



Coupa Supplier Information Session

Agenda for today

- ① **Overview of upcoming Coupa roll out**

- ② **Working with us in Coupa: CSP and email**

- ③ **Managing the transition: existing POs**

- ④ **Your most common questions answered**

- ⑤ **Next steps and support resources**



What is Coupa?



Integrated platform for sourcing, contracting, purchase orders and invoicing



Enables collaboration between buyers (FirstEnergy) and suppliers within the platform



Features a free Coupa Supplier Portal (CSP) for suppliers to interact with all customers using Coupa

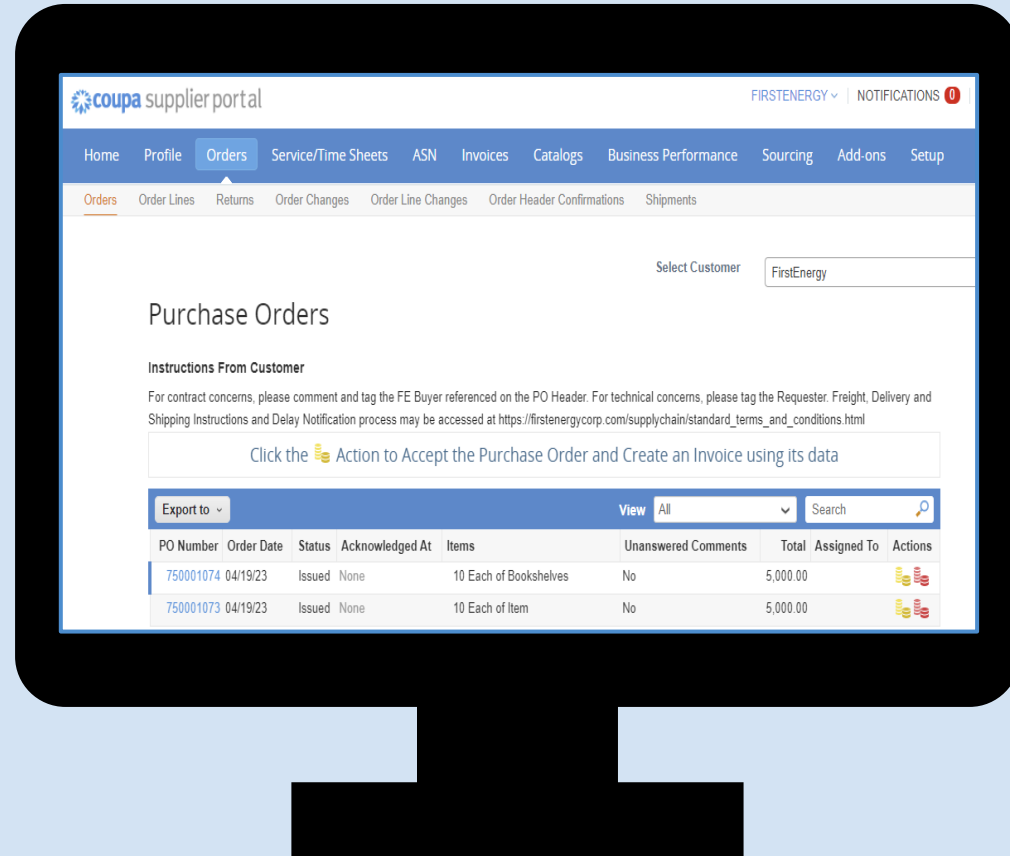


What you need to know now

- ✓ **FirstEnergy is transitioning purchase orders and invoicing to Coupa in the coming months (exact go-live date to be communicated soon)**
- ✓ **After the go-live date, suppliers must submit all invoices via Coupa e-invoicing channels; direct email (.pdf attached) and paper copies will no longer be accepted**
- ✓ **Coupa will benefit both FirstEnergy and suppliers through more automation and visibility into statuses**



What you need to do now: register for the CSP

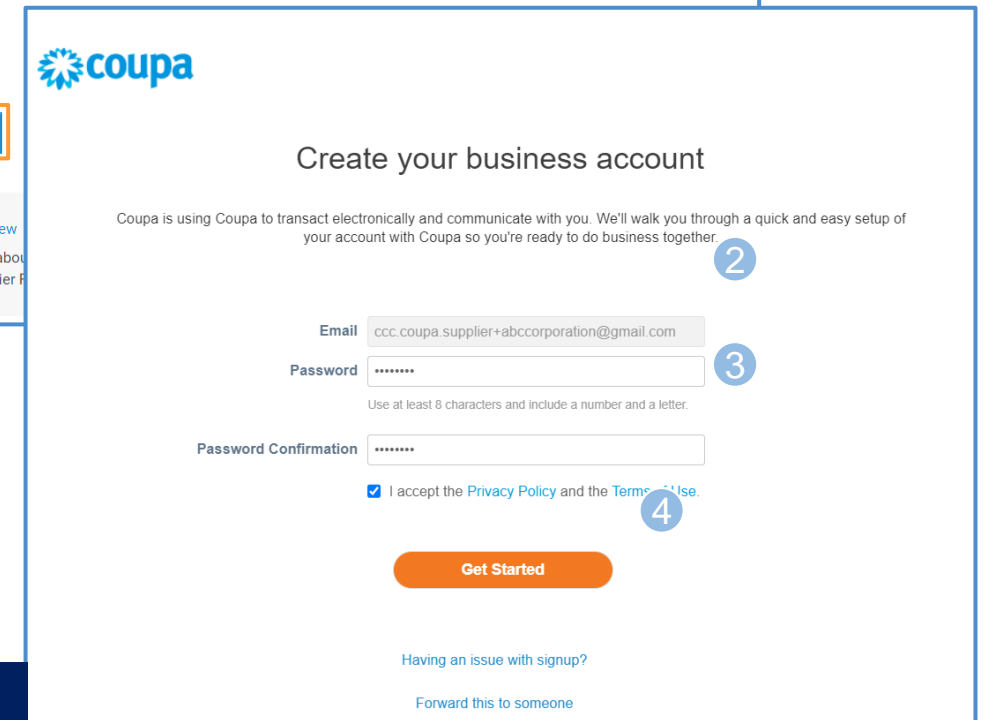
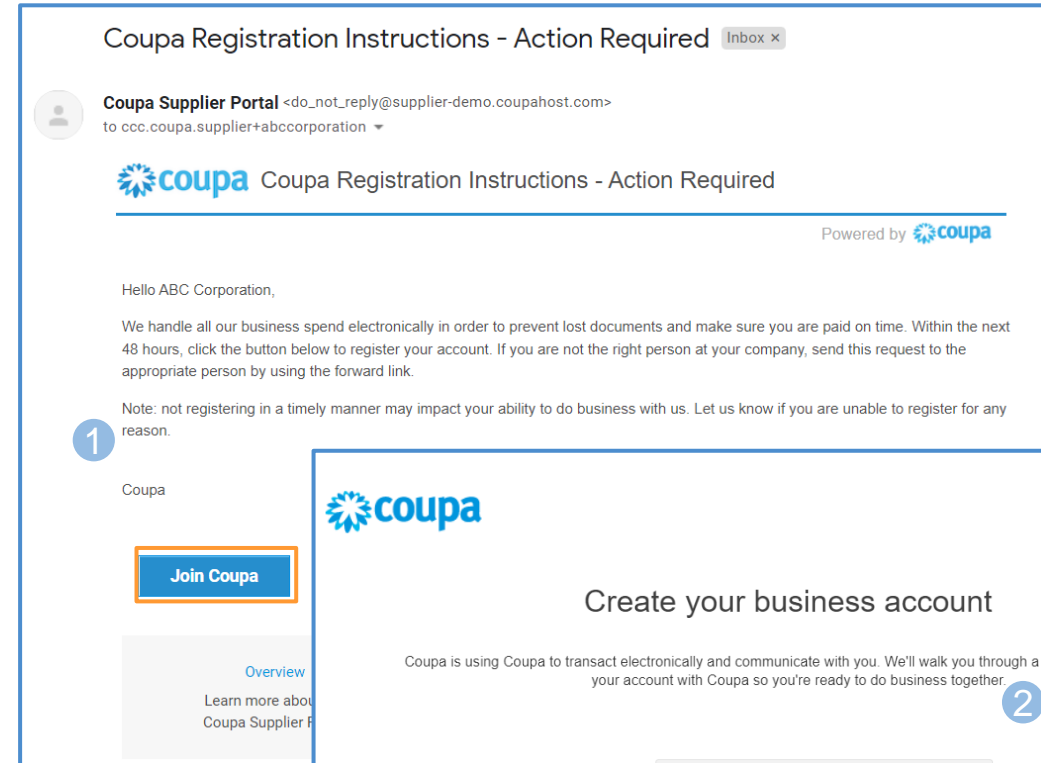


Register for the CSP when you receive your invitation

Suppliers will receive a CSP invitation with Subject:
Coupa Registration Instructions - Action Required

1. When you click on “**Join Coupa**” to sign up, Coupa will prompt you to join the Coupa Supplier Portal (CSP) by creating an account.
2. Email field is pre-populated with supplier email address on file.
*This email address can be updated once logged in
3. Set your **Password** and **Password Confirmation**.
4. Tick the “**I accept the Privacy Policy and Terms of Use**” and click **Get Started**.

Coupa will create your account and automatically direct you to your Coupa Supplier Portal page.



Invitations to the CSP expire after 30 days.


Note: Additional users can be invited by the primary supplier contact

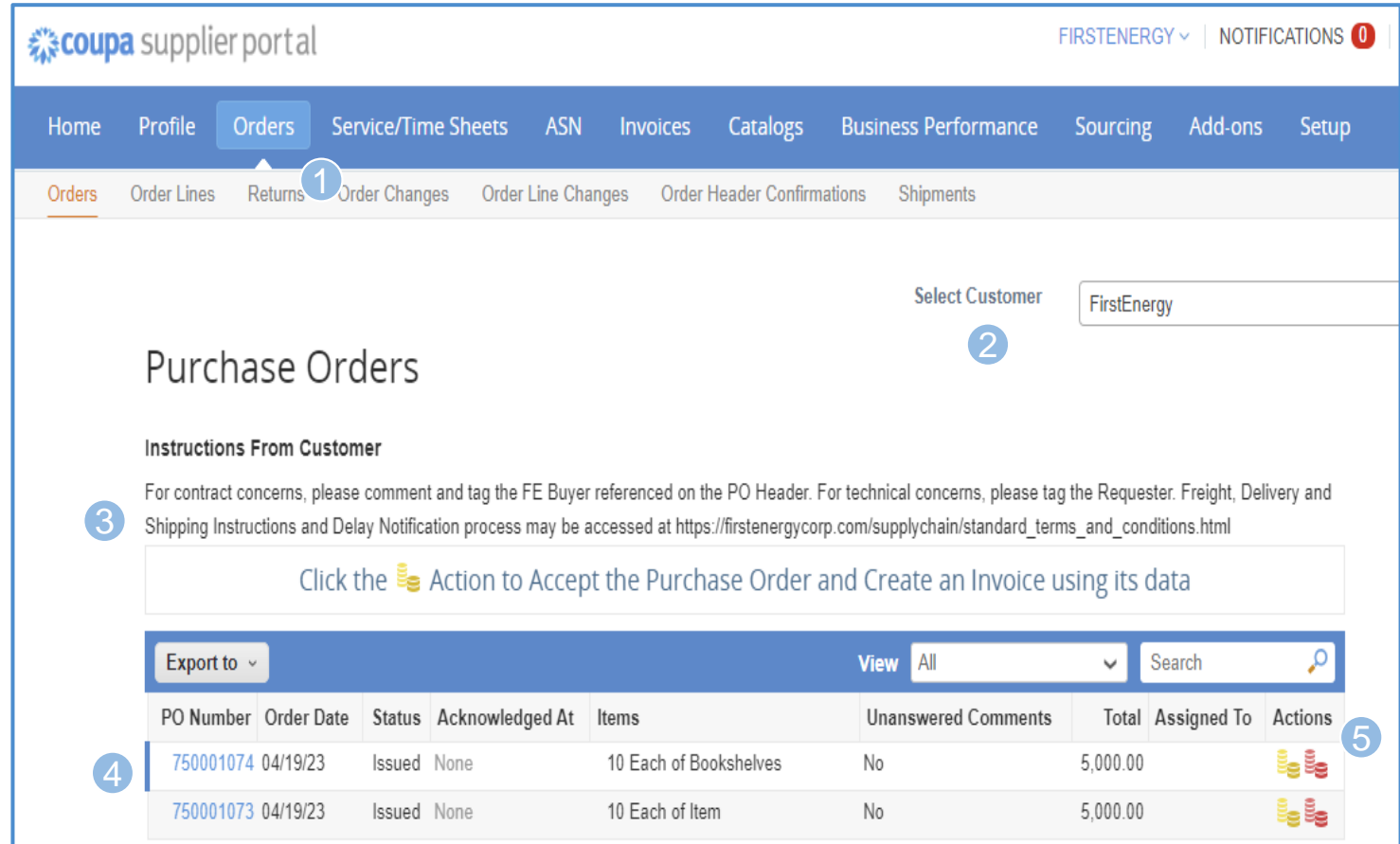
Once registered, you will be able to access any purchase orders

Suppliers can receive email and online notifications when a PO has been sent. To view all purchase orders in Coupa, log into the Coupa Supplier Portal (CSP) at **supplier.coupahost.com**

1. Go to the **Orders** tab
2. Select FirstEnergy as your **Customer**
3. Read the **instructions** provided by FirstEnergy
4. Click on the **blue** PO number to view POs created by FirstEnergy
5. Available **actions** on the PO are visible under the Actions column of the table

 - Create (flip the PO) into an invoice


 - Create a credit note







The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below this, a secondary navigation bar shows 'Orders' (highlighted), 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Header Confirmations', and 'Shipments'. The main content area is titled 'Purchase Orders' and shows 'Select Customer' as 'FirstEnergy'. Below this, there are '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', 'Assigned To', and 'Actions'. The first row is highlighted in blue, and the second row is also highlighted. The 'Actions' column contains icons for creating an invoice and a credit note.

Instructions From Customer

For contract concerns, please comment and tag the FE Buyer referenced on the PO Header. For technical concerns, please tag the Requester. Freight, Delivery and Shipping Instructions and Delay Notification process may be accessed at https://firstenergycorp.com/supplychain/standard_terms_and_conditions.html

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

| PO Number | Order Date | Status | Acknowledged At | Items | Unanswered Comments | Total | Assigned To | Actions |
|-----------|------------|--------|-----------------|------------------------|---------------------|----------|-------------|---|
| 750001074 | 04/19/23 | Issued | None | 10 Each of Bookshelves | No | 5,000.00 | |   |
| 750001073 | 04/19/23 | Issued | None | 10 Each of Item | No | 5,000.00 | |   |

You will also submit invoices via the CSP directly against lines in your purchase orders

Log into the Coupa Supplier Portal (CSP) at **supplier.coupahost.com** to create invoices and credit notes. You are required to provide invoice number, invoice date, pdf copy of your invoice and appropriate invoice-from, remit-to and ship-from address. These addresses are set up as part of the account setup.

1. In the **Orders** tab, click on the gold coin icon on the PO to create an invoice
2. Populate **Invoice #**, **Invoice Date** (defaults to invoice creation date) fields. Attach a pdf copy of your invoice to **Image Scan**
3. Check if the correct Invoice From, Remit-To and Ship From addresses are selected.
4. Confirm item lines
5. Populate other fields such as **Shipping** and **Miscellaneous**
6. Once invoice details are complete, click **Submit** and **Send Invoice**

FirstEnergy
Create Invoice Create

General Info From

* Invoice # * Supplier FirstEnergy Vendor
2 * Invoice Date 04/19/23 Supplier Tax ID
Payment Term 3027(within 25 days 2 % cash discount)within 60 days Due net * Invoice From Address FirstEnergy Vendor, 123 Main St, Chicago, IL 60101, United States 3
* Currency USD
Status Draft
* Image Scan No file chosen * Remit-To Address FirstEnergy Vendor, 123 Main St, Chicago, IL 60101, United States
Supplier Note

Lines Line Level Taxation

| Type | Description | Qty | UOM | Price | |
|------|-------------|-------|------|--------|----------|
| Item | | 10.00 | Each | 500.00 | 5,000.00 |

PO Line 750001073-1 Service/Time Sheet Line None Contract Period
Supplier Part Number SAP Taxable Flag Service Purchasing (Input) - Tax Exempt ERS Indicator No Serial Number(s)

SAP PO Classification Standard
Billing 550300-CC-T24000-1302-T24000-4

Totals & Taxes

| | |
|-----------------|---|
| Lines Net Total | 5,000.00 |
| Shipping | <input type="text"/> |
| Misc | <input type="text"/> |
| Tax | <input type="text"/> 0.000 % <input type="text"/> 0.000 |
| Total Tax | 0.00 |
| Net Total | 5,000.00 |
| Total | 5,000.00 |

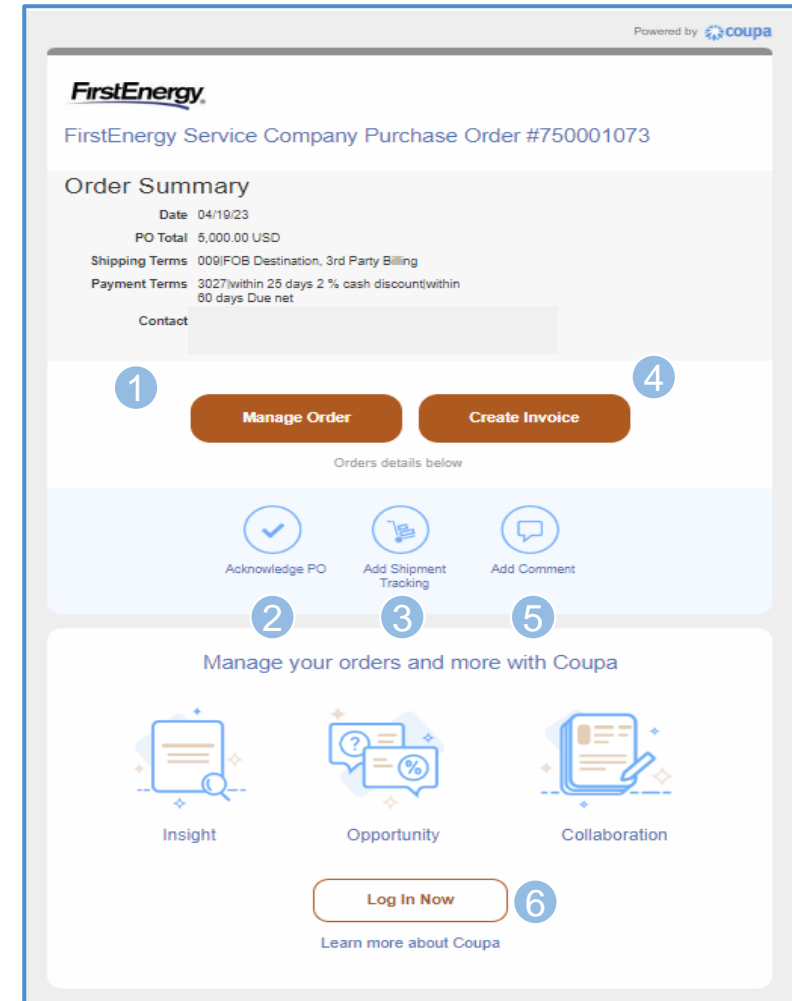
5 6

Delete Cancel Save as Draft Calculate Submit

Although the CSP is preferred method, you can also transact on Coupa using email...

Suppliers will receive an email from FirstEnergy with their Coupa purchase order. Suppliers will open the PO with **actionable buttons** via Supplier Actionable Notifications (SAN).

1. **Manage Order** – can be used to view the PO without invoicing.
2. **Acknowledge PO** – to acknowledge the PO.
3. **Add Shipment Tracking**
4. **Create Invoice** – to create invoice against the PO after shipment, delivery, or services rendered. Can partial or full invoice
5. **Add Comment** – use this feature to communicate with the requester
6. ***Log In Now** – to create a Coupa Supplier Portal (CSP) account
**We recommend creating a CSP account especially if you will need to submit multiple invoices against multiple POs over time. Having a CSP account allows you to save your profile information each time you need to submit an invoice, whereas SAN requires re-entry each time. The CSP also gives you the ability to review all of your POs and invoices on one screen vs. SAN for which you would need to review PO by PO.*



...including to submit invoices electronically against the purchase order received via email after shipment, delivery, or services rendered

Invoices will be created directly from the emailed PO. You are required to provide invoice number, invoice date, pdf copy of your invoice and appropriate invoice-from, remit-to and ship-from address. These addresses are set up as part of the account setup.

1. In the Coupa PO email, click on **Create Invoice**
2. Populate **Invoice #**, **Invoice Date** (defaults to invoice creation date) fields. Attach a pdf copy of your invoice to **Image Scan**
3. Check if the correct Invoice From, Remit-To and Ship From addresses are selected.
4. Confirm item lines
5. Populate other fields such as **Shipping** and **Miscellaneous**
6. Once invoice details are complete, click **Submit** and **Send Invoice**

FirstEnergy
Create Invoice Create

General Info From

* Invoice # * Supplier FirstEnergy Vendor

* Invoice Date 04/19/23 * Supplier Tax ID

Payment Term 3027|within 25 days 2 % cash discount|within 60 days Due net * Invoice From Address FirstEnergy Vendor
123 Main St
Chicago, IL 60101
United States

* Currency USD * Remit-To Address FirstEnergy Vendor
123 Main St
Chicago, IL 60101
United States

Status Draft

* Image Scan No file chosen

Supplier Note

Lines Line Level Taxation

| Type | Description | Qty | UOM | Price | |
|------|-------------|-------|------|--------|----------|
| Item | | 10.00 | Each | 500.00 | 5,000.00 |

PO Line 750001073-1 Service/Time Sheet Line None Contract Period

Supplier Part Number SAP Taxable Flag Service Purchasing (Input) - Tax Exempt ERS Indicator No Serial Number(s)

SAP PO Classification Standard

Billing 550300-CC-T24000-1302-T24000-4

Totals & Taxes

Lines Net Total 5,000.00

Shipping 5

Misc

Tax 0.000 % 0.000

Total Tax 0.00


Net Total 5,000.00

Total 5,000.00 6

Delete Cancel Save as Draft Calculate Submit

If you have an existing purchase order it will be migrated to Coupa, and you will receive new replacement purchase order(s)

Print Email



FirstEnergy Service Company PURCHASE ORDER

| | |
|----------------|--|
| PO NUMBER | 750001004 |
| SAP LEGACY PO | 48000108 |
| DATE | 03/29/23 |
| PAYMENT TERMS | 0175 within 10 days 2 % cash discount within 45 days Due net |
| SHIPPING TERMS | 009 FOB Destination, 3rd Party Billing |
| CURRENCY | USD |
| FE BUYER | John Carr |
| REQUESTER | John Alexander alexanderjh@firstenergycorp.com |

PROFESSIONAL ELECTRIC PRODUCTS CO
33210 LAKELAND BOULEVARD
EASTLAKE, OH 44095
Attn: JONATHON EATON Supplier
JEATON@PEPCONET.COM

Ship To
Warehouse: Miles Main-
FirstEnergy Service
Company
4295 E. 146 ST.
CLEVELAND, OH 44128
5100-0001
Attn: John Alexander

Bill To
76 South Main Street
Accounts Payable A-GO-6
Akron, Ohio 44308
Attn: John Alexander

| Line | Description |
|------|-----------------|
| 1 | Test Services 3 |



If "SAP Legacy PO Number" is populated in your Coupa PO, it is a replacement PO and **not a new request for goods/services**

In many cases **1 existing PO** issued from SAP **will be split into multiple new Coupa POs** so be sure to **invoice against the correct PO**

You must reference the new Coupa PO number on all new invoices

What we've heard from you so far

| Question General | Answer |
|--|--|
| What is the primary positive effect this change will have in doing business with your vendors? Also, what could be viewed as negative effect? | The Coupa Supplier Portal (CSP) allows easy receipt, acknowledgement and management of electronic Purchase Orders (POs) with fast invoice processing and real-time tracking of invoice payment status. |
| What FirstEnergy locations does this affect? | Coupa is rolling out for all FirstEnergy locations and subsidiaries. The following invoice submission / payment processes are not being impacted by the Coupa rollout: ·CCTS ·VMS ·Evaluated Receipt Settlement (ERS) |
| Do suppliers have to pay and fees. If so, how much? Are there any costs for suppliers to us Coupa? | No, the Coupa Supplier Portal is free to all suppliers. |
| Question Coupa Supplier Portal (CSP) Access & Login | Answer |
| What date will I receive the link and credentials (username/password) to log in to Coupa? | You will receive an invitation to link to the Coupa Supplier Portal (CSP) a few days prior to go live. Your email is your username. You will create your own password. |
| If a Supplier already works with FirstEnergy via PowerAdvocate, is registration necessary for Coupa? | Yes, Coupa has replaced PowerAdvocate, separate registration will need to be completed to use Coupa. |
| I tried to Register in the Coupa Supplier Portal (CSP), it is asking for acct # is this our Vendor #? | FirstEnergy will send you an invitation to the Coupa Supplier Portal (CSP) a few days prior to go live. This will allow you to link directly with FirstEnergy without an account number. |
| How are we to register for the Coupa Supplier Portal (CSP) when all that we received was an "informational" link not a "customer-created" invitation link to register? | A few days prior to go live you will receive a Coupa Supplier Portal (CSP) invitation from FirstEnergy to receive Purchase Orders (POs) and submit invoices. |
| I currently submit invoices through Taulia and I have a log in for Coupa to view project events. However, my login in for Coupa does not work for the Coupa Supplier Portal. Is a different log in required for CSP? And if so, how do I get an account set up on CSP? | A few days prior to go live you will receive a Coupa Supplier Portal (CSP) invitation from FirstEnergy to receive Purchase Orders (POs) and submit invoices. |
| I currently use Coupa for other vendors, will FirstEnergy automatically added to my existing account? We currently use Coupa for other customers, are we able to use the same online access with multiple customers? If I have an existing Coupa account. How do I connect FE as a new customer? If you have already signed up with another company using Coupa, how do you attach so all companies are together? | FirstEnergy will send you an invitation to the Coupa Supplier Portal a few days prior to go live. Once accepted, you will see FirstEnergy as one of your customers. |

What we've heard from you so far

| Question Invoicing | Answer |
|---|---|
| When is the last day to submit invoices via Taulia or directly to FirstEnergy? | Suppliers will be notified a few weeks in advance of the final day to submit invoices in Taulia. |
| In the Taulia system it was discouraged on a purchase order with multiple line items to create an invoice that charged each line item. It was recommended to split them into individual invoices charging line items separately. Does Coupa have this same restriction? | FirstEnergy will only support invoices with a single line type (i.e. Quantity Based or Amount Based) as this is an SAP limitation. Suppliers are to invoice for Goods and Services separately in Coupa. |
| Some companies have hundreds of invoices in a month. Is there an automated way to enter invoices? | Coupa has several channels to support automated invoice submission, however, there is typically significant time and resources associated with setting up automated invoice submission for the first time. If you are interested in submitting invoices via automation after Go-Live, reach out to FirstEnergy. |
| Will I have to enter each invoice/invoice line item manually into Coupa for processing? | No. Invoice Header Detail and Line Items will auto-populate from the PO, there are very few fields (such as Invoice Number and Invoice Amount for partial invoices) which are required each invoice submission to successfully submit. |
| When a vendor uses the option to submit the invoice to an email address and it is scanned using optical character recognition to create the entry, are there any sizing requirements for the document? The vendors will be submitting invoices that FirstEnergy will be providing them, and we want to know if any changes will need to be made on our side to support that option. | FirstEnergy does not have this option (InvoiceSmash) in scope. Invoices should be submitted via the Coupa Supplier Portal (CSP) or Supplier Actionable Notification (SAN). |
| If the contract is self-invoicing will the invoice be sent to us and we approve through the Coupa Portal? Will Evaluated Receipt Settlement (ERS) still be used? | Suppliers who have previously been enabled for Evaluated Receipt Settlement (ERS) will still be marked as ERS going forward. Invoices will not be submitted through the CSP for suppliers utilizing Evaluated Receipt Settlement, but suppliers will be able to track the status of their purchase orders and the payment of auto-generated invoices created by FirstEnergy. |
| Question Payments | Answer |
| Will suppliers have access to see when payments for invoices are scheduled to pay? Will suppliers be able to see when invoices have been received in/processed for payment? | Suppliers will have access to review the status of each invoice and whether it has been approved for payment. Once an invoice enters "approved" status, payments on POs with terms other than pay immediately will be processed on the next 10th, 20th, or last business day of the month. If the 10th or 20th fall on a weekend, the payments will be made the following business day. |
| Is this mandatory to receive payment? | If you currently provide invoices to FirstEnergy via paper or Taulia, submitting invoices through Coupa will be mandatory to receive payment |
| Will payment disputes be processed through Coupa? | Yes |

What we've heard from you so far

| Question Supplier Actionable Notification (SAN) Alternative to CSP | Answer |
|--|--|
| <p>How does actionable email work? It sounds like this will be the option for us. Please go into as much detail as possible and describe how actionable email will work and function from start to finish.</p> | <p>Suppliers will receive an email from FirstEnergy with their Coupa purchase order. Suppliers will open the PO with actionable buttons via Supplier Actionable Notifications (SAN). Details are included on slide 9 & 10 of this PPT.</p> |
| <p>When a vendor uses the option to submit the invoice to an email address and it is scanned using optical character recognition to create the entry, are there any sizing requirements for the document? The vendors will be submitting invoices that FirstEnergy will be providing them, and we want to know if any changes will need to be made on our side to support that option.</p> | <p>FirstEnergy does not have this option (InvoiceSmash) in scope. Invoices should be submitted via the Coupa Supplier Portal or Supplier Actionable Notification (SAN).</p> |
| Question Migration of Current Contracts & Purchase Orders | Answer |
| <p>Will legacy open purchase orders be migrated over to Coupa? Will I receive a notification of a new Coupa PO number?</p> | <p>Yes, open purchase orders will be migrated to Coupa. An email will be sent to the supplier for each new Coupa PO. This email notification will include both legacy PO number and new Coupa PO number.</p> |
| <p>If we have a contract those terms will remain the same (i.e. payment terms)</p> | <p>Yes</p> |
| <p>With this transition, what will payment terms be?</p> | <p>Payment terms will remain consistent based on your existing agreements with FirstEnergy.</p> |



If you have additional questions, please email suppliermaintenance@firstenergycorp.com and/or find additional information on our web site [Coupa FAQs \(firstenergycorp.com\)](http://Coupa FAQs (firstenergycorp.com))

