Coupa Supplier Portal (CSP): NCA Purchase (Construction)

August 2025

Please note: This process is designed for construction projects ONLY. All other purchases should follow regular Coupa procedures.

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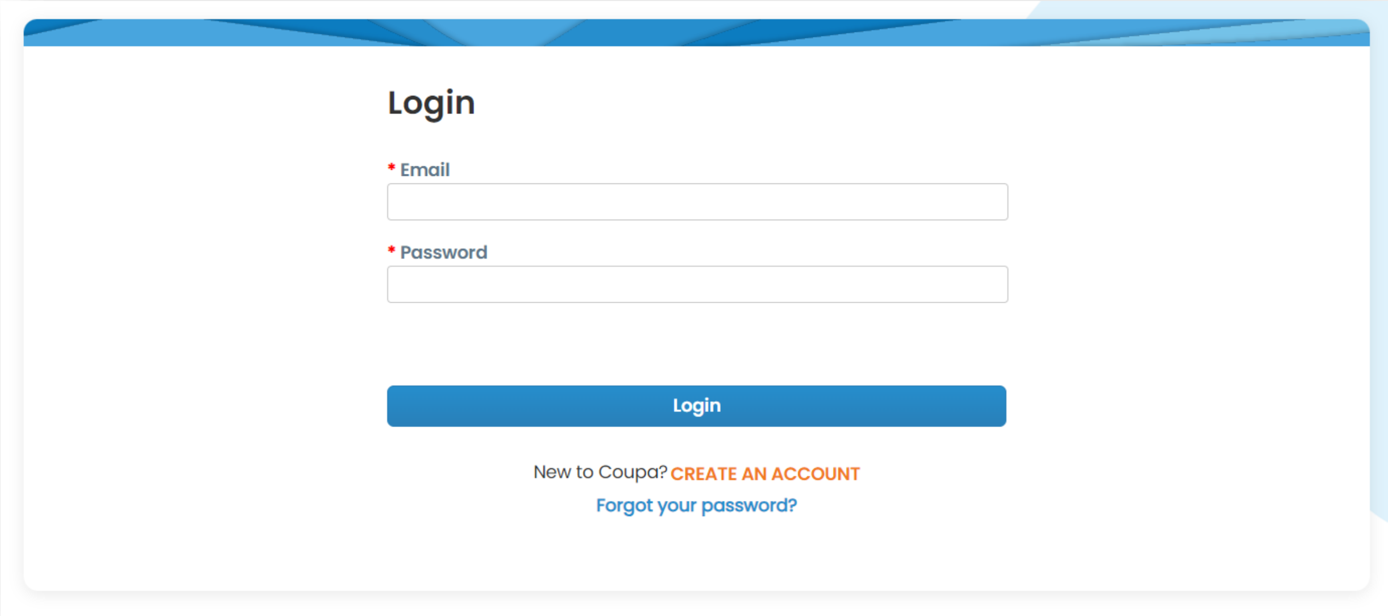
CSP Login

- Log into the Coupa Supplier Portal (CSP) at: https://supplier.coupahost.com/ using the previously established email address and password.

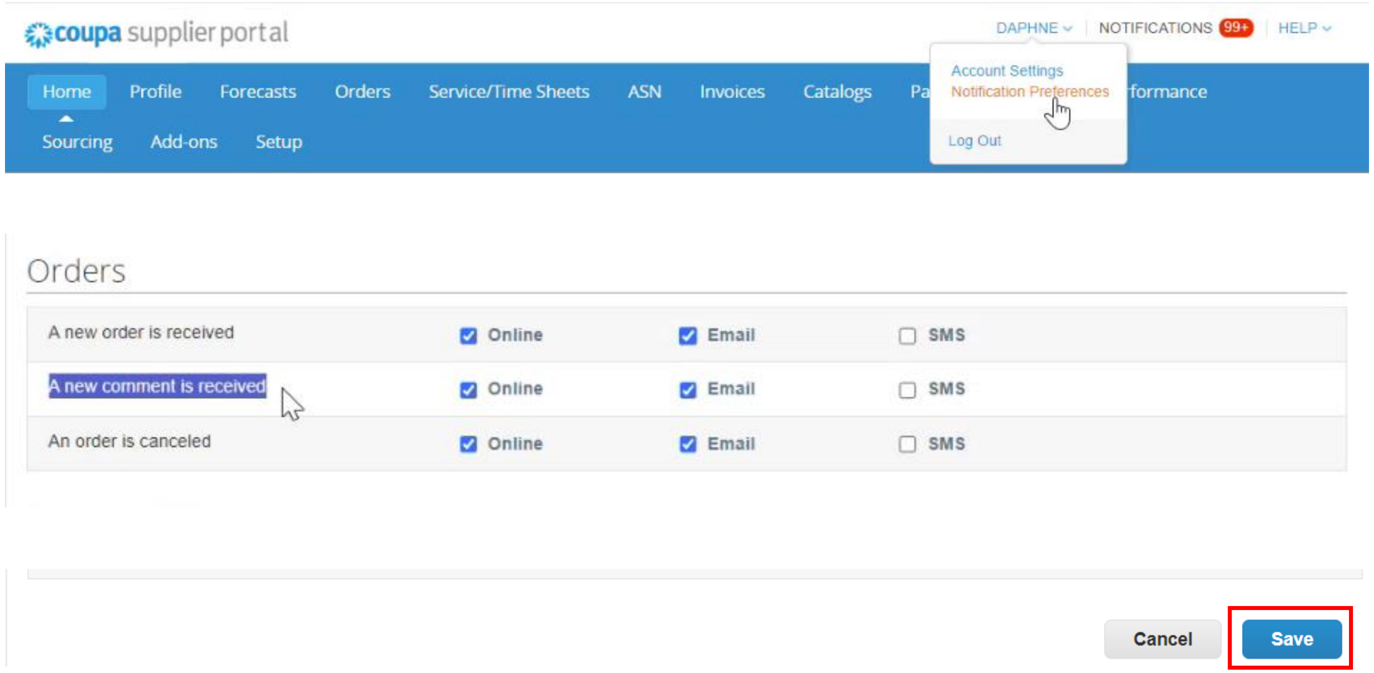
- For best results, Google Chrome is the recommended web browser.

- Upon Login, ensure UPS is the customer.



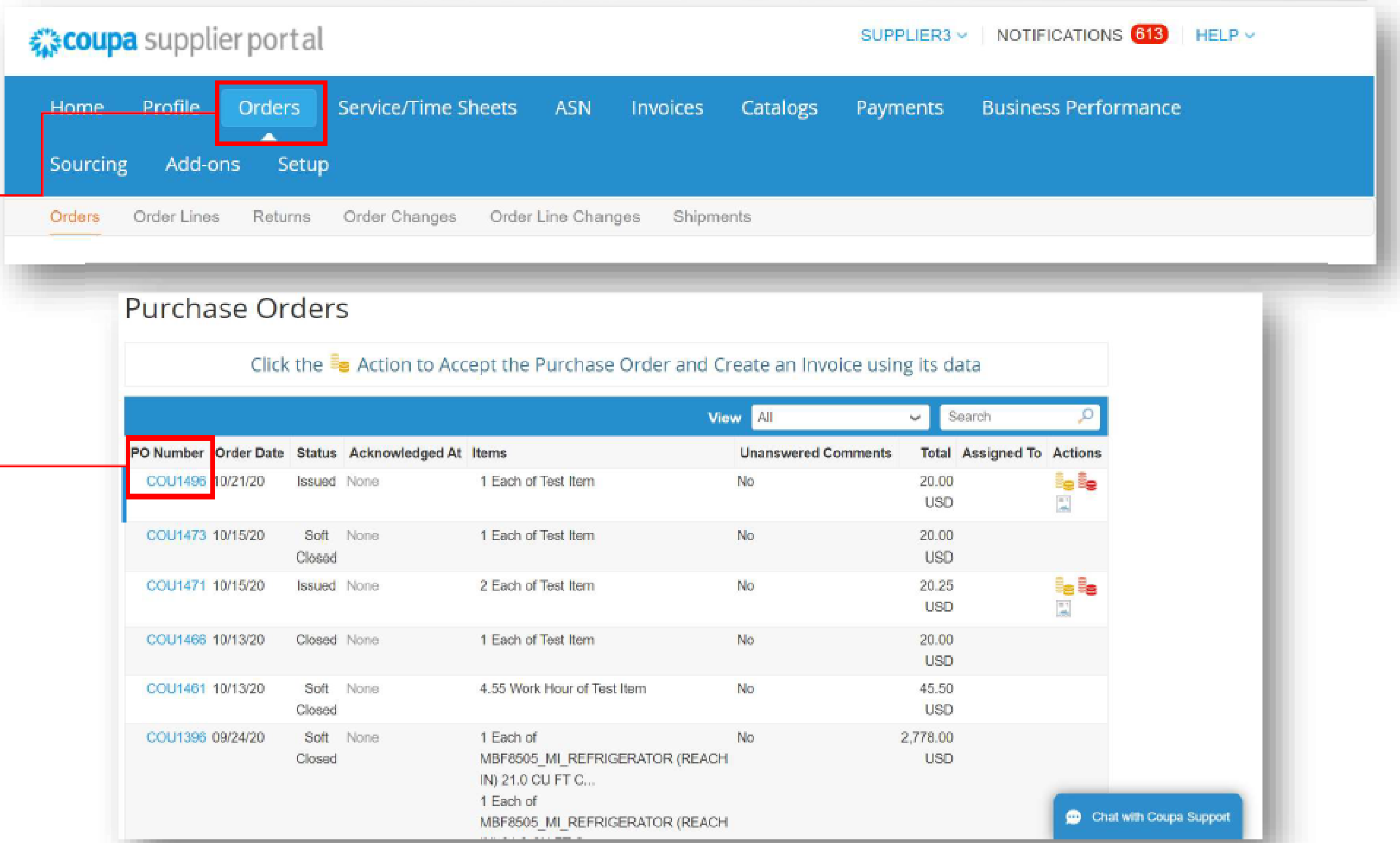
Notifications Setup

- NCA Purchase Orders will be delivered via Coupa and changes occur often, so proper notification setup is important.
- In the upper left corner of the Coupa Supplier Portal, hover over your name and click **Notification Preferences** in the dropdown.
- Scroll to the **Orders** section and enable each preferred method – online, email, and/or SMS (text) - for the **"A new comment is received"** notification.
- Scroll to the bottom of the page and click the **Save** button to update your preferences.

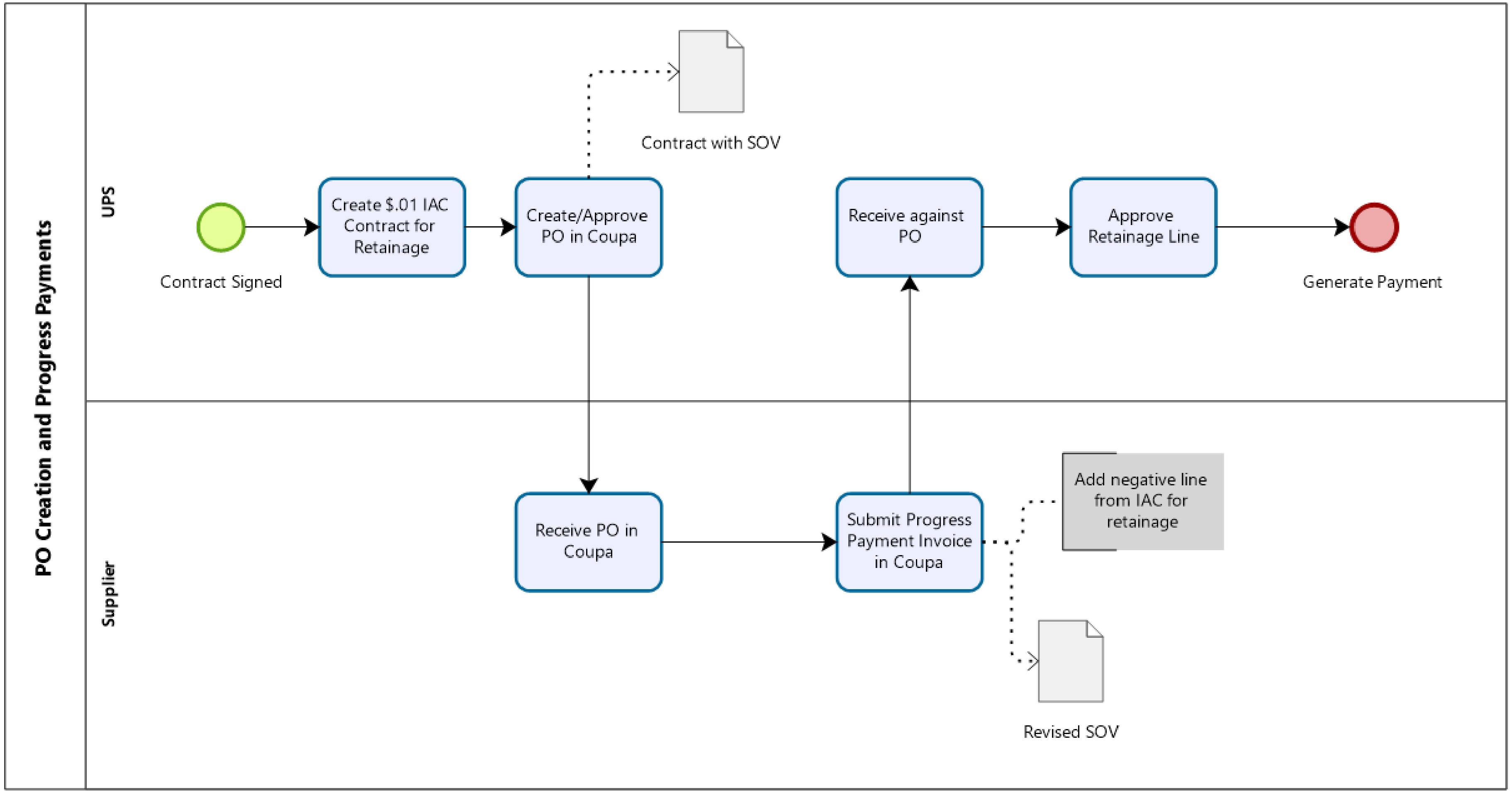


Viewing POs

- Click the *Orders* tab on the navigation bar.
- On the *Purchase Orders* screen, locate the PO from which the invoice is to be created.
- Click the blue number in the *PO Number* column to open the purchase order.



Invoicing

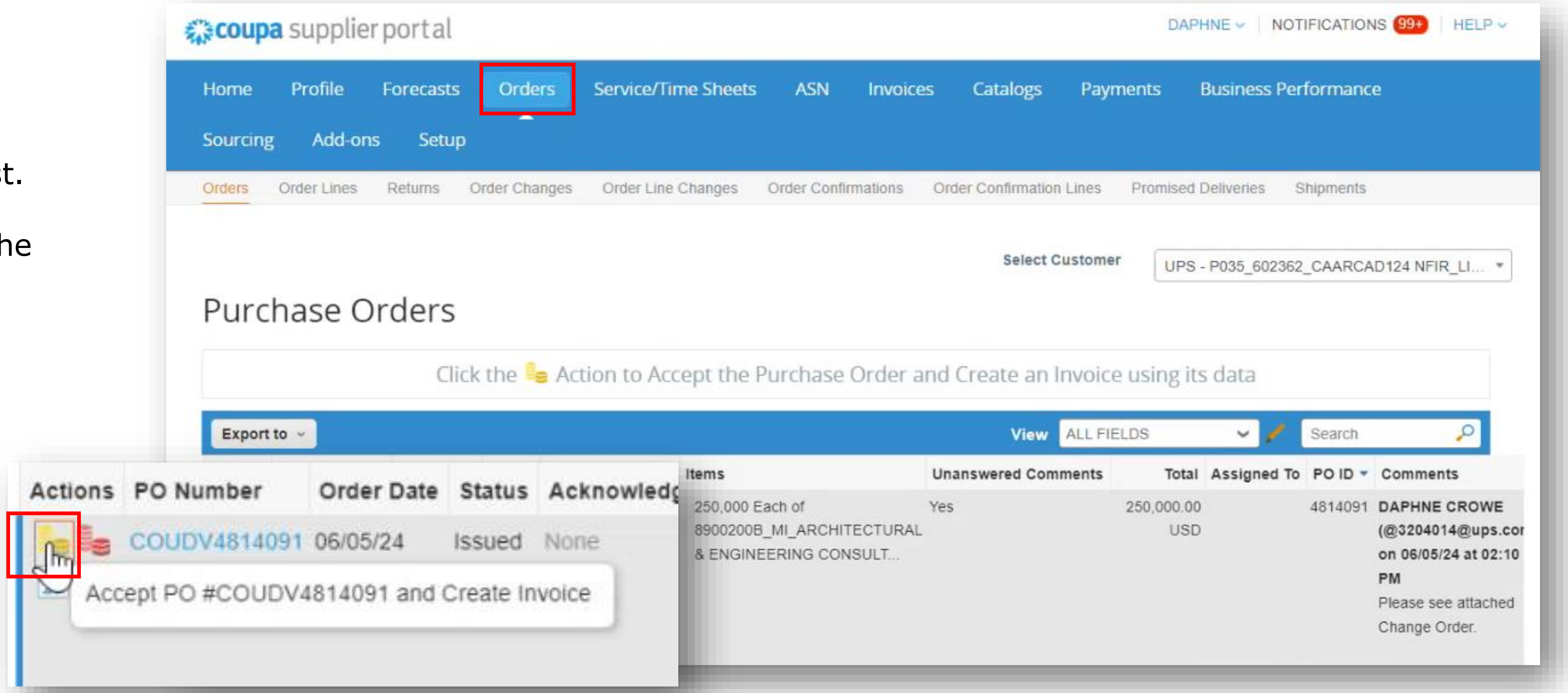

PO Creation and Progress Payments
UPS
Supplier
Contract Signed
Create $.01 IAC Contract for Retainage
Create/Approve PO in Coupa
Contract with SOV
Receive against PO
Approve Retainage Line
Generate Payment
Receive PO in Coupa
Submit Progress Payment Invoice in Coupa
Add negative line from IAC for retainage
Revised SOV

Invoicing

STEP 1 Click the **Orders** tab.

STEP 2 Locate the correct purchase order in the **Purchase Orders** list.

In the **Actions** column, click on the **gold coins** to create an invoice.



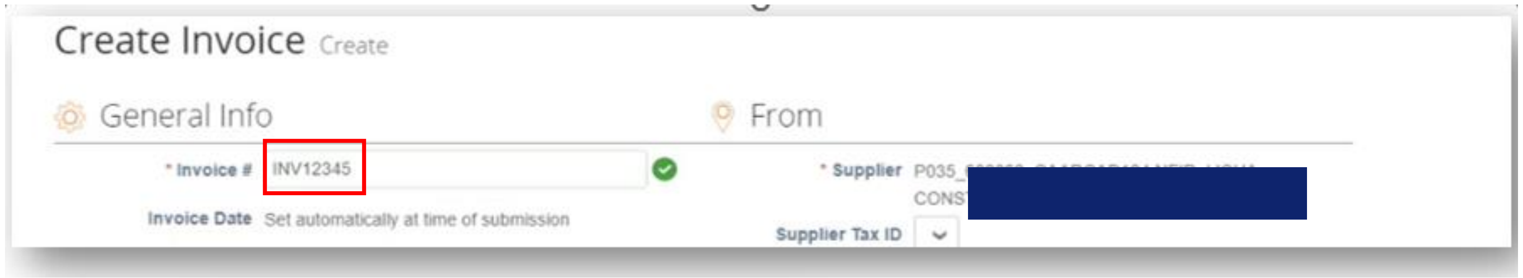
Invoicing

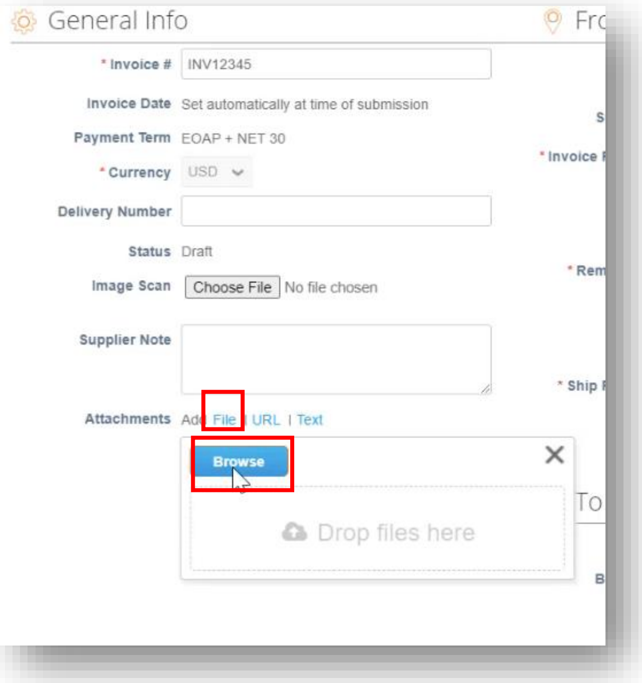
STEP 3 Enter a **unique invoice number** in the **Invoice #** field (the green check indicates success).

STEP 4 In the Click the **Attachments** field, click on **File.**

STEP 5 Click the **Browse** button to locate the Schedule of Values on your computer. Once located and selected, click Open OR drag and drop the file into the **Attachments** field.

When attached successfully, the name of the document will appear as a clickable link in the **Attachments** field.





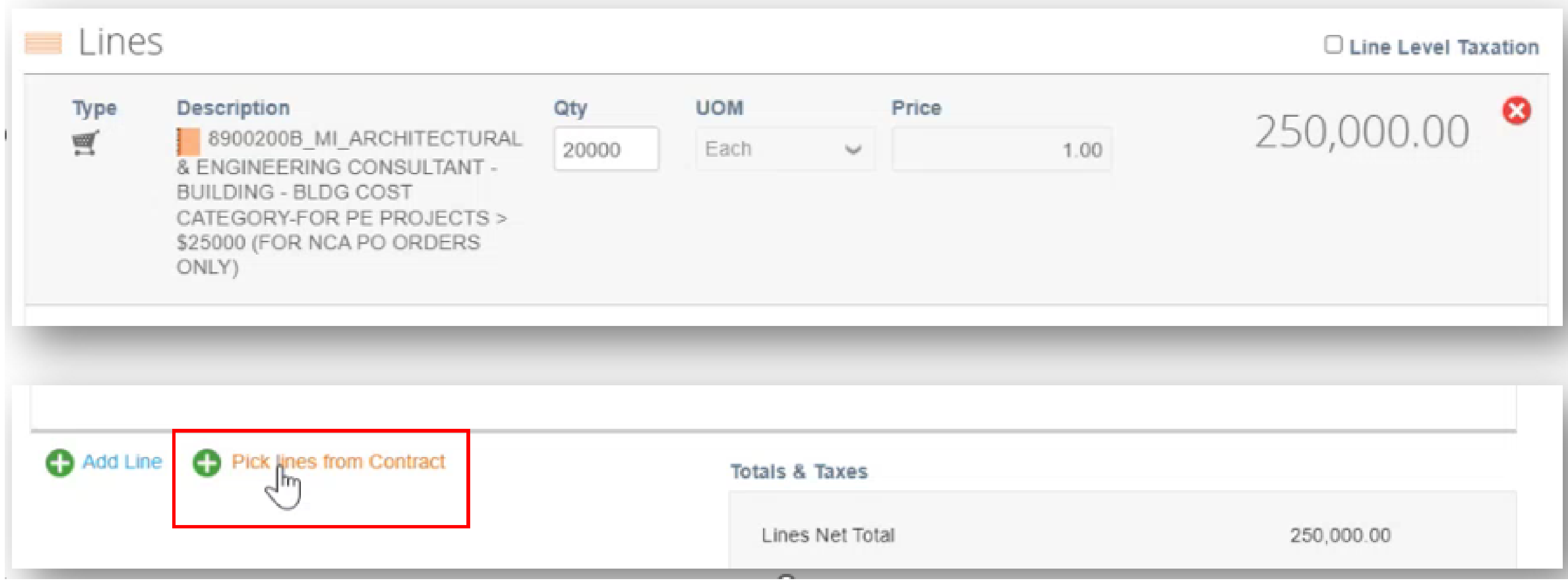
Invoicing

STEP 6 Scroll down to the **Lines** section and enter the amount to be invoiced in the **Qty** field for each applicable line item.

Delete any lines not being used by clicking on the red X.

STEP 7 If no retainage is being added to the invoice, skip to Step 12.

To add a retainage credit line, click the **Pick lines from Contract** button below the applicable invoice line.

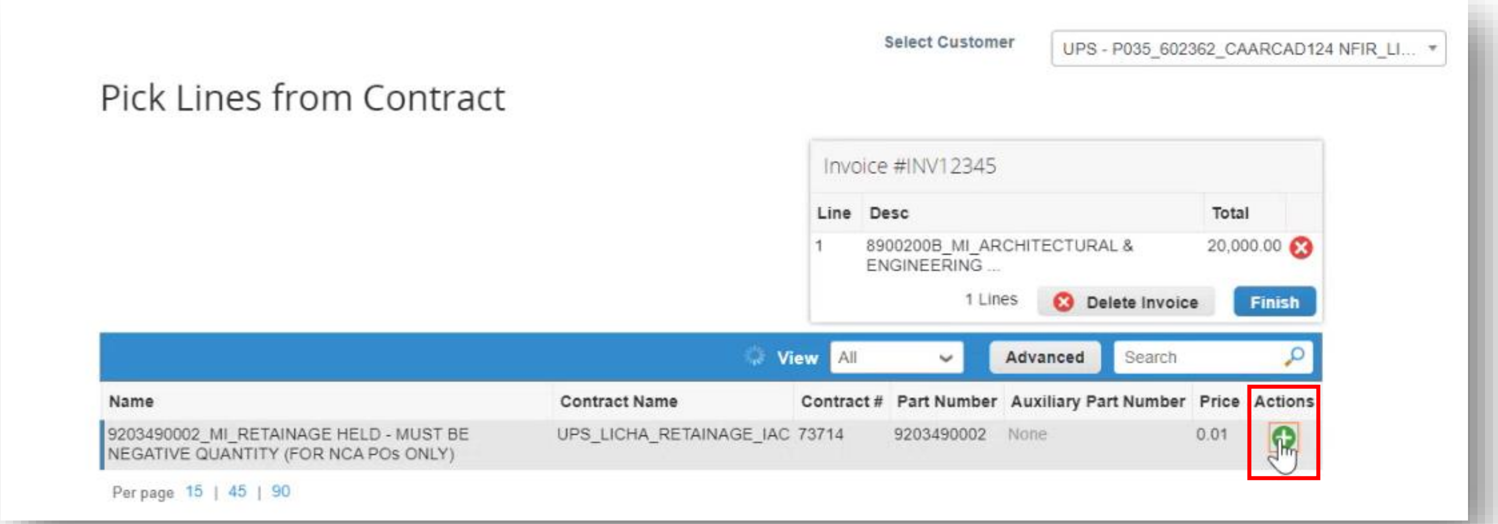


Note: Retainage rates (5 to 10 percent) are reflected in the contract with UPS.

Invoicing

STEP 8 In the **Actions** column, click on the **green plus** button.

STEP 9 Once added, click the **Finish** button to return to the invoice.

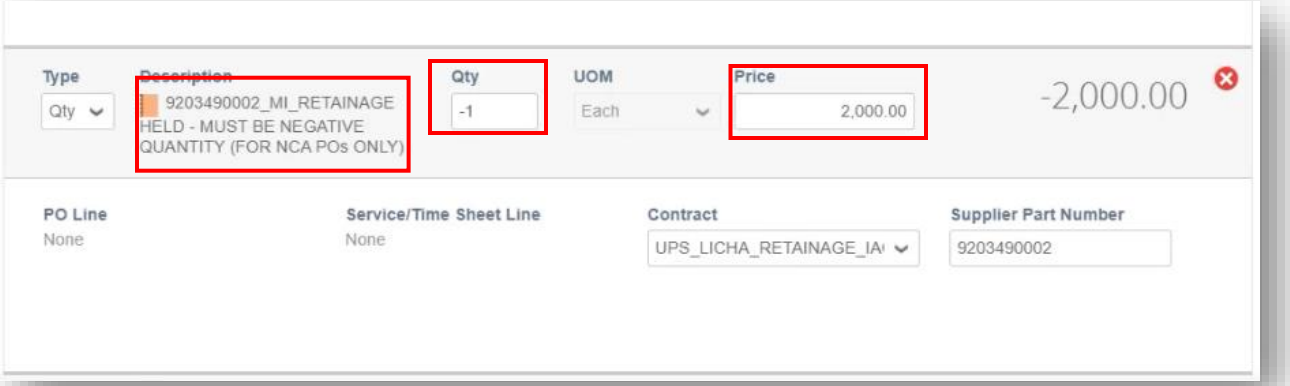


Invoicing

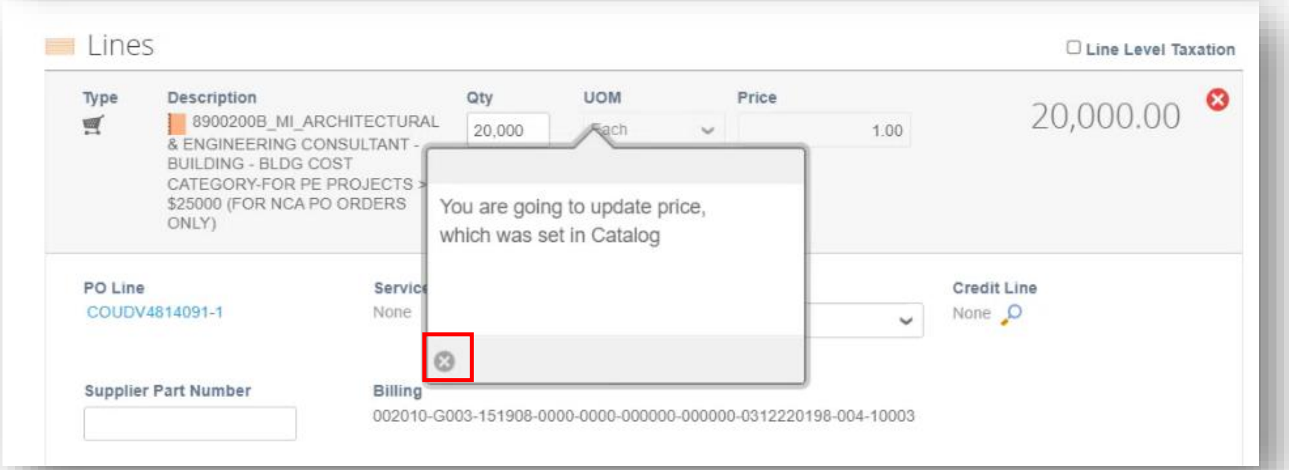
STEP 10 In RETAINAGE line, enter -1 in the **Qty** field.

In the **Price** field, enter the calculated retainage amount for the invoice lines that require retainage.

Ensure the **Price** field is a <u>positive</u> number.



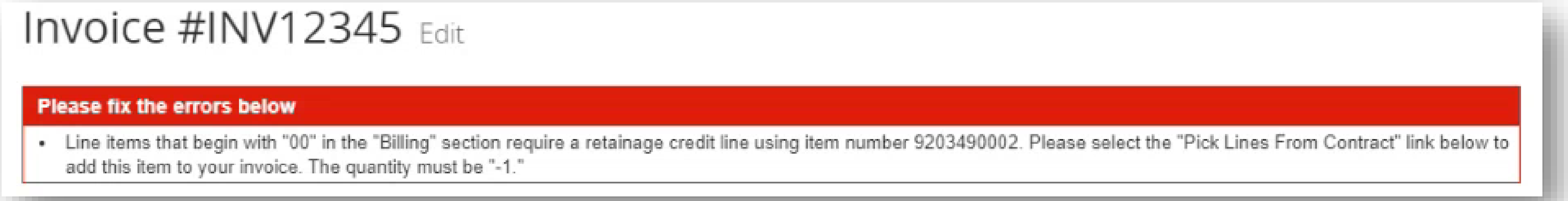
STEP 11 The popup window can be ignored and closed by clicking the **X** in the lower left corner.



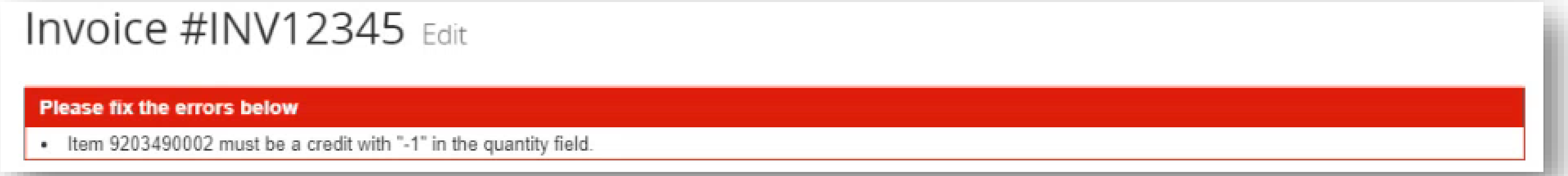
Invoicing – Retainage Message Errors

<u>Note</u>:

- Submission of line items that require a retainage credit without the proper retainage credit lines will generate the following error message:



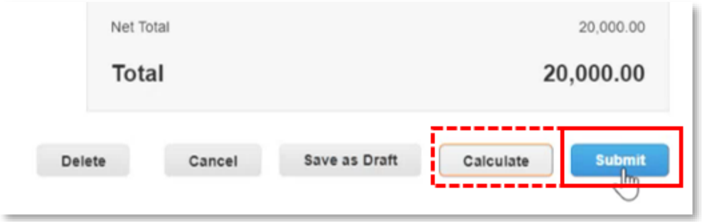
- Entering one (1) instead of negative one (-1) in the quantity field of a retainage credit line will generate the following error message:



Invoicing

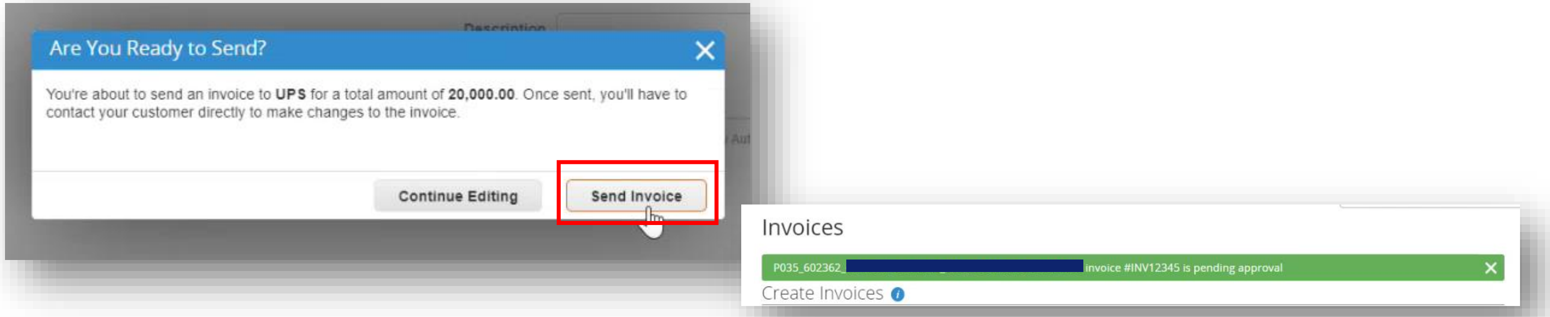
STEP 12 Scroll down below the **Taxes & Totals** section of the invoice and click **Submit**.

Note: If the correct number does not appear in the **Total**, click **Calculate** to update.

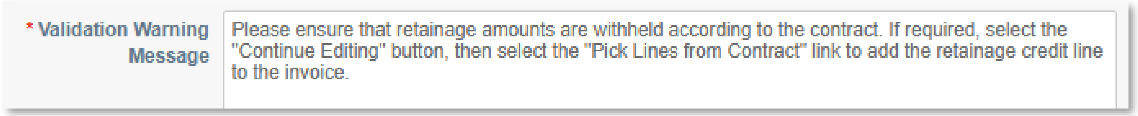


STEP 13 On the popup window, click **Send Invoice**.

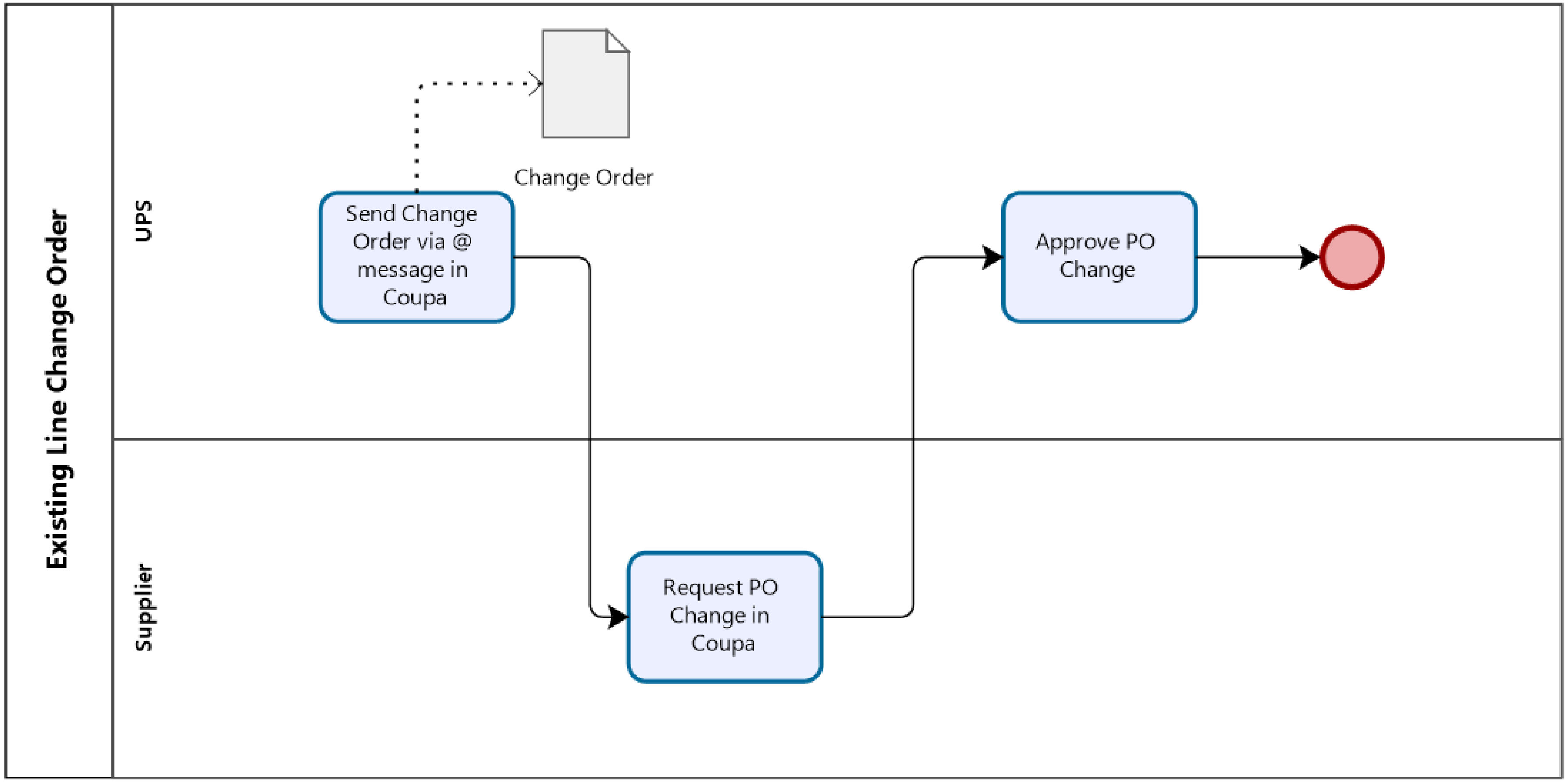
Back on the **Invoices** screen, the green banner of success will appear when submission is complete.



Note: For invoices that do NOT include a retainage message, a submission message will appear. Please ignore this message.



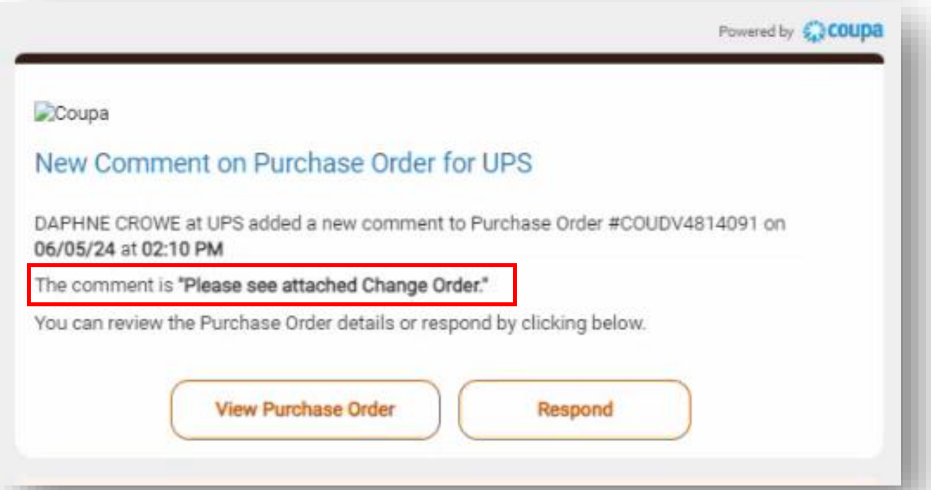
Existing Line Change Orders



Existing Line Change Orders

- Change Orders will be received as Comments with the CO attached.
- Comments should be **reviewed as soon as possible** as they require specific action.

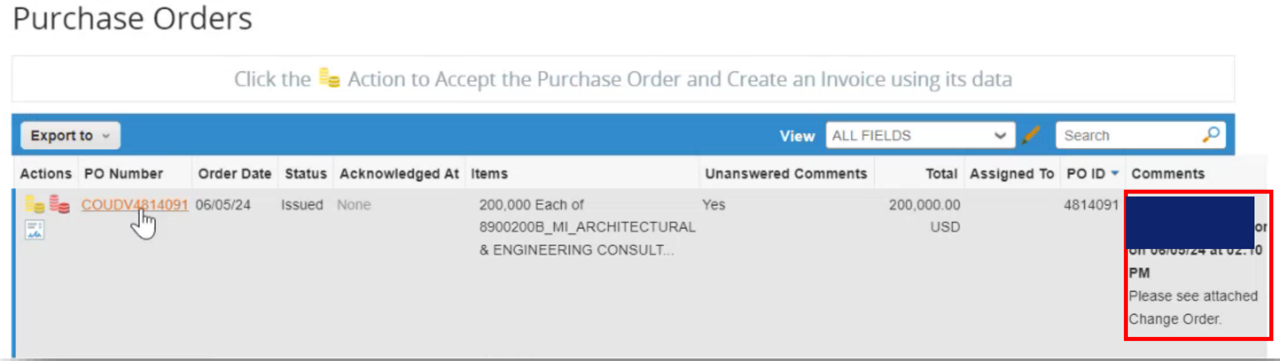
STEP 1 Access the comment from **My Notifications** page or email.

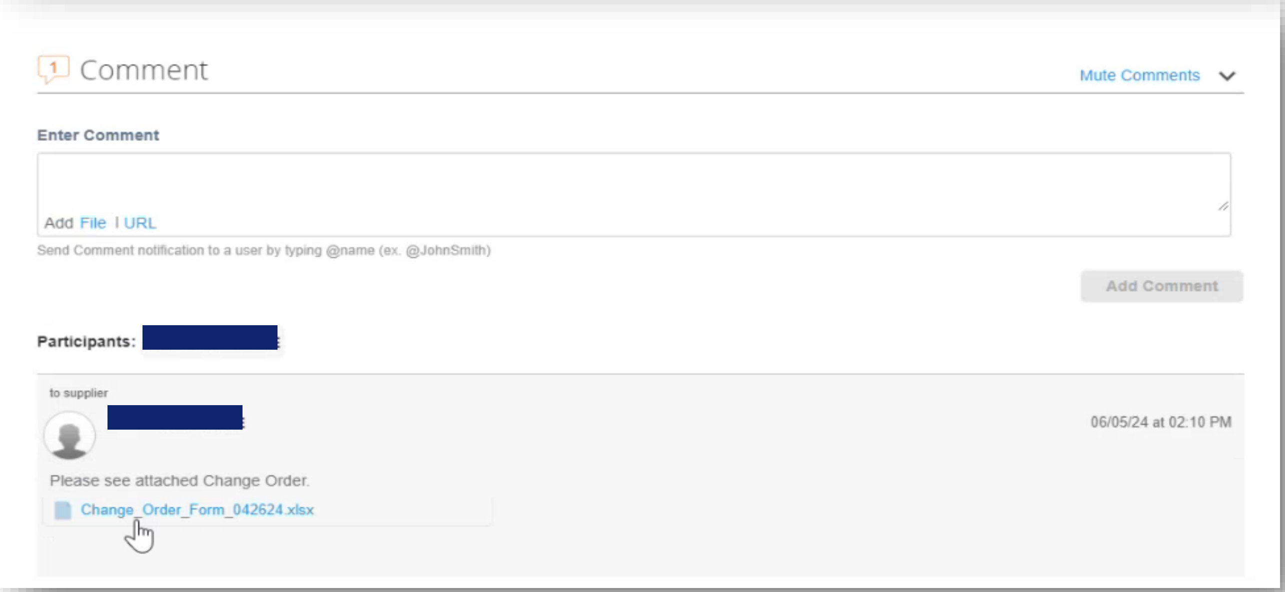


Existing Line Change Orders

STEP 2 From the **Orders** screen, in the **PO Number** column, click on the Purchase Order.

STEP 3 Scroll down to the **Comment** section and locate the most recent comment. Click the **Change Order Form** attachment and download the form.





Existing Line Change Orders

STEP 4 Review the Change Order Form to view the specifics of the change.

Ensure you agree with the **Description of Work to be Performed**.

NCA PO CHANGE ORDER

Date: Test **Change Order No.:**

PO Number: 0 **Oasis Ship To Location** 0

RFA/Project Number: 0 **Oasis Charge To Location:** 0

Project Owner Name: 0 **Supplier Name:** 0

Project Owner ADID: 0

Item Name	Item Number	Task	Initial Cost	Additional Cost	Total Cost	Description of Work to be Performed:
8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY-FOR PE PROJECTS > $25000	8900200B	002	$ 200,000.00	$ 50,000.00	$ 250,000.00	Detailed description of work here
	#N/A	#N/A			$ -	

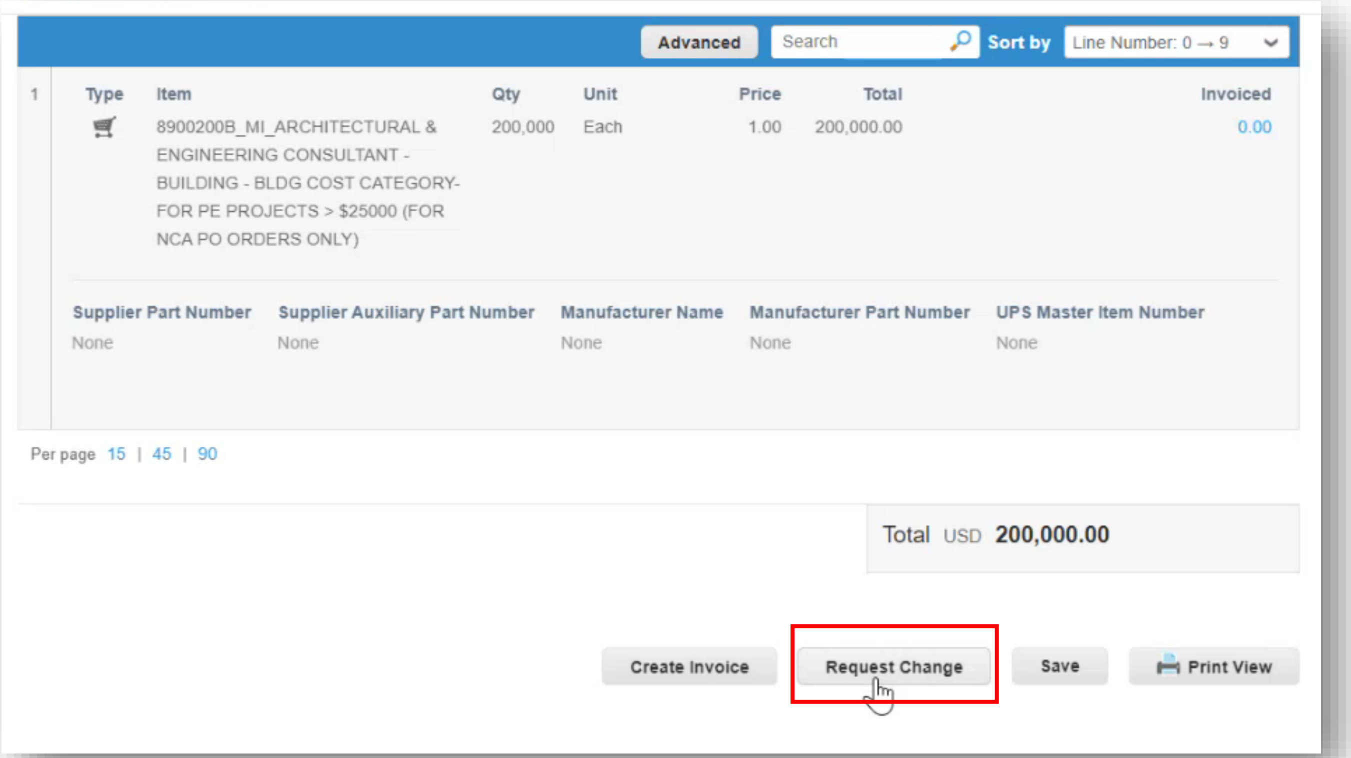
Existing Line Change Orders

STEP 5 Below the total on the PO, click the **Request Change** button.

Note: The price of the line items on an NCA PO will be set at $1.00.

The quantity (Qty) will be set to the agreed-upon total of the specific line item.

(in this example: 200,000 units, priced at $1.00 each, for a total of $200,000). Also notice that this line item has not been invoiced against.



Existing Line Change Orders

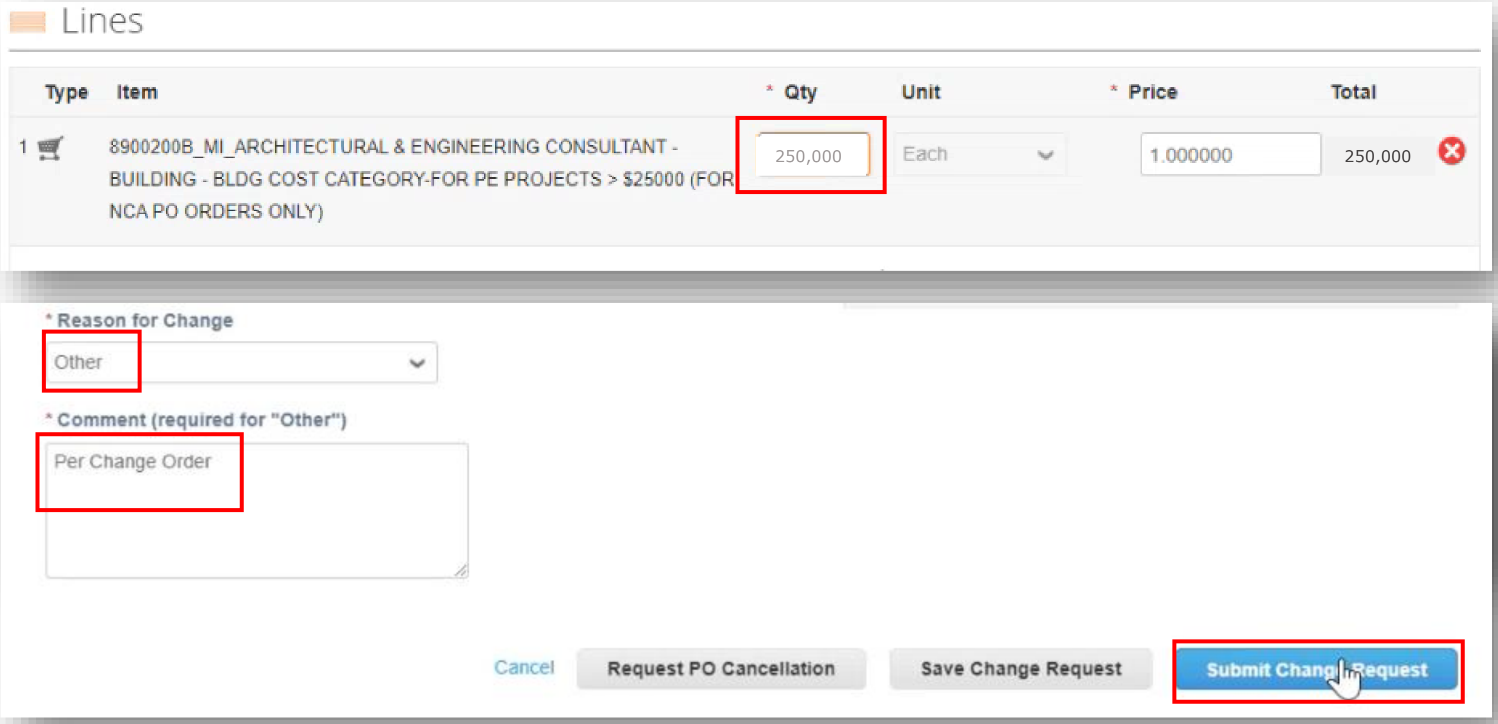
STEP 6 Update the number in the quantity (**Qty**) field to reflect the new item amount (in this example, from 200,000 to 250,000).

STEP 7 Scroll down and select **Other** from the **Reason for Change.**

In the **Comment (required for "Other")** section, enter:
Per Change Order [#]

STEP 8 Click the **Submit Change Request** button.

The line item and purchase order totals will be updated accordingly.



Viewing PO Change Orders

STEP 1 Click on **Orders**.

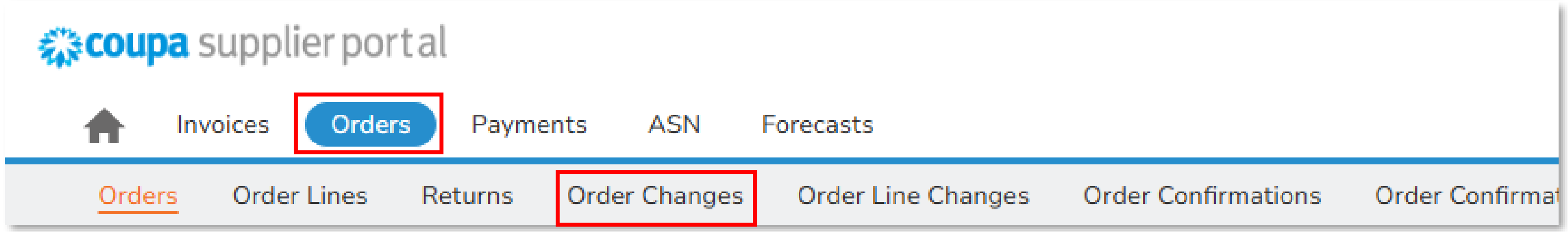
STEP 2 Click on **Order Changes.**

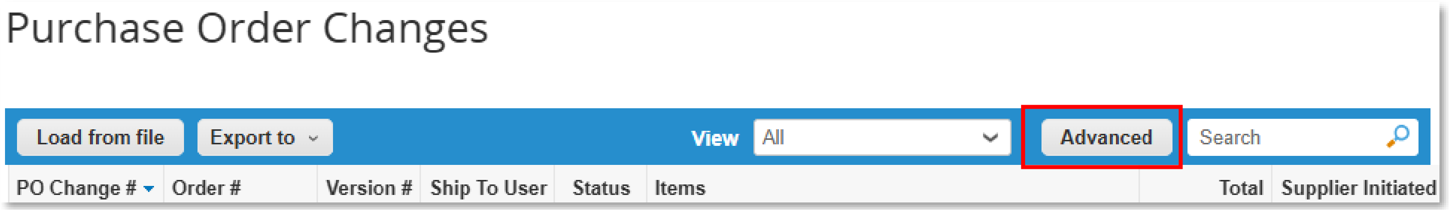
STEP 3 Click the **Advanced** button.

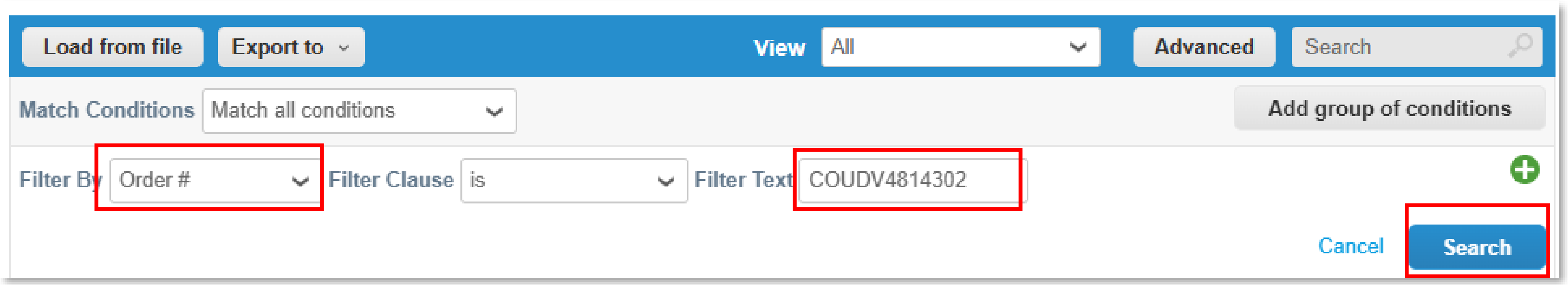
STEP 4 In the **Filter By** field, select **Order #.**

In the **Filter Text** field, enter the **PO number**.

Click **Search**.

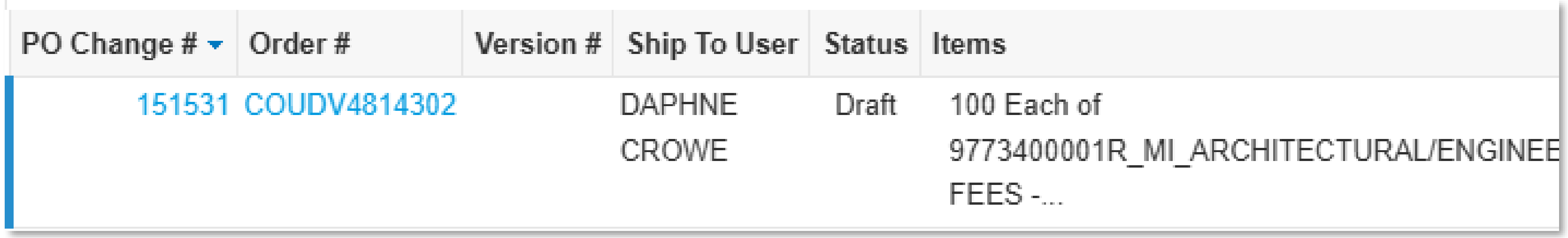






Viewing PO Change Orders

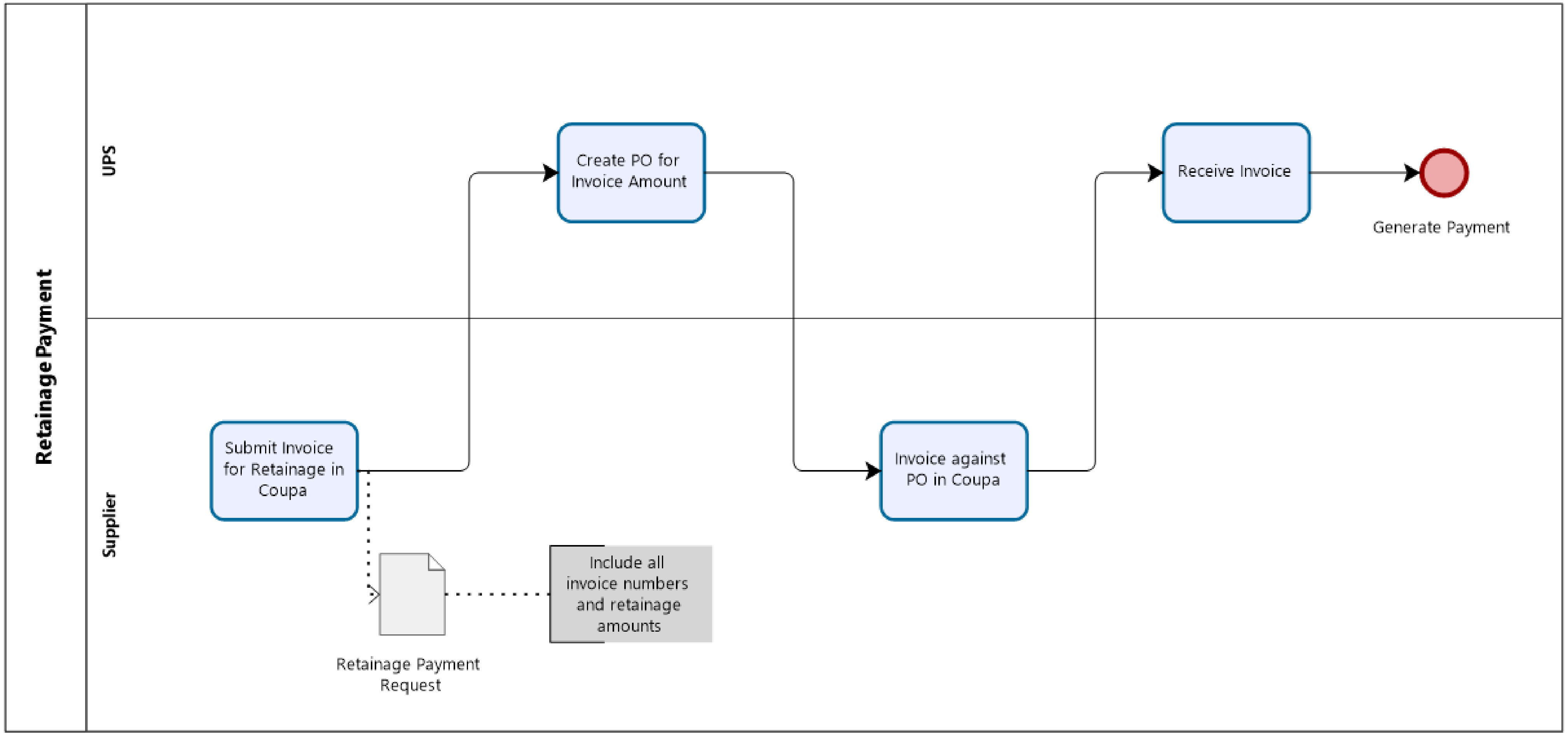
STEP 5 Click on the **PO Change #.**



PO Change #	Order #	Version #	Ship To User	Status	Items
151531	COUDV4814302		DAPHNE CROWE	Draft	100 Each of 9773400001R_MI_ARCHITECTURAL/ENGINEE FEES -...

STEP 6 Scroll down to the **History** section to view changes.

Retainage Payment



Retainage Payment

Upon completion of work and retainage amount is to be paid:

STEP 1 Send retainage payment request to UPS.

Request must include invoices numbers and retainage amount withheld per invoice.
Note: Only one PO at a time may be requested for retainage payment.

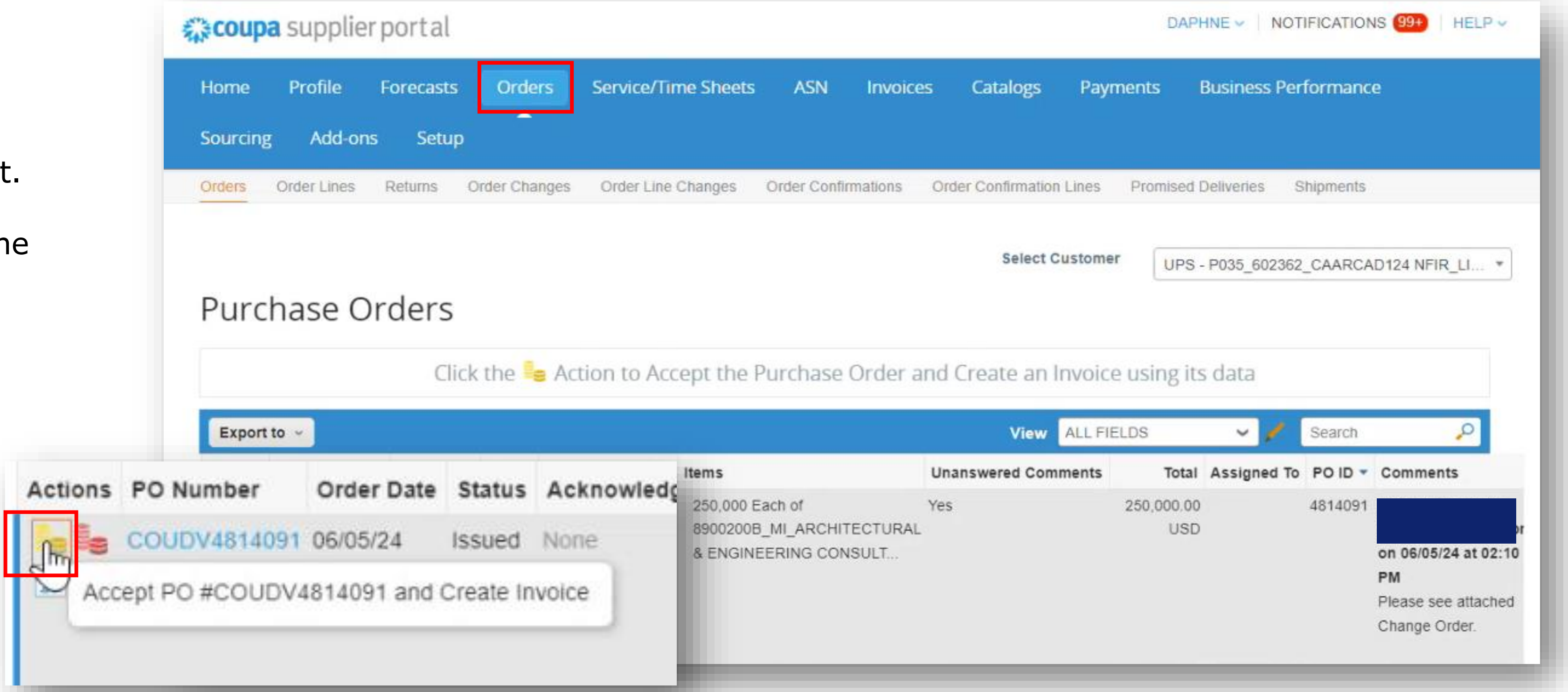
CSP will send a notification when UPS has created a PO for this retainage request.

Retainage Payment cont.

STEP 2 Click the **Orders** tab.

STEP 3 Locate the correct purchase order in the **Purchase Orders** list.

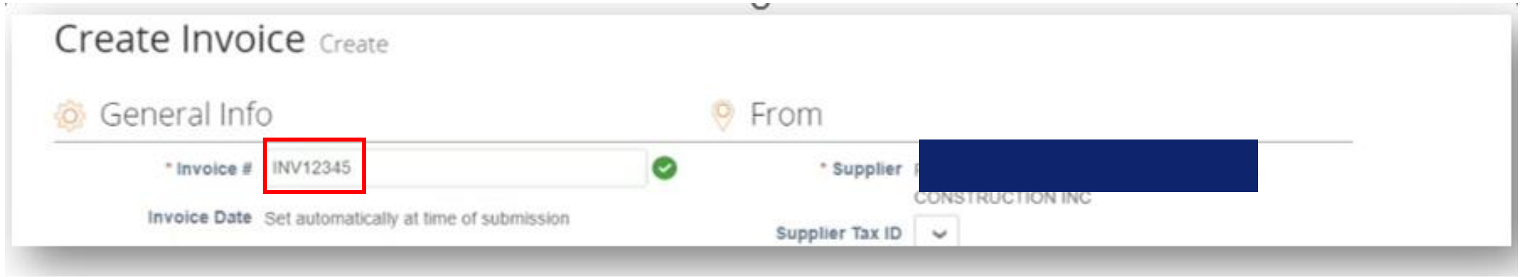
In the **Actions** column, click on the **gold coins** to create an invoice.

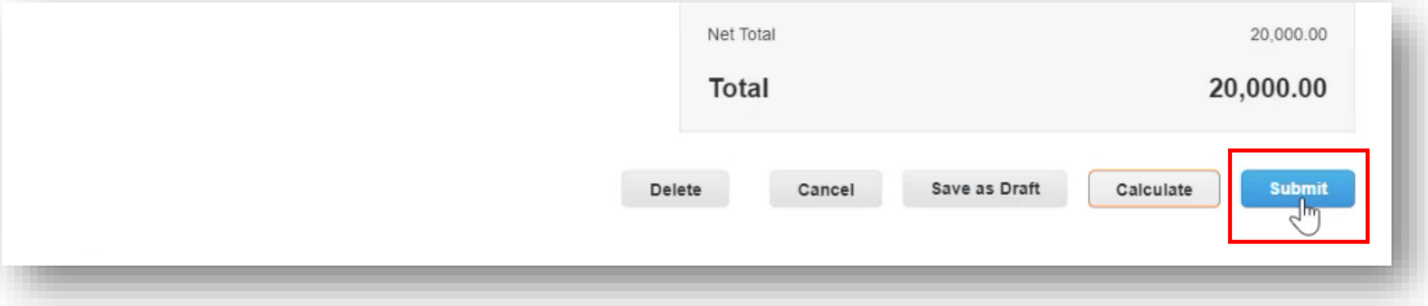


Invoicing

STEP 4 Enter a **unique invoice number** in the **Invoice #** field (the green check indicates success).

STEP 5 Scroll down below the **Taxes & Totals** section of the invoice and click **Submit**.





THANK YOU