How to Update your CSP Profile

This step-by-step process shows how a Supplier can update their profile within the Coupa Supplier Portal (CSP).

STEPS

1. On the home screen, please navigate to "Setup" and then "Customer Setup"



2. Click "Edit Your Setup"



3. To edit/manage the Remit-to address(es) and Legal Entity, click "Actions" and then select your option:

🗱 coupa supplier po	ortal					CSP ~	NOTIFICATI	ONS 🕕 HELP ~
Home Profile Fo Setup	recasts Orders	Service/Time She	ets ASN	Invoices	Catalogs	Business Performance	Sourcin	g Add-ons
Admin Customer Setup Admin Legal Entity	/ Setup							Add Legal Entity
Users Merge Requests	Legal Entity CSP Demo							ctions ~
Merge Suggestions Requests to Join	Invoice From	Remit-To Accou	unts	Locations	l.n.	TAX IDs C	ustomers	Manage Legal Entity Manage Remit-To Accour Deactivate Legal Entity
Legal Entity Setup	Cleveland OH 44115	Remit-To Address	1234 Paint Ln Cleveland OH	Cleveland OH 44115				
Remit-To Additional CaaS	United States		44115 United States Active	United Sta	tes			
Information sFTP Accounts	4			-			-	•

4. To add/manage Remit-to Address(es):

🗱 coupa supr	lierportal			
Home Prof		Add a new Re	mit-To account	×
Admin Custor	Remit-To locations let your customer locations, otherwise click Next.	s know where to send payment for t	heir involces. Click Add Remit-To to add mo	re Add Remit-To
Admin Leg	Remit-To Account	Remit-To Address	Status	Add
Users	Address	1234 Paint Ln Cleveland	Active	Manage
Merge Requests		OH 44115		ctic
Merge Suggestions		United States		Mar
Requests to Join				Cancel Done Dea
Fiscal Representative	s 44115 United States	Address Creverand OH	44115 United States	_

- a. To Modify the Current Address:
 - i. Click "Manage" by the address you'd like to modify
 - ii. You can edit which Customers see this Remit-To and/or Deactivate this address

Add a new	w Remit-To account
* Payment Type Address 🖌	
What is your Remit-To Address?	
Address Line 1 1234 Paint Ln	
City Cleveland	
State OH	
Postal Code 44115	
Country/Region United States	
What is your Remit-To Integration Code?	>
Contact Information	>
Which customers can use this account?	
Z AII	
Sherwin-Williams	
	Cancel Deactivate Remit-To Continue

- b. To Add Remit-To Address:
 - i. Click "Add Remit-To"
 - ii. Select the Payment Type associated with this Remit-to Address: Bank Account, Address, or Virtual Payment
 - iii. Fill in questions related to the Payment Type
 - iv. Click "Save & Continue"

fil	× Setup Complete	
ne g z	Congratulations!	bi:
) Itiv	This legal entity can now be used on new involces.	
	 To get paid - Most customers require that you send them this payment info in in addition to providing it on the invoice. Click on the Profile Tab to see if your customer has a form that collects payment information. Otherwise, you'll have to send it to them through another channel. 	
to	Go to Orders Go to Invoices Return to Admin Done	

5. You can modify your payment information via Setup and Admin

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Home Profile Fo	recasts Orders	Service/Time Sheets ASN	N Invoices	Catalogs	Business Performance	Sourcing	Add-ons
Setup							
Admin Customer Setup	Connection Requests						
Admin Remit-To							Add Remit-To
Users	Remit-To Account	Remit-To Address		Payment Type	Legal Entity	Customers	Actions
Merge Requests	Huntington ****7890	123 Paint St Cleveland		Bank Account	SW CSP Demo	None	<i>ø</i> 💿
Merge Suggestions		OH 44115					
Requests to Join		United States					
Legal Entity Setup	None	123 Paint St Cleveland		Address	SW CSP Demo	None	<i>ø</i> 💿
Fiscal Representatives		OH 44115					
Remit-To		United States					
sFTP Accounts		Preferred Language: English	ו (US)				
cXML Errors							
sFTP File Errors (to							

		Add a new Remit-To ac	count	
* Payment Type	Bank Accou	nt 🛩		
What are your Ba	ank Acco	unt Details? 🥖		
Bani Countr	k Account ry/Region:	United States 🗸		
	State:	Select an Option		
Bank Account	Currency:	USD 🗸		
Beneficia	ary Name:	SW CSP Demo		
Ba	ank Name:			
Account	t Number:		0	
Confirm	n Account Number:			
ACH Routing	g Number:		0	
Wire Routing	g Number:		0	
SWIFT/	BIC Code:		0	
		My bank does not have a BIC code		
Brar	nch Code:			
Bank Acco	ount Type:	Business		
Supporting D	ocuments	Choose Files No file chosen		
Emai	il Address	cmdoran1988+40@gmail.com	0	
What is your Ren	nit-To Ad	dress?		
Saved Addresses	elect	~		
New Address			Recommended	
			If you receive payments to a different location to where your business is registered, add the address here.	
What is your Rem	nit-To Inte	egration Code? (optional) 🕖		
Who is your Rem	it-To Con	tact? (optional)		
Which customers	can use	this account?		

a. Add your new banking and any other requested information

6. You can update your Coupa Profile via "Profile" and "Edit Profile"

🗱 coupa supplier portal						CHRISTINA ~	NOTIFICATION	s 🚺 HELP 🗸
Home Profile Forecasts	Orders	Service/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing	Add-ons
Setup								
Your Profile								
Company Profile	÷Ø÷	Complete your profile to g	get discove	ered by Coupa	buyers that are	looking for items in your cate	gory.	
Environmental, Social, Governance & Diversity		SW CSP	Dem	0		Profile Progress	6%	
Risk & Compliance		3W 03F	Dem	0		Last Updated 2 m	minutes ago	Edit Profile
Financial Performance					Profile pr	eview Conv.profile LIRI		d Profile as PDF
Ratings & References					Profile pi	eview 1 copy profile OKE	Download	u Fronie as FDI

- a. From here, you can edit various aspects of your profile:
 - i. Company Picture
 - ii. Company Name, Doing Business As

* Company Name	Doing Business As 🥡	Is Ultimate Parent
SW CSP Demo		Yes No
		Yes O No

iii. Primary Address

Address Line 1			•
City	State	Postal Code	Country/Region

iv. Primary Contact

1 Hotograph		* Fin	st Name		
		Ch	ristina		
		* La:	st Name		
		Do	ran		
* Email		Role	•	Preferred Pl	none
				Work	~
		Alearony	Local		Extension
	\sim				
		Area/City	Local		Extension
Country/Region					
Country/Region Fax Phone					
Country/Region Fax Phone	~				

v. Company Information

/ear Established	Comp	any Size	\sim	Number Of Employees	
Ownership Type	Indust	try		PO Delivery Email	
	 ✓ Sele 	ct an Option	~		
UNS					
Secure Information - not published to you profile	ır public				
Country/Region		* Tax Registratio	on 🥡		
	\sim	############			

vi. Commodities

vii. Product and Service Categories

Product and Service Categories ()	
Search product and services	

viii. Areas Served

-		
Global		
Search areas		
lo coverage in areas		
Search areas		

ix. Online Presence

Website	Twitter	LinkedIn	
Facebook	Instagram	YouTube	

x. Once the information is filled in and/or updated, you'll click "Save Changes:

