

FUSION



COUPA TRAINING

Coupa Supplier Portal (CSP)

GLENCORE

03

Navigation and use of the portal

GLENCORE



3.1 NAVIGATION AND USE OF THE SUPPLIER PORTAL

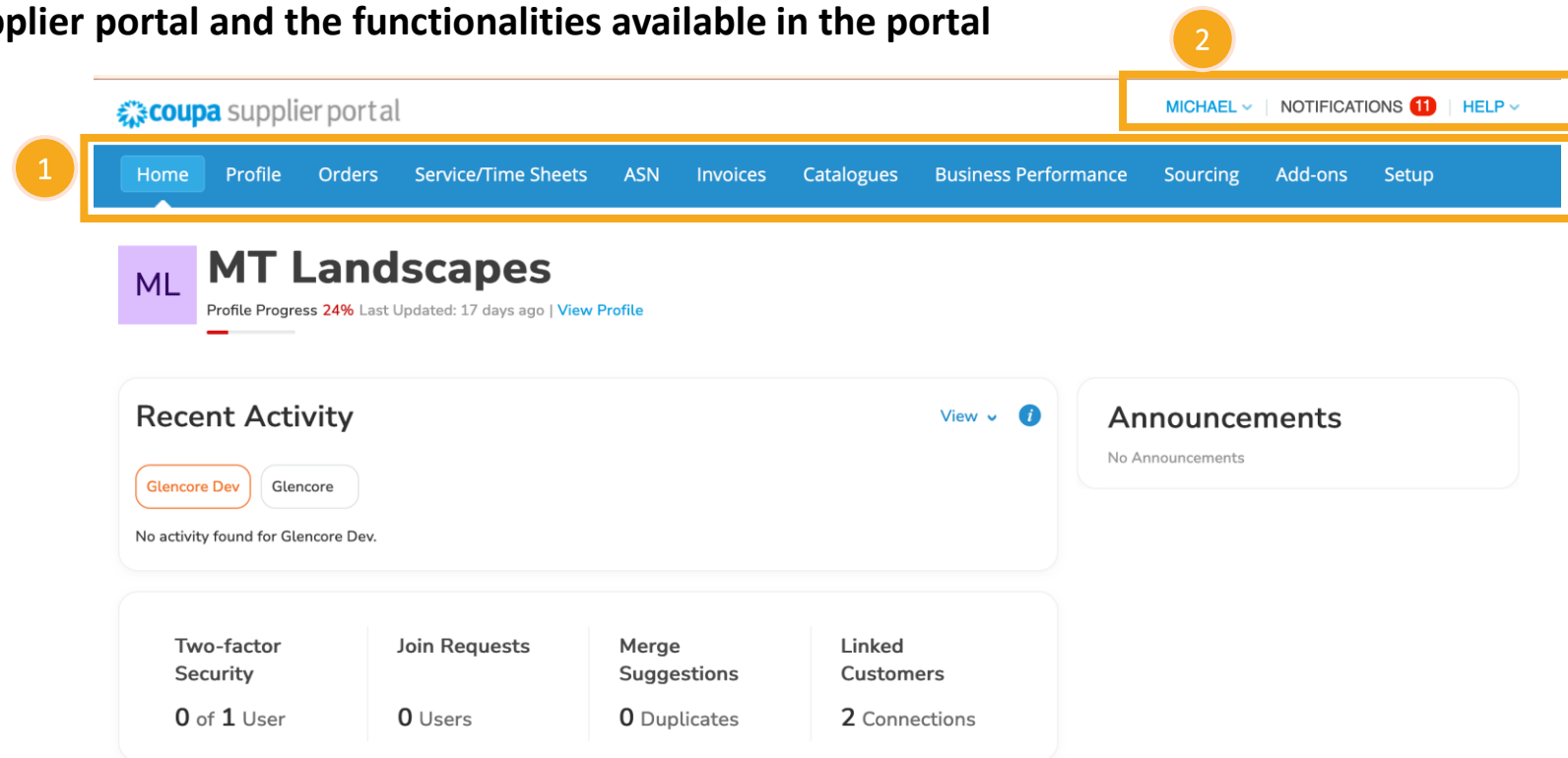
In this section you will learn how to use the supplier portal and the functionalities available in the portal

1 At the top you will find the menu or the options available within the portal.

2 On the upper right-hand side is where you can manage the platform, change passwords, manage notifications and there is also a help option available.



NOTE: If you interact with more than one client in Coupa, you will find them in the recent activity section. To work with Glencore, select the one that refers to Glencore.



1

2

coupa supplier portal

MICHAEL | NOTIFICATIONS 11 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

ML **MT Landscapes**
Profile Progress 24% Last Updated: 17 days ago | [View Profile](#)

Recent Activity [View](#) ⓘ

Glencore Dev Glencore

No activity found for Glencore Dev.

Announcements
No Announcements

Two-factor Security	Join Requests	Merge Suggestions	Linked Customers
0 of 1 User	0 Users	0 Duplicates	2 Connections

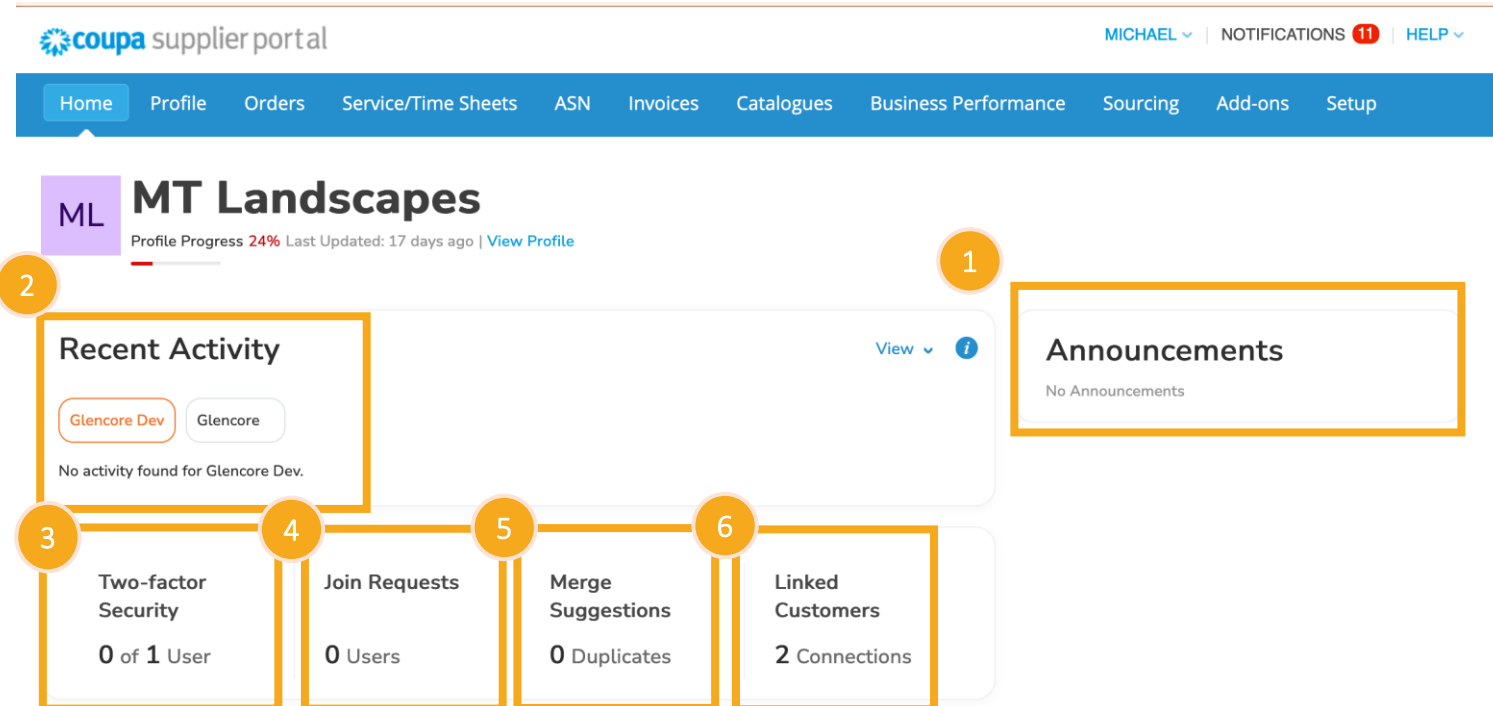
In this section you will learn how to view the functionalities of the home tab

- 1 Announcements section where Glencore will be informing about new developments.
- 2 Recent activity will be listed here
- 3 Two-factor security information will be displayed here
- 4 Join requests will be displayed here
- 5 Merge suggestions will be displayed here
- 6 If you interact with more than one customer on the platform, you can click here to view them.

Glencore Alloys will be with Prefix – **GA30000**
Glencore Coal will be with Prefix – **GC31111**
Glencore Zinc will be with Prefix – **GZ13333**



NOTE: The help option is directly with Coupa, at your disposal you will find help material as support.



coupa supplier portal

MICHAEL | NOTIFICATIONS 11 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

ML **MT Landscapes**
Profile Progress 24% Last Updated: 17 days ago | View Profile

Recent Activity View ⓘ
Glencore Dev Glencore
No activity found for Glencore Dev.

Two-factor Security
0 of 1 User

Join Requests
0 Users

Merge Suggestions
0 Duplicates

Linked Customers
2 Connections

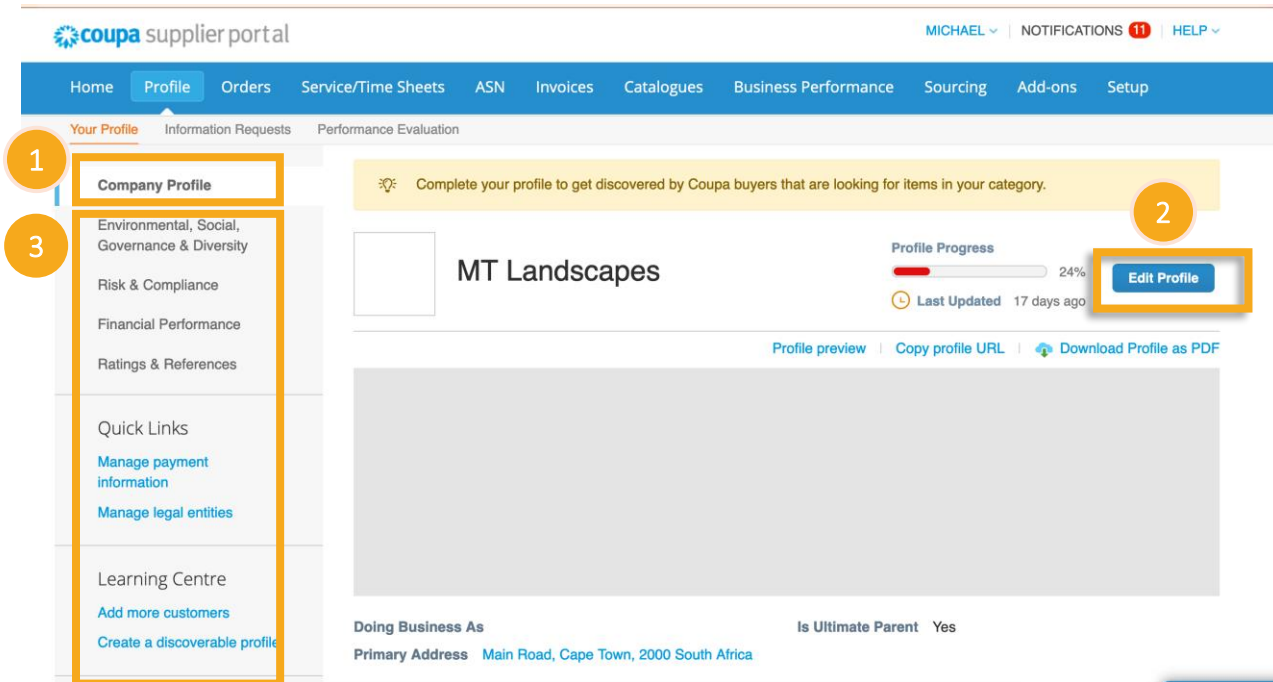
Announcements
No Announcements

This section corresponds to the company profile where you can update your company's information

- 1 Company Profile
- 2 To complete and edit the information, select the edit profile option at the bottom right.
- 3 Additional information can be completed by clicking on the relevant sections



NOTE: This information refers to your profile as a company (not Glencore specific), you have many options to update and complete your profile.



The screenshot displays the Coupa Supplier Portal interface. At the top, the user is identified as MICHAEL with 11 notifications and a help option. The main navigation bar includes Home, Profile (selected), Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. Below this, a sub-navigation bar shows 'Your Profile', 'Information Requests', and 'Performance Evaluation'. The 'Your Profile' section is expanded to show a sidebar with the following options: Company Profile (highlighted with callout 1), Environmental, Social, Governance & Diversity, Risk & Compliance, Financial Performance, Ratings & References, Quick Links (with sub-links for Manage payment information and Manage legal entities), and Learning Centre (with sub-links for Add more customers and Create a discoverable profile). The main content area features a yellow banner: 'Complete your profile to get discovered by Coupa buyers that are looking for items in your category.' Below this is a profile card for 'MT Landscapes' with a progress bar at 24% and a 'Last Updated 17 days ago' timestamp. An 'Edit Profile' button (highlighted with callout 2) is located at the bottom right of the card. Below the card are links for 'Profile preview', 'Copy profile URL', and 'Download Profile as PDF'. At the bottom of the page, it shows 'Doing Business As' and 'Is Ultimate Parent' (Yes), along with the 'Primary Address' as 'Main Road, Cape Town, 2000 South Africa'.

3.4 PROFILE TAB

In this section you will find all the information you need to update your profile

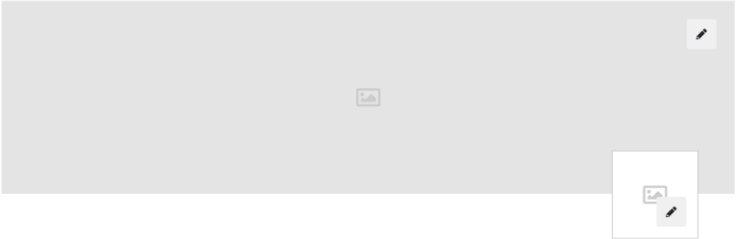
- 1 In the edit profile section you will find general information about your company to complete.
- 2 In this section you will find company details such as address and contacts.
- 3 When done, click Save changes



NOTE: The fields marked with an asterisk are mandatory, the others are required to have an updated profile. The legal entity field is related to your company.

1

Company Profile



* Company Name ... Doing Business As i Is Ultimate Parent Yes No

2

Primary Address

Address line Address line 2 City


State Postcode Country/Region

Primary Contact i

* First Name * Last Name

* Email Role

Preferred Phone Mobile number

Work number Photograph 

Public

[+ Add another contact](#)

3

Cancel

Save and go to Next


Save changes


3.5 ORDERS TAB

This section corresponds to all the purchase orders you have received from Glencore


1 In the orders tab you will be able to see the history of purchase orders, the status, date and a short description.

2 Section to create invoices and credit notes

a The icon  refers to create an invoice

b The icon  refers to create a credit note

3 To view the details of the order, click on the order number you wish to review

 Action to Invoice from a Purchase Order'." data-bbox="422 250 970 794"/>

coupa supplier portal

PAUL | NOTIFICATIONS 61 | HELP


Home **1** Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup







Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer Glencore Dev

Configure PO Delivery

Purchase Orders

Click the  Action to Invoice from a Purchase Order

Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
342337	8/02/21	Issued	None	2 Year of Service	No	20.00 ZAR		 
342335	07/30/21	Issued	None	10 Hour of SIT - C005	No	5.00 ZAR		 
342334	07/30/21	Issued	None	3 Each of SIT - C002	No	18.00 ZAR		 

In this section you can review the information contained in a purchase order

- 1 Once you have clicked on the Purchase Order number you wish to review, you will find the reference number and a description of the order.
- 2 The address associated to the purchase order will be visible under the Shipping section
- 3 Lines or items that are part of the purchase order will be visible under the Lines section
- 4 Options available to you for processing the purchase order are located below



NOTE: The acknowledged option allows you to accept the supply and/or provision of the required goods/services to Glencore.

Purchase Order #342337

1 Status Issued - Sent via Email

Order Date 08/02/21

Revision Date 08/02/21

Requester GC Buyer 1

Email GCBuyer1@glencore.com

Payment Term WL01 - 12 days net

Buyer Paul Francia

Purchasing Flag None

Attachments None

Acknowledged

Assigned to

2 Shipping

Ship-To Address 39 Worley Parsons 3rd Floor
Melrose Blvd Melrose Arch
2198
South Africa
Location Code: 0100
Attn: GC Buyer 1

Terms CFR - Costs and freight

Shipment Tracking + Add

No shipment tracking.

3 Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Service	2	Année / Year / Años (annum)	10.00	20.00	0.00

* Need By	Part Number	Manufacturer Name	Manufacturer Part Number	Item Type	Incoterms	Location	Additional Item Text
08/31/21	None	None	None	Services	None	None	None

Per page 15 | 45 | 80

4 Total ZAR 20.00

Create Invoice Save Print View

In this section you can review the additional options available in the orders tab

- 1 Order lines: in this section you will find the history of order lines associated to purchase orders. You will be able to export them to Excel to keep track of them.
- 2 Purchase order changes: in this section you will find the history of changes made to purchase orders.



NOTE: Suppliers/ Vendors will not be able to request changes on Purchase orders, this option will be disabled. However, changes made on Purchase orders will be visible to all parties.

[Configure PO Delivery](#)

1 Purchase Order Lines

Export to		View All		Search	
PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
342337	1	Issued	2 Année / Year / Años (annum) of Service	2	20.00
342335	1	Issued	10 Heure / Hour / Horas of SIT - C0005	10	5.00
342334	1	Issued	3 Pièce / Each / Unidad of SIT - C002	3	18.00

PAUL | NOTIFICATIONS 61 | HELP

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Business Performance
Sourcing
Add-ons
Setup

Orders
Order Lines
Returns
Order Changes
Order Line Changes
Shipments

Select Customer: Glencore Dev

2 Purchase Order Changes

View All		Advanced		Search							
PO Change #	Order #	Version #	Ship To User	Status	Items	Total	Supplier Initiated	Created By	Reason Code	Assigned To	Justificati
No rows.											

3.9 INVOICES TAB

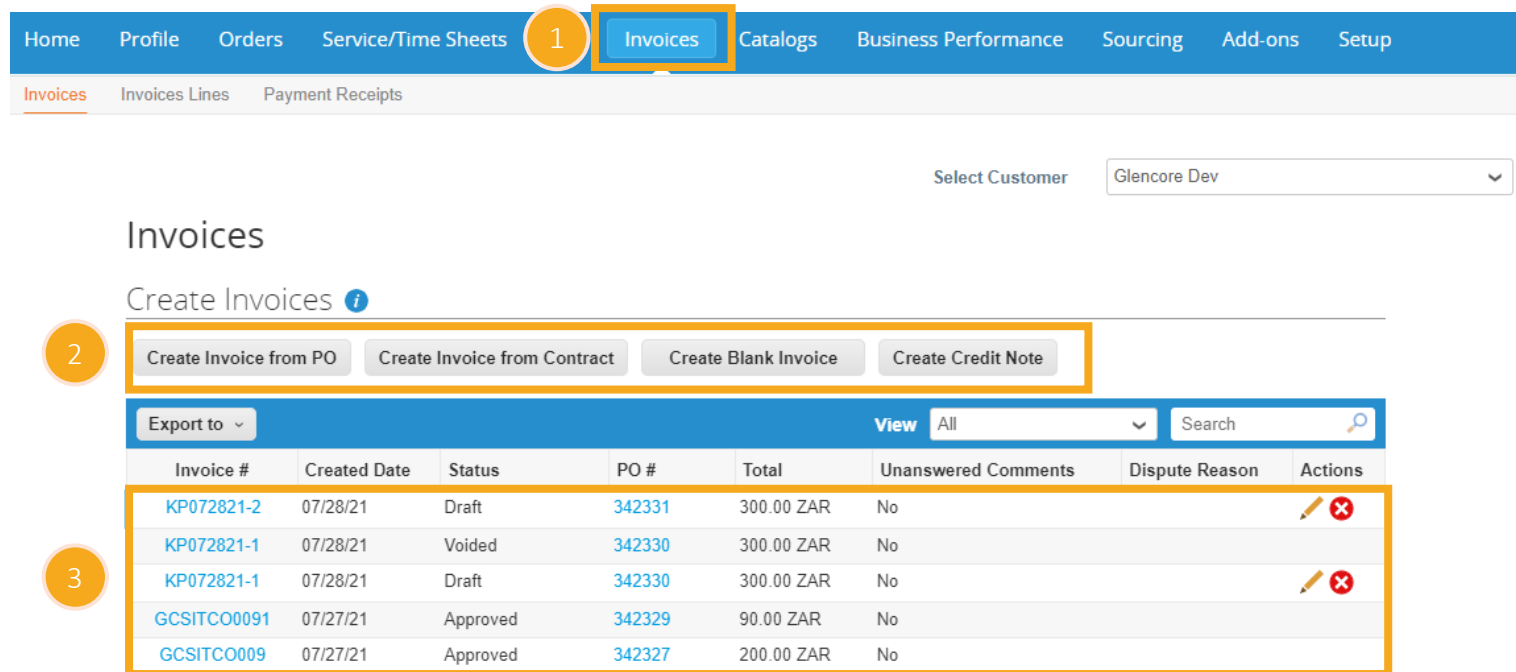
1 Entering the invoices tab you will be able to visualise everything related to this.

2 Functionalities to create invoices and credit notes

3 General information of the invoices you have made, you will be able to see their status and some general information.



NOTE: The invoices displayed are the ones that have been created. To create a new invoice you must create it through the orders tab.



Home Profile Orders Service/Time Sheets **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts





Select Customer Glencore Dev

Invoices

Create Invoices *i*

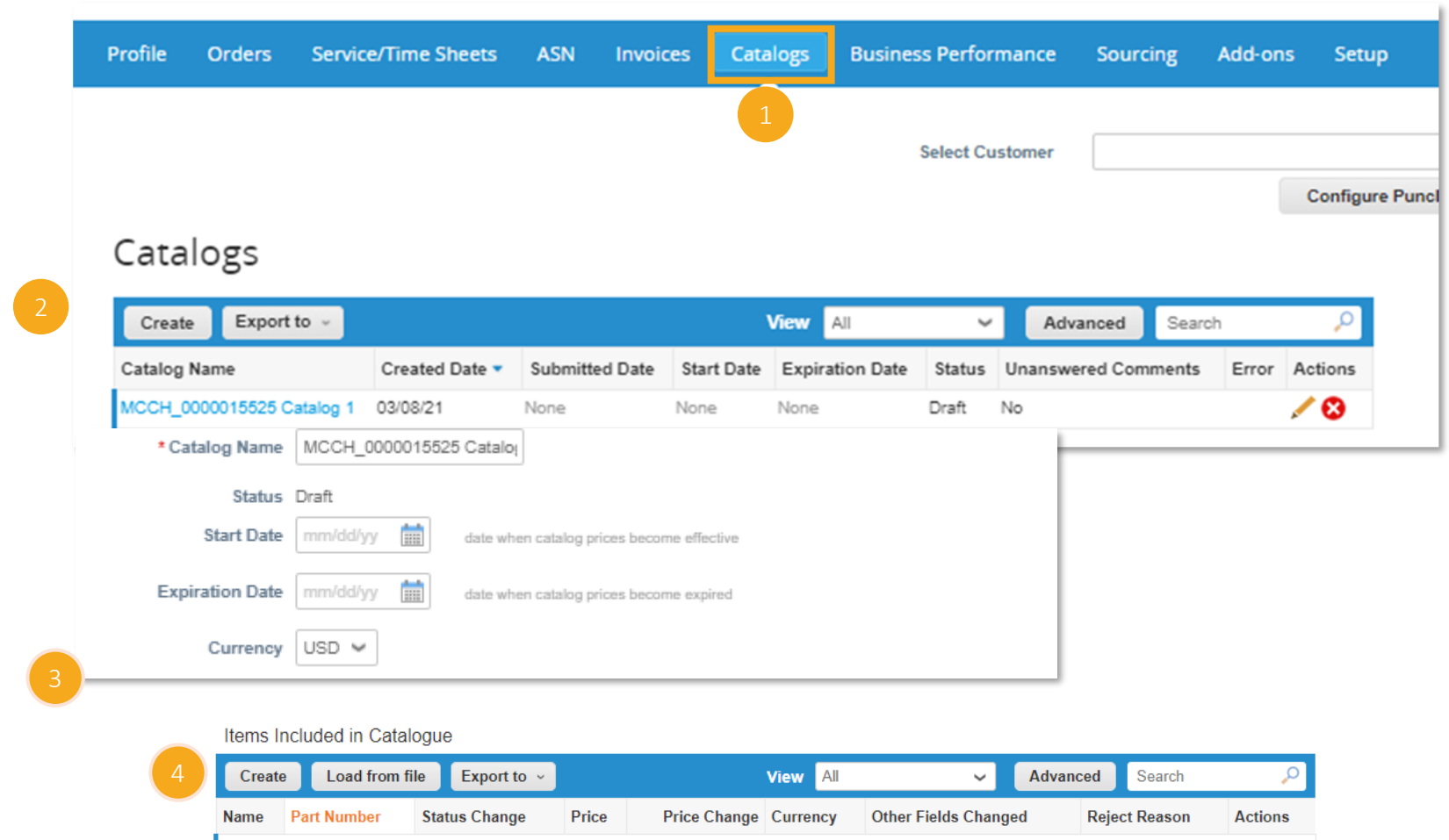
Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
KP072821-2	07/28/21	Draft	342331	300.00 ZAR	No		 
KP072821-1	07/28/21	Voided	342330	300.00 ZAR	No		
KP072821-1	07/28/21	Draft	342330	300.00 ZAR	No		 
GCSITCO0091	07/27/21	Approved	342329	90.00 ZAR	No		
GCSITCO009	07/27/21	Approved	342327	200.00 ZAR	No		

3.10 CATALOGUE

- 1 Suppliers can create and update Catalogues in the CSP which will undergo approvals in Coupa.
- 2 Click Create.
- 3 Populate the Catalogue name, Start Date, Expiry Date and Currency.
- 4 Click Create to create manually or Load from file to create in bulk.





Profile Orders Service/Time Sheets ASN Invoices **Catalogs** Business Performance Sourcing Add-ons Setup

Select Customer Configure Punct


Catalogs


Create Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
MCCH_0000015525 Catalog 1	03/08/21	None	None	None	Draft	No		 

* Catalog Name

Status

Start Date  date when catalog prices become effective

Expiration Date  date when catalog prices become expired

Currency

Items Included in Catalogue

Create Load from file Export to View All Advanced Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
...								

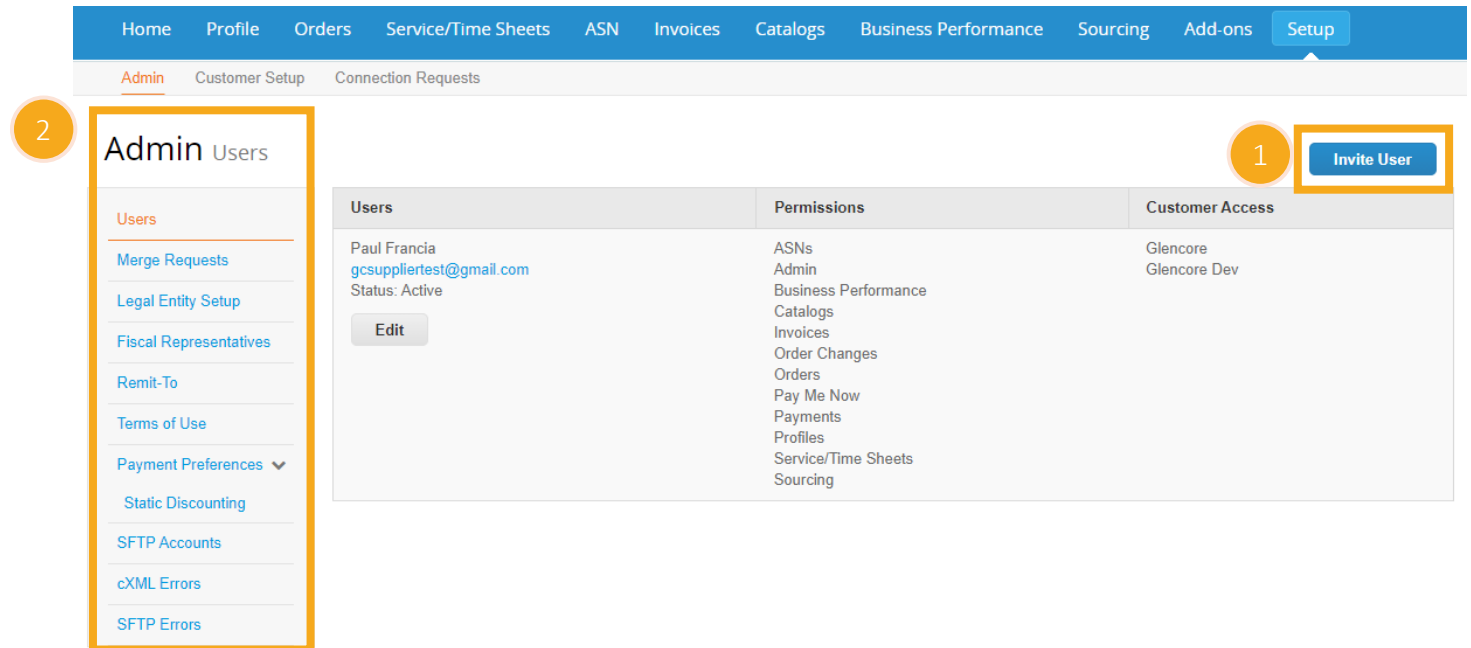
3.11 ADMINISTRATOR TAB

1 Entering the administrator tab, here you can configure some features of the account.

2 Functionalities available to you.



NOTE: All these functionalities will be detailed in section 8.



2

Admin Users

1 Invite User

Users	Permissions	Customer Access
Paul Francia gcsupliertest@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Glencore Glencore Dev

Additional support

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- ✓ Coupa Guides
- ✓ Glossary

SUPPLIER PORTAL GUIDES

Dedicated to suppliers on success portal and available directly on CSP

Coupa Success Portal Information

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

Purchase Orders

<https://www.coupa.com/success/purchase-orders>

Invoices

<https://www.coupa.com/success/suppliers-invoices>

Glossary



- **CSP:** Coupa Supplier Portal means suppliers will be able to make inquiries and upload information related to their invoices. The CSP also allows monitoring the invoice payment status, including payment problems. In addition, all related notifications will be sent to the registered email account.
- **Change request:** Make change requests on a purchase order, it can be for example price or quantity.
- **Credit note:** Document through which you can cancel invoices previously made.
- **Invoice:** Through Coupa you will have the possibility to generate an invoice against a purchase order (PO) and be able to follow it up
- **Sourcing Event:** RFX Events consist of Request for Information, Request for Quotation, and Request for Proposal defined by one buyer and many sellers.

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Glossary

RFX: RFI, RFQ or RFP

- **RFI:** Request for Information. Type of sourcing event used to collect qualitative information about suppliers or initiatives.
- **RFQ:** Request for quotation. Type of sourcing event that is used to obtain specific prices for products or services
- **RFP:** Proposal request. Type of sourcing event used when the product or service you obtain is complex in nature and requires a qualitative and quantitative assessment of the suppliers.
- **Lots:** Group of Items/Services That Need to Be Purchased Together from the Same Provider.
- **Items:** Lists of items to be procured. These can be set-up to be purchased together or from multiple suppliers if needed.
- **GC/GA/GZ - _____:** Taxonomy that users must follow for the names of sourcing events (GC _Glencore Coal /GA Glencore Alloys/ GZ Glencore Zinc)
- **Questionnaire:** Form that the supplier must complete with the options indicated (checkbox, text, attachments, or radio buttons) for further evaluation in the event evaluation process.

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QUESTIONS?

We are here to support you every step of the way.

**Project “Fusion”
Key Contact**

ZincFusionSupplier@glencore.ca

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