



**JELD-WEN**

**Coupa Supplier Webinar**

**JW<sup>®</sup>**

# Agenda



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What is the Coupa Supplier Portal (CSP)?	3-5
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**What is the Coupa Supplier Portal?**

# Implementing Coupa is part of a larger effort to deliver a more integrated procurement platform that will help JELD-WEN better manage supplier spend



By having a centralized, standardized and transparent platform, JELD-WEN can make informed buying decisions to meet our business needs and better serve our customers. Coupa provides a direct Supplier portal for streamlined transactions with JELD-WEN.



## Dedicated Supplier Portal

- Access purchase orders in one place
- Add in additional users as needed to manage transactions
- Multi-factor authentication helps keep data secure



## Reduced Transactional Workload

- Streamlined purchase order processing
- Visibility into purchase order details
- Communicate with JELD-WEN regarding specific purchase orders and supplier information
- **Note: JELD-WEN is not using Coupa for invoicing/remittance/payments**



## Digitally Managed Supplier Information

- New suppliers will be able to provide their information through a secure, digital channel
- Existing suppliers may work with JELD-WEN contact to update their information



## What is Changing

- POs will be emailed via Coupa. When receiving PO's, suppliers will have the option to join the Coupa Supplier Portal (CSP) for free.
- Supplier Onboarding and Information Updates will be processed through Coupa.



## What is Not Changing

- Invoices should continue to be submitted via the [jeldweninc@pdf.basware.com](mailto:jeldweninc@pdf.basware.com) email
- Using the Coupa Supplier Portal (CSP) is not required of suppliers and accessing POs solely via email is still an option.

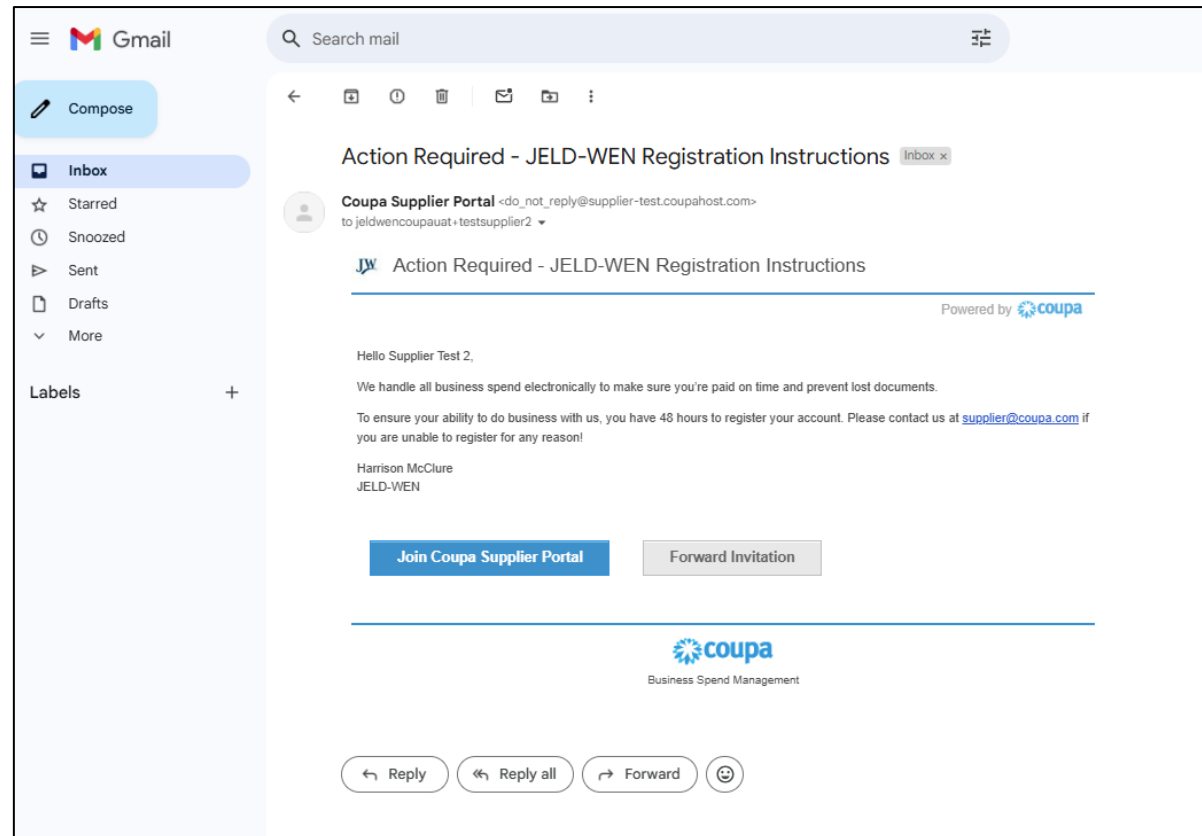
# Accessing the CSP

# Accessing the CSP (1 of 5)



Suppliers will have received a connection invitation via email.

- The invitation email will be sent to the **Primary Contact**.
  - The Primary Contact is considered the Administrator of the Supplier's CSP account and does not have to be the primary business contact.
- Click **Join Coupa Supplier Portal** to continue.
  - Note: Check your Spam or Junk folders if you have not received an expected invitation.



# Accessing the CSP (2 of 5)



## Suppliers without existing accounts will be prompted to create an account. Suppliers with an existing CSP account may Log In instead.

- Suppliers without an existing CSP account will need to complete the required fields to create an account.
  - Required fields are marked with a red asterisk (\*).
  - A one-time verification code will be sent to the primary contact's email. Future codes will be provided via multi-factor authentication if setup.
- Suppliers with an existing CSP account will be able to Log In instead.
  - The login email must match the address where the invitation was received.

The screenshot shows the 'Create an Account' page in the Coupa Supplier Portal. The page title is 'coupa supplier portal' and it is marked as 'Secure'. The main heading is 'Create an Account'. Below the heading, there is a message: 'JELD-WEN is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with JELD-WEN so you're ready to do business together.'

The form contains the following fields:

- \* Business Name:** Text input field containing 'Swift Group'. Below it is a note: 'Your legal business name (or legal personal name if an individual)'.
- \* Email:** Text input field containing 'coupa.ccc+jd01@gmail.com'.
- \* First Name:** Text input field containing 'Valued'.
- \* Last Name:** Text input field containing 'Supplier'.
- \* Password:** Text input field with a strength indicator.
- \* Confirm Password:** Text input field with a strength indicator. Below it is a note: 'Use at least 8 characters and include a number and a letter.'
- \* Country/Region:** Dropdown menu.
- \* Tax Registration:** Text input field containing '#####'. To its right is an information icon (i).
- I do not have a Tax ID
- I accept the [Privacy Policy](#) and the [Terms of Use](#)

At the bottom of the form is a blue button labeled 'Create an Account', which is highlighted with an orange border. Below the button are two links: 'Already have an account? [LOG IN](#)' and 'Forward this to someone'.

# Accessing the CSP (3 of 5)



After the CSP registration is complete, a pop-up window will show where they will be asked to provide **additional information** – addresses/bank. Suppliers also have the option to tick **'Do not accept...'** this step and the next few steps and update this later.

**Coupa Supplier Portal Onboarding**  
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

[Account Details](#) [Payment Information](#)

**Primary Address**

\* Country/Region      \* Address Line 1      Address Line 2

\* City      \* State      \* Postal Code

Next

**Coupa Supplier Portal Onboarding**  
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Primary Address saved successfully

[Account Details](#) [Payment Information](#)

**Virtual Card** Customer Supported

Please enter the following information to receive Virtual Card payments.

\* Payment Method Name      \* Email Address

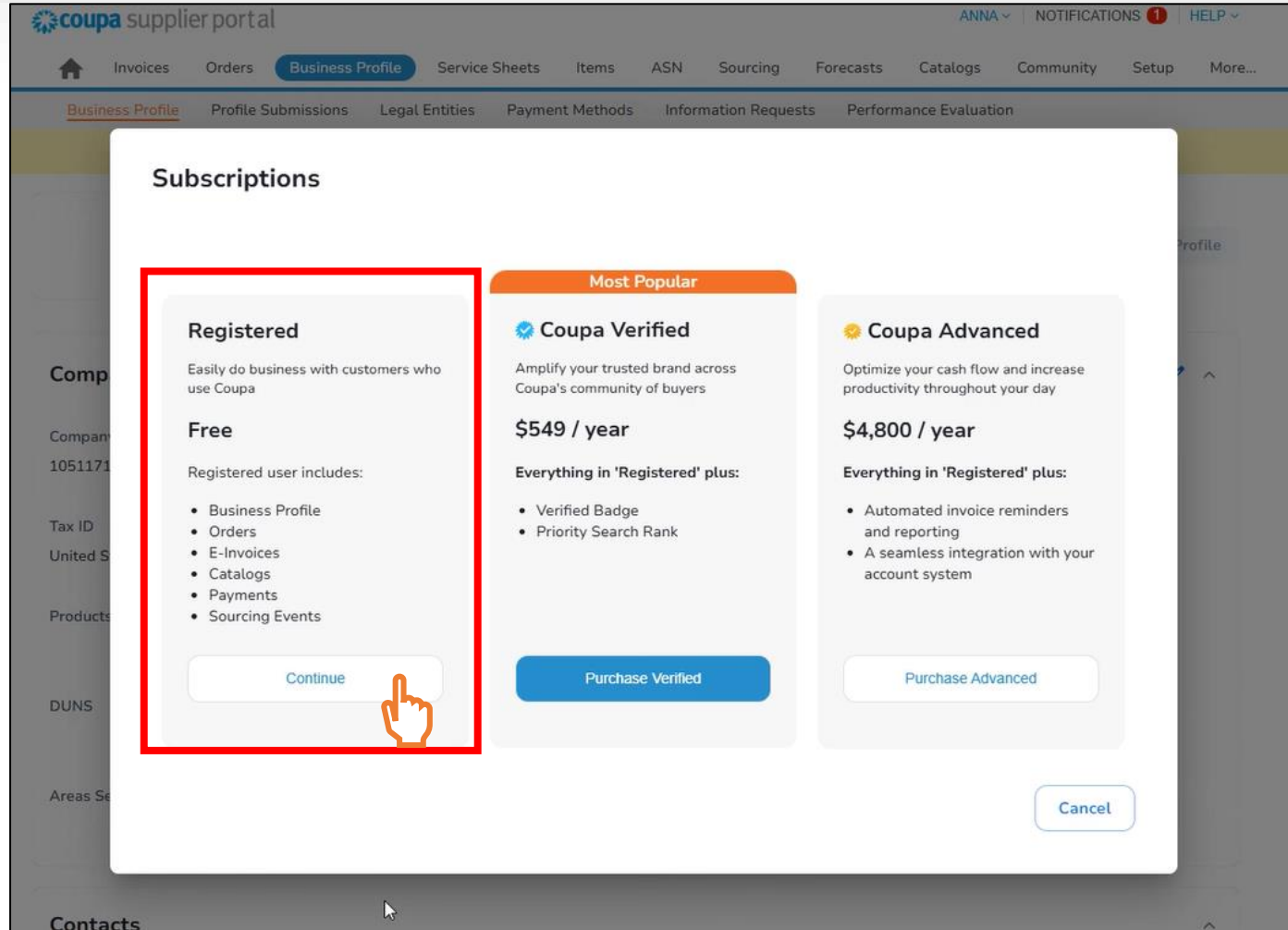
Do not accept Virtual Card payments from this customer

Next

# Accessing the CSP (4 of 5)



- The Coupa Supplier Portal has three account options – **Registered** is the preferred option.
  - **Registered** provides all necessary access to transact with JELD-WEN free of charge
  - **OPTIONALLY** suppliers can elect to pay a subscription for Verified/Advanced to better connect with other customers using Coupa.



# Accessing the CSP (5 of 5)



- After profile setup, the home page will be displayed.
  - Multi-factor authentication will be covered in another section.
  - Once Again: **Coupa Verification** is a paid service and is **not required** to do business with your customers.

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal' text, along with user information 'JONITEST', a notification bell with a red '2', and a 'HELP' link. A navigation bar below the header contains icons and labels for 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. The main content area features a large teal banner with the text 'Verify Your Account And Get Noticed' and a 'Get Verified' button. Below this is a profile card for 'JT Coupa Supplier Webinar' with a 'Get Verified' button and a note that the profile was last updated 13 days ago. The 'Recent Activity' section shows three items: 'Customer 1', 'Customer 2', and 'nutanix-uat'. To the right, an 'Announcements' section displays 'No Announcements'. At the bottom, a summary dashboard includes four categories: 'Two Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (3 Connections).

# Purchase Order Management

# Purchase Order Management (1 of 8)



- View Purchase Orders

- Once logged in to CSP, click on **Orders tab**.
- The Orders page with the Purchase Orders table appears
- Alternatively, when a PO is issued, notification is sent to your email.

**coupa** supplier portal TEST | NOTIFICATIONS **2** | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer: JELD-WEN

## Purchase Orders

**Instructions From Customer**  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
6000000200	05/22/25	Issued	None	1 Each of test	No	5,000.00 USD		
6000000153	05/19/25	Issued	None	Test	No	100.00 USD		
6000000064	05/08/25	Issued	None	1 Each of test	No	10.00 USD		
6000000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00 USD		
6000000033	04/21/25	Issued	None	1 Each of Service	No	100.00 USD		
6000000031	04/18/25	Cancelled	None	1 Each of Service 64	No	20.00 USD		
6000000030	04/18/25	Issued	None	1 Each of Service 66	No	10.00 USD		
6000000029	04/18/25	Issued	None	1 Each of Service 1 Each of 1	No	100.00 USD		
7	11/05/24	Issued	None	1 Each of line 1 1 Each of line 2	No	3.00 USD		

Chat with Coupa Support

# Purchase Order Management (2 of 8)



- View Purchase Orders Lines

- Once logged in to CSP, select **Orders tab** from the top navigation bar.
- Click on the **Order Lines** tab
- Select the Customer "JELD-WEN" from the select Customer Drop-Down list in the top right corner
- All the PO lines from "JELD-WEN" are visible as shown in the screenshot.
- You can also create a custom view, which we will learn in next slides

**coupa** supplier portal TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders **Order Lines** Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer **JELD-WEN**

### Purchase Order Lines

Export to View All Search

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total	Need By	Order Date
6000000200	1	Issued	1 Each of test	1	5000.00	05/31/25	05/22/25
6000000153	1	Issued	Test	None	100.00	05/23/25	05/19/25
6000000064	1	Issued	1 Each of test	1	10.00	05/16/25	05/08/25
6000000029	2	Issued	1 Each of 1	1	0.00	04/25/25	04/18/25
6000000034	1	Issued	1 Each of Test Item	1	100.00	05/16/25	04/21/25
6000000033	1	Issued	1 Each of Service	1	100.00	04/16/25	04/21/25
6000000031	1	Cancelled	1 Each of Service 64	1	20.00	04/25/25	04/18/25
6000000030	1	Issued	1 Each of Service 66	1	10.00	None	04/18/25
6000000029	1	Issued	1 Each of Service	1	100.00	04/25/25	04/18/25

# Purchase Order Management (3 of 8)



- Acknowledging a PO
  - Once logged in to CSP, select **Orders tab** from the top navigation bar.
  - Search and Click on the PO Number
  - Click the “Acknowledged Box”

coupa supplier portal

TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

### Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
6000000200	5/22/25	Issued	None	1 Each of test	No	5,000.00 USD		
6000000153	05/19/25	Issued	None					
6000000064	05/08/25	Issued	None					
6000000034	04/21/25	Issued	None					
6000000033	04/21/25	Issued	None					
6000000031	04/18/25	Cancelled	None					
6000000030	04/18/25	Issued	None					
6000000029	04/18/25	Issued	None					
7	11/05/24	Issued	None					

coupa supplier portal

TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

### Purchase Order #6000000200

**General Info**

Status Issued - Sent via Email

Order Date 05/22/25

Revision Date 05/22/25

Requester Caitlin Hoch

Email choch@crosscountry-consulting.com

Payment Term None

Attachments None

**Acknowledged**

Assigned to Select

**Shipping**

Ship-To Address 4100 Karona Court  
Caledonia, MI 49316  
United States  
Location Code: 020  
Attn: Caitlin Hoch

Terms None

**Shipment Tracking**

No shipment tracking.

Note: JELD-WEN strongly encourages the use of PO Acknowledgements so we can confirm you have received the PO

# Purchase Order Management (4 of 8)



- Exporting PO Information

- Once logged in to CSP, select **Orders tab** from the top navigation bar.
- Click on **Export To** Button in the blue bar
- A **drop down** will appear. Select one of the option from **CSV Plain, CSV for Excel, Excel**
- A file will be downloaded or sent to your email address depending on the size of the file.
- Similar information can be downloaded for **Order Line** by following the above steps

The image shows two screenshots of the Coupa Supplier Portal. The top screenshot displays the 'Purchase Orders' page for customer JELD-WEN. It features a table with columns: Order Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. An 'Export to' dropdown menu is open, showing options: 'CSV plain (current columns)', 'CSV for Excel (current columns)', and 'Excel (current columns)'. The bottom screenshot displays the 'Purchase Order Lines' page for the same customer. It features a table with columns: Order Number (Header), Line, Order Status (Header), Item, Total Item Quantity, Line Total, Need By, and Order Date. An 'Export to' dropdown menu is also open, showing the same three options.

Order Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
000200	05/22/25	Issued	05/27/25	1 Each of test	No	5,000.00 USD		
000153	05/19/25	Issued	None	Test	No	100.00 USD		
000064	05/08/25	Issued	None	1 Each of test	No	10.00 USD		
000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00 USD		
000033	04/21/25	Issued	None	1 Each of Service	No	100.00 USD		

Order Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total	Need By	Order Date
000200	1	Issued	1 Each of test	1	5000.00	05/31/25	05/22/25
000153	1	Issued	Test	None	100.00	05/23/25	05/19/25
000064	1	Issued	1 Each of test	1	10.00	05/16/25	05/08/25
000029	2	Issued	1 Each of 1	1	0.00	04/25/25	04/18/25
000034	1	Issued	1 Each of Test Item	1	100.00	05/16/25	04/21/25
000033	1	Issued	1 Each of Service	1	100.00	04/16/25	04/21/25
000031	1	Cancelled	1 Each of Service 64	1	20.00	04/25/25	04/18/25
6000000030	1	Issued	1 Each of Service 66	1	10.00	None	04/18/25
6000000029	1	Issued	1 Each of Service	1	100.00	04/25/25	04/18/25
7	2	Issued	1 Each of line 2	1	2.00	None	11/05/24

# Purchase Order Management (5 of 8)



- **Creating Custom Views**

- Once logged in to CSP, select **Orders tab** from the top navigation bar.
- Click on the **drop down in View**
  - Coupa Offers pre filtered View as shown in the screenshot
- To create a Custom View, click on **“Create View”**
- In Name field “ Enter the name of the view
- Under Columns section, Move the available fields from **“Available Columns”** to **“Selected Columns”**
- Similar view can be created for **Order Lines** by following above steps

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total
6000000200	05/22/25	Issued	05/27/25	1 Each of test	No	5,000.00
6000000153	05/19/25	Issued	None	Test	No	100.00
6000000064	05/08/25	Issued	None	1 Each of test	No	10.00
6000000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00
6000000033	04/21/25	Issued	None	1 Each of Service	No	100.00
6000000031	04/18/25	Cancelled	None	1 Each of Service 64	No	20.00
6000000030	04/18/25	Issued	None	1 Each of Service 66	No	10.00 USD

**Create New Data Table View**

General

Name:

Visibility:  Only Me  Everyone

Start with view:

Conditions

Match Conditions:

Filter By:  Filter Clause:  Filter Text:

**Columns**

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

Available Columns	Selected Columns
Comments	PO Number
Payment Agreements	Order Date
PO ID	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Assigned To
	Actions

# Purchase Order Management (6 of 8)



- Tracking Shipment

- Once logged in to CSP, select **Orders tab** from the top navigation bar.
- Search and click on the PO number
- Click on **Add** in **Shipment Tracking** section
- Complete the tracking details, click on **Save**

1

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
6000000200	05/22/25	Issued	05/27/25	1 Each of test	No	5,000.00 USD		
600000153	05/19/25	Issued	None	Test	No	100.00 USD		
600000064	05/08/25	Issued	None	1 Each of test	No	10.00 USD		
600000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00 USD		
600000033	04/21/25	Issued	None	1 Each of Service	No	100.00 USD		
600000031	04/18/25	Cancelled	None	1 Each of Service 64	No	20.00 USD		
600000030	04/18/25	Issued	None	1 Each of Service 66	No	10.00 USD		
600000029	04/18/25	Issued	None	1 Each of Service	No	100.00 USD		

3

Create Shipment Tracker

Enter tracking number for entire PO. To ship PO partially, create ASN.

\* Tracking Number

\* Carrier

Note

Cancel Save

2

Purchase Order #6000000200

General Info

Status Issued - Sent via Email

Order Date 05/22/25

Revision Date 05/22/25

Requester Caitlin Hoch

Email choch@crosscountry-consulting.com

Payment Term None

Attachments None

Acknowledged

Assigned to

Shipping

Ship-To Address 4100 Karona Court  
Caledonia, MI 49316  
United States  
Location Code: 020  
Attn: Caitlin Hoch

Terms None

Shipment Tracking

No shipment tracking.

4

Shipment Tracking (1)

ups 1ZW40Y530316518047

Status Out for Delivery

Progress bar:

# Purchase Order Management (7 of 8)



- Commenting to JELD-WEN contact

- Once logged in to CSP, select **Orders** tab from the top navigation bar.
- Search and click on the **PO number**
- Scroll down to comments section.
- Add a comment to your Buyer from the JELD-WEN , **starting with “@” and following with the name .**
- **Select your buyer** from the drop-down list.
- Click on **Add Comment** after completing the message

1

coupa supplier portal

TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Export to - View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
6000000200	05/22/25	Issued	05/27/25	1 Each of test	No	5,000.00 USD		
6000000153	05/19/25	Issued	None	Test	No	100.00 USD		
6000000064	05/08/25	Issued	None	1 Each of test	No	10.00 USD		
6000000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00 USD		
6000000033	04/21/25	Issued	None	1 Each of Service	No	100.00 USD		
6000000031	04/18/25	Cancelled	None	1 Each of Service 64	No	20.00 USD		
6000000030	04/18/25	Issued	None	1 Each of Service 66	No	10.00 USD		
6000000029	04/18/25	Issued	None	1 Each of Service	No	100.00 USD		

3

Comments Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

2

coupa supplier portal

TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

Purchase Order #6000000200

General Info

Status Issued - Sent via Email

Order Date 05/22/25

Revision Date 05/22/25

Requester Caitlin Hoch

Email choch@crosscountry-consulting.com

Payment Term None

Attachments None

Acknowledged

Assigned to Select

Shipping

Ship-To Address 4100 Karona Court  
Caledonia, MI 49318  
United States  
Location Code: 020  
Attn: Caitlin Hoch

Terms None

Shipment Tracking No shipment tracking.

4

Comments Mute Comments

Enter Comment

@test

Budget IO Testing (budgetio)

Test User1 (Coupatestuser)

UAT Tester (uattester)

5

Comments Mute Comments

Enter Comment

@Test User1 (Coupatestuser) : Please confirm the remit to address

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

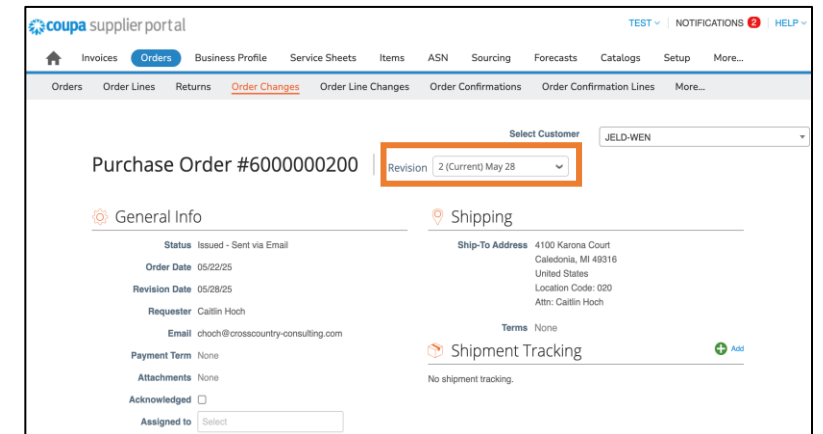
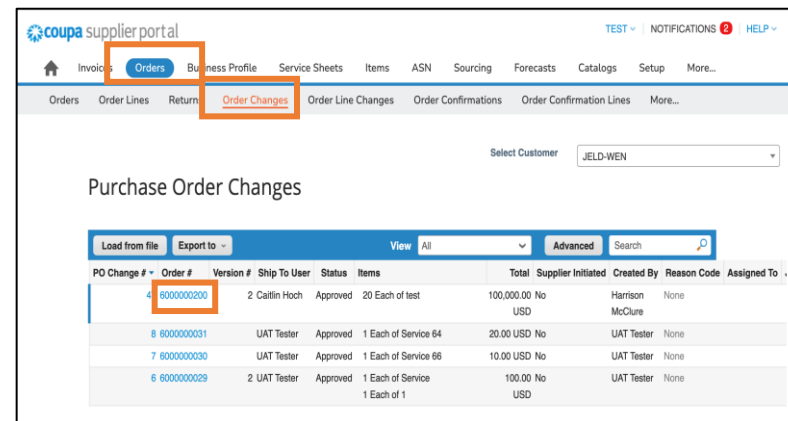
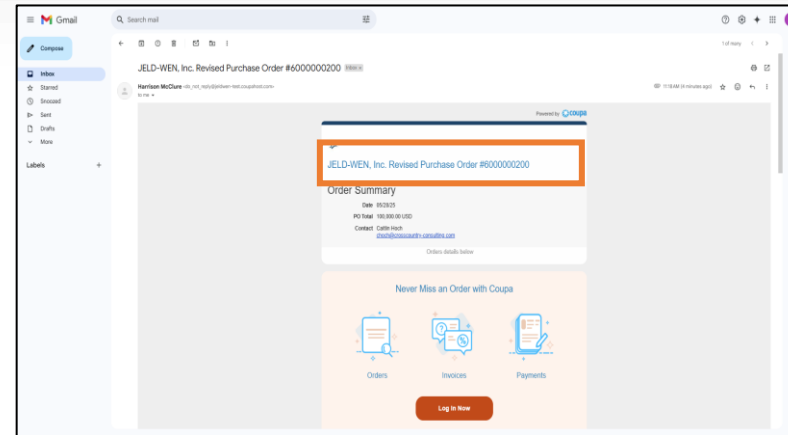
Add Comment

# Purchase Order Management (8 of 8)



- PO Changes

- As soon as the PO change is approved, you will get an email notification as shown.
- Once logged in to CSP, select **Orders tab** from the top navigation bar.
- Click on the **Order Change tab**
- Search for Revised PO Number and Click on the **PO Number**
- Confirm you are viewing the **latest version** of the PO
- Follow the steps of Acknowledgement, ASN, collaboration with buyer as stated in previous slides



# **Advance Ship Notices**

# Advance Ship Notices (1 of 2)



- **Advanced Shipment Notification (ASN):** Electronic notice of upcoming delivery.
- **Includes:** Shipment contents, packaging details, and expected arrival time.
- **Purpose:** Enhances supply chain visibility, streamlines receiving, and improves warehouse planning.

- **Create ASN**

- Once Logged into CSP, click on **Orders Tab**
- Search and Click on the PO number for which you want to create an ASN.
- Click on **“Flip to ASN”** Under **Actions** column
- Complete all the **mandatory information** (marked with \*)
- Under the Lines section, Enter information of **“Shipped Qty”**
- Click on **Submit**

**coupa supplier portal** TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

### Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
600000200	05/22/25	Issued	05/27/25	1 Each of test	No	5,000.00 USD		<b>Flip to ASN</b>
600000153	05/19/25	Issued	None	Test	No	100.00 USD		Flip to ASN
600000064	05/08/25	Issued	None	1 Each of test	No	10.00 USD		Flip to ASN
600000034	04/21/25	Issued	None	1 Each of Test Item	No	100.00 USD		Flip to ASN
600000033	04/21/25	Issued	None	1 Each of Service	No	100.00 USD		Flip to ASN
600000031	04/18/25	Cancelled	None	1 Each of Service 64	No	20.00 USD		Flip to ASN
600000030	04/18/25	Issued	None	1 Each of Service 66	No	10.00 USD		Flip to ASN
600000029	04/18/25	Issued	None	1 Each of Service 1 Each of 1	No	100.00 USD		Flip to ASN

**coupa supplier portal** TEST | NOTIFICATIONS 2 | HELP

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer JELD-WEN

### Create Advance Ship Notice

General Info

- \* ASN #
- Status: Draft
- Gross Weight
- Ship Date
- Expected Delivery Date

Ship To

- Ship To Warehouse
- Ship To Address: 4100 Karona Court, Caledonia, MI 49316, United States, Location Code: 020
- Ship To Attention: Caitlin Hoch

Shipping Info

- Tracking Number
- Carrier
- Shipping Method

**Lines**

Description	Shipped Qty	UOM	Received Quantity	Status
test	1	Each	0	Draft

Supplier Part Number PO # PO Line Po Line Quantity

None 600000200 1 1.0

Invoice Num Reference Invoice Invoice Line Invoice Line Qty Supplier AUX Part Number

None

Match Reference

None

Comments

# Advance Ship Notices (2 of 2)



coupa supplier portal TEST | NOTIFICATIONS 2 | HELP

Invoices Orders Business Profile Service Sheets Items **ASN** Sourcing Forecasts Catalogs Setup More...

Select Customer JELD-WEN

## Advance Ship Notices

Load from file Export to View All Advanced Search

ASN Number	Status	Ship Date	Expected Delivery Date	Ship to Attention	Carrier	Tracking #	Last Updated Date	ASN Lines	PO Number	Action
Test	Pending Receipt	05/27/25	None	Caitlin Hoch	None		05/27/25	1	600000200	

Per page 15 | 45 | 90

You can edit

- ASN#
- Gross weight
- Ship date
- Expected Delivery date
- Shipping Info Section
- Comments (if any)

Once the update is done, click on "Update"

## View and Manage ASN

- Once Logged into CSP, click on **ASN tab**. The **Advance Ship Notices** page appears
- Select "JELD-WEN" as customer from the drop-down list in the top right corner
- To View the ASN, click on **ASN #**, under **ASN Number** column
- To Edit, Click on the **pencil icon** under **Action** column
- To Cancel the ASN, click on **"Cancel"** Icon under **Action** column

Lines

1	Description	Shipped Qty	UOM	Received Quantity	Status
test		1	Each	0	Pending Receipt

Supplier Part Number PO # PO Line Po Line Quantity  
None 600000200 1 1.0

Invoice Num Reference Invoice Invoice Line Invoice Line Qty Supplier AUX Part Number  
None None

Match Reference  
None

Comments

Cancel **Update**

**Q&A Break!**

# Updating Supplier Information

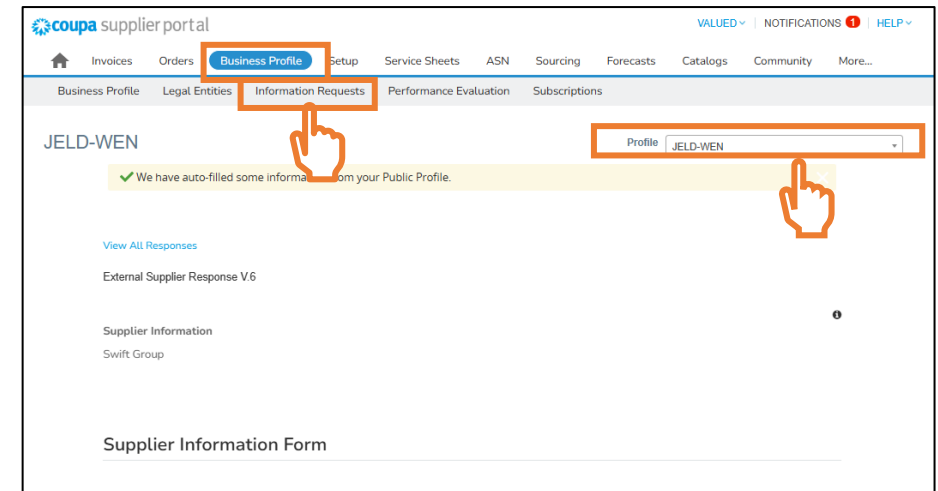
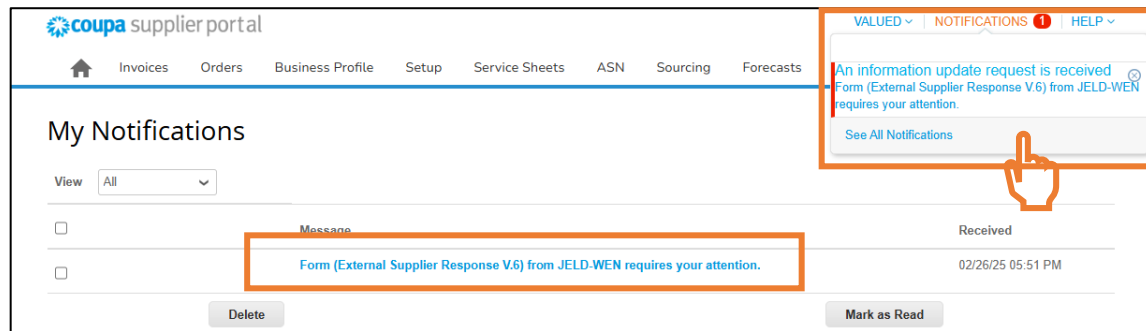
# Supplier Information Requests (1 of 8)



You may receive a notification from JELD-WEN requesting an update the supplier's information.

To complete the supplier information form, suppliers can check the following:

- Go to **Home > Recent Activity** section, and then click on 'Information Request' link;
- Go to **Notifications** and click the **Update your profile for Coupa** link, or...
- Go to **Business Profile** tab, and then **Information Requests** *secondary* tab.



# Supplier Information Requests (2 of 8)



Some fields will be auto-populated based on the initial request from Coupa.

You must populate the rest of the form including the required fields such as:

- Doing Business as:
- Supplier Preferred Language
- Code of Conduct
- Tax Information
- Address and Contact Details
- Other necessary information

Although Coupa allows you to submit more than one payment method on the form, JELD-WEN requires only one payment method.

# Supplier Information Requests (3 of 8)



Once all the required fields and necessary documents are populated and attached, click on the **‘Submit for Approval’** button.

**Comments** can be added to communicate with the JELD-WEN team.

**Internal Use Only**

The below fields are for JELD-WEN reviewers to populate. To save your information, scroll to the bottom and select "Save." If you are ready to submit your information to JELD-WEN select "Submit For Approval."

**Estimated Annual Spend**  
\$0 to \$50,000

**Payment Terms**  
NT60

**Category**  
Indirect - Material

**Navex Attachment**  
None

**Navex Rating**  
None

**1099 Supplier?**  
None

**1099 Classification**  
None

**Last W-9 Review Date**  
None

**OFAC Attachment**  
None

**TIN Matching Document**  
None

[Decline](#) [Save](#) [Submit for Approval](#)

**Comments** Mute Comments

Enter Comment

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

Send Comment notification to a user by typing @name (ex. @JohnSmith)

[Add Comment](#)



# Supplier Information Requests (4 of 8)



Once all the required fields are populated, the Supplier submits form for review and approval.

The screenshot displays the Coupa Supplier Portal interface. At the top left is the 'coupa supplier portal' logo. On the top right, there are links for 'VALUED', 'NOTIFICATIONS 0', and 'HELP'. A navigation menu below the header includes 'Invoices', 'Orders', 'Business Profile' (highlighted), 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Community', and 'More...'. A secondary menu below that includes 'Business Profile', 'Legal Entities', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area shows 'JELD-WEN' as the profile name, with a 'Profile' dropdown menu set to 'JELD-WEN'. A green notification bar with a white 'X' icon on the right contains the text 'Your information has been submitted'. Below this bar is a blue link 'View All Responses'. At the bottom of the page, the text 'External Supplier Response V.6' is visible, followed by 'Pending Approval' and an information icon.

# Supplier Information Requests (5 of 8)



When the form is submitted, the status is now “Pending Approval”

External Supplier Response V.6

**Pending Approval**

Supplier Information  
Star City

Supplier Information Form

Welcome to JELD-WEN's Supplier Registration Process! To complete your onboarding, please provide the required company details through this form. This information helps us set you up as an approved supplier and ensures smooth transactions.

Please be prepared to provide:

- Company details (legal name, address, tax ID, and contact information)
- Banking details for payment processing
- Agreement to the JELD-WEN Supplier Code of Conduct

Complete the form as soon as possible to avoid delays in onboarding. If you have any questions, please use the comment box at the bottom of this page.

coupa supplier portal

JAMIE | NOTIFICATIONS 1 | HELP

Business Profile | Legal Entities | **Information Requests** | Performance Evaluation | Subscriptions

JELD-WEN Profile: JELD-WEN

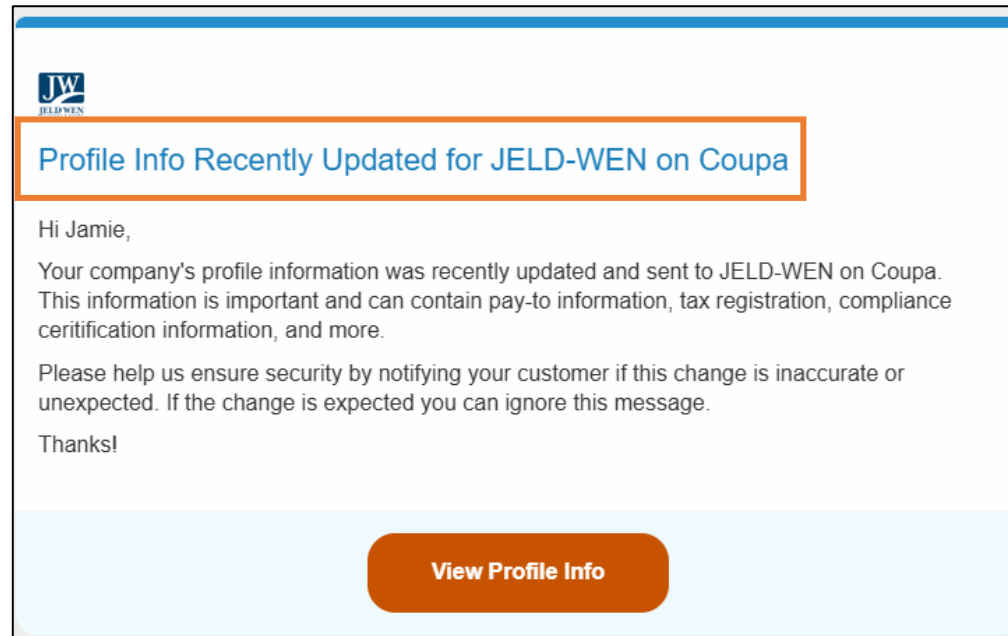
Form Responses

Form	Status	Created Date	Submitted At
<a href="#">External Supplier Response V.6</a>	Pending Approval	03/20/25	03/20/25

# Supplier Information Requests (6 of 8)



A notification will be sent to your email with the subject **Profile Info Recently Updated for JELD-WEN on Coupa**, validating that the external form has been successfully submitted for approval



# Supplier Information Requests (7 of 8)



When the form is fully approved by JELD-WEN, the status is now “Applied”

External Supplier Response V.6

Supplier Information

Star City

**Applied**

Supplier Information Form

Welcome to JELD-WEN's Supplier Registration Process! To complete your onboarding, please provide the required company details through this form. This information helps us set you up as an approved supplier and ensures smooth transactions.

Please be prepared to provide:

- Company details (legal name, address, tax ID, and contact information)
- Banking details for payment processing
- Agreement to the JELD-WEN Supplier Code of Conduct

Complete the form as soon as possible to avoid delays in onboarding. If you have any questions, please use the comment box at the bottom of this page.

coupa supplier portal

JAMIE | NOTIFICATIONS 1 | HELP

Invoices Orders **Business Profile** Setup Service Sheets ASN Sourcing Forecasts Catalogs Community More...

Business Profile Legal Entities **Information Requests** Performance Evaluation Subscriptions

JELD-WEN Profile JELD-WEN

Form Responses

View All Advanced Search

Form	Status	Created Date	Submitted At
<a href="#">External Supplier Response V.6</a>	Applied	03/20/25	03/20/25

# Supplier Information Requests (8 of 8)



You will be notified via Email that the form response submitted to JELD-WEN was approved.

The screenshot shows an email notification with a blue header bar. In the top left corner is the J.W. Elwell logo. A prominent orange-bordered box contains the subject line: "Profile Info submitted to JELD-WEN was Approved". The body of the email is as follows:

Hi Jamie,

The company profile information that you submitted to your customer, JELD-WEN was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

At the bottom of the email, there is a light blue footer area containing a dark orange button with the text "View Profile Info".

**Supplier – Initiated Information Update**

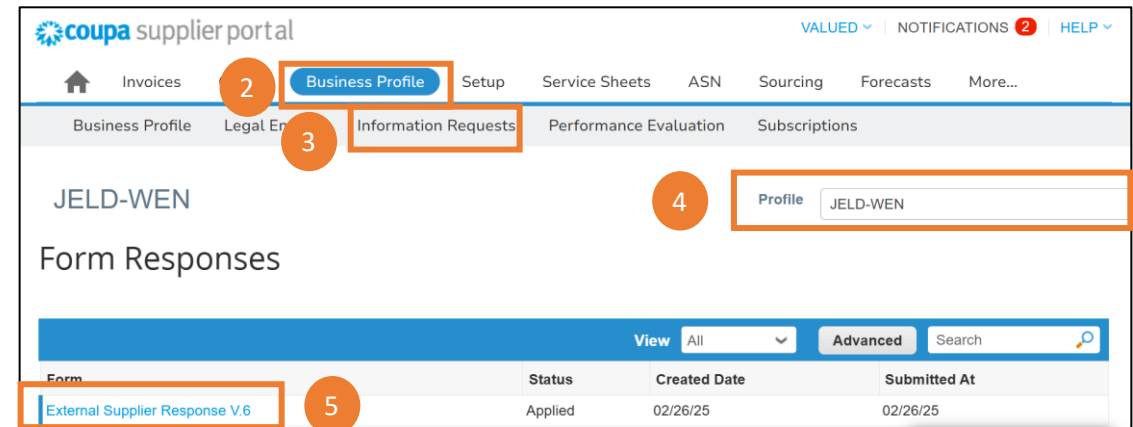
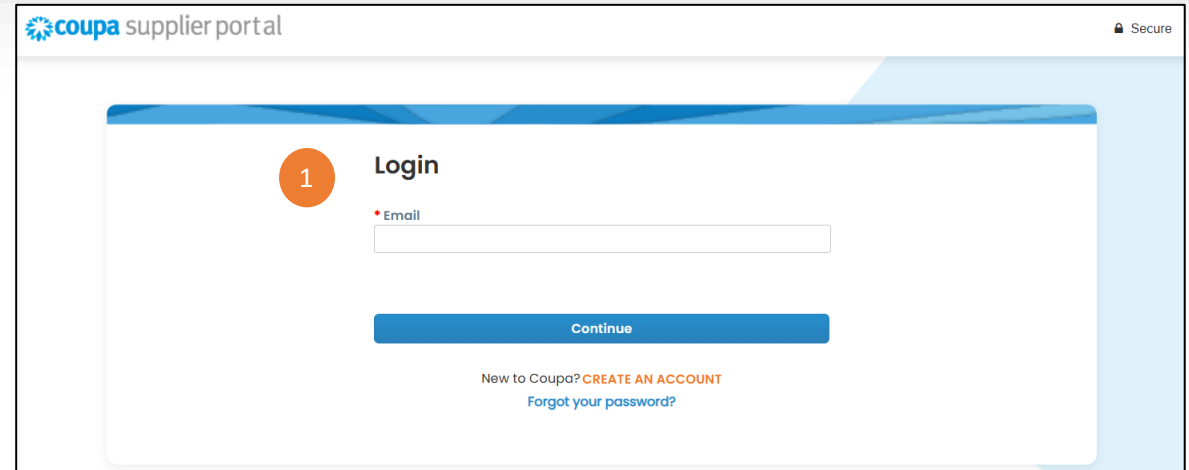
# Supplier – Initiated Information Update (1 of 2)



Suppliers can initiate an update on their supplier information directly from the Coupa Supplier Portal (CSP). As a pre-requisite, Suppliers must have been onboarded via SIM previously. Once logged in, navigate to the **Business Profile** tab, and on the **Information Requests** sub-tab, select the **Profile and Response** you would like to update your record from.

To initiate an update, complete the following steps:

1. Log in to the Coupa Supplier Portal (CSP).
2. Navigate to the “Business Profile” tab at the top of the screen.
3. Click the “Information Requests” sub-tab under “Business Profile”,
4. Under Profile, make sure the correct company (e.g., JELD-WEN) is selected.
5. Locate the form you want to update (e.g., “External Supplier Response V6”) and click it to begin editing.



# Supplier – Initiated Information Update (2 of 2)



6. The form will be displayed. Scroll down and click Update Info to make your changes and submit for approval

# Setting up Multi-Factor Authentication

# Setting up Multi-Factor Authentication (1 of 3)

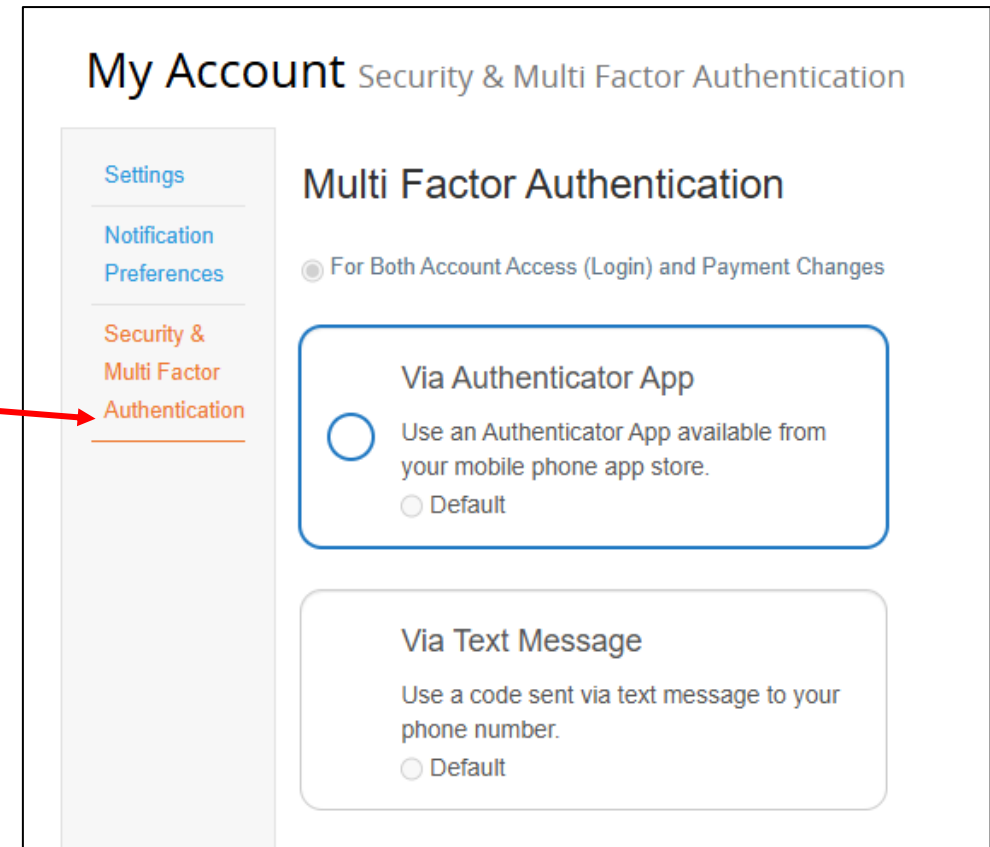
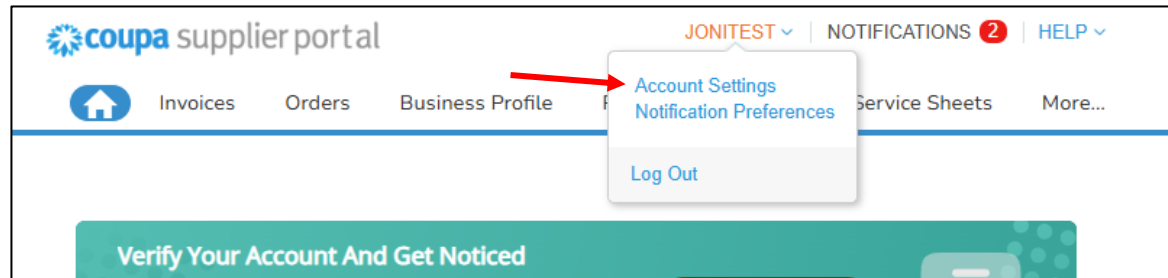


Multi-Factor Authentication (MFA) is required to manage legal entities and other financial details. Suppliers may choose to use an authentication app or to use SMS – however, the authentication app method is more secure and is the recommended method.

Suppliers will be prompted to set up MFA as part of their first log-in.

Suppliers with existing CSP accounts will need to navigate to the Account Settings page instead.

- Hover over the Name Menu
- Click Account Settings
- Click Security & Multi Factor Authentication



# Setting up Multi-Factor Authentication (2 of 3)



## Via Authenticator App

- Most secure
- Free authenticator apps through Microsoft, Google, etc.

## Via SMS

- Will send a code through text
- Often slower to deliver codes than an authenticator app

The screenshot shows a web interface for 'My Account' with a sub-section for 'Security & Multi Factor Authentication'. On the left is a navigation menu with 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication' (which is highlighted with an orange underline). The main content area is titled 'Multi Factor Authentication' and has a radio button selected for 'For Both Account Access (Login) and Payment Changes'. Below this are two options: 'Via Authenticator App' and 'Via Text Message'. The 'Via Authenticator App' option is highlighted with a blue border and includes a radio button and the text 'Use an Authenticator App available from your mobile phone app store. Default'. The 'Via Text Message' option includes a radio button and the text 'Use a code sent via text message to your phone number. Default'.

# Setting up Multi-Factor Authentication (3 of 3)



Recovery codes are one-time use and allow the user to skip MFA. These are backup codes only, not to be used as the primary verification method.

- Download or copy codes.
- These codes are a sample only.

### Save Your Backup Codes ✕

These codes were generated on December 19, 2024

Emergency Recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

egx4YA	BBYtdw
6pCo6Q	MR-Psg
74A4ZQ	FQlqRg

[Copy](#) [Download](#) [Print](#)

# Managing Additional Users

# Managing Additional Users (1 of 2)



Suppliers can add as many users as needed to support transactions with customers using Coupa. The Admin will need to create new accounts and assign permissions to new users.

- The Admin page provides quick links to user management, legal entity setup, and several other management tools.
- Invite New Users
  - Click Setup.
  - Click Users.
  - Click Invite User.
  - Complete required information.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Setup' (highlighted with a red arrow), 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. Below this, the 'Admin' section is active, with sub-links for 'Customer Setup' and 'Connection Requests'. The left sidebar contains a list of management tools, with 'Users' (highlighted with a red arrow) selected. The main content area shows the 'Admin Users' page, featuring an 'Invite User' button (highlighted with a red arrow) and a table of existing users.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
JoniTest SwopeTest	joniswopeccc@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Restricted Worker Access Restricted Worker Assignment Access Service Sheets Sourcing	nutanix-uat	None	Edit

Per page 5 | 10 | 15

# Managing Additional Users (2 of 2)



- First Name, Last Name, and email are required.
- Manage Permissions
  - Only give relevant permissions.
- If the supplier has multiple customers using Coupa, the Admin can grant or revoke access to specific customers by checking the box next to the customer's name.
- Finish by clicking Send Invitation.
- The invited user will be able to set up their own MFA and manage their own notifications.

**Invite User**

**User Information**

First Name

Last Name

\*Email

Purpose

**Phone Number**

Country/Region

Area/City

Local

Extension

**Permissions**

**Customers**

All

Admin

Orders

All

Restricted Access to Orders

Invoices

Catalogs

Profiles

ASNs

Service Sheets

All

Restricted Access to Service Sheets

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Private and Public

Hidden, Private, and Public

Order Line Confirmation

Forecast Planner

Workers

View

Manage

Worker Assignments

View

Manage

# Creating Legal Entities

# Creating Legal Entities (1 of 2)



Legal Entities are used to manage payment information and may have one or more Remit-To address and/or Ship From address attached. Legal Entity details will automatically populate on invoices once created.

- Legal Entities are best managed through the Business Profile page.
- Use the Quick Links to access the Legal Entities table.
- Suppliers may be prompted to enter the MFA code from either the app or SMS.
- Click **Create**.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', 'JONITEST', 'NOTIFICATIONS 2', and 'HELP'. Below this is a main navigation bar with 'Business Profile' highlighted. A secondary navigation bar contains 'Business Profile', 'Legal Entities', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area is titled 'Legal Entities' and features a 'Create' button, a search bar, and a table of existing legal entities.

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
<a href="#">CSP Creation ...</a>	1254 Havana Street, Denver, CO, 80251, United States	None	Check	1254 Havana Street, Denver, CO, 80251,...	None
<a href="#">Joni's Test Sup...</a>	1205 Havana Drive, Denver, CO, 80251, United States	None	Check	1205 Havana Drive, Denver, CO, 80251,...	CenterPoint Energy

Per page 5 | 10 | 20

# Creating Legal Entities (2 of 2)



Follow the prompts to complete legal entity setup.

- Legal Entity name must be the full legal business name, not the DBA (doing business as) name.
- Select Country/Region where the business is registered.
- Complete Tax Registrations. VAT ID will display for non-US entities instead of Tax ID.
- Complete Invoice From Address.
- Click **Save**.

**Create Legal Entity** [X]

\* Legal Entity Name: Supplier Webinar Demo

\* Country/Region: United States

**Tax Registrations**

\* Country/Region: [Dropdown]

VAT ID: [Text Field]

[Add Tax Registration](#)

**Invoice From Address** [^]

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

\* Country/Region: United States

\* Address Line 1: [Text Field]

Address Line 2: [Text Field]

\* City: [Text Field]

\* State: [Dropdown]

Invoice From Code: [Text Field]

Preferred Language: English (US)

**Ship From Address** [^]

Please enter the physical address that your goods are shipped from? This can be a warehouse address.

Same as Invoice From Address



Your Legal entity setup is now complete. If you would like to add new Payment Methods to this Legal Entity which your customers can use to pay you, please click continue below.

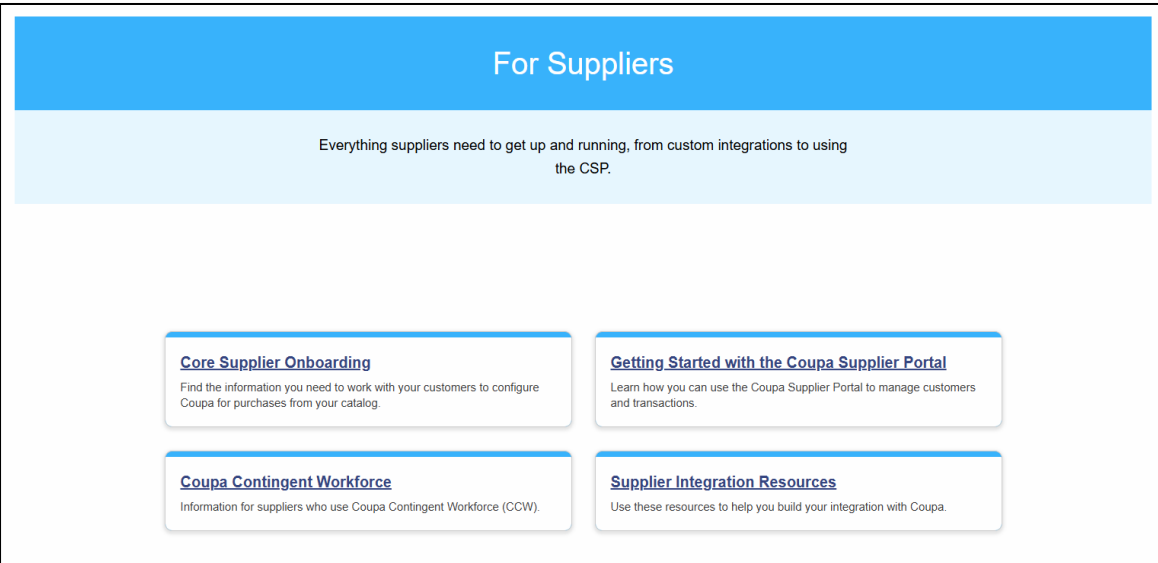
[Close](#) [Continue](#)

# Additional Resources

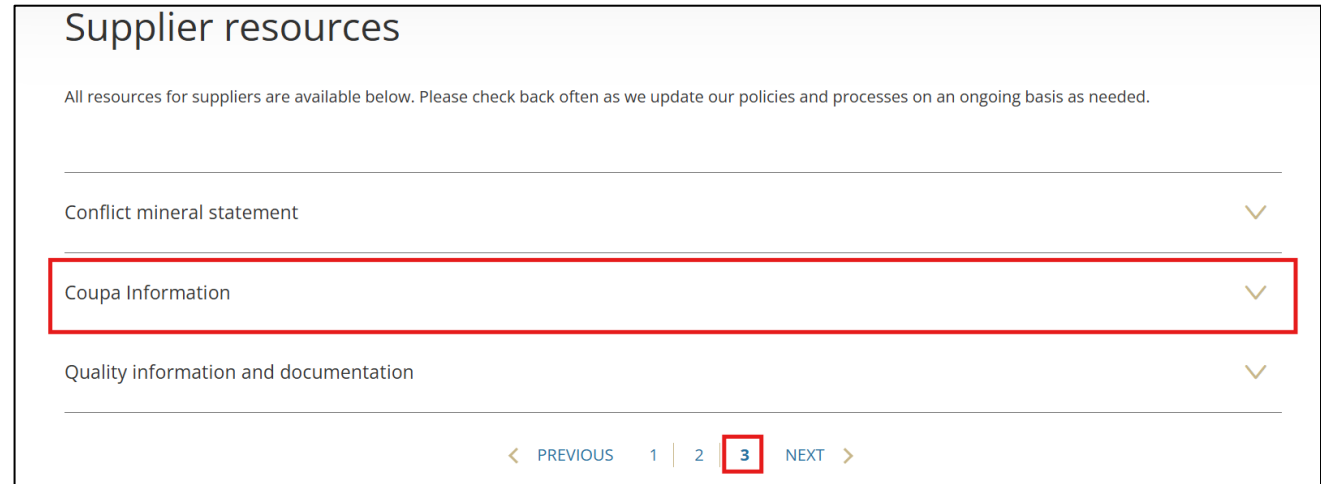
# Additional Resources



- For more information about the Coupa Supplier Portal please visit Coupa Compass:
  - <https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers>
- On our website, there is a Coupa FAQ document. Note that it is on the 3rd page of the supplier resources section of the linked page:
  - <https://www.corporate.jeld-wen.com/about-us/partnering-with-us>
- Email [supplierrelations@jeldwen.com](mailto:supplierrelations@jeldwen.com) with any questions regarding Coupa.



Coupa Compass



Where to find Coupa FAQ on JELD-WEN Partnering with Us page

**Q&A**

**Thanks!!**