



Supplier Resources

Coupa Supplier Portal Training

June, 2019



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Introducing Coupa



What is Coupa

CNA has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic transactions.

- Coupa is a leading E-Procurement platform, connecting buyers with their suppliers
- “Coupa is an internet based solution capable of accommodating a variety of different systems” (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by CNA to request indirect materials and services, create and communicate purchase orders, and to receive invoices from suppliers
- The Coupa Supplier Portal (CSP) is free, there is no cost for suppliers



How Will You Benefit?

By working with CNA electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with CNA.

- Efficient Invoice Processing (PO Flip)
- Instant visibility into Purchase Order and Invoice Status
- Reduced Manual Paper Transaction Processing



Connecting to the Coupa Supplier Portal (CSP)

Connection to CNA via Coupa

It is imperative that all suppliers connect to the Coupa platform to transact with CNA successfully. Each of the below steps must happen before a supplier can properly interact with CNA:




Coupa Supplier Portal (CSP) Introduction

The below introduction letter comes from Coupa for Suppliers.

Action Required from Continental Casualty Company - Click Below to Join Coupa

Powered by



Hello CNA Test Supplier,

Continental Casualty Company wants to connect with you on Coupa. Once registered you can do things with Continental Casualty Company (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Coupa's Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!


Reena Mallavaram
Continental Casualty Company

[Join Coupa](#) [Forward This](#)

One System, Two Interaction Methods

As a supplier, you have two ways that you can electronically interact with CNA.

Via Email Flip...



Continental Casualty Company Purchase Order #CO00000221

Create Invoice

Acknowledge PO

Add Comment


Login



Continental Casualty Company
PURCHASE ORDER

CNA Test Supplier
Attn: CNA Test Supplier
cnatestsupplier+test@gmail.com
PO NUMBER
CO00000221
DATE
06/13/19
PAYMENT TERMS

Via the CSP

 CNA TEST | NOTIFICATIONS | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Add-ons Admin


Orders Order Lines

Select Customer Continental Casualty Company

Configure PO Delivery

Purchase Order #CO00000221

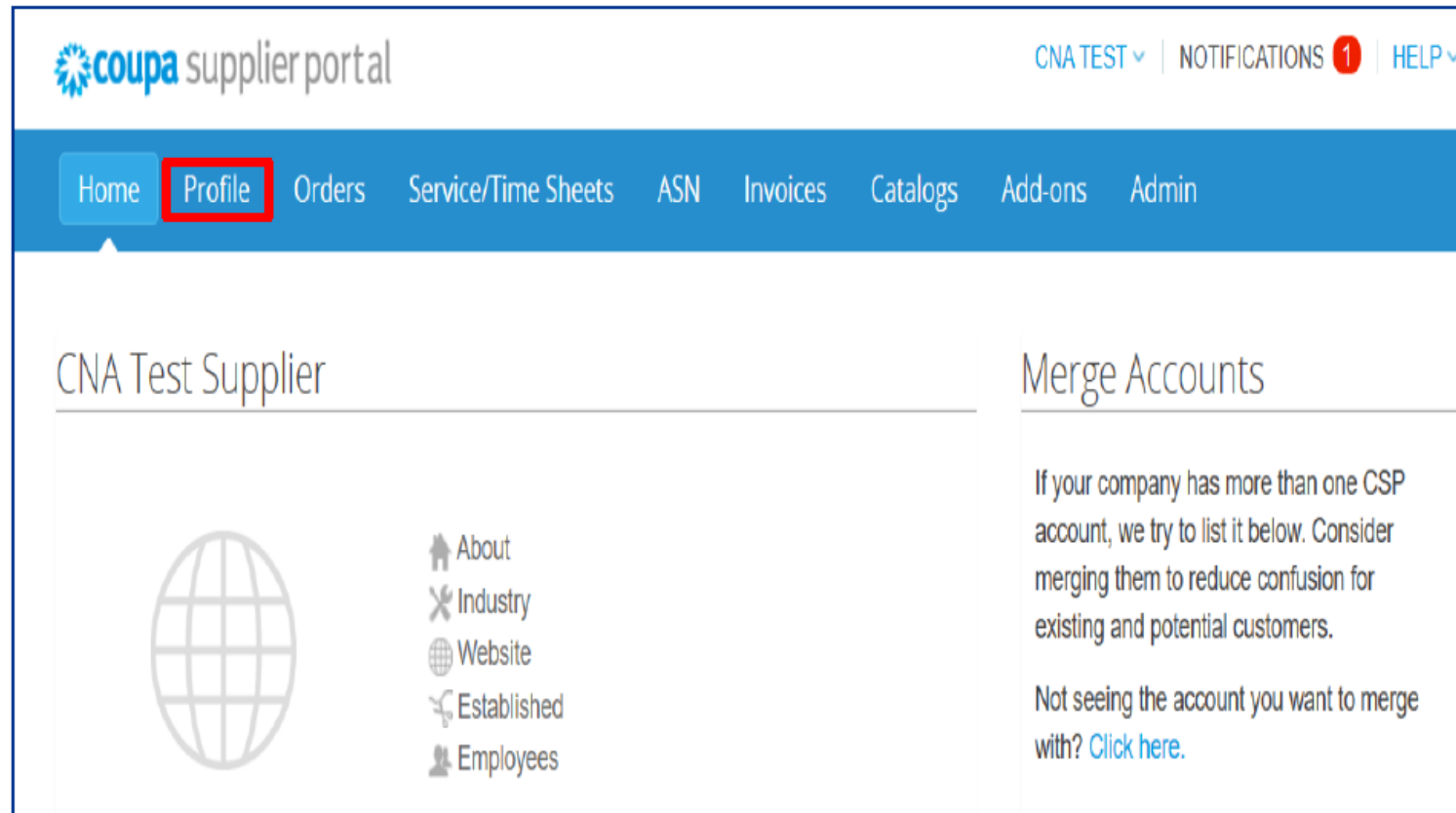
Status Issued - Sent via Email
Order Date 06/13/19
Revision Date 06/13/19
Requestor Shagun Chaudhry
Email shagunchaudhry1@jpmorg.com
Payment Term None
Inside Delivery None
Address
Attachments None
Acknowledged ☐

 Shipping
Ship-To Address 2 Chase Corporate Drive
Suite 200
Birmingham, AL 35244
United States
Location Code ALX1
Attn: Shagun Chaudhry
Terms None

Update Profile Settings

Update Profile Settings

- Available once you click the emailed link and sign-up for the CSP.
- Click **Profile** from the Menu Bar.



Update Profile Settings

Edit Company Info

To start, complete your Public Profile:

- Click Profile from the Menu Bar.
- Click Edit Profile.
- Enter your company information into the applicable fields.
- Required fields are marked with an asterisk.
- Click Save when finished.

Note: When enabled for a given customer, a user can access all POs and create invoices for that customer.

Add Remit To Address

To add new Remit To addresses:

- Click the Admin from the Menu Bar and then the E-Invoicing Setup tab at the left.
- Click Add Legal Entity button to get started.

Add Users

Allow additional users access to your supplier account to perform all tasks.

- Click the Admin from the Menu Bar and then the User tab at the left and click Invite User.
- Enter the employee's email address in the text box provided and click Send Invitation.
- You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
- You can delete a user by clicking the Delete icon.

Supplier Actionable Notification (Email Flip)

Transactions in Coupa Via Email

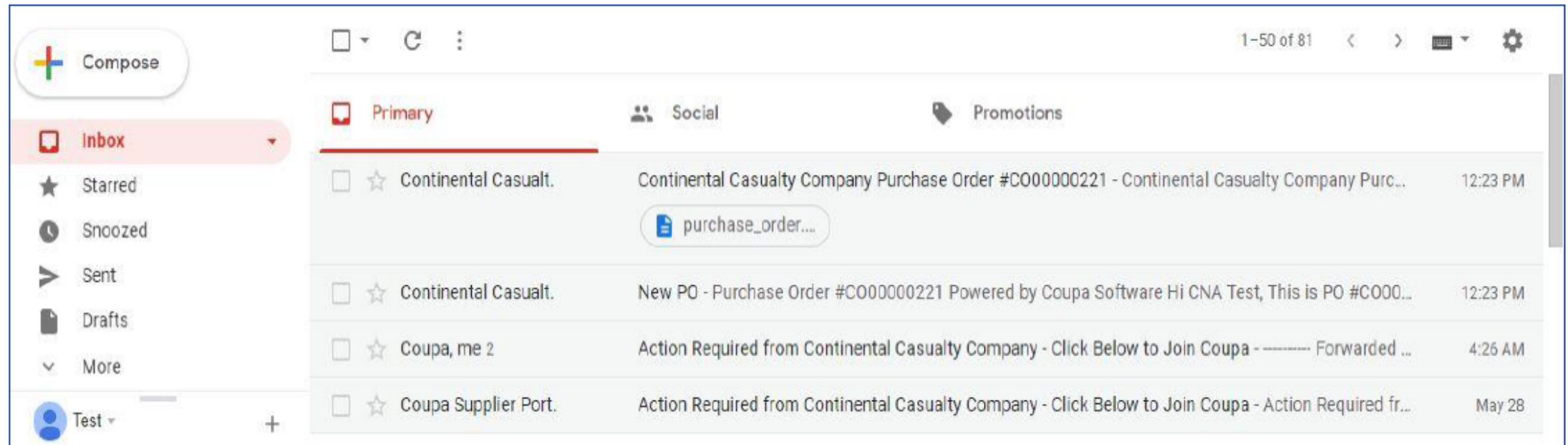
- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and invoice against those orders via Email
- As the Supplier you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons so depending on what you click you will be able to Create Invoice, Acknowledge PO or Add Comment to the PO
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



Receive and View Orders Via Email

Receive a Purchase Order via Email


- If the Supplier email address is added in the CNA systems, the PO will be automatically emailed directly to you
- Purchase Orders will show up as **Coupa Notifications** in your mailbox
 - POs will be issued to a PO email address confirmed by the supplier and not to the primary contact email address (unless they are identical). Contact suppliercommunications@cna.com if unsure which email you currently have on file or need to update



Create Invoices Via Email

Create Invoices via Email

To flip this PO into an invoice, click **Create Invoice**.




Continental Casualty Company Purchase Order #CO00000221

Create Invoice

Acknowledge PO

Add Comment

Login



Continental Casualty Company

PURCHASE ORDER

CNA Test Supplier

Attn: CNA Test Supplier

cnatestsupplier+test@gmail.com

PO NUMBER

CO00000221

DATE

06/13/19

PAYMENT TERMS

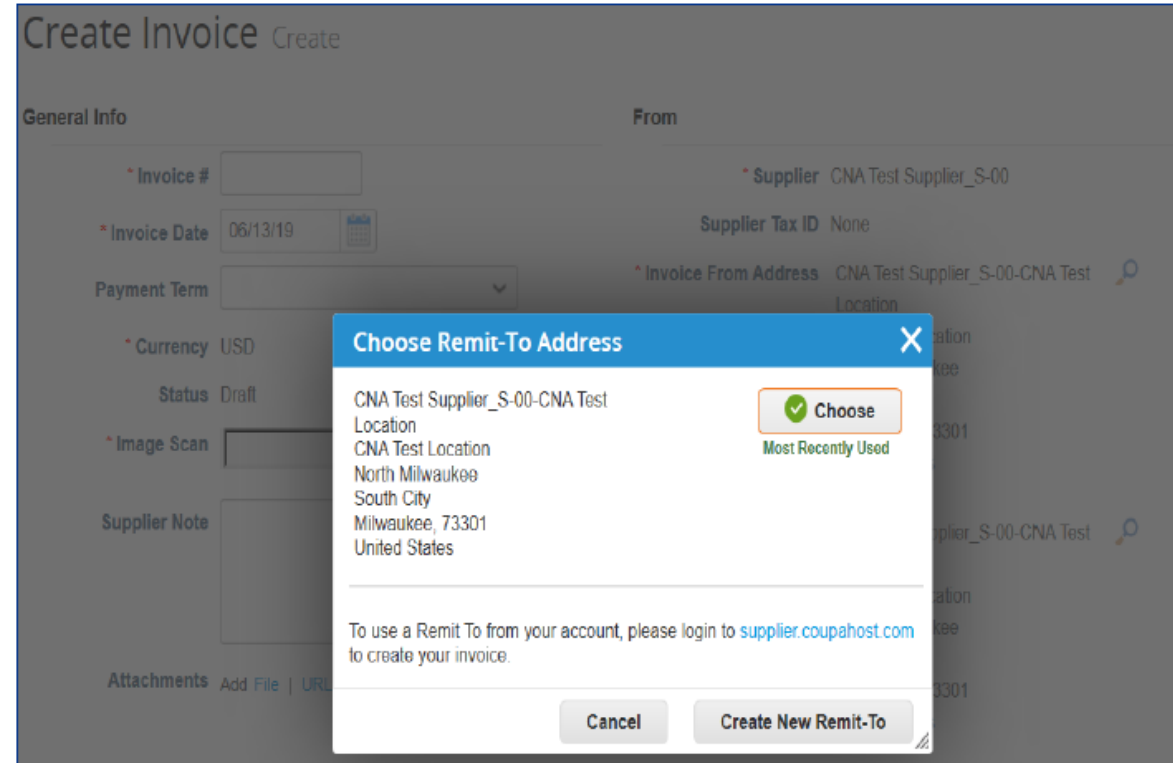


Create Invoices via Email

The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

Note: If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. Or if there is no Remit-To address stored, Coupa will ask you to create one.

If the correct remit-to address does not appear, click **Create New Remit-To**.



The screenshot shows the 'Create Invoice' page in Coupa. The background is dimmed, showing fields for 'General Info' (Invoice #, Invoice Date, Payment Term, Currency, Status, Image Scan, Supplier Note) and 'From' (Supplier, Supplier Tax ID, Invoice From Address, Location). A modal window titled 'Choose Remit-To Address' is open in the foreground. It lists the following address: 'CNA Test Supplier_S-00-CNA Test Location', 'CNA Test Location', 'North Milwaukee', 'South City', 'Milwaukee, 73301', 'United States'. To the right of the address is a green checkmark icon and the text 'Choose' and 'Most Recently Used'. At the bottom of the modal are two buttons: 'Cancel' and 'Create New Remit-To'. Below the address list, there is a note: 'To use a Remit To from your account, please login to supplier.coupahost.com to create your invoice.'

Note: If you create a new address, the invoice will be put “on hold” as the new remit-to address will need to be approved by the CNA AP team.

Create Invoices via Email

On the **Create Invoice** screen, input the invoice number into the **Invoice #** field.

**All required fields are indicated by an asterisk*

CNA

Sign Out

Create Invoice

Create

General Info

* Invoice #

* Invoice Date

06/13/19

Payment Term

* Currency

USD

Status

Draft

* Image Scan

Browse...

Supplier Note

Attachments

Add

File

|

URL

|

Text

From

* Supplier

CNA Test Supplier_S-00

Supplier Tax ID

None

* Invoice From Address

CNA Test Supplier_S-00-CNA Test

Location

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Remit-To Address

CNA Test Supplier_S-00-CNA Test

Location

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

Create Invoices via Email

Scroll down to the **Lines** section and ensure all details are accurate, specifically the Price and the Quantity.

- Enter any shipping and handling information
- If applicable, add any tax in the proper section by one of the following methods:
 - Select a tax code from the Tax Code dropdown and click Calculate
 - Manually enter a tax percentage
 - Manually enter a tax amount (\$)
- Enter any comments for CNA and then click Add Comment.

Add Line

Totals & Taxes

Lines Net Total	700.00
<hr/>	
Shipping	<input type="text"/>
<hr/>	
Handling	<input type="text"/>
<hr/>	
Tax	<div><div><div></div></div><div>0 %</div><div>0.00</div></div>
<hr/>	
Total Tax	0.00
Net Total	700.00
Total	700.00

Delete

Cancel

Save as Draft

Calculate

Submit

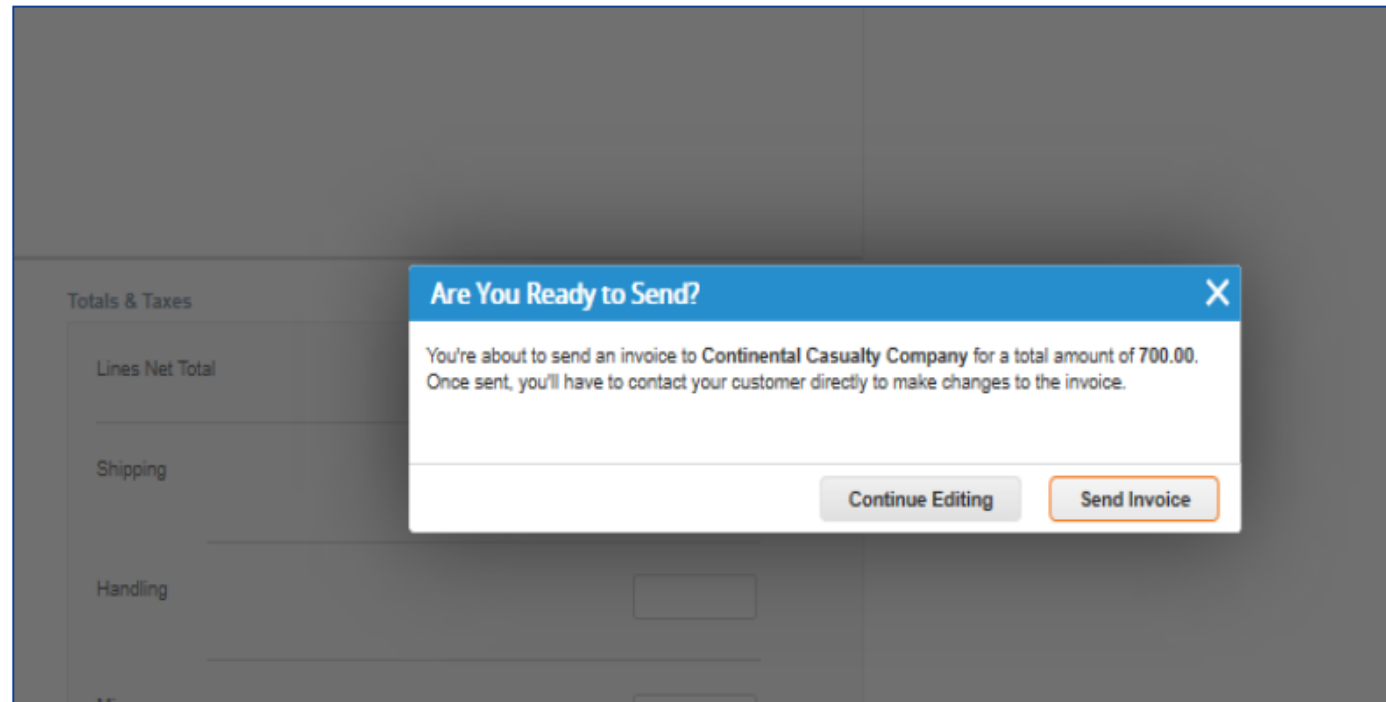
Comments

Add Comment



Create Invoices via Email


After you click Submit, a pop up appears to confirm if you are ready to send the invoice. Click **Send Invoice** to complete the process. Note that once submitted, the invoice cannot be changed.




Coupa Supplier Portal (CSP)

Email and CSP are Linked

- You will be notified of the status of your Purchase Order or Invoice via email.
- You can click **View Online** in the acknowledgement email to check the invoice status.



Invoice Invoice12345 is Approved to Pay by Continental Casualty Company

Powered by 

Good News,

Your Invoice Invoice12345 has been approved to pay by your customer, Continental Casualty Company. No further action is required but you can click below for real time status or additional details.

If your customer's process is to mark the Invoice as 'Paid' in Coupa, you will get a notification at that time with instructions for payment details.

If you have any questions you can simply contact your customer through normal channels or enter a comment on the Invoice.

Add ons Admin









Select Customer Continental Casualty Company

either through the Coupa Supplier Portal or directly from the information, including the bill-to and ship-to addresses, should

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Bill Invoice Create Credit Note

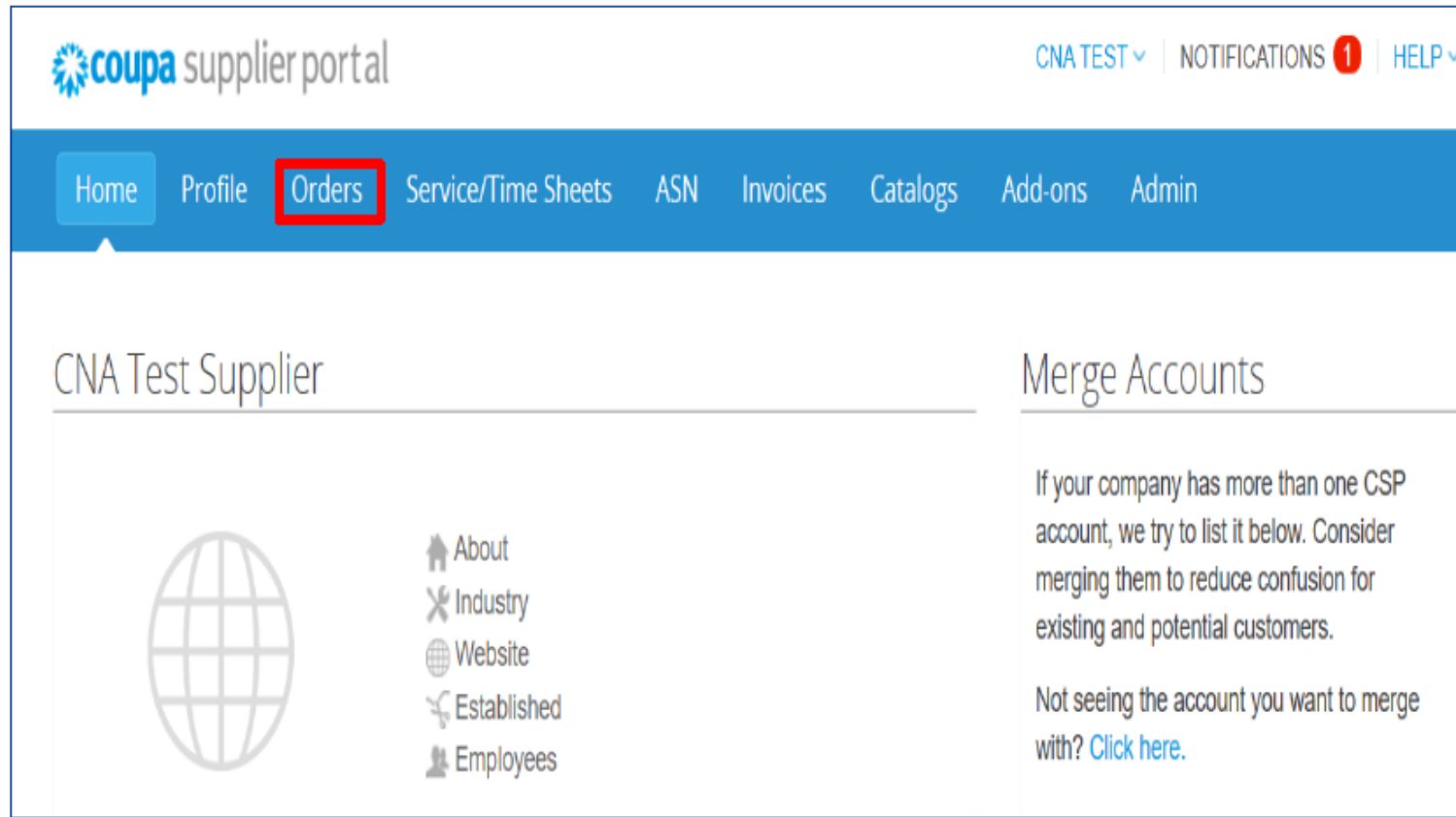
Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	06/13/19	Draft	C000000221	700.00	No	 
None	06/13/19	Draft	C000000221	700.00	No	 
Invoice12345	06/13/19	Approved	C000000221	700.00	No	
None	06/13/19	Draft	C000000221	700.00	No	 
None	06/13/19	Draft	C000000221	700.00	No	 

Receive and View Orders Via CSP

Receive & View Orders

- Regardless of the PO delivery preference set, you will have access to POs within the CSP
- Click **Orders** from the Menu Bar.



Receive & View Orders

- When the page refreshes, **select the applicable PO number** from the list of purchase orders. Or use the Search menu to locate the PO.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, 'supplier portal', and user options: 'CNA TEST', 'NOTIFICATIONS' (with a red badge), and 'HELP'. A navigation bar contains links for Home, Profile, Orders (highlighted), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below this, a sub-navigation bar shows 'Orders' and 'Order Lines'. The main content area features a 'Select Customer' dropdown menu set to 'Continental Casualty Company' and a 'Configure PO Delivery' button. The section is titled 'Purchase Orders'. Below the title, there is a box for 'Instructions From Customer' containing text about CNA's Terms and Conditions. A message prompts the user to 'Click the [icon] Action to Invoice from a Purchase Order'. A table lists purchase orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The first row, with PO Number 'CO00000223' highlighted by a red box, shows an 'Issued' status, order date '06/13/10', and a total of '700.00'. The second row shows PO Number 'CO00000221' with an 'Issued' status, order date '06/13/10', and a total of '700.00'. A 'View' dropdown menu is set to 'All'.

coupa supplier portal

CNA TEST | NOTIFICATIONS 2 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines

Select Customer Continental Casualty Company

Configure PO Delivery

Purchase Orders

Instructions From Customer

All purchases made by CNA (CNA Insurance Companies, and Continental Casualty Company) are subject to CNA's Terms and Conditions of Purchase in effect as of the date this purchase order or purchase request is issued to your company. CNA's Terms and Conditions of Purchase can be found on the Vendor Management page of the www.CNA.com website. If you have a contract, the Terms and Conditions of the contract will apply.

Click the [icon] Action to Invoice from a Purchase Order

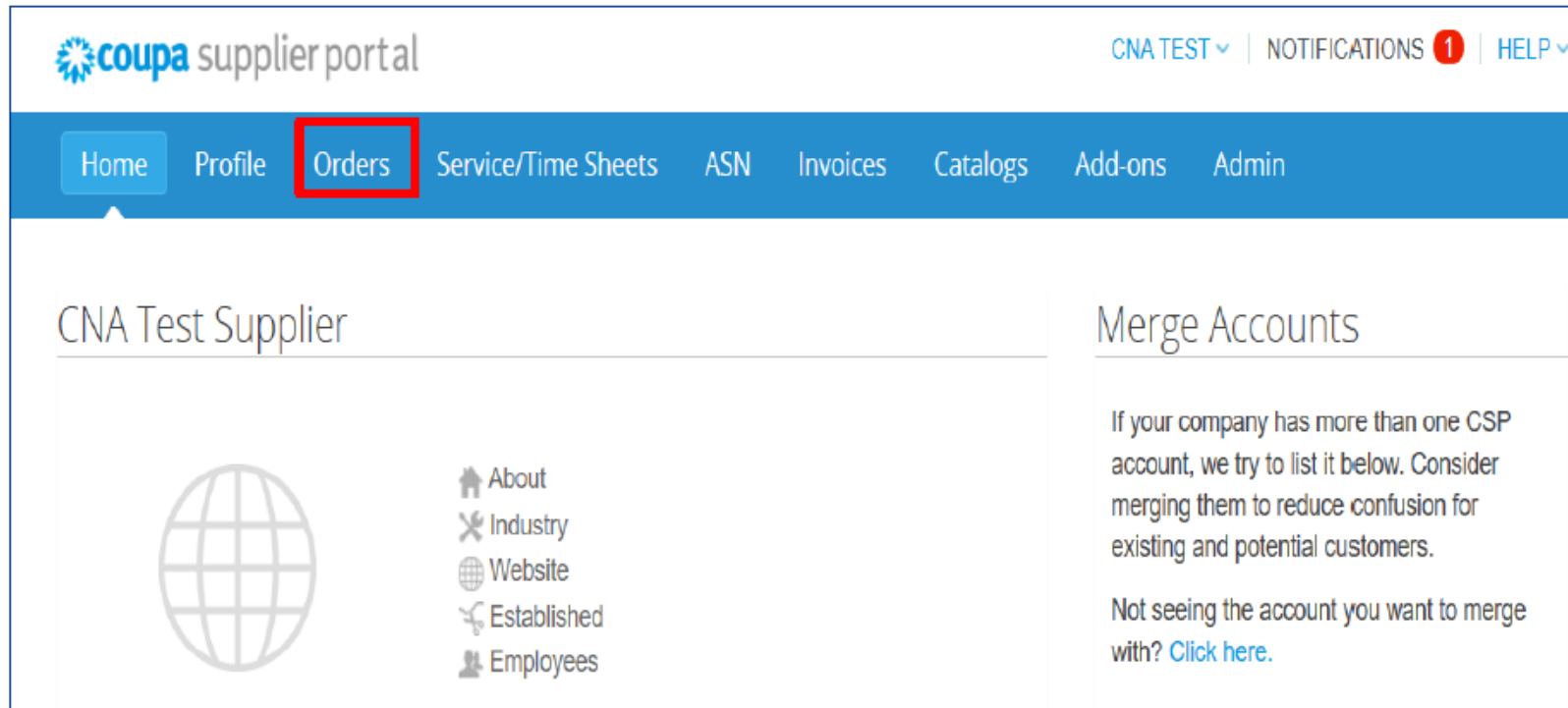
View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
CO00000223	06/13/10	Issued	None	1 Each of Desktop	No	700.00	[icon] [icon] [icon]
CO00000221	06/13/10	Issued	06/13/10	1 Each of Desktop	No	700.00	[icon] [icon] [icon]


Create Invoices Via CSP

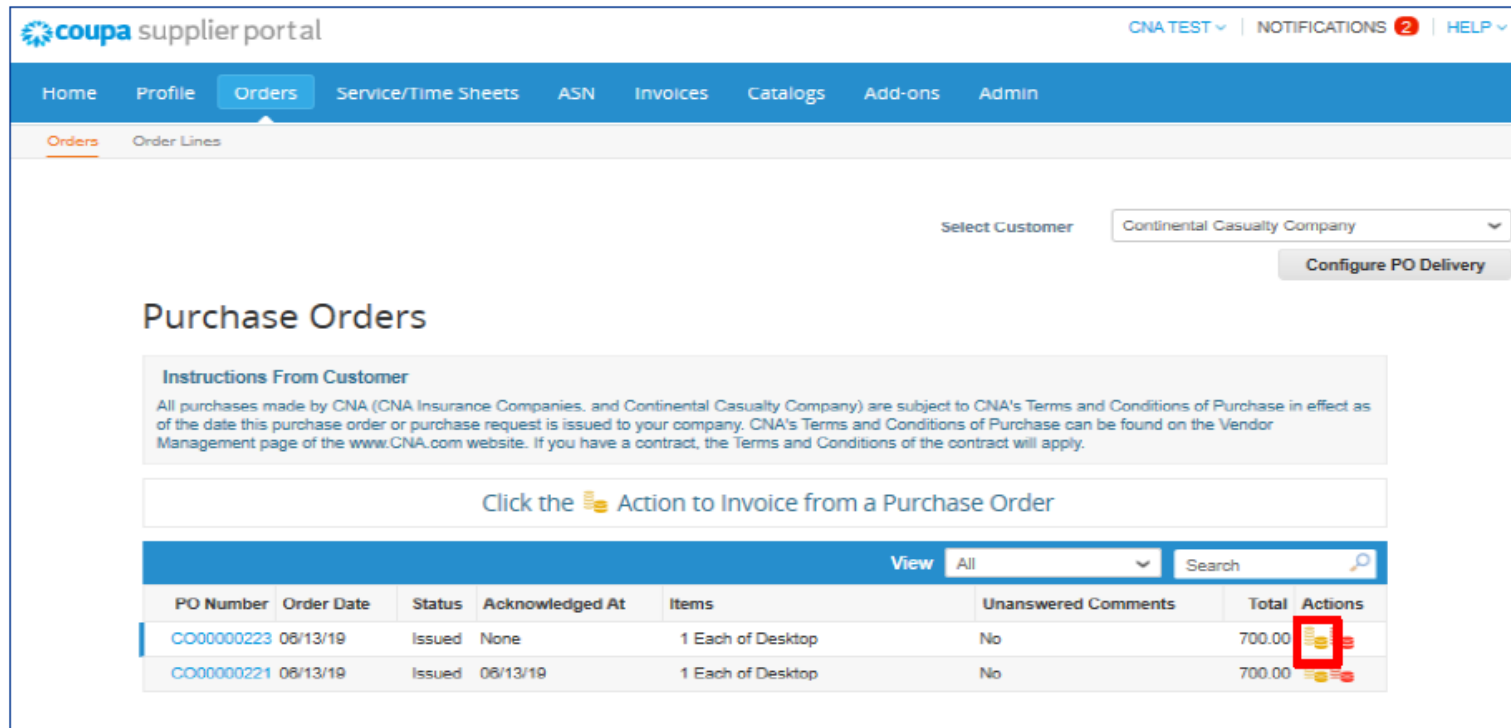
Create Invoices Via CSP

- Via the CSP you can create invoices directly from POs, often referred to as “flipping the PO”
- Click **Orders** from the Menu Bar.



Create Invoices Via CSP

- Find the PO you would like to flip into an invoice.
- Within that PO row, under the **Actions** column, select the yellow coin stack icon  to flip the PO into an invoice.



The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, 'supplier portal', and navigation links for 'CNA TEST', 'NOTIFICATIONS' (with a red badge showing '2'), and 'HELP'. Below the header is a blue navigation bar with tabs for 'Home', 'Profile', 'Orders' (selected), 'Service/TIME Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Under the 'Orders' tab, there are sub-tabs for 'Orders' and 'Order Lines'. The main content area shows a 'Select Customer' dropdown menu set to 'Continental Casualty Company' and a 'Configure PO Delivery' button. Below this is the 'Purchase Orders' section, which includes 'Instructions From Customer' and a table of purchase orders. The table has columns for 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'Unanswered Comments', 'Total', and 'Actions'. The first row (PO Number: CO00000223) is highlighted, and its 'Actions' column contains a yellow coin stack icon, which is highlighted with a red box. The second row (PO Number: CO00000221) also shows the same icon. A search bar and a 'View' dropdown menu are located above the table.

coupa supplier portal

CNA TEST | NOTIFICATIONS 2 | HELP

Home Profile **Orders** Service/TIME Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines


Select Customer Continental Casualty Company



Configure PO Delivery

Purchase Orders

Instructions From Customer

All purchases made by CNA (CNA Insurance Companies, and Continental Casualty Company) are subject to CNA's Terms and Conditions of Purchase in effect as of the date this purchase order or purchase request is issued to your company. CNA's Terms and Conditions of Purchase can be found on the Vendor Management page of the www.CNA.com website. If you have a contract, the Terms and Conditions of the contract will apply.

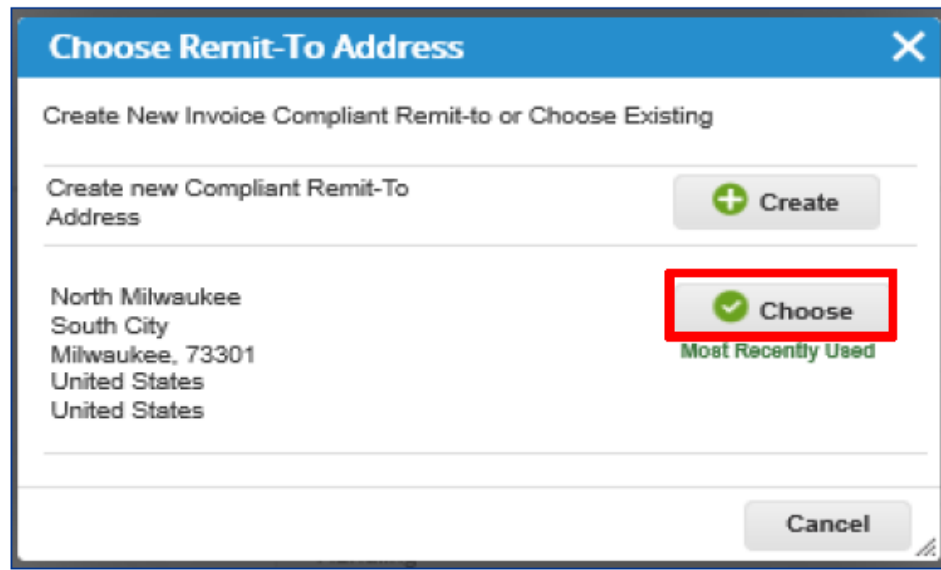
Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
CO00000223	06/13/19	Issued	None	1 Each of Desktop	No	700.00	
CO00000221	06/13/19	Issued	06/13/19	1 Each of Desktop	No	700.00	

Create Invoices Via CSP

- The page refreshes to display the create invoice screen.
- The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored, Coupa will ask you to create one.



Choose Remit-To Address X

Create New Invoice Compliant Remit-to or Choose Existing

Create new Compliant Remit-To Address + Create

North Milwaukee
South City
Milwaukee, 73301
United States
United States

✓ Choose Most Recently Used

Cancel

If the correct Remit-To Address does not appear and you would like to add that address, close the pop-up, save the invoice as a draft and then add a new Remit-To address to your profile.

Note: *If you submit an invoice with a new Remit-To address, the invoice will be put on hold until the new address is approved by the CNA AP team. When you submit the invoice, you will receive a message saying that it is on hold.*

Create Invoices Via CSP

On the **Create Invoice** screen, input the **Invoice #** and **Invoice Date**. Note that required fields are indicated with asterisks.

Create Invoice

Create

General Info

* Invoice #

Invoice1234567

✓

* Invoice Date

08/13/19

📅

Payment Term

▼

* Currency

USD

Status

Draft

* Image Scan

Choose File

KPMG_FORT...59700.pdf

Supplier Note

Attachments

Add

File

|

URL

|

Text

From

* Supplier

CNA Test Supplier_S-00

Supplier Tax ID

None

* Invoice From Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Remit-To Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

* Ship From Address

CNA Test Location

North Milwaukee

South City

Milwaukee, 73301

United States

To

Customer

Continental Casualty Company

Create Invoices Via CSP



As you scroll down the page, in the Lines section you will find more fields to input information.

For a Goods PO:

- Enter a price into the **Price** field.
- Enter the quantity in the **Quantity** field.

Lines


☐ Line Level Taxation

Type	Description	Qty	UOM	Price	
	Desktop	1	Each	700.00	700.00 

PO Line

CO00000223-1


Contract



Supplier Part Number

Billing

06920-0000125--SC090-ALX1

 Add Tag



Create Invoices Via CSP

For a Services PO:

- Enter a price in the **Price** field. Since it is a Services only PO, only the amount is required.

Lines

☐ Line Level Taxation

Type	Description	Price	
	<input type="text" value="Services"/>	<input type="text" value="900.00"/>	900.00 

PO Line


CO00000224-1


Contract

Supplier Part Number

Billing

02360-0000104--SC002-FL20

 Add Tag

 Add Line

Totals & Taxes

Create Invoices Via CSP

- Enter any shipping and handling information.
- Enter any tax information
 - If applicable, add any tax in the proper section by one of the following methods:
 - Manually enter a **tax percentage**.
 - Manually enter a **tax amount** (\$)

Totals & Taxes

Lines Net Total	900.00
<hr/>	
Shipping	<input type="text"/>
<hr/>	
Handling	<input type="text"/>
<hr/>	
Tax	<input type="text"/> <input type="text"/> % <input type="text"/>
<hr/>	
Total Tax	18.00
Net Total	900.00
Total	918.00



Delete

Cancel

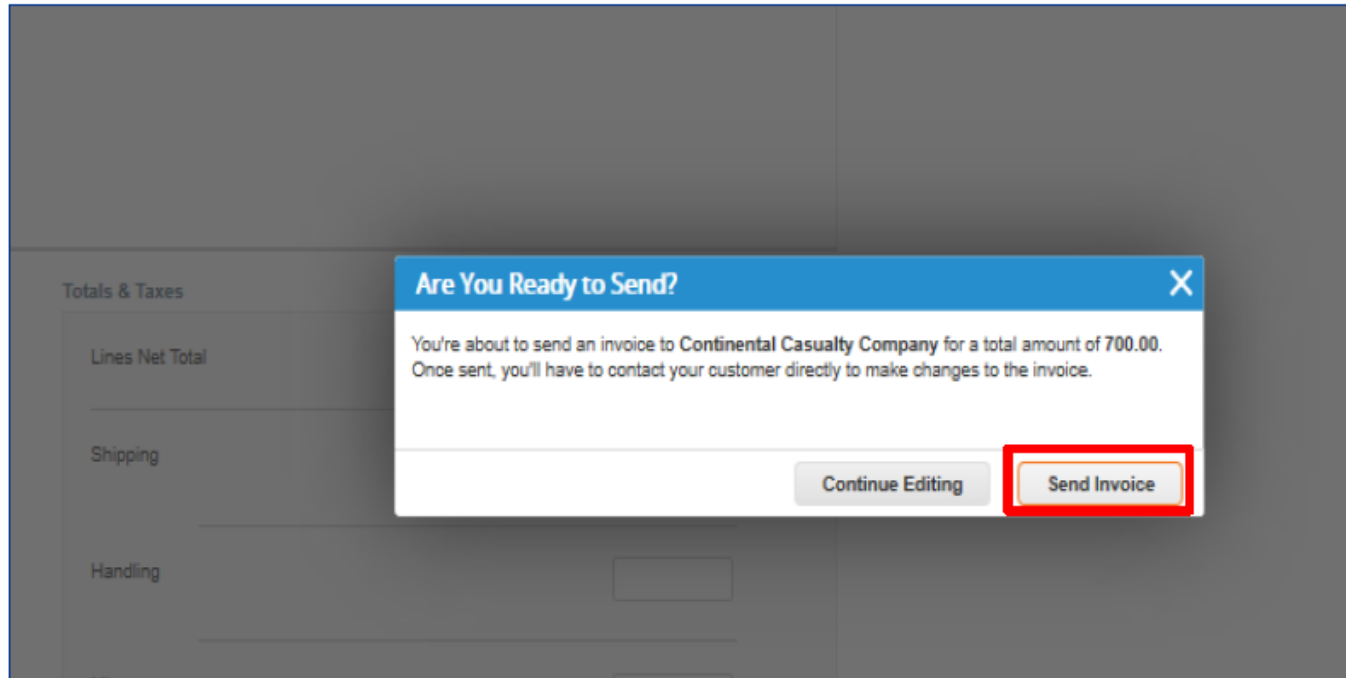
Save as Draft

Calculate

Submit










Create Invoices Via CSP

- Before submitting, a pop-up window will appear to confirm.
 - Click **Send Invoice** when you are ready to submit.
 - Any invoice changes after invoice submission must be made directly through CNA.
 - If you wish to go back to edit, click **Continue Editing**.



Create Invoices Via CSP

- After submitting, the page will refresh to display the invoice is pending approval.
 - Note: If you submitted the invoice with a new Remit-To address, the status will display as 'On Hold.'
- To check the status of the invoice, from the home page, click the invoice hyperlink in the menu bar.

Export to 		View All 					Search 
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions	
Invoice123456	06/13/19	Pending Approval	CO00000223	700.00	No		
None	06/13/19	Draft	CO00000221	700.00	No	 	
None	06/13/19	Draft	CO00000221	700.00	No	 	
Invoice12345	06/13/19	Approved	CO00000221	700.00	No		
None	06/13/19	Draft	CO00000221	700.00	No	 	

- After the invoice is approved and matched with the PO, the invoice will be paid according to CNA's standard payment terms, or to the payment terms contractually agreed upon between CNA and the supplier. Payment details will be reflected in Coupa and the CSP.

Invoice Status

- A supplier can view the following invoice statuses in the CSP:
 - **Draft** – Draft invoice that has not yet been submitted
 - **Pending Approval** – Invoice undergoing any CNA-internal process to allow final approval.
 - **Disputed** – Invoice that is currently disputed by the business or AP
 - **Approved** – Invoice that is approved and ready for payment as per the pay terms or immediately if overdue
 - **Voided** - Invoice voided after CNA fully approved and processed



Viewing and Managing Catalogs

Viewing/Managing Catalogs

After initial setup with CNA, you can manage catalog update requests from the CSP

- Select Catalogs from the top menu bar to view your CNA catalog information and available actions:
 - **Create:** Create an updated catalog request
 - **Export to:** Export catalog details to CSV or Excel
- Click on the **Catalog Name** to view the list of individual catalog items

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, **Catalogs** (highlighted), Add-ons, and Admin. On the right, there are links for CNA TEST, NOTIFICATIONS (3), and HELP. Below the navigation bar, a 'Select Customer' dropdown is set to 'Continental Casualty Company', with a 'Configure Punchout' button next to it. The main section is titled 'Catalogs' and contains a table with columns: Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. The first row of the table is 'CNA Test Supplier_S-00 Catalog 1', which is highlighted with a red box. Below the table, it says 'Per page 15 | 45 | 90'.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
CNA Test Supplier_S-00 Catalog 1	08/13/19	None	08/13/19	08/27/19	Draft	No		 

Viewing/Managing Catalogs

- Click on the **Item Name** in your catalog to view the detailed item page
- You can either bulk upload catalog item updates via **Load from File** or individually via **Create**
- Click **Submit to buyer** when catalog updates, additions, or changes are complete to automatically send for CNA Review

5 Items Changed (0 unchanged)

0 ↑
Price Increase

0 ↓
Price Decrease

0
Other Fields Updated

5
New Items

0
Deactivated Items

[Save](#) [Submit to buyer](#)

Items Included in Catalog

[Create](#) [Load from file](#) [Export to](#) [View](#) [All](#) [Advanced](#)

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Red Stamp Ink Pad #3 - 4 1/4" x 7 1/2" - Use with Rubber Stamp	S-0000000535	New	7.30		USD		
Photocopy paper	12345	New	12.00		USD		
Installation services	123567	New	5,000.00		USD		
Laptop charger	345677	New	12.00		USD		
HP Inkjet Cartridge	987123	New	50.00		USD		

Per page: 15 | 45 | 90

CNA Test Supplier_S-00 Catalog 1 [Edit](#) [Back](#)

Customer: Continental Casualty Company

* Catalog Name:

Status: Draft

Start Date: date when catalog prices become effective

Expiration Date: date when catalog prices become expired

Currency: USD

4 Items Changed (0 unchanged)

0 ↑
Price Increase

0 ↓
Price Decrease

0
Other Fields Updated

4
New Items

0
Deactivated Items

[Save](#) [Submit to buyer](#)

Key Points

Key Points

- Coupa centralizes CNA's procure to pay processes and practices and provides our strategic supplier relationships several benefits
 - You are able to view invoice payment status online
- Suppliers have expanded online capabilities: manage catalogs and pricing, receive/acknowledge purchase orders, send invoices online, create hosted catalogs (if enabled on CSP), and check the status of their payment
- Supplier expectations: Working online (no paper) and ensuring a PO is referenced on each invoice
 - Invoices are automatically paid (according to established payment terms) when the purchase order amount equals the amount received and invoice received; no further action required by CNA colleagues (ensuring timely payment).

Thank You

Please direct any questions to: suppliers@cna.com



Legal Disclaimer

One or more of the CNA companies provide the products and/or services described. The information is intended to present a general overview for illustrative purposes only. It is not intended to constitute a binding contract. Please remember that only the relevant insurance policy can provide the actual terms, coverages, amounts, conditions and exclusions for an insured. All products and services may not be available in all states and may be subject to change without notice. "CNA" is a registered trademark of CNA Financial Corporation. Certain CNA Financial Corporation subsidiaries use the "CNA" service mark in connection with insurance underwriting and claims activities. Copyright © 2021 CNA. All rights reserved.