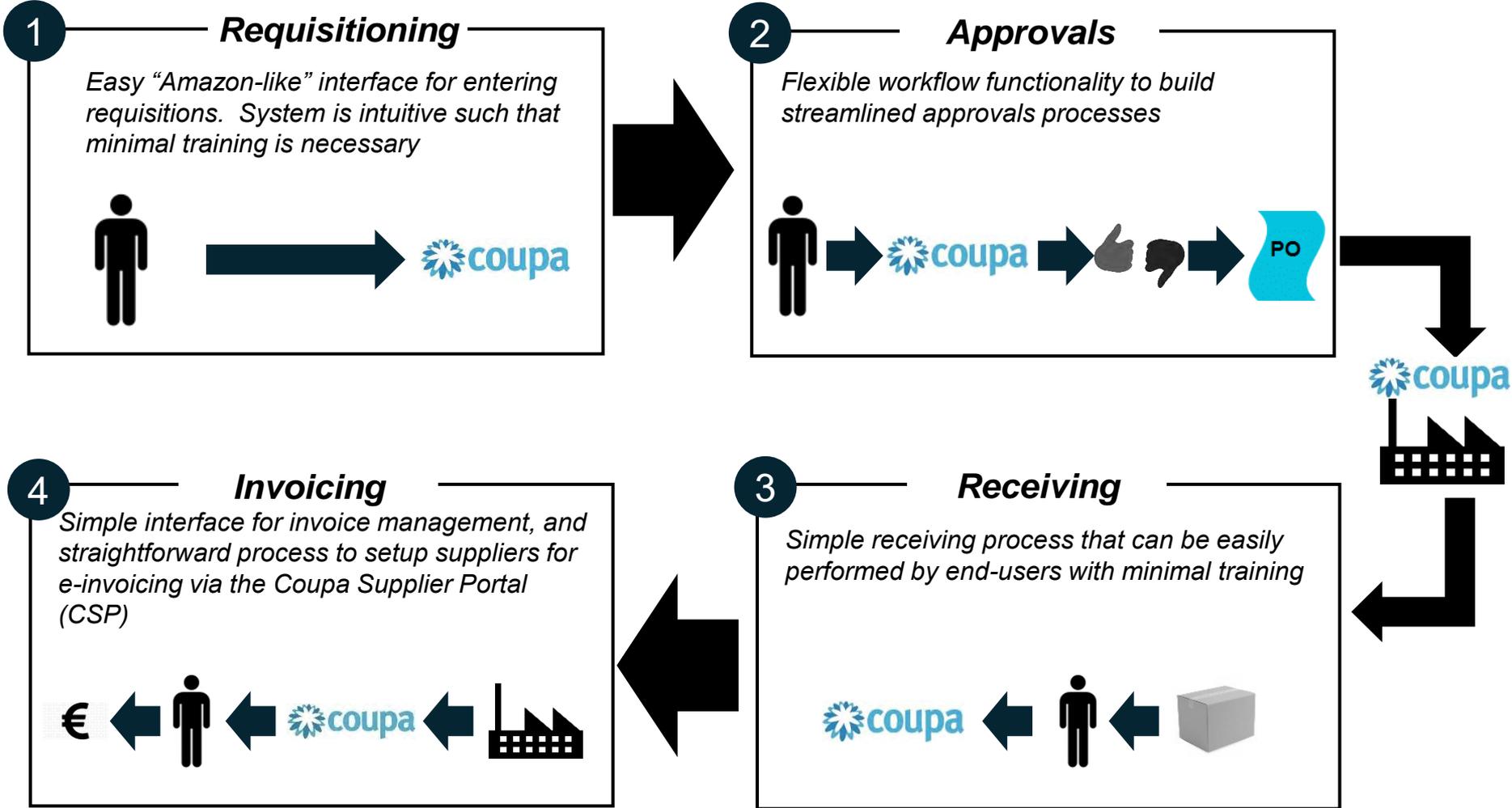


Coupa End User Training 【Quick Start Manual】

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There are a few different ways invoices will come into Coupa:

- cXML, Coupa Supplier Portal or Supplier Actionable Notifications: Suppliers are able to flip PO into an invoice and come back into Coupa. Invoices do not require manual intervention by AP or anyone at MHI-EMEA if the invoice amount matches PO amount and Goods Receipt (to be explained)
- Emailed to Coupa Inbox: AP enters invoice details manually into Coupa or matches line items to a PO in Coupa.
- Manually enter paper invoice: AP or user enters invoice details manually into Coupa.

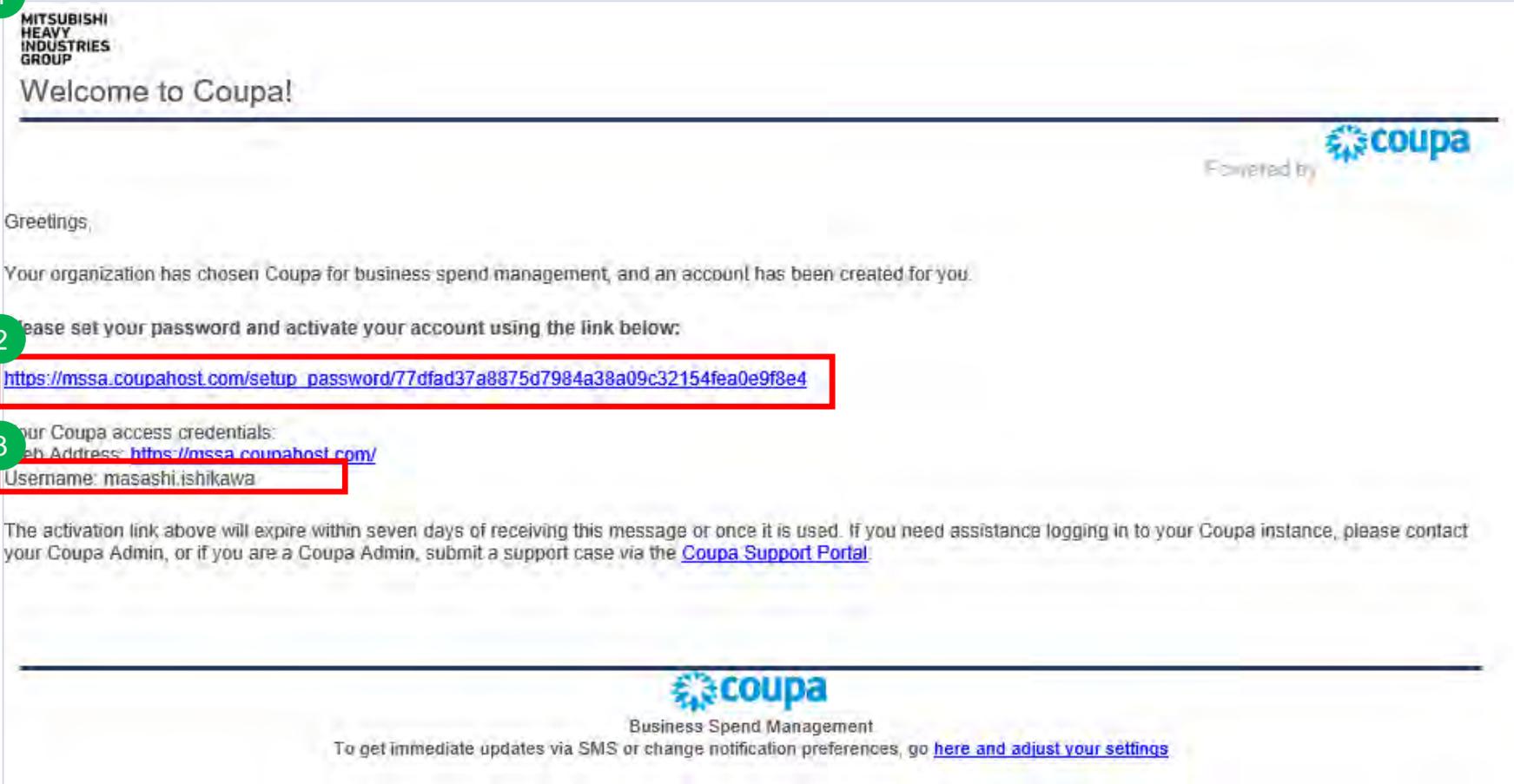
Processed in Coupa with PO	Processed in Coupa w/o PO	Processed outside of Coupa i.e. SAP/Concur/Other
<p>All external, negotiable spend generating supplier invoices. For example (non-exhaustive):</p> <ul style="list-style-type: none"> ▪ Office Supplies & Equipment ▪ IT Hardware/Software ▪ IT Consulting & Staffing ▪ Telecommunications Services & Equipment ▪ HR - Relocation, Trainings, Recruitment & Development ▪ Facilities Services & Supplies ▪ Marketing and Promotional Products ▪ Consulting Services ▪ Advertising and Communication Services & Fees ▪ Audit ▪ Events ▪ General MRO (non-inventoried items & select affiliates) <hr/> <ul style="list-style-type: none"> ▪ Temporary Staffing (potential to be included at a later stage) 	<p>All non-PO invoices with suppliers who are loaded into Coupa for PO purchases</p>	<ul style="list-style-type: none"> ▪ Travel & Employee Expenses ▪ Inventoried Items ▪ Direct Categories, including <ul style="list-style-type: none"> - Plant Equipment - Contract labor working on plant floor - Software purchases unique to plant machine operation/maintenance ▪ Purchases and contract labor tied to sales orders and/or projects ▪ Emergency repair services ▪ Intercompany Spend ▪ Categories where purchasing card is used ▪ Government Payments (taxes, permits, etc.) ▪ Utilities (Gas & Electricity) ▪ Direct Debit

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Initial login

1. You will receive an email from Coupa about setting your password.
2. Click the link to go to password reset screen.
3. Your Username is in the email.

1



MITSUBISHI
HEAVY
INDUSTRIES
GROUP

Welcome to Coupa!

Powered by 

Greetings,

Your organization has chosen Coupa for business spend management, and an account has been created for you.

Please set your password and activate your account using the link below:

https://mssa.coupahost.com/setup_password/77dfad37a8875d7984a38a09c32154fea0e9f8e4

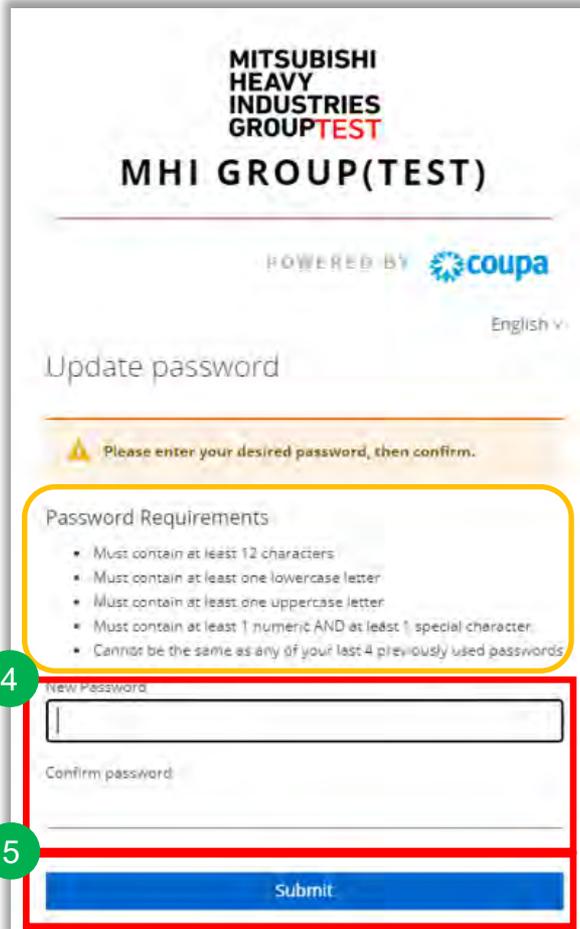
Your Coupa access credentials:
Web Address: <https://mssa.coupahost.com/>
Username: masashi.ishikawa

The activation link above will expire within seven days of receiving this message or once it is used. If you need assistance logging in to your Coupa instance, please contact your Coupa Admin, or if you are a Coupa Admin, submit a support case via the [Coupa Support Portal](#).


Business Spend Management
To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

Initial login (Cont.)

4. Enter the password
5. Click the **Submit** button
6. Logged into Coupa successfully.



MITSUBISHI
HEAVY
INDUSTRIES
GROUP TEST

MHI GROUP(TEST)

POWERED BY 

English v

Update password

 Please enter your desired password, then confirm.

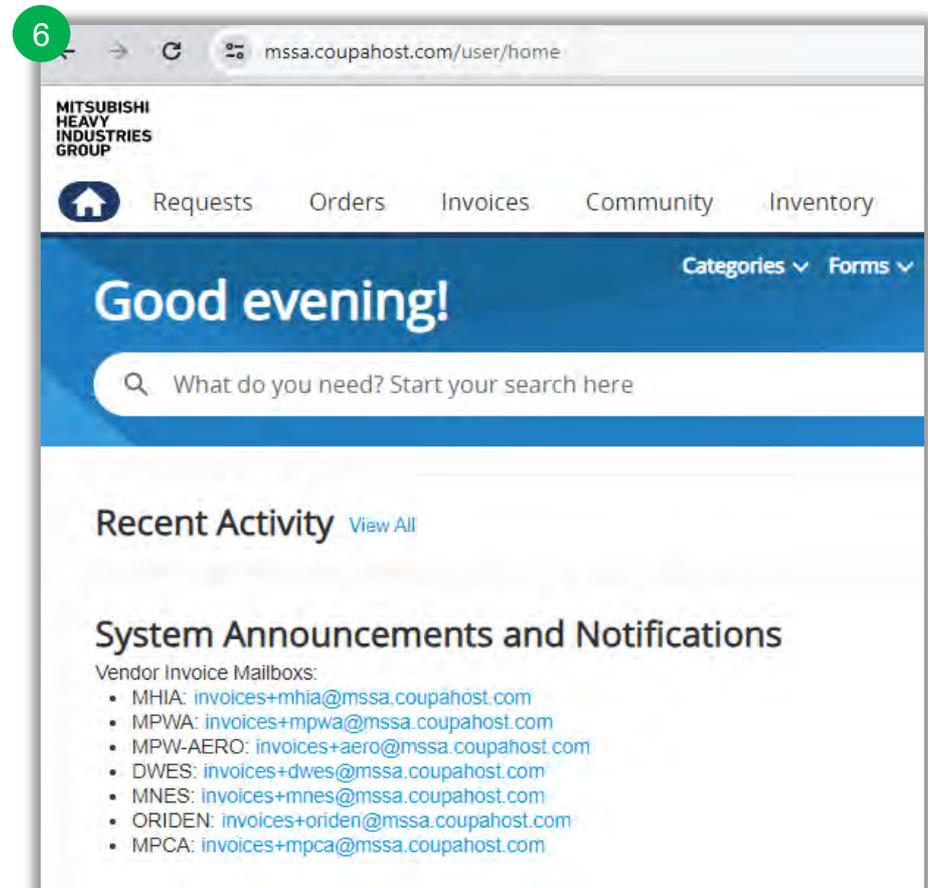
Password Requirements

- Must contain at least 12 characters
- Must contain at least one lowercase letter
- Must contain at least one uppercase letter
- Must contain at least 1 numeric AND at least 1 special character.
- Cannot be the same as any of your last 4 previously used passwords

New Password

Confirm password

Submit



6

mssa.coupahost.com/user/home

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GROUP

Home Requests Orders Invoices Community Inventory

Categories Forms

Good evening!

What do you need? Start your search here

Recent Activity [View All](#)

System Announcements and Notifications

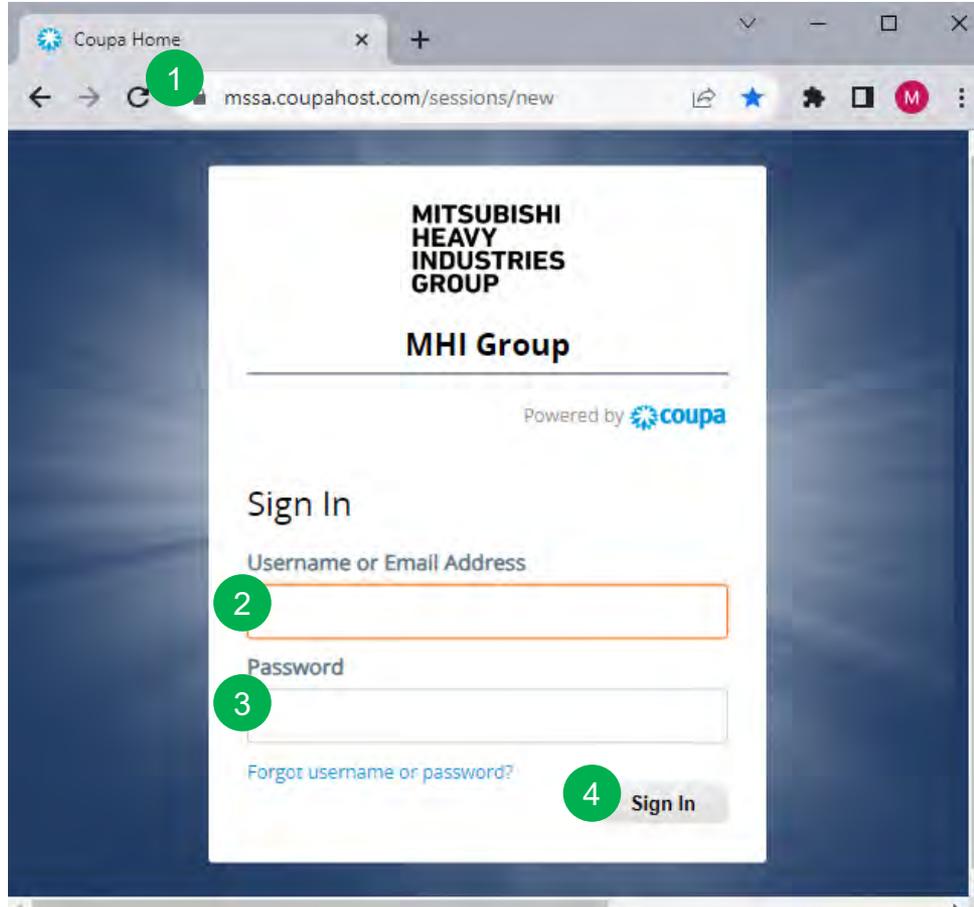
Vendor Invoice Mailboxes:

- MHIA: invoices+mhia@mssa.coupahost.com
- MPWA: invoices+mpwa@mssa.coupahost.com
- MPW-AERO: invoices+aero@mssa.coupahost.com
- DWES: invoices+dwes@mssa.coupahost.com
- MNES: invoices+mnes@mssa.coupahost.com
- ORIDEN: invoices+oriden@mssa.coupahost.com
- MPCA: invoices+mpca@mssa.coupahost.com

How to Log into MHI Coupa (Cont.)

Log into Coupa

1. Access to <https://mssa.coupahost.com/sessions/new>
2. Fill in your username or Email address
3. Full in your password
4. Click the Sign In button

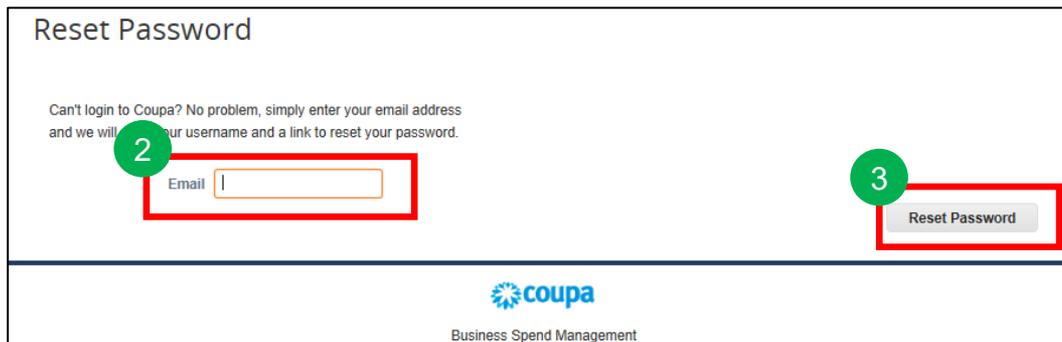
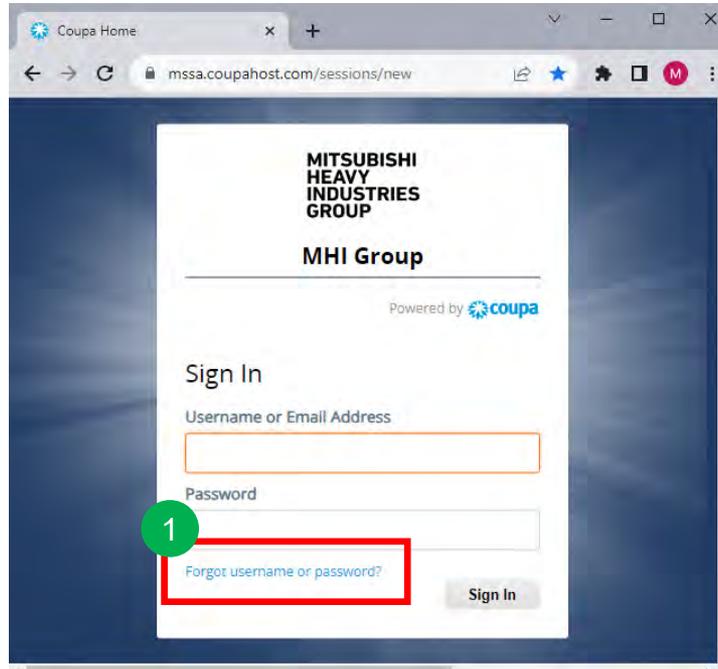


The screenshot shows a web browser window with the address bar containing the URL mssa.coupahost.com/sessions/new. The page content includes the Mitsubishi Heavy Industries Group logo, the text "MHI Group", and "Powered by coupa". Below this is a "Sign In" section with two input fields: "Username or Email Address" and "Password". A "Sign In" button is located at the bottom right of the form. A link for "Forgot username or password?" is positioned below the password field. Four green circular callouts with numbers 1 through 4 are overlaid on the image: 1 points to the address bar, 2 points to the username field, 3 points to the password field, and 4 points to the Sign In button.

How to Log into MHI Coupa (Cont.)

If forgot your password

1. Click [Forgot username or password.](#)
2. Fill in your email address
3. Click the [Reset Password](#) button.

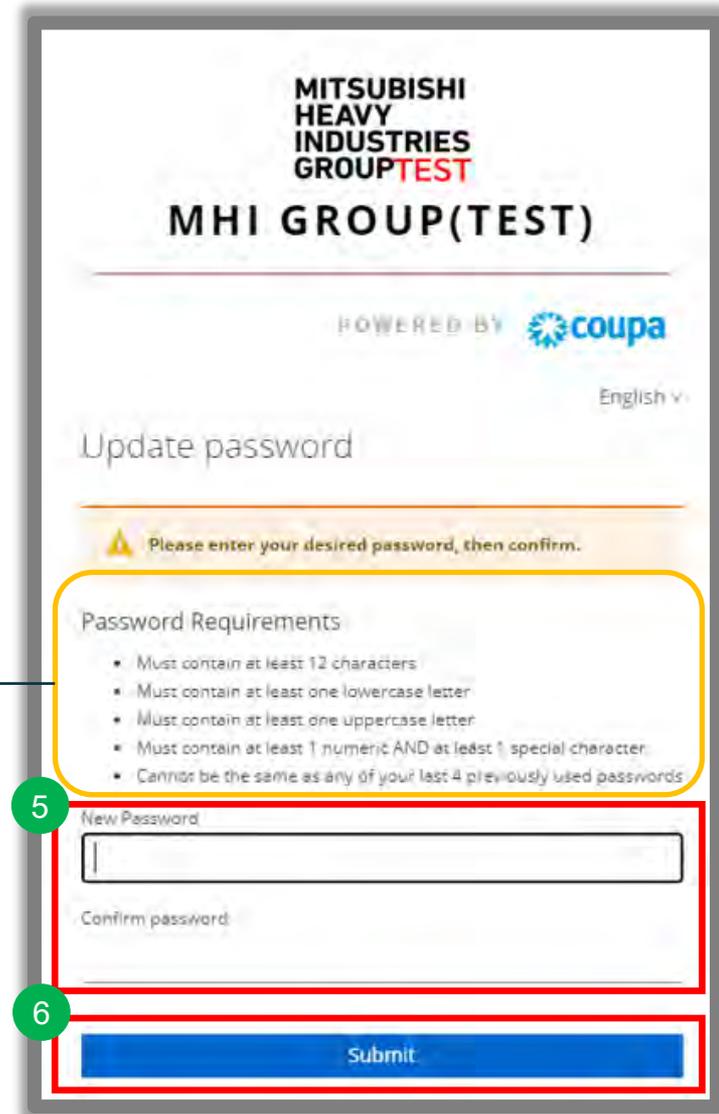


If forgot your password (Cont.)

5. Enter the password
6. Click the **Submit** button

Password Requirements

- Must contain at least 12 characters
- Must contain at least one lowercase letter
- Must contain at least one uppercase letter
- Must contain at least 1 numeric AND at least 1 special character
- Cannot be the same as any of your last 4 previously used passwords



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INDUSTRIES
GROUPTEST

MHI GROUP(TEST)

POWERED BY  coupa

English v

Update password

 Please enter your desired password, then confirm.

Password Requirements

- Must contain at least 12 characters
- Must contain at least one lowercase letter
- Must contain at least one uppercase letter
- Must contain at least 1 numeric AND at least 1 special character
- Cannot be the same as any of your last 4 previously used passwords

5 New Password

Confirm password

6 **Submit**

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Screen layout of Coupa home page

DEMO



This information is completed in order to begin a purchase request

Freeform Request

These are links to "punchouts", which are external catalogs where MHI employees can shop

Item	Status	Value (GBP)
1 Microsoft HD-3000 LifeCam, 1 Shipping costs	Ordered	27.31
2 Dell Latitude 5430 CTO Base x 2	Ordered	1,524.48
KE2303001 Cross connect between MHI EMEA DC K1-L2	Ordered	4,582.20
SQ-127061v4 VDI Storage HDD Expansion for MHI EMEA	Ordered	14,415.75
SQ-126828 Maintenance for Steelhead Product (MHI EMEA - London)	Ordered	922.00

Here, a user can view his or her recent orders, as well as the status of each order

The to-do menu will populate with a user's custom notifications, such as reminders to approve requests or Create Receipts.

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(1) Items with different commodity and requisition methods

Item / Service	Requisition Method
 <p>Office Supplies</p>	<ul style="list-style-type: none">▪ Use WB Mason punchout catalog in Coupa
 <p>Select IT Items</p>	<ul style="list-style-type: none">▪ Commodities which are requested through HuB will remain open in the HuB system. IT Technicians will enter these requests into Coupa after evaluation. Possible IT commodity options include, “Computers, Monitors & Storage Devices”, “Desktop Software” and “Enterprise Software”.
 <p>Other IT Items</p>	<ul style="list-style-type: none">▪ Use CDW punchout in Coupa
 <p>IT Services</p>	<ul style="list-style-type: none">▪ Free form requisition in Coupa
 <p>MRO</p>	<ul style="list-style-type: none">▪ MRO Punchout Catalog
 <p>Other Goods or Services</p>	<ul style="list-style-type: none">▪ Free form requisition in Coupa

(2) Four ordering methods (purchase scenarios)

Method	Description
(2).1 Punchout	This is a method of selecting and purchasing products directly from the supplier catalog.
(2).2 Free form	Free form purchases require a detailed description and specific product information.
(2).3 Search	This is a way to search for products from internal or external databases or catalogs.
(2).4 Blanket PO	A request to purchase a bulk of items needed on a regular basis. The period and quantity must be specified. When creating a blanket PO, the service option is commonly used.

(2).1 Punchout

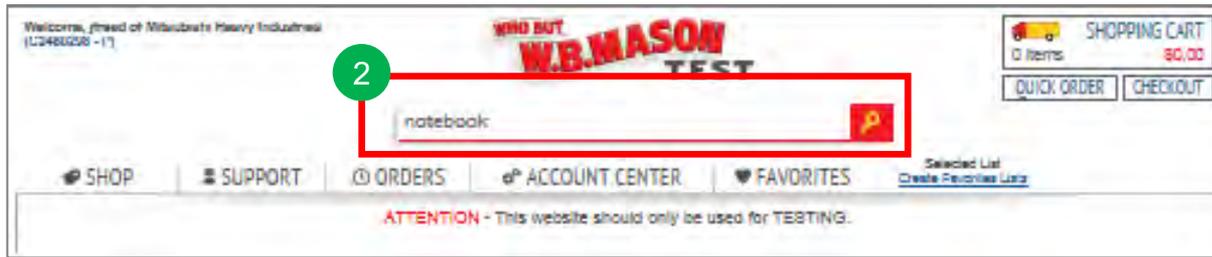
1. Please click on the supplier's punchout link to visit their website.

The screenshot shows a procurement system interface with the following elements:

- Navigation Tabs:** Home, Requests, Orders, Invoices, Community, Inventory, Sourcing, Suppliers, Items, Reports, Setup.
- Header:** "Good afternoon!" and a search bar with the text "What do you need? Start your search here". A "Write a request" button is also present.
- Additional Stores:** A grid of supplier logos including amazonbusiness, CDW, Grainger, eppendorf, MSC, Newark, Office Depot, shi, Staples, ULINE, and WEBER SUPPLY. A red box highlights the "shi" logo, with a green circle containing the number "1" next to it.
- Recent Activity:** A section with a "View All" link.
- System Announcements and Notifications:** A section titled "Vendor Invoice Mailboxes:" with a list of email addresses: MHIA, MPWA, MPWA-AERO, DWES, MNES, ORIDEN, and MPCA.
- Contracts:** A section showing "Amazon Canada Punchout" with a value of "0.00 of 0.00 USD".
- To Do:** A section showing "7 more in your inbox" and a notification: "Invoice #3712947 is rejected".

(2).1 Punchout (Cont.)

2. Enter the item you want to request in the search bar and click the magnifying glass to search.
3. Locate the item, update the quantity and click **Add to Cart**



(2).1 Punchout (Cont.)

- 4. After you added items in your cart, click “Continue to Checkout” to checkout. If you want to continue shopping, click “Continue Shopping” The items you added will be listed on your Coupa cart items

4 Cart Items

Add Line **View** All **Advanced** Search **Sort by** Line Number: 0 → 9

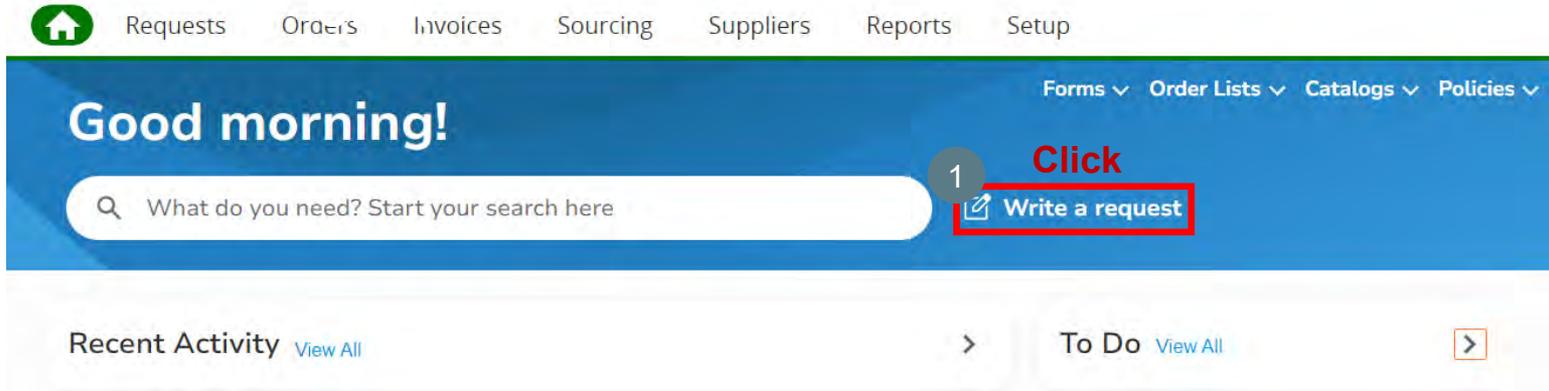
[Edit Selected](#) [Copy](#) [Delete](#)

<input type="checkbox"/>	1	Spiral Bound Notebook, Perforated, College Rule, 6 x 9 1/2, White, 150 Sheets WB Mason	22.50 USD 10 x 2.25 USD / Each	Billing MHIA MHIA -1111 - HQ GENERAL- Expense_Indirect Mat_Office Supplies XQ0-XQ01111-2724233000
		Commodity Office Supplies	Supplier Part Number MEA08900	Contract Yes
		Unconfirmed Email Address No		

Go to page Review and Edit Cart for next step

(2).2 Free form

1. Access the free form option by clicking on *Write a request* from the homepage



How to create a requisition (Cont.)



(2).2 Free form (Cont.) - Item

This image displays a screenshot of the 'Free form' for Items.

2 Write a request

a * Non Catalog Item Description

b Service Item

c * Commodity

Supplier

Unit Price: 0.00 USD Qty: 1 Unit Of Measure: Each

d * Need By Date

Supplier Part Number

Manufacturer Name

Manufacturer Part Number

Transmission Method: Supplier Default

Unconfirmed Email Address

Attachments: Add File | URL | Text

Write Multiple Requests

Cancel Add to Cart

2. Enter the information associated with your purchase request (description, supplier, etc.) and click the **Add to Cart** button.

*Required

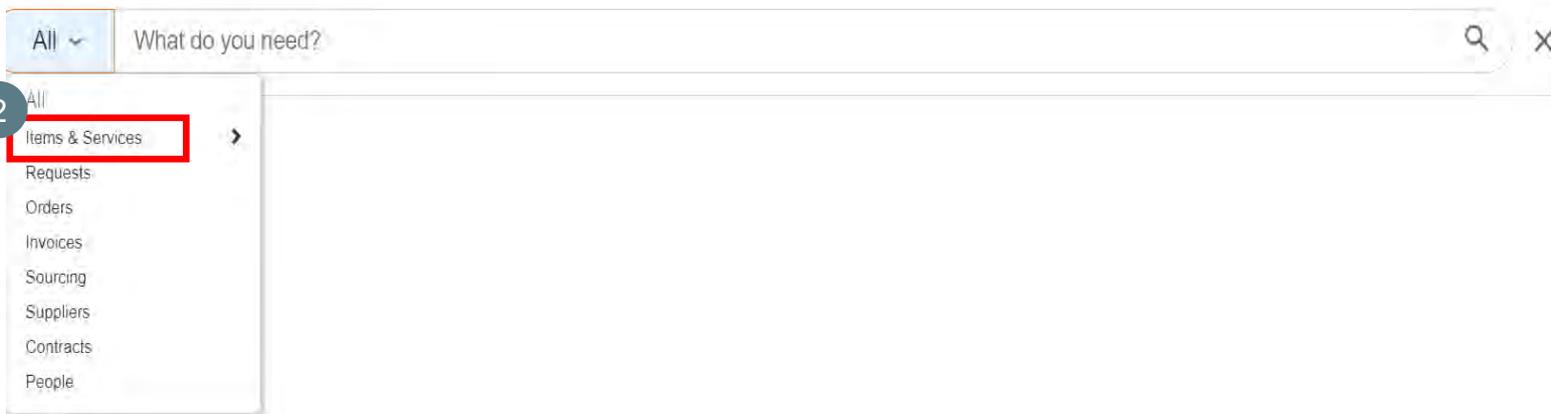
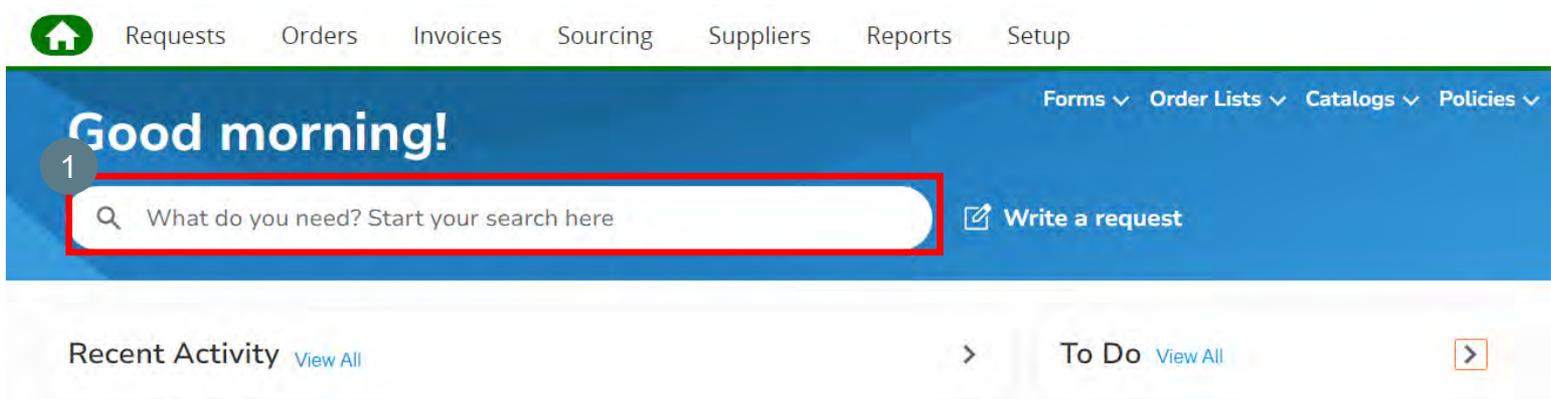
- a. Non Catalog Item Description
- b. Requisition type "Item"
- c. Commodity
- d. Need by Date

If you have attachments, Click on **File, URL or Text**.
The check box will send the text or attachment to the supplier

Go to page Review and Edit Cart for next step

(2).3 Search

1. Click the search box
2. Click the *Items & Services*



How to create a requisition (Cont.)



(2).3 Search (Cont.)

3. Enter the item you want to request in the search bar and click the magnifying glass to search
4. Set the quantity you need, then click **Add** to your cart



Items & Services (2459)

View Sort By

Related Policies
MSSA Office Supplies Purchasing Guidance

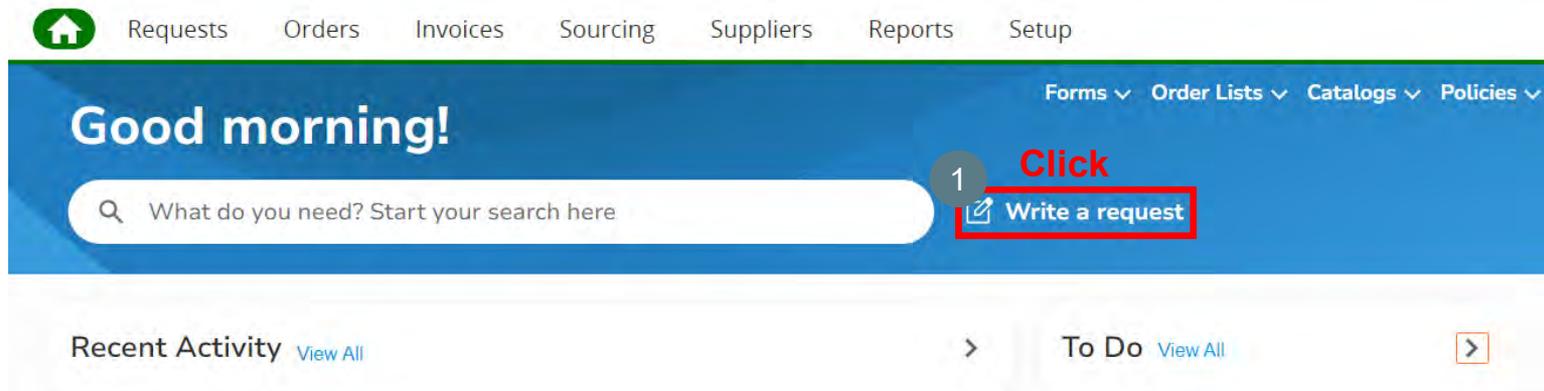
 <p>Pilot G2 Premium Retractable Gel Ink Pen, Refillable, Black Ink, .7mm, DZ Supplier Part PIL31020 from WB MASON CO INC Manufacturer Part PIL31020</p> <p>30.03 USD / Dozen</p> <p>Qty <input type="button" value="-"/> 1 <input type="button" value="+"/> <input type="button" value="Add"/></p>	 <p>BIC Round Stic Xtra Life Ballpoint Pen, Stick, Medium 1 mm, Blue Ink, Translucent Blue Barrel, Dozen Supplier Part BICGSM11BE from WB MASON CO INC Manufacturer Part BICGSM11BE</p> <p>1.59 USD / Dozen</p> <p>Qty <input type="button" value="-"/> 1 <input type="button" value="+"/> <input type="button" value="Add"/></p>
 <p>BIC Round Stic Xtra Life Ballpoint Pen, Stick, Medium 1 mm, Black Ink, Smoke Barrel, Dozen Supplier Part BICGSM11BK from WB MASON CO INC Manufacturer Part BICGSM11BK</p> <p>2.99 USD / Dozen</p> <p>Qty <input type="button" value="-"/> 1 <input type="button" value="+"/> <input type="button" value="Add"/></p>	 <p>Pilot FriXion Clicker Erasable Gel Ink Retractable Pen, Blue Ink, .7mm Supplier Part PIL31451 from WB MASON CO INC Manufacturer Part PIL31451</p> <p>15.49 USD / Dozen</p> <p>Qty <input type="button" value="-"/> 1 <input type="button" value="+"/> <input type="button" value="Add"/></p>

Go to page Review and Edit Cart for next step

(2).4 Blanket PO

A Blanket PO is a contract for the purchase of regularly needed goods or services for a specific period of time or within a specific amount. It is typically used to make recurring purchases from the same supplier within a certain time period (e.g., one year) or amount (part of a budget).

1. Access the free form option by clicking on [Write a request](#) from the homepage



How to create a requisition (Cont.)

(2).4 Blanket PO (Cont.)

2 Write a request

a * Non Catalog Item Description

b Service
 Item

c * Type
Service (Amt)

Supplier

d * Commodity

Unit Price
0.00 USD

Supplier Part Number

Manufacturer Name

Manufacturer Part Number

Service Start Date

e * Due Date

Resource Manager

Service Manager Email

Transmission Method
Supplier Default

Unconfirmed Email Address

Attachments
Add File URL Text

Write Multiple Requests

Cancel Add to Cart

Unit Price * Estimate price to cover cost for 1 year

*Required

2. Enter the information associated with your purchase request (description, supplier, etc.) and click the **Add to Cart** button.
- a. Non Catalog Item Description
 - b. Requisition type **Service**
 - c. For Blanket PO, make sure to set **Service (Amt)** in the type field.
 - d. Commodity
 - e. Due by Date

If you have attachments, Click on **File, URL or Text**.
The check box will send the text or attachment to the supplier

Go to page Review and Edit Cart for next step

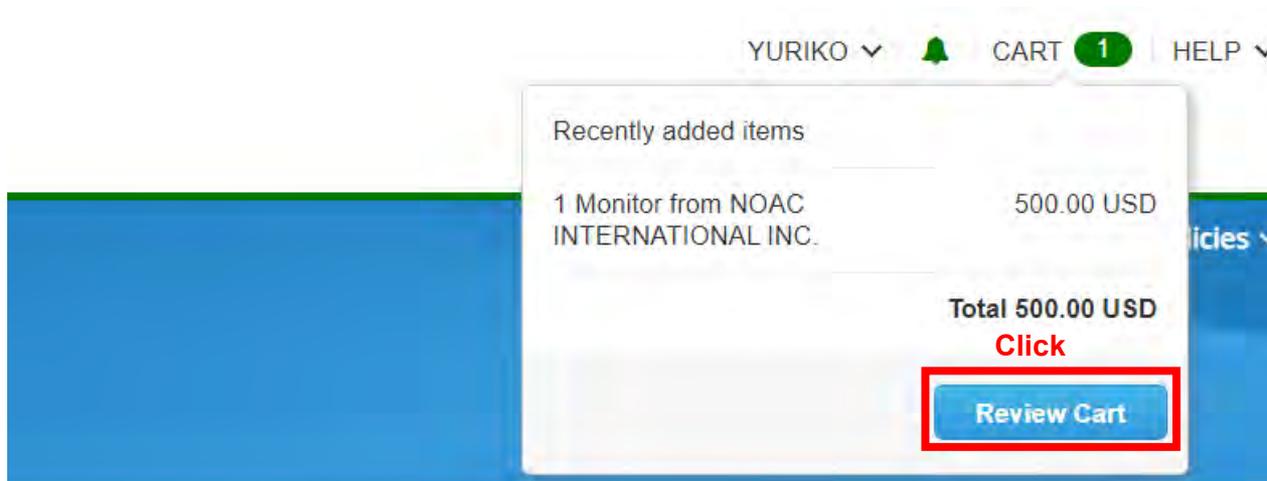
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Processing in the cart

- (1) Review and Edit Cart
- (2) Review and Edit Cart - General Info
- (3) Review and Edit Cart - Ship To
- (4) Review and Edit Cart - Cart Items
- (5) Review and Edit Cart - Copy Cart Items
- (6) Review and Edit Cart - Delete Cart Items
- (7) Review and Edit Cart - Billing
- (8) Review and Edit Cart - Split billings
- (9) Review and Edit Cart - Bulk Input for Multiple Items
- (10) Review and Edit Cart - Add Approver or Watcher
- (11) Review and Edit Cart - Save
- (12) Review and Edit Cart - Save for Later
- (13) Review and Edit Cart - Submit for Approval
- (14) Review and Edit Cart - Pending Buyer Action

(1) Review and Edit Cart

Each Requisition you created will be added to your cart. Please click [Review Cart](#) to see the contents of your cart.

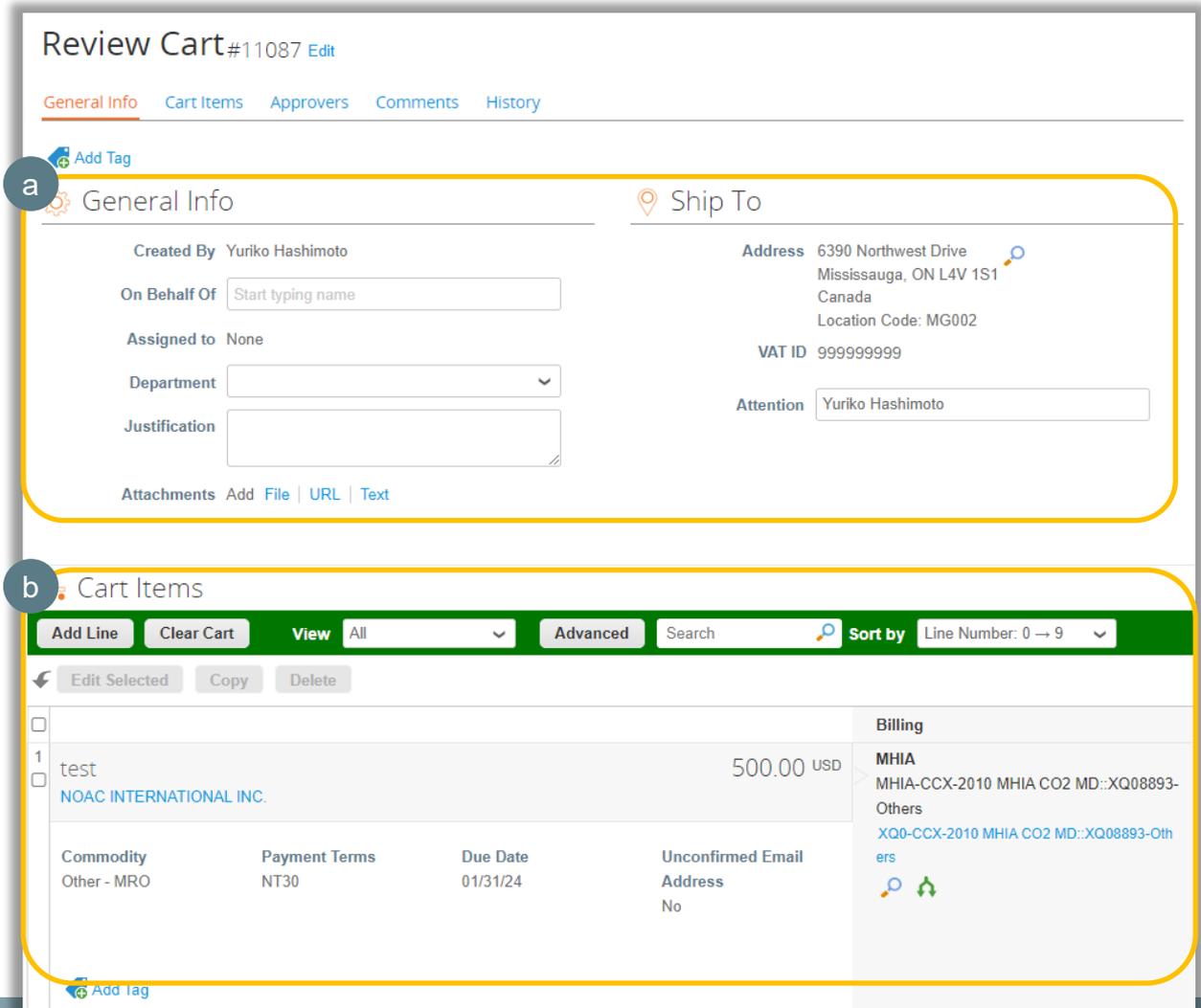


Processing in the cart (Cont.)

(1) Review and Edit Cart (Cont.)

On the **Review Cart** screen, enter the detailed information for the purchase requisition.

- (a) General Info
- (b) Cart Items



Review Cart #11087 [Edit](#)

[General Info](#) [Cart Items](#) [Approvers](#) [Comments](#) [History](#)

[Add Tag](#)

a **General Info** **Ship To**

Created By Yuriko Hashimoto **Address** 6390 Northwest Drive
Mississauga, ON L4V 1S1
Canada
Location Code: MG002

On Behalf Of **VAT ID** 999999999

Assigned to None **Attention**

Department
Justification

Attachments Add [File](#) | [URL](#) | [Text](#)

b **Cart Items**

[Add Line](#) [Clear Cart](#) **View** All [Advanced](#) **Sort by** Line Number: 0 → 9

[Edit Selected](#) [Copy](#) [Delete](#)

					Billing
<input type="checkbox"/>	1	test	500.00	USD	MHIA
<input type="checkbox"/>		NOAC INTERNATIONAL INC.			MHIA-CCX-2010 MHIA CO2 MD::XQ08893- Others XQ0-CCX-2010 MHIA CO2 MD::XQ08893-Others
		Commodity	Payment Terms	Due Date	Unconfirmed Email Address
		Other - MRO	NT30	01/31/24	No

[Add Tag](#)

(2) Review and Edit Cart - **General Info**

General Info: Include shared details for all items, such as on behalf, and the purchase reason.

1. On Behalf Of:

Using the [On Behalf Of](#) function is optional.

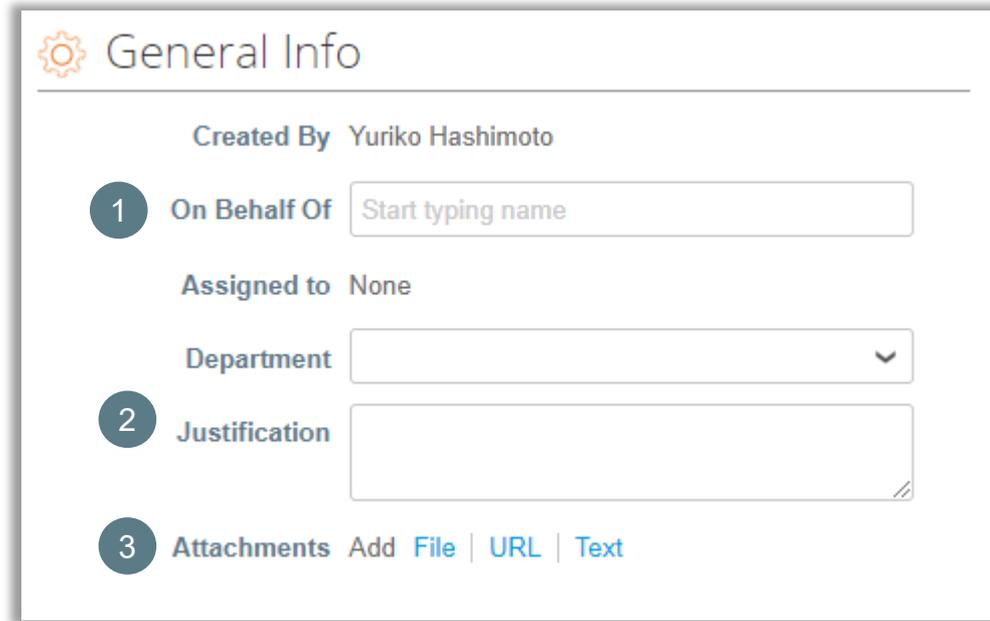
(The On Behalf Of field user drives the Ship To Address, Billing information and Approval chain. Also, Users can only choose people from their affiliate who have an active user profile in Coupa.)

2. Justification:

Provide the reason for the request. If you have obtained pre-approval, include those comments as well.

3. Attachments:

Attach files as needed.



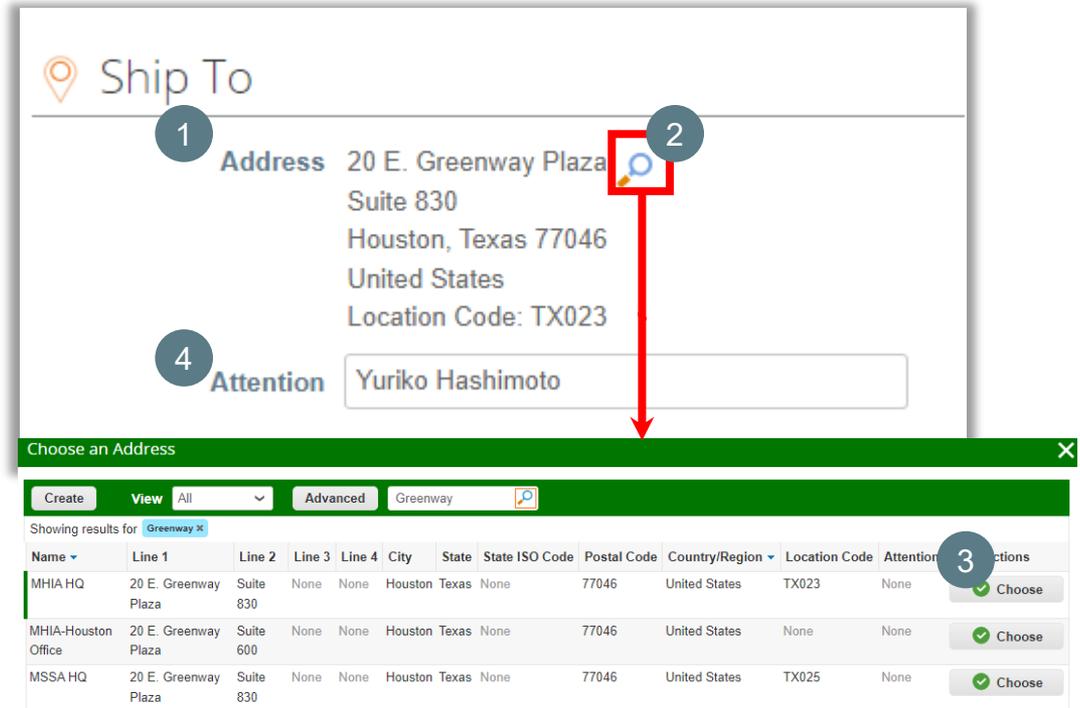
The screenshot shows a 'General Info' form with the following fields and options:

- Created By:** Yuriko Hashimoto
- 1 On Behalf Of:** A text input field with the placeholder text 'Start typing name'.
- Assigned to:** None
- Department:** A dropdown menu with a downward arrow.
- 2 Justification:** A large text area for providing details.
- 3 Attachments:** A section with the text 'Add File | URL | Text'.

(3) Review and Edit Cart - **Ship To**

General Info: Include shared details for all items, such as on behalf, and the purchase reason.

1. The Ship To **Address** is automatically displayed based on user information.
2. If delivering to a different address, click the magnifying glass icon to open the **Choose an Address** window.
3. In **Choose an Address** window, choose a pre-registered address to update the Ship To Address. If the desired address isn't pre-registered, ask the administrator to add it (local admin can do this)
4. The **Attention** field automatically displays either the address information stored in the profile or the name of the logged-in user. If shipping to a different address, you can modify it as needed. Note that leaving it blank will display the name and phone number of the logged-in user on the order form.



The screenshot shows the 'Ship To' form and the 'Choose an Address' window. The 'Ship To' form displays the current address: 20 E. Greenway Plaza, Suite 830, Houston, Texas 77046, United States, Location Code: TX023. The 'Attention' field contains 'Yuriko Hashimoto'. The 'Choose an Address' window shows a table of pre-registered addresses with a 'Choose' button for each.

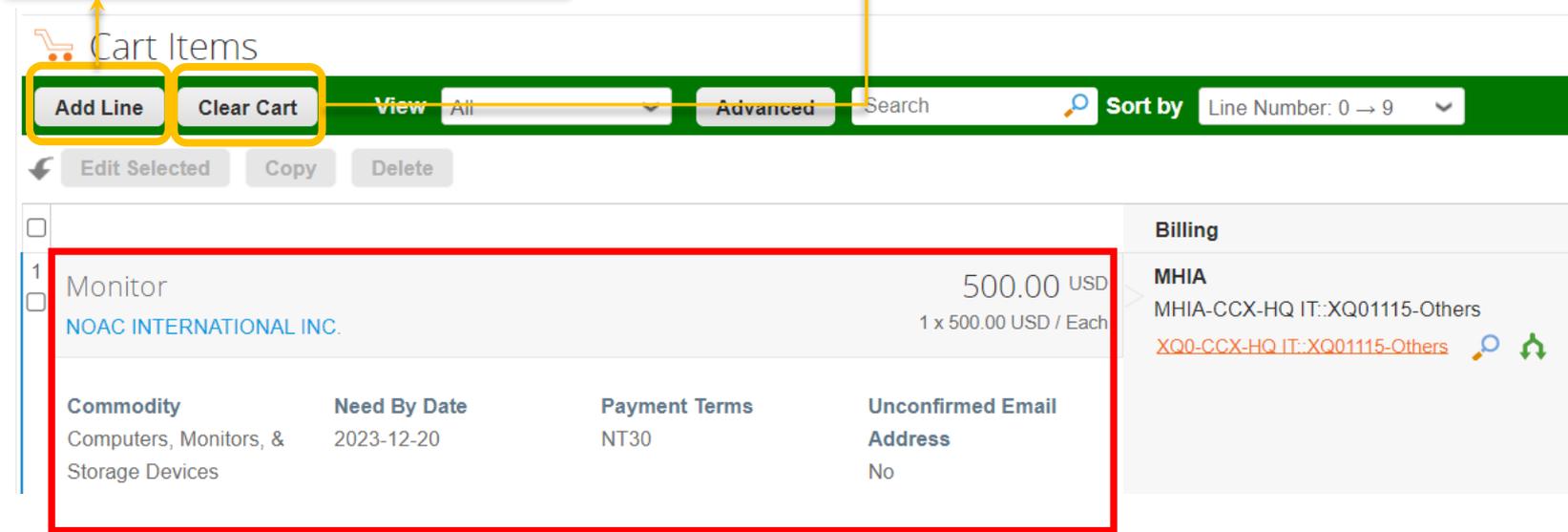
Name	Line 1	Line 2	Line 3	Line 4	City	State	State ISO Code	Postal Code	Country/Region	Location Code	Attention	Actions
MHIA HQ	20 E. Greenway Plaza	Suite 830	None	None	Houston Texas	None	77046	United States	TX023	None	None	Choose
MHIA-Houston Office	20 E. Greenway Plaza	Suite 600	None	None	Houston Texas	None	77046	United States	None	None	None	Choose
MSSA HQ	20 E. Greenway Plaza	Suite 830	None	None	Houston Texas	None	77046	United States	TX025	None	None	Choose

(4) Review and Edit Cart - **Cart Items**

In the items (details), input detailed information for each item. This includes supplier, price, account information, and so on. If purchasing multiple items, please ensure that the input values are correct for each item.

By clicking **Add Line** you can add an Item line. This works the same in freeform as well.

You can click **Clear Cart** and clear all the cart items.



Cart Items

Add Line **Clear Cart** View All **Advanced** Search **Sort by** Line Number: 0 → 9

Edit Selected Copy Delete

Commodity	Need By Date	Payment Terms	Unconfirmed Email Address
Computers, Monitors, & Storage Devices	2023-12-20	NT30	No

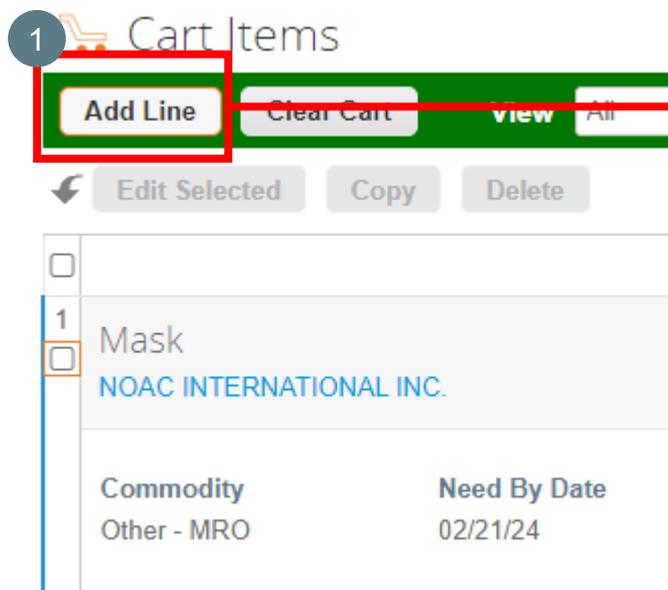
Billing

MHIA
MHIA-CCX-HQ IT::XQ01115-Others
[XQ0-CCX-HQ IT::XQ01115-Others](#)

Please check that the Item info is correct.

(4) Review and Edit Cart - **Cart Items (Cont.)** – **Add Line**

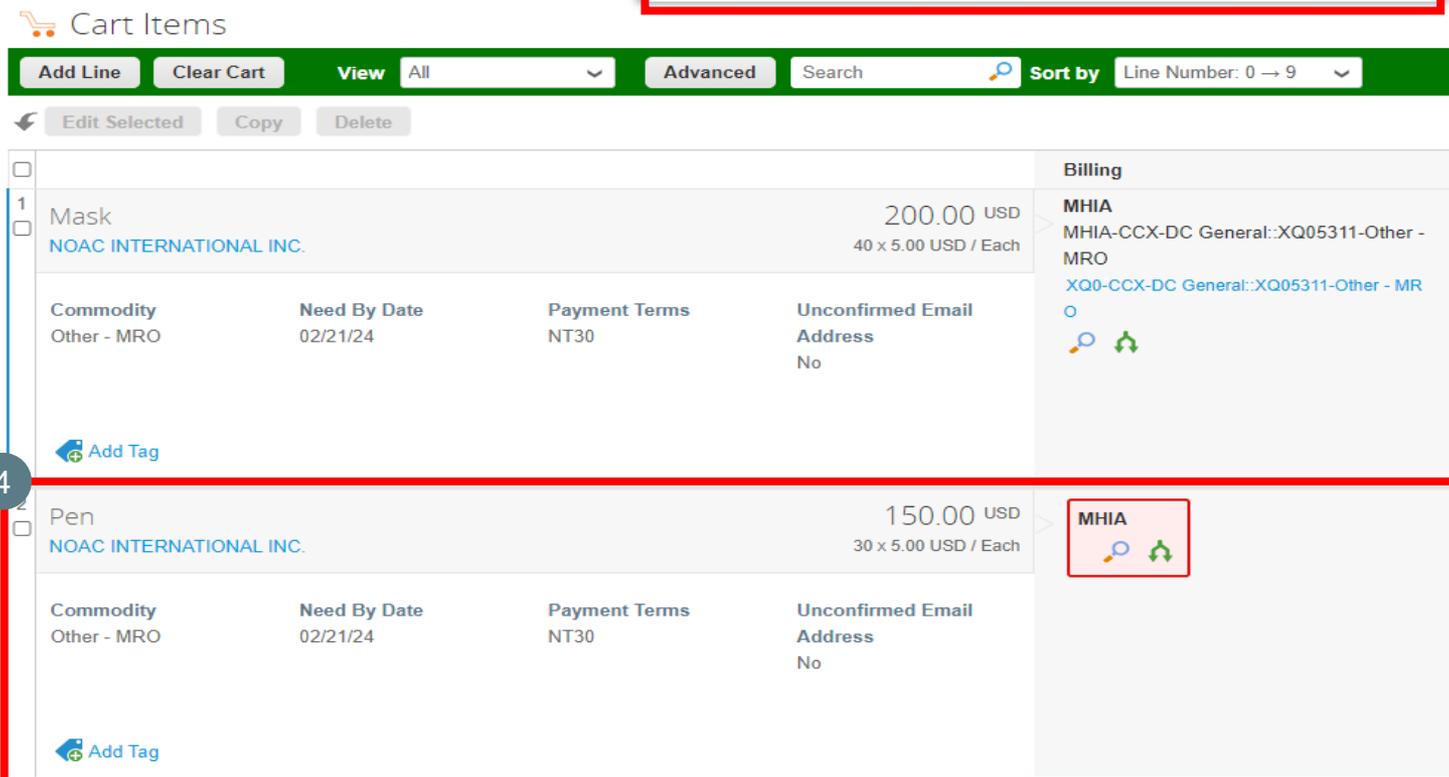
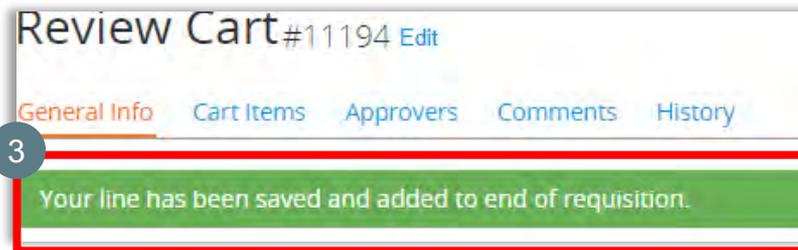
1. If you want to add an item to the same requisition, please click the **Add Line**.
2. Fill in the item information on the form and click the **Save** button.



A screenshot of the 'Add Line' form. The form is titled 'Cart Items' and has a green header bar with buttons for 'Add Line', 'Clear Cart', 'View', and 'All'. Below the header, there are radio buttons for 'Service' (selected) and 'Item'. The form contains several input fields: '* Type' (Service (Amt)), '* Item', '* Supplier' (NOAC INTERNATIONAL), '* Commodity', '* Unit Price' (0.00 USD), 'Supplier Part Number', 'Payment Terms' (NTSD), 'Service Start Date', '* Due Date', 'Resource Manager' (Select), 'Service Manager Email', 'Transmission Method' (Supplier Default), 'Manufacturer Name', 'Manufacturer Part Number', 'Unconfirmed Email Address', and 'Attachments'. At the bottom right, there are 'Cancel' and 'Save' buttons. A red circle with the number '2' is positioned over the 'Save' button, which is also highlighted with a red box.

(4) Review and Edit Cart - **Cart Items (Cont.)** – **Add Line (Cont.)**

3. The message 'Your line has been saved and added to the end of the requisition' is displayed in green.
4. Also, line item 2 has been added to this requisition.



Cart Items

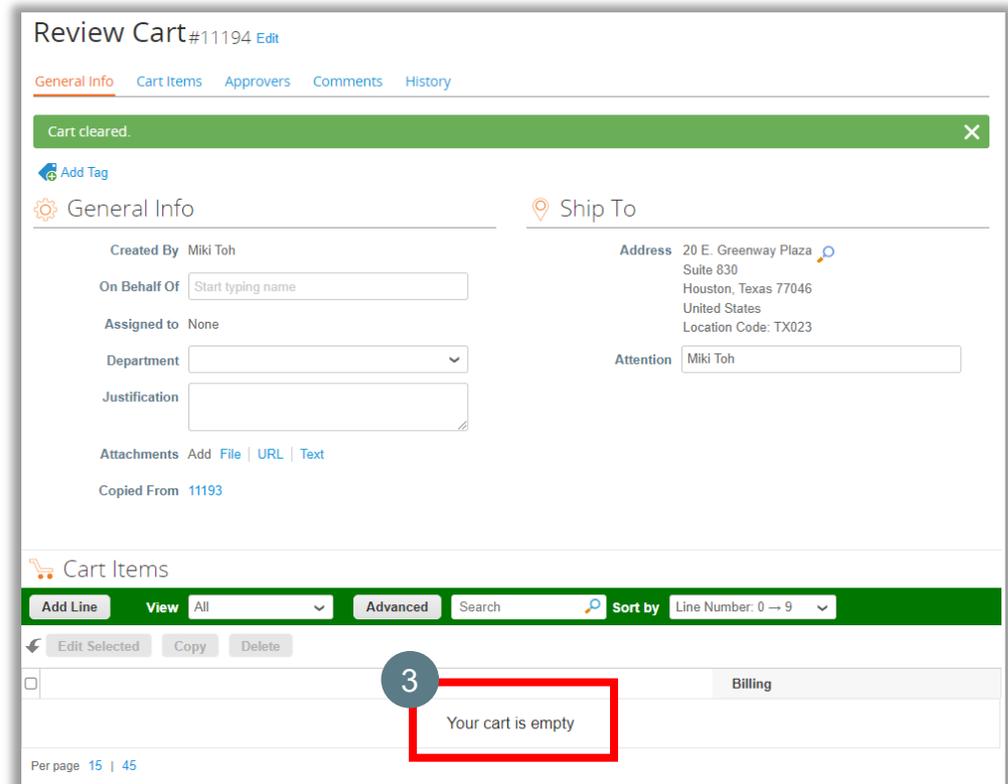
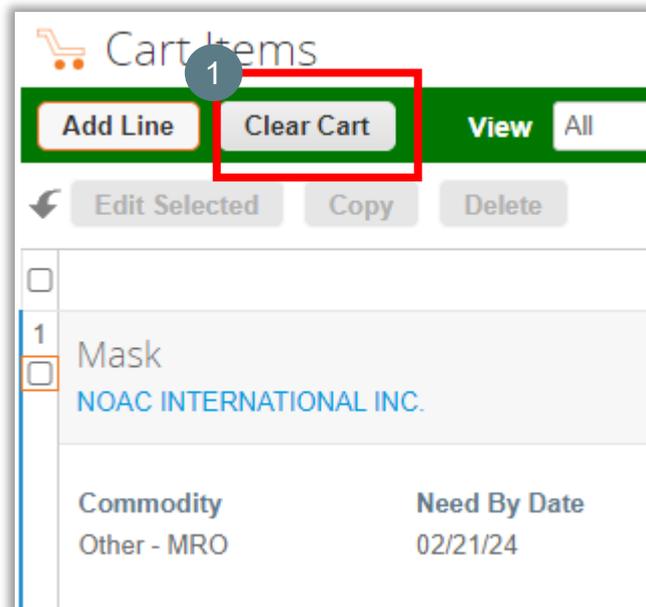
Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

Item	Description	Price	Quantity	Commodity	Need By Date	Payment Terms	Unconfirmed Email Address	Billing
1	Mask NOAC INTERNATIONAL INC.	200.00 USD	40 x 5.00 USD / Each	Other - MRO	02/21/24	NT30	No	MHIA MHIA-CCX-DC General::XQ05311-Other - MRO XQ0-CCX-DC General::XQ05311-Other - MR
2	Pen NOAC INTERNATIONAL INC.	150.00 USD	30 x 5.00 USD / Each	Other - MRO	02/21/24	NT30	No	MHIA

(4) Review and Edit Cart - **Cart Items (Cont.)** – **Clear Cart**

1. If you want to clear all items in your cart, please click on '**Clear Cart**'.
2. Then a warning message '**Are you sure?**' will appear. If you want to proceed with clearing the cart, click the '**OK**' button.
3. Afterward, your cart will be emptied from this requisition.



(5) Review and Edit Cart - Copy Cart Items

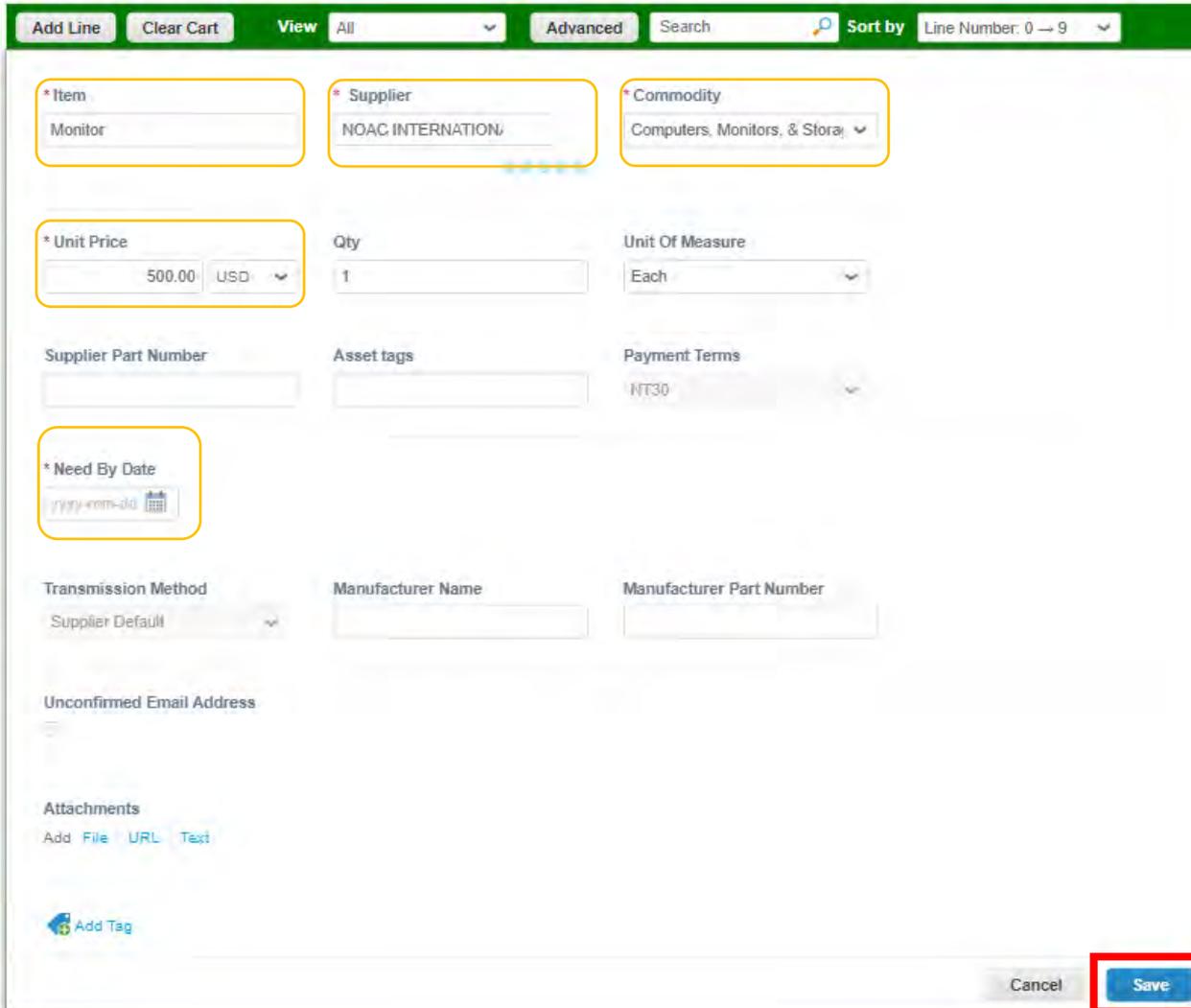
1. Check the checkboxes for the requests you want to copy
2. Click **Copy**
3. After copying the request, the message "Your line was copied successfully. Please note that some values may have changed to the default payment terms" will display at the top.

The screenshot shows the 'Cart Items' interface. At the top, there are buttons for 'Add Line', 'Clear Cart', 'View' (set to 'All'), 'Advanced', 'Search', and 'Sort by' (set to 'Line Number: 0 → 9'). Below these are buttons for 'Edit Selected', 'Copy', and 'Delete'. A red box highlights the 'Copy' button, with a circled '2' next to it. The main table lists one item: 'Monitor' by 'NOAC INTERNATIONAL INC.' with a price of '500.00 USD' and '1 x 500.00 USD / Each'. A red box highlights the checkbox for this item, with a circled '1' next to it. The table also shows columns for 'Commodity', 'Need By Date', 'Payment Terms', and 'Unconfirmed Email Address'. A 'Billing' section on the right shows 'MHIA' and 'MHIA-CCX-HQ IT::XQ01115-Others'. An 'Add Tag' button is at the bottom left.

The screenshot shows the 'Review Cart #11067' interface. At the top, there are tabs for 'General Info', 'Cart Items', 'Approvers', 'Comments', and 'History'. A red box highlights a green success message at the bottom: 'Your line was copied successfully. Please note that some values may have changed to the default payment terms.' A circled '3' is next to the message box.

(5) Review and Edit Cart - Copy Cart Items (Cont.)

4 Cart Items



4 Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

* Item: Monitor

* Supplier: NOAC INTERNATIONAL

* Commodity: Computers, Monitors, & Storage

* Unit Price: 500.00 USD

Qty: 1

Unit Of Measure: Each

Supplier Part Number: [Empty]

Asset tags: [Empty]

Payment Terms: NT30

* Need By Date: [Calendar icon]

Transmission Method: Supplier Default

Manufacturer Name: [Empty]

Manufacturer Part Number: [Empty]

Unconfirmed Email Address: [Empty]

Attachments: Add File URL Text

Add Tag

Cancel Save

4. Click **Save**

***Required**

- Item
- Supplier
- Commodity
- Unit Price
- Need by Date

(5) Review and Edit Cart - Copy Cart Items (Cont.)

5. "Your line has been saved and added to end of requisition" is displayed after Saving.

5 Your line has been saved and added to end of requisition. ✕

 Cart Items

Add Line **Clear Cart** **View** All **Advanced** Search **Sort by** Line Number: 0 → 9

Edit Selected **Copy** **Delete**

					Billing
<input type="checkbox"/>	1	Monitor NOAC INTERNATIONAL INC.	500.00 USD 1 x 500.00 USD / Each		MHIA MHIA-CCX-HQ IT.:XQ01115-Others XQ0-CCX-HQ IT.:XQ01115-Others
		Commodity Computers, Monitors, & Storage Devices	Need By Date 2023-12-20	Payment Terms NT30	Unconfirmed Email Address No
		 Add Tag			
<input type="checkbox"/>	2	Monitor NOAC INTERNATIONAL INC.	500.00 USD 1 x 500.00 USD / Each		MHIA MHIA-CCX-HQ IT.:XQ01115-Others XQ0-CCX-HQ IT.:XQ01115-Others
		Commodity Computers, Monitors, & Storage Devices	Need By Date 2023-12-22	Payment Terms NT30	Unconfirmed Email Address No
		 Add Tag			

(6) Review and Edit Cart - Delete Cart Items

1. Select the Item you want to delete and the Delete button will appear.
2. Click the **Delete** button.

The screenshot displays a shopping cart titled "Cart Items" with a green header bar. The header bar contains buttons for "Add Line", "Clear Cart", "View" (with a dropdown menu set to "All"), "Advanced", and "Selected". Below the header, there are buttons for "Edit Selected", "Copy", "Delete", and "Selected". A red box highlights the "Delete" button, labeled with a circled "2".

The cart contains two items:

- Item 1: "Mask" by NOAC INTERNATIONAL INC., priced at 100 x 2.00 USD / Each. A red box highlights the selection checkbox, labeled with a circled "1".
- Item 2: "Pen" by NOAC INTERNATIONAL INC., priced at 150.00 USD (30 x 5.00 USD / Each). A red box highlights the "MHIA" tag, labeled with a circled "3".

A confirmation dialog box is overlaid on the right side of the screen, titled "mssa-dev.coupa.com says" and "Are you sure?". It features a blue "OK" button and a grey "Cancel" button. A red box highlights the "OK" button, labeled with a circled "3".

(6) Review and Edit Cart - Delete Cart Items (Cont.)

3. Then a warning message 'Are you sure?' will appear. If you want to proceed with clearing the cart, click the 'OK' button.
4. The deleted item will then disappear from the Cart Items section.



4 Cart Items

Add Line **Clear Cart** **View** All **Advanced** Search **Sort by** Line Number: 0 → 9

Edit Selected **Copy** **Delete**

				Billing	
<input type="checkbox"/>	1	Pen NOAC INTERNATIONAL INC.	150.00 USD 30 x 5.00 USD / Each	MHIA 	
		Commodity Other - MRO	Need By Date 02/21/24	Payment Terms NT30	Unconfirmed Email Address No

Add Tag

Per page 15 | 45

(7) Review and Edit Cart - Billing

Account billing information is completed by the requester at the line level. Billing information will default based on the requester's affiliate and cost center and the commodity of the good/service.

1. If you want to change the Billing Information, click the "magnifying glass icon" located in the billing section.
2. Select billing information from the dropdown menu or type the billing information
3. Click **Choose**

Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

1	Monitor NOAC INTERNATIONAL INC.	500.00 USD 1 x 500.00 USD / Each	Billing MHIA MHIA-CCX-HQ IT::XQ01115- XQ0-CCX-HQ IT::XQ01115-Others
Commodity	Need By Date	Payment Terms	Unconfirmed Email Address
Computers, Monitors, & Storage Devices	2023-12-20	NT30	No

When you choose an account, follow MHI's standard accounting string format of Company Code (CoCd)– Cost Center (CstAcct) – OPA/WBS – GL Account (GL).

Choose an Account

Choose Chart Of Accounts MHIA

* - CoCd MHIA (XQ0)

* - CstAcct CCX-HQ IT::XQ01115

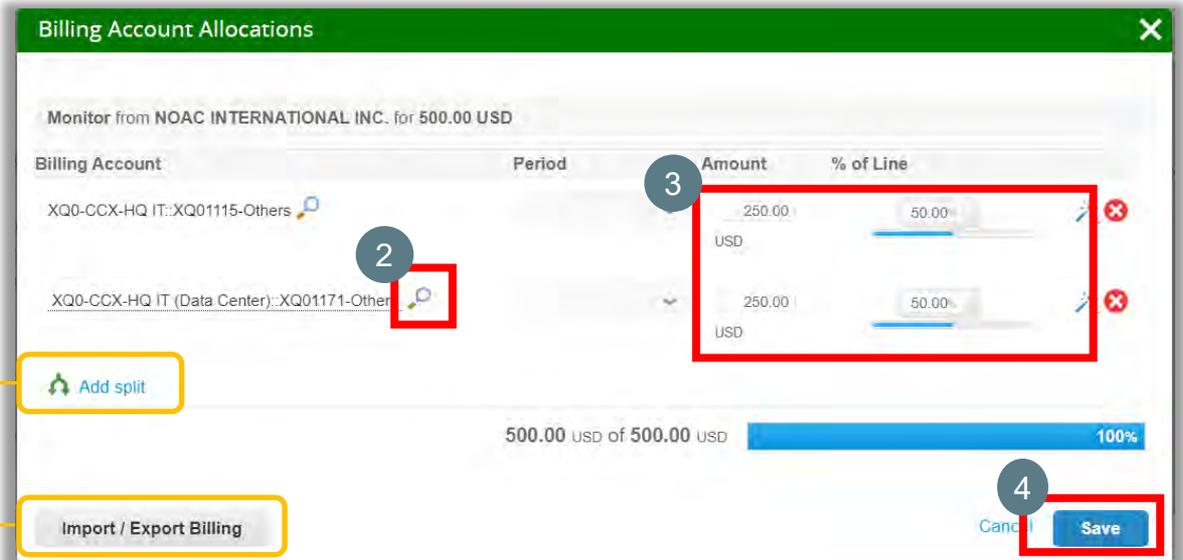
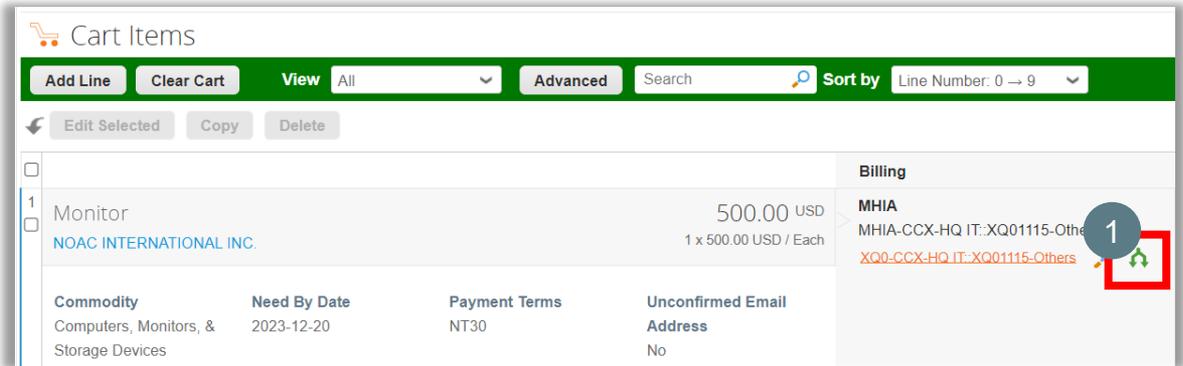
* - GL Others (Others)

Choose

(8) Review and Edit Cart - Split billings

For any Requisition line, cost can be split among different accounting strings. This will bring up the “split the billing” screen, which will allow you to add additional billing strings to split and determine the percentage and/or dollar split across the billing accounts.

1. Click the arrows to enter accounting information to split bills.
2. If the Billing Account is not set up, click the magnifying glass and set it up
3. Set up the split amount or % of Line.
4. Click Save

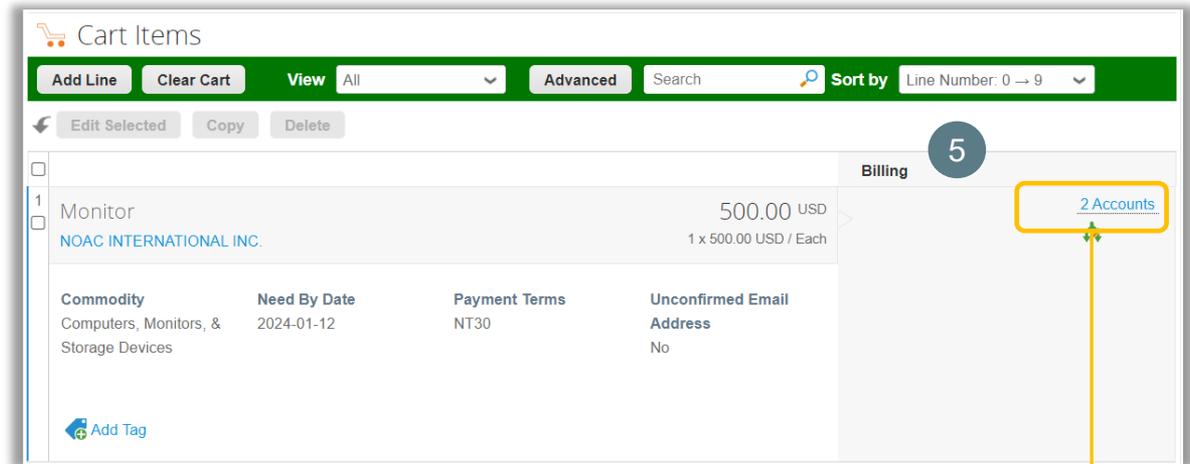


Add an additional line split if needed

Import/Export Billing if required

(8) Review and Edit Cart - Split billings (Cont.)

5. After setting the split amount, click "Save" and you will see the following screen



Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

1 Monitor 500.00 USD
NOAC INTERNATIONAL INC. 1 x 500.00 USD / Each

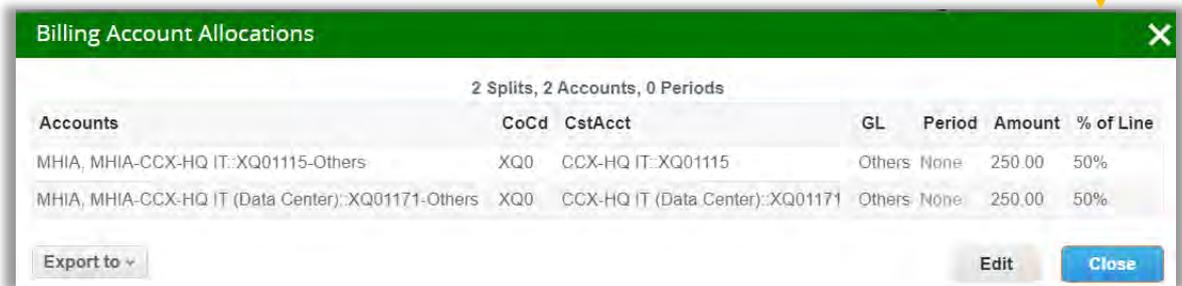
Commodity: Computers, Monitors, & Storage Devices
Need By Date: 2024-01-12
Payment Terms: NT30
Unconfirmed Email Address: No

Add Tag

Billing 5

[2 Accounts](#)

*If you click [2 Accounts](#), it will appear on the screen



Billing Account Allocations

2 Splits, 2 Accounts, 0 Periods

Accounts	CoCd	CstAcct	GL	Period	Amount	% of Line
MHIA, MHIA-CCX-HQ IT::XQ01115-Others	XQ0	CCX-HQ IT::XQ01115	Others	None	250.00	50%
MHIA, MHIA-CCX-HQ IT (Data Center)::XQ01171-Others	XQ0	CCX-HQ IT (Data Center)::XQ01171	Others	None	250.00	50%

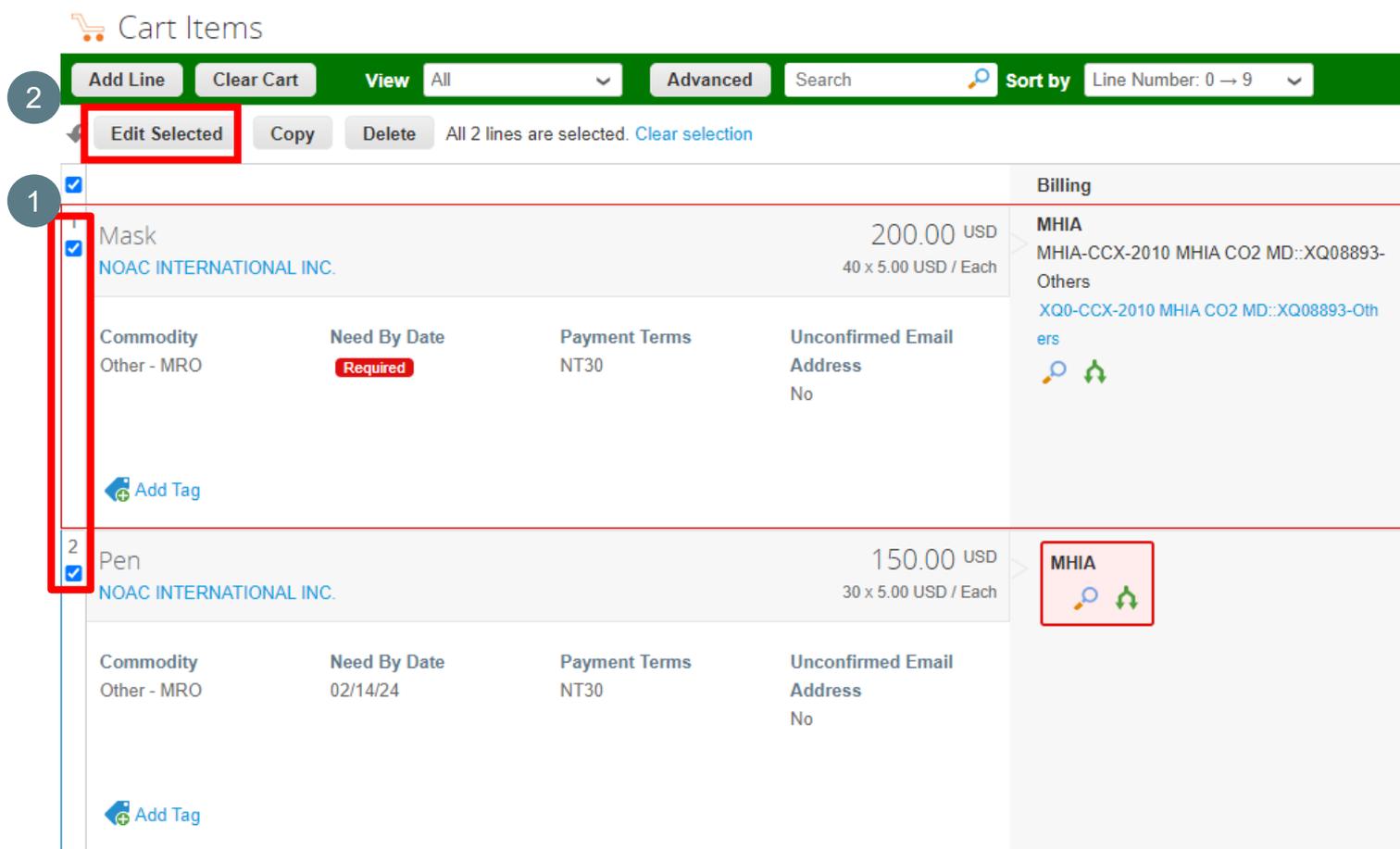
Export to Edit Close

Processing in the cart (Cont.)

(9) Review and Edit Cart - Bulk Input for Multiple Items

Split accounting strings can be applied across all requisition lines to save your time

1. Click the check box on the top left next to the “Cart Items” text to select all items.
2. Click the **Edit Selected** button.



Cart Items

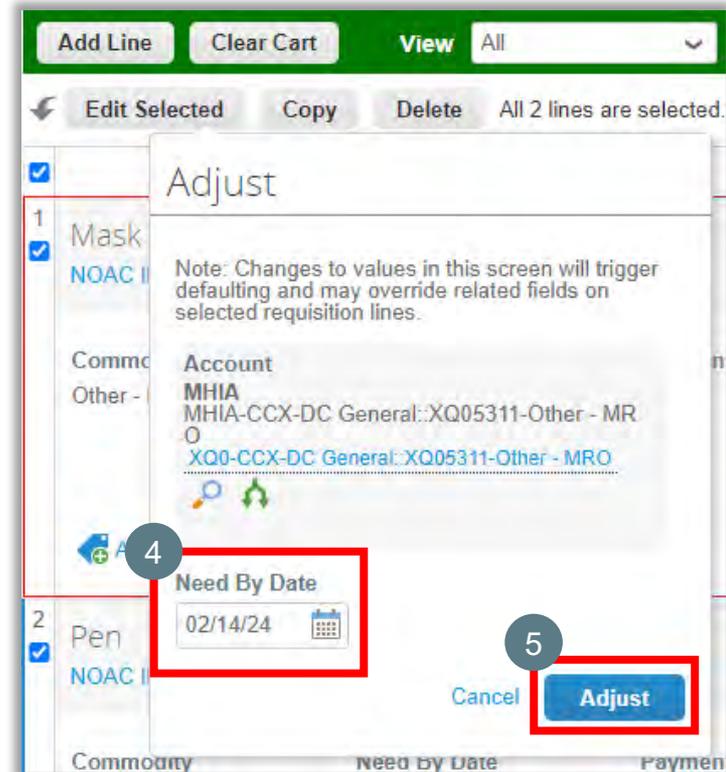
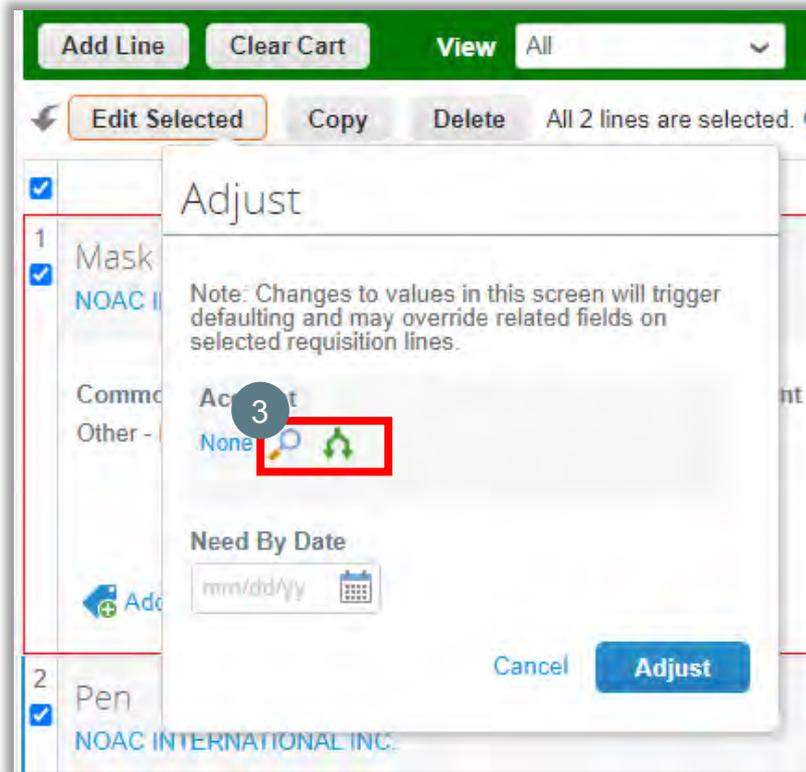
2 Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

1 Edit Selected Copy Delete All 2 lines are selected. Clear selection

Item	Description	Price	Unit	Commodity	Need By Date	Payment Terms	Unconfirmed Email Address	Billing
1	Mask NOAC INTERNATIONAL INC.	200.00 USD	40 x 5.00 USD / Each	Other - MRO	Required	NT30	No	MHIA MHIA-CCX-2010 MHIA CO2 MD::XQ08893- Others XQ0-CCX-2010 MHIA CO2 MD::XQ08893-Others
2	Pen NOAC INTERNATIONAL INC.	150.00 USD	30 x 5.00 USD / Each	Other - MRO	02/14/24	NT30	No	MHIA

(9) Review and Edit Cart - Bulk Input for Multiple Items (Cont.)

3. Click the green **Double arrow** icon to bring up the Split the Billing box, or click the **magnifying glass icon** to change the account information.
4. Select the **Need by Date**
5. Click **Adjust**.



(9) Review and Edit Cart - Bulk Input for Multiple Items (Cont.)

- When done, two lines were adjusted, and the same billing information was registered on the first and second lines, with the lead date set to the same day.

Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

Line	Description	Quantity	Unit Price	Total Price	Commodity	Need By Date	Payment Terms	Unconfirmed Email Address	Billing
1	Mask NOAC I	40	5.00 USD / Each	200.00 USD	Other - MRO	02/14/24	NT30	No	MHIA MHIA-CCX-DC General::XQ05311-Other - MRO XQ0-CCX-DC General::XQ05311-Other - MR
2	Pen NOAC INTERNATIONAL INC.	30	5.00 USD / Each	150.00 USD	Other - MRO	02/14/24	NT30	No	MHIA MHIA-CCX-DC General::XQ05311-Other - MRO XQ0-CCX-DC General::XQ05311-Other - MR

Success!
2 Lines Adjusted
Account is now XQ0-CCX-DC
General::XQ05311-Other - MRO
Req is now 11193

Add Tag

(10) Review and Edit Cart - **Add Approver or Watcher**

Before Submitting the requisition, if you need to add an *Approver* or *Watcher* for this requisition

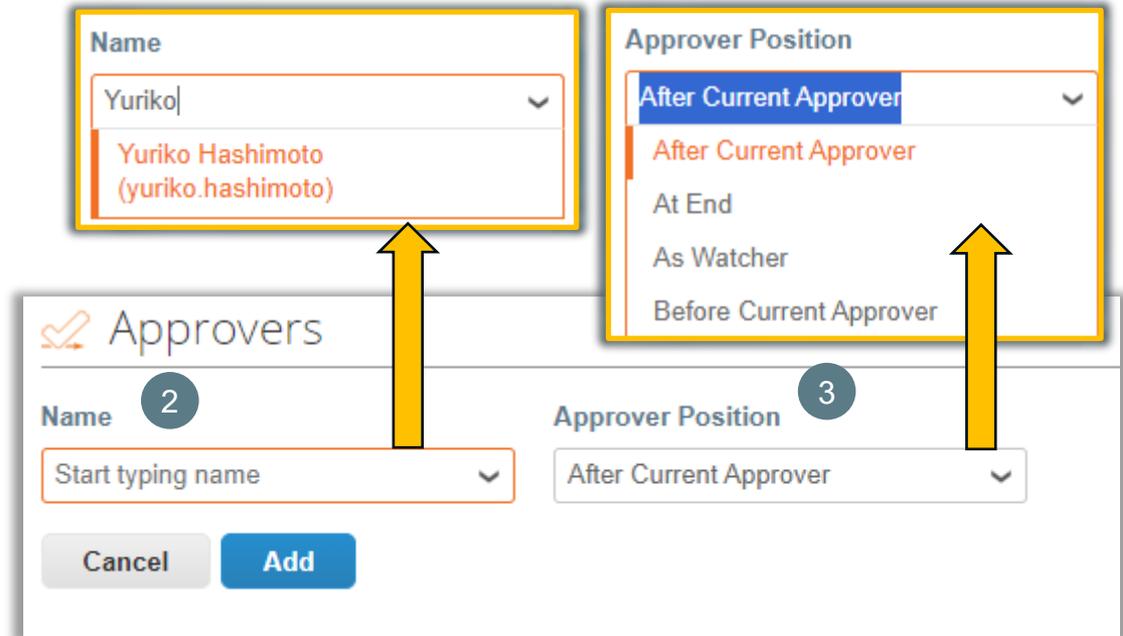
1. Click the *Add* button.



(10) Review and Edit Cart - **Add Approver or Watcher (Cont.)**

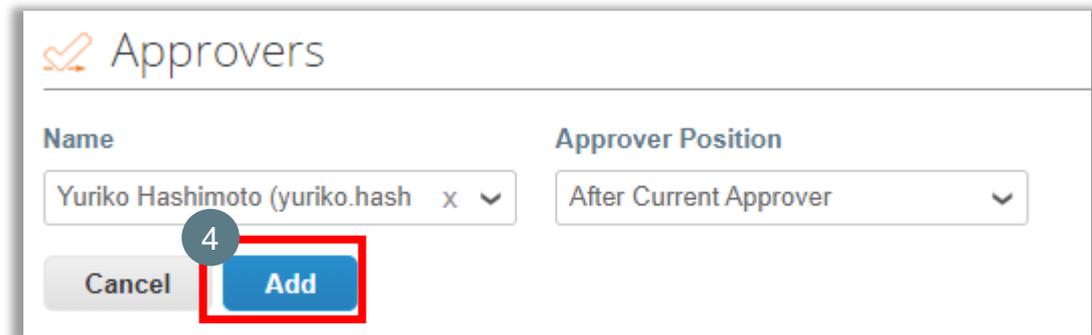
2. Please enter the name you wish to add to this approval chain, or select a watcher.

3. Then select the approver position from the drop-down list. (If you want to select a watcher, please choose **'As Watcher'**).



The screenshot shows the 'Approvers' form with two dropdown menus. The 'Name' dropdown is open, showing 'Yuriko Hashimoto (yuriko.hashimoto)' selected. The 'Approver Position' dropdown is also open, showing 'After Current Approver' selected. Yellow arrows point from the main form to the expanded dropdowns. The main form has a 'Name' field with a search icon and 'Start typing name', and an 'Approver Position' field with 'After Current Approver' selected. There are 'Cancel' and 'Add' buttons at the bottom.

4. Then click the **Add** button



The screenshot shows the 'Approvers' form with the 'Name' field containing 'Yuriko Hashimoto (yuriko.hashimoto)' and the 'Approver Position' field containing 'After Current Approver'. The 'Add' button is highlighted with a red box and a circled '4', indicating it should be clicked.

(10) Review and Edit Cart - **Add Approver or Watcher (Cont.)**

5. The approver has been added , then please Save, Save for Later or Submit for Approval for this requisition.



The screenshot displays the 'Approvers' section of a software interface. At the top left, there is a header 'Approvers' with a small icon. Below it is an 'Add' button. The main area shows a horizontal flow of approvers connected by a line. The approvers are represented by colored circles with initials and names below them: MT (Miki Toh), YH (Yuriko Hashimoto), MI (Masashi Ishikawa), and NT (noac test). The YH approver is highlighted with a red rectangular box. Below the YH name is a red circle with a white 'x' icon. To the right of the NT approver is a mouse cursor icon and the text 'Approval Complete'. At the bottom right, there are three buttons: 'Save for Later', 'Save', and 'Submit for Approval'.

(11) Review and Edit Cart - Save

Save saves your current shopping cart requisition. Cart items remain in your current cart.

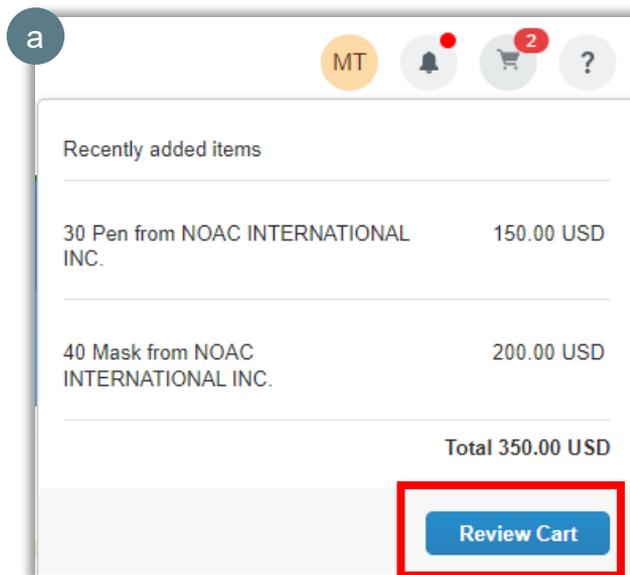
1. If you want to save the requisition, click **Save** button.



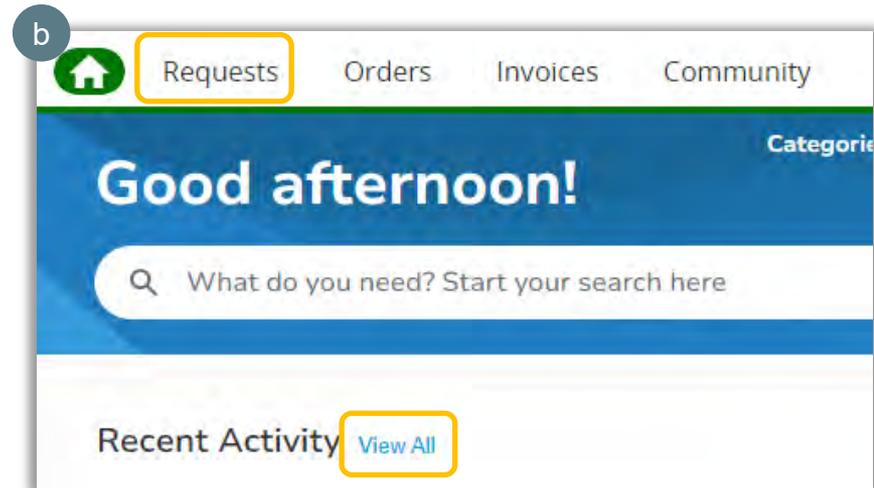
The screenshot shows a workflow titled "Approvers" with an "Add" button. The workflow consists of four steps: Miki Toh (MT), Yuriko Hashimoto (YH), Masashi Ishikawa (MI), and noac test (NT), followed by "Approval Complete". The "Save" button is highlighted with a red box and a circled "1".

(11) Review and Edit Cart - Save (Cont.)

2. If you want to edit or add items to the saved requisition, you can do so by a) or b) as shown below.



a) Click on [Review Cart](#) in the upper right corner and edit the request.

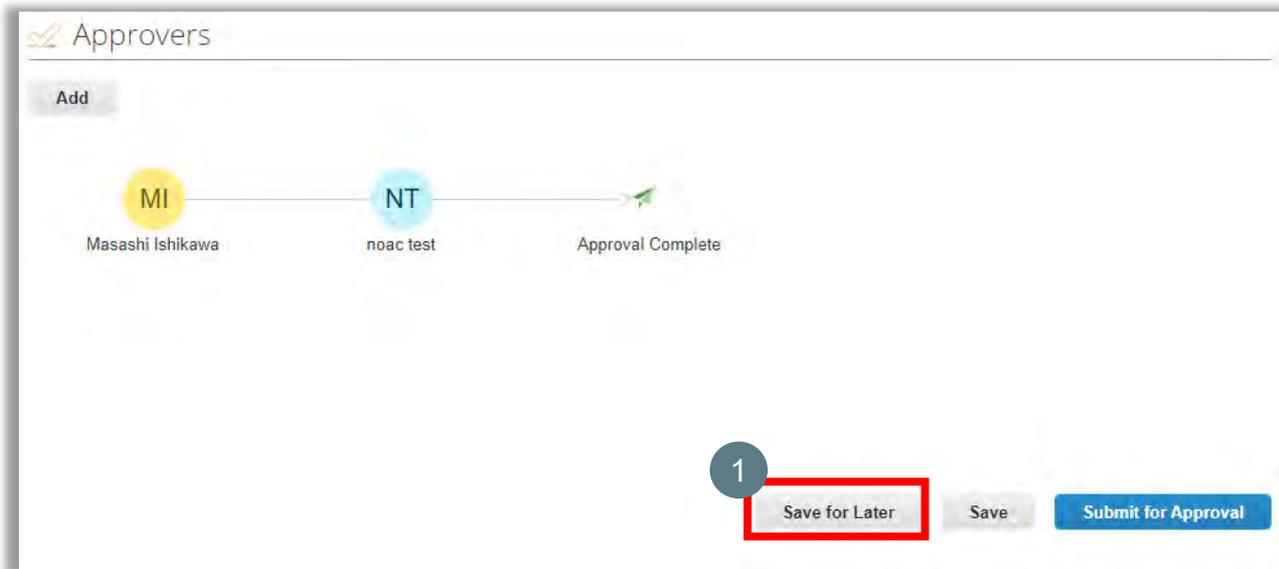


b) Click on the [Requests](#) tab and edit your requisition. If the Requests tab is not available on the homepage, click on [Recent Activity](#) -> [View All](#) and search for the Requisition list to edit.

(12) Review and Edit Cart - **Save for Later**

Save for later also saves current shopping cart requisition but it places it in draft status and opens a new requisition shopping cart that the user can work on in the meantime.

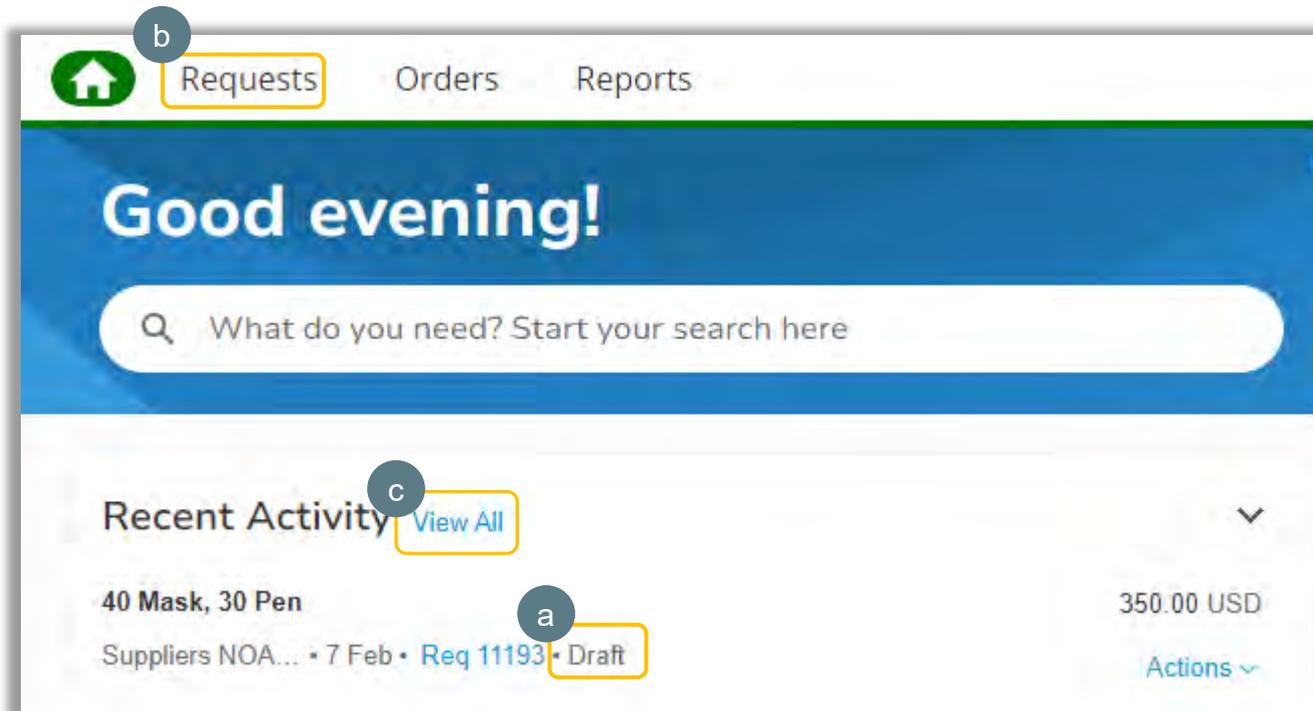
1. Click **Save for Later** button.



(12) Review and Edit Cart - **Save for Later (Cont.)**

From options a), b), and c) shown below, you can check the requisition you saved in Save for later.

- a) When you save a requisition using “Save for later” it will be saved as a draft.
- b) Click on the **Requests** tab to see the relevant requisitions from the list of requisitions.
- c) If your permissions do not allow you to see the Requests tab on your home page, you can check it from the Requisition list in View All under Recent Activity or by clicking on **View All** and then on the Requisition list.



(13) Review and Edit Cart - **Submit for Approval**

1. After all requests are entered correctly, click **Submit for Approval** to send the approval to the next approver.



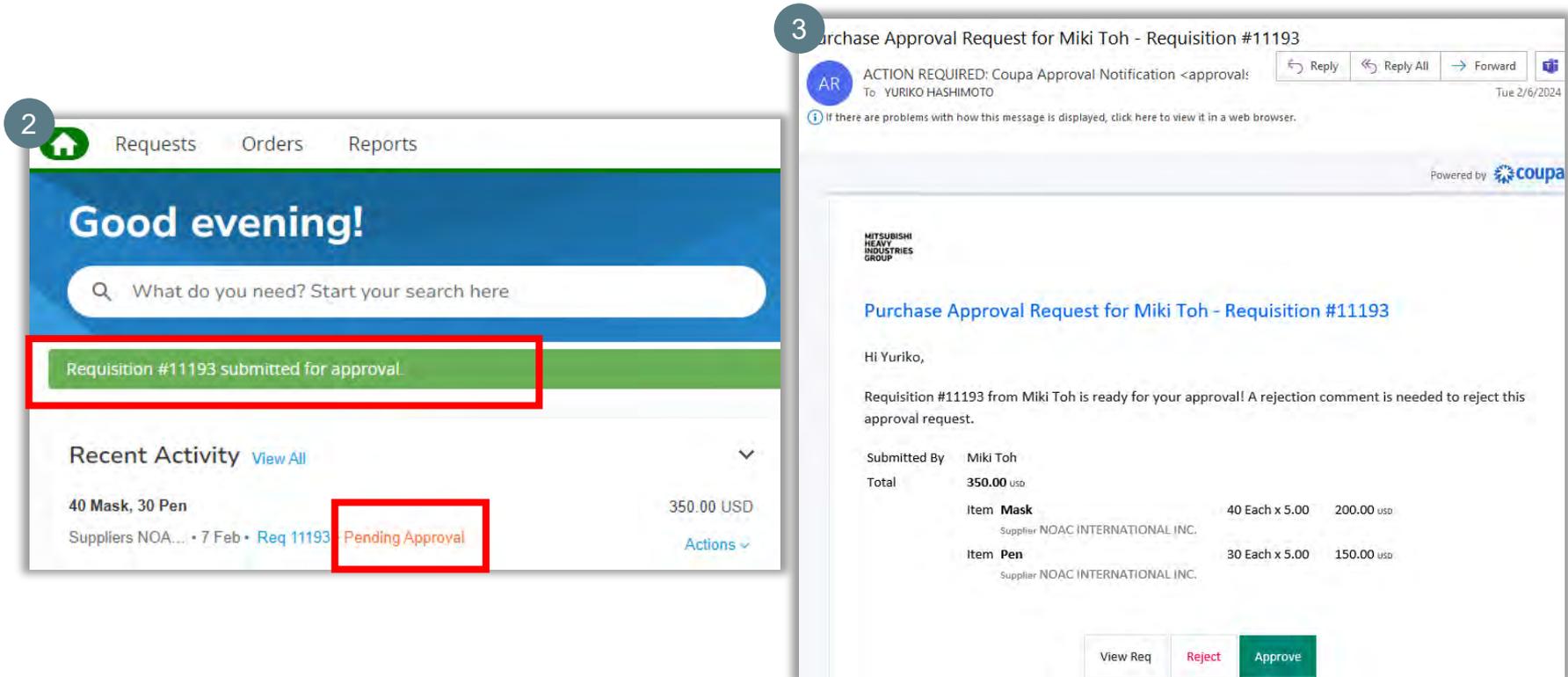
The screenshot shows a workflow titled "Approvers" with the following steps:

- MT (Miki Toh)
- YH (Yuriko Hashimoto) - marked with a red 'x' icon
- MI (Masashi Ishikawa)
- NT (noac test)
- Approval Complete

At the bottom right, there are three buttons: "Save for Later", "Save", and "Submit for Approval". The "Submit for Approval" button is highlighted with a red box and a circled "1".

(13) Review and Edit Cart - **Submit for Approval (Cont.)**

2. You will see a message in green stating 'Requisition # submitted for approval' and the status of Req 11193 will change to **Pending Approval** in your Recent Activity section.
3. Simultaneously, the next approver will receive a notification email for approval..



The image shows two screenshots illustrating the approval process. The left screenshot, labeled with a '2' in a circle, shows a user interface with a green notification bar at the top stating 'Requisition #11193 submitted for approval.' Below this, in the 'Recent Activity' section, the requisition is listed with a status of 'Pending Approval' highlighted in a red box. The right screenshot, labeled with a '3' in a circle, shows an email notification titled 'Purchase Approval Request for Miki Toh - Requisition #11193'. The email content includes a greeting to Yuriko, a request for approval, and a table of items: 40 masks and 30 pens, both from NOAC International Inc. At the bottom of the email, there are buttons for 'View Req', 'Reject', and 'Approve'.

2

Requisition #11193 submitted for approval.

Recent Activity [View All](#)

40 Mask, 30 Pen	350.00 USD
Suppliers NOA... • 7 Feb • Req 11193	Pending Approval Actions

3

Purchase Approval Request for Miki Toh - Requisition #11193

ACTION REQUIRED: Coupa Approval Notification <approval:
To: YURIKO HASHIMOTO

Tue 2/6/2024

Powered by [coupa](#)

MITSUBISHI HEAVY INDUSTRIES GROUP

Purchase Approval Request for Miki Toh - Requisition #11193

Hi Yuriko,

Requisition #11193 from Miki Toh is ready for your approval! A rejection comment is needed to reject this approval request.

Submitted By: Miki Toh

Total: 350.00 USD

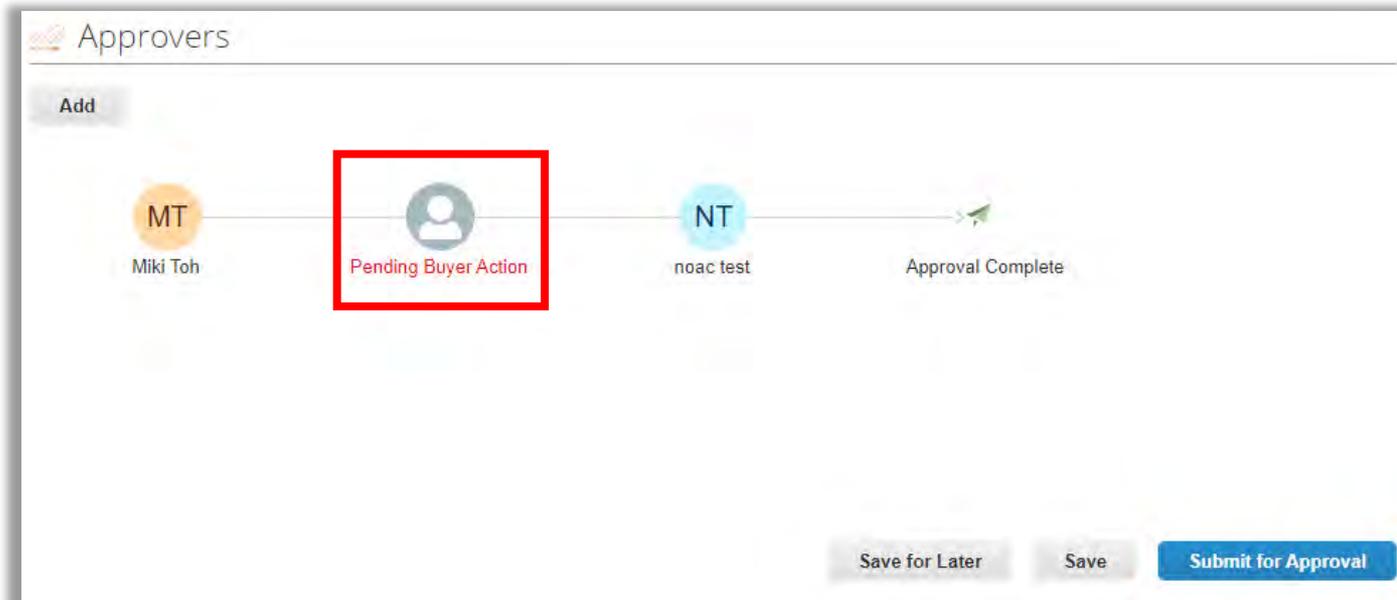
Item Mask	40 Each x 5.00	200.00 USD
Supplier NOAC INTERNATIONAL INC.		
Item Pen	30 Each x 5.00	150.00 USD
Supplier NOAC INTERNATIONAL INC.		

[View Req](#) [Reject](#) [Approve](#)

(14) Review and Edit Cart - **Pending Buyer Action**

When a requisition is missing information that is required for the purchase order, the requisition will be placed on “**Pending Buyer Action**” status. This typically occurs when:

1. A requester does not select a supplier (you can intentionally leave this blank if you want/need Procurement’s support in identifying the correct supplier)
2. A requester’s ship-to address is left blank (however this should not occur since Ship To details are entered by default)
3. A requester does not enter complete billing information

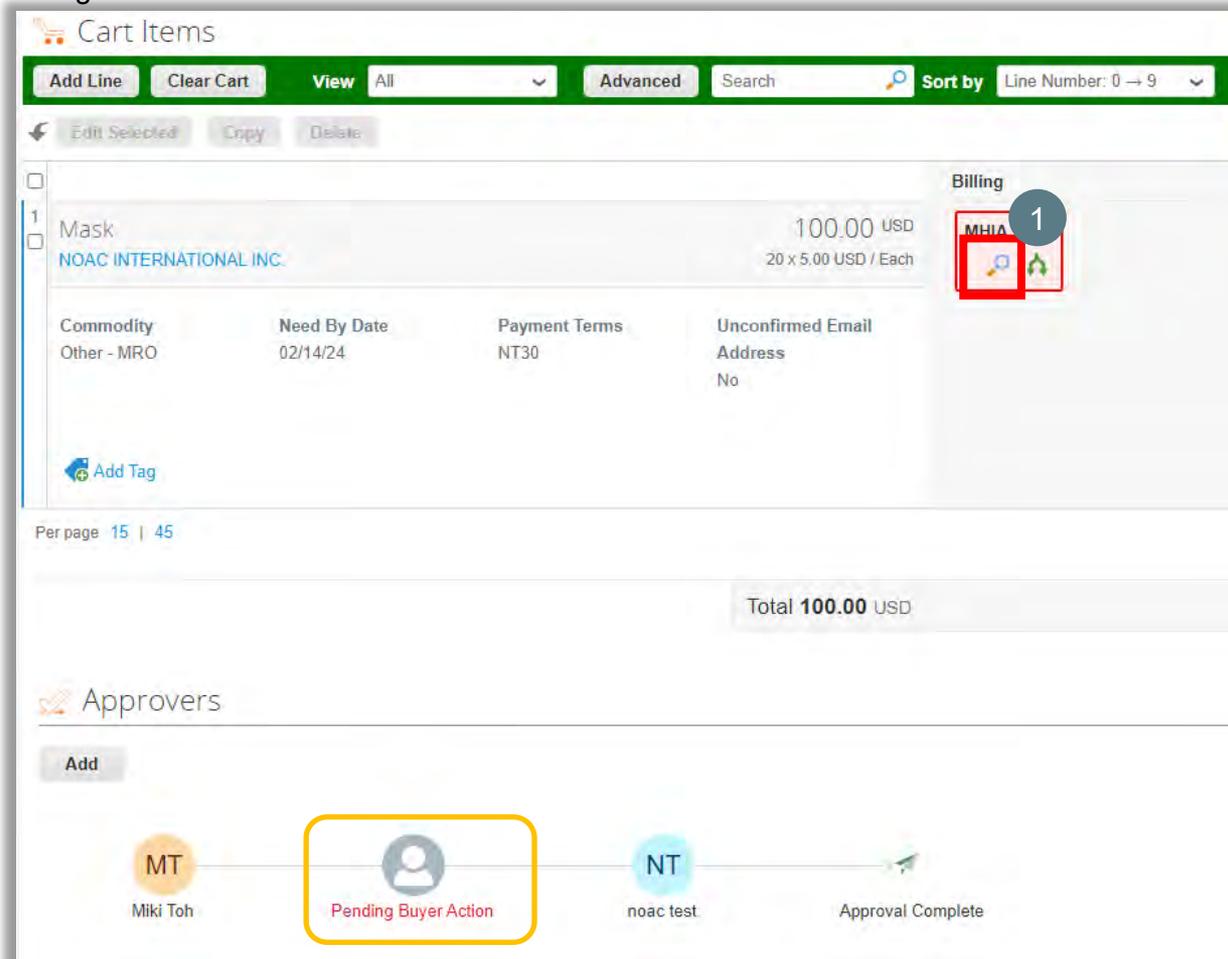


It is important for requesters to ensure all required information is complete. Requests that are not filled out with all the required information will not be able to be submitted and will receive “Pending Buyer Action” status. If requesters see “Pending Buyer Action” in the approval flow, they should check their request to see what is missing.

(14) Review and Edit Cart - Pending Buyer Action (Cont.)

If a requester does not enter complete billing information, they will receive a pending buyer action error.

1. If you have a Pending Buyer Action due to an error in your cost account information, please click on the “*magnifying glass icon*” under Billing.



Cart Items

Buttons: Add Line, Clear Cart, View: All, Advanced, Search, Sort by: Line Number: 0 → 9

Actions: Edit Selected, Copy, Delete

Commodity	Need By Date	Payment Terms	Unconfirmed Email Address
Other - MRO	02/14/24	NT30	No

Total 100.00 USD

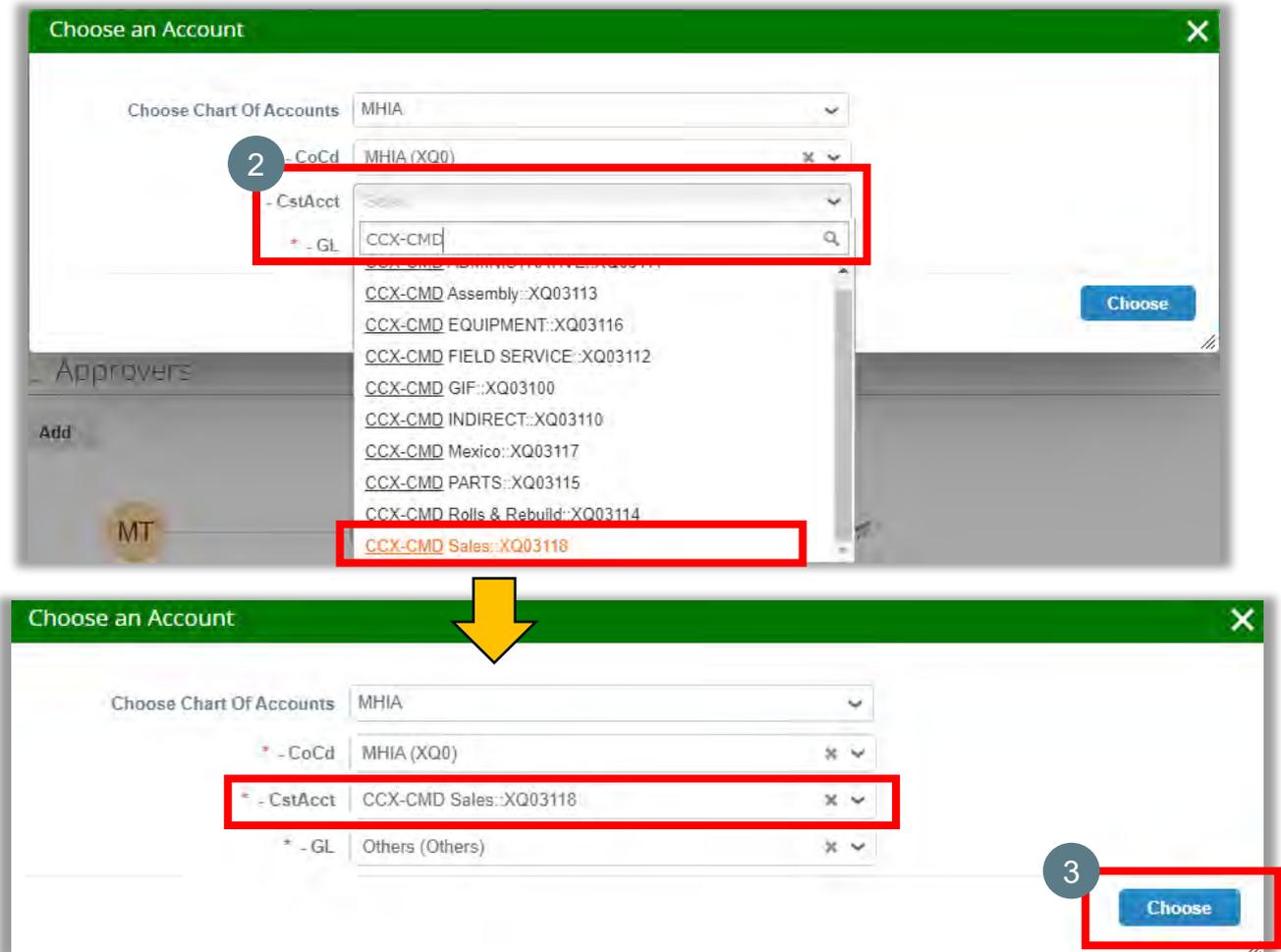
Approvers

Flow: MT (Miki Toh) → Pending Buyer Action → NT (noac test) → Approval Complete

(14) Review and Edit Cart - Pending Buyer Action (Cont.)

If a requester does not enter complete billing information, they will receive a pending buyer action error.

2. Enter the correct Cost Account starting with **CCX-** and choose from drop-down list of Cost Account.
3. Click **Choose**.



The first screenshot shows the 'Choose an Account' dialog box with the following fields:

- Choose Chart Of Accounts: MHIA
- CoCd: MHIA (XQ0)
- CstAcct: CCX-CMD
- GL: Others (Others)

The second screenshot shows the 'Choose an Account' dialog box with the following fields:

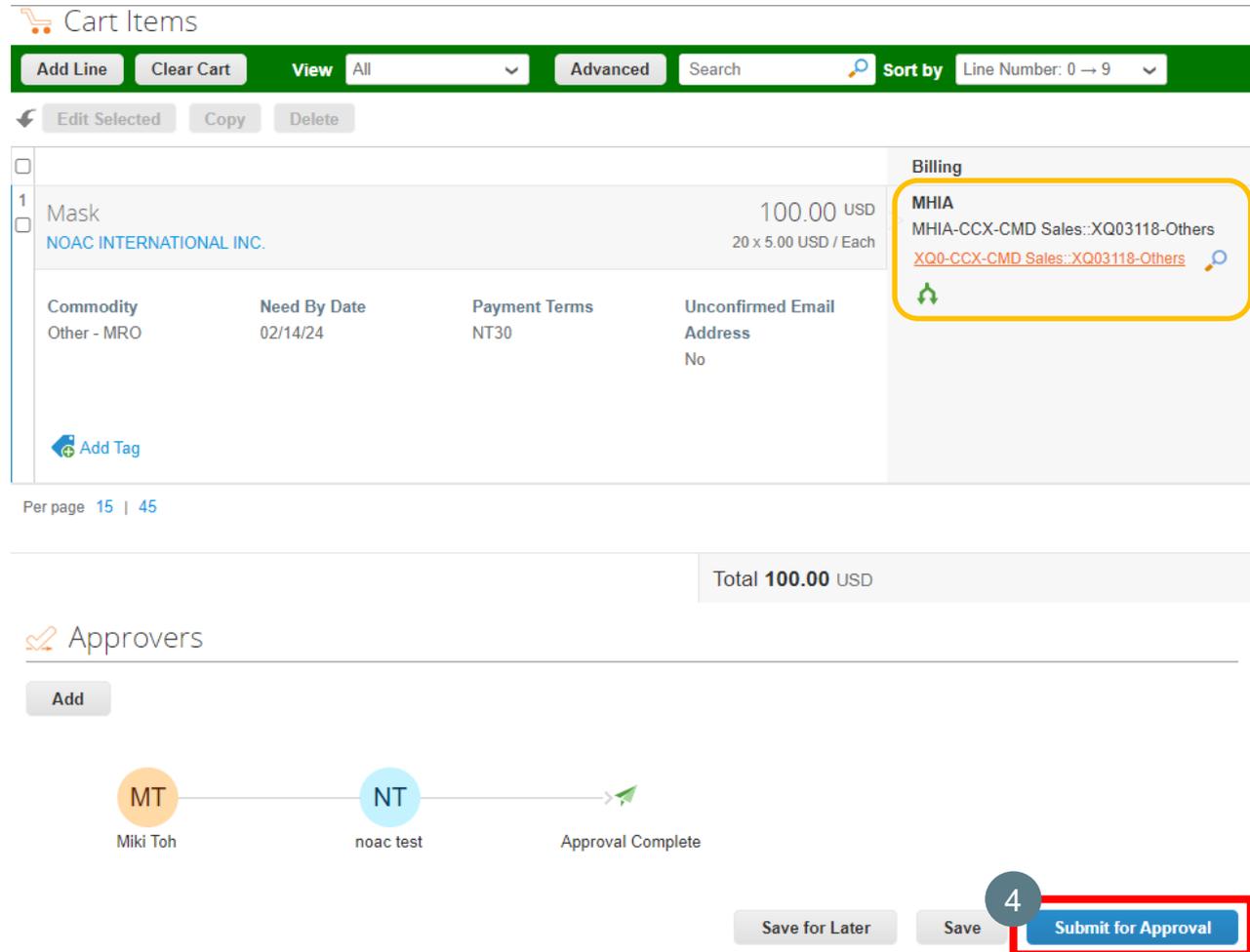
- Choose Chart Of Accounts: MHIA
- CoCd: MHIA (XQ0)
- CstAcct: CCX-CMD Sales::XQ03118
- GL: Others (Others)

Processing in the cart (Cont.)

(14) Review and Edit Cart - Pending Buyer Action (Cont.)

If a requester does not enter complete billing information, they will receive a pending buyer action error.

- When the Pending Buyer Action error in Approvers has been resolved, click **Submit**, and the Requisition will be automatically sent to the next Approver.



Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

Commodity	Need By Date	Payment Terms	Unconfirmed Email Address
Other - MRO	02/14/24	NT30	No

Billing

MHIA
MHIA-CCX-CMD Sales::XQ03118-Others
[XQ0-CCX-CMD Sales::XQ03118-Others](#)

Total 100.00 USD

Approvers

Add

MT Miki Toh → NT noac test → Approval Complete

Save for Later Save **4** Submit for Approval



DEMO

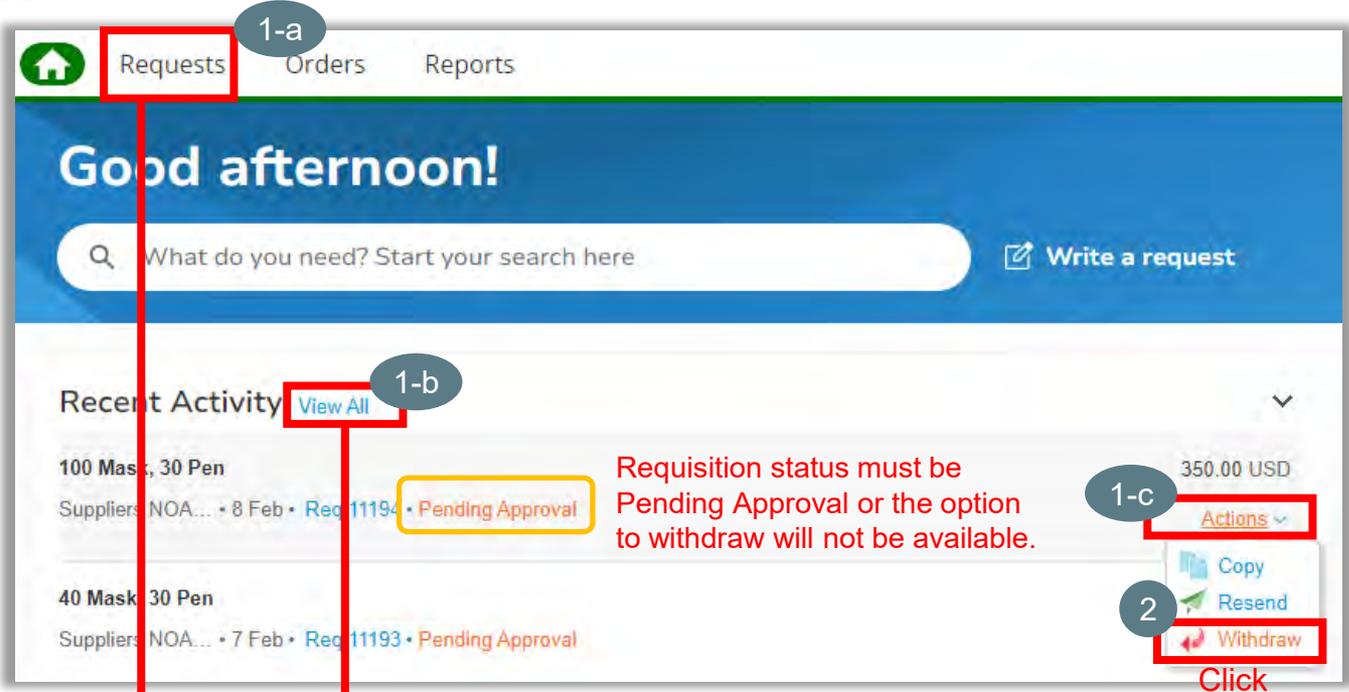
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What is possible after submitting a Requisition

(1) Request Change for requestor

A requester can modify the content of a submitted requisition using the withdraw function before the requisition is fully approved.

1. You can find the Withdraw icon from
 - a) Requests -> Requisitions
 - b) Recent Activity -> View All -> Requisitions
 - c) Recent Activity -> Actions
2. Click the **Withdraw Icon** with the red arrow



1-a

1-b

1-c

2

Click

Requisition status must be Pending Approval or the option to withdraw will not be available.

Click

Requisitions

Load from file Export to View All Advanced Search

Req #	Requested By	Submitted On	Status	Items	Total	Actions
11194	Miki Toh	02/08/24	Pending Approval	100 Mask from NOAC INTERNATIONAL INC. for 200.00 USD 30 Pen from NOAC INTERNATIONAL INC. for 150.00 USD	350.00 USD	

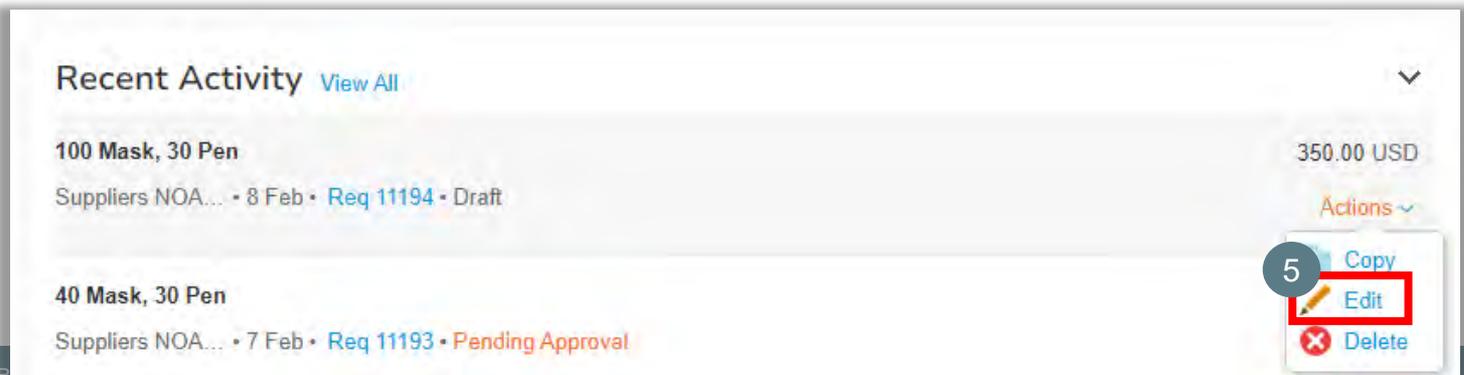
2

Click

What is possible after submitting a Requisition

(1) Request Change for requestor (Cont.)

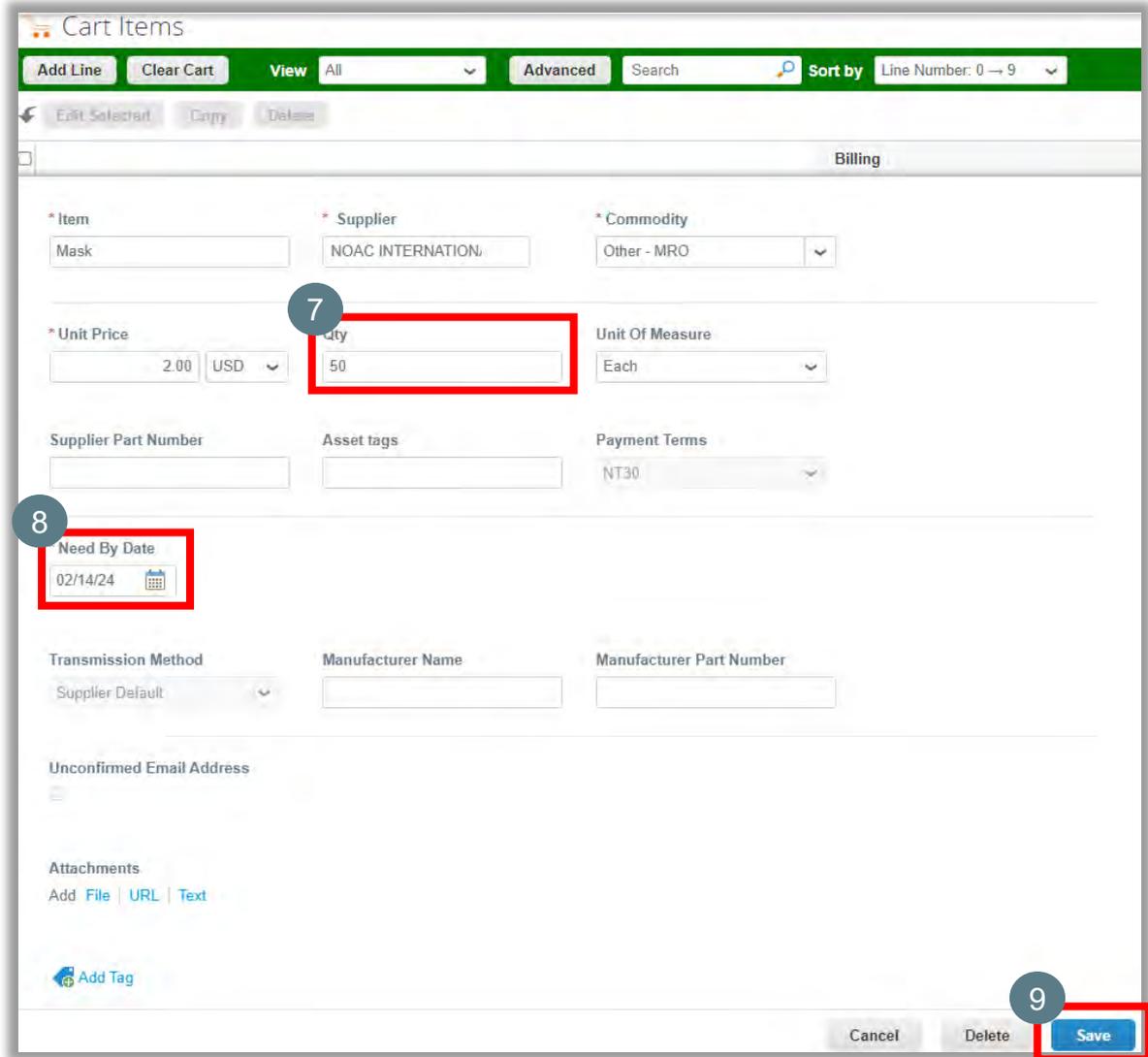
3. Then a message will appear asking if you want to confirm your withdrawal. If you want to proceed with clearing the cart, click the **OK** button.
4. The message “Successfully withdrew Requisition #...” will be displayed and the status will be changed from Pending Approval to Draft.
5. Click Pencil icon’s **Edit**.



What is possible after submitting a Requisition

(1) Request Change for requestor (Cont.)

8. Change the part of the request you want to change. Ex) change the Qty.
9. Select the Need by Date
10. After changing the requests, click **Save**



Cart Items

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 → 9

Edit Selected Copy Delete

Billing

* Item Mask * Supplier NOAC INTERNATIONAL * Commodity Other - MRO

* Unit Price 2.00 USD Qty 50 Unit Of Measure Each

Supplier Part Number Asset tags Payment Terms NT30

8 Need By Date 02/14/24

Transmission Method Supplier Default Manufacturer Name Manufacturer Part Number

Unconfirmed Email Address

Attachments Add File URL Text

Add Tag

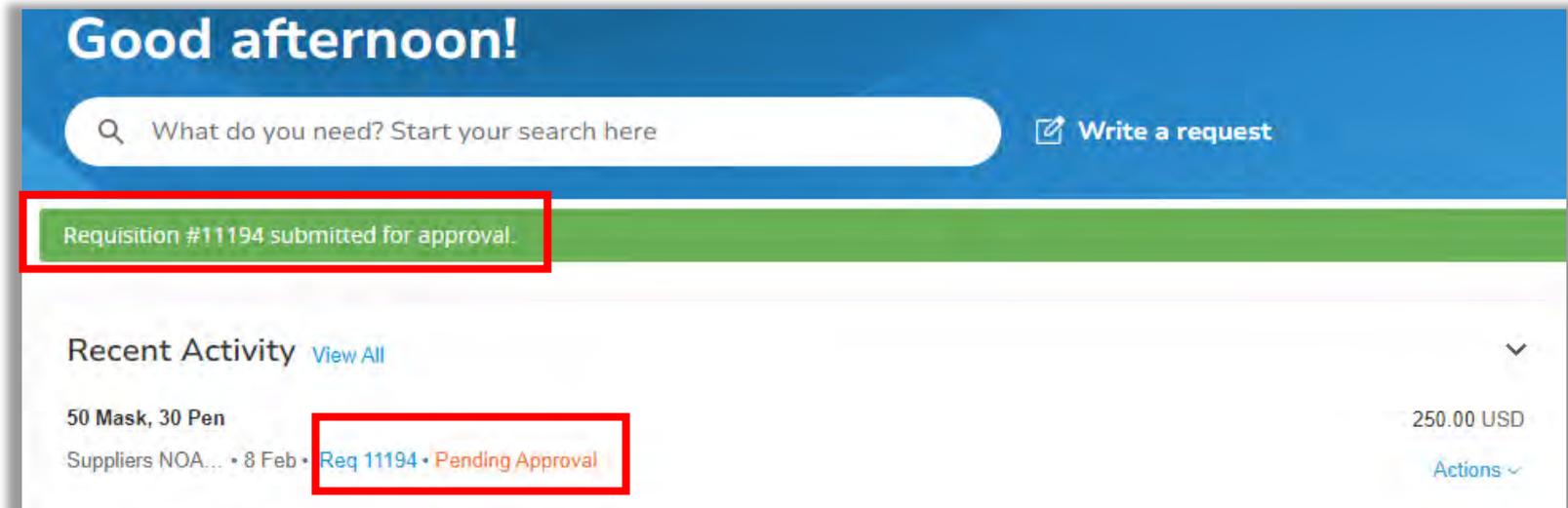
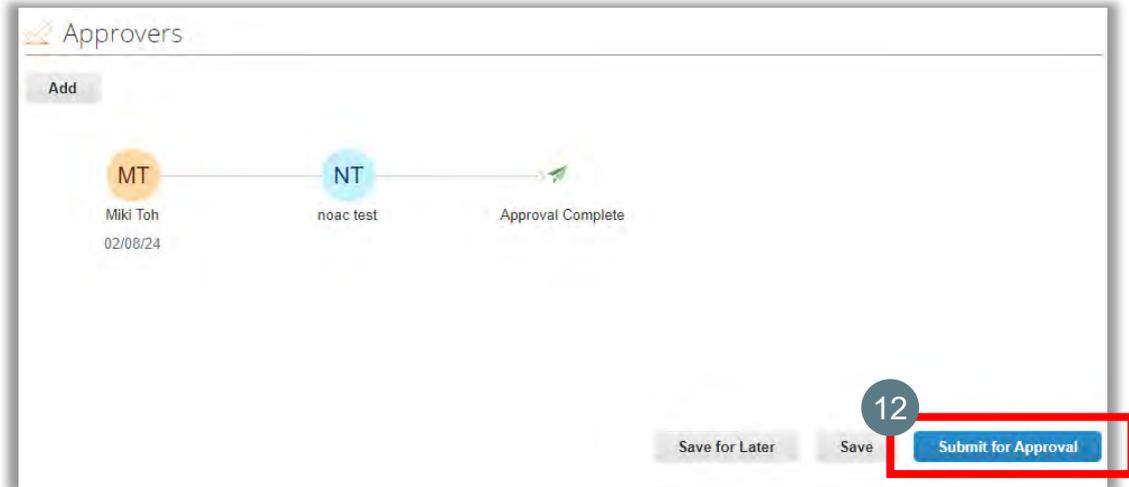
Cancel Delete Save

What is possible after submitting a Requisition

(1) Request Change for requestor (Cont.)

12. Review all requests and click [Submit for Approval](#).

13. The message "Requisition # submitted for approval." will be displayed. And the status changed to [Pending Approval](#).



(1) Request Change for requestor (Cont.)

14. After the request change, the next approver will receive an e-mail notification.

14

MITSUBISHI
HEAVY
INDUSTRIES
GROUP

Purchase Approval Request for Miki Toh - Requisition #11194

Hi noac,

Requisition #11194 from Miki Toh is ready for your approval! A rejection comment is needed to reject this approval request.

Submitted By Miki Toh

Total **250.00** USD

Item Mask	50 Each X 2.00	100.00 USD
------------------	----------------	------------

Supplier NOAC
INTERNATIONAL INC.

Item Pen	30 Each X 5.00	150.00 USD
-----------------	----------------	------------

Supplier NOAC
INTERNATIONAL INC.

View Req

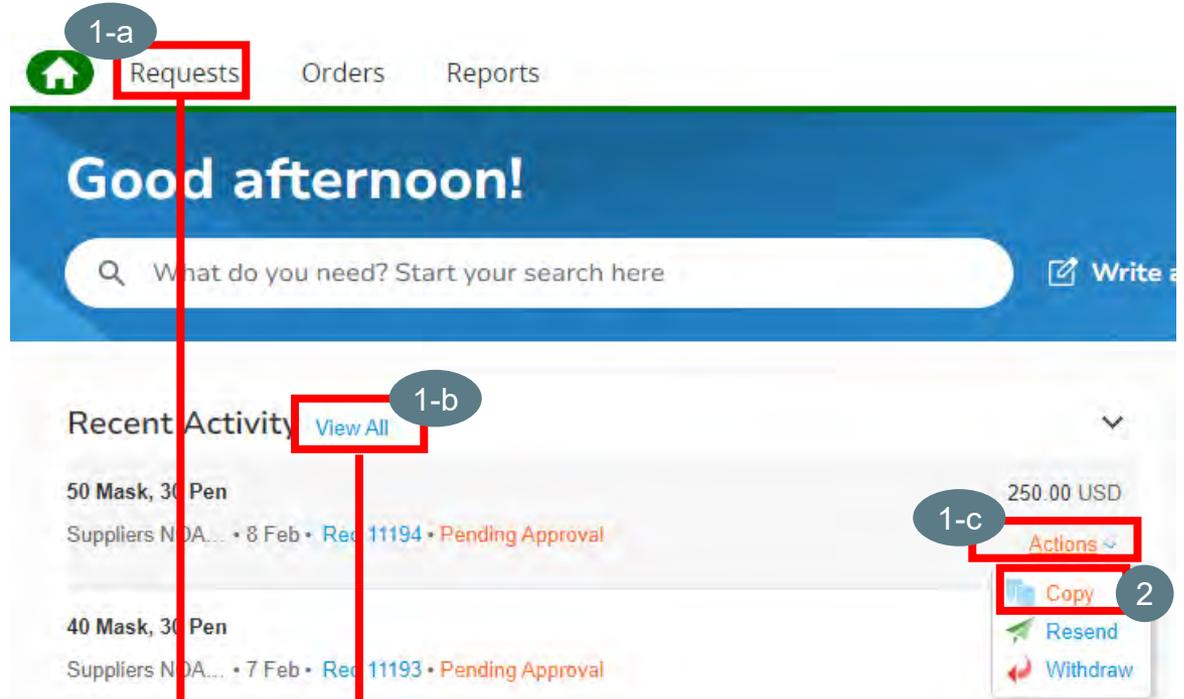
Reject

Approve

(2) Copy Requisition

1

1. You can find **Copy icon** from
 - a) Requests -> Requisitions
 - b) Recent Activity -> View All -> Requisitions
 - c) Recent Activity -> Actions
2. Click the **Copy icon** with the red arrow

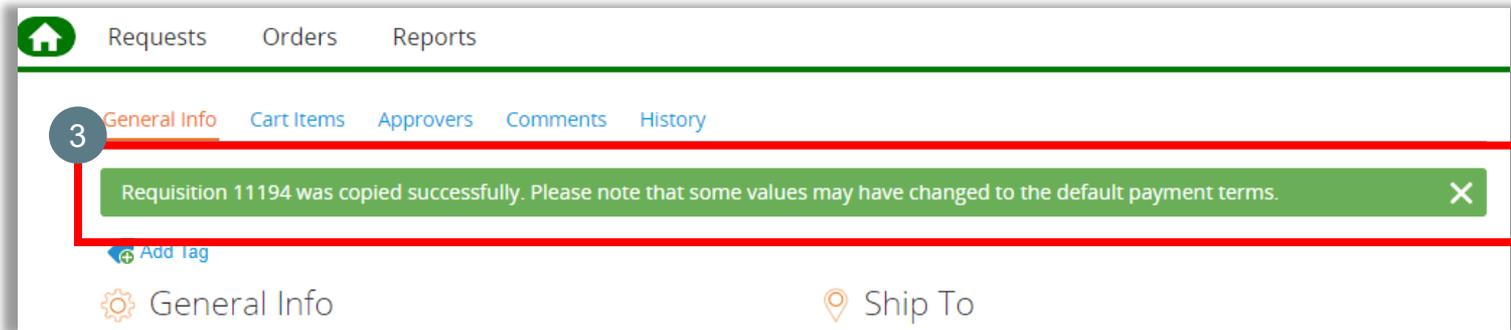


Req #	Requested By	Submitted On	Status	Items	Total	Actions
11194	Miki Toh	02/08/24	Pending Approval	50 Mask from NOAC INTERNATIONAL INC. for 100.00 USD 30 Pen from NOAC INTERNATIONAL INC. for 150.00 USD	250.00 USD	  
11193	Miki Toh	02/07/24	Pending Approval	40 Mask from NOAC INTERNATIONAL INC. for 200.00 USD 30 Pen from NOAC INTERNATIONAL INC. for 150.00 USD	350.00 USD	  

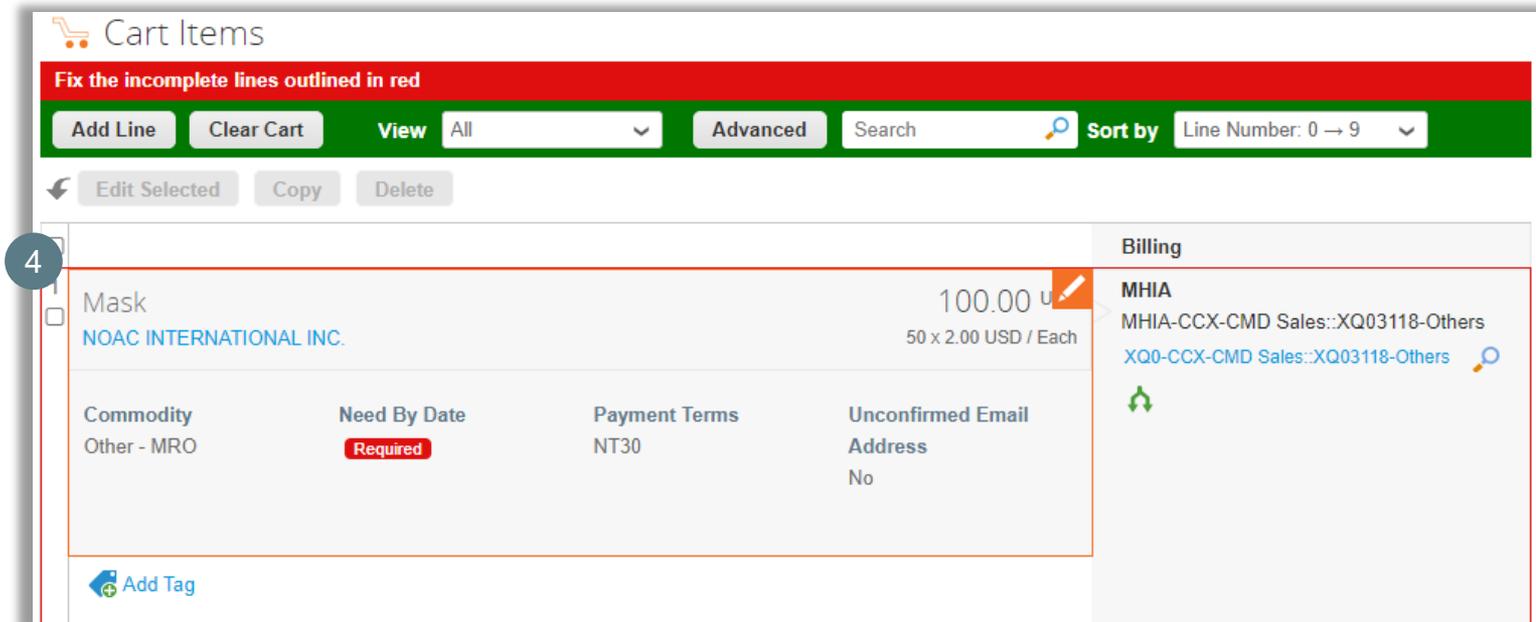
What is possible after submitting a Requisition

(2) Copy Requisition (Cont.)

3. After clicking Copy, the message "Requisition was copied successfully. Please note that some values may have changed to the default payment terms." will appear.
4. Navigate your cursor into the cart display window and click on it.



The screenshot shows the 'General Info' tab of a requisition. A green message box at the top states: "Requisition 11194 was copied successfully. Please note that some values may have changed to the default payment terms." A red box highlights this message. Below the message are tabs for 'General Info' and 'Ship To'.



The screenshot shows the 'Cart Items' window. A red banner at the top says "Fix the incomplete lines outlined in red". Below this are buttons for 'Add Line', 'Clear Cart', 'View', 'Advanced', 'Search', and 'Sort by'. A table of cart items is shown, with one item highlighted by a red outline:

Commodity	Need By Date	Payment Terms	Unconfirmed Email Address
Other - MRO	Required	NT30	No

The item is a 'Mask' from 'NOAC INTERNATIONAL INC.' with a price of 100.00 USD and a quantity of 50 x 2.00 USD / Each. The 'Billing' section shows 'MHIA' and 'MHIA-CCX-CMD Sales::XQ03118-Others'.

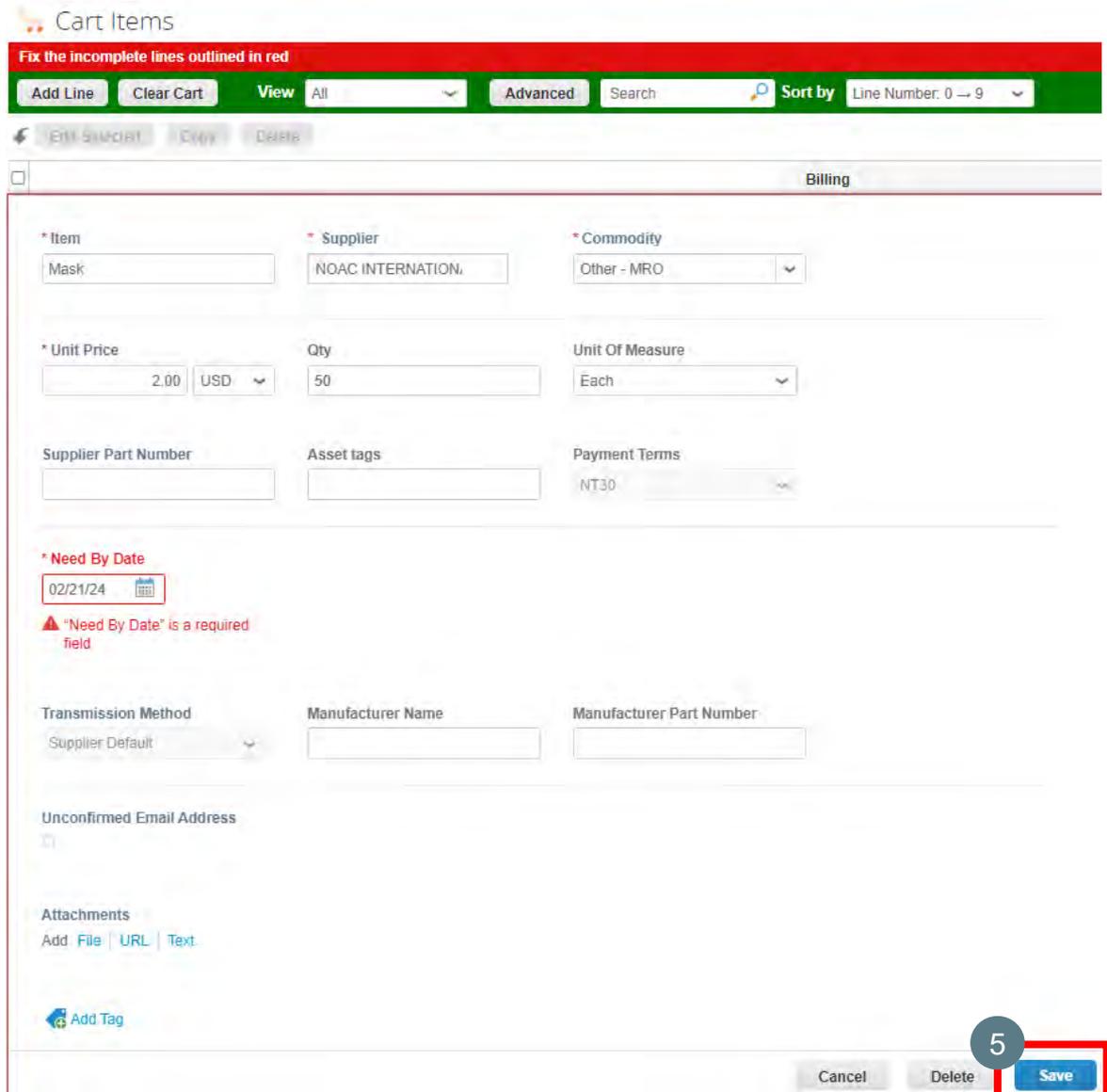
What is possible after submitting a Requisition

(2) Copy Requisition (Cont.)

5. Edit the item information and click **Save**

***Required**

- Item
- Supplier
- Commodity
- Unit Price
- Need by Date



Cart Items

Fix the incomplete lines outlined in red

Add Line Clear Cart View All Advanced Search Sort by Line Number: 0 -> 9

EM SUPPORT Copy Data

Billing

* Item: Mask

* Supplier: NOAC INTERNATIONAL

* Commodity: Other - MRO

* Unit Price: 2.00 USD

Qty: 50

Unit Of Measure: Each

Supplier Part Number

Asset tags

Payment Terms: NT30

* Need By Date: 02/21/24

▲ "Need By Date" is a required field

Transmission Method: Supplier Default

Manufacturer Name

Manufacturer Part Number

Unconfirmed Email Address

Attachments: Add File | URL | Text

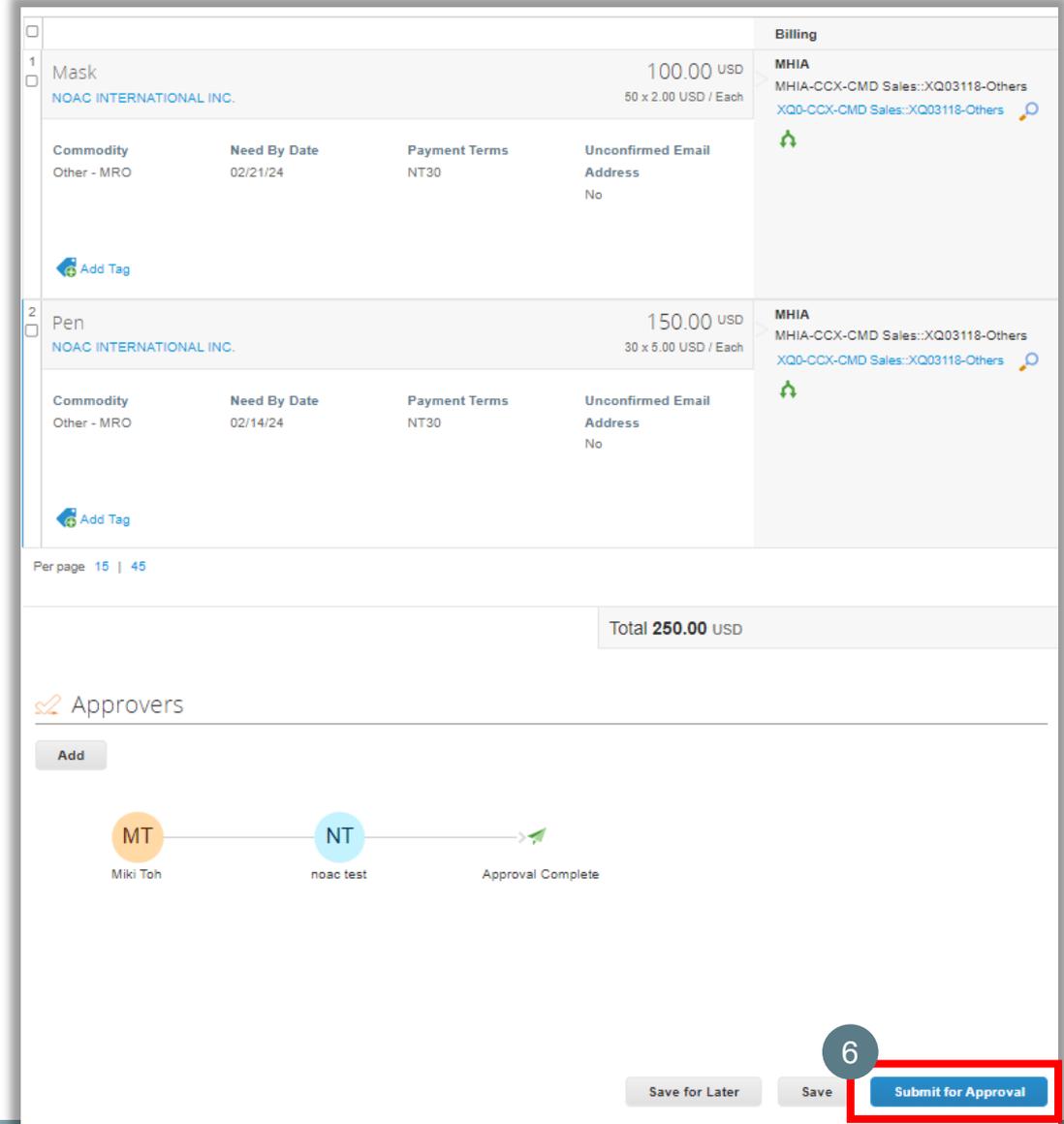
Add Tag

Cancel Delete **5 Save**

What is possible after submitting a Requisition

(2) Copy Requisition (Cont.)

6. When all items in this request have been modified, review the contents and **Submit for Approval**.



Item	Description	Unit Price	Quantity	Total Price
1	Mask NOAC INTERNATIONAL INC.	100.00 USD 50 x 2.00 USD / Each		
2	Pen NOAC INTERNATIONAL INC.	150.00 USD 30 x 5.00 USD / Each		

Per page: 15 | 45

Total 250.00 USD

Approvers

Add

MT (Miki Toh) → NT (noac test) → Approval Complete

Buttons: Save for Later, Save, **Submit for Approval** (highlighted with a red box and circled number 6)

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In Coupa, there are a few points in the transaction where you may be required to approve for varying reasons.

1. Requisition Approval

- You are part of the requester's managerial hierarchy
- The requester has added you as an ad hoc approver
- Someone has entered a requisition on your behalf

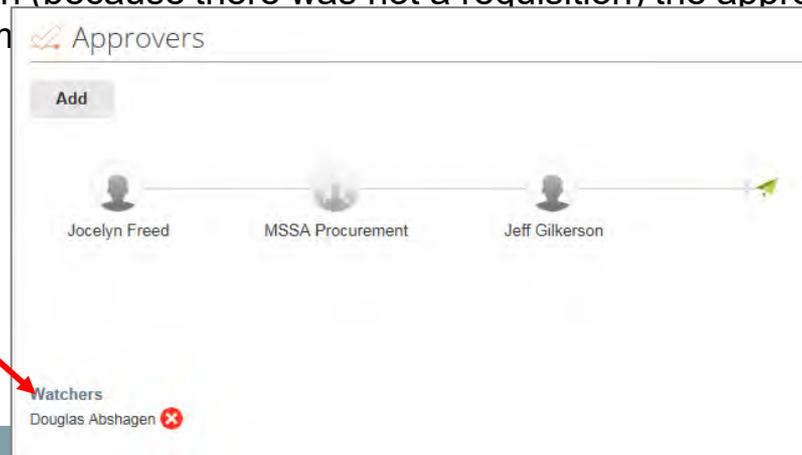
2. PO Approval

- You are part of the requester's managerial hierarchy and he/she has requested a change order

3. Invoice Approval

- You are the requester and need to validate a service by approving the invoice
- You are the requester or part of the requester's managerial hierarchy and a tolerance has failed. Since the invoice did not match the PO, after routing to AP, it will route to the requester and the requester's managerial hierarchy for re-approval.
- You are the requester for a Non PO Invoice transaction. Since this transaction does not have documented approvals on the requisition (because there was not a requisition) the approval will route to the requester and requester's m

Watchers can be added on an ad hoc basis. They're notified at the point of submission and full approval. Watchers are not required to take action, versus approvers who need to take action in the system.



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Approval Matrix (DOA)

- The new DOA (used for Coupa purchases) identifies a single approval threshold depending on the employees assigned approval level:

Approval Limit	£0K	£10k	£50K	£>50K
Typical Job Titles	<ul style="list-style-type: none">▪ Secretary▪ Officer	<ul style="list-style-type: none">▪ Manager▪ Deputy General Manager	<ul style="list-style-type: none">▪ General Manager▪ Director	<ul style="list-style-type: none">▪ COO

NOTE: Self approval is not permitted. A request will automatically route to the requester's next approver, regardless of approval level or dollar amount of the request.

1. Review requisition header to understand purchase and justification
2. Review requisition line(s) to understand each item/service being requested, along with supplier, price, and other information and comments
3. Open any given attachments to validate any required supporting documentation
4. Validate the accounting string to ensure that the good or service is being billed to the correct account
5. Enter any approval/rejection comments – comments required for Rejections (**be detailed so the requester knows exactly what changes to make**)
6. Click “Approve” or “Reject”

NOTE: Upon rejection, Requisition routes back to the requester and is placed in “Draft” status

Requisition #559 (Pending Approval)

General Info | Cart Items | Approvers | Comments | History

General Info

Created By: Ryan Crall
Requested By: Ryan Crall (change)
Justification: None
Attachments: Supplier_Quote.docx

Ship-To Address

Address: 20 Greenway Plaza
Houston, TX 77046
United States
Attn: Ryan Crall

Cart Items

Advanced | Search | Sort by | Line Number: 0 - 9

Safety Supplies Freed (Test) Industries	51,000.00 USD 1 x 51,000.00 USD / Each	Billing MHIA -1111 - HQ GENERAL- Expense_Repair & Maintenance XG0-XG01111-2724A00000 Period: None
--	---	---

Commodity: General MRO Supplies

Item_Justification.docx

Per page: 15 / 45

Approvers

Added by the approval chain MSSA Procurement Approval For Reqs Over \$50k

Add

Approval Chain: Ryan Crall (05/02/18) - MSSA Procurement - Jocelyn Freed - Jeff Gilkerson

Comment (required to reject)

Provide approval/rejection comment here

More Actions | Reject | Approve

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Approving a Requisition: Options for Approval

Once a requisition has been routed to you for approval, there are two ways to approve or reject a requisition in Coupa

1. **Email:** directly from your inbox
2. **To Do list:** on your Coupa Homepage

1

Purchase Approval Request for Ryan Crall - Requisition #559

Hi Ryan,

Requisition #559 from Ryan Crall is ready for your approval! If you want to reject the requisition, you'll need to provide a rejection comment.

Submitted By Ryan Crall
Total **51,000.00** USD

Items	Safety Supplies	1 @ 51,000.00	51,000.00 USD
	Supplier Freed (Test) Industries		

Looks good - want to approve?
Click the approve button below or simply reply to this email with the word **Approve**.

Something's wrong - need to reject?
No worries, just click the reject button below or reply to this email with the word **Reject**. Comments are required.

Need more info?
Click **View Req** and you'll be taken online to see everything.

[View Req](#)

2

To Do 1 more in your [inbox](#)

Purchase Approval for Ryan Crall - Requisition #559

[Hide](#) • [Reject](#) •

Req #569 requires action
Requested By Jeff Mooney

[Hide](#) •

Req #555 requires action
Requested By Harriett Williams

[Hide](#) •

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Approvers can approve/reject invoices the same ways as they do requisitions

1. **Email:** directly from your inbox
2. **To Do list:** on your Coupa Homepage

1

Purchase Approval Request for Ryan Crall - Requisition #559

Hi Ryan,

Requisition #559 from Ryan Crall is ready for your approval! If you want to reject the requisition, you'll need to provide a rejection comment.

Submitted By Ryan Crall
Total **51,000.00** USD

Items **Safety Supplies** 1 @ 51,000.00 51,000.00 USD
Supplier Freed (Test) Industries

Looks good - want to approve? Click the approve button below or simply reply to this email with the word Approve .	Something's wrong - need to reject? No worries, just click the reject button below or reply to this email with the word Reject . Comments are required.	Need more info? Click View Req and you'll be taken online to see everything.
---	---	---

[View Req](#)

2

To Do 1 more in your [inbox](#)

Purchase Approval for Ryan Crall - Requisition #559

[Hide](#) • [Reject](#) •

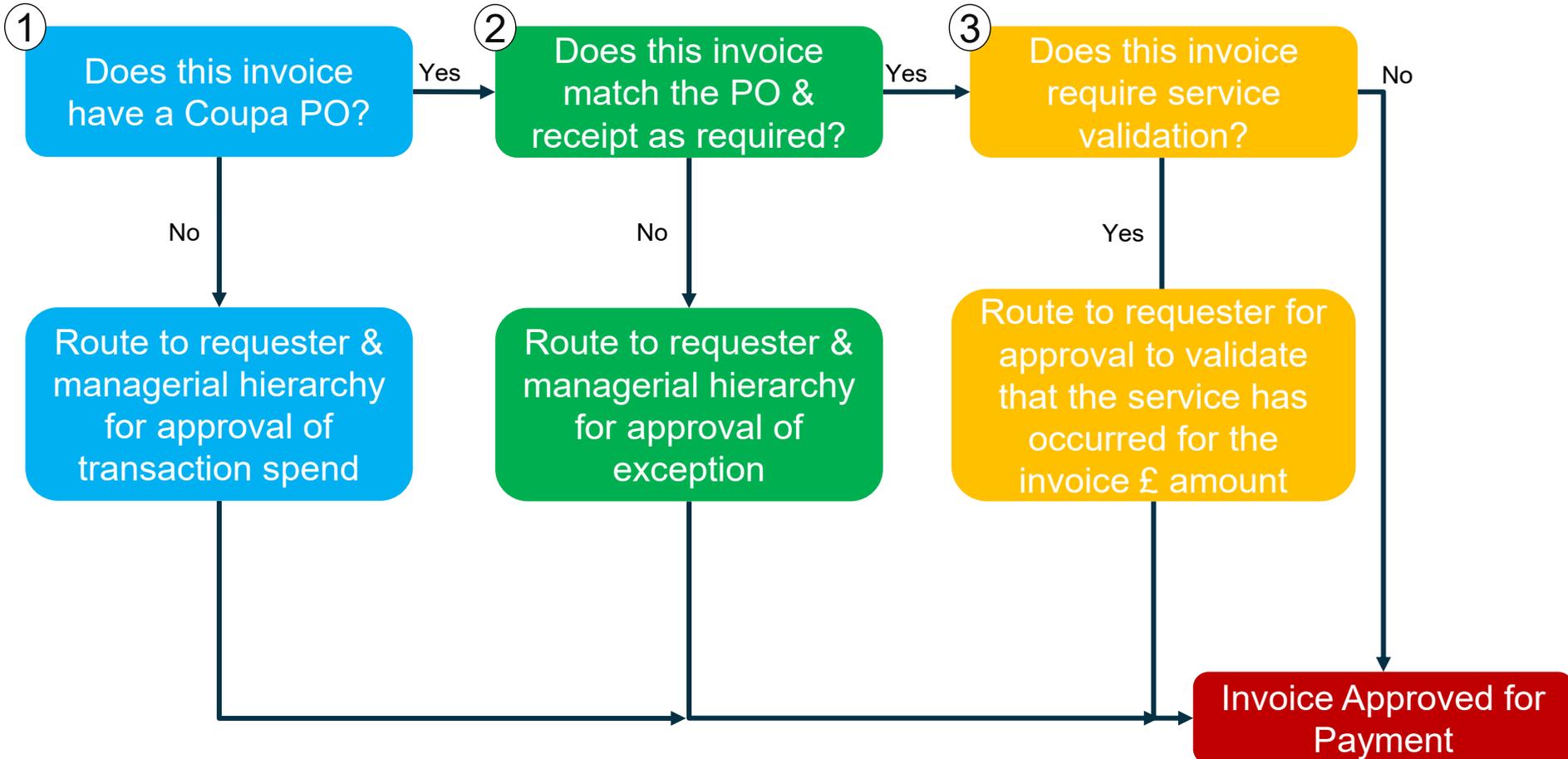
Req #569 requires action
Requested By Jeff Mooney

[Hide](#) •

Req #555 requires action
Requested By Harriett Williams

[Hide](#) •

Invoice comes into Coupa



Standardized Invoice Tolerances

Tolerance Type	Tolerance Amount (if applicable)	Tolerance Percentage (if applicable)
Misc greater than	£0	
Shipping greater than	£0	
Shipping as percent of total invoice greater than		0.00%
Invoice Currency does not match PO Currency	Exact Match required	
Invoice line unit price compared to PO line unit price	£0	
Invoice line unit price compared to PO line unit price (%)		0.00%
Amount Invoiced compared to amount ordered	£0	
Amount Invoiced compared to amount ordered (%)		0.00%
Quantity invoiced compared to quantity ordered	0	
Quantity invoiced compared to quantity ordered (%)		0.00%
Invoice Line Unit of Measure does not match PO Line Unit of Measure	Exact Match required	
Total taxes as percent of total invoice greater than		00.00%

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- If an invoice is routed to you for approval and you do NOT approve, you should:
 1. Reject the invoice including the reason for the dispute



* Comment (required to reject)
Provide approval/rejection comment here

Reject Approve

2. Email MHI-EMEA AP informing them to officially create a dispute in Coupa
3. MHI-EMEA AP will dispute the invoice in supplier. You will get an email when AP creates the dispute in Coupa and the invoice will have a status of “Disputed” in Coupa.
4. Reach out to the supplier directly to resolve the dispute and request that they resend a correct invoice
5. The corrected invoice will be re-routed for approval as required

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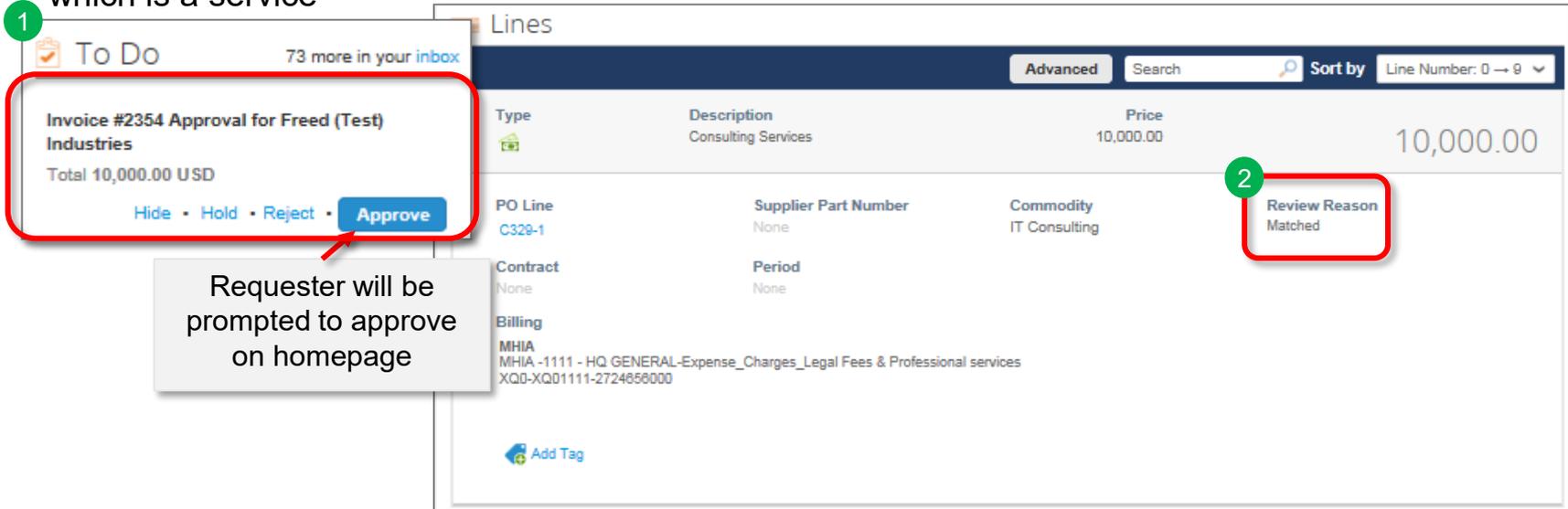
- Receipts are recorded in two different ways, depending on if the transaction includes a **goods** commodity or **services** commodity
 - Services require “Service Validation” approval on the invoice by the requester.
 - Goods require a Goods Receipt to be entered into the system

Goods Commodities (Requiring Goods Receipt)		Service Commodities (Requiring Service Validation)	
<ul style="list-style-type: none"> • Real Property Leasing • Safety Supplies • Tangible Assets Leasing • Office Furniture • Office Supplies • Employee Benefits • Computer Peripherals • Computers, Monitors & Storage Devices • Desktop Software • Other - MRO 	<ul style="list-style-type: none"> • Print Services • Promotional Products • P&C Insurance • Audio Conference Call Lines • Mobile Phones – Hardware & Service • Telecom Equipment • Enterprise Software • IT Network Hardware • Multi-Function Devices • Servers & Storage • General MRO Supplies 	<ul style="list-style-type: none"> • IT Consulting • IT Managed/Outsourced Services • Software Development • Telecom Services • Other – IT • Other – Telecom • Digital & Print Creative Services • Events & Trade Shows • Market Research • Media Buy • Sponsorships • Other – Marketing • Waste Removal • Other – Energy & Utilities • Catering Services • Research Equipment & Services • Other – Research • Other – Mail Services 	<ul style="list-style-type: none"> • Cafeteria Services • Facility Maintenance • Janitorial Services • Security Services • Other – Facilities • Other – G&A • Employee Relocation Services • Employee Training • Other – HR Services • Recruitment Services • Temporary Staffing • Accounting & Audit Services • Consulting Services • Legal Services • Other – Professional Services • Translation Services • Small Parcel • Mail Delivery • Other - Misc

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Requesters will be required to approve invoices as validation of the service they have been invoiced for

- Service validations will appear in Coupa as invoice approvals. When a supplier invoices for a service, the original requester will receive a notification asking them to approve the invoice.
 - Approving the request indicates that the service was completed and the invoice can be paid
- For example, see the below service validation for a purchase that has the commodity “IT Consulting,” which is a service



1

To Do 73 more in your inbox

Invoice #2354 Approval for Freed (Test)
Industries
Total 10,000.00 USD

Hide • Hold • Reject • **Approve**

Requester will be prompted to approve on homepage

2

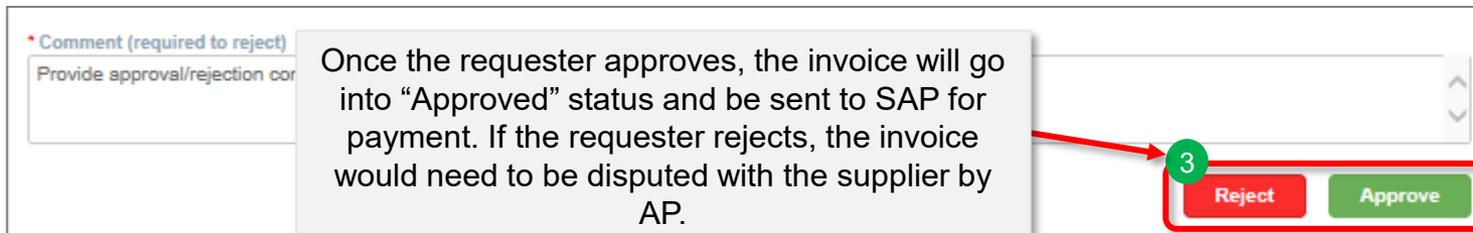
Type	Description	Price	
Consulting Services	Consulting Services	10,000.00	10,000.00

PO Line C329-1 Supplier Part Number None Commodity IT Consulting

Contract None Period None

Billing
MHIA
MHIA -1111 - HQ GENERAL-Expense_Charges_Legal Fees & Professional services
XQ0-XQ01111-2724858000

Add Tag



3

Comment (required to reject)
Provide approval/rejection comment

Once the requester approves, the invoice will go into “Approved” status and be sent to SAP for payment. If the requester rejects, the invoice would need to be disputed with the supplier by AP.

Reject Approve

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- Once a requisition for select commodities has been approved, the purchase order issued, and the goods have physically been received by the end user, a formal receipt in Coupa is required
- Users can enter receipts via the Home Page or Activity page

This Week

Consulting Services Supplier Freed (Test) Industries • Req 613 • PO C329 • 6 May • Ordered	10,000.00 USD	Actions
Temporary Staffing Supplier Freed (Test) Industries • Req 609 • PO C324 • 4 May • Ordered	10,000.00 USD	Actions
Temporary Staffing Supplier Freed (Test) Industries • Req 607 • PO C317 • 3 May • Received	100.00 USD	Actions
4 Glue Top Writing Pads, Legal Rules, Dozen Supplier WB Mason • Req 607 • PO C317 • 3 May • Received	131.44 USD	Actions
IT Consulting services, 7 Monitor, 5 Cables Supplier Freed (Test) Industries • Req 598 • PO C317 • 3 May • Received		Copy Receive

Users can navigate to Activity by hovering over his/her name in the top right corner

JOELYN

- Activity
- Settings
- Inbox
- Sign Out

Activity

Requisitions Orders Order Changes Invoices Receipts Forms ASN's Tasks

Req #	Requested By	Submitted On	Status	Items	PO ID	Actions
614	Jocelyn Freed	None	Draft			
613	Jocelyn Freed	05/06/18	Ordered	Consulting services from Freed (Test) Industries for 10,000.00 USD	#329	Receive

- Clicking on the “truck” icon will bring you to the receipt page

If there are multiple line items, checking the “Quick Receipts” box will receive all items from every line

Line	Item	Supplier	Qty	UOM	Price	Line Total	Need by	Received	PO Number	Receipt Date	Quick Receipts	Attachments
1	Lenovo Thinkpad Laptop	MHI CSP Test	2	Each	450.00	900.00	None	0	21	mm/dd/yy	<input type="checkbox"/>	<input type="checkbox"/> All Add File

Always type in the receipt date

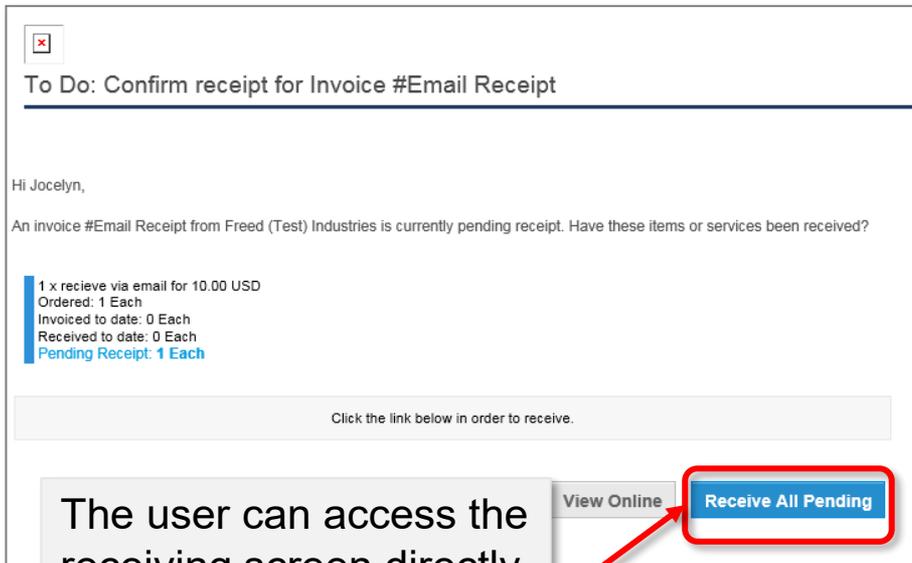
To partially receive a line, type in the number to be received

Checkbox allows users to fully receive a single line

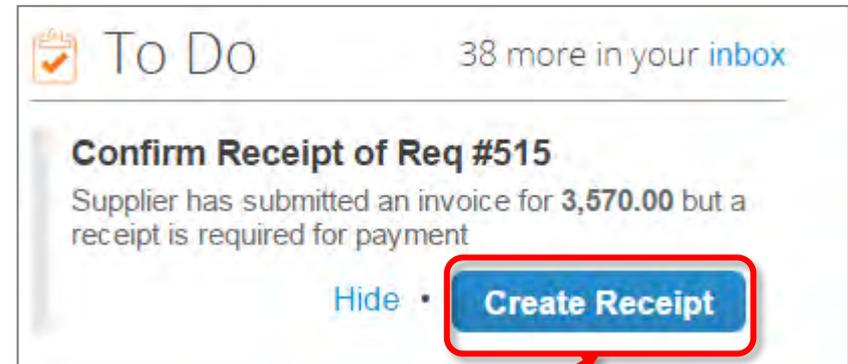
Goods Receipt Notification

If an invoice is received in Coupa for a goods purchase before a goods receipt is entered, the requester is notified of an order pending receipt. The invoice will not be processed until the goods receipt is entered.

- Notification will be sent via email, as well as via the user's To-Do List on the Coupa homepage



The user can access the receiving screen directly via email by clicking "Receive All Pending"



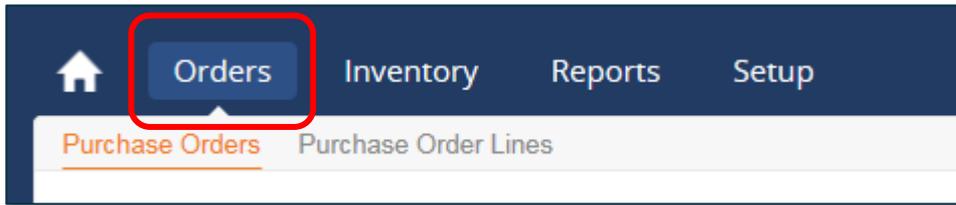
The user can also access the receiving screen via the To Do List by clicking "Create Receipt"

- Once the receiving screen has been accessed, follow the steps on the previous slides to complete receipt

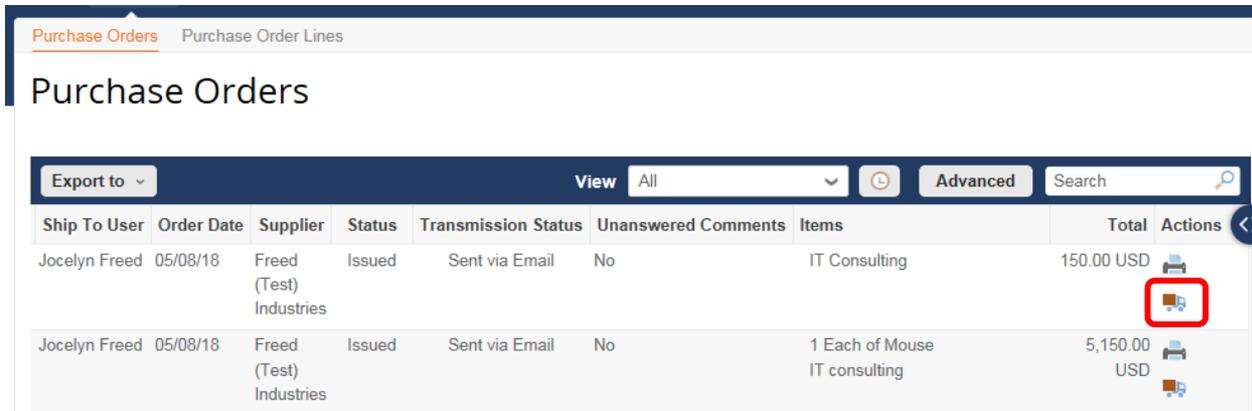
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The Central Receiving role in Coupa allows users to receive against PO's they did not request. Users without this role can only enter Goods Receipts for requests they've submitted.

1. Navigate to the Orders tab. Central receivers have access to this tab, which end users without central receiving role do not have.



2. Click on the truck icon next to the order that needs to be received.



Purchase Orders

Export to View All Advanced Search

Ship To User	Order Date	Supplier	Status	Transmission Status	Unanswered Comments	Items	Total	Actions
Jocelyn Freed	05/08/18	Freed (Test) Industries	Issued	Sent via Email	No	IT Consulting	150.00 USD	
Jocelyn Freed	05/08/18	Freed (Test) Industries	Issued	Sent via Email	No	1 Each of Mouse IT consulting	5,150.00 USD	

Central Receiving

cont'd

3. Complete receive fields

On-Hand Balances Receive View Receipts Unreceived Orders Ac

Receive Requisition #82

View All Advanced Search

Line	Item	Supplier	Qty	UOM	Price	Line Total	Need by	Received	PO Number	Receipt Date	Quick Receipts	Attachments
1	Lenovo Thinkpad Laptop	MHI CSP Test	2	Each	450.00	900.00	None	0	21	mm/dd/yy	<input type="checkbox"/> All	

Per page 15 | 45 | 90

If there are multiple line items, checking the "Quick Receipts" box will receive all items from every line

Always type in the receipt date

To partially receive a line, type in the number to be received

Checkbox allows users to fully receive a single line

4. Save Receipt

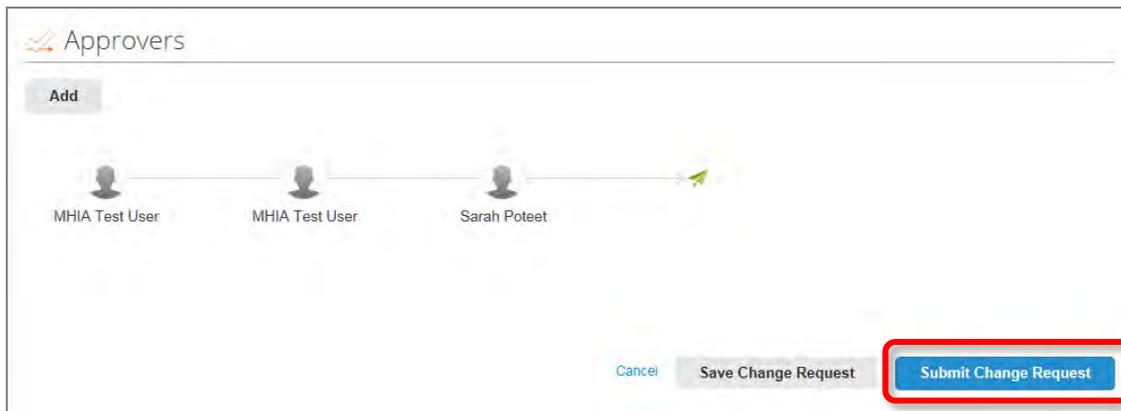


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- Changes to the PO can be made until the PO has been fully received. If the PO has not been fully received the option for “Request Change” will appear at the bottom of the PO details



- The PO will become open for editing and the requester can update the PO with necessary changes. The change request will be rerouted through required approvals.

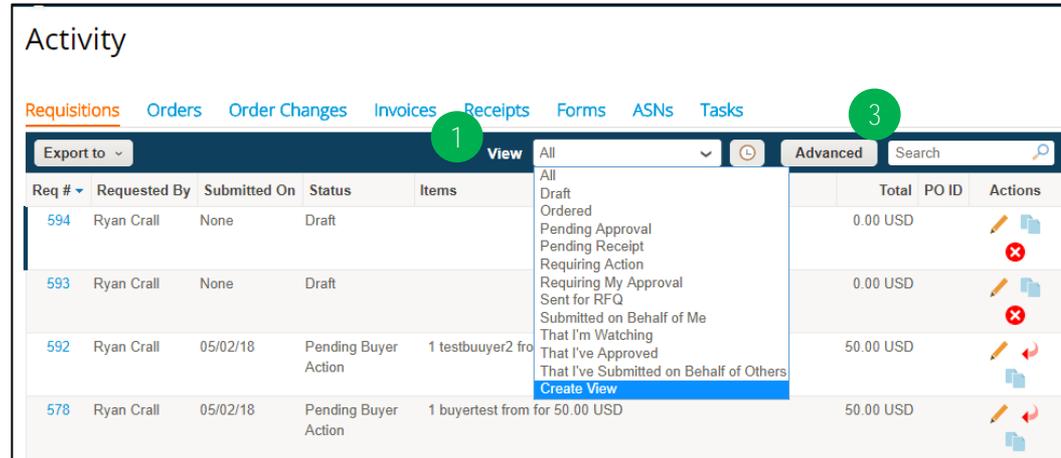


- Once approved, the Change order will be submitted to the supplier.
- Note: Applying a PO Change Request to a cXML vendor will trigger a re-order.

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- Users can “Create Views”, schedule reports, and filter desired attributes on nearly every Coupa Object.

1. Pre-configured reports or custom reports created via “Create View” functionality
2. Users can schedule regular e-mail distribution of Standard and Custom Coupa Reports
3. Advanced Filter functionality on various objects (Users, Orders, Requisitions, Invoices, etc.)



Activity

Requisitions Orders Order Changes Invoices Receipts Forms ASNs Tasks

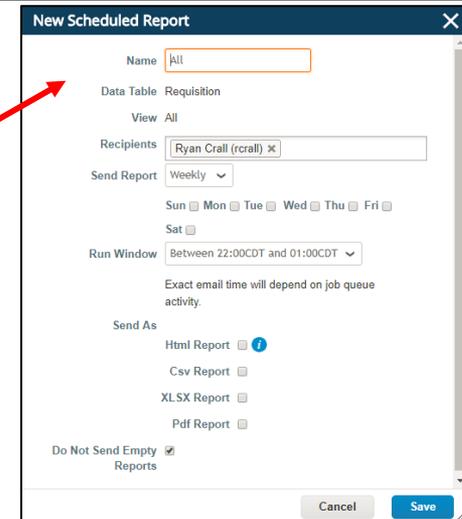
Export to View All

Req #	Requested By	Submitted On	Status	Items	Total	PO ID	Actions
594	Ryan Crall	None	Draft		0.00 USD		[Edit] [Share] [Delete]
593	Ryan Crall	None	Draft		0.00 USD		[Edit] [Share] [Delete]
592	Ryan Crall	05/02/18	Pending Buyer Action	1 testbuyer2 fro	50.00 USD		[Edit] [Share] [Delete]
578	Ryan Crall	05/02/18	Pending Buyer Action	1 buyertest from for 50.00 USD	50.00 USD		[Edit] [Share] [Delete]

View All
Draft
Ordered
Pending Approval
Pending Receipt
Requiring Action
Requiring My Approval
Sent for RFQ
Submitted on Behalf of Me
That I'm Watching
That I've Approved
That I've Submitted on Behalf of Others
Create View



View All [Advanced]



New Scheduled Report

Name: All

Data Table: Requisition

View: All

Recipients: Ryan Crall (rcrall) x

Send Report: Weekly

Sun Mon Tue Wed Thu Fri Sat

Run Window: Between 22:00CDT and 01:00CDT

Exact email time will depend on job queue activity.

Send As:
Html Report [i]
Csv Report
XLSX Report
Pdf Report

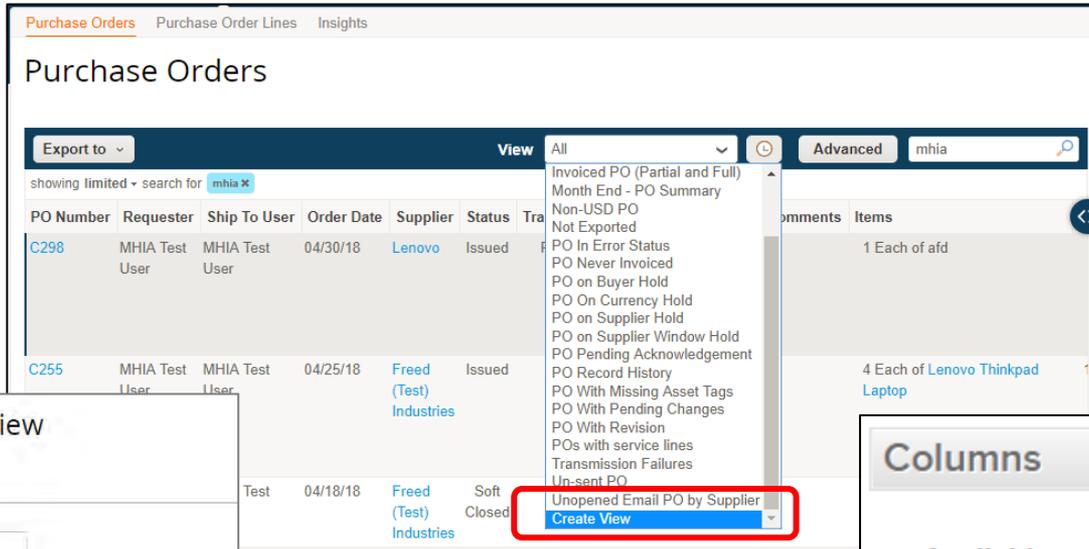
Do Not Send Empty Reports

Cancel Save

Reporting in Coupa

Creating Custom Views (Reports)

- Custom views can be created on nearly all Coupa objects (suppliers, purchase orders, requisitions, invoices, etc)
- They can be exported to Microsoft Excel



Purchase Orders

Export to View All

Advanced mhia

showing limited - search for mhia

PO Number	Requester	Ship To User	Order Date	Supplier	Status	Tr
C298	MHIA Test User	MHIA Test User	04/30/18	Lenovo	Issued	
C255	MHIA Test User	MHIA Test User	04/25/18	Freed (Test) Industries	Issued	
Test			04/18/18	Freed (Test) Industries	Soft Closed	

Unopened Email PO by Supplier
Create View

Create New data table view

General

Name

Visibility Only Me
 Everyone
 Restrict by content group

Start with view

Conditions

Apply of these conditions:

is

- 1 Name your report, define who should be able to view it, and create as many filters/conditions as needed
- 2 Adjust which columns are visible in the report by dragging the boxes

Columns

Available columns	Selected columns
Comments	PO #
Created By	Requester
Currency	Ship To User
Least Exported At	Order Date

Reporting in Coupa

Creating Scheduled Custom or Standard Reports

Invoices Invoice Lines Invoice Inbox Uninvoiced Orders Accrual Report Export to Account

Invoices

Create Load from file Export to View All Advanced Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions
-----------	----------	--------------	-------	--------	-----------------	---------

1
If you want to schedule a report in Coupa, click the clock icon to the right of the "View" dropdown

New Scheduled Report

Name

Data Table Invoices

View All

Recipients

Send Report Weekly

Sun Mon Tue Wed Thu Fri
Sat

Run Window Between 22:00CDT and 01:00CDT

Exact email time will depend on job queue activity.

Send As

Html Report 
Csv Report
XLSX Report
Pdf Report

Do Not Send Empty Reports

Cancel Save

2
Enter recipient list

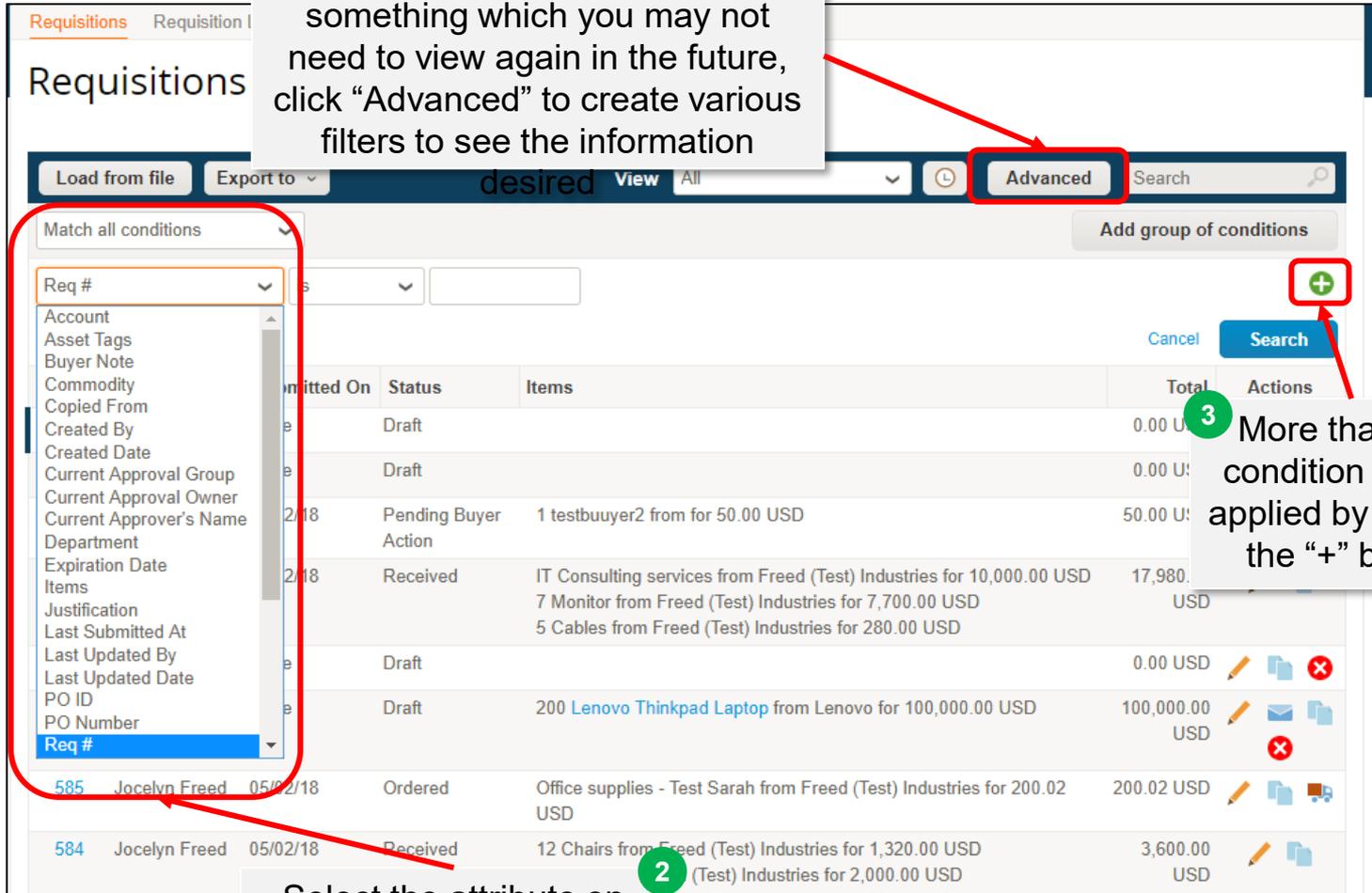
3
Enter frequency of report distribution

4
Select the format of the report to be distributed

Reporting in Coupa

Quick Reporting using the "Advanced" filtering feature

1 If you want to quickly report on something which you may not need to view again in the future, click "Advanced" to create various filters to see the information



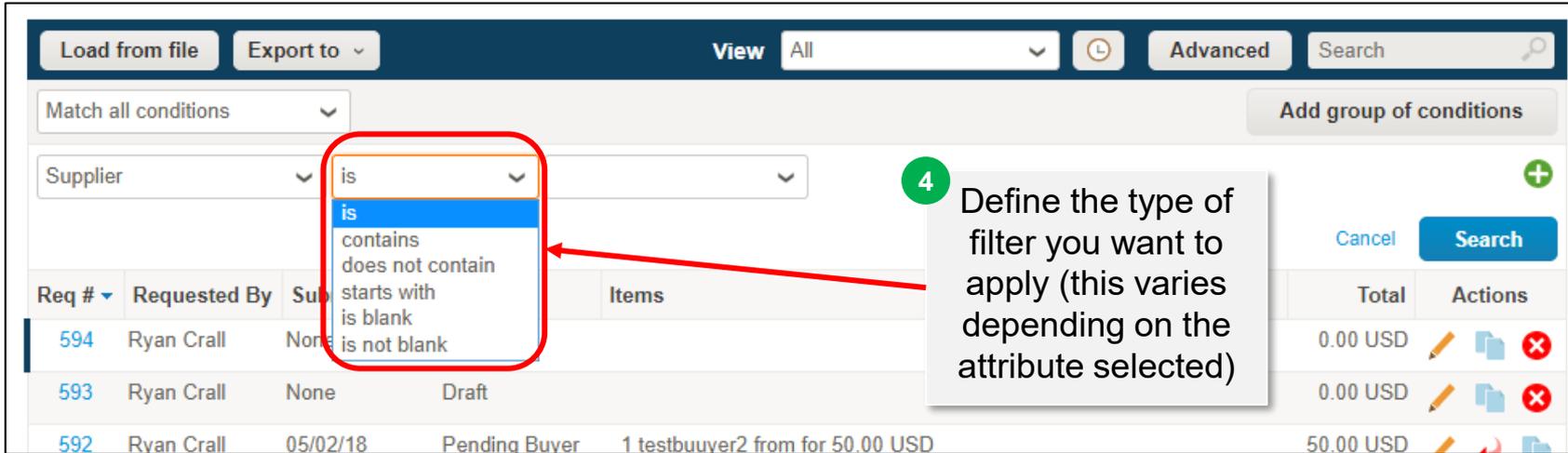
3 More than one condition can be applied by clicking the "+" button

Req #	Submitted On	Status	Items	Total	Actions
		Draft		0.00 USD	
		Draft		0.00 USD	
2/18		Pending Buyer Action	1 testbuyer2 from for 50.00 USD	50.00 USD	
2/18		Received	IT Consulting services from Freed (Test) Industries for 10,000.00 USD 7 Monitor from Freed (Test) Industries for 7,700.00 USD 5 Cables from Freed (Test) Industries for 280.00 USD	17,980.00 USD	
		Draft		0.00 USD	
		Draft	200 Lenovo Thinkpad Laptop from Lenovo for 100,000.00 USD	100,000.00 USD	
585	Jocelyn Freed 05/02/18	Ordered	Office supplies - Test Sarah from Freed (Test) Industries for 200.02 USD	200.02 USD	
584	Jocelyn Freed 05/02/18	Received	12 Chairs from Freed (Test) Industries for 1,320.00 USD (Test) Industries for 2,000.00 USD	3,600.00 USD	

2 Select the attribute on which you want to define criteria

Reporting in Coupa

Quick Reporting using the "Advanced" filtering feature – Cont'd



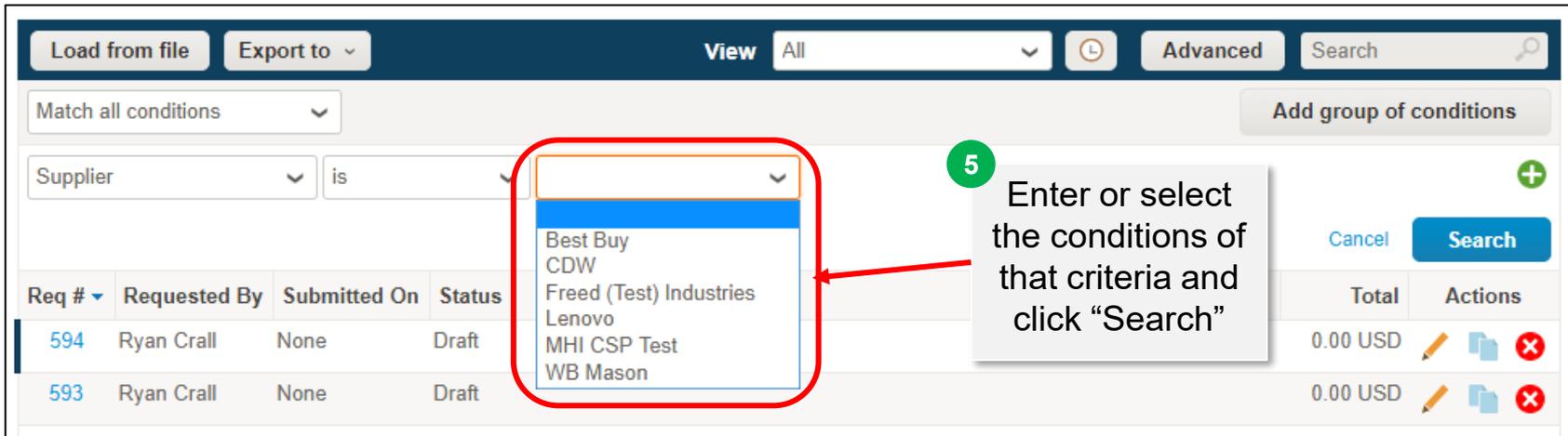
4 Define the type of filter you want to apply (this varies depending on the attribute selected)

Match all conditions

Supplier is

- is
- contains
- does not contain
- starts with
- is blank
- is not blank

Req #	Requested By	Submitted On	Status	Items	Total	Actions
594	Ryan Crall	None			0.00 USD	
593	Ryan Crall	None	Draft		0.00 USD	
592	Ryan Crall	05/02/18	Pending Buyer	1 testbuuver2 from for 50.00 USD	50.00 USD	



5 Enter or select the conditions of that criteria and click "Search"

Match all conditions

Supplier is

- Best Buy
- CDW
- Freed (Test) Industries
- Lenovo
- MHI CSP Test
- WB Mason

Req #	Requested By	Submitted On	Status	Total	Actions
594	Ryan Crall	None	Draft	0.00 USD	
593	Ryan Crall	None	Draft	0.00 USD	

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Set Preferences & Settings (notifications)

1. On the home page, hover over your name in the top right corner of the page and click “Settings”



2. This will bring up the “Settings” page, which includes notifications. Click the “Notification” tab to bring up the page on which you can set your notifications

Settings

[General](#) [Address Book](#) [Content](#) [Delegates](#) [Billing Accounts](#) [Reports](#) [Notifications](#)

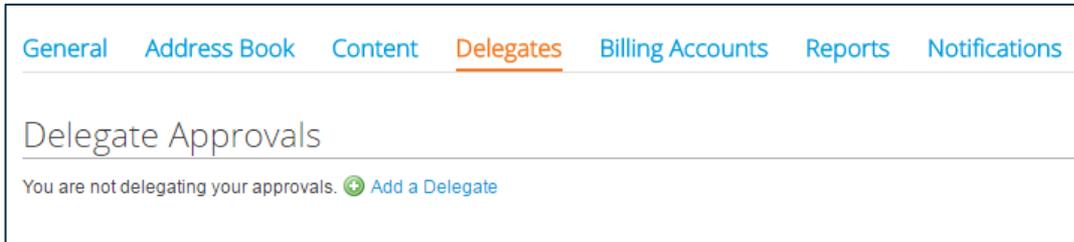
Choose the types of actions that you want to receive notifications for, either by email, in your To Do List, or both.

Platform

<input type="checkbox"/> Online	<input type="checkbox"/> Email	
<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	Someone makes a comment on something
<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	Document mentions
<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	My approval is needed

Set Preferences & Settings (delegates)

1. Coupa allows users to set up delegate approvers to approve on their behalf. To set up a delegate, click the “Delegates” tab

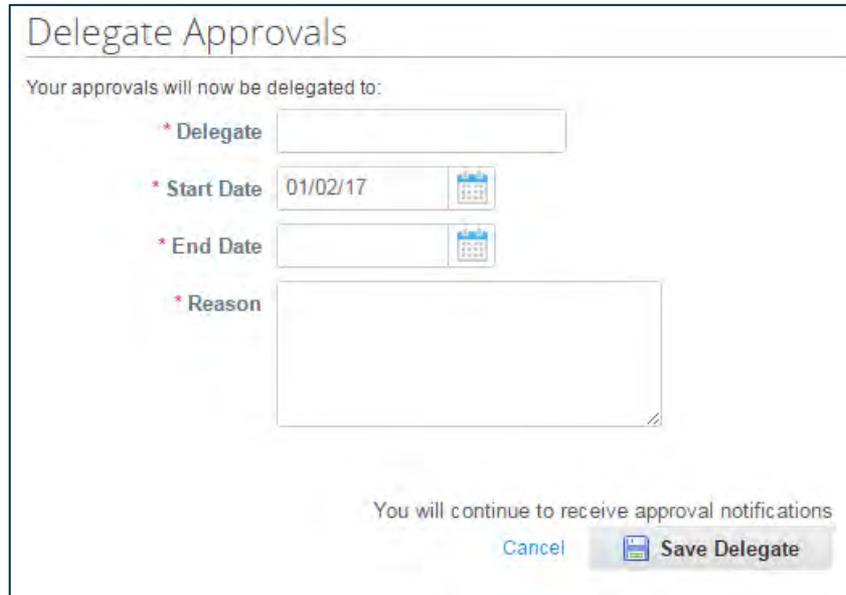


General Address Book Content **Delegates** Billing Accounts Reports Notifications

Delegate Approvals

You are not delegating your approvals. [Add a Delegate](#)

2. This will bring up the “Delegate Approvals” page, where the delegate can be specified, along with the time period and reason for delegation of approval



Delegate Approvals

Your approvals will now be delegated to:

* Delegate

* Start Date 01/02/17

* End Date

* Reason

You will continue to receive approval notifications

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- Users with the Accounts Payable (MHI) and Accounts Payable Supervisor (MHI) Role can refer to the Accounts Payable manual.
- Accounts Payable users can create invoices on Coupa in instances where suppliers do not send invoices to Coupa via cXML, CSP or SAN.
- Credit Notes can also be created if not received by the supplier
- Accounts payable users can view invoices and their status and can perform actions for on Hold invoices, void receipts or dispute invoices.

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Question	Answer
What is a Procure To Pay solution?	A Procure-To-Pay system is a fully integrated solution designed to support an end-to-end process that begins with goods and services requisitioning and ends with ready-to-pay files for upload into an accounts payable system.
What is changing?	We are optimizing our current systems and processes to minimize inefficiencies and adopt newer, more user-friendly technology with mobile functionality for indirect spend. This will change how we interact with our external Suppliers, from onboarding and buying to payment for indirect spend. See next two slides for further details.
Why are we making this change?	Coupa will allow to be more agile and more efficient in our purchasing process, as we move towards a shared services organization to manage indirect spend. For you, it should mean an easier and more efficient tool to support your business. This change will help to streamline processes and improve business efficiency for our company from Procurement to Accounts Payable
How do I know if I should use Coupa for the good/service that I am requesting?	Any indirect good or service should be requested through Coupa.
The approval chain on my requisition has an approval step called "Pending Buyer Action" – what does this mean?	<p>"Pending Buyer Action" is a status that occurs when the following fields on a request are not populated:</p> <ul style="list-style-type: none"> •Supplier •Shipping Address (will default for each user) •Billing Information (will default for each user) <p>NOTE: When a request is "Pending Buyer Action", this simply means that Coupa has sent the request to Procurement for review of missing information. Once the missing information is completed, the "Pending Buyer Action" approval step will be removed.</p>
How do I determine why certain approvers are added to the approval chain?	Typically, the approvers added to your approval chain will be the people in your management hierarchy (i.e. your manager, your manager's manager, and so on). However, Coupa will know to bring in other approvers depending on what the purchase request is for (e.g. MHIE IT for certain IT commodities). If a user hovers over an approver in the approval chain with his/her mouse, an explanation of why the approver was added to the approval chain will be visible.

Requisition Creation

- All indirect purchases require a requisition in Coupa
- Requisitions can be submitted through catalogs, web forms or free form requests
- Accounting information will be included on the requisition
 - Information on the requisition will default based on the user record (such as Company Code and Cost Center)
 - Billing information can be edited by the requester as needed and can be split at the line level.

Requisition Approval

- Requisition approval workflow will be automated
- All requisitions will be routed through managerial hierarchy for approval
- Additional commodity-driven approvals are required for some IT & HR commodities
- Approvers will receive notifications that they need to approve via email and in Coupa
- Approvals can be completed via email or on a mobile device, in addition to the Coupa site

PO Processing

- All approvals happen on the requisition – there is no additional action needed or separate approval on the PO in Coupa. Once a requisition is fully approved, it automatically turns into a PO and is sent to the supplier
- Accounts Payable users will resolve all PO's with missing information before they are sent to the supplier

Receiving

- Receiving will be required for all goods
- Receiving can be done by the requester or a central receiving group in Coupa
- Services will be received through a “service validation” approval once the invoice is received

Invoice Data Capture

- All invoices with a Coupa PO must be sent to MHI electronically through Coupa or to a Coupa linked email inbox
- Non-PO invoices processed in Coupa must be sent to affiliate-specific Coupa email inbox (SAP PO invoices & invoices from suppliers not in Coupa will continue to be processed in SAP)
- A requester will need to be identified on non PO invoices to ensure proper approval routing

Matching Process

- Invoices that match do not require additional approvals
- POs are set up as “not to exceed” (invoices will match a PO as long as the total PO line amount has not been exceeded)
- Tolerances are standardized across affiliates

Invoice Approvals

- Invoice approval workflow will be automated
- Non-PO invoices will go through the same approval process as requisitions (i.e. managerial hierarchy, commodity approval etc.)
- Invoice approvals will be escalated to approver’s manager after 14 days of no action
- Approvers will receive notifications that they need to approve via email and in Coupa
- Approvals can be completed via email or on a mobile device, in addition to the Coupa site

Invoice Exception Handling

- Variances (price, quantity, shipping/tax) exceptions will route to the requester followed by his/her managerial hierarchy for approval
- Approvals driven by variances will be automated