



Supplier Enablement Quick Reference Guide (QRG)

October 2017

Coupa Supplier Enablement Overview

Coupa - Is a reimagining of the tools and technology we use to engage our suppliers from sourcing all the way to invoicing. Coupa will deliver simple, industry-leading technology that will provide greater transparency into transaction status and make doing business with Jabil even easier.

The Coupa Experience



Better Transaction Status

Status tracked via the Coupa Supplier Portal (CSP) and posted within Coupa, allowing for greater visibility for suppliers

PO Transmission

Coupa will notify suppliers via Email that a PO is transmitted to the CSP

PO Confirmation

PO confirmation via the CSP giving you greater insight and visibility into your payment status

Free of Charge!

There is no cost for you to transact on the CSP

Supplier Quick Reference Guide: Getting Started on the Coupa Supplier Portal (CSP)



Sign Up on the CSP

You will receive an email containing an invitation from Jabil to connect on the CSP. Click on the URL embedded in the email to create your CSP account.

1. Click on URL embedded in email from CSP
2. On the Welcome screen, enter the following information to create your profile
 - First Name
 - Last Name
 - Your Company Name
 - Email Address
 - Password – Note: password must contain one letter and one number
 - Password confirmation
3. Click Ok



Enter Remit-To Addresses

You must enter your remit-to address before you can submit any invoices to Jabil.

1. Click on the Admin tab in the top ribbon of your window
2. On the left menu, click E-Invoicing Setup
3. Select Add Legal Entity button and follow the prompts to add the following information
 - Remit-To Name
 - Remit-To Code
 - Country
 - Address Line 1
 - City
 - State
 - Zip Code
4. Under Assign Customers, select the customers you wish to connect with
5. Click Ok



Add Users

You can add additional users to access and manage your supplier account.

1. Click on the Admin tab in the top ribbon of your window
2. From the left menu, click Users
3. Click Invite User
4. Enter the employee's email address and identify the appropriate permissions
5. Click Send Invitation to trigger an email with account activation instructions
6. Restrict access to specific customers by checking/unchecking the box under the customer name in the user table
7. Deactivate users by clicking on the Deactivate button

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Manage Company Profile

You can maintain information about your company in your Profile.

1. Click on the Profile tab in the top ribbon of your window
2. Click Edit Profile
3. Enter relevant information
4. Click Save

View Orders

You can view all purchase orders (POs) issued by Jabil via Coupa.

1. Click on the Orders tab in the top ribbon of your window
2. Click on the PO # to view the PO
3. To acknowledge a PO, click the Acknowledged check box
4. If any changes are made, click Save
5. Click Print View to print the PO
6. If comments are added, click Add Comment

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Flip PO to Invoice / Credit Note

You can create invoices / credit notes directly from POs.

1. Click on the Orders tab in the top ribbon of your window
2. Locate the PO that you want to flip into an invoice / a credit note
3. Click the Create Invoice (gold coin stack) or Create Credit Note icon (red coin stack)
4. Enter the Invoice # / Credit Note #
5. Confirm the remaining fields
6. Add an attachment, if applicable
7. Enter Quantities, Prices (for items), Amounts (for services), Shipping, Handling, Misc Fees, and Tax
8. Click Calculate to update the Total
9. Click Submit

View Status to check the invoice status. Payment status may be viewed in the Payment details.



Create & Submit Your Own Invoice

You can create and submit your own invoices, including non-PO invoices via the CSP as well.

1. Click on the Invoices tab in the top ribbon of your window
2. For non PO invoices, click the No Contract radio button at the bottom of the screen” and click Create
3. Enter invoice details, including Invoice #, date, line items Shipping, Handling, Misc Fees, Tax and Comments and add invoice image and other attachments
4. Click Calculate to update the Total
5. Click Submit.

View Status to check the invoice status. Payment status may be viewed in the Payment details.

Thank you!

JABIL