COUPA SUPPLIER GUIDE

COUPA SUPPLIER GUIDE

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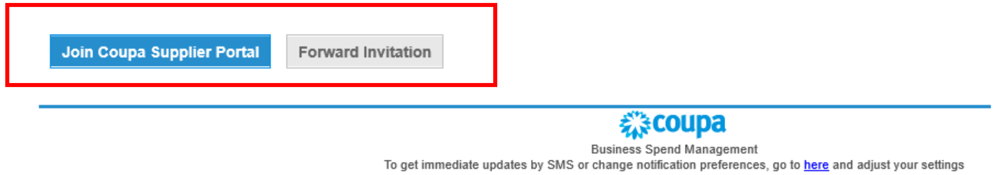
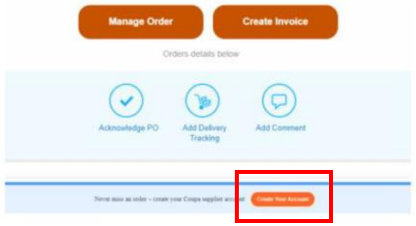
GETTING STARTED WITH COUPA SUPPLIER PORTAL (CSP)

How to get started:

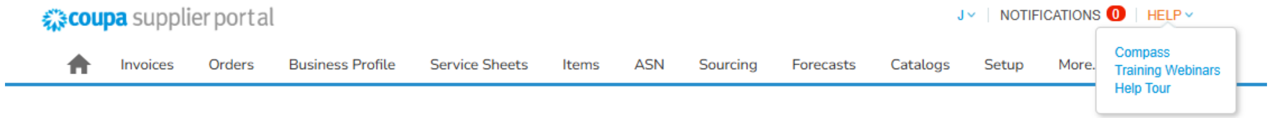
- ❑ An invite from Ingham's will be emailed asking you to register with the Coupa Supplier Portal (CSP). If you have not received any link, please contact your Ingham's representative.
- ❑ Once you've received the email, you can register by clicking the **Join Coupa Supplier Portal** button or Forward Invitation to another user within your company to start the registration process. If the CSP user is unable to see Ingham's in their Coupa account, please contact your Ingham's representative.



- ❑ If you have already set up a CSP account as a current Ingham's supplier, you can log in via https://supplier.coupahost.com and enter your Coupa registered email and password.
- ❑ You can also create an account by clicking the **Create Your Account** button from the purchase order (PO) email.



- ❑ Once you have logged in, you can access Coupa's **Take a Tour** section, demonstrating how to use the Coupa Supplier Portal (CSP). You can also watch recorded webinars via the Coupa page - [Webinar Recordings | Coupa Suppliers]



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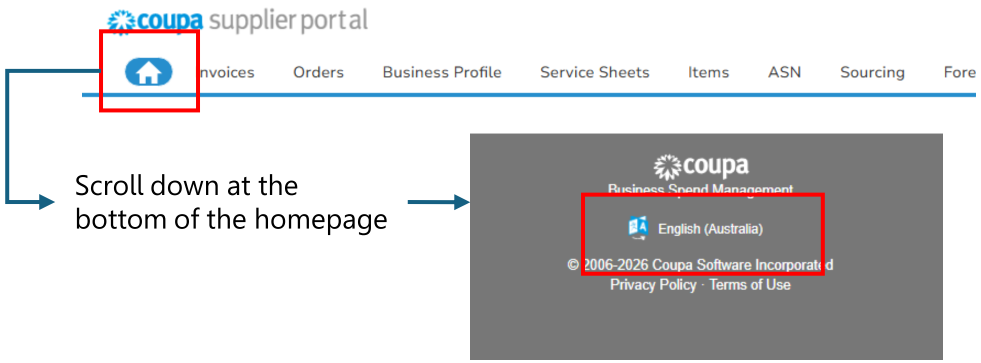
REQUIRED SETTINGS

- **Language & Date Format Setting:** Before you begin, confirm your CSP account language is set to **English (Australia).** This ensures all dates display in the correct format (DD/MM/YYYY) throughout the platform.
- **Multi-Factor Authentication (MFA) Setup:** You must set up MFA on your CSP account before you can create or submit invoices. MFA is a one-time setup that adds a security layer to your login. Refer to slide 16 for step-by-step instructions.
- **Legal Entity & Payment Method Configuration:** Invoices can only be created when linked to a legal entity. Your legal entity must be connected to Ingham's, which is done through your payment method settings. Without this link, you will not be able to generate any invoices. Refer to slides 9–15 for setup instructions.
- **Remit-To Address:** When creating an invoice, verify that your remit-to address is populated with your details. If this field is “no address selected”, you will need to click and choose information each time you raise an invoice — adding unnecessary steps to your process. Refer to slide 15 for guidance on how to check and update this.
- **Managing CSP User Access:** As a CSP account administrator, you can manage which users in your organisation have access to the portal. This includes updating individual permission levels and controlling which customers each user can interact with. Refer to slides 6-8 for instructions.



Important Note: Coupa may prompt you to join their advance subscription. Coupa is a free platform for all Ingham’s suppliers. The advance subscription fee is not required for you to create your CSP profile or transact with Ingham’s.

- ✓ Avoid using multiple channels. You can only use one e-invoicing channel, either Coupa Supplier Portal OR Supplier Actionable Notification (SAN) to create your invoices.

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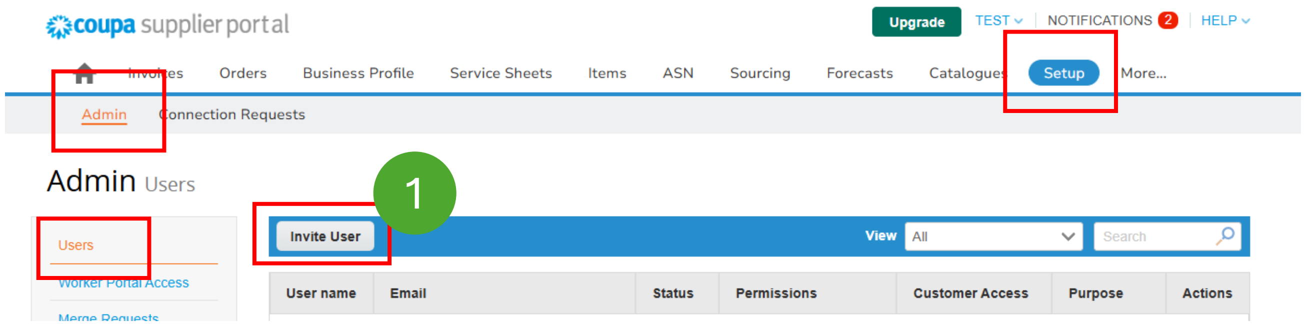
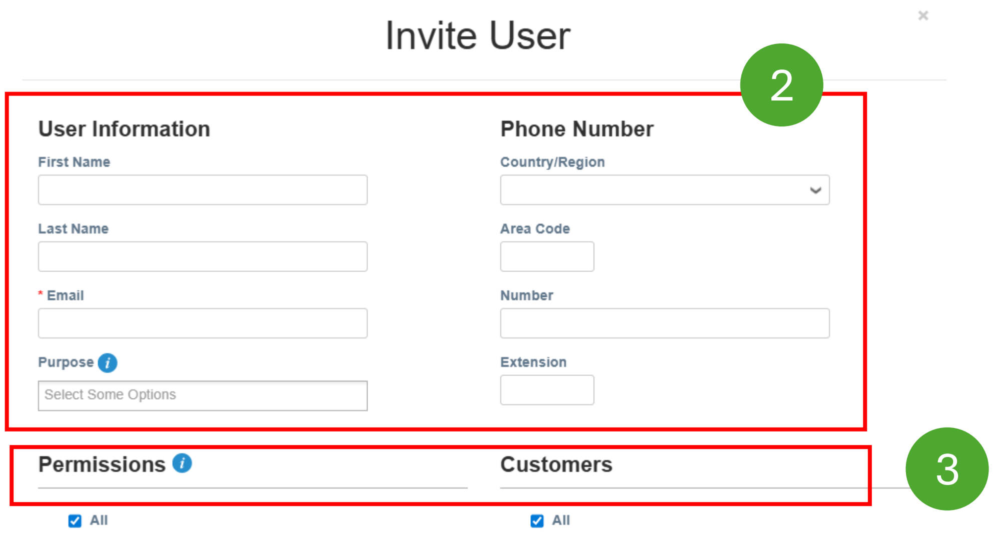
MANAGEMENT OF CSP USER ACCESS

- As a CSP account administrator, you can manage which users in your organisation have access to the portal. To be able to invite other users to create a CSP account and access Ingham's, proceed to Setup > Admin > Users.

1. Click the Invite User button
2. Input the name, email and the other details of the co-worker
3. Provide the necessary permissions and customer access they require
4. Once completed, an email will be sent to the user to accept and create their CSP account





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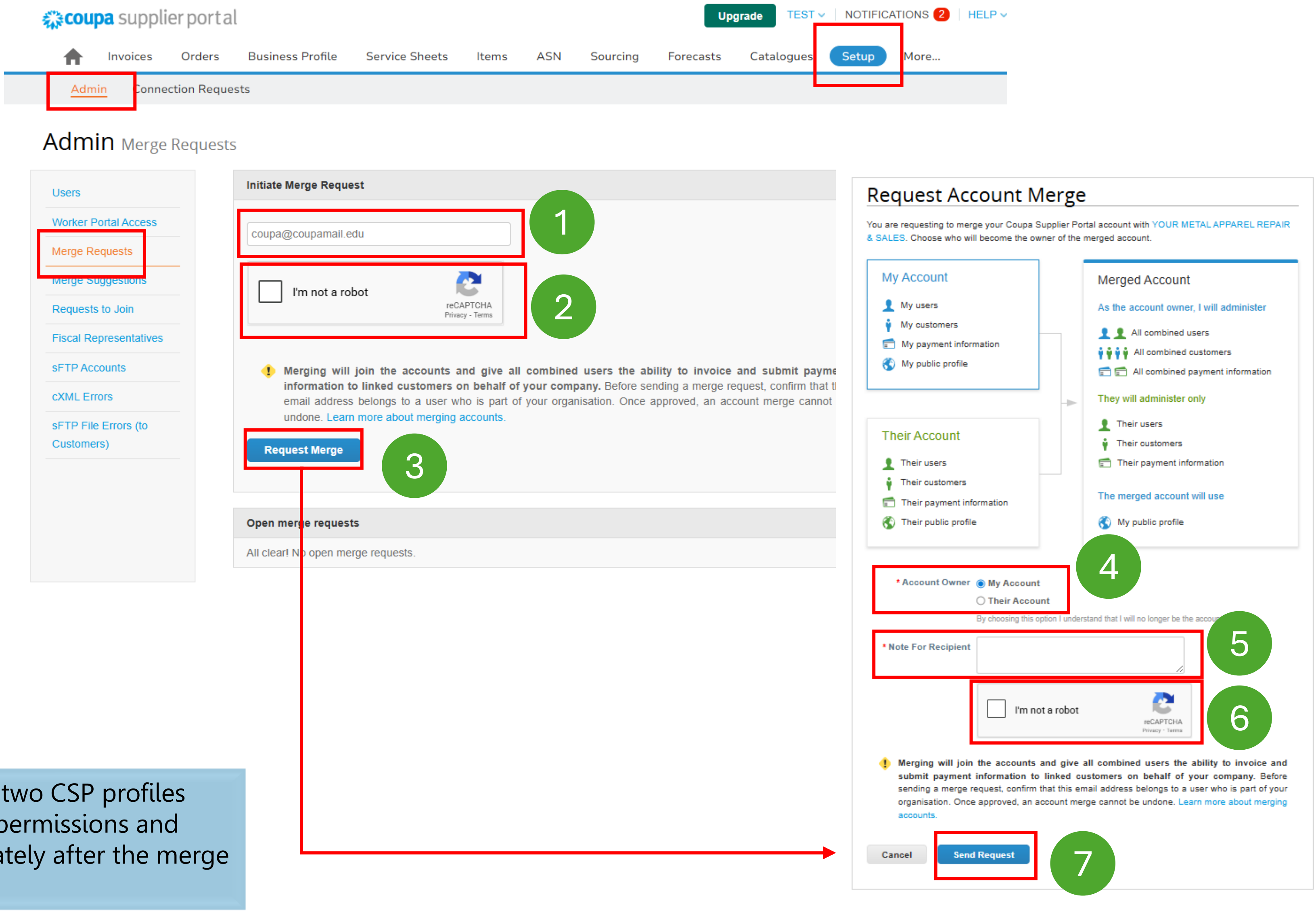
COMBINING/MERGING CSP ACCOUNTS (INITIATING THE MERGE)

- As a CSP administrator, you can merge another existing CSP account into your organisation's account. This consolidates two separate CSP accounts — for example, where a colleague registered separately — under one profile.
- Navigate to: **Setup** > **Admin** > **Merge Requests** then follow these steps:

1. Enter the **email address** of the CSP account you want to merge
2. Complete the required CAPTCHA
3. Click **Request Merge**. This will open the **Request Account Merge** page.
4. Select who will be the **account owner** after the merge. Note: the account owner retains administrator status; the other account defaults to regular user status. The CSP will display a visual preview of how data will be distributed between the two accounts.
5. Add a note in the Note for Recipient field if you wish to provide context to the other user (optional).
6. Complete the required CAPTCHA
7. Click Send Request.



Note on Ingham's access: Merging accounts consolidates two CSP profiles but does not automatically grant access to Ingham's. User permissions and customer access should be reviewed and configured separately after the merge is complete.

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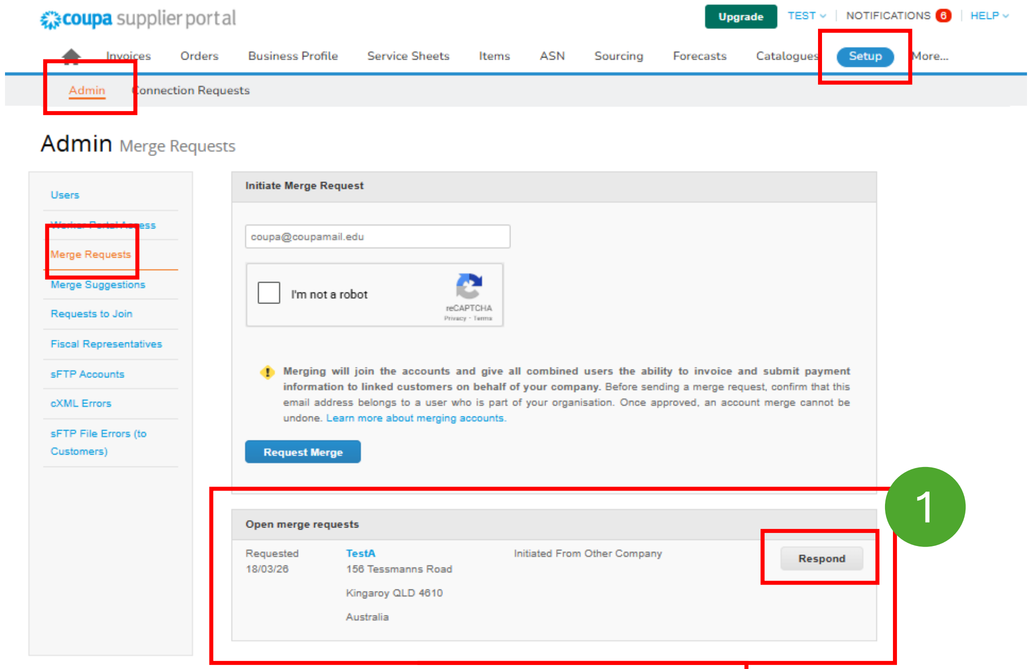
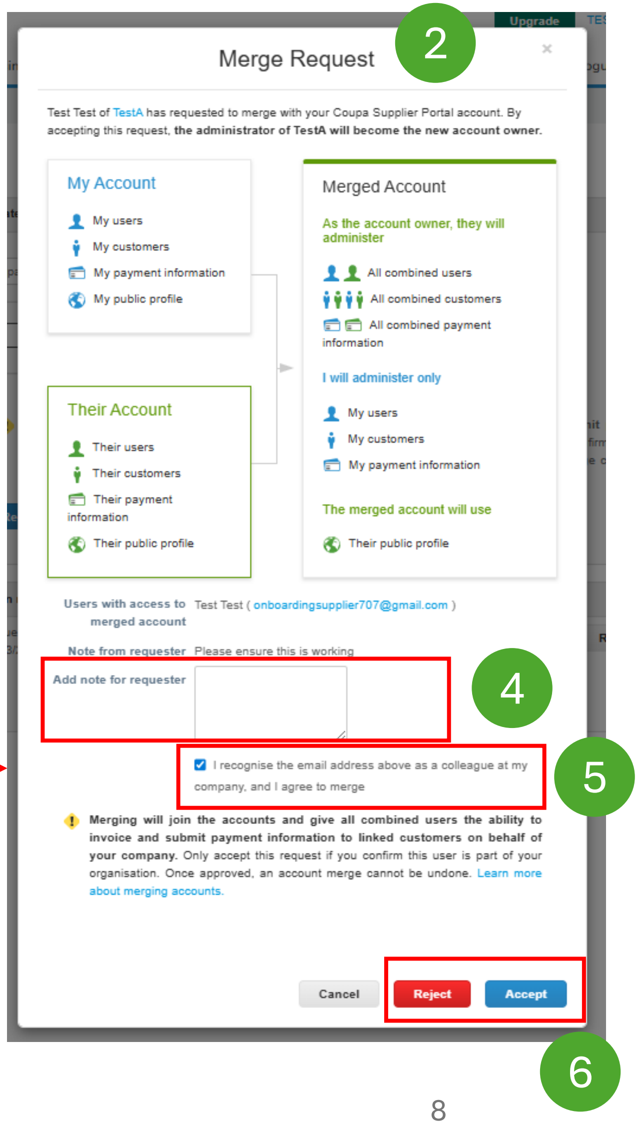
RESPONDING TO A MERGE REQUEST

- When a merge request is sent to you, you will receive an email notification containing a "View Merge Request" link. Clicking this link will direct you to log in to your CSP account, after which you will be automatically taken to the Merge Requests section.
- Alternatively, you can navigate via your CSP account manually. Go to Setup > Admin > Merge Requests

1. Locate the pending merge request and click **Respond.**
2. A window will open displaying the details of the request, including which account has been nominated as the account owner.
3. Review the request carefully. Note that the initiating user has already selected which account will hold administrator status after the merge — confirm you understand and agree with this before proceeding.
4. Add a note in the Note field if you wish to provide context (optional).
5. Click the tick-box confirming you recognise the email address
6. Click **Accept** to approve the merge, or **Reject** to decline.





- **Account merges cannot be undone.** Before accepting, verify that the request has come from a colleague within your organisation. Do not accept merge requests from unknown parties.

COUPA SUPPLIER GUIDE

CREATING A LEGAL ENTITY AND PAYMENT METHOD IN COUPA SUPPLIER PORTAL (CSP)

WHAT'S COVERED IN THIS SECTION?

Using Coupa:

- How to create a legal entity and add a payment method in Coupa Supplier Portal (CSP)
- How to set up multi-factor authentication (MFA)

- ✓ Creating a legal entity is required for all invoicing methods.
  - ✓ You will be required to set up multi-factor authentication (MFA) once to be able to do so. Please refer to slide 12 on how to set up your MFA.
- ✓ **Bank details** are taken from the supplier record in Ingham's Coupa system—not from your invoice, remit-to information, or your Coupa business profile. If you need to update your bank details, please contact your Ingham's representative to request a supplier update form.

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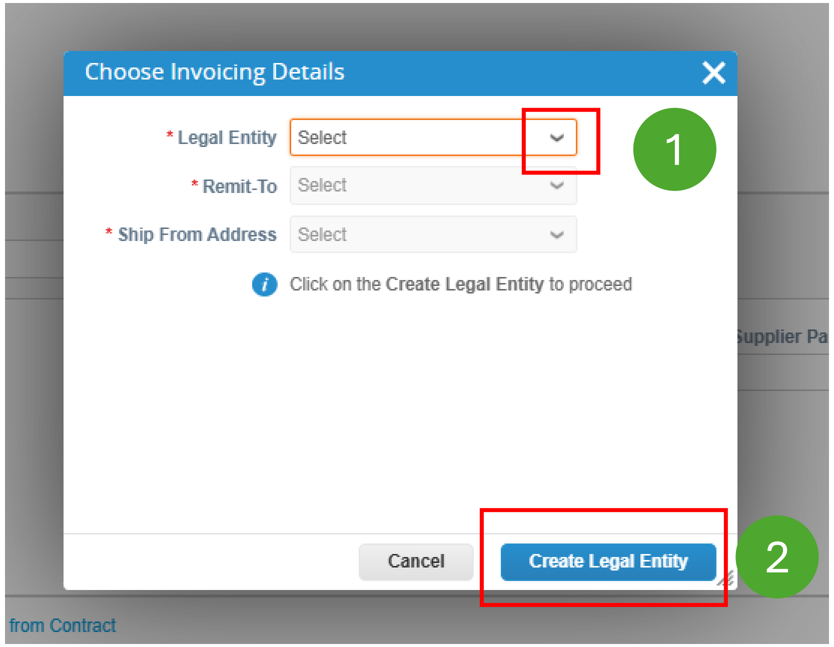
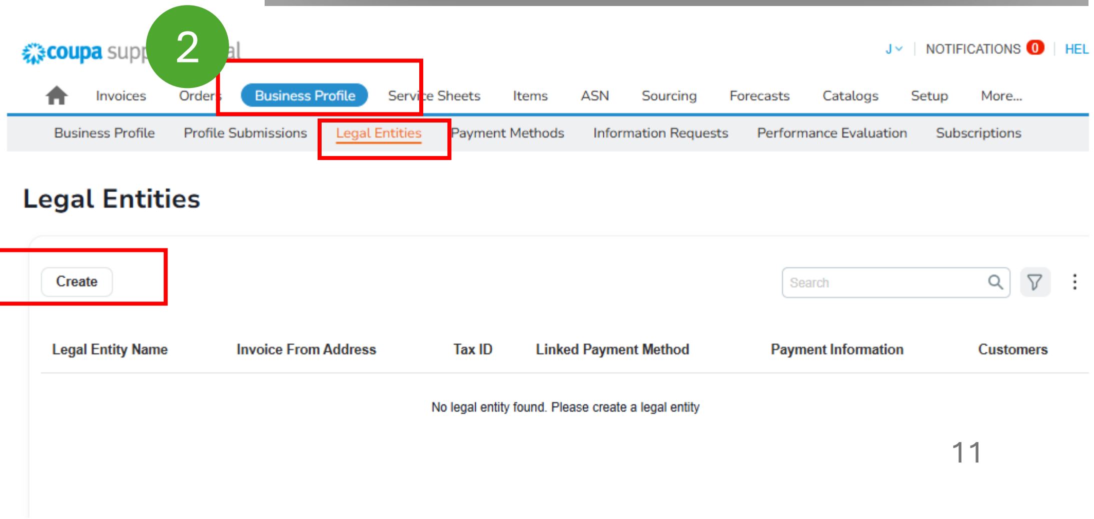
CREATING A LEGAL ENTITY IN COUPA SUPPLIER PORTAL (CSP)

A. In Coupa Supplier Portal (CSP), you will be asked to set up a legal entity if you are creating an invoice for the first time.

1. If you have an existing legal entity, please select your legal entity from the drop-down list.
2. If you don't have an existing legal entity, click the 'Create Legal Entity' button. Once selected, you will be directed to **the Business Profile tab** where you can create one.





Proceed to next slide for this section

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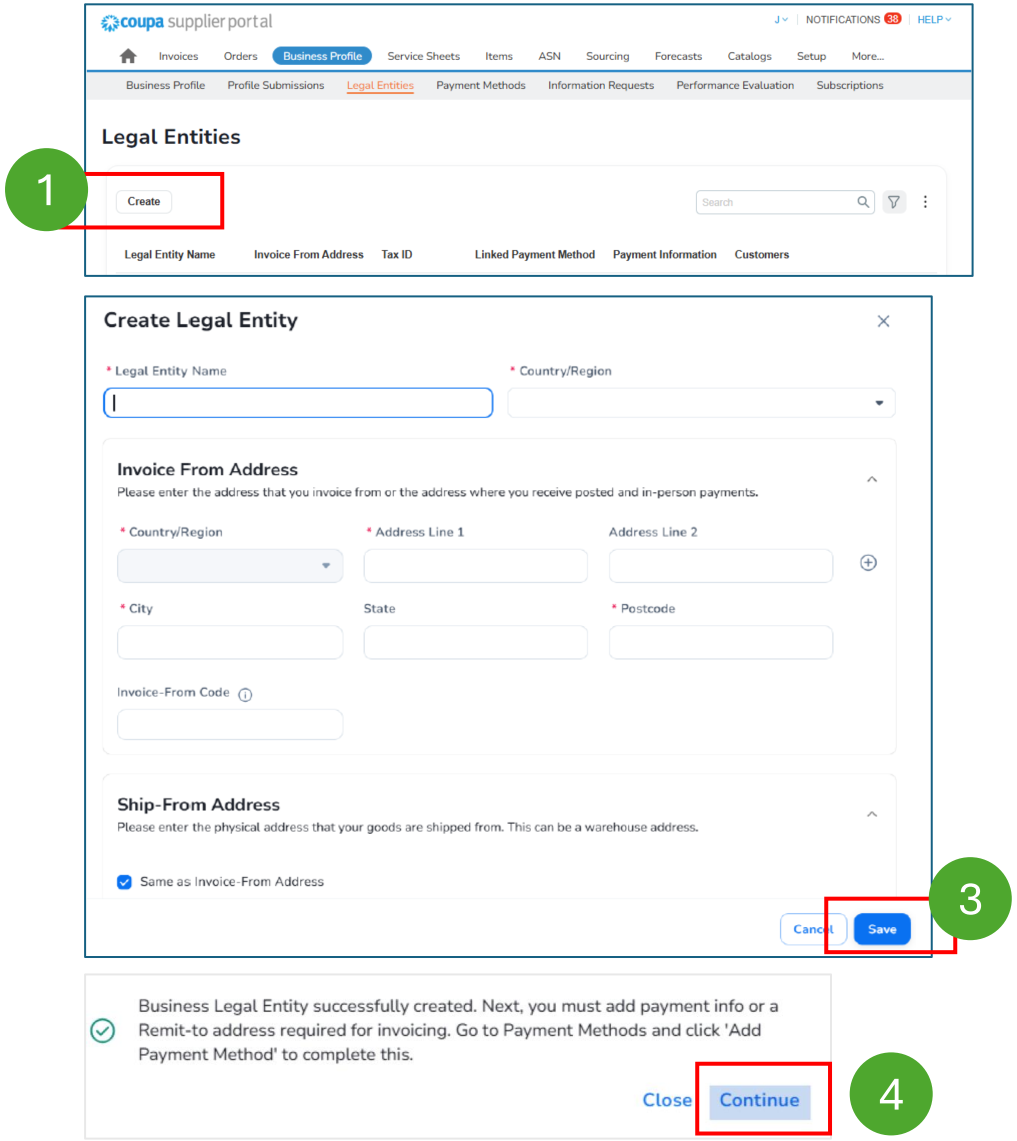
CREATING A LEGAL ENTITY IN COUPA SUPPLIER PORTAL (CSP)

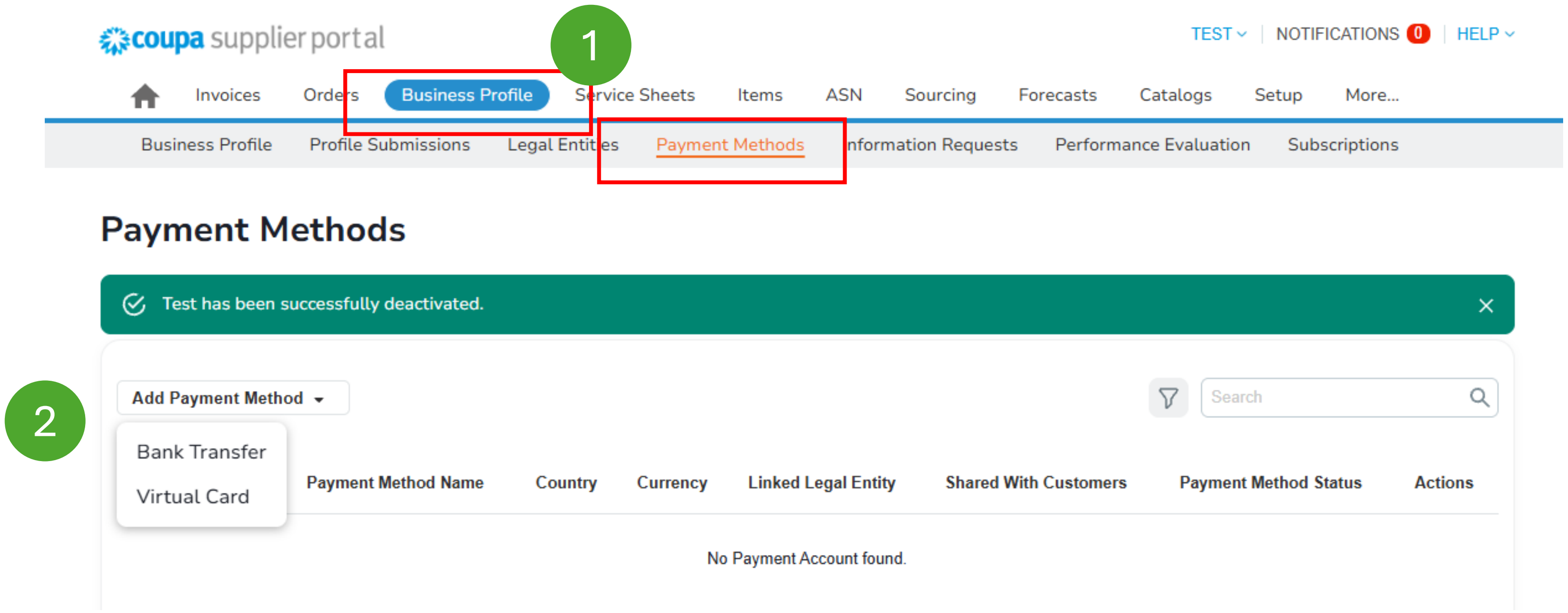
Creating a legal entity

1. Click Create.
2. Complete all mandatory fields marked with a red asterisk (*).
3. Click **Save** to proceed to the next page.
4. A pop-up will confirm that your Legal Entity has been created. Click **Continue.**
5. You will be redirected to the Payment Methods tab. Add your preferred payment method and banking details (proceed to next slide).



Adding a payment method

1. Navigate to Business Profile > Payment Methods.
2. Click the 'Add Payment Method' button. From the drop-down menu, select your preferred payment method.



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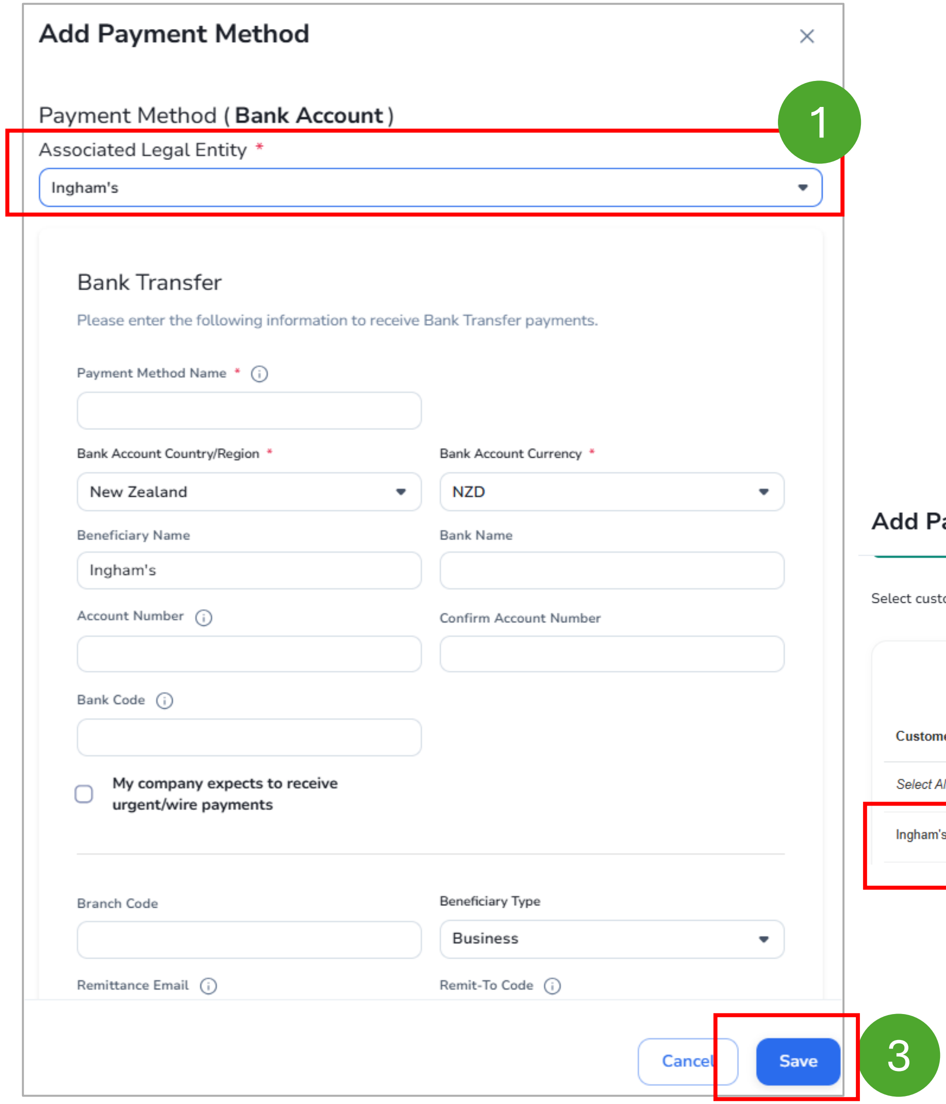
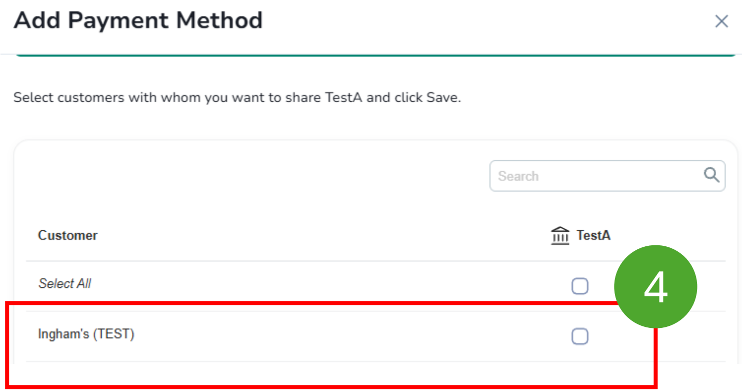
ADDING A PAYMENT METHOD IN COUPA SUPPLIER PORTAL (CSP)

1. Choose the legal entity from the drop-down menu that you want this payment method to be associated with.
   - Name the payment method so it can be easily identified if multiple methods are set up.
2. Complete all mandatory fields marked with a red asterisk (*).
3. Click Save to continue to the next page.
4. Select Ingham’s as your customer by checking the box.
5. If you work with multiple customers, select all applicable customers to enable this payment method for them.
6. Click Save to continue.
7. Your setup is complete. The new payment method will appear in the list, linked to the associated Legal Entity.





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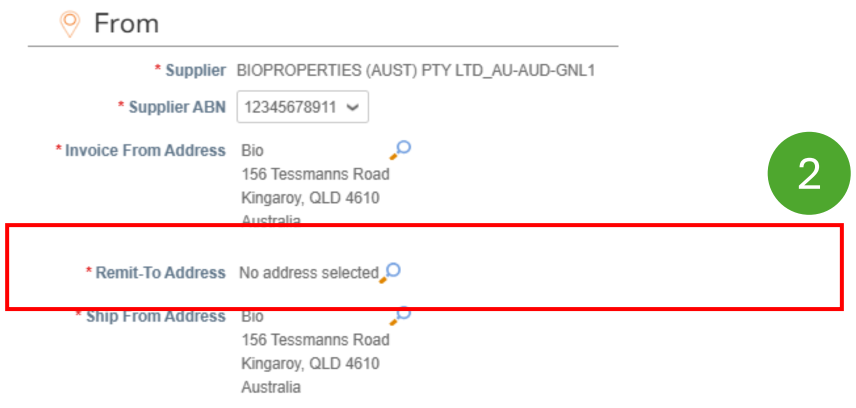
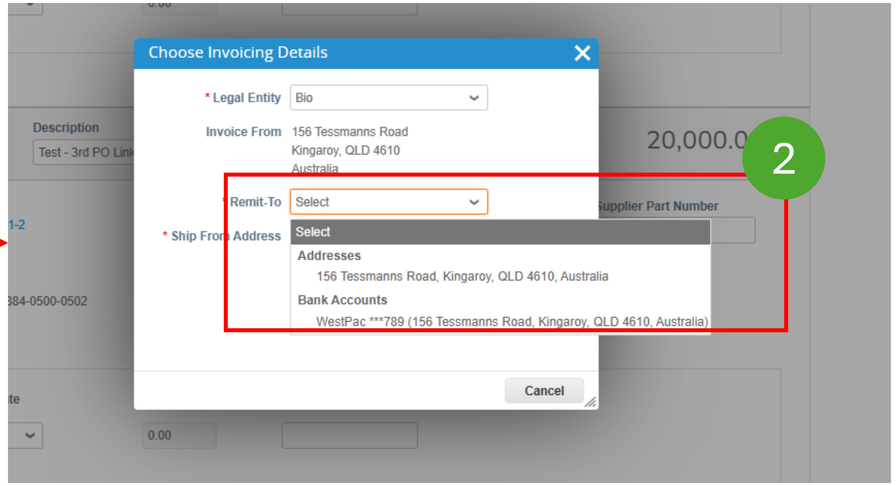
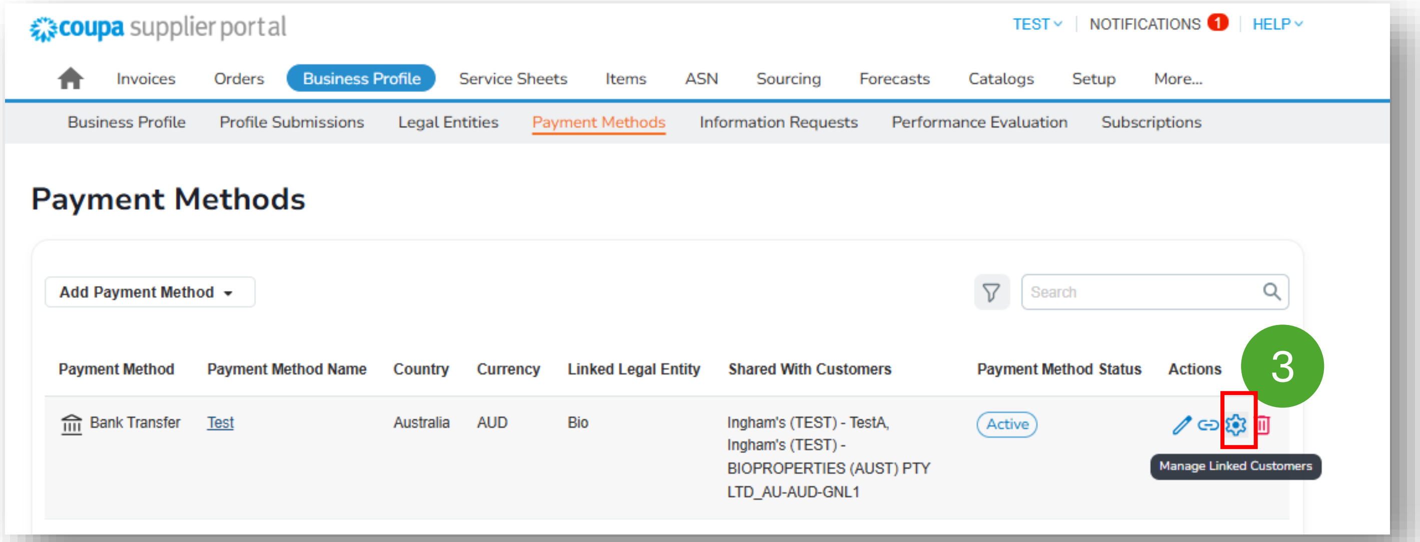
GUIDELINES

1. Once the legal entity and payment method have been set up, you'll now be able to create an invoice.
2. **Important:** Always check the **remit-to address** section of the invoice creation page. If it shows 'no address selected,' click this first before going through the invoice line details.
   - Under the remit-to field, you can choose to display the **address only** or include your **bank account** detail.
3. The **remit-to address is a mandatory field**. If you don't want to include the bank account details, unlink Ingham's in the payment method. Go to business profile > payment methods > click the 'Manage Linked Customers' icon.







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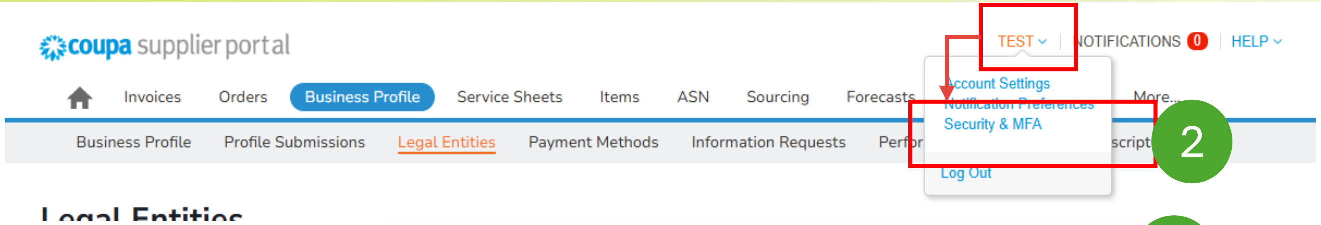
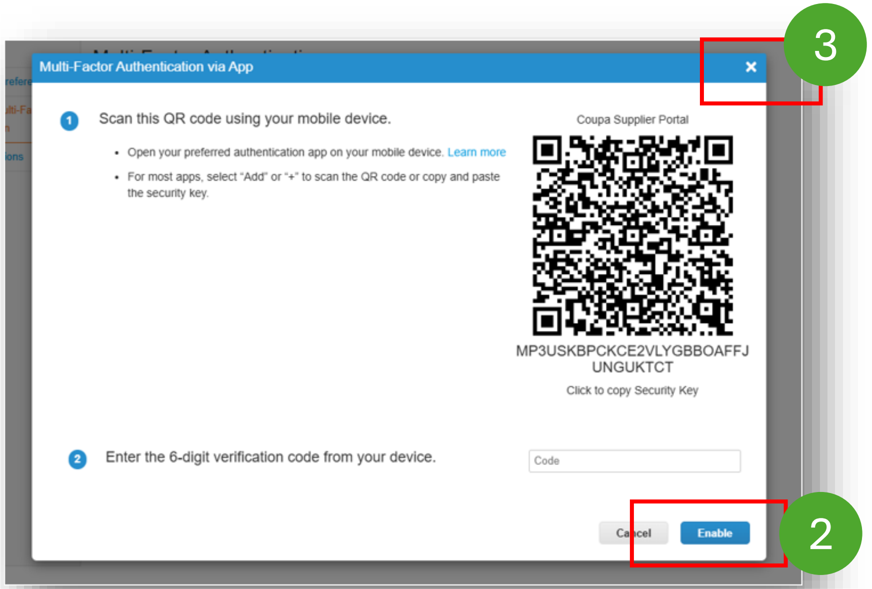
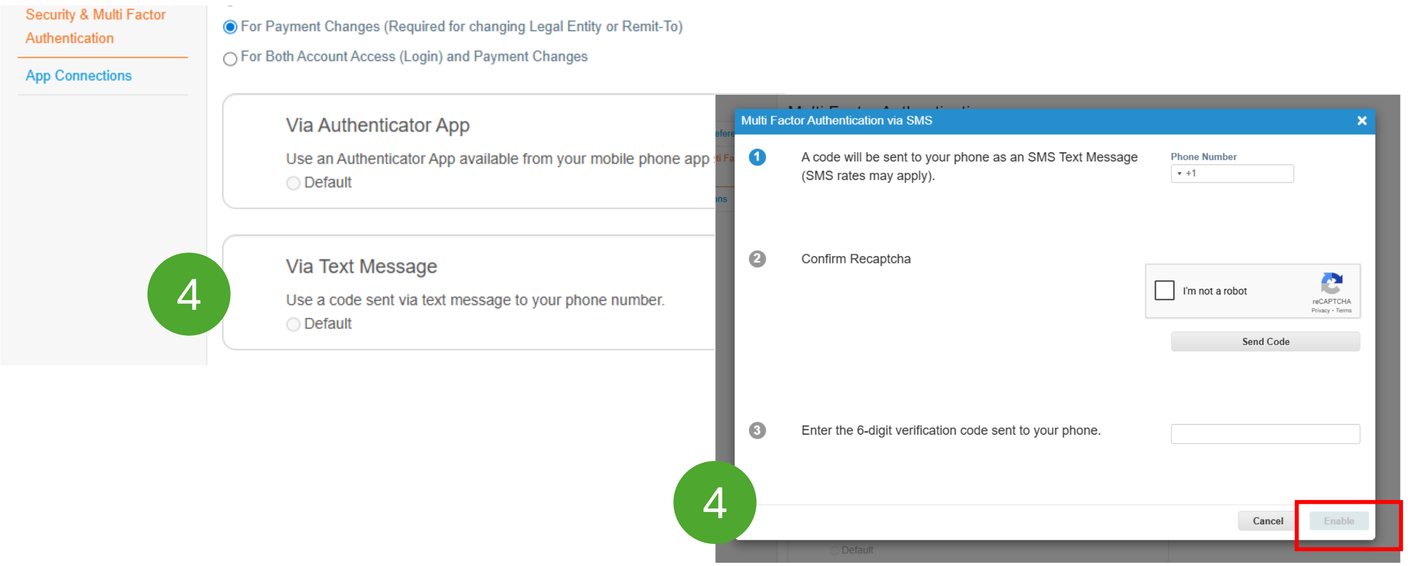
SETTING MULTI-FACTOR AUTHENTICATION (MFA)

1. When creating a legal entity in Coupa, you will be prompted to set up multi-factor authentication (MFA).
2. You can go directly to Security & MFA from your Coupa account settings. A pop-up window will appear prompting you to set up MFA **via an authenticator app**. If you prefer this method, you can follow the on-screen instruction and click the **enable** button.
3. If you prefer to create an MFA via **text message**, you can dismiss the prompt by clicking X in the top-right corner. You will be taken back to the MFA options page.
4. If you choose Via Text Message, a new pop-up will appear prompting you to enter your mobile number. Follow the on-screen steps and enter the verification code. Click Enable to finalise the setup.







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VIEWING ORDERS IN CSP

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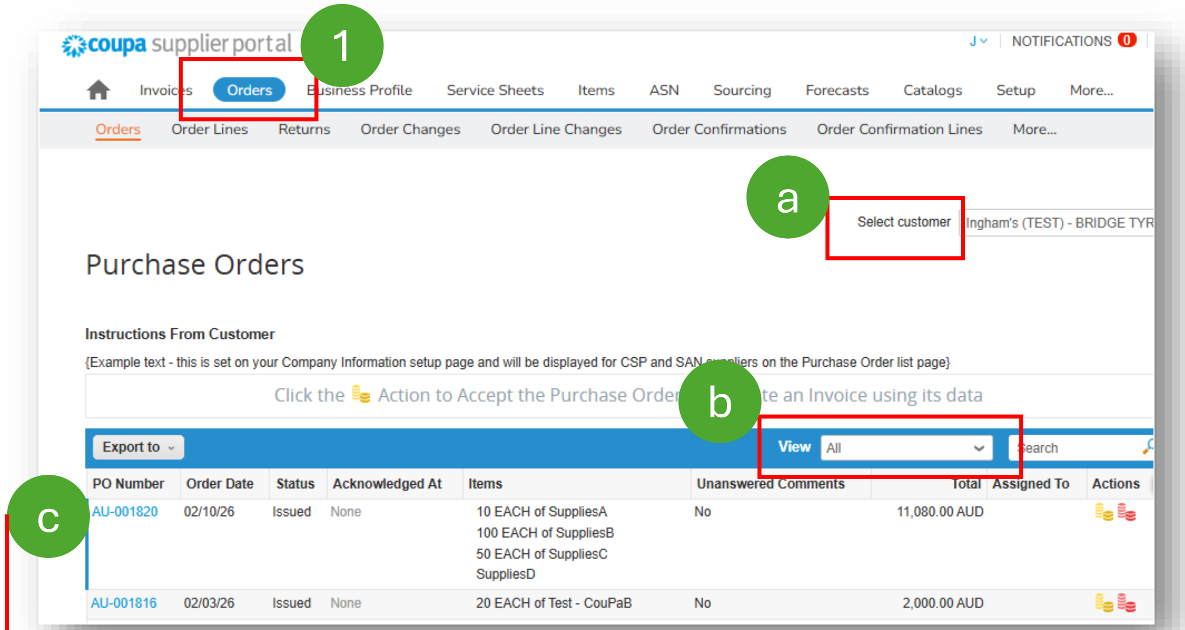
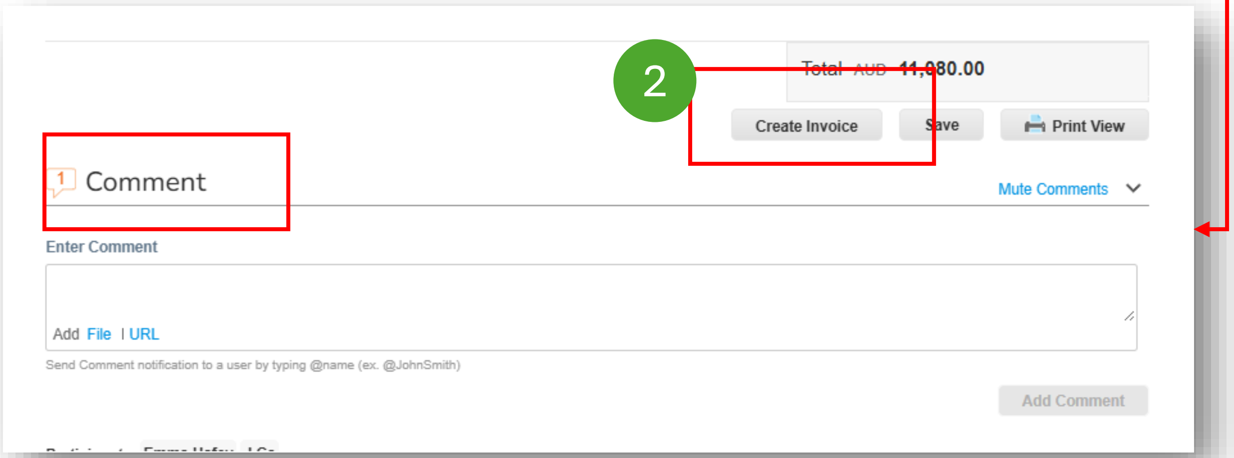
VIEWING ORDERS IN CSP

1. The Order tab displays all Purchase Orders (POs) that have been approved and issued by Ingham's. To access your orders:
   a) Select **Ingham's** in the **Select Customer** field.
   b) Use the **Custom View** field to filter and report on applicable PO lines.
   c) Click a **PO number** to view its details.
2. From within the PO, scroll down to create an invoice directly or add comments via the comment field.





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CREATING INVOICE FROM PURCHASE ORDER IN CSP

WHAT'S COVERED IN THIS SECTION?

Using Coupa:
How to create and submit an invoice in the Coupa Supplier Portal (CSP)

- ✓ You must be registered on the Coupa Supplier Portal (CSP) to generate invoices using this method.
- ✓ **All invoices must have a valid Purchase Order Number issued by Ingham's, prior to supplying products and services.** A valid PO starts with AU or NZ followed by 6 digits, e.g. AU-123456 or NZ-123456.

Guidelines on Invoicing

- The invoice must be raised against the correct site's purchase order (PO). Each PO is site-specific — invoices must match the PO issued by the relevant Ingham's site.
- For national account suppliers managing multiple sites - each invoice must reference the PO issued by the **specific** site being invoiced. Do not consolidate invoices across multiple sites under a single PO as it can be disputed. For exceptions, please contact your Ingham's representative.
- Only one (1) invoice number is permitted per invoice.
- Partial invoicing against a PO is permitted.
- If a PO line is not included in the invoice, **delete the PO line** to avoid the invoice being disputed. Refer to slide 24 for instructions.
- Before submitting, verify the following to avoid an invoice dispute:
  - The correct tax rate has been applied.
  - The invoice is raised for Ingham's only, not for other customers.
  - PO line details are accurate.
  - The attached file matches the Coupa invoice.
- Adding a **non-PO line** is not allowed. Reach out to your Ingham's representative should there be a need to change the PO.
- Invoice status can be tracked at any time under the Invoices tab

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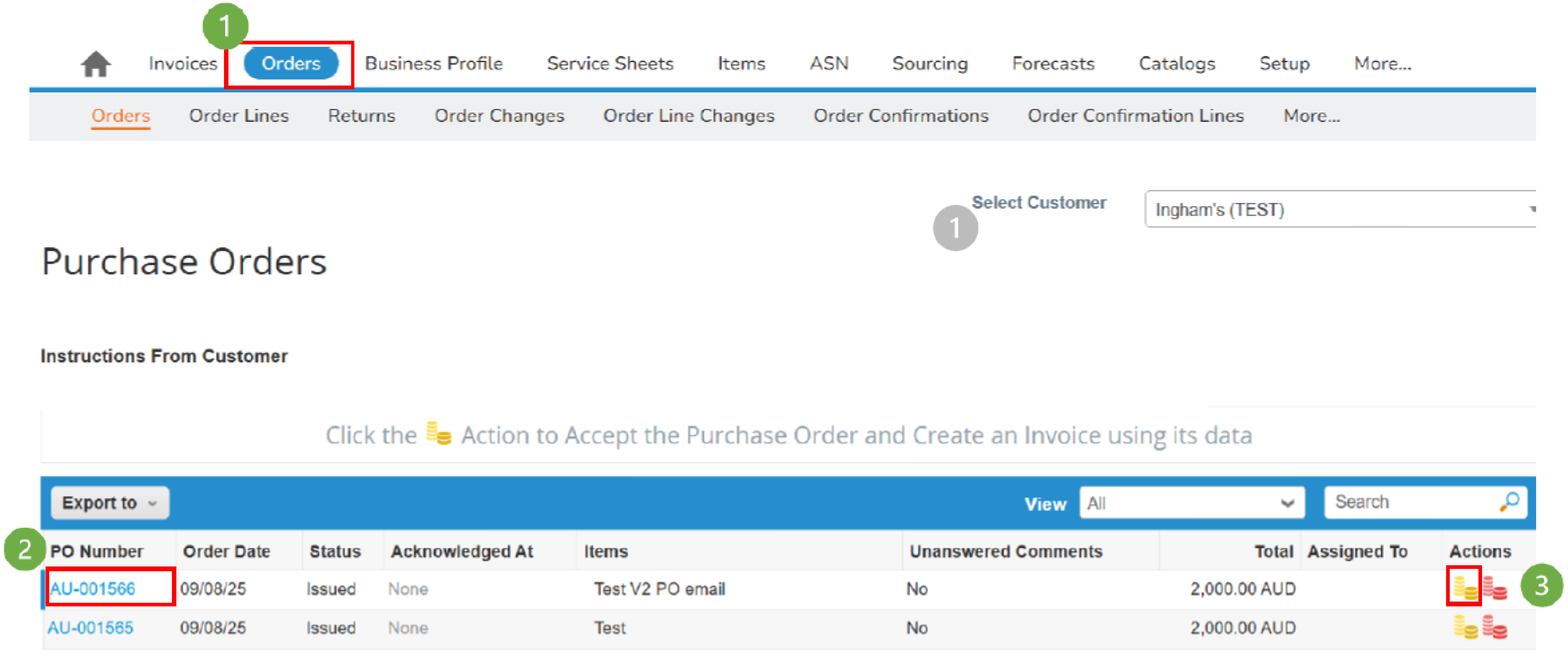
CREATING AN INVOICE FROM PURCHASE ORDER IN THE CSP

1. Go to the Orders page
2. Locate the Purchase Order (PO) number you wish to raise an invoice against
3. Click on the Create Invoice using the Gold Stack icon



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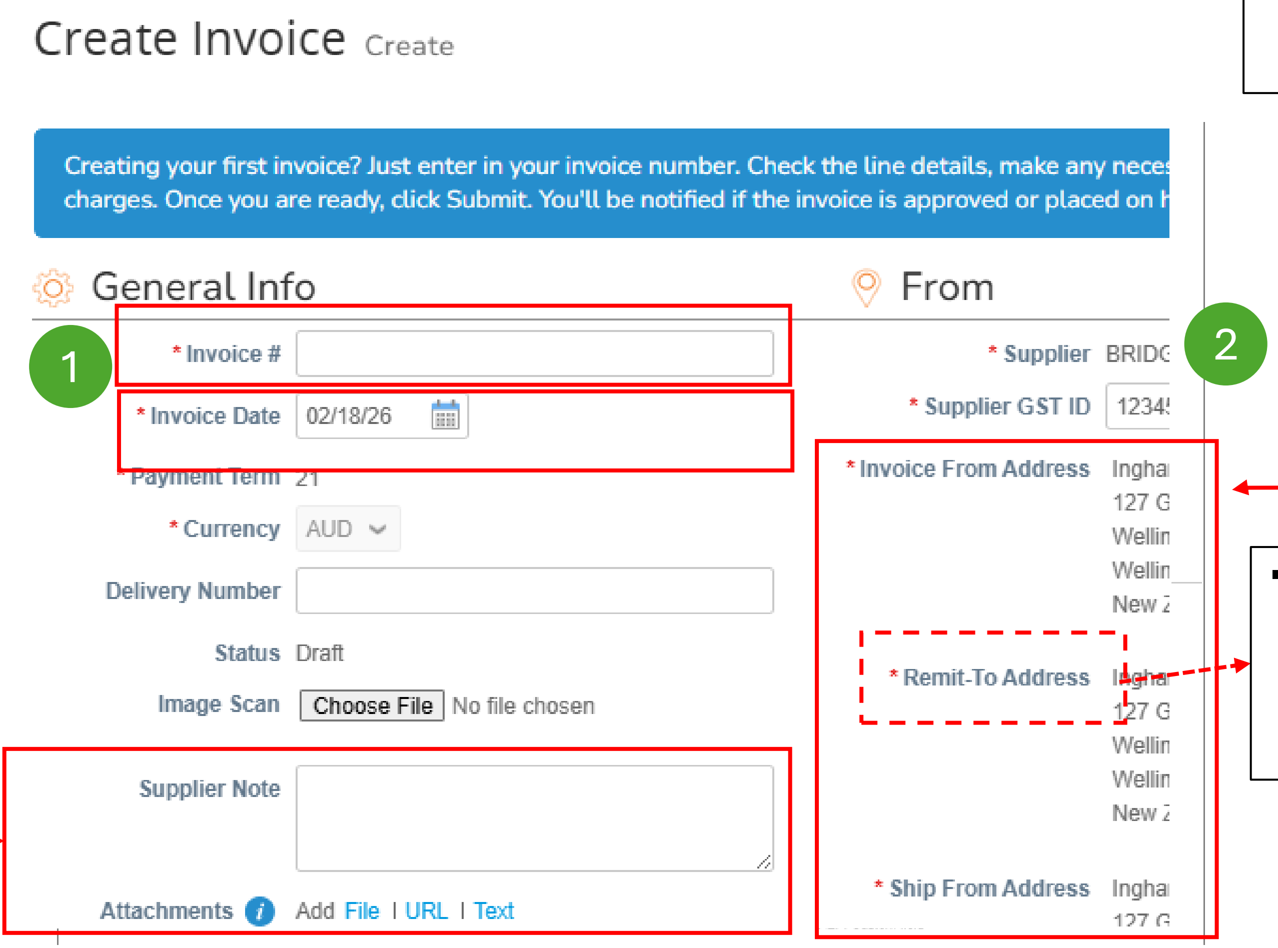
CREATING AN INVOICE FROM PURCHASE ORDER IN THE CSP

The invoice creation page opens up with pre-populated information from the Purchase Order (PO) in the invoice entry. Follow the steps to complete the invoice (note all fields with * are mandatory and must be populated)

1. General information section:
- Invoice Number
- Invoice Date (will default to **today**. Ensure it is the same as your attached invoice copy)

2. Supplier Info – The 'Remit To' section will populate automatically (after you have completed your initial set-up in your CSP account)



- Derived from the legal entity you've created and shared

- If the remit-to is showing "no address selected," refer to slide 15 for instructions

- In this section, you can add any notes about the delivery/service that you've provided.
- You can also attach supporting files (e.g. **tax invoice generated from another system**, packing list, delivery list). Attaching supporting documents is highly recommended, as it can help validate CSP invoices should any issues arise.

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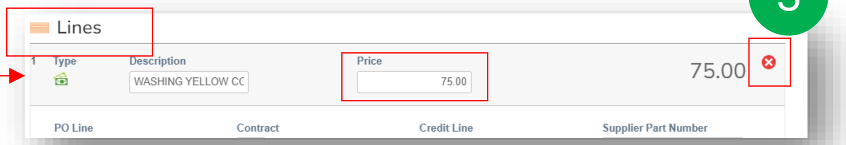
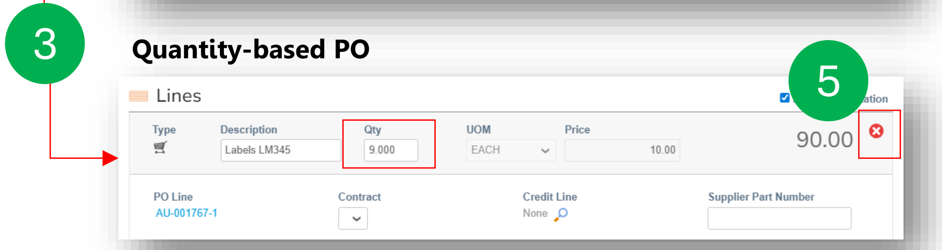
CREATING AN INVOICE FROM PURCHASE ORDER IN THE CSP

3. Below the general info section is the **Lines** section. Update the relevant fields based on your PO type:
    - **Amount-based PO**: Review and update the **Price** field for each line to match your invoice amount (**enter the GST-exclusive amount**).
    - **Quantity-based PO:** Update the Quantity field to match your invoice.
    - **Important Note:** If the PO price or quantity is incorrect, contact your Ingham's representative before proceeding with invoicing.
4. Under Taxes section, select the relevant Tax code
    - ❑ AU Suppliers
        - ➢ Select GST Taxable 10% for GST-applicable lines (do not select Rabo Taxable 10%). Select 0% for non-GST lines.
        - ➢ If invoicing multiple PO lines with different GST rates, select the Line Level Taxation checkbox.
    - ❑ NZ Suppliers
        - ➢ Select GST Taxable 15% for GST-applicable lines (do not select 9%, Exempt, or Reverse Charge; Select 0% for non-GST lines.
    - ➢ **Important Note:** Selecting an incorrect tax code will result in the invoice being disputed.
5. Continue for all lines in the invoice entry. **Delete any lines** that are NOT required for your invoice, using the ⊗ icon). These lines can still be invoiced in the future, provided the PO line has not been fully invoiced or closed.
6. Select Calculate. Ensure total is correct and click Submit to send your invoice.

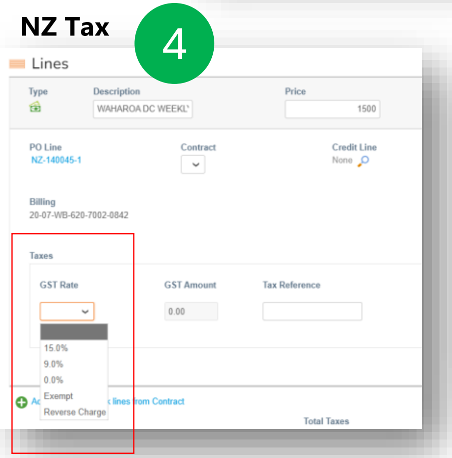
Amount-based PO



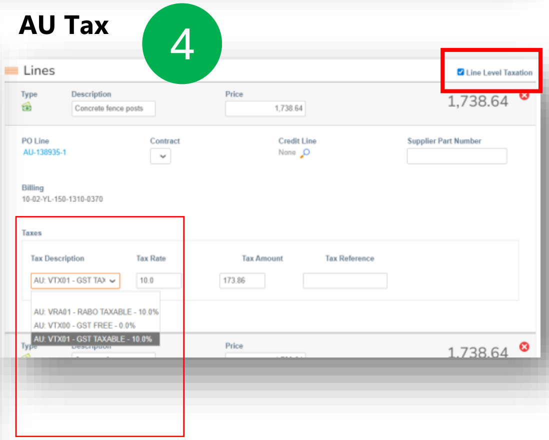
Quantity-based PO



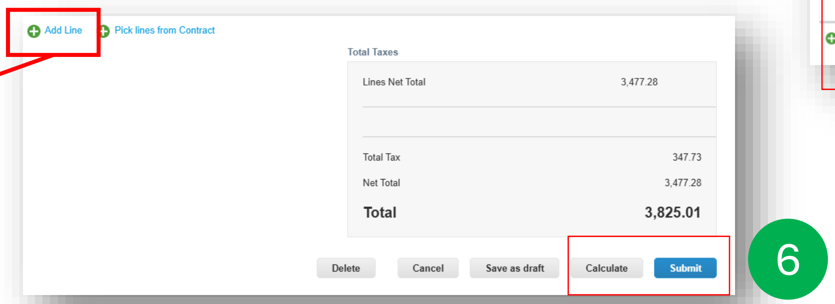
NZ Tax



AU Tax



- Adding non-PO lines is not permitted. Contact your Ingham's representative if any PO changes are required.



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CREATING A CREDIT NOTE AGAINST AN INVOICE

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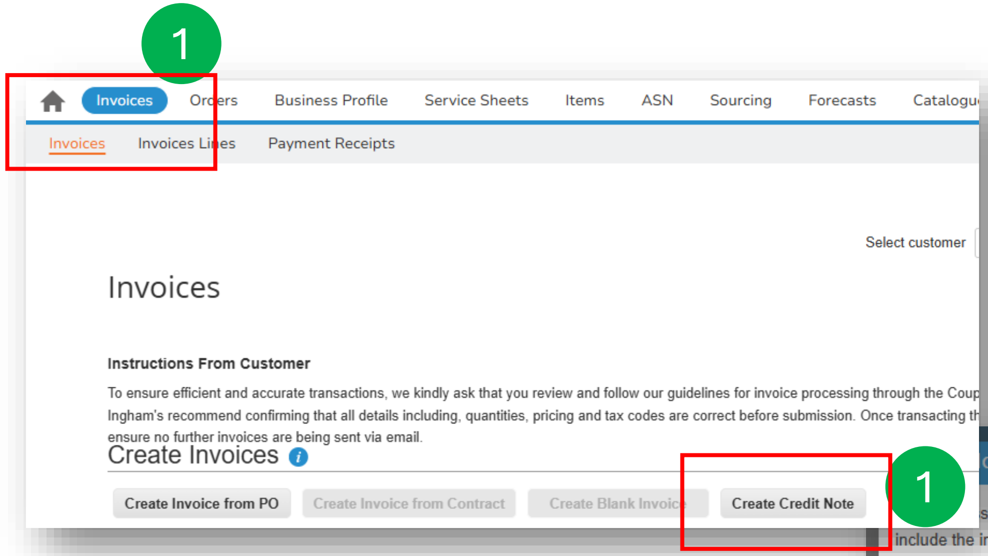
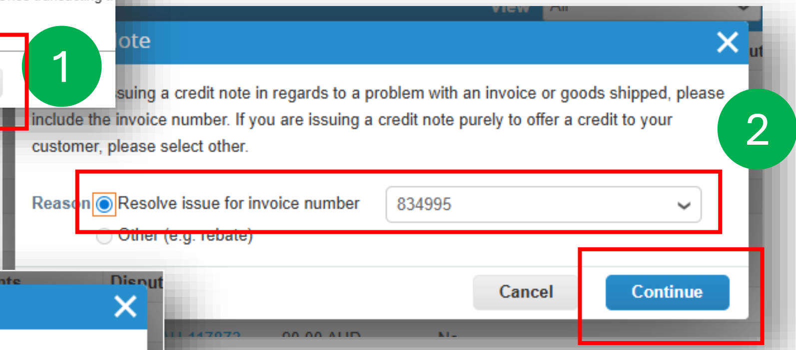
CREATING A CREDIT NOTE AGAINST AN INVOICE

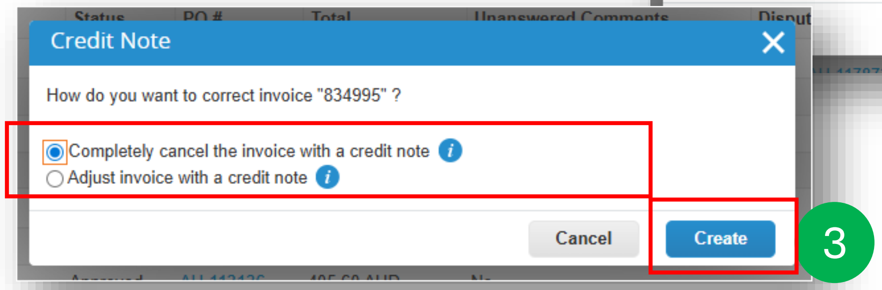
Credit Notes are to be raised against an existing invoice if the purpose is to negate that original invoice charge. There are two methods on how to create a credit note in Coupa. Use the following method to raise a credit note to negate an existing invoice entry (or partial):

1. Open your Coupa Supplier Portal (CSP) and navigate to the Invoices tab. Click Create Credit Note button
2. In the popup box ensure the 'Resolve issue for invoice number" is ticked and select the relevant invoice number from the drop-down list. Select Continue
3. Choose how you want to resolve the issue: Select if you want to 1) Completely cancel the invoice or 2) Adjust the invoice with your credit note
4. Select Create

- An invoice entry needs to exist to be able to upload a credit note against
- When creating a credit note, use the same invoice number but with a 'CN' at the beginning of the number. For example, if your invoice number is **#1234**, the credit note should be #**CN1234**
- The **credit note's date should be the original invoice's date.**







Credits for Rebates or similar requirement are to be raised directly against a Purchase Order – please contact your Ingham's representative for assistance.

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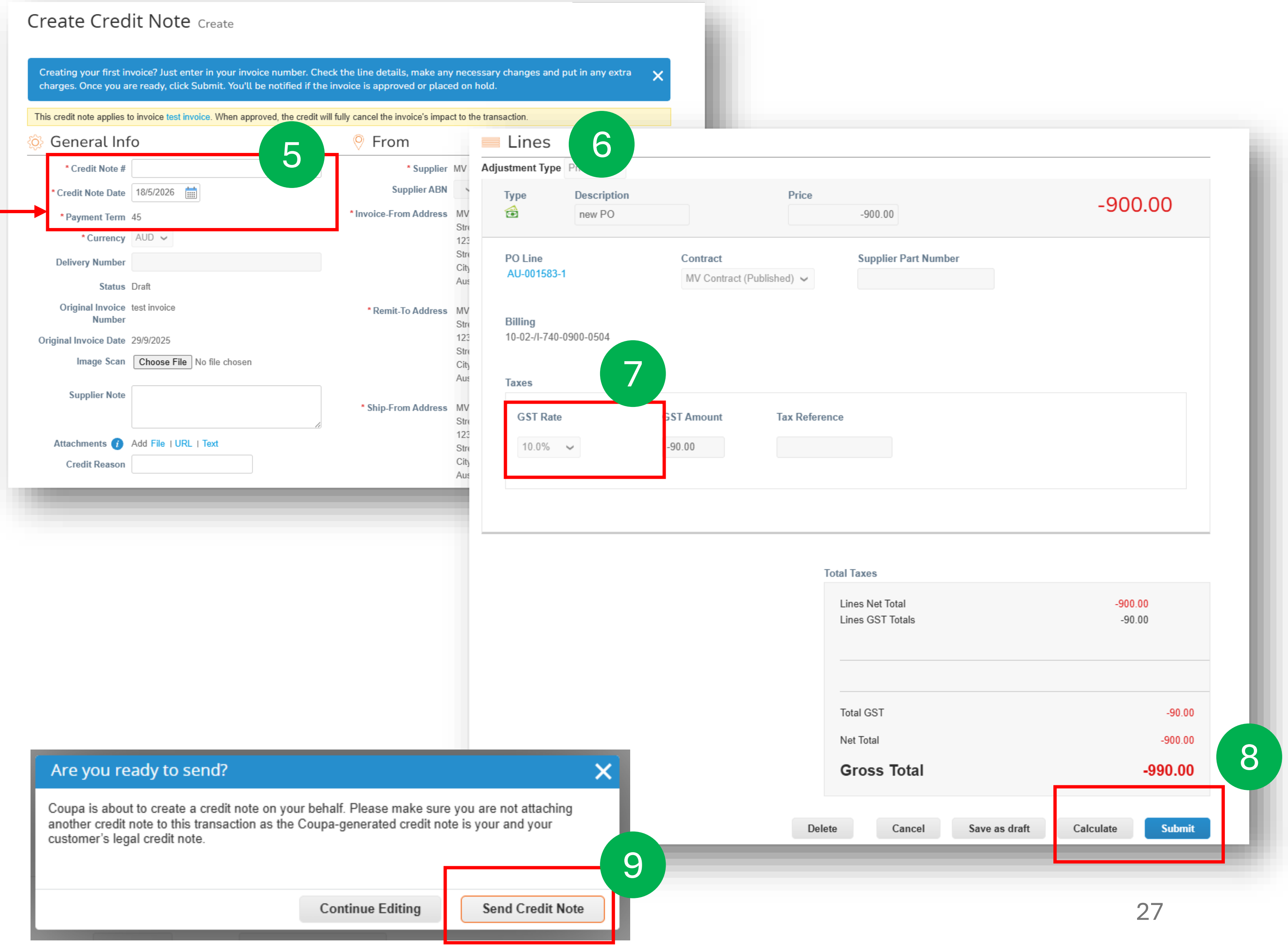
CREATING A CREDIT NOTE AGAINST AN INVOICE

5. The ‘Create Credit Note’ screen of your chosen PO opens. Enter your Credit Note # into this field.
   Important notes:
   - When creating a credit note, use the same invoice number but with a ‘CN’ at the beginning of the number. For example, if your invoice number is #1234, the credit note should be #CN1234.
   - The **credit note’s date should be the original invoice’s date.**
6. Scroll down to the lines section and enter the value (ensure it is a negative value e.g. -900.00) for all relevant lines required
   - Note: You can enter a partial value if the credit amount is lesser than the invoice line
7. Under Taxes section, check that the GST rate is correct. Review slide 24 if unsure of what GST rate is applicable
8. Select Calculate. Ensure total is correct and click Submit
9. A confirmation prompt will appear asking you to verify before sending. Click Send Credit Note to proceed
10. A **Create Replacement Invoice** prompt will appear. Click Yes to create a new invoice to replace the cancelled one, or No to skip.



HOW TO UPLOAD A CREDIT NOTE AGAINST AN INVOICE

- ✓ A credit note cannot be created against the original invoice if the purchase order (PO) linked to that invoice has been fully invoiced and paid.
  - ✓ For this scenario, please reach out to your Ingham's representative or email supplier.enablement@inghams.com.au.

COUPA SUPPLIER GUIDE

RESOLVING A DISPUTED INVOICE

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RESOLVING A DISPUTED INVOICE

1. Ingham's will Dispute an invoice if it is incorrect. Each disputed invoice will include a comment to highlight the reason for the Dispute. Suppliers will need to action the entry to either cancel or resubmit. Actioning Disputed invoices is managed via the Coupa Supplier Portal (CSP).
   - Any invoice entry that is disputed needs to be negated at the Supplier's end (like cancelling out that entry). On the right-hand side of the disputed invoice entry is a square (hover over it and it'll reveal 'Resolve')

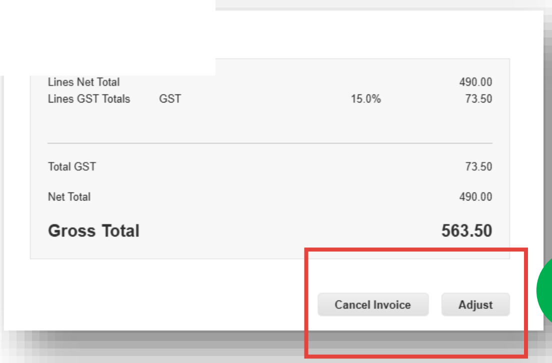
1

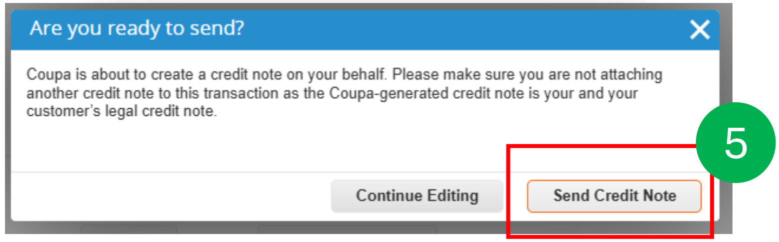
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
INV 7236	12/5/26	Disputed	NZ-033739	563.50 NZD	Yes	PO Number missing or incorrect	Resolve

2

2. Click the Resolve button
3. At the bottom, you are given the option to **cancel or adjust**
   - Selecting either option will bring up a credit note screen. This is an entry to negate the original invoice entry. When creating a credit note, use the same invoice number but with a 'CN' at the beginning of the number. For example, if your invoice number is #1234, the credit note should be #CN1234. The credit note's date should be the original invoice's date.
4. Follow the prompts in creating a credit note, and ensure all details are correct and accurate. Select Calculate and then Submit.
5. A confirmation prompt will appear asking you to verify before sending. Click **Send Credit Note** to proceed
6. A **Create Replacement Invoice** prompt will appear. Click Yes to create a new invoice to replace the cancelled one, or No to skip.
   - If creating a replacement invoice, you will need to create a new invoice number

- When creating a credit note, use the same invoice number but with a 'CN' at the beginning of the number. For example, if your invoice number is **#1234**, the credit note should be #**CN1234**
- The **credit note's date should be the original invoice's date.**
- Use a **new invoice number** for the replacement invoice,





COUPA SUPPLIER GUIDE

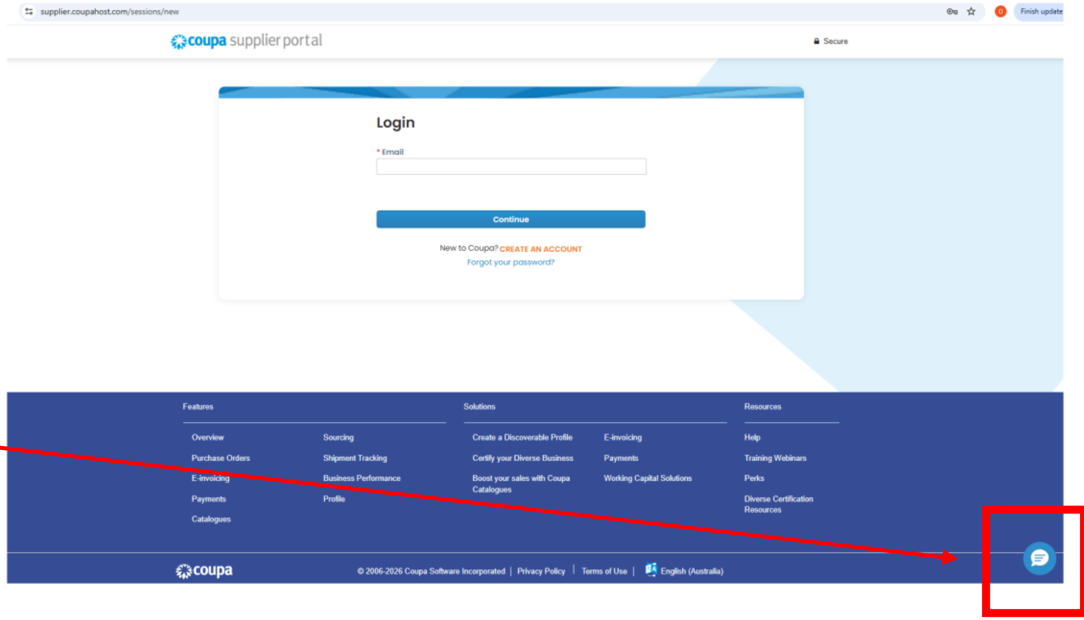
ADDITIONAL RESOURCES

For more information on Coupa Supplier Portal (CSP), you can refer to Coupa’s official documentation on their website below:

- [For Suppliers | Coupa]
    - https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers#Invoices
- [Webinar Recordings | Coupa Suppliers]
    - https://supplier.coupa.com/webinar-recordings/

If you encounter difficulties in using the system
(e.g., CSP access, MFA issues), please contact supplier@coupa.com

You can also contact Coupa support via the site’s chat icon.



COUPA SUPPLIER GUIDE

SUPPLIER FREQUENTLY ASKED QUESTIONS (FAQ)

1

What is the Coupa Supplier Portal (CSP)?

The CSP is a free, secure online platform Ingham's uses to manage supplier transactions. Through it, you can receive purchase orders, submit invoices, and track transaction status — all in one place.

2

Is there a cost to join the CSP?

No. Registering and using the CSP is completely free for all Ingham's suppliers. You will receive an email invitation from us to get started. If you haven't received any, please contact your Ingham's representative.

3

I have an existing CSP account. Do I need to re-register?

No. Simply use your existing account and connect to Ingham's when you receive our invitation. There is no need to create a new account. If you don't see Ingham's in the list, please contact your Ingham's representative.

4

How do I submit an invoice to Ingham's?

Log in to the CSP, go to the Orders tab, open the relevant PO, and select the option to create an invoice directly from it. Ensure all details match your tax invoice before submitting.

5

Does my invoice need to reference a PO number?

Yes. All invoices must reference a valid Ingham's Purchase Order number. If you haven't received a PO, contact your Ingham's representative before invoicing.

6

What does 'Pending Receipt' mean on my invoice?

'Pending Receipt' means the Ingham's team is confirming delivery of the goods or services in the system. Once receipted, your invoice will be matched and progress to approval, unless there is an issue with the invoice (e.g., amount/quantity)

7

Can I attach my own tax invoice copy when submitting?

Yes. When creating an invoice in the CSP, you can attach a copy of your tax invoice.

8

What do the invoice statuses mean?

Draft: saved, not yet sent. **Processing:** received and under review. **Approved:** queued for payment. **Pending Receipt:** awaiting goods confirmation. **Disputed:** requires correction.

9

Can I make changes after submitting an invoice?

Submitted invoices are locked. If a correction is needed, contact your Ingham's representative to have it disputed. You can then resubmit a corrected version.

10

How do I raise a credit note or correct a billed invoice?

In the CSP, go to the Invoices tab and select 'Create Credit Note' against the relevant invoice. For further assistance, contact your Ingham's representative.