The Financial Times

Coupa Supplier Portal User Guide

FT

CSP Homepage & Settings

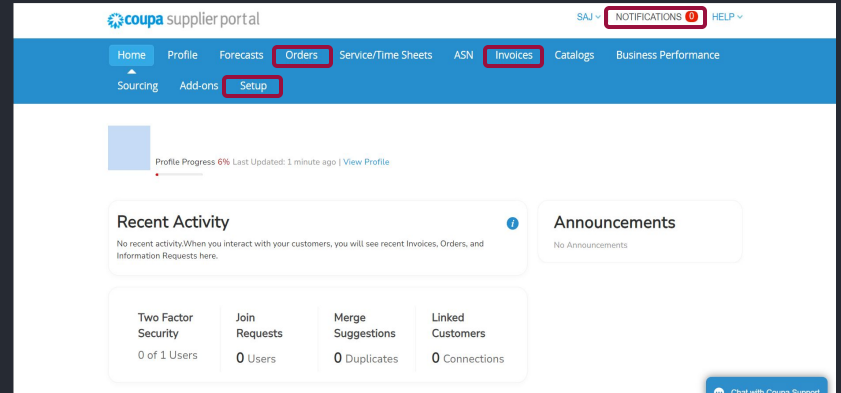# Contents

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CSP Homepage

CSP Homepage

To access a CSP function, select the relevant tab on the main menu at the top of the CSP Home page.

- ■ Notifications:
  - ○ View, Action & Manage Notifications

- ■ Setup:
  - ○ Manage, Merge Users & Legal Entity Setup

- ■ Orders:
  - ○ View Purchase Orders & Create Invoices

- ■ Invoices:
 - ○ View Invoices, Invoice Status & Create Credit Notes

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Multi-Factor Authentication

Enabling Multi-Factor Authentication

Step 1

The FT requires you to use multi-factor authentication to access data in the CSP.

1. To enable multi-factor authentication, click on the dropdown by your name in the top right hand corner and select 'Settings'

2. Select the Security & Multi Factor Authentication link on the My Account page

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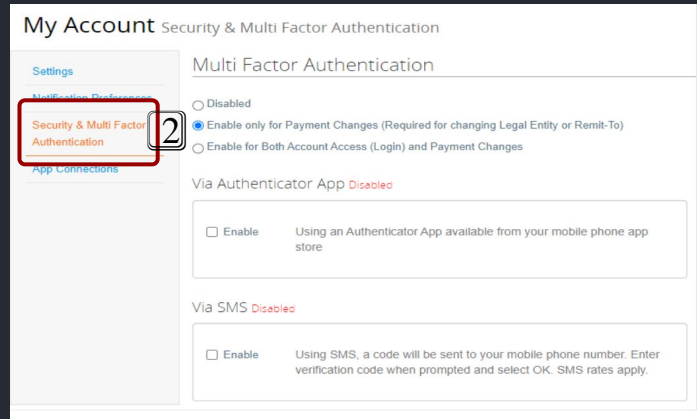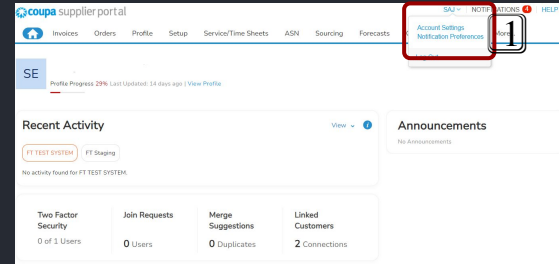
Enabling Multi-Factor Authentication

Step 2

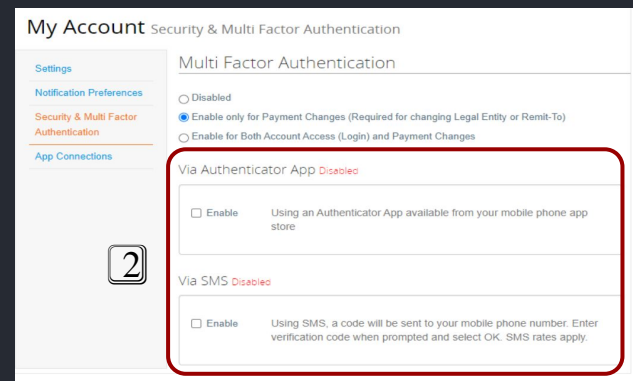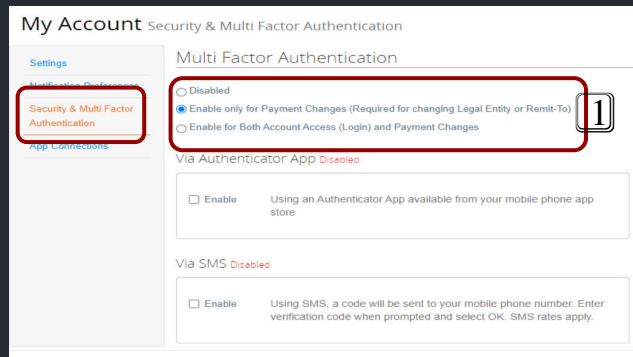1. When you enable multi-factor authentication, you can choose from the following options:

For Payment Changes (Required for Changing Legal Entity or Remit-To): Multi-factor authentication is required when creating or editing legal entities, remit-to, and bank account information.

For Both Account Access (Login) and Payment Changes: Multi-factor authentication is required when logging in to the CSP. You don't have to reauthenticate when working with financial data because you already authenticated when logging in.

2. Depending on how you want to receive the verification codes, select one of the following options and set your preference as the default:

Via Authenticator App - to use an authenticator app available from the app store on your mobile phone.

Via Text Message -to use a code sent by text message to your phone number.

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Enabling Multi-Factor Authentication

Step 3 - SMS

❗ Please note: If you want to receive text message (SMS) notifications or verification codes, you must enter and validate your phone number under My Account > Notification Preferences.

1. For the text message, enter your number, confirm the Captcha and select 'Send Code'.

2. Enter the verification code received and select 'Enable'.

Enabling Multi-Factor Authentication

Step 3 - Authenticator App
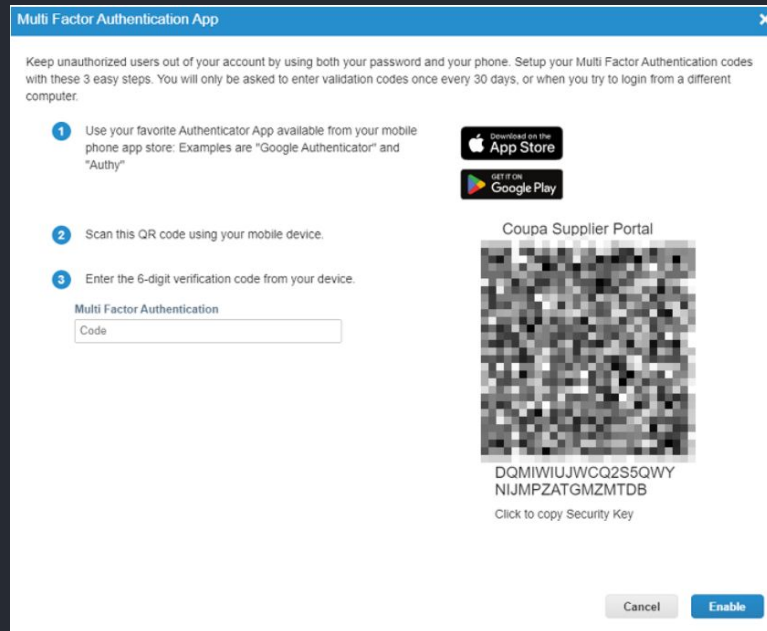
For installing and using Google Authenticator, follow the on-screen instructions.

Download and install an authentication app from the Google Play store or the Apple app store.
Scan the QR code or copy the security key to use it as the CSP authentication code.

Print your backup codes or email them to yourself before you click OK. If you ever lose your device, you need these to regain access to your CSP account.

When you enable multi-factor authentication, you get an email notification of the change.

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Changing the language in the CSP

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Changing Language in the CSP

1: You can change the language of the CSP from any screen, in the grey footer. Hover over the current language for the drop down list to appear.

2: Select your preferred language from the list.
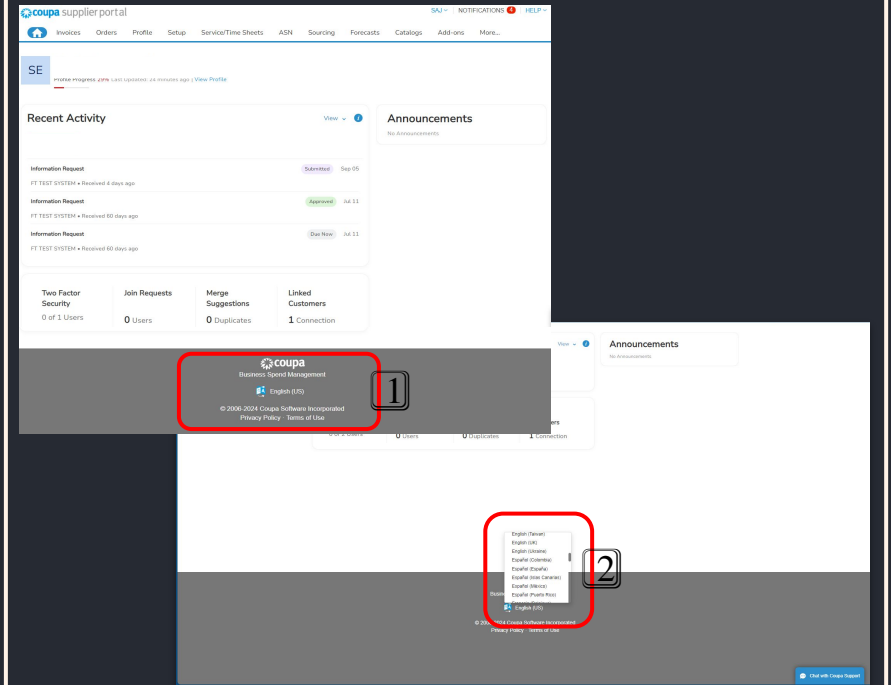
Supplier Actionable Notifications (SAN)

Overview

Supplier Actionable Notifications (SAN) let you receive orders and work with the FT, without the need to join Coupa's supplier network or create a CSP account. You can acknowledge, invoice from, or add comments to a PO directly from the notification Coupa sends you on the FT's behalf.

You'll also get notifications after you submit an invoice to the FT, and updates when the FT performs an action on your invoice. This improves transparency and further reduces the need for suppliers to track down the status of their invoices through phone calls or emails.

Suppliers that are already registered for the CSP can also take advantage of SAN.

You receive a SAN notification with action buttons and can create an invoice 'Create Invoice' from or add a comment to the PO 'Add Comment', acknowledge the receipt of the PO 'Acknowledge PO', or create a CSP account 'Create Account' by clicking on the relevant button.

Coupa Liquid Purchase Order #1000000150

Create Invoice   Acknowledge PO   Add Comment

Create Account

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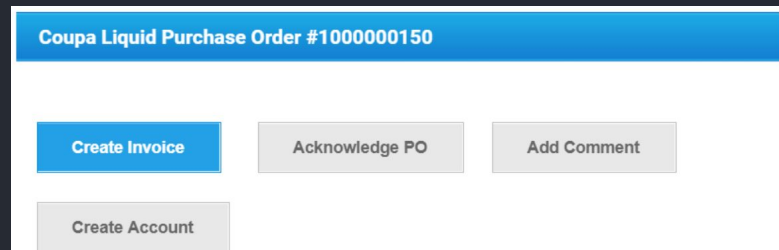
Create Invoice from SAN

Step 1:

When selecting the **Create Invoice** button, you will be prompted to add an invoice from, and 'Ship from' addresses.

If you do not have a CSP account where you have already added a legal entity, you need to add one by selecting the **Add New** link.

1. You are guided through creating your legal entity. The selected or newly created legal entity is added to your invoice. Please see our guide on Invoicing - Setting up E-invoicing for steps to create a legal entity.

CSP account holders will be able to choose the legal entity from the dropdown menu.

2. You will be prompted to enter a **Remit-To** address the first time you create an invoice using this method. This information will not be used for payment but will be stored for future invoices created through this method.

Choose Invoicing Details

1. *** Legal Entity** | Legal Entity 1 | Add New

Invoice From Success Street
Customer City, 12345
United States
United States

2. *** Remit-To** | Select | Add New

* Ship From Address | Select | Add New

Cancel

FT

Create Invoice from SAN

Step 2:

The Create Invoice button will pull the relevant information from the PO onto the invoice. You will only need to enter the Invoice number and Shipping/Tax/Misc. charges, as well as other necessary data not on the PO.

Complete the mandatory fields (marked with a red asterisk). You can create or choose an invoice from, a remit-to, and/or a ship from address by selecting the corresponding Search icon (magnifying glass) in the From section.

You can also attach files to an invoice. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

When Shipping/Tax/Misc. Charges have been added, select 'Calculate' to update the total on the invoice.

Select 'Submit' to send the invoice.

Other SAN options

Acknowledge PO eliminates time-consuming calls and emails by quickly acknowledging receipt of the PO. This will mark the PO as acknowledged and let the FT know you have received the order.

Add Comment this is another communication tool available for you to add a time stamped comment directly to the PO.

Create Account lets you create a Coupa Supplier Portal (CSP) account directly from the PO by taking you to the registration/login page.

Coupa Liquid Purchase Order #1000000150

Create Invoice Acknowledge PO Add Comment

Create Account

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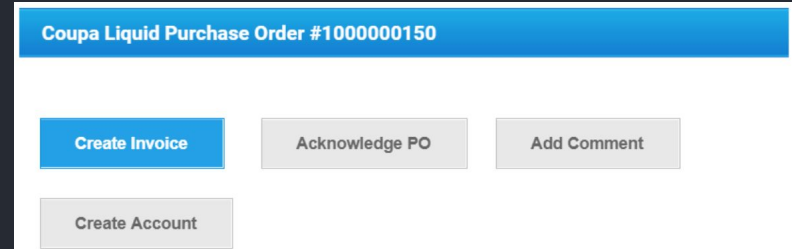
Managing Notification Preferences

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Manage Notification Preferences

Step 1:

1: After Logging into the CSP, from the CSP Homepage, select **Notifications** shown in the menu on the top right of the window.

2: A new page 'My Notifications' will open. Select **Notification Preferences.**

Manage Notification Preferences

Step 2:

This will open your account Notifications Preferences settings page. Here you can see what notification options are chosen. Review each option and tick or untick against the relevant option 'Online', 'Email' and/or 'SMS' as required.

❗ Please note: If you untick any email options you will stop receiving email notifications. It will be your responsibility to manage items from your CSP account.

Manage Notification Preferences

Step 3:

If you select the SMS option, a pop up window will open 'Enable your mobile phone number to receive SMS notifications on the My Account page'. You will need to update a mobile number.

1. Select **OK** to return to the options page.
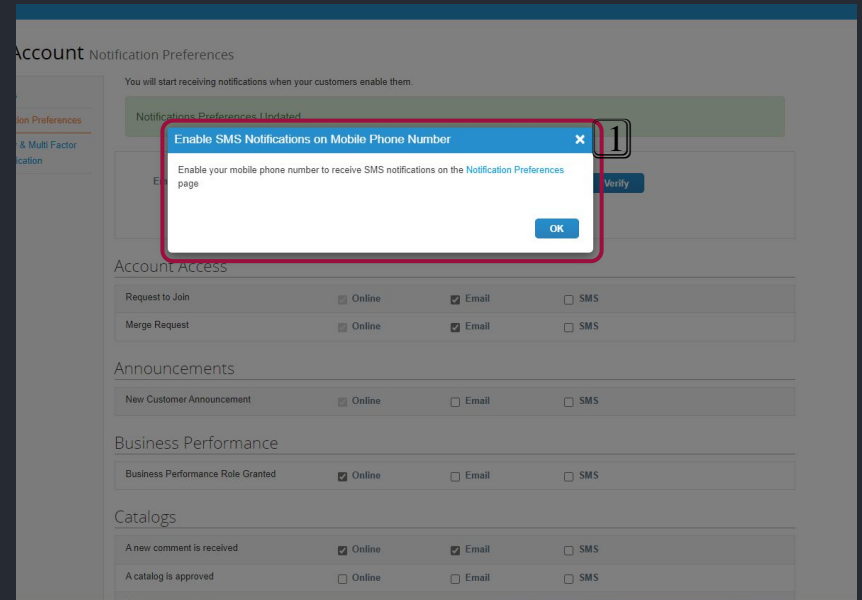
Manage Notification Preferences

Step 4:

1: Scroll down to the end of the page. Once you have made your changes select **Save** at the bottom.

Your notifications preferences have now been updated.

Amending Bank Details

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Amending Bank Details

Step 1:

1: Select **Setup** in the top menu.

2: On the left hand menu, select **Legal Entity Setup**

Amending Bank Details

Step 2:

1: Select **Actions** > **Manage Legal Entity**

2: Select the Legal Entity you wish to update the Bank Details for

Amending Bank Details

Step 3:

1: In the Miscellaneous Information pop up window, select **Continue**

2: In the next window select **Continue**. Please note: You can also update your tax information here.
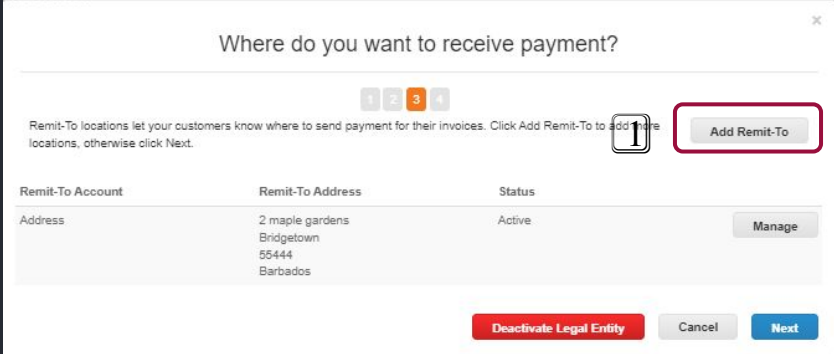
Amending Bank Details

Step 4:

1: In the 'Where do you want to receive payment?' pop up, select **Add Remit To.**

Amending Bank Details

Step 5:

1: In the Payment Type drop down at the top of the screen ensure **Bank Account** is selected.

2: Enter the new banking details in the relevant boxes. There are options for IBAN and SWIFT codes if not a UK bank account.

This screen also allows you to update your 'Remit to' address.

3: Select **Save and Continue** at the bottom right of the box when you have entered the information that needs to be updated.

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Amending Bank Details

Step 6:

1: In the popup select **Next**

2: The following popup will give you the option to update or add an address where goods are shipped from, if this is not applicable please leave this blank. Select **Done** to complete and save the new banking information.

When you next issue an invoice the new banking information will be displayed, this will be automatically flagged to the FT highlighting the difference.

❗ COMPLETE THE STEPS IN THE FOLLOWING SLIDES TO EXPEDITE THE UPDATE OF YOUR INFORMATION

FT

Amending Bank Details - Expedite the process

Step 7:

1: Select **Profile > Information request** in the top menu bars.

❗ PLEASE NOTE IF NO INFORMATION IS DISPLAYED ON THIS SCREEN, YOU WILL NEED TO CONTACT US AT P2P@FT.COM WITH THE UPDATED BANKING INFORMATION

2: If you can see 'FT Supplier Information Form' scroll down to the bottom of the screen and select the grey 'Update Info' button.

Amending Bank Details - Expedite the process

Step 8:

1: Scroll down to the **Company Bank Details** section where you can attach one of the Accepted Supporting Documents to notify us of the new banking details.

2: Select **Add File** to attach a document.

Accepted attachments are:
- Bank Statement
- Paying in Slip
- Void Cheque
- Bank Certificate

3: Once you have attached the relevant documents, scroll to the bottom and select **Submit for Approval**. This will create an action for the FT to update this information based on the attached documentation.

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Further help and support

If you are unable to find answers to your questions within these guides you can refer to:
- FT Supplier Webpage, which includes FAQs and other supporting information: aboutus.ft.com/suppliers
- You can contact our Procure-to-Pay Operations team at p2p@ft.com

Or if you require technical assistance with Coupa you can refer to:
- Coupa Supplier Help Centre
- Coupa Compass - Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the 'Getting started with the CSP' guide from Coupa
- From the CSP homepage you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

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Glossary of Terms

CSP	Coupa Supplier Portal
Admin	The person with Administration rights for the Coupa Supplier Portal for your account
Financial Times business contact	The Financial Times employee you have been discussing supply of goods and/or services
PO	Purchase Order
Users	Your employees who have access to the Coupa Supplier Portal
Invitation	There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date>. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.
Coupa Compass	This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help
Supplier Information Form	This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP

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