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# Coupa Supplier Portal – Quick Reference Guide

Sept 2025

coupa

# Introduction to Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free instance of Coupa made available to suppliers and designed to streamline the procurement process
- Signing up to the CSP is critical as it allows suppliers to more efficiently monitor purchase orders and process customer invoices
  - We will provide directions on how to register for the CSP within in this presentation
- Suppliers will have the ability to access their CSP content and manage settings for Savage companies as well as various other customer accounts

# Main Topics


CSP Registration
• CSP Invitation
• Creating Your CSP Account
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CSP Account Settings & Setup
• Account Settings
• Setup - Admin
• Business Profile
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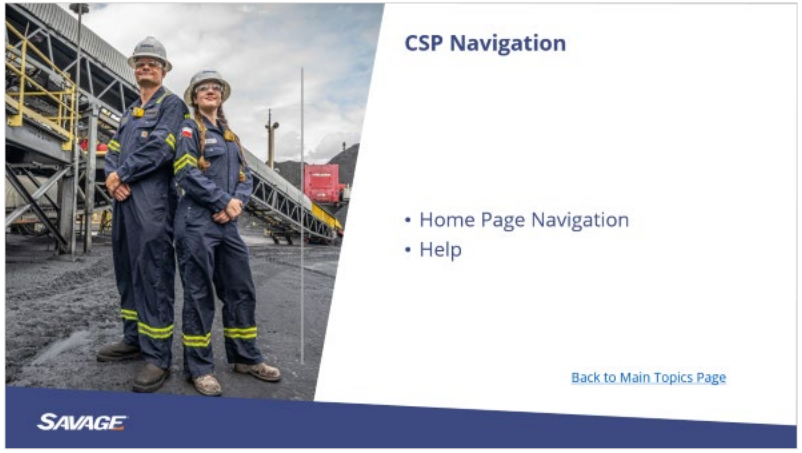
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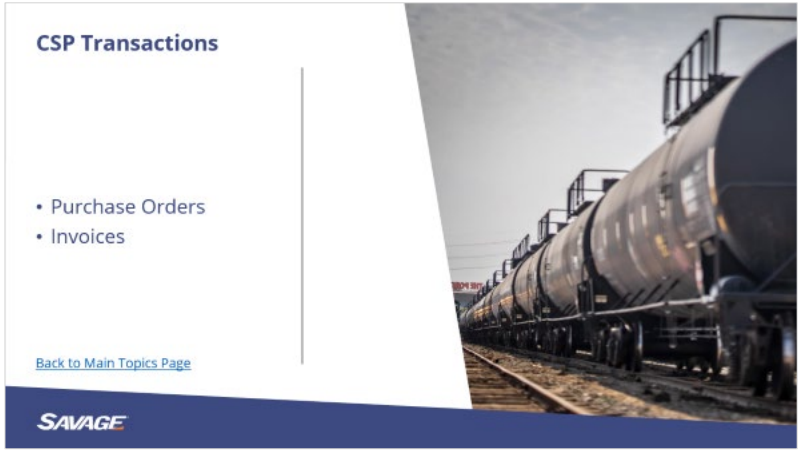
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# CSP Registration

- CSP Invitation
- Creating Your CSP Account

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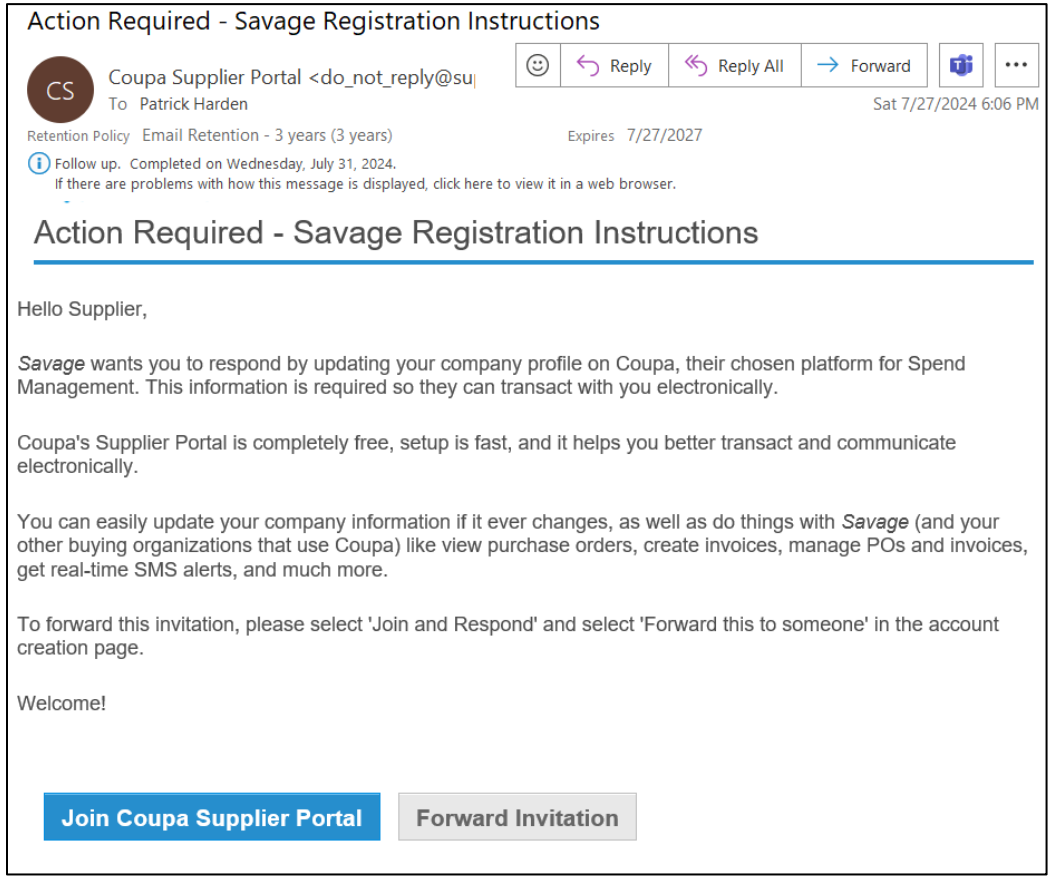
# CSP Invitation

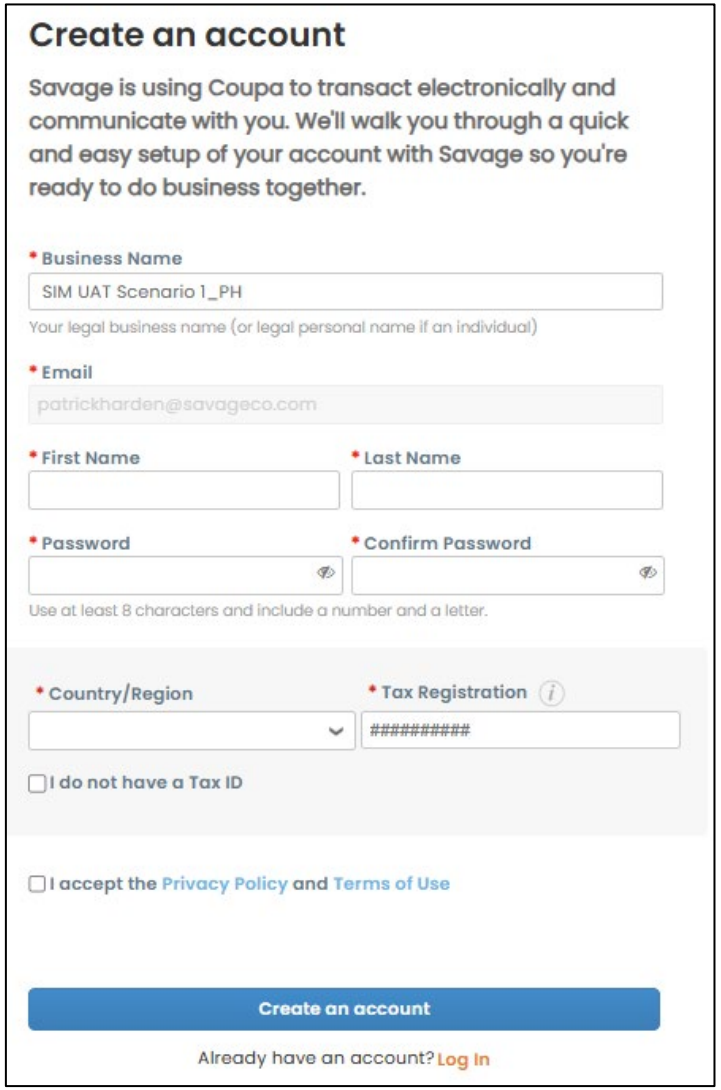
- You will receive an e-mail from Savage's Coupa system with a unique link to join the Coupa Supplier Portal
- The invitation can be forwarded to additional contacts if appropriate
- If you are the correct contact, please proceed with the Join Coupa button
- Save https://supplier.coupahost.com as a favorite link for quick access when you need to return to the site



# Creating Your CSP Account

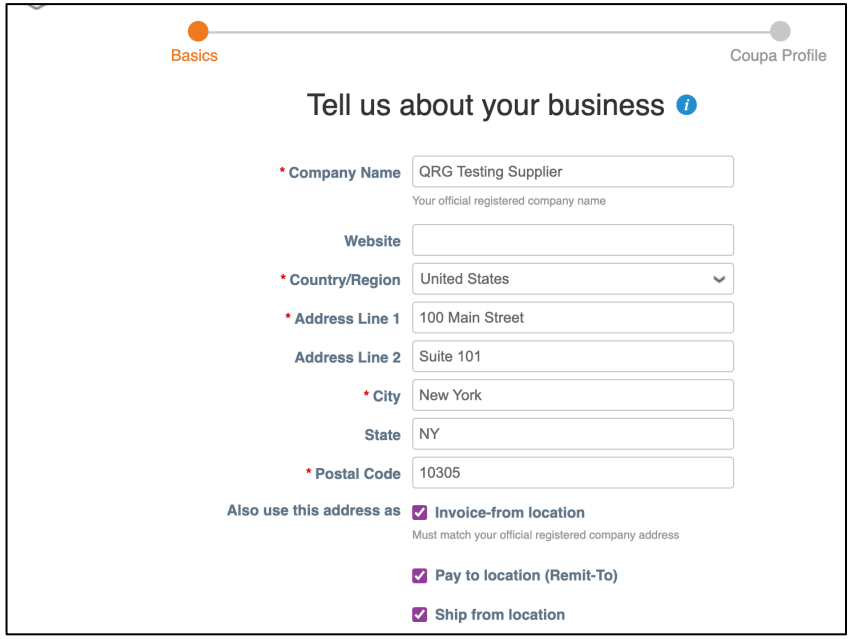
- Immediately after clicking the Join Coupa button, you will be redirected to the CSP and provided instructions on how to register
- Some of your information will be defaulted from the Supplier Record and Contact Information on file with Savage
- Once you choose a secure password, click the Create an Account button to finalize your profile

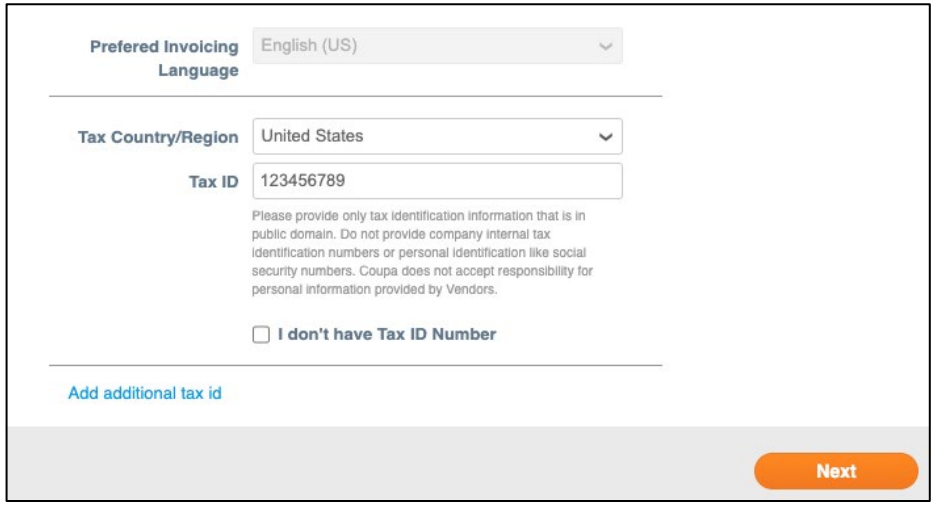
* If you already have a CSP account, you can click Log In instead and skip registering for a new account



# Creating Your CSP Account

- Next, you will enter information about your business to complete your CSP profile
  - Basic Business Information
  - Address / Remittance Information
  - Tax Information
- Click Next to finish setup

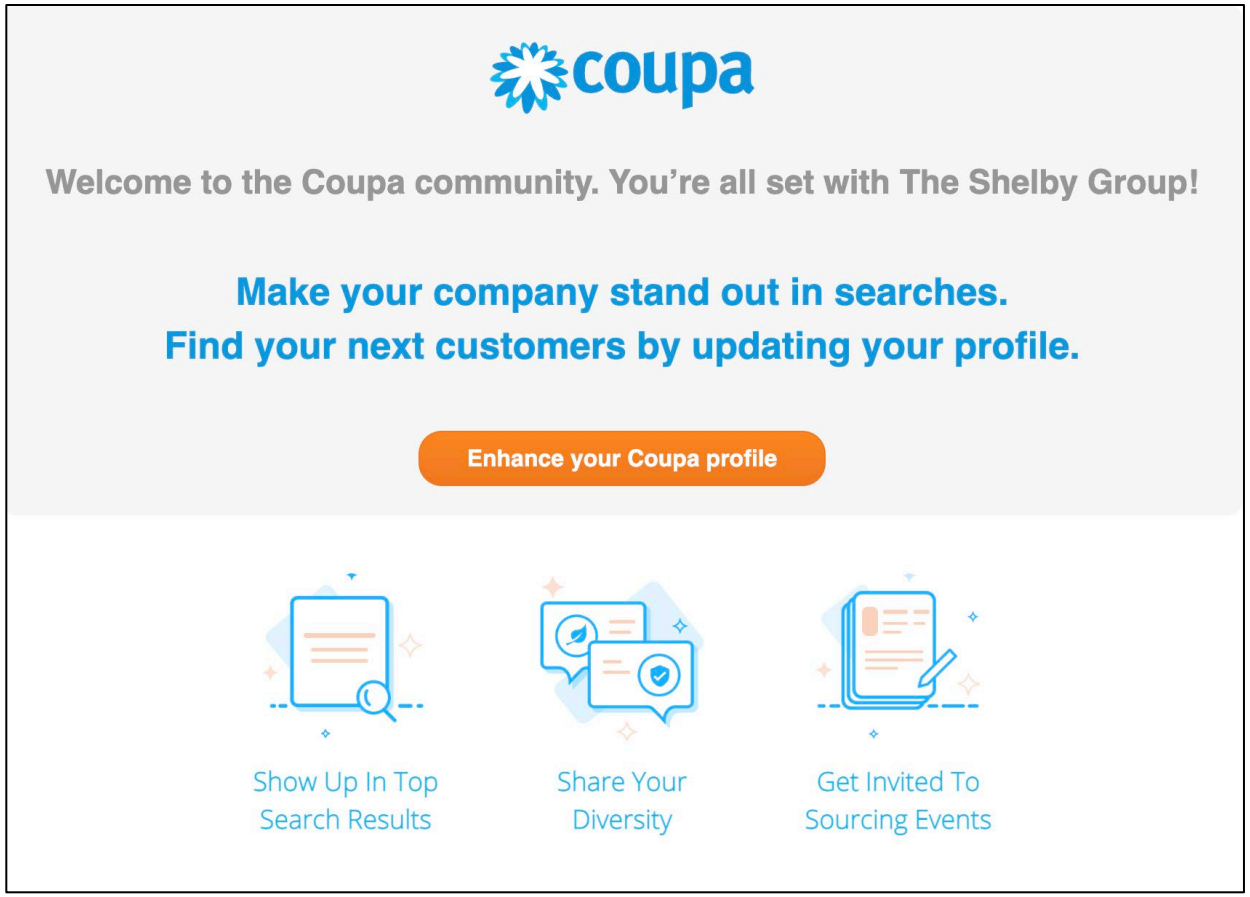


# Creating Your CSP Account

- After clicking Next, Coupa will invite you to enhance your CSP profile by adding more information about your company.

Profile enhancement steps are optional and can be completed at any time



# CSP Navigation

- Home Page Navigation
- Help

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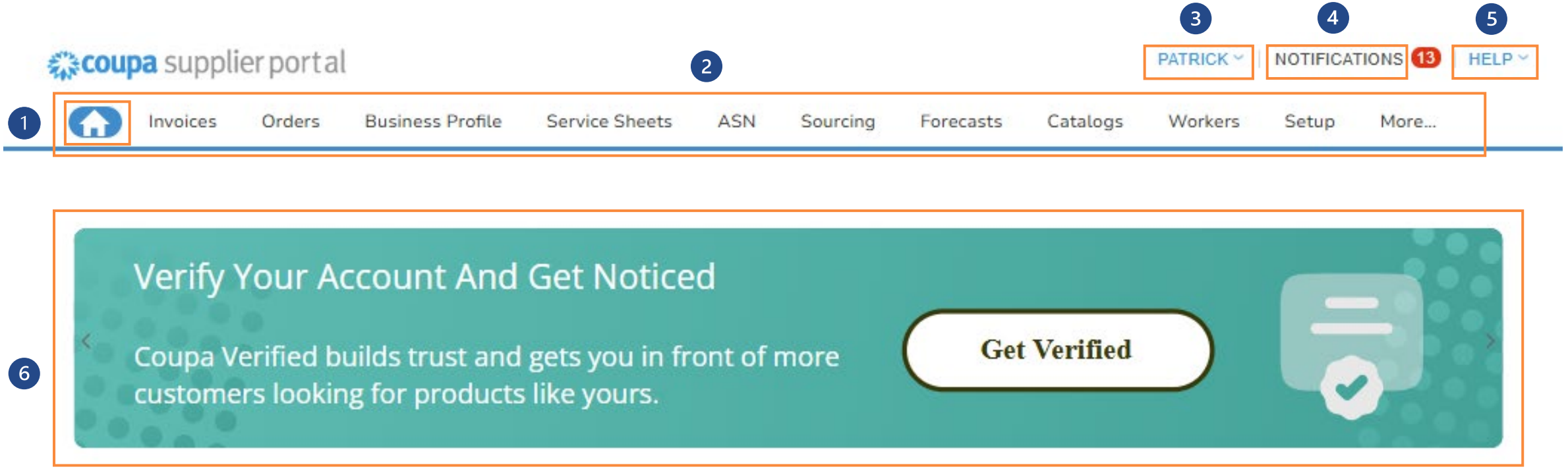
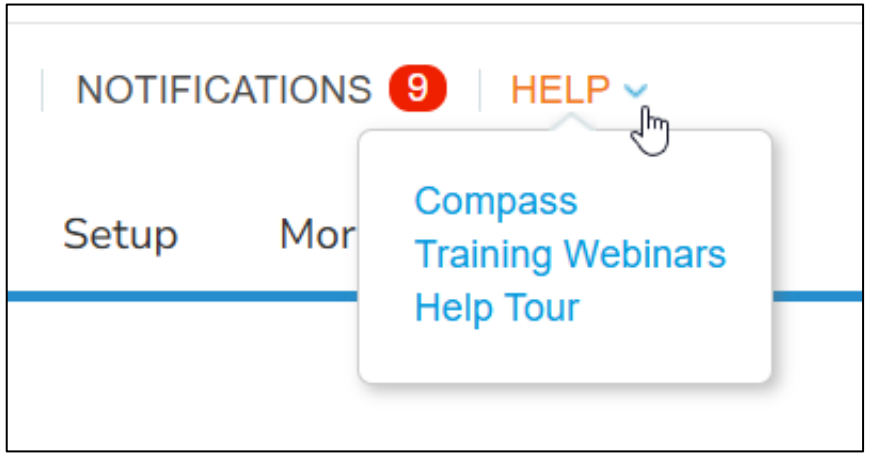
# Home Page Navigation

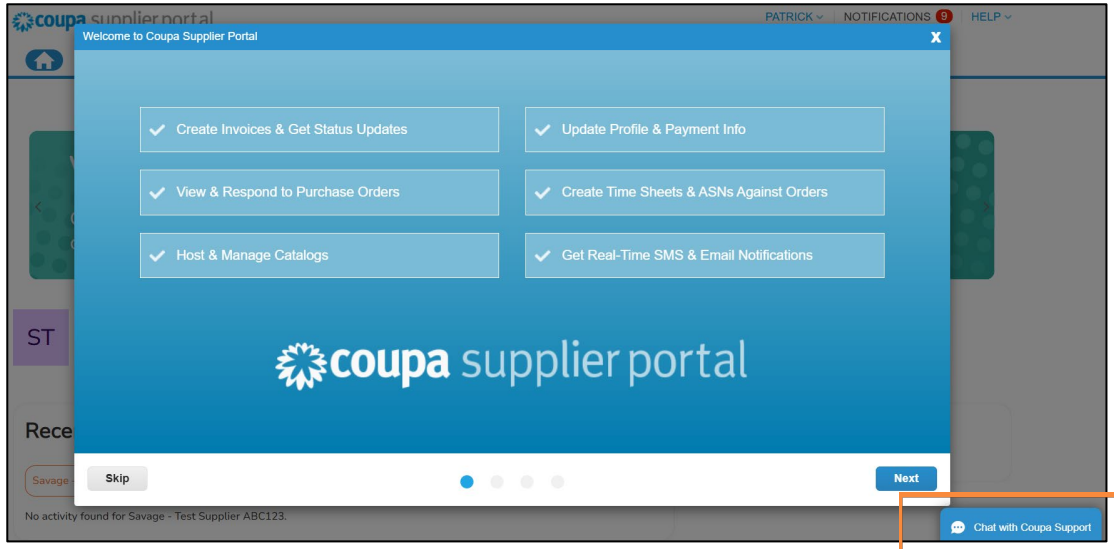



1. **Home Page Icon** – Takes user back to Home Page
2. **Navigation Bar –** Horizontal tool bar at the top of screen with links to each CSP tab
3. **Account Settings** – Access to user profile settings
4. **Notifications** – Link to notification alerts
5. **Help –** Welcome Tour and other resources
6. **Scrolling Banner** – Links to various Coupa offers such as Get Verified which is pictured above.

# Help

- You can view the Welcome Tour any time by clicking on the HELP drop-down in the top right corner and then Help Tour
- You can also view Compass articles and Training Webinars from the HELP menu
- For additional help, users can click on the Chat with Coupa Support button in the bottom right corner. Coupa Support will be able to assist you with any technical issues



# CSP Account Settings & Setup

- Account Settings
- Setup - Admin
- Business Profile

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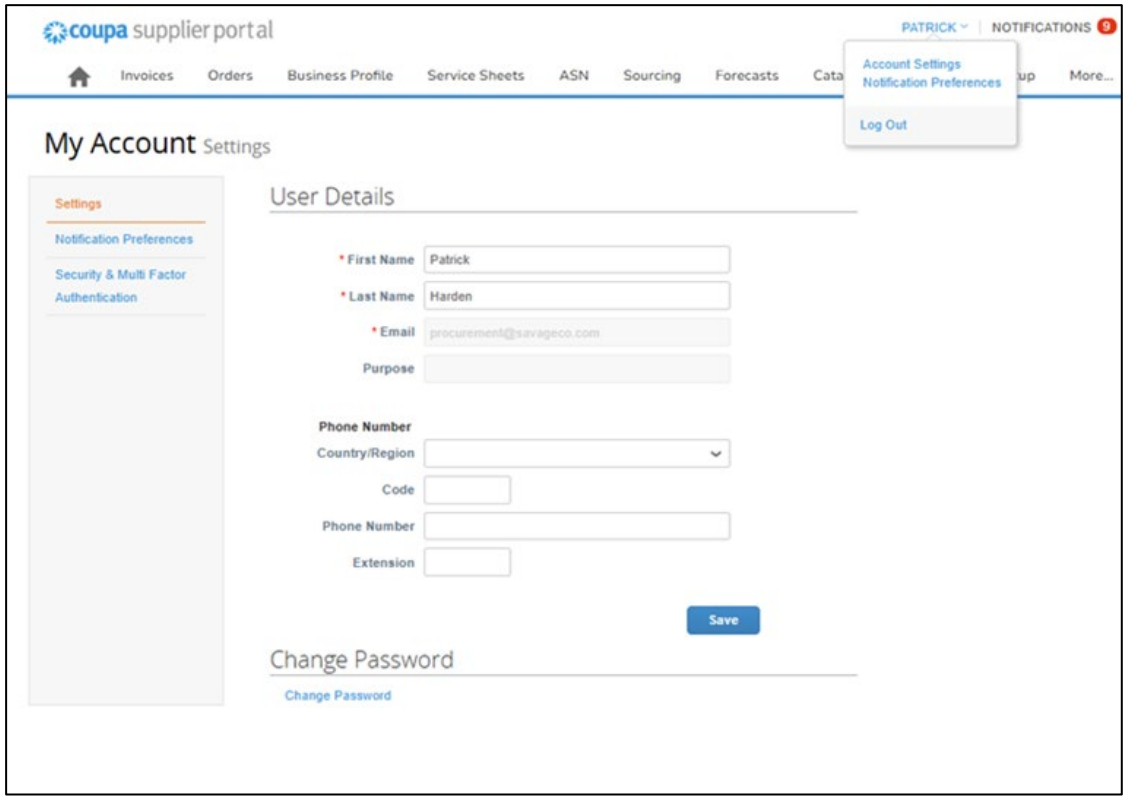
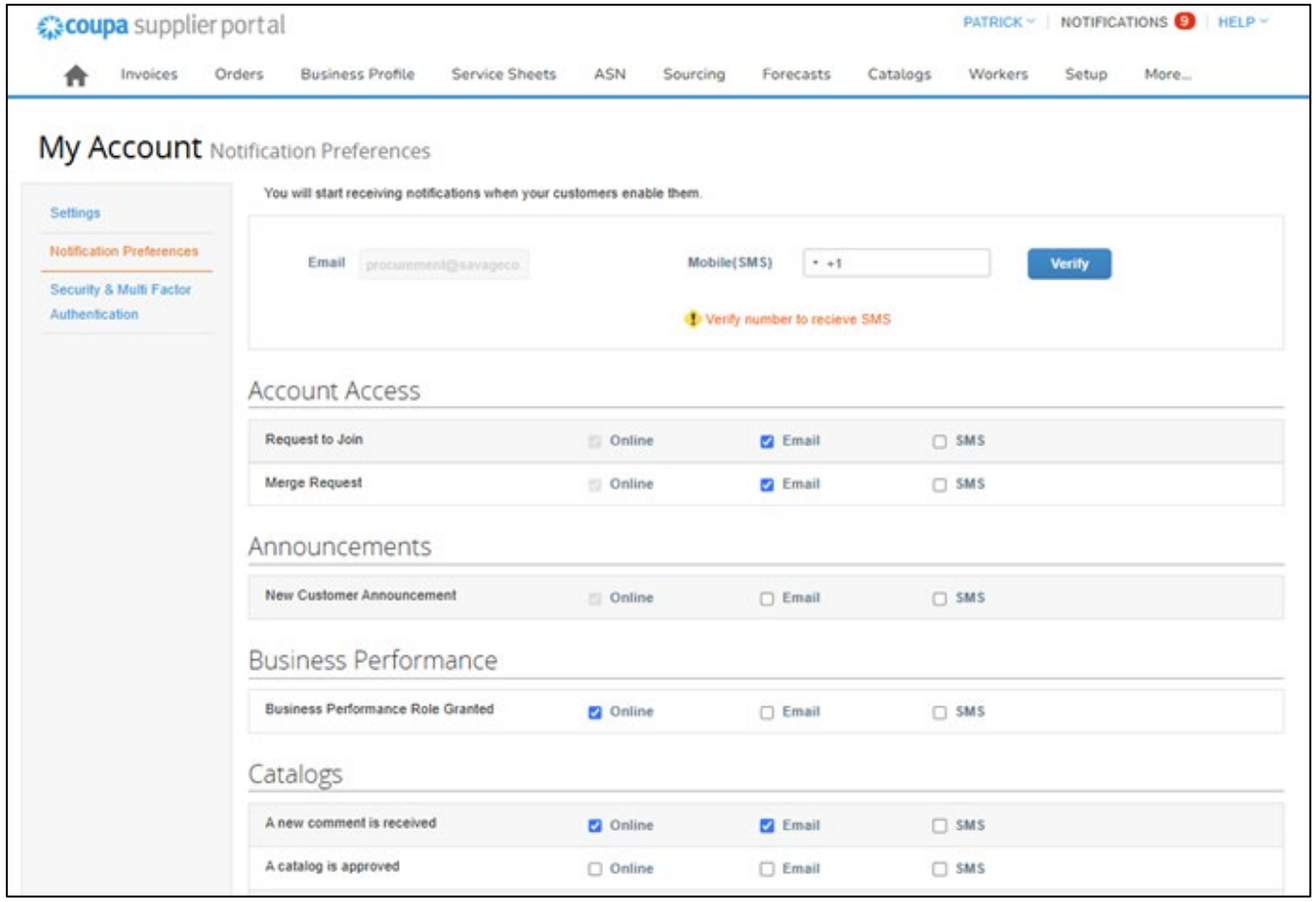
# Account Settings

- Hovering over your profile name in the top right corner will expose Account Settings
- On the My Account Settings page, you can make changes to your personal information
  - Name
  - Purpose
  - Phone Number
  - Password



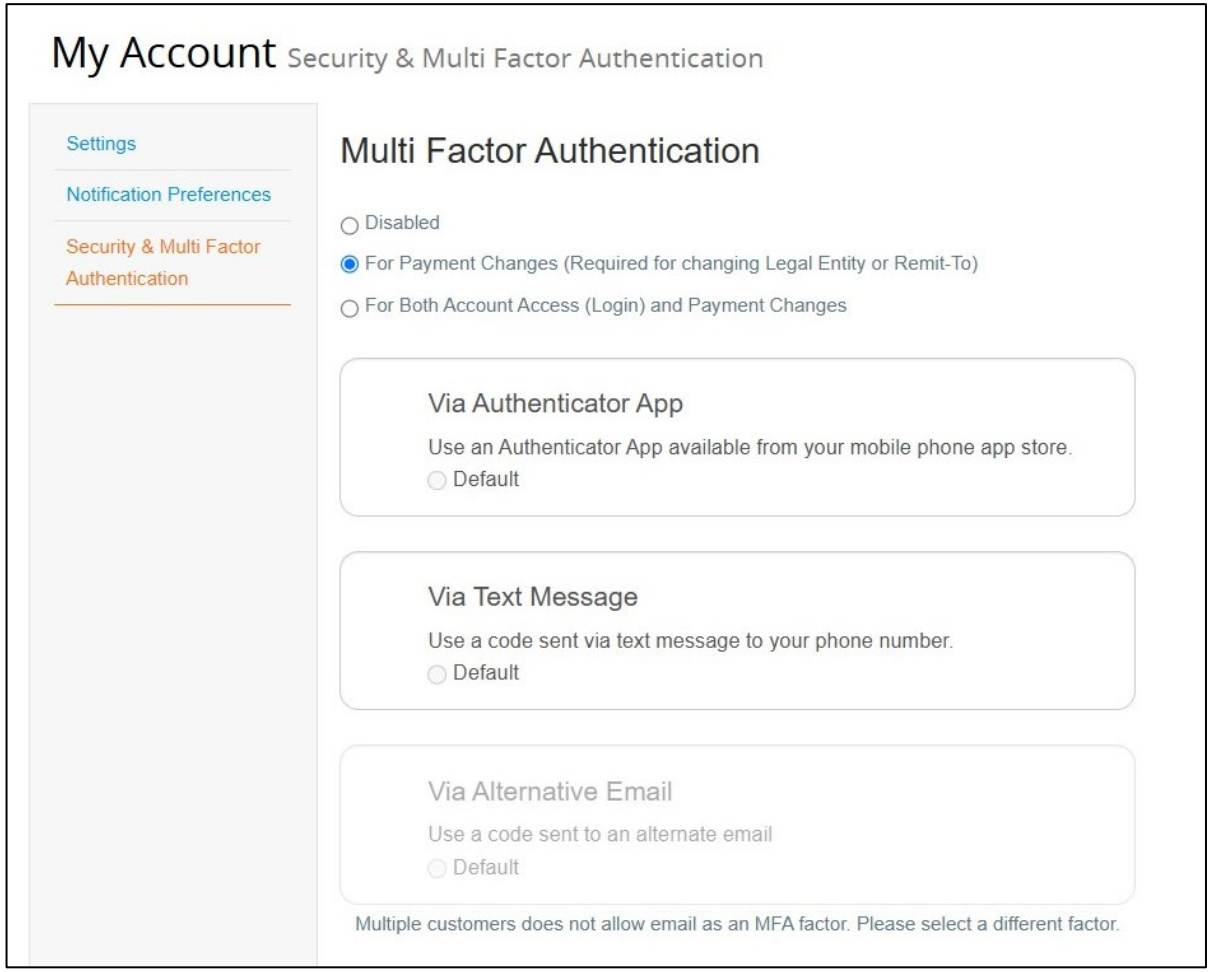
# Account – Notification Preferences

- Selecting Notification Preferences allows you to set the types of notifications you would like to receive and how they are sent



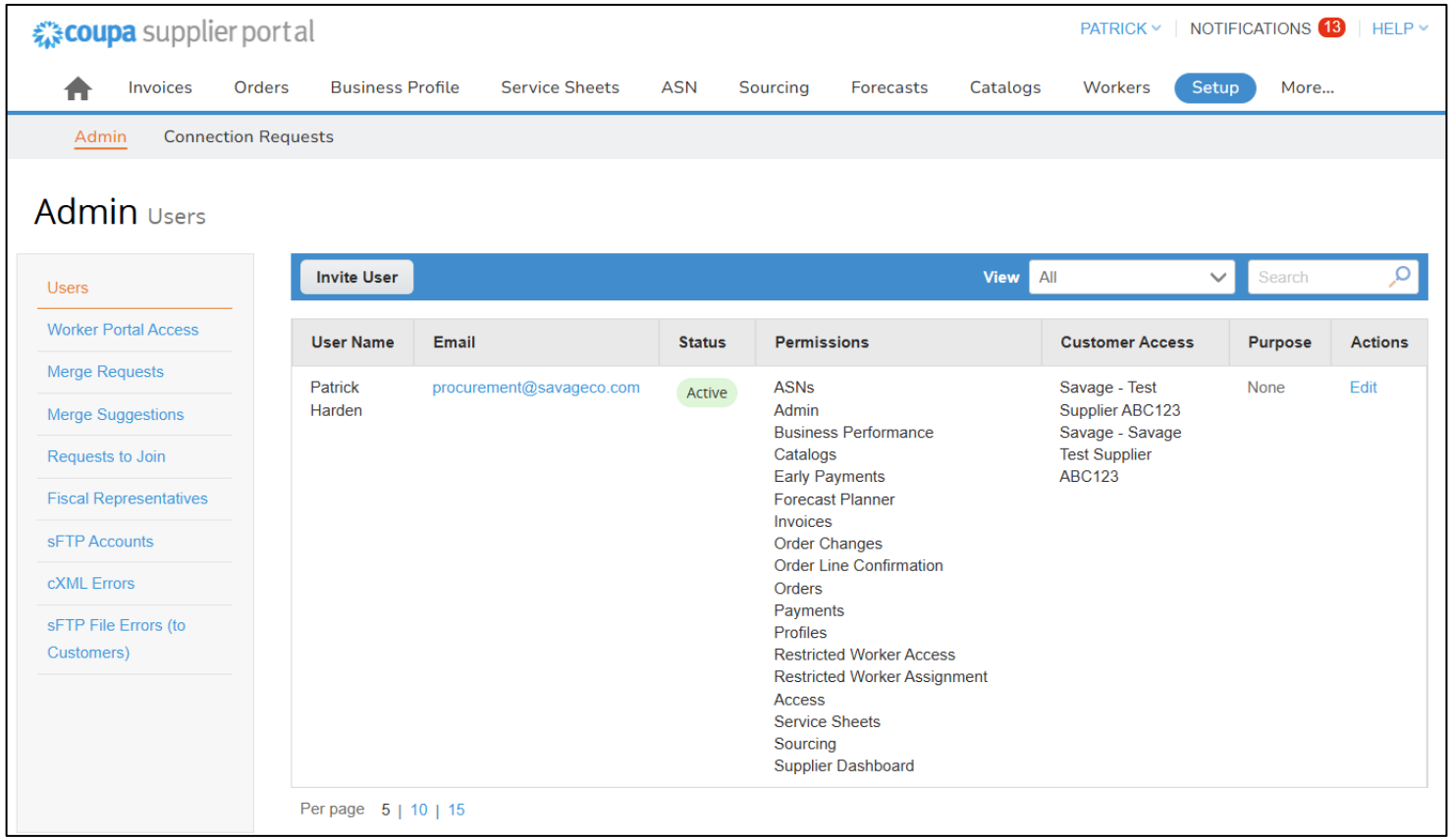
# Account – Security & Multi Factor Authentication

- The Security & Multi Factor Authentication page is where you can set the Authentication Method used for accessing your CSP account



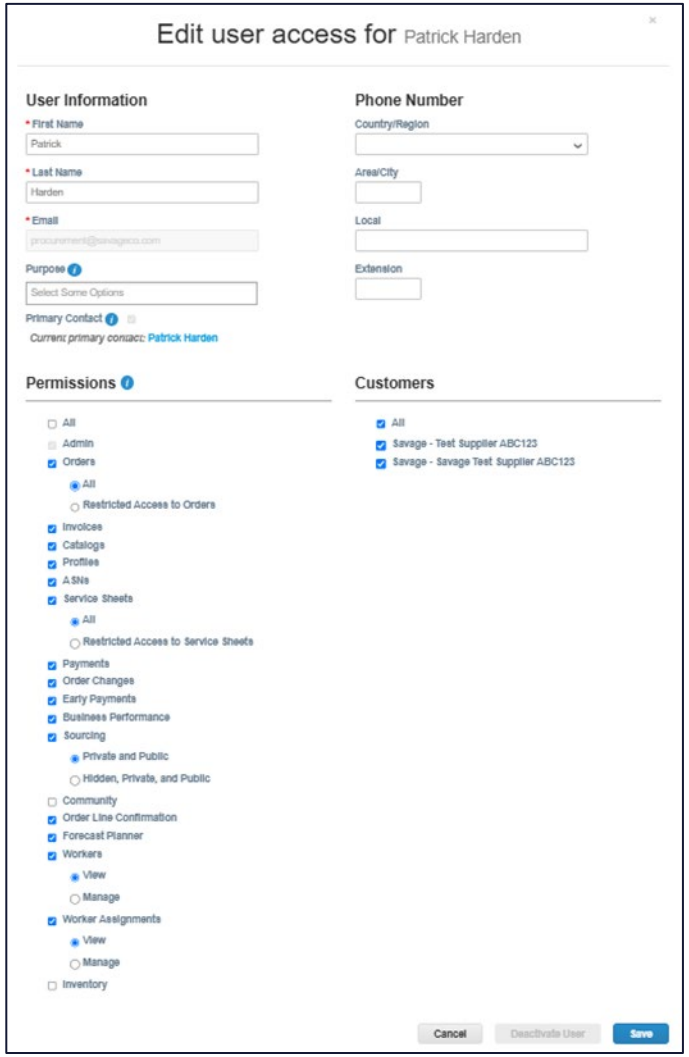
# Setup - Admin

- Admin Users can manage account-wide settings by navigating to the Setup page in the navigation bar. Admins can control user access, invite new users and manage Merge Requests and Merge Suggestions.



# Setup - Admin – Users

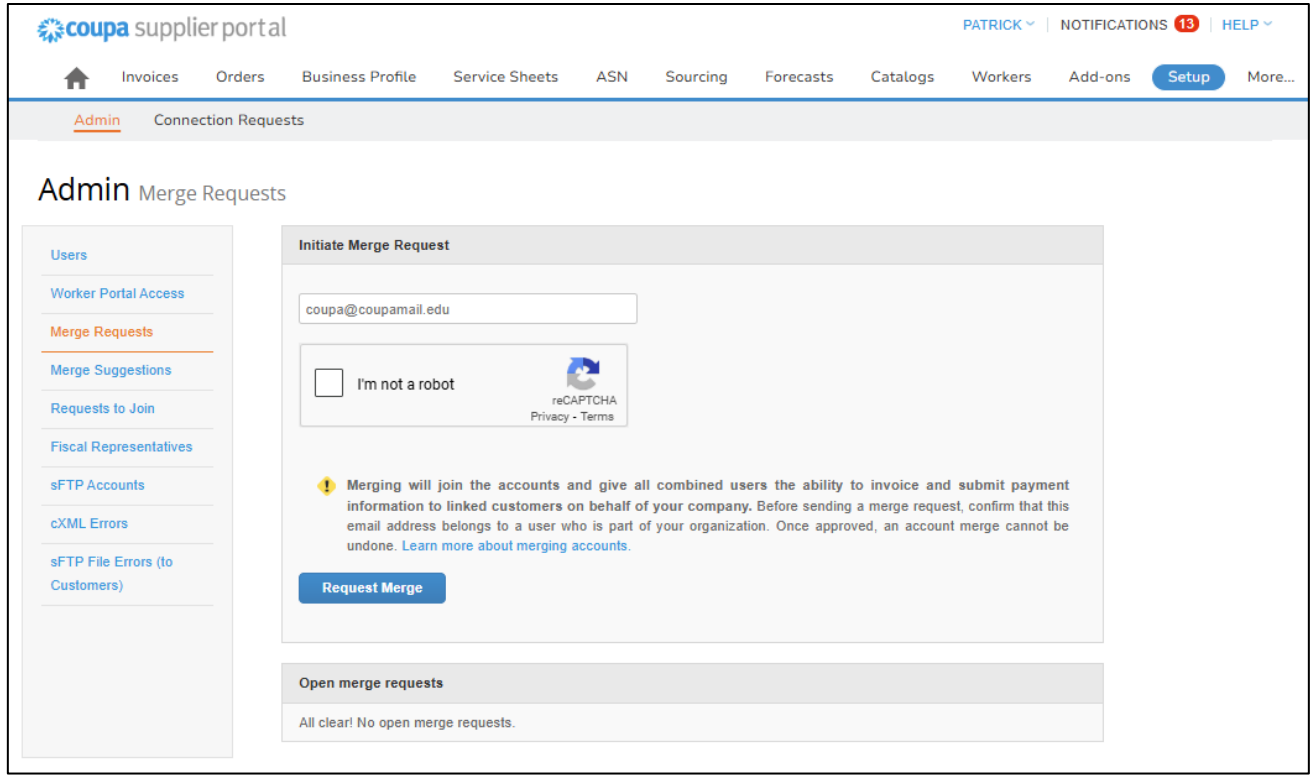
- Admins can edit the permissions of existing CSP users
- Adjusting a user's permissions will change the user's view of the home page as it controls which tabs and functions users can access
- Admins can also select which customers your users have access to view



# Setup - Admin – Merge Requests

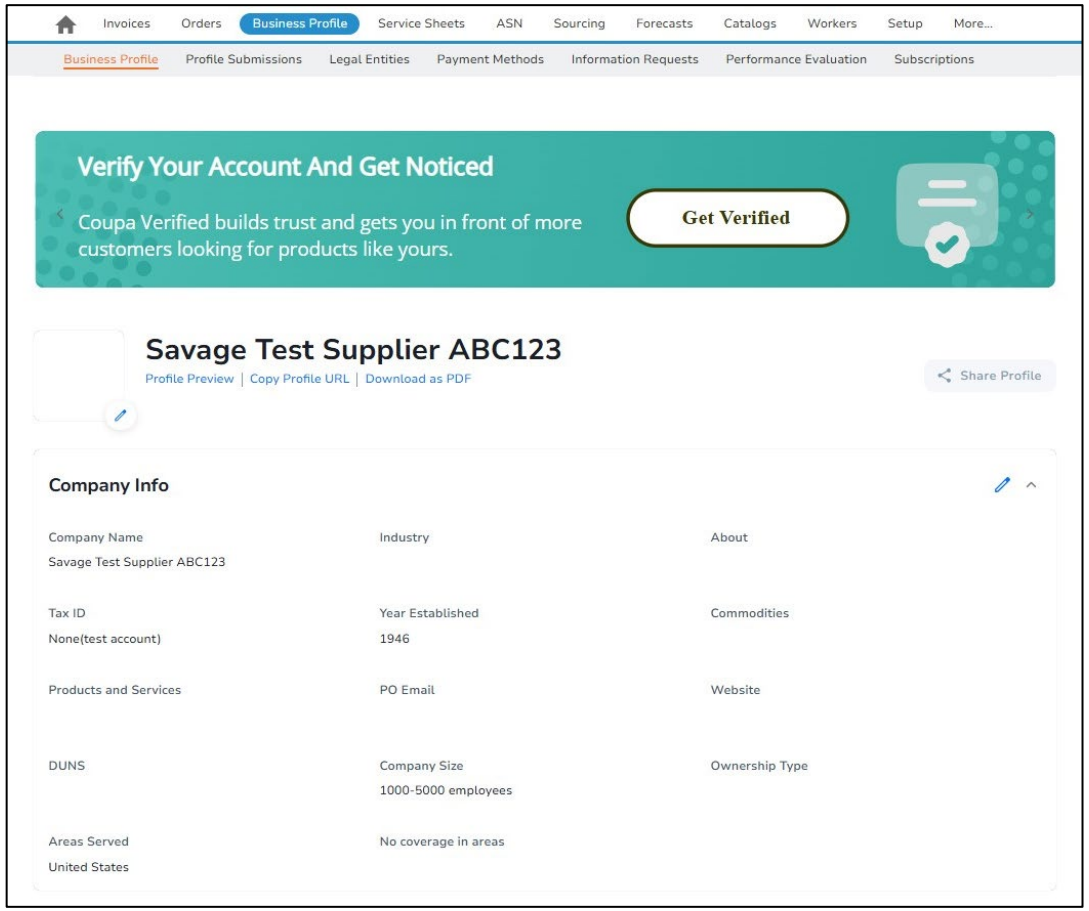
- Your company may have more than one CSP account. This can happen when several users from the same company register or are invited to the CSP through different email addresses.
- Admins have access to merge these accounts as needed.

Visit the Coupa Compass portal for more information on Merge



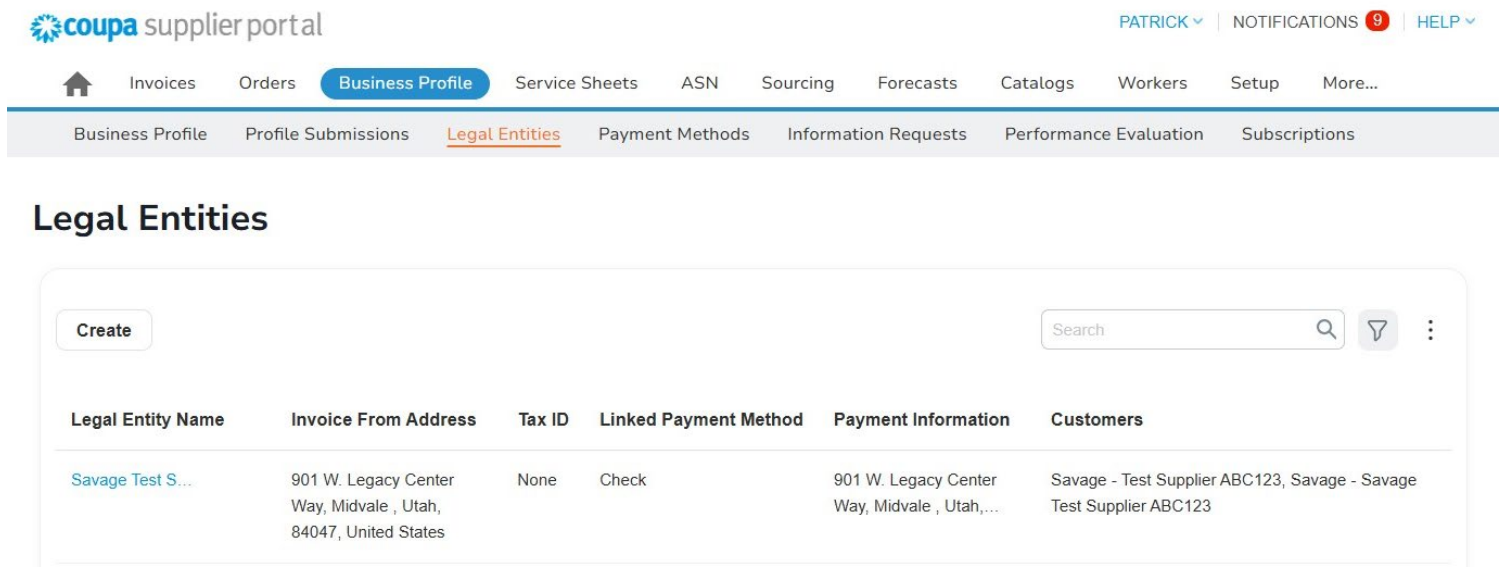
# Business Profile

- The Business Profile tab allows admins to manage the Company Info that was added during setup



# Business Profile – Legal Entities

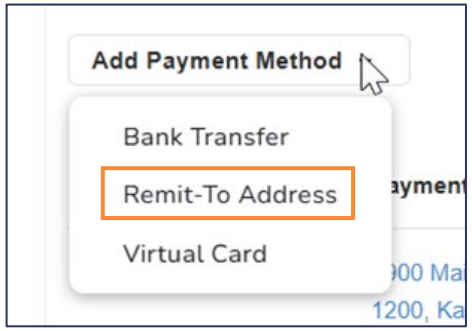
- By clicking on Legal Entities under the Business Profile tab, admins can add or manage their company Legal Entity information
- Legal Entities are comprised of
  - Legal Name of your company(s)
  - Tax ID
  - Address(es)
    - Invoice From
    - Ship From
    - Payment Method (Remit-to)
  - Customers (linked for PO & Invoice)



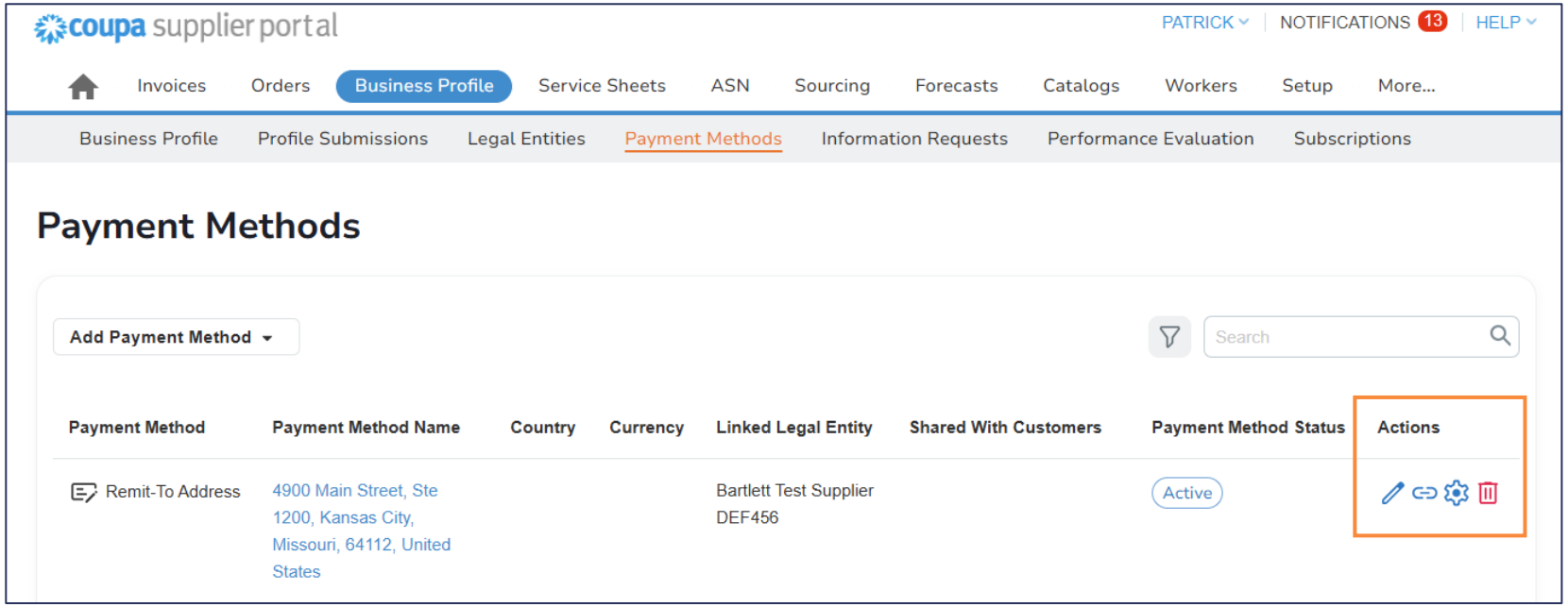

Invoice From, Ship From and Remit-to Codes are important for cXML connections

# Business Profile – Payment Methods

- Admins can add or manage payments methods from the Business Profile tab.
- Although Savage does not use Coupa Pay (we pay via ACH), we need suppliers to create a payment method (Remit-to Address) in Coupa and add Savage as a Shared With Customer to enable invoicing.




If Savage is greyed out in the Customer list on the invoicing tab, it is likely due to not being a Linked Customer to a Payment Method



# CSP Transactions

- Purchase Orders
- Invoices

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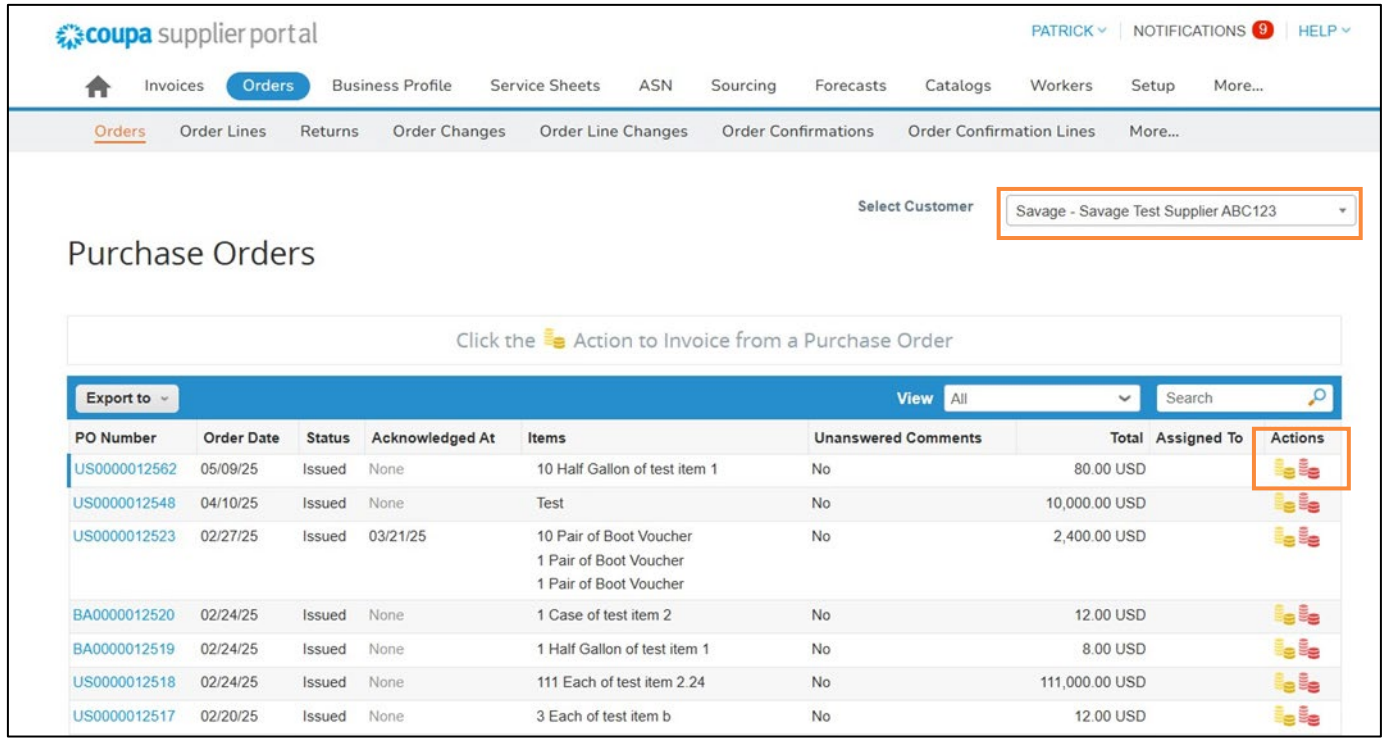
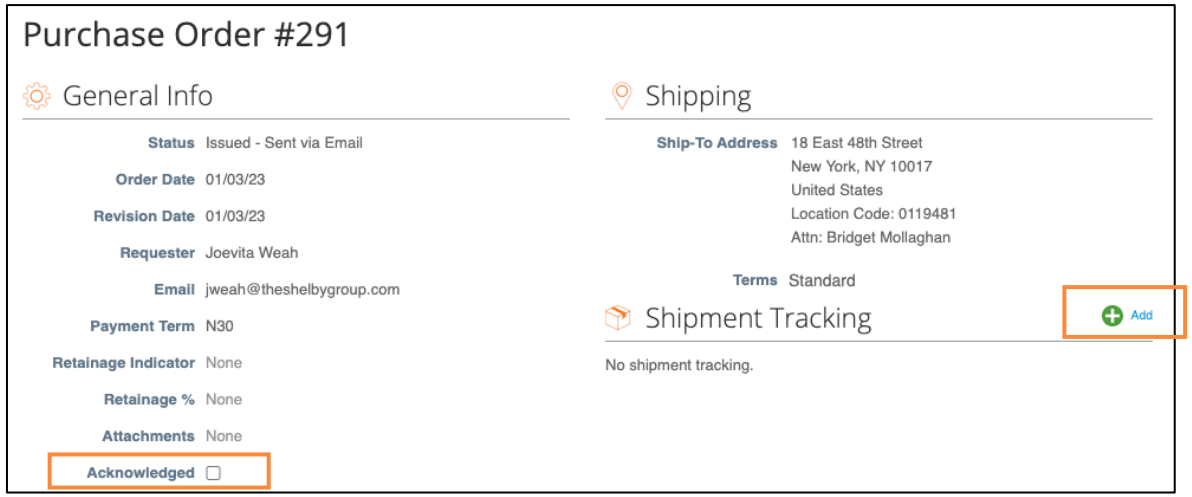
# Purchase Orders

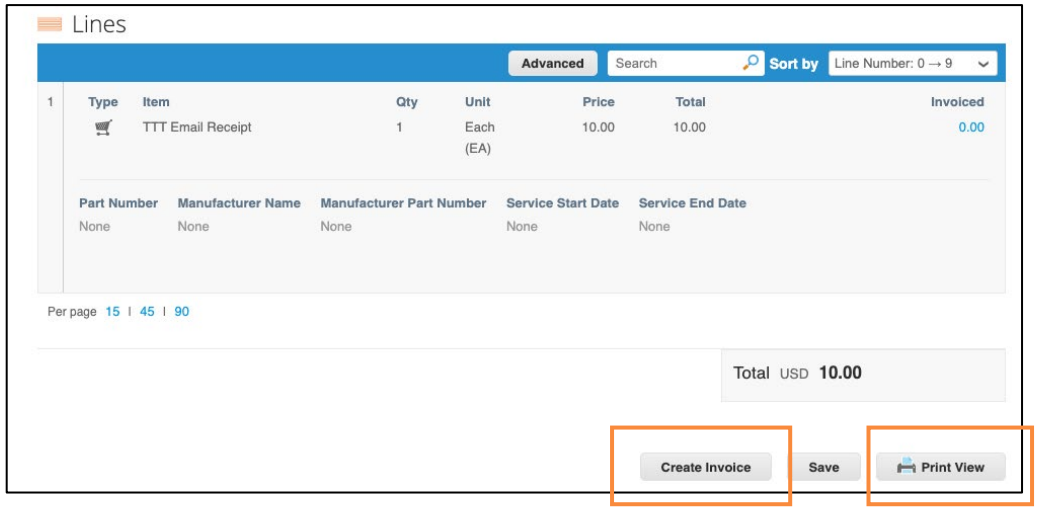
- From the Orders tab, CSP users can monitor and interact with POs from their assigned customers
- The page can be filtered according to the appropriate customer using the Select Customer drop-down list in the top right corner
- Icons under the Action column
  - Gold coins flip PO into an invoice
  - Red coins create a credit note



# Purchase Orders

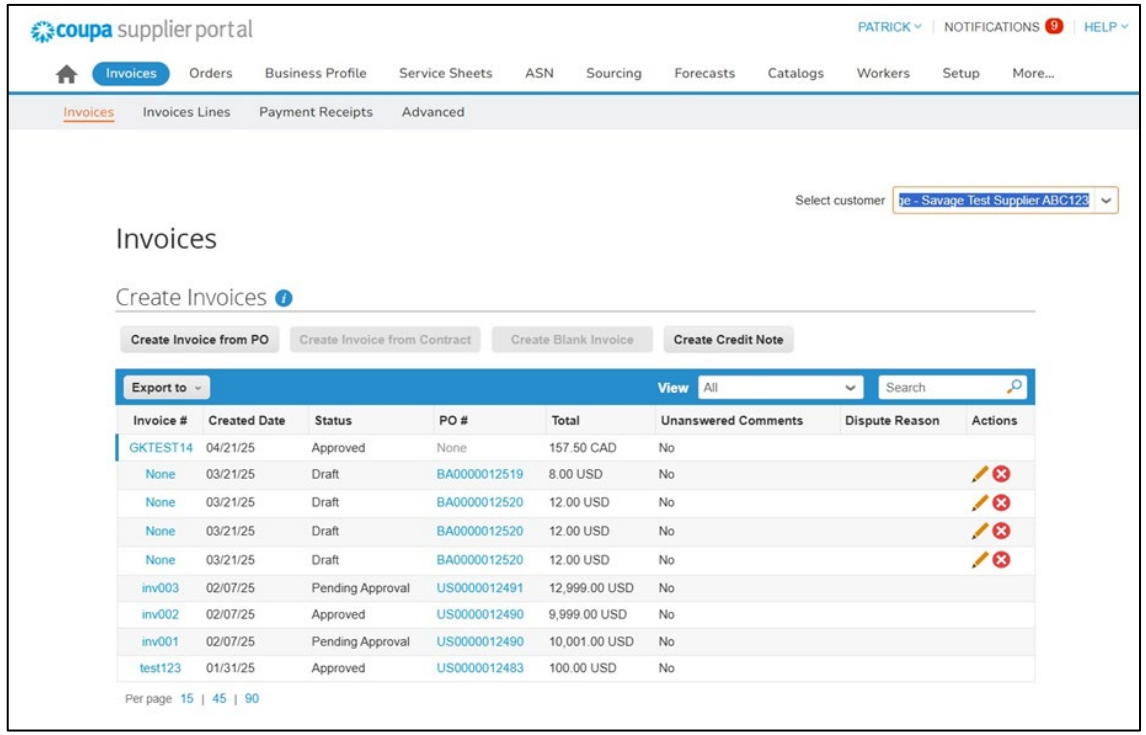
- Under the PO Number column click on the number to open and view the PO and perform the following actions:
  - Acknowledge PO
  - Add Shipment Tracking
  - Print View
  - Create Invoice



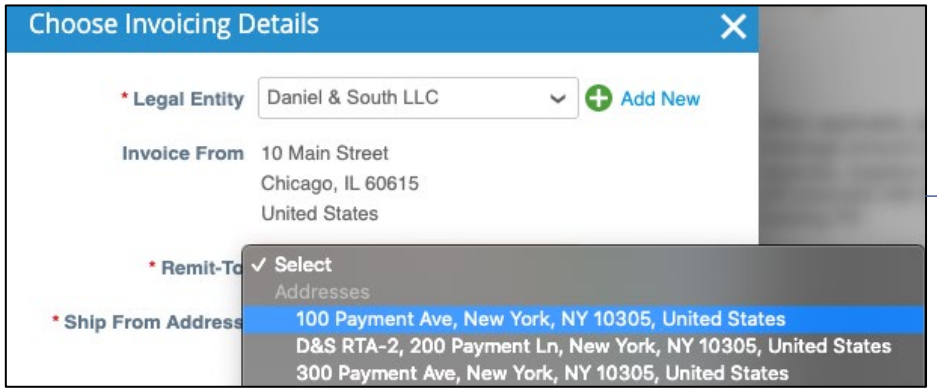
# Invoices

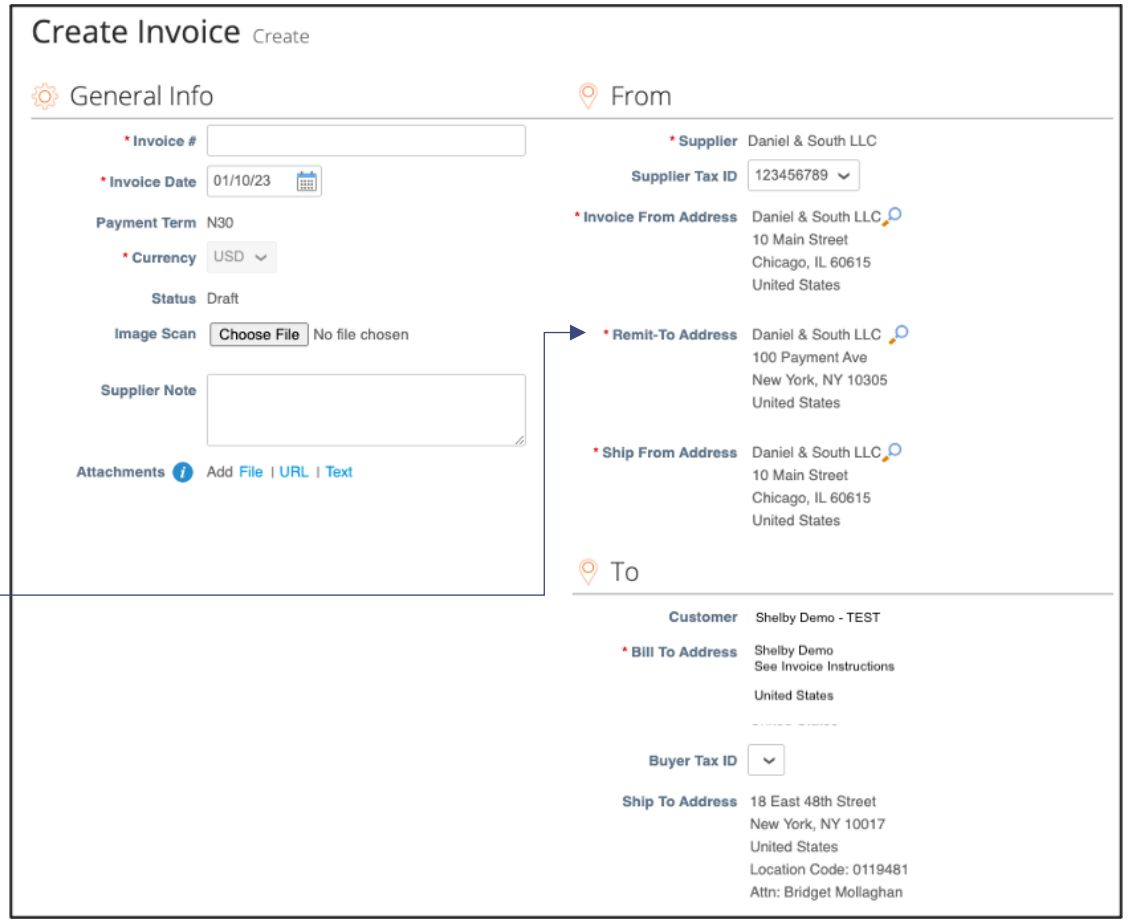
- Select the Invoices tab to monitor existing Coupa invoices or create new ones
- Invoices can be created via:
  - PO Flip (gold coins on PO tab)
  - Create Invoice from PO (button on this tab)
- Suppliers can use the View dropdown or search bar to filter/search for desired documents
- Blue hyperlinks allow you to open an invoice or the associated PO by clicking the document #



# Invoices - Create Invoice Header Fields

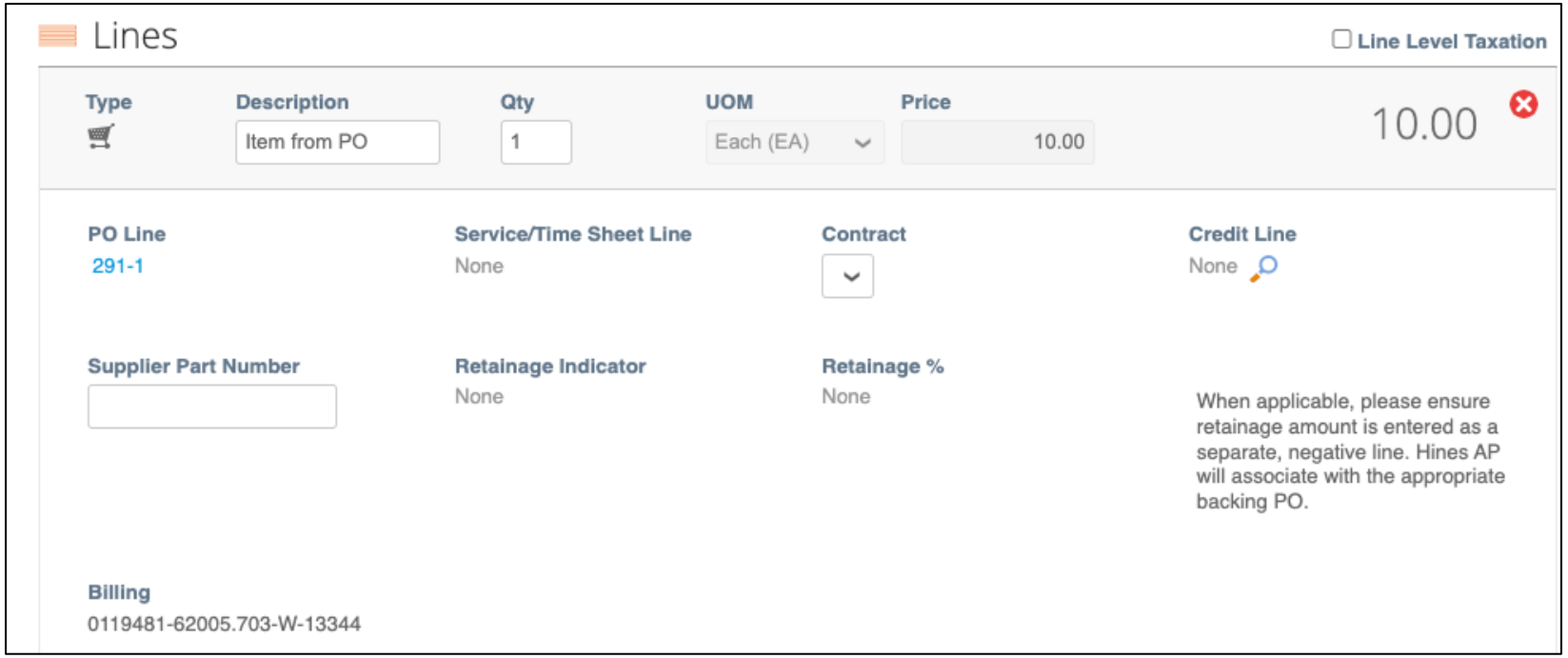
- Populate all the required header fields
- Specify a previously created Payment Method / Remit-to Address for this particular transaction



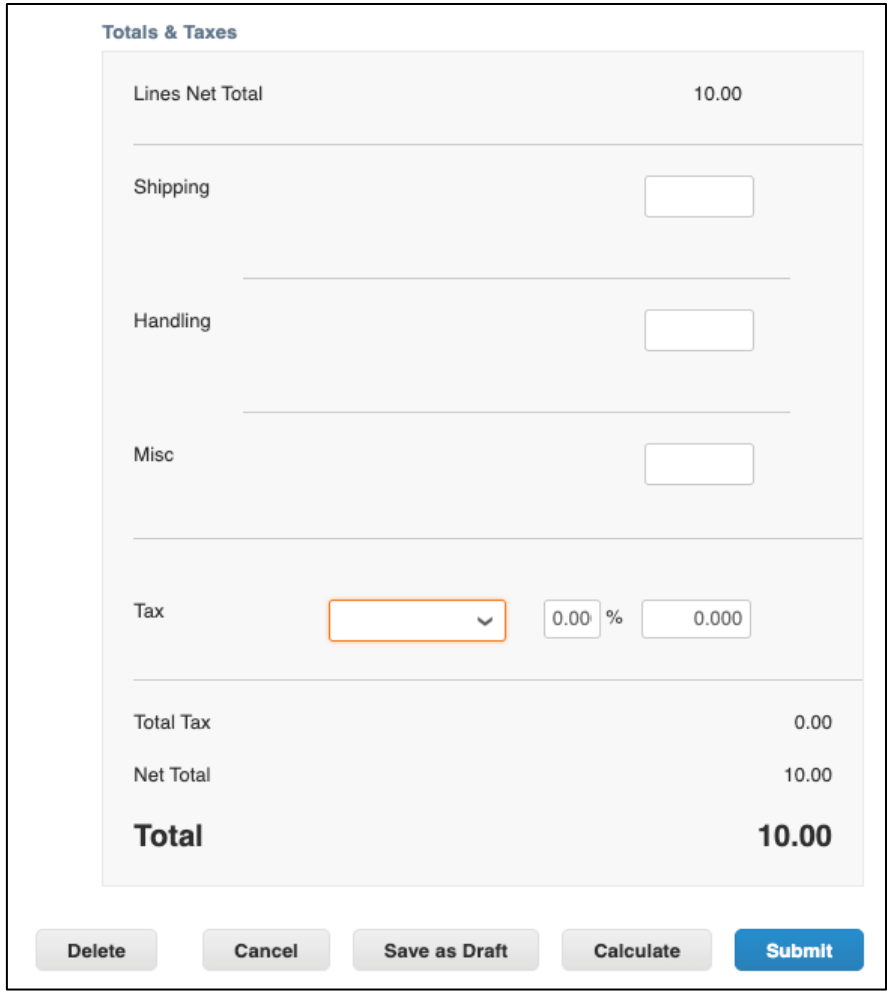
# Invoices - Create Invoice – Lines Fields

- Populate all the required line fields (most will default from the PO)



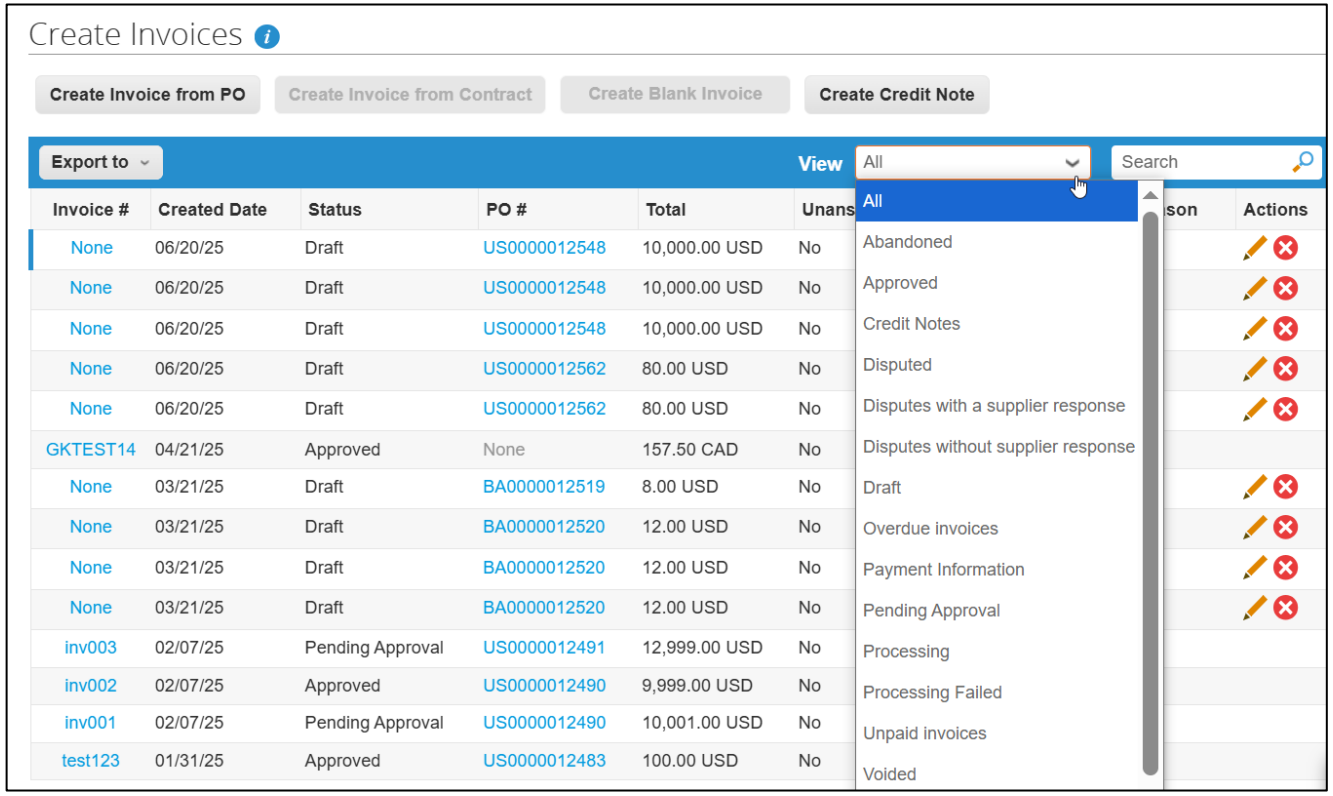
# Invoices - Create Invoices Summary Fields

- Suppliers can add Summary Level charges (such as shipping and tax) as applicable
- Calculate the invoice total and Submit the invoice to the customer
- Savage will then receive the invoice in our Coupa instance and will process it for approval and payment



# Invoices – Status & Views

- Key Invoice Statuses
  - Approved – Savage will pay the invoice according to payment terms
  - Voided – Savage deleted the invoice
  - Disputed – Savage rejected the invoice and likely added a comment as to why
- Views can be created and used to filter results to a given status
- Savage does not pay through the CSP so invoices will not show Paid only Approved



# Thank you for your participation!

- Note: if you have any questions or need additional assistance, please contact Savage
  - Procurement: Procurement@savageco.com
  - Supplier Success Team: Supplier@savageco.com

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SAVAGE®

We move and manage what matters so our Customers and Partners can **Feed the World, Power Our Lives,** and **Sustain the Planet.**

FEED THE WORLD

POWER OUR LIVES

SUSTAIN THE PLANET