Coupa Supplier Portal (CSP) Training
Calpine Suppliers

Training Purpose

This training introduces navigation of Coupa for Calpine Suppliers.

By the end of this session, you will be able to:
- Log in and navigate the Coupa Supplier Portal.
- Receive and acknowledge POs.
- Request a PO change.
- Submit invoices to Calpine.
- Submit an invoice from email.
- See invoice status.

Agenda

- **Getting Started** ⭐
- Navigation
- Purchase Orders
- Bidding
- Shipping
- Invoicing
- Support

Getting Started: What's Changing?

Key Changes

- ✓ All changes in quantity and price of PO will need to go through Coupa.
- ✓ Shipping, handling and miscellaneous charges will be on the header fields.
- ✓ All Coupa-related invoices must be sent electronically.
- ✓ You will be able to see status of POs and Invoices in the CSP.

Not Changing

- X Your contract terms.
- X Your key contacts with our team.
- X Your relationships with our team.

Getting Started: Coupa Supplier Portal

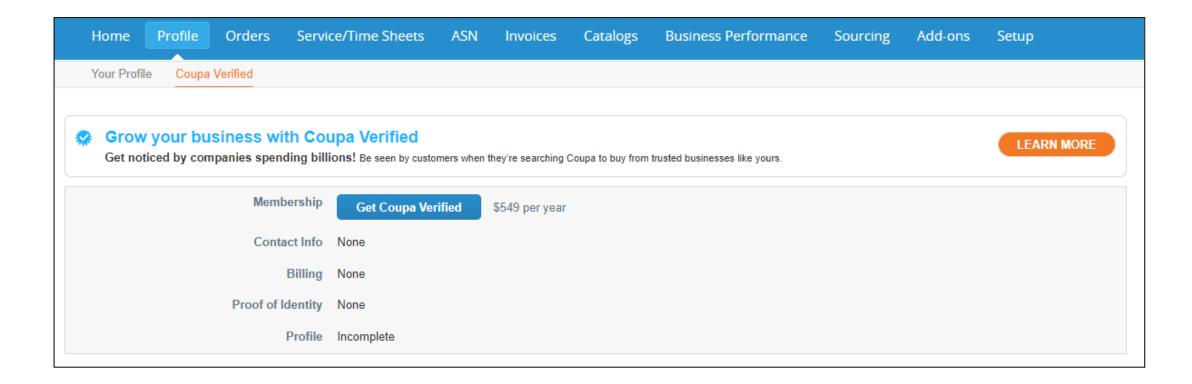The Coupa Supplier Portal (CSP) is a free tool for you to easily do business with Calpine. It allows you to:

- Manage your company information.
- Configure your company PO transmission preferences.
- Create and manage online catalogs.
- View, acknowledge and add shipment tracking to POs from Calpine.
- Flip POs and send invoices directly in Coupa to Calpine.
- Create credit notes.
- Monitor your payment status with full transparency.

Note: CSP can be accessed [here](#)

Getting Started: Coupa Verification

CALPINE DOES NOT REQUIRE COUPA VERIFICATION ($549). You DO NOT need to be Coupa Verified to transact with Calpine. Creating a Coupa Supplier Portal Account is free of charge.

Getting Started: Coupa Supplier Portal Invite

- You will receive an invitation to join the Coupa Supplier Portal.

- To join, click on **Join and Respond**.

- If you have not received the invite, or have any questions please email **suppliersupport@calpine.com**. We are happy to walk you through any difficulties you may face during this process.

Congratulations! You have been selected to register on the Coupa Supplier Portal (CSP) to do business with Calpine. Coupa is the purchasing and payment system Calpine will use to transact with all Suppliers.

Coupa will be free of cost for you as a Supplier. There are no licensing or transaction-level fees.

Here's how to register:

CSP Registration
To get started, simply click the registration link below. If you already use the CSP, you will simply need to connect Calpine Corporation to your CSP profile via the link provided below and complete the Supplier Information Management (SIM) forms specific to Calpine Corporation on the CSP site.

The New Way of Working Together
Your registration on CSP will enable Calpine to issue purchase orders, receive invoices and issue payments electronically. Benefits of the CSP to you include:

- Ability to manage your company information directly.
- Flexibility to configure your company's transaction notification preferences.
- Ability to easily create electronic invoices.
- Quick access to POs, invoices and payment status.

Need Help?
Please see the Calpine website for help completing the SIM form and the training schedule in August. If you have further questions or need registration assistance, contact suppliersupport@calpine.com.

If you are not the correct contact for this request, please forward this email to the appropriate individual.

Please Note: Registration with Coupa will be a requirement for all Suppliers to transact with Calpine. After registration, please continue to do business with Calpine as usual until October 18.
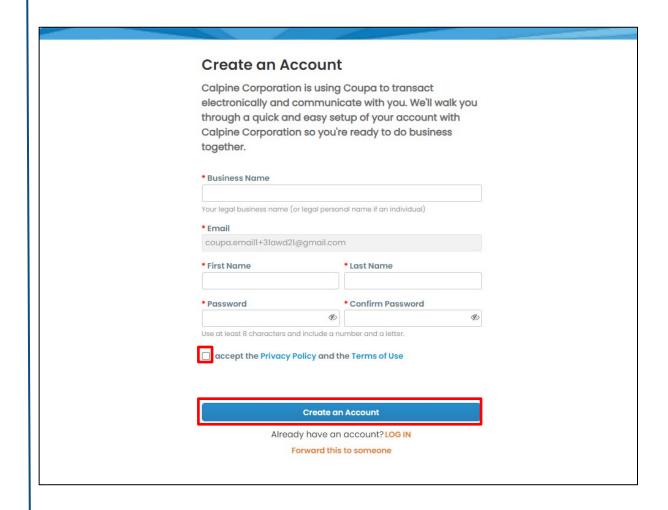
Thank You
Thank you in advance for registering in the CSP. We are excited to begin working together using Coupa.

Join and Respond
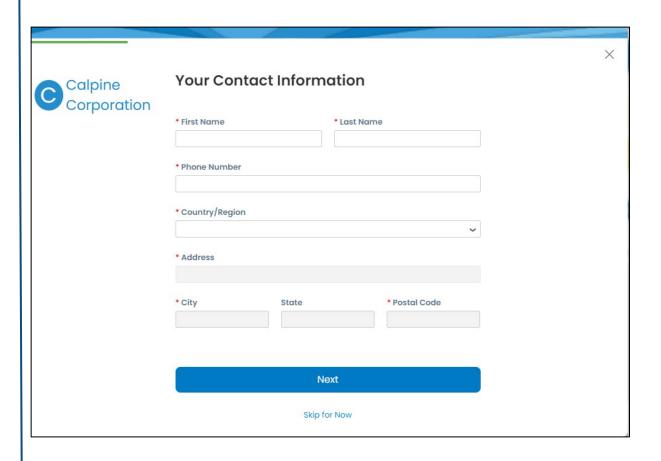
Getting Started: Coupa Supplier Portal Invite

- Once you've clicked "**Join and Respond**" in the invite, you will be directed to the Coupa Supplier Portal (CSP) homepage, where you will set up a new account.

- Create a **password** and **accept Coupa's Privacy Policy and the Terms of Use**.

- Click "**Create an Account**" to continue.

- If you are not the correct person to fill out the profile and need to forward the invite to someone at your company, click "**Forward this to someone**."

- **If you already have a Coupa account, click "Log in."**

Create an Account

Calpine Corporation is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Calpine Corporation so you're ready to do business together.

* Business Name

Your legal business name (or legal personal name if an individual)

* Email

coupa.email1+31awd21@gmail.com

* First Name   * Last Name

* Password   * Confirm Password

Use at least 8 characters and include a number and a letter.

☐ accept the Privacy Policy and the Terms of Use

Create an Account

Already have an account? LOG IN

Forward this to someone

Getting Started: Coupa Supplier Portal Invite

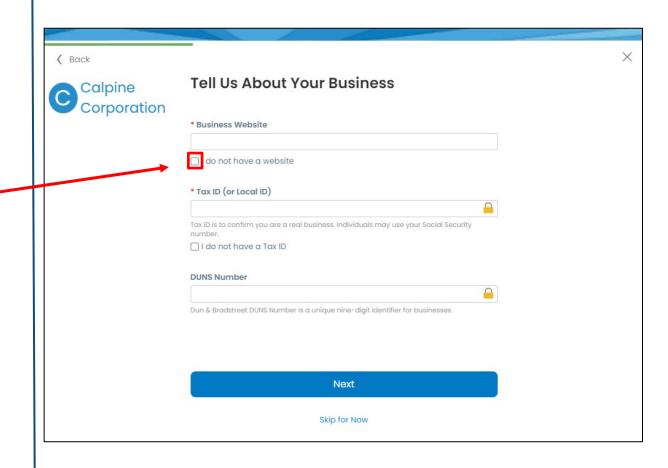## Supplier Contact Information

- Once you have clicked the "Create an Account" button, you will be forwarded to the "Your Contact Information" screen where you will enter your contact information.

- Supplier Contact Information - Confirm the information entered is correct. This is the primary contact/individual that owns the relationship with Calpine.

- Address - Enter the address of your company headquarters.

Getting Started: Coupa Supplier Portal Invite

Business Information

- The next screen that appears is the "**Tell us about your business**" screen where you will enter your company's information. This information is for your public CSP profile.

- **Business Website** – The URL for the website of your business. If your business does not have a business website, check the box indicating this.

- **Tax ID** – Enter your company's EIN or SSN **(excluding dashes)** as shown on your W9. You will be entering your Tax ID on the SIM form, so it is not required here.

- **DUNS Number** – D&B 9-digit number that identifies your business, if applicable.

- Click "**Next**" once you've entered the required information.

< Back

Calpine Corporation

Tell Us About Your Business

* Business Website

☐ do not have a website

* Tax ID (or Local ID)

Tax ID is to confirm you are a real business. Individuals may use your Social Security number.

☐ I do not have a Tax ID

DUNS Number

Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.

Next

Skip for Now

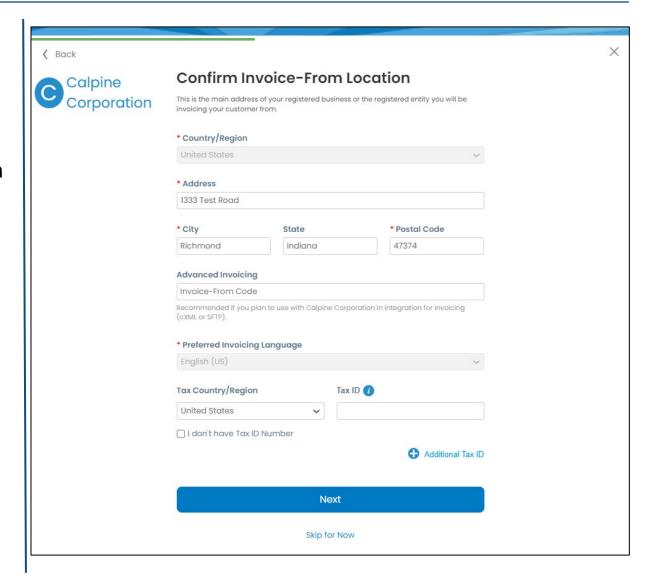# Getting Started: Coupa Supplier Portal Invite

Invoice-From Location

Input your Invoice-From Location Address. This is the location from which you will bill Calpine.

- **Tax ID** – Please provide only tax identification information that is in public domain.

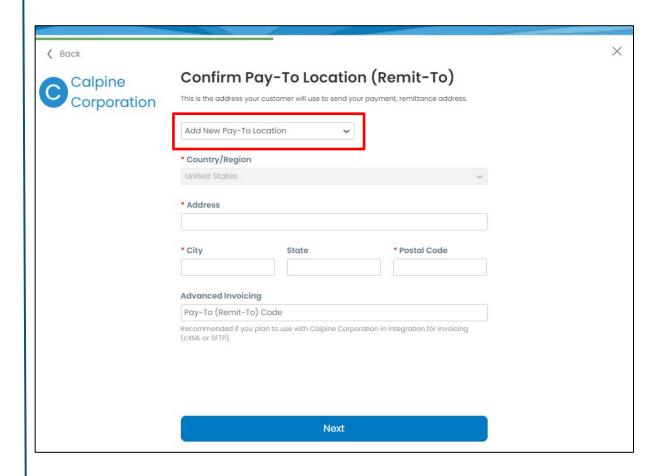- Once you have filled in all the required information, click "**Next**."

Getting Started: Coupa Supplier Portal Invite

Remit-to Location

Where your bank is located determines what information is required within the Remit-to-Address section. This is the location where Calpine will submit payments.

If you would like to use your Invoice-From address, you can select it from the dropdown menu.

- Once you have filled in all the required information, click "**Next**."

Getting Started: Coupa Supplier Portal Invite
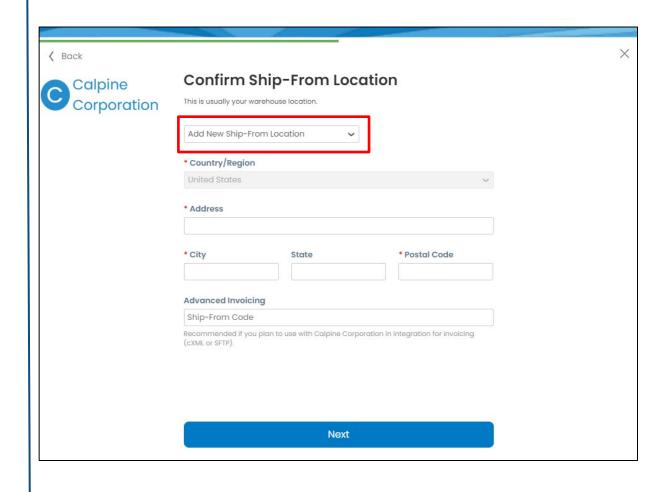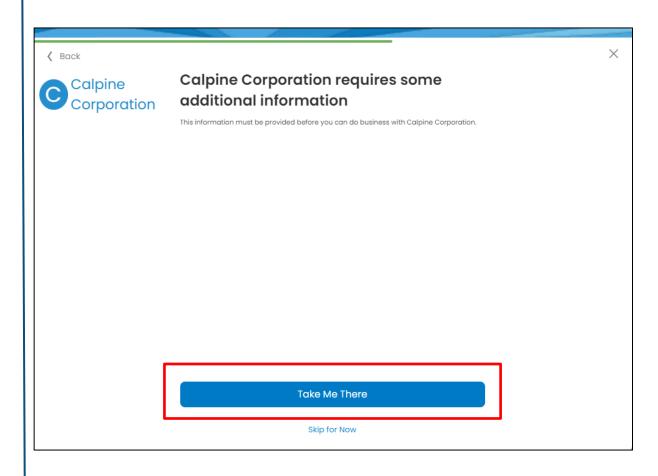
Ship-From Location

Enter the primary location where you are shipping goods from. If you need to add multiple locations, you can do so later.

If you would like to use your Invoice-From address, you can select it from the dropdown menu.

Getting Started: Coupa Supplier Portal Invite
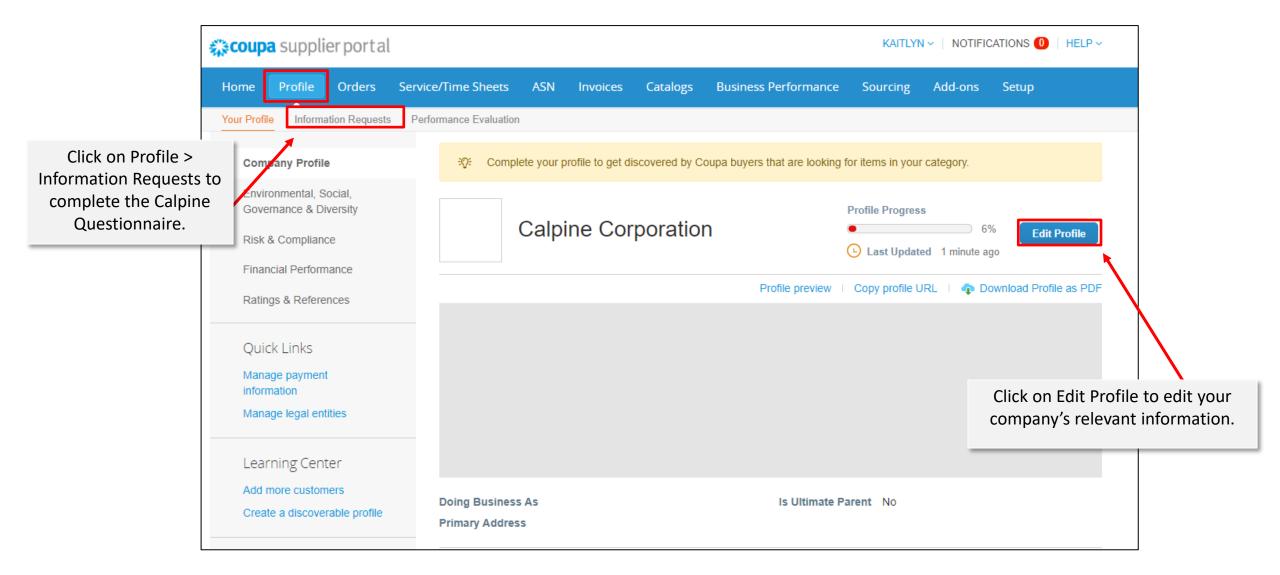
- Once you've completed the initial profile set up, you now are ready to complete the Calpine Supplier Questionnaire.

- Click "**Take Me There**" to open the Supplier Questionnaire.

Getting Started: Coupa Supplier Portal Invite

Click on Profile > Information Requests to complete the Calpine Questionnaire.

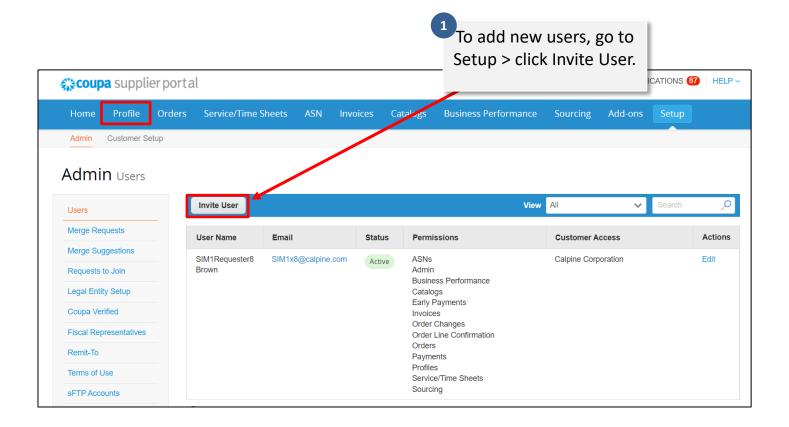Click on Edit Profile to edit your company's relevant information.
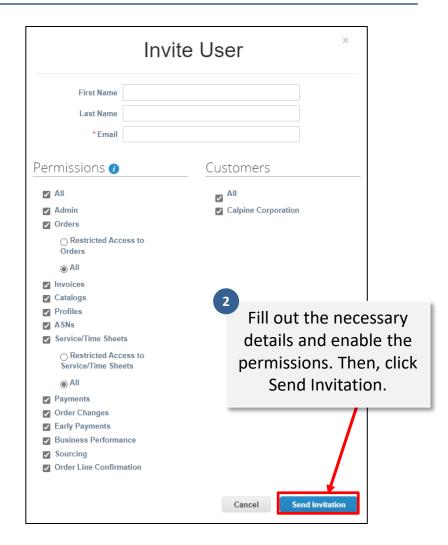
Getting Started: Coupa Supplier Portal Additional Invitations
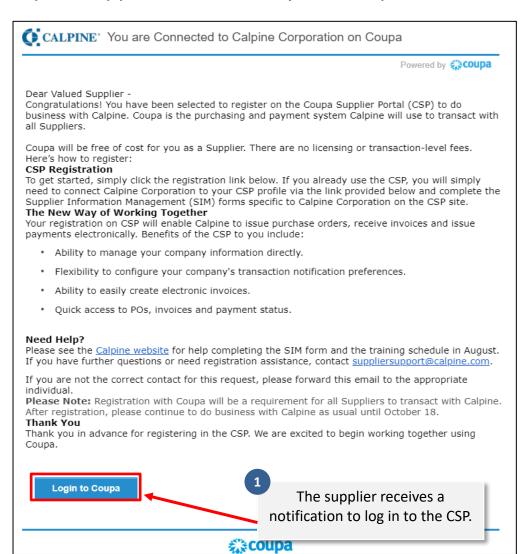
- If you have multiple locations or have multiple individuals handling orders and payments, you can add additional users to your CSP account.

1 To add new users, go to Setup > click Invite User.

2 Fill out the necessary details and enable the permissions. Then, click Send Invitation.

Getting Started: Coupa Supplier Portal Linkage
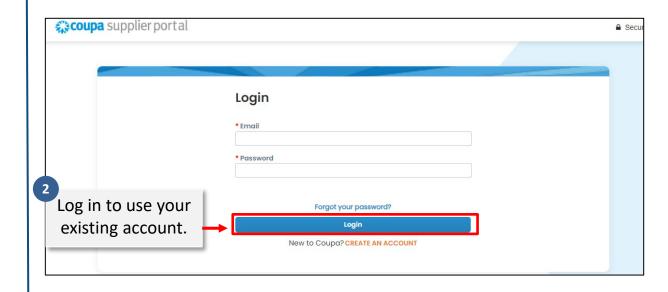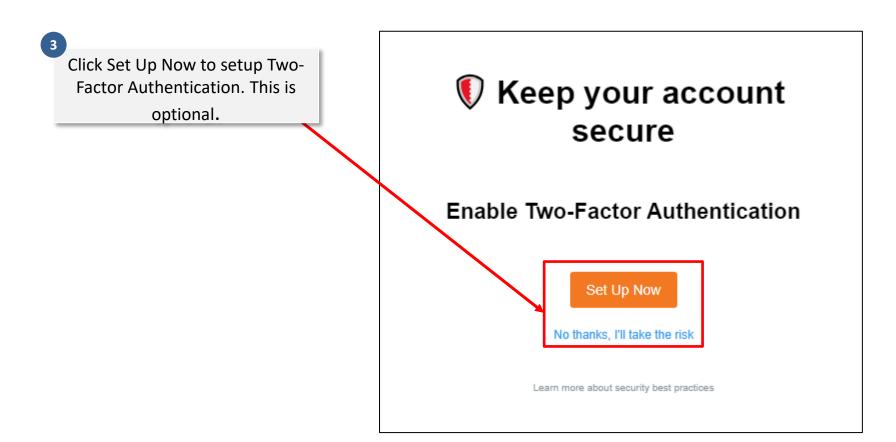
For Calpine Suppliers who already use Coupa. This is how you can link your current Coupa account to Calpine.
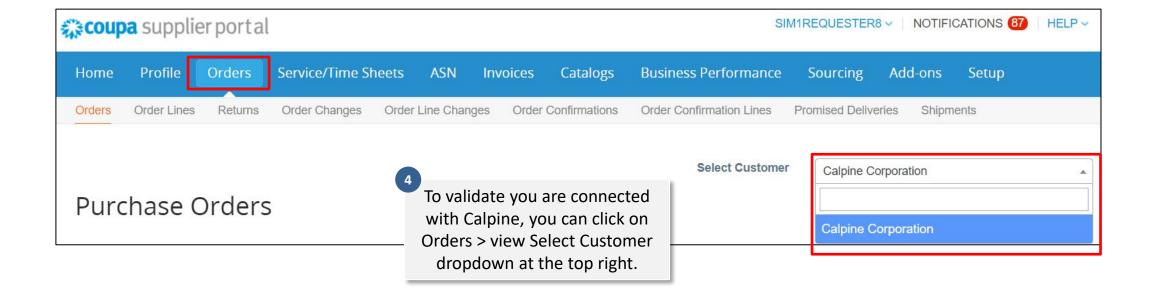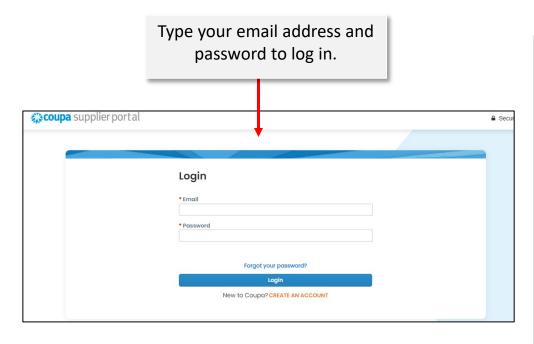
1 The supplier receives a notification to log in to the CSP.

2 Log in to use your existing account.

Getting Started: Coupa Supplier Portal Linkage

3

Click Set Up Now to setup Two-Factor Authentication. This is optional.

Getting Started: Coupa Supplier Portal Linkage

4 To validate you are connected with Calpine, you can click on Orders > view Select Customer dropdown at the top right.

COMPANY CONFIDENTIAL

Agenda

PROJECT STREAM
ENABLING LASTING EFFICIENCY

- Getting Started
- **General Navigation** ⭐
- Purchase Orders
- Bidding
- Shipping
- Invoicing
- Support

General Navigation: Edit Profile
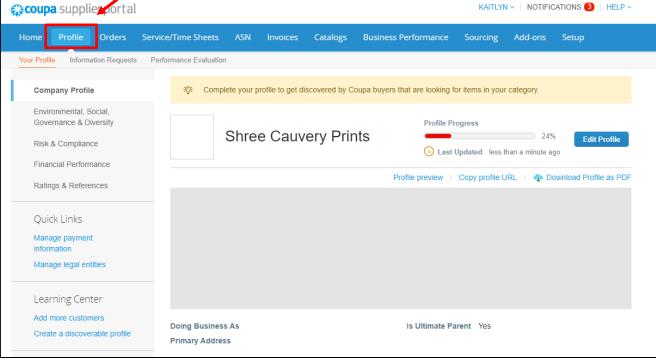
- To edit your Company's profile information or fill out the Calpine Supplier Questionnaire, log in to Coupa and click the Profile tab. The Calpine Supplier Questionnaire can be found under Profile > Information Requests.
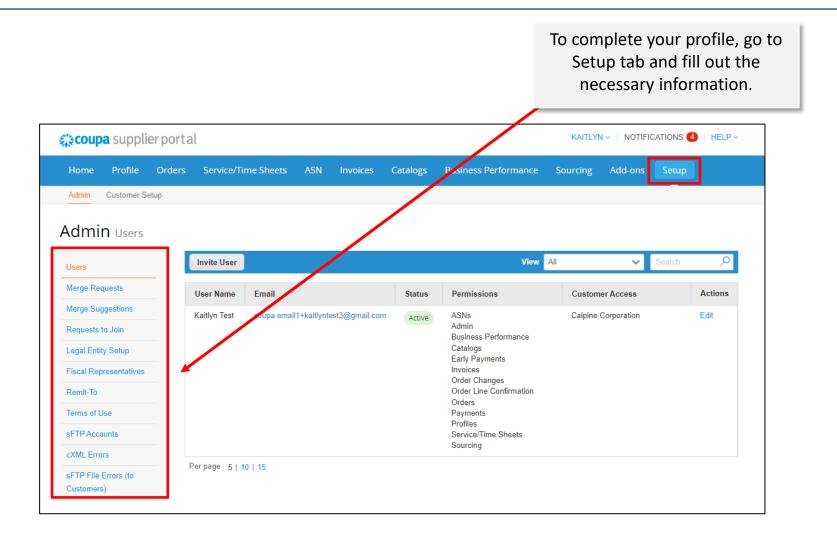
Click on Profile to complete your company's relevant information.

Type your email address and password to log in.

General Navigation: Edit Profile

To complete your profile, go to Setup tab and fill out the necessary information.

General Navigation: Coupa Tabs

Go to Orders tab to see all POs.

Invoices can be created against the PO by clicking the gold coins.

Orders, Order line, Order Changes and Order Line Changes can be viewed.
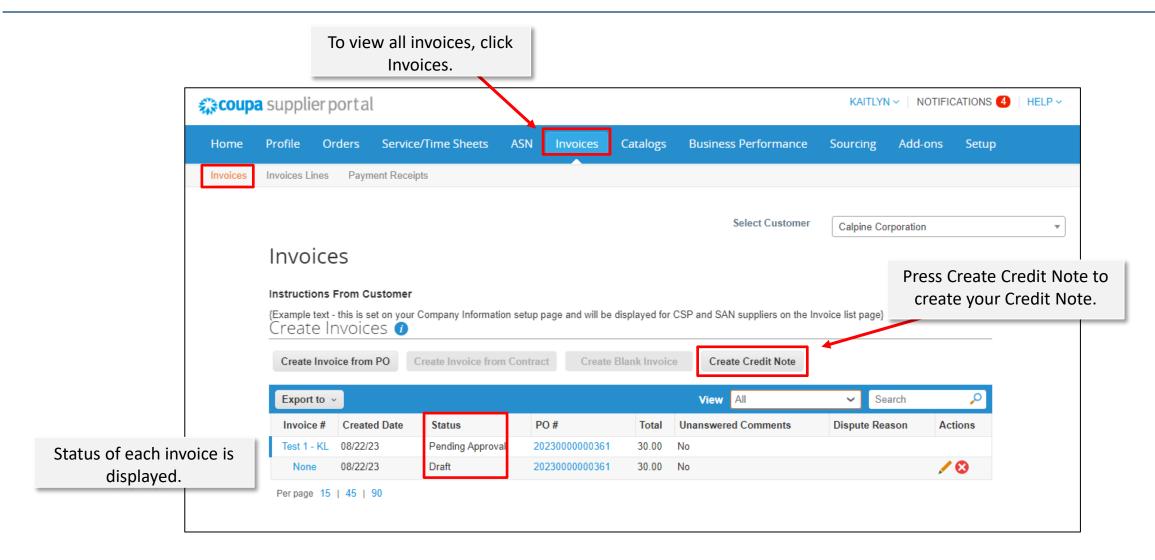
- General Navigation section is to help you become more familiar with Coupa tabs. More detailed information on POs/invoices can be found further in the document.

General Navigation: Coupa Tabs

To view all invoices, click Invoices.

coupa supplier portal

KAITLYN ⌄ | NOTIFICATIONS 4 | HELP ⌄

| Home | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogs | Business Performance | Sourcing | Add-ons | Setup |

Invoices   Invoices Lines   Payment Receipts

Select Customer   Calpine Corporation ▼

Invoices

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 Invoice list page}
Create Invoices ⓘ

Press Create Credit Note to create your Credit Note.

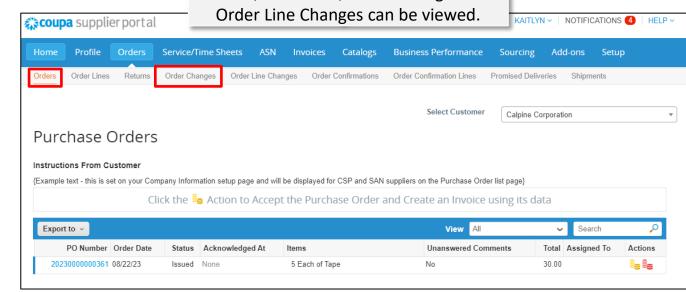| Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note |

| Export to ⌄ | | View All ⌄ | Search 🔍 |

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Test 1 - KL	08/22/23	Pending Approval	20230000000361	30.00	No		
None	08/22/23	Draft	20230000000361	30.00	No		🖉 ❌

Status of each invoice is displayed.

Per page 15 | 45 | 90

General Navigation: Manage Notifications

1 After logging in, click on Notifications.

2 To manage notifications, click Notification Preferences.

3 Click the type of notifications that you want to enable or disable.

General Navigation: Manage Notifications

You may receive notifications on the status of your invoices. Check the box to indicate your notification preference. Note: Online notifications will come directly through the CSP. Email notifications will go to the email on file.

Enable or disable notifications on cancelled and new POs, those with new comments or with rejected PO change requests.

Invoices

An invoice is abandoned	☑ Online	☑ Email	☐ SMS
Legal Invoice Export Ready	☑ Online	☑ Email	☐ SMS
An invoice is withdrawn from dispute	☑ Online	☑ Email	☐ SMS
An invoice is disputed	☑ Online	☑ Email	☐ SMS
An invoice is paid	☑ Online	☑ Email	☐ SMS
An invoice is approved	☑ Online	☑ Email	☐ SMS
A new comment is received	☑ Online	☑ Email	☐ SMS

Orders

An order is canceled	☑ Online	☑ Email	☐ SMS
A new order is received	☑ Online	☑ Email	☐ SMS
A new comment is received	☑ Online	☑ Email	☐ SMS

Order Header Changes

Order change request is rejected	☑ Online	☑ Email	☐ SMS

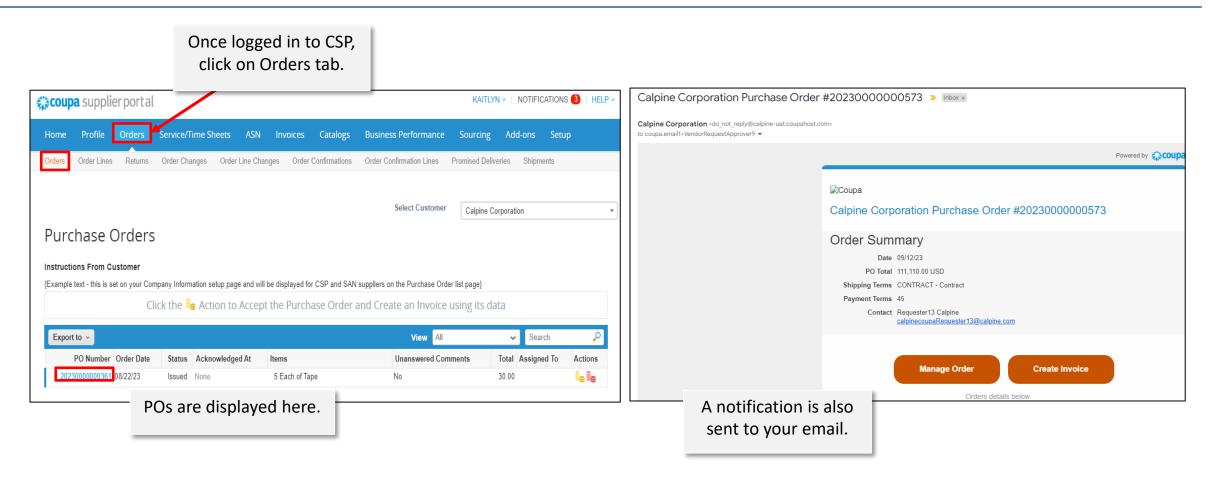Cancel   Save

4 Click Save.

Agenda

- Getting Started
- General Navigation
- **Purchase Orders** ★
- Bidding
- Shipping
- Invoicing
- Support
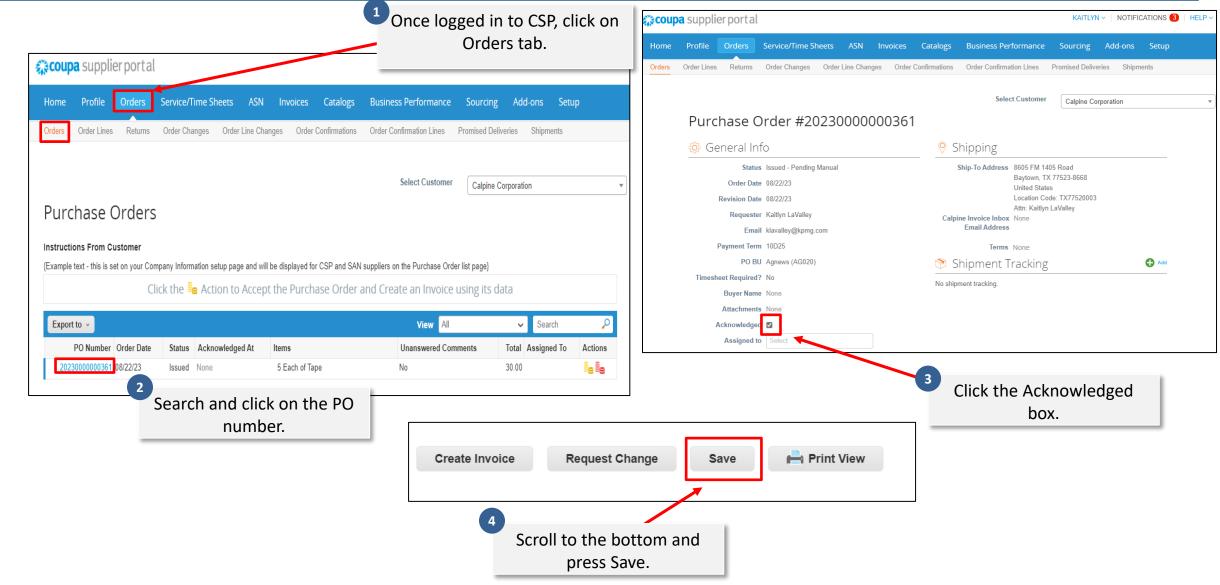
Purchase Orders: Reviewing Purchase Orders

Once logged in to CSP, click on Orders tab.

POs are displayed here.

A notification is also sent to your email.
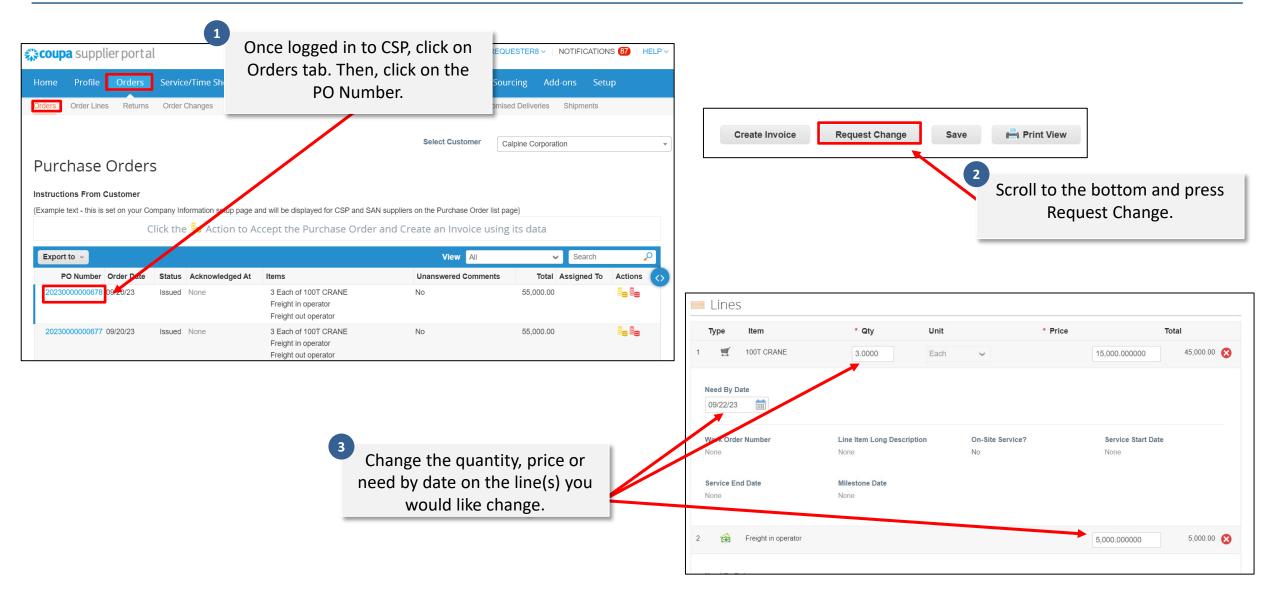
Purchase Orders: Acknowledging Purchase Orders

1 Once logged in to CSP, click on Orders tab.

2 Search and click on the PO number.

3 Click the Acknowledged box.

4 Scroll to the bottom and press Save.

Purchase Orders: Submitting a Purchase Order Change

1 Once logged in to CSP, click on Orders tab. Then, click on the PO Number.

2 Scroll to the bottom and press Request Change.

3 Change the quantity, price or need by date on the line(s) you would like change.

Purchase Orders: Submitting a Purchase Order Change

4 Scroll to the bottom and select your reason for change.
Note: if you select "other," a comment is required.

* Reason for Change

[dropdown]

- Cannot fulfill order quantity/amount
- The ordered item is no longer available
- Cannot fulfill orders by the Need-by date
- Other

Cancel   **Request PO Cancellation**   **Save Change Request**   **Submit Change Request**
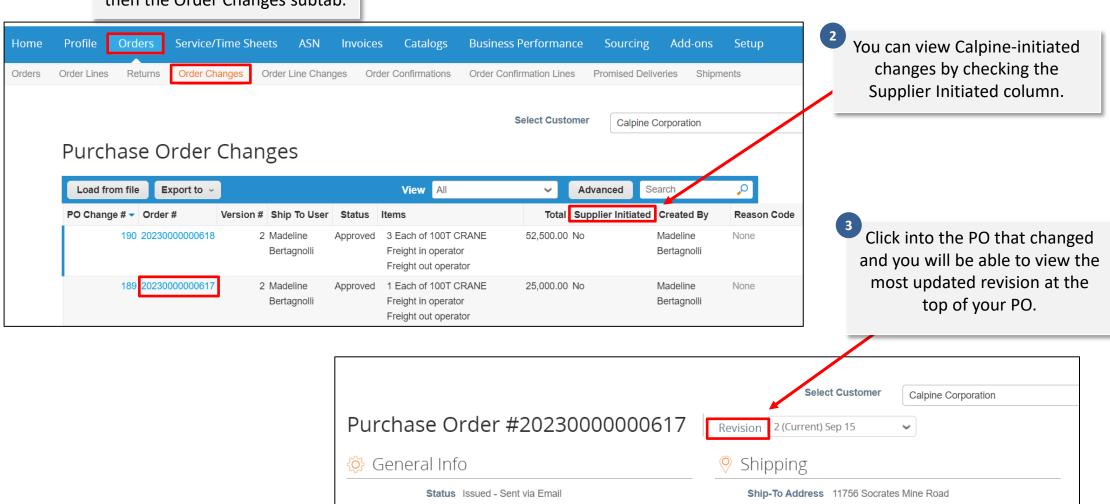
5 Press Submit Change Request.

Purchase Orders: Viewing Calpine-Initiated Purchase Order Changes

1 Navigate to the Orders tab and then the Order Changes subtab.

2 You can view Calpine-initiated changes by checking the Supplier Initiated column.

3 Click into the PO that changed and you will be able to view the most updated revision at the top of your PO.

Agenda

PROJECT STREAM
ENABLING LASTING EFFICIENCY

- Getting Started
- General Navigation
- Purchase Orders
- **Bidding** ⭐
- Shipping
- Invoicing
- Support

Bidding

1 Buyer notifies the event owner to participate in the event. Follow the instructions in the email to log in.

2 To view the event via email, click View Event.

2 To view the event via CSP, click on the event number.

Bidding

Bidding

Spot Bid from Req #1892 - Event #148 Active

Event Ends 14:07 days hrs

Event Info   My Response

📎 Attachments

APR1 Calpine has not provided any Attachments for this event

📄 Forms

APR1 Calpine has not provided any Forms for this event

☰ Items and Services

Name	My Capacity	Expected Qty	My Price	Price x Expected Qty ›
Items Not In Lots (1 items)				**0.0000** USD
🛒 Spot Bid		1.0000 (Each) ×		0.00 USD
			Total	**0.00** USD

Export to Excel | Import from Excel | Load History | Save | **Submit Response**

5 Click to edit the details.

▦ **Items Not In Lots (1 items)**   Event Ends 14:07 days hrs

Item Requested	Ship To	Item Details
🛒 Spot Bid	Baytown 8605 FM 1405 Road Baytown TX 77523-8668	

My Capacity	Expected Quantity	My Price *	Line Total
1.0000	1.0000 Each ×	4,250.00	4,250.00 USD

Your Item Name
Enter your item or service name

Lead Time
Lead Time   Days

ID/Part Number
Enter an ID or part number

Description
Enter your item or service description

Add Image

Add image in GIF, JPEG, or PNG formats

Attachments
Click to view

Form

Cancel | **Save Item**

Total 4,250.00 USD

Export to Excel | Import from Excel | Load History | Save | **Submit Response**

6 Enter the details such as price, item name, lead time, part number, description, picture or attach a file.

7 Submit your quote.

Agenda

PROJECT STREAM
ENABLING LASTING EFFICIENCY

- Getting Started

- General Navigation

- Purchase Orders

- Bidding

- **Shipping** ★

- Invoicing

- Support

Shipping
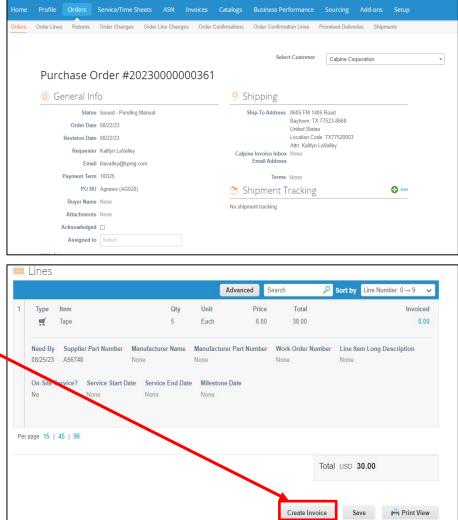
1 Once logged in to the CSP, click on Orders tab.

2 Search and click on the PO number.

3 Click on Add.

4 Complete the tracking details. Then, click on Save.

5 Scroll to the bottom and press Save.

Agenda

PROJECT STREAM
ENABLING LASTING EFFICIENCY

- Getting Started
- General Navigation
- Purchase Orders
- Bidding
- Shipping
- **Invoicing** ★
- Support

Invoicing: Invoice via the Portal

1 Click on Orders tab to view POs. Click on the PO number to view the PO.

Invoicing: Invoice via the Portal

2 Click on the gold coins to flip the PO into an invoice. OR click on the PO number and click "Create Invoice" at the bottom.

Invoicing: Invoice via the Portal

Select Customer Calpine Corporation
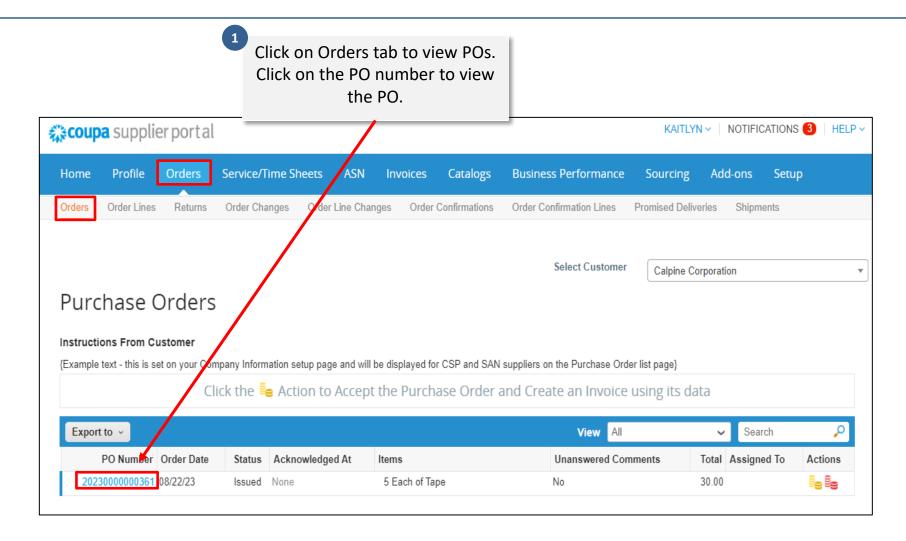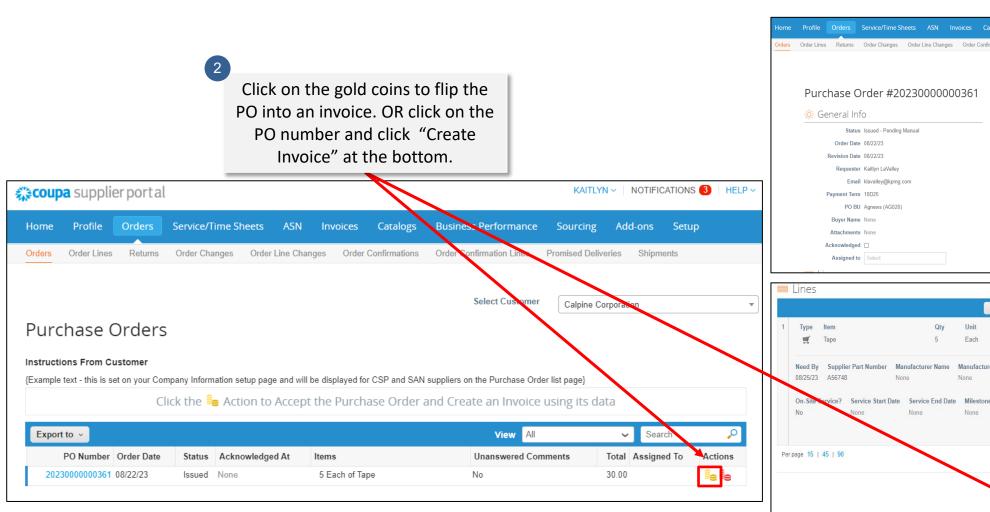
Create Invoice Create

⚙ General Info
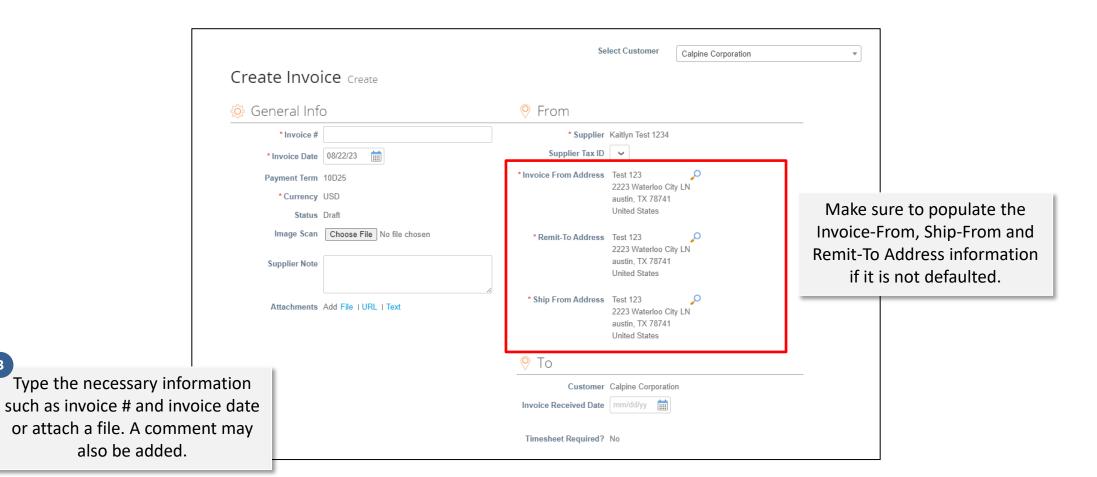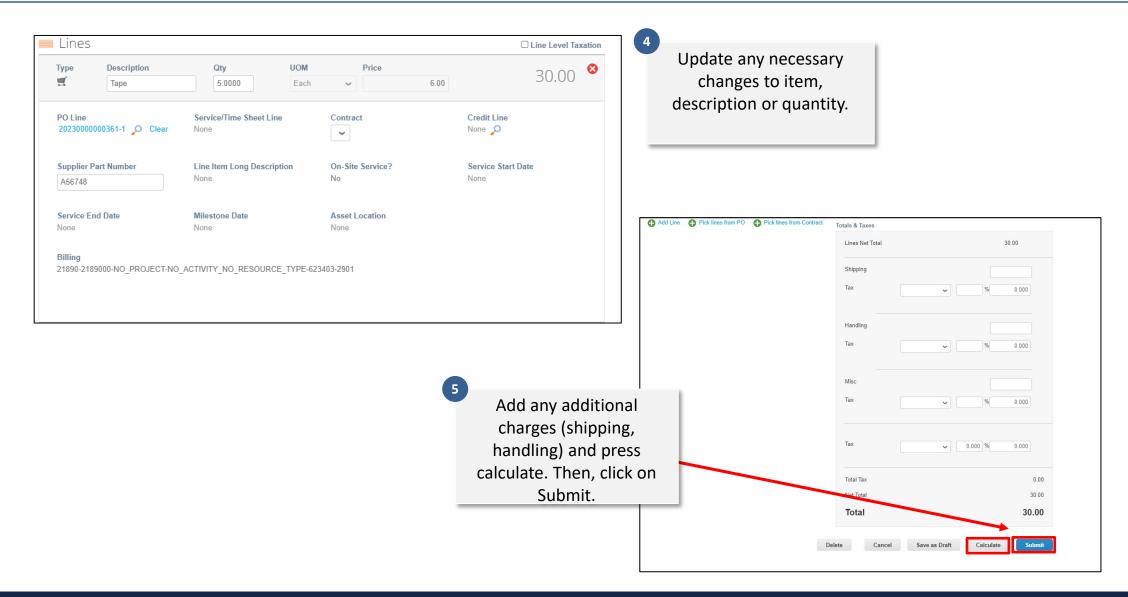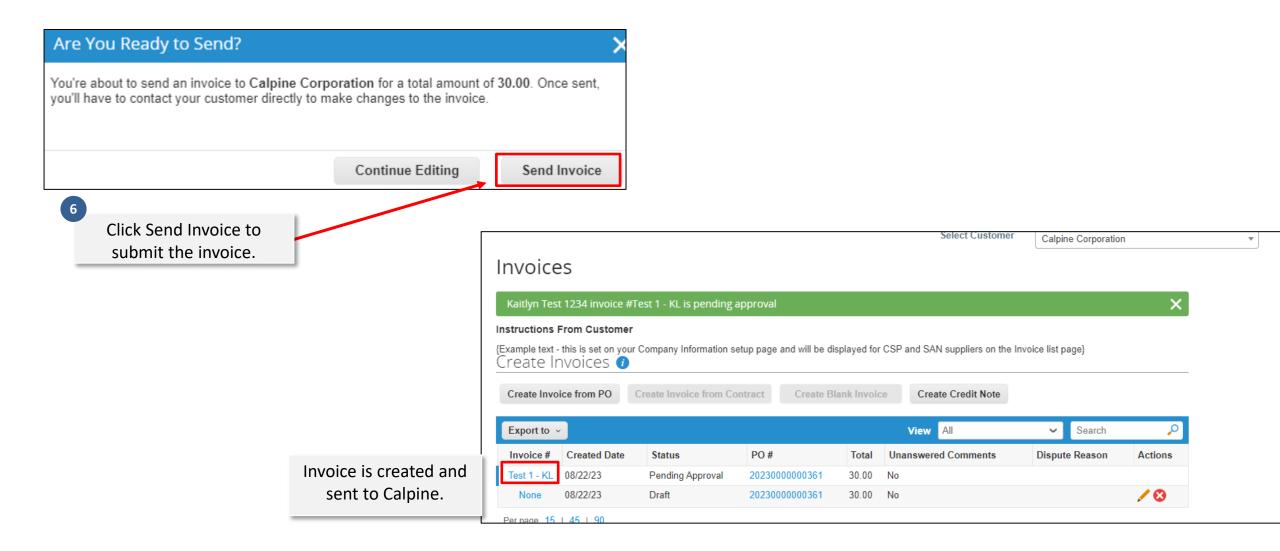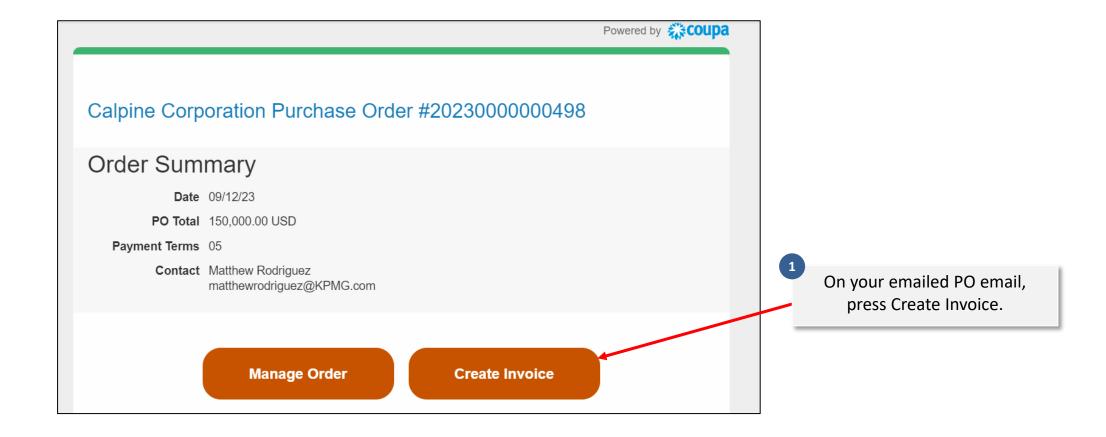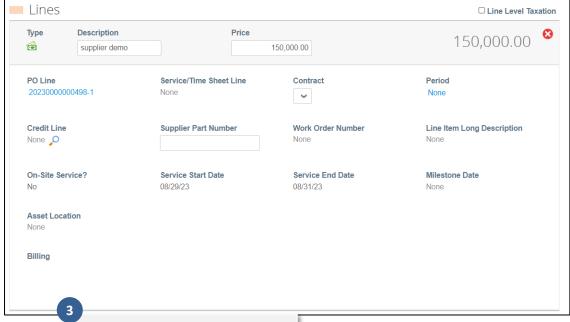
* Invoice #
* Invoice Date 08/22/23
Payment Term 10D25
* Currency USD
Status Draft
Image Scan Choose File No file chosen
Supplier Note
Attachments Add File | URL | Text

📍 From

* Supplier Kaitlyn Test 1234
Supplier Tax ID
* Invoice From Address Test 123
2223 Waterloo City LN
austin, TX 78741
United States

* Remit-To Address Test 123
2223 Waterloo City LN
austin, TX 78741
United States

* Ship From Address Test 123
2223 Waterloo City LN
austin, TX 78741
United States

📍 To

Customer Calpine Corporation
Invoice Received Date mm/dd/yy
Timesheet Required? No

Make sure to populate the Invoice-From, Ship-From and Remit-To Address information if it is not defaulted.

3 Type the necessary information such as invoice # and invoice date or attach a file. A comment may also be added.

Invoicing: Invoice via the Portal

4 Update any necessary changes to item, description or quantity.

5 Add any additional charges (shipping, handling) and press calculate. Then, click on Submit.

Invoicing: Invoice via the Portal

Are You Ready to Send?

You're about to send an invoice to **Calpine Corporation** for a total amount of **30.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing   Send Invoice

6 Click Send Invoice to submit the invoice.

Select Customer   Calpine Corporation

Invoices

Kaitlyn Test 1234 invoice #Test 1 - KL is pending approval

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 Invoice list page}

Create Invoices ⓘ

Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note

Export to ⌄   View [All ⌄]   Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Test 1 - KL	08/22/23	Pending Approval	20230000000361	30.00	No		
None	08/22/23	Draft	20230000000361	30.00	No		✏️ ❌

Per page 15 | 45 | 90

Invoice is created and sent to Calpine.

Invoicing: Invoice via Supplier Actionable Notification (SAN)

Powered by coupa

Calpine Corporation Purchase Order #20230000000498

Order Summary

Date 09/12/23

PO Total 150,000.00 USD

Payment Terms 05

Contact Matthew Rodriguez
matthewrodriguez@KPMG.com

Manage Order   **Create Invoice**

1 On your emailed PO email, press Create Invoice.

Invoicing: Invoice via Supplier Actionable Notification (SAN)

2 Type the necessary information such as Invoice # and Invoice Date or attach a file. A comment may be added.

Invoicing: Invoice via Supplier Actionable Notification (SAN)

3 Update any necessary changes to item, description or quantity.

4 Add any additional charges (shipping, handling) and press calculate. Then, click on Submit.
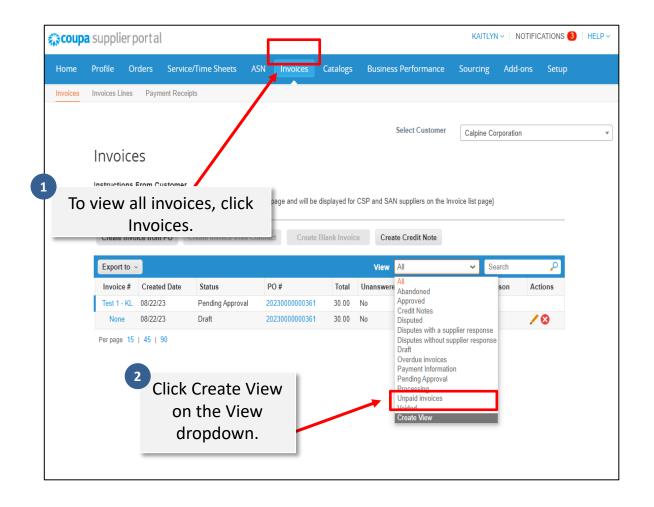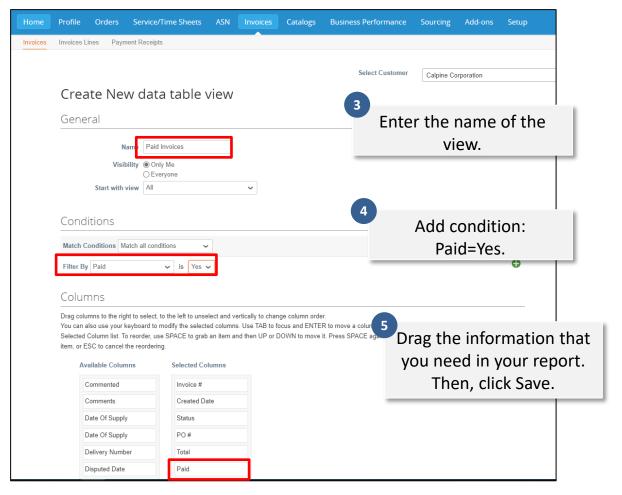
Invoicing: Invoice via Supplier Actionable Notification (SAN)

Are You Ready to Send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Continue Editing   **Send Invoice**

5 Click Send Invoice to submit the invoice.

Invoicing: Checking Invoice Paid Status

1 To view all invoices, click Invoices.

2 Click Create View on the View dropdown.

3 Enter the name of the view.

4 Add condition: Paid=Yes.

5 Drag the information that you need in your report. Then, click Save.

Invoicing: Checking Invoice Approval Status

1 To view all invoices, click Invoices.

Status of each invoice is displayed.

Agenda

PROJECT STREAM
ENABLING LASTING EFFICIENCY

- Getting Started
- General Navigation
- Purchase Orders
- Bidding
- Shipping
- Invoicing
- **Support** ★

Support

Coupa Resources

- **Coupa Supplier Portal (CSP) Videos**
- **Create or Edit an Invoice**
- **View and Manage Invoices**
- **Invoices FAQ**
- **Create an Invoice or Credit Note in the CSP (Video)**
- **Coupa Compass**
- **Coupa Supplier Launch Page**

Calpine Resources

- **Calpine Website**
- **For additional questions, email suppliersupport@calpine.com.**