

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](#)

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.

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, it shows 'SUPPLIER3', 'NOTIFICATIONS 013', and 'HELP'. Below the navigation bar, there is a menu with options: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. A 'Setup' link is also visible.

A prominent red banner at the top of the main content area reads: 'Action needed: Complete your profile to get paid faster and get discovered Learn More'. Below this, a 'Profile Progress' section shows a progress bar at 16% Complete and 'Last Updated' 18 days ago, with an 'Improve Your Profile' button.

The 'Profile Summary' section features three main cards: '6 Legal Entities View', '1 Registered User View', and '4 Connected Customers'. Below these are smaller cards for 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'.

The 'CRP Supplier 3' section includes a globe icon and a list of links: Website, Industry, About, Established, Top Commodities, Currencies, and Public Profile Profile.

On the right side, there are three announcement sections: 'Announcements View All (1)' with an 'ATTENTION: (UPS QA)' notice, 'One-Click Savings View All' with a 'Start saving today!' notice, and 'Merge Accounts' with a notice about merging CSP accounts. At the bottom right, there is a 'Latest Customers' section listing several UPS-related suppliers.

Coupa Supplier Portal – Getting Started

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

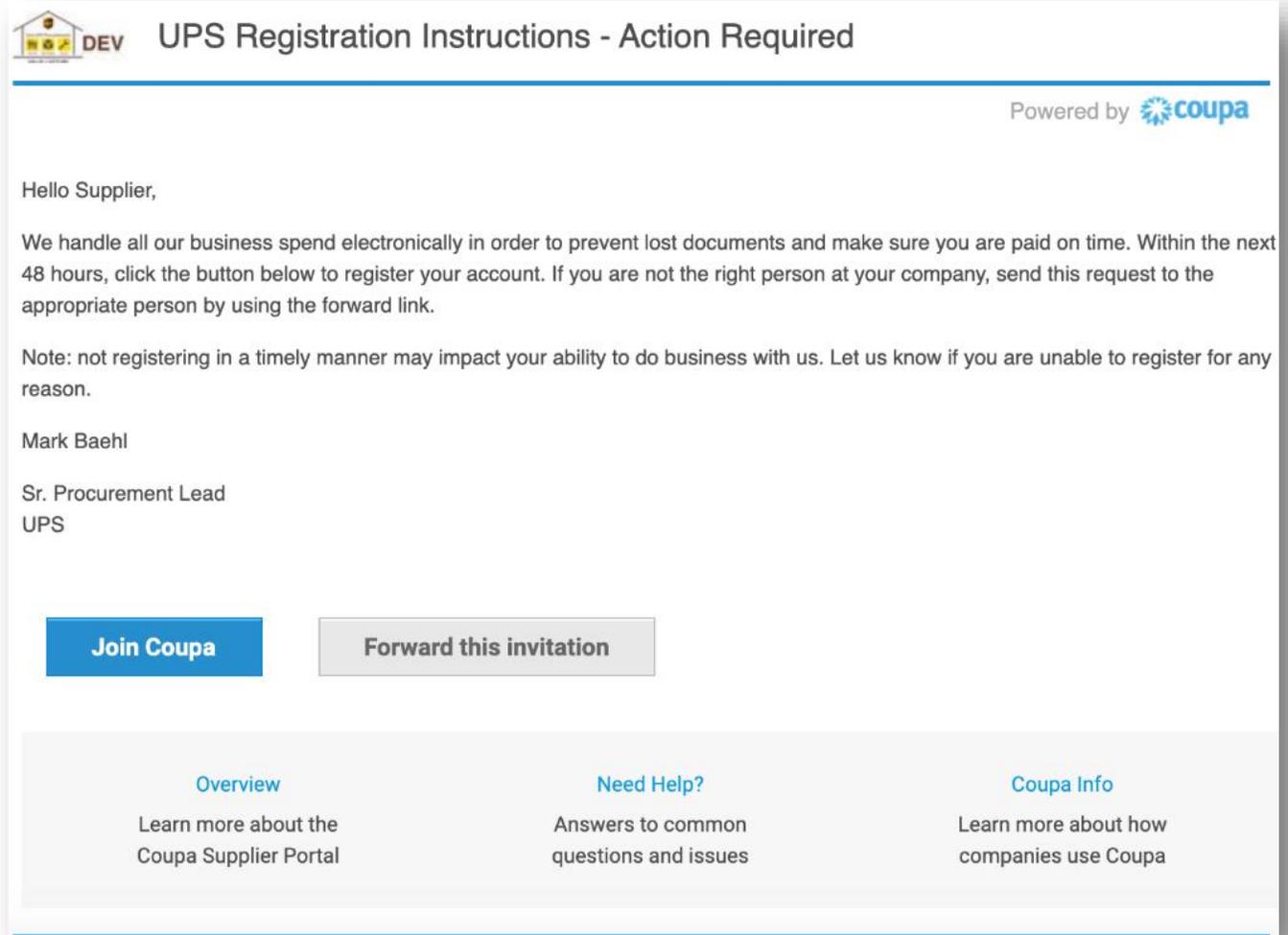
- Register at: <https://supplier.coupahost.com/>.
- Once registered, suppliers will appear as Linked in Coupa.
- Need help registering? Please e-mail supplyline@ups.com for assistance.
- Suppliers already on the CSP with another Coupa customer can send the previously used CSP email address to our Supplier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

The image shows two side-by-side screenshots of the Coupa Supplier Portal interface. The left screenshot is the 'Register' page, titled 'New to Coupa? Create Your Account.' It features four input fields: 'First Name', 'Last Name', 'Company', and 'Email'. Below the fields is a blue 'Register' button. The right screenshot is the 'Log In' page, titled 'Welcome back!'. It has two input fields: 'Email Address' (containing 'hotis@theshelbygroup.coi') and 'Password' (containing masked characters). Below the fields is a blue 'Log In' button and a link for 'Forgot Your Password?'.

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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.



 UPS Registration Instructions - Action Required

Powered by 

Hello Supplier,

We handle all our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.

Mark Baehl
Sr. Procurement Lead
UPS

[Join Coupa](#) [Forward this invitation](#)

[Overview](#)
Learn more about the Coupa Supplier Portal

[Need Help?](#)
Answers to common questions and issues

[Coupa Info](#)
Learn more about how companies use Coupa

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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.

1 

Create your business account

UPS is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with UPS so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Get Started

[Having an issue with signup?](#)

Forward this to someone

2 

Create your business account

UPS is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with UPS so you're ready to do business together.

Email

Forward

[Having an issue with signup?](#)

[Don't forward this](#)

3

Invite User

First Name

Last Name

* Email

Permissions **Admin** Customers

All Admin UPS - CRP Supplier 3

Restricted Access to Orders UPS - P035_30754_FLDELRA290_OIL...

All Invoices UPS QA - P035_3313619_TXDALLAPO...

Restricted Access to ServiceTime Sheets UPS QA - UAT Supplier - Miled

All Payments Order Changes

All Play Me Now Business Performance

Sourcing

Cancel **Send Invitation**

Coupa Supplier Portal – Getting Started

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.

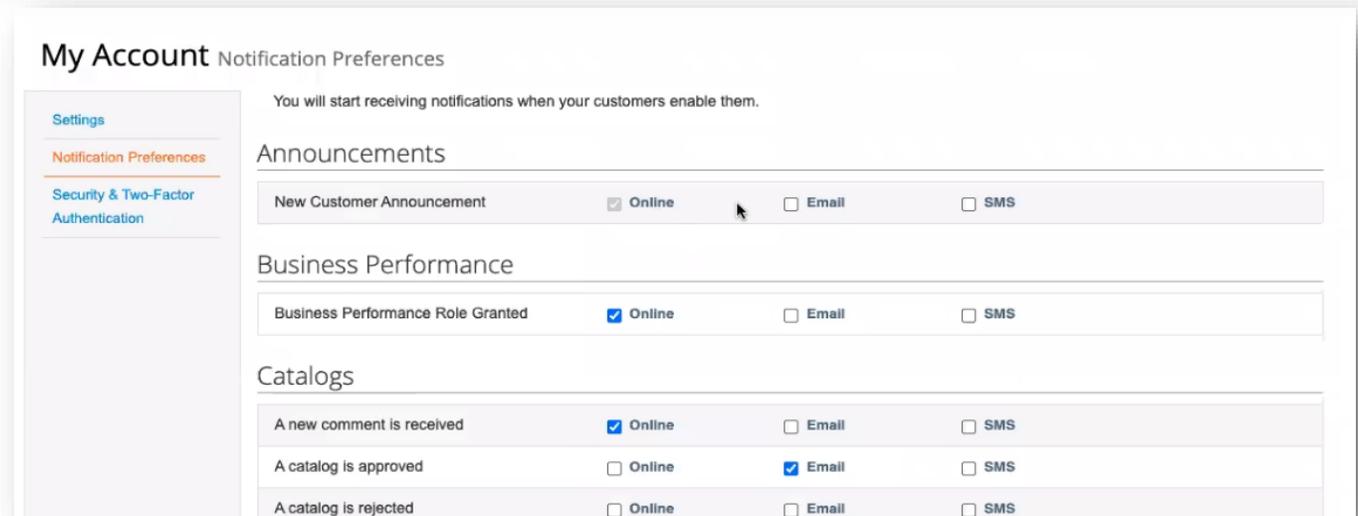
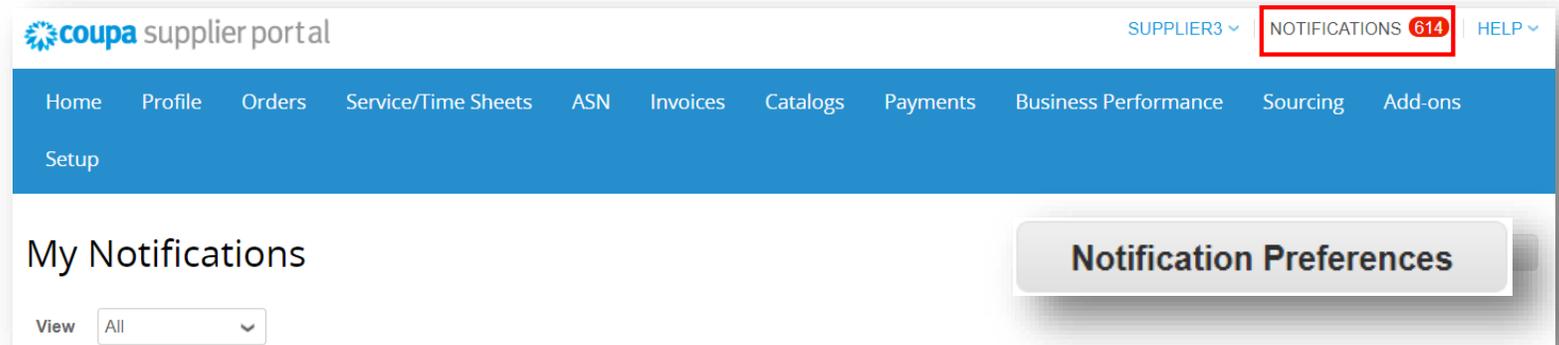
The screenshot shows the 'Invite User' dialog box in the Coupa Supplier Portal. The dialog is titled 'Invite User' and has a close button (X) in the top right corner. It contains three input fields: 'First Name', 'Last Name', and 'Email'. Below these fields are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has a radio button for 'All' (selected), a radio button for 'Restricted Access to Orders', and a radio button for 'All'. There are also checkboxes for 'Admin', 'Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'All', 'Payments', 'Order Changes', 'Pay Me Now', 'Business Performance', and 'Sourcing'. The 'Customers' section has a radio button for 'All' (selected) and a radio button for 'Restricted Access to Service/Time Sheets'. There are also checkboxes for 'UPS - CRP Supplier 3', 'UPS - P035_30754_FLDELRA2200_OL_OFFICE DEPOT', 'UPS QA - P035_3313610_TXDALLAPOBOKA731_BEST BUY FOR BUSINESS', and 'UPS QA - UAT Supplier - Milind'. At the bottom of the dialog are two buttons: 'Cancel' and 'Send Invitation'.

Coupa Supplier Portal – Getting Started

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.



Coupa Supplier Portal – Getting Started

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.

The screenshot displays the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'SUPPLIER3' with a dropdown arrow, 'NOTIFICATIONS 613', and 'HELP' with a dropdown arrow are on the right. A blue navigation bar contains the following items: Home (with a dropdown arrow), Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below the navigation bar, a red banner reads 'Action needed: Complete your profile to get paid faster and get discovered' with a 'Learn More' link. Underneath, a 'Profile Progress' section shows a progress bar at 16% Complete and 'Last Updated' 18 days ago, with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '6 Legal Entities View', '1 Registered User View', and '4 Connected Customers'. Below these are four tabs: 'Banking Info', 'Diversity Info', 'Accelerate', and 'Bribery Policy'. The 'CRP Supplier 3' section is partially visible at the bottom. On the right side, there are three sections: 'Announcements View All (1)' with an 'ATTENTION: (UPS QA)' notice, 'One-Click Savings View All' with a 'Start saving today!' notice, and 'Merge Accounts' with instructions: 'If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers. Not seeing the account you want to merge with? Click here.' A large red arrow points from the 'Merge Accounts' section towards the 'CRP Supplier 3' section.

Coupa Supplier Portal – Getting Started

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*.

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' tab is highlighted. Below the navigation bar, the 'Admin' page is shown, with 'Legal Entity Setup' selected in the left margin. The 'Add Legal Entity' button is highlighted with a red arrow. A modal window titled 'Where's your business located?' is open, showing the 'Legal Entity Name' and 'Country' fields. The 'Legal Entity Name' field contains 'Bell Corp Test' and the 'Country' dropdown is set to 'United States'. The 'Continue' button is highlighted with a red arrow.

Coupa Supplier Portal – Getting Started

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.

The screenshot shows a web form titled "Tell your customers about your organization". It is divided into two main sections:

- Which customers do you want to see this?**: A list of customer entities with checkboxes. All are checked:
 - All
 - UPS - CRP Supplier 3
 - UPS - P035_30754_FLDELRA2200_OL_OFFICE DEPOT
 - UPS QA - P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS
 - UPS QA - UAT Supplier - Milind
- What address do you invoice from?**: A form with the following fields:
 - * Address Line 1:
 - Address Line 2:
 - * City:
 - State:
 - * Postal Code:
 - Country: United States

At the bottom, there are two checkboxes, both checked, with information icons (i):

- Use this address for Remit-To
- Use this for Ship From address

On the right side, a blue box labeled "REQUIRED FOR INVOICING" contains the text: "Enter the registered address of your legal entity. This is the same location where you receive government documents."

Coupa Supplier Portal – Getting Started

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.

What is your Tax ID? ⓘ

Country ×

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code ⓘ

Preferred Language

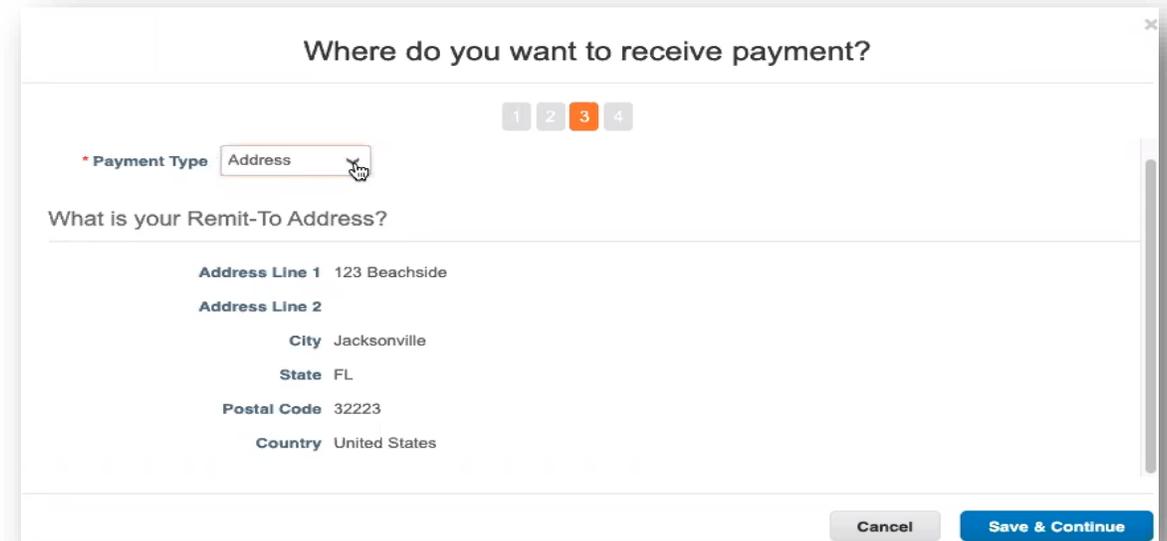
Coupa Supplier Portal – Getting Started

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](#).



Where do you want to receive payment?

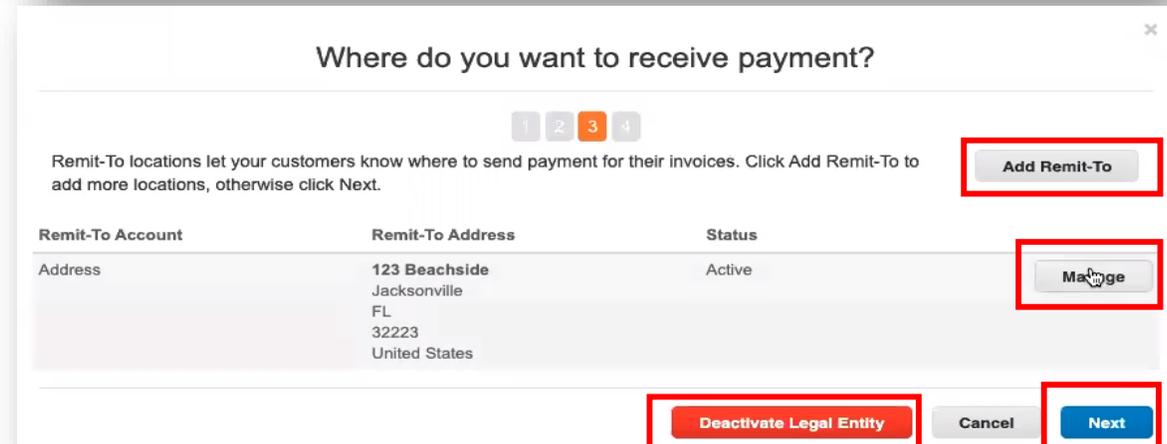
1 2 3 4

* Payment Type

What is your Remit-To Address?

Address Line 1 123 Beachside
Address Line 2
City Jacksonville
State FL
Postal Code 32223
Country United States

Cancel Save & Continue



Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Remit-To Account	Remit-To Address	Status	
Address	123 Beachside Jacksonville FL 32223 United States	Active	Manage

Deactivate Legal Entity Cancel Next

Coupa Supplier Portal – Getting Started

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.

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status
123 Beachside Jacksonville FL 32223 United States	Active

Manage

Deactivate Legal Entity **Done**

What is your Ship From Address?

* Address Line 1

Address Line 2

* City

State

* Postal Code

* Country

What is the physical address that your goods are shipped from? This can be a warehouse address.

Cancel **Continue**

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Setup Complete

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

Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** ⓘ

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#) [Done](#)



THANK YOU