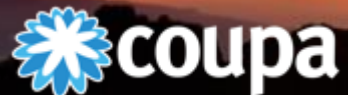


# Coupa Supplier Portal:

Quick Reference Guide – For Suppliers



PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

# Overview

- Get Started with the CSP
- Navigation
  - Invitation
  - Create Your Account
  - Login to the CSP
  - Welcome Tour
  - Getting Help
  - Manage Your Account
  - Admin
  - Home
  - Profile
  - Purchase Orders
  - Invoices



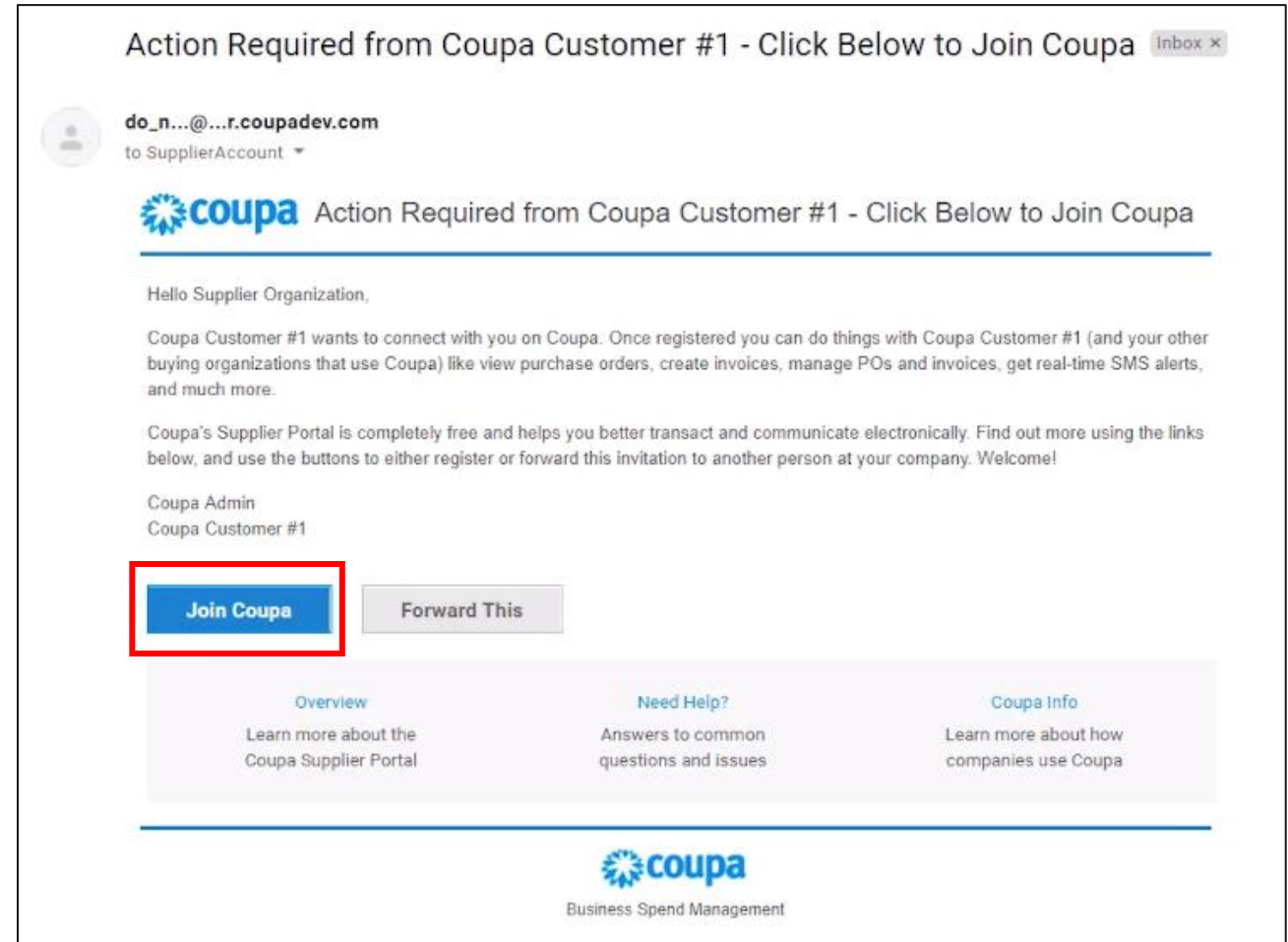
# Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Portland General Electric using Coupa.
- Signing up to the CSP is **critical** to gain access to purchase orders and process invoices
  - An email will be sent that will have directions on how to register to the CSP
- Suppliers will have the ability to manage various content and settings for your Portland General Electric 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 Portland General Electric for an invitation.
- Once you accept the invitation and register, you'll be automatically connected to Portland General Electric.

# Customer Invitation

## Invitation from Portland General Electric

- 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 **Join Coupa** button, 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.





# Create Your Account

- After following the link from the invitation email, fill in the mandatory fields to provide basic information for your account and your company's public profile.
- To create a CSP account, you must also accept the Privacy Policy and terms of use.
- By default, this account is the admin account for your Company. Once set up, you can add users and assign them roles, including account administration.
- You can invite others any time by entering their email address in the Forward email field in the Forward your invitation section and clicking Submit.

## Activate your Coupa account

brianssportinggoods22@gmail.com | Brian's Sporting Goods

### Your name

### Company

### Create a Password

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



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

Activate Coupa Account

# Login to the CSP

## Self-created invitation

- Register to join the CSP at: <https://supplier.coupahost.com>
- Once registered, let Portland General Electric know you're on the CSP, and give them the email address you used to register. Portland General Electric 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 Portland General Electric Supplier Enablement team and they'll do the rest.

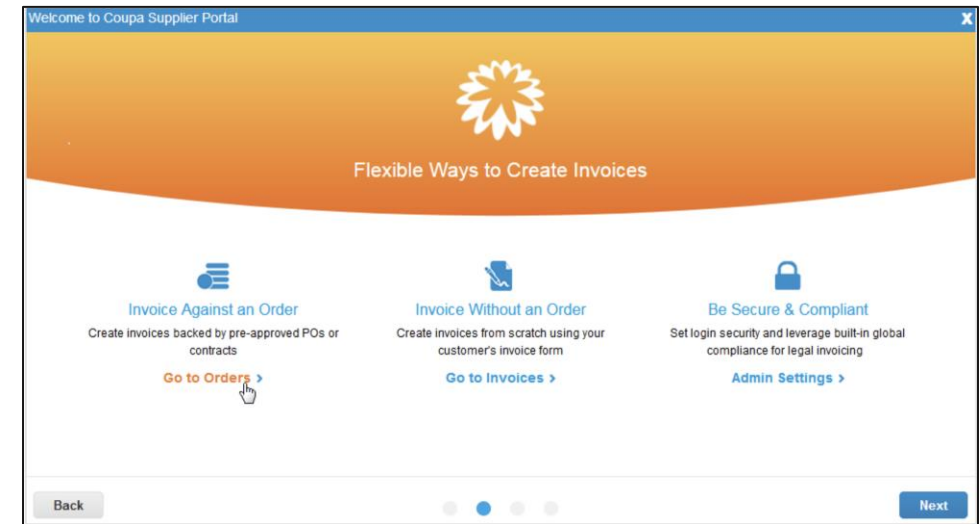
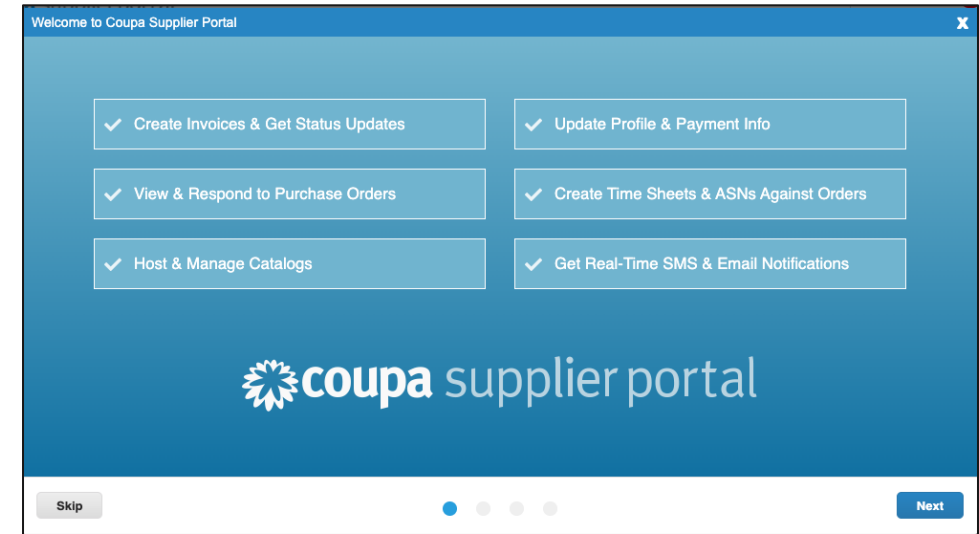
The image displays two side-by-side screenshots of the Coupa user interface. The left screenshot shows the login page with the heading 'Login to your Coupa account'. It features a 'Log in' button and a 'Sign up' button at the top. Below the heading, there are two input fields: 'Email Address' with the placeholder text 'Enter email address' and 'Password' with the placeholder text 'Enter password'. A link for 'Forgot Password?' is located below the password field. At the bottom is a large orange 'Log in' button. The right screenshot shows the sign-up page with the heading 'Sign up for your free Coupa account'. It features a 'Log in' button and a 'Sign up' button at the top. Below the heading, there are two input fields: 'Work Email Address' with the placeholder text 'Enter Work Email Address' and 'Company Name' with the placeholder text 'Enter Company Name'. At the bottom is a large orange 'Sign Up' button.

## Customer-created invitation

- If you have received the customer created invitation and have registered, you will go directly to the Log In to access the Coupa supplier Portal.
- In both cases, you receive an email invitation with different subject lines, depending on whether the invitation was sent by your customer or initiated by you. Save <https://supplier.coupahost.com> as a favorite link.

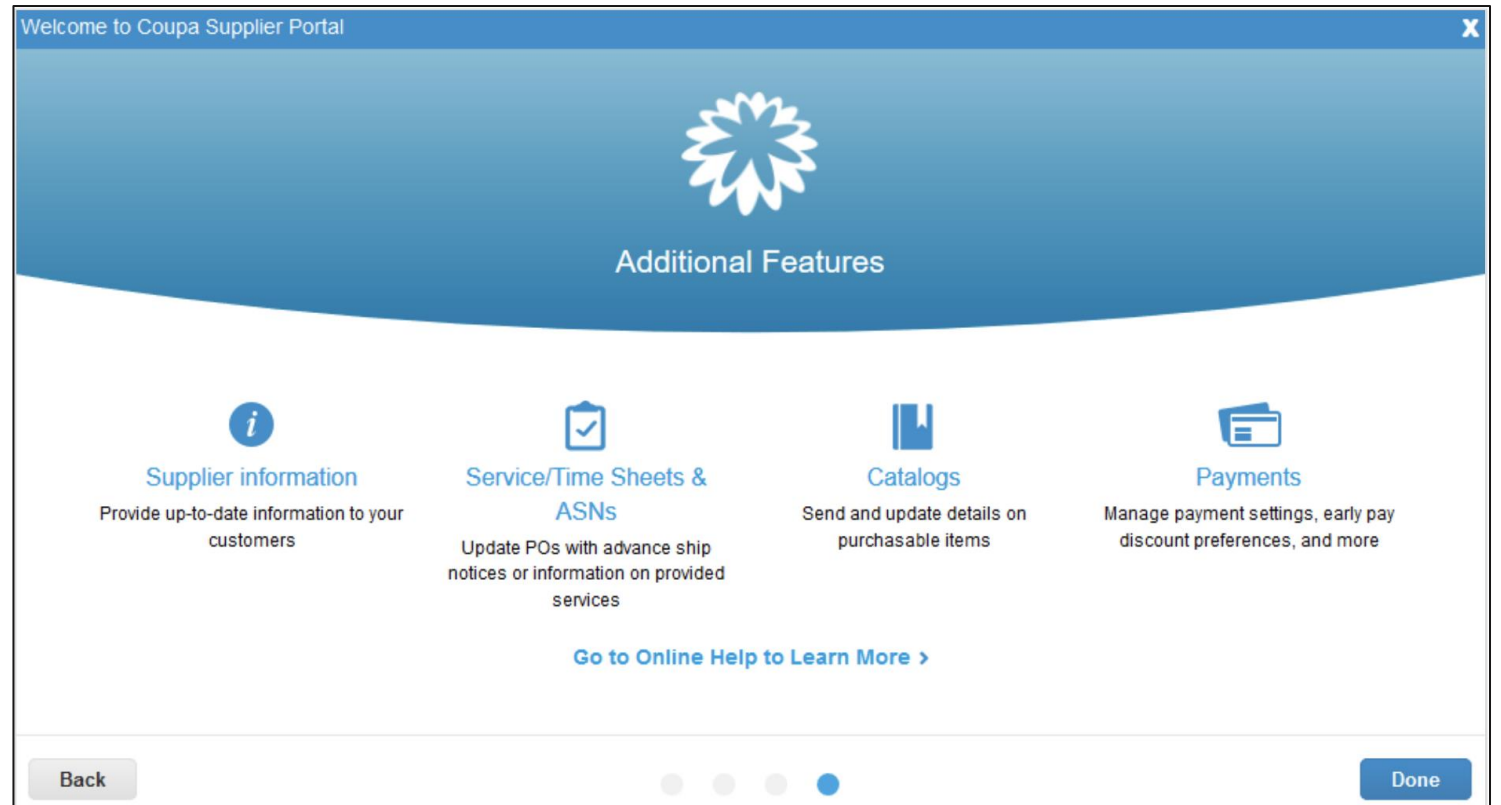
# Welcome Tour

- Once you are signed in, Coupa takes you on a welcome tour.
- You can skip the tour by clicking on the Skip button or closing the window with the X in the top right corner.
- Clicking Next takes you to the second page of the tour, which provides you with basic information on the benefits of invoicing through the CSP.



# Welcome Tour Cont.

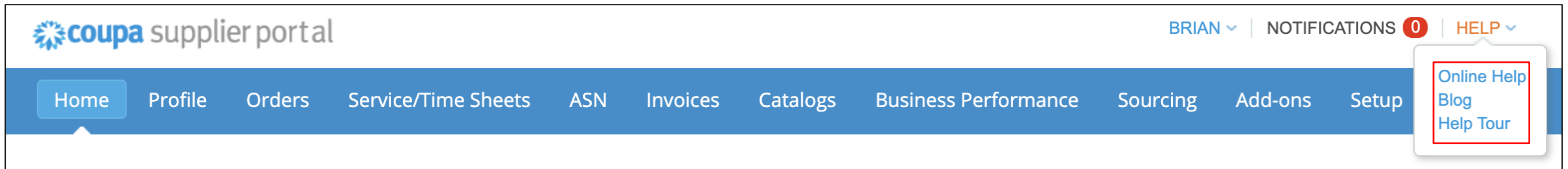
- The last page of the tour summarizes the additional features.





# Getting help

- If you skipped the Welcome Tour you can access any time by clicking on Help Tour.
- For additional help, if you click on the Online Help link, you will be directed to the Coupa Support. They will be able to assist you with any *technical* issues. For any process concerns, please follow up with your Portland General Electric contact.

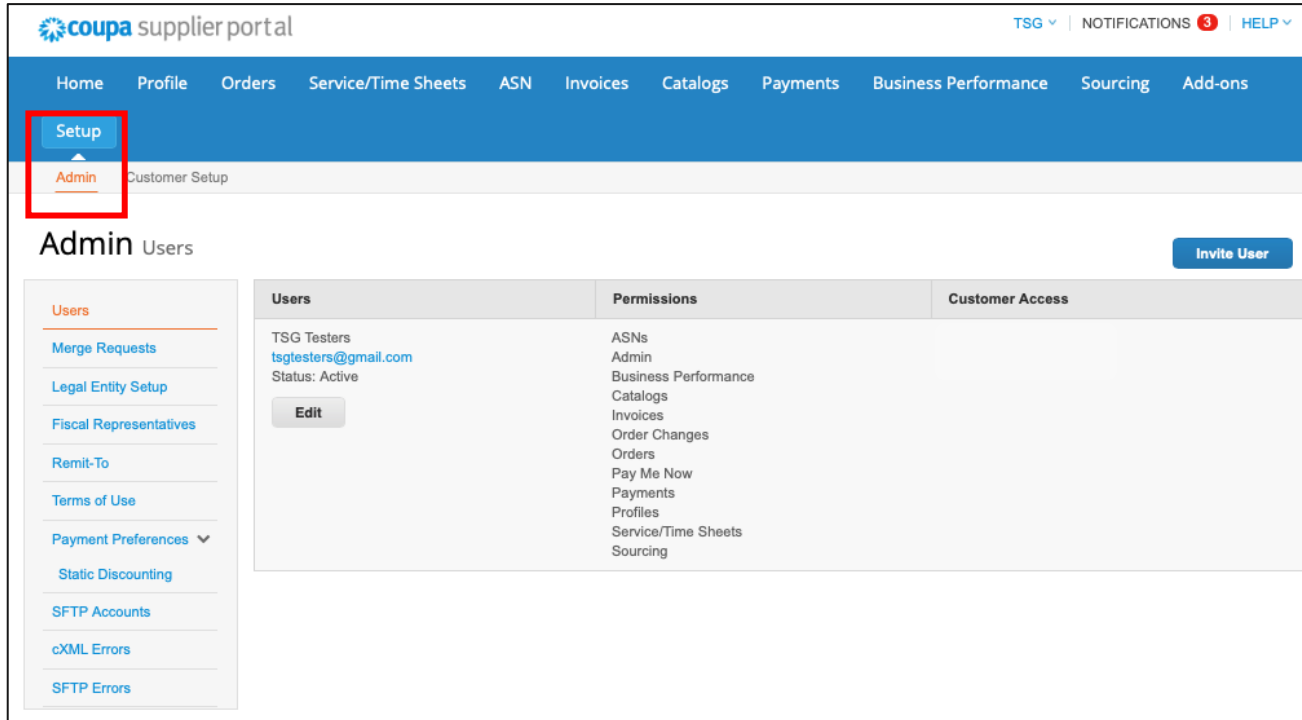


# Manage Your Account

The screenshot displays the 'My Account Settings' page in the Coupa Supplier Portal. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business, and Add-ons. A red box highlights the 'Account Settings', 'Notification Preferences', and 'Log Out' links. The main content area is divided into two sections: 'User Details' and 'Change Password'. The 'User Details' section contains input fields for First Name (Luna), Last Name (Shelby), Email (lunashelbytest@gmail.com), Department, and Role, 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 sidebar on the left lists 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication'.

- On the My Account Settings page, you can make changes to your personal information (name, department, role, and password).
- Set or modify your notification preferences.
- Security & Two-Factor Authentication - enable/disable.

# Admin



The screenshot shows the Coupa Supplier Portal Admin interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. The 'Setup' button is highlighted with a red box. Below the navigation bar, the 'Admin' section is active, showing a list of users and their permissions. The 'Users' table lists the following user: TSG Testers (tsgtesters@gmail.com, Status: Active). The 'Permissions' column lists: ASNs, Admin, Business Performance, Catalogs, Invoices, Order Changes, Orders, Pay Me Now, Payments, Profiles, Service/Time Sheets, and Sourcing. The 'Customer Access' column is empty. An 'Edit' button is visible next to the user entry. A sidebar on the left contains links for Users, Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, SFTP Accounts, cXML Errors, and SFTP Errors. An 'Invite User' button is located in the top right corner of the Admin section.

Users	Permissions	Customer Access
TSG Testers tsgtesters@gmail.com Status: Active <a href="#">Edit</a>	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	

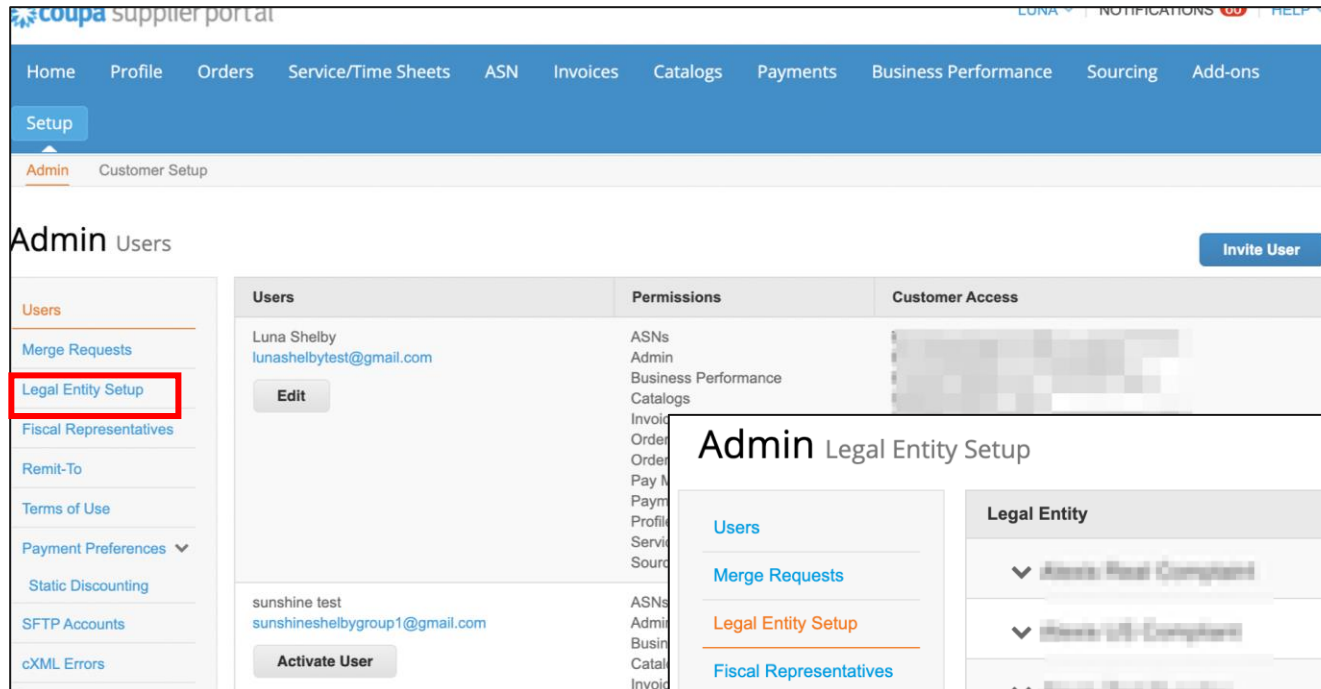
- Users - Manage permissions and customer access.
- Merge Requests - Manage accounts & merge requests.
- Legal Entities - Setup your account to create e-invoices by adding legal entities / remit-to addresses.
- Remit-to - Provide remit-to address and associated tax information to meet compliance regulations when invoicing.
- Terms of Use - View and sign the terms of use to work with the CSP.

# Manage User Permissions

The screenshot shows the Coupa Supplier Portal Admin Users page. On the left, the 'Admin Users' section has a list of users. The 'Edit' button for the user 'Luna Shelby' is highlighted with a red box. A modal window titled 'User info' is open, showing the user's details and a 'Permissions' section. The 'Permissions' section has two columns: 'Permissions' and 'Customers'. The 'Permissions' column has checkboxes for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'Payments', 'Order Changes', 'Pay Me Now', 'Business Performance', and 'Sourcing'. The 'Customers' column has checkboxes for 'All' and several individual customer names. The 'Edit' button is also visible in the top right of the modal.

- To manage the permissions of a user, first press edit on the user you would like to edit permissions for
- Selecting permissions will also adjust the view on the home page  
Example: If user has permission to invoices and orders then that user will only see those specific tabs on their CSP home page
- Next, select the permissions you would like this user to have access to
- You also have the ability to select which customers your users have access to

# Legal Entity Setup



- To create your legal entity, select legal entity setup from the Admin Bar.
- Next, select Add Legal Entity





# Legal Entity Setup (Cont.)

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

1. \* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

2.

What address do you invoice from?

3. \* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country/Region

☒ Use this address for Remit-To <sup>i</sup>

☒ Use this for Ship From address <sup>i</sup>

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location where you receive government documents. <sup>i</sup>

What is your Tax ID? <sup>i</sup>

4. Country/Region

Tax ID

☐ I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

1. First, add the name of your Legal Entity and the Country/Region that you do business in. Then Click Continue.
2. On the next screen you'll need to input some additional information.
3. Add your Invoice From address first.
  - Do note that you will be able to use the same address as your Remit-To Address and your Ship From address by leaving those boxes checked
4. Next you can enter a Tax ID and an Invoice From code, but they are not required.

**Note:** If you add any new Remit Tos or change your current Remit To, you will want to contact PGE to ensure it is fully updated for payments

# Legal Entity Setup (Cont.)

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 1234 Test Street

Address Line 2

City Schaumburg

State IL

Postal Code 60173

Country/Region United States

5.

Cancel Save & Continue

**Note:** If you add any new Remit Tos or change your current Remit To, you will want to contact PGE to ensure it is fully updated for payments

- Next, confirm the address where you would like to receive payment. Click Save and Continue on the first screen to confirm the remit to you have already set up.
- Next, you can again confirm the Remit-To you just set up. If you need to add an additional Remit-To, select the Add Remit-To button. If not, then click next.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	1234 Test Street Schaumburg IL 60173 United States	Active	Manage

6.

Deactivate Legal Entity Cancel Next

# Legal Entity Setup (Cont.)

7. Next, validate your Ship From address. If you need to add additional Ship From addresses, select the Add Ship From button and add the addresses.
  - When you are finished, press Done.
  - You will then see the green check mark letting you know that you have successfully completed the setup of your Legal Entity.

Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. [Add Ship From](#)


Title	Status	
1234 Test Street Schaumburg IL 60173 United States	Active	<a href="#">Manage</a>

7.

[Deactivate Legal Entity](#) [Done](#)

Setup Complete

1 2 3 4



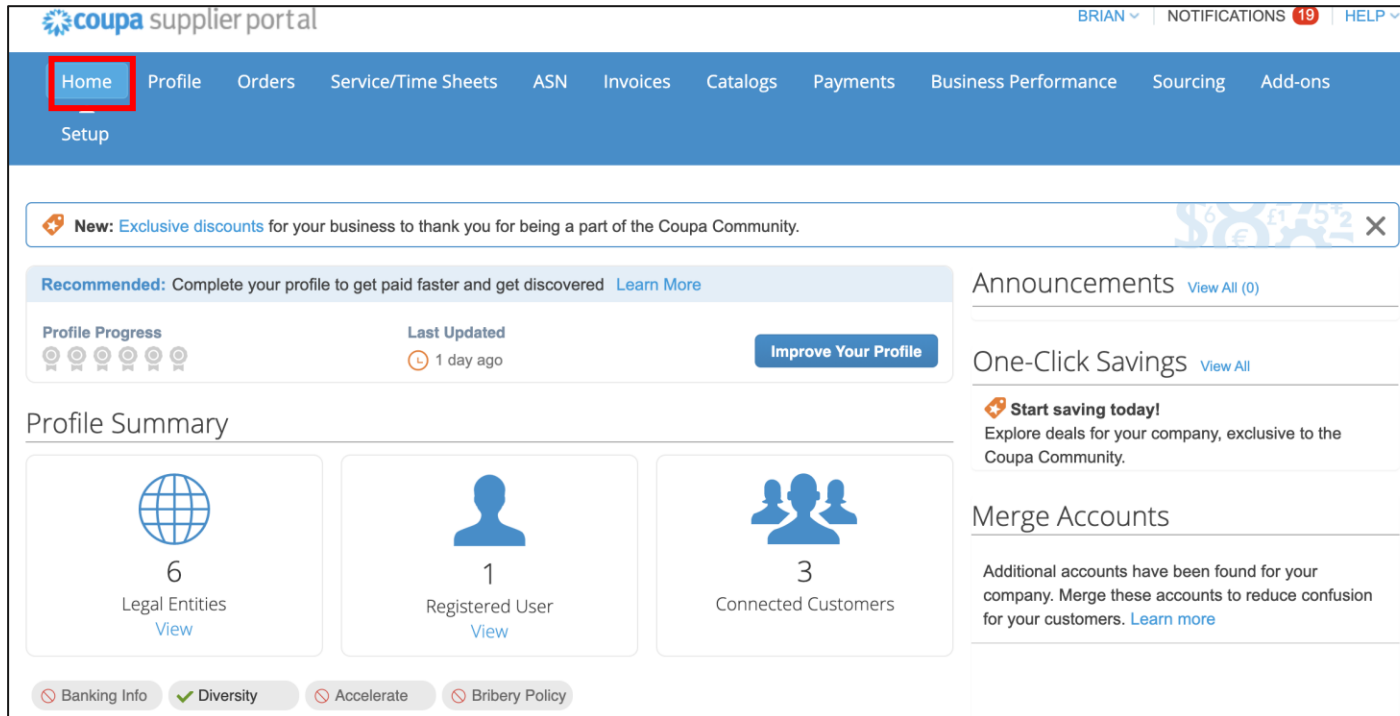
Congratulations!

This legal entity can now be used on new invoices.

Once you are invited to do business on the Coupa Supplier Portal by your customer(s), this information will be available for you to share with them and use on invoices. Request an invitation from your customer(s) today to start transacting.

[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#) [Done](#)

# Home Screen



## 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 Portland General Electric.
- You can even communicate through the CSP to Portland General Electric through comments section of invoices and purchase orders.

# Your Public Profile

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile (highlighted with a red box), Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. The user's name, BRIAN, and a notifications count of 19 are visible in the top right. The main content area is titled 'Your Profile' and shows a placeholder for a profile picture, the name 'Brian's Accessories', and a 'Download Profile as PDF' button. Below this, there's a 'Profile Level' section with a progress bar and an 'Update Profile' button. To the right of the progress bar, there's a list of profile enhancement items with 'Set up' links. The left sidebar contains links for 'Overview', 'Profile Setup', 'Learning Center', and 'Feedback'.

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

**User Information:** BRIAN, NOTIFICATIONS 19, HELP

**Profile Section:**

- Download Profile as PDF
- Profile preview | Copy profile URL

**Profile Level:**

Earn your next badge by enhancing your profile

Update Profile

**Enhancement Items:**

- Enhance your information (View)
- Who you are (Set up)
- What you do (Set up)
- What sets you apart (Set up)
- Who you work with (Set up)
- Financials (Set up)

**Left Sidebar:**

- Overview
- Profile Setup
- Learning Center
  - Add more customers
  - Create a discoverable profile
- Feedback
  - Tell us what you think

- 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.



# Purchase Orders

**coupa supplier portal** BRIAN | NOTIFICATIONS 19 | HELP

Home Profile **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

## Purchase Orders

**Instructions From Customer**  
For CA suppliers: To include Recycling Fees as part of a submitted invoice, please add an additional non-PO backed line with 'Recycling Fees' specified in the description.

Click the Action to Invoice from a Purchase Order

Export to  View All  Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
331	07/27/21	Issued	07/27/21	30 BOX of Printing Paper	No	255.00		
330	07/27/21	Issued	None	7 EACH of Monitor Replacements	No	903.00		
329	07/27/21	Issued	None	10 EACH of Printer Ink - Black	No	479.90		
313	07/26/21	Issued	None	12 EACH of Office Chairs	No	467.88		
311	07/26/21	Issued	None	2 EACH of Bulk Pens	No	199.98		

- By selecting the Orders tab in the main menu bar, the Purchase Orders page data table appears.
- From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.
- Under the PO Number column click on the number to open and view the PO.
- Click the Icons under the action's column for the following actions.
  - Gold coins flips the PO into an invoice.
  - Red coins create a credit note

# Purchase Orders Continued

## Purchase Order #6500000176

**Status** Soft Closed - Sent via Email  
**Order Date** 08/17/20  
**Revision Date** 08/17/20  
**Requester** Natalie Orozco  
**Email** norozco@theshelbygroup.com

**Payment Term** None

**Mile Post Number** None

**Attachments** None

**Acknowledged** ☐

**Assigned to** Select

Lines

### Shipping

**Ship-To Address** 315 W 3rd Street  
Pittsburg, KS 66762-4706  
United States  
Attn: Natalie Orozco  
**Plant** None

**Terms** Standard

### Lines

Advanced Search Sort by Line Number: 0 → 9							
1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Test1	1	Each	54.99	54.99	0.00
Part Number	Manufacturer Name	Manufacturer Part Number	Confirmed Ship Date				
Test1	None	None	mm/dd/yy				

Per page 15 | 45 | 90

Total USD 54.99

Create Invoice

Save

Print View

Before creating your invoice please ensure to click on Acknowledged

Adding your Confirmed Ship Date

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

# Invoices

**coupa** supplier portal

BRIAN | NOTIFICATIONS 19 | HELP

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

Setup

Invoices Invoices Lines Payment Receipts

Select Customer DEV-ICW Group

## Invoices

**Instructions From Customer**

For CA suppliers: To include Recycling Fees as part of a submitted invoice, please add an additional non-PO backed line with 'Recycling Fees' specified in the description.

Create Invoices ⓘ

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">Credit2</a>	07/27/21	Pending Approval	<a href="#">330</a>	-387.00	No		
<a href="#">Test12</a>	07/27/21	Pending Approval	<a href="#">331</a>	259.00	No		
<a href="#">None</a>	07/27/21	Draft	<a href="#">331</a>	255.00	No		
<a href="#">0842</a>	07/27/21	Pending Approval	<a href="#">330</a>	903.00	No		
<a href="#">123</a>	07/26/21	Disputed	<a href="#">313</a>	467.88	No	test	
<a href="#">Test1</a>	07/26/21	Approved	<a href="#">311</a>	202.98	No		
<a href="#">None</a>	07/26/21	Draft	<a href="#">311</a>	199.98	No		

Chat with Coupa Support

- Select the Invoices tab for the invoice page with data table to open.
- Create Invoices by selecting the following:
  - Create Invoice from PO
  - Create Invoice from Contract
  - Create Blank Invoice
  - Create Credit Note
- Select the View dropdown arrow to filter your search or enter the invoice # in the search bar.
- Open an invoice or the associated PO by clicking the Invoice # or PO # hyperlink.

*Note: Buttons are only active for actions you can do.*

# Invoices Cont.

- Fill in at least the mandatory fields (marked with a red asterisk).
- You can create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding Search (magnifying glass) icon in the From section. You are guided through creating your legal entity.
- You can attach a file to an invoice using Image Scan. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

## Create Invoice Create

General Info

From

\* Invoice #

\* Invoice Date

Payment Term

WC36-Payable in 90 days due net

\* Currency

USD

Status

Draft

\* Image Scan

Choose File

No file chosen

Supplier Note

Attachments

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

\* Supplier

Alexis Test Supplier

\* Invoice From Address

Alexis Real Complaint   
 Alexis  
 1933 N Meacham Rd  
 Schaumburg, IL 60173  
 United States

\* Remit-To Address

Alexis Real Complaint   
 Alexis  
 1933 N Meacham Rd  
 Schaumburg, IL 60173  
 United States

\* Ship From Address

Alexis Real Complaint   
 Alexis  
 1933 N Meacham Rd  
 Schaumburg, IL 60173  
 United States

To

Customer

\* Ship To Address

315 W 3rd Street  
 Pittsburg, KS 66762-4706  
 United States

Plant

None

Invoice Ship Date

mm/dd/yy

# Invoices Cont.

**Totals & Taxes**

Lines Net Total	75.99
Shipping	<input type="text"/>
Handling	<input type="text"/>
Tax	<input type="text" value="0.00"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	75.99
<b>Total</b>	<b>75.99</b>

- Enter any Shipping, Handling and/or Tax if applicable then click calculate for your total
- Click submit to sent the invoice to your customer

***Note:** Changing the quantity of pricing is possible but may trigger approval notifications to Portland General Electric and potentially delay payment processing*