

Signing up for Coupa Supplier Portal & Updating Data

Quick Reference Guide (QRG)

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0. What's Included In This Guide?

Section Overview: This section provides an overview of what's included in this CSP & External Update guide.

Atlantic Aviation is transitioning to Coupa as our Procure to Pay (P2P) solution which will have some impact to the Suppliers we work with. Suppliers will need to register for the Coupa Supplier Portal (CSP). This guide provides step-by-step instructions on how to:

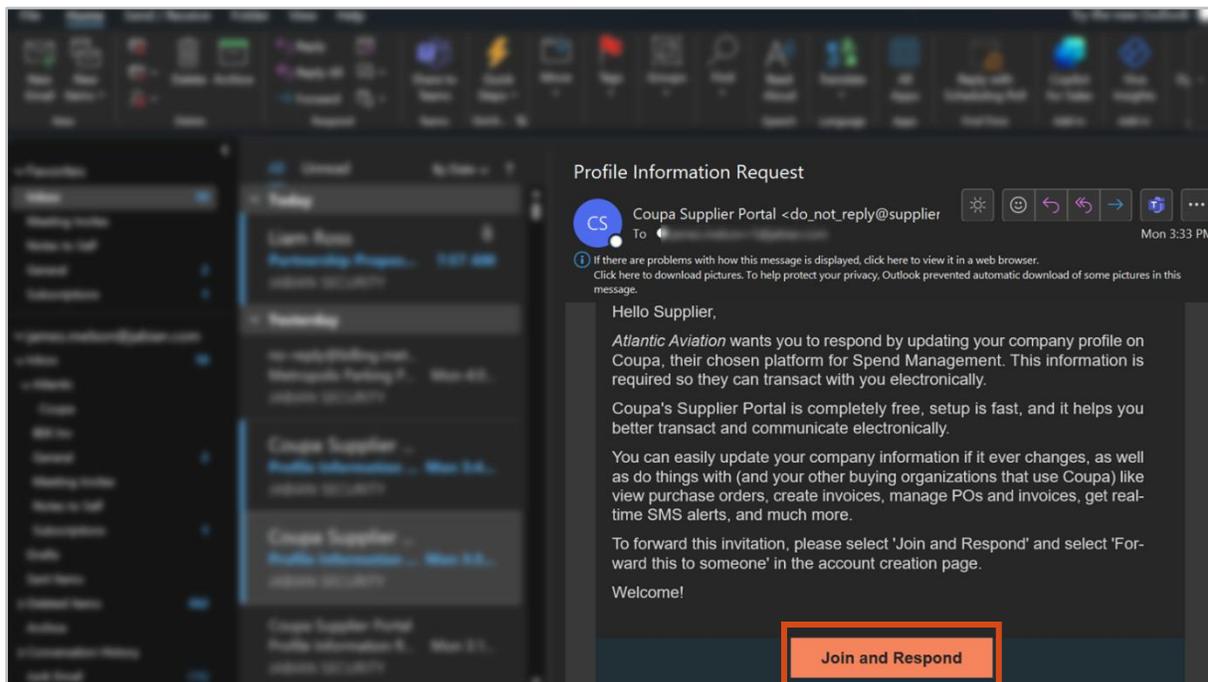
1. Creating an account on Coupa Supplier Portal (CSP)
2. Completing Atlantic Aviation Supplier Onboarding Forms
3. Updating Your Data in the Coupa Supplier Portal (CSP)

1. Registering for the Coupa Supplier Portal (CSP)

Section Overview: This section explains how to set up your account on the Coupa Supplier Portal.

1.1 Creating a Profile with Contact Information

1. If you are requested to participate in the Supplier onboarding process with Atlantic Aviation, you will receive an email inviting you to create a company profile on Coupa – click **“Join and Respond.”**



2. If you already have a CSP account with another customer, click **LOG IN** and proceed to **Section 2**. Otherwise, complete **all fields** on this page then click **Create an Account** .

*** Business Name**
Supplier123
Your legal business name (or legal personal name if an individual)

*** Email**
james.melson+5@jabian.com

*** First Name** John *** Last Name** Smith

*** Password** *** Confirm Password**
Use at least 8 characters and include a number and a letter.

*** Country/Region** United States *** Tax ID** 123456789
 I do not have a Tax ID

I accept the [Privacy Policy](#) and the [Terms of Use](#)

Create an Account

Already have an account? **LOG IN**

[Forward this to someone](#)

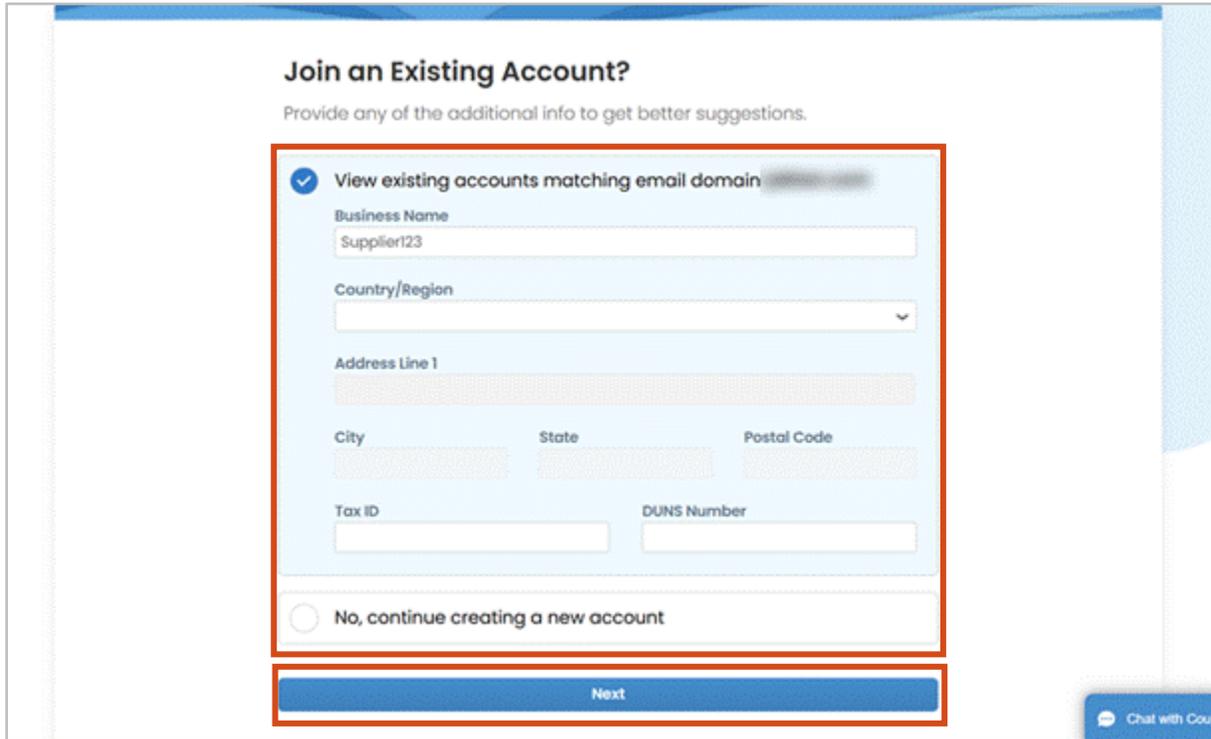
i **Tip:** Click **“Forward this to someone”** if another person at your company should fill out this form.

3. Complete the “Email Verification” by entering the code sent to your email address. Click

Next

The screenshot displays the 'Email Verification' page in the Coupa Supplier Portal. At the top left, the 'coupa supplier portal' logo is visible, and at the top right, there is a 'Secure' indicator with a lock icon. Below the header, there is a 'Back' link with a left-pointing arrow. The main heading is 'Email Verification', followed by the text 'We sent a one time verification code to [redacted email address]'. A light blue box contains six input fields with the numbers 6, 6, 1, 2, 4, and 1. Below this box, there is a link that says 'Didn't receive the Verification Code? Request a New Code'. At the bottom, a blue 'Next' button is highlighted with a red border.

- i Tip:** If your email domain is in use with an existing account(s), you will be asked if you want to join the associated account(s). Select **“View existing accounts...”** or **“No, continue creating a new account,”** then click  .



Join an Existing Account?
Provide any of the additional info to get better suggestions.

View existing accounts matching email domain [redacted]

Business Name
Supplier123

Country/Region
[dropdown]

Address Line 1
[text area]

City State Postal Code
[text area] [text area] [text area]

Tax ID DUNS Number
[text area] [text area]

No, continue creating a new account

Next

Chat with Cou

4. Complete the “**Primary Address**” section. Ignore the “Invoice From Code” field. Click

Next

Coupa Supplier Portal Onboarding

Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

[Account Details](#) [Payment Information](#)

Primary Address ✓

* Country/Region	* Address Line 1	Address Line 2
<input type="text" value="United States"/>	<input type="text" value="123 Business Street"/>	<input type="text"/> +
* City	* State	* Postal Code
<input type="text" value="Dallas"/>	<input type="text" value="Texas"/>	<input type="text" value="75001"/>

United States

Invoice From Code ?	Preferred Language
<input type="text"/>	<input type="text" value="English (US)"/>

Next

1.2 Completing Your Payment Information

1. Atlantic Aviation **will not** be utilizing the virtual card capability within Coupa at this time.

Check the box next to the words

Do not accept Virtual Card payments from this customer

. Click

Coupa Supplier Portal Onboarding

Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

✔ Primary Address saved successfully

Account Details Payment Information

Virtual Card ⓘ

Not Supported by Customer

Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ	* Email Address
<input type="text" value="MySupplier Pmt"/>	<input type="text" value="atlantic@atlantic.com"/>

Do not accept Virtual Card payments from this customer

2. Complete the “Bank Transfer” (ACH) information or check the box next to the words

Do not accept Bank Transfer payments from this customer . Click [Next](#) .

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Customer Supported

* Payment Method Name ⓘ

* Bank Account Country/Region * State * Bank Account Currency

United States ▼ ▼ USD ▼

Beneficiary Name Bank Name

Account Number ⓘ Confirm Account Number

ACH Routing Number ⓘ MICR Routing Number ⓘ

Do not accept Bank Transfer payments from this customer

Next

- **Payment Method Name** – Payment nickname (e.g. Supplier 123 ACH)
- **Bank Account Country/Region**
- **State**
- **Bank Account Currency** – defaulted to USD
- **Beneficiary Name**
- **Bank Name**
- **Account Number**
- **Confirm Account Number**
- **ACH Routing Number**

3. Complete the “Check” information or check the box next to the words

Do not accept Check payments from this customer . Click [Next](#) .

Check

Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region

United States ▼

* Street 1

Street 2

+ Street 3

* City

* State

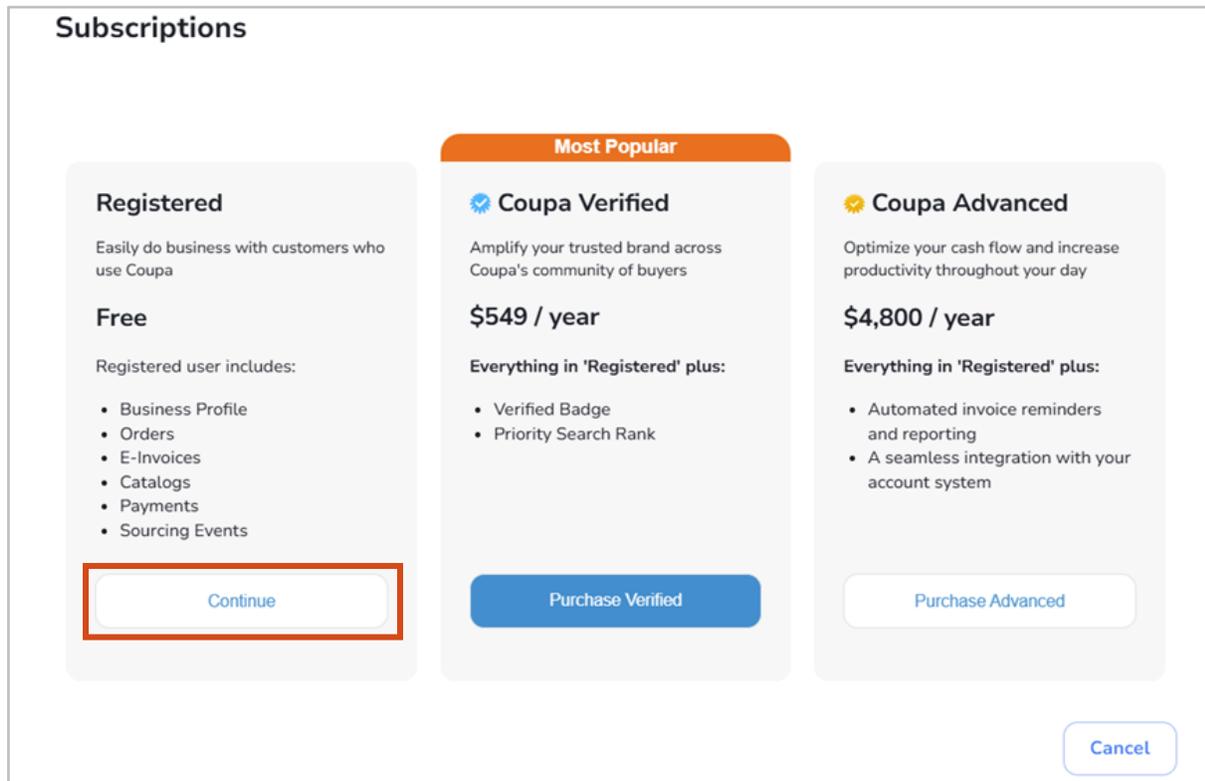
* Zip Code

My company does not accept Check payments.

[Next](#)

- **Payment Method Name**
- **Country/Region** – should be pre-populated
- **Street 1** – street number and name
- **City**
- **State**
- **Zip Code**

4. When this pop-up appears, click  to use the free version of Coupa.



Subscriptions

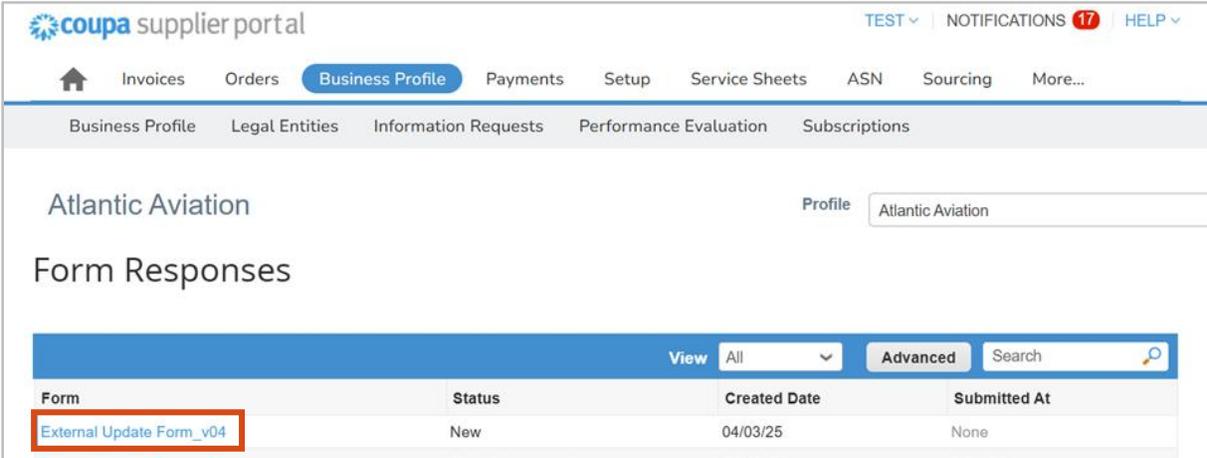
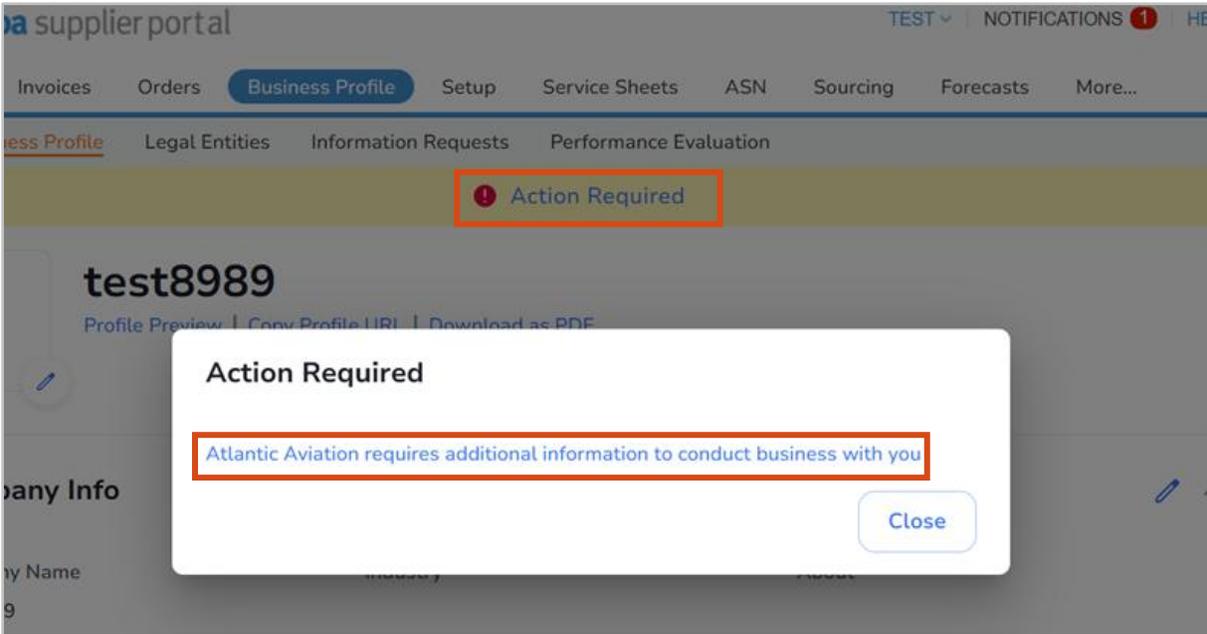
The image shows a 'Subscriptions' pop-up window with three main options: Registered, Coupa Verified, and Coupa Advanced. The 'Registered' option is highlighted with a red border around its 'Continue' button. The 'Coupa Verified' option is marked as 'Most Popular' and costs \$549/year. The 'Coupa Advanced' option costs \$4,800/year. A 'Cancel' button is located at the bottom right of the pop-up.

Subscription Type	Price	Key Features	Action
Registered	Free	Business Profile, Orders, E-Invoices, Catalogs, Payments, Sourcing Events	Continue
Coupa Verified (Most Popular)	\$549 / year	Verified Badge, Priority Search Rank	Purchase Verified
Coupa Advanced	\$4,800 / year	Automated invoice reminders and reporting, Seamless integration with your account system	Purchase Advanced

2. Completing Atlantic Aviation Onboarding Forms

Section Overview: This section shows how to fill out Atlantic Aviation’s onboarding forms with contact, tax, and payment information.

1. Once you’ve completed the initial Coupa onboarding forms, you will be directed to the **Coupa Supplier Portal (CSP)** home page. You will need to fill out Atlantic Aviation specific onboarding forms. Click **“Business Profile,”** then click **“Action Required,”** and then click on the dialog box that pops up. Then click **“External Update Form.”**



- i Tip:** If you don't receive the **"Action Required"** message, click on **"Business Profile"** and **"Information Request"** on your home screen.

coupa supplier portal JOHN ▾ | NOTIFICATIONS 0

[Home](#) [Invoices](#) [Orders](#) [Business Profile](#) [Payments](#) [Setup](#) [Service Sheets](#) [ASN](#) [Sourcing](#) [More...](#)

SU **Supplier123**
Profile Last Updated: about 2 hours ago | [View Profile](#)

Recent Activity

View ▾ i
Atlantic Aviation
Information Request Due Now Mar 11
Atlantic Aviation • Received today

Announcements

No Announcements

Multi Factor Security 0 of 1 Users	Join Requests 0 Users	Merge Suggestions 0 Duplicates	Linked Customers 1 Connection
--	---------------------------------	--	---

2. Complete the following required fields according to the guidelines below – some should pre-populate from your Public Profile and the original request filled out by Atlantic. Start with **General Information**.

Atlantic Aviation Profile Atlantic Aviation

✓ We have auto-filled some information from your Public Profile. ✕

[View All Responses](#)

External Update Form_v03
Supplier onboarding form. Also used for updates post-onboarding.

Supplier Information

* Supplier Name

Name on check if different from Supplier Name

* Website
 ⓘ

DUNS Number
 ⓘ

* Default Commodity

* PO Email
 ⓘ

- **Supplier Name** – should be pre-populated
- **Website** – your company url
- **Default Commodity** – should be pre-populated
- **PO Email** – email address to receive purchase orders from Atlantic

- Next, the **Primary Address** information – this is your **local address**, NOT your remit-to address.

• Primary Address

Address Purpose
Select Some Options !

• Region
Country/Region
United States ▼

State Region
Texas - TX ✕ ▼

• City
Dallas

• Postal Code
75001

Location Code

Please note: Updating your primary address will not update your remit to address - please confirm both are accurate. Remit to addresses will be displayed later in the form.

Street Address 2

! **Tip:** Note that updating this address information **will not update your remit-to address**.

4. **Fill out Primary Contact information**, preferably the person completing this form.

• Primary Contact

Contact Purpose
Select Some Options i

• First Name
Test

• Last Name
Supplier

• Email address
[Redacted]

• Work Phone
US/Canada +1 (555) 555-5555
650-555-1212

- **First & Last Name**
- **Email Address** – your work email
- **Work Phone** – enter digits only

5. If this data does not automatically populate, click **“Add Tax Registrations”** and fill out the following information
- **Country**
 - **Number** – tax ID number
 - **Tax Classification** – select from the drop-down
 - **Fill in any additional drop-downs that pop up from this step** (e.g., 1099 type)

***Tax Registrations**

Use this section to add all your applicable tax registrations.

[Add Tax Registration](#)

***Tax ID**

Country ✖

United States ▼

Tax ID

123456789

Local

***Tax Classification**

1099 ▼

***1099 Type**

Not a 1099 Vendor (Not a 1099 Vendor) ✖ ▼

6. W8 for (Foreign vendor) and W9 for (U.S. vendor)

- **Type** – select W8 or W9 from the drop-down
- **Attachments** – upload your W8 or W9

* W8 for (Foreign vendor) and W9 for (U.S. vendor)

* Type

W9

* Attachments

Add [File](#)

 coupa.jpg

W8(Rev. October 2021) and W9 (Rev. March 2024). Must be completed and signed within 1 year of date of request form.

- Click **“Yes”** or **“No”** for the question, **“Do you want to be paid via Check?”** This should pull up the check or bank transfer information you added when you set up your CSP account.

* Do you want to be paid via Check?

Yes

No

i Tip: If your payment information does not pop up after selecting “Yes” or “No,” click [Add Remit-To](#) to add it. Select a payment method added in **Section 1.2**, then click **“Add Selected.”** The  icon is for **ACH**, and the  icon is for **Check**.

*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

[Add Remit-To](#)

How would you like to be paid?

[All Methods](#) | [Bank Transfers](#) | [Checks](#) | [Credit Cards](#) [Add Payment Method](#) ▾

Atlantic Aviation supports Bank Transfers, Checks Payments.

<input checked="" type="checkbox"/>		Test Bank 123 Biz Street, Dallas, TX 75001, United States Account Number: ****779914 Transit Code: 111000025 Wire Routing Number	
<input type="checkbox"/>		123 Biz Street, Dallas, TX 75001, United States, United States (123456789)	
<input type="checkbox"/>		Test Method, 123 Biz Street, Dallas, TX 75001, United States, United States (123456789)	

[Cancel](#) [Add Selected](#)

8. Select the **payment type** based on your answer to the question, “Do you want to be paid via check?” If “Yes,” add the **check** payment method only. If “No,” add the **bank transfer** information only. Complete the fields called out below.

* Remittance/Payment Information

* Payment Type

ACH (DAC) x v

ACH (DAC)

Check (CHK)

Virtual Card (CCR)

Wire

Remit to Street Address 2

* Remit to City

Dallas

- **Remit-to Street Address** – should auto-populate
- **Remit-to City** – should auto-populate
- **Remit-to Country/Region** – should auto-populate
- **State Region** – should auto-populate
- **Remit-to Postal Code** – should auto-populate
- **Remit-to Contact Email** – email address for confirming payments
- **Beneficiary Name** – the person who receives the payment

9. For **ACH Payment Types only**, fill out the following fields

ACH Payment Type

Bank Name

If you selected ACH for Payment Type, Bank Name should automatically populate. If it is blank, please delete this entry using the red "x" icon next to the Payment Type field above. Then click "Add Remit-To", then click "Add Payment Method" and choose Bank Transfer.

Bank Address

if you selected ACH for Payment Type, please fill in this field.

Bank City

if you selected ACH for Payment Type, please fill in this field.

Bank State or Region

if you selected ACH for Payment Type, please fill in this field.

Bank Postal Code

if you selected ACH for Payment Type, please fill in this field.

Bank Account Number

 ⓘ

If you selected ACH for Payment Type, Bank Account Number should automatically populate. If it is blank, please delete this entry using the red "x" icon next to the "Payment Type" field above. Then click "Add Remit-To", then click "Add Payment Method" and choose Bank Transfer.

Banking Supporting Document

Attachments

Add [File](#)

TEST_INVOICE.docx

- **Bank Address**
- **Bank City**
- **Bank Postal Code**

i Tip: If **“Bank Name,” “Bank Account Number,”** and/or **“Bank Routing Number”** do not auto-populate and are still blank, click the red “x” to remove this payment type, go back to the “Remit-to” section, and add a new Bank Transfer payment method.

Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

[Add Remit-To](#)

Remittance/Payment Information

Payment Type ✕

Check

Check must be selected.

How would you like to be paid?

[All Methods](#) [Bank Transfers](#) [Checks](#) [Credit Cards](#)

[Add Payment Method](#) ▾

Bank Transfers

Checks

☆ Customer Supported

My Bank

123 Biz Street, Dallas, TX 75001, United States

Account Number: ****56789 Transit Code: 111000025 Wire Routing Number

Add Payment Method ✕

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * State * Bank Account Currency

United States ▾ ▾ USD ▾

Beneficiary Name Bank Name

10. Optionally, for **ACH Payment Types**, you can click **“File”** and upload a blank letter or voided check.

Banking Supporting Document

Attachments

Add [File](#)

 [coupa.jpg](#)

if you selected ACH/Wire for Payment Type, please attach a bank letter or voided check.

11. Select “Yes” or “No” to the question, “As a supplier will you be accessing ramp side of the FBO or Air Operations Area (AOA)?”

* As a supplier will you be accessing ramp side of the FBO or Air Operations Area (AOA)?

Yes

No

i **Tip:** If you select “Yes,” you will be prompted for your **General Liability Insurance** and **Auto Insurance**. For each document, provide the **start date, end date, and upload a copy**.

General Liability Insurance	Auto Insurance
<p>Effective Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">03/12/25 </div>	<p>Effective Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">03/10/25 </div>
<p>* Expiration Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">10/09/25 </div>	<p>* Expiration Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">11/18/25 </div>
<p>* Attachments</p> <p>Add File</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; background-color: #f0f0f0;">coupa.jpg</div>	<p>* Attachments</p> <p>Add File</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; background-color: #f0f0f0;">coupa.jpg</div>
<p> • can't be blank</p> <p>Description</p> <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>	<p> • can't be blank</p> <p>Description</p> <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>

12. Finally, click **Submit for Approval** at the bottom of the form.

Ramp Access
None

Insurance Provided
None

i Tip: You should see the message **Your information has been submitted** at the top.

Atlantic Aviation Profile Atlantic Aviation

Your information has been submitted

[View All Responses](#)

External Update Form_v03

Supplier onboarding form. Also used for updates post-onboarding.

i Tip: Track the update's status through the **Submitted** and **Approved** stages on home page.

coupa supplier portal JOHN | NOTIFICATIONS 3 | HELP

[Home](#) [Invoices](#) [Orders](#) [Business Profile](#) [Payments](#) [Setup](#) [Service Sheets](#) [ASN](#) [Sourcing](#) [More...](#)

SU Supplier123
Profile Last Updated: 2 days ago | [View Profile](#)

Recent Activity View *i*

Atlantic Aviation

Information Request	Approved Mar 12
Atlantic Aviation • Received yesterday	
Information Request	Submitted Mar 12
Atlantic Aviation • Received yesterday	
Information Request	Due Now Mar 11
Atlantic Aviation • Received 2 days ago	

Announcements

No Announcements

i Tip: You can withdraw an onboarding form before approval by opening it, scrolling to the bottom of the page, and clicking **“Withdraw.”**

Callback Complete?

Yes
 No

Hold POs for buyer review

No

Ramp Access

None

Insurance Provided

None

Payment Terms

Net 60

Withdraw

3. Making Changes to Your Data in Coupa

Section Overview: This section details how to use the Coupa Supplier Portal (CSP) to update Atlantic Aviation with changes to your contact, tax or payment information.

1. Navigate to your original External Update form by clicking **“Business Profile,”** then **“Information Requests,”** setting the view to **“All,”** and clicking **“External Update Form.”**

The screenshot displays the Coupa Supplier Portal interface for Atlantic Aviation. The top navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Setup', and 'Service Sheets'. The 'Business Profile' menu is expanded, showing 'Business Profile', 'Legal Entities', 'Information Requests', and 'Performance Evaluation'. A notification banner at the top right states: 'A form response is approved. The Supplier Information you submitted was approved by Atlantic Aviation. See All Notifications'. Below the navigation, the page title is 'Atlantic Aviation' and the profile name is 'Atlantic Aviation'. The main content area is titled 'Form Responses'. A table below shows a list of responses with columns for 'Form', 'Status', 'Created Date', and 'Submitted At'. The first row is 'External Update Form_v03' with a status of 'Applied', created on '03/10/25', and submitted on '03/11/25'. A 'View' dropdown menu is set to 'All'. The page footer indicates 'Per page 15 | 45 | 90'.

Form	Status	Created Date	Submitted At
External Update Form_v03	Applied	03/10/25	03/11/25

2. Scroll to the bottom of the form, below the **“Atlantic Aviation Use Only”** section, and click **“Update Info”** to make the form editable.

Atlantic Aviation Use Only

OFAC Result
None

Website Snip
None

Callback Complete?
 Yes
 No

Hold POs for buyer review
No

Ramp Access
None

Insurance Provided
None

Update Info
Chat with Co

3. Edit the form according to the instructions outlined in **Section 2**, then click Submit for Approval at the bottom of the page. Refer to **Section 2, Step 14** on monitoring the form status.

Hold POs for buyer review
No

Ramp Access
None

Insurance Provided
None

Decline
Save
Submit for Approval