



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

# Quick Reference Guide

## Contents

- Supplier Registration Overview..... 3
- Supplier Information Update Form ..... 3
- Supplier Information Update Fields & Filling Them Out ..... 12
- Coupa Supplier Portal Main Menu ..... 14
- FAQ's ..... 15
- Additional Coupa Resources ..... 16

# Quick Reference Guide

## 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**

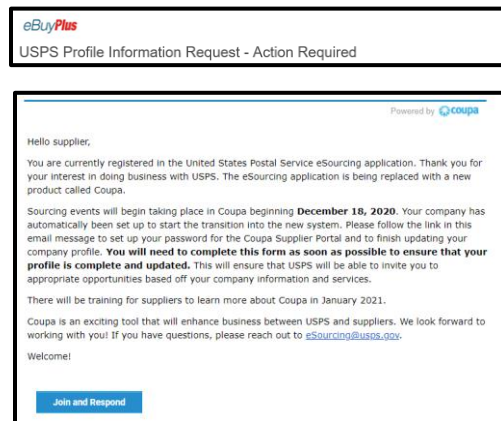
Please select one primary contact who will oversee and maintain your company's profile in the Coupa Supplier Portal. The user you add will be the primary contact for your company when invited to USPS solicitations. Please be sure to keep this information updated and correct to ensure you have an active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



# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

The screenshot shows the 'Create your business account' page. At the top left is the Coupa logo. The heading is 'Create your business account'. Below it, a message states: 'USPS Sandbox NON PROD is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with USPS Sandbox NON PROD so you're ready to do business together.' The form includes fields for 'Email' (with the value 'ebysourcingsim+CentralPerk@gmail.com'), 'Password', and 'Password Confirmation'. A note below the password field says 'Use at least 8 characters and include a number and a letter.' There is a checkbox for 'I accept the Privacy Policy and the Terms of Use.' An orange 'Get Started' button is at the bottom. Below the button are links for 'Having an issue with signup?' and 'Forward this to someone'.

The screenshot shows a welcome message from the Coupa Supplier Portal. It is titled 'Hello Supplier,' and is powered by Coupa. The message says: 'The Postal Service welcomes you to our new Electronic Sourcing (eSourcing) platform. In order to complete your registration, we need additional information about your company so that we may consider you for future opportunities. Please follow the link in this e-mail message to set up your password for the Coupa Supplier Portal (CSP), and finish updating your company's profile. Our support team will follow up with additional notifications, as necessary.' It also states: 'If the profile is not complete in the next two days, you will receive an automated reminder to complete your company's profile. You can also expect to receive additional reminders over the next 30 days until your profile is complete.' The message ends with 'Thank you' and a blue 'Join and Respond' button.

**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.

The screenshot shows the 'Tell us about your business' form in the Coupa Supplier Portal. It is powered by Coupa and is part of a 'Sandbox' environment. The form is titled 'Tell us about your business' and has a progress indicator with three steps: 'Basics' (highlighted with a green box), 'Payment', and 'Profile'. The form fields include: 'Company Name' (Sourcing Supplier3), 'Website', 'Country/Region' (United States), 'Address Line 1' (123 Main St), 'Address Line 2', 'City' (Alberta), 'State' (OK), and 'Postal Code' (99923). There are checkboxes for 'Also use this address as' with options: 'Invoice-from location', 'Pay to location (Remit-To)', and 'Ship from location'. There is also an 'Advanced invoicing' section with a checkbox for 'We support integration for invoicing (cXML or SFTP) and plan to use it with USPS Sandbox NON PROD'. A blue 'Next' button is at the bottom right.

**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

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

UNITED STATES POSTAL SERVICE  
Sandbox

Powered By **coupa**

Basics Payment Profile

Tell us about your business ⓘ

Please fix the errors below ✕

\* Company Name Sourcing Supplier3  
Your official registered company name

Website

\* Country/Region United States

\* Address Line 1 123 Main St

Address Line 2

\* City Alberta

State OK

\* Postal Code 99923

Also use this address as  Invoice-from location  
Must match your official registered company address

Pay to location (Remit-To)

Ship from location

Advanced invoicing  We support integration for invoicing (cXML or SFTP) and plan to use it with USPS Sandbox NON PROD

Next

**Step 4:** 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**.

UNITED STATES POSTAL SERVICE  
Sandbox

Powered By **coupa**

Basics Payment Profile

Tell us about your business ⓘ

Please fix the errors below ✕

\* Company Name Sourcing Supplier3

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

coupa supplier portal

SUPPLIER3 | NOTIFICATIONS | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Addresses Setup

Admin Customer Setup

Customer Setup

USPS\_Sandbox\_NON\_PROD

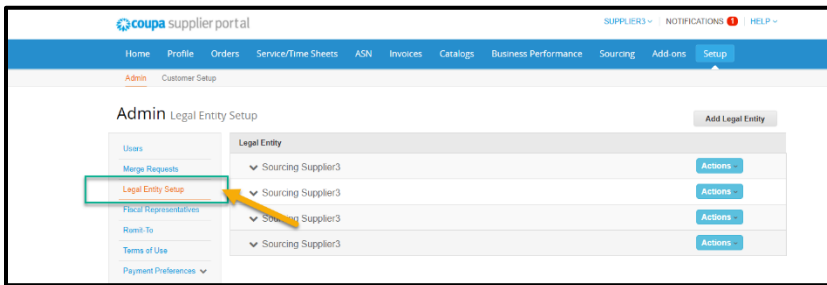
You are a few steps away from doing business with USPS Sandbox NON PROD

Start

UNITED STATES POSTAL SERVICE  
Sandbox

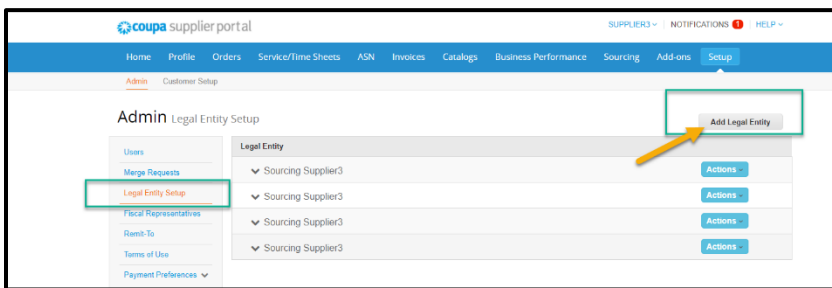
# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)



**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)

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

**Step 8:** Click **Add Legal Entity**

and click **Continue**.

**Step 9:** Complete the information in the setup

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

### Tell your customers about your organization

Which customers do you want to see this?

All  
 USP & Sandbox NON PROD

What address do you invoice from?

\* Address Line 1   
Address Line 2   
\* City   
State   
\* Postal Code   
Country/Region

Use this address for Remit-To  
 Use this for Ship From address

**REQUIRED FOR INVOICING**  
Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

Country/Region   
Tax ID   
 I don't have Tax ID Number  
[Add additional Tax ID](#)

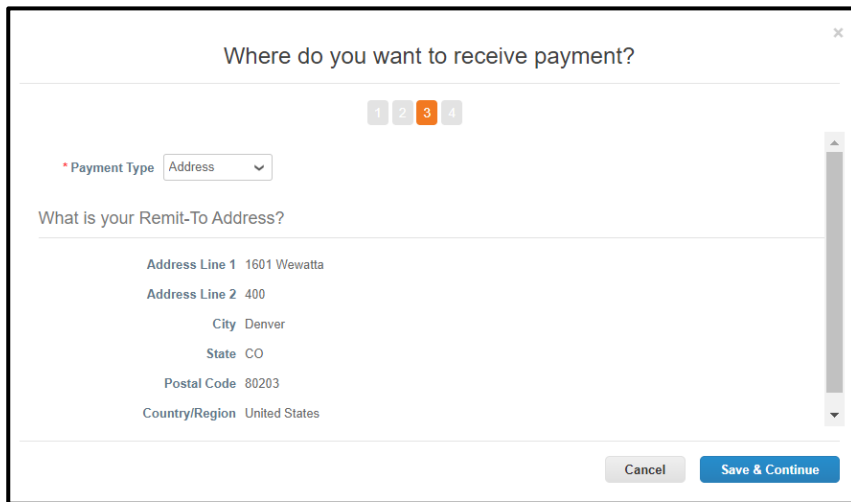
Miscellaneous

Invoice From Code   
Preferred Language

**Step 10:** Fill in Address and hit **Save & Continue**.

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)



Where do you want to receive payment?

1 2 3 4

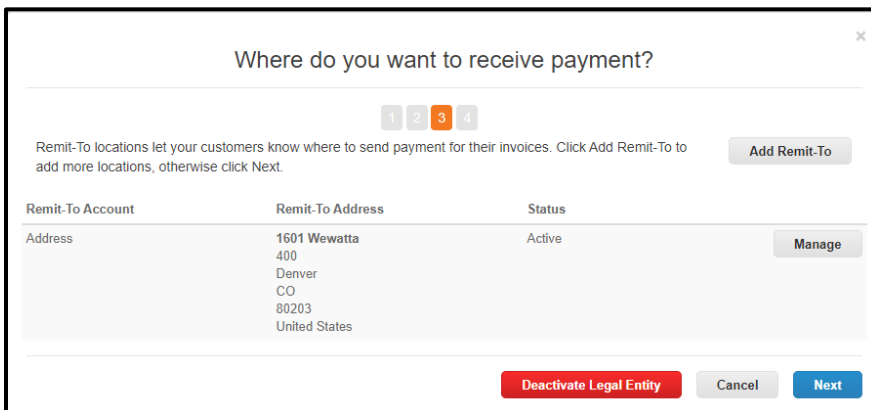
\* Payment Type Address

What is your Remit-To Address?

Address Line 1 1601 Wewatta  
Address Line 2 400  
City Denver  
State CO  
Postal Code 80203  
Country/Region United States

Cancel Save & Continue

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



Where do you want to receive payment?

1 2 3 4

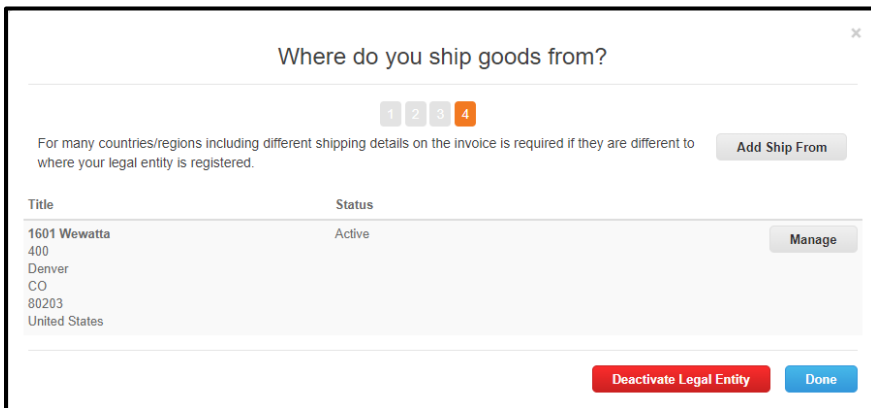
Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	1601 Wewatta 400 Denver CO 80203 United States	Active	Manage

Deactivate Legal Entity Cancel Next

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



Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
1601 Wewatta 400 Denver CO 80203 United States	Active	Manage

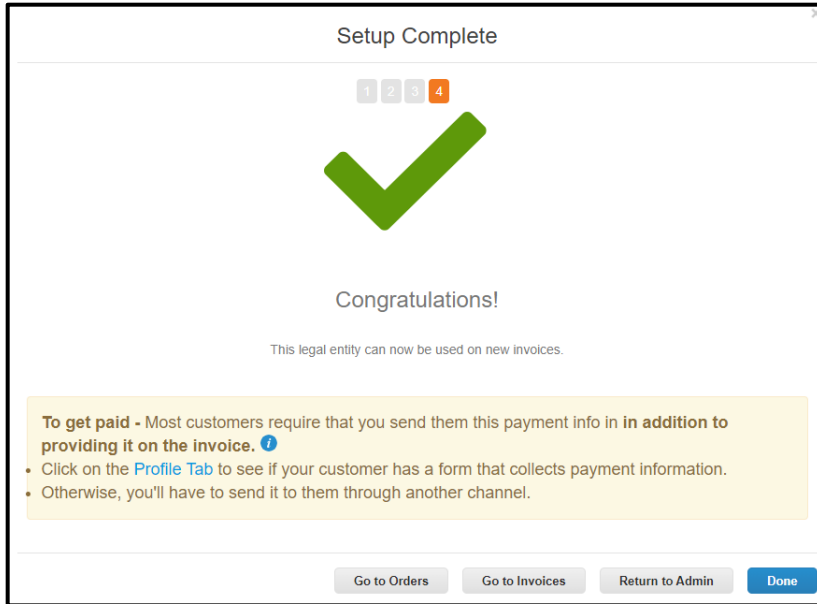
Deactivate Legal Entity Done

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

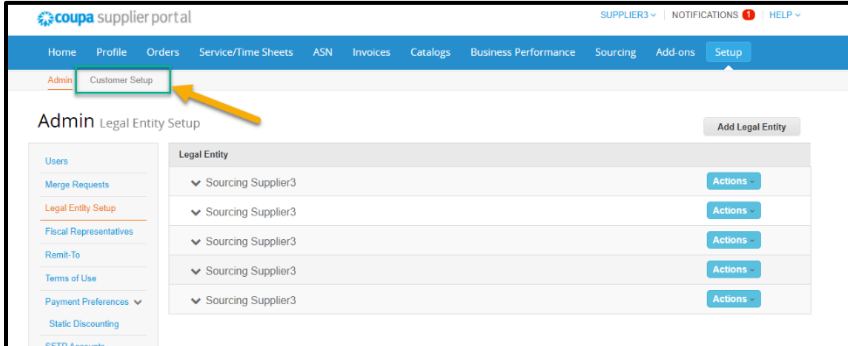


# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)



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



**Step 15:** Navigate to **Customer Setup**

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

UNITED STATES POSTAL SERVICE  
Sandbox

Powered By **coupa**

Basics **Payment** Profile

Would you like to offer discounts to get paid faster? ⓘ

Payment Discount Preferences

Your default payment term

Net 30	▶
Net 45	▶
Net 60	▶
Net 75	▶
Net 90	▶
Net 120	▶

Automatically replace with this discount  
(you can change this later)

None	▼
None	▼
None	▼
None	▼
None	▼
None	▼

Use these preferences for all your customers

Back **Next**

**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**.

UNITED STATES POSTAL SERVICE  
Sandbox

Powered By **coupa**

Basics **Payment** Profile

You are one step away from doing business with USPS Sandbox NON PROD !

USPS Sandbox NON PROD requires some additional information

**Take Me There**

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

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below this, the user is logged in as 'SOURCER3' and has access to 'NOTIFICATIONS' and 'HELP'. The main content area is titled 'USPS Sandbox NON PROD' and shows a 'Supplier Information' section for 'Sourcing Supplier3'. The form includes fields for 'Supplier's Name', 'Is there a Parent Company?', 'DUNS Number', 'Organization Type', and 'Country of Operation'. A 'Primary Address' section contains fields for 'Country/Region', 'Address Name', 'Street Address', 'Street Address 2', 'City', 'State Region', 'Postal Code', and 'Location Code'. A note indicates that USPS requires a DUNS number to be provided as a unique company identifier.

**Step 18:** 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.

The screenshot shows the bottom of the form with three buttons: 'Decline', 'Save', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted in blue.

# Quick Reference Guide

## 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 <a href="https://www.dnb.com/duns-number.html">https://www.dnb.com/duns-number.html</a> 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 <a href="http://www.naics.com">www.naics.com</a> 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 <a href="http://www.naics.com">www.naics.com</a> 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 <a href="http://www.naics.com">www.naics.com</a> 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 <a href="http://www.naics.com">www.naics.com</a> to help you determine the most appropriate code for your company.	5 – 6 digit code (131415)

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

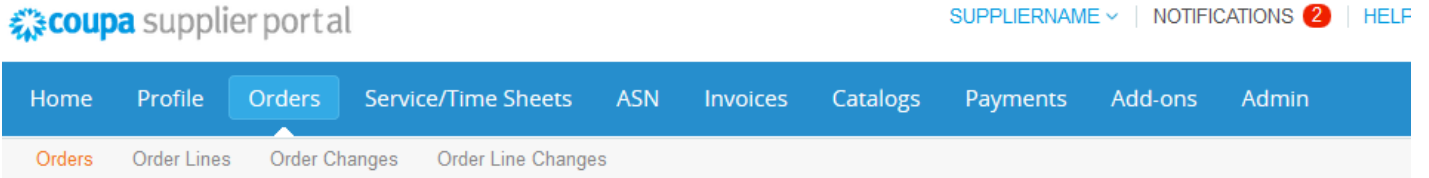
Supplier Information Update Field	Description	Input Examples
UNSPSC	The United Nations Standard Products and Services Code that enables buyers and sellers to describe goods and services; please use this site <a href="https://www.ungm.org/Public/UNSPSC">https://www.ungm.org/Public/UNSPSC</a> to help you 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?	<b>Will only apply to Transportation Supplier</b>	Yes, No
Service Types of Surface Transportation	<b>Will only apply to Transportation Suppliers</b>	Multi-Select
Service Types Selected	Internal Use Only – Do not fill this out	--
Surface Transportation Vehicle Types	<b>Will only apply to Transportation Suppliers</b>	Multi-Select
Vehicle Types Selected	Internal Use Only – Do not fill this out	--
Services offered Nationwide or by State?	<b>Will only apply to Transportation Suppliers</b>	Nationwide, State
Surface Transportation States Serviced	<b>Will only apply to Transportation Suppliers</b>	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	<b>Will only apply to Transportation Suppliers</b>	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

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

### 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.

# Quick Reference Guide

## 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](http://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](mailto: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](mailto: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](mailto: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.

# Quick Reference Guide

## Coupa Supplier Registration and Coupa Supplier Portal (CSP)

### Additional Coupa Resources

#### **Coupa Supplier Portal**

[https://success.coupa.com/Suppliers/For\\_Suppliers/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](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](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](https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_FAQ_and_Troubleshooting)