

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 displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. The main navigation menu includes: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. A notification banner at the top right shows 'COUPA', 'NOTIFICATIONS 10', and 'HELP'. Below the navigation, a 'New' banner offers 'Exclusive discounts'. A 'Recommended' section suggests completing the profile. The 'Profile Summary' section features three cards: '1 Legal Entity', '1 Registered User', and '1 Connected Customer'. At the bottom right, the 'Latest Customers' section lists 'DaVita Inc - TEST ENV', which is highlighted with a yellow box.

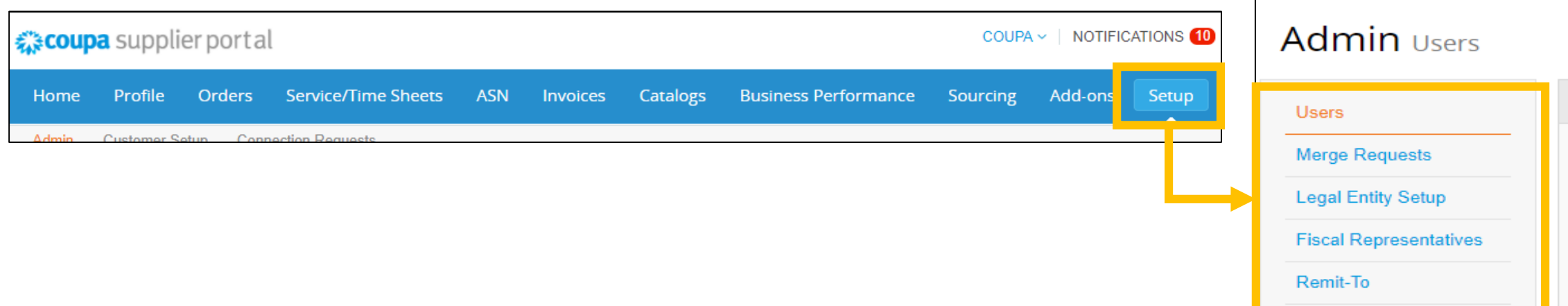
2. Once you are connected with DaVita, you can:
 - a) Manage company information
 - b) Review purchase orders
 - c) Create invoices
 - d) View payment status

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

How to Navigate the Coupa Supplier Portal (CSP)

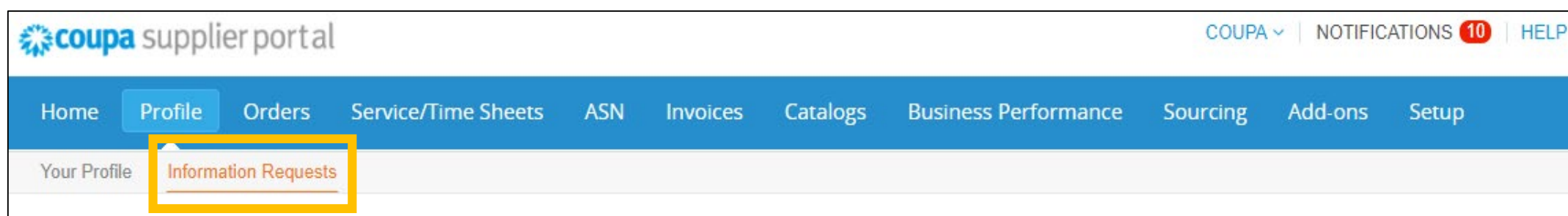
Process – Manage Company Information

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



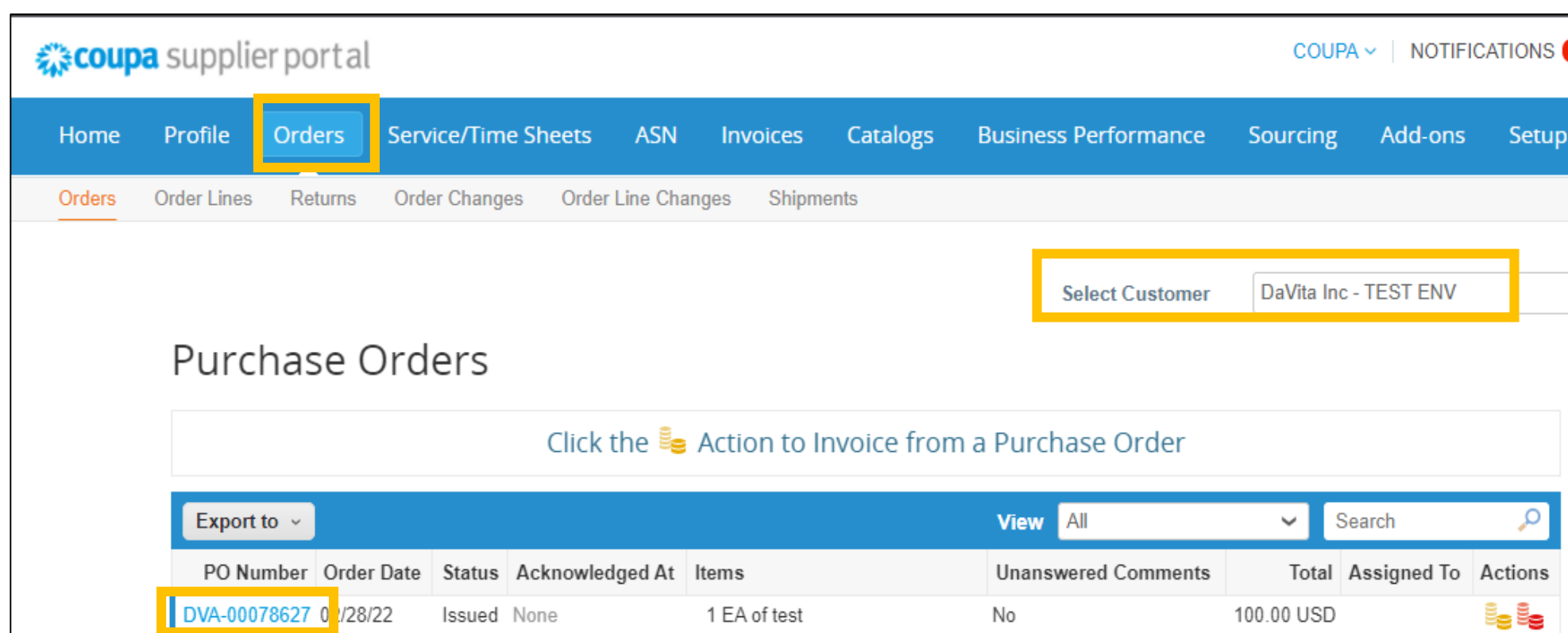
2. If you are a new supplier at DaVita, navigate to Profile -> Information Requests (as seen below) and complete the onboarding form. Once complete, ensure you submit your onboarding form to DaVita for review.
3. If you are an existing supplier at DaVita, navigate to Profile -> Information Requests (as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



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.)



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 visible 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) and invoice date.

The screenshot shows the 'Create Invoice' form. It is divided into 'General Info' and 'From' sections. In the 'General Info' section, the 'Invoice #' field (containing '8092813') and the 'Invoice Date' field (containing '02/28/22') are highlighted with yellow boxes. Other fields include 'Payment Term' (NET 30), 'Currency' (USD), 'Status' (Draft), and 'Image Scan' (Choose File). The 'From' section includes 'Supplier' (E AND R JANITORIAL SERVICES), 'Supplier Tax ID', and three address fields: 'Invoice From Address', 'Remit-To Address', and 'Ship From Address', all pointing to the same supplier address.

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' field (containing '1.00') and the 'Price' field (containing '100.00') are highlighted with yellow boxes. The 'Description' is 'test' and the 'UOM' is 'EA'. 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.

A blue button with the text 'Submit' in white, 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 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