

# Coupa Cheat sheet for the Procure to Pay Process – Coupa Tool

## Coupa Supplier Portal (CSP) Cheat sheet

In this cheat sheet:

### ✓ Coupa Supplier Portal (CSP) Cheat Sheet

This guide provides links and videos to assist navigating the CSP and invoicing for DaVita suppliers.

#### Step 1: Access Coupa Supplier Portal (CSP)

- New Coupa users: Proceed directly to step 2. Steps to help found here: [Setting up your Account for the First Time](#)
- Existing Coupa users should proceed to Step 4 IF DaVita Inc shows under “Connected Customers.”
  - If Davita Inc does not show up, please contact [davitacoupasuppliers@davita.com](mailto:davitacoupasuppliers@davita.com) to request an invite to connect in the CSP.

#### Step 2: Accept Invitation

- New Suppliers will have received an e-mail from Coupa, with text saying “Congratulations! A DaVita teammate has requested to add you as a supplier. Please accept DaVita’s electronic handshake by email.”
    - *\*Pro Tip! If you didn’t receive an invite email, check your spam folder*
- \*\*There is NO obligation for you to be “Coupa Verified” to transact with Davita\*\***

#### Step 3: Complete Information Request Form

- After submission, monitor your email for additional or clarifying requests from Davita employees regarding your information.
    - Pro Tip! These requests can be found in the comments section at the bottom of the form
- \*\*Form expires after 30 days. Please act quickly\*\***

#### Step 4: Navigating the CSP

- Congratulations, you are on-boarded and enabled to transact with Davita!
  - Pro Tip! You will receive an email notification when your info is approved.

Frequently Asked Question: [CSP FAQ's](#)

#### Step 5: Invoicing Process

- Basic Invoicing: [How to create an invoice via PO flip \(Video\)](#)
  - Pro Tip! You must have an open Purchase Order to invoice Davita.
  - Pro Tip! If no Legal Entity is selectable on creating your invoice, contact [davitacoupasuppliers@davita.com](mailto:davitacoupasuppliers@davita.com)
- [View Open Purchase Orders](#)
- [Creating Credit Memo](#)
- [Viewing Invoice Status](#)

#### Managing Your User Base

- Need to manage who can invoice, create catalogs, see orders, or manage specific client relationships? Admins can change permissions or invite users.
- Click “Setup” and look for the user with “Admin” permissions.

Users	Permissions
Brian Powers [Redacted]@gmail.com Status: Active [Edit]	ASNs Admin Business Performance Catalogs Invoices

#### Process Improvement Opportunities

- [Create and Edit Catalogs](#) – Catalogs are presented to our employees for easy purchasing
- [How to create a PO Backed Loader File](#) – Allows you to create large invoice files
- [Submitting Invoices via SFTP](#) – Allows you to upload large invoice files to Coupa quickly and securely

#### Questions about other process improvement opportunities for your company?

Email [DavitaCoupaSuppliers@davita.com](mailto:DavitaCoupaSuppliers@davita.com) to see what other opportunities are available.