

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?	3
1. Registering for the Coupa Supplier Portal (CSP)	4
1.1 Creating a Profile with Contact Information	4
1.2 Completing Your Payment Information	9
2. Completing Atlantic Aviation Onboarding Forms	13
3. Making Changes to Your Data in Coupa	27
3.1 Updating Business Data with Atlantic Aviation	27

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:

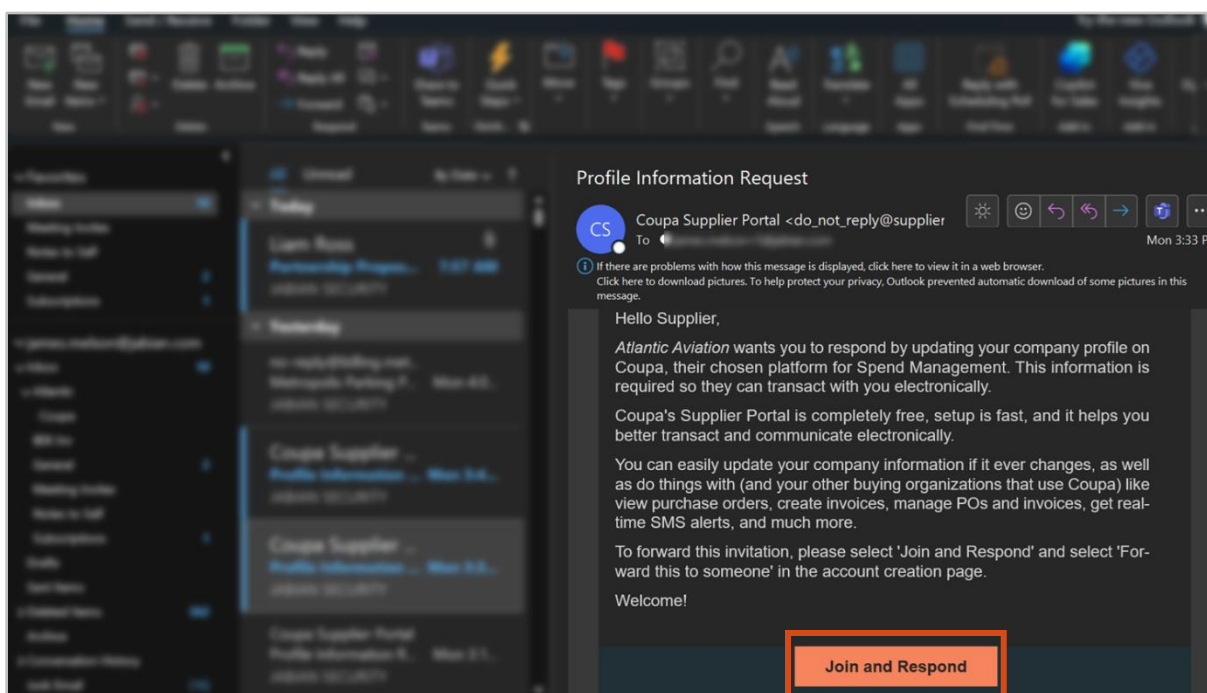
1. Creating an account on Coupa Supplier Portal (CSP)
2. Completing Atlantic Aviation Supplier Onboarding Forms (External Update Form)
3. Updating Your Data in the Coupa Supplier Portal (CSP)

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.”**



- i 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.
- i 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

* 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](#)

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

Next

coupa supplier portal Secure

[Back](#)

Email Verification

We sent a one time verification code to [redacted email address]

6	6	1	2	4	1
---	---	---	---	---	---

Didn't receive the Verification Code? [Request a New Code](#)

[Next](#)

- 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 Next .

The screenshot shows a web form titled "Join an Existing Account?". Below the title is a subtitle: "Provide any of the additional info to get better suggestions." The form contains two radio button options. The first option, "View existing accounts matching email domain", is selected (indicated by a blue checkmark in the radio button) and is enclosed in a red rectangular box. Below this option are several input fields: "Business Name" (containing "Supplier123"), "Country/Region" (a dropdown menu), "Address Line 1" (a text area), "City", "State", and "Postal Code" (each a text field), "Tax ID" (a text field), and "DUNS Number" (a text field). The second option, "No, continue creating a new account", is unselected. Below the radio buttons is a blue "Next" button, which is also enclosed in a red rectangular box. In the bottom right corner of the form area, there is a small blue button labeled "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

United States ▼

* Address Line 1

123 Business Street

Address Line 2



* City

Dallas

* State

Texas ▼

* Postal Code

75001

United States

Invoice From Code ⓘ

Preferred Language

English (US) ▼

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.”

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 ⓘ

Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ
MySupplier Pmt

* Email Address
[Redacted]

Not Supported by Customer

☐ Do not accept Virtual Card payments from this customer

Next

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.”

Bank Transfer

Customer Supported

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

Account Number ⓘ Confirm Account Number

ACH 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. If check is your preferred method of payment, complete the “Check” information or check “do not accept check payment from this customer.”

Check

Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region

United States ▼

* Street 1

Street Address or P.O. Box

Street 2

Unit, Building or Floor Number

+ 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 [Continue](#) to use the free version of Coupa.

Subscriptions

Registered

Easily do business with customers who use Coupa

Free

Registered user includes:

- Business Profile
- Orders
- E-Invoices
- Catalogs
- Payments
- Sourcing Events

[Continue](#)

Most Popular

Coupa Verified

Amplify your trusted brand across Coupa's community of buyers

\$549 / year

Everything in 'Registered' plus:

- Verified Badge
- Priority Search Rank

[Purchase Verified](#)

Coupa Advanced

Optimize your cash flow and increase productivity throughout your day

\$4,800 / year

Everything in 'Registered' plus:

- Automated invoice reminders and reporting
- A seamless integration with your account system

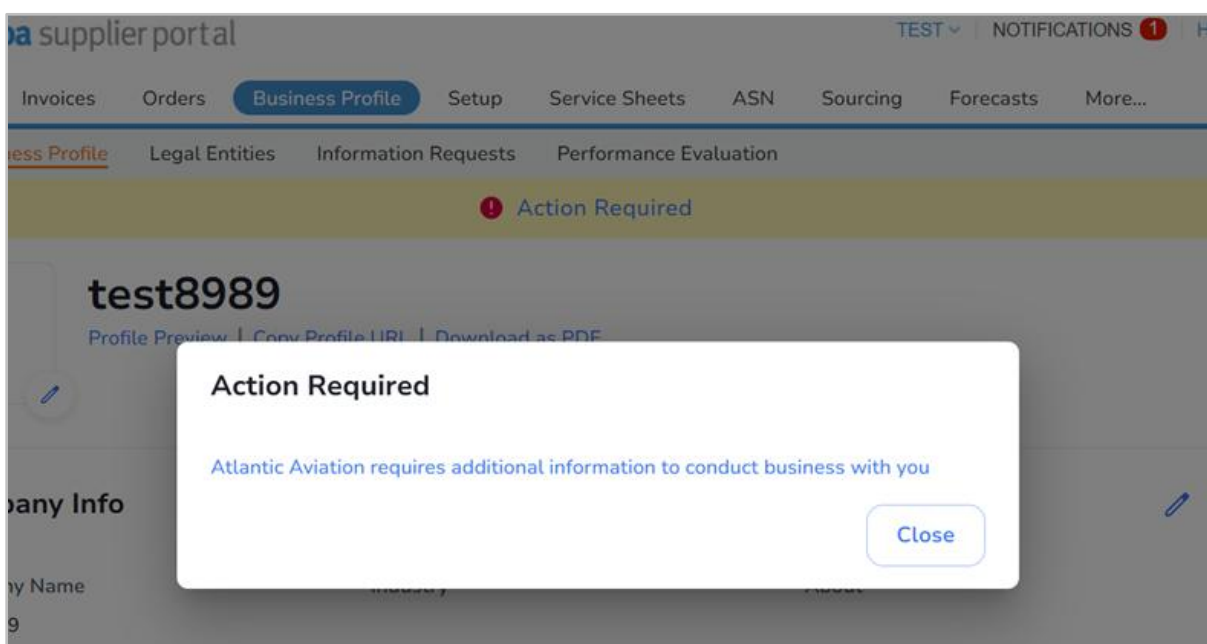
[Purchase Advanced](#)

[Cancel](#)

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.”**



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

The screenshot shows the Coupa Supplier Portal interface for Atlantic Aviation. The top navigation bar includes links for Invoices, Orders, Business Profile, Payments, Setup, Service Sheets, ASN, Sourcing, and More... The 'Business Profile' and 'Information Requests' links are highlighted with red boxes. Below the navigation bar, the 'Form Responses' section displays a table with the following data:

Form	Status	Created Date	Submitted At
External Update Form_v01	New	04/03/25	None

i 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**.

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

Supplier123

Name on check if different from Supplier Name

* Website

website.com i

DUNS Number

i

* Default Commodity

WHEELED FIRE EXTINGUISHERS REPAIRS ▼

* PO Email

i

- **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.

•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 

• First Name

Test

• Last Name

Supplier

• Email address



• 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 dropdowns 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.

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.

***Banking/Payment Information**

*** Preferred Payment Method**

Select ▼

***Please select a single payment method.**

*** Remit to Street Address**

2112 Miramar Drive

Remit to Street Address 2

*** Remit to City**

Little Elm

- **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:

ACH Payment Type

Bank Name

Prosperity Bank

Bank Account Number

*****789 

Bank Routing Number

*****655 

- **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](#)

Atlantic Aviation supports Bank Transfers, Checks Payments.



My Bank

123 Biz Street, Dallas, TX 75001, United States

Account Number

****56789

Transit Code

111000025

Wire Routing Number

[Add Payment Method](#)

Bank Transfers

Checks

☆ Customer Supported

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

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

Banking Supporting Document

Attachments

Add [File](#)

***It is recommended to attach a bank letter or voided check if you selected ACH as your preferred payment method.**

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.

VIRTUAL CARD Payment Type

Virtual Card Email

[i](#)

***It is recommended to provide an Email address if you selected Virtual Card as your preferred payment method. The email address provided will receive credit card information as well as remit.**

Confirmation

☐ ***I've selected my preferred payment method and have validated all of the information provided**

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

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
Effective Date 03/12/25 	Effective Date 03/10/25 
* Expiration Date 10/09/25 	* Expiration Date 11/18/25 
* Attachments Add File  coupa.jpg  * can't be blank	* Attachments Add File  coupa.jpg  * can't be blank
Description	Description

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

Ramp Access
None

Insurance Provided
None

Decline Save **Submit for Approval**

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

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

Announcements
No Announcements

 **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.

3.1 Updating Business Data with Atlantic Aviation

i 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.”**

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Invoices, Orders, **Business Profile** (highlighted with a red box), Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Setup, and More... Below this, a secondary navigation bar shows Business Profile, Profile Submissions, Legal Entities, Payment Methods, **Information Requests** (highlighted with a red box), Performance Evaluation, and Subscriptions. The main content area is titled 'Atlantic Aviation' and includes a 'Select Customer' dropdown menu set to 'Atlantic Aviation'. Below this, the 'Form Responses' section displays a table with columns: Form, Status, Created Date, and Submitted At. The first row in the table shows 'External Update Form_v04' (highlighted with a red box), Draft, 10/10/25, and None. Above the table, there are filters for 'View' (set to 'All') and 'Advanced' search options.

i 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.

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 at the bottom of the page. Refer to **Section 2, Step 13** on monitoring the form status.