Coupa Supplier Portal:
Getting Started

3/11/2025

Coupa Supplier Portal

Getting started

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/Registration

- New and existing suppliers will receive an e-mail from our Coupa system (mail id - do_not_reply@supplier.coupahost.com or do_not_reply@ups.coupahost.com) with a unique link to join the Coupa Supplier Portal. Click *Join and Respond* to be redirected to the account creation page.

  > *Note: If an invitation is not received, suppliers can send an e-mail to supplyline@ups.com, using the subject line: Coupa Supplier Enablement, to request an invitation to Coupa.*

- Save bookmark https://supplier.coupahost.com/sessions/new as a favorite link for quick access, to return to the site.

- Suppliers who are new to UPS must go through the supplier onboarding process with Global Business Services (GBS).

  > *Note: New CSP users click Create An Account and complete the registration process. Already have a CSP account? Log in using your current credentials.*
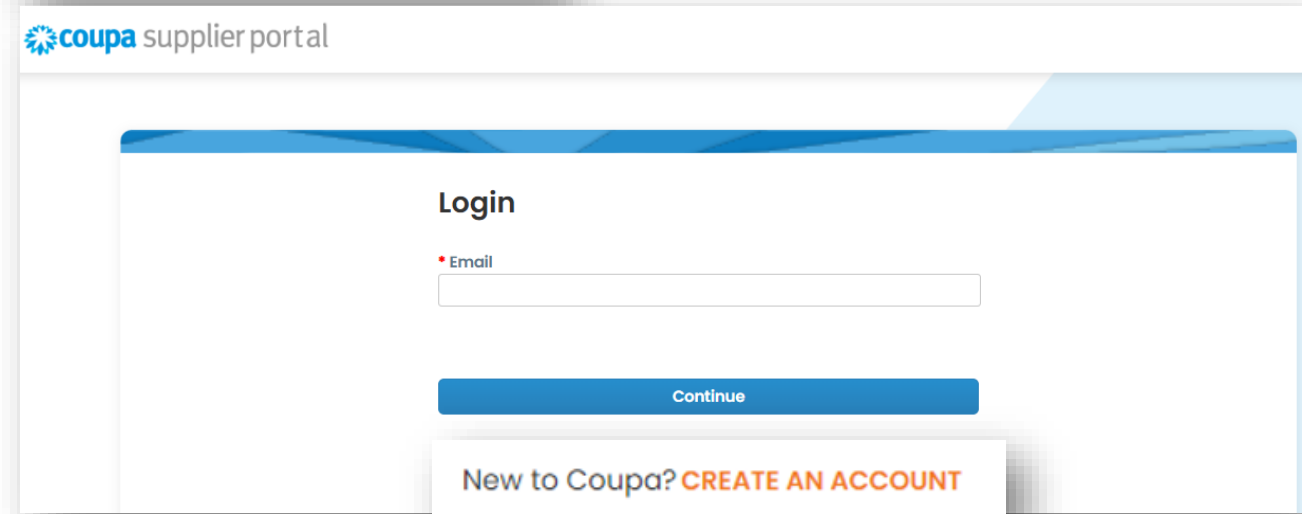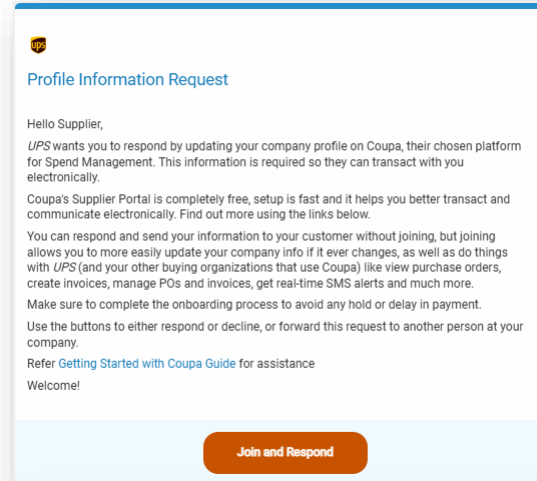
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Create CSP Account

1. On the account creation page, complete the required fields, check the box to accept the privacy policy and terms and conditions, and then click *Create an Account*.

2. Coupa will send a verification code via email. Enter the verification code then click *Next*.

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

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General Information

- Once the new account has been created, Coupa will ask to provide *Account Details* & *Payment Information* where supplier need to provide a mandatory details marked with asterisk sign ***** to complete their profile setup.

- Complete all required fields, then click *Next.* If your company accept *Virtual Card* payments, fill the details or else select the check box *Do not accept virtual card payments from this customer.*

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details   Payment Information

Primary Address

| * Country/Region | * Address Line 1 | Address Line 2 |
| * City | * State | * Postal Code |

Next

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

✓ Primary Address saved successfully

Account Details   Payment Information

Virtual Card ⓘ   Customer Supported

Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ   * Email Address

☐ Do not accept Virtual Card payments from this customer

Next

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General Information (optional)

• Provide Bank Transfer and Check details for fields marked with asterisk ✱ sign.

Note – These details will not be used by UPS for payment purpose. These details are required to complete your Global COUPA Profile setup.
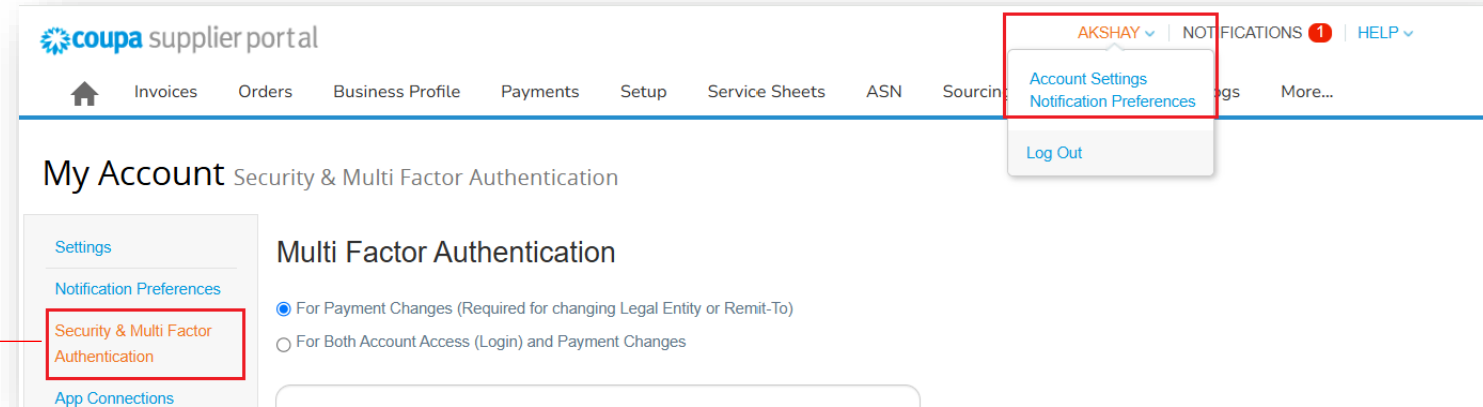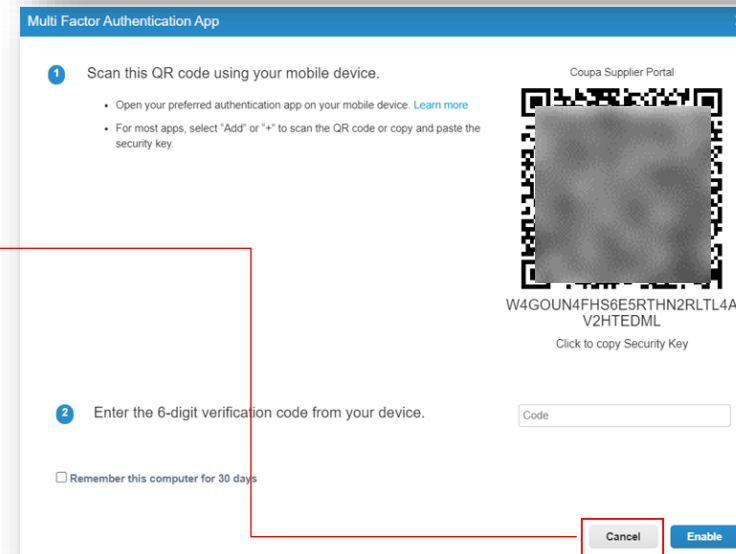
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Security & Multi-Factor Authentication

- Suppliers must complete the *Security & Multi-Factor Authentication* process by using an authenticator app or verifying a code received via text to a mobile number.

- Hover the cursor over your name in the upper right corner then select *Account Settings* and *Security & Multi Factor Authentication*.

UPS recommends to enable two factor authentication via text message. Thus, do not click on "*Enable*" to complete authentication via Authenticator App.
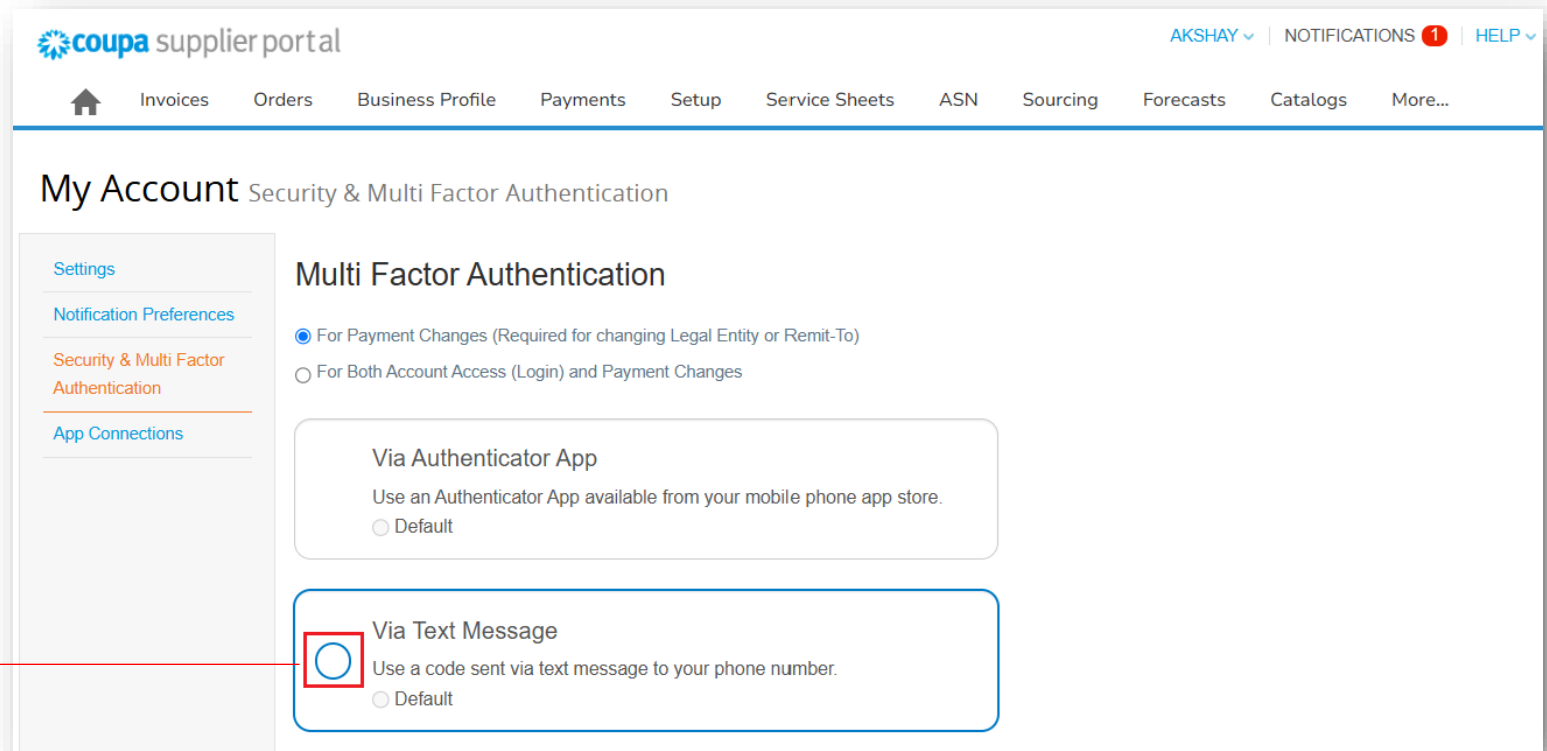Click *Cancel* to receive a code via text message.

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Security & Multi-Factor Authentication

- To complete two-factor authentication with a code sent to your phone number, select the *Via Text Message* option.

- Supplier can refer the below PDF to review the Two-factor authentication process in detail.

Adobe Acrobat
Document

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Security & Multi-Factor Authentication – Recovery Codes

- Once authentication is completed, COUPA will provide you a 6 unique recovery codes, which can be used to complete the authentication in future. While adding a *Legal Entity* or *Remit-To,* if authentication code is not received in Authenticator App or through text message, supplier can use these codes.

- Each code can be used only once; thus, supplier must *Download* it for future reference.

Recovery Codes ✕

These codes were generated on February 25, 2025

Emergency Recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

KpDsJw	dPxKmA
FnxKgQ	6DOP_Q
GBYV4g	MRbAoA

Copy   Download   **Print**

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Legal Entities

- Create *Legal Entities if not created.* Click on *Business Profile* > *Legal Entities* > *Create to create a new legal entity.*

- Supplier should have at least one legal entity with correct details. While adding a *Remit-To* supplier need to select the correct *Legal Entity*.

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Legal Entities

- Supplier need to fill the details with asterisk * sign and click on *Save* to create a *Legal Entity* (if not created).

Create Legal Entity ✕

* Legal Entity Name

* Country/Region

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region

* Address Line 1

Address Line 2

* City

* State

* Postal Code

Invoice From Code ⓘ

Ship From Address

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

☑ Same as Invoice From Address

Cancel   **Save**

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Create Business Profile

- On the *Business Profile* page > *Information Requests* > Profile > Select Latest Form.

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Create Business Profile

- On the *Business Profile* page > *Information Requests* tab, enter the required information in the fields AND sections marked with an asterisk.

  Note: The Supplier Information name is how UPS identifies a supplier. The Tax Reporting Name is the official name of the company as it appears on tax documents. The two may be different.

  Note: Suppliers who save their profile creation progress can return to this tab to complete later. Also, some fields in the Head Quarter Address section will be auto populated with information previously provided.

  Note: Be sure to select the correct UPS-associated vendor profile from the Profile dropdown.

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Create Business Profile - Suppliers Working a UPS Facility

- If "Yes" is selected in the *Supplier working in a UPS facility* field, a certificate of insurance must be attached to the profile

* Supplier working in a UPS facility

Yes

Certificate of Insurance is mandatory for supplier working in UPS facility.

*Certificate of Insurance

* Type

Effective Date

mm/dd/yy

* Expiration Date

mm/dd/yy

* Attachments

Add File

Description

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Create Business Profile - Primary Address

- In the Primary Address section, complete the required fields.

  *Note: Although they are not marked with an asterisk, the **Country/Region** and **State Region** fields are mandatory*

  Note: If the primary address and remit-to are the same, please be sure to enter the address the same way in BOTH the Primary Address and Remit-To Address (page 19) sections

Coupa Supplier Portal – Getting Started

Create Business Profile – Primary Contact

- In the *Primary Contact* section, enter the contact information of the person who will be responsible for all communications from UPS.

- Complete the remaining asterisk-marked fields as well as any applicable optional fields.

    Note: The primary contact email address and the PO Email address may be different. Example: jsmith@supplier.com may be the primary contact and orders@supplier.com may be where purchase orders are received

- In the *Preferred Currency* section update the currency of invoices issued to UPS.

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Create Business Profile – Tax Information

- In the *Tax Information* section, enter all applicable tax information and attach supporting documentation.

- Use the dropdown menus to select *Tax Classification*.

- Enter the appropriate number in the *Enter VAT ID* field. (Make sure to enter country code as prefix)

- In Supporting Documents section click *File* then *Browse* or drag and drop a file into the *Drop files here* to attach the necessary documents like *company letterhead, invoice, bank letterhead* etc.

- Enter the email address where payment information should be received in the *Remittance Email* field.
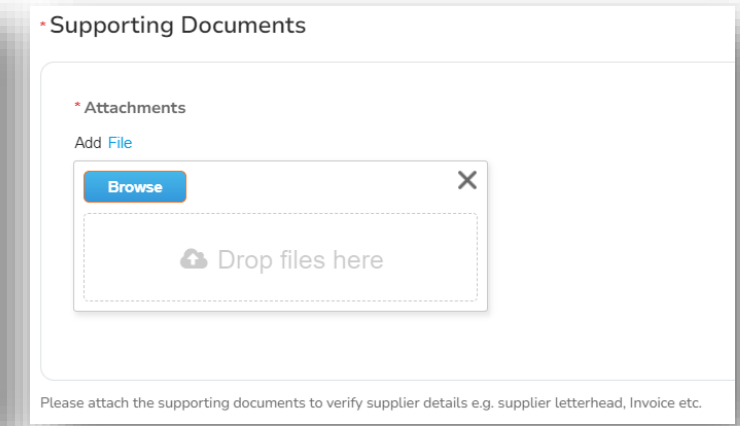
Tax Information

Tax Classification

Select ⌄

Enter VAT ID

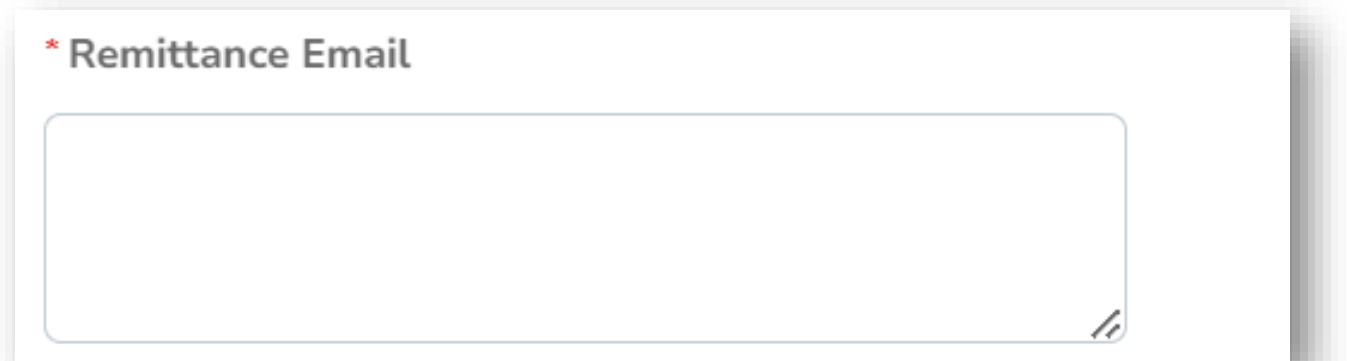If VAT ID is not available, enter "N/A"

Supporting Documents

*Attachments

Add File

Browse ✕

☁ Drop files here

Please attach the supporting documents to verify supplier details e.g. supplier letterhead, Invoice etc.

*Remittance Email

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Create Profile – Remit-To Address

- In the *Remit-To Addresses* section, click the *Add Remit-To* button then *Choose* to select the existing remit-to address.

  Note: New suppliers will not have a remit-to address to choose from and will have to create a new remit-to address.

- To add banking details, click on *Add Payment Method* > *Bank Transfers*.

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Create Profile – Remit-To Address – Add Payment Method

- Select correct *Associated Legal Entity* and fill required banking details marked with asterisk ***** sign.
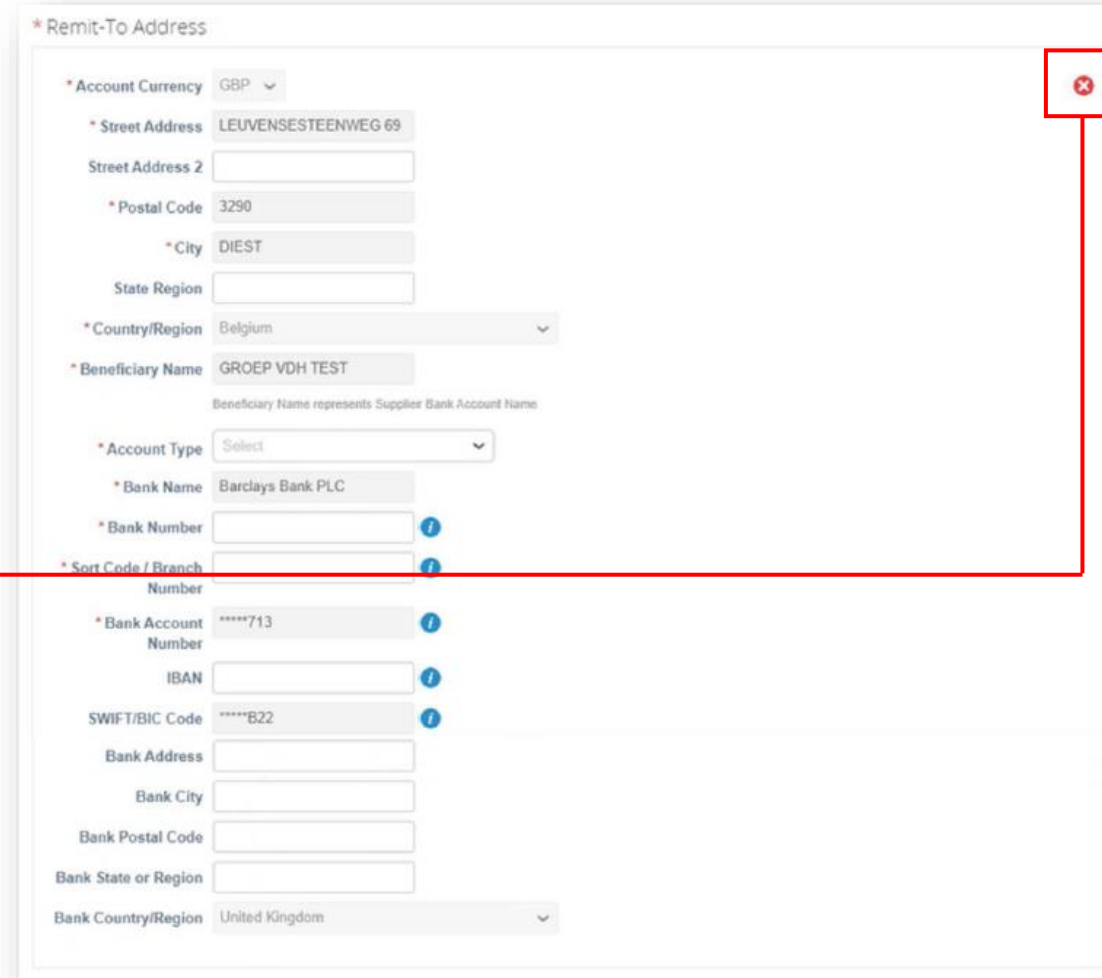
- After filling all details click on *Save*.

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Remit-To Address

- Ensure to Review *Remit-To Address* section and complete all fields with asterisk mark.*****

- Refer below excel to enter banking details.

  Microsoft Excel Worksheet
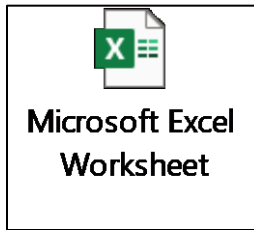
- Note: If the Remit-To address is incorrect, click the red "**X**" in the upper right corner to delete it. Follow the steps beginning on page 16 to create a new one.

- Scroll to the bottom of the page

Coupa Supplier Portal – Getting Started

Remit-To Address Setup

- Review the *GIC/PO Terms and Conditions*

- If agreeable, check the box next to GIC/PO Terms & Conditions Flag and click *Submit for Approval*

Validation Results

GIC / PO Terms and Conditions "By submitting this onboarding form, I (Supplier) am entering into an agreement with UPS. If Supplier and UPS have entered into an existing agreement that covers the subject matter of the goods and/or services being provided by Supplier ("Existing Agreement"), then the Existing Agreement will govern the subject matter of the goods and/or services provided by Supplier and Existing Agreement will supersede the UPS Terms & Conditions found under the URL below. If the Supplier and UPS do not have an Existing Agreement, then the UPS Terms & Conditions will Govern the subject matter of this transition. Business conduct and terms and conditions (ups.com)" Click below URL.

UPS GIC / PO Terms and Conditions URL

📄 https://about.ups.com/us/en/our-company/suppliers/...

* GIC / PO Terms & Conditions Flag

☑

You must check this box - GIC / PO Terms & Conditions Flag

By submitting this onboarding form, I warrant and represent that I am duly authorized and providing consent to Equifax to furnish my consumer report to UPS and providing consent to UPS to use my consumer report for the purpose of validating the address, tax and banking information provided in the onboarding form.

Decline   Save   **Submit for Approval**

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Remit-To Address Setup

- Once submitted, form status will be changed to *Pending Approval*.

- Need assistance? Got questions? Email supplyline@ups.com or you can connect with UPS contact person.

Coupa Supplier Portal – Getting Started

Admin

- To access administrative functions, click Setup in menu bar to be redirected to the Admin tab.

- Need assistance? Got questions? Email supplyline@ups.com.

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Admin – Invite User

- Click the *Invite User* button.

- On the *Invite User* pop up 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.

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.
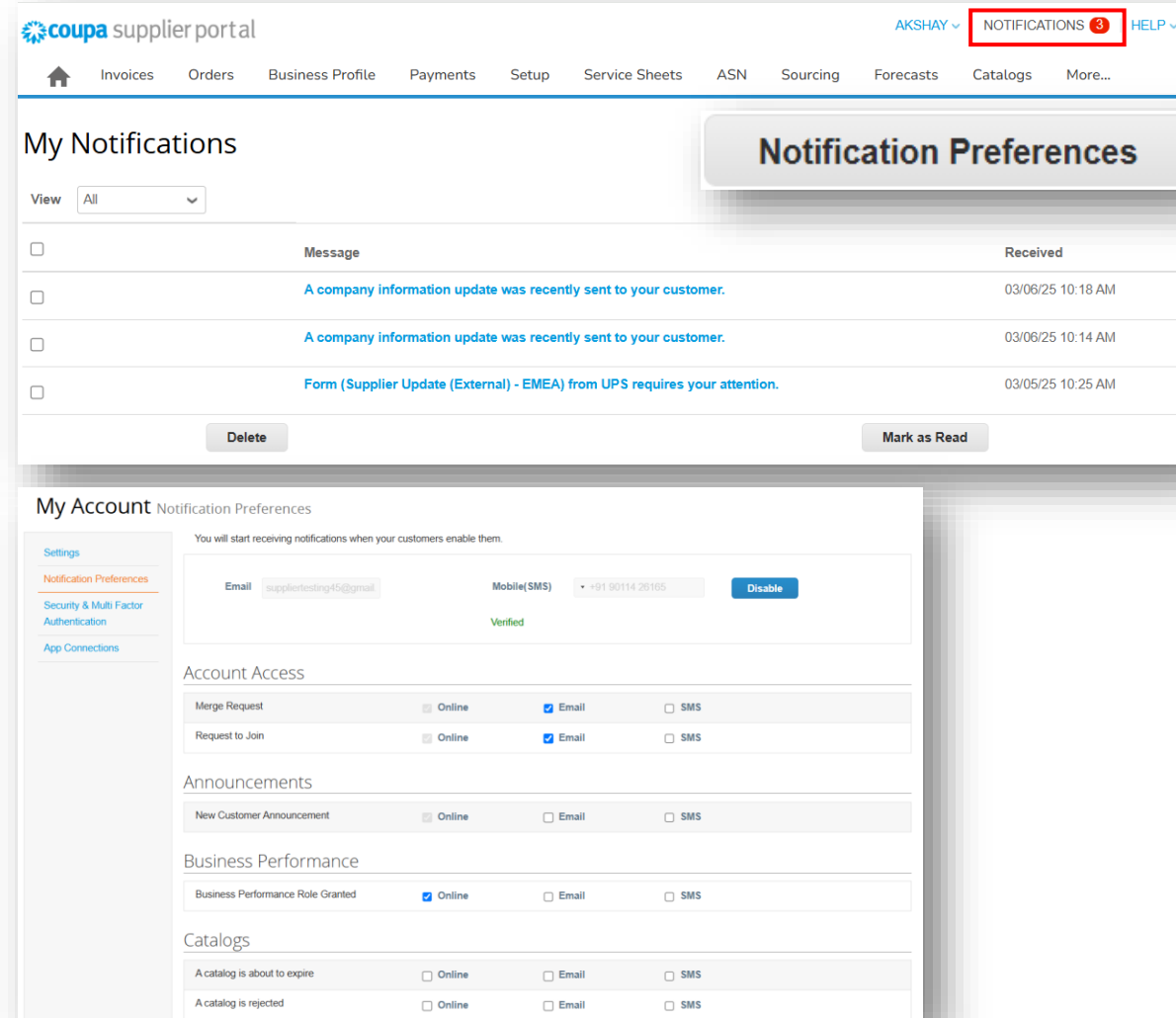
Coupa Supplier Portal – Getting Started

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.

Thank you for being a valued partner.