

Overview of the Coupa Supplier Portal



Background: The Coupa Supplier Portal (CSP) is a tool allowing suppliers to easily do business with Kaiser Permanente. CSP makes managing customers and transactions easy. This Quick Reference Guide (QRG) discusses the following topics:

Topic	Page
How to register to CSP	<u>2</u>
How to log in to CSP	<u>5</u>
Online Help Tour	<u>7</u>
View remit-to address	<u>8</u>

After you have reviewed the above topics, use the below links to train on additional topics available on the Coupa Compass Portal:

Links for Additional Topics
<u>Navigate and Get Help Coupa</u>
<u>Log in to the CSP Coupa</u>
<u>Your Account Coupa</u>
<u>Register for the CSP Coupa</u>
<u>Create or Edit an Invoice Coupa</u>
<u>View and Manage Invoices Coupa</u>
<u>View Invoice Lines Coupa</u>
<u>View and Manage POs Coupa</u>
<u>View PO Lines Coupa</u>
<u>Setting Up Your Remit-To Address Coupa</u>

Primary Audiences:

- Customer Service Accounts Payable (AP) Team
- Suppliers
- Procurement Buyers
- Vendor Support Team

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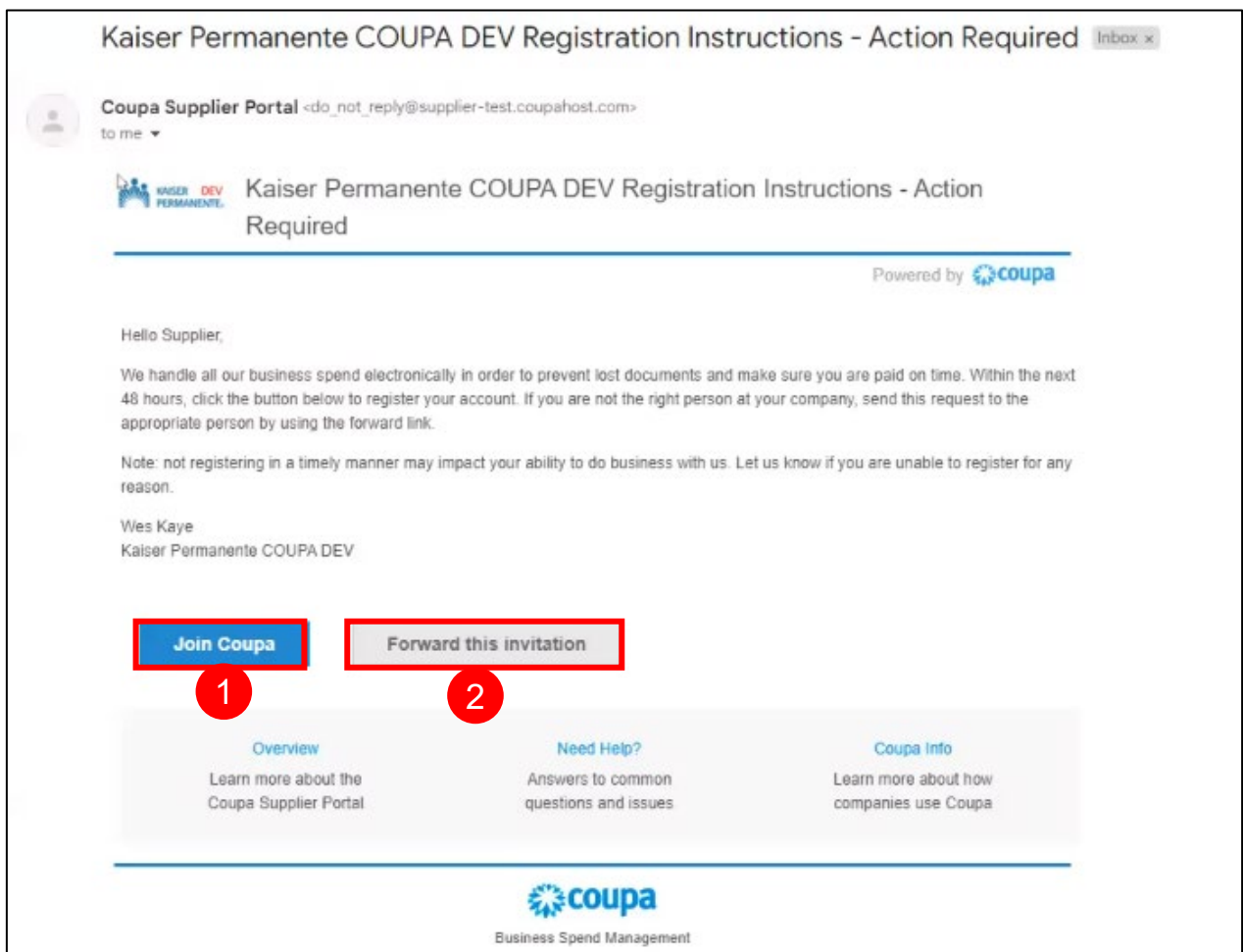


Registering to the CSP

Follow the below steps to register to the CSP:

To register and connect your company to Kaiser Permanente (KP), you will receive an email from KP inviting you to register and join the CSP. This email includes the legal consent that you accept the invitation.

1. Open the email and click the **Join Coupa** button to go to the Coupa Supplier Portal page
2. If you are not the right person to register, click the **Forward this invitation** button to forward the invite to the appropriate person



Note: If you do not receive this email, please check spam folders as well.

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Registering to the CSP

Alternatively, follow the below steps to register to the CSP:

1. Open the website supplier.coupahost.com on your browser and click the **CREATE AN ACCOUNT** button on the login panel

The **Create an Account** page opens. Once you have confirmed your e-mail address in the previous step, you will be asked to provide basic company information:

2. Enter the legal name of your company in the **Business Name** field, this name would appear in the invoice you send to KP
3. Enter your **Email** address
4. Enter the first name and last name of the CSP owner in the **First name** and **Last Name** fields respectively, more users can be added to the same account
5. Enter the login credentials in the **Password** and **Confirm Password** fields
6. As your company joins the Coupa platform, a responsible person needs to accept Coupa's Terms of Use. Click the **Privacy Policy** and **Terms of Use** links to access the details. Tick the checkbox to accept the Privacy Policy and Terms of Use.
7. Click the **Create an Account** button to create your account

The screenshot shows the 'coupa supplier portal' header. Below it is a 'Login' section with fields for 'Email' and 'Password'. A 'Forgot your password?' link is present. At the bottom, there is a blue 'Login' button and a 'New to Coupa? CREATE AN ACCOUNT' link. The 'CREATE AN ACCOUNT' link is highlighted with a red box and a red circle with the number 1.

The screenshot shows the 'Create an Account' page with the sub-header 'Grow your Business on Coupa with a Free Account'. The form fields are numbered 2 through 7:

- 2. Business Name (with subtext: 'Your legal business name (or legal personal name if an individual)')
- 3. Email
- 4. First Name and Last Name
- 5. Password and Confirm Password
- 6. A checkbox for 'I accept the Privacy Policy and the Terms of Use'
- 7. A blue 'Create an Account' button

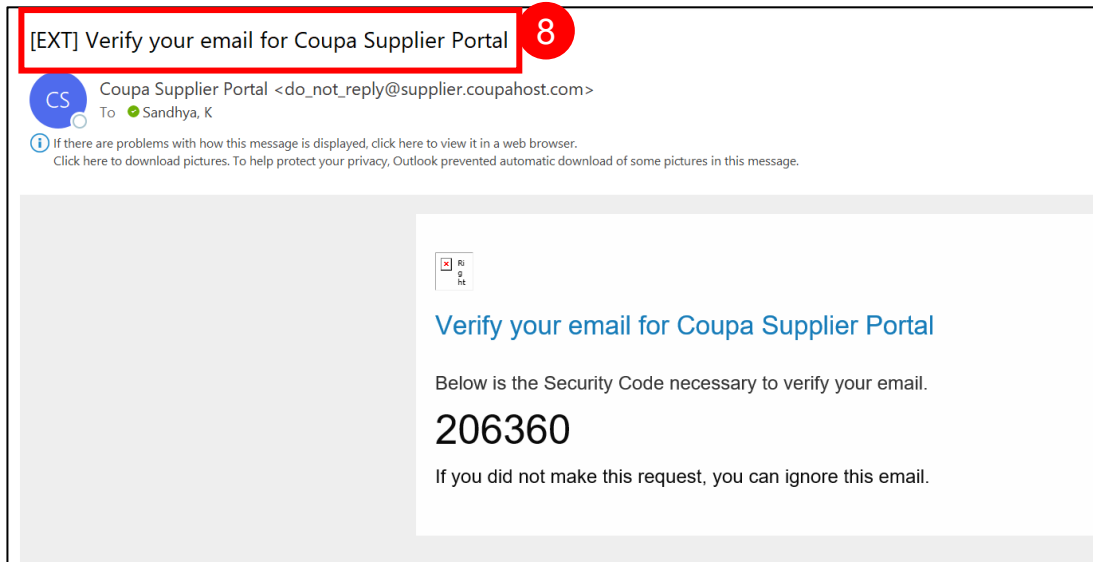
Below the button is the text: 'Already have an account? LOG IN'.

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Registering to the CSP

- You will receive an email invitation with the subject line **Verify your email for Coupa Supplier Portal**, depending on whether the invitation was sent by KP or initiated by the supplier. The email contains a security code to verify your email address for the Coupa Supplier Portal.



Once the email address is verified, the system will redirect you to the Portal's Login page.



Note: You need to setup your profile to represent your legal entity - the exact REMIT TO NAME and TAX ID/ADDRESS.

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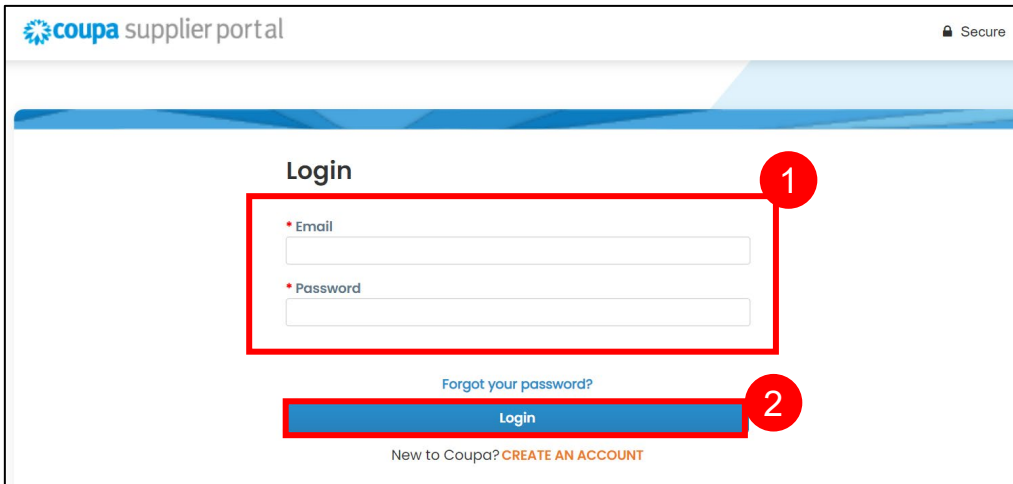
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Login to CSP

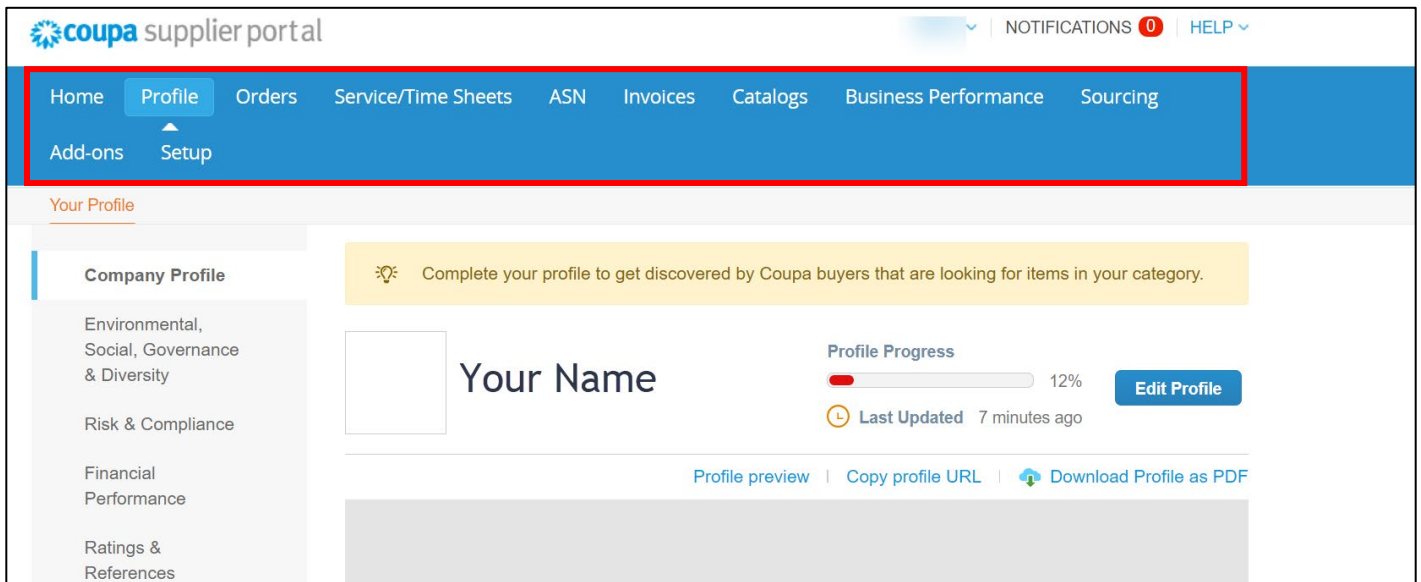
Follow the below steps to login to the CSP:

1. Go to supplier.coupahost.com, in the **Login** pane on the right, enter the login details in the **Email** and the **Password** fields
2. Click the **Login** button

You will be required to enter mandatory details about yourself.



Once logged in, you are directed to the **Profile** tab.



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3. Select the **Home** tab to go to the CSP Homepage
4. The **User Profile** dropdown allows you to view your **Account Settings** and enable **Notification Preferences**
5. The number next to **Notifications** indicates how many new notifications you have received. Click **Notifications** to view all notifications
6. View recently accessed items under the **Recent Activity** section
7. Announcements will appear under the **Announcements** section
8. Use the message board to chat with **Coupa Support** if assistance is needed

The screenshot displays the Coupa Supplier Portal interface. At the top left, the 'coupa supplier portal' logo is visible. A navigation bar contains several tabs: 'Home' (highlighted with a red box and callout 3), 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', and 'Catalogs'. Below these are 'Add-ons' and 'Setup'. On the right side of the navigation bar, there is a 'User Profile' dropdown menu (callout 4) with options for 'Account Settings', 'Notification Preferences', and 'Log Out'. Next to it is a 'NOTIFICATIONS' button with a '0' indicator (callout 5). Below the navigation bar, the user's profile information is shown, including a profile picture, name, and 'Profile Progress 12%' with a 'View Profile' link. Below the profile, there are two main sections: 'Recent Activity' (callout 6) and 'Announcements' (callout 7). The 'Recent Activity' section shows 'No recent activity' and provides instructions. The 'Announcements' section shows 'No Announcements'. At the bottom of the page, there are four cards: 'Two Factor Security' (1 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (2 Duplicates), and 'Linked Customers' (0 Connections). In the bottom right corner, there is a 'Chat with Coupa Support' button (callout 8).

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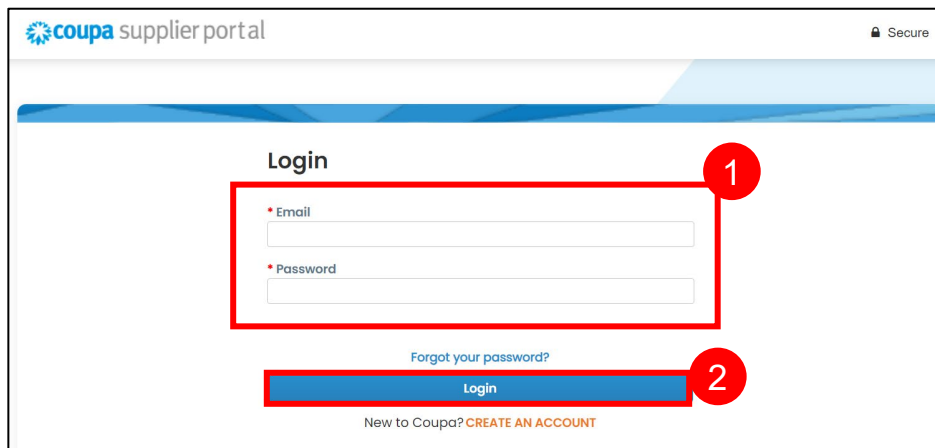


Online Help Tour

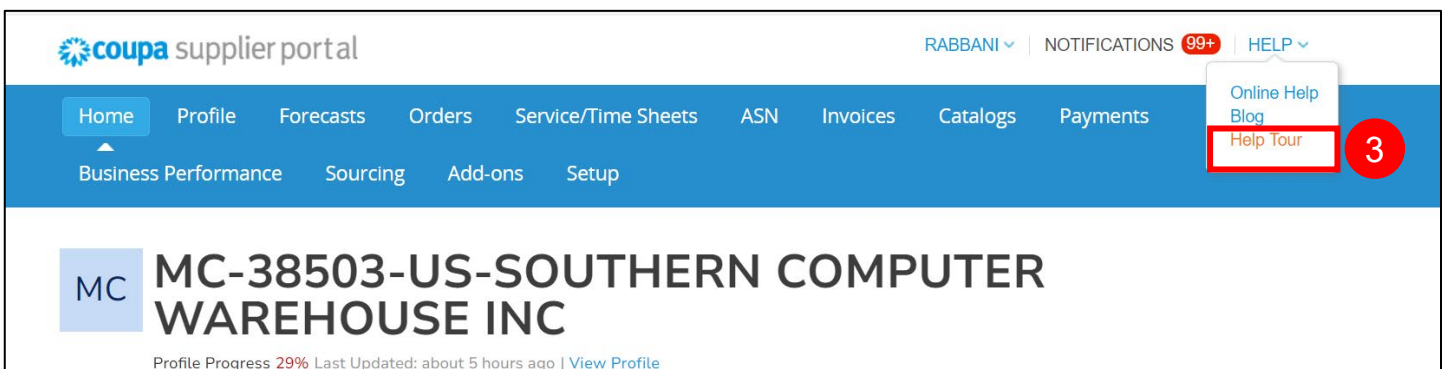
It is recommended to take the help tour to get yourself familiarized with the portal features before starting to use them. Follow the below steps to access online help tour:

1. Go to supplier.coupahost.com, enter the login details in the **Email** and the **Password** fields on the **Login** pane
2. Click the **Login** button

You will be required to enter mandatory details about yourself.



3. Once you are logged in, select the **Help Tour** option from the **HELP** dropdown



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View Remit To Address

Remit-to locations let your customers know where to send payment for their invoices. You can create a single remit-to address for each customer or assign the same one to multiple customers.

Follow these steps to view the remit to address:

1. On the Coupa Homepage, select the **Setup** tab
2. Select the **Remit-To** option from the left pane to let the customers know where to send their invoices

If you try to raise an invoice through the CSP or a Supplier Actionable Notifications (SAN), and you have not created any remit-to addresses, you are prompted to add a remit-to address before continuing.

Users	Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
Merge Requests	None	Test 1 Test city AA 12345 United States Preferred Language: English (US)	Address	FOLLETT CORP- UAT t	✓ Tupperware Brands Corporation - HAL ✓ The Kroger Co. - AZ Locators, LLC 3091849 ✓ Kaiser Permanente COUPA DEV - Rest Supplier ✓ kp-qa - amazon.com ✓ kp-qa - HP INC See all 6 customers	
Requests to Join						
Legal Entity Setup						
Coupa Verified						
Fiscal Representatives						
Remit-To						
Additional CaaS Information	None	test 123 CA CA 123456 United States	Address	HP INC	✓ kp-qa - HP INC	
Early Pay Discounts						
sFTP Accounts						
cXML Errors						
sFTP File Errors (to Customers)	Testing2 ****3456	Test 3 Test3 543212 United States	Bank Account	HP INC	✓ Tupperware Brands Corporation - HAL ✓ The Kroger Co. - AZ Locators, LLC 3091849	

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