Quick Reference Guide: Supplier Registration and Coupa Supplier Portal (CSP)

Quick Reference Guide

Coupa Supplier Registration and Coupa Supplier Portal (CSP)

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Coupa Supplier Registration and Coupa Supplier Portal (CSP)

Supplier Registration Overview

The United States Postal Service eSourcing application is being replaced with a new product called Coupa. Your company has or will be automatically set up to start the transition into the new system and you will (if you haven't already) be sent a link via email to set up your password for the Coupa Supplier Portal and finish updating your company profile. You will need to complete your profile and the form as soon as possible to ensure that USPS will be able to invite you to appropriate opportunities based off your company information and services.

Before Getting Started

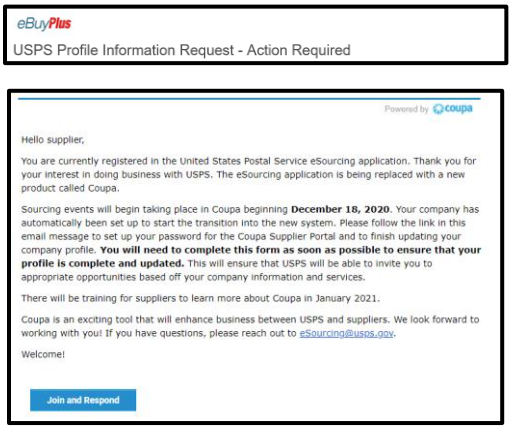
Please select one primary contact who will oversee and maintain your company's profile in the Coupa Supplier Portal. The user you add will be the primary contact for your company when invited to USPS solicitations. Please be sure to keep this information updated and correct to ensure you have an active contact for events.

If your company has multiple contacts with USPS, whether they work in a different office or support a different company function, you can send a request to have additional users be added to the supplier record. Please work with your USPS contact to ensure that the correct company contact is invited to the event. To add additional users, please send USPS a request in writing on Company Letterhead which includes the owner's signature. You may send it as an attachment to eSourcing@usps.gov. The request will need to include the user's name, e-mail address, work phone number and company's DUNS Number. Also, include if this is the new Primary Contact or an additional contact for sourcing events only.

Please note and save the username and password you use to set up your Coupa Supplier Portal profile. These login credentials are separate from the Sourcing Response Portal login credentials you will receive when you are invited to a USPS sourcing event.

Supplier Information Update Form

Step 1: You will receive one of the below emails labeled **USPS Profile Information Request – Action Required** and at the end of the message you'll select the button **Join and Respond** which will take you to Coupa Supplier Portal.



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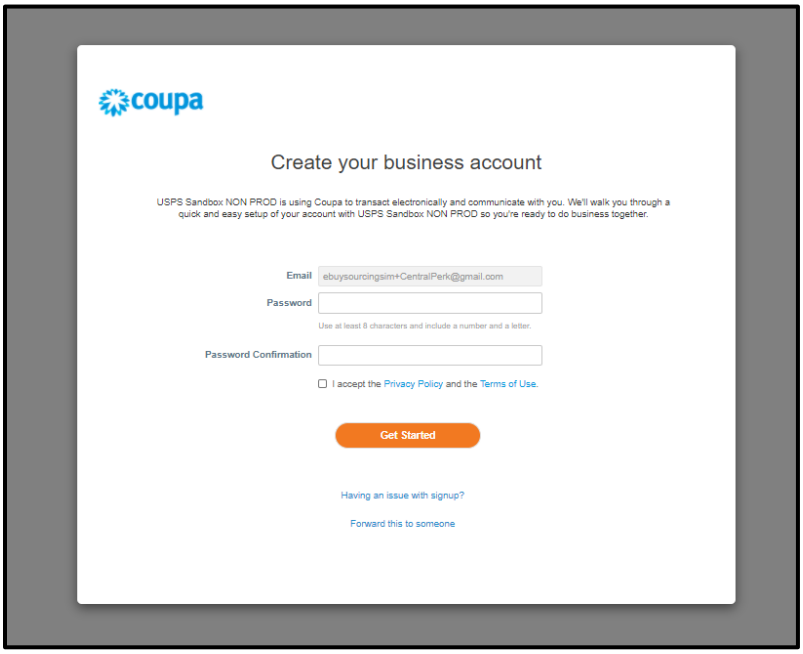
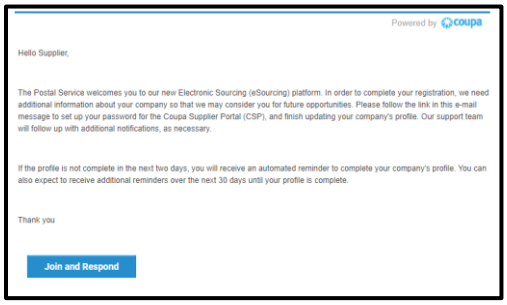
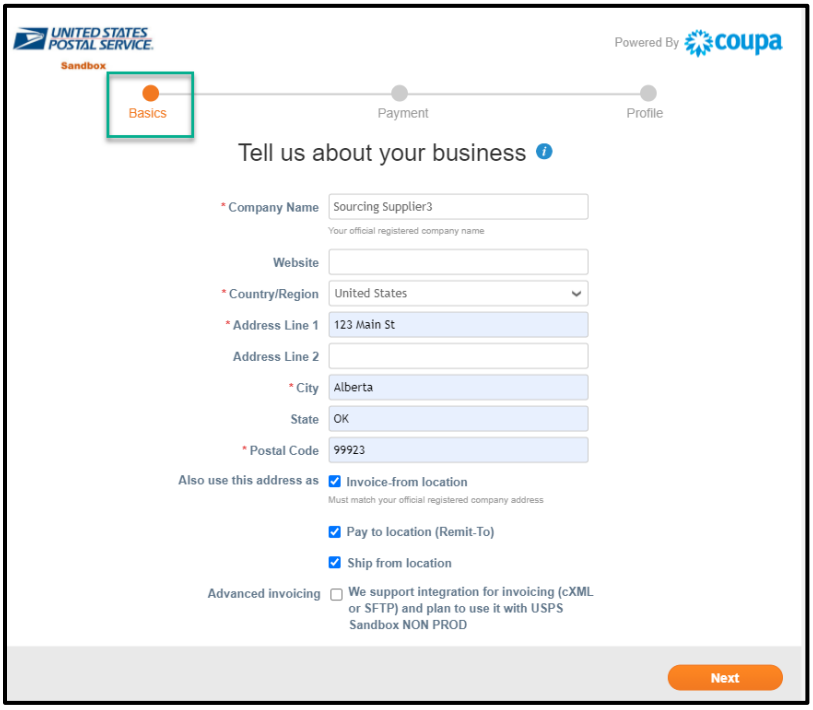




Step 2: You'll be taken to Coupa Supplier Portal (CSP) where you'll be asked to create an account if you don't have one already with another Customer. Please create a password and check the box to accept the Privacy Policy and Terms of Use then select Get Started.



Step 3: If this Coupa Supplier Portal pop-up for Legal Entity information appears please follow the below steps, if not, please continue to **Step 18.**

Note: you are on the Basics section of the pop-up

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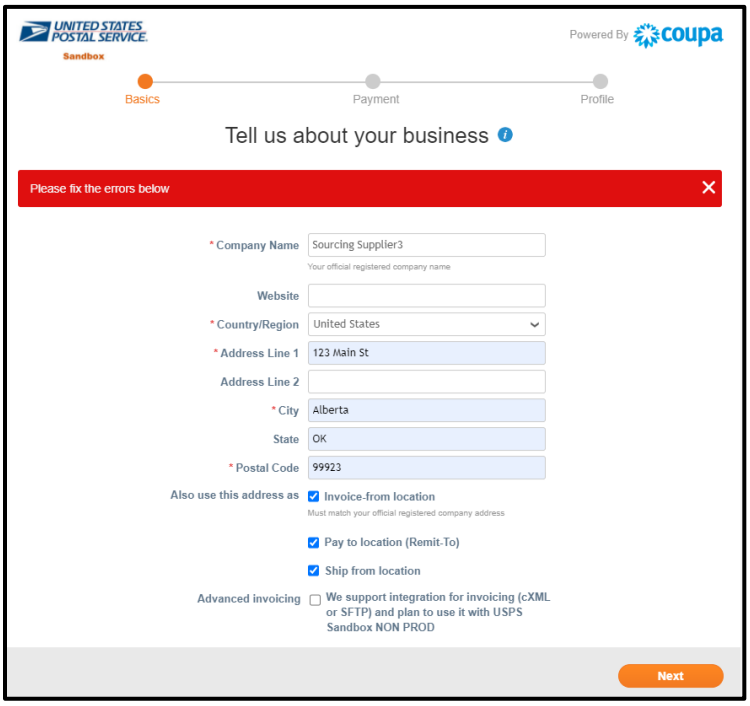
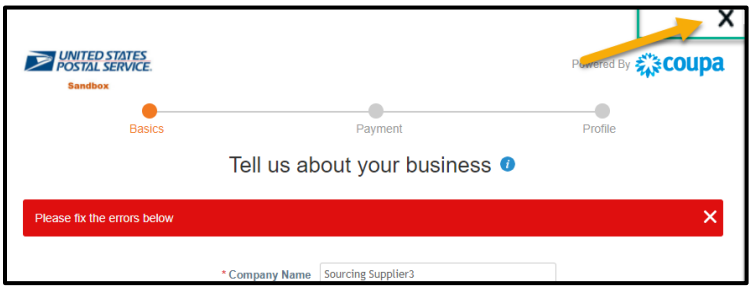
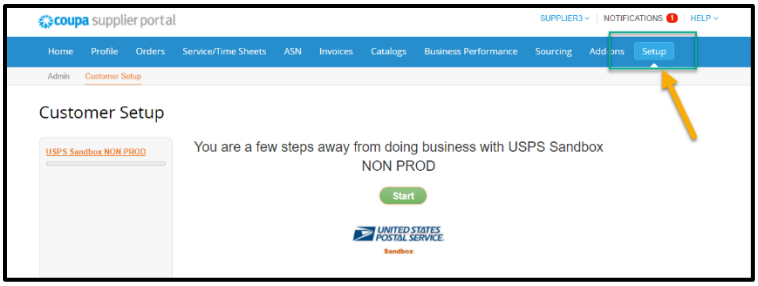


<u>Step 4:</u> Complete all required fields with appropriate information and click **Next.**

If you receive **Please fix the errors below** error at the top of the pop-up, please continue with the below steps but if you do not receive this error continue to **Step 16**.



<u>Step 5:</u> Click the **X** at the top of the pop-up to close it.



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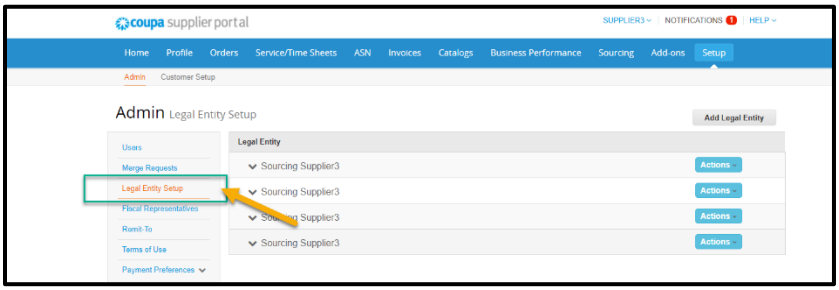
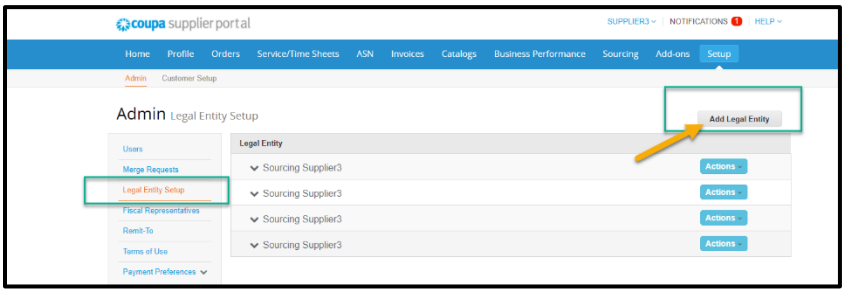
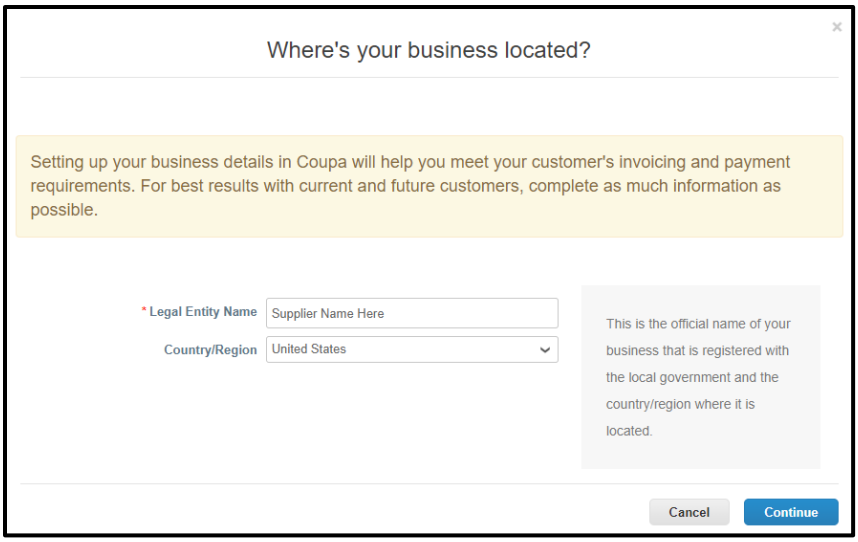


Step 6: Navigate to **Setup**

Step 7: Click **Legal Entity Setup**



Note: Per Coupa Support – the error in the pop-up will occur when there are multiple Legal Entities with the same information – duplicates should be removed by deactivating (under Actions)



Step 8: Click **Add Legal Entity**

Step 9: Complete the information in the setup and click **Continue.**

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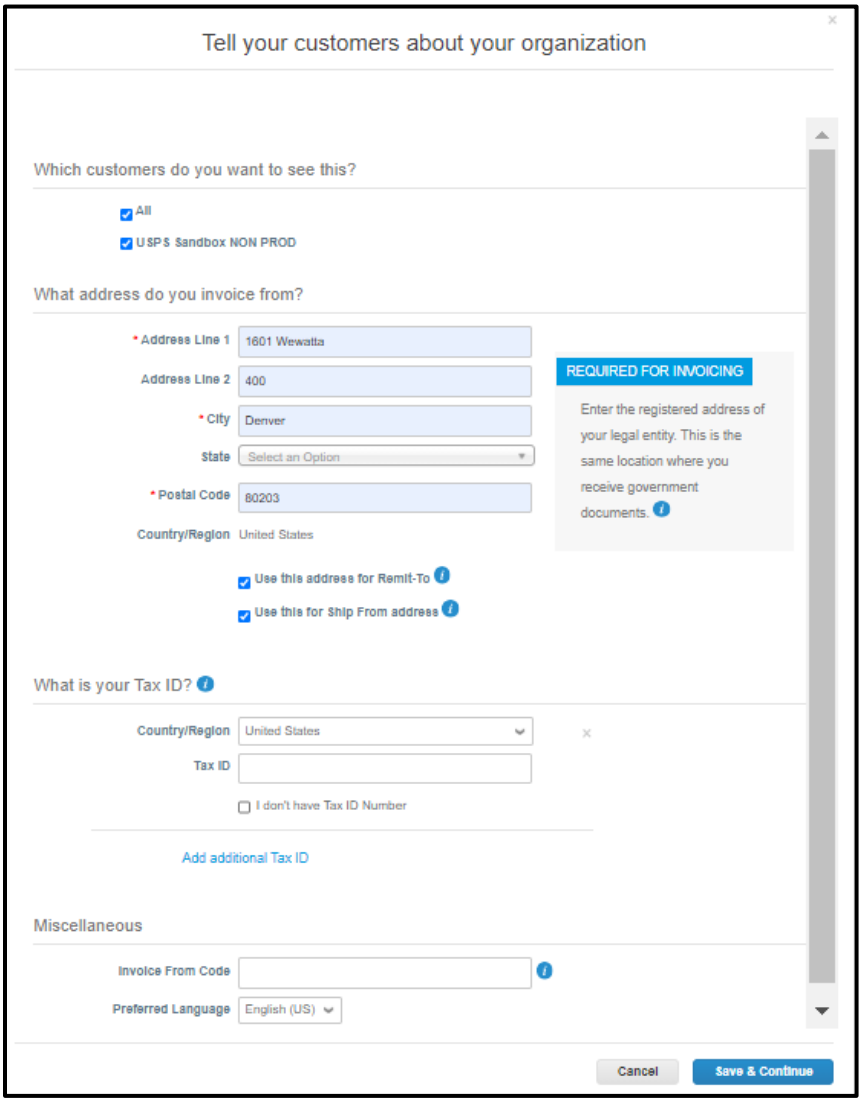
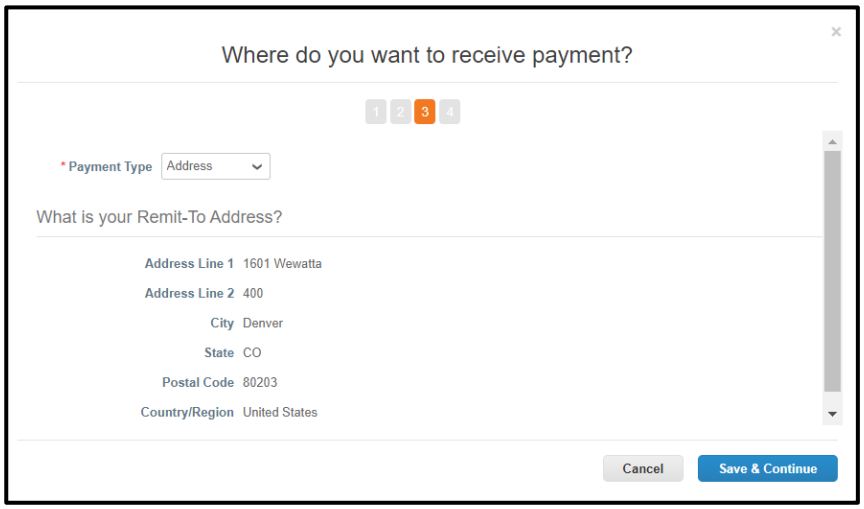
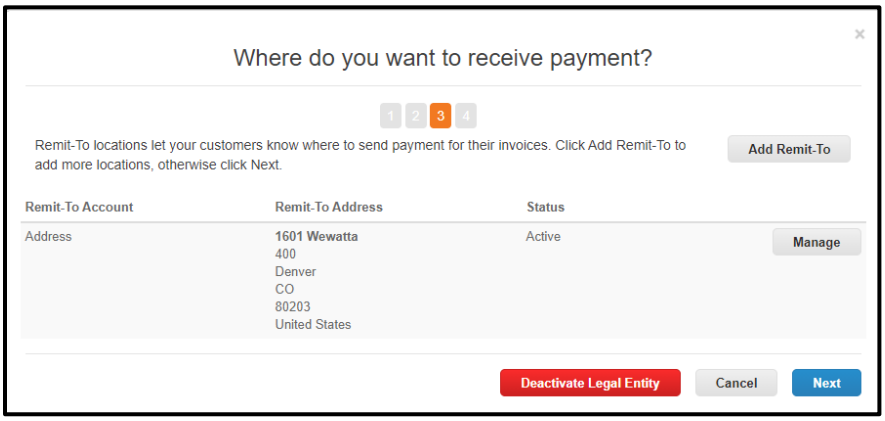


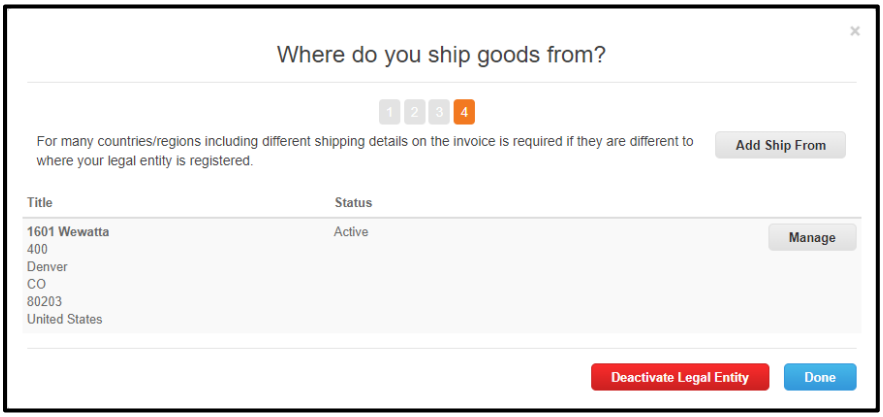
<u>Step 10:</u> Fill in Address and hit **Save & Continue.**



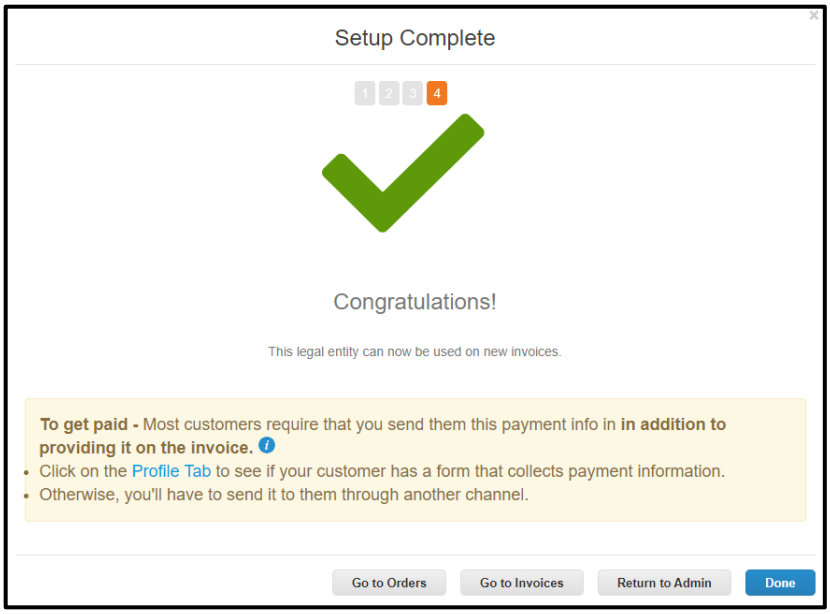
Step 11: No payment related information is needed or recorded for USPS, so hit **Save & Continue.**



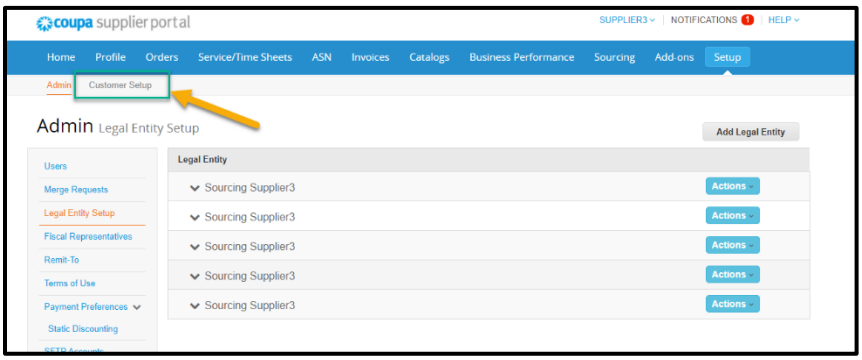
Step 12: No payment related information is needed or recorded for USPS, so click **Next**.



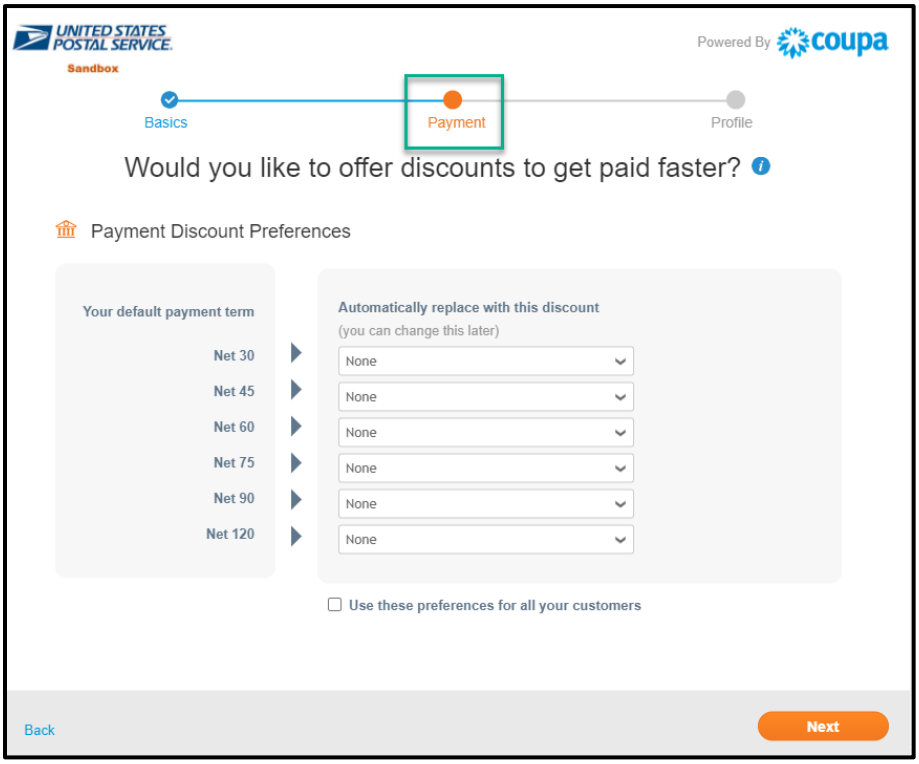
Step 13: No shipping information is needed or recorded for USPS, so click **Done**.



Step 14: Confirm Setup is Complete and click **Done**.



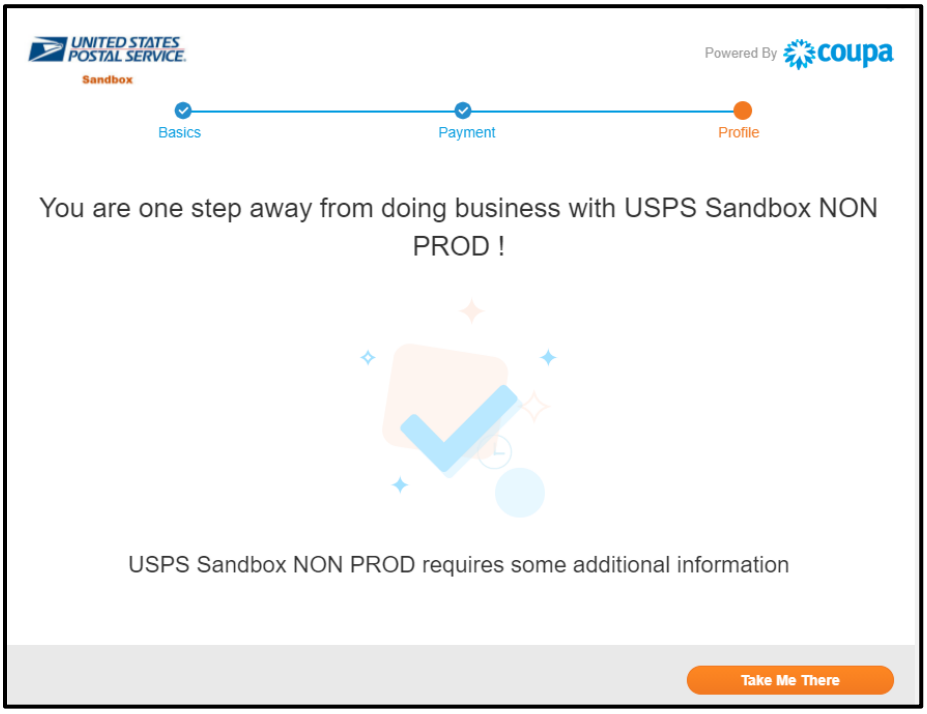
Step 15: Navigate to **Customer Setup**



Step 16: The original pop-up will appear showing the Payment section.

Note: The Basics section is now completed.

No Coupa Supplier Portal payment term information is needed or recorded for USPS, so click **Next.**



Step 17: Setup is complete, and you can now click **Take Me There**.

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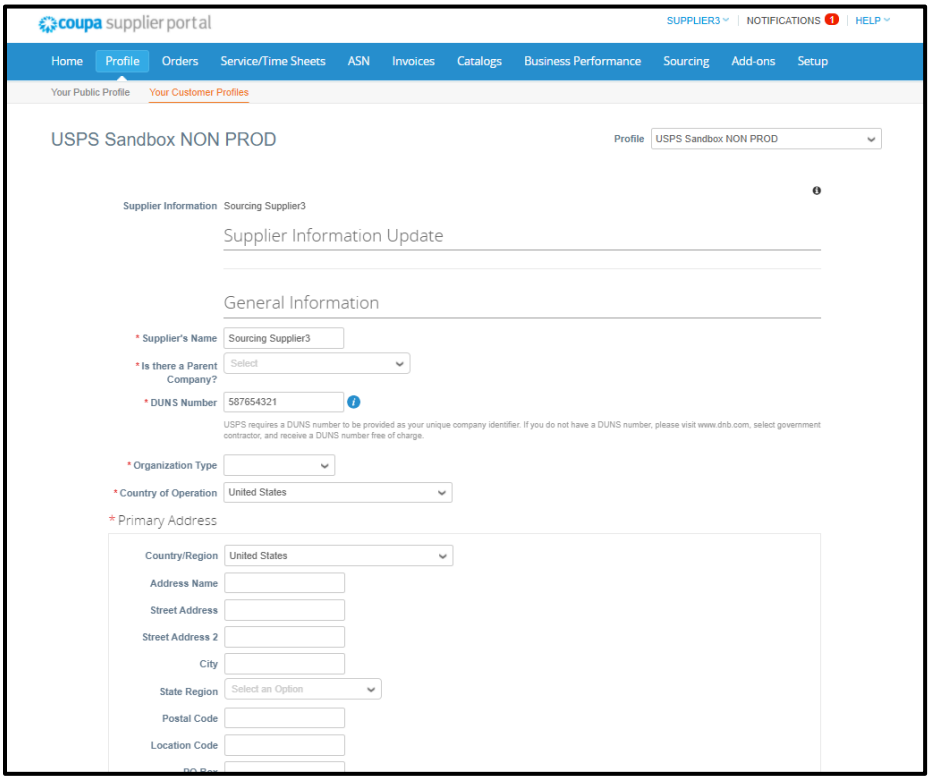

<u>Step 18:</u> Complete the USPS Supplier Information Update Form.

You can locate this Form at any time by going to **Profile → Your Customer Profiles**

Please read the next section, Supplier Information Update Fields & Filling Them Out, on Page 12 for descriptions of the fields and tips on filling out the form.

Click **Decline** to decline completing the Form.

Click **Save** to save your progress.

Click **Submit for Approval** when the Form is complete, and you are ready to submit to USPS.

Coupa Supplier Registration and Coupa Supplier Portal (CSP)

Supplier Information Update Fields & Filling Them Out

Below are the fields, descriptions, and the input examples in the Supplier Information Update Form of your Customer's Profile section in Coupa Supplier Portal that you'll need to complete.

Supplier Information Update Field	Description	Input Examples
Supplier's Name	Supplier's Legal Company Name	Company Name, LLC
Is there a Parent Company?	Does the Supplier have a Parent Company?	Select from Drop Down
Parent Company Name	Parent Supplier Company Name	Parent Company Name, LLC
DUNS Number	Supplier's Data Universal Numbering System Number; please go to https://www.dnb.com/duns-number.html for more information on what a DUNS Number is and how to create one or search for yours	123456789 (9 digit number)
Organization Type	Describes the organization type of the Supplier	Select from Drop Down
Country of Operation	The Country where the Supplier is based	Select from Drop Down
Primary Address	Primary Address of Supplier	--
Company Size	Number of Employees at Company	20,000
Default Commodity	The Supplier's default commodity; please select the most appropriate default commodity for your company. Please read the options carefully and select the commodity that best encompasses your company's services.	Select from Drop Down
Goods and Services Provided	A brief description of what the Supplier provides	Paper Products
Primary NAICS Code	North American Industry Classification System code that enables buyers and sellers to describe goods and services; please use this site www.naics.com to help you determine the most appropriate code for your company.	5 – 6 digit code (12345)
Second NAICS Code	Secondary North American Industry Classification System code that enables buyers and sellers to describe goods and services; please use this site www.naics.com to help you determine the most appropriate code for your company.	5 – 6 digit code (67890)
Third NAICS Code	Third North American Industry Classification System code that enables buyers and sellers to describe goods and services; please use this site www.naics.com to help you determine the most appropriate code for your company.	5 – 6 digit code (101112)
Fourth NAICS Code	Fourth North American Industry Classification System code that enables buyers and sellers to describe goods and services; please use this site www.naics.com to help you determine the most appropriate code for your company.	5 – 6 digit code (131415)

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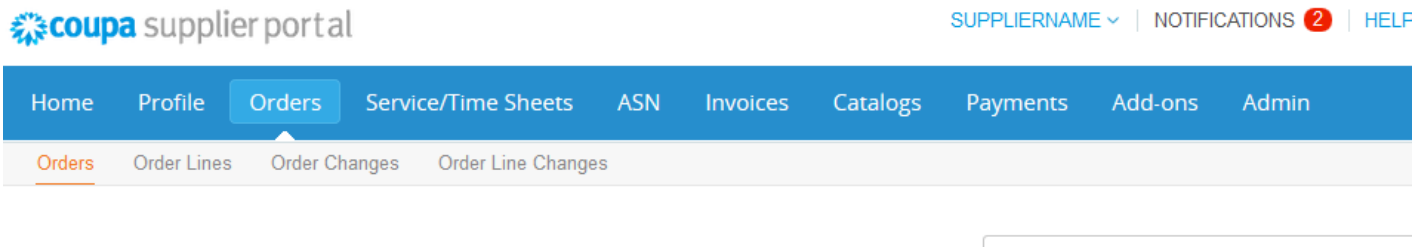
Supplier Information Update Field	Description	Input Examples
UNSPSC	The United Nations Standard Products and Services Code that enables buyers and sellers to describe goods and services; please use this site https://www.ungm.org/Public/UNSPSC to help you determine the most appropriate code for your company. Please note not all UNSPSC Codes are available in the USPS drop down, you will need to select the code that best encompasses your company's services.	Multi-Select, we recommend choosing up to 5 codes that best fit your company
UNSPSC Codes Selected	Internal Use Only – Do not fill this out	--
Minority Indicator	Indicates if the Supplier is a Minority Supplier	Check Yes, Leave Blank
Minority Type	The three-letter code for the Minority Type	Drop Down
Please select your Supplier Type	Select if Supplier is a Transportation or Other Supplier	Transportation, Other
Are you a Surface Transportation Supplier?	**Will only apply to Transportation Supplier**	Yes, No
Service Types of Surface Transportation	**Will only apply to Transportation Suppliers**	Multi-Select
Service Types Selected	Internal Use Only – Do not fill this out	--
Surface Transportation Vehicle Types	**Will only apply to Transportation Suppliers**	Multi-Select
Vehicle Types Selected	Internal Use Only – Do not fill this out	--
Services offered Nationwide or by State?	**Will only apply to Transportation Suppliers**	Nationwide, State
Surface Transportation States Serviced	**Will only apply to Transportation Suppliers**	AL, FL, CO, WV (please be sure to put the state abbreviation as shown in the examples, or the form will not be accepted)
Surface Transportation Areas Serviced	**Will only apply to Transportation Suppliers**	Drop Down
Contact Information	Section for the Supplier Primary Contact	--
Are any of the Certification statements below true?"	Supplier will read the Certification Statements and confirm if the statements are true or not	Drop Down Yes, No
Certification Statement	Certification Statement regarding Debarment, Proposed Debarment, and Other Matters	--
How did you find out about the Postal Service?		
Comment	A field for comments to be entered. Please use this space if you had to update your Supplier Company Name or Primary Contact user. This will help USPS document these changes.	There was a typo in my company's name. Please update Jovn's Trucks to be the correct name of John's Trucks.
Comment Source	A field indicating who made the comment	Jane Doe

Coupa Supplier Portal Main Menu

Below is an overview of the Coupa Supplier Portal Menu and what each section is:



Menu Item	Description
Home	View and improve your public company profile, see the list of customers you are connected to, edit your custom-specific company profile, and merge accounts.
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.
Service/Time Sheets	View the list of service/time sheets and related purchase order lines.
ASN	Send advance ship notice, that is, notifications about when you ship items to your customers.
Invoices	Create and manage invoices to send to your customers.
Catalogs	Create and manage customer-specific catalogs.
Payments	Accept payment through digital checks from your customers if they use Coupa Pay.
Add-ons	Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.
Admin	Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use, and set preferred accelerated payment terms.

Coupa Supplier Registration and Coupa Supplier Portal (CSP)

FAQ's

1. **Why is Coupa Supplier Portal (CSP) asking about my banking and invoicing information?**
   This is not necessary and is not pertinent information to USPS, so you don't need to fill this out.

2. **Why am I being asked to re-register with USPS?**
   Yes, you are most likely registered in the United States Postal Service eSourcing application. However, the eSourcing application is being replaced with a new product called Coupa. In order to be invited to the appropriate opportunities you'll need to register within the Coupa Supplier Portal and complete the Supplier Information Update Form that USPS has sent to you.

3. **I do not know what a UNSPSC Code or NAICS Code is, how do I pick one for my company?**
   NAICS Code is The United Nations Standard Products and Services Code that enables buyers and sellers to describe goods and services. Please go to www.naics.com to research what NAICS Code best fits your company's services.

   The United Nations Standard Products and Services Code that enables buyers and sellers to describe goods and services; please use this site https://www.ungm.org/Public/UNSPSC to help you determine the most appropriate code for your company. Please note not all UNSPSC Codes are available in the USPS drop down, you will need to select the code that encompasses your company's services.

   We understand it can be difficult to determine the correct field, but you will need to research and find the best fit for your company. All the fields within the registration form are used by USPS to help find applicable suppliers for future solicitations.

4. **I can log into the Coupa Supplier Portal where I completed my registration form, but I cannot log in to the event I was invited to – why?**
   The username and password you use to set up your Coupa Supplier Portal profile is separate from your username and password you will set up to access a solicitation. You will receive your login credentials to the Sourcing Response Portal once you are invited to an event. Please keep usernames and passwords written down to have for reference when logging in to either system.

5. **Who do I reach out to if I have questions?**
   For any questions regarding the Supplier Information Update Form and its fields you can reach out to eSourcing@usps.gov. When you reach out to the Help Desk, please include a screenshot of any issues you are experiencing as well as your company name and DUNS Number to better help the team troubleshoot. For issues you're experiencing regarding Coupa Supplier Portal and logging in you can reach out to Coupa directly at Supplier@coupa.com

6. **How do I register if the admin/owner of the CSP account left the Company?**
   If you are needing to change any of your company information, please send USPS a request in writing on Company Letterhead which includes the owner's signature and the company's DUNS Number. You may send it as an attachment to eSourcing@usps.gov.

7. **What do I do if I receive the "We're sorry, but something went wrong" error?**
   Contact your customer and ask them to open a support ticket because something is wrong on their end with a configuration or an update that they need to resolve with Coupa support.

Additional Coupa Resources

Coupa Supplier Portal
https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

Getting Started with Coupa Supplier Portal:
https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP

Working with Coupa Supplier Portal:
https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Work_with_the_CSP

Coupa Supplier Portal Community FAQ and Troubleshooting:
https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_FAQ_and_Troubleshooting