



COUPA SUPPLIER PORTAL TRAINING GUIDE

**SUPPLIER TRAINING GUIDE
COUPA SUPPLIER PORTAL REGISTRATION & SUPPLIER INFORMATION REQUEST FORM**

INTERNAL – Blue Origin Proprietary Information – Blue Origin and Trusted Partners

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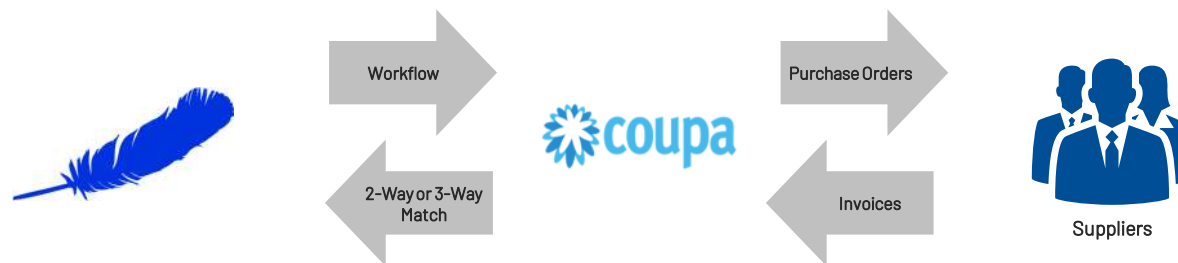
INTRODUCTION TO SOURCE TO PAY

Introduction to Source to Pay

WHAT IS SOURCE TO PAY?

Blue Origin has selected Coupa as the technology platform to streamline the procure-to-pay processes and electronic Purchase Order and Invoicing transmission.

- Coupa is a leading e-Procurement platform, connecting buyers with their suppliers
- Coupa will help automate newly-improved processes for both Blue Origin and suppliers
- The Coupa Supplier Portal (CSP) allows suppliers to become more efficient by automating activities, including invoice creation, as much as possible to fit into their capabilities (i.e. PO flip, orders routing, partial invoicing)
- The Coupa Supplier Portal (CSP) will be utilized by Blue Origin, LLC to create/send purchase orders, as well as receive invoices
- The Coupa Supplier Portal (CSP) is free - there is no cost for suppliers



Introduction to Source to Pay

HOW WILL YOU BENEFIT?

- By working with Blue Origin electronically, you will experience an increase in order-taking efficiency and invoice creation, a reduction in mistakes and delays when fulfilling orders, and an increased overall user experience.

- Efficient purchase order receiving and acknowledgement
- Efficient invoice processing
- Direct PO-backed invoice creation
- Automated accurate routing of invoices
- Instant visibility into purchase order and invoice status
- Reduced manual paper transaction processing and email trails



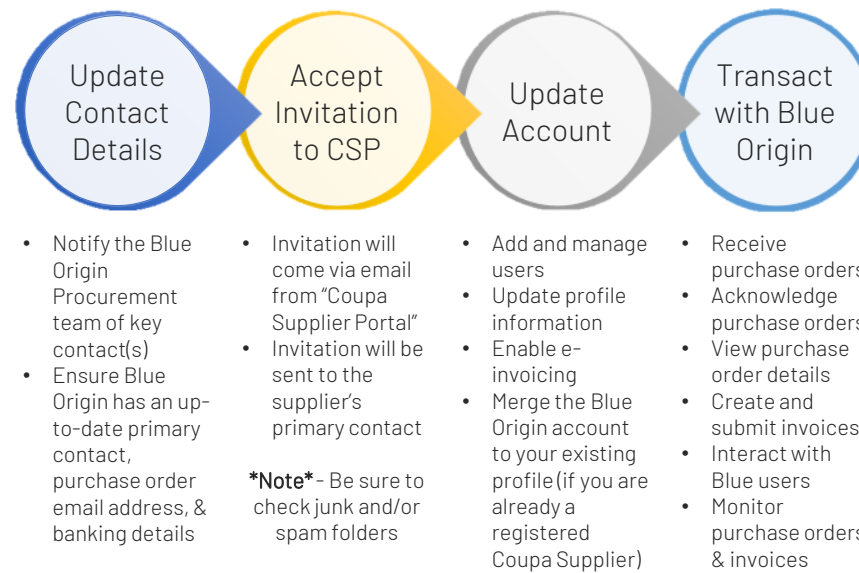


COUPA SUPPLIER PORTAL

Coupa Supplier Portal

CONNECTING TO THE COUPA SUPPLIER PORTAL

It is imperative that all suppliers connect to the Coupa Supplier Portal platform to transact with Blue Origin successfully. Each of the below steps must happen before a supplier can properly interact with Blue Origin:



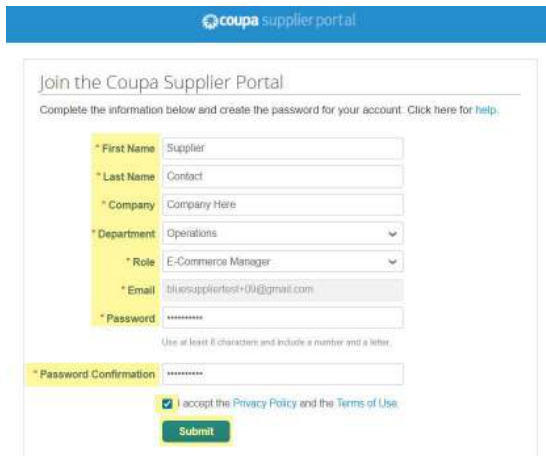
CSP Registration Invitation Tasks

SUPPLIERS JOIN AND RESPOND

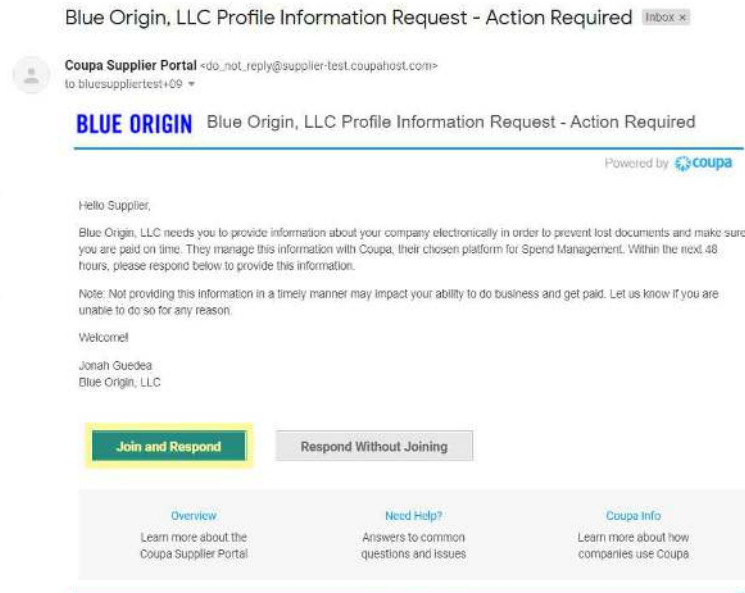
- Supplier Primary Contact receives email request for information: The email will be sent from Coupa Supplier Port.

 **Coupa Supplier Port.** **Blue Origin, LLC Profile Information Request - Action Required** - Blue Origin, LLC Profile Information Request - Action Required Powered by Coupa Softwa...

- Suppliers will be prompted to **Join and Respond**
- After Selecting the **Join and Respond** action button from their email, the suppliers will be directed to the CSP Registration page:



The screenshot shows the 'Join the Coupa Supplier Portal' registration page. It features a blue header with the 'coupa supplier portal' logo. Below the header, there is a form with the following fields: First Name (Supplier), Last Name (Contact), Company (Company Here), Department (Operations), Role (E-Commerce Manager), Email (bluesupplier-test-00@gmail.com), Password (masked with asterisks), and Password Confirmation (masked with asterisks). A checkbox for 'I accept the Privacy Policy and the Terms of Use' is checked. A 'Submit' button is located at the bottom of the form.

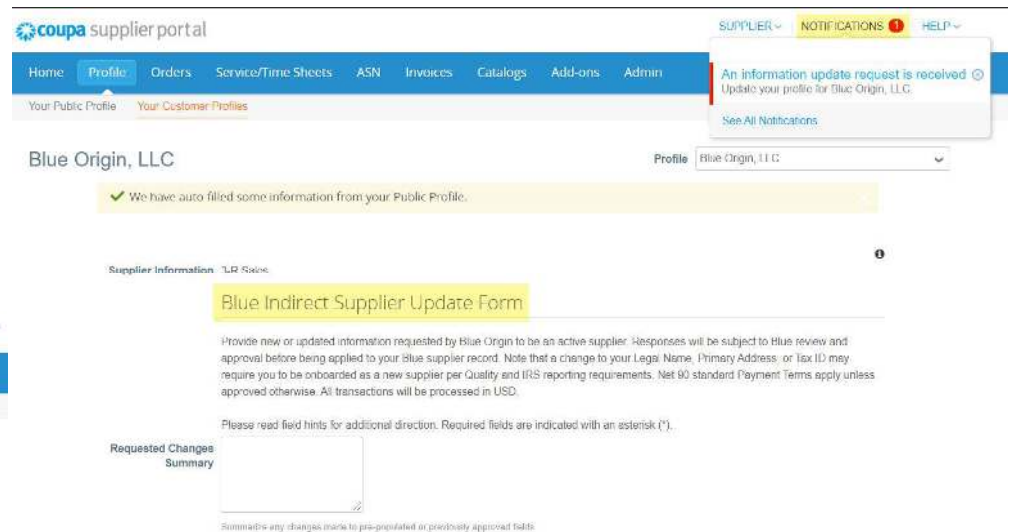
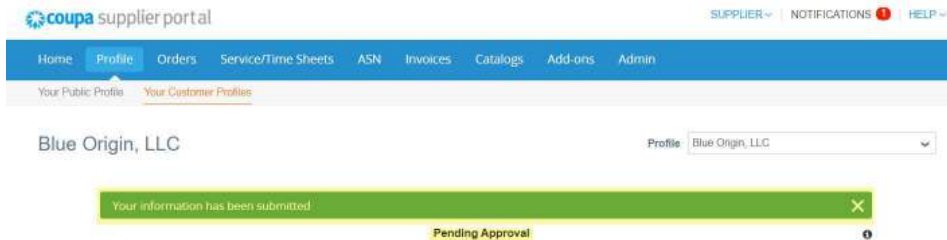


The screenshot shows an email invitation from 'Coupa Supplier Portal' to 'bluesupplier-test-09'. The email subject is 'Blue Origin, LLC Profile Information Request - Action Required'. The email body contains the following text: 'Hello Supplier, Blue Origin, LLC needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 48 hours, please respond below to provide this information. Note: Not providing this information in a timely manner may impact your ability to do business and get paid. Let us know if you are unable to do so for any reason. Welcome! Jonath Guedea Blue Origin, LLC'. At the bottom of the email, there are two buttons: 'Join and Respond' (highlighted in yellow) and 'Respond Without Joining'. Below the buttons, there are three links: 'Overview', 'Need Help?', and 'Coupa Info'.

CSP Registration Invitation Tasks

SUPPLIERS JOIN AND RESPOND

- Once a Supplier registers and has Joined the Coupa Supplier Portal, they will be automatically navigated to the Supplier Information Request Form in the CSP. Suppliers can also access the form request by hovering over the **Notifications** tab in the top right-hand corner of the page. The purpose of this form is to verify the information that Blue Origin has on file, as well as, provide our suppliers an opportunity to make necessary changes to information
- Following completion of the SIM Request Form, the supplier will select **Submit for Approval** at the bottom of the form
- The Supplier will receive confirmation that their response is in **Pending Approval** status once their response is submitted to Blue Origin for review and approval:




Coupa Supplier Portal

ONE PLATFORM WITH TWO INTERACTION METHODS


As a supplier, you have two ways that you can electronically interact with Blue Origin:

1. Supplier Actionable Notification (E-Mail)

New PO Inbox x

 **Blue Origin, LLC** <do_not_reply@blueorigin-test.coupa.com>
to me ▾

BLUE ORIGIN Blue Origin, LLC Purchase Order #10204854

Powered by 

Hi Supplier,

You have received a new purchase order #10204854 from Blue Origin, LLC Company.

Submitted By Requester 02
On Behalf Of Requester 02
Supplier Testco, Inc.
Total **172.00**

Items	1238Aa-3200	4 Each @ 43.00	172.00 USD
-------	-------------	----------------	------------

[View Order](#)

2. Coupa Supplier Portal

Purchase Order #10204854

Status: Issued - Sent via Email

Order Date: 07/14/20
Revision Date: 07/14/20
Requester: Requester 02
Email: BlueUAT002@gmail.com

Payment Term: None
PO Hold: None
WORK PERFORMED UNDER THIS ORDER: None
SUBJECT TO THE TERMS AND CONDITIONS OF THE FOLLOWING AGREEMENTS:

Pay Vendor Number: None
PO Acceptance:
Supplier indicates acceptance of PO for fulfillment.

Attachments: None
Acknowledged:
Assigned to:

Shipping

Ship-To Address: 21255 76th Avenue S.
Kent, WA 98032-2442
United States
Location Code: Blue 10-02
Attn: Requester 02

Terms: None

Lines

[Advanced](#) [Sort by](#) Line Number: 0 -- 9 ▾



COUPA SUPPLIER PORTAL & SAN (EMAIL)

PO AND INVOICE TRANSACTIONS

Coupa Supplier Portal & SAN (Email)

TRANSACTIONS IN COUPA VIA EMAIL

- With the help of Coupa, suppliers will be able to quickly receive and acknowledge POs via email
- As the supplier, you will have the ability to act directly from your email inbox when you receive a purchase order (PO) notification email
- The notification email will include action buttons you will be able to act on, including:
 - o Acknowledge the PO
 - o Add a comment to the PO
 - o Create an invoice from the PO (PO Flip)
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these supplier actionable notifications via email



Coupa Supplier Portal & SAN (Email)

EMAIL AND THE COUPA SUPPLIER PORTAL ARE LINKED

- You will be notified of your Purchase Order from Blue Origin via email AND the Coupa Supplier Portal
- Suppliers will receive an email notification and a Coupa Supplier notification for every Purchase Order that is sent from Blue Origin
- Suppliers can click on **View Order** in the email notification to review the order in the Coupa Supplier Portal


The image shows two side-by-side screenshots. The left screenshot is an email notification from Blue Origin, LLC. It includes the subject line 'BLUE ORIGIN Blue Origin, LLC Purchase Order #10204854', a 'View Order' button, and order details: Submitted By: Requester 02, On Behalf Of: Requester 02, Supplier: Testco, Inc., Total: 172.00, and Items: 1238Aa-3200 (4 Each @ 43.00 = 172.00 USD). The right screenshot is the Coupa Supplier Portal interface for Purchase Order #10204854. It displays the status 'Issued - Sent via Email', order date '07/14/20', revision date '07/14/20', requester 'Requester 02', and email 'BlueUAT002@gmail.com'. It also shows shipping information: 'Ship-To Address' 21255 76th Avenue S, Kent, WA 98032-2442, United States, Location Code: Blue 10-02, and Attn: Requester 02. The interface includes sections for 'Attachments', 'Acknowledged', and 'Assigned to', along with a 'Lines' table at the bottom.

Coupa Supplier Portal & SAN (Email)


PURCHASE ORDER TRANSACTIONS & ACTIVITY - EMAIL

- Purchase Orders will be emailed to the PO email that is configured in Blue Origin's Coupa environment
- These emailed POs will show as Coupa Notification in your email inbox

New PO Inbox x

 **Blue Origin, LLC** <do_not_reply@blueorigin-test.coupa.com> to me ▾

BLUE ORIGIN Blue Origin, LLC Purchase Order #10204854

Powered by 

Hi Supplier,
You have received a new purchase order #10204854 from Blue Origin, LLC Company.

Submitted By Requester 02
On Behalf Of Requester 02
Supplier Testco, Inc.
Total **172.00**
Items **1238Aa-3200** 4 Each @ 43.00 **172.00** USD

[View Order](#)

More Detail

PO ID 10204854	Department None
Status Issued - Sent via Email	Last Opened None
Order Date 07/14/20	Acknowledged At None
Revision Date 07/14/20	Payment Term None
Req # 212389	Shipping Method None

Supplier	Shipping
Testco, Inc. 1425 Upgrade street 1425 Upgrade street2 San Mateo, CA 11111 United States bluesuppliertest@gmail.com	21255 76th Avenue S. Kent, WA 98032-2442 United States Location Code: Blue 10-02 Attn: Requester 02

Lines

4 EA **1238Aa-3200** for **172.00**
Supplier Testco, Inc. • Delivery Date 07/28/20 • Commodity Administrative Supplies • Account 01-101F703-101F703.7002.7000.
0000-Administrative Supplies-71-10-01-00-000

Total 172.00 USD

Note POs will be issued to a unique PO email address confirmed by the suppliers OR to the primary contact email address on file is a separate PO email has not yet been identified.

Coupa Supplier Portal & SAN (Email)

ACKNOWLEDGE A PURCHASE ORDER - EMAIL

- In the PO notification email, click on **Acknowledge PO** to notify Blue Origin that you have received the Purchase Order
- The Coupa Supplier Portal will open in a new tab providing a message that confirms the Purchase Order has been acknowledged

The image shows two overlapping screenshots. The left screenshot is an email from Blue Origin, LLC regarding Purchase Order #10204854. It features a 'BLUE ORIGIN' logo and a 'Powered by Coupa' logo. Below the header are three buttons: 'Create Invoice' (blue), 'Acknowledge PO' (grey, highlighted with a red border), and 'Add Comment' (grey). There is also a 'Login' button and a 'View PO' link.

The right screenshot is the Coupa Supplier Portal page for Purchase Order #10204854. It displays a green notification bar at the top that says 'Order acknowledged'. The page lists various details for the purchase order, including status, dates, requester information, and shipping details. A 'Shipping' section is also visible, providing the ship-to address and terms.

Blue Origin, LLC Purchase Order #10204854 Inbox x

Blue Origin, LLC <do_not_reply@blueorigin-test.coupahost.com>
to me ▾

BLUE ORIGIN Blue Origin, LLC Purchase Order #10204854

Powered by **COUPA**

Create Invoice **Acknowledge PO** **Add Comment**

View PO

Login

Purchase Order #10204854

Order acknowledged [X]

Status Issued - Sent via Email

Order Date 07/14/20

Revision Date 07/14/20

Requester Requester 02

Email BlueUAT002@gmail.com

Payment Term None

PO Hold None

WORK PERFORMED None:
UNDER THIS ORDER
SUBJECT TO THE
TERMS AND
CONDITIONS OF THE
FOLLOWING
AGREEMENTS:

Pay Vendor Number None

PO Acceptance
Supplier indicates acceptance of PO for fulfillment.

Attachments None

Acknowledged

Shipping

Ship-To Address 21255 76th Avenue S.
Kent, WA 98032-2442
United States
Location Code: Blue 10-02
Attn: Requester 02

Terms None

Coupa Supplier Portal & SAN (Email)

ACKNOWLEDGE A PURCHASE ORDER - CSP

Regardless of whether you use SAN via email, the Purchase Orders will be captured and available in the CSP

1. Click on the Purchase Order Number to view the PO details
2. At the Header of the Purchase Order, select the **Acknowledged** checkbox to acknowledge the Purchase Order & notify Blue Origin that the Purchase Order has been received
3. You are able to print the PO by scrolling to the PO footer and selecting **Print View**.

The screenshot illustrates the process of acknowledging a purchase order in the Coupa Supplier Portal. It is divided into three numbered steps:

- Step 1:** The user is on the 'Purchase Orders' page. A table lists purchase orders, with the first one highlighted: PO Number 10204854, Order Date 07/14/20, Status Issued, Acknowledged At 07/14/20, and Items 4 Each of 1238Ae 3200. A blue box highlights the 'View' button next to this row.
- Step 2:** The user clicks on the purchase order number, opening a detailed view for 'Purchase Order #10204854'. A green banner at the top says 'Order acknowledged'. The 'Acknowledged' checkbox at the bottom is checked. A blue box highlights this checkbox.
- Step 3:** The user scrolls to the bottom of the page. A blue box highlights the 'Print View' button, which is part of a group of buttons including 'Create Invoice' and 'Save'.

The detailed view of the purchase order includes the following information:

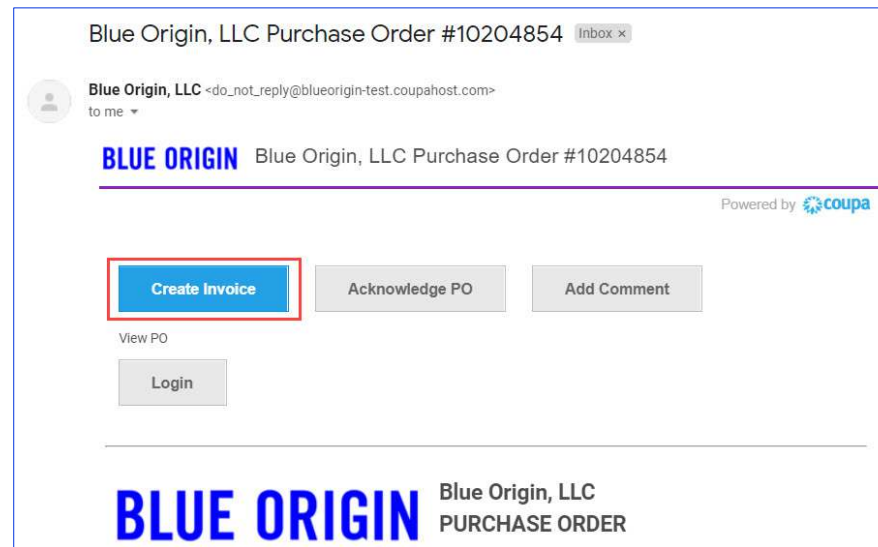
- Status:** Issued - Sent via Email
- Order Date:** 07/14/20
- Revision Date:** 07/14/20
- Requester:** Requester 02
- Email:** DivaJAT002@gmail.com
- Payment Term:** None
- PO Hold:** None
- PO Acceptance:** (Supplier indicates acceptance of PO for fulfillment)
- Attachments:** None
- Acknowledged:**
- Shipping:** Ship-to Address: 21255 78th Avenue S, Kent, WA 98032-2442, United States, Location Code: Dllac 10-02, Attn: Requester 02, Terms: None
- Table:**

Qty	Unit	Price	Total	Invoiced
4	Each	43.00	172.00	0.00
- Total:** 172.00 USD

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - EMAIL

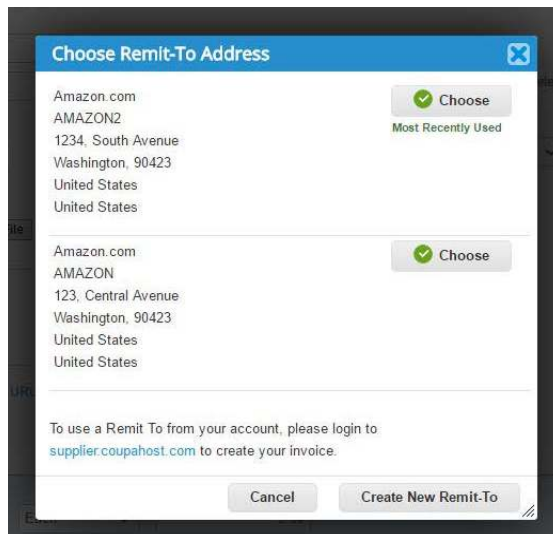
- Suppliers are able to create invoices, or flip a PO into an Invoice, directly from the Purchase Order notification received via email
- Locate the PO you wish to flip to an invoice in your email inbox
- Click on the **Create Invoice** action button on the Purchase Order



Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - EMAIL

- The page will refresh to display the create invoice screen
- If you have more than one Remit-To address, the **Choose Remit-To Address** popup will display
 - *Note*** If there is only one Remit-To address for your company, Coupa will default to that Remit-To address
- If the correct Remit-To is not displaying, click on the **Create New Remit-To** button



Note If you do create a new Remit-To address, the invoice will be placed in **On Hold** status and will need to be reviewed and approved by the Blue Origin Accounts Payable Team

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - EMAIL

- In the invoice creation window, complete all necessary information (all required fields are indicated with an asterisk)
- Use your own invoice numbering convention for the Invoice # field
- Attach your organization's invoice file in the attachment / image box
- Verify auto populated invoice information at the header and line level and adjust as necessary
- Details from the PO are automatically populated to the invoice draft. Select **Red X** to remove PO lines not ready for invoicing. Invoice voucher in Coupa should match your invoice attached.
- If applicable, add any shipping, handling, and tax information
 - You can add applicable tax in the proper section by one of the following methods:
 1. Select a tax code from the Tax Code dropdown and click Calculate
 2. Manually enter a tax percentage
 3. Manually enter a tax amount (\$)
 - Click Calculate to update the invoice total after all additional charges are added
 - Enter any necessary comments Blue Origin, then click Add Comment

The screenshot displays the 'Lines' section of the Coupa Supplier Portal. It features a table with the following data:

Type	Description	Qty	UOM	Price	
	Services - Facility Maint	2.00	Bag	.42.00	84.00

Below the table, there are fields for 'PO Line' (10204882-1), 'Contract', and 'Supplier Part Number'. A 'Billing' section contains a long alphanumeric string. An 'Add Tag' button is visible at the bottom left of the 'Lines' section.

The 'Totals & Taxes' section is overlaid on the right side of the 'Lines' section. It shows the following summary:

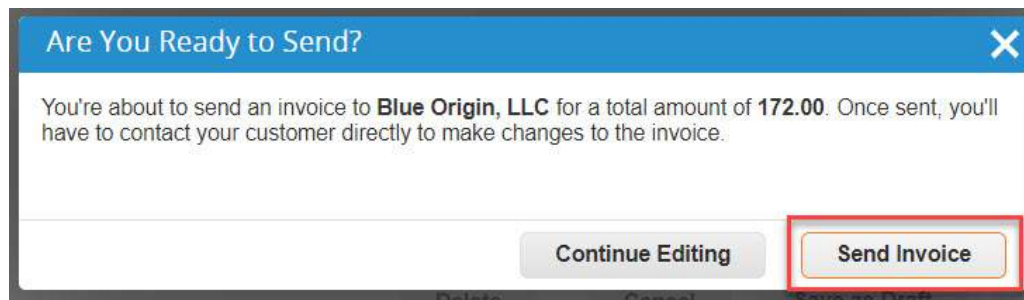
Totals & Taxes	
Lines Net Total	84.00
Shipping	
Handling	
Misc	
Tax	0.000 % 0.000
Total Tax	0.00
Net Total	84.00
Total	84.00

At the bottom of the 'Totals & Taxes' section, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'.

Coupa Supplier Portal & SAN (Email)


INVOICE CREATION - EMAIL

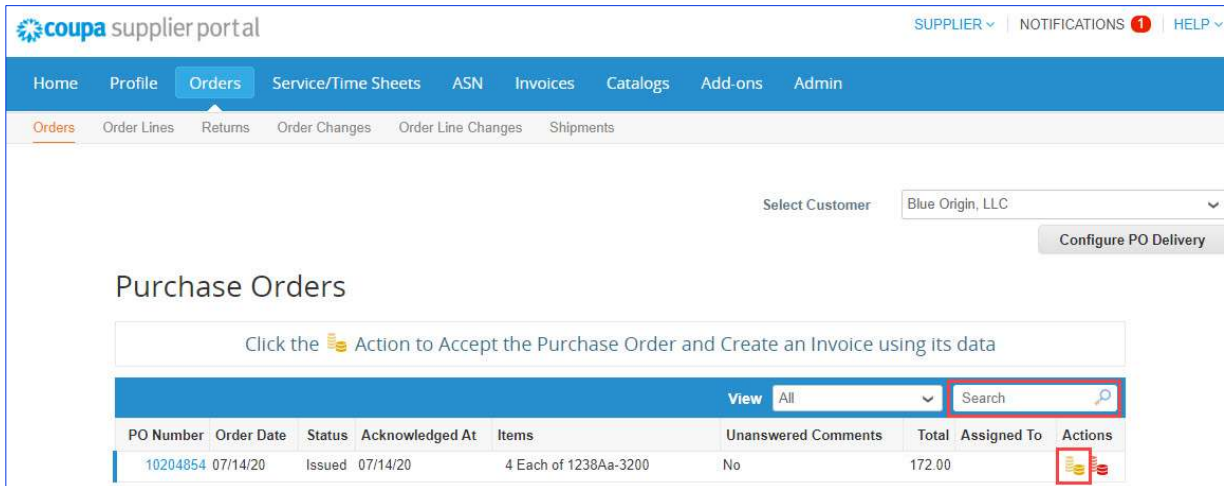
- Once all the information on the invoice is completed, click on **Submit**
- Once you click on **Submit**, a note will appear to confirm you are ready to send the invoice to Blue Origin. Please keep in mind that invoices cannot be changed via email once it has been submitted.
- You have an option to **Continue Editing** if there is additional information needed
- Click on **Send Invoice** to send the completed invoice to Blue Origin
- If the Invoice Number exceeds 15 characters, you will receive a notification message from Blue Origin that warns the user about submitting an invoice with an invoice number exceeding 15 characters. ***Note*** We understand your invoice number is tied to your ERP system - this note is targeted for users creating internal invoices





Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- Suppliers have the option to flip a Purchase Order to an Invoice directly in the Coupa Supplier Portal
- Navigate to the **Orders** tab from the CSP Homepage
- Search for the PO number, you would like to flip to an invoice, in the search bar
- Under the **Actions** column of the specific PO row, select the  icon to create an invoice



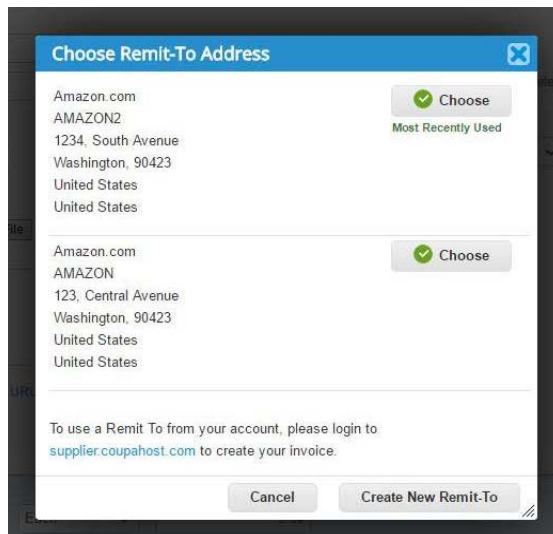
The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following tabs: Home, Profile, **Orders**, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, there is a sub-navigation bar with the following tabs: **Orders**, Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. The main content area is titled "Purchase Orders" and includes a "Select Customer" dropdown menu set to "Blue Origin, LLC" and a "Configure PO Delivery" button. Below this, there is a search bar and a "View" dropdown menu set to "All". A table of Purchase Orders is displayed with the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row of the table is highlighted in blue and contains the following data: PO Number: 10204854, Order Date: 07/14/20, Status: Issued, Acknowledged At: 07/14/20, Items: 4 Each of 1238Aa-3200, Unanswered Comments: No, Total: 172.00, and Actions: . A red box highlights the search bar and the Actions column of the first row.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
10204854	07/14/20	Issued	07/14/20	4 Each of 1238Aa-3200	No	172.00		

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- The page will refresh to display the create invoice screen
- If you have more than one Remit-To address, the **Choose Remit-To Address** popup will display
 - *Note*** If there is only one Remit-To address for your company, Coupa will default to that Remit-To address
- If the correct Remit-To is not displaying, click on the **Create New Remit-To** button



Note If you do create a new Remit-To address, the invoice will be placed in **On Hold** status and will need to be reviewed and approved by the Blue Origin Accounts Payable Team

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- In the invoice creation window, complete all necessary information (all required fields are indicated with an asterisk)
 - Use your own invoice numbering convention for the Invoice # field
 - Attach your organization's invoice file.
 - Verify auto populated invoice information at the header and line level and adjust as necessary
 - Details from the PO are automatically populated to the invoice draft. Select **Red X** to remove PO lines not ready for invoicing. Invoice voucher in Coupa should match your invoice attached.
-
- For a Goods Purchase Order (QTY Based)
 - o Enter the Quantity in the **Quantity** field (this will be auto-populated for a PO-backed invoice)
 - o Enter a price in the **Price** field (this will be auto-populated for a PO-backed invoice)

- For a Services Purchase Order (AMT Based)
 - o Enter a price in the **Price** field (this will be auto-populated for a PO-backed invoice)

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- If applicable, add any shipping, handling and tax information
- You can add applicable tax in the proper section by one of the following methods:
 - o Select a tax code from the **Tax Code** dropdown and click **Calculate**
 - o Manually enter a **tax percentage**
 - o Manually enter a **tax amount (\$)**
- Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Blue Origin and click **Add Comment**

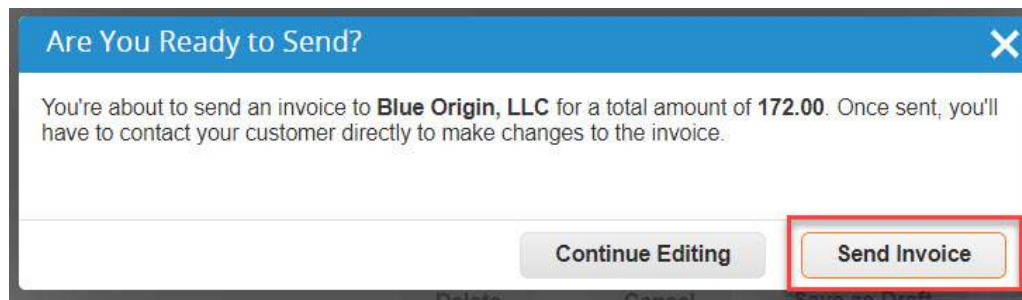
Totals & Taxes

Lines Net Total	84.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> <input type="text"/> % <input type="text"/>
Total Tax	0.00
Net Total	84.00
Total	84.00

Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- Once all the information on the invoice is completed, click on **Submit**
- Once you click on **Submit**, a note will appear to confirm you are ready to send the invoice to Blue Origin. Please keep in mind that invoices cannot be changed via email or CSP once it has been submitted.
- You have an option to **Continue Editing** if there is additional information needed
- Click on **Send Invoice** to send the completed invoice to Blue Origin
- If the Invoice Number exceeds 15 characters, you will receive a notification message from Blue Origin that warns the user about submitting an invoice with an invoice number exceeding 15 characters. ***Note*** We understand your invoice number is tied to your ERP system - this note is targeted for users creating internal invoices



Coupa Supplier Portal & SAN (Email)

INVOICE CREATION - CSP

- Once you submit the invoice, the page will refresh and the status of the invoice will be displayed at the top of the screen in a green ribbon
 - *Note*** If a supplier submits an invoice with a new Remit-To address that does not match what is on record at Blue Origin, the invoice will be put into 'On Hold' status for Blue Origin Account Payable to review and approve
- To view the status of any invoice, click on the **Invoice** tab, search for the invoice and refer to the **Status** column

The screenshot shows the 'Invoices' page in the Coupa Supplier Portal. At the top, there is a green notification banner that reads: 'Testco, Inc. Invoice #INV_TestCO_002 is pending approval'. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below these buttons lists invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row is highlighted in blue and shows 'INV_TestCO_002' with a status of 'Pending Approval' and a total of 4,200.00. The following five rows show 'None' for the invoice number, 'Draft' for the status, and '10204854' for the PO number, with a total of 172.00 for each. Each of these five rows has an 'Actions' column with a pencil icon and a red 'X' icon. At the bottom of the table, it says 'Per page 15 | 45 | 90'.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
INV_TestCO_002	07/14/20	Pending Approval	10204855	4,200.00	No	
None	07/14/20	Draft	10204854	172.00	No	
None	07/14/20	Draft	10204854	172.00	No	
None	07/14/20	Draft	10204854	172.00	No	
None	07/14/20	Draft	10204854	172.00	No	
None	07/14/20	Draft	10204854	172.00	No	

- After the invoice is approved and matched with the PO, the invoice will be paid according to Blue Origin's standard payment terms, or to the payment terms contractually agreed upon between Blue Origin and the supplier. Payment details will be reflected in Coupa, as well as, the CSP

Coupa Supplier Portal & SAN (Email)

INVOICE STATUSES - CSP

- The following is a list of invoice statuses a supplier can view in the Coupa Supplier Portal:
 - o **Draft:** Draft/incomplete invoice that has not yet been submitted
 - o **Processing:** Invoice that is between supplier submission and the submitted invoice being recorded in Blue Origin's Coupa environment
 - o **Pending Approval:** Invoice that is in the process of review prior to final approval and or receipt of deliverable
 - o **On Hold:** Remit-To Address does not match what is on record at Blue Origin and must be reviewed and approved by the Blue Origin Accounts Payable team before invoice processing can resume
 - o **Disputed:** Invoice that is currently being disputed by Blue Origin
 - o **Approved:** Invoice that is approved and processed for payment as per the payment terms
 - o **Voided:** Invoice that is voided after it has been fully approved and processed for payment

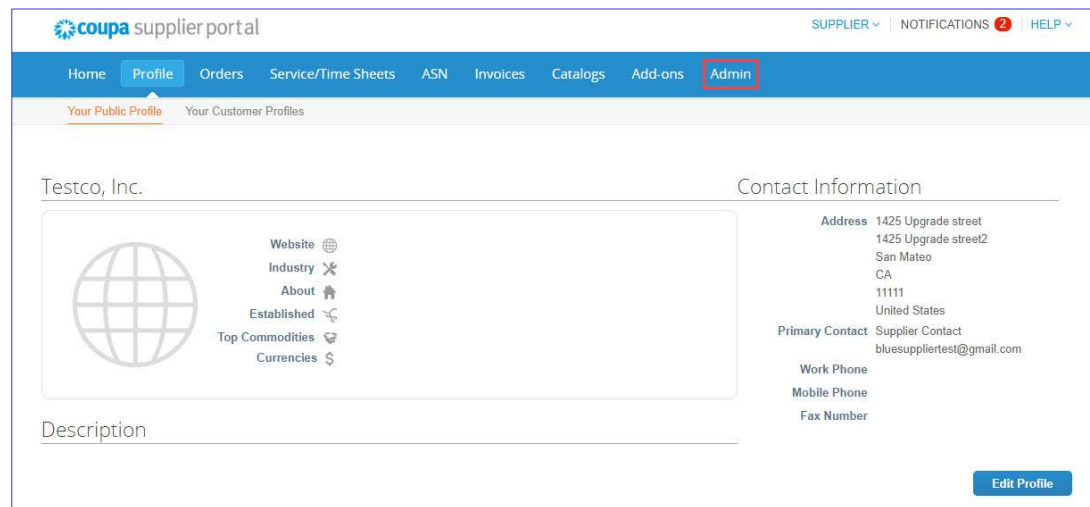


COUPA SUPPLIER PORTAL ADMIN SETUP

Coupa Supplier Portal Admin Setup

UPDATING ADMIN SETTINGS

- Once suppliers receive the email notification to register to the Coupa Supplier Portal, they will have the opportunity to verify and complete their information
- Navigate to the **Admin** tab in the CSP



Coupa Supplier Portal Admin Setup

ADDING USERS

- Supplier admins have the ability to allow additional users to access their Coupa Supplier Portal Account to assist in performing tasks:
 - o Navigate to the **Admin** tab in the CSP
 - o Enter the Employee's email address (required) in the **Invite User** popup window and select **Send Invitation**
 - o Supplier Admins are able to restrict access to specific customers by checking and unchecking customer name boxes in their user table

The screenshot displays the Coupa Supplier Portal Admin interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' tab is selected. Below the navigation bar, the 'Admin Users' page is visible, featuring a table with columns for 'Users', 'Permissions', and 'Customer Access'. A red box highlights the 'Invite User' button in the top right corner of the 'Admin Users' page. A blue box highlights the 'Email' field in the 'Invite User' popup window. The 'Invite User' popup window is open, showing fields for 'First Name', 'Last Name', and 'Email'. Below these fields, there are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has several checkboxes, including 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'Payments', 'Order Changes', and 'Pay Me Now'. The 'Customers' section has checkboxes for 'All' and 'Blue Origin, LLC'. A red box highlights the 'Send Invitation' button at the bottom right of the popup window. A blue arrow points from the 'Send Invitation' button in the popup to the 'Send Invitation' button in the 'Admin Users' page.

Coupa Supplier Portal Admin Setup

EDITING EXISTING USERS

- Supplier admins have the ability to edit and manage individual user access at any time:
 - o Navigate to the **Admin** tab in the CSP
 - o Modify the specific permissions and customer access by checking and unchecking respective boxes in the popup window user table
 - o Supplier Admins also have the ability to deactivate any existing users by selecting the **Deactivate User** button
 - o Select **Save** to save the changes

The screenshot displays the Coupa Supplier Portal Admin interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' tab is selected. The main content area shows the 'Admin Users' section with a table of users. The user 'Supplier Contact' (bluecuppliertest@gmail.com) is highlighted, and the 'Edit' button is visible. A popup window titled 'Edit user access for Supplier Contact' is open, showing the user's information and a detailed permissions section. The permissions are organized into 'Permissions' and 'Customers' categories. The 'Permissions' section includes 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'Payments', 'Order Changes', and 'Pay Me Now'. The 'Customers' section includes 'All' and 'Blue Origin, LLC'. The 'Save' button is highlighted in red in the popup window.

A high-resolution photograph of Earth from space, showing the curvature of the planet and the blue oceans. The text 'NEXT STEPS' is overlaid in a bold, white, sans-serif font. The background is a deep black space filled with numerous small, distant stars. The lighting is dramatic, with a bright glow on the left side of the planet, suggesting the sun is just out of frame.

NEXT STEPS

Next Steps for CSP Enablement

NEXT STEPS

- Coupa Supplier Portal Registration emails will be sent to the Primary Supplier Contacts
- Suppliers will verify information via a Supplier Information Form Request sent from Blue Origin
 - o This Information Request form will be used to verify the information that Blue Origin has on file and give our suppliers an opportunity to make necessary changes to information
- Suppliers should review training materials and communications. Complete requested Supplier Information
- Align with your Account Receivable team regarding invoicing, if you have not already

Key Points

- Coupa centralizes Blue Origin's procure to pay processes, providing our strategic supplier relations several benefits
- Suppliers have expanded online capabilities in a centralized platform where they can: View/Receive/Acknowledge purchase orders, create & send Invoices and view payment status
 - o This Information Request form will be used to verify the information that Blue Origin has on file and give our suppliers an opportunity to make necessary changes to information
- **Supplier Expectations:**
 - o Paperless process – all electronic (suppliers have the ability to print PO's for their respective records)
 - o Information updates are centralized and easy to navigate
 - o For any non PO-backed invoices – suppliers should work with Blue Origin to ensure they are populating the correct Requester Name and Email address
 - o Invoices will be automatically sent for payment when the purchase order amount equals the invoice received or is within the set invoice tolerances that Blue Origin has configured within Coupa. This will ensure timely payment based on established payment terms with each vendor



BLUE ORIGIN
