Signing up for Coupa Supplier Portal & Updating Data (Supplier)

Quick Reference Guide (QRG)

Updated 10/31/2025

Contents

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:

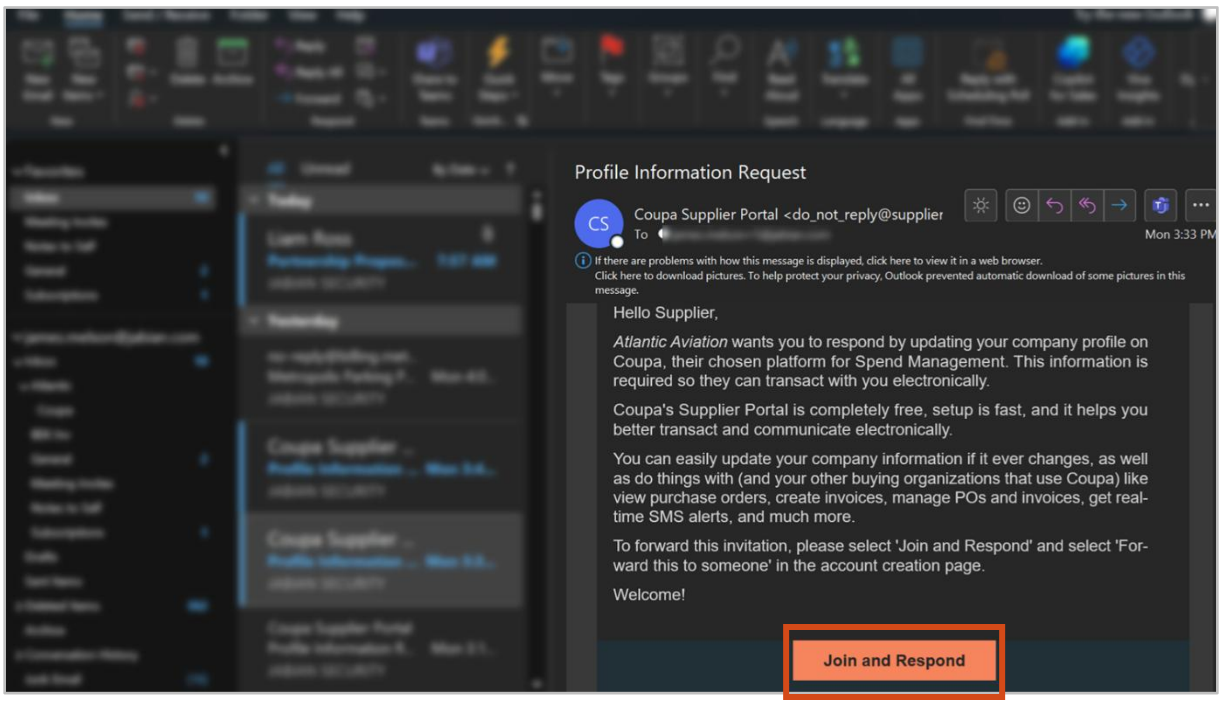
1. Creating an account on Coupa Supplier Portal (CSP)
2. Completing Atlantic Aviation Supplier Onboarding Forms (External Update Form)
3. Updating Your Data in the Coupa Supplier Portal (CSP)

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

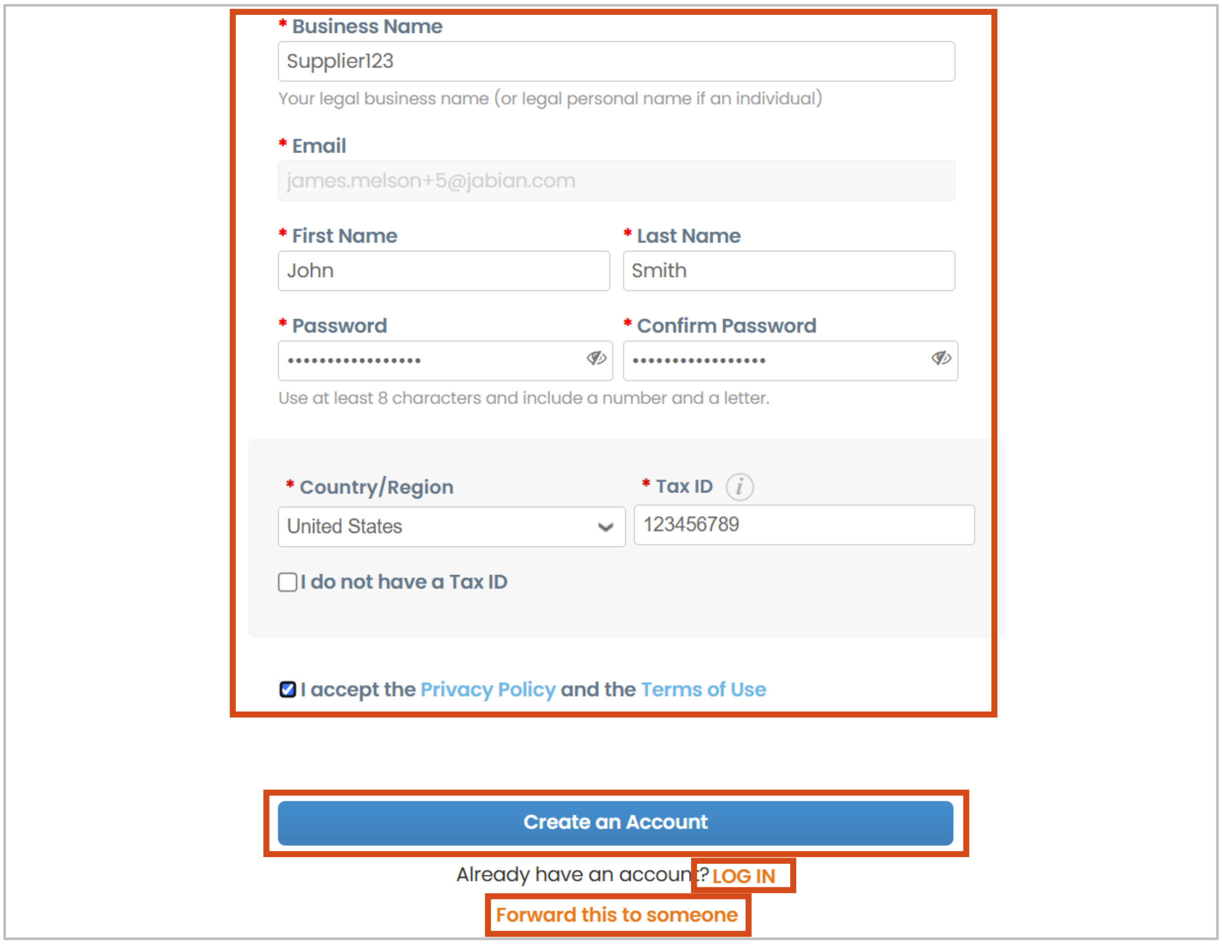
1. If you are requested to participate in the Supplier onboarding process with Atlantic Aviation, you will receive an email inviting you to create a company profile on Coupa – click **"Join and Respond."**



Tip: If you need this invitation to go to a different email, you should still click the button, and then you should click **"forward to someone else"** on the account creation page.

Tip: If already have a Coupa Supplier Portal account, you should still click the button, and then you can click **"Log In"** on the account creation page.

2. If you already have a CSP account, click LOG IN . If you need someone else to fill out this form, click Forward this to someone . Otherwise, complete **all fields** on this page then click Create an Account .



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

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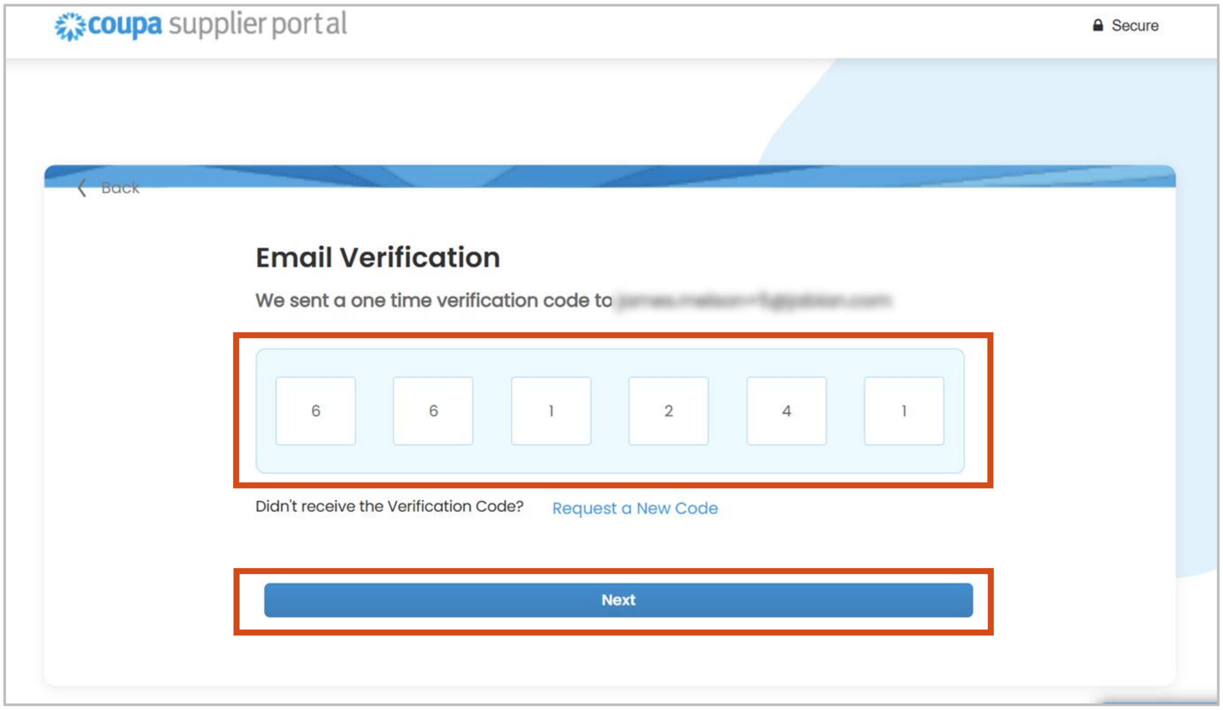
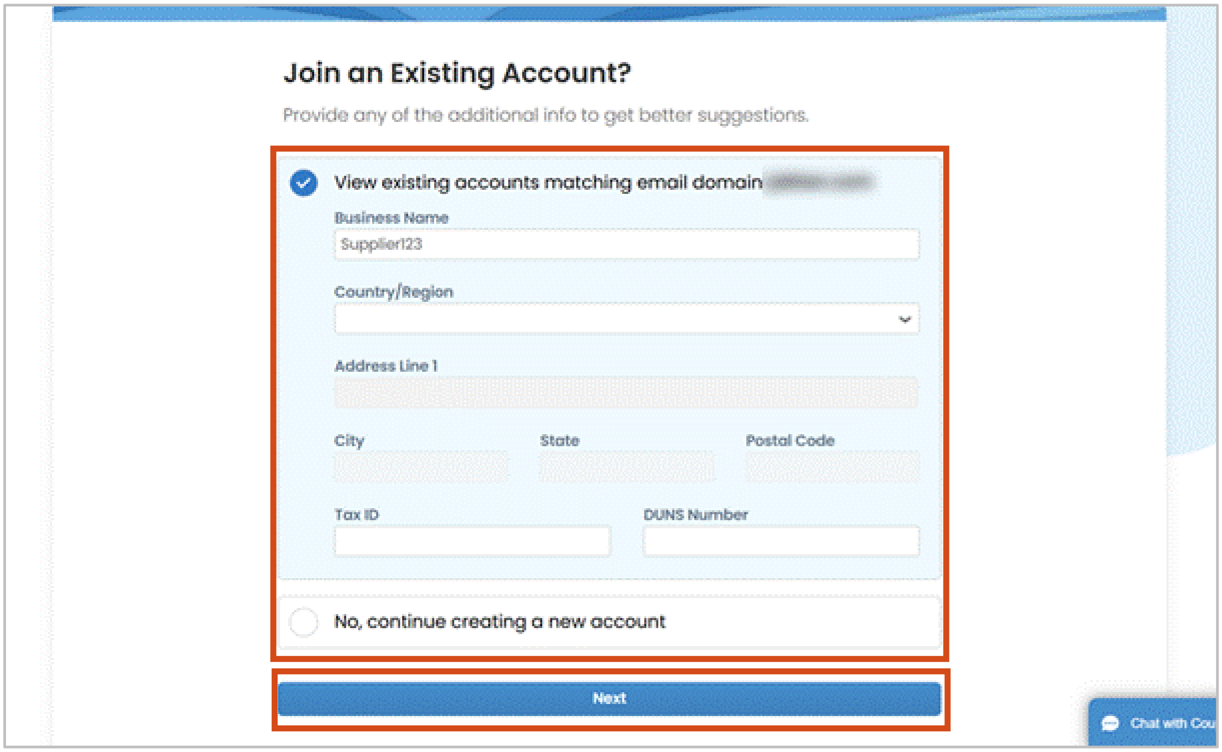
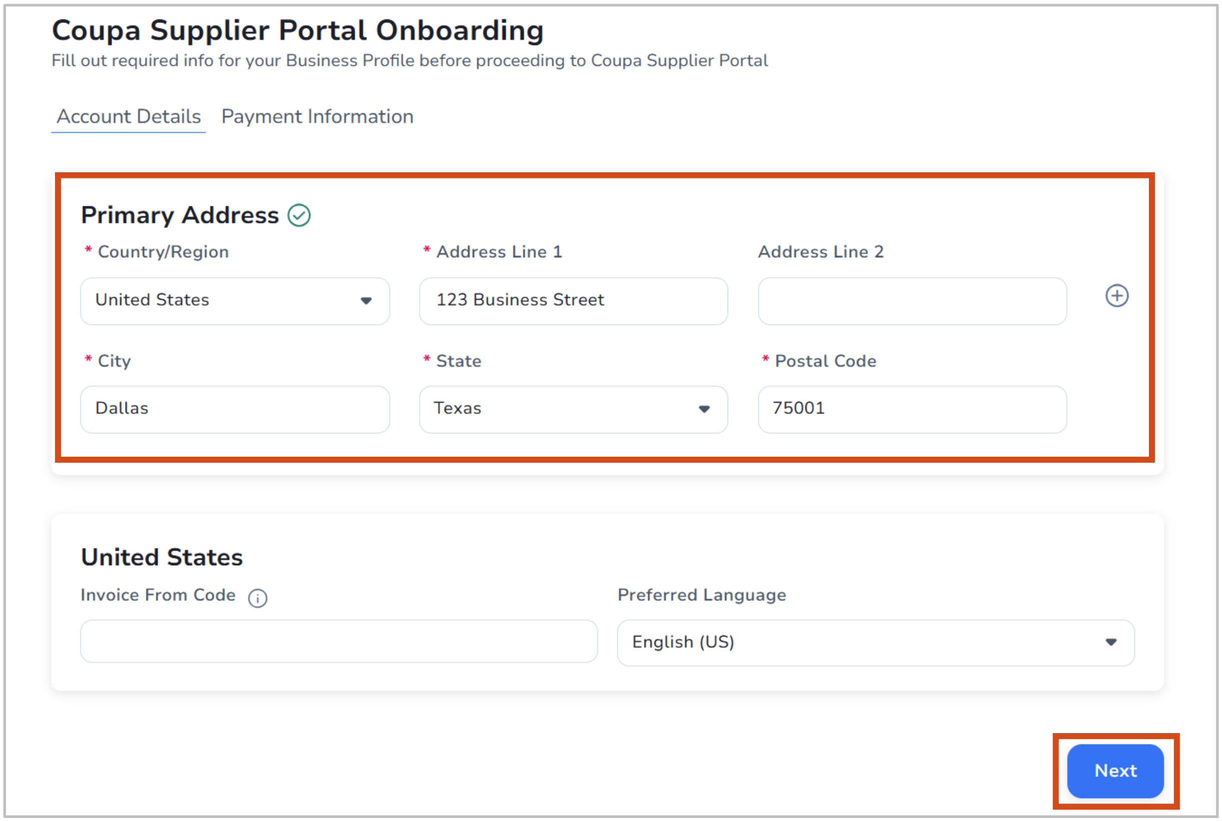


Tip: If your email domain is in use with an existing account(s), you will be asked if you want to join the associated account(s). Select **"View existing accounts…"** or **"No, continue creating a new account,"** then click Next .



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

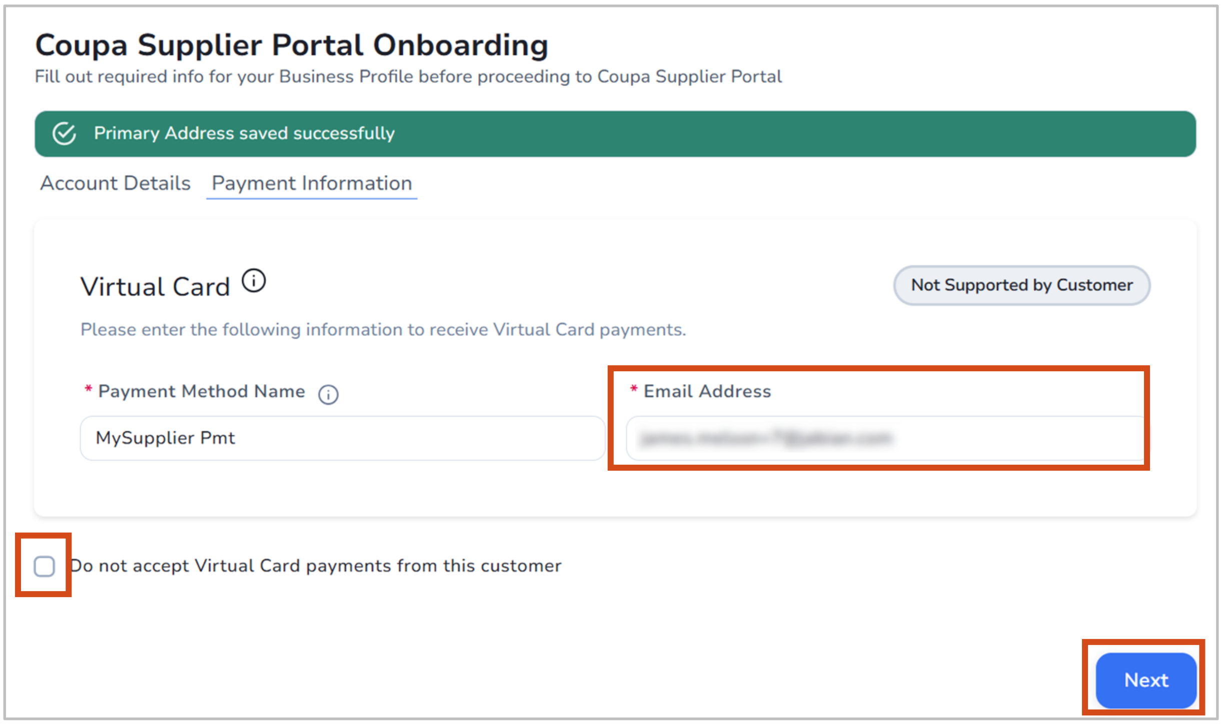


1.2 Completing Your Payment Information

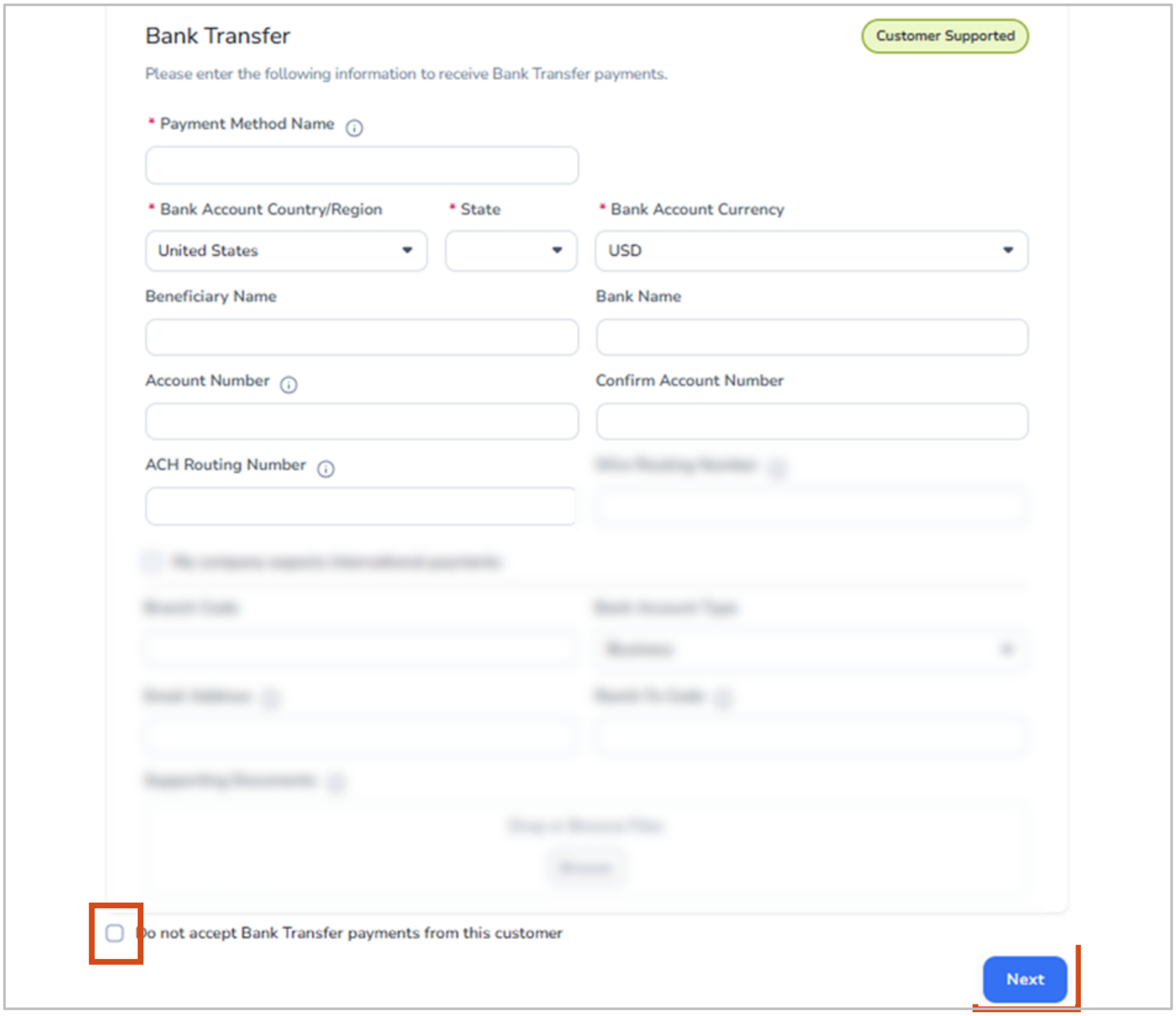
Atlantic Aviation allows only one payment method per supplier. Please select either **ACH**, **Check**, **OR Virtual Card** as your preferred payment method and fill out the necessary data. **Select "Do Not accept** *[payment method x]* **from this customer" for all other payment methods.**

Note: Selecting more than one option may result in payment delays.

1. **If virtual card is your preferred method of payment, complete the "Virtual Card" information** or check "do not accept virtual card payment from this customer."



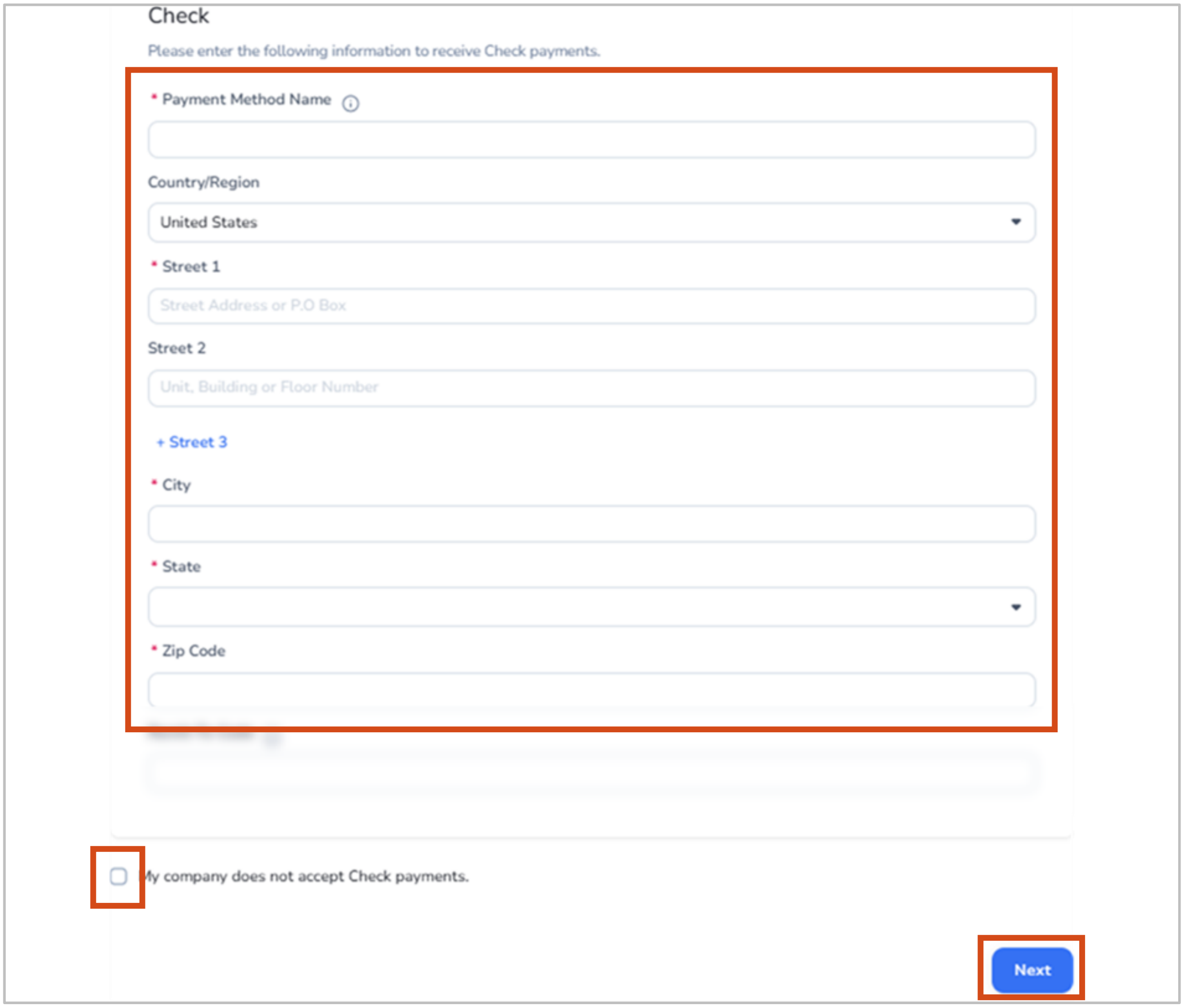
2. **If ACH bank payment is your preferred method of payment, complete the "Bank Transfer" information** or check "do not accept bank transfer payments from this customer."



- **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**

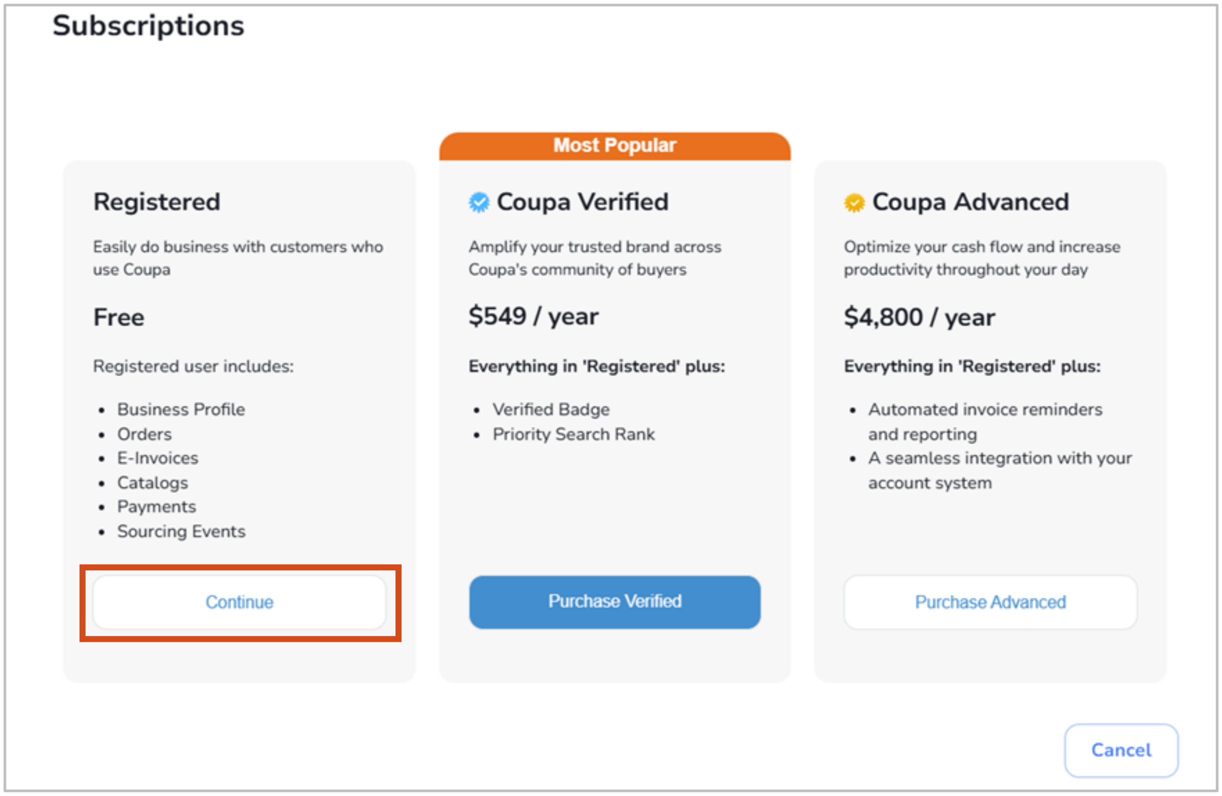
- **ACH Routing Number**

3. **If check is your preferred method of payment, complete the "Check" information** or check "do not accept check payment from this customer."



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

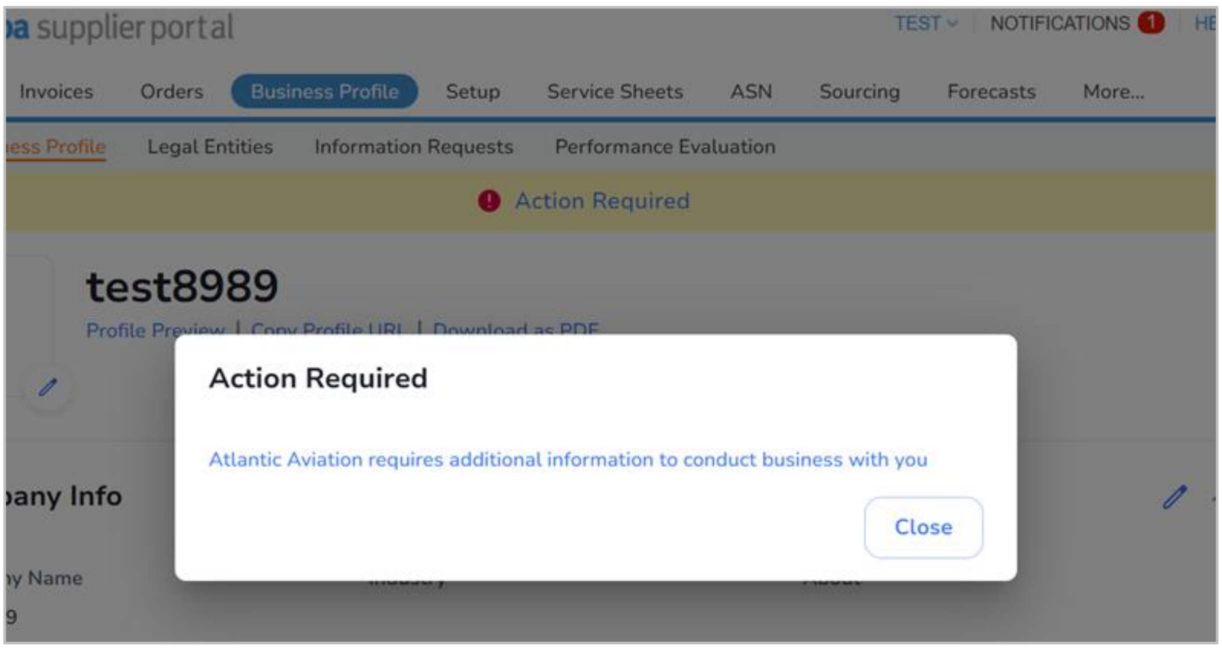
4. When this pop-up appears, click Continue to use the free version of Coupa.



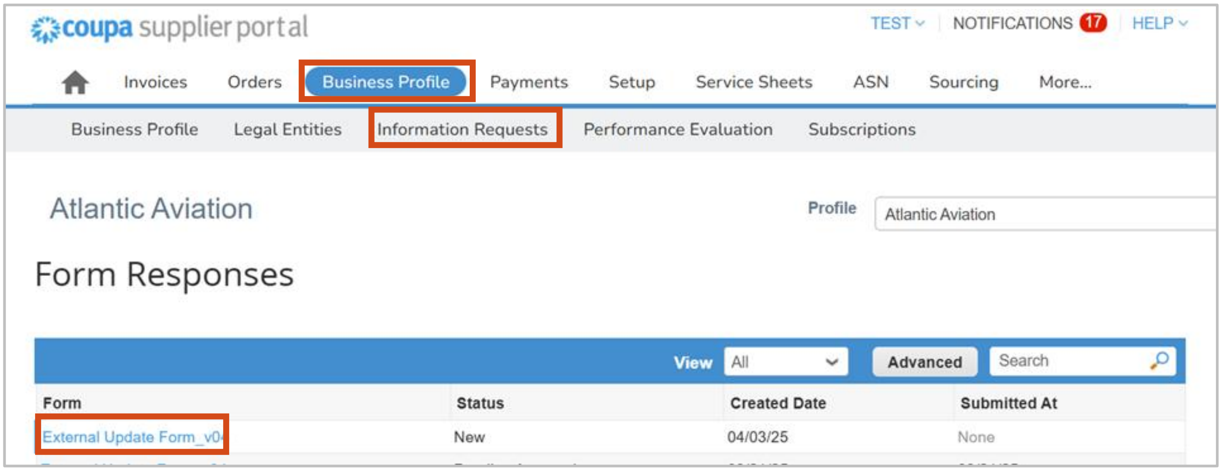
2. Completing Atlantic Aviation Onboarding Forms

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 to complete the onboarding process.** Click **"Business Profile"** then click **"Action Required,"** and then click on the dialog box that pops up. Then click **"External Update Form."**

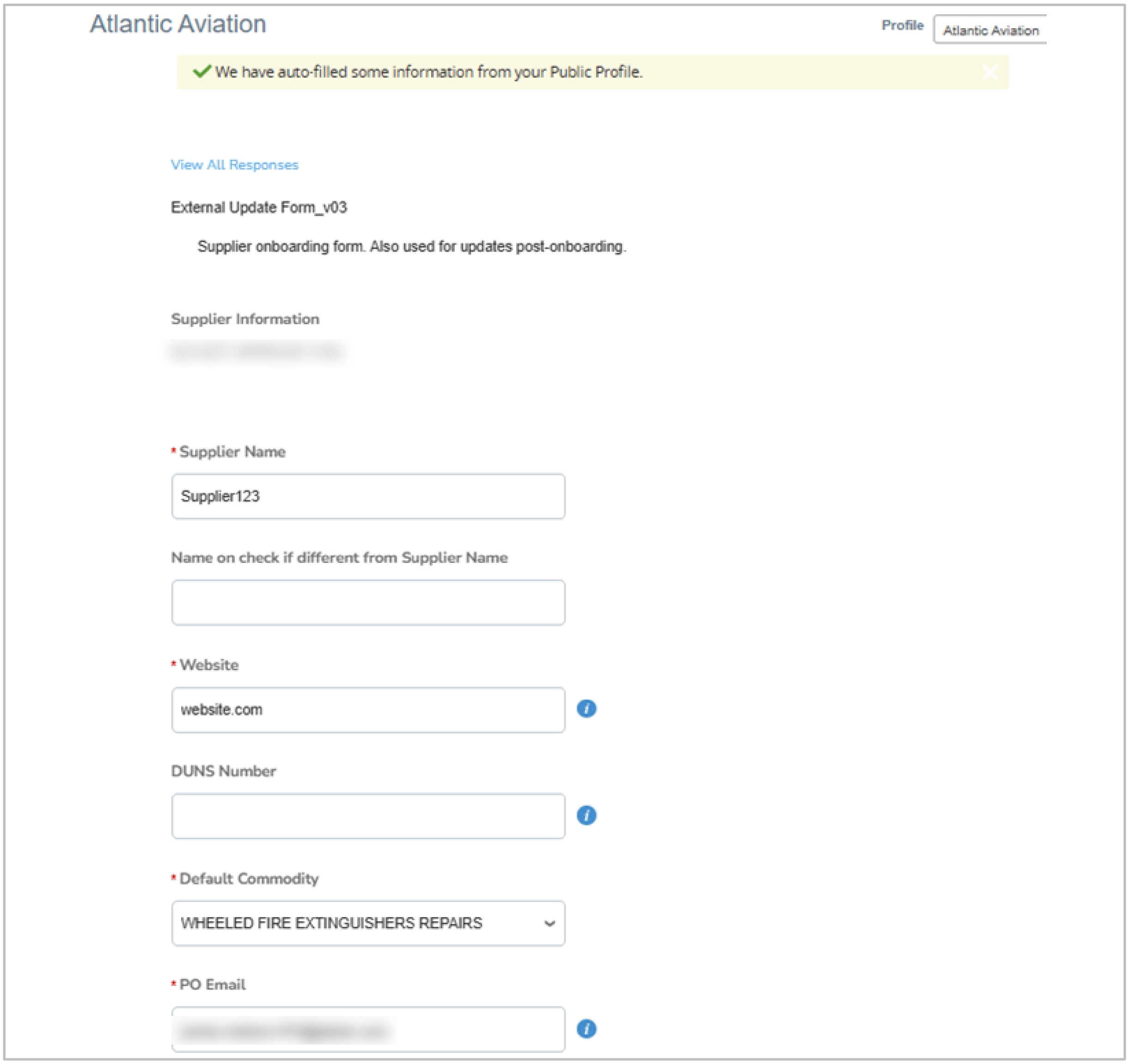


Tip: If you don't receive the **"Action Required"** message, click on **"Business Profile"** and **"Information Requests"** on your home screen.



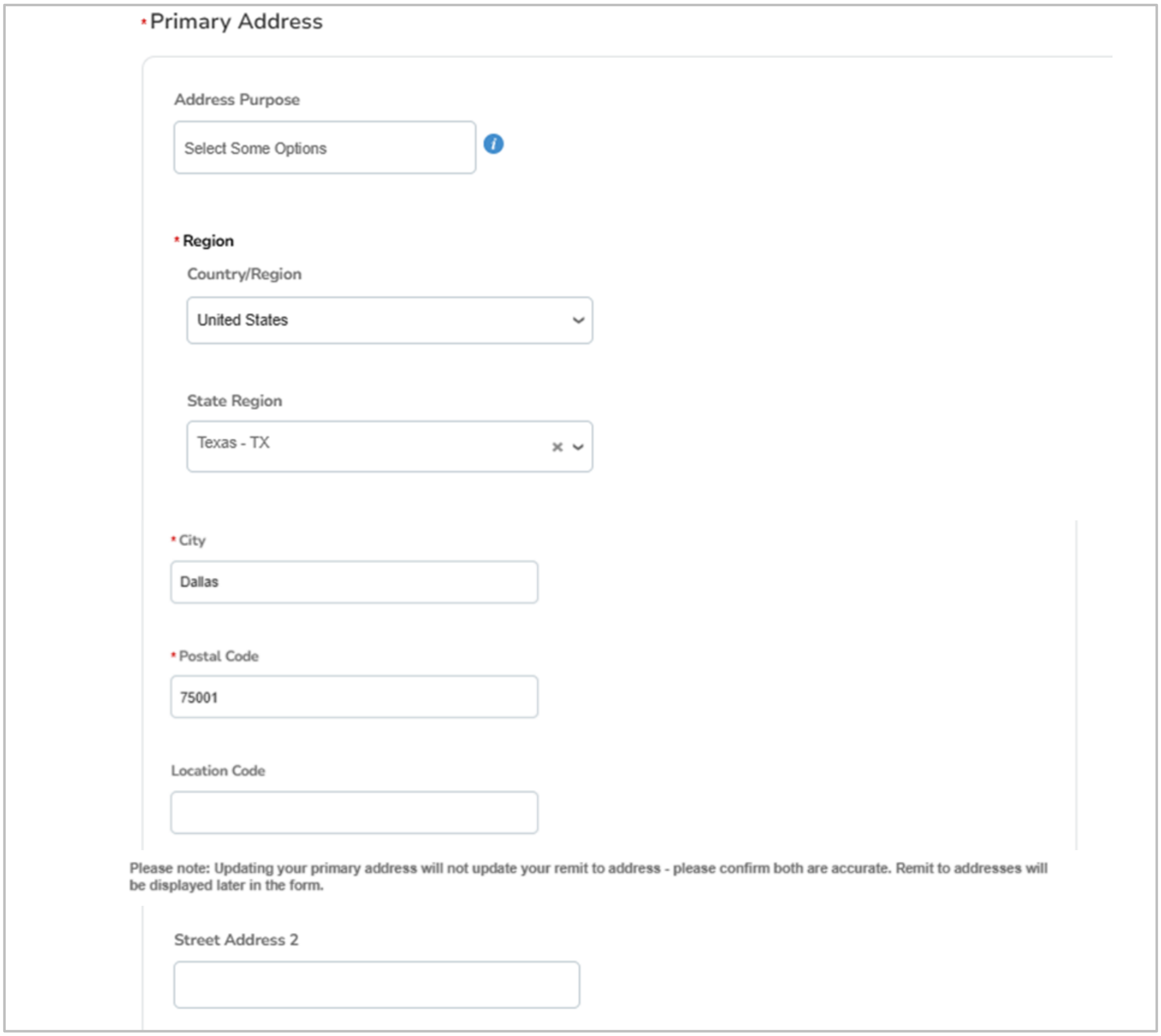
Tip: If you need to **update or change your account email address**, you need to email APNewVendor@atlanticaviation.com who will unlink your account and send a new invitation to the appropriate email. You also can add new users by navigating to Setup → Admin → Add Users.

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.**



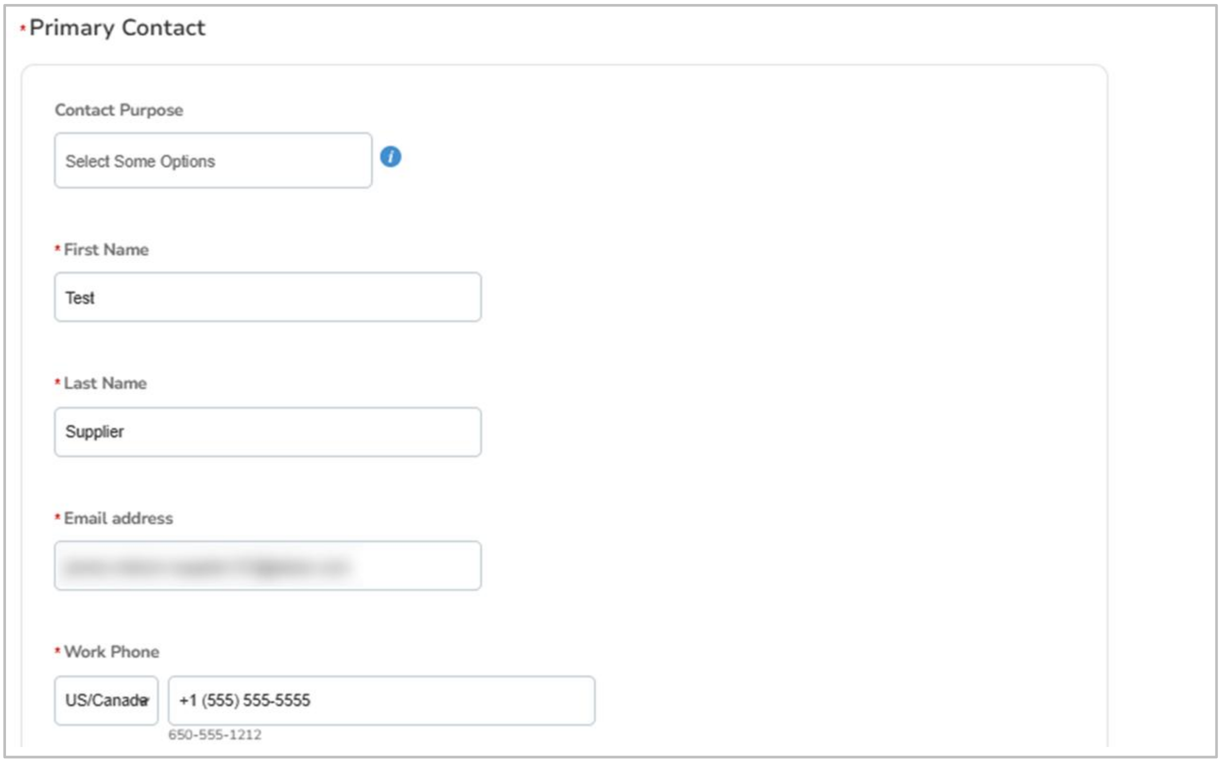
- **Supplier Name** – should be pre-populated
- **Website** – your company URL
- **Default Commodity** – should be pre-populated
- **PO Email** – email address to receive purchase orders from Atlantic

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



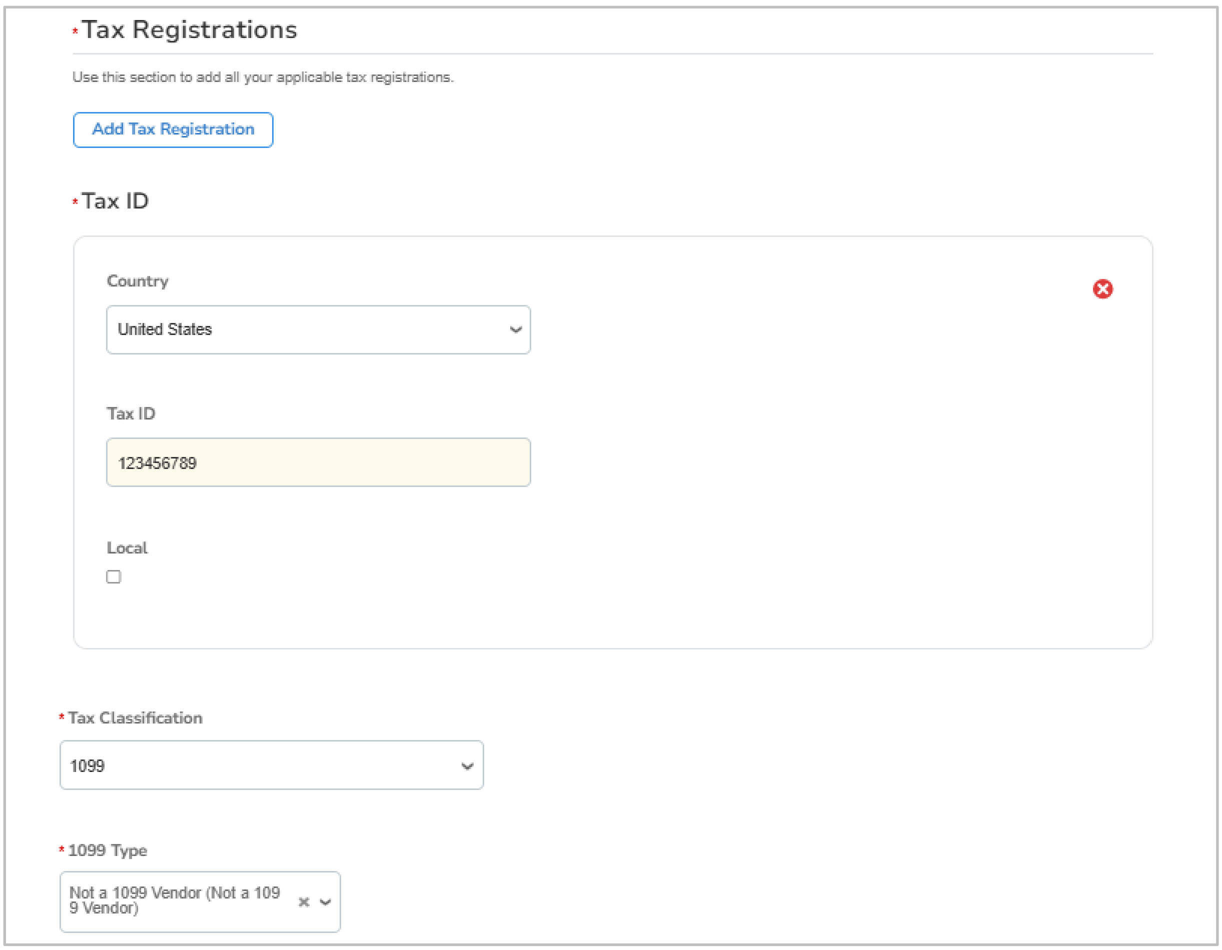
Tip: Note that updating this address information **will not update your remit-to address.**

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

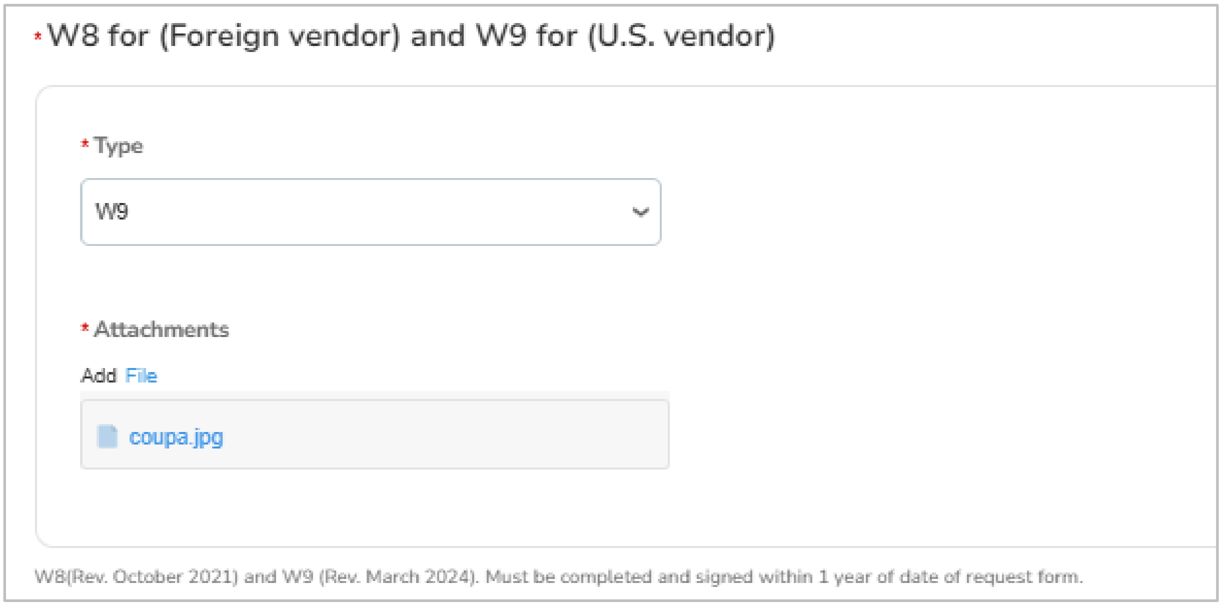


- **First & Last Name**
- **Email Address** – your work email
- **Work Phone –** enter digits only

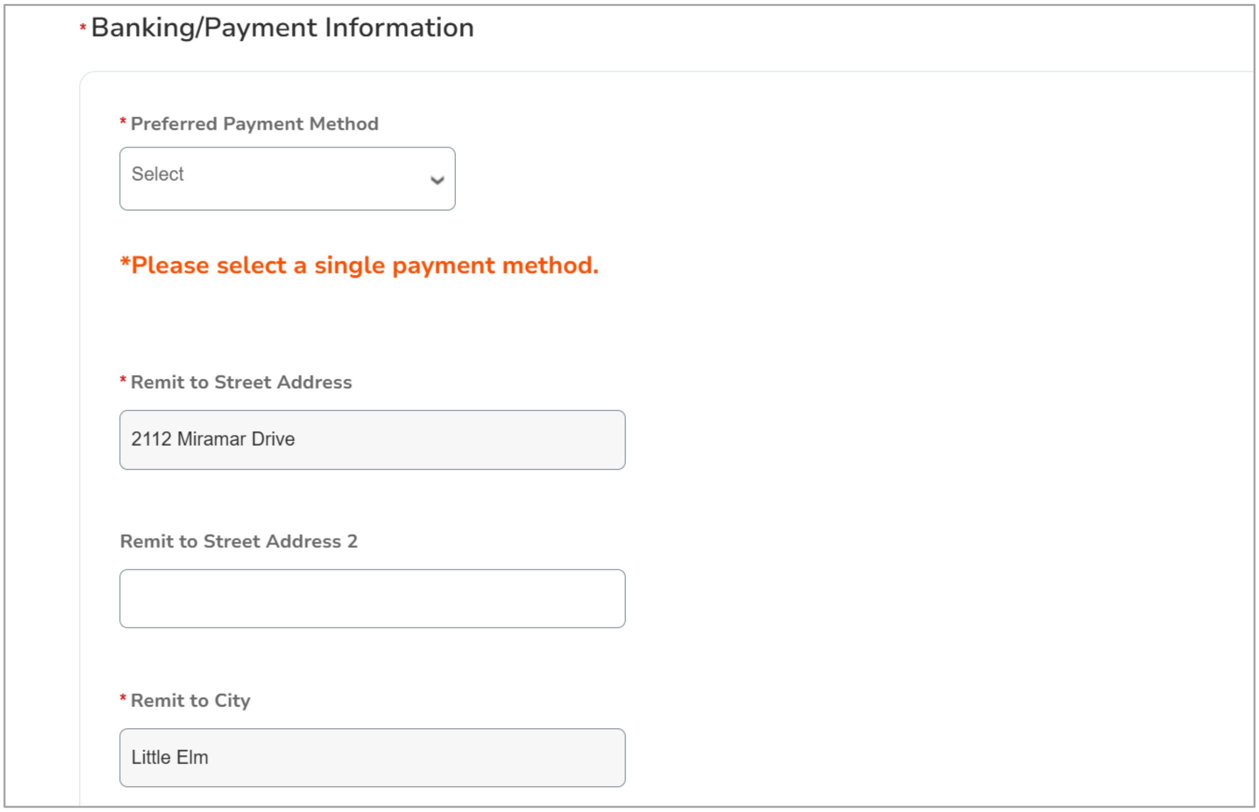
5. If this data does not automatically populate, click **“Add Tax Registrations” and fill out the following information**
    - **Country**
    - **Number** – tax ID number
    - **Tax Classification –** select from the drop-down
        - **Fill in any additional dropdowns that pop up from this step**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



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

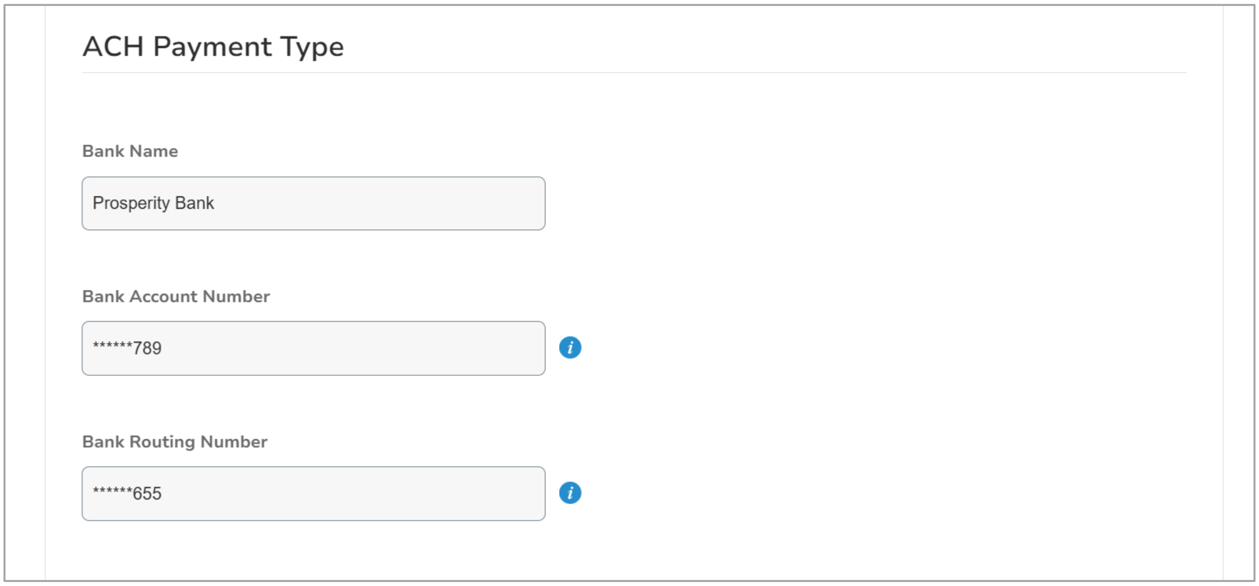


7. Select your **preferred payment type** (ACH, Virtual Card, or Check. Complete the **bank transfer** information or **Virtual Card** information only. Complete the fields called out below. **Note:** Wire is not an available payment method with Atlantic Aviation.



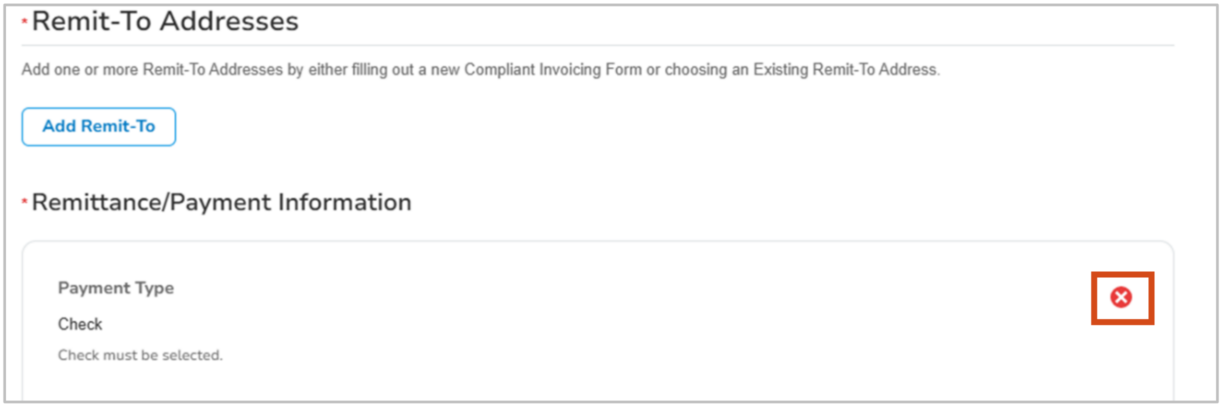
- **Remit-to Street Address** – should auto-populate
- **Remit-to City** – should auto-populate
- **Remit-to Country/Region** – should auto-populate
- **State Region** – should auto-populate
- **Remit-to Postal Code** – should auto-populate
- **Remit-to Contact Email** – email address for confirming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

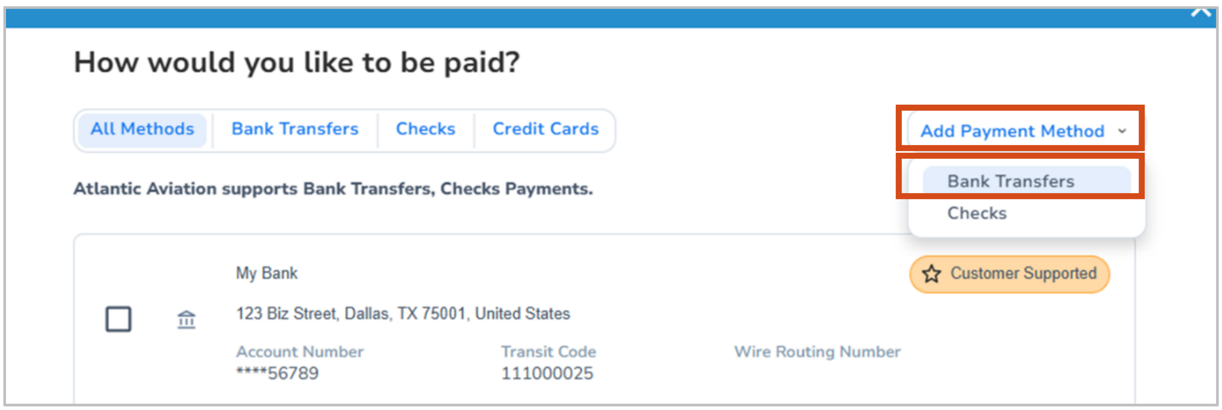
8. For **ACH Payment Types only**, details should automatically populate from the Coupa Global Onboarding forms. If they do not, enter the required information in the following fields:

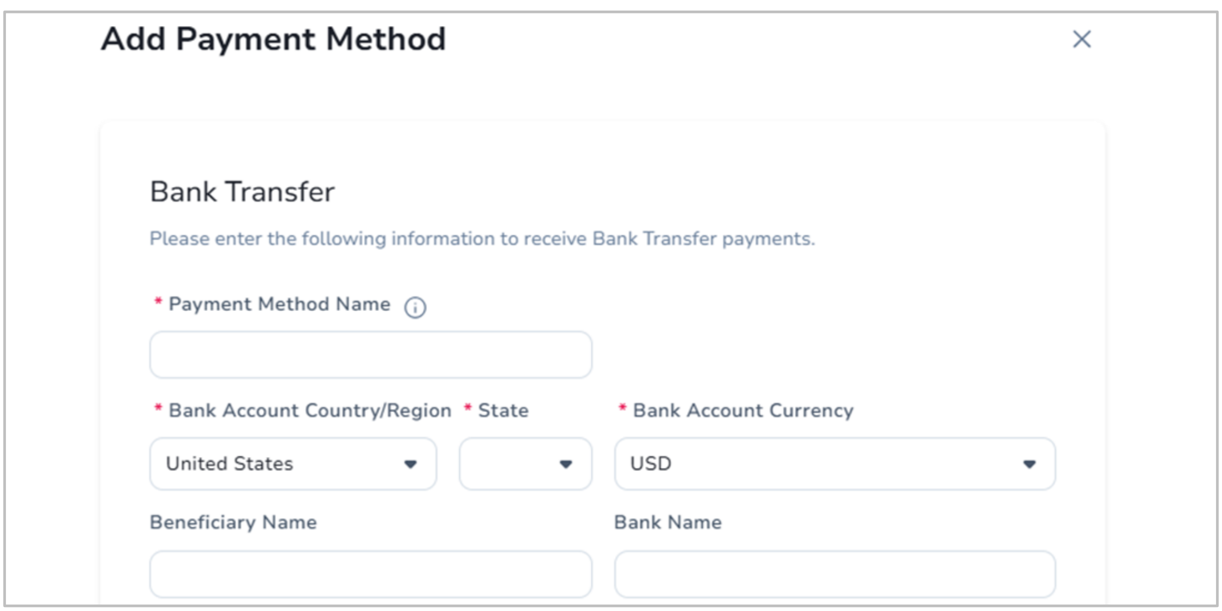


- **Bank Address**
- **Bank City**
- **Bank Postal Code**

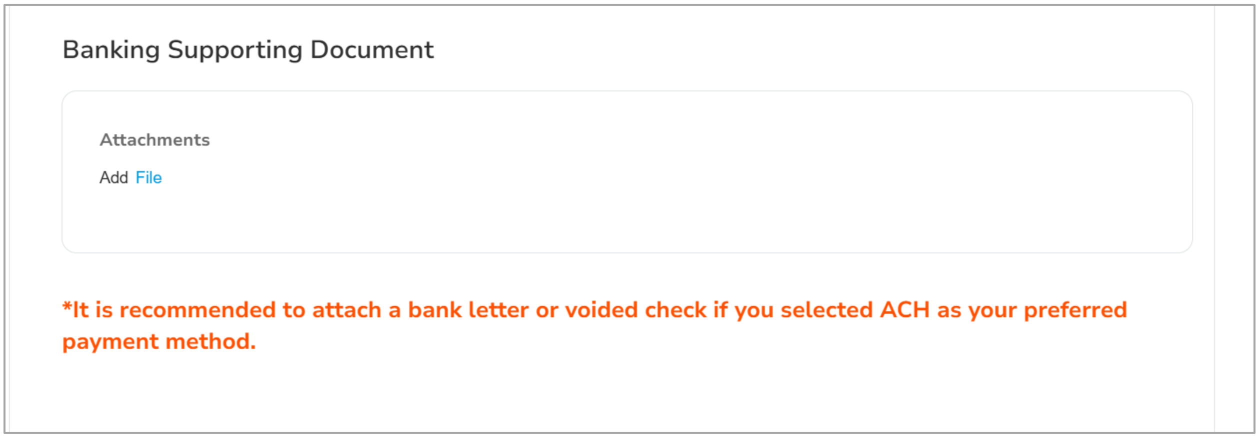
Tip: If **"Bank Name,"** "**Bank Account Number,"** and/or **"Bank Routing Number"** do not auto-populate and are still blank, click the red "x" to remove this payment type, go back to the "Remit-to" section, and add a new Bank Transfer payment method.



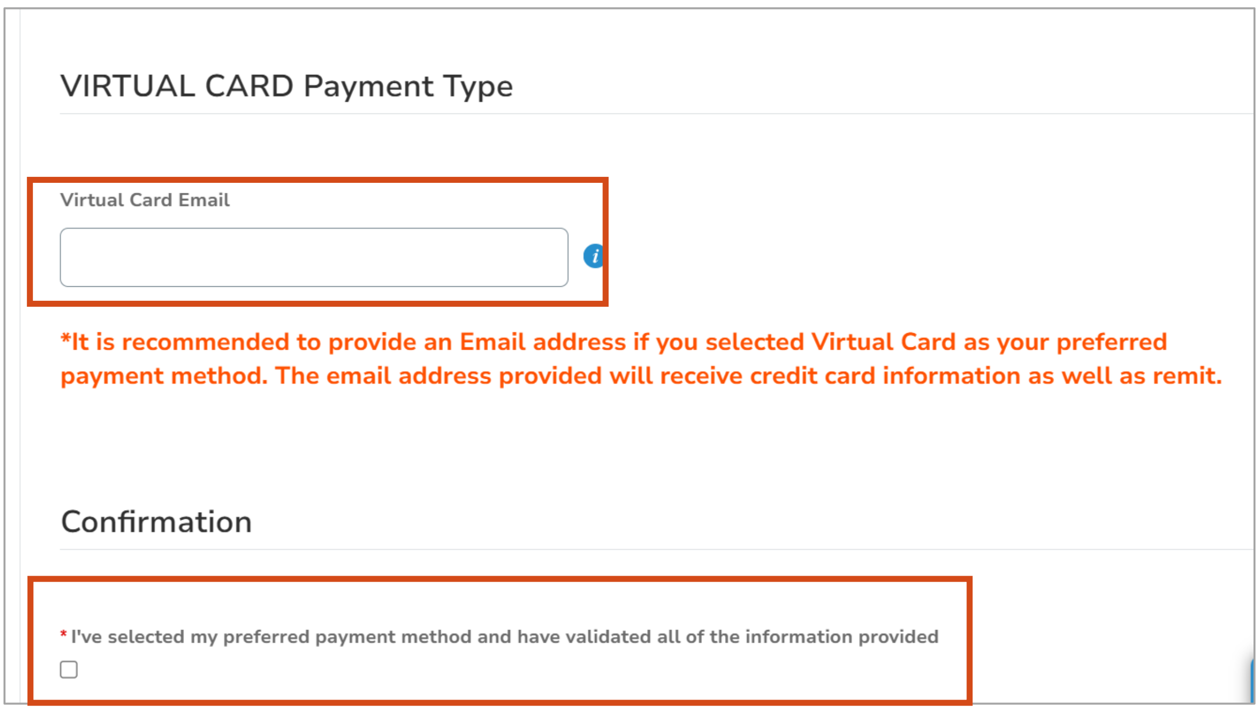




Tip: For **ACH Payment Types**, add supporting documentation by clicking File.



11. For **Virtual Card Payment Types** only, fill out the Virtual Card Email. Then select the check box to confirm that you have selected the correct payment method.



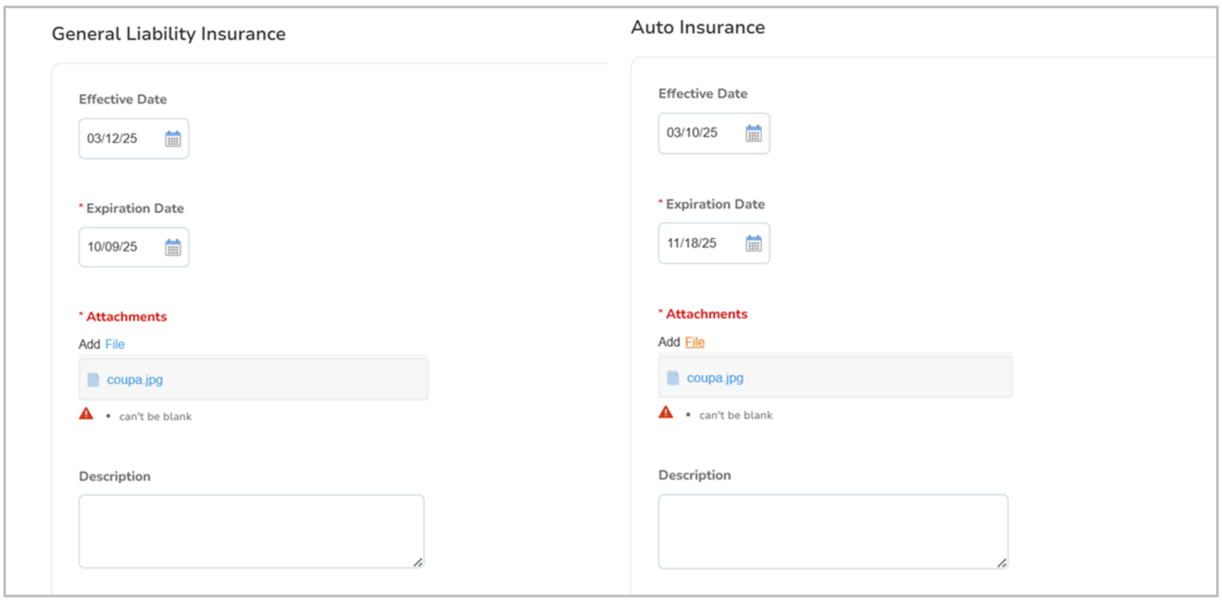
12. Select **"Yes"** or **"No"** to the question, **"As a supplier will you be accessing ramp side of the FBO or Air Operations Area (AOA)?"**


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

Yes

No

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

Effective Date

03/12/25

* Expiration Date

10/09/25

* Attachments

Add File

coupa.jpg

• can't be blank

Description

Auto Insurance

Effective Date

03/10/25

* Expiration Date

11/18/25

* Attachments

Add File

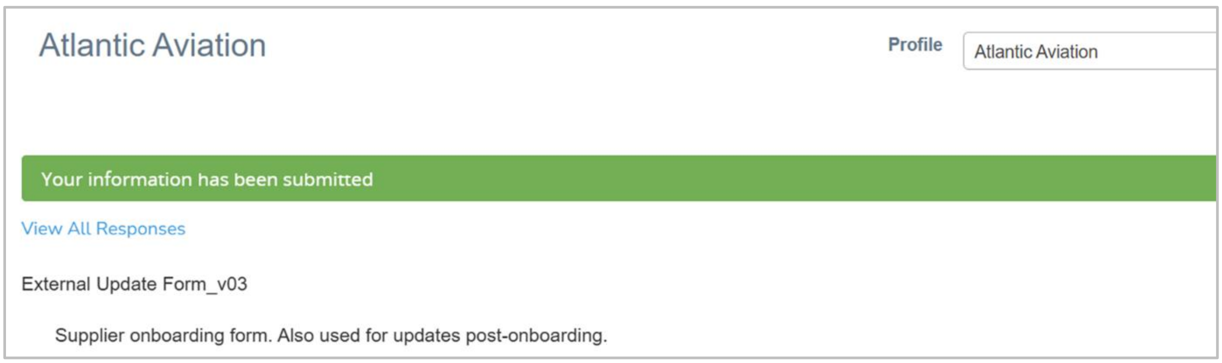
coupa.jpg

• can't be blank

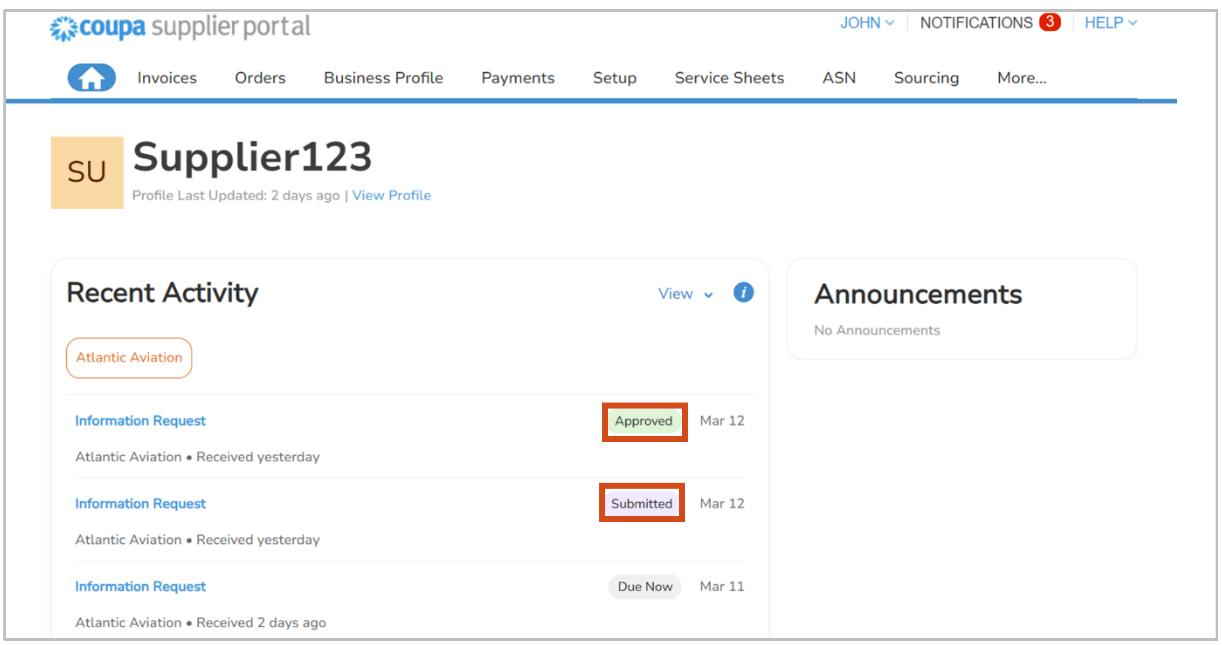
Description

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

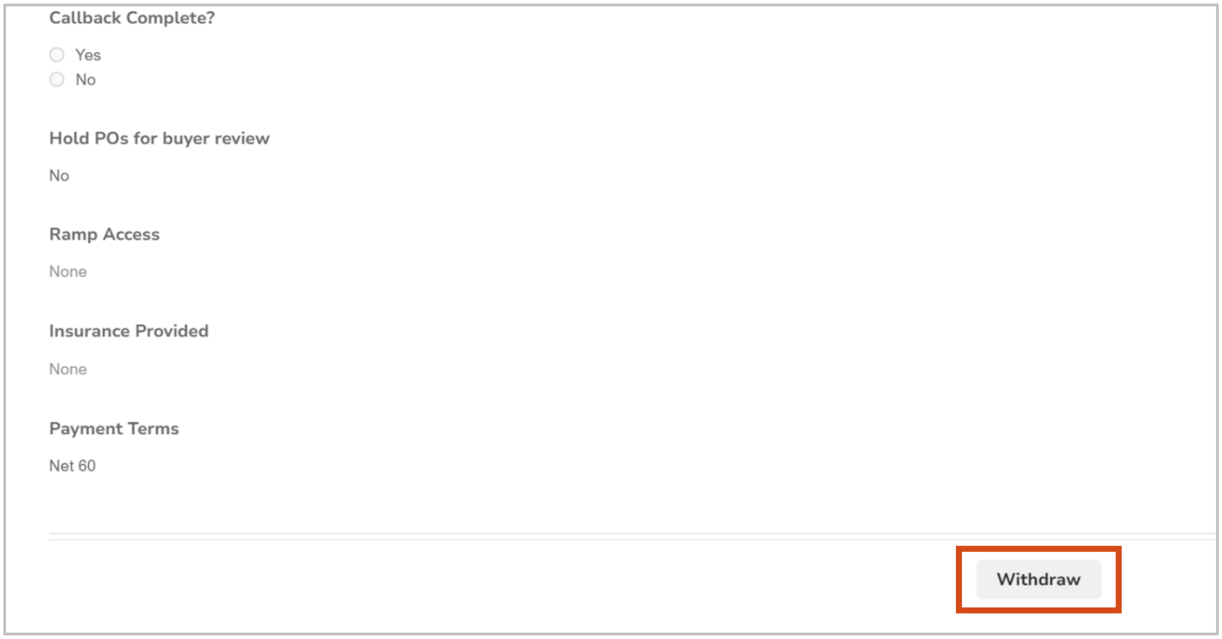
Tip: You should see the message "Your information has been submitted" at the top.



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



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



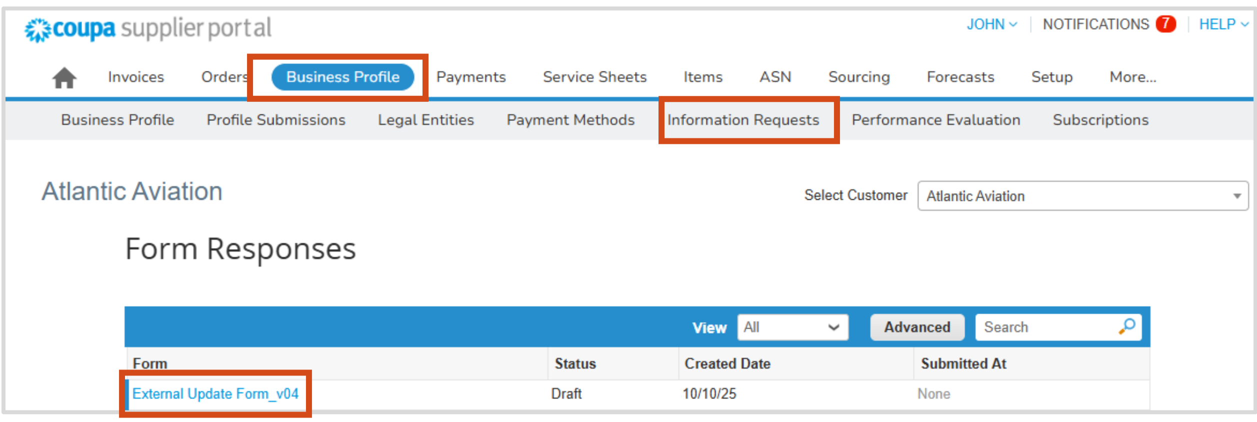
3. Making Changes to Your Data in Coupa

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.

3.1 Updating Business Data with Atlantic Aviation

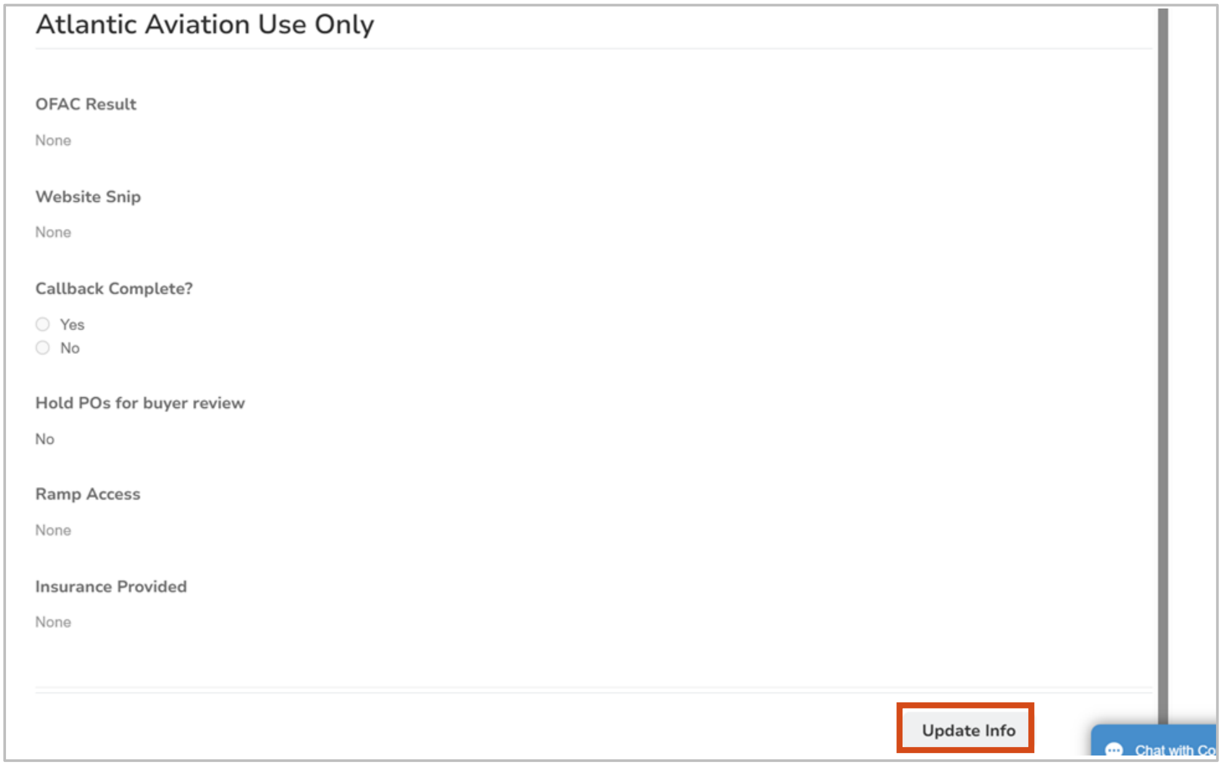
Tip: If you need to update your business data with Atlantic Aviation, **you must update your information on the External Update Form**. Any updates to Global Business Profile will not transfer to Atlantic Aviation.

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."**



Tip: If you need to **update or change your account email address**, you need to email APNewVendor@atlanticaviation.com who will unlink your account and send a new invitation to the appropriate email.

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



3. Edit the form according to the instructions outlined in **Section 2**, then click at the bottom of the page. Refer to **Section 2, Step 13** on monitoring the form status.