Solar Turbines
A Caterpillar Company

Invoicing Guidelines for Solar Turbines

Dear Supplier,

Solar Turbines values its relationship with our suppliers. Therefore, we have partnered with Coupa, an electronic procure-to-pay system to help us communicate more efficiently with you and streamline the invoice process.

Coupa Procure-to-Pay will be the only way to submit invoices to Solar Turbines.

This guide will show you how to be successful using Coupa to view purchase orders and submit invoices.

Thank you for your partnership,

Solar Turbines

If you have questions on registering or using Coupa, please contact us at:

T3_Solar_Turbines_Coupa_Purchasing_System@solarturbines.com

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Log in to the Coupa Supplier Network After Initial Registration

1. Go to the Coupa website: https://supplier.coupahost.com/session/new
2. Adjust the language at the bottom of the screen, if needed
3. Enter the email address and password used when initially registering with the Coupa Supplier Network. Click the 'Log In' button
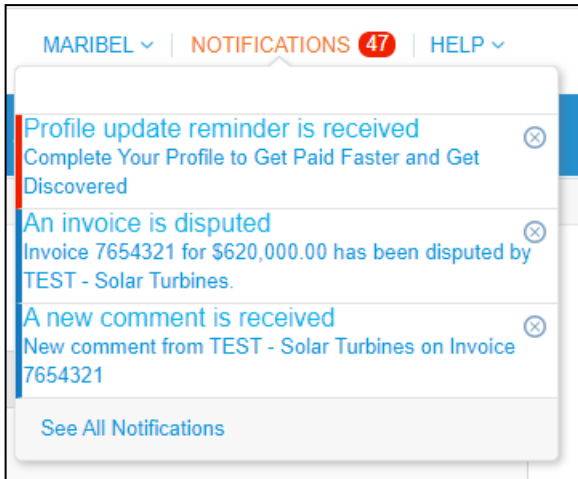

Update Information

If any of your information needs to be updated, please contact your Buyer, and request a Supplier Information Update Form. Please do not update your information through the portal until you have requested this form.

Navigate the Coupa Supplier Portal

HEADER:

- ▪ 'Username': hover over your name to access Account Settings or Notification Preferences
- ▪ 'Notifications': hover over this to view a condensed list of your most recent PO's, Invoices and To Do's (Click View All)
- ▪ 'Help': additional resources available

TABS:

- ▪ 'Home' tab: view customers you are connected to, view announcement from Solar
- ▪ 'Profile' tab: do not update information here. Solar will not receive this information
- ▪ 'Orders' tab: view all purchase orders
- ▪ 'Invoices' tab: create and manage invoices to send to customers
- ▪ 'ASN' tab: send advance ship notice, notification about when you ship items
- ▪ 'Catalogs' tab: create and manage customer specific catalogs (talk to your buyer if you are interested in catalog creation)
- ▪ 'Sourcing' tab: maintain any sourcing / RFQ events here
- ▪ 'Admin' tab: invite a colleague for portal access, view Terms of Use. Do not update any company information through this tab. Please contact your buyer if you need to change information
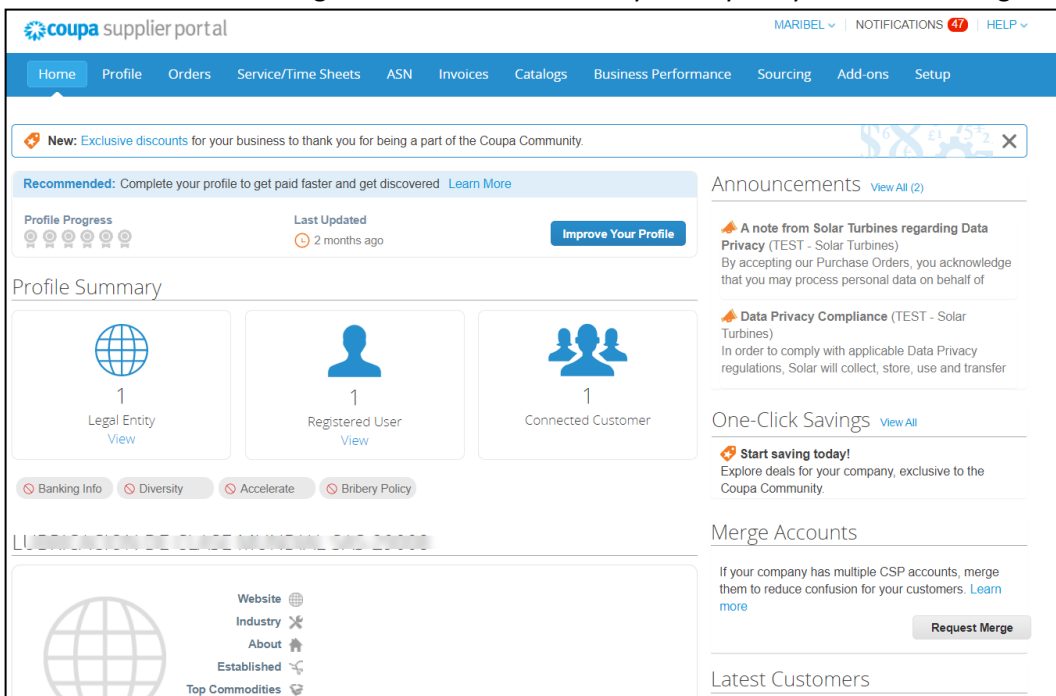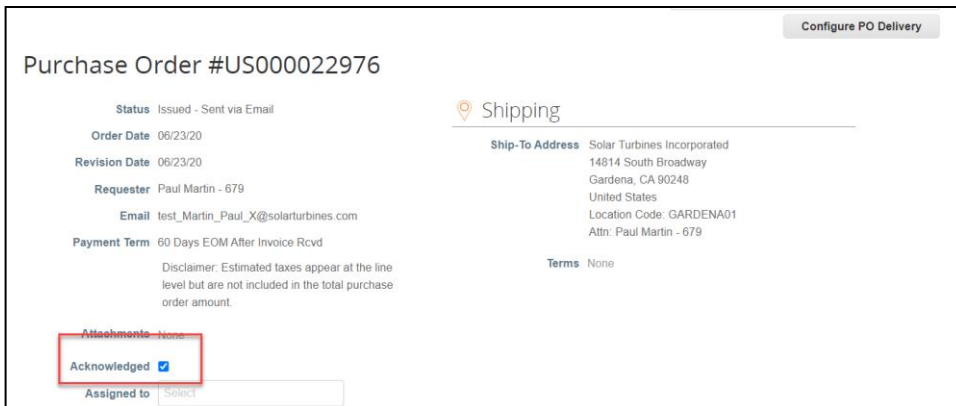
View Purchase Orders

Please note: Ensure Solar Turbines is selected on the "Select Customer" menu.

1. Select "Orders" from the Menu screen to view Purchase Orders. The Orders page lists all the Purchase Orders submitted to you by Solar Turbines
2. Click any Purchase Order Number (PO#) to view the details of that order
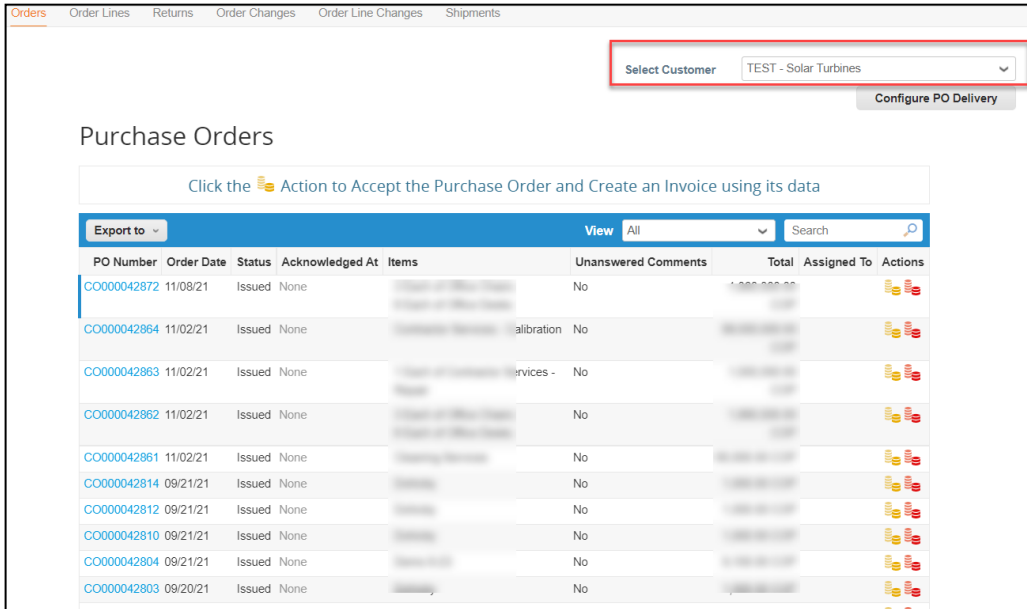
Acknowledge PO

When viewing a PO, you may select the "Acknowledge" box to inform Solar Turbines electronically, that you acknowledge receival of the PO

Create an Invoice

1. To create an Invoice, click on the "gold coins" icon under the Actions column for the PO you are wanting to invoice. Details from the Purchase Order will automatically convert into an Invoice.

2. Complete the invoice page. All items marked with red asterisk (*) are required for Solar Turbines to process your payment

HEADER / GENERAL INFO

- Invoice #: Enter the invoice # of the invoice you used for this order. Each invoice must have a unique Invoice #
- Invoice Date: Enter the date of your actual invoice. Invoice submission will be blocked if the invoice is backdated >7 days
- Currency: Will default to currency submitted on the PO
- Image Scan: Attach a copy of your invoice for this order. Depending on the country, this may be required to submit the invoice
- Supplier Note: This is a note for YOU, the supplier. This will not be visible to Solar Turbines
- Attachments: This is where you add any extra information for your customer. You can create notes, leave tracking numbers or anything else. Click the 'Text' link to leave a note for the customer
- Supplier Information: Defaulted information provided during the onboarding process

INVOICE LINES

- Quantity: You may decrease the quantity on any line of the invoice if only partial fulfillment has been provided or if this is a blanket PO. However, you may not invoice for a quantity greater than indicated on the PO. A new PO will need to be created
- Price: You may decrease the price on any line of the invoice; however, you may not increase the price. An invoice submitted with a price greater on the PO will be automatically disputed. A new PO must be created if there is a price discrepancy
- Tax: You can tax at the line level by selecting "Line Level Taxation", or at the bottom (please ask your buyer if there is specific tax information for your country)
- Tax Reference: Use this field if you are in a country where tax is not required. Please reference the legislation which references why the line item is not subject to tax
- Shipping: Enter these fees if applicable. Otherwise, leave them with 0.000

- Calculate: Update your invoice total with any added fees by clicking this button
- Comments: Use the Comments box to communicate with Solar regarding this PO

Please note: The Coupa invoice needs to match the line items on the PO. It is OK if the attached/internal invoice does not mirror the Coupa invoice you submit…only the total $ amounts of the invoices need to align.

3. Submit: Click this button when your invoice is complete. This invoice replaces any emailed/mailed invoices. Please only submit the Coupa invoice for payment.

Create a Credit Memo

1. Visit the Orders tab and find the appropriate PO
2. Select the "red coin" icon
3. Complete the information in the Credit Memo form with the amount to be credited
4. Click "Submit" to initiate
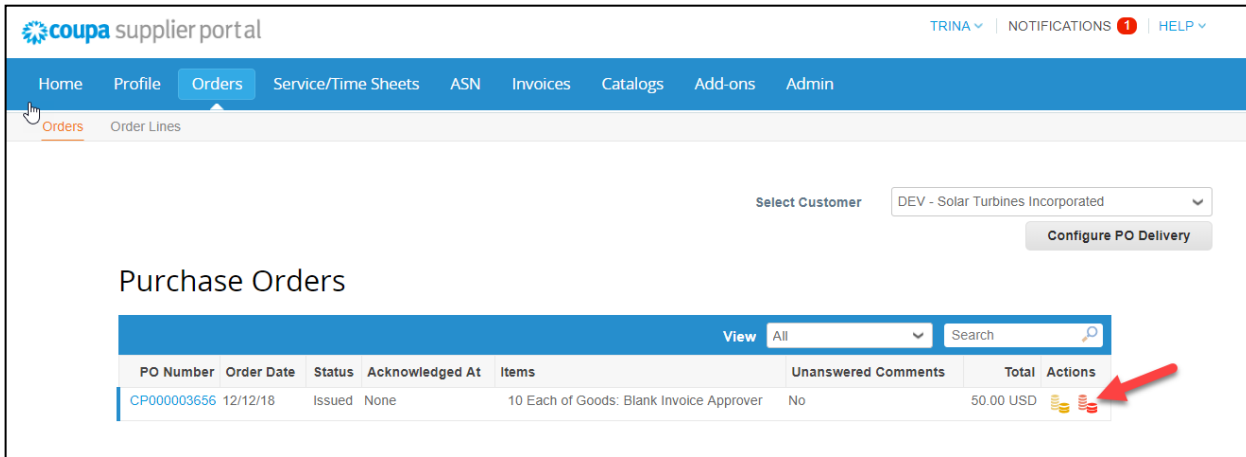
Tips to Get Paid on Time

- Ensure that all required items mentioned above are included with your invoice.
- Do not INCREASE the Quantity or Price of any item. A new PO must be created from Solar Turbines regarding any increases in price or quantity.
- Once an invoice has been approved, you will be paid based on your pre-established payment terms

Give Co-Workers Access to Solar Turbines PO's and Invoices in Coupa

You can enable others in your company to have access to Coupa to view Solar Turbines' POs and Invoices. Please visit the Admin tab and click 'Invite User'