



## 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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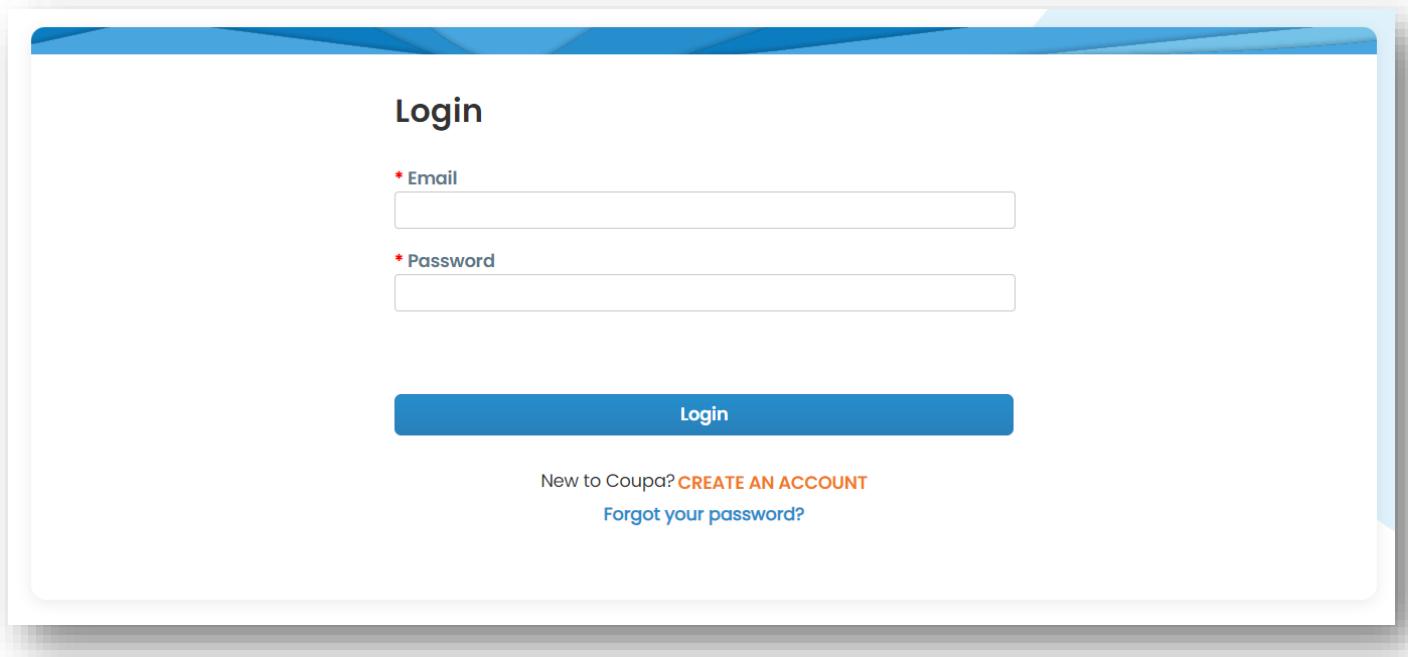
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# CSP Login

- 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.



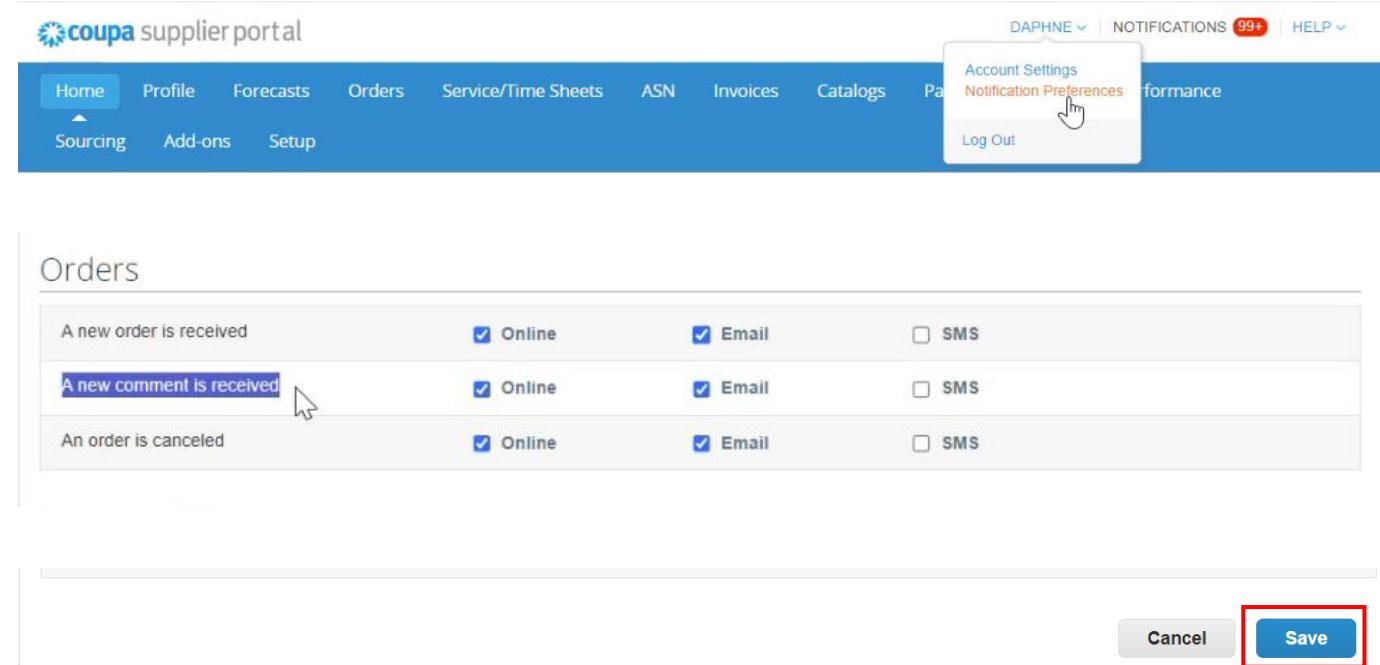
The image shows the login interface for the Coupa Supplier Portal (CSP). The page has a blue header and a white background. The title 'Login' is centered at the top. Below it are two input fields: one for 'Email' and one for 'Password', both marked with a red asterisk. A large blue 'Login' button is centered below the fields. At the bottom of the page, there are two links: 'New to Coupa? CREATE AN ACCOUNT' in orange and 'Forgot your password?' in blue.



The image shows a dropdown menu titled 'Select Customer'. The menu is open and displays a single option, 'UPS', which is highlighted. A small downward arrow icon is at the end of the dropdown list.

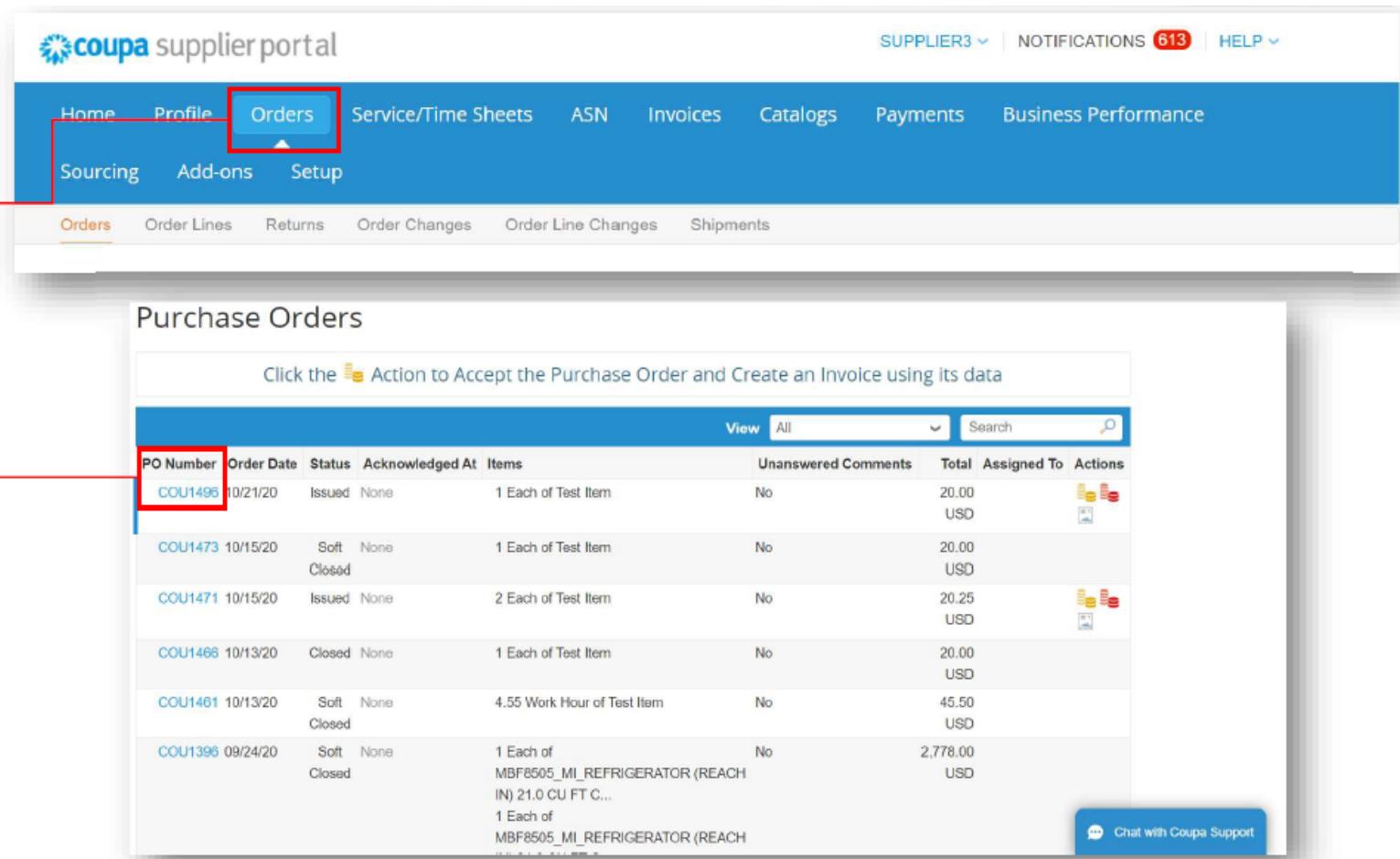
# Notifications Setup

- 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.

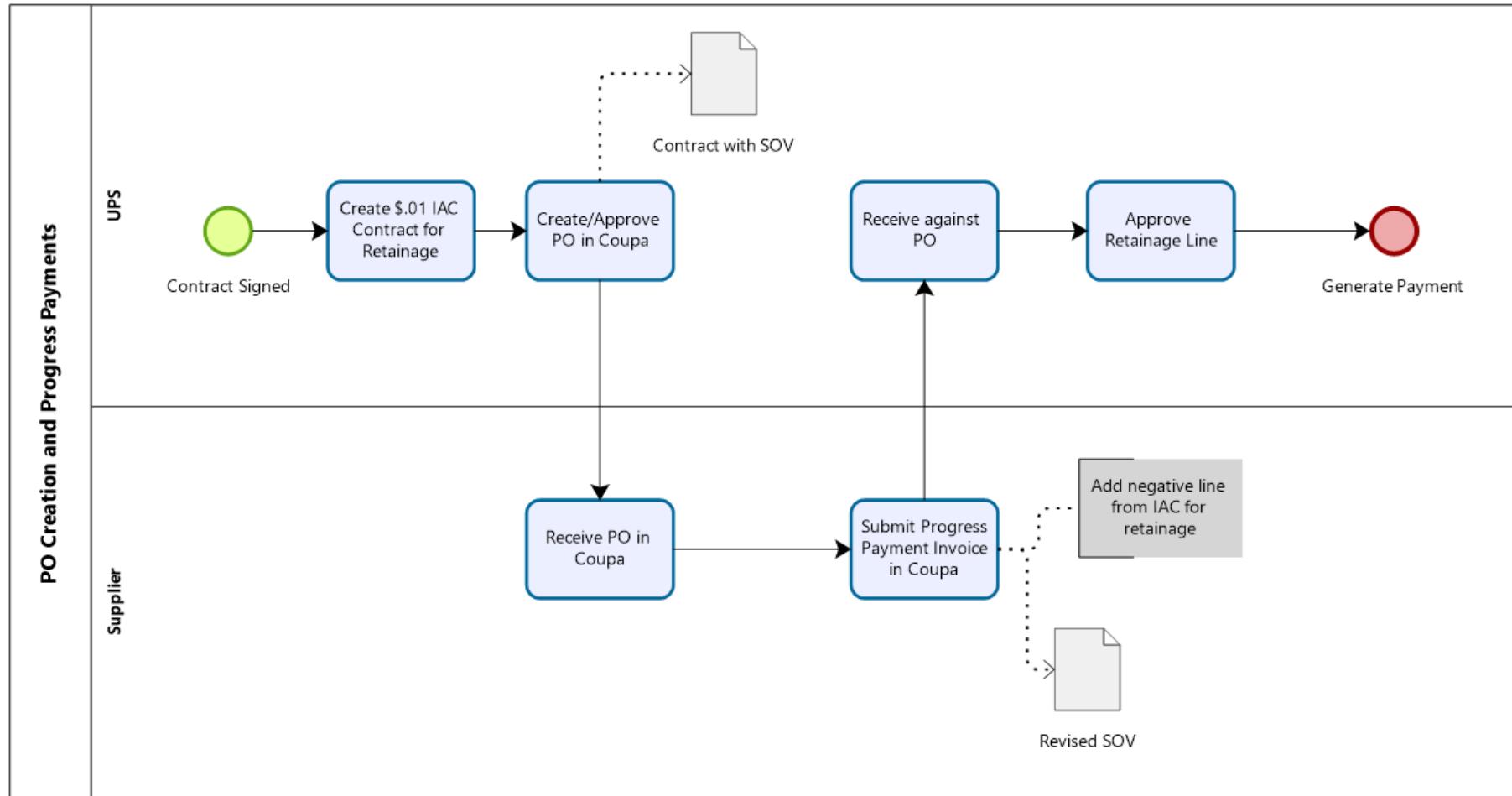


The screenshot shows the Coupa supplier portal interface. The top navigation bar includes links for Home, Profile, Orders (which is highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below the navigation bar, there are links for Sourcing, Add-ons, and Setup. The main content area is titled "Purchase Orders" and contains a table with the following data:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
COU1496	10/21/20	Issued	None	1 Each of Test Item	No	20.00	USD	
COU1473	10/15/20	Soft	None	1 Each of Test Item	No	20.00	USD	
COU1471	10/15/20	Issued	None	2 Each of Test Item	No	20.25	USD	
COU1466	10/13/20	Closed	None	1 Each of Test Item	No	20.00	USD	
COU1461	10/13/20	Soft	None	4.55 Work Hour of Test Item	No	45.50	USD	
COU1396	09/24/20	Soft	None	1 Each of MBF8505_MI_REFRIGERATOR (REACH IN) 21.0 CU FT C...	No	2,778.00	USD	
				1 Each of MBF8505_MI_REFRIGERATOR (REACH IN) 21.0 CU FT C...				

At the bottom right of the table, there is a blue button labeled "Chat with Coupa Support".

# Invoicing

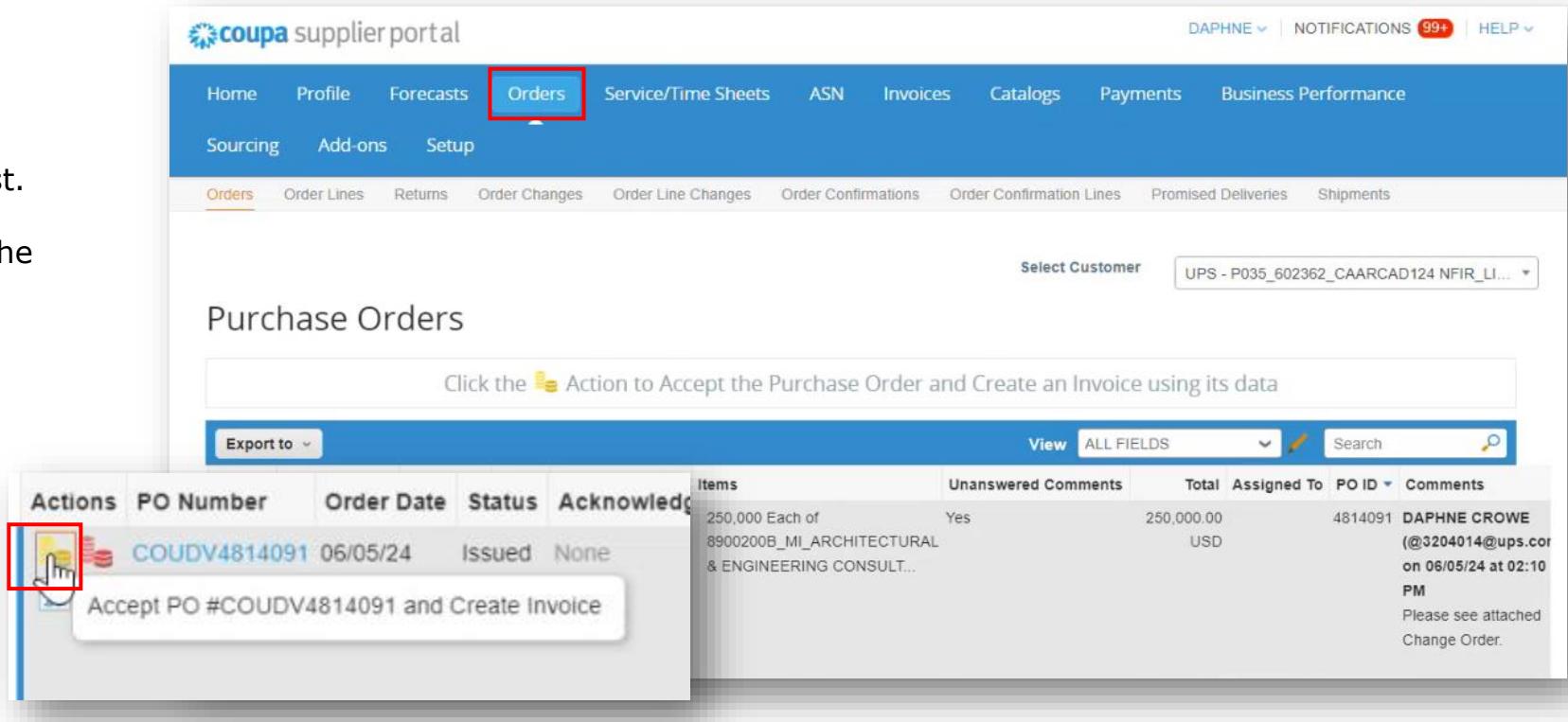


# Invoicing

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 links for Home, Profile, Forecasts, Orders (which is highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below the navigation is a sub-menu for Orders, including Order Lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Shipments. A 'Select Customer' dropdown is set to 'UPS - P035\_602362\_CAA...'. The main content area is titled 'Purchase Orders' and contains a table with columns: Actions, PO Number, Order Date, Status, Acknowledged, Items, Unanswered Comments, Total, Assigned To, PO ID, and Comments. A tooltip over the Actions column for PO COUDV4814091 says '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_M1_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.

The screenshot shows the 'Create Invoice' interface. In the 'General Info' section, the 'Invoice #' field contains 'INV12345' with a green checkmark indicating success. The 'Supplier' field shows 'P035' and 'CONS' with a redacted address. In the 'Attachments' section, a modal dialog is open, showing a 'Browse' button highlighted with a red box and a cursor hovering over it. Below the button is a 'Drop files here' area.

# 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.

Lines

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.

The screenshot shows the COUPA Invoicing software interface. At the top, there is a 'Select Customer' dropdown set to 'UPS - P035\_602362\_CAA...'. Below this is a title 'Pick Lines from Contract'.

The top section, 'Invoice #INV12345', displays a table with one line item:

Line	Desc	Total
1	8900200B_MI_ARCHITECTURAL & ENGINEERING ...	20,000.00

Below this are buttons: '1 Lines', 'Delete Invoice', and 'Finish'.

The main section, 'List of Contract Lines', shows a table of contract lines:

Name	Contract Name	Contract #	Part Number	Auxiliary Part Number	Price	Actions
9203490002_MI_RETAINAGE HELD - MUST BE NEGATIVE QUANTITY (FOR NCA POs ONLY)	UPS_LICHA_RETAINAGE_IAC	73714	9203490002	None	0.01	

Below the table are buttons: 'View', 'All', 'Advanced', 'Search', and a magnifying glass icon. A note at the bottom says 'Per page: 15 | 45 | 90'.

The bottom section shows a summary of the selected lines:

Line	Desc	Total
2	9203490002_MI_RETAINAGE HELD - MUST BE N...	0.01

Below this are buttons: '2 Lines', 'Delete Invoice', and 'Finish'.

The bottom part of the interface shows a table of contract lines:

Name	Contract Name	Contract #	Part Number	Auxiliary Part Number	Price	Actions
9203490002_MI_RETAINAGE HELD - MUST BE N...	UPS_LICHA_RETAINAGE_IAC	73714	9203490002	None	0.01	

Below this are buttons: 'View', 'All', 'Advanced', 'Search', and a magnifying glass icon. A note at the bottom says 'Per page: 15 | 45 | 90'.

# 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.

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

PO Line Service/Time Sheet Line Contract Supplier Part Number  
None None UPS\_LICHA\_RETAINAGE\_IAI 9203490002

**Lines**  Line Level Taxation

Type	Description	Qty	UOM	Price
8900200B_MI_ARCHITECTURAL & ENGINEERING CONSULTANT - BUILDING - BLDG COST	20,000	Each	1.00	20,000.00

PO Line Service Credit Line  
COUDV4814091-1 None None

Supplier Part Number Billing  
002010-G003-151908-0000-0000-00000-00000-0312220198-004-10003

You are going to update price, which was set in Catalog

# 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](#)

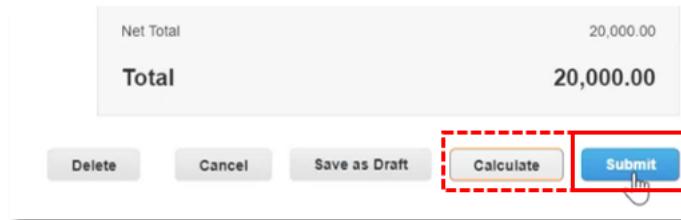
**Please fix the errors below**

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

# Invoicing

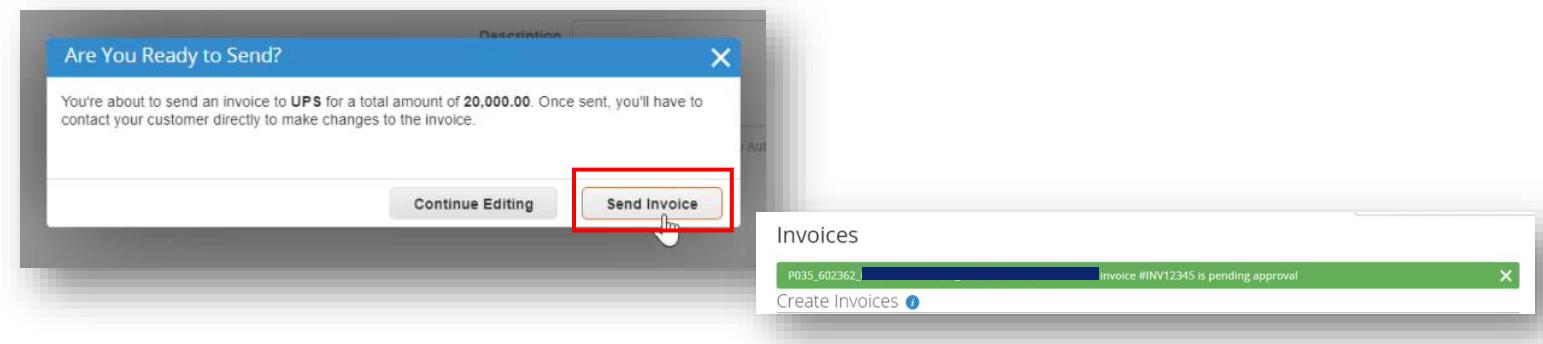
STEP 12 Scroll down below the **Taxes & Totals** section of the invoice and click **Submit**.

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

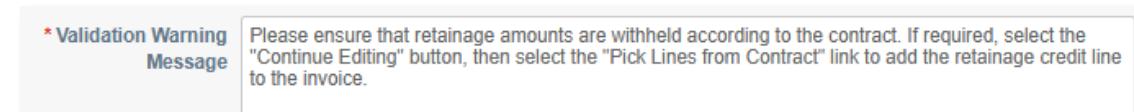


STEP 13 On the popup window, click **Send Invoice**.

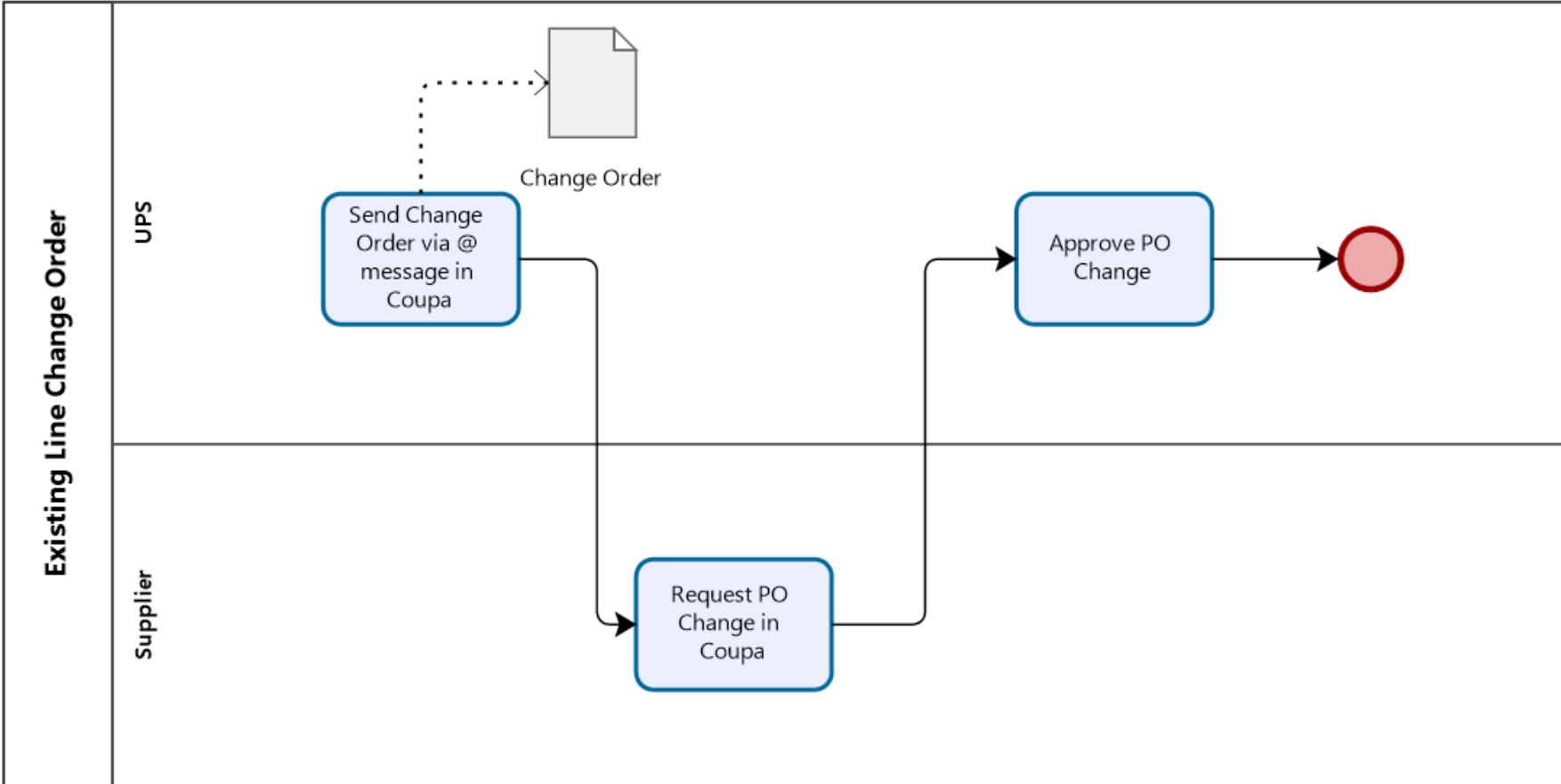
Back on the **Invoices** screen, the green banner of success will appear when submission is complete.



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



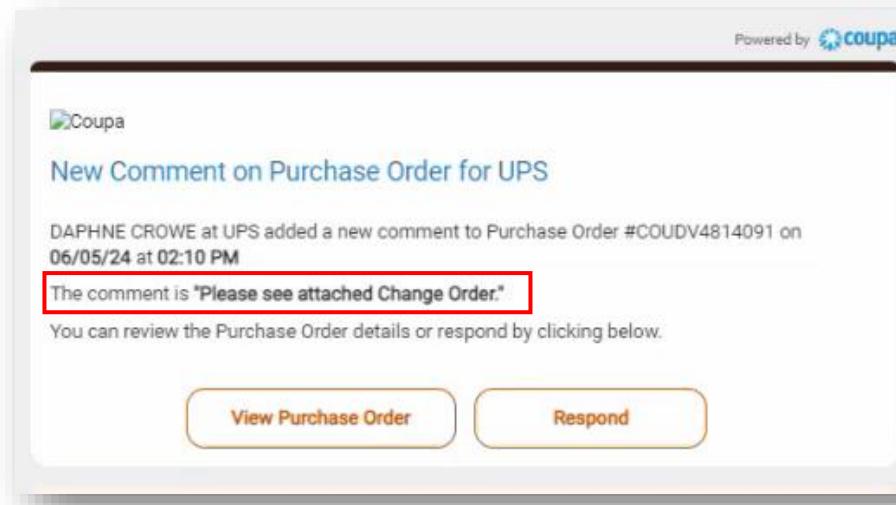
# Existing Line Change Orders



# 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.



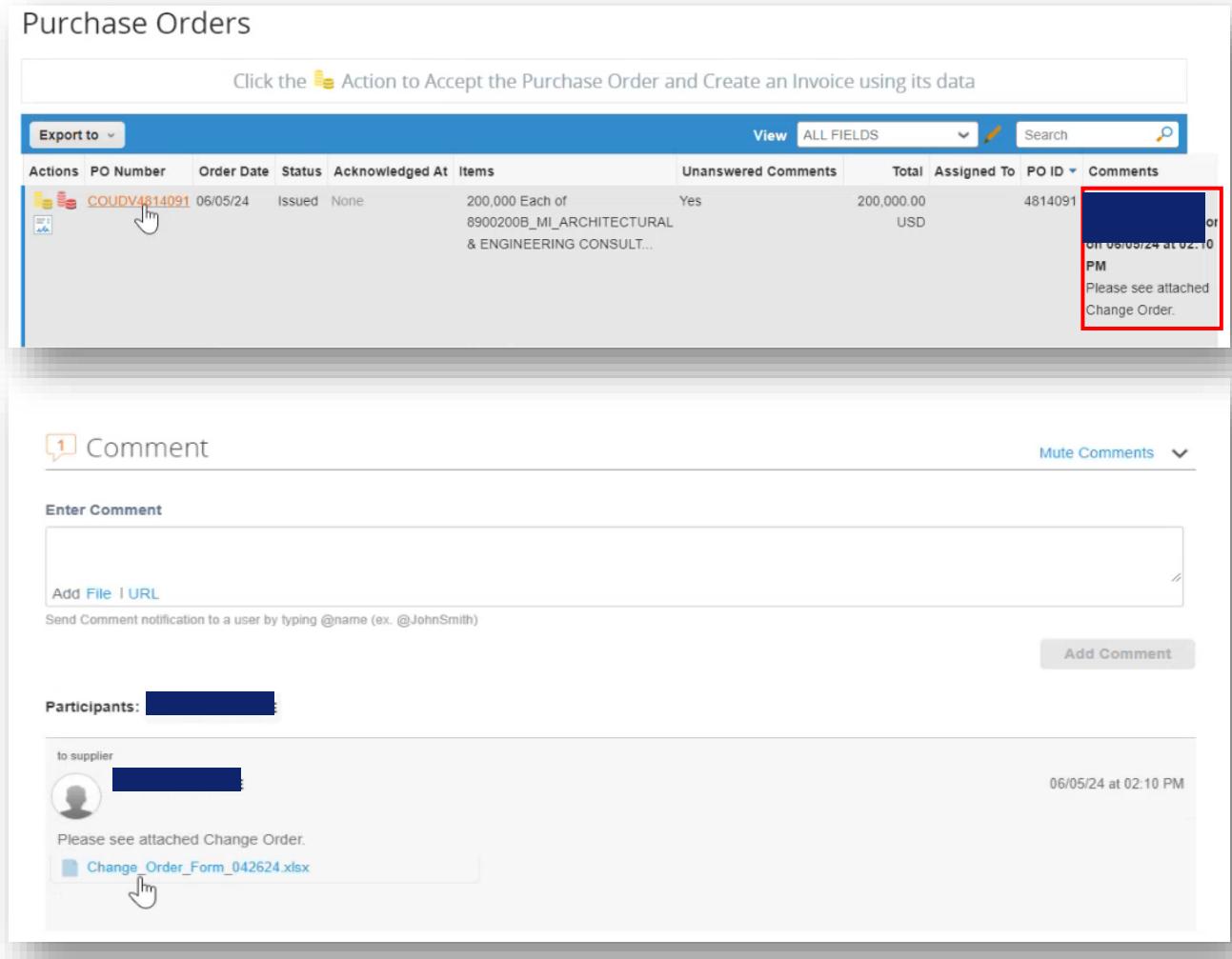
The screenshot shows the "My Notifications" page. At the top right is a "Notification Preferences" button. Below is a "View" dropdown set to "All". The main area lists notifications:

	Message	Received
<input type="checkbox"/>	New comment from UPS - P035_602362_CAARCAD124 NFIR_LICHA CONSTRUCTION INC on	06/05/24 06:10 PM
<input type="checkbox"/>	New PO COUDV4814091 for \$200,000.00 issued by UPS - P035_602362_CAARCAD124 NFIR_LICHA CONSTRUCTION INC.	06/05/24 06:08 PM

# 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.



The image shows two screenshots of a software interface. The top screenshot is a 'Purchase Orders' list. It includes columns for Actions, PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, PO ID, and Comments. A specific row is highlighted with a red box, showing PO Number COUDV4814091, Order Date 06/05/24, Status Issued, Acknowledged At None, Items 200,000 Each of 8900200B\_MI\_ARCHITECTURAL & ENGINEERING CONSULT..., Total 200,000.00 USD, Assigned To 4814091, and a comment section. The comment section (bottom screenshot) shows a comment from a user named 'JohnSmith' with a timestamp of '06/05/24 at 02:10 PM'. The comment text is: 'Please see attached Change Order.' An attachment named 'Change\_Order\_Form\_042624.xlsx' is shown with a download icon.

# 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.*

Line Change Order Details							
Line	Type	Item	Qty	Unit	Price	Total	Invoiced
1	Cart	89002008_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

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.

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

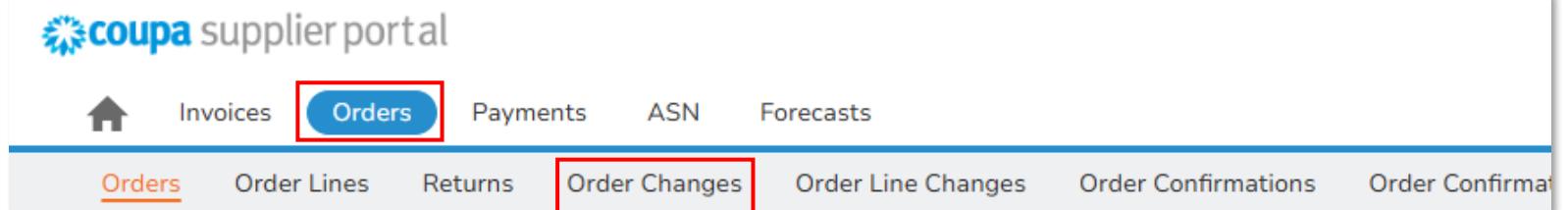
\* Reason for Change  
Other

\* 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**.



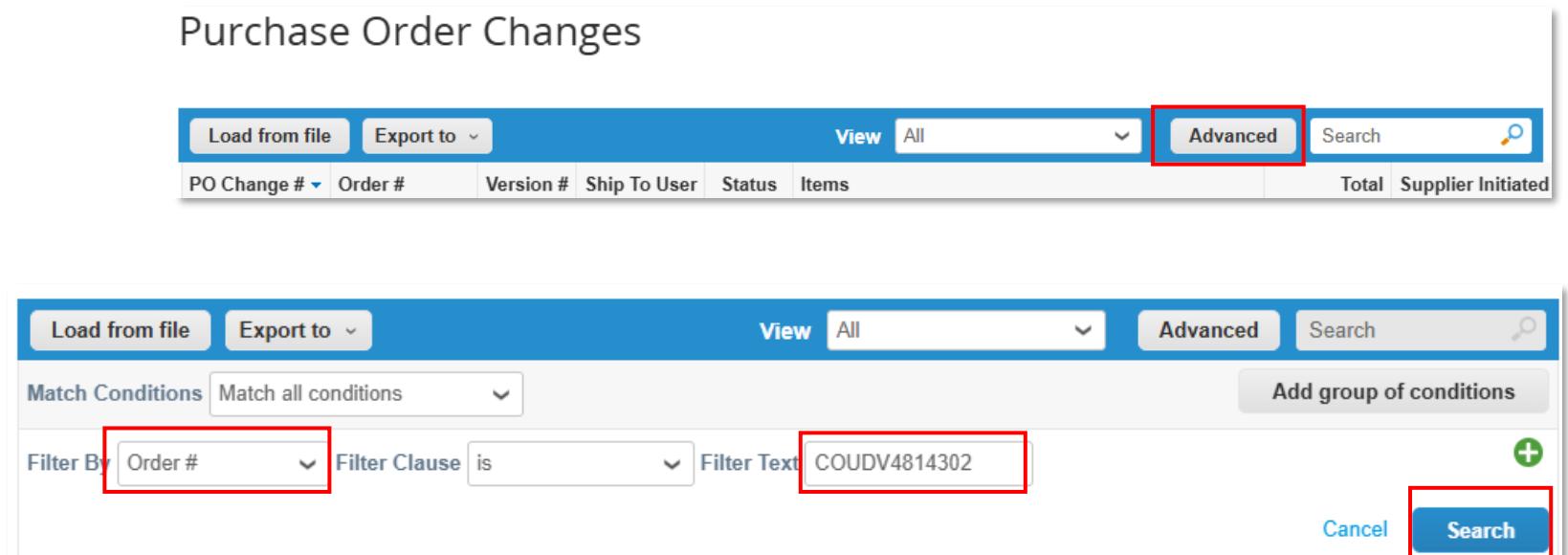
STEP 2 Click on **Order Changes**.

STEP 3 Click the **Advanced** button.

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

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

Click **Search**.



Purchase Order Changes

Load from file Export to View All Advanced Search 

PO Change # Order # Version # Ship To User Status Items Total Supplier Initiated

Match Conditions Match all conditions Add group of conditions

Filter By Order # Filter Clause is Filter Text COUDV4814302

Cancel Search

# Viewing PO Change Orders

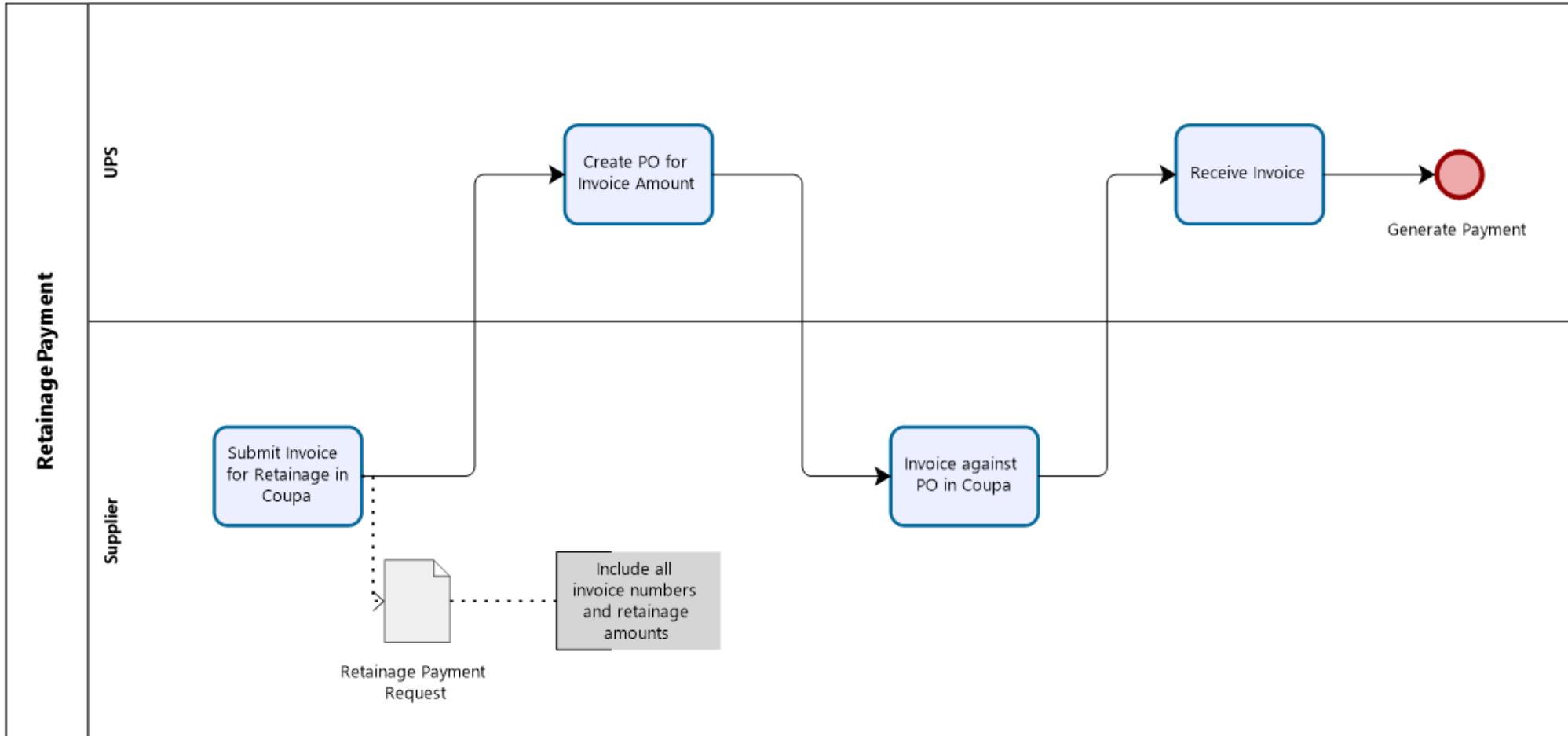
STEP 5 Click on the **PO Change #**.

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 shows the Coupa supplier portal interface. The top navigation bar includes links for Home, Profile, Forecasts, Orders (which is highlighted with a red box), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below the navigation bar, there are sub-links for Sourcing, Add-ons, and Setup, and a dropdown menu for Orders. The main content area is titled 'Purchase Orders' and contains a table with columns for Actions, PO Number, Order Date, Status, Acknowledged, Items, Unanswered Comments, Total, Assigned To, PO ID, and Comments. The first row in the table is highlighted with a red box around the 'Actions' column. A tooltip box with the text 'Accept PO #COUDV4814091 and Create Invoice' is overlaid on the gold coin icon in the Actions column for the first row. The table shows a purchase order for 250,000 units of 8900200B\_M1\_ARCHITECTURAL & ENGINEERING CONSULT.. The total value is 250,000.00 USD, assigned to PO ID 4814091, and the status is Issued with None acknowledged. The comments section notes a change order was made on 06/05/24 at 02:10 PM, with a note to please see attached.

# 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**.

The image shows a screenshot of a web-based invoicing application. At the top, there is a header with the text 'Create Invoice' and a 'Create' button. Below this is a 'General Info' section with fields for 'Invoice #' (containing 'INV12345' with a green checkmark), 'Supplier' (a blue redacted box), and 'Supplier Tax ID' (a dropdown menu). The 'Invoice Date' field is set to 'Set automatically at time of submission'. Below this is a 'Taxes & Totals' section showing a table with one row. The table has two columns: 'Net Total' and 'Total'. Both columns show the value '20,000.00'. At the bottom of this section are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. The 'Submit' button is highlighted with a red box and a hand cursor icon.

Net Total	20,000.00
<b>Total</b>	<b>20,000.00</b>



**THANK YOU**