

Coupa Supplier Portal (CSP) - Admin

- I. How to Setup E-Invoicing
- II. How to Add Multiple Users

Updated February 8, 2021 by Thomas Anderson Jr

1. How to Setup E-Invoicing

1. Log into the **Coupa Supplier Portal**: <https://supplier.coupahost.com/orders>

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

The "Register" section is titled "Register" and has the sub-header "New to Coupa? Create Your Account." It contains four input fields: "First Name", "Last Name", "Company", and "Email". Below these fields is a blue "Register" button.

The "Log In" section is titled "Log In" and has the sub-header "Welcome back". It contains two input fields: "Email Address" (with the value "Jessica.Fernandez+CSPDerr") and "Password" (with masked characters "*****"). Below these fields is a blue "Log In" button and a link "Forgot Your Password?".

2. Click on the **Setup** tab

The screenshot shows the Coupa Supplier Portal navigation bar. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". On the right side of the header, there are links for "THOMAS", "NOTIFICATIONS" (with a red notification icon), and "HELP". Below the header, there is a blue navigation bar with the following tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Business Performance", "Sourcing", "Add-ons", and "Setup". The "Setup" tab is highlighted with a white background and a blue border.

3. Select **Legal Entity Setup** and then click the **Add Legal Entity** button

The screenshot shows the Coupa Supplier Portal Admin page. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". On the right side of the header, there are links for "THOMAS", "NOTIFICATIONS" (with a red notification icon), and "HELP". Below the header, there is a blue navigation bar with the following tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Business Performance", "Sourcing", "Add-ons", and "Setup". The "Setup" tab is highlighted with a white background and a blue border. Below the navigation bar, there is a sub-navigation bar with the following tabs: "Admin" (highlighted with a red underline) and "Customer Setup".

Admin Legal Entity Setup

The screenshot shows the Admin Legal Entity Setup page. On the left side, there is a sidebar with the following menu items: "Users", "Merge Requests", "Legal Entity Setup" (highlighted with a red underline), "Fiscal Representatives", "Remit-To", "Terms of Use", "Payment Preferences" (with a dropdown arrow), "Static Discounting", "SFTP Accounts", "cXML Errors", and "SFTP Errors".

The main content area is titled "Legal Entity" and contains a table with the following data:

Invoice From	Remit-To Accounts	Locations	Customers
6407 DOWER HOUSE RD SUIT 210 UPPER MARLBORO MD 20772 United States	Address Remit-To Address 6407 DOWER HOUSE RD SUIT 210 UPPER MARLBORO MD 20772 United States 1 customer Active	6407 DOWER HOUSE RD SUIT 210 UPPER MARLBORO MD 20772 United States	Clark Group TEST

At the top right of the main content area, there is a blue "Add Legal Entity" button. Below the table, there is a blue "Actions" button.

4. Complete all requested fields

Supplier Portal JESSICA NOTIFICATION

Where's your business located?

* Legal Entity Name

* Country

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

Supplier Portal JESSICA NOTIFICATION

Tell your customers about your organization

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country

Use this address for Remit-To

Use this for Ship From address

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

What is your Tax ID?

Country

Tax ID

I would like to use this as a local tax number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

5. Select the **Bank Info and Assign Customers** drop down to expand more fields.
(You may skip the **Banking Information** fields as they do not notify **Clark Group** of any updates.)

Bank Info and Assign Customers ▾

Banking Information i

Bank Name	<input type="text"/>
Beneficiary Name	<input type="text"/>
Account Number	<input type="text"/>
Routing Number (ABA)	<input type="text"/>
IBAN	<input type="text"/>
Sort Code	<input type="text"/>
SWIFT Code	<input type="text"/>

Assign Customers

Who do you want to see this?

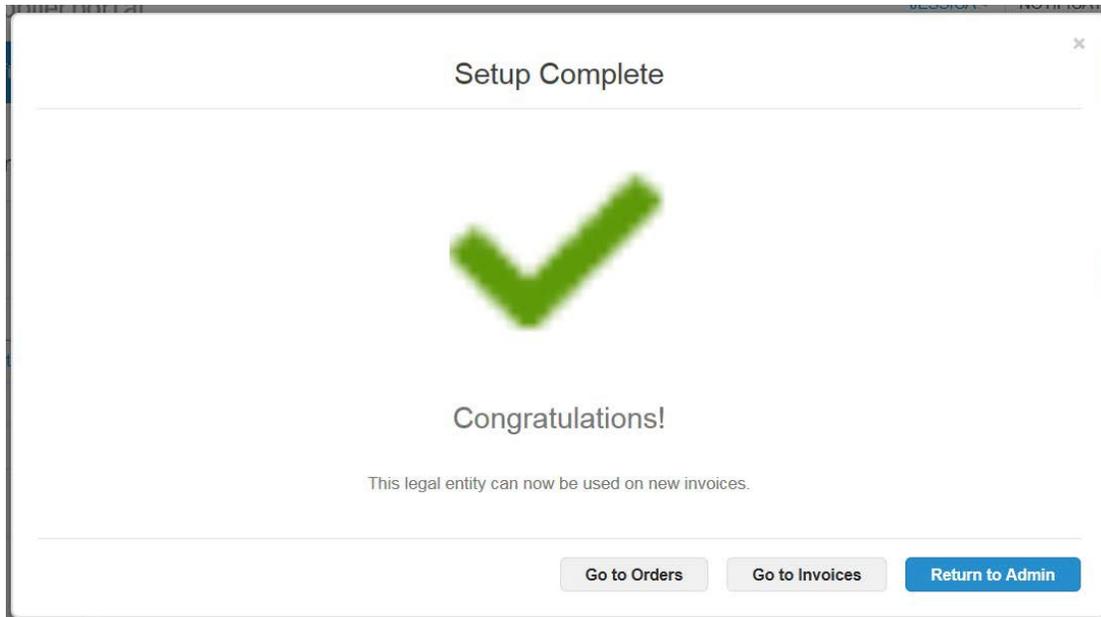
All

Teer Group

Test Instance

*You must assign your **E-Invoicing** information to **Clark Group** in the **Assign Customers** section by checking off the box next to **Clark Group**.*

6. Select **Done** and Setup will be complete.



II. How to Add Multiple Users

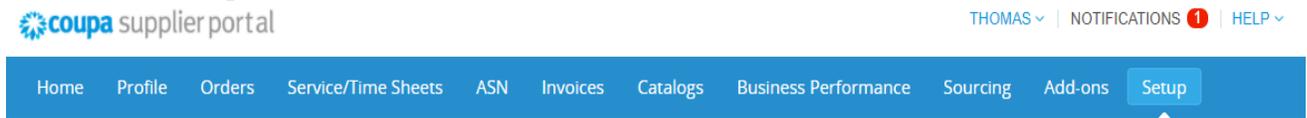
1. Log into the **Coupa Supplier Portal**: <https://supplier.coupa.com/orders>

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

The "Register" section is titled "New to Coupa? Create Your Account." and contains the following fields: "First Name", "Last Name", "Company", and "* Email". A blue "Register" button is located at the bottom of this section.

The "Log In" section is titled "Welcome back!" and contains the following fields: "* Email Address" (with the value "Jessica.Fernandez+CSPDer") and "* Password" (with masked characters). A blue "Log In" button is located below these fields. A link "Forgot Your Password?" is also present.

2. Click on the **Setup** tab



3. From the **Setup** panel make sure the **Users** section is selected and click on **Invite User**

The screenshot shows the "Admin Users" page in the Coupa Supplier Portal. The header includes the Coupa logo and the text "coupa supplier portal". On the right side, there are links for "THOMAS", "NOTIFICATIONS" (with a red notification icon), and "HELP". Below the header, there is a blue navigation bar with the following tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Business Performance", "Sourcing", "Add-ons", and "Setup". The "Setup" tab is highlighted. Below the navigation bar, there is a sub-navigation bar with the following tabs: "Admin" and "Customer Setup". The "Admin" tab is selected.

The main content area is titled "Admin Users" and contains a table of users. The "Users" section is selected, and the "Invite User" button is highlighted. The table has three columns: "Users", "Permissions", and "Customer Access".

Users	Permissions	Customer Access
<p>Greg Williams Tomanderson17@gmail.com Status: Deactivated</p> <p>Activate User</p>	<p>ASNs Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets</p>	<p>None selected</p>
<p>Thomas Anderson thomas.anderson+test@clarkconstruction.com Status: Active</p> <p>Edit</p>	<p>ASNs Admin Business Performance Catalogs Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing</p>	<p>Clark Group TEST</p>

4. An **Invite User** box prompting you to fill in information will pop up, fill in the required fields and checkoff the proper permissions for the user you would like to add

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Invite User

First Name

Last Name

*** Email**

Permissions

- All
- Admin
- Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets

Customers

- All
- Clark Group

CancelSend Invitation

5. Select **Send Invitation** and the user should receive an e-mail inviting them to link to the portal