



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

November 2025

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



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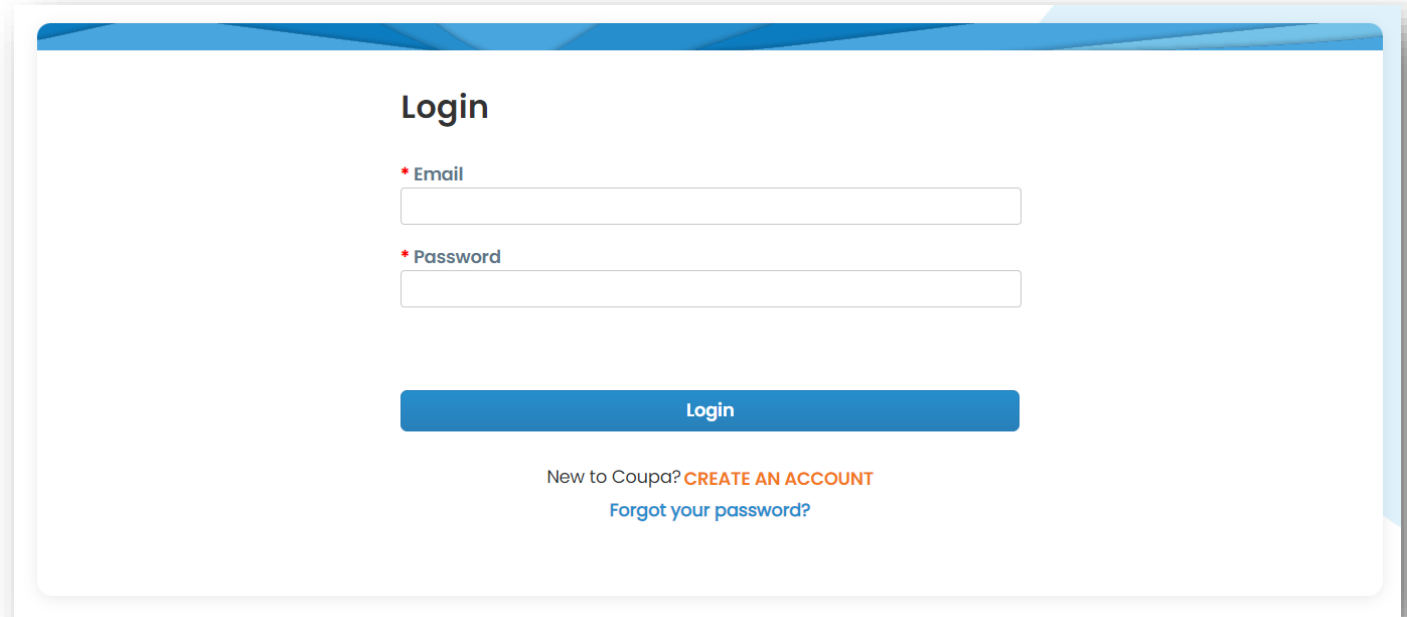
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# CSP Login

- 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.



The screenshot shows the login interface of the Coupa Supplier Portal. It features a blue header bar. Below it, the word "Login" is centered. There are two input fields: one for "Email" and one for "Password", both preceded by a red asterisk. A blue "Login" button is positioned below the password field. At the bottom, there is a link "New to Coupa? CREATE AN ACCOUNT" and a link "Forgot your password?".



The screenshot shows a "Select Customer" dropdown menu. The text "Select Customer" is on the left, and the dropdown box on the right displays "UPS" with a downward arrow.

# 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.

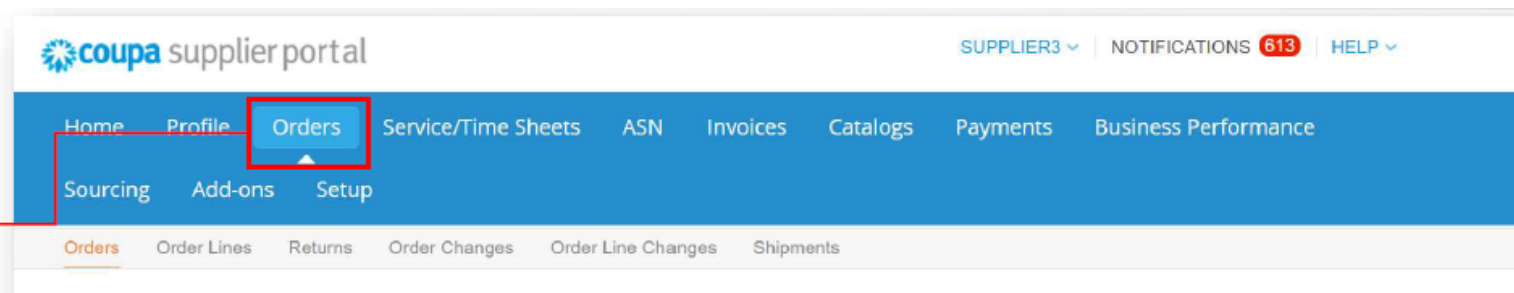
The screenshot shows the Coupa Supplier Portal interface. At the top, the user's name 'DAPHNE' is displayed with a dropdown menu open, showing options: 'Account Settings', 'Notification Preferences' (highlighted with a mouse cursor), and 'Log Out'. Below the navigation bar, the 'Orders' section is active. It contains a table with notification preferences for three types of events: 'A new order is received', 'A new comment is received', and 'An order is canceled'. For each event, there are checkboxes for 'Online', 'Email', and 'SMS'. The 'A new comment is received' row is highlighted with a mouse cursor. At the bottom right of the page, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red rectangle.

Notification Type	Online	Email	SMS
A new order is received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A new comment is received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
An order is canceled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Save

# 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.



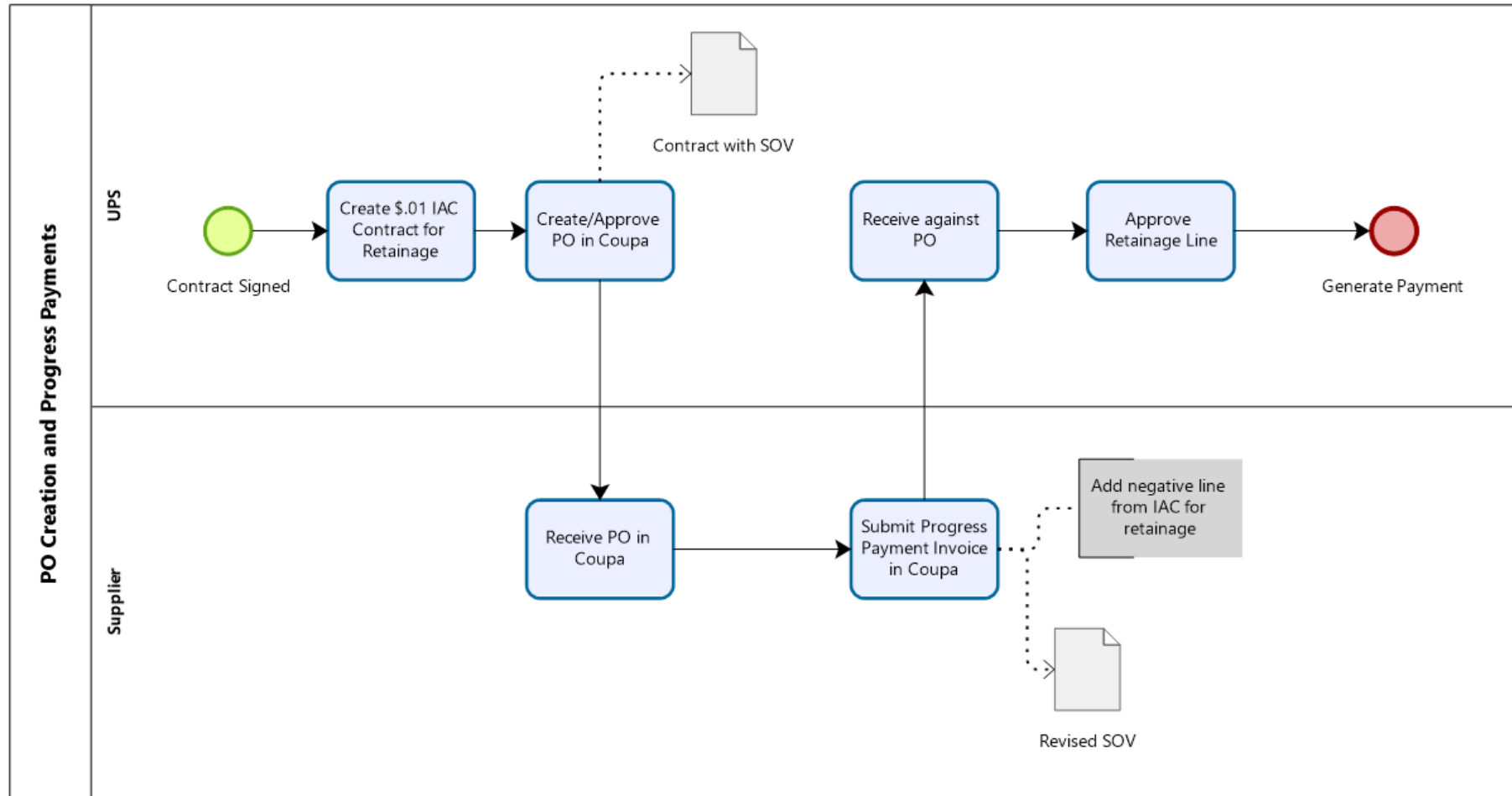
Purchase Orders

Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
<a href="#">COU1496</a>	10/21/20	Issued	None	1 Each of Test Item	No	20.00 USD		
<a href="#">COU1473</a>	10/15/20	Soft Closed	None	1 Each of Test Item	No	20.00 USD		
<a href="#">COU1471</a>	10/15/20	Issued	None	2 Each of Test Item	No	20.25 USD		
<a href="#">COU1466</a>	10/13/20	Closed	None	1 Each of Test Item	No	20.00 USD		
<a href="#">COU1461</a>	10/13/20	Soft Closed	None	4.55 Work Hour of Test Item	No	45.50 USD		
<a href="#">COU1396</a>	09/24/20	Soft Closed	None	1 Each of MBF8505_ML_REFRIGERATOR (REACH IN) 21.0 CU FT C... 1 Each of MBF8505_ML_REFRIGERATOR (REACH	No	2,778.00 USD		

Chat with Coupa Support

# Invoicing




# 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.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes tabs for Home, Profile, Forecasts, **Orders** (highlighted), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below this, a sub-navigation bar lists various order-related actions. The main content area is titled 'Purchase Orders' and contains a table of purchase orders. A tooltip is displayed over the 'Actions' column of the first row, indicating the option to 'Accept PO #COUDV4814091 and Create Invoice'.

Actions	PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Assigned To	PO ID	Comments
	COUDV4814091	06/05/24	Issued	None	250,000 Each of 8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULT...	Yes	250,000.00 USD		4814091	DAPHNE CROWE (@3204014@ups.com) on 06/05/24 at 02:10 PM Please see attached Change Order.

# Invoicing

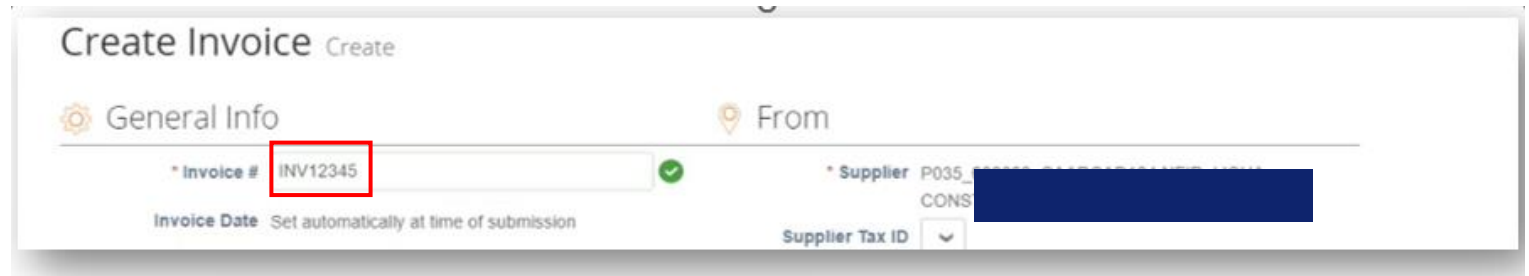
STEP 3 Enter a **unique invoice number** in the **Invoice #** field (the green check indicates success).

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.

Note: Also attach any applicable **Pay Applications** and/or **Lein Wavers** in this section as well.



Create Invoice Create

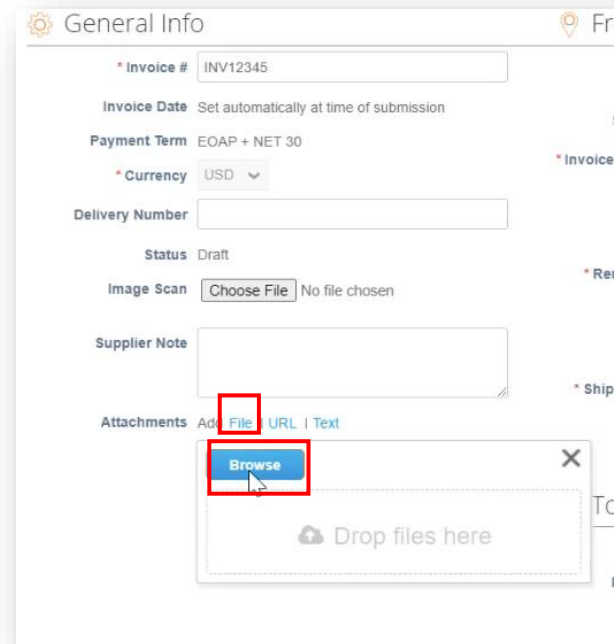
General Info From

\* Invoice # INV12345 ✓

Invoice Date Set automatically at time of submission

\* Supplier P035 CONS

Supplier Tax ID



General Info From

\* Invoice # INV12345

Invoice Date Set automatically at time of submission

Payment Term EOAP + NET 30

\* Currency USD

Delivery Number

Status Draft

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File URL Text

Browse

Drop files here



# 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.

Type	Description	Qty	UOM	Price	
	8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY-FOR PE PROJECTS > \$25000 (FOR NCA PO ORDERS ONLY)	20000	Each	1.00	250,000.00

+ Add Line    + Pick lines from Contract

**Totals & Taxes**

Lines Net Total	250,000.00
-----------------	------------

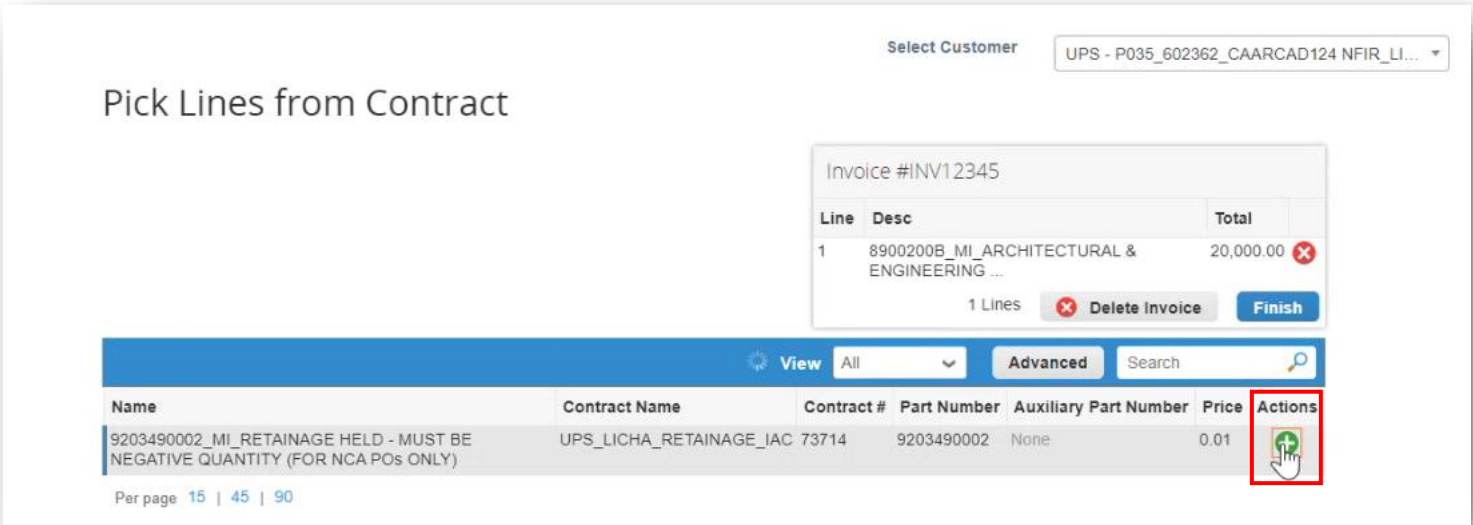
*Note: Retainage rates (5 to 10 percent) are reflected in the contract with UPS.*

# 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 positive number.

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

This screenshot shows a form for entering a RETAINAGE line. The fields are as follows:

Type	Description	Qty	UOM	Price	
Qty	9203490002_MI_RETAINAGE HELD - MUST BE NEGATIVE QUANTITY (FOR NCA POs ONLY)	-1	Each	2,000.00	-2,000.00

Below the main form, there are additional fields:

PO Line	Service/Time Sheet Line	Contract	Supplier Part Number
None	None	UPS_LICHA_RETAINAGE_IA	9203490002

This screenshot shows the 'Lines' form with a popup window. The fields are as follows:

Type	Description	Qty	UOM	Price	
	8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY-FOR PE PROJECTS > \$25000 (FOR NCA PO ORDERS ONLY)	20,000	Each	1.00	20,000.00

Below the main form, there are additional fields:

PO Line	Service	Credit Line
COUDV4814091-1	None	None

Supplier Part Number: [Empty field]

Billing: 002010-G003-151908-0000-0000-000000-0312220198-004-10003

A popup window is displayed with the message: "You are going to update price, which was set in Catalog". The popup has a close button (X) in the bottom left corner.

# Invoicing – Retainage Message Errors

## Note:

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

Invoice #INV12345 [Edit](#)

**Please fix the errors below**

- Line items that begin with "00" in the "Billing" section require a retainage credit line using item number 9203490002. Please select the "Pick Lines From Contract" link below to add this item to your invoice. The quantity must be "-1."

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

Invoice #INV12345 [Edit](#)

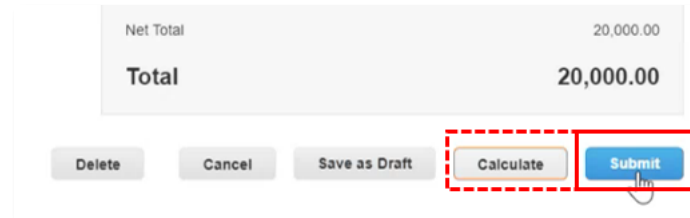
**Please fix the errors below**

- Item 9203490002 must be a credit with "-1" in the quantity field.

# 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.



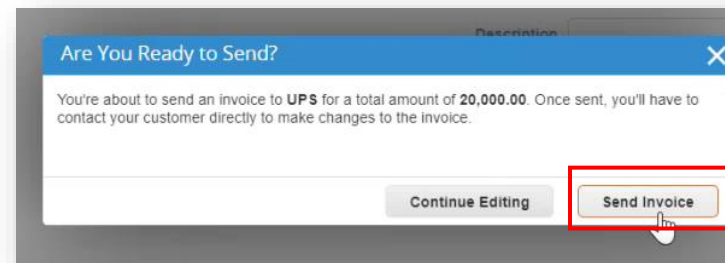
Net Total 20,000.00

Total 20,000.00

Delete Cancel Save as Draft Calculate Submit

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

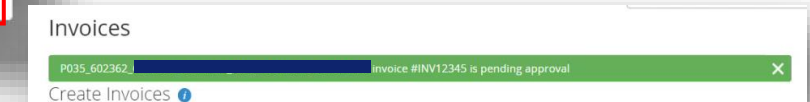
Back on the **Invoices** screen, the green banner of success will appear when submission is complete.



Are You Ready to Send?

You're about to send an invoice to **UPS** for a total amount of **20,000.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing Send Invoice

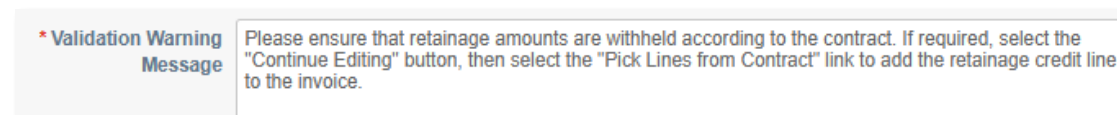


Invoices

P035\_602362 Invoice #IHW12345 is pending approval

Create Invoices

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

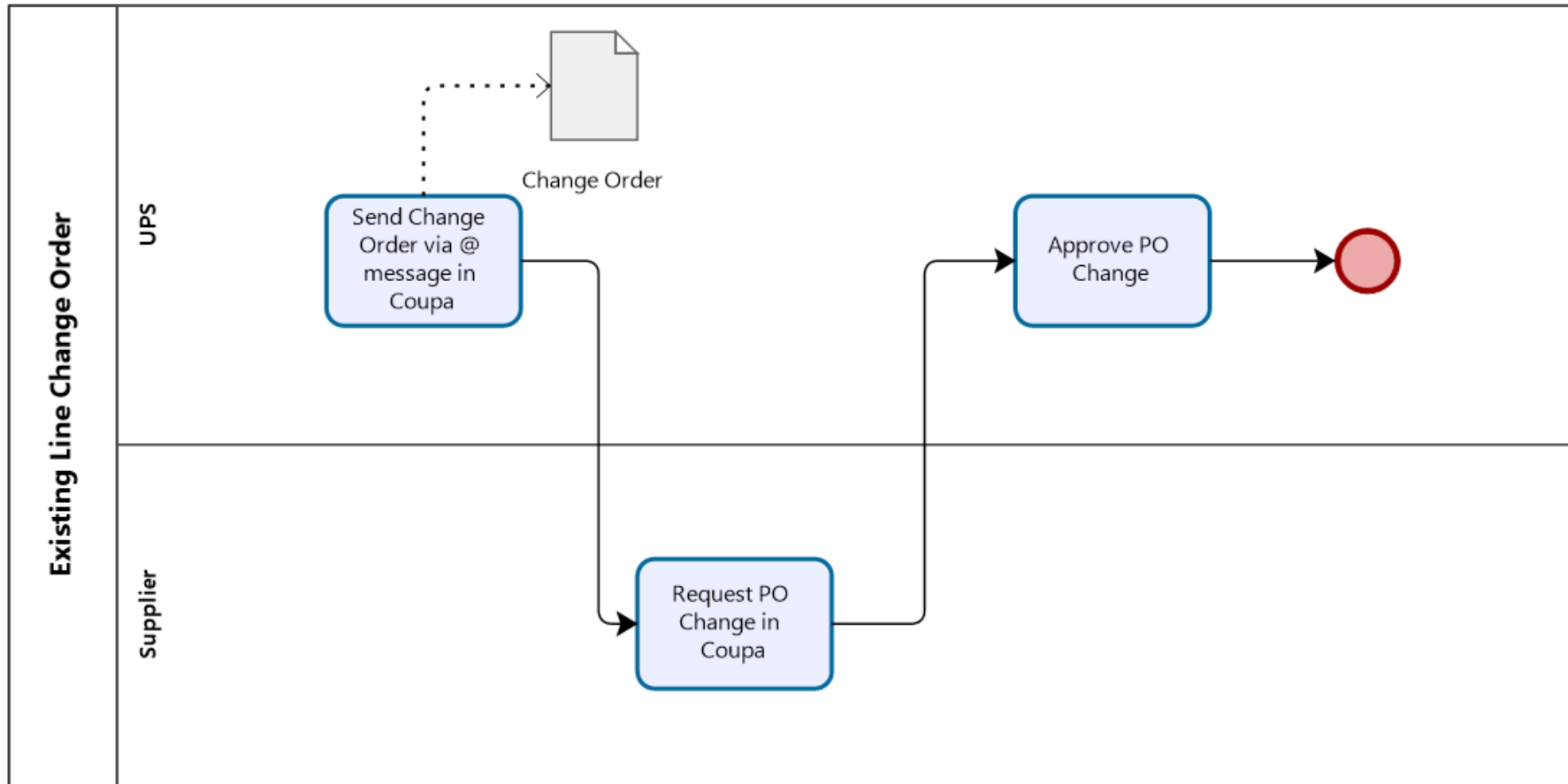


\* Validation Warning Message

Please ensure that retainage amounts are withheld according to the contract. If required, select the "Continue Editing" button, then select the "Pick Lines from Contract" link to add the retainage credit line to the invoice.



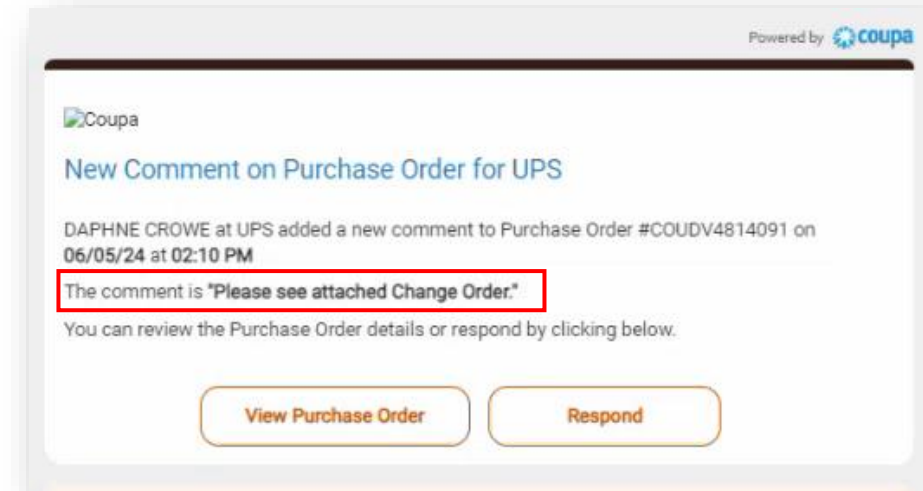
# Existing Line Change Orders



# 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.


Purchase Orders

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to

View ALL FIELDS

Search

Actions	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	PO ID	Comments
	<a href="#">COUDV4814091</a>	06/05/24	Issued	None	200,000 Each of 8900200B_ML_ARCHITECTURAL & ENGINEERING CONSULT...	Yes	200,000.00 USD		4814091	<div><div></div><div>on 06/05/24 at 02:10 PM</div><div>Please see attached Change Order.</div></div>

1 Comment

Mute Comments

Enter Comment

Add File | URL

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


Add Comment

Participants:

to supplier

06/05/24 at 02:10 PM

Please see attached Change Order.

 [Change\\_Order\\_Form\\_042624.xlsx](#)

# 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.*

The screenshot shows a web interface for a Purchase Order (PO) line item. At the top, there is a blue header bar with a search bar, a 'Sort by' dropdown, and a 'Line Number: 0 → 9' dropdown. Below the header is a table with columns: Type, Item, Qty, Unit, Price, Total, and Invoiced. The first row (line 1) shows a shopping cart icon, the item description '8900200B\_MI\_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY- FOR PE PROJECTS > \$25000 (FOR NCA PO ORDERS ONLY)', a quantity of 200,000, unit 'Each', price 1.00, total 200,000.00, and an invoiced amount of 0.00. Below the table is a section with five columns: Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, Manufacturer Part Number, and UPS Master Item Number, all with 'None' as the value. At the bottom right, a box shows 'Total USD 200,000.00'. At the very bottom, there are four buttons: 'Create Invoice', 'Request Change' (highlighted with a red box and a mouse cursor), 'Save', and 'Print View'.

Type	Item	Qty	Unit	Price	Total	Invoiced
1	8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY- FOR PE PROJECTS > \$25000 (FOR NCA PO ORDERS ONLY)	200,000	Each	1.00	200,000.00	0.00

Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	UPS Master Item Number
None	None	None	None	None

Per page 15 | 45 | 90

Total USD 200,000.00

Create Invoice Request Change Save Print View



# 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.

The screenshot shows a web interface for managing line items. At the top, there's a section titled 'Lines' with a table containing one line item. The table has columns for Type, Item, Qty, Unit, Price, and Total. The Qty field for the first item is highlighted with a red box and contains the value '250,000'. Below the table, there's a section for 'Reason for Change' with a dropdown menu set to 'Other'. Below that is a text area for 'Comment (required for "Other")' containing the text 'Per Change Order'. At the bottom right, there are four buttons: 'Cancel', 'Request PO Cancellation', 'Save Change Request', and 'Submit Change Request'. The 'Submit Change Request' button is highlighted with a red box and has a mouse cursor pointing at it.

Type	Item	* Qty	Unit	* Price	Total
1	8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST CATEGORY-FOR PE PROJECTS > \$25000 (FOR NCA PO ORDERS ONLY)	250,000	Each	1.000000	250,000

\* Reason for Change  
Other

\* Comment (required for "Other")  
Per Change Order

Cancel Request PO Cancellation Save Change Request **Submit Change Request**

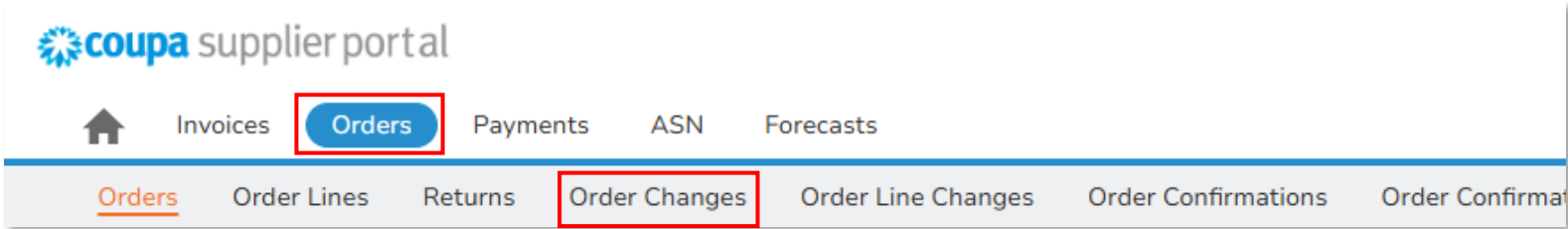
# Viewing PO Change Orders

STEP 1 Click on **Orders**.

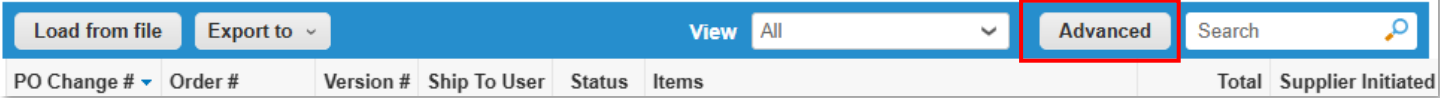
STEP 2 Click on **Order Changes**.

STEP 3 Click the **Advanced** button.

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

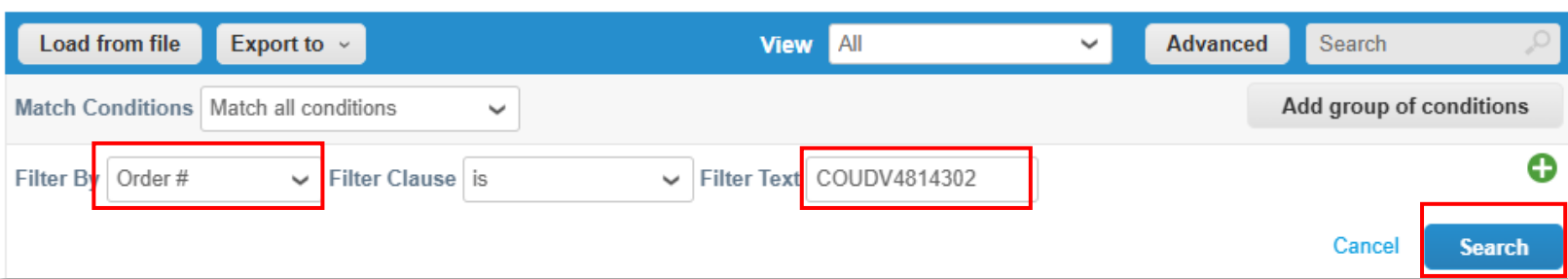


## Purchase Order Changes



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

Click **Search**.



# Viewing PO Change Orders

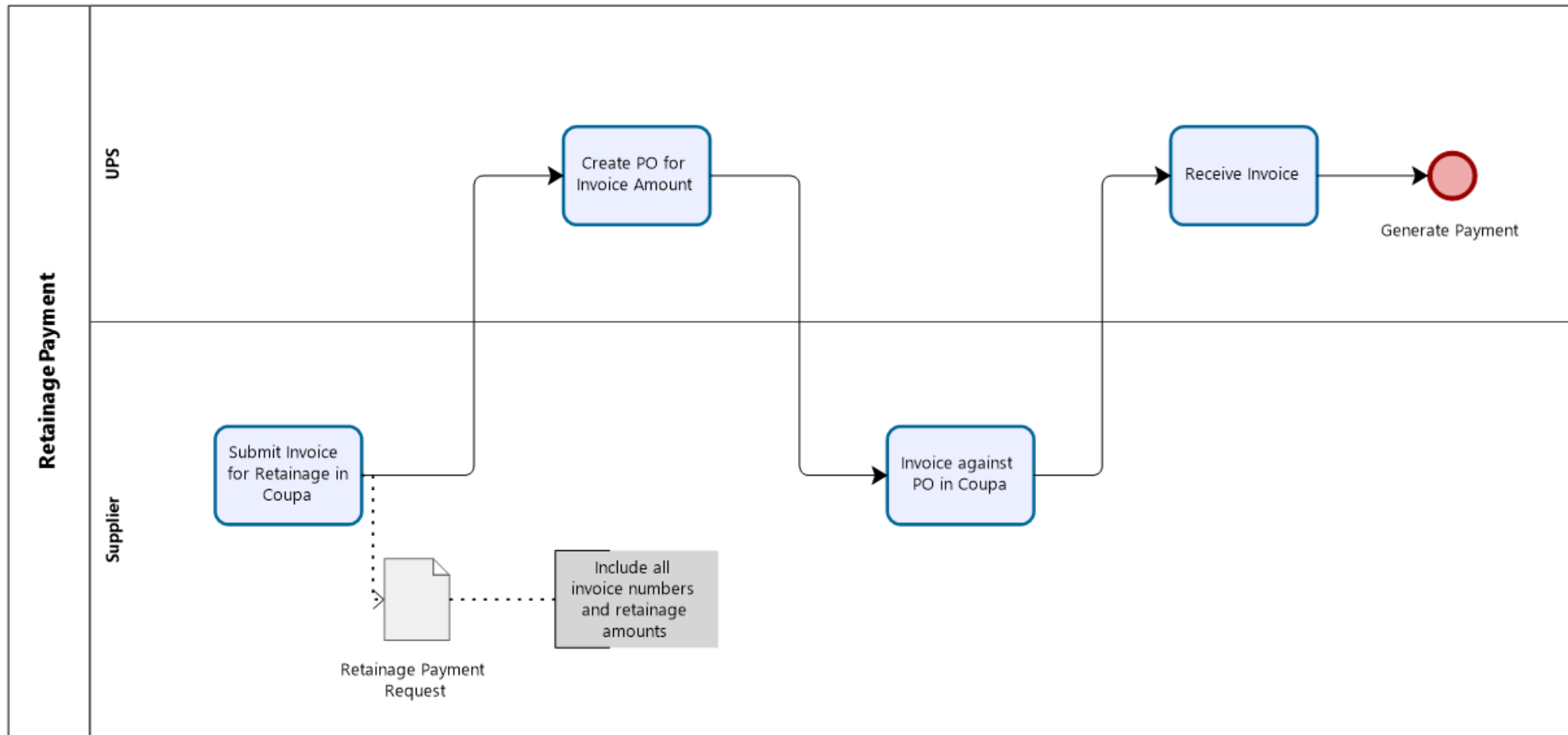
STEP 5 Click on the **PO Change #.**

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

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



# Retainage Payment



# Retainage Payment

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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.
- Attach any applicable **Pay Applications** and/or **Lein Wavers** with the request.
- 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. Then, proceed to Step 2.




# 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.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes tabs for Home, Profile, Forecasts, **Orders** (highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below this, a sub-navigation bar shows various order-related options. The main content area is titled 'Purchase Orders' and includes a search bar and a 'Select Customer' dropdown. A table of purchase orders is displayed, with columns for Actions, PO Number, Order Date, Status, Acknowledged, Items, Unanswered Comments, Total, Assigned To, PO ID, and Comments. The first row of the table is highlighted, and a tooltip is shown over the 'Actions' column, indicating the option to 'Accept PO #COUDV4814091 and Create Invoice'.

Actions	PO Number	Order Date	Status	Acknowledged	Items	Unanswered Comments	Total	Assigned To	PO ID	Comments
	COUDV4814091	06/05/24	Issued	None	250,000 Each of 8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULT...	Yes	250,000.00 USD		4814091	on 06/05/24 at 02:10 PM Please see attached Change Order.

# 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**.

Create Invoice

Create

General Info

From

\* Invoice #

INV12345

✓

\* Supplier

Invoice Date

Set automatically at time of submission

Supplier Tax ID

Net Total	20,000.00
Total	20,000.00

Delete

Cancel

Save as Draft

Calculate

Submit



**THANK YOU**