COUPA SUPPLIER PORTAL (CSP)

TRAINING GUIDE

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01

COUPA INTRODUCTION

What is Coupa?

Ultradent Products has selected Coupa as the platform to streamline the Procure To Pay(P2P) process and enable electronic Purchase Order and Invoice transmission.

- Coupa is a leading e-Procurement platform, connecting UPI with suppliers.
- Coupa is an internet-based solution capable of accommodating a variety of different systems.
- The Coupa Supplier Portal (CSP) will be utilized by UPI for supplier onboarding and to transmit purchase orders (PO) and invoices.
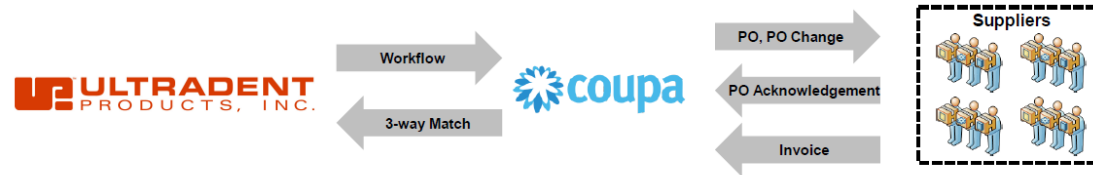
Benefits of using the Coupa Supplier Portal:

1   Better Transaction Status: Track all your Coupa transactions such as PO's, invoices, and credit memos.

2   Automated PO Transmission: Coupa will notify suppliers that a PO was transmitted. Suppliers can receive and acknowledge a PO through email or CSP.

3   Manage Invoices: Supplier can issue invoices and credit memos through the CSP or by emailing pdf copies to ap@ultradent.com.

4   Basic Profile Establishment: Use the platform as a self-serve tool to manage contacts, addresses, and legal entity information.

5   The CSP is Free! There is no cost for suppliers to use the portal.

Coupa Supplier Portal (CSP) is accessible @ **https://supplier.coupahost.com/**
Coupa Hosted Training content is available @ **https://success.coupa.com/Suppliers/For_Suppliers**

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Key Terminology

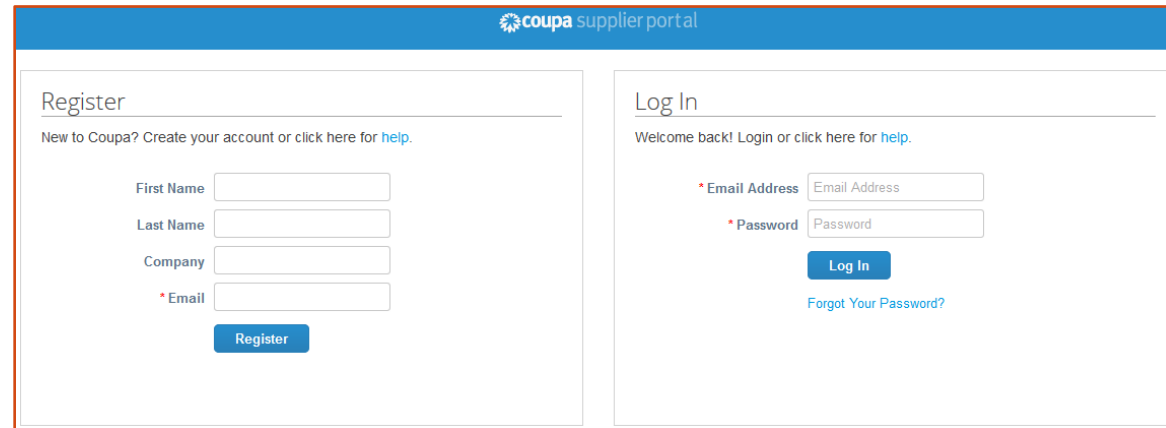| Terms	Description
Coupa Supplier Portal(CSP)	A website portal for suppliers to manage business with customers. Suppliers can view & track the PO's issued by Ultradent, as well as create & manage the invoice/credit memos on the portal.
Purchase Order (PO)	A legal document sent from a customer to a supplier, committing UPI's purchase of goods &/or services.
PO Acknowledgement (POA)	To receive and confirm the PO, after which the effectiveness of the PO will be admitted.
Advance Ship Notice (ASN)	Advance notification of a shipment to the customer.
Invoice	Billing document issued to UPI, stating financial obligations for goods received or services performed.
Disputed Invoice	An Invoice has been rejected and sent back by the customer. Suppliers can re-submit the new invoice.
Credit Note	An Invoice with a negative value offering a credit to the customer.
UPI	Abbreviation for Ultradent Products, Inc.

02

GETTING STARTED IN CSP

Getting Started – Pg. 1

Customer-created invitation
During supplier onboarding, an invitation to join the CSP will be sent by email.

Self-created invitation
Go to supplier.coupahost.com and in the Register pane on the left, fill in the mandatory (email) field (marked with an asterisk), and then click Register to request an invitation.
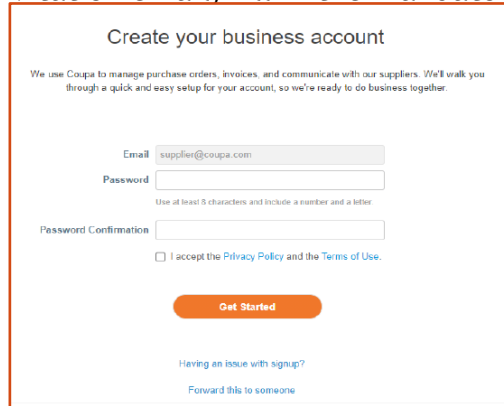

In both cases, you will receive an email invitation. If you do not receive your invitation email, check your spam folder.

The email will contain instructions and links for joining the CSP. Each email sent from the customer will contain useful information and links for maintaining the supplier account or submitting information requested by UPI.

Getting Started – Pg. 2

Join the CSP

After following the link from an invitation email, fill in the mandatory fields to provide basic information from your account and your company's public profile.
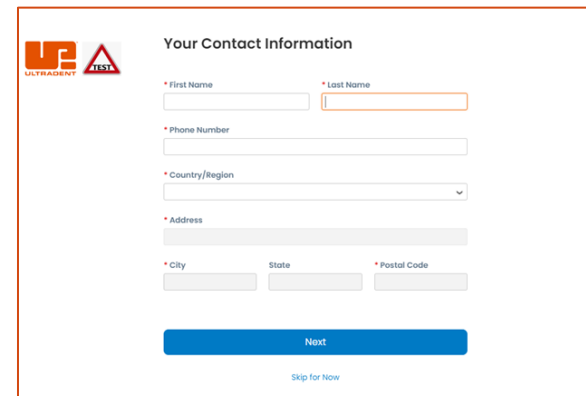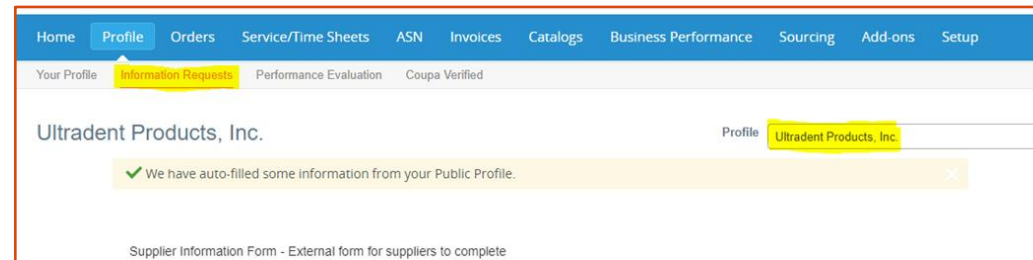
After updating your profile, you will be prompted to provide additional information that UPI has requested. Follow that link or go to the Information Requests header. Make sure the Profile shows Ultradent Products, Inc. as the customer.

Fill out all required fields under Information Requests. Click submit when finished. Once UPI approves the submitted forms, you will be ready to transact. Reach out to your UPI contact for questions.

Getting Started – Pg. 3

Two-Factor Authentication (2FA)

- During your first log-in, the User will be prompted to enable 2FA. 2FA is a security system that required two distinct forms of identification to access something.

- It strengthens your Coupa Account security by asking for 2 types of information – Password and Personal Identification Number (PIN) or Code generated from Google Authenticator Application.

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Getting Started – Pg. 4

Linking Coupa Account (CSP) with UPI

1. Click on Setup
2. Click on Connection Request
3. Click on Search
4. Write "Ultradent Products" in the Customer Name field.
5. Click on the "Search" icon
6. Enter below in Customer Contact Field
   Mropurchasing@ultradent.com
7. Click Checkbox "I'm not a robot"
8. Click on the "Request" tab

Getting Started – Pg. 5

Inviting Additional Users on the CSP

1. Click on Setup
2. Click on Admin
3. Click on Invite Users
4. Enter First Name, Last Name & Email
5. Click on the checkbox to control the permissions & access

For more information, follow this link:
Manage Users - Coupa Success Portal

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Getting Started – Pg. 6

FAQ – Registration

1.   Why am I not receiving the email invitation to join Coupa?
(Answer) Check your spam/junk email folder, emails sometimes get flagged as spam.

2.   I am already using the CSP for other customers. Can I use the same account for UPI?
(Answer) Yes, you can use the same account. Please send a link request to UPI via your existing CSP Account.

3.   Can we register more than one person for Coupa?
(Answer) Yes, you can register as many participants as you like to the CSP.

4.   Is the CSP free for suppliers?
(Answer) Yes, the CSP is free for suppliers with no limit on the number of transactions. You may be prompted to "Get Verified." This is not required to use the portal and can be ignored.

5.   Who do we contact for questions?
(Answer) Begin with contacting Coupa Support using their chat feature through the CSP. If they are unable to help you, contact UPI's Coupa admin.

💬 Chat with Coupa Support

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Getting Started – Pg. 7
Home Page Overview

Home: View and improve the public profile and see the list of connected companies.

Profile: Create and manage your profile, including addresses and contacts.

Orders: View and access the PO's you received from different customers.

ASN: Create Advance Ship Notices.

Invoices: Create and manage invoices.

Setup: Manage users, legal entity, merge requests, etc.

Settings & Notifications: Account settings and notifications can be viewed and customized. Note: Removing the notification for new orders may prevent duplications of orders since UPI emails copies of PO's.

03

TRAINING MANUAL

Purchase Orders – Pg. 1
View UPI Purchase Orders (PO)

- Supplier will receive an email notification whenever a PO is sent to their primary email registered with UPI & the CSP account users. (Unless the supplier has unchecked this notification)
- View Order: Click this button on the email to get an electronic view of the PO.

To view a Purchase Order in the CSP:
1. Log into CSP.
2. Click on the Orders tab on the CSP homepage. The Purchase Orders page will appear.
3. Select Ultradent Products from the Select Customer drop-down list in the top right corner.
4. Filter the table by columns, use the search bar to find a specific PO OR click on the View drop-down list to select a filter option.
5. For more details on a specific PO, click on the PO number hyperlink to open the PO details.

Purchase Orders – Pg. 2
View PO Lines

- Click on the Order Lines tab to see information on the PO lines for each PO.
- From the Select Customer drop-down, select Ultradent Products.

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

Orders   Order Lines   Order Changes   Order Line Changes

Select Customer   Coupa ⌄

Configure PO Delivery

Purchase Order Lines

Export to ⌄   View All ⌄   Search 🔍

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
3050	1	Issued	200 Each of Purple Spiral Notebook	100	100.00
3048	3	Issued	1 Box of Pen 101	1	90.00
3048	2	Issued	1 Box of Pen 102	1	80.00
3048	1	Issued	1 Box of Pen 103	1	100.00

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Invoices – Pg. 1
View Invoices

To view Invoices in the CSP:
1. Log into CSP.
2. Click on the Invoices header on the CSP homepage. The Invoices page will appear.
3. Select Ultradent Products from the Select Customer drop-down list in the top right corner.

Invoices – Pg. 2
Create Invoice from PO

1. Go to the Orders page, or, on the Invoices page, click on the Create Invoice from PO button which will take you to the Orders page.
2. On the Orders page, do one of the following:
   - Click on the Create Invoice (   ) icon for the PO in the Actions column of the Purchase Orders table.
   - Click on the PO Number link to open the purchase order and click on the Create Invoice button.
3. Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address.
4. On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO.

NOTE: This is the best option for creating invoices since Ultradent requires a PO.

Purchase Order #3050

Status	Issued - Sent via Email
Order Date	05/31/17
Revision Date	05/31/17
Requester	FirstName LastName
Email	FirstNameLastName@coupa.com
Payment Term	Net 30 Accelerate Payment
Attachments	None
Acknowledged	☐

Shipping

Ship-To Address 1855 South Grant Street
San Mateo, CA 94402
United States
Attn: FirstName LastName

Terms None

Lines

Advanced | Search | Sort by | Line Number: 0 → 9

	Type	Item	Qty	Unit	Price	Total	Invoiced
1		Purple Spiral Notebook	200	Each	0.50	100.00	0.00

Part Number
None

Per page 15 | 45 | **90**

Total **100.00** USD

Create Invoice | Create Service/Time Sheets | Request Change | Save | Print View

Comments

Add Comment

Select Customer Coupa ▾

Invoices
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
123	06/01/17	Draft	3050	113.20	No		🖉 ⊗
456	06/01/17	Disputed	None	150.00	No		
789	05/27/17	Pending Approval	2949	3,750.00	No		
121314	05/16/17	Approved	2891	15,000.00	No		

Per page 15 | 45 | 90

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Invoices – Pg. 3
Create a credit note

1. Click on the Create Credit Note button above the Invoices table on the Invoices page or, on the Orders page, click on the Create Credit Note(🪙) icon for the PO in the Actions column of the Purchase Orders table.
2. In the appearing Credit Note popup, select the reason for your credit note.
   - Resolve a dispute – if the credit is related to a problem with an invoice or the good shipped, select the Resobe issue for invoice number button and select the invoice number from the drop down. Click Continue to select how you want to resolve the issue.
   - You can choose to issue a credit to cancel and optionally correct the invoice or to adjust it.

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ⦿ Resolve issue for invoice number   [Select an Option ⌄]
          ○ Other (e.g. rebate)

[Cancel] [Continue]

Credit Note ✕

How do you want to correct invoice "123456789" ?

⦿ Completely cancel the invoice with a credit note ⓘ
○ Adjust invoice with a credit note ⓘ

[Cancel] [Create]

Invoices – Pg. 4

Edit an Invoice

1. Fill in the mandatory fields(marked with a red asterisk) on your invoice.
2. If you create or edit a credit note or a PO-backed invoice, some of the fields are pre-populated with information from the original invoice or the PO.
3. You might be required to accept the PO and the following restrictions might apply to the corresponding invoice because they cannot be changed from what appears on the PO:
   - Currency
   - UOM
   - Price
   - Quantity
   - Amount
4. To edit a draft invoice, do one of the following:
   - Click on the Edit (✏) icon for the invoice in the Invoices table.
   - Click on the Invoice # link to open the invoice and click on the Edit button.

For additional help, follow this link for a CSP guide available in multiple languages:

https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal

THANK YOU!