COUPA SUPPLIER PORTAL (CSP) GUIDE:
Onboarding Steps

You will receive an email from @supplier.coupahost.com domain. Check your spam if you do not see it. Click on Join and Respond.

You will begin filling out the required fields indicated by a red asterisk. Please verify your business name, your Accounting contact, the role within the business you hold, and create a password to use going forward. If this should be filled out by a different person within your business, you would click on "Forward this to someone" at the bottom.

After creating a password, it will take you to continue filling out the Form with the requested information. Please make sure to include the following:

- **Legal Name**-Only enter the legal name if the company identifies itself to have a DBA and is different than legal name on the W-9.
- **Address**-This would be the main address for the company.
- **PO Email**-Please enter the email that approved Purchase Orders should be emailed to.
  - o Note that this can be the same email as the main login.
- **Remittance Contact Email**-This email is where all payment remittances will be sent once invoices are paid. Note that this can be the same email as the main login.
- **Website**-Please enter the main company website, if any.

- **Federal Tax ID**-Tax ID for company. Incorporated companies are not required to attach W-9. Sole Proprietors, LLCs, and Partnerships are required to attach filled out W-9. Any W-9 not filled out in its entirety and signed will be rejected and sent back to you.
- **Certificate of Insurance**-Please provide your insurance certificate if required by Neighborhood per prior communication. Please reach out to purchasing@nhcare.org with questions or concerns about whether this is a requirement or not.

You will then be requested to add your remit to (payment preference). Click on "Add Remit-To". *Please note, before proceeding, it might request you to set up your two-factor authentication first. You can download the Microsoft Authenticator App on your phone or the Google Authenticator and follow the steps on the screen.

Enter the Remit to Address associated with where your company payments are being received and click on "Save and Continue".

After entering your address, it will take you to the next screen where you will choose one of the following:

Virtual Card- Accept American Express without any fees? Great! This is our preferred fastest method to get payment on invoices with possible shorter payment terms. You will be issued an American Express one-time virtual card to run through your processor for the invoices included in the remittance. This will be sent securely to the email you indicate.

Bank Account- This is our second preferred method. Payments will be deposited to your bank account directly. You will receive email when payment is processed as well as electronic remittance. Please follow the "Bank Remit To" steps below.

Address- This is an alternative method when the Bank or Virtual Card are not an option for your company. Selecting this method means you will enter your normal mailing address and a Digital Check will be sent to you to download from the portal directly. You will then print, endorse, and deposit like you would any other check.

Bank Remit To: Enter your ACH payment information and attach a copy of a voided check/document from your bank that verifies your bank routing number and account number. This is needed for security and verification purposes. Bank information will only be visible to the designated Neighborhood team member verifying the information and will not be shared with anyone else. It is also stored and secured within the portal with Coupa's security Two Factor Authentication feature.

*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

*Voided Check/Bank Account and Routing Verification

*Attachments Add File

Please attach bank letter or voided check to verify routing and account number

Certificate of Insurance Choose File No file chosen

Please include workers compensation insurance if applicable

Click and Save these guides to reference while navigating the portal
- CSP_Guide_-_Login_and_Home_Page_...
- CSP_Guide_-_Invoice_Creation_-_PO_...
- CSP_Guide_-_Look_Up_Payments___R...

Next step will be to enter the bank details. Supporting document can be attached here but is not required in this step. It will be required to attach in its own section when you get back to the main form. ***Make sure to check the box** "My Bank does not have a BIC code" since this will be an ACH payment, not wire. Once entered, click on "Save and Continue".

*Payment Type Bank Account ⌄

What are your Bank Account Details? ⓘ

Bank Account Country/Region:	United States ⌄
Bank Account Currency:	USD ⌄
Beneficiary Name:	_CoupaCSP Test
Bank Name:	
Account Number:	ⓘ
Confirm Account Number:	
ACH Routing Number:	ⓘ
Wire Routing Number:	ⓘ
SWIFT/BIC Code:	ⓘ
	☐ My bank does not have a BIC code
Branch Code:	
Bank Account Type:	Business ⌄
Supporting Documents:	Choose Files No file chosen ⓘ

You will then need to attest to the statement by clicking on the checkbox for your payment option and attach the supporting document mentioned above.

By clicking the checkbox below, I hereby attest that the banking information entered above is correct to the best of my knowledge and matches the attached voided check/documentation from bank. I also authorize Neighborhood Healthcare to originate electronic credit transactions to my bank or credit union account indicated above. If necessary, Neighborhood Healthcare may make deductions from my account for any payments credited to my account in error. This authority is to remain in full effect until Neighborhood Healthcare has received written notification from company/organization authorized representative of its termination prior to payment.

*I have read, understand, and agree to authorize per above statement for ACH/Direct Bank payments ☐

* Voided Check/Bank Account and Routing Verification

* Attachments Add File

There will be an option to attach COI (Certificate of Insurance) if it is applicable. If not applicable, please skip and move to the next section. For further information if this is applicable, please visit our website using this LINK and review New Supplier Resources section.

Make sure to save copies of the provided quick guides. These are essential to download and have for future reference on how to navigate the Home Page of the portal, how to invoice us electronically from a PO or non-PO and check on the payment status of invoices within the portal.

Click and Save these guides to reference while navigating the portal

- CSP_Guide_-_Login_and_Home_Page_...
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- CSP_Guide_-_Look_Up_Payments___R...

Once all required fields and guides are downloaded, you are ready to submit them to Neighborhood for final review and approval. Scroll to bottom and leave the Neighborhood Internal Fields blank. Click on "Submit for Approval". If any information is missing, it will prompt with a red banner on top with the name of the section and action needed.

*If at any time you are logged out and need to log back in during the process, please follow the steps below. It also includes quick navigation of the Home Page overview.

Login Page: After you have completed the initial account creation, you can login by going to **supplier.coupahost.com** and enter your email address and password under the **Log In** pane.
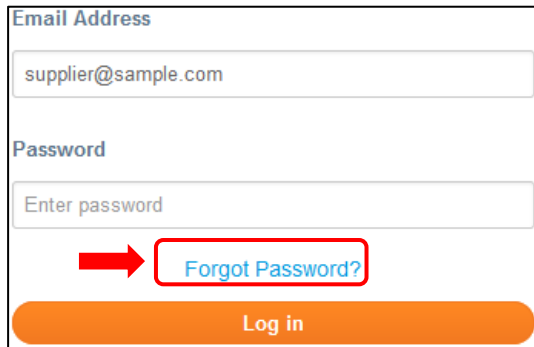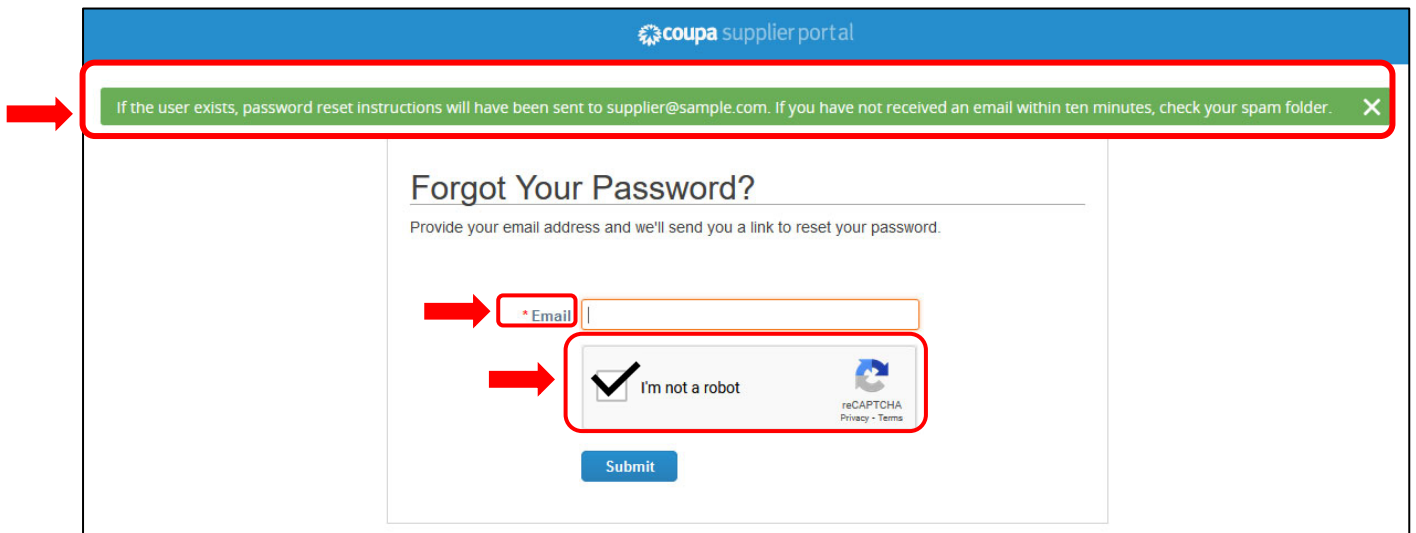
Forgot Password: If you forgot your password, then simply click the Forgot Password button to proceed.

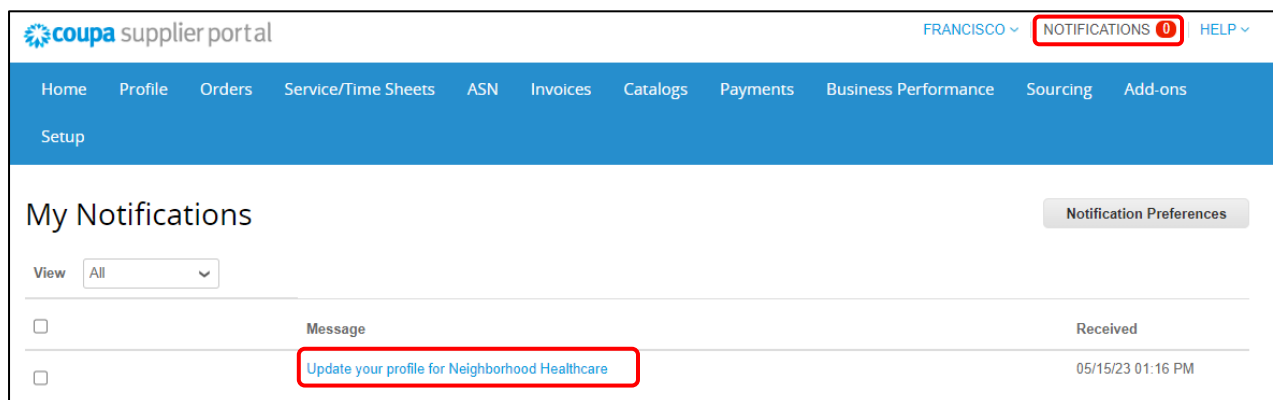You should then be prompted to provide your email address and select the security checkbox. Afterwards you will be sent a link to reset your password and you will get a message as shown below.

Once logged in, you can access the form again by going to your notifications and clicking on the latest message on top. It should read something along the lines of "Update your profile…" or similar message that includes finishing your profile.
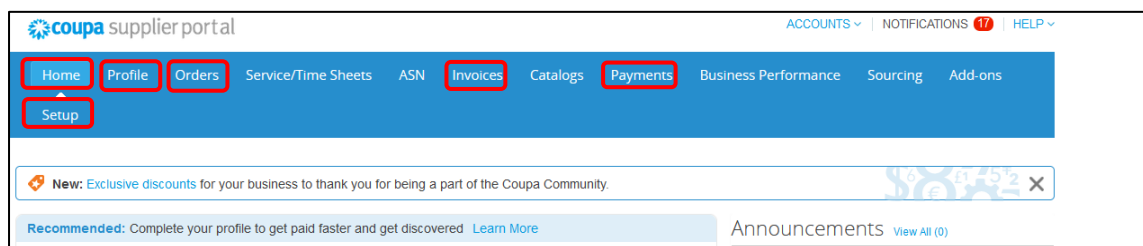
Homepage Overview: Once logged in, you will be directed to your CSP Home Page where you will be able to access different functions by clicking on the relevant tab. Below is a quick description of the tabs that are used the most.

Home – View a summary of your company profile, see the list of customers you are connected to, quickly access your tabs, and any customer announcements.

Profile – Create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.

Orders – View the purchase orders you received from your customers.

Invoices – Create and manage invoices to send to your customers. You can also view previous invoices already sent and their approval status.

Payments – View payments processed for your invoices. You can also download any digital check payments from your customers if you selected this Coupa Pay electronic option.

Setup – Manage users, merge requests, add remit-to addresses, set up electronic invoicing, view, and other preferred settings.

Notifications – View recent notifications related to information requests from customers, invoice status, payments, and other important updates related to your company.