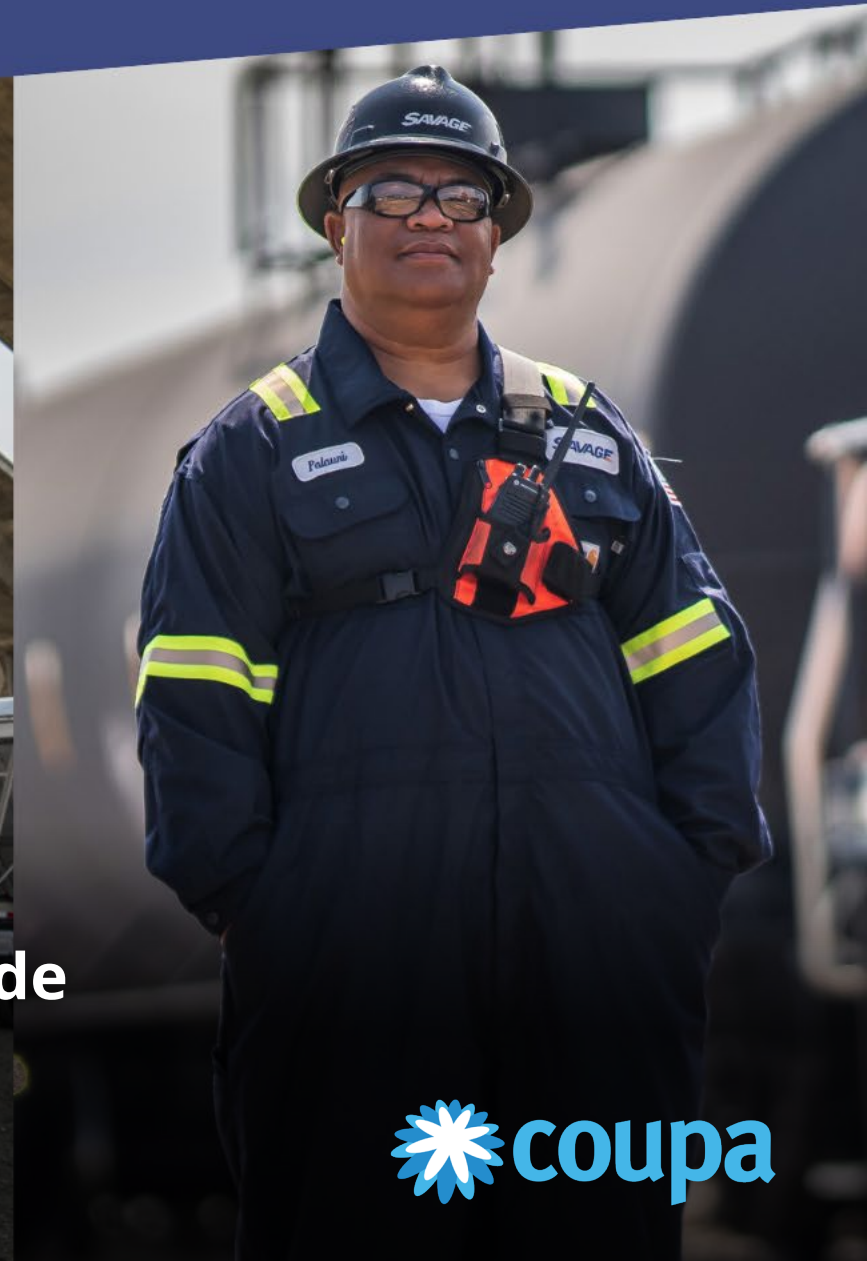
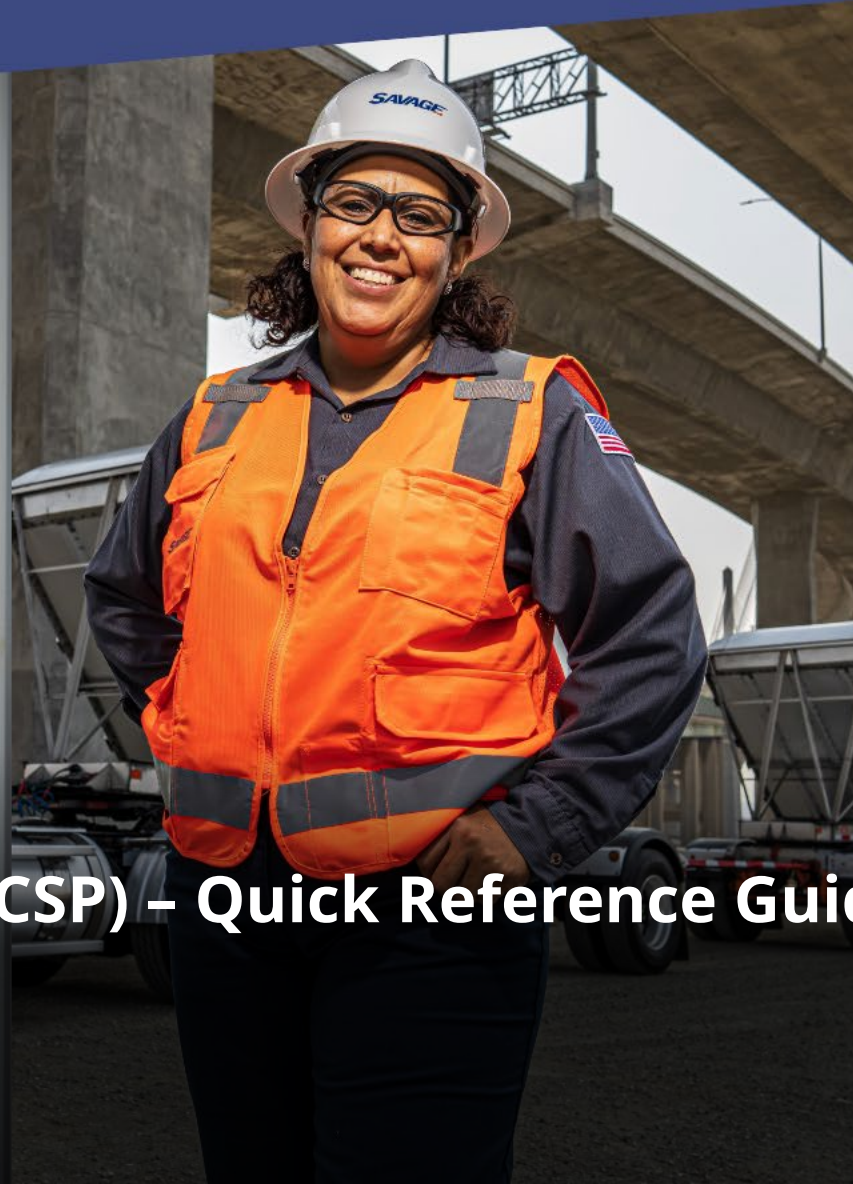


SAVAGE®



Coupa Supplier Portal (CSP) – Quick Reference Guide

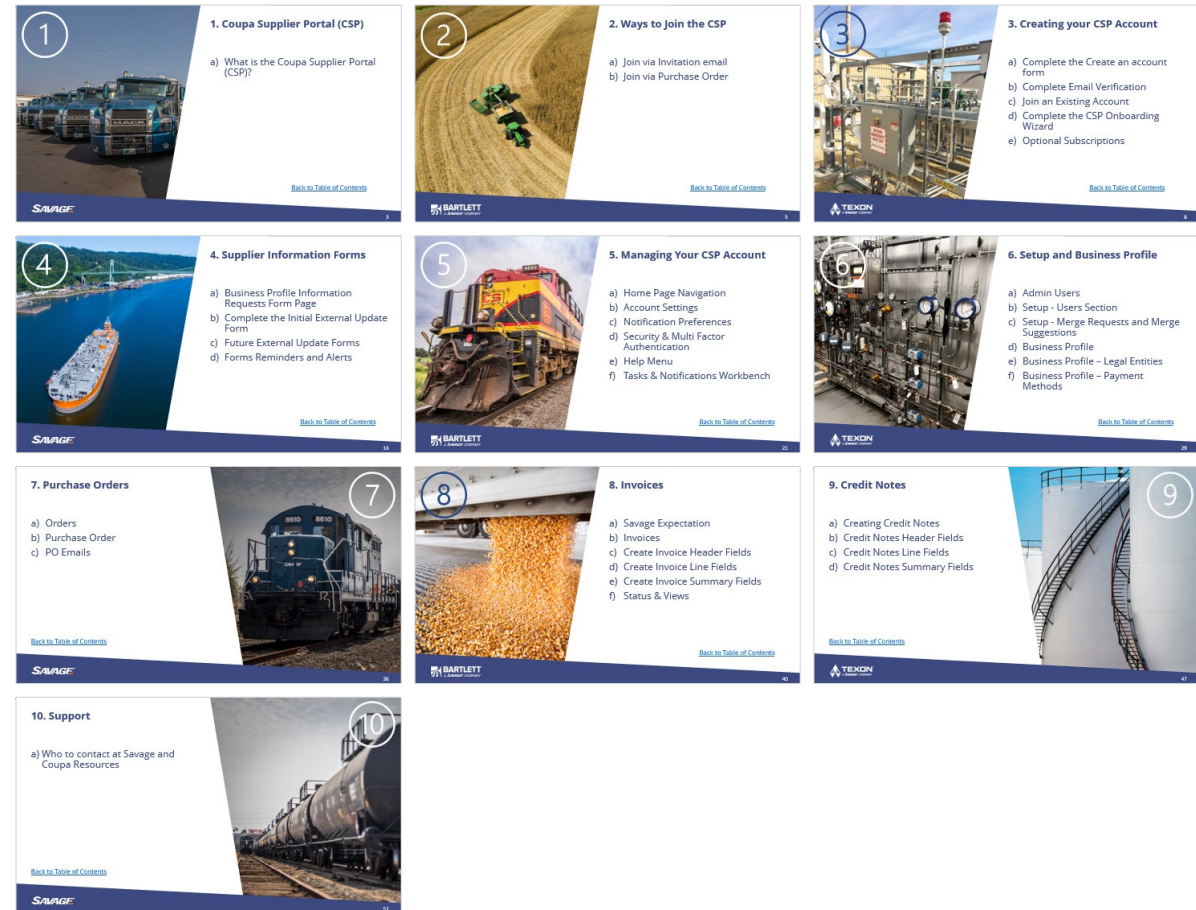
June 2026



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1. [Coupa Supplier Portal \(CSP\)](#)
2. [Ways to Join the CSP](#)
3. [Creating Your CSP Account](#)
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5. [Managing Your CSP Account](#)
6. [Setup and Business Profile](#)
7. [Purchase Orders](#)
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1



1. Coupa Supplier Portal (CSP)

a) What is the Coupa Supplier Portal (CSP)?

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1a. Coupa Supplier Portal (CSP)

What is the Coupa Supplier Portal (CSP)?

- What is Coupa?
 - Coupa is the Procure to Pay tool that Savage uses to create purchase orders and process invoices
 - [Savage-What-Is-Coupa.pdf](#)
- What is the Coupa Supplier Portal?
 - The Coupa Supplier Portal (CSP) is a free instance of Coupa for suppliers to easily transact with Savage and other customers who use Coupa.
- Why should your company use the CSP?
 - Signing up to the CSP will allow our suppliers to:
 - Receive and manage purchase orders
 - Submit invoices electronically and track their status
 - Share company addresses and payment info

2

2. Ways to Join the CSP

- a) Join via Invitation email
- b) Join via Purchase Order

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2a. Ways to Join the CSP

Join via Invitation email

- You will receive an e-mail from Savage via Coupa (do_not_reply@supplier.coupahost.com), to join the Coupa Supplier Portal
 - If you are the correct contact, please click the Join Coupa button
 - If you are not the best contact, please forward the invite to a better contact within your company so they can join
 - Please ensure you act on the invitation within 48 hours of receipt. If the invitation expires, please contact Savage for further support.
- Forwarded Invitations have the same functionality and buttons to join or forward as the original invite



What if I didn't receive the email invitation to join Coupa?

Check your spam/junk email folder. Emails sometimes get flagged as spam. If you still cannot find the invite, you can [register](#) instead. However, if you register, make sure to use the same email address to register that your customer used to invite you.

Action Required - Savage Registration Instructions

 Coupa Supplier Portal <do_not_reply@su...>
To: Patrick Harden

  Reply  Reply All  Forward  

Sat 7/27/2024 6:06 PM

Retention Policy Email Retention - 3 years (3 years) Expires 7/27/2027

 Follow up. Completed on Wednesday, July 31, 2024.
If there are problems with how this message is displayed, click here to view it in a web browser.

Action Required - Savage Registration Instructions

Hello Supplier,

Savage wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

You can easily update your company information if it ever changes, as well as do things with Savage (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.

Welcome!

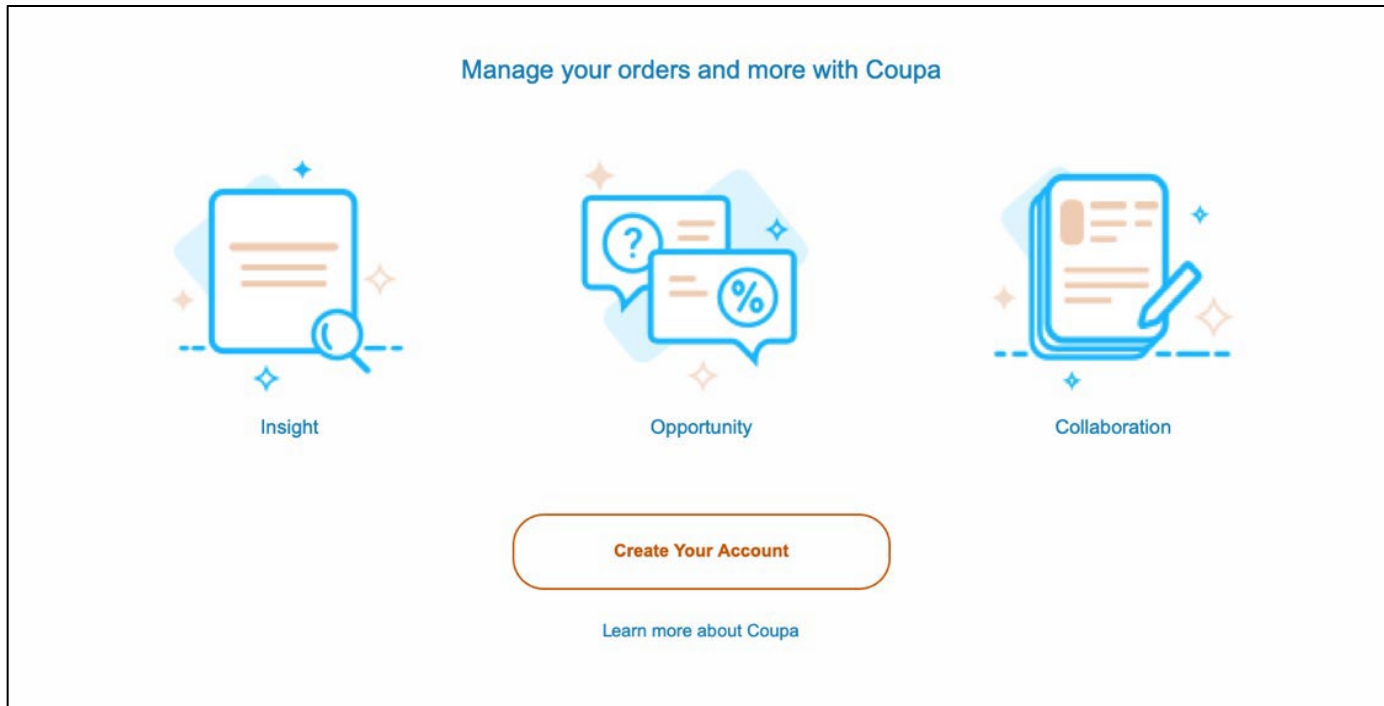
Join Coupa Supplier Portal

Forward Invitation

2b. Ways to Join the CSP

Join via Purchase Order

- You can also join the CSP within a purchase order sent via Supplier Actionable Notifications (SAN). At the bottom of these emailed POs, there is a button to Create Your Account.
- The Create Your Account button lets you create a Coupa Supplier Portal (CSP) account directly from the PO by taking you to the registration/login page.



3



3. Creating your CSP Account

- a) Complete the Create an account form
- b) Complete Email Verification
- c) Join an Existing Account
- d) Complete the CSP Onboarding Wizard
- e) Optional Subscriptions

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3a. Creating Your CSP Account

Complete the Create an account form

- Immediately after clicking the Join Coupa button via email, you will be redirected to the CSP to register by filling out a form
- Please fill out all required fields *, accept the T&C's and then click the Create an Account button
 - Please note: Some of the information may be prepopulated from the information we have on file for your company



If your company already has a CSP account, you can click **Log In** instead and skip registering a new account

Create an account

Savage is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Savage so you're ready to do business together.

* Business Name
SIM UAT Scenario 1_PH
Your legal business name (or legal personal name if an individual)

* Email
patrickharden@savageco.com

* First Name
Last Name

* Password
Confirm Password
Use at least 8 characters and include a number and a letter.

* Country/Region
Tax Registration ⓘ
#####

☐ I do not have a Tax ID

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

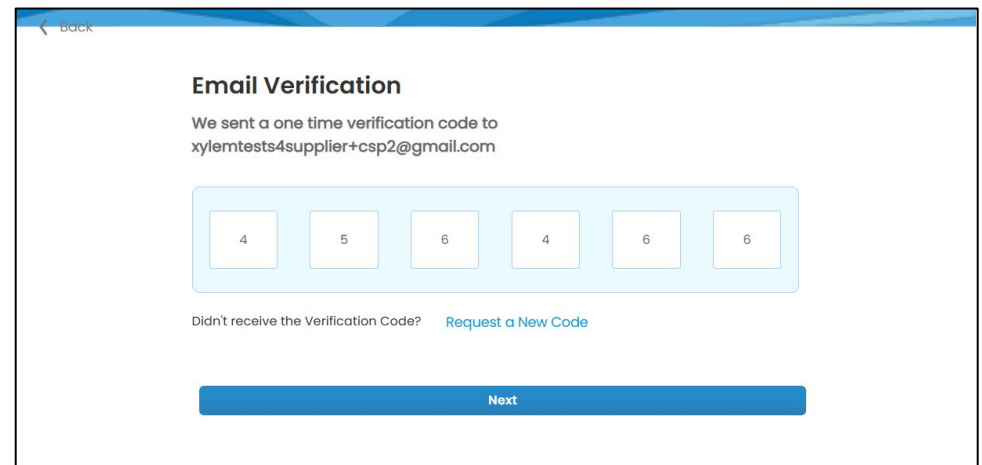
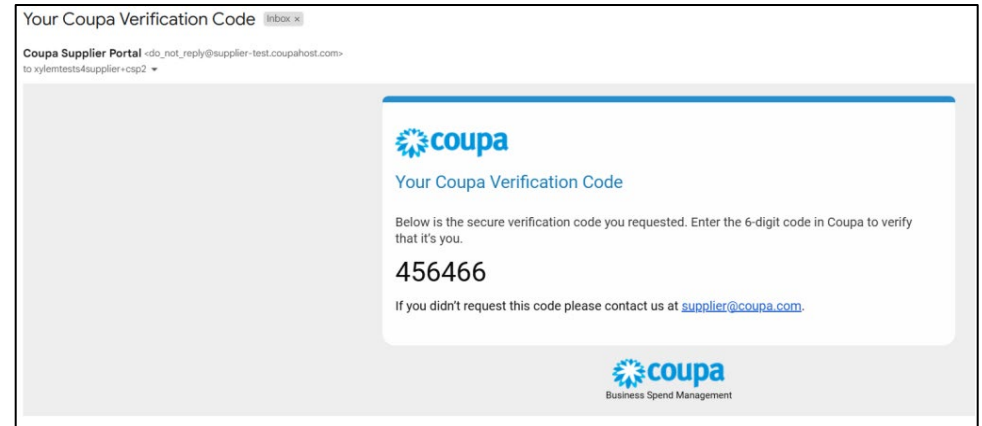
Create an account

Already have an account? [Log In](#)

3b. Creating Your CSP Account

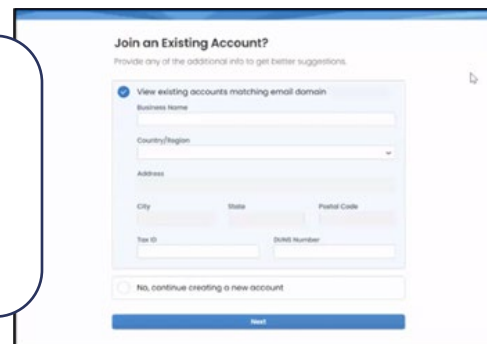
Complete Email Verification

- A verification code will be sent to your email.
- Enter the Verification Code and click Next.
- If the verification fails, double check the code and re-enter, or click 'Request a New Code' to be sent a new code via email.



We recommend saving <https://supplier.coupahost.com> as a bookmark

After verifying you may see the Join an Existing Account screen. This process allows you to join any account that is already set up for your company.



3c. Creating Your CSP Account

Join an Existing Account

- After verifying you may see the Join an Existing Account screen. This process allows you to join an account that is already set up for your company if one already exists.
- You can fill out the fields and click Next to search for other company accounts
- Alternatively, you can choose No, continue creating a new account



The Join an Existing Account only appears if Coupa recognizes that there is another account that shares your company's email domain.

Join an Existing Account?
Provide any of the additional info to get better suggestions.

☒ View existing accounts matching email domain

Business Name

Country/Region

Address

City State Postal Code

Tax ID (VAT) Number

☐ No, continue creating a new account

Next

3d. Creating Your CSP Account

Complete the CSP Onboarding wizard

- The CSP Onboarding wizard will appear for new accounts and prompt you to enter your Primary Address and Payment Methods for your Business Profile.
- Fill out your Primary Address then click Save and Next
- The wizard will prompt you to fill out your tax registration information. When complete, click Save and Next.
 - This section is critical to manage transactions with buyers and several processes in Coupa. You cannot change your country and tax registration information after this step.

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

1 Primary Address
Provide the main address associated with your business.

2 Payment Methods
(Virtual Card | Bank Transfer | Remit-To Address)

Primary Address

* Country/Region * Address Line 1 Address Line 2
City State Postal Code

Save and Next

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

✓ Primary Address saved successfully

✓ Primary Address
Provide the main address associated with your business.

2 Payment Methods
(Virtual Card | Bank Transfer | Remit-To Address)

Virtual Card
Please enter the following information to receive Virtual Card payments.

Account Nickname * Email Address *

☐ Process credit cards automatically

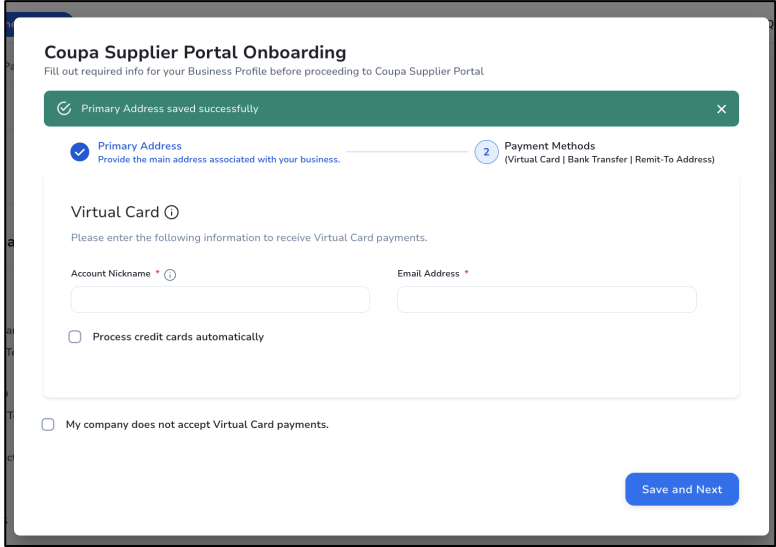
☐ My company does not accept Virtual Card payments.

Save and Next

3d. Creating Your CSP Account

Complete the CSP Onboarding wizard (continued)

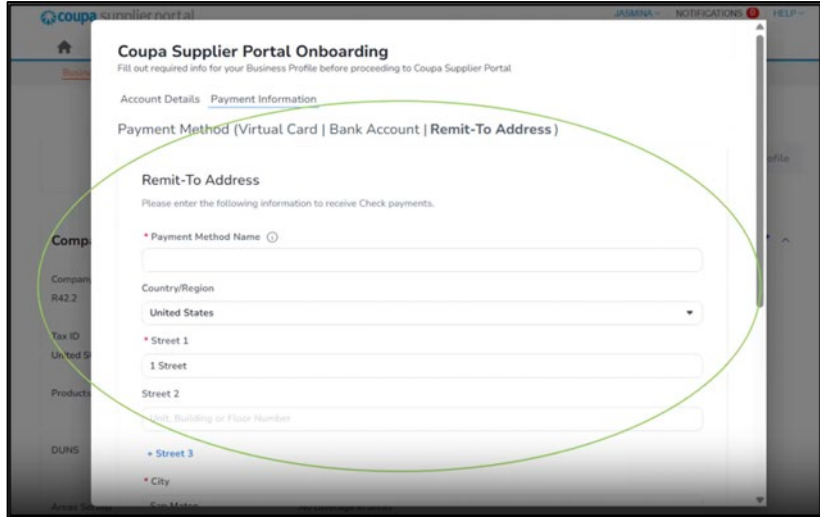
- Next, you will need to create a Payment Method.
 - You have three options to choose from.
 - Virtual Card (not supported by Savage)
 - Bank Transfer
 - Remit-To Address (recommended option)
- You must choose one of the options to enable invoicing.
- To skip setting up a payment method, click the 'My company does not accept ...' button located in the bottom left-hand corner. Then click Save and Next to proceed to the next method.



The screenshot shows the 'Coupa Supplier Portal Onboarding' screen. At the top, a green banner indicates 'Primary Address saved successfully'. Below this, there are two tabs: '1 Primary Address' (active) and '2 Payment Methods'. Under the 'Payment Methods' tab, the 'Virtual Card' option is selected. The form prompts the user to 'Please enter the following information to receive Virtual Card payments.' and includes fields for 'Account Nickname' and 'Email Address'. There are two checkboxes: 'Process credit cards automatically' (unchecked) and 'My company does not accept Virtual Card payments.' (unchecked). A 'Save and Next' button is located at the bottom right.



If you close the onboarding screen by mistake, you can setup or edit your payment methods and legal entities under the Business Profile tab.

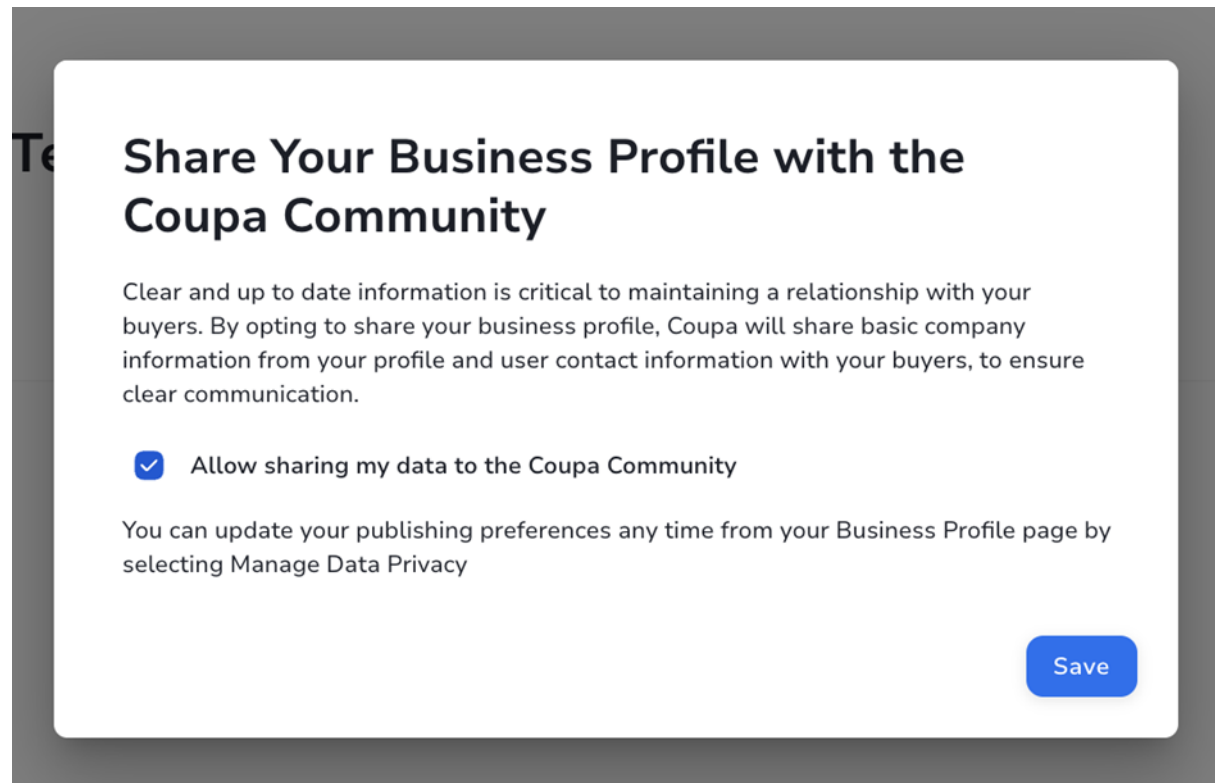


The screenshot shows the 'Coupa Supplier Portal Onboarding' screen, specifically the 'Remit-To Address' section. The 'Payment Method' tab is active, showing options for 'Virtual Card', 'Bank Account', and 'Remit-To Address'. The 'Remit-To Address' section prompts the user to 'Please enter the following information to receive Check payments.' and includes fields for 'Payment Method Name', 'Country/Region' (set to 'United States'), 'Street 1' (set to '1 Street'), 'Street 2', 'City', and 'State'. A green oval highlights the 'Remit-To Address' section.

3d. Creating Your CSP Account

Complete the CSP Onboarding wizard (continued)

- Select if you want to share your business information (Business Profile) with the Coupa Community.
- Selecting this option allows other customers to see your business information and participate in open sourcing events.



The screenshot shows a modal dialog box titled "Share Your Business Profile with the Coupa Community". The dialog has a white background and is set against a dark gray backdrop. The title is in bold black text. Below the title, there is a paragraph of text explaining that clear and up-to-date information is critical for maintaining a relationship with buyers, and that by sharing the business profile, Coupa will share basic company information and user contact information to ensure clear communication. Below this text is a checkbox that is checked, with the label "Allow sharing my data to the Coupa Community". At the bottom of the dialog, there is a line of text stating "You can update your publishing preferences any time from your Business Profile page by selecting Manage Data Privacy". In the bottom right corner of the dialog, there is a blue button with the text "Save".

Share Your Business Profile with the Coupa Community

Clear and up to date information is critical to maintaining a relationship with your buyers. By opting to share your business profile, Coupa will share basic company information from your profile and user contact information with your buyers, to ensure clear communication.

☒ Allow sharing my data to the Coupa Community

You can update your publishing preferences any time from your Business Profile page by selecting Manage Data Privacy

Save

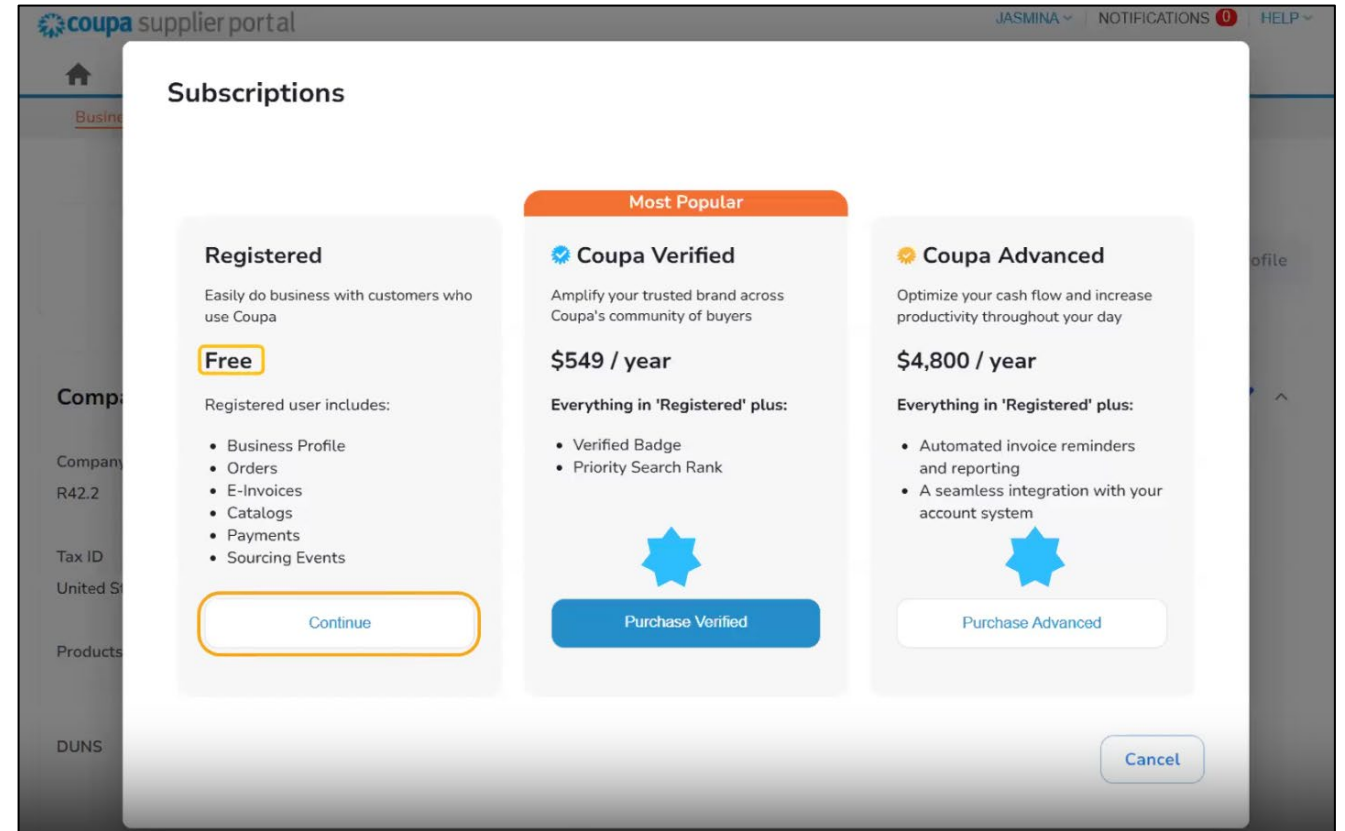
3e. Creating Your CSP Account

Optional Subscriptions

- On the last page of the CSP Onboarding wizard (and on the homepage) Coupa will invite you to sign up for paid subscriptions (Coupa Verified and Coupa Advanced) or opt for a free account.
- To finalize setup of your Free account, click the Continue button.



The free option is more than adequate to work with Savage companies. Subscriptions are optional and can be signed up for later



4

4. Supplier Information Forms

- a) Business Profile Information Requests Form Page
- b) Complete the Initial External Update Form
- c) Future External Update Forms
- d) Forms Reminders and Alerts

[Back to Table of Contents](#)

4a. Supplier Information Forms

Business Profile Information Requests Form Page

- After the onboarding wizard closes, the Forms page should automatically load. Please complete the External Update Form. This initial external form is critical. It allows you to submit contact and financial information to Savage so we can create a supplier record with payment details for your company.
 - Submission of banking information does not automatically create or update the payment records we have on file. Upon submission, please expect a call from Savage Accounts Payable for banking verification.
- To open the form, click the form name.



If you close out of the Forms page or it doesn't automatically load, go to: Business Profile > Information Requests

coupa Supplier Portal

Upgrade ? PH

Invoices Orders **Business Profile** Service Sheets Items ASN Sourcing Forecasts Catalogs Community Workers Add-ons Dashboards Setup More ▾

Business Profile Profile Submissions Legal Entities Payment Methods Information Requests Performance Evaluation Subscriptions

Savage - Savage Test Supplier ABC123 Select Customer Savage - Savage Test Supplier ABC123 ▾

Forms

Fill out and submit the **New or Draft** forms. You can update your information on forms at any time.

Form	Status	Created Date	Submitted At
External Supplier Update (System Form)	New	06/25/2026	None

View All ▾ Advanced Search 🔍

Per page 15 | 45 | 90

4b. Supplier Information Forms

Complete the Initial External Update Form

- The form will have some information prefilled in from your Profile.
- Complete all sections and click Submit.
- For more info refer to the SIM instructions here: [Savage Supplier Information Management \(SIM\)](#)

Savage - Savage Test Supplier ABC123

Select Customer: Savage - Savage Test Supplier ABC123

✓ We have auto-filled some information from your Public Profile.

[View All Responses](#)

External Supplier Update (System Form)

External Supplier Update (System Form)

Supplier Information

Savage Test Supplier ABC123

* Name

Savage Test Supplier ABC123

Alternate Company Name

Doing Business As

Primary Address

Address Purpose

Select Some Options

Region

Country/Region

United States

State/Region

UT

State ISO Code

Address Name

Savage Test Supplier ABC123

Street Address

Test 1

4c. Supplier Information Forms

Future External Update Forms

- Savage may send your company requests for updates via a similar External Update Form at some point in the future to help us gather any contact or financial information that has changed since this initial setup.

The screenshot displays a web form titled "Savage - Savage Test Supplier ABC123". At the top right, there is a "Select Customer" dropdown menu with "Savage - Savage Test Supplier ABC123" selected. Below the title, a yellow banner states: "✓ We have auto-filled some information from your Public Profile." A link "View All Responses" is visible. The form is categorized as "External Supplier Update (System Form)".

Supplier Information
Savage Test Supplier ABC123

*** Name**
Savage Test Supplier ABC123

Alternate Company Name
[Empty text field]

Doing Business As
[Empty text field]

Primary Address

Address Purpose
Select Some Options ⓘ

Region
Country/Region
United States ▼

State Region
UT ▼ ⓘ

State ISO Code
[Empty text field]

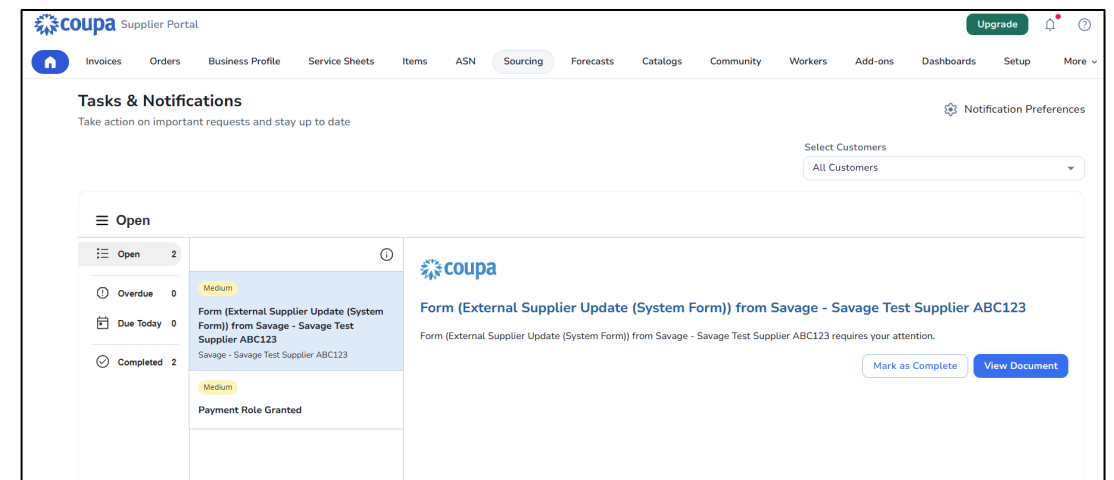
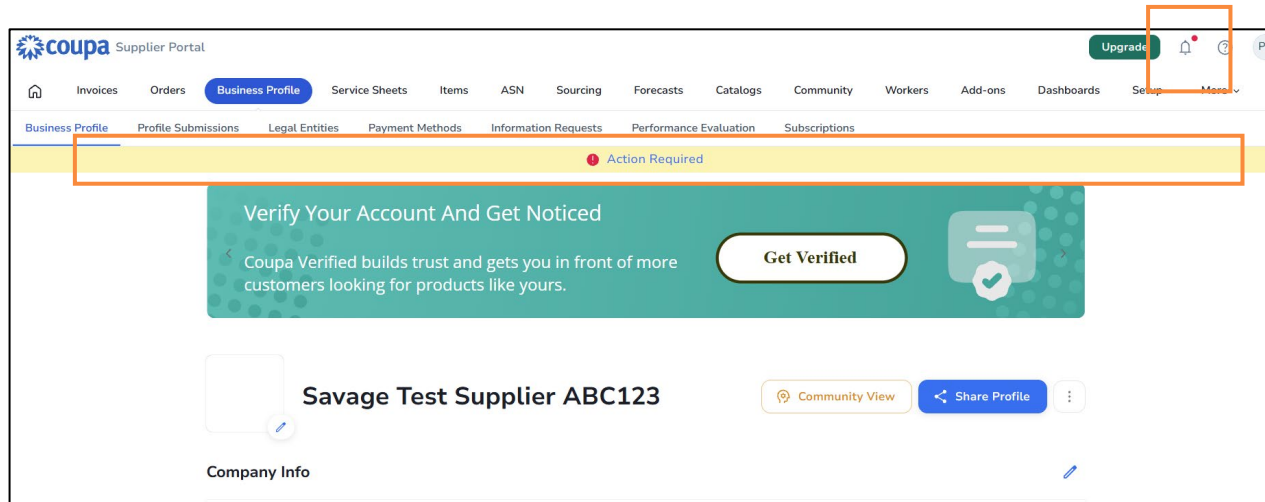
Address Name
Savage Test Supplier ABC123

Street Address
Test 1

4d. Supplier Information Forms

Form Reminders and Alerts

- If you have not completed an External Form, Coupa will send you reminders via email after 2, 5, 10, and 15 days. If not completed in 30 days, the form will be canceled, and Savage will need to reissue a new form.
- Coupa also alerts you of new or incomplete forms within the CSP via:
 - An Action Required banner on the Business Profile page
 - A red dot on the Notifications icon (Bell)
- Click on Action Required then the linked form to finish filling out the form. You can alternatively click on the Notifications icon and then the form link to get to an uncompleted form



5



5. Managing Your CSP Account

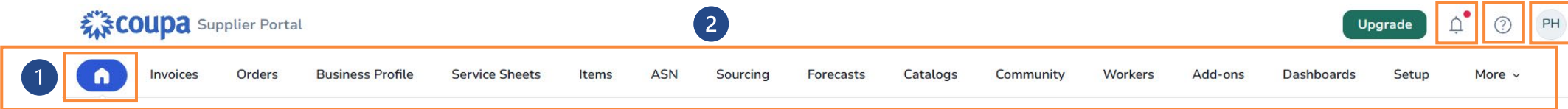
- a) Home Page Navigation
- b) Account Settings
- c) Notification Preferences
- d) Security & Multi Factor Authentication
- e) Help Menu
- f) Tasks & Notifications Workbench

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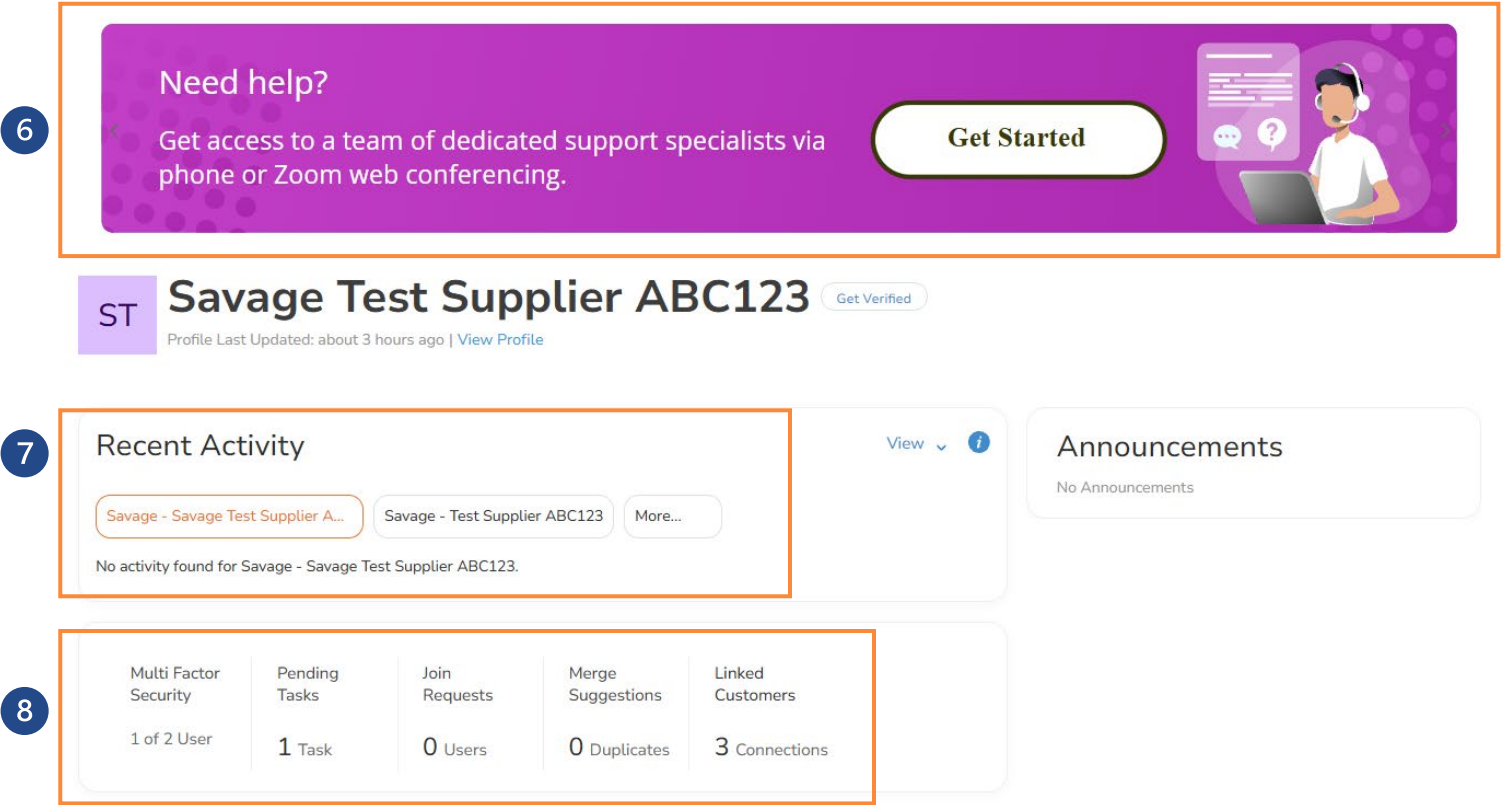
5a. Managing Your CSP Account

Home Page Navigation

3 4 5



- 1. **Home Icon** – Takes user back to Home Page
- 2. **Navigation Bar** – Horizontal tool bar at top with CSP sections
- 3. **Tasks & Notifications** – Act and stay up to date on important alerts
- 4. **Help** – Welcome Tour and other resources
- 5. **Account Settings** – Access to user profile
- 6. **Scrolling Banner** – Links to various Coupa offers and highlighted info
- 7. **Recent Activity** –
- 8. **Admin Overview** –



5b. Managing Your CSP Account

Account Settings

- Click on your profile initials in the top right corner then Account Settings
- On the My Account Settings page, you can make changes to your contact info
 - Name
 - Phone Number
 - Password

The screenshot displays the Coupa Supplier Portal interface. At the top, the Coupa logo and 'Supplier Portal' text are visible. A navigation bar includes links for Invoices, Orders, Business Profile, Service Sheets, Items, ASN, Sourcing, Forecasts, Catalogs, Community, Workers, and Add-ons. In the top right corner, there are buttons for 'Upgrade', a notification bell, a help icon, and a profile icon labeled 'PH'. A dropdown menu is open from the 'PH' icon, showing the following options: 'Account Settings' (highlighted), 'Notification Preferences', 'Security & MFA', and 'Log Out'. Below the navigation bar, the 'My Account Settings' page is shown. On the left is a sidebar with a 'Settings' section containing links for 'Notification Preferences', 'Security & Multi Factor Authentication', and 'App Connections'. The main content area is titled 'User Details' and contains form fields for: * First Name (Patrick), * Last Name (Harden), * Email (procurement@savageco.com), Purpose, Phone Number, Country/Region (dropdown), Code, Phone Number, and Extension. A 'Save' button is located at the bottom right of the 'User Details' section. Below this is a 'Change Password' section with a 'Change Password' link. A small icon with three stars is visible in the bottom right corner of the page.

5c. Managing Your CSP Account

Notification Preferences

- Selecting Notification Preferences allows you to adjust the types of notifications you would like to receive and how they are sent (Online, Email and/or SMS)
 - If you are not being notified of pertinent transactions such as new orders, please review which you have selected.

My Account

Notification Preferences

You will start receiving notifications when your customers enable them.

Email

procurement@savageco.

Mobile(SMS)

+1

Verify

⚠ Verify number to receive SMS

Account Access

Request to Join	☒ Email	☐ SMS
Merge Request	☒ Email	☐ SMS

Announcements

New Customer Announcement	☐ Email	☐ SMS
---------------------------	--------------------------------	------------------------------

Catalogs

A new comment is received	☒ Email	☐ SMS
A catalog is approved	☐ Email	☐ SMS
A catalog is rejected	☐ Email	☐ SMS
A catalog is about to expire	☐ Email	☐ SMS

Community

Community Role Given to User	☒ Email	☐ SMS
------------------------------	---	------------------------------

5d. Managing Your CSP Account

Security & Multi Factor Authentication

- Multifactor authentication (MFA) is a security feature Coupa uses to protect accounts. It requires users to provide two or more verification factors to gain access to the Coupa Supplier Portal (CSP).
- To control MFA, go to the Security & Multi Factor Authentication page.
- You can choose when MFA is required and the method of MFA you wish to use
- Options when MFA is required:
 - For Payment Changes
 - Only requires MFA when making changes to your Legal Entities and Payment Methods
 - For Both Account Access (Login) and Payment Changes
 - Requires MFA when logging into the CSP and changes to Legal Entities and Payment Methods.

My Account Security & Multi Factor Authentication

[Settings](#)
[Notification Preferences](#)
[Security & Multi Factor Authentication](#)
[App Connections](#)

Multi Factor Authentication

☒ For Payment Changes (Required for changing Legal Entity or Remit-To)
☐ For Both Account Access (Login) and Payment Changes

Via Authenticator App
Use an Authenticator App available from your mobile phone app store.
☐ Default

Via Text Message
Use a code sent via text message to your phone number.
☐ Default

Via Passkey
Use a passkey stored in your browser or on your device.
☐ Default

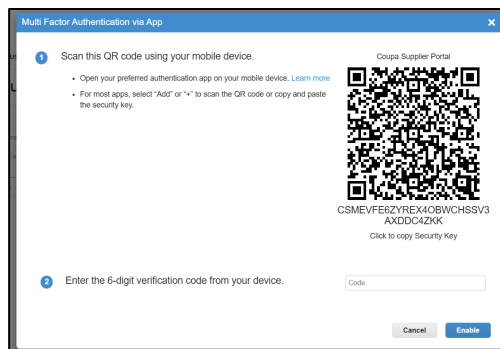
Via Alternative Email
Use a code sent to an alternate email
☐ Default

Multiple customers does not allow email as an MFA factor. Please select a different factor.

5d. Managing Your CSP Account

Security & Multi Factor Authentication (continued)

- MFA method options include:
 - Via Authenticator App'
 - Requires the use of a third-party app such as the Google Authenticator or Apple Authenticator from their respective app stores.
 - Via Text Message
 - Via Passkey
- Coupa will prompt you to setup MFA Via Authenticator App when you first select the Security & Multi Factor Authentication page.
 - You can bypass this by selecting Cancel to see the other methods.



My Account Security & Multi Factor Authentication

[Settings](#)
[Notification Preferences](#)
[Security & Multi Factor Authentication](#)
[App Connections](#)

Multi Factor Authentication

☒ For Payment Changes (Required for changing Legal Entity or Remit-To)
☐ For Both Account Access (Login) and Payment Changes

Via Authenticator App

Use an Authenticator App available from your mobile phone app store.

☐ Default

Via Text Message

Use a code sent via text message to your phone number.

☐ Default

Via Passkey

Use a passkey stored in your browser or on your device.

☐ Default

Via Alternative Email

Use a code sent to an alternate email

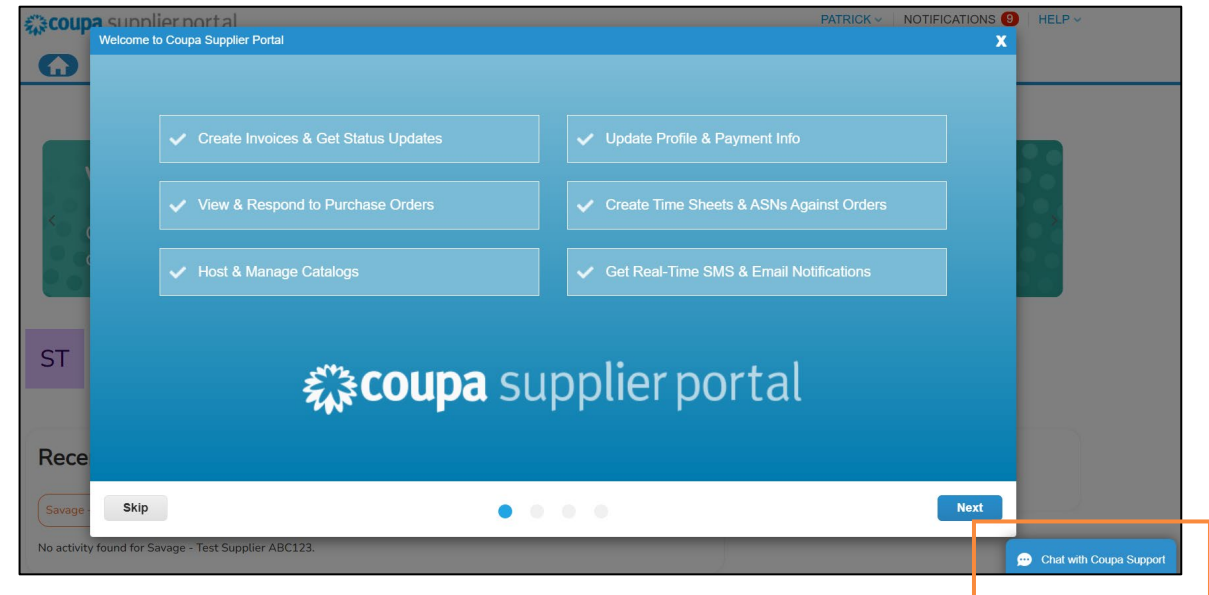
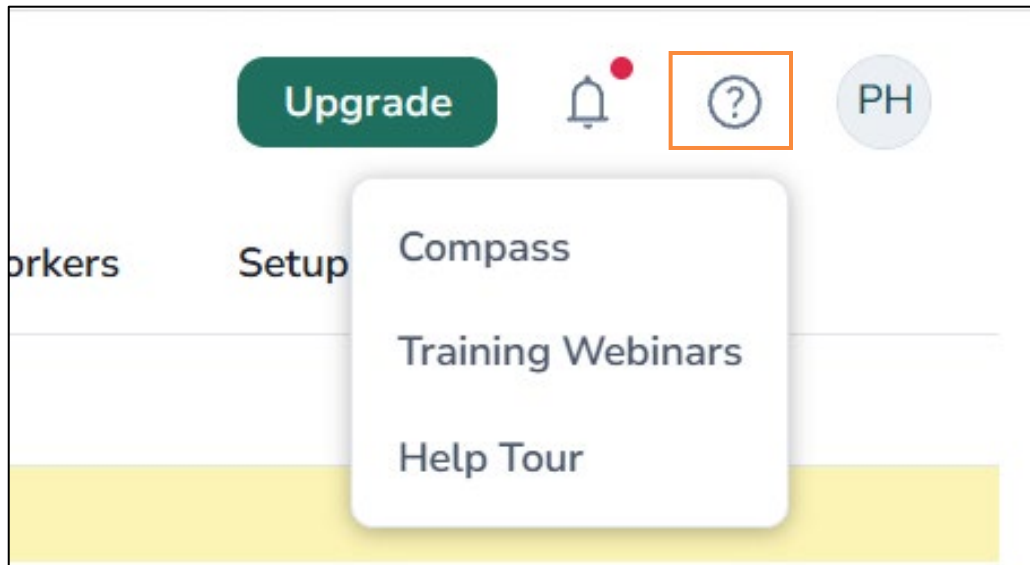
☐ Default

Multiple customers does not allow email as an MFA factor. Please select a different factor.

5e. Managing Your CSP Account

Help Menu

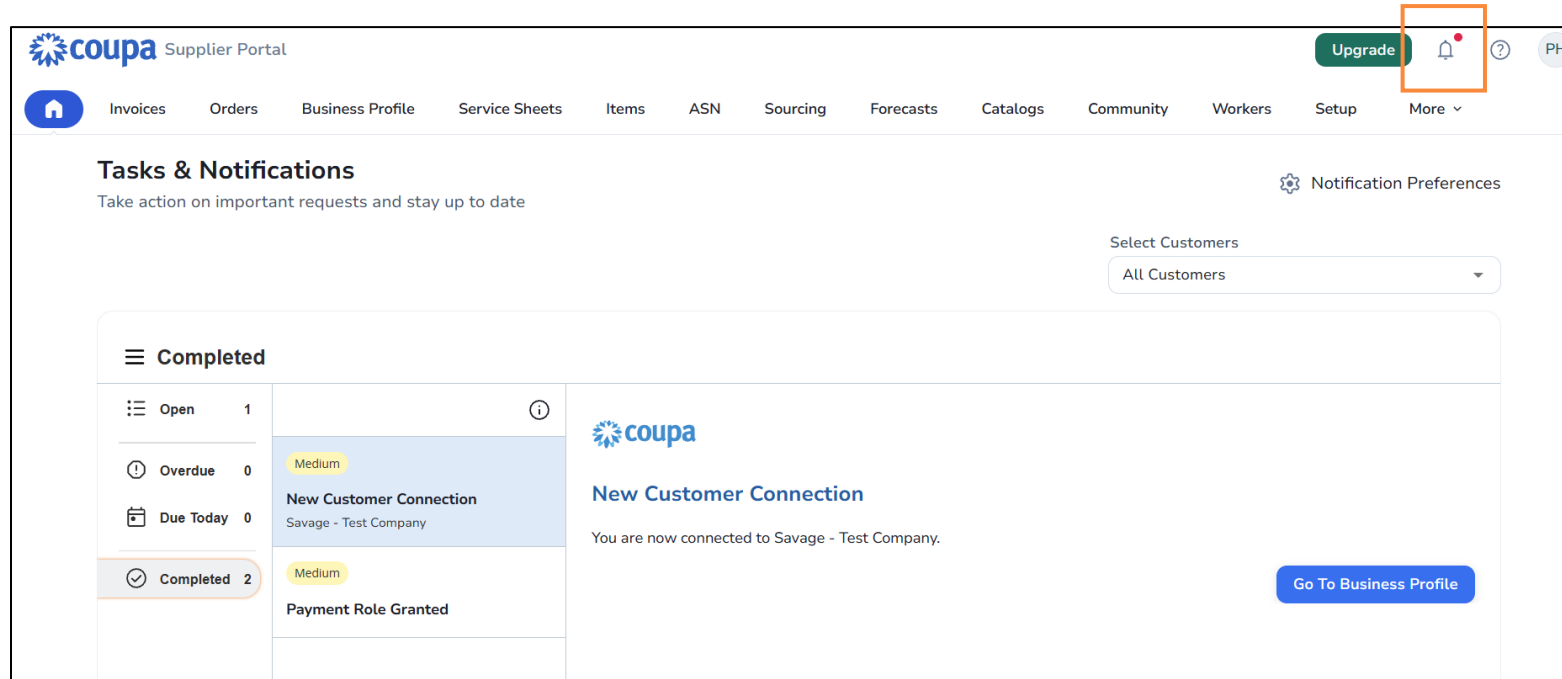
- You can view Compass Articles, Training Webinars and the Help Tour (Welcome Tour) any time by clicking on the HELP menu (?) in the top right corner
- For additional help, users can click on the Chat with Coupa Support button in the bottom right corner. Coupa Support can assist you with technical issues



5f. Managing Your CSP Account

Tasks & Notifications Workbench

- To access the Task & Notifications Workbench, click the bell icon on the top right of the main screen
- The Workbench is designed to streamline and simplify work management by providing a centralized view that consolidates all requests pending your action such as onboarding tasks, Business Profile requests from other users in your company and Information requests from linked customers.





6. Setup and Business Profile

- a) Admin Users
- b) Setup - Users Section
- c) Setup - Merge Requests and Merge Suggestions
- d) Business Profile
- e) Business Profile – Legal Entities
- f) Business Profile – Payment Methods

[Back to Table of Contents](#)

6a. Setup and Business Profile

Admin Users

- By default, the user that created a new CSP account is given the Admin role.
- Admins:
 - Manage account-wide settings by navigating to the Setup or Business Profile tabs in the navigation bar
 - Have all permissions turned on by default
 - Invite other users to join the CSP account
 - Control the roles and permissions of users they invite to join
 - Manage Merge Requests and Merge Suggestions
 - Manage Financial information

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar contains several tabs, with 'Business Profile' and 'Setup' highlighted by orange boxes. The 'Setup' button is also highlighted by a green box. Below the navigation bar, the 'Admin Users' section is visible, featuring a table of users. The table has columns for User Name, Email, Status, Permissions, Customer Access, Purpose, and Actions. A user named 'Gorish Kasliwal' is listed with an 'Inactive' status. The 'Permissions' column lists various system functions, and the 'Customer Access' column shows 'Savage - Savage Test Supplier ABC123'. The 'Purpose' column shows 'Accounting'. The 'Actions' column has 'Activate' and 'Delete' links.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
Gorish Kasliwal	[REDACTED]	Inactive	ASNs Admin Catalogs Community Contracts Early Payments Forecast Planner Hidden, Private, and Public Inventory Invoice Financing Invoices Navi Access Order Changes Order Line Confirmation Orders Payment Method Admin Payments Profiles Restricted	Savage - Savage Test Supplier ABC123	Accounting	Activate Delete

6b. Setup and Business Profile

Setup - Users Section

- Admin can invite, edit or deactivate a user in the Users section of the Setup Tab
- To invite a new user: Go to Setup > Admin > Users > Invite User. Enter the name and email of the user to invite.
- To edit a users permission click Edit under the Actions column. This allows an admin to control which customers a user can transact with.
- To deactivate a user click Edit, scroll down and click Deactivate User

coupa Supplier Portal

Upgrade

Admin Users

Invite User

Showing results for sup

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
Supplier Success		Active	ASNs Admin Catalogs Community Contracts Early Payments Forecast Planner Hidden, Private, and Public Inventory Invoice Financing Invoices Navi Access Order Changes Order Line Confirmation Orders Profiles Restricted Worker Access Restricted Worker Assignment Access Service Sheets	Savage - Savage Test Supplier ABC123 Savage - Test Company	Accounting	Edit

Invite User

User Information

First Name
Last Name
Email

Phone Number

Country/Region
Area Code
Number

Purpose

Permissions

Customers

Edit user access for Supplier Success

User Information

First Name
Last Name
Email

Phone Number

Country/Region
Area Code
Number

Purpose

Permissions

Customers

6c. Setup and Business Profile

Setup - Merge Requests and Merge Suggestions

- 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 at different times.
- Admins have access to merge these accounts if needed in the Merge Requests and Merge Suggestions sections.



Visit the Coupa Compass portal for more information [Manage Merge Requests](#)

The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes the Coupa logo, user name 'PATRICK', notifications '13', and a 'HELP' link. Below this is a main navigation bar with links: Home, Invoices, Orders, Business Profile, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Workers, Add-ons, Setup (highlighted), and More... The 'Admin' section is active, showing 'Connection Requests'. The 'Admin Merge Requests' page has a left sidebar with links: Users, Worker Portal Access, Merge Requests (highlighted), Merge Suggestions, Requests to Join, Fiscal Representatives, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main content area is titled 'Initiate Merge Request' and contains a text input field with 'coupa@coupamail.edu', a checkbox for 'I'm not a robot' next to a reCAPTCHA logo, and a warning message: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.' Below the warning is a 'Request Merge' button. At the bottom, there is a section 'Open merge requests' with the text 'All clear! No open merge requests.'

6d. Setup and Business Profile

Business Profile

- The Business Profile tab allows Admins to manage the Company Info, Contacts and Addresses added during Onboarding. Admins can also control financial info under the sub tabs for Legal Entities and Payment Methods

Orders

Business Profile

Service Sheets

Items

ASN

Sourcing

Forecasts

Catalogs

Community

Workers

Add-ons

Dashboards

Profile Submissions

Legal Entities

Payment Methods

Information Requests

Performance Evaluation

Subscriptions

Action Required

Verify Your Account And Get Noticed

Coupa Verified builds trust and gets you in front of more customers looking for products like yours.

Get Verified

Savage Test Supplier ABC123

Community View

Share Profile

Company Info

Company Name

Savage Test Supplier ABC123

Tax ID

Industry

Year Established

About

Commodities

Contacts

Add User

Search

Name	Primary Contact	Email	Work Number	Purpose	Actions
Gorish Kasliwal	No	OracleSystemAdmin@Savageco.com		Accounting	
Patrick Harden	Yes	procurement@savageco.com			
Supplier Success	No	supplier@savageco.com		Accounting	

Per page 5 | 15 | 30

Addresses

Add Address

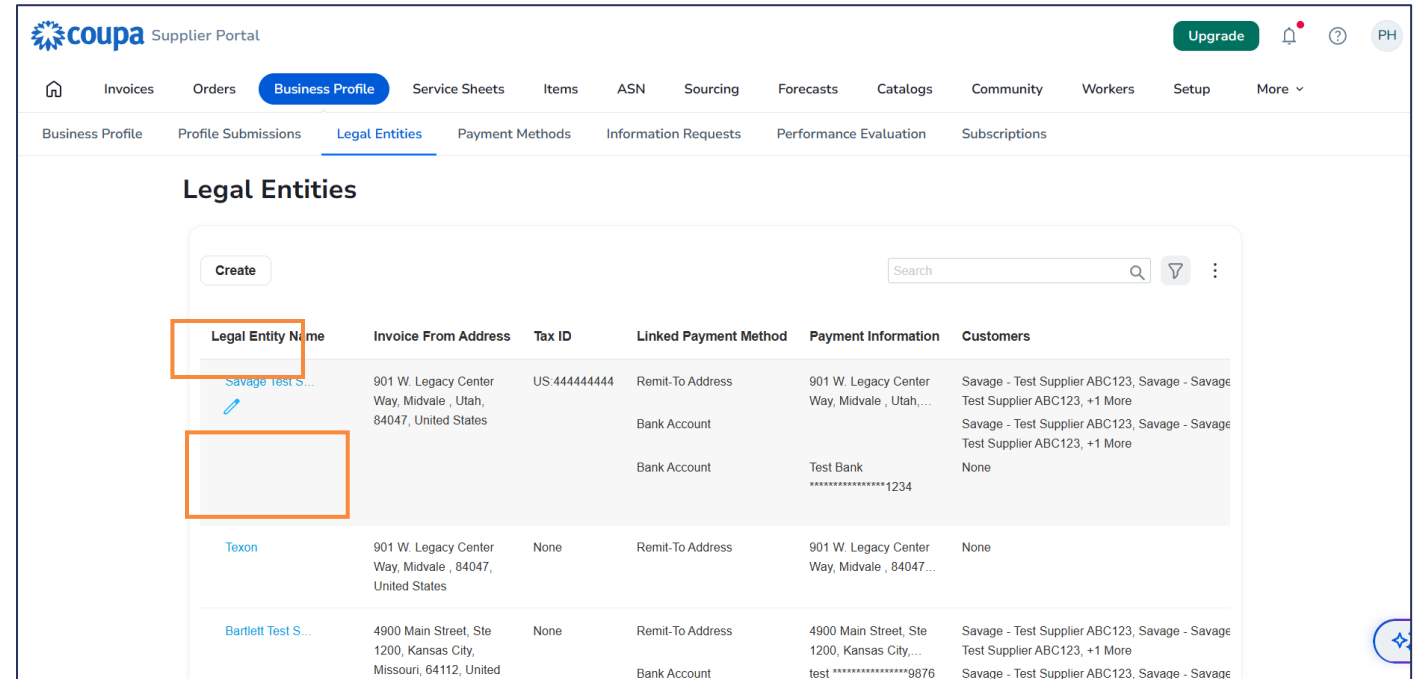
Search

Address	Primary Address	City	State	Postal Code	Country/Region	Actions
Test 2	No	Denver	Colorado	10000	US	
Test 1	Yes	Salt Lake City	Utah	84111	US	

6e. Setup and Business Profile

Business Profile – Legal Entities

- Admins can Create or Edit their company Legal Entity info on the Legal Entities section under the Business Profile tab.
- Legal Entities consist of:
 - Legal Entity Name (Your company name(s))
 - Tax Registration (Tax ID and Country)
 - Addresses (Invoice From, Ship From, Remit-To)
 - Linked Payment Method
 - Customers (assigned to view POs & create invoices)



Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
Savage test S...	901 W. Legacy Center Way, Midvale, Utah, 84047, United States	US 444444444	Remit-To Address	901 W. Legacy Center Way, Midvale, Utah,...	Savage - Test Supplier ABC123, Savage - Savage Test Supplier ABC123, +1 More
			Bank Account		Savage - Test Supplier ABC123, Savage - Savage Test Supplier ABC123, +1 More
			Bank Account	Test Bank *****1234	None
Texon	901 W. Legacy Center Way, Midvale, 84047, United States	None	Remit-To Address	901 W. Legacy Center Way, Midvale, 84047...	None
Bartlett Test S...	4900 Main Street, Ste 1200, Kansas City, Missouri, 64112, United	None	Remit-To Address	4900 Main Street, Ste 1200, Kansas City,...	Savage - Test Supplier ABC123, Savage - Savage Test Supplier ABC123, +1 More
			Bank Account	test *****9876	Savage - Test Supplier ABC123, Savage - Savage



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

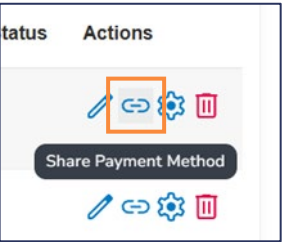
- You can edit a Legal Entity by hovering over the Legal Entity name and clicking the pencil icon that appears
- Be sure that Savage is listed as a Customer to your Legal Entity

6f. Setup and Business Profile

Business Profile – Payment Methods

- Admins can Add or Edit Payment Methods in the Payment Methods section of Business Profile
- Use the Add Payment Method to create a new method
- From the action column you can Edit Payment Method, Share Payment Method, Manage Linked Customers and Deactivate Payment Method.
- Savage does not use Coupa Pay (we pay via ACH) but we need suppliers to create a Payment Method 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 Linked Customer to a Payment Method. Click Share Payment Method and check the box next to Savage and click Share Payment Method

A screenshot of the Coupa Supplier Portal 'Payment Methods' page. The page has a top navigation bar with 'Invoices', 'Orders', 'Business Profile' (selected), 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Community', 'Workers', 'Setup', and 'More'. Below this is a sub-navigation bar with 'Business Profile', 'Profile Submissions', 'Legal Entities', 'Payment Methods' (selected), 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area is titled 'Payment Methods' and contains a table with columns: 'Payment Method', 'Payment Method Name', 'Country', 'Currency', 'Linked Legal Entity', 'Shared With Customers', 'Payment Method Status', and 'Actions'. The table lists three payment methods, all of type 'Bank Transfer'. The 'Actions' column for each row contains four icons: a pencil, a chain link, a gear, and a trash can. The 'Add Payment Method' button is highlighted with an orange box. The 'Actions' column icons are also highlighted with an orange box.

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Test Payment Method 3	United States	USD	Savage Test Supplier ABC123		Active	   
Bank Transfer	Test Payment Method 12345-v2	United States	USD	Bartlett Test Supplier DEF456	Savage - Test Supplier ABC123, Savage - Savage Test Supplier ABC123 +1 more	Active	   
Bank Transfer	Test Payment Method 123	United States	USD	Savage Test Supplier ABC123	Savage - Test Supplier ABC123, Savage - Savage Test Supplier ABC123 +1 more	Active	   

7. Purchase Orders

- a) Orders
- b) Purchase Order
- c) PO Emails

[Back to Table of Contents](#)



7a. Purchase Orders

Orders

- CSP users can manage POs from Savage and other customers on the Orders tab
- The page results can be filtered to Savage using the Select customer drop-down menu
- You can drill into more detail of a PO by clicking on the hyperlinked PO #
- You can also change the View, Search or choose an Action
- There are two Actions icons under the Action column
 - Gold coins Create an Invoice from the corresponding PO
 - Red coins Create a Credit Note

coupa Supplier Portal

Upgrade

Home Invoices **Orders** Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Community Setup More

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Delivery Schedule Shipments

Select customer Savage - Savage Test Supplier AB

Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to	View	Open Orders	Search				
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
US0000012809	06/05/2026	Issued	None	1 Each of abc 123	No	10.00 USD	
US0000012798	04/07/2026	Issued	None	test bpo service	No	1,800.00 USD	
US0000012797	03/25/2026	Issued	None	fake item	No	50.00 USD	
US0000012793	02/18/2026	Issued	None	jan feb mar	No	3,030.00 USD	
CA0000012792	02/13/2026	Issued	None	test item in CAD	No	100.00 USD	
US0000012790	02/12/2026	Issued	None	test	No	52,000.00 USD	

7b. Purchase Orders

Purchase Order

- If you click on a PO Number the detailed view opens. You can then perform the following actions:
 - View General Info including Acknowledge PO and Assign to a User
 - View Ship-To Address
 - Add Shipment Tracking
 - Create Invoice
 - Print View
 - Add Comment (to Savage)

Purchase Order #US0000012798

General Info

Status

Issued - Sent via Email

Order Date

04/07/2026

Revision Date

04/07/2026

Requester

Patrick Harden

Email

patrickharden@savageco.com

Payment Term

Net 60

Secondary Dealer

None

Attachments

None

Acknowledged

☐

Assigned to

Select

Shipping

Ship-To Address

901 W Legacy Center Way
Midvale, UT 84047
United States
Location Code: USUT001
Attn: Patrick Harden

Terms

None

Shipment Tracking

+ Add

No shipment tracking.

Lines

Advanced

Search

Sort by

Line Number: 0 → 9

1	Type	Item	Price	Total	Invoiced
		test bpo service	1,800.00	1,800.00	0.00
	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	
	None	None	None	None	

Per page 15 | 45 | 90

Total USD1,800.00

Create Invoice

Save

Print View

Comments

Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

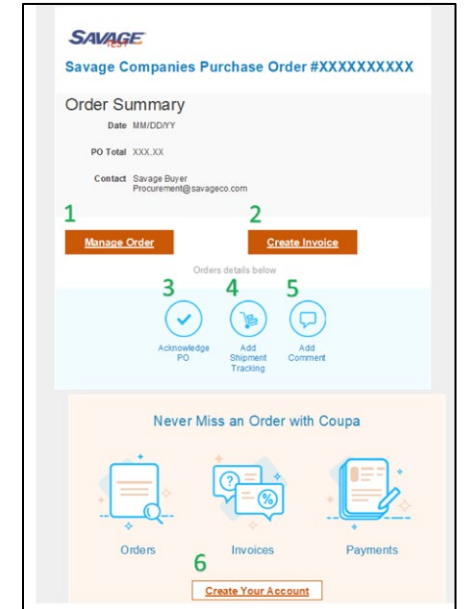
38

7c. Purchase Orders

PO Emails

- When Savage creates a new PO, your users can be notified of the PO in two ways. It is possible to have one or both enabled.
 - SAN copies of the PO: If Savage has a PO contact email on file in our supplier record, Coupa will send a copy of the PO as a Supplier Actionable Notifications (SAN) via email. SAN copies of POs have actionable buttons within the body of the email and a pdf copy of the PO attached. Some suppliers have us set up their sales or customer service teams to receive SAN POs without adding them as users in the CSP.
 - CSP notifications: Coupa will send email notifications for new POs to users assigned to Savage as a customer in the CSP with the A new Order is received notification preference enabled. The email will have a link to View the Order in the CSP to take further action.

Orders		
An order is canceled	☒ Email	☐ SMS
A new order is received	☒ Email	☐ SMS
A new comment is received	☒ Email	☐ SMS



8

8. Invoices

- a) Savage Expectation
- b) Invoices
- c) Create Invoice Header Fields
- d) Create Invoice Line Fields
- e) Create Invoice Summary Fields
- f) Status & Views

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8a. Invoices

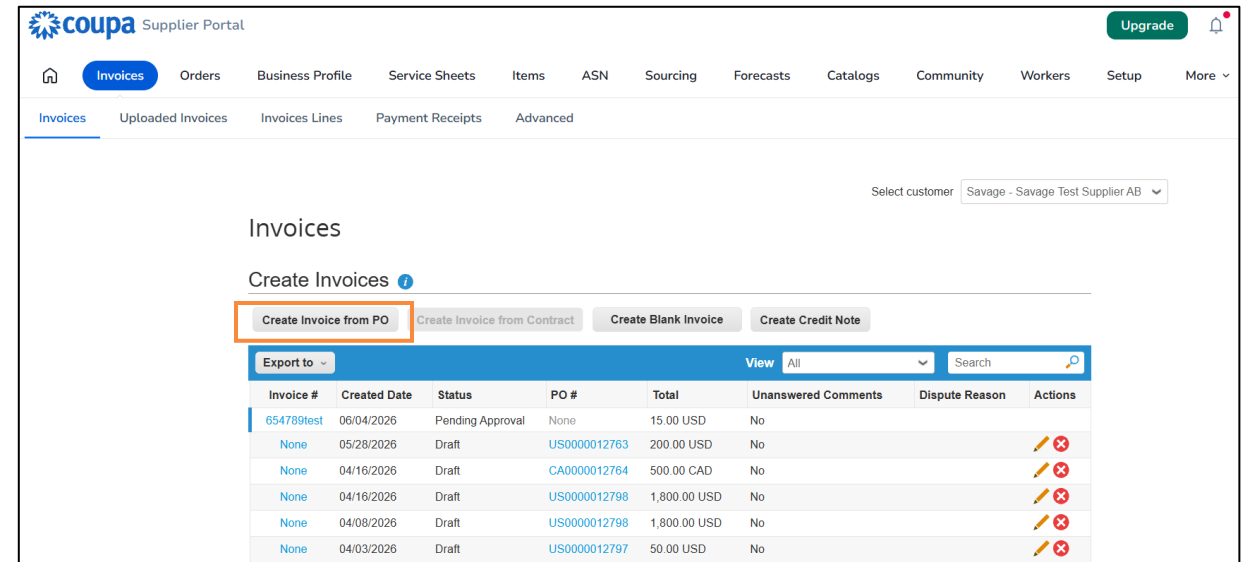
Savage Expectation

- Savage expects suppliers to submit invoices through the CSP.
- Failure to submit invoices via the CSP and/or without referencing a valid PO number may result in delayed processing and payment.

8b. Invoices

Invoices

- Select the Invoices tab to monitor existing Coupa invoices or create new ones
- Suppliers can use the View dropdown menu 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 can be created via:
 - PO Flip (gold coins on the PO tab) 
 - Create Invoice from PO (button on the Invoices tab)
 - Create Invoice button when viewing a PO
- CSP invoices consist of three levels:
 - Header – General Info, Invoice From and To details
 - Line – All line items included on the PO being flipped
 - Summary – Including taxes, Shipping and Handling



coupa Supplier Portal

Upgrade

Invoices Orders Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogs Community Workers Setup More

Invoices Uploaded Invoices Invoices Lines Payment Receipts Advanced

Select customer Savage - Savage Test Supplier AB

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
654789test	06/04/2026	Pending Approval	None	15.00 USD	No		
None	05/28/2026	Draft	US0000012763	200.00 USD	No		 
None	04/16/2026	Draft	CA0000012764	500.00 CAD	No		 
None	04/16/2026	Draft	US0000012798	1,800.00 USD	No		 
None	04/08/2026	Draft	US0000012798	1,800.00 USD	No		 
None	04/03/2026	Draft	US0000012797	50.00 USD	No		 

8c. Invoices

Create Invoice Header Fields

- Populate all the required header fields (General Info, From and To fields)
- We recommend adding an Image Scan and/or an attachment under General Info
- When choosing a From address (specify the Legal Entity, Invoice From Address, Remit-To Address and Ship From Address)
 - These need to be created previously by an Admin during CSP Onboarding or in Business Profile.

Choose Invoicing Details

* Legal Entity: Savage Test Supplier ABC123

Invoice From: 901 W. Legacy Center Way, Midvale, UT 84047, United States, United States (444444444)

* Remit-To: Select

* Ship From Address: Select

Addresses: 901 W. Legacy Center Way, Midvale, UT 84047, United States, United States (444444444)

Bank Accounts: Test123, 901 W. Legacy Center Way, Midvale, UT 84047, United States, United States (444444444)

Cancel

Create Invoice Create

General Info

* Invoice #:

* Invoice Date: 01/10/23

Payment Term: N30

* Currency: USD

Status: Draft

Image Scan: Choose File No file chosen

Supplier Note:

Attachments: Add File | URL | Text

From

* Supplier: Daniel & South LLC

Supplier Tax ID: 123456789

* Invoice From Address: Daniel & South LLC, 10 Main Street, Chicago, IL 60615, United States

* Remit-To Address: Daniel & South LLC, 100 Payment Ave, New York, NY 10305, United States

* Ship From Address: Daniel & South LLC, 10 Main Street, Chicago, IL 60615, United States

To

Customer: Shelby Demo - TEST

* Bill To Address: Shelby Demo, See Invoice Instructions, United States

Buyer Tax ID:

Ship To Address: 18 East 48th Street, New York, NY 10017, United States, Location Code: 0119481, Attn: Bridget Mollaghan

8d. Invoices

Create Invoice Lines Fields

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

Lines

☐ Line Level Taxation

Type	Description	Qty	UOM	Price
	Item from PO	1	Each (EA)	10.00

PO Line

291-1

Service/Time Sheet Line

None

Contract

Credit Line

None

Supplier Part Number

Retainage Indicator

None

Retainage %

None

When applicable, please ensure retainage amount is entered as a separate, negative line. Hines AP will associate with the appropriate backing PO.

Billing

0119481-62005.703-W-13344

8e. Invoices

Create Invoices Summary Fields

- Suppliers can add Summary Level charges (Shipping, Handling, Misc. and Tax) as applicable
- Calculate the invoice total and Submit (and Send) the invoice
- Savage will then receive the invoice in our Coupa instance and will process it for approval and payment

Totals & Taxes

Lines Net Total	10.00
Shipping	
Handling	
Misc	
Tax	0.00 % 0.000
Total Tax	0.00
Net Total	10.00
Total	10.00

Delete

Cancel

Save as Draft

Calculate

Submit

8f. Invoices

Status & Views

- Key Invoice Statuses
 - Approved – Savage completed an internal approval of the invoice making it now eligible for payment according to agreed payment terms
 - Voided – Savage deleted the invoice
 - Disputed – Savage rejected the invoice and likely added a comment as to why
- The View menu can be used to filter results to a given status
 - The Create View option in that menu allows you to make your own view based on selection of columns and conditions
- Savage does not pay through the CSP so invoices will not show Paid only Approved

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	Unans	son	Actions
None	06/20/25	Draft	US0000012548	10,000.00 USD	No	Abandoned	
None	06/20/25	Draft	US0000012548	10,000.00 USD	No	Approved	
None	06/20/25	Draft	US0000012548	10,000.00 USD	No	Credit Notes	
None	06/20/25	Draft	US0000012562	80.00 USD	No	Disputed	
None	06/20/25	Draft	US0000012562	80.00 USD	No	Disputes with a supplier response	
GKTEST14	04/21/25	Approved	None	157.50 CAD	No	Disputes without supplier response	
None	03/21/25	Draft	BA0000012519	8.00 USD	No	Draft	
None	03/21/25	Draft	BA0000012520	12.00 USD	No	Overdue invoices	
None	03/21/25	Draft	BA0000012520	12.00 USD	No	Payment Information	
None	03/21/25	Draft	BA0000012520	12.00 USD	No	Pending Approval	
inv003	02/07/25	Pending Approval	US0000012491	12,999.00 USD	No	Processing	
inv002	02/07/25	Approved	US0000012490	9,999.00 USD	No	Processing Failed	
inv001	02/07/25	Pending Approval	US0000012490	10,001.00 USD	No	Unpaid invoices	
test123	01/31/25	Approved	US0000012483	100.00 USD	No	Voided	

9. Credit Notes

- a) Creating Credit Notes
- b) Credit Notes Header Fields
- c) Credit Notes Line Fields
- d) Credit Notes Summary Fields

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9a. Credit Notes

Creating Credit Notes

- Credit Notes can be created two ways:
 - PO Flip (red coins on the PO tab) 
 - Create Credit Note (button on the Invoices tab)

 Supplier Portal Upgrade 

[Invoices](#) [Orders](#) [Business Profile](#) [Service Sheets](#) [Items](#) [ASN](#) [Sourcing](#) [Forecasts](#) [Catalogs](#) [Community](#) [Workers](#) [Setup](#) [More](#)

[Invoices](#) [Uploaded Invoices](#) [Invoices Lines](#) [Payment Receipts](#) [Advanced](#)

Select customer: Savage - Savage Test Supplier AB

Invoices

Create Invoices 

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

[Export to](#) [View](#) All

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
654789test	06/04/2026	Pending Approval	None	15.00 USD	No		
None	05/28/2026	Draft	US0000012763	200.00 USD	No		 
None	04/16/2026	Draft	CA0000012764	500.00 CAD	No		 
None	04/16/2026	Draft	US0000012798	1,800.00 USD	No		 
None	04/08/2026	Draft	US0000012798	1,800.00 USD	No		 
None	04/03/2026	Draft	US0000012797	50.00 USD	No		 

9b. Invoices

Create Credit Notes Header Fields

- After clicking Create Credit Note a popup box appears asking which Invoice Number you wish to credit. Specify the invoice number and click Continue
- A second box will appear asking if you want to Completely cancel the invoice with a credit note or Adjust invoice with a credit note. Choose between the options and click Create
- Populate all the required header fields (General Info, From and To fields)

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

abc989

Other (e.g. rebate)

Cancel

Continue

Credit Note

How do you want to correct invoice "abc989"?

Completely cancel the invoice with a credit note

Adjust invoice with a credit note

Cancel

Create

Create Credit Note

Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

General Info

From

* Credit Note #

* Credit Note Date

06/20/2025

Payment Term

Net 60

* Currency

USD

Status

Draft

* Original Invoice #

* Original Invoice Date

mm/dd/yyyy

Image Scan

Choose File

No file chosen

Supplier Note

Attachments

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

* Supplier

Savage Test Supplier ABC123

Supplier Tax ID

* Invoice From Address

Savage Test Supplier ABC123
901 W. Legacy Center Way, Midvale ,
Utah, 84047, United States
901 W. Legacy Center Way
Midvale , UT 84047
United States

* Remit-To Address

Savage Test Supplier ABC123
901 W. Legacy Center Way, Midvale ,
Utah, 84047, United States
901 W. Legacy Center Way
Midvale , UT 84047
United States

* Ship From Address

No address selected

To

Customer

Savage

Account #

49

9c. Invoices

Create Credit Notes Lines Fields

- Populate all the required line fields (most will default from the PO)
- Edit adjustment price as needed

Lines

Adjustment Type

Price

Type	Description	Price	100.00
	Test	100.00	

PO Line

US0000012548-1

Contract

Supplier Part Number

Service Date



Billing

1210015-00000-00000000000-501620

+

 Add Line

+

 Pick lines from Contract

9d. Invoices

Create Credit Notes Summary Fields

- Add Summary Level credits as applicable
- Calculate the Credit Note total and Submit the credit note to the customer
- Savage will then receive the credit note invoice in our Coupa instance and will process it

Totals & Taxes

Lines Net Total	10.00
Shipping	
Handling	
Misc	
Tax	0.00 % 0.000
Total Tax	0.00
Net Total	10.00
Total	10.00

DeleteCancelSave as DraftCalculateSubmit

10. Support

a) Who to contact at Savage and Coupa Resources

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10a. Support

Who to Contact at Savage and Coupa Resources

- Who to contact at Savage
 - If you have any questions or need additional assistance, please reach out to our support teams at Savage
 - Supplier Success Team: Supplier@savageco.com
 - Procurement: Procurement@savageco.com
- Coupa Resources
 - CSP reference material for suppliers:
 - [Coupa Supplier Help Center](#)
 - [Coupa Supplier Help FAQs](#)
 - [CSP Webinars](#)
 - Coupa Support email: supplier@coupa.com



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