



Coupa Supplier Portal: Getting Started

3/11/2025

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Coupa Supplier Portal

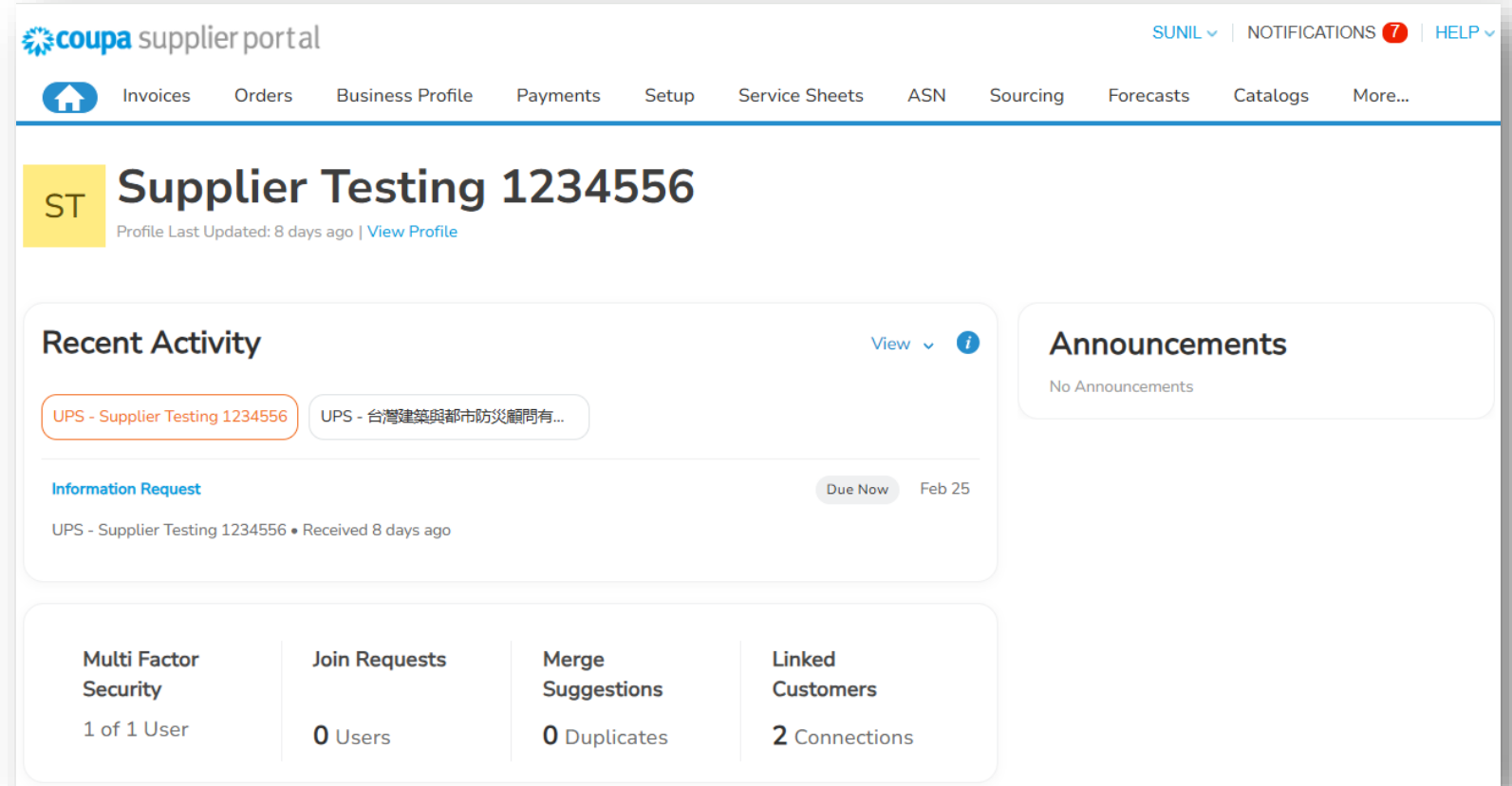
Getting started

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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.



Coupa Supplier Portal – Getting Started

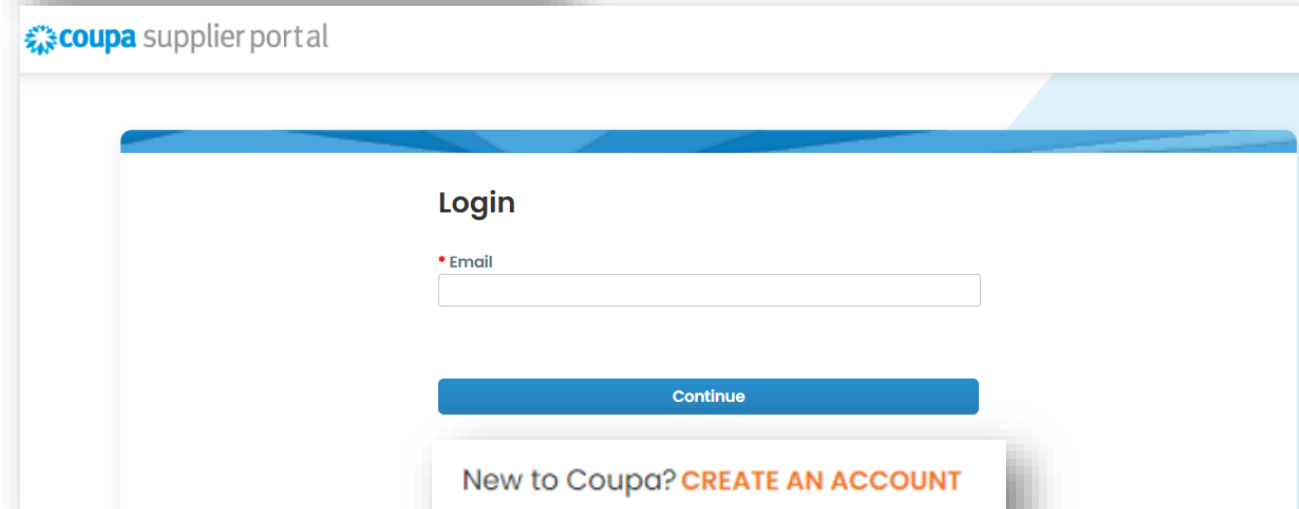
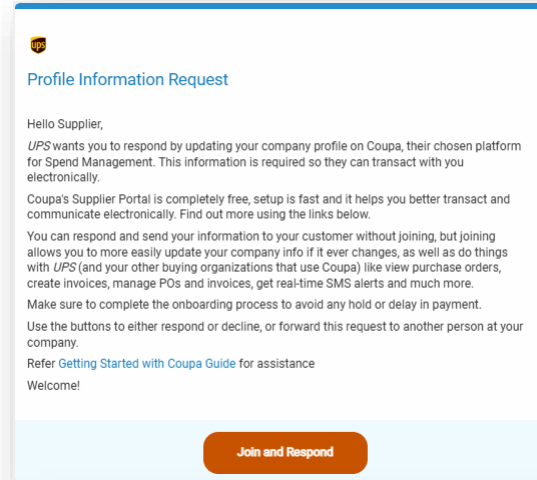
Invitation/Registration

- 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.



Coupa Supplier Portal – Getting Started

Create CSP Account

- 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](#).
- 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.*

Create an Account
Grow your Business on Coupa with a Free Account

* Business Name

Your legal business name (or legal personal name if an individual)

* Email

* First Name * Last Name

* Password * Confirm Password
Use at least 8 characters and include a number and a letter.

* Country/Region * Tax Registration ⓘ
 I do not have a Tax ID

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

[Create an Account](#)

Already have an account? [LOG IN](#)

< Back

Email Verification

We sent a one time verification code to ups.supplier.testing@outlook.com

5 9 6 7 5

Didn't receive the Verification Code? [Request a New Code](#)

[Next](#)

Coupa Supplier Portal – Getting Started

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](#)

Coupa Supplier Portal – Getting Started

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.

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

Account Details Payment Information

Bank Transfer Customer Supported

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * Bank Account Currency

Beneficiary Name * Bank Name

Account Number Confirm Account Number

IBAN ⓘ Confirm IBAN

My company expects international payments

Account Details Payment Information

Check Customer Supported

Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region

* Street 1

Street 2

+ Street 3

* City

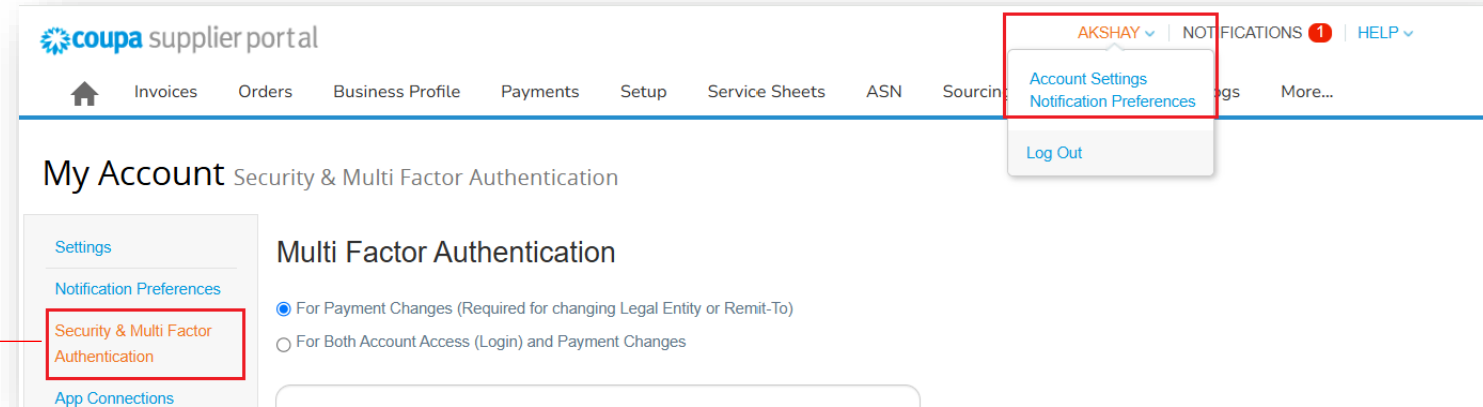
* State

* Zip Code

Coupa Supplier Portal – Getting Started

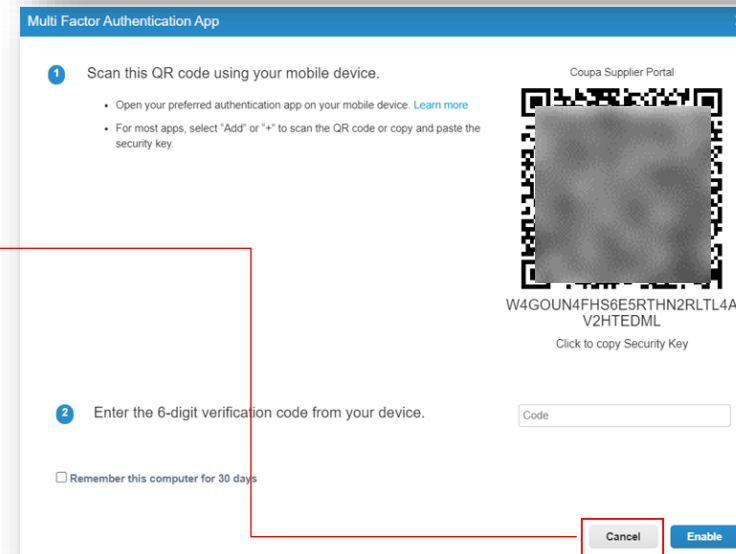
Security & Multi-Factor Authentication

- 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.



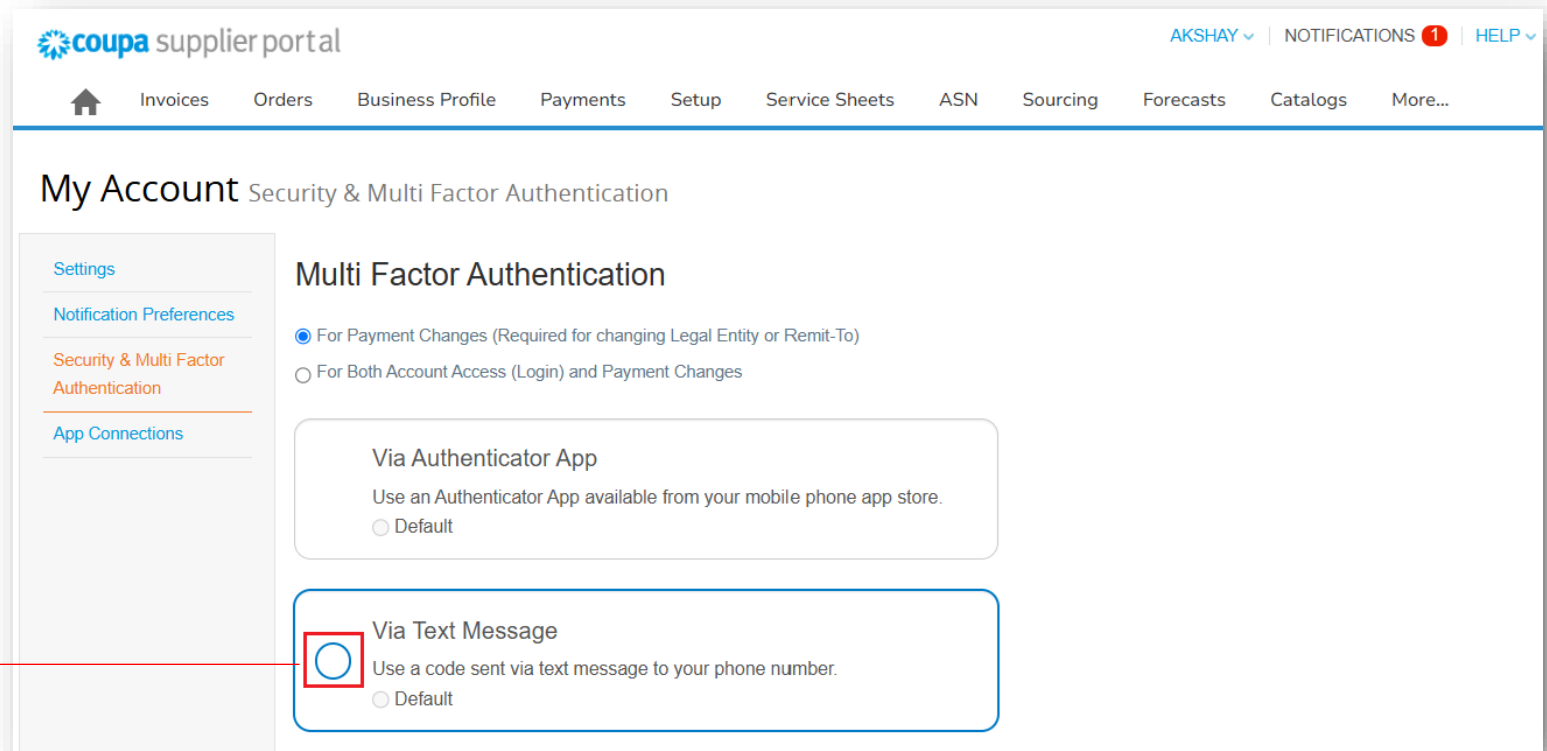
Coupa Supplier Portal – Getting Started

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



The screenshot shows the 'My Account' page for 'Security & Multi Factor Authentication'. The left sidebar contains a menu with 'Settings', 'Notification Preferences', 'Security & Multi Factor Authentication' (highlighted), and 'App Connections'. The main content area is titled 'Multi Factor Authentication' and has two radio button options: 'For Payment Changes (Required for changing Legal Entity or Remit-To)' (selected) and 'For Both Account Access (Login) and Payment Changes'. Below these are two configuration boxes. The 'Via Authenticator App' box has a 'Default' radio button. The 'Via Text Message' box has a radio button highlighted with a red square and a blue border, and a 'Default' radio button below it. A red arrow from the text on the left points to this radio button.

Coupa Supplier Portal – Getting Started

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

Coupa Supplier Portal – Getting Started

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*.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'AKSHAY', 'NOTIFICATIONS 1', and 'HELP'. The main navigation menu has 'Business Profile' and 'Legal Entities' highlighted with red boxes. Below the navigation, the 'Legal Entities' page is displayed, featuring a 'Create' button (also highlighted with a red box) and a search bar. A table lists the legal entities:

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
Supplier Testing	3 Kaasrui, Antwerpen, Antwerpen, Vlaams Gewest, 2000, Belgium	BE:BE1999999999	Check	3 Kaasrui, Antwerpen, Antwerpen, Vlaams...	None

Coupa Supplier Portal – Getting Started

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

Coupa Supplier Portal – Getting Started

Create Business Profile

- On the [Business Profile](#) page > [Information Requests](#) > [Profile](#) > [Select Latest Form](#).

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal' and user information 'AKSHAY' with a notification count of 9 and a 'HELP' link. The main navigation menu has 'Business Profile' highlighted. Below it, a secondary menu shows 'Business Profile', 'Legal Entities', 'Information Requests' (highlighted), and 'Performance Evaluation'. The main content area displays 'UPS - UPS Dave Test 2' and a 'Profile' dropdown menu set to 'UPS - UPS Dave Test 2'. Below this is the 'Form Responses' section, which includes a table with columns 'Form', 'Status', 'Created Date', and 'Submitted At'. The table contains one row: 'Supplier Update (External) - US', 'New', '03/07/25', and 'None'. The table also has a 'View' dropdown set to 'All', an 'Advanced' search button, and a search input field. At the bottom of the table, it says 'Per page 15 | 45 | 90'.

Form	Status	Created Date	Submitted At
Supplier Update (External) - US	New	03/07/25	None

Coupa Supplier Portal – Getting Started

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.

The screenshot displays the 'coupa supplier portal' interface. The top navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. The 'Business Profile' tab is active, and the 'Information Requests' sub-tab is selected. The main heading is 'UPS - US SUPPLIER TESTING DEMO 6'. A dropdown menu for 'Profile' is set to 'UPS - US SUPPLIER TESTING DEMO 6'. A green message states: 'We have auto-filled some information from your Public Profile.' A yellow message prompts: 'Choose the correct State or Region unless you need to keep the current value.' Below this, there is a 'View All Responses' link and a 'Supplier Update (External) - US' section with the instruction: 'This form goes out to the supplier to complete and return back to UPS for review and approvals.' The 'Supplier Information' section shows 'US SUPPLIER TESTING DEMO 6'. The 'Supplier Information Request Form' section contains the instruction: 'Please provide the requested information below.' The 'Company Information' section has a 'Tax Reporting Name' field with the value 'New Supplier Testing 234'. A red asterisk is next to the 'Tax Reporting Name' label. At the bottom, a note reads: 'Enter the company name as it appears on your official tax document or as registered with the local tax authority.'

Coupa Supplier Portal – Getting Started

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 x v

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

Coupa Supplier Portal – Getting Started

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

*** Primary Address**

Address Purpose ⓘ

*** Region**

Country/Region ▾

State Region ▾

State ISO Code

Address Name

*** Street Address**

Street Address 2

Street Address 3

Street Address 4

*** City**

*** Postal Code**

Location Code

Country/Region, State Region, Street Address, City, Postal Code are mandatory to be filled

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.

The screenshot shows a form titled "Primary Contact" with the following fields:

- * First Name:** Input field containing "AKSHAY".
- * Last Name:** Input field containing "MOHITE".
- * Email address:** Input field containing "supliertesting45@gmail.com".
- Mobile Phone:** A dropdown menu showing "US/Canada" and an input field containing "650-555-1212".
- * Work Phone:** A dropdown menu showing "US/Canada" and an input field containing "+1 (650) 555-1212".
- DUNS Number:** An empty input field with an information icon (i) to its right.
- * Preferred Currency:** A dropdown menu showing "USD" with a downward arrow.
- * PO Email:** An input field containing "supliertesting45@gmail.com" with an information icon (i) to its right.

Coupa Supplier Portal – Getting Started

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](#) and [Tax ID Type](#).
- Enter the appropriate number in the [Federal Tax ID](#) field.
- In Federal Tax Form select the valid type from drop down and attach W9 in attachments section.
- In Bank Form section click on [File](#) then [Browse](#) or drag & drop a file into the [Drop files here](#) to attach the voided check or bank letter head as a supporting documents for banking details.
- Enter the email address where payment information should be received in the [Remittance Email](#) field.

The screenshot shows the 'Tax Information' form. It includes a 'Tax Classification' dropdown menu, a 'Tax ID Type' section with radio buttons for 'TIN' and 'SSN', a 'Federal Tax ID' text input field with a blue information icon, and a 'Federal Tax Form' section with a 'Type' dropdown menu and an 'Attachments' section with an 'Add File' link.

The screenshot shows the 'Bank Form' section. It features a red asterisk followed by the text '* Attachments' and a blue link labeled 'Add File'.

The screenshot shows the 'Remittance Email' field, which is a large, empty text input box with a blue link labeled 'Add File' at the bottom right corner.

Coupa Supplier Portal – Getting Started

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](#).

*** Remit-To Addresses**

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

[Add Remit-To](#)

How would you like to be paid?

[All Methods](#) [Bank Transfers](#) [Checks](#) [Credit Cards](#)

[Add Payment Method](#) ▾

Credit Cards

Bank Transfers

Checks

UPS prefers Credit Cards, Bank Transfers, Checks Payments.

Currently, there are no valid accounts available for your selection

Coupa Supplier Portal – Getting Started

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*.

Add Payment Method ×

* Associated Legal Entity

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * Bank Account Currency

Beneficiary Name Bank Name

Branch Code Bank Account Type

Email Address ⓘ Remit-To Code ⓘ

Cancel Save

Coupa Supplier Portal – Getting Started

Remit-To Address

- Verify the Remit-To address. If the Remit-To address is correct, select the *Account Type* (checking, EDI, or savings) from the dropdown menu.
- 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

Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

* Remit-To Address

* Account Currency: USD

* Street Address: 9334 Dovewood Ct

Street Address 2: []

* Postal Code: 95662

* City: Orangevale

* Region: United States

Country/Region: United States

State Region: Florida - FL

State ISO Code: US-FL

Country/Region & State Region are mandatory to be filled

* Beneficiary Name: ABC DEMO

Beneficiary Name represents Supplier Bank Account Name

* Account Type: Select

* Bank Account Number: *****487

* Bank Routing Number: *****021

Bank Address: []

Bank City: []

Bank Postal Code: []

Bank State or Region: FL

* Bank Country/Region: United States

Active: Active

* Beneficiary Name: ABC DEMO

Beneficiary Name represents Supplier Bank Account Name

* Account Type: Select

* Bank Account Number: []

* Bank Routing Number: EDI (EDI)

Bank Address: Savings (Savings)

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**

Coupa Supplier Portal – Getting Started

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.

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is visible on the left, and user information 'AKSHAY' and 'NOTIFICATIONS 16' are on the right. A navigation bar includes 'Invoices', 'Orders', 'Business Profile' (highlighted), 'Payments', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. Below this, a sub-navigation bar shows 'Business Profile', 'Legal Entities', 'Information Requests', and 'Performance Evaluation'. The main content area is titled 'UPS - US SUPPLIER TESTING DEMO 6' with a 'Profile' dropdown menu set to 'UPS - US SUPPLIER TESTING DEMO 6'. A yellow alert box contains the message: 'Choose the correct State or Region unless you need to keep the current value.' Below the alert is a link 'View All Responses'. The main text reads 'Supplier Update (External) - US' followed by 'This form goes out to the supplier to complete and return back to UPS for review and approvals.' At the bottom, the status is 'Pending Approval' with an information icon. The 'Supplier Information' section shows 'US SUPPLIER TESTING DEMO 6'.

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.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Setup' (highlighted with a red box), 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. The sub-navigation bar shows 'Admin' (highlighted with a red box) and 'Connection Requests'. The main content area is titled 'Admin Users' and features a table of users. The table has columns for User Name, Email, Status, Permissions, Customer Access, Purpose, and Actions. A single user, AKSHAY MOHITE, is listed with an 'Active' status and various permissions. The 'Invite User' button and a search bar are visible at the top of the table area.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
AKSHAY MOHITE	suppliertesting45@gmail.com	Active	ASNs Admin Business Performance Catalogs Community Early Payments Forecast Planner Hidden, Private, and Public Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service Sheets Sourcing	UPS	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	Edit

Coupa Supplier Portal – Getting Started

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.

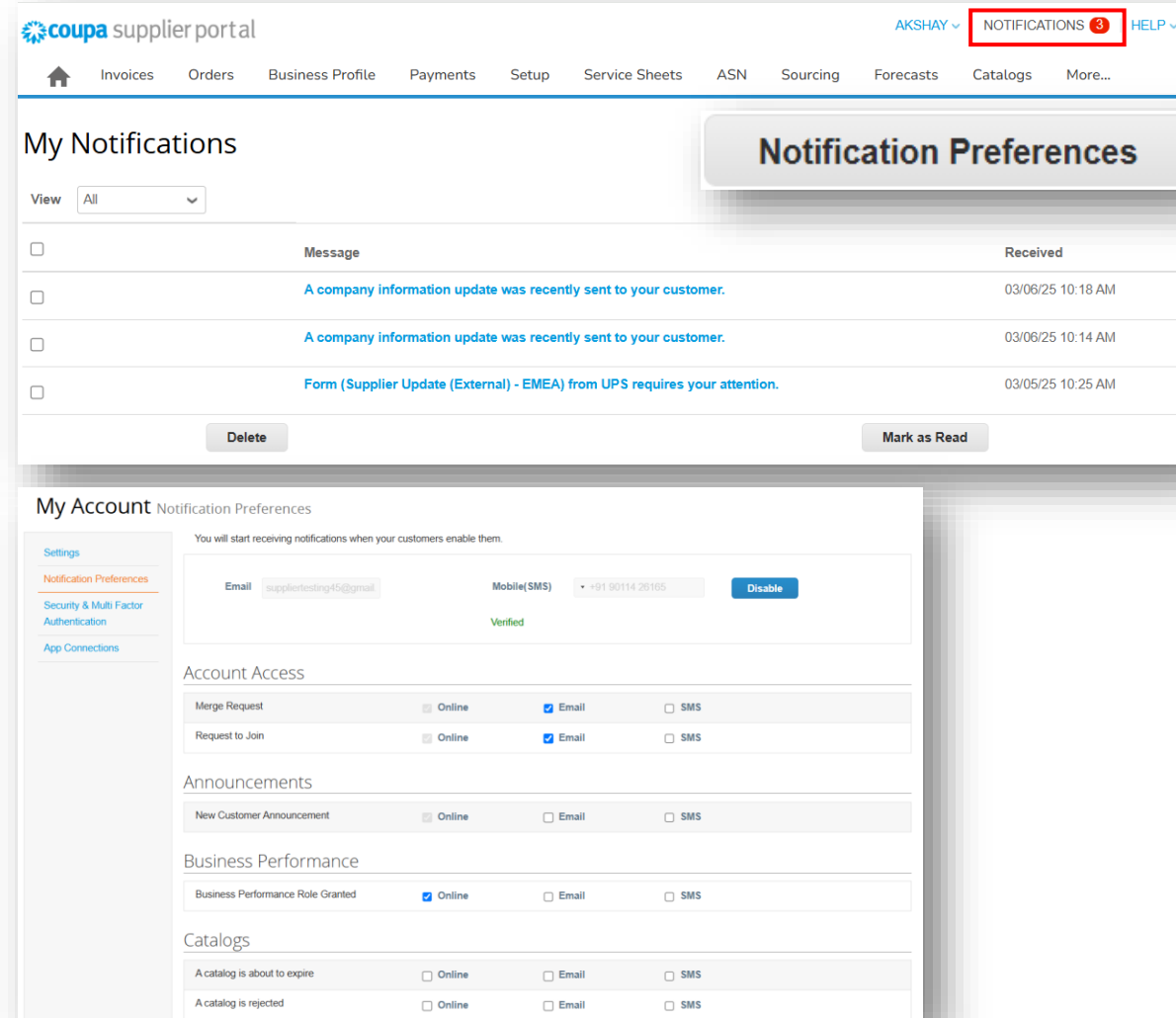
The screenshot shows the 'Invite User' form in the Coupa Supplier Portal. The form is divided into four main sections: User Information, Phone Number, Permissions, and Customers. The User Information section includes fields for First Name, Last Name, Email, and Purpose. The Phone Number section includes a dropdown for Country/Region, and input fields for Area/City, Local, and Extension. The Permissions section has a list of checkboxes for various functions, with 'All' selected. The Customers section has a checkbox for 'All' and 'UPS'. At the bottom right, there are 'Cancel' and 'Send Invitation' buttons, with the latter highlighted by a red box.

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 shows the Coupa Supplier Portal interface for a supplier named 'New Supplier Testing 234'. The page includes a navigation menu with options like Invoices, Orders, Business Profile, Payments, Setup, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, and More... The main content area features a 'Recent Activity' section with three 'Information Request' entries from UPS, each with a status (Submitted or Due Now) and a date. To the right, there is an 'Announcements' section with 'No Announcements'. At the bottom, a task menu contains four items: 'Multi Factor Security' (1 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection). A large red arrow points from the 'Join Requests' item to the 'Merge Suggestions' item.



Thank you for being a valued partner.