

# Coupa Guide for Suppliers

Welcome to the Coupa Supplier Portal!

From 8 June 2024 onwards, this will be Barry Callebaut's preferred way of collaborating with you on purchasing activities.



**In this document:**


- Invitation and Joining the Coupa Supplier Portal
- How to use the Coupa Supplier Portal (CSP)
- Viewing and managing your POs
- FAQs and Support

# Invitation and Joining the Coupa Supplier Portal







You will receive an invitation from Barry Callebaut to join the Coupa Supplier Portal that will be similar to the one seen below.


- If you do not have a Coupa Supplier Portal (CSP) account created, you will click the **Join Coupa** button
- If you are not the correct recipient, click **Forward this invitation** to forward to someone inside your organization.

[External] Action Required - Barry Callebaut Registration Instructions


 Coupa Supplier Portal <do\_not\_reply@supplier-t  
To

Wed 10/04/2024 15:41

  Reply  Reply All  Forward  


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

**CAUTION: External email. Be cautious with links and attachments.**



**Action Required - Barry Callebaut Registration Instructions**

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Powered by 

Hello Valued Supplier,

As of today, June 8th, Barry Callebaut is proud to announce that we have now transitioned our purchasing activities to Coupa in Belgium.

You can now use the Coupa Supplier Portal (CSP) to manage purchase orders and your company information. Click on the link below and follow the steps to link to Barry Callebaut via Coupa. If you are not the right person at your company, redirect this invitation to the correct person by using the "Forward this invitation" button. If you do not have an existing Coupa account, you will be prompted to create one. **You do not need to sign up for the Coupa Verified program – the Coupa Supplier Portal is free of charge.**

You can easily identify the Coupa POs as the PO number begins with the "42" prefix.


For training material or additional information please visit our Supplier Training site.

You can also view our recorded webinar for details regarding the upcoming changes for you. You can find the webinar on our supplier page.

Thank you,  
Barry Callebaut Supplier Enablement Team

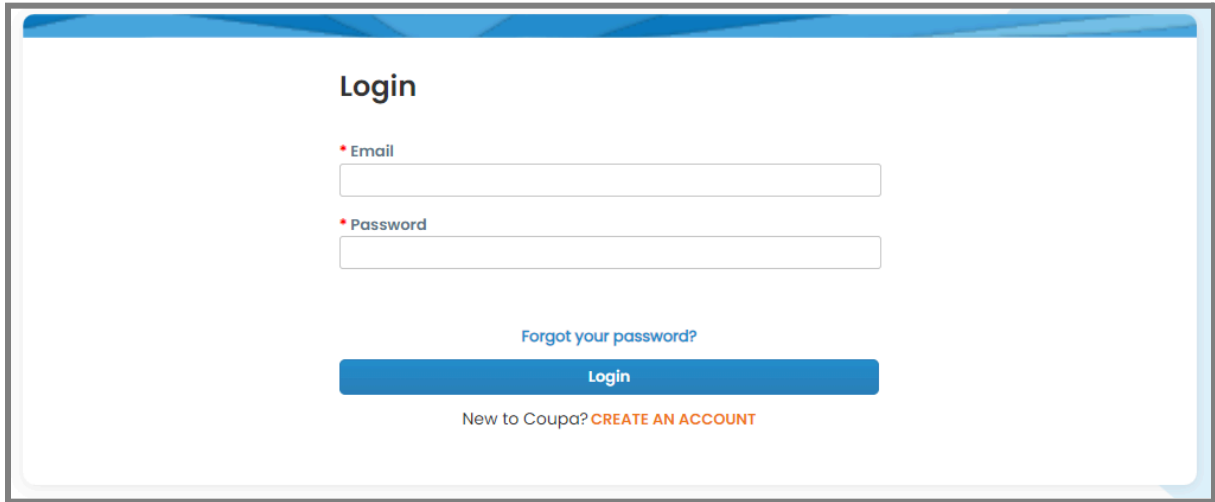
[Join Coupa Supplier Portal](#) [Forward Invitation](#)

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Business Spend Management

After following the link from the invitation email, fill in the mandatory fields to provide basic information for your account and your company's public profile.

To log in, go to [supplier.coupa.com](https://supplier.coupa.com) and in the Log In pane on the right, enter your email address and password and click Log In.



## How to use the Coupa Supplier Portal (CSP)

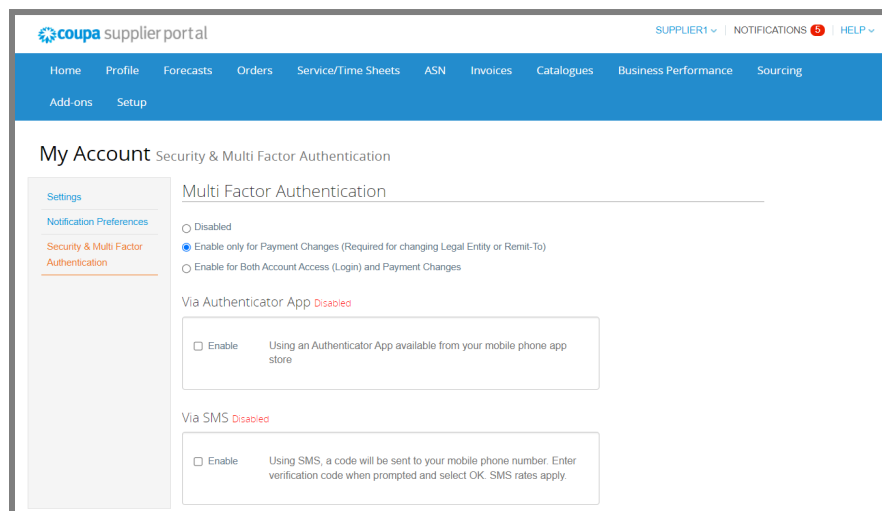
### Public Profile

Anyone can find and connect with you through your [public profile](#).

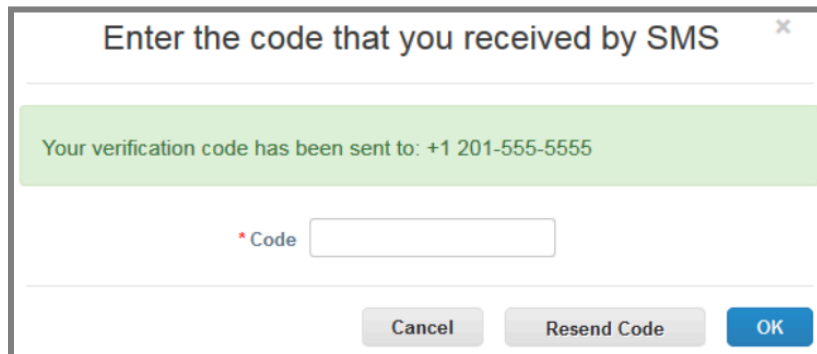
Your public profile is created when you create your account and it contains general information about your company, for example, name, logo, website, industry, year of establishment, top commodities, currencies, diversity, and corporate social responsibility rating (on the Home and Profile / Public Profile pages), the link to your public profile (on the Home page), and contact information (on the Profile / Public Profile page).

### Enable or Disable Two-Factor Authentication

On the [My Account](#) page, click on the Security and Two-Factor Authentication link to enable or disable two-factor authentication.



Note: If you want to receive SMS notifications or verification codes, you must enter and validate your phone number under Mobile Phone Verification. Under Two-Factor Authentication, click Enable for SMS or for Two Factor Authenticator App depending on how you want to receive the verification codes. For **SMS**, enter the verification code in the pop-up window. After successful validation, you receive the verification codes in text messages. For installing and using **Google Authenticator**, follow the on-screen instructions.

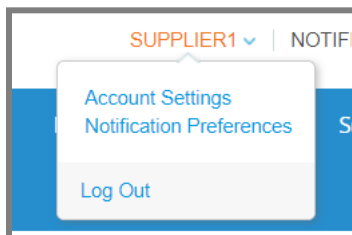


### Disable two-factor authentication

Under Two-Factor Authentication, click **Disable** for SMS or for Two Factor Authenticator App and, in the appearing window, enter your Coupa Supplier Portal (CSP) password and click Disable Two-Factor Authentication. If you enable or disable two-factor authentication, you get an email notification of the change.

### Manage Your Account

On the **My Account Settings** page, you can make changes to your personal information (name, department, role, and password), set or modify your notification preferences, or enable/disable two-factor authentication.



Note: You can access and edit your company information on the Profile page.

To change your account settings, click on your name link and on the Account Settings link.

### Personal information

On the appearing **My Account Settings** page, fill in the fields you want to change, and then click Save. The asterisk (\*) indicates mandatory fields.

**My Account Settings**

Settings

Notification Preferences

Security & Multi Factor Authentication

### User Details

\* First Name

\* Last Name

\* Email

Department

Role

**Save**

### Change Password

\* Current Password

\* Password

Use at least 8 characters and include a number and a letter.

\* Password Confirmation

**Save**

## Navigate and get help – by Chat

Whether you are logged in to the Coupa Supplier Portal (CSP) or not, you can chat with **Coupa Support** to get a quick response or resolution to your case.

- Click Chat with Coupa Support in the bottom right corner of the page to launch the chat.

Note: If all the support agents are offline or busy, you can Send a support request through an offline form in the same chat window.

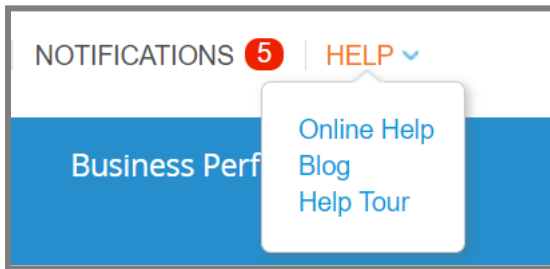
- Provide your contact information: first name, last name, email address, and phone number (optional).

Note: If no support agent is available, you also need to provide the subject of your request and a detailed issue description, after which you can see a confirmation that your case was submitted and logged. A support agent contacts you as soon as they are available.

- Start chatting with the support agent.

**Important Note:** Coupa Support is a generic Coupa team, they will not be able to respond to your Barry Callebaut specific inquiries. If you have BC specific questions, please reach out to your BC contact.

## Help Tour and Online Help



When you log in for the first time, you are greeted by the Help Tour (welcome tour) on the Home screen.

Click on the Help link in the top right corner of the page to access the Online Help or to view the Help Tour any time.

### Coupa Supplier Portal Menu

To access a Coupa Supplier Portal (CSP) function, click on the relevant tab on the main menu at the top of the Coupa Supplier Portal (CSP) main page.

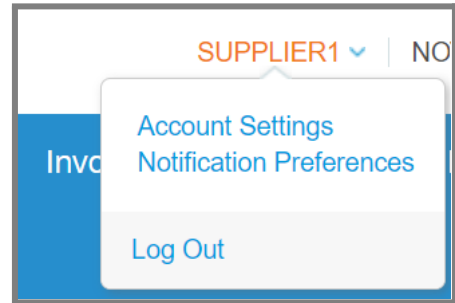
Menu Item	Description
Home	View and improve your public company profile, see the list of customers you are connected to, edit your customer-specific company profile and merge accounts. You can go to the Home page from any page by clicking on the Coupa Supplier Portal logo/link in the top left corner above the main menu.
Profile	Create, modify and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
Forecasts	Currently not in use by BC
Orders	View the purchase orders you received from your customers.
Service/Time Sheets	Currently not in use by BC
ASN	Currently not in use by BC
Invoices	Currently not in use by BC
Catalogues	Create and manage customer specific catalogs.
Business Performance	View a summary of orders and invoices that may need attention, your year-to-date order and invoice trends, and your lead time to shipping goods.
Sourcing	View and participate in the sourcing events that you are invited to.
Add-ons	Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update and more.
Setup	Manage users, manage requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use, and set preferred accelerated payment terms.

## View and Manage Notifications

Hover your cursor over the Notifications link to see your unread system notifications. Only the three most recent notifications are shown.

On the My Notifications page, you can view all your (read and unread) notifications, or you can filter by category (FYI, Todo, Unread, or Announcements). You can select and delete them all or one-by-one.

Clicking on a notification link takes you to the relevant page.



To change your notification preferences, click on the Notification Preferences button in the top right corner. Or click on your name link and on the Notification Preferences link.

## Create Custom Views

You can create custom views for orders, order lines, order changes, order line changes and catalogs. With a custom view you can create a set of advanced search filters.

### Create New Data Table View

General

Name

Visibility  Only Me  
 Everyone

Start with view

Conditions

Match Conditions

Filter By  Filter Clause  Filter Text

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.  
You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

Available columns	Selected columns
<input type="checkbox"/> Comments	<input checked="" type="checkbox"/> PO Number
<input type="checkbox"/> Payment Agreements	<input checked="" type="checkbox"/> Order Date
<input type="checkbox"/> PO ID	<input checked="" type="checkbox"/> Status
	<input checked="" type="checkbox"/> Acknowledged At
	<input checked="" type="checkbox"/> Items
	<input checked="" type="checkbox"/> Unanswered Comments
	<input checked="" type="checkbox"/> Total
	<input checked="" type="checkbox"/> Assigned To
	<input checked="" type="checkbox"/> Actions

- On the main menu, click on the tab for the function for which you want to create a custom view.
- At the top of the table whose view you want to change, click **Create View** in the View drop-down list.
- On the Create New data table view page, select the customer for whom you want to change the view settings, and then specify the settings you want to use for your custom view, including filtering conditions, columns to include, and sorting criteria.
- Save your settings.

To delete a custom view, open the view for editing by clicking on the Edit View (pencil) icon and click on the Delete (red “X”) button at the bottom of the page.

## Viewing and managing your POs

Click on the Orders tab on the main menu. The **Orders** page with the Purchase Orders table appears.

Note: The Coupa generated Pos from BC will begin with the “42” prefix, so you will be able to identify them easily.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' on the left and 'SUPPLIER1', 'NOTIFICATIONS 4', and 'HELP' on the right. Below this is a main menu with tabs: Home, Profile, Forecasts, **Orders**, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. Under 'Orders', there are sub-tabs: Order lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Deliveries. A 'Select Customer' dropdown is set to 'Barry Callebaut'. The main heading is 'Purchase Orders'. Below it, there's a section for 'Instructions From Customer' with a text box containing '(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)' and a button 'Click the Action to Invoice from a Purchase Order'. At the bottom, there's a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains one row: ACN00000069, 06/02/2024, Issued, None, 2 Hour of Marketing and Advertising, No, 400.00 EUR.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ACN00000069	06/02/2024	Issued	None	2 Hour of Marketing and Advertising	No	400.00 EUR		

From the Select Customer drop-down list in the top right corner, select Barry Callebaut.

The Purchase Orders table shows the following information for all the POs you received from the selected customer.



You can also **print POs**. Click on the PO Number link to open the PO and at the end of the PO, click on the Print View button. Depending on your browser, click on the three vertical dots or the three horizontal lines icon in the top right corner of the appearing window to open the browser menu, and select Print from the list of options.



## FAQs and Support

### **Account, Login, Registration**

#### **How much does it cost to join the Coupa Supplier Portal (CSP)?**

Coupa doesn't charge suppliers to use the Coupa Supplier Portal (CSP). **You do not need to get verified to use the Coupa Supplier Portal (CSP).**

#### **Where do I register for the Coupa Supplier Portal (CSP)?**

You can request an invitation to join the Coupa Supplier Portal (CSP). Ask Barry Callebaut to send you an invitation email or visit <https://supplier.coupahost.com>.

#### **Why didn't I receive the email invitation to join Coupa?**

Check your spam/junk email folder.

Emails sometimes get flagged as spam. If you still cannot find the email invitation, please reach out to your BC contact so they can check the contact details and make sure you have been invited with the correct email address.

#### **Why can't I register for the Coupa Supplier Portal (CSP)?**

If you received the email invitation with the link and can't register, check the 'I'm not a robot' field. If there are any other issues, write to [supplier@coupa.com](mailto:supplier@coupa.com) for non-Barry Callebaut specific questions. If you need BC to resend an invitation or make sure your contact details are correct, please reach out to your BC contact.

### **How do I register if the admin/owner of the Coupa Supplier Portal (CSP) account left the company?**

Contact your IT department or Barry Callebaut.

Your IT department can sometimes grant someone temporary access to email to log in as the Admin that left your company, and add you as a user with full access to all roles and permissions. You can also have Barry Callebaut change the contact information for you as a supplier and then "unlink" from the old admin's account, then "relink" or invite using your email. All the transaction data remains. Some basic company information and details may need to be updated in the new account, but most of the important information and transaction details are carried over automatically to the new account.

### **Where do I sign in to the Coupa Supplier Portal (CSP)?**

<http://supplier.coupahost.com>

### **How do I cancel my Coupa Supplier Portal (CSP) account?**

If you're no longer doing business with Barry Callebaut who set you up on the Coupa Supplier Portal (CSP), ask Barry Callebaut to make you inactive in the system.

### **What do I do if I am locked out of the Coupa Supplier Portal (CSP)?**

Using two-factor authentication protects you against fraud. For more information, see the Enable or Disable Two-Factor Authentication section.

If you don't have your six-digit backup validation code, contact [supplier@coupa.com](mailto:supplier@coupa.com) who will ask you to fill in a declaration form and provide either a copy of your photo ID or passport or your Coupa Supplier Portal (CSP) login email to verify your identify.

### **Why don't I get the password reset emails?**

Check your spam/junk email folder.

Emails sometimes get flagged as spam. If you still cannot find the email, write to [supplier@coupa.com](mailto:supplier@coupa.com).

### **Why can't I log in to the Coupa Supplier Portal (CSP)?**

Make sure you have followed the instructions in the Log in to the Coupa Supplier Portal (CSP) section. If you still have issues, reset your password. If the problem persists, write to [supplier@coupa.com](mailto:supplier@coupa.com).

### **Why can't I log in after resetting my password?**

Check if you are using the correct URL: <https://supplier.coupahost.com>.

Sometimes users bookmark the password reset URL (instead of the login URL) or bookmark a test site.

### **How can I log in if I forgot my two-factor authentication code, the code is not working, or I lost my device?**

If you cannot log in because of missing two-factor authentication codes, try to find and recover them first by using Google Authenticator or your device for text messages (SMS) to get new codes, or by using backup codes that you were told to copy or write down.

If you lost your codes, contact [supplier@coupa.com](mailto:supplier@coupa.com). You need to provide proof of identification to ensure security of spend-related transactions for you and Barry Callebaut.

### **What do I do if I am not the admin/owner of my Coupa Supplier Portal (CSP) account but I can't log in or don't have full access?**

Contact your admin to activate your account or set your permissions.

Some users in the Coupa Supplier Portal (CSP) have more power to activate and deactivate users and decide which customers and types of information they can access. Contact those admins to see why your access is not correct and have them fix it. If this is not possible, contact [supplier@coupa.com](mailto:supplier@coupa.com).

### **Why do I get the "unauthorised or expired account" error?**

Barry Callebaut has probably deactivated a setting on their end. Contact Barry Callebaut to find out if this was intentional. Ask them to check your supplier record or your supplier user in the system. If they can't solve the problem, they can contact Coupa support.

### **What do I do if I receive the "We're sorry, but something went wrong" error?**

Contact Barry Callebaut and ask them to open a support ticket because something is wrong on their end with a configuration or an update that they need to resolve with Coupa support.

## **Admin**

### **How do I enable two-factor authentication?**

After logging in to the Coupa Supplier Portal (CSP), go to Account Settings under your login name in the top right of the page to enable two-factor authentication.

### **How can I disable two-factor authentication?**

You can disable two-factor authentication from the Account Settings under your login name in the top right of the page.

### **How do I know that I'm connected to Barry Callebaut?**

Once you're signed in to the Coupa Supplier Portal (CSP), scroll down. On the bottom right of the page, you can see your Latest Customers.

### **What do I do if I am connected to a customer in Coupa and a new customer also wants to connect?**

You can provide your new Coupa customer with the same email address that you use to connect to your other Coupa customer(s). When your new customer has that email address, they need to send you an email invite to join. You are automatically connected to your new customer and your previous customers.

### **How do I add an employee?**

On the main menu, click on the Setup tab. On the Users tab, click on the Invite User button. Provide the required information in the window that opens.

### **Why can't I access POs?**

On the main menu, click on the Setup tab and check if you have access to the right roles and customers. If you have access but do not have the right roles or customers, add them. If you do not have access, ask your admin to give you access to the right roles or customers.

### **Why do I receive notifications if my notification preferences are turned off?**

Log in to the Coupa Supplier Portal (CSP) to check if the notifications are turned off. If they are turned off, contact your Coupa customer to open a ticket with Coupa support.

## **Orders**

### **How do I see Barry Callebaut's purchase orders?**

On the main menu, click on the Orders tab. If you are connected to more than one Coupa customer, select Barry Callebaut from the Select Customer dropdown menu. You can see their purchase orders only if you have access. Contact Barry Callebaut and ask them to give you access if you do not see them as a customer.

### **How do I change a price on a purchase order?**

You cannot change a price on a PO through the Coupa Supplier Portal (CSP). If you need a change order on a PO, talk to Barry Callebaut about their policies.