Coupa Supplier Portal Training

Welcome

- **Housekeeping**
  - Audio, chat and cameras will be disabled
  - Submit questions and comments through Q & A feature
  - 2/15 training session will be recorded and stored on State Farm Coupa Supplier Portal
- **Executive Sponsor, Jan Youngman**
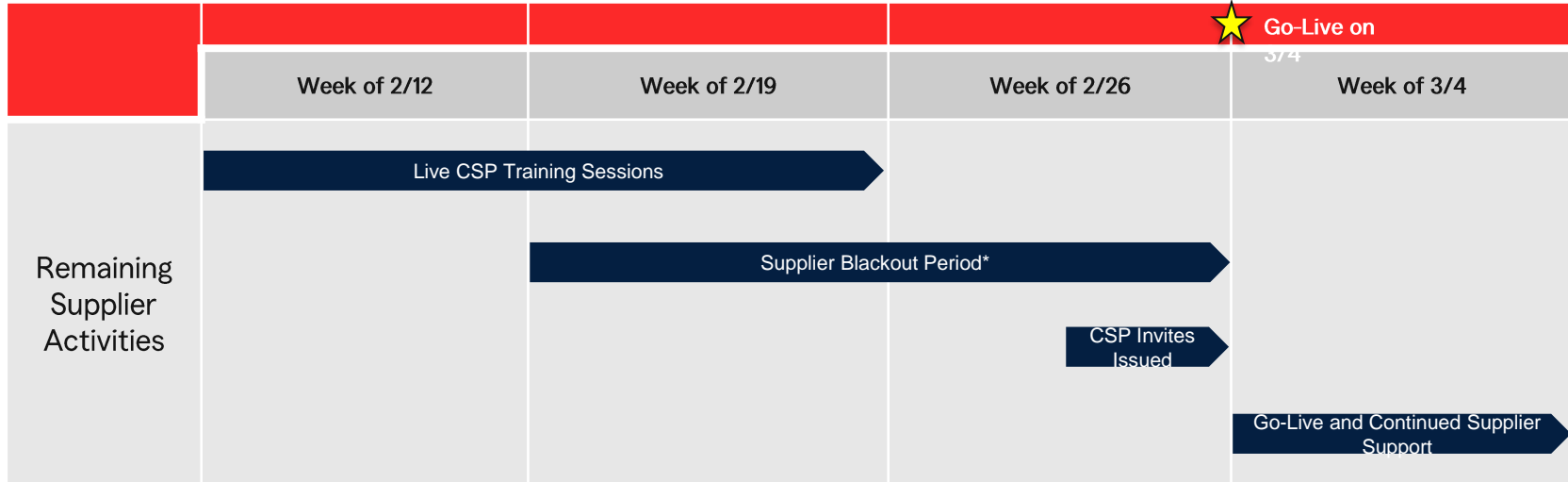- **Coupa Supplier Portal Demo & Training**

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Remaining Supplier Activities Timeline

	Week of 2/12	Week of 2/19	Week of 2/26	⭐ Go-Live on 3/4
				Week of 3/4
Remaining Supplier Activities	Live CSP Training Sessions →			
		Supplier Blackout Period* →		
			CSP Invites Issued →	
				Go-Live and Continued Supplier Support →

*During the Supplier Blackout Period no new purchase orders or invoices will be sent or received by State Farm in preparation for the March 4th Coupa Go-Live date. The Blackout Period will begin on 2/16/24

Training Approach and Resources

CSP training will primarily reference Coupa documentation that is readily available to all suppliers on the Coupa Supplier Help Center. This information is regularly updated and maintained by members of the Coupa team to ensure that suppliers have access to the latest trainings available. Below are a few helpful links and resources that both the State Farm and Coupa teams have available:

Quick Links
- Coupa Supplier Help Center
- State Farm Coupa Resource Portal
- Coupa Supplier Resource Portal

Ongoing Support
- State Farm Supplier Mailbox – home.adsv-supplier.224j02@statefarm.com

This training session will be recorded and added to the State Farm Coupa Resource Portal. Additional trainings around CSP cataloging capabilities will not be a part of this session and will be held at a later date.

Getting started with the CSP

CSP Email Invitation

State Farm will be issuing out invitations to join the CSP directly out of Coupa. These invitations will be sent directly from a Coupa mailbox and will include a link that you can follow that will guide you to the CSP where you can either add State Farm to your list of existing customers or create your CSP profile if you do not already have one.
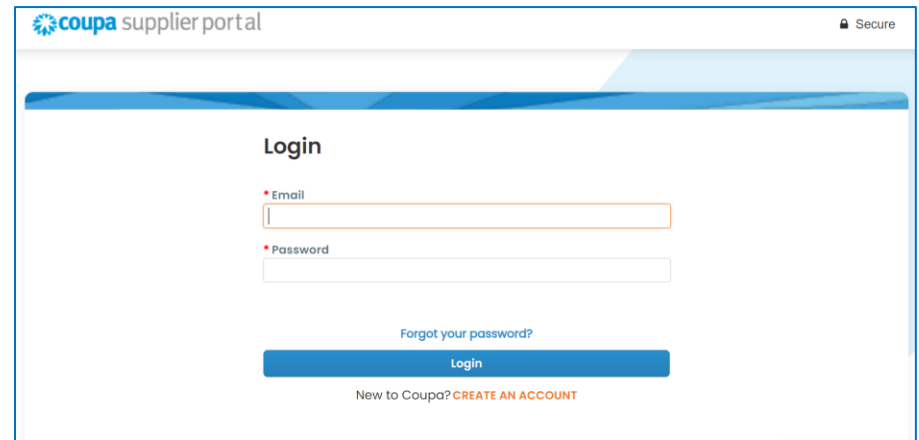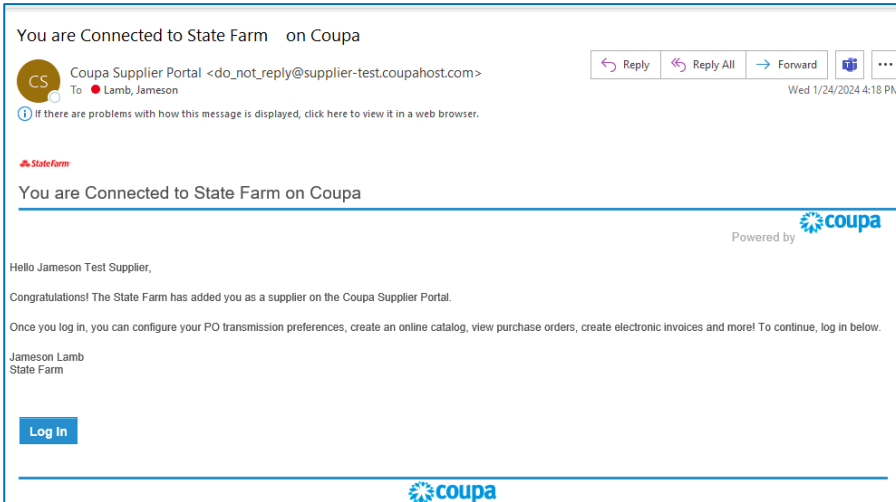
Additional information and FAQs around CSP registration can be found through the following link: CSP Registration Info

Setting up your CSP profile

Legal Entity Setup

Once logged in on the CSP, suppliers who do not already have a profile will be prompted to complete the set up of their Legal Entity. Information such as your Invoice From Location, Remit To Location, Ship From Location, and Tax ID will be gathered to help meet your customer's invoicing and payment requirements.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

What address do you invoice from?

* Address Line 1 | 200 E Randolph St
* City | Chicago
State | Illinois - IL
* Postal Code | 60602
Country/Region | United States

☑ Use this address for Remit-To ℹ️
☐ Use this for Ship From address ℹ️

What is your Tax ID? ℹ️

Country/Region | United States
Tax ID

Additional information and FAQs around legal entity setup can be found through the following link: Legal Entity Setup

Review orders and issue invoices on the CSP

Reviewing Orders and Issuing PO Backed Invoices

Once the supplier profile has been fully set up, you will then be able to begin receiving purchase orders and issuing invoices through the CSP. You are able to find all received purchase orders and already issued invoices by clicking on the Orders and Invoices tabs respectively located at the top of your page.

In order to invoice from a purchase order, you will need to click on the gold coin icon listed next to the PO on the Orders page

Additional information around reviewing POs and issuing invoices can be found through the following links: Reviewing POs, Creating Invoices

Issuing Non-PO Backed Invoices

In addition to PO-Backed Invoices, suppliers will have the ability to create Non-PO Backed Invoices through the CSP. You are able to create a Non-PO Backed Invoice by navigating to the Invoices tab and clicking on the "Create Blank Invoice" button. This will prompt you to fill out all applicable invoice information before submitting.

Additional information around issuing invoices can be found through the following link: Creating Invoices

Thank you

Thank you!