



# Coupa Supplier Portal: Getting Started

8/26/2024

# 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, a 'Recommended' section suggests completing the profile to get paid faster and get discovered, with a 'Learn More' link and an 'Improve Your Profile' button. The 'Profile Progress' section shows a progress bar with four icons, and the 'Last Updated' section indicates it was updated 5 days ago. The 'Profile Summary' section features three cards: '2 Legal Entities' (View), '1 Registered User' (View), and '3 Connected Customers'. Below this, there are tags for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The 'UAT Supplier - CA UAT Test' section displays 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, there are sections for 'Announcements', 'One-Click Savings' (Start saving today! Explore deals for your company, exclusive to the Coupa Community.), 'Merge Accounts' (If your company has multiple CSP accounts, merge them to reduce confusion for your customers. Learn more. Request Merge), and 'Latest Customers' (UPS - Test -For Equifax, UPS - Test 2 Manoj).

# Coupa Supplier Portal – Getting Started

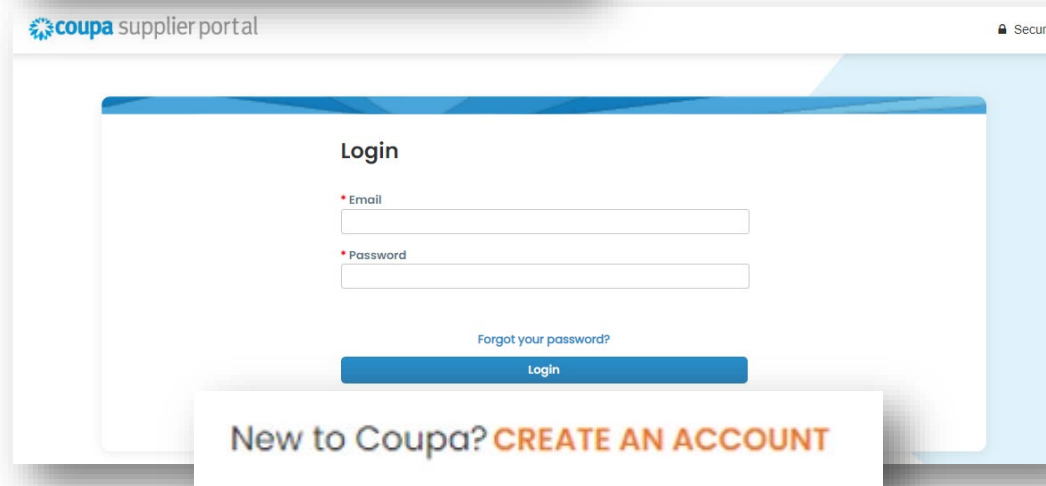
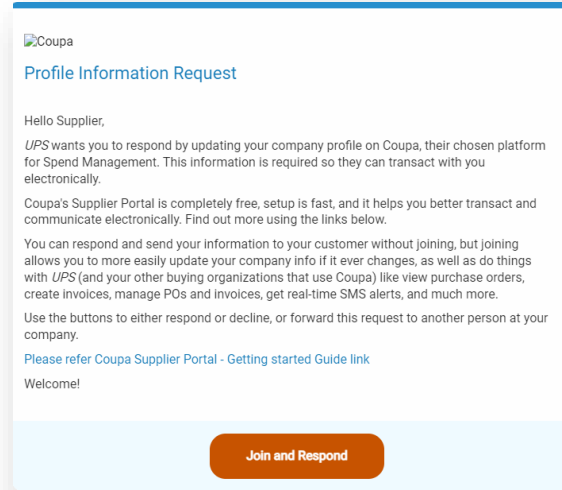
## Invitation/Registration

- New and 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](mailto: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).

*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

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](mailto:supplyline@ups.com).*

**1** **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](#)

**2**

< Back

### Email Verification

We sent a one time verification code to [ups.supplier.testing@outlook.com](mailto: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 (optional)

- Once the new account has been created, Coupa will present suppliers with a series of business-related, general information pages.

*Note: The information on these pages will not be used for UPS transactions and completing these forms is optional*

- Complete all required fields (if elected), then click [Next](#).
- If not, click [Skip for Now](#) to continue.

The image displays a sequence of five overlapping screenshots from the Coupa Supplier Portal, illustrating the setup process. The screens are:

- Identify Your Product Categories**: A screen with a 'Back' button and a close button.
- Get Paid Faster with Early Pay Discounts**: A screen with a 'Back' button and a close button, featuring the Coupa logo and a brief description of the program.
- Customize Your Profile**: A screen with a 'Back' button and a close button.
- Confirm Invoice-From Location**: A screen with a 'Back' button and a close button, including a note about the main address of the registered business.
- Tell Us About Your Business**: A screen with a 'Back' button and a close button, containing a form titled 'Your Contact Information' with the following fields:
  - \* First Name: JOHN
  - \* Last Name: JOHNSON
  - \* Phone Number: [Empty field]
  - \* Country/Region: [Dropdown menu]
  - \* Address: [Empty field]
  - \* City: [Empty field]
  - State: [Empty field]
  - \* Postal Code: [Empty field]At the bottom of the form are two buttons: a blue 'Next' button and a 'Skip for Now' link.

# Coupa Supplier Portal – Getting Started

## *Coupa Verified vs. Free*

- Finally, Coupa will present you with an offer to be “Coupa Verified” for a monthly fee.
- UPS DOES NOT recommend paying for Coupa verification.
- Suppliers can create and update their profiles using Coupa’s free services.
- Click the “X” in the upper right corner of the dialogue box to exit the screen and return to the profile setup.

	<input checked="" type="checkbox"/> Coupa Verified	Free
Searchable company profile	✓	✓
Catalog management	✓	✓
Orders management	✓	✓
Invoices management	✓	✓
Payments management	✓	✓
Payment readiness via bank account verification	✓	✗
Prominent Verified badge on your company profile ⓘ	✓	✗
Top of search on buyers' search results ⓘ	✓	✗

**Continue with Coupa Verified** 46 USD per month

**Continue with Free** free forever

# Coupa Supplier Portal – Getting Started

## Two-Factor Authentication

- Suppliers must complete the Two-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](#).
- In the [Multi Factor Authentication App](#) pop-up window, click [Cancel](#) to receive a code via text message or download an authenticator app, click [Enable](#), and follow the additional steps.

The image shows a screenshot of the Coupa Supplier Portal interface. At the top, the user's name 'JOHN' is displayed, along with 'NOTIFICATIONS 0' and 'HELP'. A navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Account Settings, Notification Preferences, and Setup. The 'My Account Settings' section is active, with a sidebar menu containing 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication'. The 'Security & Multi Factor Authentication' option is highlighted with a red box. Below this, the 'User Details' section shows input fields for 'First Name' (JOHN) and 'Last Name' (BROOK). A pop-up window titled 'Multi Factor Authentication App' is overlaid on the page. It contains instructions for scanning a QR code and entering a 6-digit verification code. The QR code is labeled 'Coupa Supplier Portal' and has a security key 'W4GOUN4FHS6E5RTHN2RLTL4A V2HTEDML'. Below the QR code is a 'Code' input field. At the bottom of the pop-up, there are 'Cancel' and 'Enable' buttons. Red arrows point from the text in the list to the corresponding elements in the screenshot: one from 'Account Settings' and 'Security & Multi Factor Authentication' to the sidebar menu, and another from 'click Cancel to receive a code' to the 'Cancel' button in the pop-up.



# Coupa Supplier Portal – Getting Started

## Two-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

A screenshot of the Coupa Supplier Portal interface. The page title is 'My Account Security &amp; Multi Factor Authentication'. On the left, there is a sidebar menu with 'Settings', 'Notification Preferences', and 'Security &amp; Multi Factor Authentication' (which is highlighted). The main content area is titled 'Multi Factor Authentication' and has three radio button options: 'Disabled', 'For Payment Changes (Required for changing Legal Entity or Remit-To)', and 'For Both Account Access (Login) and Payment Changes'. The 'For Both Account Access' option is selected. Below these options are two boxes: 'Via Authenticator App' and 'Via Text Message'. The 'Via Text Message' box is highlighted with a blue border, and its radio button is also highlighted with a red square. A red arrow points from the 'Via Text Message' option in the screenshot to the 'Via Text Message' option in the list above.

# 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.*

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

The screenshot shows the 'Information Requests' page in the Coupa Supplier Portal. The page title is 'UPS - Supplier Testing COUPA'. A dropdown menu for 'Profile' is set to 'UPS - Supplier Testing COUPA'. A green message box states: 'We have auto-filled some information from your Public Profile.' Below this, there is a section for 'Supplier Information' with the text 'Supplier Testing 11/16/2023'. The main section is 'Supplier Information Request Form', which includes a sub-section for 'Company Information'. The 'Tax Reporting Name' field is highlighted with a red box and contains an asterisk, indicating it is a required field. Below it is a text input field with the placeholder text 'Enter the company name as it appears on your official tax document or as registered with the local tax authority.' Another field for 'Doing Business As Name' is visible below.

# Coupa Supplier Portal – Getting Started

## Create 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

*Note to Canadian suppliers: Depending on the region/country of operation, attachment of up to three (3) certificates of insurance may be required and the attachment fields will appear in sequential order (i.e. Certificate of Insurance – 1, Certificate of Insurance -2, Certificate of Insurance – 3)*

The screenshot shows a form with the following sections:

- \* Supplier working in a UPS facility**: A dropdown menu with "Yes" selected. A red box highlights this section, and a red arrow points from the text in the bullet point above to it. Below the dropdown, it says "COI is mandatory for supplier working on UPS facility".
- \* Certificate of Insurance**: A section containing:
  - \* Type**: A dropdown menu.
  - Effective Date**: A date input field with the format "mm/dd/yy" and a calendar icon.
  - \* Expiration Date**: A date input field with the format "mm/dd/yy" and a calendar icon.
  - \* Attachments**: A section with a link "Add File".
  - Description**: A text input field with a small icon in the bottom right corner.

# Coupa Supplier Portal – Getting Started

## 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 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](mailto:jsmith@supplier.com) may be the primary contact and [orders@supplier.com](mailto:orders@supplier.com) may be where purchase orders are received*

- In the [Preferred Currency](#) section update the currency of invoices issued to UPS.

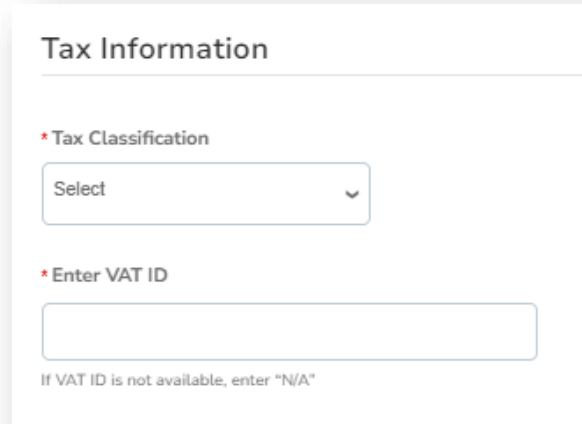
The screenshot shows the 'Primary Contact' form in the Coupa Supplier Portal. The form is titled 'Primary Contact' and contains several fields:

- \* First Name**: A text input field.
- \* Last Name**: A text input field.
- \* Email address**: A text input field with a blue information icon to its right.
- Mobile Phone**: A dropdown menu set to 'US/Canada' and a text input field containing '650-555-1212'.
- \* Work Phone**: A dropdown menu set to 'US/Canada' and a text input field containing '650-555-1212'.
- Contact Purpose**: A dropdown menu with the text 'Select Some Options' and a blue information icon to its right.
- \* Preferred Currency**: A dropdown menu set to 'EUR'.
- \* PO Email**: A text input field with a blue information icon to its right.

# Coupa Supplier Portal – Getting Started

## Create 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.



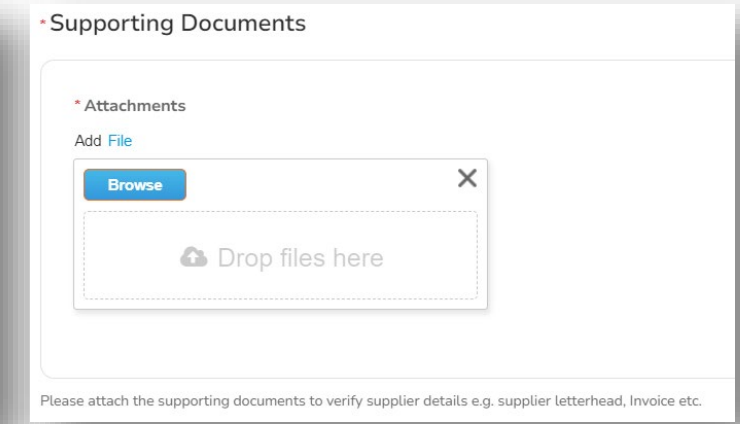
**Tax Information**

\* Tax Classification

Select

\* Enter VAT ID

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

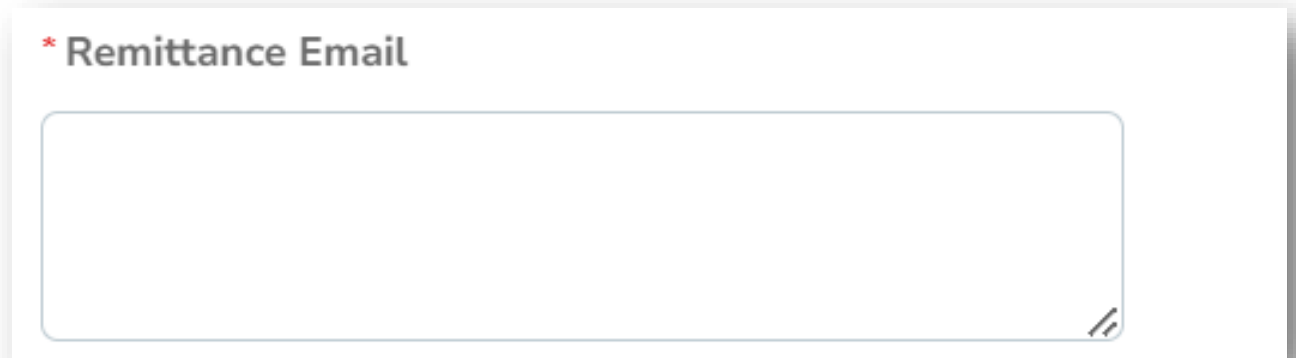


**Supporting Documents**

\* Attachments

Add [File](#)

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



**\* Remittance Email**

# 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](#).

The screenshot shows the 'Remit-To Addresses' section of the Coupa Supplier Portal. At the top, there is a heading '\* Remit-To Addresses' and a sub-heading 'Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.' Below this, a blue button labeled 'Add Remit-To' is highlighted with a red box. Below the button, a modal dialog titled 'Choose Remit-To Address' is open. The dialog has a blue header with a close button. Inside, a yellow banner reads 'This customer requires you to choose a Remit-To Address that includes payment information.' Below the banner, the text 'Choose existing or create new Remit-To Address:' is displayed. There are two rows of address information, each with a 'Choose' button highlighted by a red box. The first row shows '6303 WATERFORD DISTRICT DR STE 350 MIAMI, FL 33126 United States United States' and 'Bank Account (CITI BANK)'. The second row shows '3375 Spring Hill Pkwy SE Smyrna GA 30080' and 'Bank Account (WELLS FARGO BANK)'. At the bottom of the dialog, a button labeled '+ Create New Remit-To Address' is highlighted with a red box, and a 'Cancel' button is visible in the bottom right corner.

# 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.



# Coupa Supplier Portal – Getting Started

## Create Profile – Remit-To Address

- On the Miscellaneous Information popup window enter the required details marked with asterisk\*.
- Click [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

\* Country/Region

\* Co Reg Num.

\* Place of Reg.

\* Register Legal Entities

Liquidation State

\* Type of Company

License Number

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

# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup

- On the [Tell your customers about your organization](#) screen, select the customers that should see your information and enter an invoicing address.
- In the [What address do you invoice from](#) section, complete the required fields
- If the same address will be used as the remit-to and ship-from address leave the boxes beneath the address fields checked.
- 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 (page 10) and Remit-To Address sections
- Note: Although not marked with an asterisk the [State field](#) is a mandatory field.

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/Region United States

Use this address for Remit-To

Use this for Ship From address

**REQUIRED FOR INVOICING**

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

# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup

- Enter *Tax ID*, if applicable.
- The *Invoice From Code* is for use 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 remit-to address.
- Click *Save & Continue* to continue the setup process.

What is your Tax ID? i

Country/Region  x

\* VAT ID

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  i

Preferred Language

# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup

- On the [Where do you want to receive payment?](#) page, in the *Payment Type* field, select *Bank Account* if payment to a bank is preferred. Select *Address* if payment by check is preferred.

- Update valid *IBAN* and *SWIFT/BIC Code* if available.

*Note: Banking information is not stored in Coupa.*

- Click [Save & Continue](#).

Where do you want to receive payment?

1 2 3 4

\* Payment Type Bank Account

Address  
Bank Account  
Virtual Card

What are your Bank Account Details? *i*

Bank Account

Country/Region:

Bank Account Currency:

Beneficiary Name:

Bank Name:

IBAN:  *i*

Confirm IBAN:

SWIFT/BIC Code:  *i*

My bank does not have a BIC code

Branch Code:

Bank Account Type: Business

Supporting Documents  No file chosen *i*

Email Address  *i*

# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup

- Verify the account and address information is correct.
- Click *Next*.
- Then click *Done*.

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

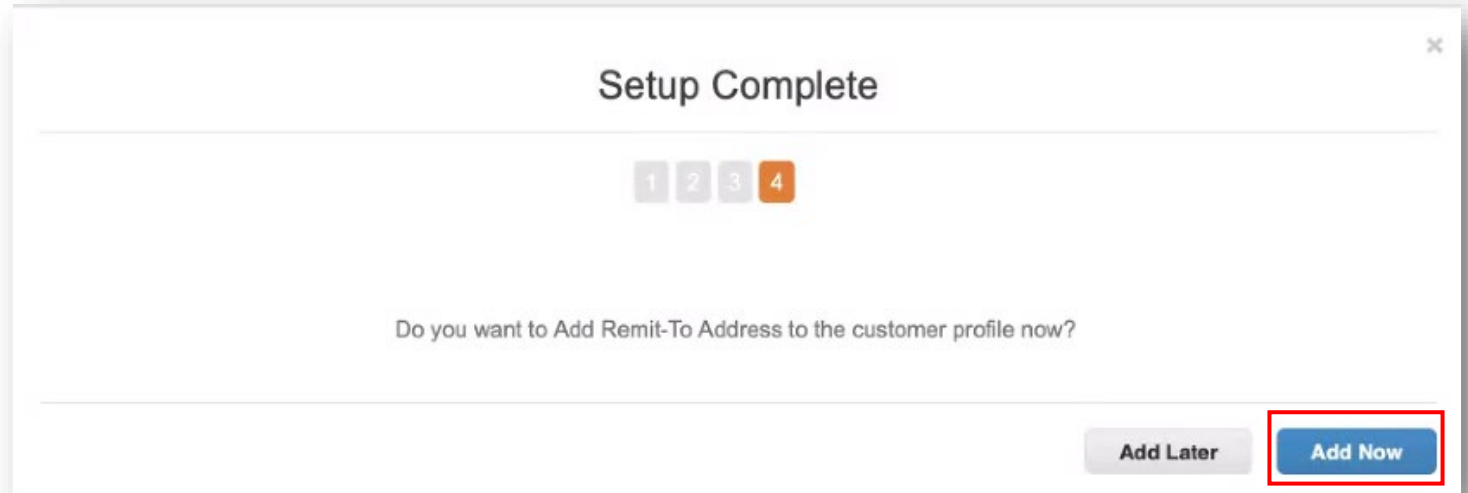
Deactivate Legal Entity Cancel **Next**

Deactivate Legal Entity **Done**

# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup - Setup Complete

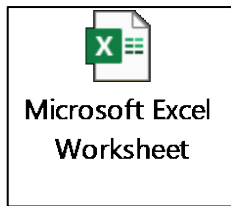
- Supplier setup is now complete, and invoice processing can begin.
- To add the remit-to address to the customer profile, click the [Add Now](#) button and see the next slides, if applicable.



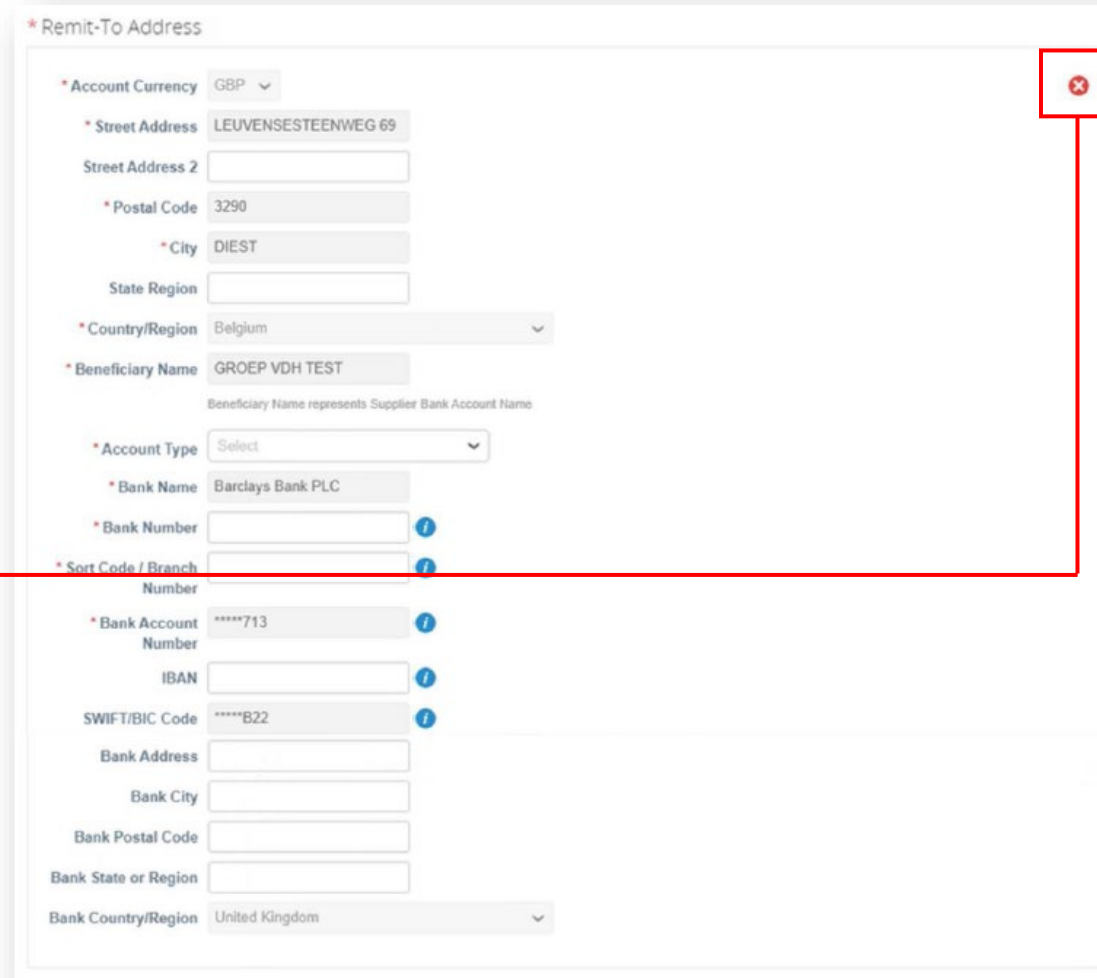
# Coupa Supplier Portal – Getting Started

## Remit-To Address

- Ensure to Review [Remit-To Address](#) section and complete all fields with asterisk mark.\*
- Refer below excel to enter banking details.



- 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

A screenshot of the "Remit-To Address" form in the Coupa Supplier Portal. The form is titled "Remit-To Address" and contains several fields, many of which are marked with an asterisk (\*). The fields include: Account Currency (GBP), Street Address (LEUVENSESTEENWEG 69), Street Address 2, Postal Code (3290), City (DIEST), State Region, Country/Region (Belgium), Beneficiary Name (GROEP VDH TEST), Account Type (Select), Bank Name (Barclays Bank PLC), Bank Number, Sort Code / Branch Number, Bank Account Number (\*\*\*\*713), IBAN, SWIFT/BIC Code (\*\*\*\*B22), Bank Address, Bank City, Bank Postal Code, Bank State or Region, and Bank Country/Region (United Kingdom). A red "X" icon is located in the upper right corner of the form, and a red arrow points from it to the "Note" in the text to the left. The form is set against a light gray background with a white border.

# 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.

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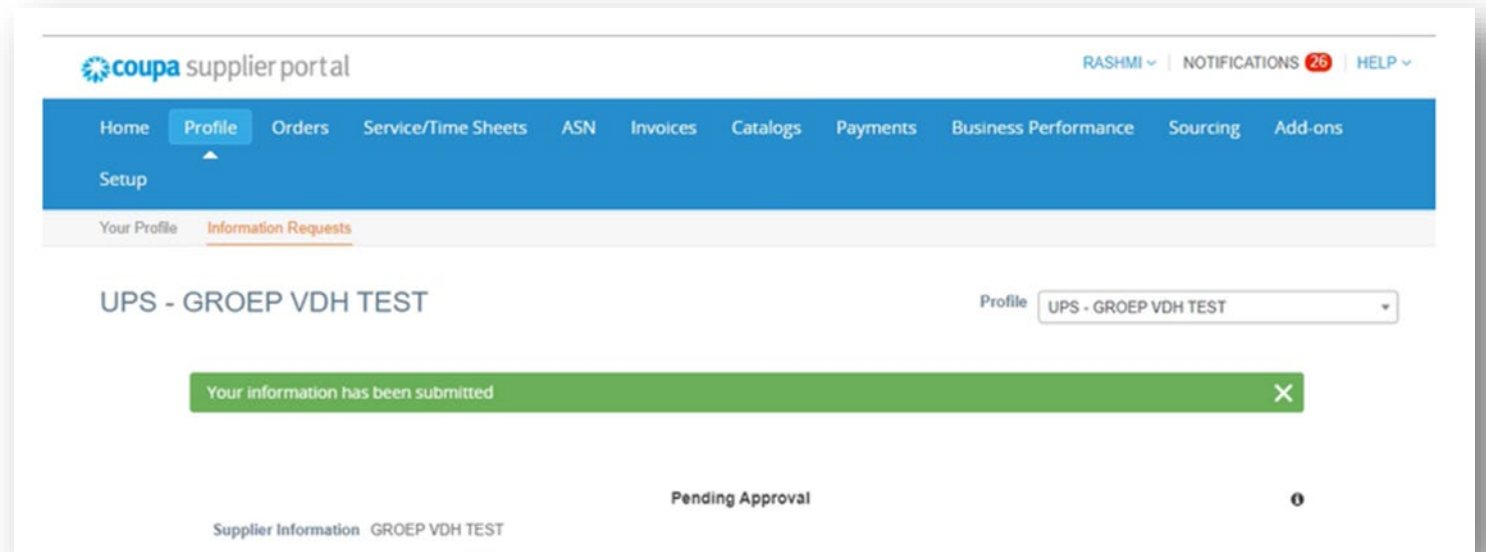
Decline Save Submit for Approval



# Coupa Supplier Portal – Getting Started

## Remit-To Address Setup

- Once submitted, a green banner will appear and the new or updated remit-to address will be pending approval by UPS
- Need assistance? Got questions? Email [supplyline@ups.com](mailto: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](mailto: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 three tabs: 'Admin' (selected), 'Customer Setup', and 'Connection Requests'. The main content area is titled 'Admin Users' and features an 'Invite User' button. On the left side, there is a sidebar menu with options: Users (selected), 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 displays 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 include 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'. An 'Edit' button is visible next to the user information.

Users	Permissions	Customer Access
Zip Signs zip.signs.supplier@gmail.com Status: Active <a href="#">Edit</a>	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\_TXDALLAPOB...
  - UPS QA - UAT Supplier - Milind

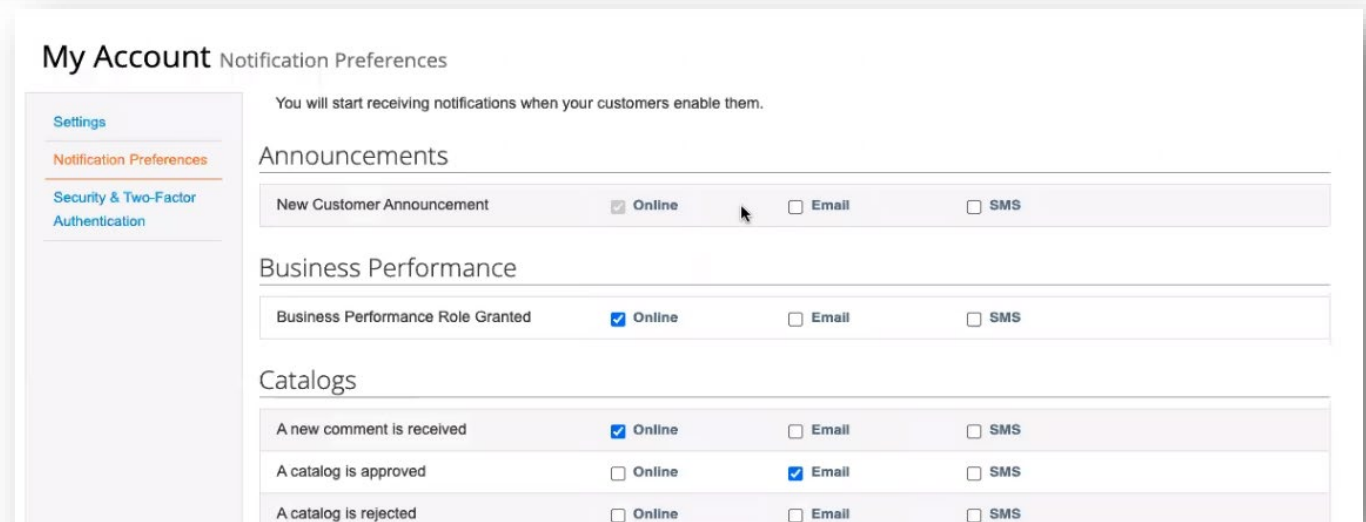
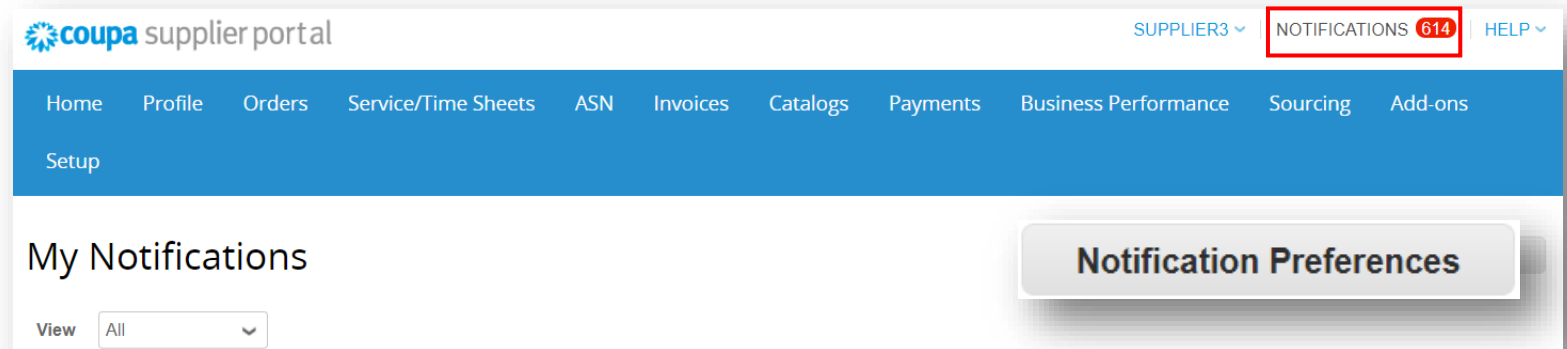
Buttons: Cancel, Send Invitation

# 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 '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 links for Home, 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 16% complete progress bar and 'Last Updated 18 days ago' with a clock icon and 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 on how to merge accounts and a 'Click here' link. A large red arrow points from the 'Merge Accounts' section towards the 'CRP Supplier 3' section.



Thank you for being a valued partner.