



Coupa Supplier Portal: Getting Started

9/23/2021

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.

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below the navigation bar, there is a 'Recommended' section with a message: 'Complete your profile to get paid faster and get discovered'. This section includes a 'Profile Progress' indicator with four icons, a 'Last Updated' timestamp of '5 days ago', and an 'Improve Your Profile' button. The main content area is titled 'Profile Summary' and features three cards: 'Legal Entities' with a count of 2, 'Registered User' with a count of 1, and 'Connected Customers' with a count of 3. Below these cards, there are several status indicators: 'Banking Info' (checked), 'Diversity' (unchecked), 'Accelerate' (unchecked), and 'Bribery Policy' (unchecked). The bottom section is titled 'UAT Supplier - CA UAT Test' and contains a globe icon and a list of details: Website (http://guildfordlorris.com), Industry, About, Established, Top Commodities (Reproduction services), Currencies, and Public Profile (Profile). On the right side of the interface, there are sections for 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'.

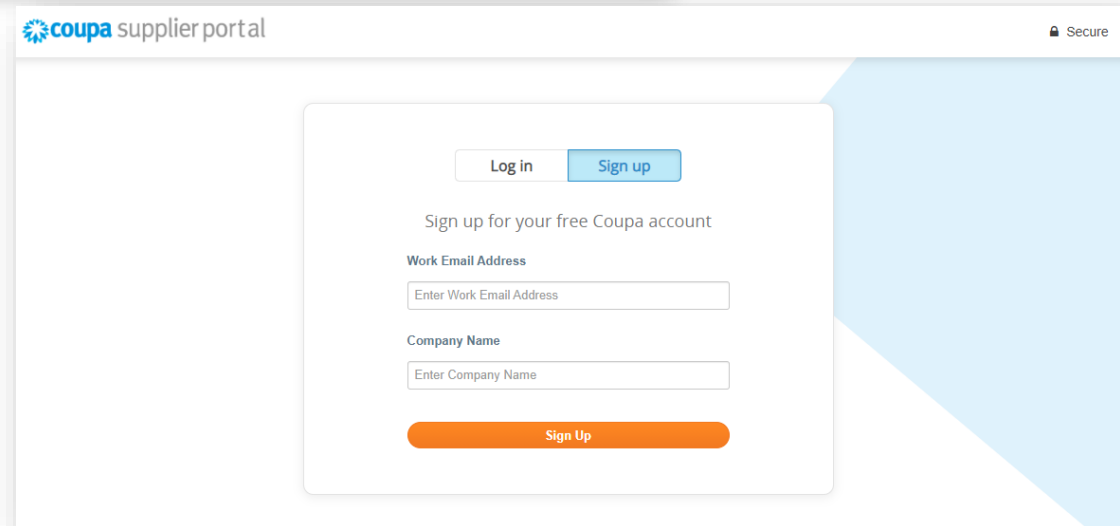
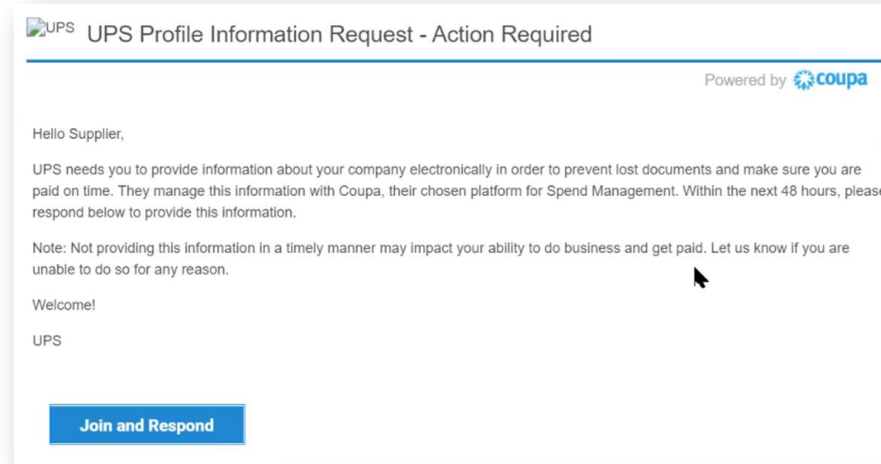
Coupa Supplier Portal – Getting Started

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).



Coupa Supplier Portal – Getting Started


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.

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](#)

[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

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Pay Me Now

Business Performance

Sourcing

Coupa Supplier Portal – Getting Started

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](#).

The screenshot shows the 'Tell us about your business' form in the Coupa Supplier Portal. The form is titled 'Tell us about your business' and includes a progress bar with three steps: Basics (active), Payment, and Profile. The form fields are as follows:

- Company Name:** New Supplier Onboarding - Test Form (marked with an asterisk). Below the field is the text 'Your official registered company name'.
- Website:** Empty text field.
- Country/Region:** Dropdown menu (marked with an asterisk).
- Address Line 1:** Empty text field (marked with an asterisk).
- Address Line 2:** Empty text field.
- City:** Empty text field (marked with an asterisk).
- State:** Empty text field.
- Postal Code:** 42202 (marked with an asterisk).

Below the address fields, there are three checked checkboxes under the heading 'Also use this address as':

- Invoice-from location** (Must match your official registered company address)
- Pay to location (Remit-To)**
- Ship from location**

At the bottom, there is an unchecked checkbox for 'Advanced invoicing' with the text 'We support integration for invoicing (cXML or SFTP) and plan to use it with UPS'. An orange 'Next' button is located at the bottom right of the form.

Coupa Supplier Portal – Getting Started

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](#).

The screenshot displays the 'Provide your default bank information' page in the Coupa Supplier Portal. At the top, a progress bar shows 'Basics' as completed and 'Payment' as the current step. The page title is 'Provide your default bank information'. Below the title, there is a section for 'Bank Information' with the following fields: Country/Region (pre-filled with 'US'), Currency (pre-filled with 'USD'), ACH Routing Number, Wire Routing Number, Account Number, Confirm Account Number, Bank Name, Address Line 1, Address Line 2, City, State (dropdown menu), and Postal Code. A 'Card Payment' section is also visible, featuring a checkbox for 'I accept card payment' and a 'Send to email address' field. A 'Next' button is located at the bottom right of the form.

Coupa Supplier Portal – Getting Started

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](#).

Would you like to offer discounts to get paid faster? ⓘ

🏠 Payment Discount Preferences

Your default payment term	Automatically replace with this discount (you can change this later)
Net 30 ▶	None ▼
Net 45 ▶	None ▼
Net 60 ▶	None ▼
Net 75 ▶	None ▼
Net 90 ▶	None ▼
Net 120 ▶	None ▼

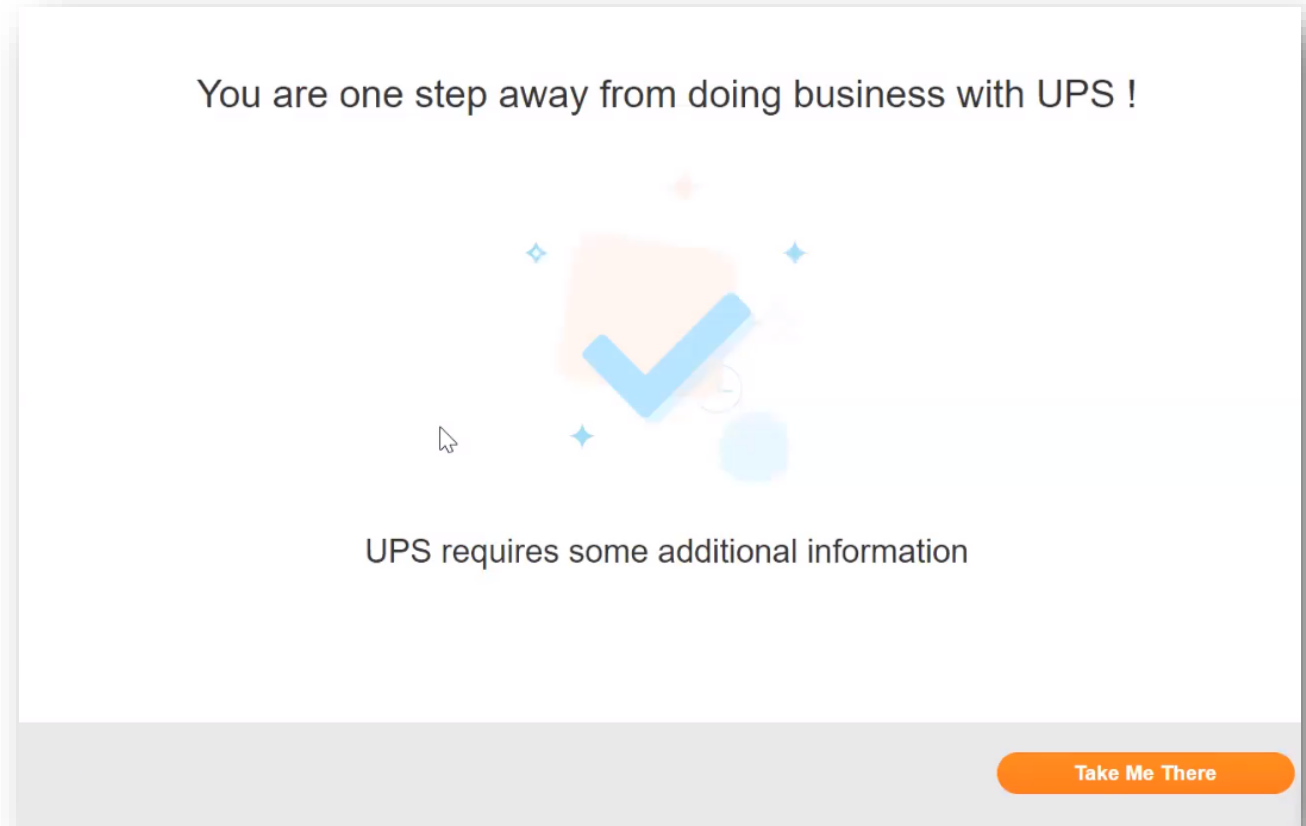
Use these preferences for all your customers

Back Next

Coupa Supplier Portal – Getting Started

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*.



Coupa Supplier Portal – Getting Started

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.

The screenshot displays the 'coupa supplier portal' interface. The user is logged in as 'MANOJ' and has one notification. The navigation menu includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', and 'Business Performance'. The 'Profile' tab is active, and the 'Information Requests' sub-tab is selected. The profile name is 'UPS'. A message states: 'We have auto-filled some information from your Public Profile.' Below this, the 'Supplier Information' section is titled 'New Supplier Onboarding - Test Form'. The 'Supplier Information Request Form' asks for requested information. The 'Company Information' section includes a dropdown for 'Supplier Country' (United States) and a text field for 'Tax Reporting Name' (New Supplier Onboarding -). A red box highlights the 'Tax Reporting Name' field, and a red arrow points from the text notes to it. Other fields include 'Doing Business As Name' and 'Business Entity Type' (Select). The 'Headquarter Address' section is partially visible at the bottom.

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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*

* Primary Contact (Only one can exist)

* First Name

* Last Name

* Email address ⓘ

Mobile Phone US/Canada ⓘ
650-555-1212

* Work Phone US/Canada ⓘ
650-555-1212

Fax US/Canada ⓘ
650-555-1212

Industry (NAICS)

DUNS Number ⓘ

* Preferred Currency USD

* PO Email ⓘ

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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 file into the [Drop files here](#) box to attach the necessary tax documents (W8 or W9).

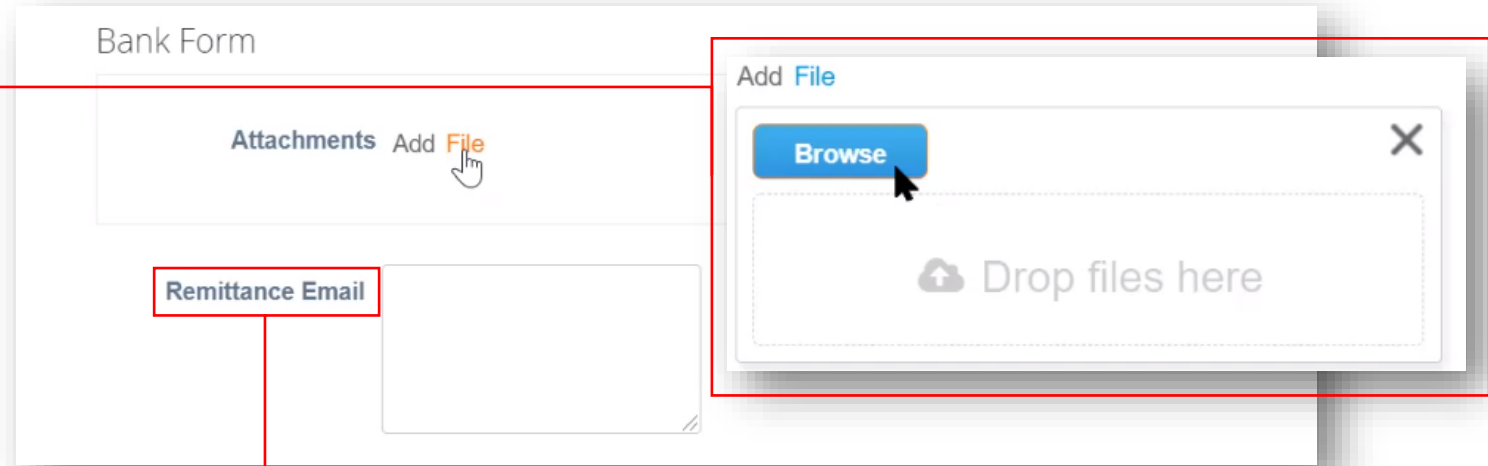
The screenshot displays the 'Tax Information' form in the Coupa Supplier Portal. The form is divided into sections for 'Federal Tax Form' and 'State Tax Form'. In the 'Federal Tax Form' section, the 'Tax Classification' dropdown is set to 'Vendor', 'Tax ID Type' has 'TIN' selected, and the 'Federal Tax ID' field contains '123345678'. A red box highlights these three fields. Below this, the 'Attachments' dropdown is open, showing 'W8' and 'W9' options, with 'W9' selected. A red box highlights this dropdown. In the 'State Tax Form' section, there is a 'Type' dropdown and an 'Attachments Add File' link. A red box highlights the 'Attachments Add File' link. A separate callout box on the right shows a close-up of the 'Attachments Add File' area, featuring a blue 'Browse' button and a dashed box labeled 'Drop files here' with a cloud icon. Red arrows point from the text instructions on the left to these specific UI elements.

Coupa Supplier Portal – Getting Started

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.



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

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

Update Existing Remit to Information

Please activate or deactivate an existing remit to address listed below

Validation Results None

Choose Remit-To Address

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

902, Hedge Street
Post park, 1122 Road
New York, 42202
United States
United States

Bank Account (Swift Bank)

Choose

Decline Save **Submit for Approval**

+ Create New Remit-To Address

Coupa Supplier Portal – Getting Started

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

Coupa Supplier Portal – Getting Started

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*.

Miscellaneous Information

1 2 3 4

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 JDL Landscape Canada

Country/Region Canada

PST/QST Registration Number

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Cancel Save & Continue

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.

Coupa Supplier Portal – Getting Started

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.

The screenshot shows a web form for legal entity setup. At the top, there is a dropdown menu for 'Country/Region' set to 'Canada'. Below it is a text input field for '* VAT ID' with a red asterisk, and a checkbox labeled 'I don't have a VAT/GST Number'. The main form has a heading 'What is your Tax ID?' with an information icon. Below this is a 'Country' dropdown set to 'United States' and a 'Tax ID' text input field. A checkbox 'I don't have Tax ID Number' is also present. A blue link 'Add additional Tax ID' is located below the main form. The 'Miscellaneous' section includes an 'Invoice From Code' text input field with an information icon, and a 'Preferred Language' dropdown set to 'English (US)'. At the bottom right, there are 'Cancel' and 'Save & Continue' buttons.

Coupa Supplier Portal – Getting Started

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](#).

Where do you want to receive payment?

1 2 3 4

* Payment Type Address

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.

Add Remit-To

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

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](#).

Where do you want to receive payment?

1 2 3 4

* Payment Type Bank Account

What are your Bank Account Details? *i*

Bank Account Country/Region: Canada

Bank Account Currency: CAD

Beneficiary Name: JDL Landscape Canada

Bank Name:

Account Number: *i*

Confirm Account Number:

Transit/Institution Number: *i*

SWIFT/BIC Code: *i*

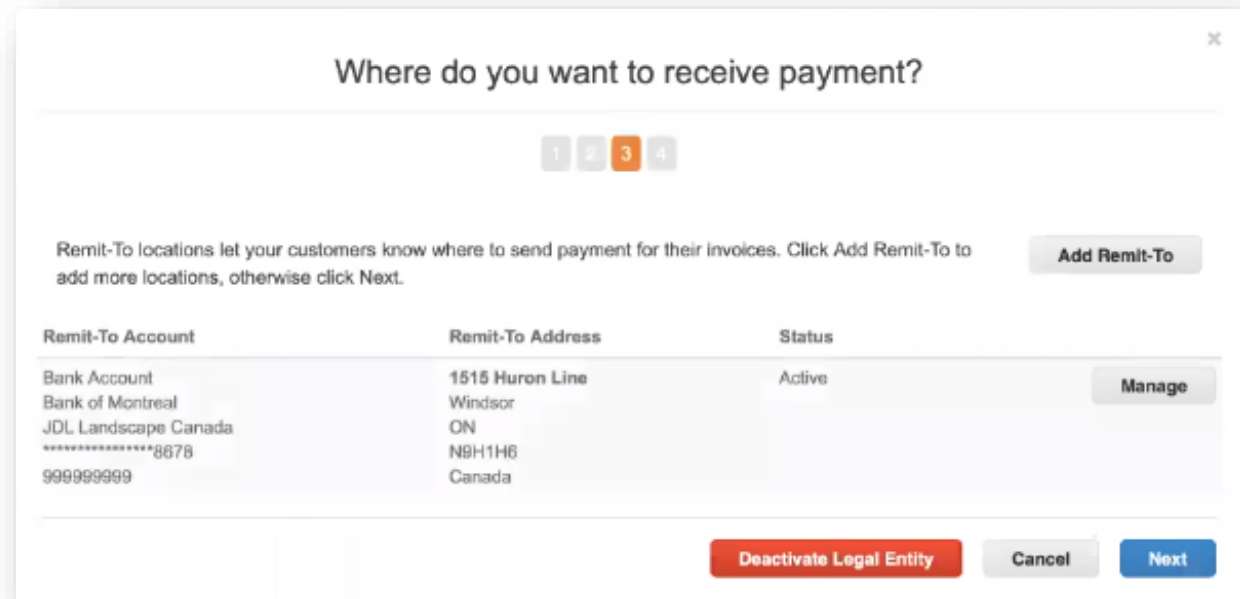
Bank Account Type: Business

Supporting Documents Choose Files no files selected *i*

Coupa Supplier Portal – Getting Started

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](#).



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.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account Bank of Montreal JDL Landscape Canada *****8678 999999999	1515 Huron Line Windsor ON N9H1H6 Canada	Active	Manage

Deactivate Legal Entity Cancel Next

Coupa Supplier Portal – Getting Started

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*.

Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. [Add Ship From](#)

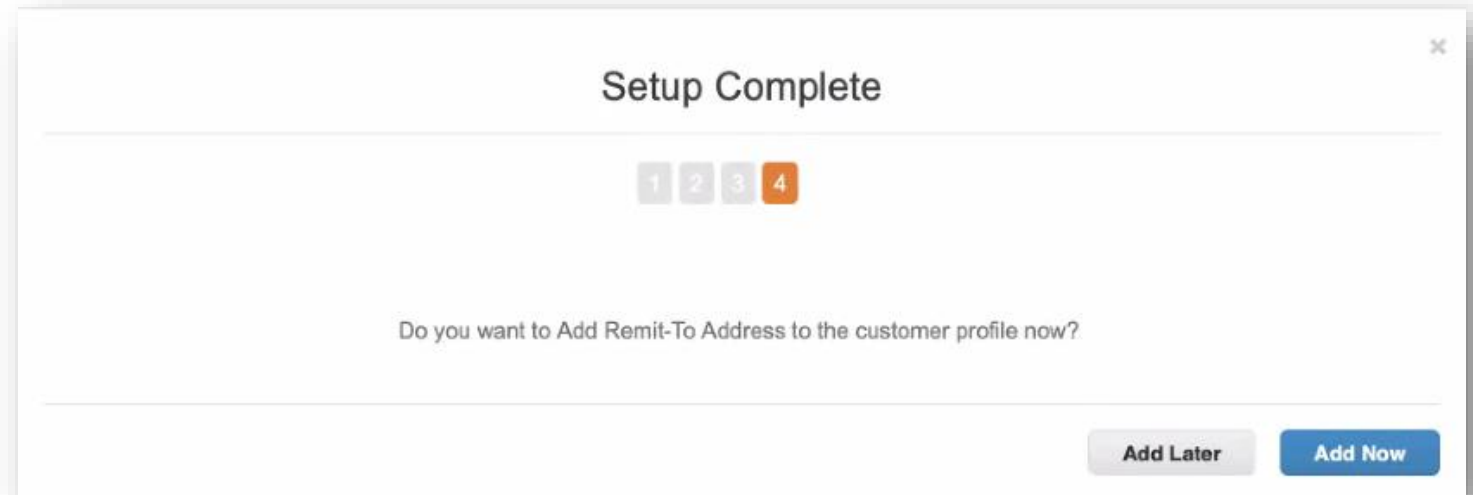
Title	Status	
1515 Huron Line Windsor ON N9H1H6 Canada	Active	Manage

[Deactivate Legal Entity](#) [Done](#)

Coupa Supplier Portal – Getting Started

Legal Entity - Setup Complete

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



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. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right side of the navigation bar, there are links for 'ZIP', 'NOTIFICATIONS 62', 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' button is highlighted in the menu. Below the menu, there are tabs for 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' tab is selected, and the page title is 'Admin Users'. On the right side of the page, there is an 'Invite User' button. On the left side, there is a sidebar menu with options: Users, Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, SFTP Accounts, cXML Errors, and SFTP Errors. The main content area shows a table with columns for 'Users', 'Permissions', and 'Customer Access'. The table contains one row for a user named 'Zip Signs' with email 'zip.signs.supplier@gmail.com' and status 'Active'. The permissions listed for this user are: ASNs, Admin, Business Performance, Catalogs, Invoices, Order Changes, Orders, Pay Me Now, Payments, Profiles, Service/Time Sheets, and Sourcing. The customer access is listed as 'UPS'. There is an 'Edit' button next to the user information.

Users	Permissions	Customer Access
Zip Signs zip.signs.supplier@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	UPS

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 'Admin Users' page in the Coupa Supplier Portal. The 'Invite User' modal is open, displaying the following fields and options:

- First Name:** [Text Input]
- Last Name:** [Text Input]
- * Email:** [Text Input]
- Permissions:**
 - All
 - Admin
 - Orders
 - Restricted Access to Orders
 - All
 - Invoices
 - Catalogs
 - Profiles
 - ASNs
 - Service/Time Sheets
 - Restricted Access to Service/Time Sheets
 - All
 - Payments
 - Order Changes
 - Pay Me Now
 - Business Performance
 - Sourcing
- Customers:**
 - All
 - UPS - CRP Supplier 3
 - UPS - P035_30754_FLDELRA2200_OL_OFFICE DEPOT
 - UPS QA - P035_3313610_TXDALLAPOBOKA731_BEST BUY FOR BUSINESS
 - UPS QA - UAT Supplier - Milind

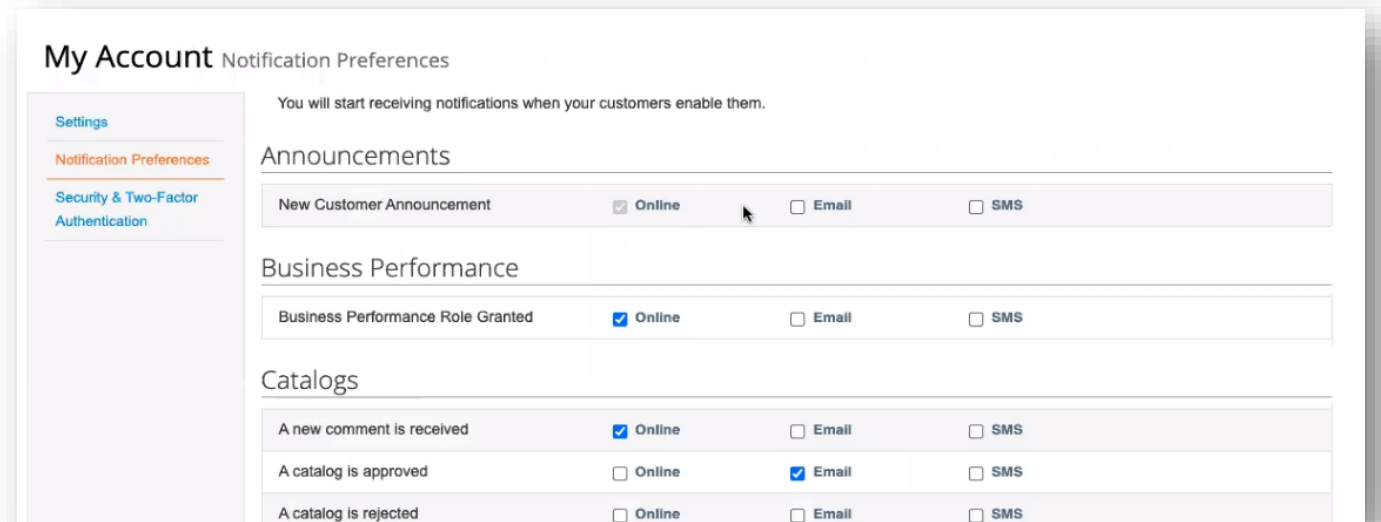
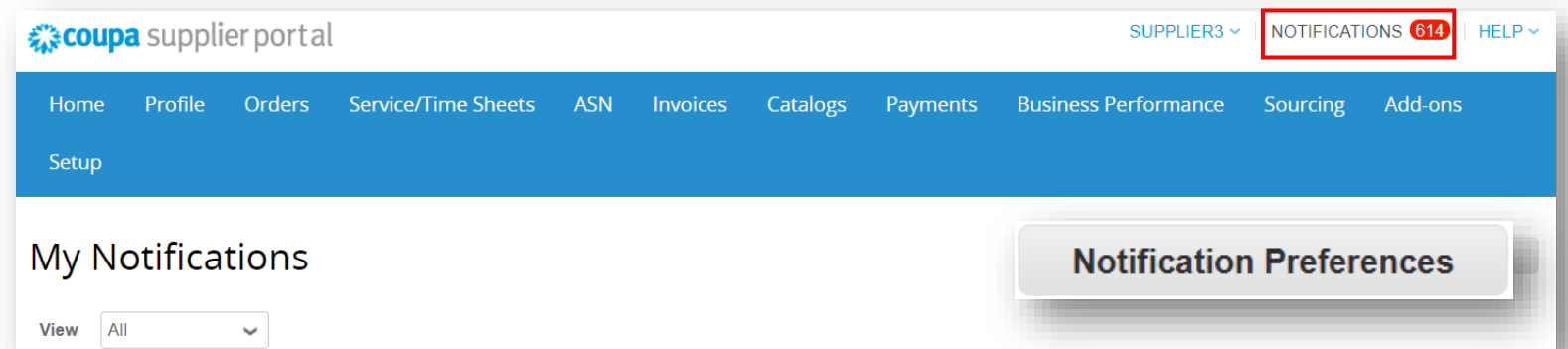
Buttons: Cancel, Send Invitation

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 and navigation menu are visible. The main content area features a 'Profile Progress' section with a 16% completion bar and a 'Last Updated' timestamp of 18 days ago. Below this is a 'Profile Summary' section with three cards: '6 Legal Entities', '1 Registered User', and '4 Connected Customers'. A red arrow points to the 'Merge Accounts' section, which contains instructions on how to merge multiple CSP accounts to reduce confusion.

Action needed: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress 16% Complete **Last Updated** 18 days ago [Improve Your Profile](#)

Profile Summary

- 6 Legal Entities [View](#)
- 1 Registered User [View](#)
- 4 Connected Customers

[Banking Info](#) [Diversity Info](#) [Accelerate](#) [Bribery Policy](#)

CRP Supplier 3

Announcements [View All \(1\)](#)

ATTENTION: (UPS QA)
Starting on 10/1, ONLY suppliers who provide goods/services to UPS locations in Georgia, North

One-Click Savings [View All](#)

Start saving today!
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

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.](#)



THANK YOU