



THE SHELBY GROUP

Coupa Supplier Portal:

Quick Reference Guide – For Suppliers



PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

Overview

- What is the CSP?
- Getting Started
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 - Orders
 - Invoices
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Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Ashland using Coupa.
- Suppliers have the ability to manage various content and settings for your Ashland profile.
- Some of the content and information that is available to manage is:
 - Manage Company Information
 - View purchase orders
- The easiest way to get set up to use the CSP is to ask Ashland for an invitation.
- Once you accept the invitation and register, you'll be automatically connected to Ashland.

Getting Started – Invitation or Self Registration

Invitation from Ashland

- You will receive an e-mail from our Coupa system with a unique link to join the Coupa Supplier Portal.
- Once you click on the link, you will be directed to the CSP to register your account.
- Save <https://supplier.coupahost.com/> as a favorites link for quick access when you need to return to the site.

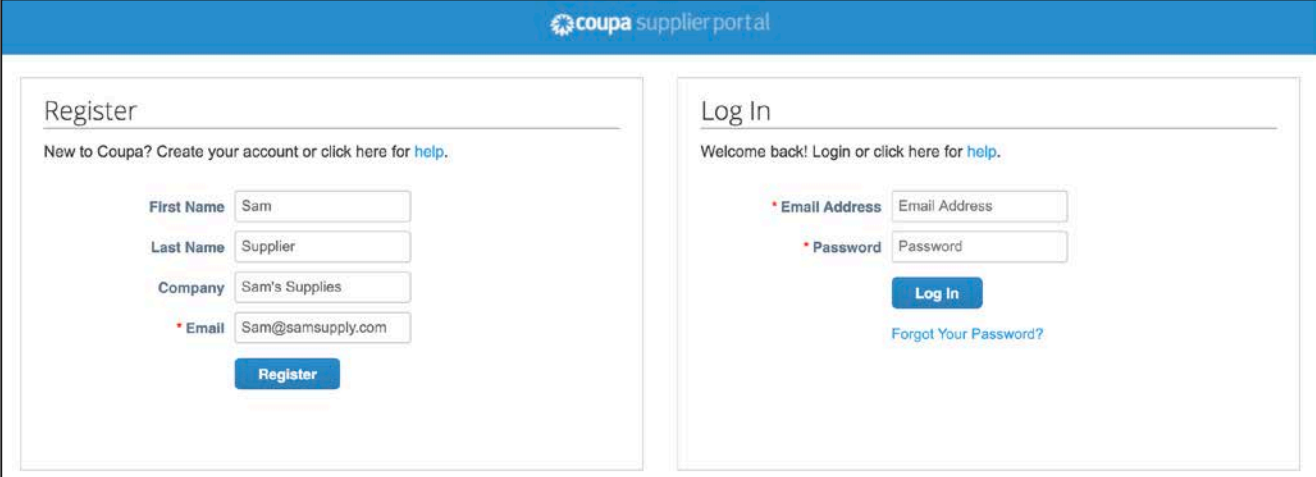
Self Registration

- Register to join the CSP yourself at: <https://supplier.coupahost.com/>
- Once registered, let Ashland know you're on the CSP, and give them the email address you used to register. Ashland needs it to get you set up within Coupa.
- If you're already on the CSP with another Coupa customer, just give your CSP email address to the Ashland Supplier Enablement team and they'll do the rest.

<h3>Register</h3> <p>New to Coupa? Create your account or click here for help.</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Company <input type="text"/></p> <p>* Email <input type="text"/></p> <p>Register</p>	<h3>Log In</h3> <p>Welcome back! Login or click here for help.</p> <p>* Email Address <input type="text" value="example@gmail.com"/></p> <p>* Password <input type="password" value="*****"/></p> <p>Log In</p> <p>Forgot Your Password?</p>
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Welcome!

- When you click on the link in the e-mailed invitation Coupa will present this welcome window for you to register on the CSP.
- Start by entering and confirming a password and acknowledging your acceptance of the Privacy Policy.



The screenshot displays the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, the page is divided into two main sections: "Register" and "Log In".

Register Section:

- Text: "New to Coupa? Create your account or click here for [help](#)."
- Form fields:
 - First Name: Sam
 - Last Name: Supplier
 - Company: Sam's Supplies
 - * Email: Sam@samsupply.com
- Button: Register

Log In Section:

- Text: "Welcome back! Login or click here for [help](#)."
- Form fields:
 - * Email Address: Email Address
 - * Password: Password
- Button: Log In
- Link: [Forgot Your Password?](#)

Home Screen

coupa supplier portal CARLY | NOTIFICATIONS **22** | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Action needed: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress 11% Complete **Last Updated** about 1 month ago [Improve Your Profile](#)

Profile Summary

- 2 Legal Entities [View](#)
- 1 Registered User [View](#)
- 4 Connected Customers

[Banking Info](#) [Diversity Info](#) [Accelerate](#) [Bribery Policy](#)

TEST SUPPLIER

Announcements [View All \(0\)](#)

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

Latest Customers

- TEST SUPPLIER
- Test CA
- Carly's Corn
- Ashland - Carly's Corn

Navigation Bar

- Reviewing, acknowledging orders or submitting invoices is simple by accessing them through the navigation bar. You can also configure your profile/account and administer your connection through the CSP.
- Access to these tabs provides you with real-time status of orders and invoices with Ashland.
- You can even communicate through the CSP to Ashland through comments section of invoices and purchase orders.

Your Public Profile


- There is a link on the homepage that will take you to your public profile and a button that you can use to update your profile.
- You can also update your profile using the profile menu button.

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. A prominent red banner at the top of the main content area reads "Action needed: Complete your profile to get paid faster and get discovered" with a "Learn More" link. Below this, the "Profile Progress" section shows a progress bar at 11% completion and a "Last Updated" timestamp of "about 1 month ago". A red-bordered button labeled "Improve Your Profile" is highlighted. The "Profile Summary" section features three cards: "2 Legal Entities" with a "View" link, "1 Registered User" with a "View" link, and "4 Connected Customers". At the bottom, there are four toggle buttons for "Banking Info", "Diversity Info", "Accelerate", and "Bribery Policy", all of which are currently turned off.



Orders

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 Accept the Purchase Order and Create an Invoice using its data

View All

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
4200003317	12/24/19	Issued	None	1 EA - each of Test Item	No	5.00 EUR	 

Purchase Orders

- Selecting the “Orders” icon from the navigation bar will take you to a screen where you can view purchases orders. This will provide a summary of all POs from Ashland. Clicking on the **blue PO number** will open another screen (right) to see the entire PO.
- Clicking on the yellow “Coins” under the Actions column will start the invoice process for that particular PO. This is explained on the next slide. The red “Coins” are used to submit a credit memo.

Purchase Order #4200003317

Status Issued - Sent via Email

Order Date 12/24/19

Revision Date 12/24/19

Requester Carly Acks

Email cacks@theshelbygroup.com

Payment Term None

Header Text None

Attachments None

Acknowledged

Shipping

Ship-To Address 500 HERCULES ROAD
 WILMINGTON, DE 19808
 United States
 Location Code: 1085
 Attn: Carly Acks


Plant 1085

Company Code 1020_NA

Terms None

Lines

Advanced Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Test Item	1	EA - each	5.00	5.00	0.00


* Need By 12/31/19 Part Number None

Incoterms Item Text Material Number
 None None None



Invoicing is initiated by clicking the Gold Coin Icon in the Purchase Order view

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 Accept the Purchase Order and Create an Invoice using its data

View: All

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
4200003317	12/24/19	Issued	None	1 EA - each of Test Item	No	5.00 EUR	 

Lines

Advanced Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Test Item	1	EA - each	5.00	5.00	0.00

*** Need By** Part Number
 12/31/19 None

Incoterms Item Text Material Number
 None None None

Per page 15 | 45 | 90

Total 5.00 EUR

Create Invoice Save Print View

Create Invoice

Create Credit Note
 Note: Ashland Prefers partial credits, unless a full credit is issued without a rebill

Invoices may also be created from an open purchase order by clicking the "Create Invoice"

Your Invoices

- Clicking on the Invoices menu button will display your invoices.
- You can filter your list view or search for a particular invoice.
- You can open any specific invoice or its associated purchase order by clicking on the appropriate blue hyperlink.

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'SAM', 'NOTIFICATIONS 1', and 'HELP' are on the right. A blue navigation bar contains 'Home', 'Profile', 'Orders', 'ASN', 'Invoices' (highlighted), 'Catalogs', and 'Admin'. Below this is a 'Select Customer' dropdown menu. The main heading is 'Invoices'. A toolbar includes an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search box. The table below has the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
TEST20170503	05/03/17	Pending Approval	204003	462.65	No	
1234567	04/11/17	Processing	204004	351.50	No	
CEW20170407-1	04/07/17	Approved	204002	7.95	No	

At the bottom of the table area, it says 'Per page 15 | 45 | 90'.

Invoicing requires filling in the details marked by an *

Create Invoice Create

General Info

* Invoice #

* Invoice Date

Payment Term

* Currency

Delivery Number

Status

Image Scan No file chosen

Supplier Note

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

From

* Supplier

Supplier Tax ID

* Invoice From Address

1933 N Meacham
ST. 220
Schaumburg, , Illinois 60169
United States

* Remit-To Address

1933 N Meacham
ST. 220
Schaumburg, , Illinois 60169
United States

* Ship From Address

1933 N Meacham
ST. 220
Schaumburg, , Illinois 60169
United States

To

Customer

* Bill To Address

PO Box 2219
Columbus, OH 43216
United States

Ashland requires a copy of your invoice or credit memo to be attached for every submission.

Admin

The screenshot shows the Coupa supplier portal interface. At the top, there's a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin' (selected). Below this is a sub-navigation bar with 'Admin' and 'Users'. The main content area is titled 'Admin Users' and features a table with the following data:

Users	Permissions	Customer Access
Carly Acks [redacted]@gmail.com Edit	ASNs Admin Catalogs Invoices Order Changes Orders Payments Profiles Service/Time Sheets	Ashland - Carly's Corn...

On the left sidebar, the following items are listed: 'Users', 'Merge Requests' (highlighted), 'Legal Entity Setup', 'Fiscal Representatives', 'Remit-To' (highlighted), 'Terms of Use', 'Coupa Accelerate Preferences', 'SFTP Accounts', and 'cXML Errors'. A red box also highlights the 'Invite User' button in the top right corner of the main content area.

- Selecting the “**Admin**” icon from the menu will take you to a screen where you can administer the users, requests, and remit to addresses for the CSP.
- Each company will have one specific CSP administrator. This is typically the person who received the request from the Ashland.
- Selecting “**Invite Users**” will provide functionality to add other users in your company to utilize the CSP. You can set their permissions and the customers they can view. You can also transfer the administrative role to another user in your company.
- Selecting “**Merge Requests**” will allow you to merge with any other CSP profiles from your company. This may happen if you have many divisions and customers using Coupa. Use this feature to keep them all together in the CSP.
- Selecting “**Remit To**” allows you to add or change your remit to address in the CSP. The remit to address prepopulated is what your customer has set-up for you in their Coupa supplier record.

My Account

CARLY ▾ | NOTIFI

Account Settings
Notification Preferences

Log Out

My Account Settings

Settings

Notification Preferences

Security & Two-Factor Authentication

User Details

* First Name

* Last Name

* Email

Department

Role

Save

Change Password

* Current Password

* Password

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

* Password Confirmation

Save

- Selecting the “Account Settings” option from the dropdown under your name will take you to a screen where you can change your log-in information for the CSP.
- In this screen you can add a photo, change your name, e-mail address and password.

Log Out

- Selecting the “Log Out” icon from the dropdown under your name will log you out of the CSP and bring you back to the log-in screen.

Getting help

- Additional training and access Coupa help is available by choosing Online Help from the Help menu in the upper right corner.
- Choosing Online Help from the menu will take you to the Coupa Supplier Portal Help pages.

The screenshot displays the Coupa Supplier Portal interface. At the top, the logo and name 'coupa supplier portal' are visible on the left, and user information 'CARLY', 'NOTIFICATIONS 23', and 'HELP' are on the right. A blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. A 'Help Tour Online Help' button is located in the top right corner. Below the navigation bar, a red banner indicates an '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 '2 days ago', with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '3 Legal Entities' (with a 'View' link), '1 Registered User' (with a 'View' link), and '4 Connected Customers'. On the right side, there are sections for 'Announcements' (with a 'View All (0)' link), 'Merge Accounts' (with explanatory text and a 'Click here' link), and 'Latest Customers'.



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