

# Understanding the Coupa Supplier Portal (CSP) Homepage

# Purpose:

The purpose of this help guide is to show you how to operate the Coupa Supplier Portal (CSP) Homepage

# Scope:

- How to navigate the CSP homepage
- Reviewing your profile health

## How to Navigate the Coupa Supplier Portal (CSP) Homepage

Once you log into the Coupa Supplier Portal the dashboard will display the following actionable categories:

- Home
- Profile
- Orders
- Service/Time Sheets
- ASN
- Invoices
- Catalogs
- Business Performance
- Sourcing
- Add-Ons
- Setup

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| Coupa supplier port al |         |        |                     |     |          |          |                      |          |         |       | HELP V |
|------------------------|---------|--------|---------------------|-----|----------|----------|----------------------|----------|---------|-------|--------|
| Home                   | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogs | Business Performance | Sourcing | Add-ons | Setup |        |

| Tab                  | Description  |  |  |  |  |
|----------------------|--|--|--|--|--|
| Home                 | View and improve public company profile, see customers,<br>edit customer-specific company profile, and merge accounts.   |  |  |  |  |
| Profile              | Create, modify, and manage public and customer-specific profiles, and specify which remit-to addresses customers can use.  |  |  |  |  |
| Orders               | View customer purchase orders  |  |  |  |  |
| Service/Time Sheets  | View service/time sheets and related purchase order lines.   |  |  |  |  |
| ASN                  | Send advance ship notice (ASN) notifications   |  |  |  |  |
| Invoices             | Create, send, and manage invoices  |  |  |  |  |
| Catalogs             | Create and manage customer-specific catalogs.  |  |  |  |  |
| Payments             | Accept payment through digital checks from customers who use Coupa Pay.  |  |  |  |  |
| Business Performance | View order summaries and invoices, year-to-date order and invoice trends, and shipping lead time performance.  |  |  |  |  |
| Add-ons              | Access Coupa supplier add-ons, ex. Coupa Advantage, Early Payment Discounts, supplier profile update, and more.  |  |  |  |  |
| Setup                | Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fisca representatives, view, and accept the <u>Terms of Use</u> , and set up preferred early paymen discount terms. |  |  |  |  |



### Understanding the CSP homepage tiles

In this section, you will find the following:

- Improving your profile
- Accessing your profile summary •
- Viewing your Coupa Public Profile •
- CBRE and other announcements •
- Merging multiple profiles .

|  | Coupa supplier portal                |   | ANTOINETTE - NOTIFICATIONS () HELP - |   |   |                      |
|--|--------------------------------------|---|--------------------------------------|---|---|----------------------|
|  | Home Profile Orders                  | Service/Time Sheets ASN                 | Invoices Catalogs                    | Business Performance  | Sourcing Add-ons  | Setup                |
|  |                                      | Account<br>your account more visible an | d trusted by thousand                | s of customers.   |   | ••••<br>••••<br>•••• |
| Review <b>profile health</b> . To make                       | New: Exclusive discounts for you     | r business to thank you for being a p   | ity.                                 |   |   |                      |
| updates, select "Improve Your                                | Action needed: Complete your profile | e to get paid faster and get discover   | An                                   | Announcements Yew All (2)   |   |                      |
| Profile".  | Profile Progress 24% Cor             | Last Updated<br>npiete i day ago        | SI                                   | Coupa Verification (CBRE) Supplier verification on the Coupa Supplier Portal is completely optional and not required to transact with Invoice copy to Colombia General Mailbox (CBRE) |   |                      |
| View <b>legal entities, users,</b>                           | Profile Summary                      |   |                                      |   |   |                      |
| and customers belonging to<br>your business. Other data      |                                      | 1                                       | 4                                    | R   | equired to also email Invoice copy<br>olombia mailbox following Coupa   |                      |
| like banking and diversity —                                 | 1<br>Legal Entity                    | 1<br>Registered User                    | Canada                               | 1 Or  | ne-Click Savings verA   |                      |
| status are also accessible.                                  | View                                 | View                                    | Connect                              | 4   | Start saving today!<br>Explore deals for your company, exclusive to the |                      |
|  | S Banking Info S Diversity           | Early Payments S Bribery Policy         |                                      | Coupa Community.  |   |                      |
| lick the " <b>Profile"</b> link in the                       | PP Manuala                           |   | Me                                   | Merge Suggestions   |   |                      |
| Public Profile section to see a<br>preview of what customers | F5 Networks                          | Websile () http://okyspacesoldi.o       | ha<br>co                             | No merge suggestions were found. If your company<br>has multiple GSP accounts, merge them to reduce<br>confusion for your customers.<br>Request Marge<br>Latest Clustomers            |   |                      |
| see when viewing your  |                                      | About 🚔                                 | La                                   |   |   |                      |
| profile. ————  | Top Cor                              | c                                       | CERE                                 |   |   |                      |
|  |                                      |   |                                      |   |   |                      |

CBRE may communicate actions and changes through announcements. Check this regularly for any relevant information.

Option to merge data for those who have more than one account/profile in the CSP.