



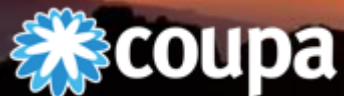
THE SHELBY GROUP

Coupa Supplier Portal:

Quick Reference Guide – For Suppliers



ODFJELL



PROCUREMENT IS A JOURNEY | WHERE ARE YOU GOING?

Overview

The background of the slide is a photograph of three people rappelling down a steep, grey rock face. They are silhouetted against a bright, cloudy sky. The person at the top is in a red shirt, the middle person is in a green shirt, and the bottom person is in a dark shirt. They are holding onto ropes and each other's hands as they descend. The overall tone is adventurous and professional.

- Get Started with the CSP
- Navigation
 - Coupa Supplier Portal (CSP)
 - Customer Invitation (Odfjell)
 - Create Your Account
 - Login to the CSP
 - Welcome Tour
 - Getting Help
 - Manage Your Account
 - Admin
 - Manage User Permissions
 - Legal Entity Set up
 - Home Screen
 - Your Public Profile
 - Purchase Orders
 - Invoices
 - Disputed Invoices
 - ASNs
 - Catalogs – Punchout/Hosted

Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Odfjell 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 Odfjell 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 Odfjell for an invitation.
- Once you accept the invitation and register, you'll be automatically connected to Odfjell.

Customer Invitation

Invitation from Odfjell

- 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.

The screenshot shows an email titled "Action Required from Coupa Customer #1 - Click Below to Join Coupa". The sender is "do_n...@...r.coupadev.com" to "SupplierAccount". The email body includes the Coupa logo, a greeting "Hello Supplier Organization," and a message explaining that Coupa Customer #1 wants to connect with the supplier. It lists benefits like viewing purchase orders, creating invoices, and receiving SMS alerts. A "Join Coupa" button is highlighted with a red box, and a "Forward This" button is also visible. At the bottom, there are links for "Overview", "Need Help?", and "Coupa Info". The footer features the Coupa logo and the text "Business Spend Management".

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 Odfjell know you're on the CSP, and give them the email address you used to register. Odfjell 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 Odfjell Supplier Enablement team and they'll do the rest.

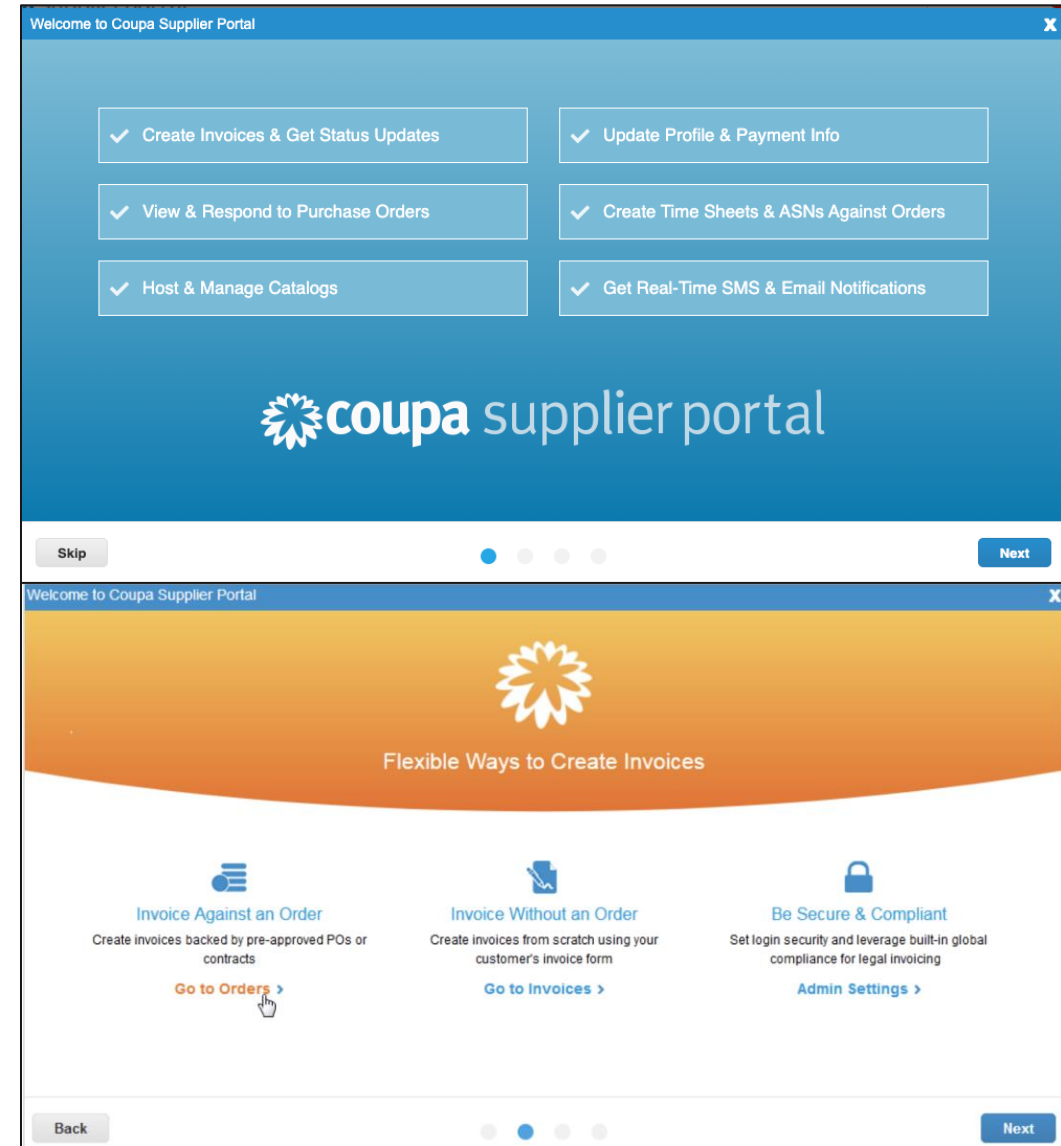
Customer-created invitation

- 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.

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

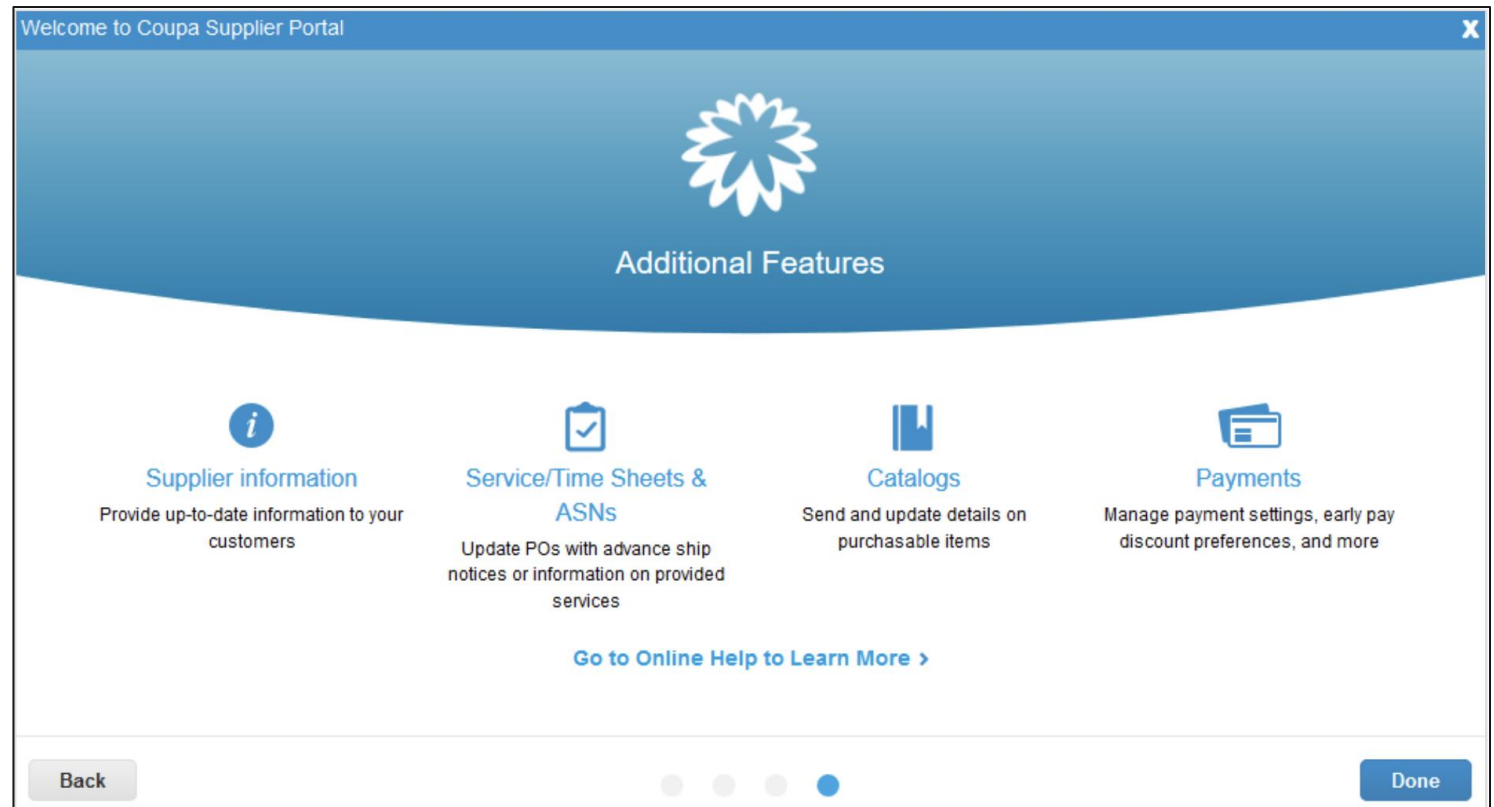
Welcome Tour

- 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.



Welcome to Coupa Supplier Portal

Additional Features

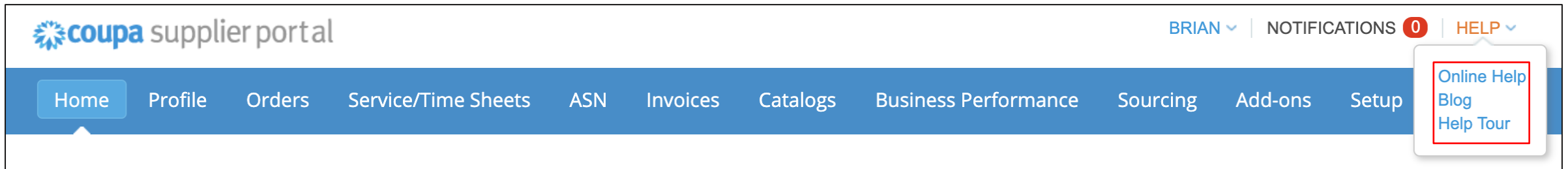
- Supplier information**
Provide up-to-date information to your customers
- Service/Time Sheets & ASNs**
Update POs with advance ship notices or information on provided services
- Catalogs**
Send and update details on purchasable items
- Payments**
Manage payment settings, early pay discount preferences, and more

[Go to Online Help to Learn More >](#)

Back ● ● ● ● Done

Getting help

- If you skipped the Welcome Tour, you could 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 Odfjell contact.



The screenshot shows the top navigation bar of the Coupa Supplier Portal. On the left is the 'coupa supplier portal' logo. On the right, it displays the user name 'BRIAN' with a dropdown arrow, 'NOTIFICATIONS' with a red circle containing the number '0', and 'HELP' with a dropdown arrow. Below this is a blue navigation bar with the following menu items: Home (highlighted with a white underline), Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. A red-bordered tooltip is open over the 'HELP' dropdown, containing the links 'Online Help', 'Blog', and 'Help Tour'.

Manage Your Account

coupa supplierportal

LUNA | NOTIFICATIONS 60

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

Setup

Account Settings
Notification Preferences
Log Out

My Account Settings

Settings
Notification Preferences
Security & Two-Factor Authentication

User Details

* First Name

* Last Name

* Email

Department

Role

Save

Change Password

* Current Password

* Password

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

* Password Confirmation

Save

com/contacts/133870/edit

- 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 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' menu item is highlighted with a red box. Below the navigation bar, the 'Admin' section is visible, with a sub-section for 'Users'. A table lists the users and their permissions.

Users	Permissions	Customer Access
TSG Testers tsgtesters@gmail.com Status: Active <input type="button" value="Edit"/>	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 displays the Coupa Supplier Portal Admin Users interface. On the left, the 'Admin Users' section lists users with an 'Edit' button highlighted in red for the user 'Luna Shelby'. A modal window titled 'User info' is open, showing fields for 'First Name' (Aijaz), 'Last Name' (Shazan), and 'Email'. Below these fields are two columns of permissions: 'Permissions' and 'Customers'. The 'Permissions' column includes checkboxes for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'All', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'All', 'Payments', 'Order Changes', 'Pay Me Now', 'Business Performance', and 'Sourcing'. The 'Customers' column includes checkboxes for 'All' and several individual customer entries.

- 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

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a 'Setup' section with 'Admin' and 'Customer Setup' options. The main content area is titled 'Admin Users' and features a table with columns for 'Users', 'Permissions', and 'Customer Access'. The 'Users' column lists two users: 'Luna Shelby' (lunashelbytest@gmail.com) and 'sunshine test' (sunshineshelbygroup1@gmail.com). The 'Legal Entity Setup' option in the left sidebar is highlighted with a red box.

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

The screenshot shows the 'Admin Legal Entity Setup' page. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a 'Setup' section with 'Admin' and 'Customer Setup' options. The main content area is titled 'Admin Legal Entity Setup' and features a table with columns for 'Legal Entity' and 'Actions'. The 'Legal Entity' column lists three entities: 'Access Real Compliant', 'Access US Compliant', and 'Access Test Supplier'. The 'Add Legal Entity' button in the top right corner is highlighted with a red box.

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 United States

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

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
2. Click Continue. 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.

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

5. 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.

6. 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	Manage

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

The screenshot displays the Coupa Supplier Portal home screen. At the top, the navigation bar includes the following tabs: Home (highlighted with a red box), Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below the navigation bar, there is a 'Setup' link. A notification banner at the top reads: 'New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.' Below this, a 'Recommended' section suggests completing the profile to get paid faster and get discovered, with a 'Learn More' link and an 'Improve Your Profile' button. The 'Profile Summary' section shows three metrics: 6 Legal Entities (View), 1 Registered User (View), and 3 Connected Customers. To the right, there are sections for 'Announcements' (View All (0)), 'One-Click Savings' (View All), and 'Merge Accounts'. The 'Merge Accounts' section states: 'Additional accounts have been found for your company. Merge these accounts to reduce confusion for your customers. Learn more'. At the bottom, there are four status indicators: Banking Info (off), Diversity (on), Accelerate (off), and Bribery Policy (off).

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 Odfjell.
- You can even communicate through the CSP to Odfjell 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. Below the navigation bar, the 'Your Profile' section is active, showing a sidebar with 'Overview', 'Profile Setup', 'Learning Center', and 'Feedback'. The main content area features a profile card for 'Brian's Accessories' with a 'Download Profile as PDF' button and links for 'Profile preview' and 'Copy profile URL'. Below this is the 'Profile Level' section, which includes a progress indicator and a list of items to be updated:

Item	Action
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

- 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 [Dropdown]

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 [Dropdown] View All [Dropdown] Search [Input]

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

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

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](#)

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

- 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 or Attachments. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or less. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

Create Invoice Create

⚙️ General Info

*** Invoice #**

*** Invoice Date** 11/17/20

Payment Term WC36-Payable in 90 days due net

*** Currency** USD

Status Draft

*** Image Scan** No file chosen

Supplier Note

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

📍 From

*** 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



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
Total	75.99

- 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 Odfjell and potentially delay payment processing

Disputed Invoices

- In the Coupa Supplier Portal (CSP), a disputed invoice is the invoice containing issues that must be resolved by the supplier and resubmitted to Odfjell for approval. Invoices with disputed status are invoices with information that Odfjell does not agree to, needs clarification on, or needs a revision or correction before it can be processed further.
- Please note that: *Odfjell* does not process disputed invoices for payment until you resolve the dispute.
- Some of the common reasons, for which an invoice can be disputed are:

Coupa Disputed Invoice Reasons	
Attachment missing or in incorrect format	Incorrect Amount or Currency
Duplicate invoice. Already paid or payment review in progress	Payment terms incorrect
Mismatch in PO & Invoice Quantity	If the Tax is added & is incorrect
One or more invoice lines unit of measure (UOM) differs from the corresponding purchase order (PO) line's UOM	This invoice does not contain a valid ODFJELL Requestor. Please reach out to your ODFJELL contact for the proper Requestor
The supporting documentation doesn't cover all the required details	Invalid or missing PO number

[Useful Link: Coupa Success – View and Manage an Invoice](#)

Disputed Invoices

When the status of an invoice changes to "Disputed", you receive an email notification with:




- Invoice number
- Date of the dispute
- Reason for the dispute
- Optionally Odfjell can leave any additional comments on the bottom on the invoice page.


In the Invoices table, click on the invoice number or on the Resolve button in the Actions column for the disputed invoice that you want to resolve.

Create Invoices i

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

Export to ▼ View All ▼ Search 🔍

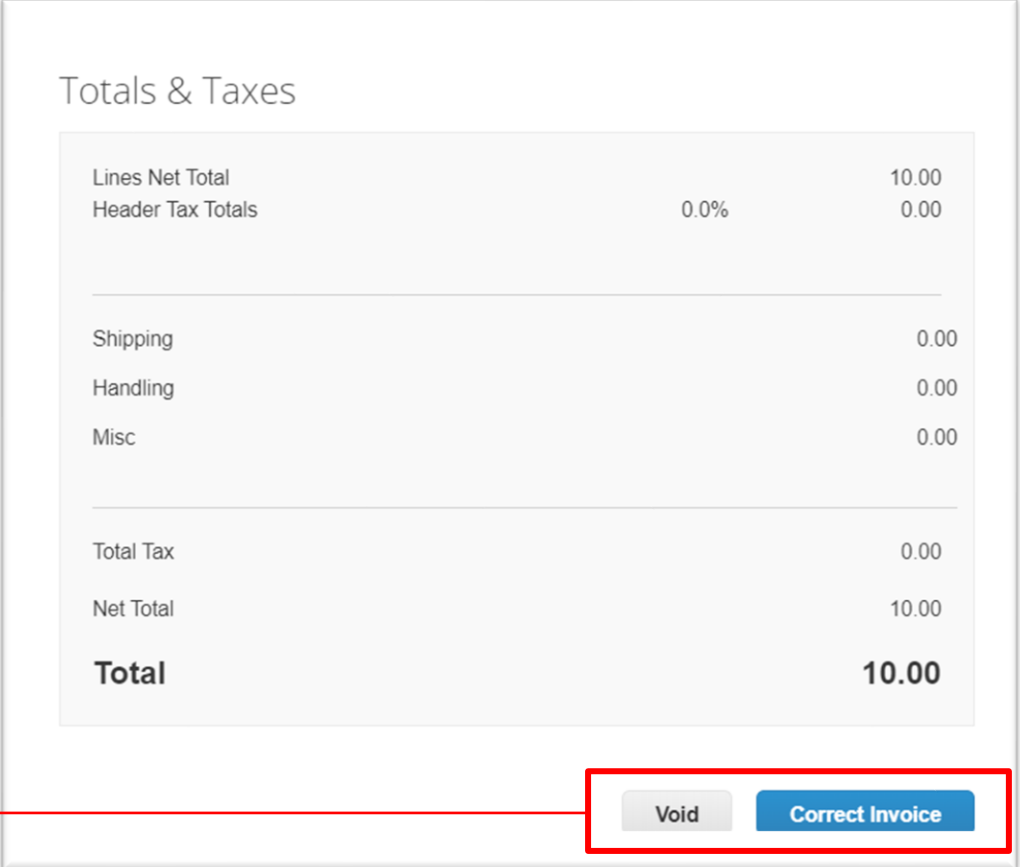
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TEST120720	12/07/20	Approved	None	1,000.00 USD	No		
None	12/04/20	Draft	None	0.00 USD	No		 
BAD-INV-2	12/04/20	Disputed	None	40.00 USD	Yes	Master Item Description Issue	
GOOD-INV-1	12/04/20	Pending Approval	None	40.00 USD	No		
UPS-BBB-2	12/04/20	Approved	None	150.00 USD	No		

 [Resolve](#)

Disputed Invoices – Resolution Process

To resolve a dispute, click on the relevant button at the bottom of the invoice.

- **Void:** Disputed invoices will also give suppliers the option to Cancel or Adjust the invoice. If an invoice was issued in duplicate or has already been paid for through an earlier invoice, select **Void**.
- **Correct Invoice:** If an invoice has some incorrect information, correct it. This option allows you to completely edit, add attachments and make any adjustments to address the supplier's concern.
- Should you choose to **Correct Invoice**, please follow the process in the next slides.



Totals & Taxes

Lines Net Total		10.00
Header Tax Totals	0.0%	0.00
<hr/>		
Shipping		0.00
Handling		0.00
Misc		0.00
<hr/>		
Total Tax		0.00
Net Total		10.00
Total		10.00

Void Correct Invoice

A red box highlights the 'Void' and 'Correct Invoice' buttons at the bottom right of the screenshot. A red arrow points from the 'Void' button to the first bullet point in the text above.

Disputed Invoices – Correcting a Disputed Invoice

- Suppliers can also make necessary changes to the **Total & Taxes** section such as adding shipping charges and applying approved taxes.
- Click **Calculate** below the Total & Taxes section to lock in the changes and to update the invoice total, then click **Submit**.
- A message box will appear, click **Send Invoice** to continue.

Totals & Taxes

Lines Net Total	8,400.00
Shipping	<input type="text"/>

Tax

+

Total Tax

Net Total

Total

Buttons: Delete, Cancel, Save as Draft, Calculate, **Submit**

Are You Ready to Send?

You're about to send an invoice to **Odfjell** for a total amount of **10.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Buttons: Continue Editing, **Send Invoice**

Disputed Invoice (Resolved) - Invoice Status

- The green bar of success should appear at the top of the [Invoices](#) screen.
- Suppliers will see that the original disputed invoice will have a [Voided](#) status and the corrected invoice will have the same invoice number with a [Processing](#) status.

The screenshot shows the 'Invoices' screen with a green success message at the top: 'P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS invoice #AC-DM-021021 is pending approval'. Below this is the 'Instructions From Customer' section, followed by 'Create Invoices' buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below shows invoice details with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Dispute Reason. Two rows are highlighted with a red box: one with status 'Processing' and one with status 'Voided' and reason 'Invoice date inaccurate'.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason
3616	05/12/22	Processing	None	10.00	No	
3616	05/12/22	Voided	None	10.00	Yes	Invoice date inaccurate

After you submit your Coupa invoices, invoices will be routed to the AP Team for review and approval. During this time, all invoices are visible just for Odfjell's AP team. If the Invoice Dispute has been correctly resolved, it will follow our regular process for approval and payment.

ASNs

- Advanced Ship Notifications (ASN) are for alerting Odfjell that the order has been shipped

Total	Assigned To	Actions
40.00		
20.00		Flip to ASN

- From the Orders tab in the CSP, there is a new icon to **Flip to ASN**
- When you do, the entry screen will open and you can then (1) assign the ASN#, (2) fill in shipping info, and (3) adjust quantity if needed.
- When done, click Submit

Configure PO Delivery

Create Advance Ship Notice

1 **General Info**

ASN #

Status draft

Ship Date

Delivery Date

Ship To

Address 150 South Perry Street
Montgomery, AL 36104
United States
Location Code: AL0001

2 **Shipping Info**

Tracking Number

Carrier

Shipping Method

Ship Note

3 **Lines**

1	Description	Quantity	UOM	Received Quantity	Status
	PopTart Pie	<input type="text" value="2.00"/>	Each	0	draft

Supplier Part Num	PO #	PO Line	Po Line Quantity
None	nT000455	1	2.0
Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty

Comments

[Cancel](#) [Save](#) [Submit](#)

Catalogs

There are two types of catalogs you can set up under the Catalog tab.

1. Punchout Catalogs
2. Hosted Catalogs

coupa supplier portal

TABITHA | NOTIFICATIONS 4 | HELP

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

Setup

Select Customer

1. **Configure Punchout**

Catalogs

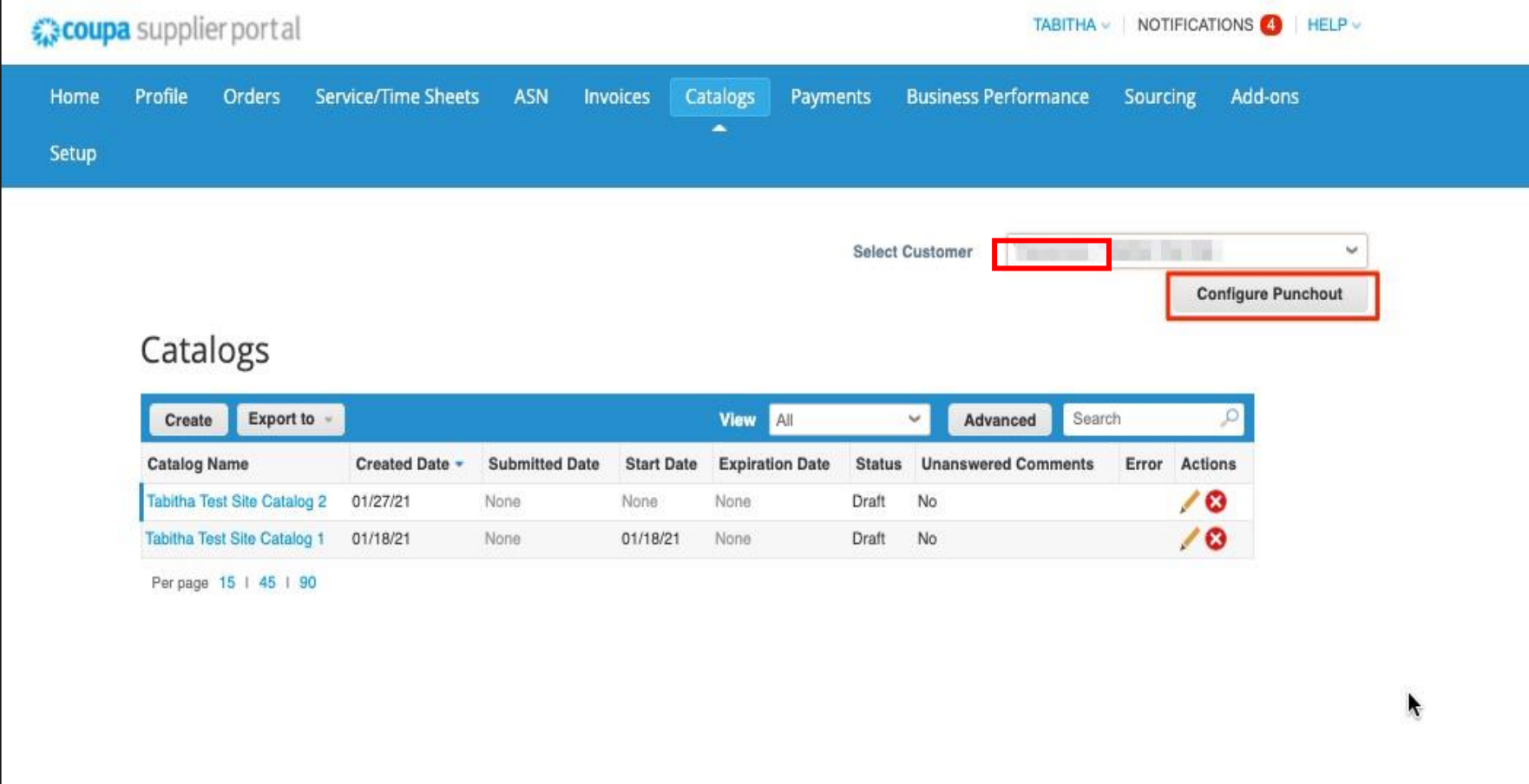
2. **Create** Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Tabitha Test Site Catalog 2	01/27/21	None	None	None	Draft	No		
Tabitha Test Site Catalog 1	01/18/21	None	01/18/21	None	Draft	No		

Per page 15 | 45 | 90

Catalog - Punchout

- Make sure to select the correct client first.
- Click on Configure Punchout from the Catalog tab.



The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as TABITHA with 4 notifications. The navigation menu includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs (selected), Payments, Business Performance, Sourcing, and Add-ons. Below the navigation, there is a 'Setup' section with a 'Select Customer' dropdown menu and a 'Configure Punchout' button, both highlighted with red boxes. The main content area is titled 'Catalogs' and features a table with columns for Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. Two catalogs are listed: 'Tabitha Test Site Catalog 2' and 'Tabitha Test Site Catalog 1', both in Draft status. The 'Configure Punchout' button is located to the right of the 'Select Customer' dropdown.

coupa supplier portal

TABITHA | NOTIFICATIONS 4 | HELP

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

Setup

Select Customer [dropdown] **Configure Punchout**

Catalogs

Create Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Tabitha Test Site Catalog 2	01/27/21	None	None	None	Draft	No		
Tabitha Test Site Catalog 1	01/18/21	None	01/18/21	None	Draft	No		

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Catalog – Punchout (cont.)

Enter in your punchout credentials and fill all the fields in. Once complete, click on the OK button.

If the catalog was uploaded correctly. You will then be taken back to the catalog screen and a green ribbon will pop up stating you have successfully loaded your catalog.

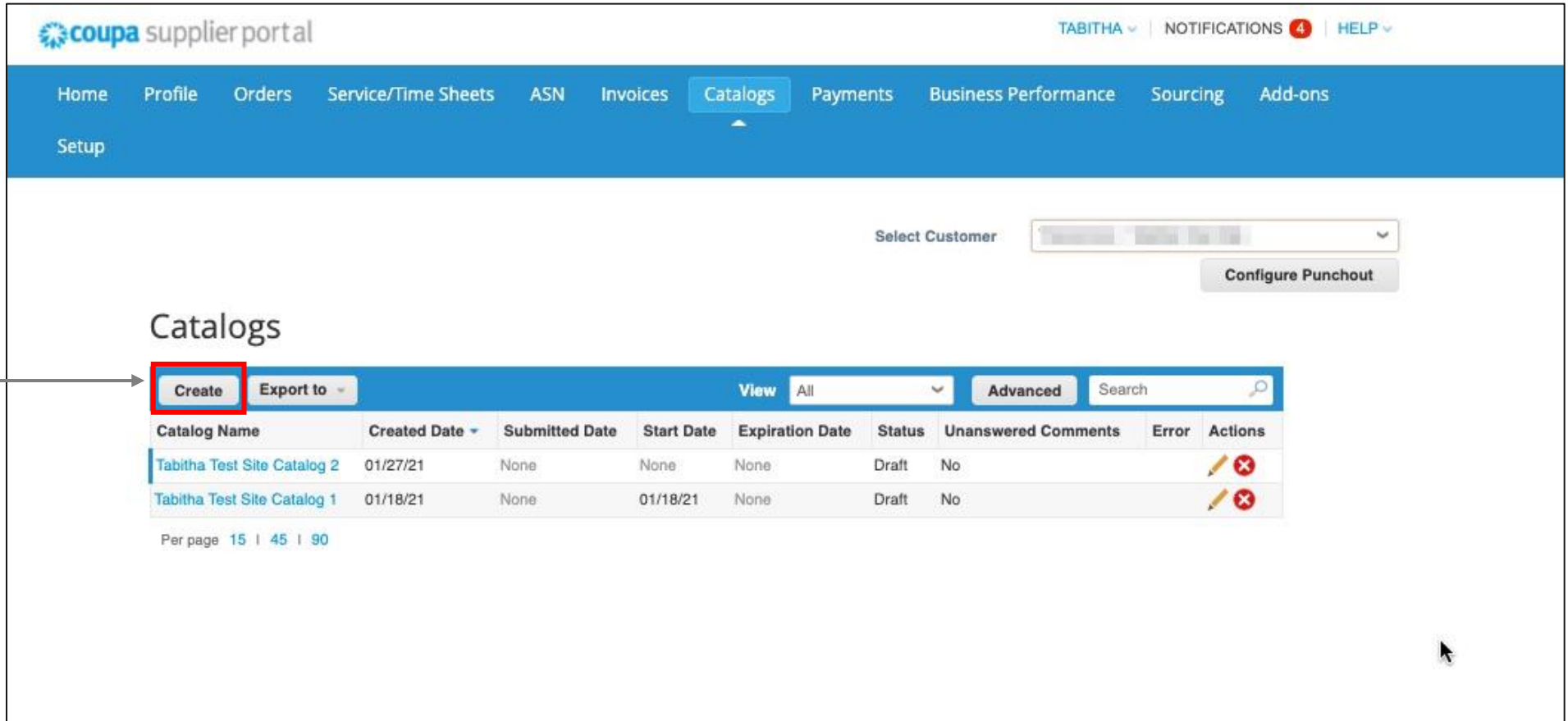
Configure Punch Out for ✕

If your website supports it, you can configure punchout for your Coupa customers here.





- * Name
- * URL
- * Buyer Identity
- * Buyer Domain
- * Supplier Identity
- * Supplier Domain
- * Shared Secret
- * Protocol

Catalogs – Hosted Catalog

For a Hosted catalog click on the create button on the catalog screen



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs (highlighted), Payments, Business Performance, Sourcing, and Add-ons. Below the navigation bar, there is a 'Select Customer' dropdown menu and a 'Configure Punchout' button. The main content area is titled 'Catalogs' and features a table with columns for Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. The 'Create' button is highlighted with a red box. The table contains two rows of catalog data.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Tabitha Test Site Catalog 2	01/27/21	None	None	None	Draft	No		 
Tabitha Test Site Catalog 1	01/18/21	None	01/18/21	None	Draft	No		 

Per page 15 | 45 | 90

Catalog – Hosted Catalog (cont.)

Select the correct customer to upload catalog to

Select Customer

Configure Punchout


Tabitha Test Site Catalog 3 [Edit](#)


[Back](#)

Customer

* Catalog Name

Status **Draft**

Start Date  date when catalog prices become effective

Expiration Date  date when catalog prices become expired

Currency **USD** 

Make sure to name your catalog

Add a start or end date if prices will be changing

- After you have completed the above, you will scroll down on the page to the next section

Catalog – Hosted Catalog (cont.)

- Click on Load from File to be able to get the CSV template as well as to be able to upload the catalog.

Items Included in Catalog

Items Included in Catalog

Buttons: Create, **Load from file**, Export to, View All, Advanced, Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
------	-------------	---------------	-------	--------------	----------	----------------------	---------

Select Customer: [Dropdown]

Configure Punchout

Bulk Load Item Updates for Tabitha Test Site Catalog 4

Follow these steps to upload items

1. Download the CSV template, or **export** the current list (Based on the CSV File Field Separator in your Language and Region settings.)

1. **Download** or **Export To**

2. Fill in or update the CSV file. [Click here](#) for a description of the required and optional fields in the template.

- Fields marked with a "*" are mandatory.
- Each row uploaded will create a new item.
- Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.

3. Load the updated file

2. **Choose File** No file chosen

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

3. **Start Upload**

- Click on Download to obtain the CSV file
- Once the file has been updated, this is where you will load the file at.
- Last step – after the file is loaded click on Start Upload

A scenic landscape at sunset. The foreground is filled with tall, green grasses. In the middle ground, there are rolling hills and mountains. The sun is setting behind a mountain range, creating a warm, golden glow. The sky is filled with soft, colorful clouds.

QUESTIONS?

**Please Email
otussupplierenablement@odfjell.com**