Coupa Supplier Portal:
Getting Started

11/3/2020

Coupa Supplier Portal

Getting started

- Coupa Supplier Portal (CSP) Overview
- Invitation or Self Registration
- Registration
- Logging Into CSP
- Admin – Invite User
- Notifications Setup
- Merging Accounts
- Legal Entity Setup

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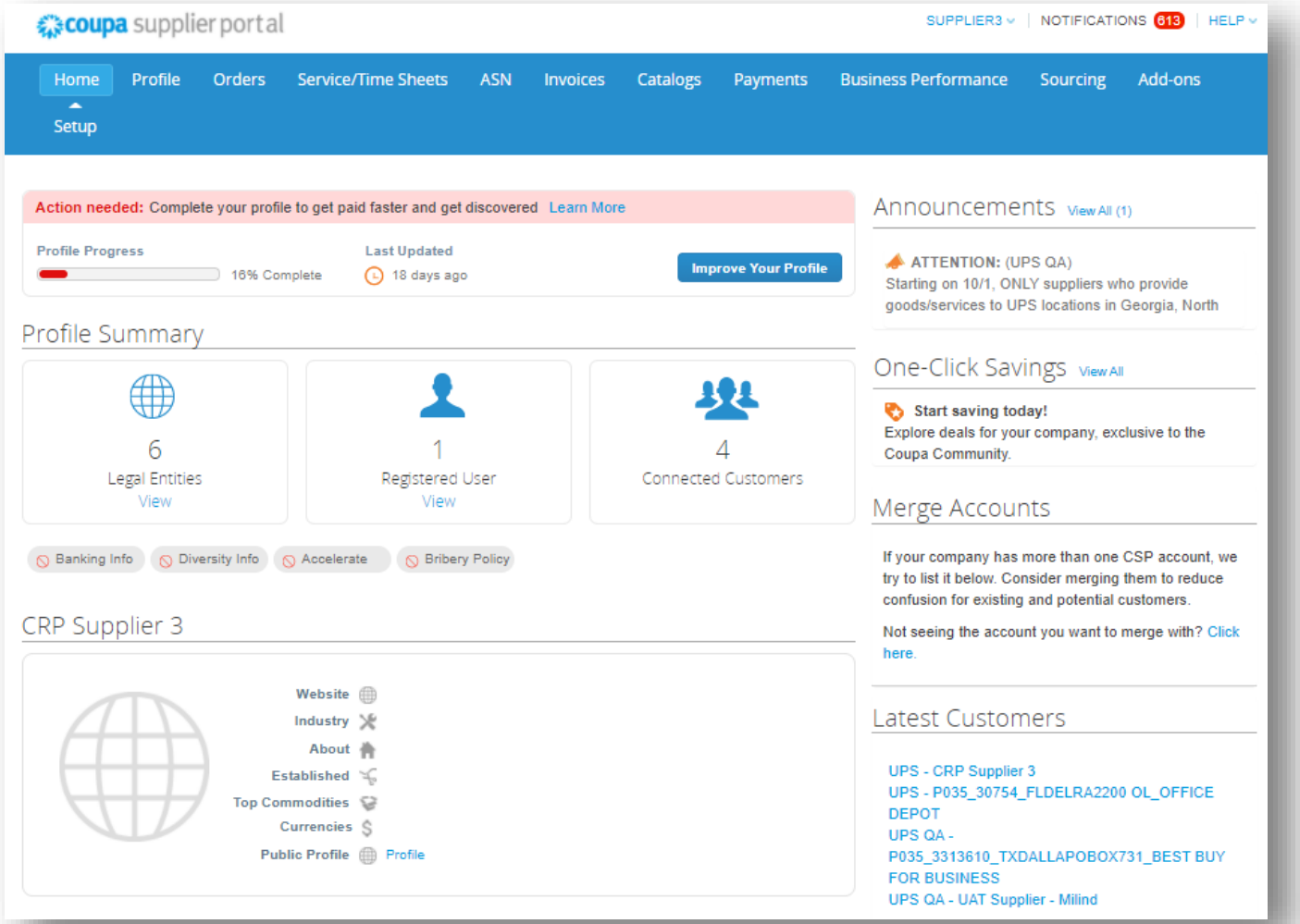
Coupa Supplier Portal – Getting Started

Coupa Supplier Portal (CSP) Overview

- The Coupa Supplier Portal (CSP) is a free tool that allows users to conduct business with UPS.
- Suppliers can manage various content and settings such as:
  - Managing/updating company profile information.
  - Viewing purchase orders.
  - Sending invoices.
- For the best user experience, Google Chrome is the recommended web browser.



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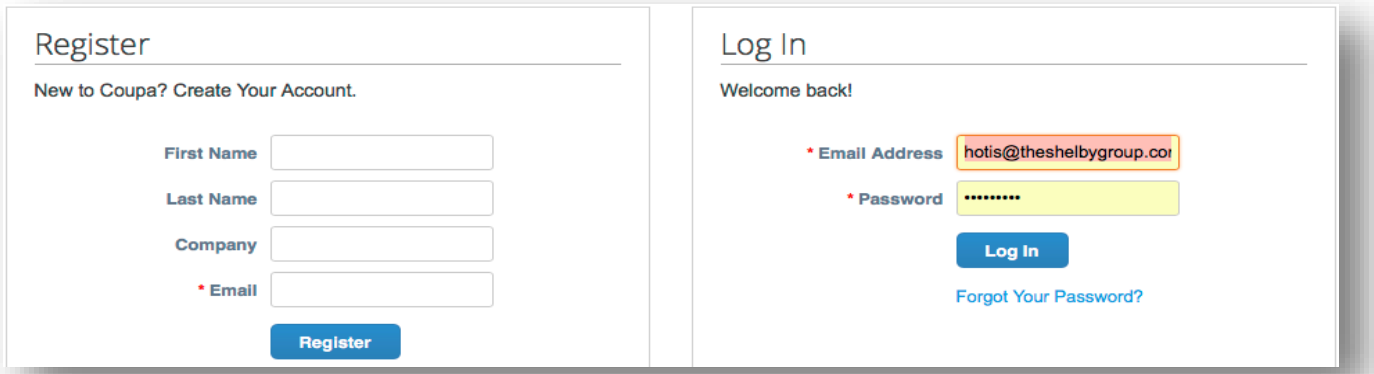
Invitation or Self Registration

Invitation from UPS

- Suppliers will receive an e-mail from our Coupa system with a unique link to join the Coupa Supplier Portal.
- If an invitation is not received, send an e-mail to coupaenablement@ups.com and request an invitation.
- Click the link in the email to be directed to the CSP and register your account.
- Bookmark https://supplier.coupahost.com/ as a favorites link for quick access, to return to the site.

Self-Registration

- Register at: https://supplier.coupahost.com/.
- Once registered, suppliers will appear as Linked in Coupa.
- Need help registering? Please e-mail supplyline@ups.com for assistance.
- Suppliers already on the CSP with another Coupa customer can send the previously used CSP email address to our Supplier Enablement team and they'll do the rest or click the link in CSP located on the home screen.



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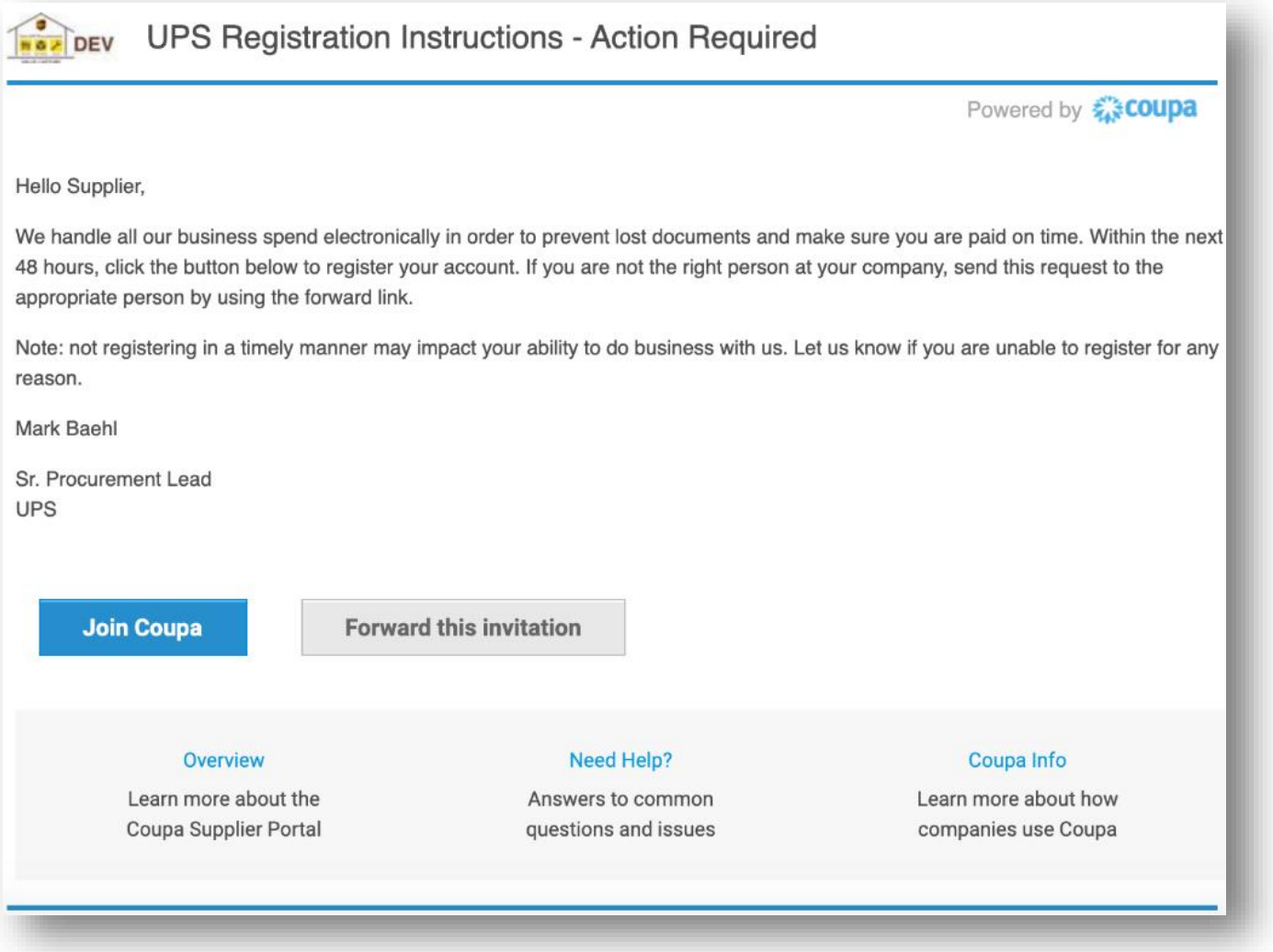
Registration

- Expect to receive a registration email from Coupa.
- The email will present two options – Join Coupa or Forward this Invitation.
- Please click *Join Coupa* to be redirected to the account creation page.



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Logging Into CSP

1. On the account creation page users will be instructed to create a password.
2. If you are not the right person, forward the invite to another user with the same email domain.

   Example: john@ups.com can forward the invite to mary@ups.com, but not mary@coupa.com.

3. Once signed in, additional users can be invited to the CSP by clicking the *Admin* tab and then clicking on *Invite User*.

   Note: If the domain needs to be updated for your company, please email supplyline@ups.com.

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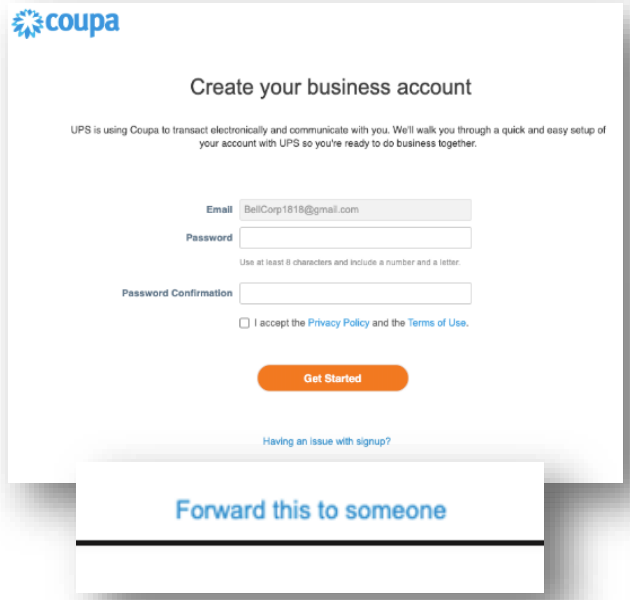

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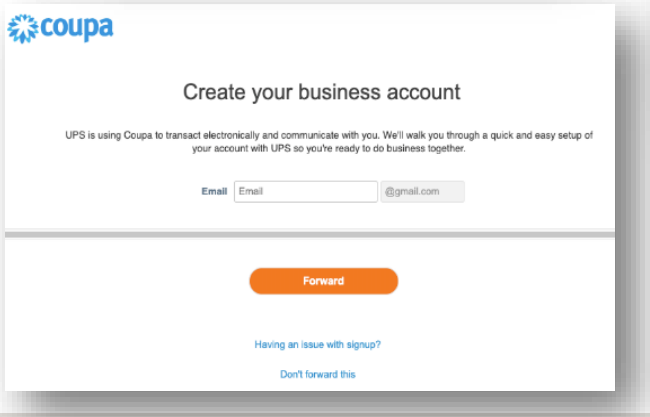

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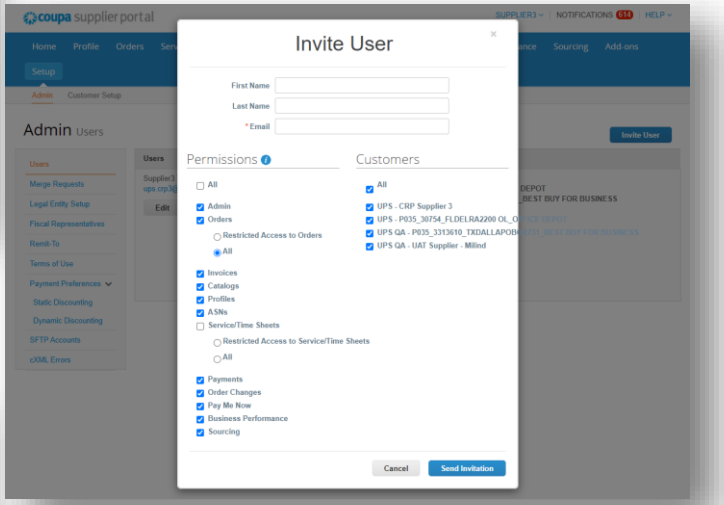

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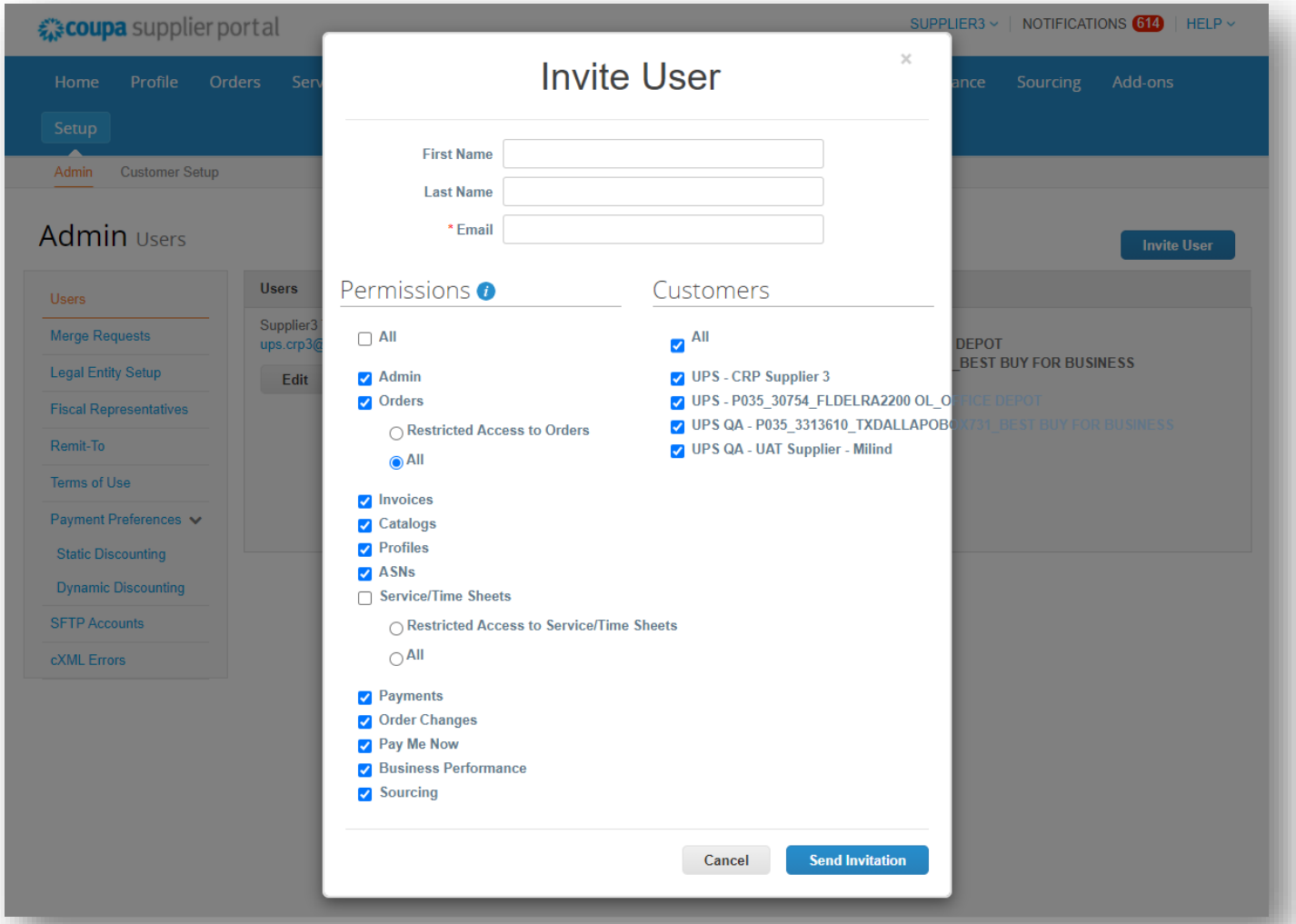
Admin – Invite User

- On the *Invite User* page type the first name, last name and email of the user being invited, in the appropriate fields.
- In the *Permissions* section, select access options for the user being invited.

  Note: UPS does not use the Service/Time Sheets, Order Changes, or Pay Me Now functions in the CSP.

- In the *Customers* section, select the customers the invited user will have access to.
- When complete, click *Send Invitation* and the user will receive an email inviting him/her to access the CSP.



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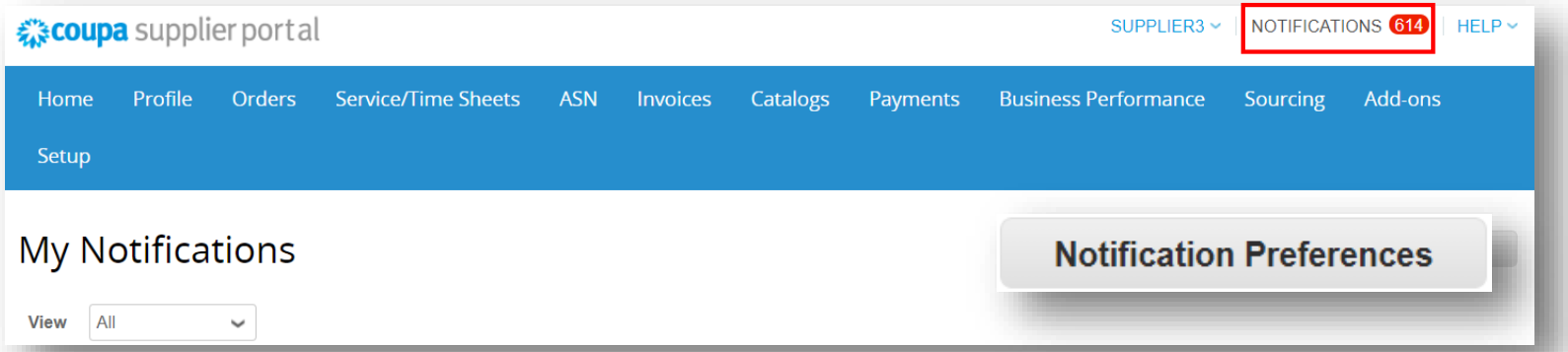
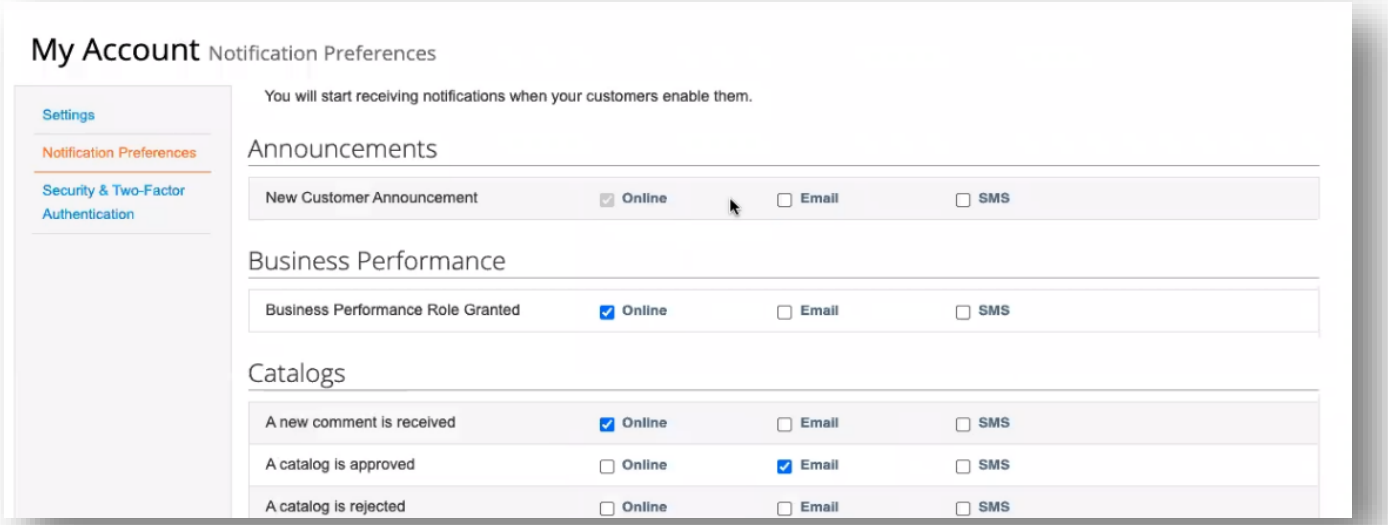
Notifications Setup

- Select *Notifications* in the top right corner to be redirected to the My Notifications screen.
- Click *Notification Preferences* to customize supplier notifications.
- Choose how notifications of functions in the CSP are received – Online, Email, or SMS (text).

  Note: Suppliers will be prompted to set up a phone number in My Account settings. Mobile phone verification will be needed; follow prompts to verify number.





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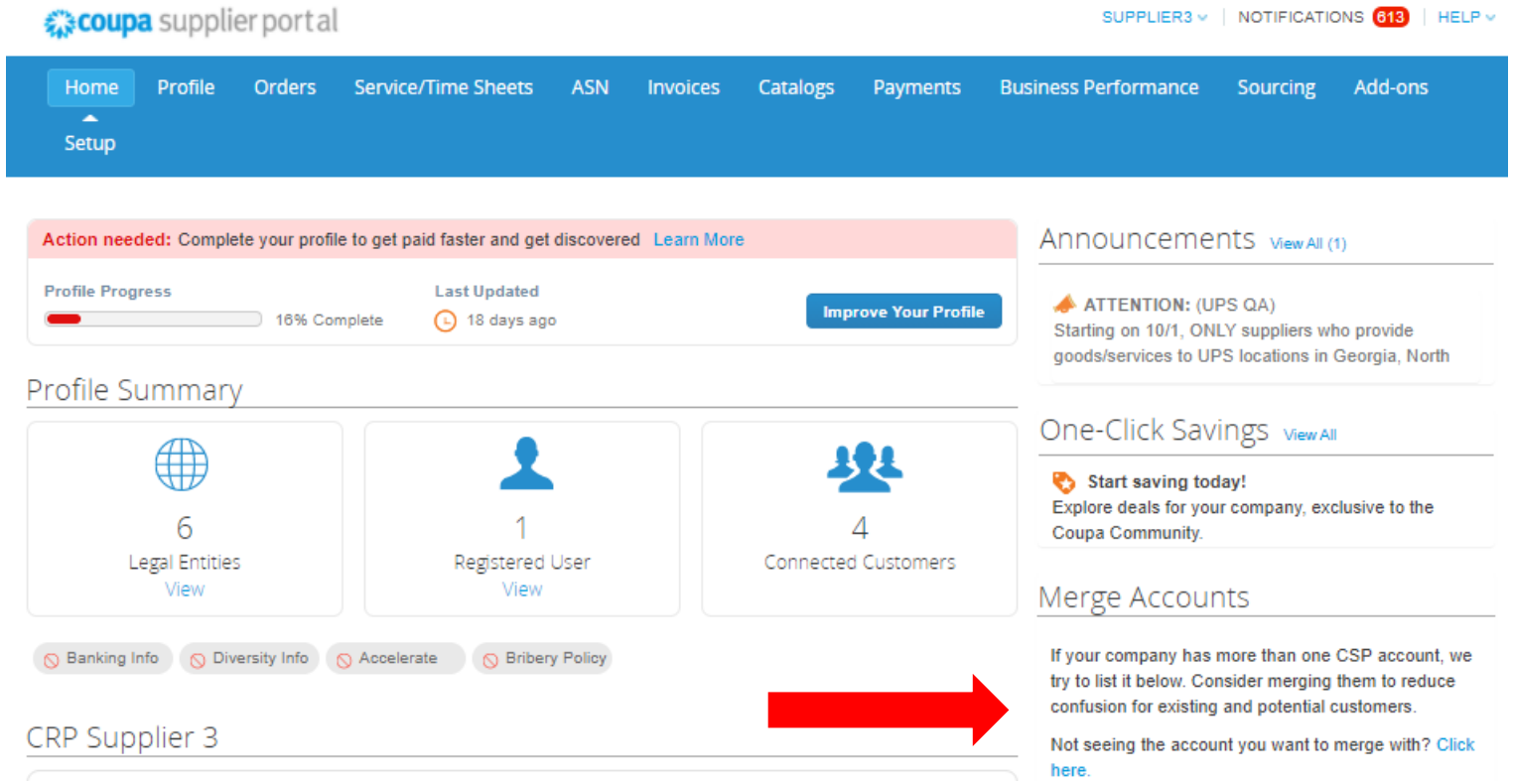
Merging Accounts

- If suppliers are already using the CSP, accounts can be merged to eliminate duplication.
- Click the link in the task menu, to the right of the profile summary to access step-by-step instructions for completing the merge process.
- Please have additional customer account information ready to complete the merge.



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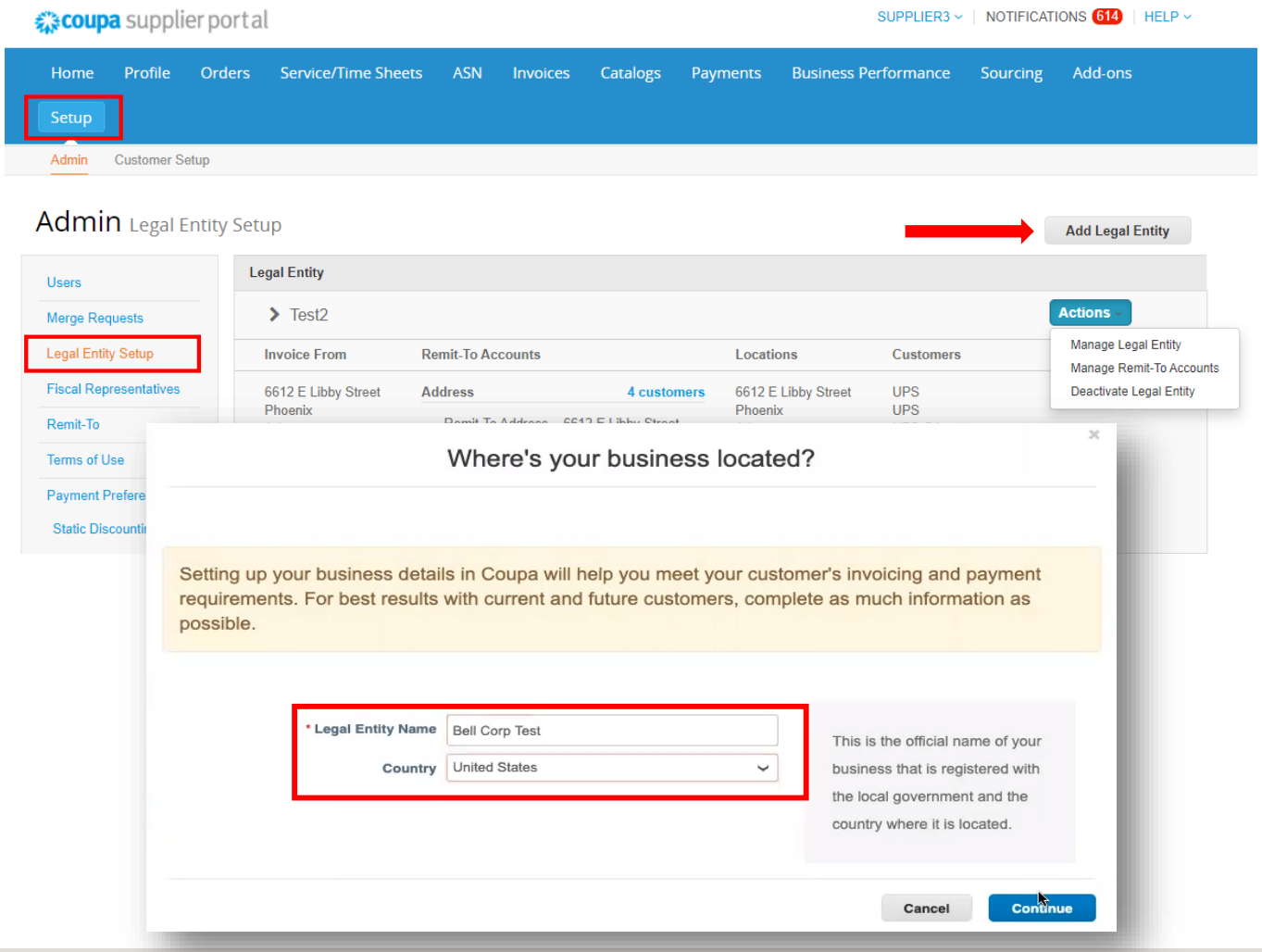
Legal Entity Setup

- Click the *Setup* tab in the navigation bar to be redirected to the *Admin* page.
- Select *Legal Entity Setup* in the left margin.
- To create a new legal entity select, *Add Legal Entity*.
- Enter the legal entity name and country in the corresponding fields.
- Click *Continue*.



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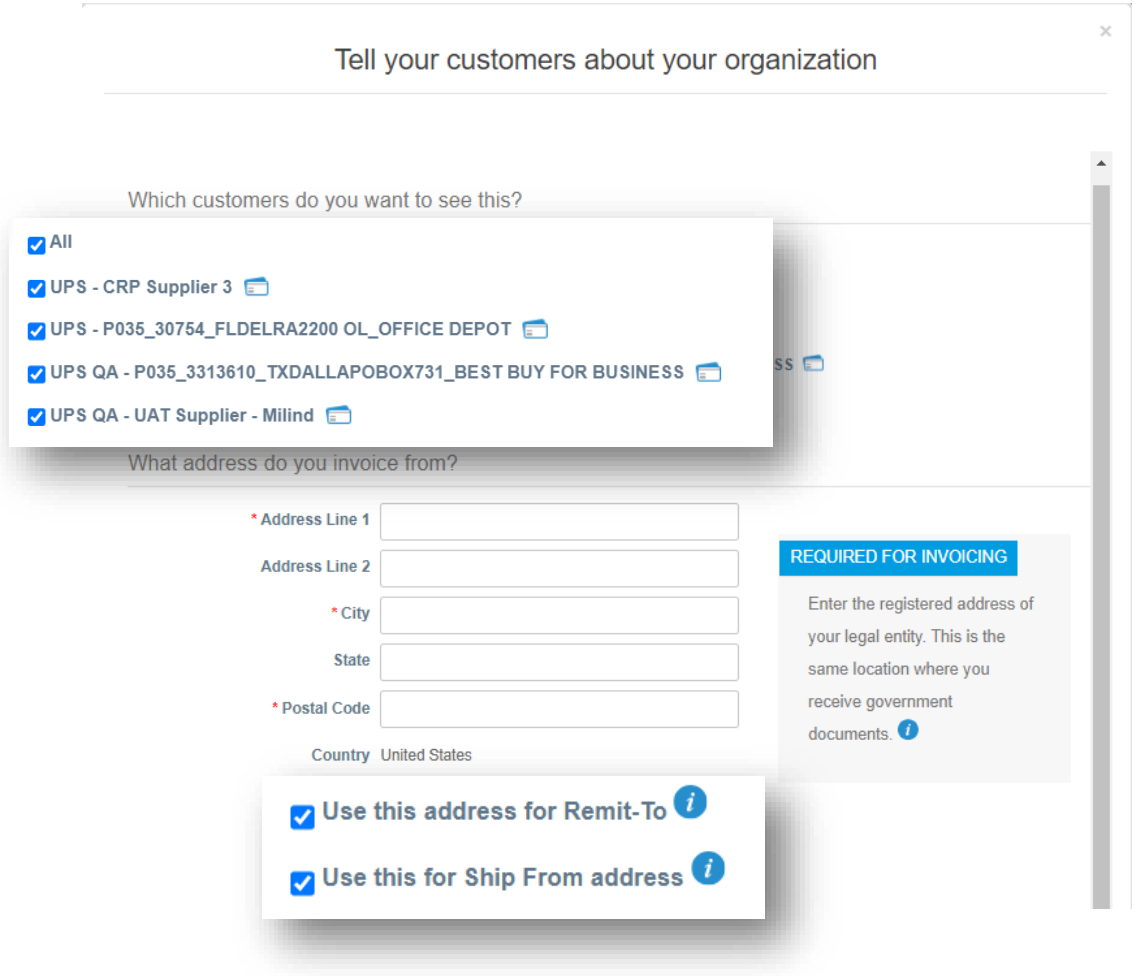
Legal Entity Setup

- On the *Tell your customers about your organization* screen, select the customers that should see your information and enter an invoicing address.
- If the same address will be used as the remit-to and ship from address leave the boxes beneath the address fields checked.
- If a different address will be used for remit-to or ship from, uncheck the appropriate box. Address information for those selections will be added as the set up is completed.



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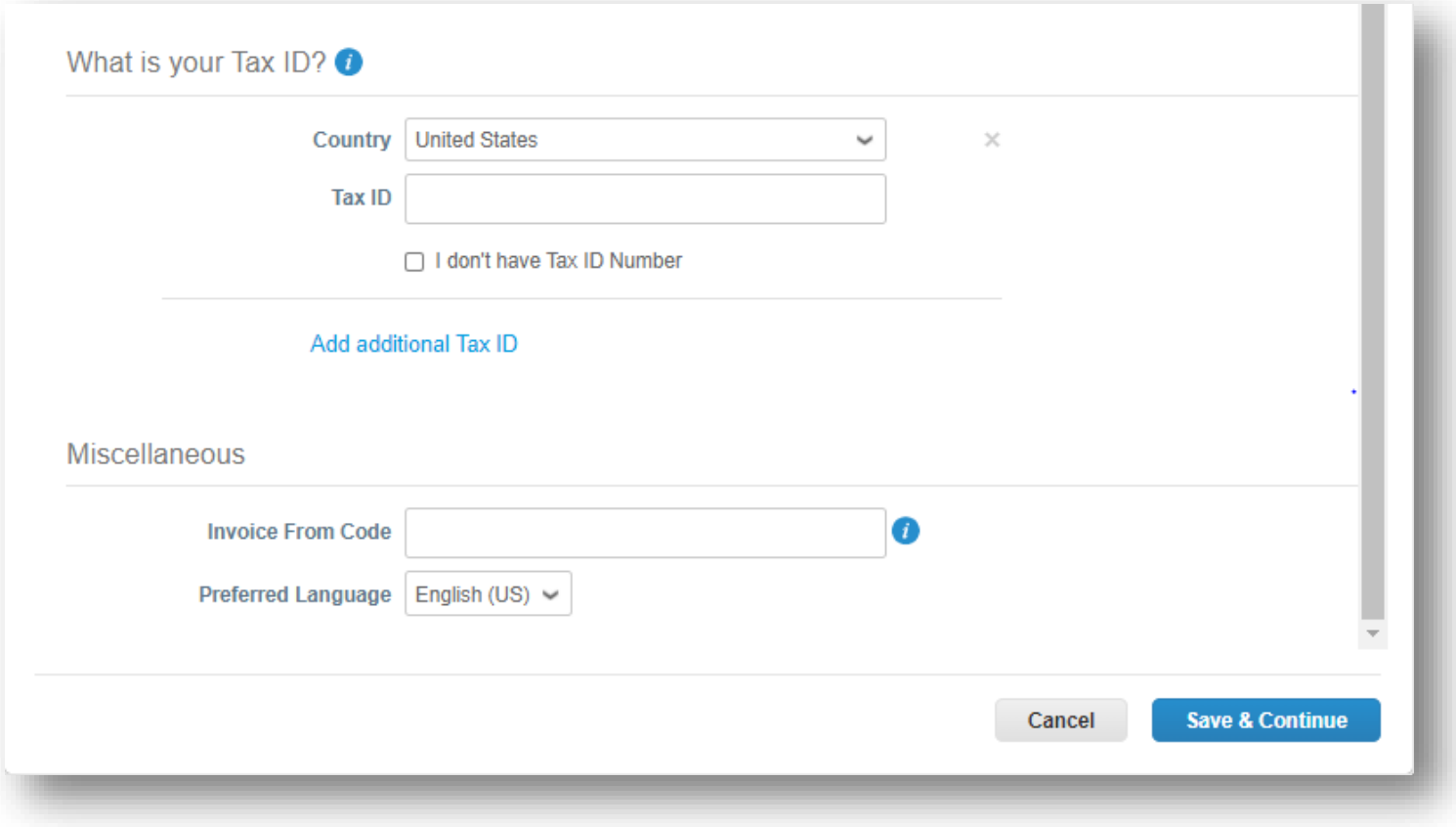
Legal Entity Setup

- Enter *Tax ID*, if applicable.
- The *Invoice From Code* is for used only by suppliers transacting business with UPS via cXML. The code must be obtained from UPS and must be entered correctly. It is not required to set up the legal entity.
- Click *Save & Continue* to continue the setup process.



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Legal Entity Setup

- On the Where do you want to receive payment? Page, select *Address* in the *Payment Type* field.

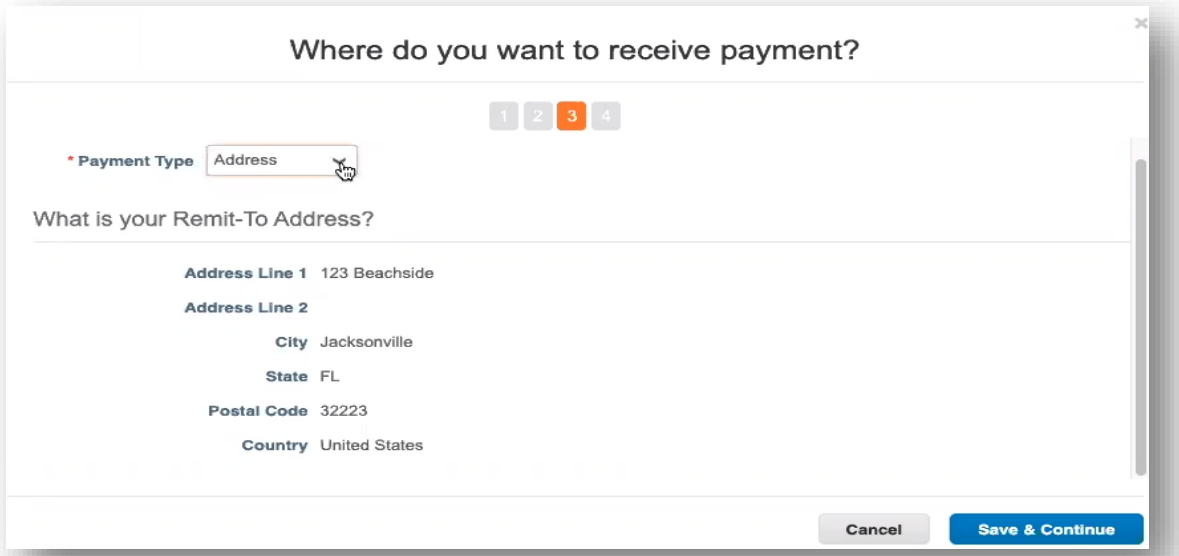
  Note: This is a Coupa-related function that does not affect the way suppliers are paid. Banking information is not stored in Coupa.

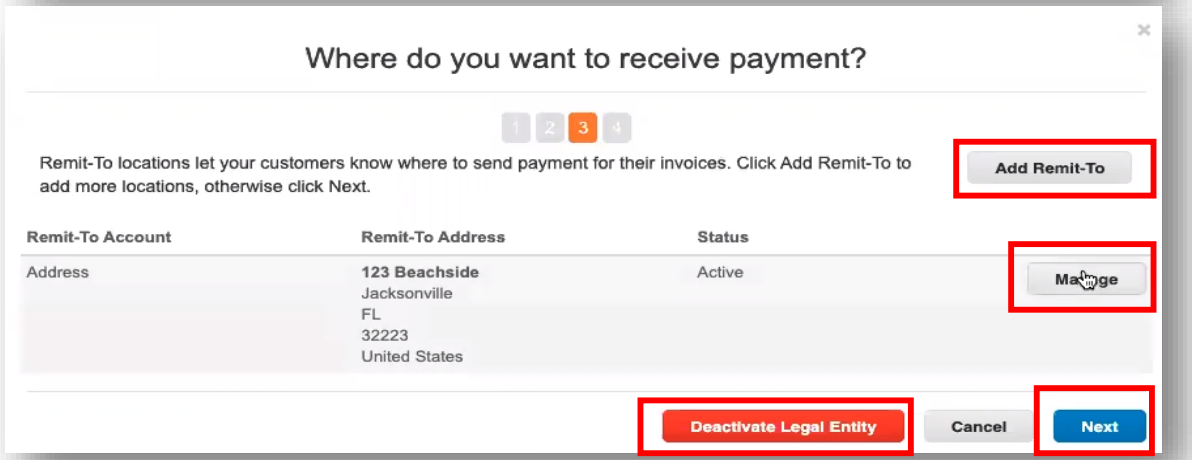
- If the remit-to address differs from the invoicing address, click the *Add Remit-To* button, complete the required fields, then click *Save & Continue*.

- The *Deactivate Legal Entity* button removes the entity from the user's account.

- Clicking the *Manage* button opens a subset of the current page where users can make changes to the customers who can see supplier addresses or to deactivate an invoicing, remit-to, or ship from address.

- Click *Next*.





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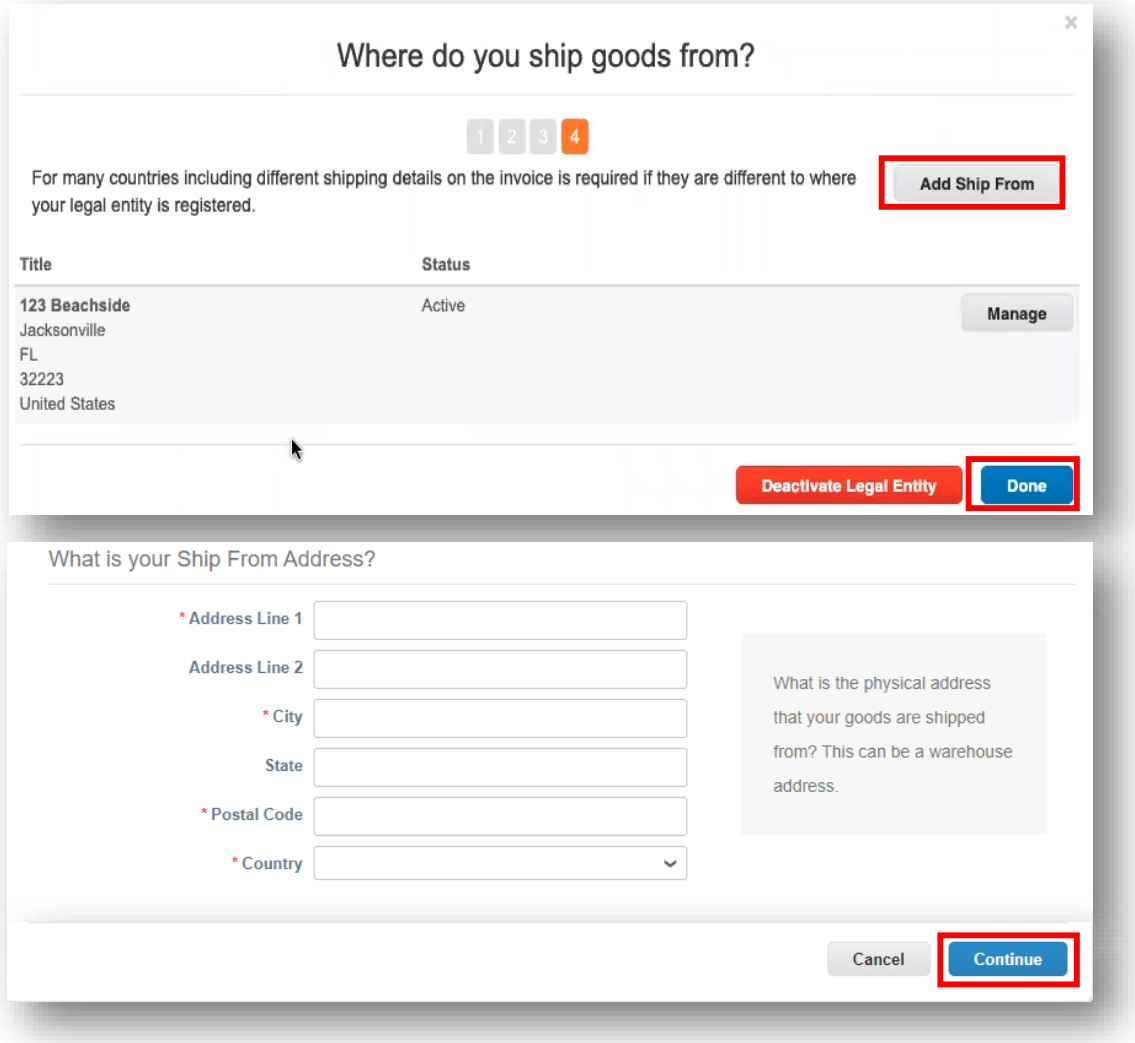
Legal Entity Setup

- If the ship from address differs from the invoicing address, click the *Add Ship From* button then complete the required fields and any preferred optional fields.
- Scroll to the bottom of the page and click *Continue*.
- Review addresses for accuracy – errors in addresses can ultimately delay payment.
- Click *Done* to complete the Legal Entity set up process.



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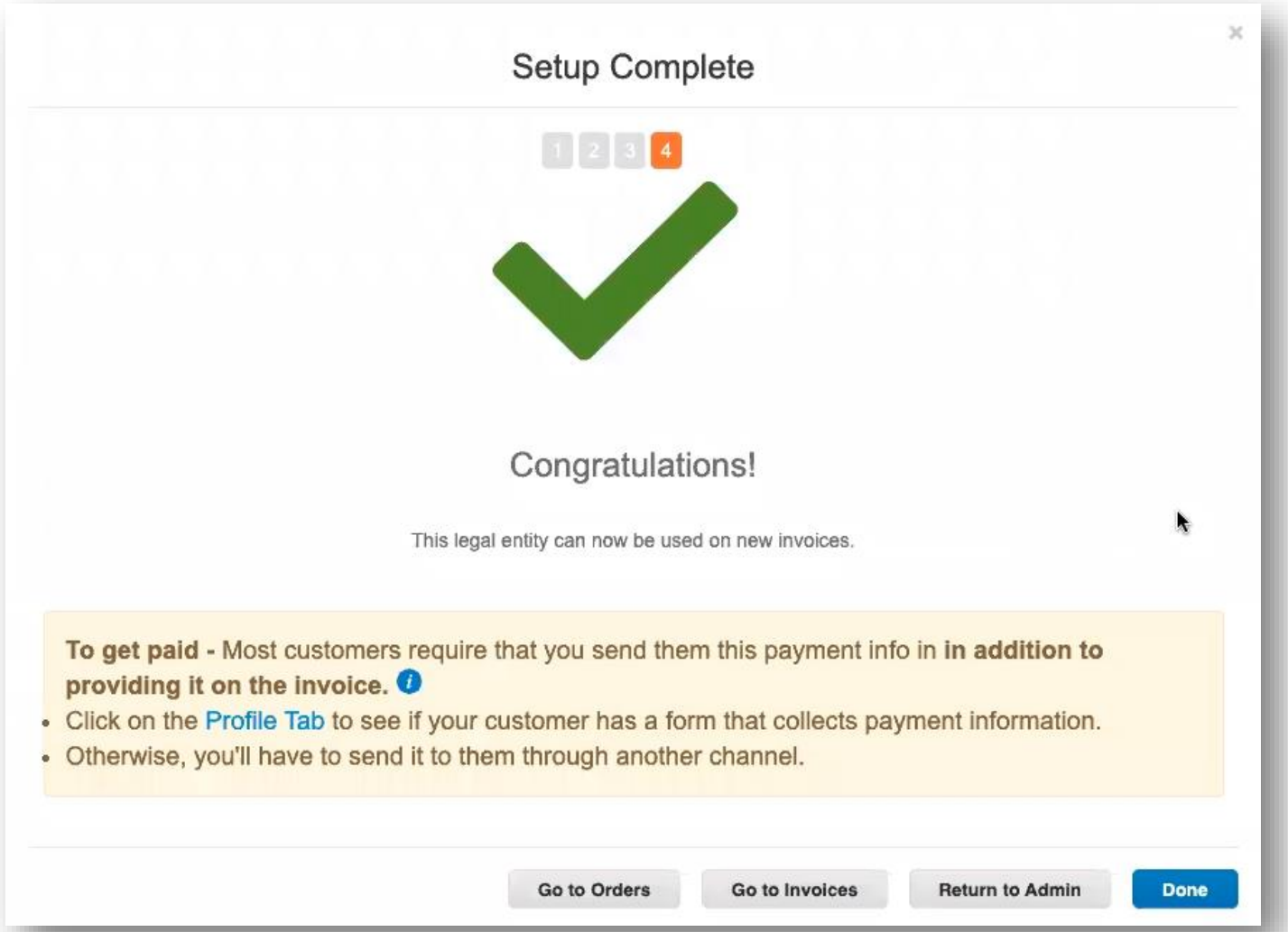
Setup Complete

- Supplier setup is now complete and invoice processing can begin.
- Need assistance? Got questions? Email supplyline@ups.com.



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