



Supplier Resources

Set-up and Settings

June, 2019



Introducing Coupa

CNA

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](#)

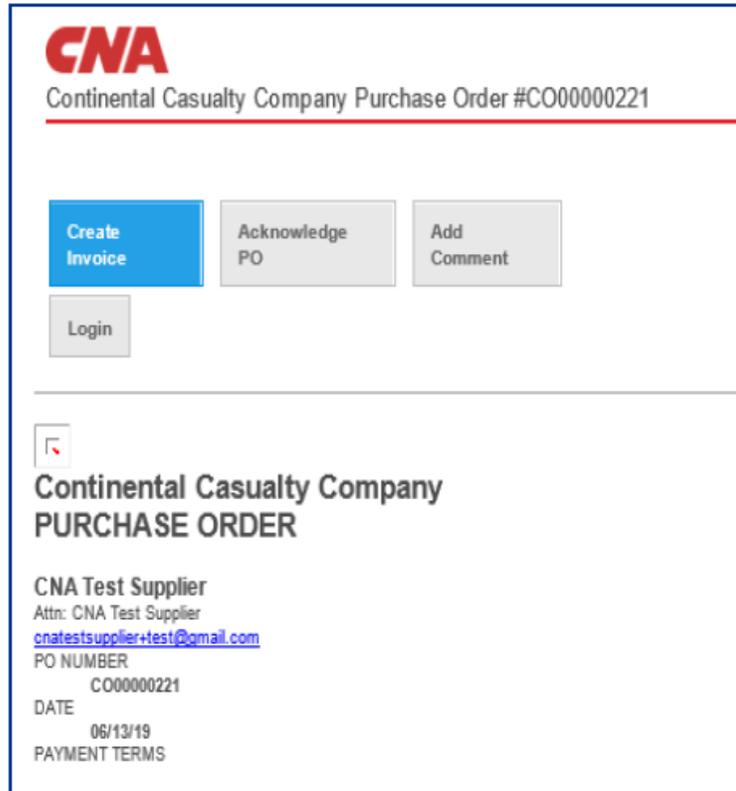
One System, Two Interaction Methods

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

Note:

CNA is listed as **Continental Casualty Company** in the customer list of the Coupa Supplier Portal.

Via Email Flip...



CNA
Continental Casualty Company Purchase Order #CO00000221

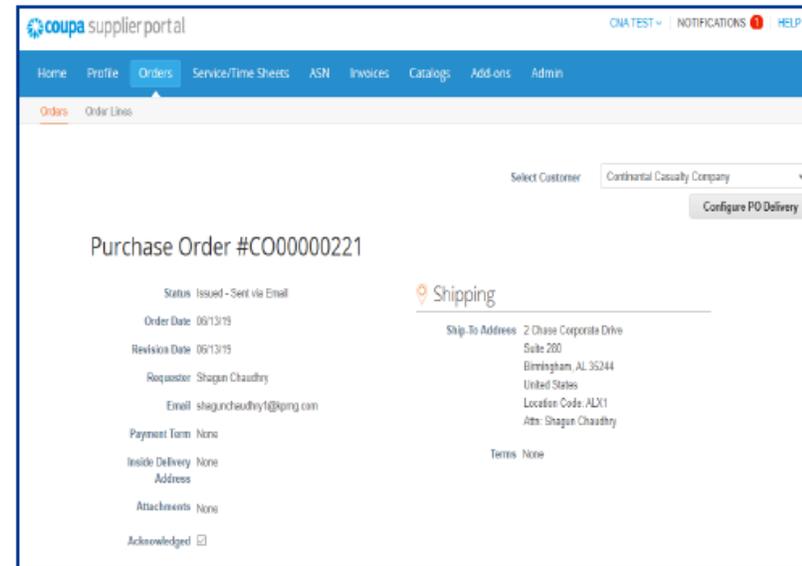
[Create Invoice](#) [Acknowledge PO](#) [Add Comment](#)

[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



coupa supplier portal 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@ppmg.com
Payment Term: None
Invoice Delivery: None
Address
Attachments: None
Acknowledged:

Shipping

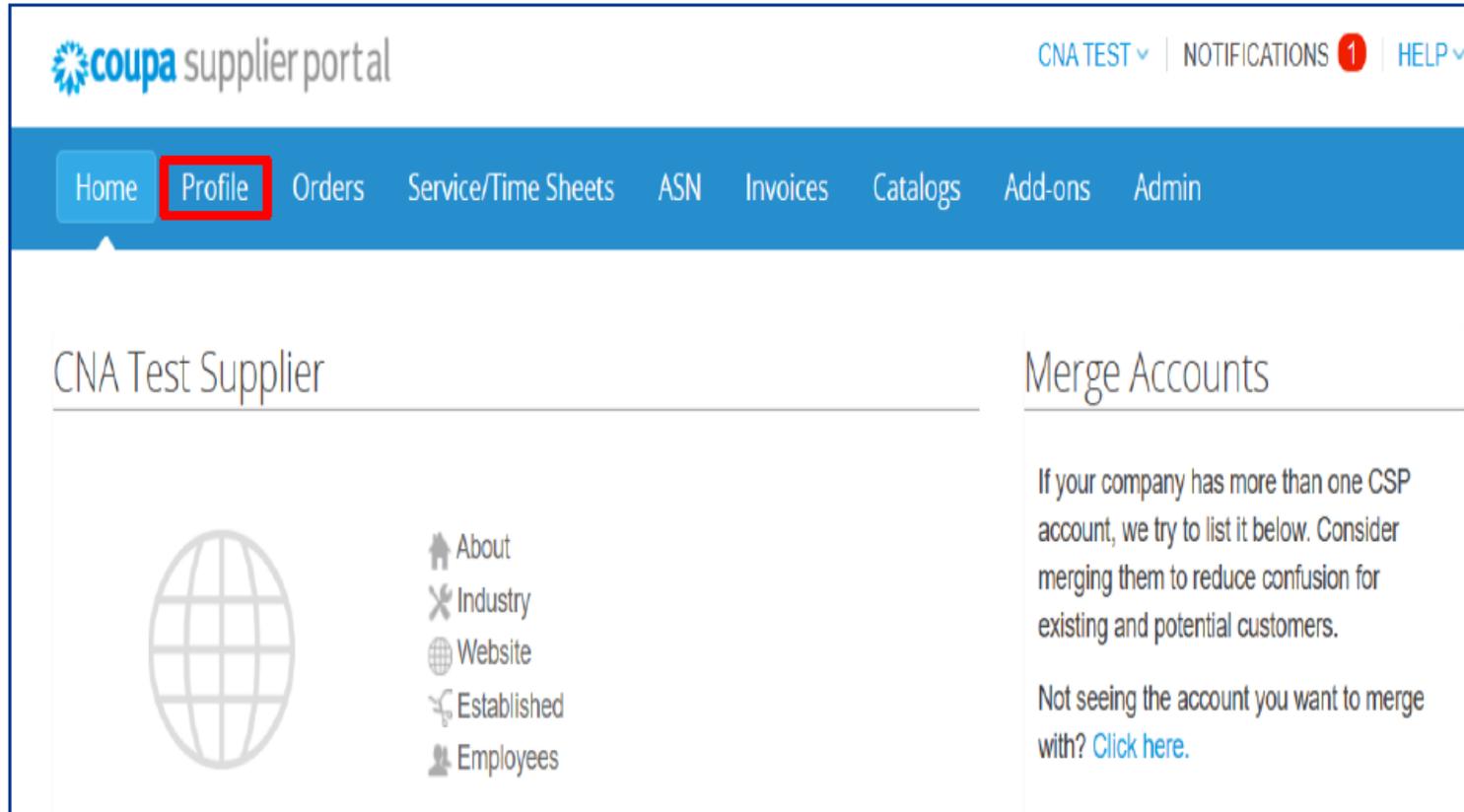
Ship-To Address: 2 Chase Corporate Drive
Suite 200
Birmingham, AL 35244
United States
Locator Code: ALX1
Attn: Shagun Chaudhry
Terms: None



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.



The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the top right, there are links for "CNA TEST" with a dropdown arrow, "NOTIFICATIONS" with a red circle containing the number "1", and "HELP" with a dropdown arrow. Below this is a blue navigation bar with the following menu items: "Home", "Profile" (highlighted with a red box), "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Add-ons", and "Admin". The main content area is divided into two columns. The left column is titled "CNA Test Supplier" and features a globe icon and a list of links: "About", "Industry", "Website", "Established", and "Employees". The right column is titled "Merge Accounts" and contains the text: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers." and "Not seeing the account you want to merge with? [Click here.](#)"

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.

Thank You

Please direct any questions to: suppliers@cna.com



Legal Disclaimer

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