



Bokoni Platinum Mines (Pty) Ltd
Coupa Digital Transformation
Frequently Asked Questions



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1. GETTING READY FOR THE CHANGE

When does Bokoni Platinum Mines go live with Coupa?

Bokoni Platinum Mines went live with the procurement solution on 16 July 2024.

What will be required from me as a supplier?

- You will be required to register on the Coupa Supplier Portal (CSP) using a link that we will send to you.
- Familiarise yourself with the training/support content that will be sent to you.
- Send us all your questions or enquiries through to Myprofile@bokoniplatinum.co.za.

How much does it cost to join the CSP?

Suppliers will **NOT** be charged to register and transact on the CSP.

What are the benefits of registering on the CSP?

Suppliers who have registered on the Coupa Supplier Portal will have:

- The ability to create and submit electronic compliant invoices linked to a PO.
- The ability to receive, view and manage all Purchase Orders (PO) in a central place.
- The ability to view invoice processing status (e.g., Pending Approval, Approved).
- The ability to customise your CSP account (e.g., assign permissions to users in your company and contact information).
- The ability to transact with multiple Coupa-linked customers on one portal.
- The ability to update, manage and maintain supplier information.

Do we wait for an invite to register for Coupa?

Yes, Bokoni will send you an invite.

Is there somebody at COUPA we can contact about system problems?

For support, please use the link below <https://supplier.coupa.com/help/>

If I do not register on the CSP, does that mean I will not receive purchase orders and will not be able to submit my invoices?

We highly recommend that all our suppliers register on the CSP. However, suppliers not registered on the portal will still be able to receive POs and RFQs and submit invoices via a Coupa-generated email.

Is it mandatory to use the CSP?

No, it is not mandatory; however, we highly recommend that all our suppliers register with the CSP.

2. COUPA SUPPLIER PORTAL (CSP) BASICS

I have received an invitation from Bokoni Platinum Mines via the CSP to register. How do I know that I am connected to Bokoni Platinum Mines?

Once you have registered and signed into the CSP, scroll down to the bottom right of the page, where you'll see '**African Rainbow Minerals**' under the '**Latest Customers**' heading.

I have received an invitation to register on the CSP. Can I forward the invitation to the right person in my company?

Yes, you can forward a copy of your invitation* by clicking on the 'Join Coupa' button in your email, navigating to the bottom of the screen, and under the heading '**Forward your Invitation**', type in your colleague's email address and click '**Submit**'.

***Please note:** the person must have the same email domain as you.

If I already have an existing Coupa profile, will I be required to register again?

No, you will receive an email informing you that Bokoni Platinum Mines has added you as a supplier on the CSP, and all you need to do is click on the 'log in to Coupa' link to connect.

Our organisation has a CSP account with another customer. Can I consolidate them into one?

Yes, you can. Once you've logged into the CSP, you'll see the heading 'Merge Accounts' on the right. If your company has more than one CSP account, you can click on 'Request Merge' to consolidate them into one account.

How do I add an employee to the CSP?

Once you've logged into the CSP, click on the 'Admin' tab on the home page. Click on the '**Users**' option, navigate to the right, and click the '**Invite User**' button. Provide the required information in the window that opens to complete the invitation process.

Is the information in the CSP archived?

No, the information in the CSP is not archived, but you can access it if you have a CSP account.

Regarding the uploading of information, is this not link dependent?

No, it is not link-dependent.

How do I set up my legal entity in the CSP (Information required to create and submit a legal invoice on the CSP)?

- a) Go to Setup > Admin > Legal Entity Setup and select Add Legal Entity in the top right corner.
- b) Enter the official name of your business registered with the local government, select the country/region where it is located, and select Continue.
- c) On the **Tell your customers about your organisation** page, complete the fields.
- d) Select Save and Continue.
- e) On the **Where do you want to receive payment?** On the page, select how you'd like to be paid using the **Payment** Type selector.
- f) Select **Save & Continue**.
- g) You can select **Add Remit-To** to add an additional remit-to address, or you can select **Manage** next to an existing remit-to to edit it. Once you are finished making changes, select **Next**.
- h) On the **Where do you ship goods from?** Page, add your ship-from address, remit-to integration code, and contact information, as well as the Coupa customers who can use this remit-to account.
- i) Once you are finished making changes, select Done.
- j) The **Setup Complete** page confirms that your legal entity setup is complete and that you can use it on invoices.

***Please note:** If you do not set up your legal entity, you will not be able create invoices.

3. RFQs/SOURCING EVENTS

Will RFQs be published on the CSP?

RFQs/Sourcing Events will **NOT** be published on the CSP but will be managed through Coupa.

When working on an RFQ, am I able to save and complete the response later?

Yes, you have the option, click 'save' at the bottom of the page.

When responding to an RFQ/sourcing event or tender, is there a file size limitation for attachments?

Coupa objects can accept up to 100 MB per attachment. For performance reasons, you may consider limiting the attachment size to 16 MB.

How can I enquire further about the specifications of the RFQ/Sourcing event?

You can send the buyer (event owner) a message in the message box on the bottom left of your screen and they can respond and even attach a file.

Is there a limitation in terms of file formats?

Image attachments on invoices must be one of these types: TIFF or PDF.

These types of files can't be attached to Coupa documents: EXE, BAT, COM, SH, DEB, SO, ELF, BIN, RPM, TAR, KO, PY, PHP, MSI, AXF, PRF, or PUFF.

Is it possible to change my response if I have already submitted my response to the buyer?

Yes, you can click on the '**edit response**' button at the top of the page; however, this is only possible while the event is still running.

Do we get email alerts for every RFQ/Sourcing event?

You will only get email notifications **if** the buyer has invited you to participate in that RFQ/sourcing event.

Will you be able to send the Spot Bids to another email address in our company?

Spot Bid will be sent to the email address provided. Should you wish to change the email, contact the buyer.

Is there an option for delivery and lead time?

Yes, there will be an option available when you are quoting for the product.

4. PURCHASE ORDERS

How do I see my purchase orders?

Once logged into the portal, click on the '**Orders**' tab. If you are connected to more than one Coupa customer, select their name from the '**Select Customer**' dropdown menu on the top right corner of the page. You can then proceed to select the specific customer's PO you'd like to see.

Can I create an invoice that isn't backed by a purchase order on the CSP?

No, you can, however, create invoices from PO's that were already in the system.

Does a POs on the CSP have an expiry period?

No, there is no expiration period; however, the buyer/requester can cancel the PO.

If there is a mistake on the PO, how am I able to resolve this?

You can communicate directly with the requester, as their details will be on the PO.

You can also leave a message in the '**comment**' section at the bottom of the PO.

What is the purpose of the PO acknowledgement check box?

This confirms that you have received the PO from us and are working on delivery.

Who is supposed to acknowledge the order?

The person who receives the order.

Can more than one email address be added to the PO mailer list?

Unfortunately, only one email ID can be added. In the event you are out of office you can notify the buyer who can edit it to an alternative Email address.

What does the following Purchase Order (PO) status' mean?

1.	Buyer Hold	The PO is approved but pending buyer review handled by the Procurement department.
2.	Cancelled	The PO is cancelled and doesn't need to be fulfilled.
3.	Closed	The issued PO was received and then closed, either manually or automatically, within Coupa.
4.	Error	There's something wrong with the PO. Contact the buyer to get the PO back on track.
5.	Issued	The PO was approved and sent to you.
6.	Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status. You cannot invoice against a soft closed PO.

5. INVOICING

What options are available for me to submit invoices to my customers?

- The CSP, where you sign in to manually flip a PO to create an invoice.
- Supplier Actionable Notifications (SAN), where you act on an email without logging in to the CSP.

What will happen to the PO's I received before Bokoni Platinum Mines went live with Coupa?

You will receive new Coupa PO's with references to the old SAP PO's, which you may invoice against on the CSP.

Can I use my own invoice number in the CSP?

Yes, Coupa requires that you enter your own unique invoice number when creating an invoice.

If you have a PDF invoice from your invoicing system, do you upload this in the File Upload part?

Yes, as an attachment

Other companies require a signed invoice to be submitted - Will this be the same or will Bokoni authorise the invoice?

Goods (Items delivered to and through stores)- You may submit an unsigned invoice Services – A signed time sheet or job card or certificate or/and acknowledgement that the service has been rendered is required. The invoice should also be approved if these documents don't reflect the value of the service.

At our company, we use SAGE to create quotations and invoices. Will it be possible to submit invoices from SAGE to Coupa?

No, invoices should be created and submitted through the CSP.

Will we have to create invoices on COUPA, or can we upload our company invoices?

Yes, you will have to create an invoice on Coupa and you can attach additional documents.

Does Bokoni require Service sheets before loading the invoice

Not in scope for now.

How do I create an invoice?

On the CSP 'PO' tab, click on the dropdown and choose the desired customer '**Bokoni Platinum Mines**'. In the PO table that appears, under the '**Actions**' heading of the line item associated with your PO, click the yellow coins icon to create a new invoice.

Alternatively, in the PO you received via email (SAN – Supplier Actionable Notification), click on 'Create Invoice', proceed to create your invoice, and then submit it.

Do I need to set up my legal entity each time I create an invoice?

No, after setting up your legal entity, it will appear on each new invoice you create.

What does the following invoice status' mean?

1.	Draft	The invoice has been created, but it has not been submitted to your customer yet.
2.	Pending approval	The invoice is currently under review by the AP department.
3.	Processing	The invoice is being processed by the AP department and should be paid soon.
4.	Approved	The invoice has been accepted for payment by our AP department.
5.	Disputed	Invoices with a disputed status are invoices with information that our AP department does not agree to, needs clarification on, or finds incorrect.
6.	Abandoned	The disputed invoice has been abandoned.
7.	Voided	Something is wrong with the invoice. Reasons such as invoices can be duplicate or has already been paid for through an earlier invoice.

Will I be able to invoice from an existing contract I have with Bokoni Platinum Mines?

No, this is not in scope.

Do I require a PO to match with an invoice if I have an existing contract?

No, contract back invoices are not in scope flip against contract in the CSP.

Can I attach supporting documents to my invoice?

Yes, you can attach supporting documents to your invoices on the CSP*.

Why can't I edit/void/delete an invoice?

Once an invoice has been submitted, it can't be changed in any way. However, you can create a credit note that credits for the original value and then create a new invoice.

How do I add shipping charges to an invoice?

No, this would need to be reflected on the PO.

How can I include taxes when creating an invoice?

When creating an invoice, there is a 'Taxes' section that allows you to select and add your tax description, tax rate, tax amount, and tax reference number.

How do I create a credit note?

Click on the **Create Credit Note** button above the **Invoices** table on the Invoices page or, on the **Orders** tab, click on the Create Credit Note - red coin icon for the PO in the Actions column of the Purchase Orders table.

Follow the prompts to successfully submit your credit note.

What does the 'Export' button do?

This enables you to export the PO and invoice rows to an Excel document.

If I am not able to deliver the full quantity that was ordered, can I invoice for what I delivered?

Yes, when creating your invoice, you can specify the quantity you want to invoice (Partial invoicing).

6. PAYMENTS

If I use the CSP, who pays me?

Bokoni Platinum Mines is still responsible for settling your account. You can track the status of your submitted invoice in the CSP.

Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is in your customer's queue, and you'll be paid based on the PO/ Supplier payment terms.

What do I do if an invoice is rejected or disputed?

For invoices that are rejected or disputed, suppliers will have to create a credit note crediting for the original value and then create a new invoice.

What if I have an invoice that hasn't been paid?

For questions regarding payment information, send an email to Accounts.payable@bokoniplatinum.co.za.