

## 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)**

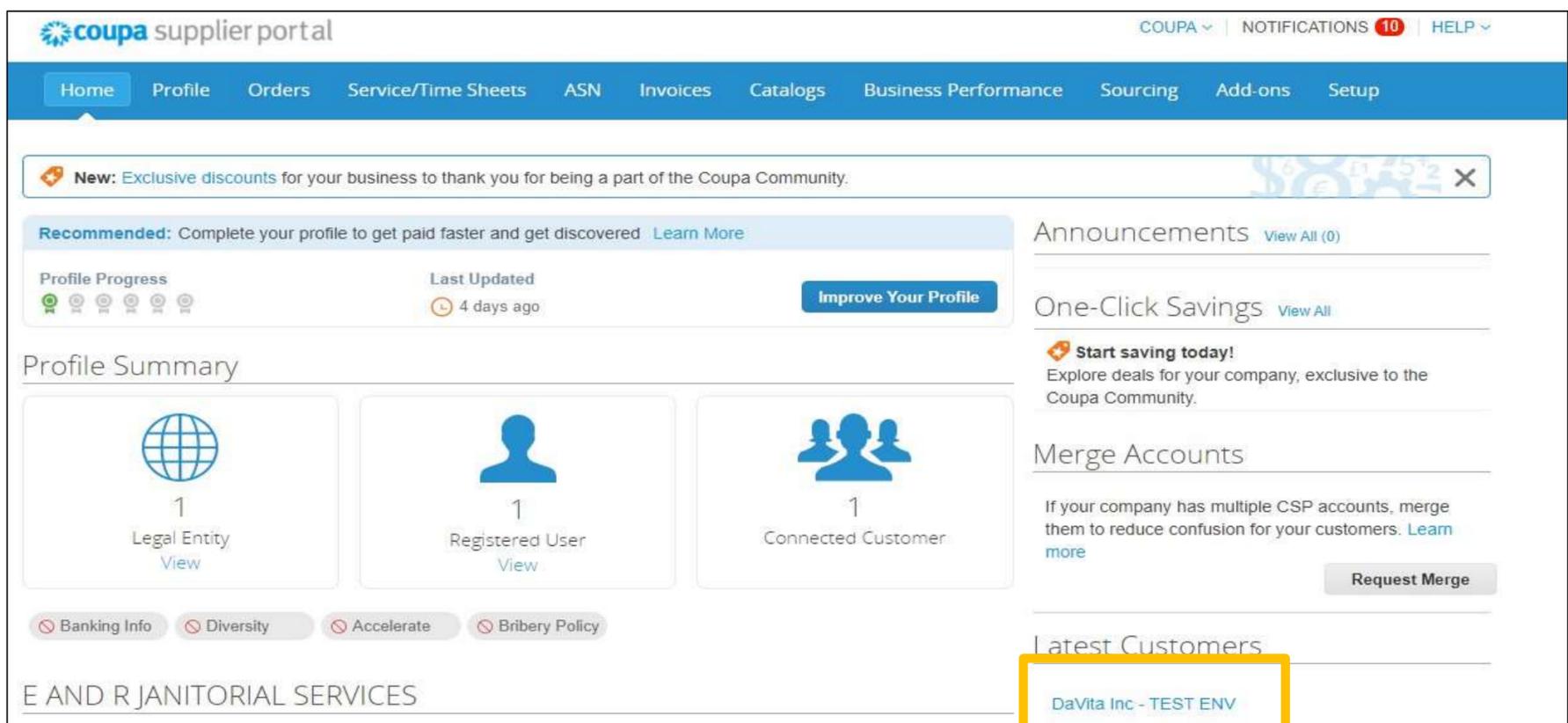
This job aid demonstrates how suppliers can navigate within the Coupa Supplier Portal (CSP). The Coupa Supplier Portal is a free tool for suppliers to manage company information, review purchase orders, create invoices, and view payment status.

#### 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, <https://www.davita.com/about/suppliers>.
- If you are unable to find your CSP invitation from DaVita, please reach out to [PRISMSupportServices@DaVita.com](mailto:PRISMSupportServices@DaVita.com).

#### Process - Login

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



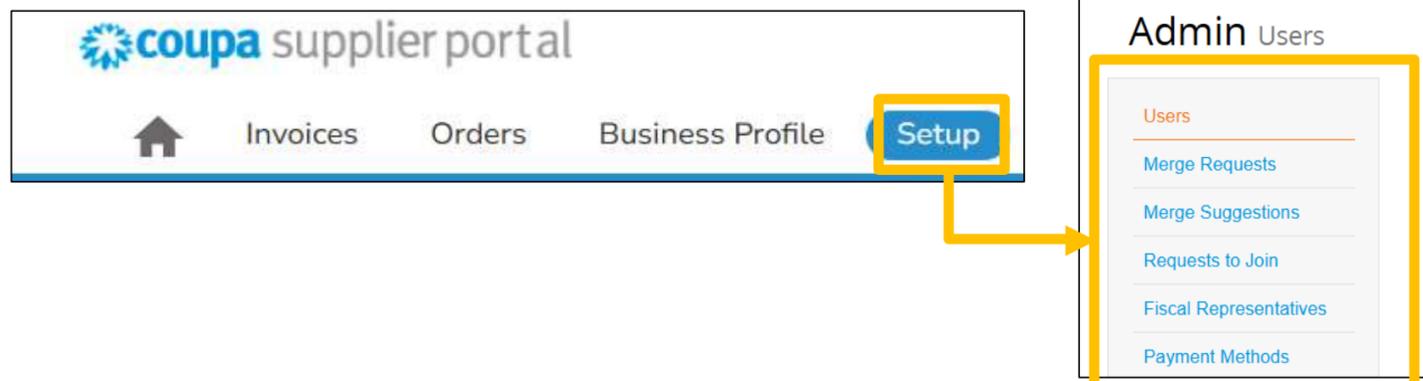
2. Once you are connected with DaVita, you can:
  - a) Manage company information
  - b) Review purchase orders
  - c) Create invoices
  - d) View payment status

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

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

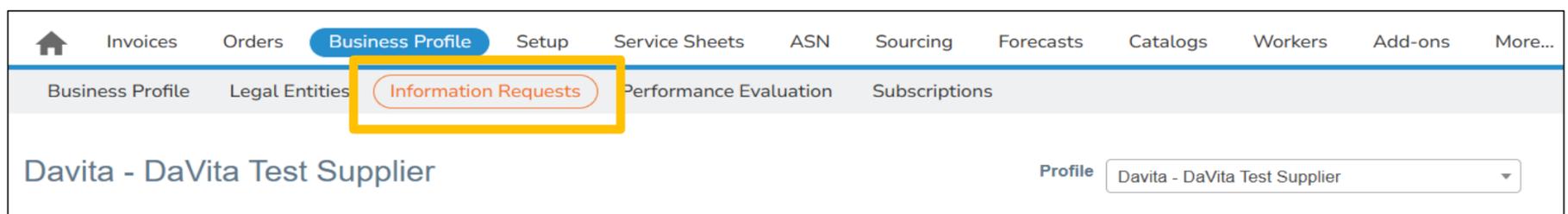
#### Process – Manage Company Information

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.



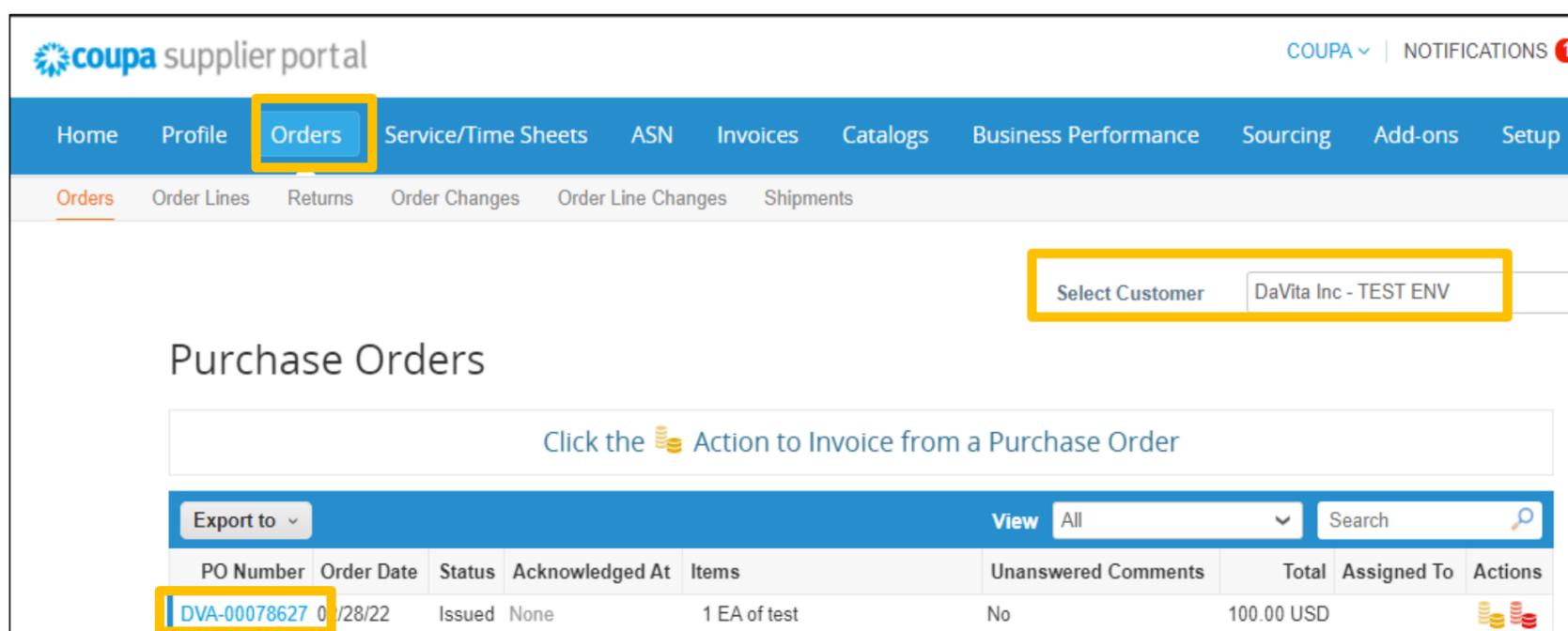
2. If you are a new supplier at DaVita, navigate to Business Profile -> Information Requests (as seen below) and complete the onboarding form. Once complete, ensure you submit your onboarding form to DaVita for review.
3. If you are an existing supplier at DaVita, navigate to Business Profile -> Information 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 [DaVitaCoupaSuppliers@DaVita.com](mailto:DaVitaCoupaSuppliers@DaVita.com).



#### Process – Review Purchase Orders

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.



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

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

#### 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.

The screenshot shows the 'Lines' section of the Coupa interface. It features a table with columns: Type, Item, Qty, Unit, Price, Total, and Invoiced. A single line item is listed with 'test' as the item name, a quantity of 1, and a price of 100.00. Below the table, there are fields for Part Number, Manufacturer Name, and Manufacturer Part Number, all set to 'None'. At the bottom right, a 'Total USD 100.00' is displayed. The 'Create Invoice' button is highlighted with a yellow box.

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

The screenshot shows the 'Create Invoice' form. Fields highlighted in yellow include:
 

- \* Invoice #: 8092813
- \* Invoice Date: 02/28/22
- Image Scan: Choose File (No file chosen)

 Other visible fields include:
 

- \* Supplier: E AND R JANITORIAL SERVICES
- \* Invoice From Address: E AND R JANITORIAL SERVICES, 9044 Fairwood Dr, Seattle, WA 90023, United States
- \* Remit-To Address: E AND R JANITORIAL SERVICES, 9044 Fairwood Dr, Seattle, WA 90023, United States
- \* Ship From Address: E AND R JANITORIAL SERVICES, 9044 Fairwood Dr, Seattle, WA 90023, United States

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.

The screenshot shows the 'Lines' screen with a line item. The 'Qty' field is set to 1.00 and the 'Price' field is set to 100.00. Both fields are highlighted with yellow boxes. The total for the line is 100.00. Below the line item, there are fields for PO Line (DVA-00078627-1), Contract, Supplier Part Number, and Serial Number.

4. Click Submit to send the invoice to DaVita.

The screenshot shows a blue 'Submit' button with white text, highlighted with a yellow border.

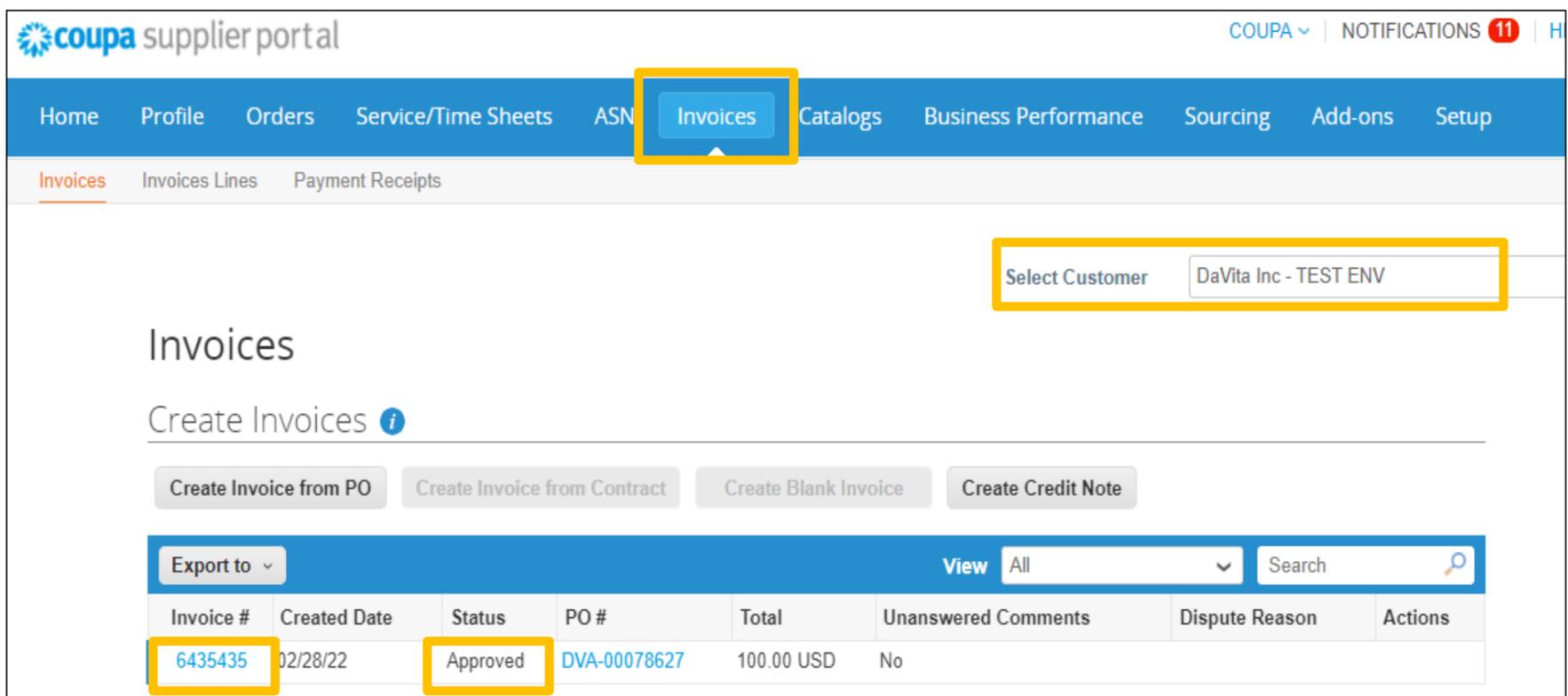
\*For additional details on how to submit invoices via the Coupa Supplier Portal, please see the Job Aid titled *How to Create an Invoice via PO Flip in the CSP*

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

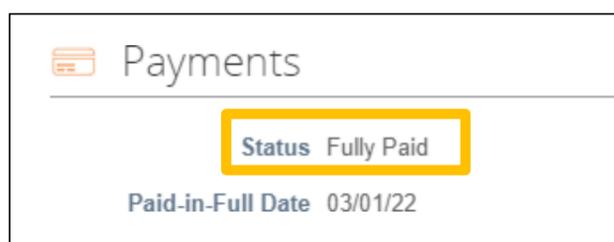
## How to Navigate the Coupa Supplier Portal (CSP)

### 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).



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



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).

