

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.
- Effective February 21, 2022, new 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 DaVitaCoupaSuppliers@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”.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there's a 'New' notification about exclusive discounts. A 'Recommended' section prompts the user to complete their profile. The 'Profile Summary' section shows '1 Legal Entity', '1 Registered User', and '1 Connected Customer'. On the right, there are sections for 'Announcements', 'One-Click Savings', and 'Merge Accounts'. At the bottom right, the 'Latest Customers' link is highlighted with a yellow box. The page footer includes 'E AND R JANITORIAL SERVICES' and 'DaVita Inc - TEST ENV'.

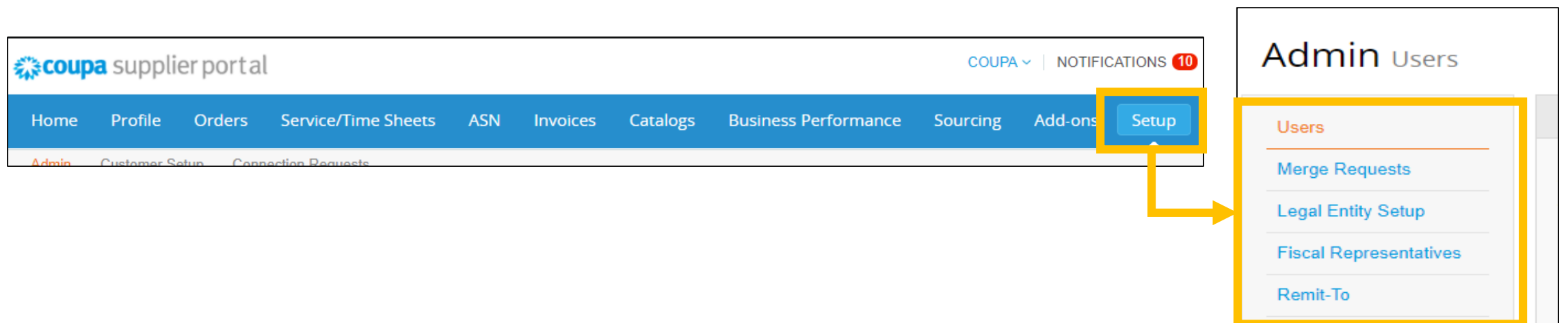
2. Once you are connected with DaVita, you can:
 - a) Manage company information
 - b) Review purchase orders
 - c) Create invoices
 - d) View payment status

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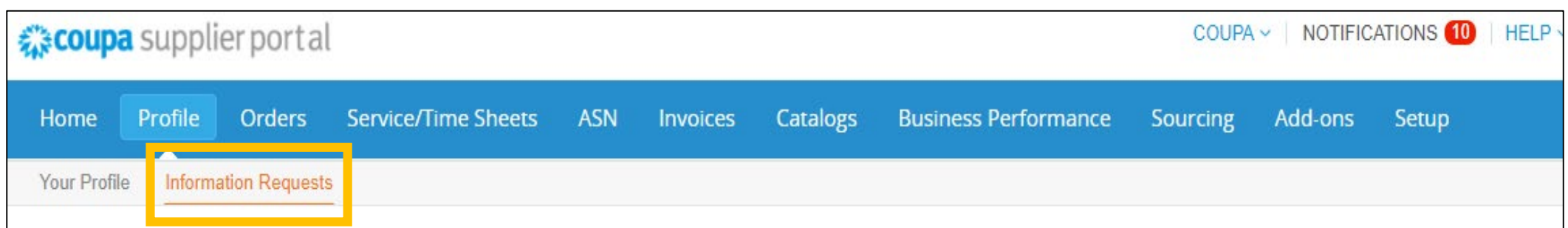
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Process – Manage Company Information

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

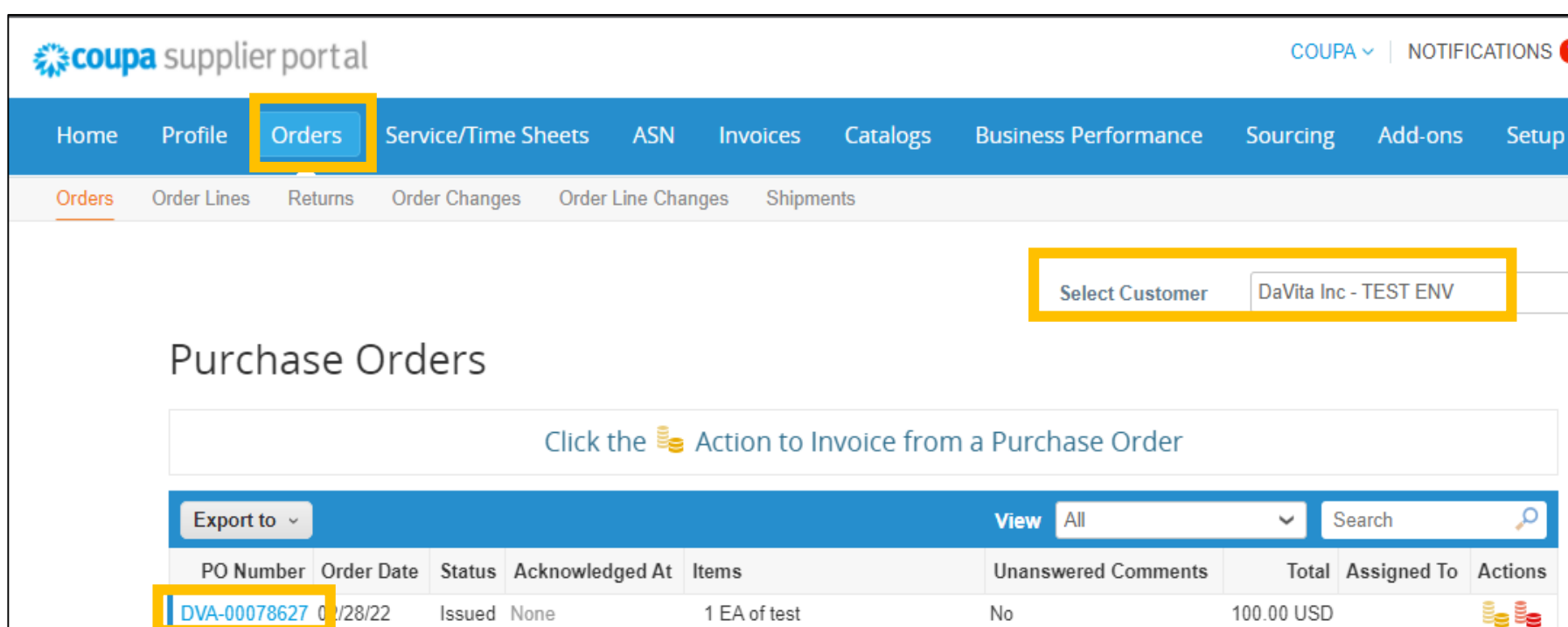


2. If you are a new supplier at DaVita, navigate to the Information Requests tab and complete the onboarding form. Once complete, ensure you submit your onboarding form to DaVita for review.
3. If you are an existing supplier at DaVita, navigate to the Information Requests tab to review and validate 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.



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. (Note: To reject a PO, please see the “How to Reject a PO” job aid for additional information.)



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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.

The screenshot shows the 'Lines' screen in the Coupa Supplier Portal. It features a table with the following data:

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		test	1	EA	100.00	100.00	0.00

Below the table, there are fields for 'Part Number', 'Manufacturer Name', and 'Manufacturer Part Number', all containing 'None'. At the bottom right, a summary box shows 'Total USD 100.00'. A yellow box highlights the 'Create Invoice' button at the bottom center.

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

The screenshot shows the 'Create Invoice' form. The 'General Info' section contains the following fields:

- Invoice #**: 8092813 (highlighted in yellow)
- Invoice Date**: 02/28/22 (highlighted in yellow)
- Payment Term**: NET 30
- Currency**: USD
- Status**: Draft
- Image Scan**: Choose File (No file chosen)
- Supplier Note**: (Empty text area)
- Attachments**: Add File | URL | Text

The 'From' section contains the following information:

- Supplier**: E AND R JANITORIAL SERVICES
- Supplier Tax ID**: (Dropdown menu)
- 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 single line item. The 'Qty' and 'Price' fields are highlighted in yellow. The 'Price' field has a red 'x' icon next to it, indicating it is required.

Type	Description	Qty	UOM	Price	Total
	test	1.00	EA	100.00	100.00

Below the table, there are fields for 'PO Line' (DVA-00078627-1), 'Contract' (dropdown), 'Supplier Part Number' (text input), and 'Serial Number' (text input).

4. Click Submit to send the invoice to DaVita.

A blue 'Submit' button with a yellow border, used to send the invoice to DaVita.

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Process – View 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).

coupa supplier portal

COUPA | NOTIFICATIONS 11 | H

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer DaVita Inc - TEST ENV

Invoices

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
6435435	02/28/22	Approved	DVA-00078627	100.00 USD	No		

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

Payments

Status Fully Paid

Paid-in-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. By using the @ symbol, you may send targeted comments to DaVita. (Note: The comment section is available on both Purchase Orders and Invoices).

Comments Mute Comments

Enter Comment

[@rachelallmendingerthehackettgroup.com] Please let me know if you need any further information

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

Add Comment