



Coupa Supplier Portal: Quick Reference Guide – For Suppliers

11/3/2020

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What is the Coupa Supplier Portal?

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with UPS, using Coupa.
- Suppliers have the ability to manage various content and settings via the CSP, such as:
 - Managing/updating company profile information
 - Viewing purchase orders
 - Sending invoices
- The easiest way to get set up to use the CSP is to send an e-mail to supplyline@ups.com and request an invitation.
- Once you accept the invitation and register, you'll be automatically connected to UPS.

Getting Started – Invitation or Self Registration

Invitation from UPS

- Users will receive an e-mail from our Coupa system with a unique link to join the Coupa Supplier Portal.
- Click the link in the email to be directed to the CSP and register your account.
- Save <https://supplier.coupahost.com/> as a favorites link for quick access, to return to the site.

Self-Registration

- Register at: <https://supplier.coupahost.com/>
- Once registered, users will appear as “Linked” in Coupa. An e-mail, with the subject line “Coupa ID,” containing the e-mail address used to register, should be sent to supplyline@ups.com.
- Users already on the CSP with another Coupa customer can send the previously used CSP email address to our Supplier Enablement team and they’ll do the rest.

The image shows two side-by-side screenshots of the Coupa web interface. The left screenshot is the 'Register' page, titled 'New to Coupa? Create Your Account.' It features four input fields: 'First Name', 'Last Name', 'Company', and 'Email'. Below the 'Email' field is a blue 'Register' button. The right screenshot is the 'Log In' page, titled 'Welcome back!'. It has two input fields: 'Email Address' (containing 'hotis@theshelbygroup.co') and 'Password' (masked with dots). Below these fields is a blue 'Log In' button and a link for 'Forgot Your Password?'.

Invitation and Welcome

- Click on the link in the e-mailed invitation and Coupa will display this welcome window to register on the CSP.
- Start by entering and confirming a password and acknowledging acceptance of the Privacy Policy and Terms of Use.

coupa

Create your business account

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

Email

Password

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

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

[Get Started](#)

[Having an issue with signup?](#)

[Forward this to someone](#)

COUPA'S PRIVACY POLICY

Coupa is committed to protecting and respecting your privacy. In this privacy policy ("Privacy Policy"), we explain how Coupa collects, uses, discloses and protects the Personal Information you submit to us, including, for example, when accessing and using Coupa websites or applying for job offerings.

Our Privacy Policy has been drafted to comply with applicable data privacy laws, in particular, the EU General Data Protection Regulation ("GDPR"). If the GDPR does not apply to you, not all terms of this Privacy Policy may be relevant to you. To learn more about our approach to GDPR compliance, please click [here](#).

COUPA OPEN BUSINESS NETWORK TERMS OF USE

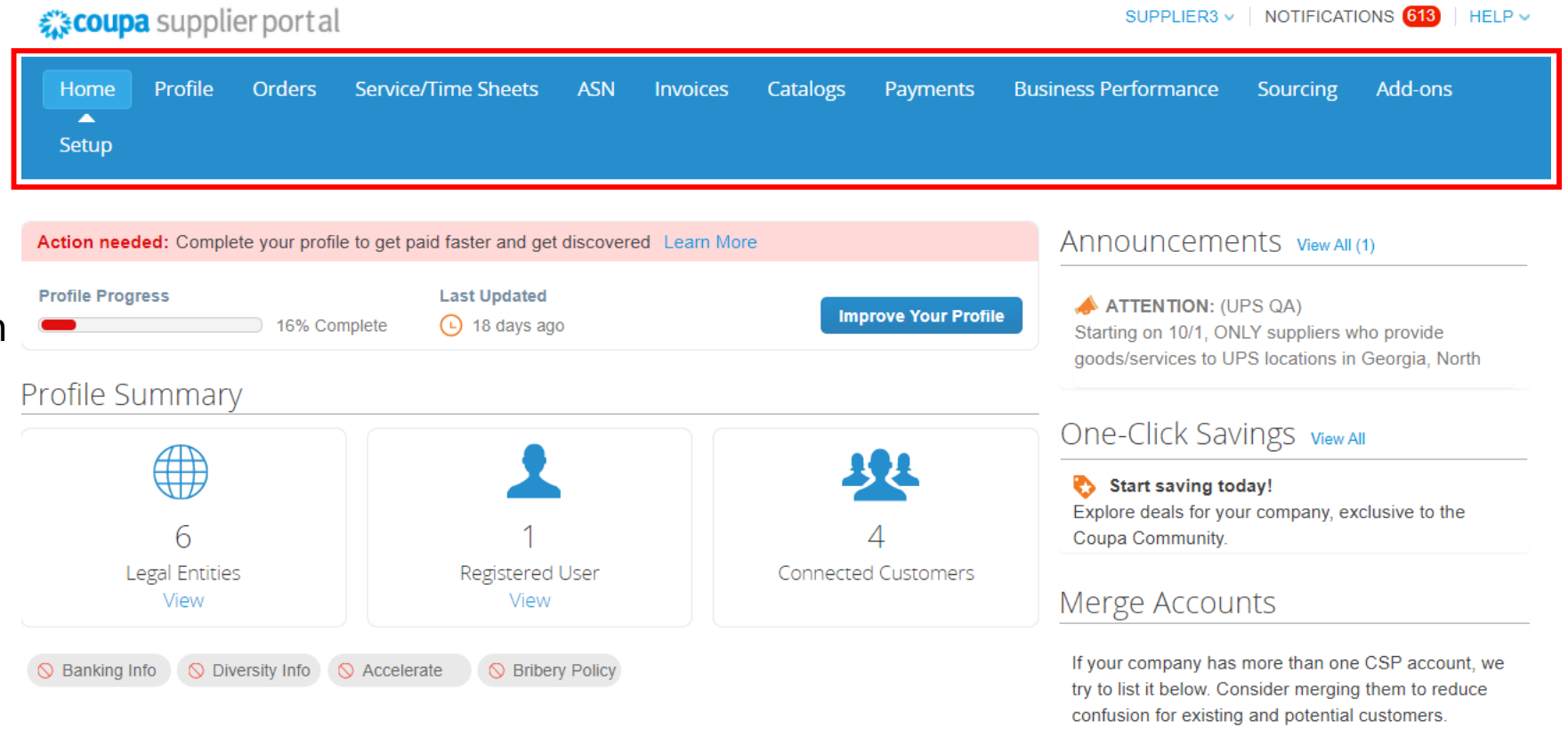
Last Updated: August 20, 2020

[Archive](#)

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Home Screen

- Use the navigation bar to review and acknowledge orders or submit invoices.
- Accessing transactions with these tabs provides users with real-time status updates on orders and invoices with UPS.



The screenshot displays the Coupa Supplier Portal home screen. At the top left is the Coupa logo and 'supplier portal' text. On the top right, there are links for 'SUPPLIER3', 'NOTIFICATIONS 613', and 'HELP'. A blue navigation bar is highlighted with a red border, containing tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below the navigation bar, a pink banner reads 'Action needed: Complete your profile to get paid faster and get discovered' with a 'Learn More' link. A 'Profile Progress' section shows a 16% complete progress bar and a 'Last Updated' timestamp of 18 days ago, with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '6 Legal Entities View', '1 Registered User View', and '4 Connected Customers'. At the bottom, there are four toggle buttons: 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'. On the right side, there are three sections: 'Announcements' with a 'View All (1)' link and an 'ATTENTION: (UPS QA)' notice; 'One-Click Savings' with a 'View All' link and a 'Start saving today!' prompt; and 'Merge Accounts' with a paragraph explaining the benefits of merging CSP accounts.

Public Profile

- Users can configure their profile/account and administer connection through the CSP.
- There is a *Profile* link on the home page that will take users to their public profile.
- Users can click the *Profile* button on the navigation bar or the *Improve Your Profile* button to update/edit their profile.

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'SUPPLIER3', 'NOTIFICATIONS 613', and 'HELP' are on the right. A blue navigation bar contains 'Profile' (highlighted), 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below the navigation bar, a red banner reads 'Action needed: Complete your profile to get paid faster and get discovered' with a 'Learn More' link. A 'Profile Progress' section shows a 16% complete bar and 'Last Updated 18 days ago'. A prominent blue button says 'Improve Your Profile'. The 'Profile Summary' section features three cards: '6 Legal Entities View', '1 Registered User View', and '4 Connected Customers'. Below these are links for 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'. The 'CRP Supplier 3' section includes a globe icon and links for 'Website', 'Industry', 'About', 'Established', and 'Top Commodities'. A white box at the bottom of this section contains 'Public Profile' and 'Profile' buttons. On the right side, there are sections for 'Announcements' (with a 'View All (1)' link), 'One-Click Savings' (with a 'View All' link), and 'Merge Accounts'. The 'Merge Accounts' section contains text about merging CSP accounts and a 'Click here' link. The 'Latest Customers' section lists several customer names, including 'UPS - CRP Supplier 3' and 'UPS QA - UAT Supplier - Milind'.

Purchase Orders

- View purchase orders (POs) by clicking the *Orders* button in the navigation bar. This will provide a summary of all POs from UPS.
- Clicking on the *blue PO numbers* will open another screen and allow users to view the entire PO.

coupa supplier portal

SUPPLIER3 | NOTIFICATIONS 613 | HELP

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

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer UPS QA - P035_3313610_TXDALLAPOBOX73

Configure PO Delivery

Purchase Orders

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
COU1496	10/21/20	Issued	None	1 Each of Test Item	No	20.00 USD		
COU1473	10/15/20	Soft Closed	None	1 Each of Test Item	No	20.00 USD		
COU1471	10/15/20	Issued	None	2 Each of Test Item	No	20.25		

Purchase Order #COU1287

Status Issued - Sent via Email

Order Date 08/27/20

Revision Date 08/27/20

Requester Mark Baehl

Email mbaehl@theshelbygroup.com

Payment Term NET 30

Attachments None

Acknowledged

Assigned to

Shipping

Ship-To Address 0247 DISTRICT ALLOCATION
164 W VAN BUREN
CHICAGO, IL 60605
United States
Location Code: ILAS3AO2633
Attn: Mark Baehl

Terms FOB

Shipment Tracking

No shipment tracking.

Lines

Invoices


- Create an invoice by clicking the Gold Coin Icon in the *Purchase Orders* view.
- Clicking on the yellow “Coins” under the *Actions* column will start the invoice process for that particular PO. The red “Coins” are used to submit a credit memo.
- Invoices can also be created from an open purchase order, by clicking the *Create Invoice* button, below the Lines section.

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}

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
nT000295	03/21/19	Issued	None	1 Each of Chocolate Cake	No	50.00	

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Chocolate Cake	1	Each	50.00	50.00	0.00

Part Number
None

Per page 15 | 45 | 90

Total 50.00 USD

[Create Invoice](#) [Save](#) [Print View](#)

Invoices

- Clicking the *Invoices* button, on the navigation bar, will display a list of invoices.
- The list view can be filtered, using the dropdown menu (1) or by searching for a particular invoice (2).
- While in draft form, use the pencil or the red "X", under the Actions column, to edit or delete invoices respectively.
- Open any specific invoice or its associated purchase order by clicking on the appropriate *blue hyperlink*.

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

Setup

Invoices Payment Receipts

Select Customer UPS QA - P035_3313610_TXDALLAPOBOX73

Invoices

Create Invoices ⓘ

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

Export to View All **1** Search **2**

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
647	10/27/20	Draft	None	0.00 USD	No		
disputerequester	10/27/20	Pending Approval	None	10.10 USD	No		

NOTE: The payment terms and/or payment due date are not visible in the CSP.

Invoice Requirements

- Enter all information into the required fields, before submitting an invoice.
- Some required fields may be automatically populated, depending on how the invoice was created.
- Required fields are marked with a red asterisk*.

Create Invoice Create

General Info

* Invoice # ✓

* Invoice Date

Payment Term

* Currency ▼

Status

Image Scan No file chosen

Supplier Note

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

From

* Supplier

* Invoice From Address

* Remit-To Address

* Ship From Address

To

Customer

Bill To Address


Ship To Address

Description

Please provide an Invoice/Pay Authorization description

Invoice Requirements (continued)

- On invoices where the *Requester Name* and *Requester Email* fields are required, the information input should be that of the UPS employee who requested the goods or service.

* **Ship To Address** 0083 DISTRICT ALLOCATION 
8315 NE AIRTRANS WAY
PORTLAND, OR 97218
United States
Location Code: ORAIRAO2651

* **Requester Email**

* **Requester Name**

Description

Please provide an Invoice/Pay Authorization description

Setup - Admin

- Clicking *Merge Requests* will allow administrators to merge multiple CSP profiles within the same company. This can occur when one company has multiple divisions or customers using Coupa. This feature keeps them all together in the CSP.
- Clicking *Remit-To* allows administrators to add or change the company's remit-to address in the CSP. The remit-to address prepopulates in the required fields and is the address UPS has for the company in its Coupa supplier record.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal', along with user information: 'SUPPLIER3', 'NOTIFICATIONS 613', and 'HELP'. A navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below this, a 'Setup' button is highlighted, and a sub-menu shows 'Admin' selected, with 'Customer Setup' as an option.

The main content area is titled 'Admin Users' and features an 'Invite User' button. A table lists user details:

Users	Permissions	Customer Access
Supplier3 Test ups.crp3@gmail.com Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	UPS - CRP Supplier 3 UPS - P035_30754_FLDELRA2200_OL_OFFICE DEPOT UPS QA - P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS UPS QA - UAT Supplier - Miiind

A sidebar menu on the left is open, showing options: Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences (with a dropdown arrow), Static Discounting, Dynamic Discounting, SFTP Accounts, and cXML Errors.

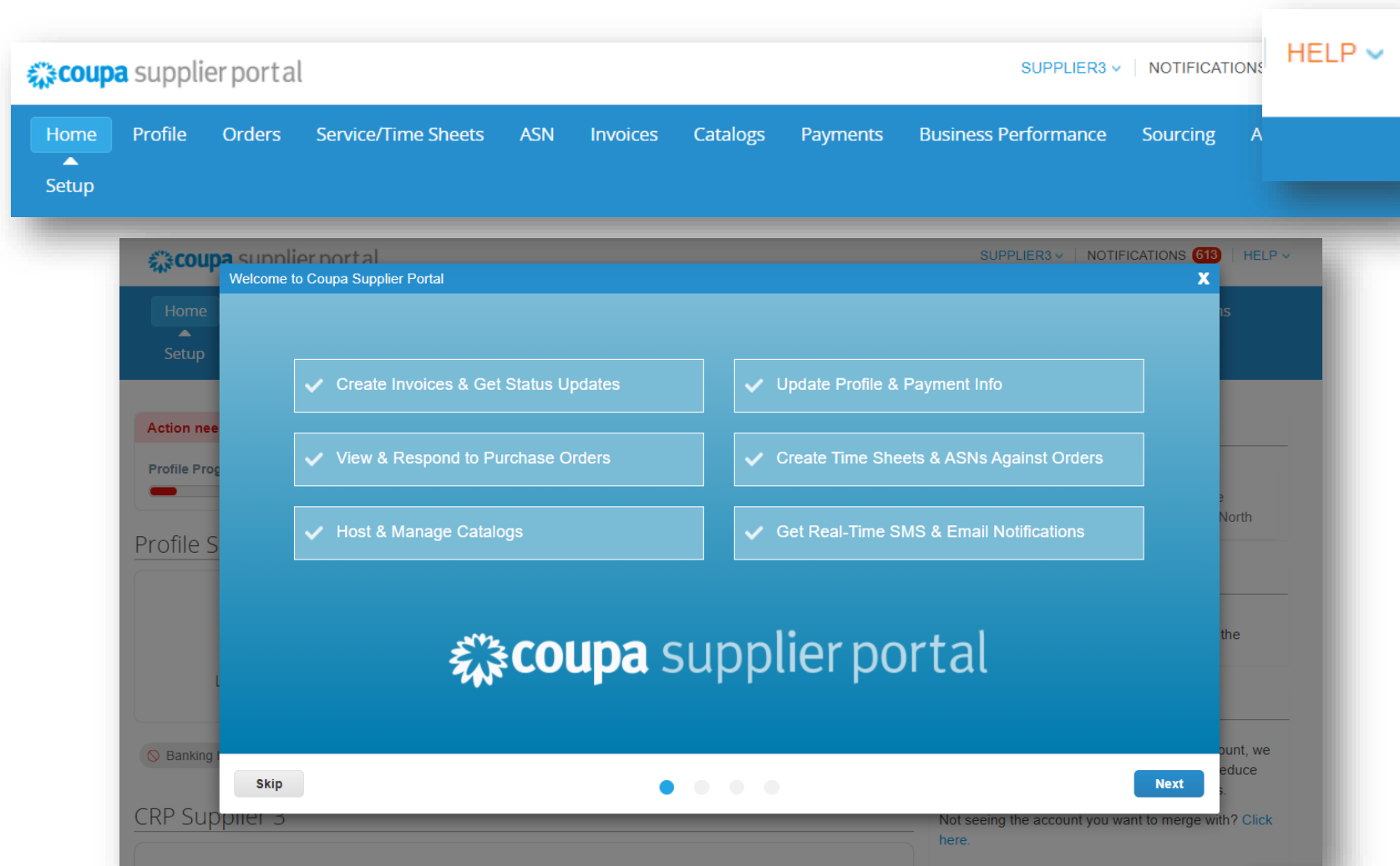
Account Settings

- Selecting the *Account Settings* option from the dropdown menu, under their name (top right, above the navigation bar), will take users to a screen where their log-in information for the CSP can be changed.
- On this screen, users change their name, e-mail address, and password.
- Selecting the *Log Out* option from the dropdown menu, under their name (top right, above the navigation bar) will log users out of the CSP and return them to the log-in screen.

The screenshot displays the 'coupa supplier portal' interface. At the top right, a user profile dropdown menu is open, showing options for 'Account Settings', 'Notification Preferences', and 'Log Out'. The main navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, and Catalogs. The 'Business' header is highlighted. The 'My Account Settings' section is active, showing a sidebar with 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication'. The 'User Details' form includes fields for First Name (Supplier3), Last Name (Test), Email (ups.crp3@gmail.com), Department (Operations), and Role (E-Commerce Manager). A 'Save' button is located below the form. The 'Change Password' section is partially visible at the bottom, showing a 'Current Password' field.

Getting Help

- Choosing the Help Tour option from the Help drop down menu in the upper right corner will redirect users to the Coupa Supplier Portal Help pages.
- Still have questions? Need more help? Email supplyline@ups.com for additional assistance.





THANK YOU