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.

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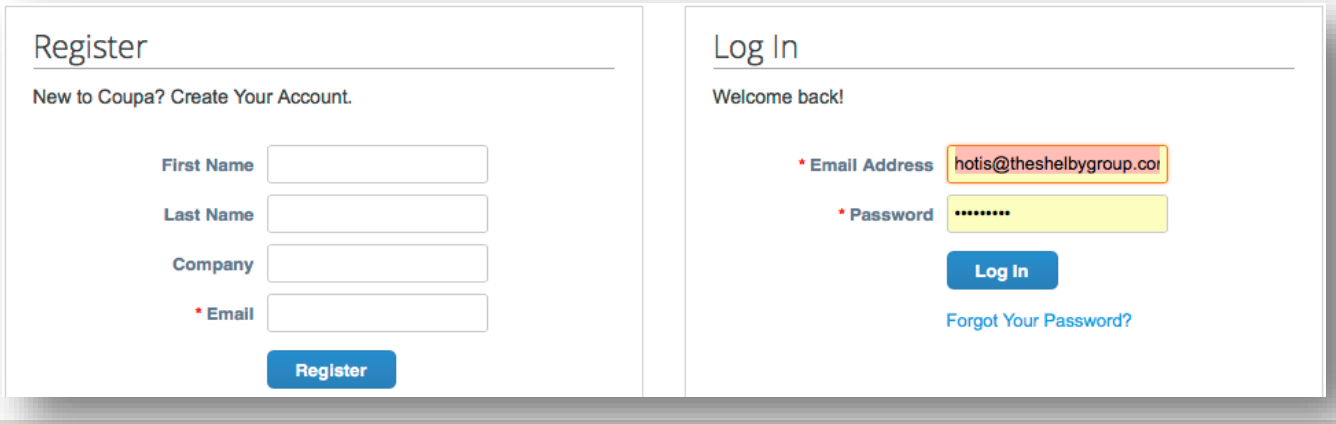
Getting Started – Invitation or Self Registration

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.



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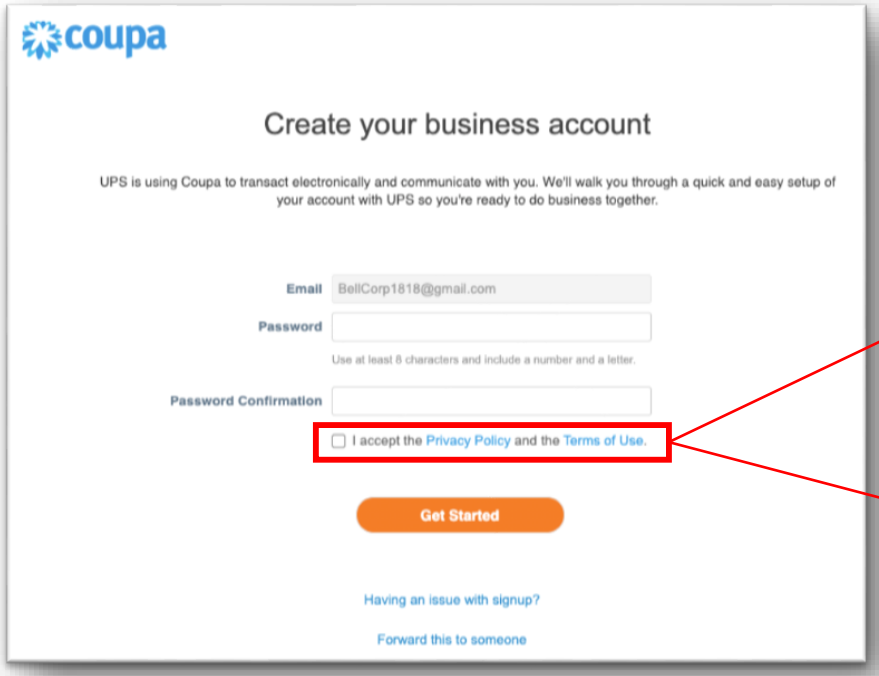
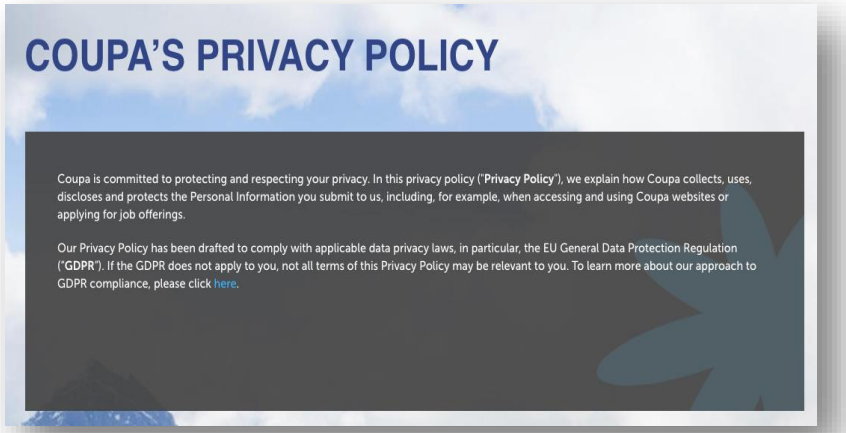
Invitation and Welcome

- 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.





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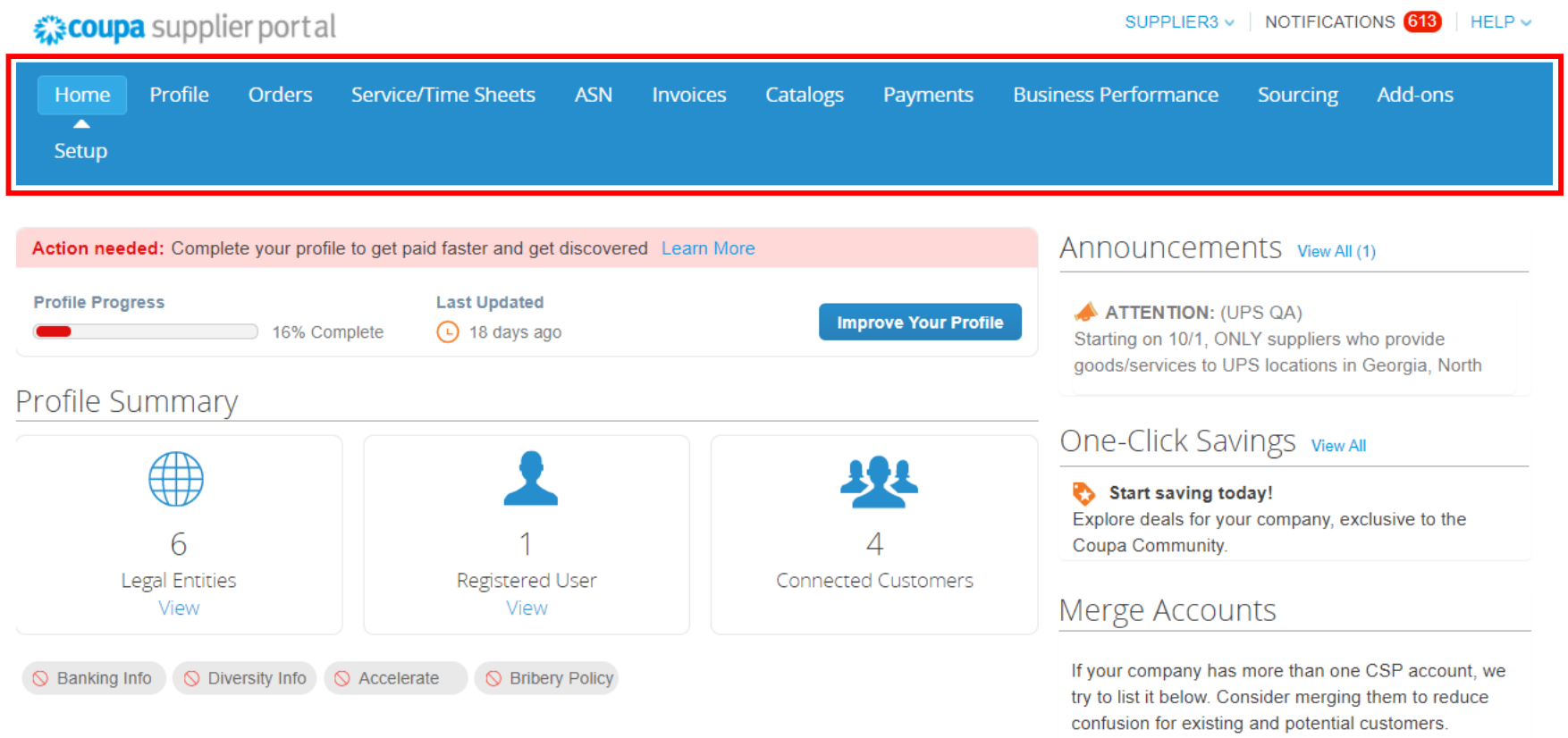
Home Screen

- 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.



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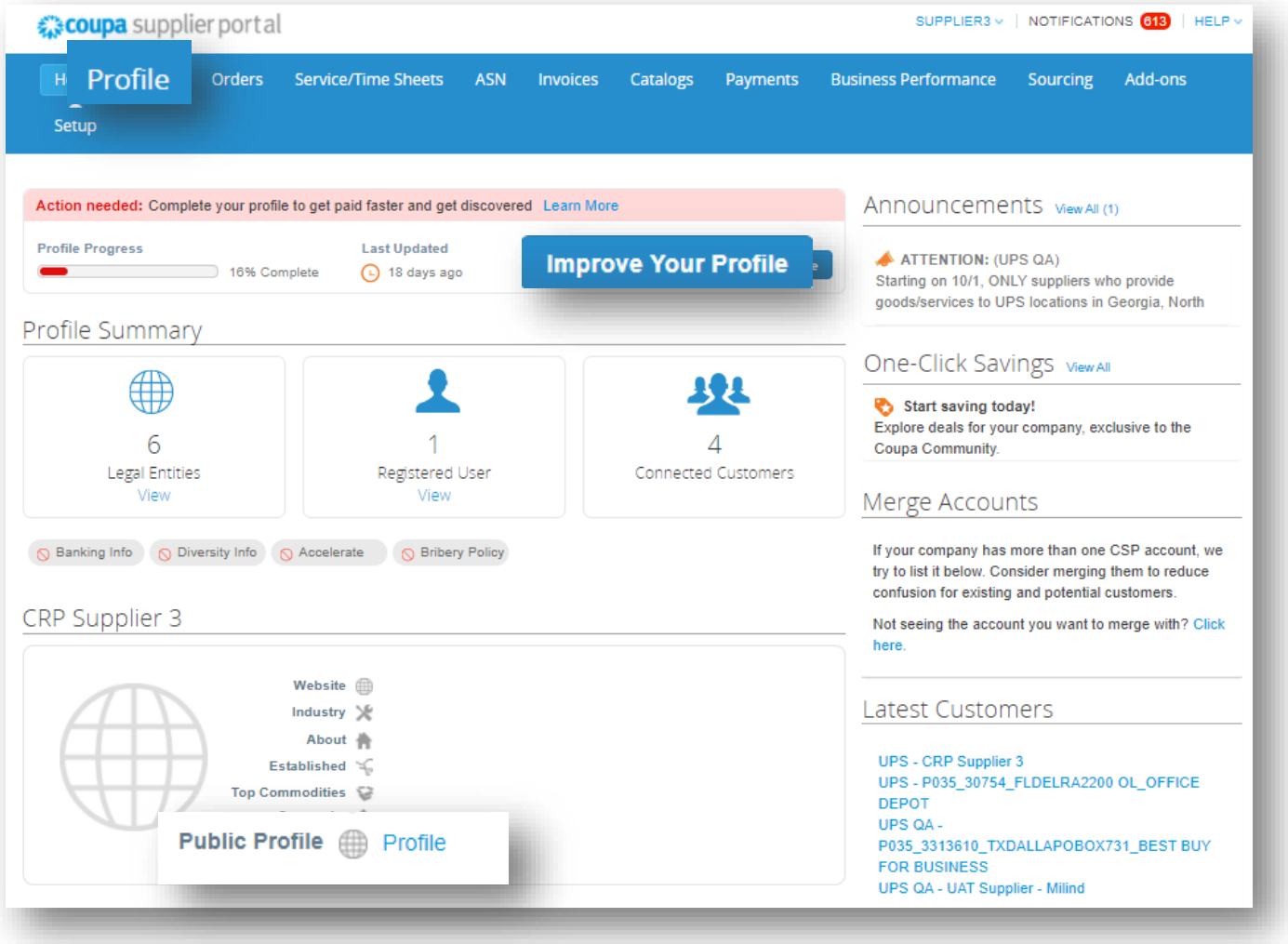
Public Profile

- 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.



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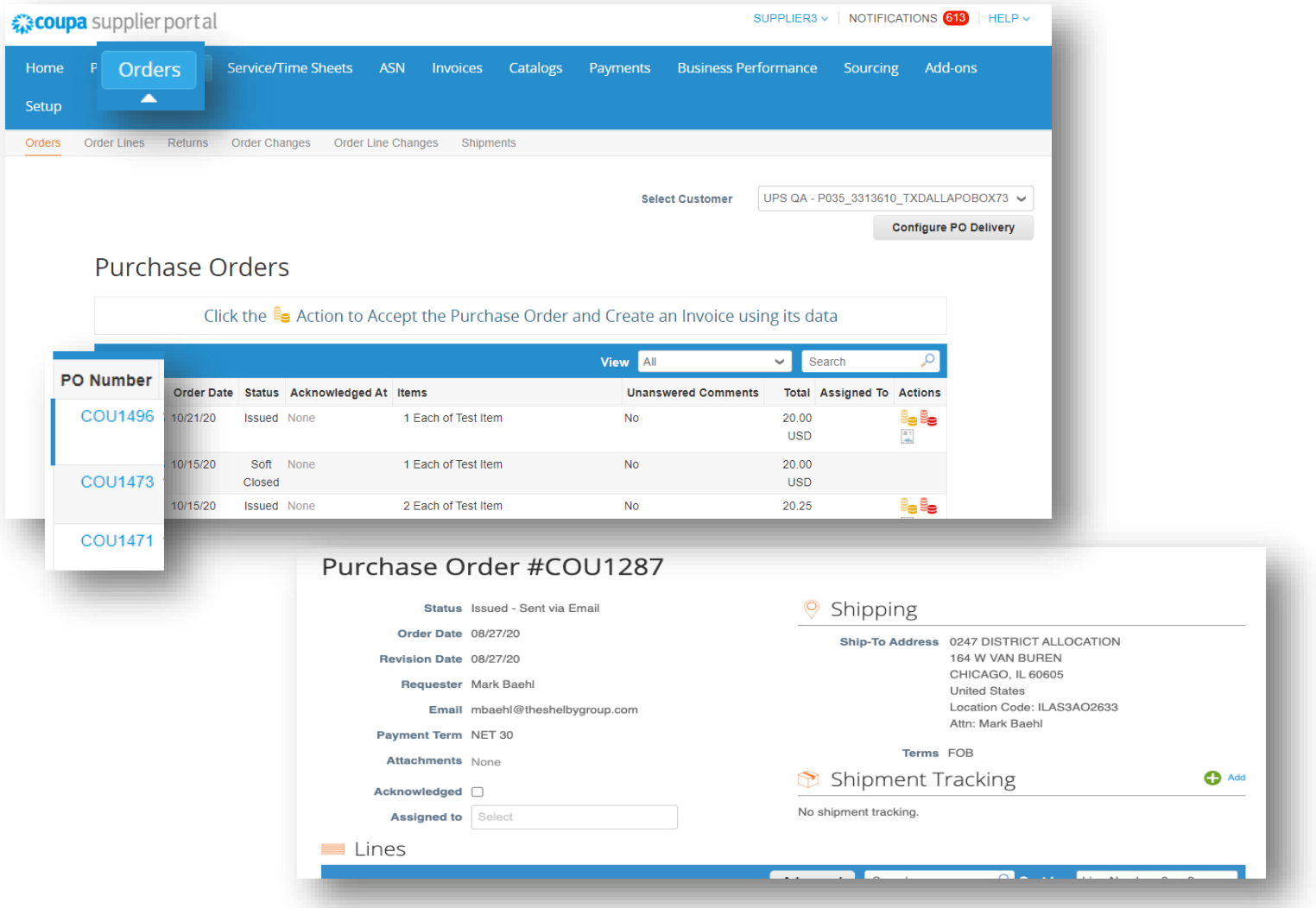
Purchase Orders

- 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.



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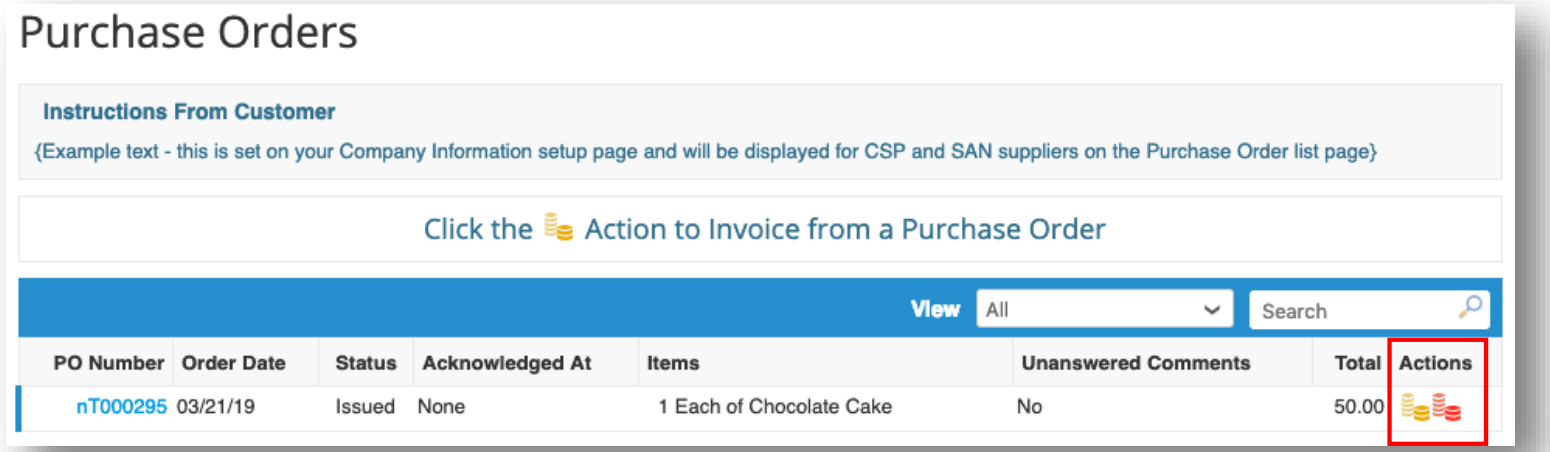
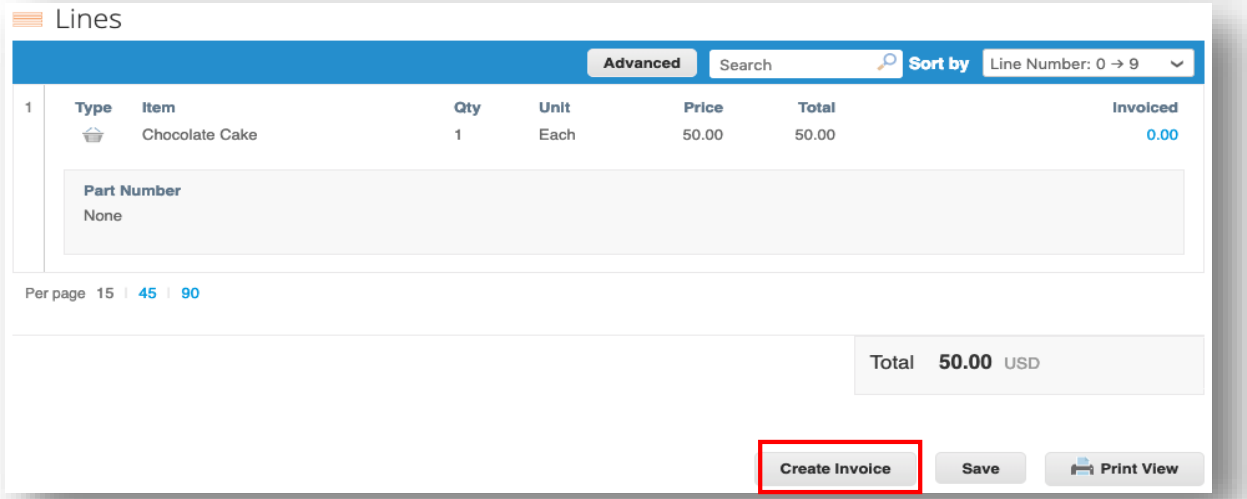
Invoices

- 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.





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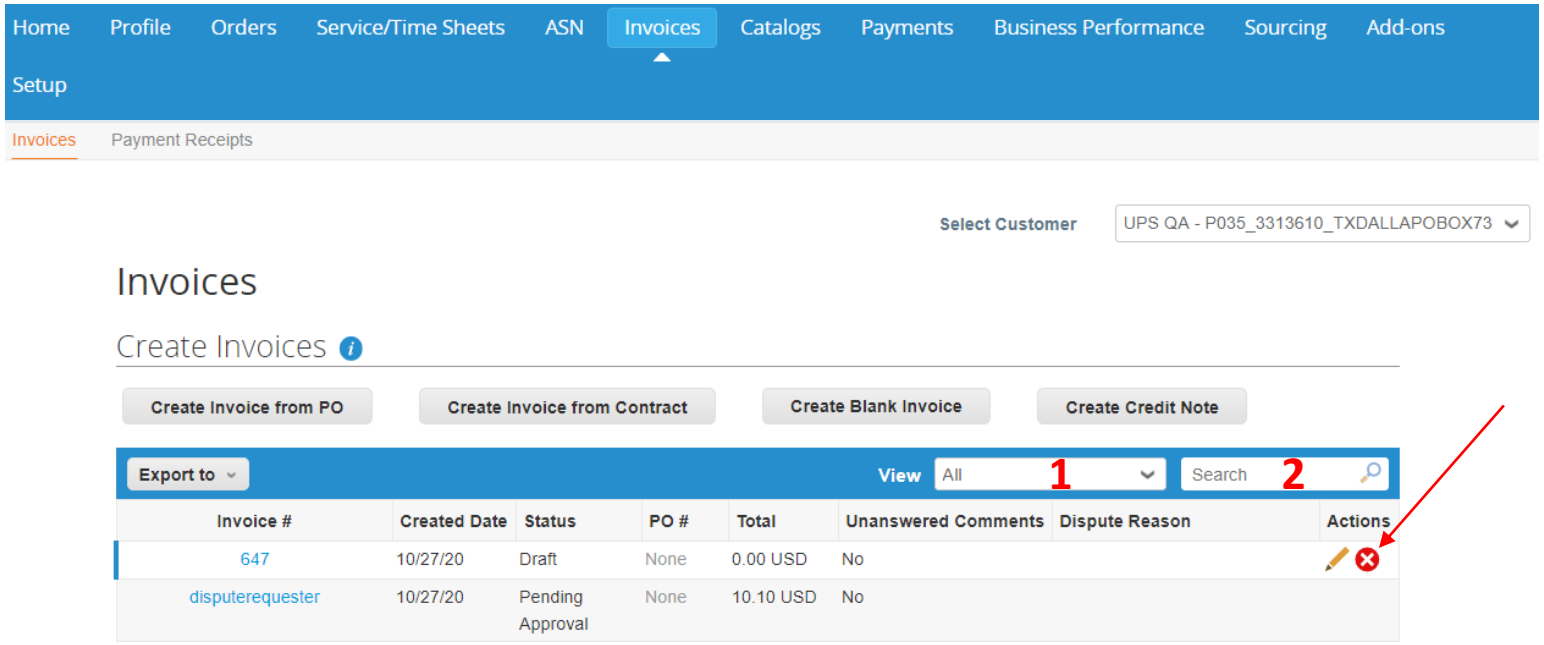
Invoices

- 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*.



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

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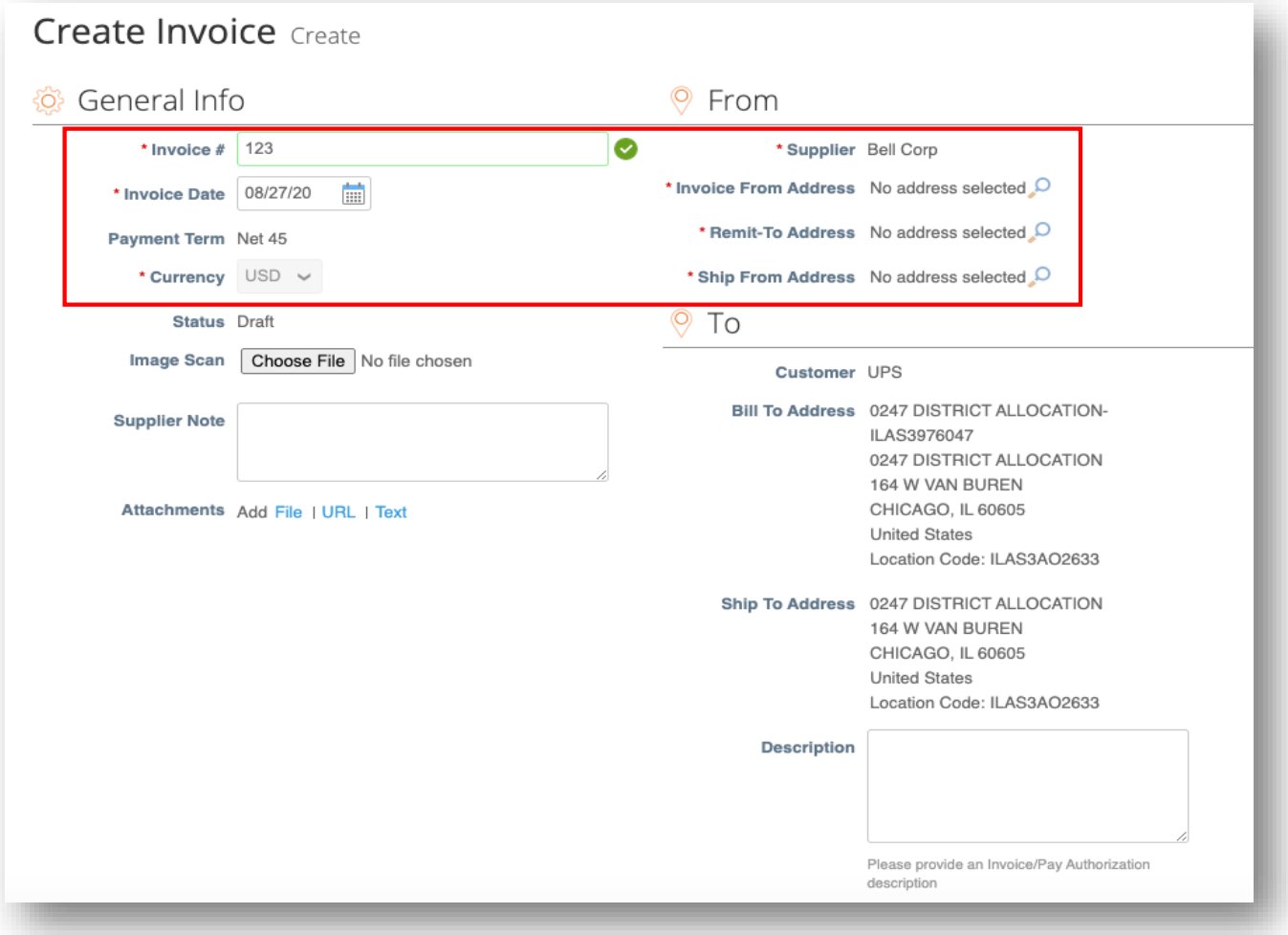
Invoice Requirements

- 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*.



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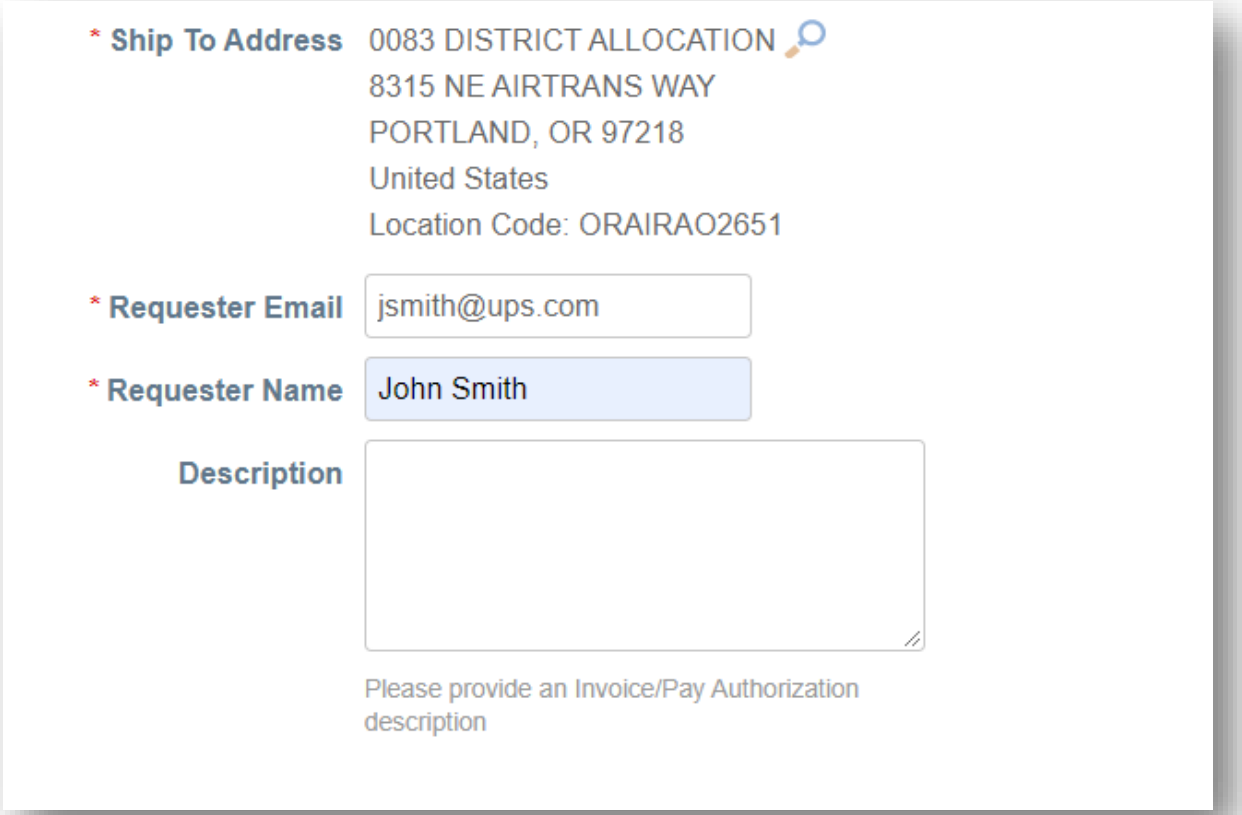
Invoice Requirements (continued)

- 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.



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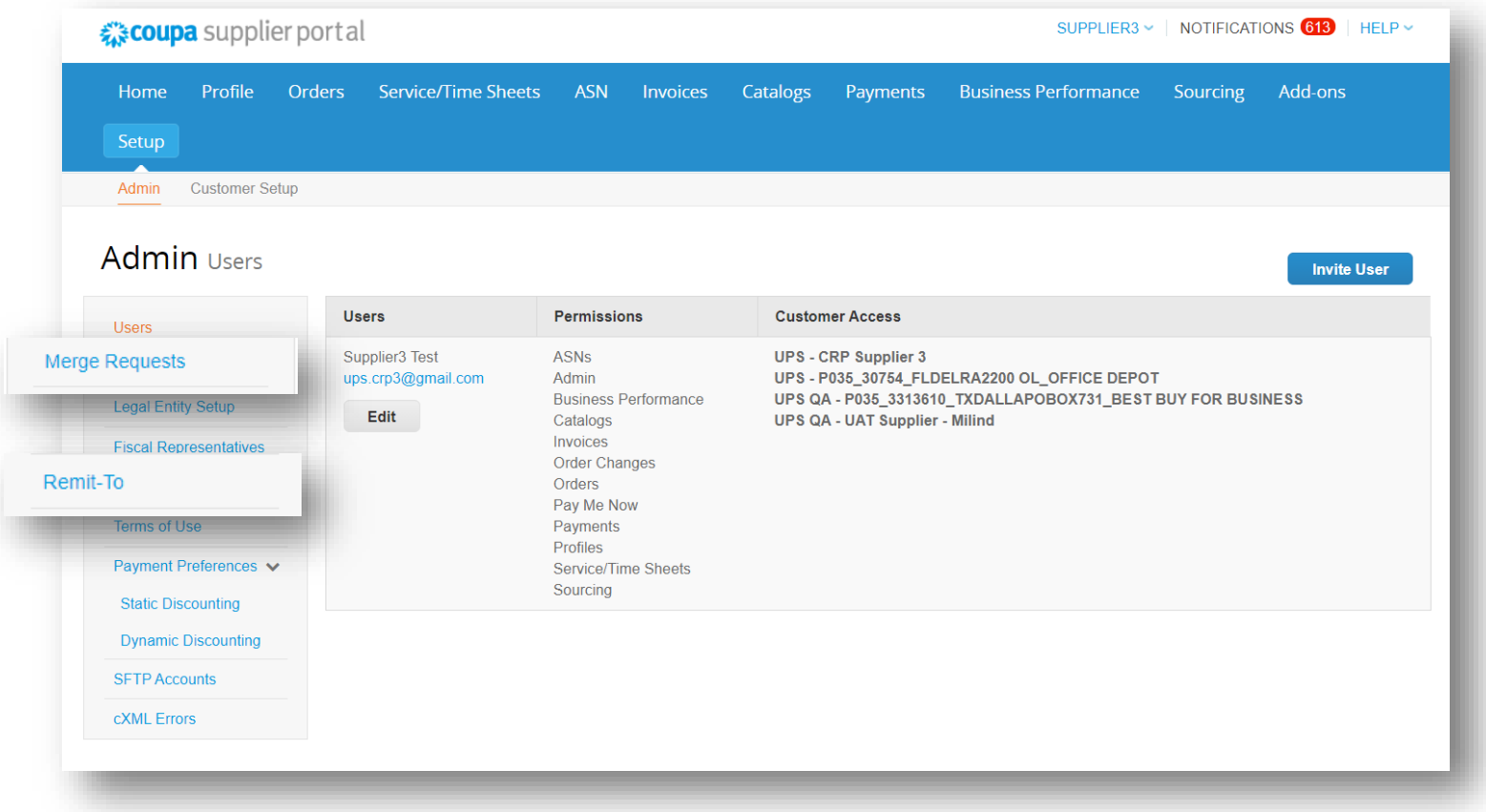
Setup - Admin

- 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.



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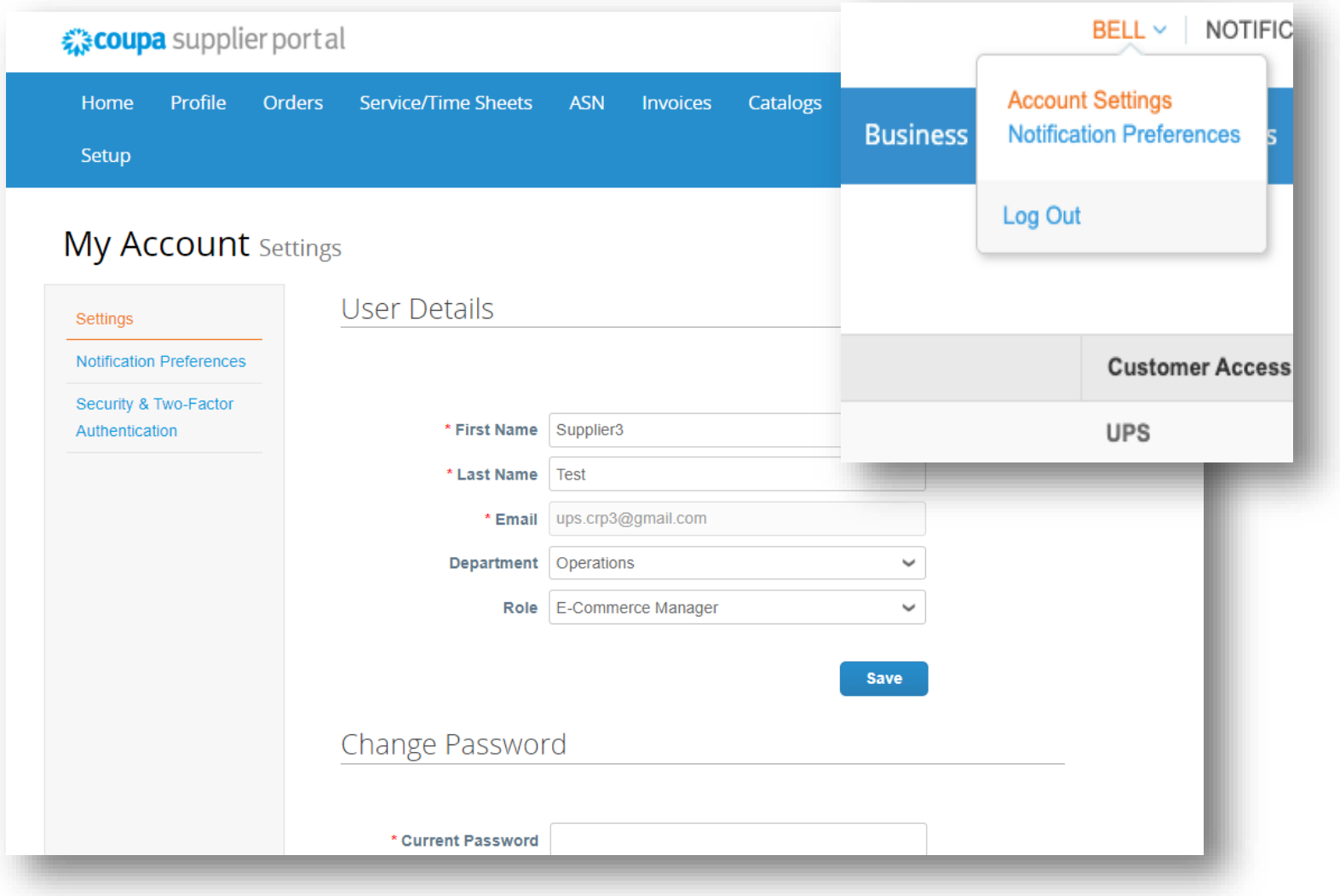
Account Settings

- 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.



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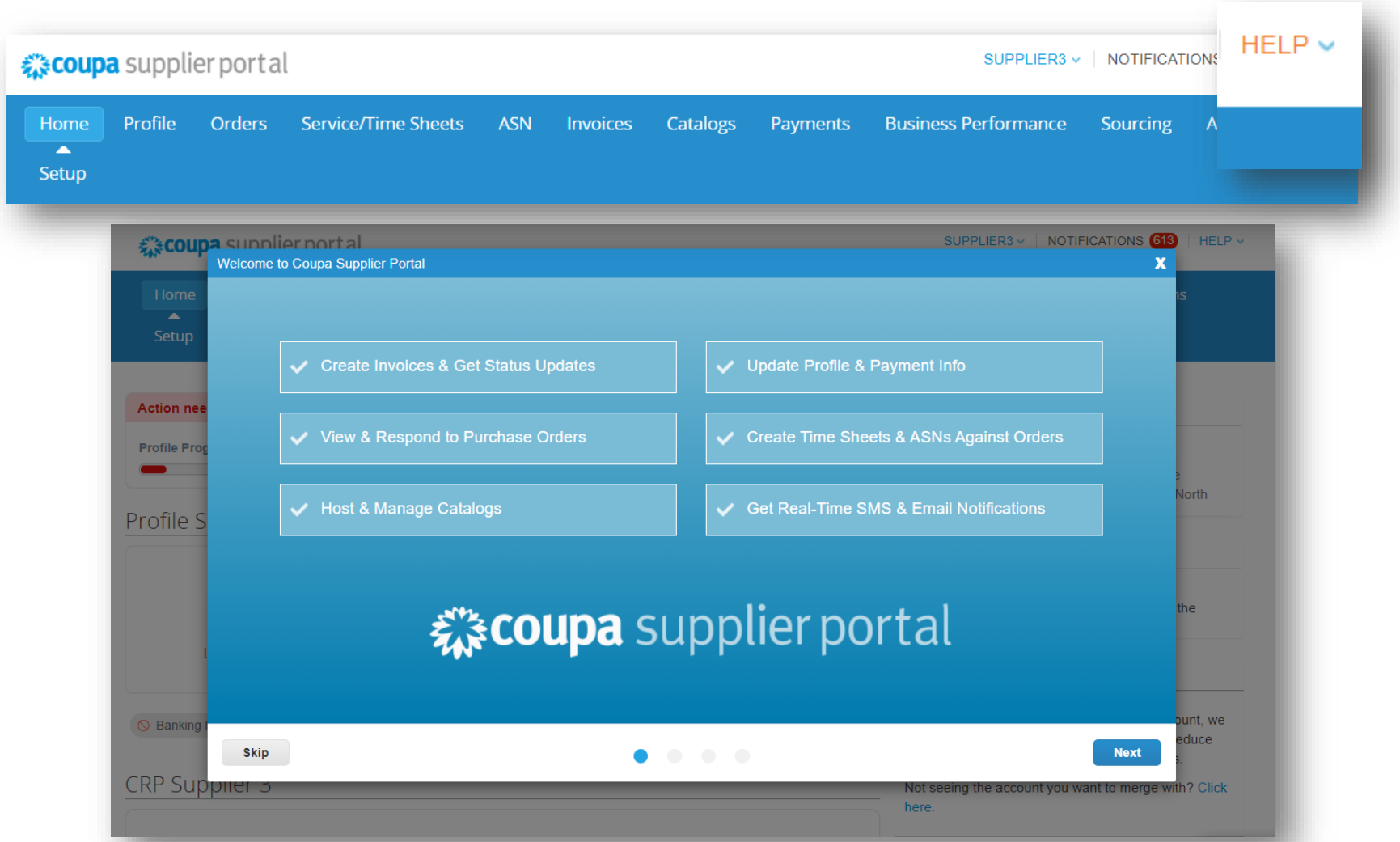
Getting Help

- 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.



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