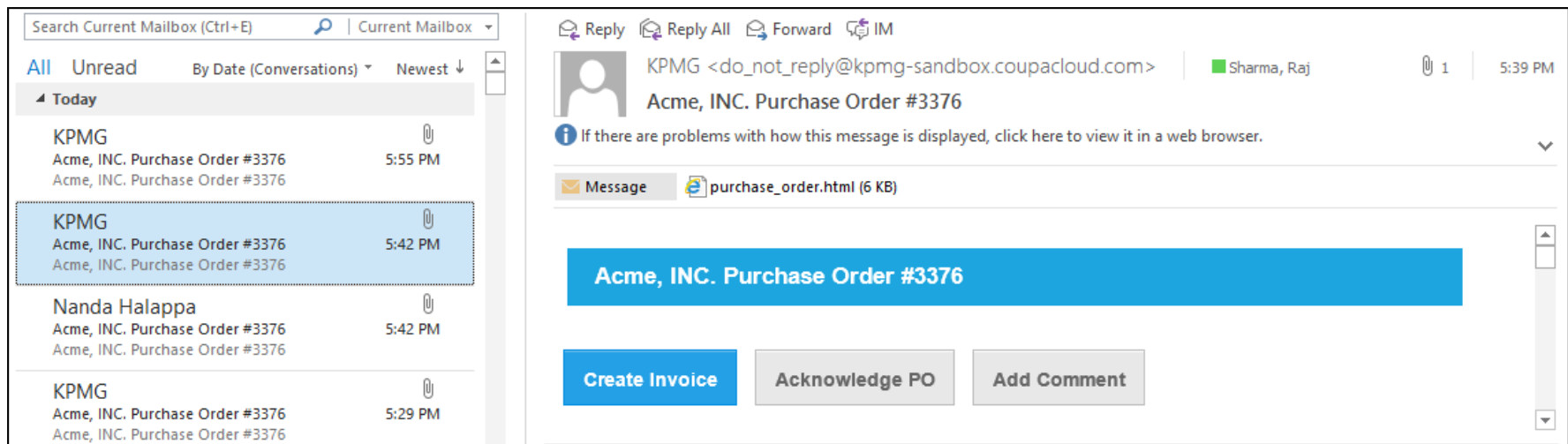
Transactions in Coupa Via Email

- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and invoice against those orders via Email
- As the Supplier you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons so depending on what you click you will be able to Create Invoice, Acknowledge PO or Add Comment to the PO
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



Receive a Purchase Order via Email

- If the Supplier email address is added in the Jabil systems, the PO will be automatically emailed directly to you
- Purchase Orders will show up as **Coupa Notifications** in your mailbox
 - POs will be issued to a PO email address confirmed by the supplier and not to the primary contact email address (unless they are identical).




The screenshot displays an email interface. On the left is a mailbox list with a search bar at the top. The list shows several emails from KPMG and Nanda Halappa, all related to 'Acme, INC. Purchase Order #3376'. The second email from KPMG is selected. The main pane on the right shows the details of this email, including the sender 'KPMG <do_not_reply@kpmg-sandbox.coupacloud.com>', the recipient 'Sharma, Raj', and the subject 'Acme, INC. Purchase Order #3376'. Below the subject is a message icon and the filename 'purchase_order.html (6 KB)'. A large blue banner contains the text 'Acme, INC. Purchase Order #3376'. At the bottom of the message pane are three buttons: 'Create Invoice' (in blue), 'Acknowledge PO', and 'Add Comment'.

Acknowledge a Purchase Order via Email

View the PO information and click on the **Acknowledge PO** to notify Jabil that you have received the purchase order.

[Create Invoice](#) [Acknowledge PO](#) [Add Comment](#)

 **Acme, INC.
PURCHASE ORDER**

Amazon.com
1516 2nd Ave
Seattle, WA 98101
Attn: Allison Livingston
rks.me2+amazon@gmail.com

PO NUMBER: 3387
DATE: 04/17/17
PAYMENT TERMS: Net 30
SHIPPING TERMS: Standard
CURRENCY: USD
CONTRACT
CONTACT: Nanda Halappa
nandahalappa@kpmg.cc

Ship To
Acme, INC.
Jilotepec 10110-34
Ciudad Juarez, Chihuahua
32898
Attn: Nanda Halappa

Bill To
Acme, INC.
28 Nevada Blvd
Laughlin, NV 94301
Attn: Jill Harker

Line	Description	Qty	Unit	Price	Total
1	Swingline Speedpoint Staples B000CD0YW4-1	1	Each	3.60	3.60
				1 Unit	3.60 USD

Please ensure the PO number is included on all invoices.
Standard Terms and Conditions apply per our agreed policy.

[Create Invoice](#) [Acknowledge PO](#) [Add Comment](#)

Notice that you also have the ability to add a comment or create an invoice directly from your email

Acknowledge a Purchase Order via Email

Coupa will open in a new browser tab or window. You will see the message 'Order Acknowledged' at the top of the screen.

Purchase Order #3387

Order acknowledged



Status Issued - Sent via Email

Order Date 04/17/17

Revision Date 04/17/17

Requester Nanda Halappa

Email nandahalappa@kpmg.com

Payment Term Net 30

* **Contract file**

* **Custom Field 1** None

Attachments None

Acknowledged

Shipping


Ship-To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico
Attn: Nanda Halappa

Terms Standard

Create Invoices via Email

To flip this PO into an invoice, click **Create Invoice**.

Create InvoiceAcknowledge POAdd Comment



Acme, INC. PURCHASE ORDER

Amazon.com
1516 2nd Ave
Seattle, WA 98101
Attn: Allison Livingston
rks.me2+amazon@gmail.com

PO NUMBER: 3387
DATE: 04/17/17
PAYMENT TERMS: Net 30
SHIPPING TERMS: Standard
CURRENCY: USD
CONTRACT
CONTACT: Nanda Halappa
nandahalappa@kpmg.com

Ship To
Acme, INC.
Jilotepec 10110-34
Ciudad Juarez, Chihuahua
32008
Attn: Nanda Halappa

Bill To
Acme, INC.
28 Nevada Blvd
Laughlin, NV 94301
Attn: Jill Harker

Line	Description	Qty	Unit	Price	Total
1	Swingline Speedpoint Staples B000CD0YW4-1	1	Each	3.60	3.60
				1 Unit	3.60 USD

Please ensure the PO number is included on all invoices.
Standard Terms and Conditions apply per our agreed policy.

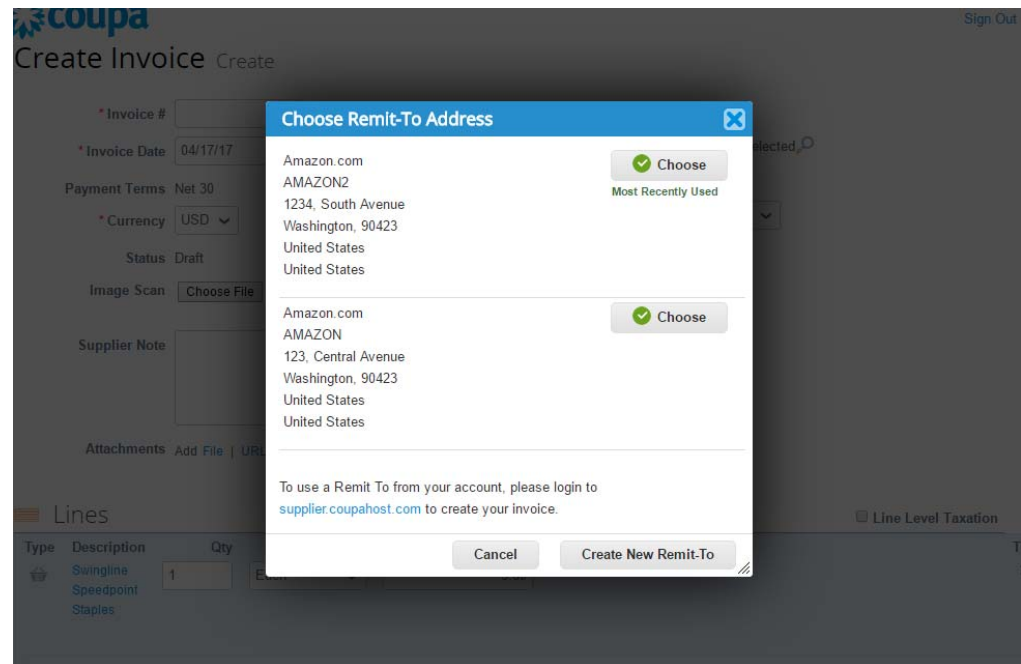
Create InvoiceAcknowledge POAdd Comment

Create Invoices via Email

The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

Note: If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. Or if there is no Remit-To address stored, Coupa will ask you to create one.

- If the correct remit-to address does not appear, click **Create New Remit-To**.



Note that if you create a new address, the invoice will be put “on hold” as the new remit-to address will need to be approved by the Jabil AP team.

Create Invoices via Email

On the **Create Invoice** screen, input the invoice number into the **Invoice #** field.

Note that all other required fields are indicated by an asterisk.

coupa Sign Out

Create Invoice Create

*** Invoice #**

*** Invoice Date** 04/17/17

Payment Terms Net 30

*** Currency** USD

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

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

*** Supplier** Amazon.com

*** Remit-To Address** Amazon.com

AMAZON
123, Central Avenue
Washington, 90423
United States

Supplier Tax ID None

Customer KPMG

*** Bill To Address** 28 Nevada Blvd
Laughlin, NV 94301
United States

Ship To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico

Buyer Tax ID None

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	Total
	Swingline Speedpoint Staples	<input type="text" value="1"/>	Each <input type="text"/>	<input type="text" value="3.60"/>	3.60

Create Invoices via Email

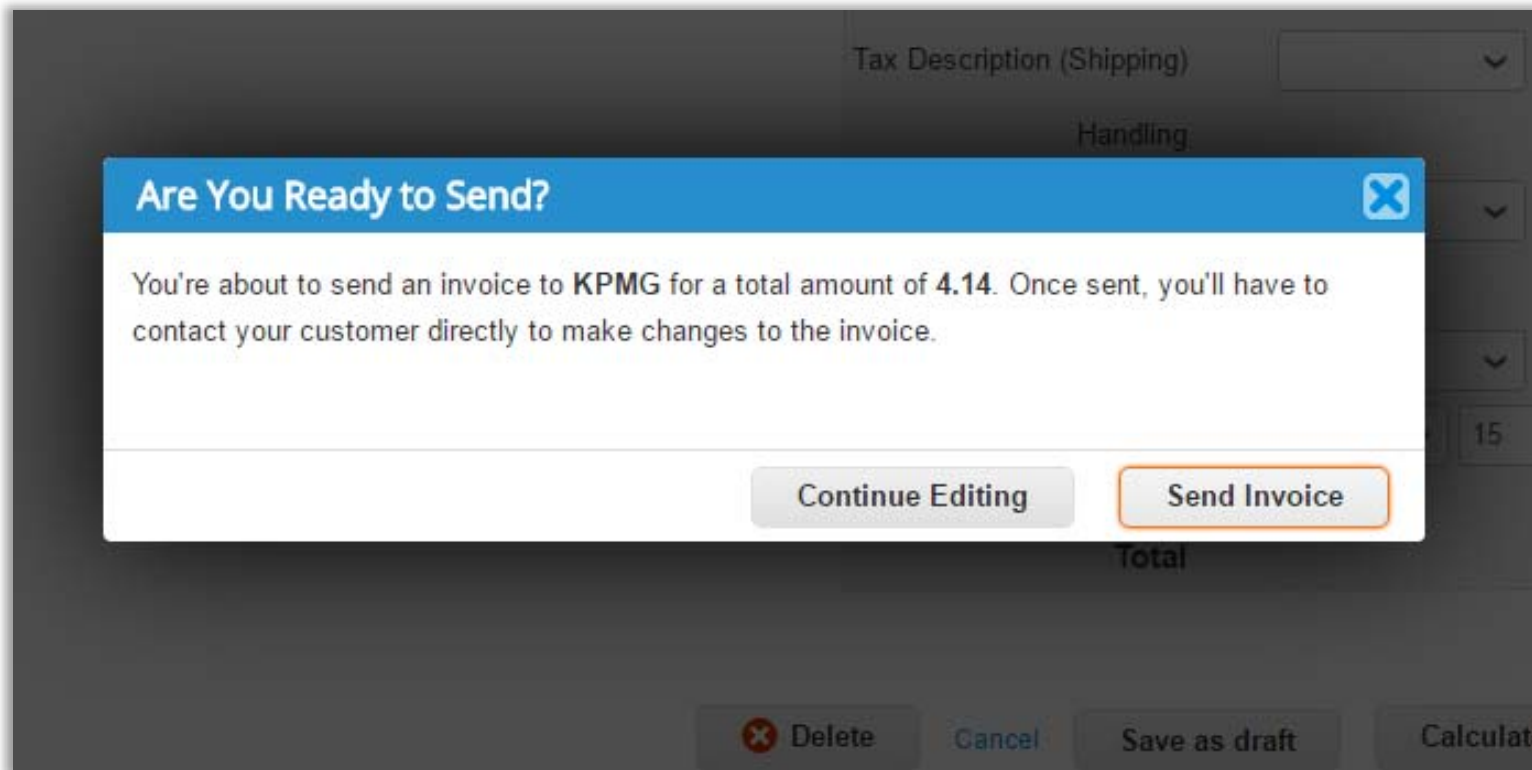
Scroll down to the **Lines** section and ensure all details are accurate, specifically the Price and the Quantity.

- Enter any shipping and handling information.
- If applicable, add any tax in the proper section by one of the following methods:
 - Select a tax code from the **Tax Code** dropdown and click **Calculate**
 - Manually enter a **tax percentage**
 - Manually enter a **tax amount (\$)**
- Enter any comments for Jabil and then click **Add Comment**.

The screenshot displays the Jabil invoice creation interface. At the top, a table lists line items with columns for Type, Description, Qty, UOM, Price, and Total. The first line item is highlighted with a red box around the Qty (1) and Price (3.60) fields. Below this, the PO Line (3387-1), Contract (SF-Marketing-Indirect), and Billing Period (Q4 FY2015) are shown. The main section is titled 'Add Line' and contains a 'Subtotal' of 3.60. Below the subtotal, there are fields for Shipping, Handling, and Misc taxes, each with a dropdown for 'Tax Description' and a percentage field. The 'Tax Description' dropdown for the Misc tax is highlighted with a red box. At the bottom of the tax section, there are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. The 'Calculate' button is highlighted with a red box. Below the tax section, there is a 'Comments' section with a text input field and an 'Add Comment' button.

Create Invoices via Email

After you click Submit, a pop up appears to confirm if you are ready to send the invoice. Click **Send Invoice** to complete the process. Note that once submitted, the invoice cannot be changed.



Coupa Supplier Portal (CSP)

Email and CSP are Linked

- You will be notified of the status of your Purchase Order or Invoice via email.
- You can click **View Online** in the acknowledgement email to check the invoice status.

The image shows an email notification from KPMG regarding an approved invoice. The email text includes the Coupa logo and a 'View Online' button. A blue arrow points from this button to a web interface showing a table of invoices. The table lists invoice details such as ID, date, status, and amount.

Email Content:

KPMG <do_not_reply@kpmg-sandbox.coupacloud.com> | Sharma, Raj | 6:26

Invoice 12345 is Approved to Pay

If there are problems with how this message is displayed, click here to view it in a web browser.

coupa Invoice 12345 is Approved to Pay

Good news,

Your invoice has been approved to pay by your customer, KPMG.

If your customer subsequently marks the invoice as "Paid", you will get an e-mail notification that the invoice is being paid.

If you have any questions you can simply contact your customer through normal channels or enter a comment on the invoice if your customer allows it.

To check the status of the invoice or payment, use the button below:

View Online

Web Interface Table:

View	All	Search
Unanswered Comments		Actions
No		
No		
No		
No		
No		
No		
No		
No		
No		

Per page 15 | 45 | 90

Invoice Against Contract | Create | Credit note

Receive & View Orders

- Regardless of the PO delivery preference set, you will have access to POs within the CSP
- Click **Orders** from the Menu Bar.

The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the top bar, there is a user name "ALLISON" with a dropdown arrow, a "NOTIFICATIONS" button with a red circle containing the number "2", and a "HELP" button with a dropdown arrow. Below this is a blue navigation menu with several items: "Home", "Profile", "Orders" (which is highlighted with a red rectangular box), "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin".

The main content area is divided into two columns. The left column is titled "Amazon.com" and features a globe icon on the left and a list of links on the right: "About", "Industry", "Website", "Established", and "Employees". Below this list is a blue button labeled "Improve Your Profile". Underneath the globe icon, there are sections for "About" and "Public Profile" with a URL: <https://supplier-demo.coupahost.com/suppliers/public/3849>.

The right column is titled "Merge Accounts". It contains a paragraph: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers." Below this is another paragraph: "Not seeing the account you want to merge with? [Click here.](#)".

There are two account entries listed under "Merge Accounts":

- Amazon.com**
1516 2nd Ave
Seattle, WA 98101
United States
jgibson@hayesmanagement.com
Buttons: Request Merge, Remove
- Amazon.com**
1516 2nd Ave
Seattle, WA 98101
United States
kathryn.e.hamlin@accenture.com

Receive & View Orders

- When the page refreshes, **select the applicable PO number** from the list of purchase orders. Or use the Search menu to locate the PO.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and the text "coupa supplier portal". On the right side of the navigation bar, there are links for "ALLISON", "NOTIFICATIONS 2", and "HELP". Below the navigation bar, there is a secondary menu with options: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin". The "Orders" option is currently selected. Below this menu, there is a sub-menu with "Orders" and "Order Lines".

The main content area is titled "Purchase Orders". On the right side of this area, there is a button labeled "Configure PO Delivery". Below the title, there is a table with a blue header. The table has columns: "PO Number", "Order Date", "Status", "Acknowledged", "Items", "Unanswered Comments", "Total", and "Actions". The "PO Number" column is highlighted with a red box, and the value "3387" is visible in the first row. The table also includes a "View" dropdown menu set to "All" and a search box.

PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
3387	04/17/17	Issued	04/17/17	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
3386	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
3385	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
2685	09/30/12	Issued	None	250 Each of Monogrammed Timbuk2 bags for conference giveaways	No	32,250.00 USD	
2664	05/31/12	Issued	None	5 Each of Amazon.com: Apple iPod touch 16 GB (2nd Generation) LATEST MODEL: Electronics 12 Each of Amazon.com: Olympus Stylus Tough-8000	No	6,174.63 USD	

Acknowledge Orders

- The page refreshes to display the PO details and shipping address.
- Click the **Acknowledged** checkbox to notify customer you have received the PO.
- You can print the PO by clicking **Print View**.

Purchase Order #3387

Status Issued - Sent via Email

Order Date 04/17/17

Revision Date 04/17/17

Requester Nanda Halappa

Email nandahalappa@kpmg.com

Payment Term Net 30

* Contract file

* Custom Field 1 None

Attachments None

Acknowledged

Shipping

Ship-To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico
Attn: Nanda Halappa

Terms Standard

Lines

Line	Type	Item	Qty	Unit	Price	Invoiced
1		Swingline Speedpoint Staples	1	Each	3.60	0.00

Delivery Date

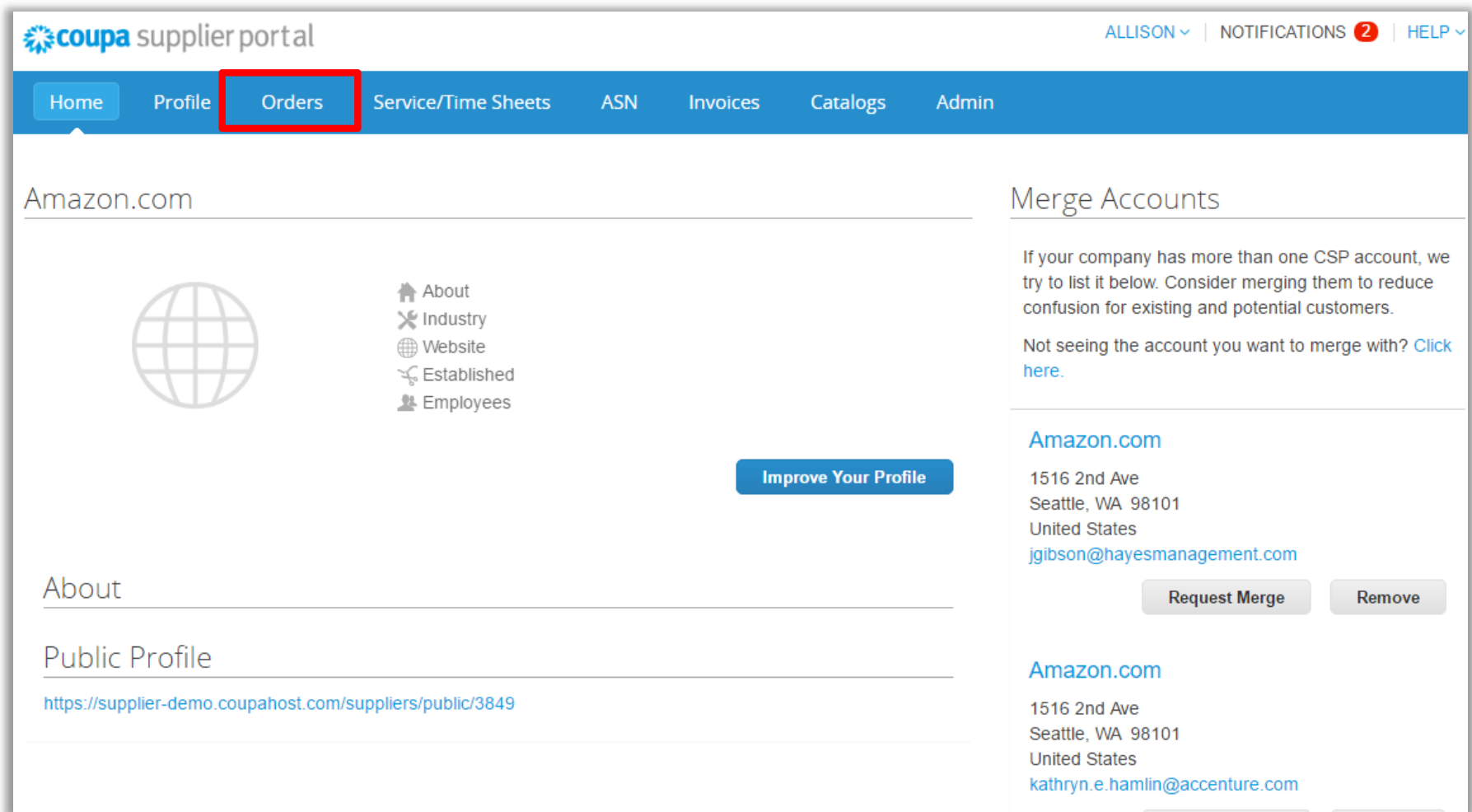
Total 3.60 USD

Create Invoice Save **Print View**

Notice that you also have the option to Create an Invoice from this screen.

Create Invoices

- Via the CSP you can create invoices directly from POs, often referred to as “flipping the PO”
- Click **Orders** from the Menu Bar.



The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the top bar, there is a user name "ALLISON" with a dropdown arrow, a "NOTIFICATIONS" button with a red circle containing the number "2", and a "HELP" button with a dropdown arrow. Below this is a blue navigation menu with several items: "Home", "Profile", "Orders" (which is highlighted with a red rectangular box), "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin".


The main content area is divided into two columns. The left column is titled "Amazon.com" and features a globe icon on the left and a list of links on the right: "About", "Industry", "Website", "Established", and "Employees". Below this list is a blue button labeled "Improve Your Profile". Underneath, there are sections for "About" and "Public Profile" with a URL: <https://supplier-demo.coupahost.com/suppliers/public/3849>.

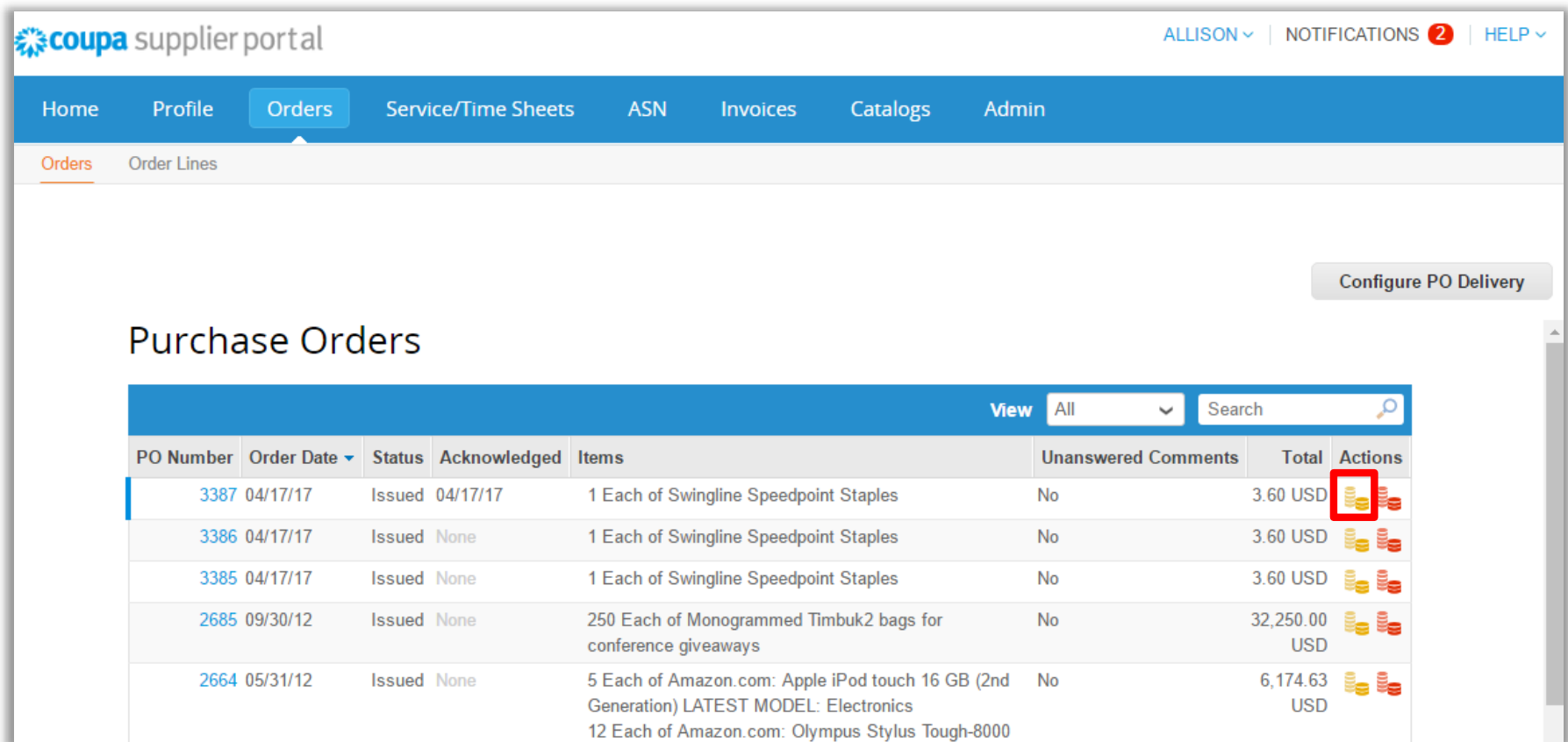
The right column is titled "Merge Accounts". It contains a paragraph: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers." Below this is another paragraph: "Not seeing the account you want to merge with? [Click here.](#)".

There are two account entries listed under "Merge Accounts":

- Amazon.com**
1516 2nd Ave
Seattle, WA 98101
United States
jgibson@hayesmanagement.com
Buttons: Request Merge, Remove
- Amazon.com**
1516 2nd Ave
Seattle, WA 98101
United States
kathryn.e.hamlin@accenture.com






Create Invoices

- Find the PO you would like to flip into an invoice.
- Within that PO row, under the **Actions** column, select the yellow coin stack icon  to flip the PO into an invoice.



The screenshot displays the Coupa Supplier Portal interface. At the top, the user is logged in as ALLISON, with a notification badge showing 2 notifications. The navigation menu includes Home, Profile, Orders (selected), Service/Time Sheets, ASN, Invoices, Catalogs, and Admin. Below the navigation, there are links for Orders and Order Lines, and a 'Configure PO Delivery' button.

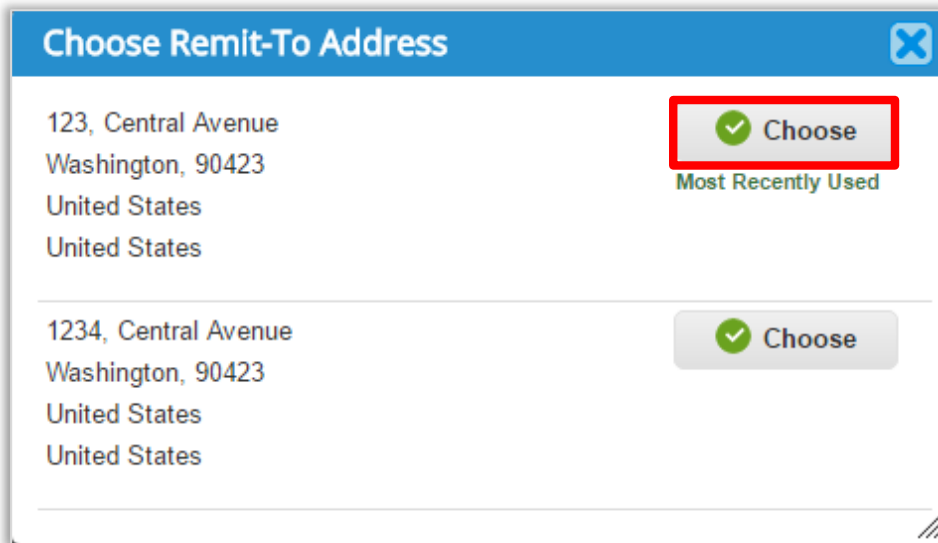
Purchase Orders

PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Actions
3387	04/17/17	Issued	04/17/17	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
3386	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
3385	04/17/17	Issued	None	1 Each of Swingline Speedpoint Staples	No	3.60 USD	
2685	09/30/12	Issued	None	250 Each of Monogrammed Timbuk2 bags for conference giveaways	No	32,250.00 USD	
2664	05/31/12	Issued	None	5 Each of Amazon.com: Apple iPod touch 16 GB (2nd Generation) LATEST MODEL: Electronics 12 Each of Amazon.com: Olympus Stylus Tough-8000	No	6,174.63 USD	

Create Invoices

- The page refreshes to display the create invoice screen.
- The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored, Coupa will ask you to create one.






If the correct Remit-To Address does not appear and you would like to add that address, close the pop-up, save the invoice as a draft and then add a new Remit-To address to your profile.

Note: *If you submit an invoice with a new Remit-To address, the invoice will be put on hold until the new address is approved by the Jabil AP team. When you submit the invoice, you will receive a message saying that it is on hold.*

Create Invoices

- On the **Create Invoice** screen, input the **Invoice #** and **Invoice Date**. Note that required fields are indicated with asterisks.

Create Invoice Create

* Invoice #	<input type="text" value="KP20170417-2"/>	* Supplier	Amazon.com
* Invoice Date	<input type="text" value="04/17/17"/> 	* Remit-To Address	Amazon.com  123, Central Avenue Washington, 90423 United States
Payment Terms	Net 30	Supplier Tax ID	None
* Currency	<input type="text" value="USD"/> 	Customer	KPMG
Delivery Number	<input type="text"/>	* Bill To Address	28 Nevada Blvd Laughlin, NV 94301 United States
Status	Draft	Ship To Address	Jilotepec 10110-34 32698 Ciudad Juarez Chihuahua Mexico
Image Scan	<input type="button" value="Choose File"/> No file chosen	Buyer Tax ID	None
Supplier Note	<input type="text"/>		
Attachments	Add File URL Text		

Create Invoices

As you scroll down the page, in the Lines section you will find more fields to input information.

For a Goods PO:

- Enter a price into the **Price** field.
- Enter the quantity in the **Quantity** field.

Type	Description	Qty	UOM	Price	Total
	Swingline Speedpoint Staples	<input type="text" value="1"/>	Each <input type="text"/>	<input type="text" value="3.60"/>	3.60

PO Line	Contract	Billing
3386-1	<input type="text"/>	Saint Louis-Operations-Indirect

Tags None

[+ Add Line](#)

Subtotal	3.60
Shipping	<input type="text"/>
Tax Description (Shipping)	<input type="text"/> <input type="text"/> % <input type="text" value="0.000"/>

Create Invoices

For a Services PO:

- Enter a price in the **Price** field. Since it is a Services only PO, only the amount is required.

1	Type	Description	Price	Total
	Amt ▾	Warranty Repair Services	1,200.00	1,200.00

PO Line Contract
None ▾

Tags None

Add Line

Subtotal	1,200.00
Shipping	<input type="text"/>
Tax Description (Shipping)	<input type="text"/> ▾ <input type="text"/> % <input type="text"/> 0.000

Create Invoices

- Enter any shipping and handling information.
- Enter any tax information
 - If applicable, add any tax in the proper section by one of the following methods:
 - Select a tax code from the **Tax Code** dropdown and click Calculate.
 - Manually enter a **tax percentage**.
 - Manually enter a **tax amount (\$)**

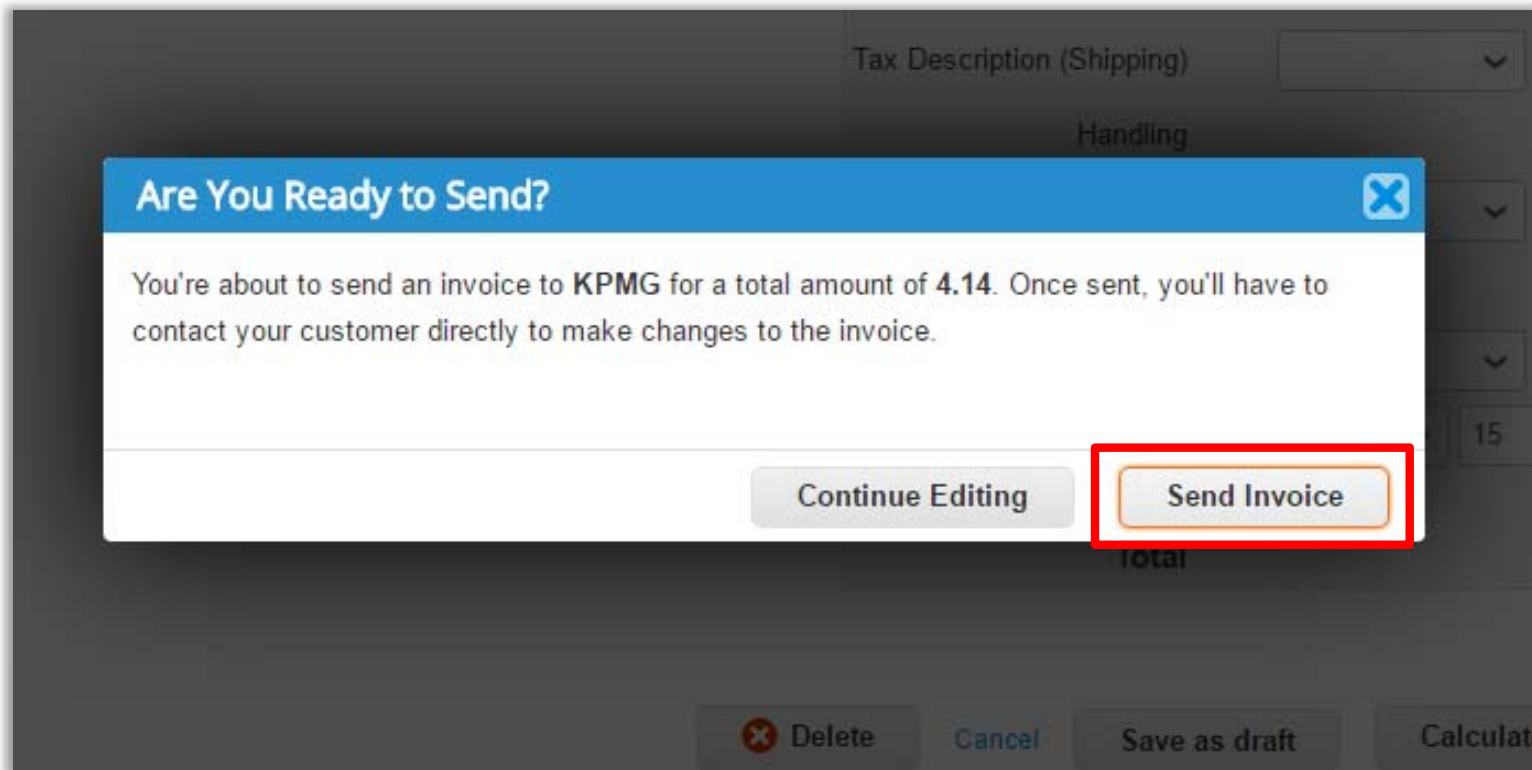
[+ Add Line](#)

Subtotal				3.60
Shipping				<input type="text"/>
Tax Description (Shipping)	<input type="text"/>	<input type="text"/>	%	0.000
Handling				<input type="text"/>
Tax Description (Handling)	<input type="text"/>	<input type="text"/>	%	0.000
Misc				<input type="text"/>
Tax Description (Misc)	<input type="text"/>	<input type="text"/>	%	0.000
Tax Description	<input type="text"/>	15	%	0.54 +
Total Tax				0.54
Total				4.14

[✖ Delete](#) [Cancel](#) [Save as draft](#) [Calculate](#) [Submit](#)

Create Invoices

- Before submitting, a pop-up window will appear to confirm.
 - Click **Send Invoice** when you are ready to submit.
 - Any invoice changes after invoice submission must be made directly through Jabil.
 - If you wish to go back to edit, click **Continue Editing**.



Create Invoices

- After submitting, the page will refresh to display the invoice is processing.
Note: *If you submitted the invoice with a new Remit-To address, the status will display as 'On Hold.'*
- To check the status of the invoice, from the home page, click the invoice hyperlink in the menu bar.

Invoices

Amazon.com invoice #KP20170417-02 is processing ✕


Invoice #	Created Date ▾	Status	PO #	Total	Unanswered Comments	Actions
KP20170417-02	04/17/17	Processing	3387	3.60	No	
KP20170417-2	04/17/17	Processing	3387	3.60	No	

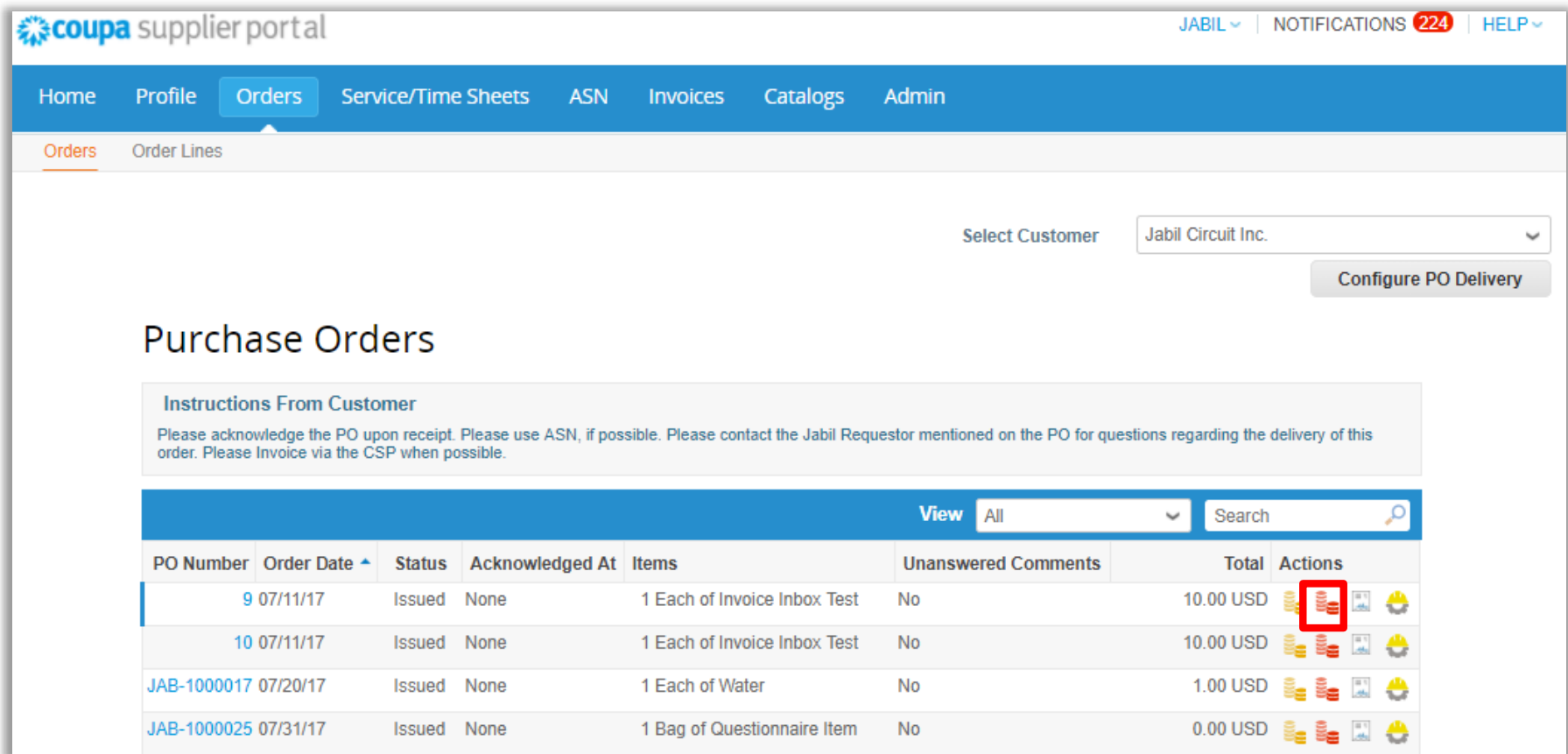
- After the invoice is approved and matched with the PO, the invoice will be paid according to Jabil's standard payment terms, or to the payment terms contractually agreed upon between Jabil and the supplier. Payment details will be reflected in Coupa and the CSP.

Invoice Status

- A supplier can view the following invoice statuses in the CSP:
 - Draft – Draft invoice that has not yet been submitted
 - Processing – Invoice that is between invoice being submitted by the Supplier and the submission being recorded in Jabil's instance
 - Pending Approval – Invoice undergoing any Jabil-internal process to allow final approval. This could be pending receipt or pending approval.
 - Disputed – Invoice that is currently being disputed by the business or AP
 - Approved – Invoice that is approved and ready for payment as per the pay terms or immediately if overdue
 - Voided - Invoice voided after being fully approved and processed





Create Credit Notes

- Find the PO you would like to create a Credit Note.
- Within that PO row, under the **Actions** column, select the red coin stack icon  to create the Credit Note.




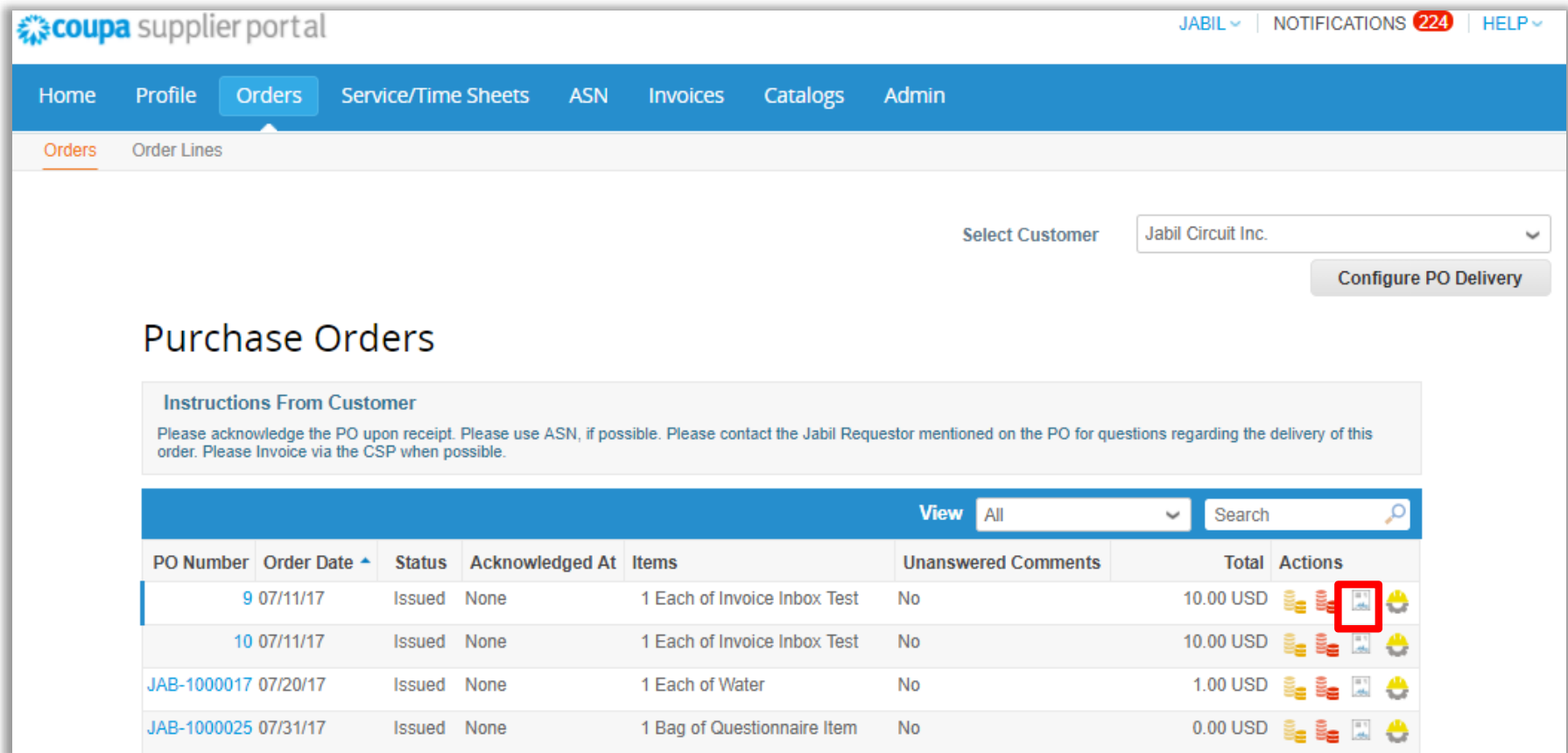
The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Admin'. The 'Orders' tab is selected. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Jabil Circuit Inc.' and a 'Configure PO Delivery' button. The main content area is titled 'Purchase Orders' and contains an 'Instructions From Customer' box with the following text: 'Please acknowledge the PO upon receipt. Please use ASN, if possible. Please contact the Jabil Requestor mentioned on the PO for questions regarding the delivery of this order. Please Invoice via the CSP when possible.'

Below the instructions is a table of Purchase Orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The first two rows of the table have a red coin stack icon in the Actions column, which is highlighted with a red box.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
9	07/11/17	Issued	None	1 Each of Invoice Inbox Test	No	10.00 USD	
10	07/11/17	Issued	None	1 Each of Invoice Inbox Test	No	10.00 USD	
JAB-1000017	07/20/17	Issued	None	1 Each of Water	No	1.00 USD	
JAB-1000025	07/31/17	Issued	None	1 Bag of Questionnaire Item	No	0.00 USD	

Create ASN

- Find the PO you would like to create an Advance Ship Notice.
- Within that PO row, under the **Actions** column, select the Flip to ASN icon  to submit an Advance Ship Notification.



coupa supplier portal

JABIL | NOTIFICATIONS 224 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Admin









Orders Order Lines

Select Customer Jabil Circuit Inc.

Purchase Orders

Instructions From Customer
Please acknowledge the PO upon receipt. Please use ASN, if possible. Please contact the Jabil Requestor mentioned on the PO for questions regarding the delivery of this order. Please Invoice via the CSP when possible.

View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
9	07/11/17	Issued	None	1 Each of Invoice Inbox Test	No	10.00 USD	 
10	07/11/17	Issued	None	1 Each of Invoice Inbox Test	No	10.00 USD	 
JAB-1000017	07/20/17	Issued	None	1 Each of Water	No	1.00 USD	 
JAB-1000025	07/31/17	Issued	None	1 Bag of Questionnaire Item	No	0.00 USD	 

Update Profile Settings

- Available once you click the emailed link and sign-up for the CSP.
- Click **Profile** from the Menu Bar.

The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". At the top right, it displays "ALLISON" with a dropdown arrow, "NOTIFICATIONS" with a red circle containing the number "2", and "HELP" with a dropdown arrow. Below this is a blue navigation bar with the following menu items: "Home", "Profile" (highlighted with a red box), "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin".

The main content area is divided into two columns. The left column is titled "Amazon.com" and features a globe icon on the left and a list of profile fields on the right: "About", "Industry", "Website", "Established", and "Employees". A blue button labeled "Improve Your Profile" is positioned at the bottom right of this section. Below the profile fields, there are sections for "About" and "Public Profile" with the URL <https://supplier-demo.coupahost.com/suppliers/public/3849>.

The right column is titled "Merge Accounts" and contains the following text: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers." Below this, it asks "Not seeing the account you want to merge with? [Click here.](#)". There are two account entries listed, both for "Amazon.com". The first entry shows the address "1516 2nd Ave, Seattle, WA 98101, United States" and the email "jgibson@hayesmanagement.com", with "Request Merge" and "Remove" buttons. The second entry shows the same address and the email "kathryn.e.hamlin@accenture.com".

Update Profile Settings

Edit Company Info

To start, complete your **Public Profile**:

- Click **Profile** from the Menu Bar.
- Click **Edit Profile**.
- **Enter your company information** into the applicable fields.
- Required fields are marked with an asterisk.
- Click **Save** when finished.

Note: When enabled for a given customer, a user can access all POs and create invoices for that customer.

Add Remit To Address

To add new Remit To addresses:

- Click the **Admin** from the Menu Bar and then the **E-Invoicing Setup** tab at the left.
- Click **Add Legal Entity** button to get started.

Add Users

Allow additional users access to your supplier account to perform all tasks.

- Click the **Admin** from the Menu Bar and then the **User** tab at the left and click **Invite User**.
- **Enter the employee's email address** in the text box provided and **click Send Invitation**.
- You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
- You can delete a user by clicking the Delete icon.

Next Steps

Next Steps for CSP Enablement

- Make sure to accept the Coupa Supplier Portal email invite.
 - Update all profile and admin information in the CSP as soon as your connected account is created.
- Align with your Accounts Receivable team.
 - Forward this deck onto A/R and include in any follow-up calls as needed.

Wrap Up

Key Points

- Coupa centralizes Jabil's procure to pay processes and practices and provides our strategic supplier relationships several benefits
 - You are able to view invoice payment status online
- Suppliers have expanded online capabilities: manage catalogs and pricing, receive/acknowledge purchase orders, send invoices online, create hosted catalogs (if enabled on CSP), and check the status of their payment
- Supplier expectations: Working online (no paper) and ensuring a PO is referenced on each invoice
 - Invoices are automatically paid (according to established payment terms) when the purchase order amount equals the amount received and invoice received; no further action required by Jabil colleagues (ensuring timely payment).



Thank you!

JABIL