Coupa Supplier Portal:
Getting Started

9/23/2021

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.
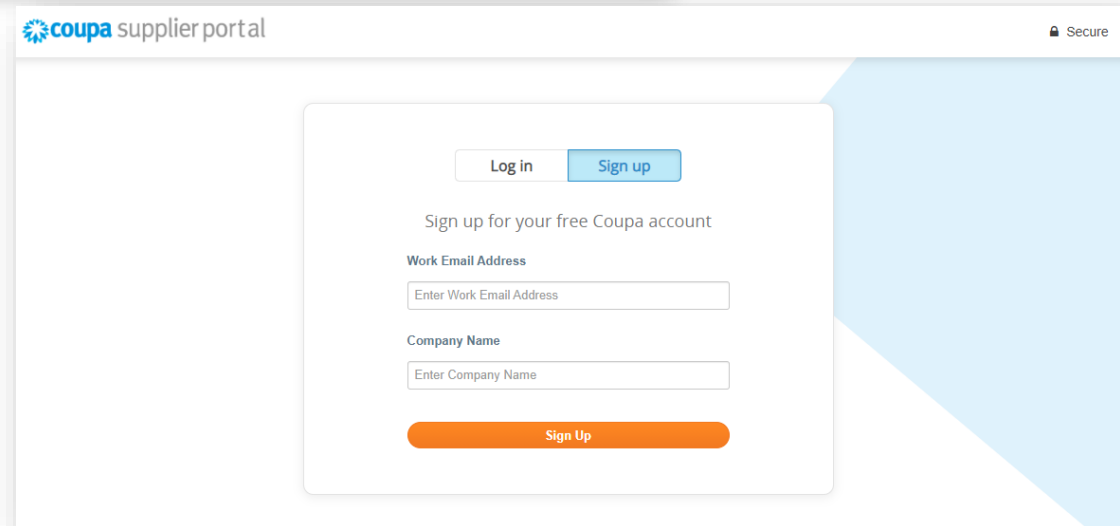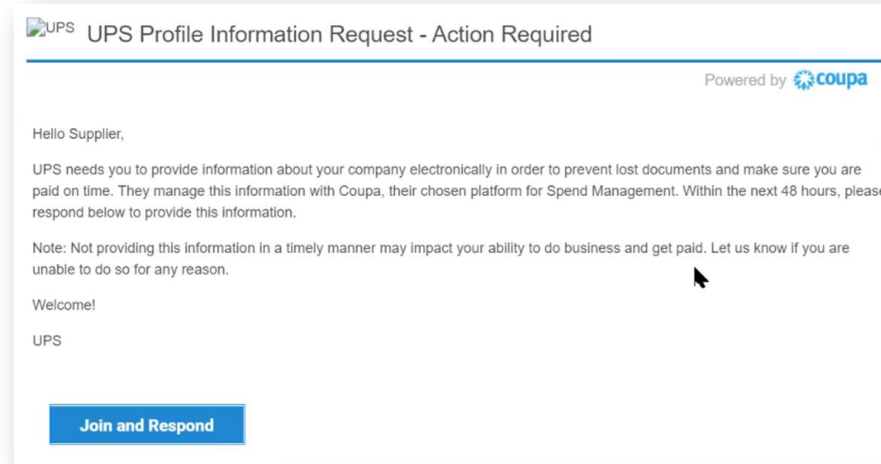
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Invitation/Registration

- Existing suppliers will receive an e-mail from our Coupa system 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.*

- Bookmark https://supplier.coupahost.com/ 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).

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Create CSP Account

1. On the account creation page users will be instructed to create a password. Once complete, check the box to accept the privacy policy and terms and conditions, then click *Get Started*.

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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General Information

- On the *Tell us about your business* page, enter the required information in the fields marked with an asterisk.

  Note: If invoice-from, pay to, or ship from location address differ from the primary address, uncheck the appropriate box and enter the correct address.

- cXML, SFTP, or EDI suppliers can click the Advanced Invoicing check box and enter the invoice-from code

- Click *Next*.

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General Information - Continued

- On the *Provide your default bank information* page, enter the required information in the fields marked with an asterisk.

  Note: The Country/Region and Currency fields will auto populate based upon country of origin. International will NOT be required to enter banking until later in the registration/form completion process.

- Suppliers who wish to accept card payments should check the *I accept card payment* box and enter the email address associated with those payments in the *Send to email address* field.

- Click *Next*.

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General Information – Dynamic Discounting (Optional)

- On the *Would you like to offer discounts to get paid faster?* page select the preferred discount percentage from the dropdown next to the applicable default payment term.

  Note: UPS will make the determination as to suppliers' eligibility for the Dynamic Discounting option.

- Click *Next*.

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General Information

- On the *You are one step away from doing business with UPS* page, click *Take Me There* to be redirected to the *Profile* page.

- Click *Next*.
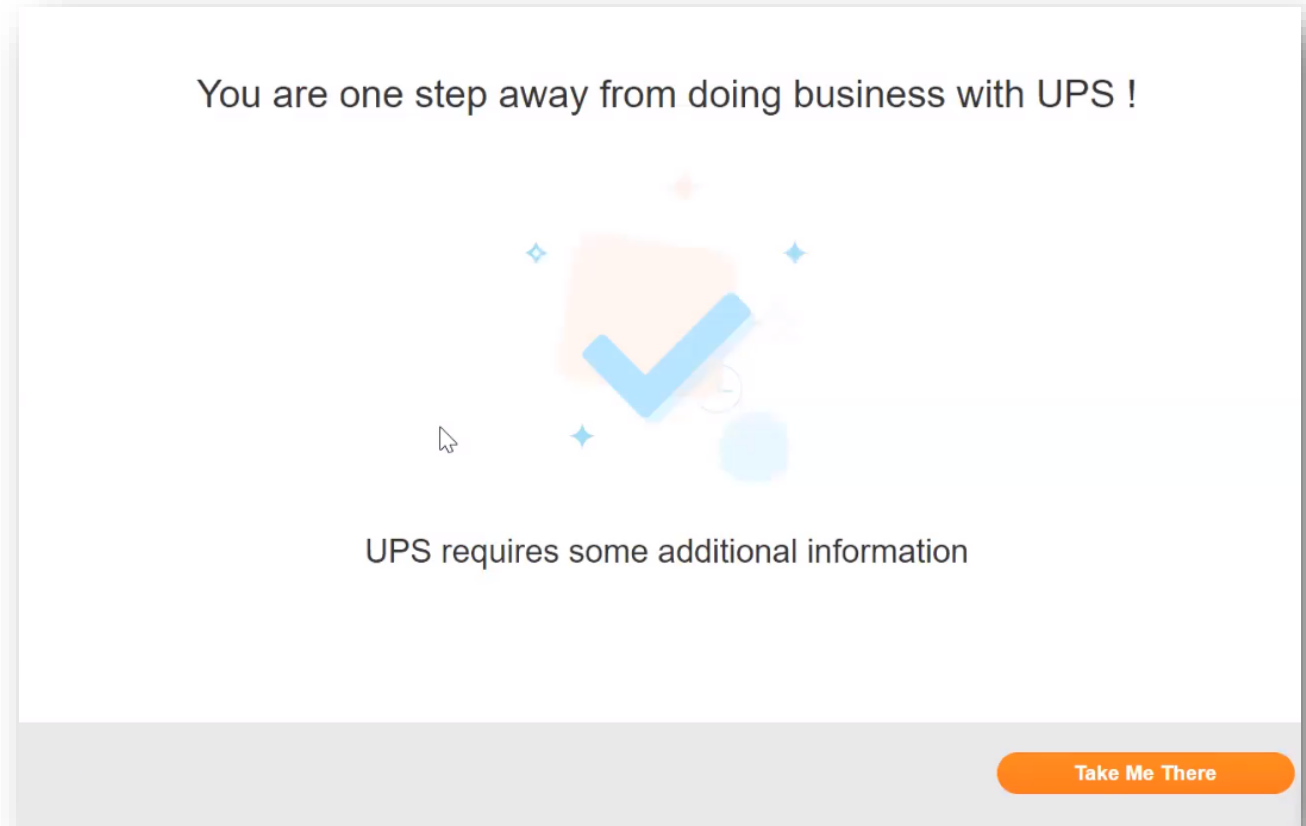
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Create Profile

- On the *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.

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Create 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

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Create Profile – Tax Information

- In the *Tax Information* section, enter all applicable tax information.

  Note: The Tax Information section is not marked with an asterisk, but all applicable tax information is REQUIRED by UPS.

- Choose the appropriate *Tax ID Type* (TIN/SSN) and enter the *Federal Tax ID* number.

- Use the dropdown menus to select *Tax Classification* and tax form types – federal and state (if applicable).

- Click *File* then *Browse* or drag and drop a fille into the *Drop files here* box to attach the necessary tax documents (W8 or W9).
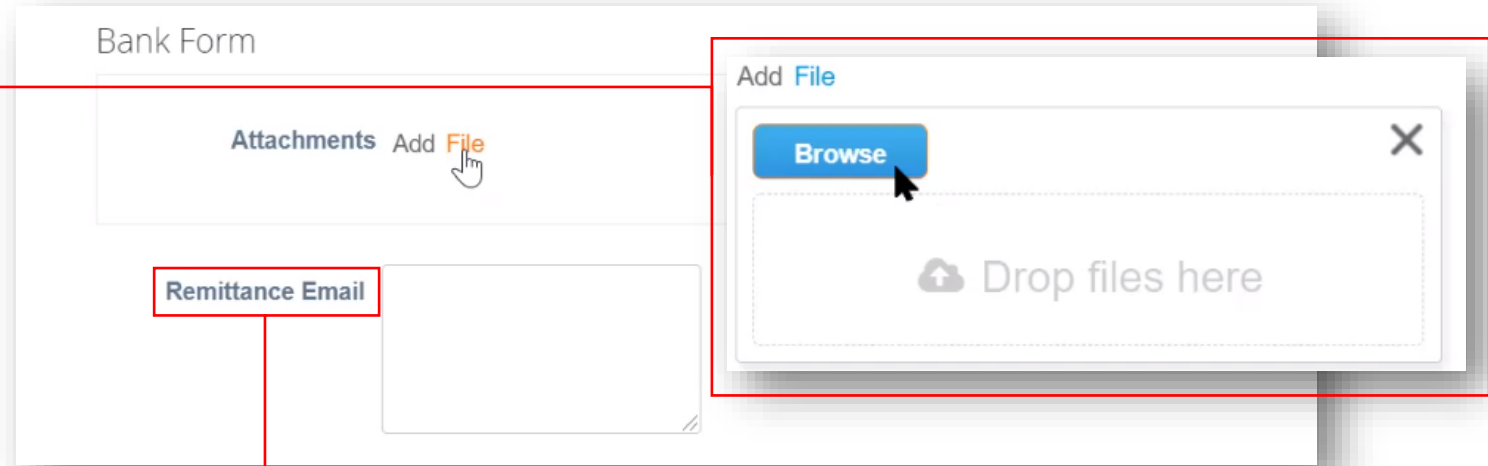
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Create Profile – Bank Form

Note: The Bank Form section is not marked with an asterisk, but it is REQUIRED by UPS for all US suppliers. Not applicable to international suppliers.

- In the *Bank Form* section, click *File* then Browse or drag and drop files into the *Drop files here* box to attach a bank remittance letter.

- The bank remittance letter should include bank name, account name, routing and account numbers, and any additional, relevant banking information.

- Enter an email address, if applicable, in the *Remittance Email* field.

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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 create a new remit-to address click the *Create New Remit-To Address* button OR, if profile creation is complete, click *Submit for Approval*.

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Create Profile – Remit-To Address

- On the *Where's your business located* pop up window, enter the *Legal Entity Name and select the Country/Region* from the dropdown menu.

- Click *Continue*.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel   **Continue**

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Create Profile – Miscellaneous Information

- On the *Miscellaneous Information* pop up window, enter the *Legal Entity Name and select the* *Country/Region* from the dropdown menu (Canadian Suppliers can enter a *PST/QST Registration Number*).

- Click *Save & 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.

Tell your customers about your organization

Which customers do you want to see this?

- ☑ 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?

* Address Line 1
Address Line 2
* City
State
* Postal Code
Country   United States

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. ⓘ

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

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Legal Entity Setup

- Enter *Tax ID*, if applicable.

  Note: International suppliers will be required to enter a VAT ID number, 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 – US Suppliers Only (International Suppliers, Next 4 Slides)

- 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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Banking Information – International Suppliers

- On the Where do you want to receive payment? page, select *Bank Account* 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.

- Complete all applicable fields in the *What are your Bank Account Details?* and *What is your Bank's Branch Address?* sections.

- Attach supporting documents (i.e. voided check, remittance letter, etc.) by clicking *Choose Files* in the *Supporting Documents* field and browsing your computer for appropriate files.

- Click *Save & Continue*.
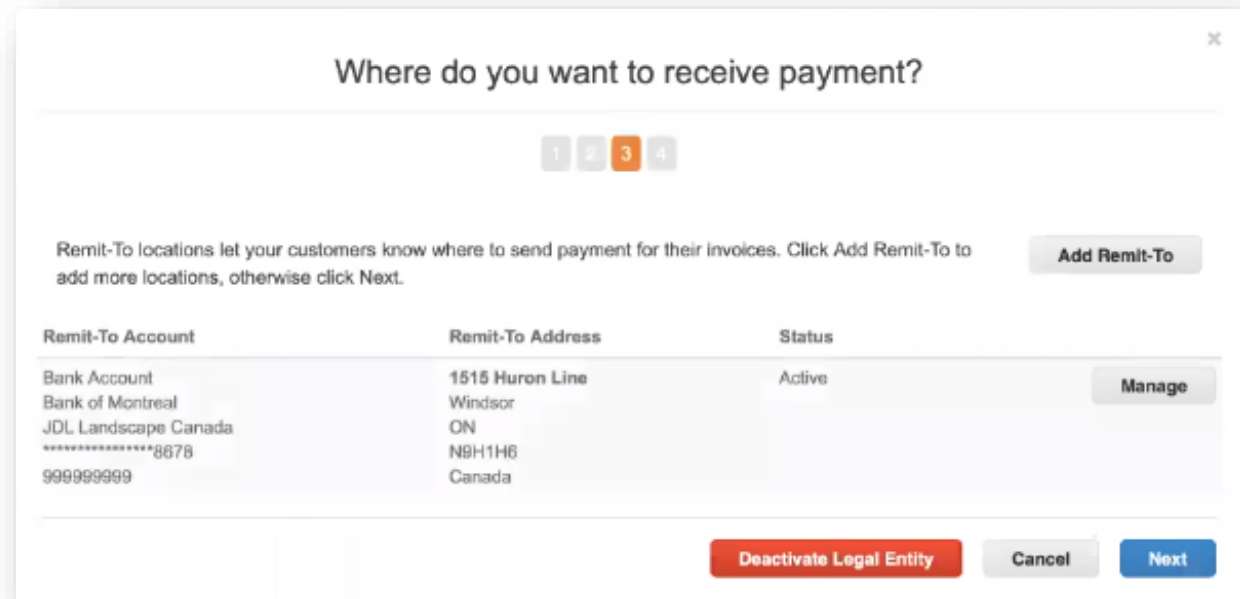
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Legal Entity Setup – International Suppliers

- 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.

- Otherwise, click *Next*.

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Legal Entity Setup – International Suppliers

- Click Add Ship From and enter the appropriate address information if the ship from address differs from the remit-to address.

- Otherwise, click *Done*.

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Legal Entity - Setup Complete

- Supplier setup is now complete and invoice processing can begin.

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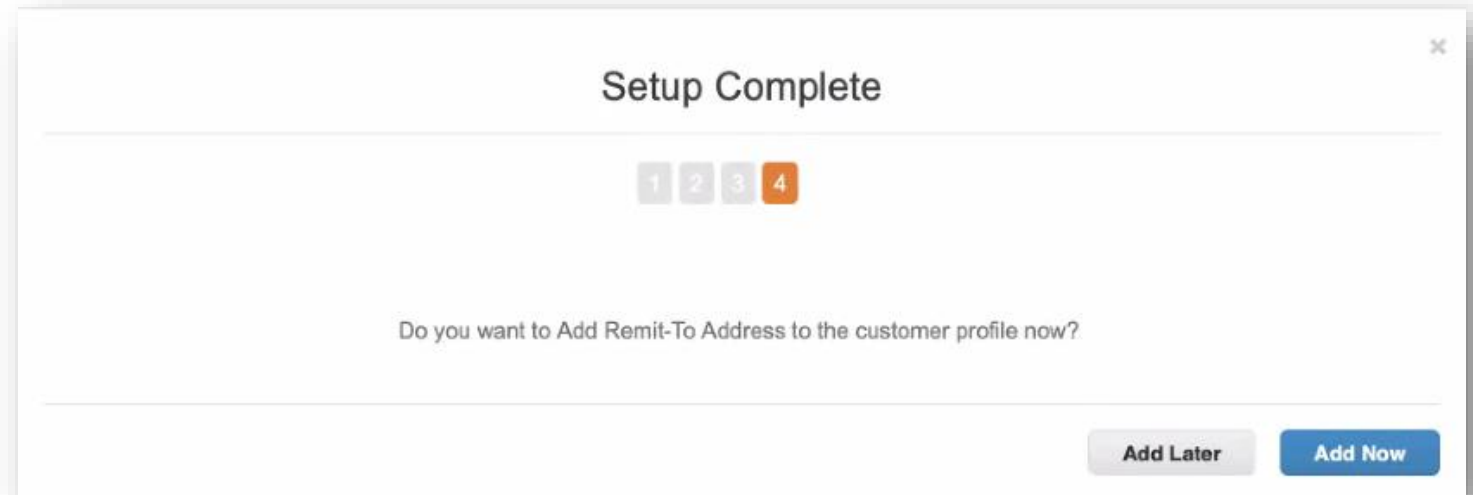
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Admin

- 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.

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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.
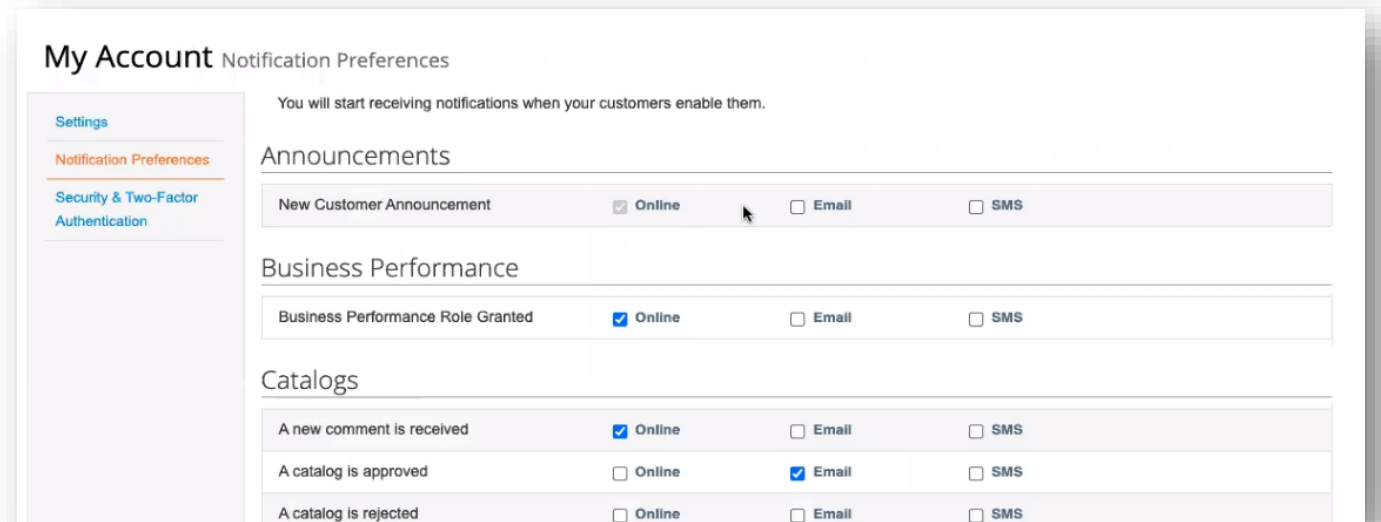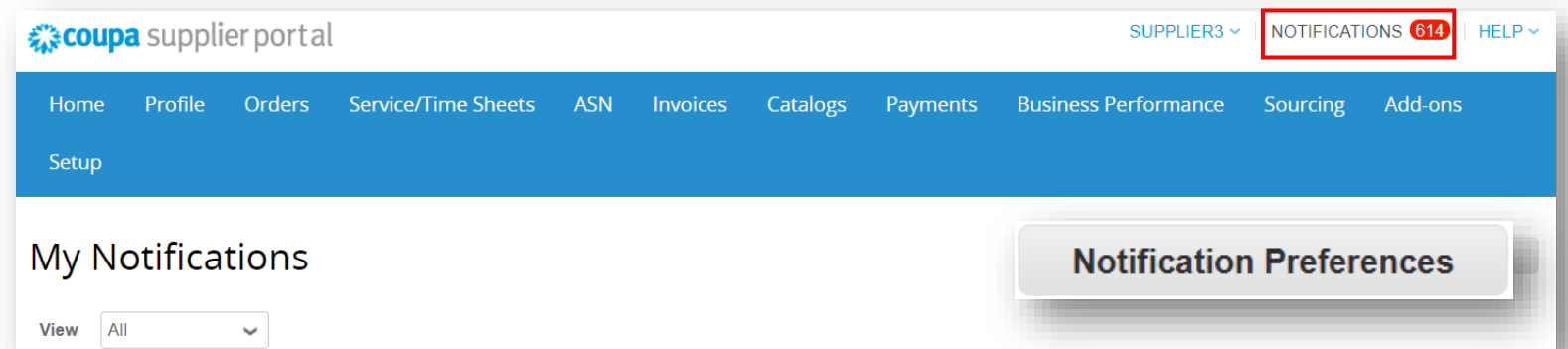
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Merging Accounts

- 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.

THANK YOU