



THE SHELBY GROUP

# Coupa Supplier Portal:

Quick Reference Guide – For Suppliers



PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

# Overview

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- Getting Started
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  - Orders
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  - Admin
  - My Account
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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.coupa.com/> as a favorites link for quick access when you need to return to the site.

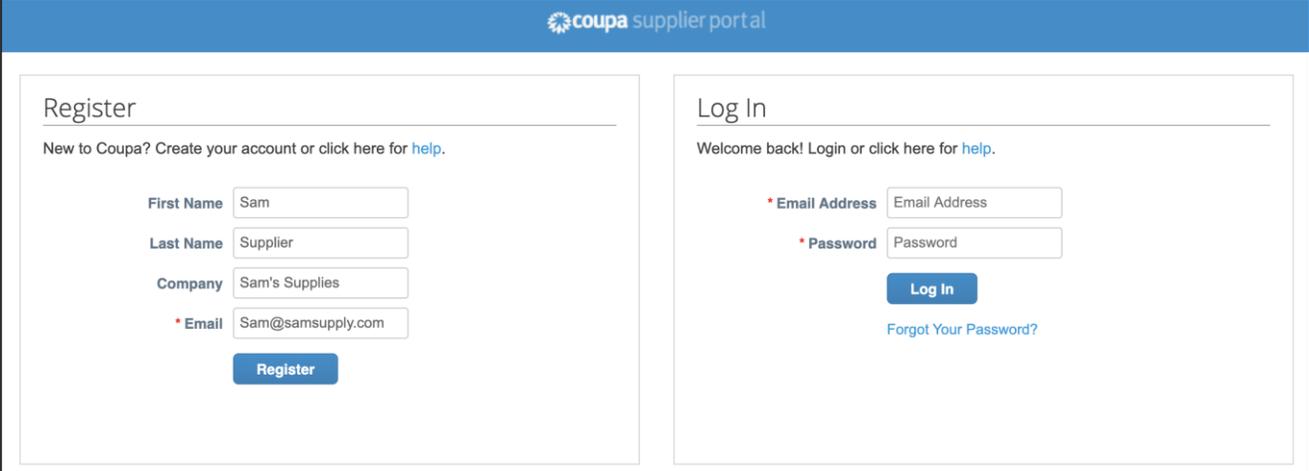
## Self Registration

- Register to join the CSP yourself at: <https://supplier.coupa.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 <a href="#">help</a>.</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><a href="#">Register</a></p>	<h3>Log In</h3> <p>Welcome back! Login or click here for <a href="#">help</a>.</p> <p>* Email Address <input type="text" value="example@gmail.com"/></p> <p>* Password <input type="password" value="*****"/></p> <p><a href="#">Log In</a></p> <p><a href="#">Forgot Your Password?</a></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 shows 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, there are 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

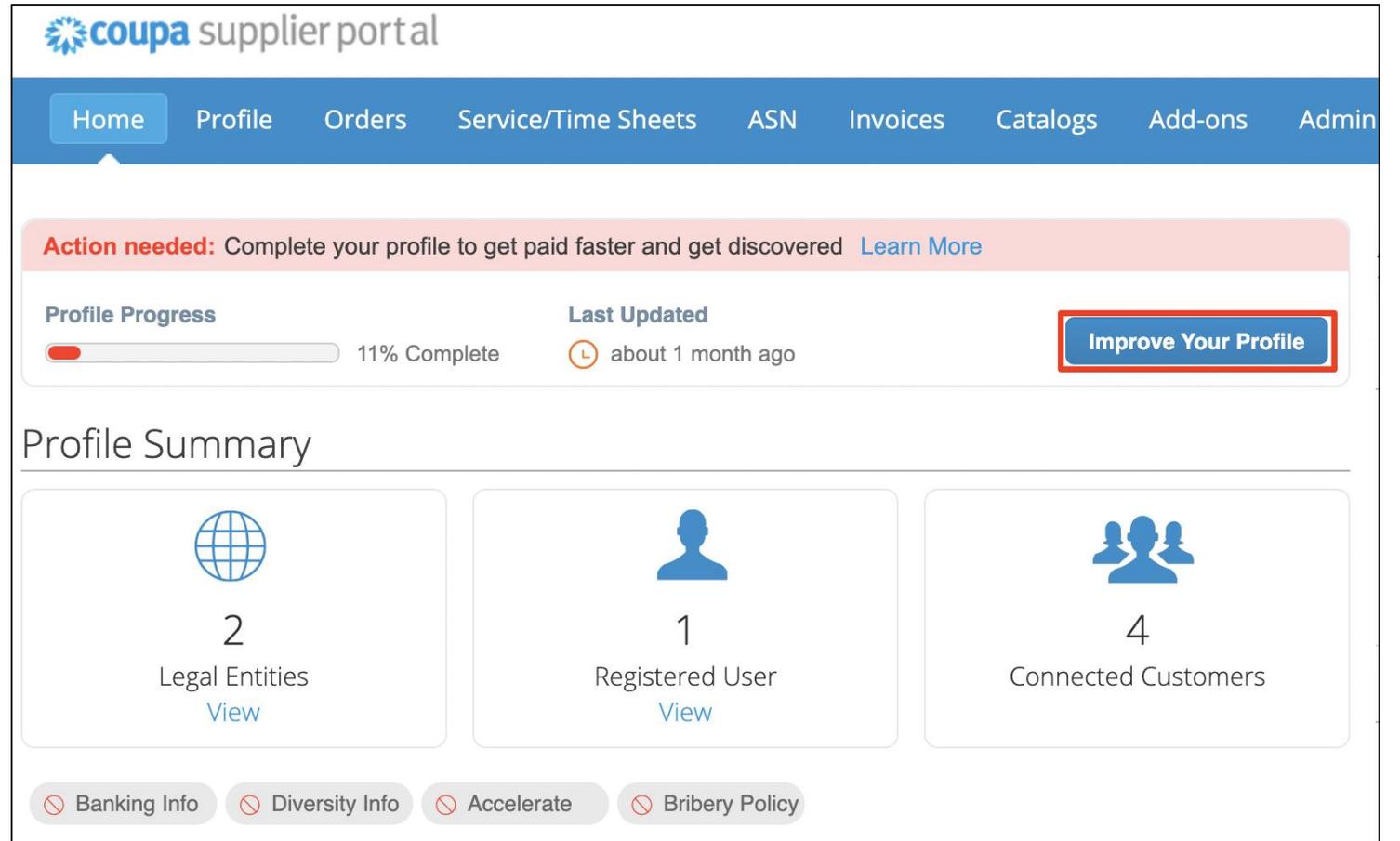
- TEST SUPPLIER - TEST SUPPLIER
- Test CA
- Carly's Corn
- Ashland - Carly's Corn

## 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 disabled.

# 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
<a href="#">4200003317</a>	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

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

Create Invoice

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 the navigation bar is a 'Select Customer' dropdown menu. The main content area is titled 'Invoices' and features a table with the following data:

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

Below the table, there is a pagination control showing 'Per page 15 | 45 | 90'. Above the table, there are controls for 'Export to', 'View All', and a search bar.

# 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
- \* Remit-To Address
- \* Ship From Address

### To

- Customer
- \* Bill To Address

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

# Admin

The screenshot shows the Coupa Supplier Portal Admin interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The Admin menu is open, showing options like Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate Preferences, SFTP Accounts, and cXML Errors. The 'Remit-To' option is highlighted with a red box. The main content area displays a table of users with columns for Users, Permissions, and Customer Access. The first user listed is Carly Acks with email @gmail.com. The Permissions column lists: ASNs, Admin, Catalogs, Invoices, Order Changes, Orders, Payments, Profiles, and Service/Time Sheets. The Customer Access column shows Ashland - Carly's Corn. There is an Edit button next to the user name and an Invite User button in the top right corner.

- 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

The screenshot displays the 'My Account' settings interface. At the top, the user's name 'CARLY' is shown with a dropdown menu. The dropdown menu includes 'Account Settings', 'Notification Preferences', and 'Log Out'. The 'Account Settings' section is currently selected and expanded, showing a sidebar with 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication'. The main content area is divided into two sections: 'User Details' and 'Change Password'. The 'User Details' section contains input fields for 'First Name' (Carly), 'Last Name' (Acks), 'Email' (carlyacks@gmail.com), 'Department' (dropdown), and 'Role' (dropdown), with a 'Save' button below. The 'Change Password' section contains input fields for 'Current Password', 'Password', and 'Password Confirmation', with a 'Save' button below. A note below the 'Password' field states: 'Use at least 8 characters and include a number and a letter.'

- 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 header includes the Coupa logo and 'supplier portal' text. On the right side of the header, there are user details 'CARLY', a 'NOTIFICATIONS' badge with '23', and a 'HELP' dropdown menu. The 'HELP' dropdown is open, showing 'Help Tour' and 'Online Help' options. Below the header is a navigation bar with buttons for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The main content area features a red banner with an 'Action needed' message: 'Complete your profile to get paid faster and get discovered' with a 'Learn More' link. Below this is a 'Profile Progress' section showing a 16% complete progress bar and a 'Last Updated' timestamp of '2 days ago', with an 'Improve Your Profile' button. The 'Profile Summary' section contains 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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