



# Job Aid – Supplier: How to Navigate the CSP – Coupa Tool

## How to Navigate the Coupa Supplier Portal (CSP)

In this job aid:

### ✓ How to Navigate the Coupa Supplier Portal (CSP)

This job aid demonstrates how suppliers can navigate within the Coupa Supplier Portal (CSP). The Coupa Supplier Portal is a free tool for suppliers to manage company information, review purchase orders, create invoices, and view payment status.

## Coupa Supplier Portal (CSP) Overview

- Suppliers will receive an email invitation from DaVita to signup for the CSP.
- DaVita policy requires Purchase Orders for ALL services and goods prior to provisioning, or suppliers will risk delayed payments.
- If you have questions regarding the CSP, please refer to our Procurement webpage, <u>https://www.davita.com/about/suppliers</u>.
- If you are unable to find your CSP invitation from DaVita, please reach out to <u>PRISMSupportServices@DaVita.com</u>.

# Process - Login

1. Login to the Coupa Supplier Portal (<u>https://supplier.coupahost.com</u>). On the homepage, ensure you are connected to DaVita under "Latest Customers".

<b>coupa</b> supplier portal			COUPA ~   NOTIF	FICATIONS 10   HELP ~
Home Profile Orders	Service/Time Sheets ASN Invo	ices Catalogs Business Perfo	rmance Sourcing Add-ons	s Setup
New: Exclusive discounts for your	business to thank you for being a part of th	ne Coupa Community.	5	X
Recommended: Complete your profile	to get paid faster and get discovered Lea	am More	Announcements view	w All (0)
Profile Progress	Last Updated	Improve Your Profile	One-Click Savings v	iew All
Profile Summary			Start saving today! Explore deals for your compan Coupa Community.	y, exclusive to the
	<b>1</b>	32	Merge Accounts	
1 Legal Entity View	1 Registered User	1 Connected Customer	If your company has multiple C them to reduce confusion for yo more	SP accounts, merge our customers. Learn
	VIEW			Request Merge
S Banking Info Diversity	Accelerate Sribery Policy		Latest Customers	
E AND R JANITORIAL SER	VICES		DaVita Inc - TEST ENV	

- 2. Once you are connected with DaVita, you can:
  - a) Manage company information
  - b) Review purchase orders
  - c) Create invoices

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d) View payment status





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## **Process – Manage Company Information**

1. Navigate to the Setup tab to manage your account. Before transacting with DaVita, you must add remit-to information here under Payment Methods. You may also add users, additional legal entities, and more.

€ COU	<b>pa</b> suppli	ier port a	l		Admin Users
	Invoices	Orders	Business Profile	Setup	Users Merge Requests Merge Suggestions Requests to Join Fiscal Representatives

- 2. If you are a new supplier at DaVita, navigate to Business Profile -> Information Requests (as seen below) and complete the onboarding form. Once complete, ensure you submit your onboarding form to DaVita for review.
- 3. If you are an existing supplier at DaVita, navigate to Business Profile -> Information Requests (as seen below) to review and validate your existing information on file at DaVita. If updates are required, complete the onboarding form and ensure you submit your onboarding form to Davita for review.

**Note**: If you are unable to find the request to update your company information from DaVita, please reach out to <u>DaVitaCoupaSuppliers@DaVita.com</u>.



# <u> Process – Review Purchase Orders</u>

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- 1. Navigate to the Orders tab to review all Purchase Orders that DaVita has sent you.
- 2. Make sure that "DaVita Inc" is the Selected Customer.
- 3. Click the PO Number to open and review all PO details.



#### For questions contact <a href="mailto:PRISMSupportServices@DaVita.com">PRISMSupportServices@DaVita.com</a>







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### **Process – Create Invoices**

1. You will need an open Purchase Order to process an invoice in CSP. In the Purchase Order screen, click Create Invoice.

						Advanced Sea	arch	P Sort by Line	Number: $0 \rightarrow 9$
1	Type Item			Qty	Unit	Price	Total		Invoice
	🛒 test			1	EA	100.00	100.00		0.0
	Part Number	Manufacturer Name	Manufactu	rer Part I	Number				
	None	None	None						
		00							
Per	page 15   45	90							
Per	page <mark>15   45</mark>	90							
Per	page 15   45	90						Total USD 100.00	

2. Complete all required fields on the Invoice, including invoice # (Note: this must be a unique number) invoice date, and Image Scan.

eneral Info	)		From	
" Invoice #	8092813	0	* Supplier	E AND R JANITORIAL SERVICES
* Invoice Date	02/28/22 🛗		Supplier Tax ID	~
Payment Term	NET 30		* Invoice From Address	E AND R JANITORIAL SERVICES
* Currency	USD 🖌			9044 Fairwood Dr Seattle, WA 90023
ទានបេទ	-/ran			United States
Image Scan	Choose File No file chosen		* Remit-To Address	E AND R JANITORIAL SERVICES
				9044 Fairwood Dr
Supplier Note				Seattle, WA 90023
		04		United States
		4	* Ship From Address	E AND R JANITORIAL SERVICES
Attachments ,	Add File   URL   Text			9044 Fairwood Dr
				Seattle, WA 90023

3. Confirm all line item details. Values will pre-populate from the Purchase Order. If you do not wish to invoice the full order, then you can change the quantity or price.

Туре	Description Qty UOM Pri		ice	100.00		
est test	test	1.00	EA	~	100.00	100.00
PO Line		Contract		Supplier I	Part Number	Serial Number
DVA-000	78627-1 O Clear	Contract		Supplier	art Number	Serial Number

4. Click Submit to send the invoice to DaVita.



\*For additional details on how to submit invoices via the Coupa Supplier Portal, please see the Job Aid titled *How to Create an Invoice via PO Flip in the CSP* 

### Revised 2/01/2025For questions contact <a href="mailto:PRISMSupportServices@DaVita.com">PRISMSupportServices@DaVita.com</a>





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# Job Aid – Supplier: How to Navigate the CSP – Coupa Tool

### How to Navigate the Coupa Supplier Portal (CSP)

### **Process – View Invoice and Payment Status**

- 1. Navigate to the Invoices tab to review all Invoices that you have sent DaVita.
- 2. Make sure that "DaVita Inc" is the Selected Customer.
- 3. On the Invoice table, review the Status to determine if the invoice was Approved. (Note: Click the Invoice # to open and review invoice details).

<b>森coup</b> a	a supplier	portal		_				COUPA	VINOTIFIC	ATIONS 11
Home	Profile C	orders Servic	e/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing	Add-ons	Setup
Invoices	Invoices Lines	Payment Recei	pts							
							Select Customer	DaVita Inc -	TEST ENV	
	Invoic	es								
	Create l	nvoices 🕧								
	Create Inv	oice from PO	Create Invoice fro	om Contract	Create E	Blank Invoid	Create Credit Note			
	Export to	<b>~</b>					View All	✔ Se	arch	$\mathcal{P}$
	Invoice #	Created Date	Status	PO #	Total	ι	Inanswered Comments	Dispute Reas	on Act	ions
	6435435	02/28/22	Approved	DVA-00078627	7 100.00	USD N	0			

4. To view Payment Status, scroll to the bottom of the invoice and review Payments

💼 Pay	ments
	Status Fully Paid
Paid	n-Full Date 03/01/22

5. If you have a question regarding your invoice payment status, use the comments section to send a message to the DaVita requestor or DaVita Accounts Payable. By using the @ symbol, you may send targeted comments to DaVita. (Note: The comment section is available on both Purchase Orders and Invoices).

2 comments	Mute Comments
Enter Comment	
[@rachelallmendingerthehackettgroup.com] Please let me know if you need any further information	
end Comment notification to a user by typing @name (ex. @JohnSmith)	
Attachments Add File   URL	

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