



Help at Home®
Care to Live Your Life.

Reference Guide to Coupa

Training – HAH Supplier

Version 1.0

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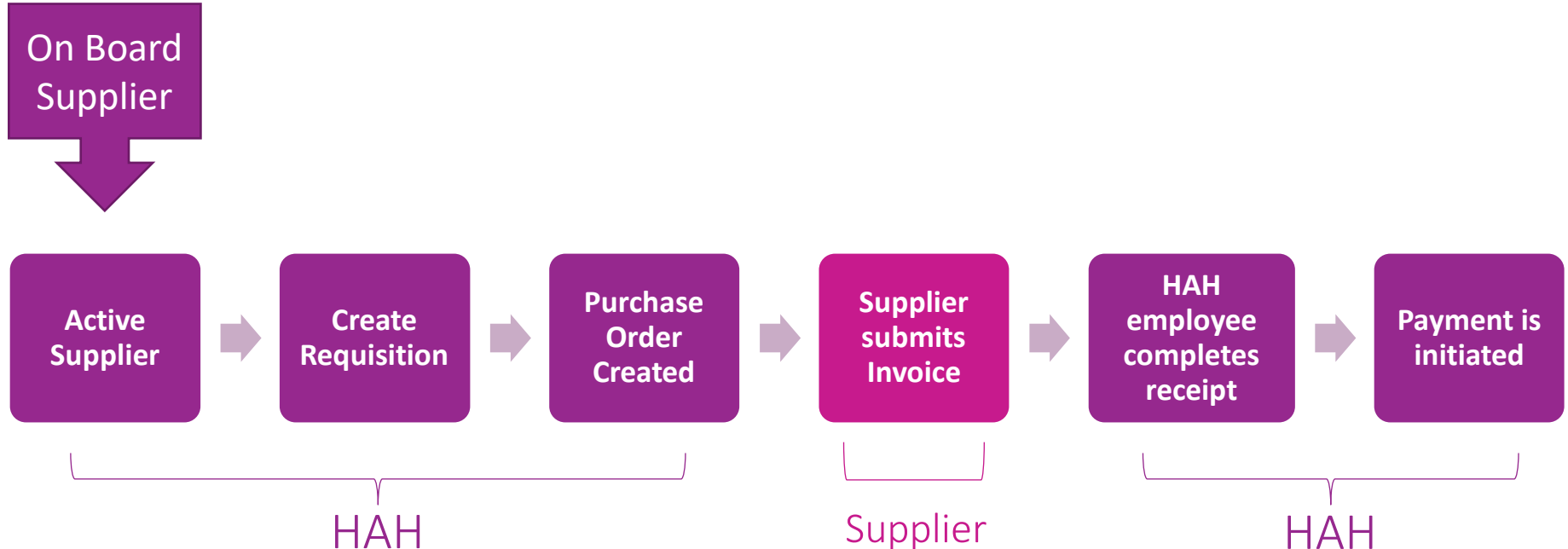
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Overview & Getting Started

Coupa

Understanding Coupa

- HAH utilizes Coupa as their AP Procurement/Procure-to-Pay tool
 - This means HAH employees use Coupa to place orders for product and services, then pay those suppliers with an automated process
- High Level Process Map of Coupa:



Becoming an Active Supplier

Partner with HAH

Becoming an Active Supplier

Internal Process (Help At Home's responsibility):

- The HAH Employee that you have worked with for purchasing will initiate the onboarding process internally
- Once this internal request has been reviewed and approved, an invite to join Coupa will be emailed to the Supplier's primary contact provided by the HAH Employee

External Process (Supplier's responsibility):

- Complete the emailed invite (utilizing the steps in this guide)
- If requested, answer any additional questions from HAH
- Await confirmation email with subject, "Requested Supplier: **CompanyName** is now Active"

Note:

- ❖ Coupa is free to you as the supplier

Documents Required for Onboarding

Preparation

What is required prior to joining Coupa?

Before you set up your Coupa Supplier Portal account, have the below documents ready to attach, when prompted.

1. Signed Master Service Agreement (MSA) or Contract
 - If not, upload a blank document stating “No MSA”
2. Completed Form W-9
 - Form Name: Request for Taxpayer Identification Number and Certification
 - Go to www.irs.gov/FormW9 for instructions and the latest information
3. Bank Verification document
 - Document types accepted
 - Voided Check
 - **OR**
 - Official Letter from Bank confirming:
 - Account Holder Name
 - Account Number
 - Routing Number

Note:

- ❖ Utilizing a Desktop/Laptop is preferred
- ❖ Supported web browsers (latest version):
 - ❖ Google Chrome
 - ❖ Mozilla Firefox
 - ❖ Microsoft Edge

Supplier Onboarding

Joining Coupa

Supplier Onboarding

Step 1:

The Supplier's primary contact will receive an invite from:

Coupa Supplier Portal
do_not_reply@supplier.coupahost.com

Note:

- ❖ This may arrive in your Junk/Spam folder

Step 2:

Select "Join and Respond"

Powered by **coupa**

Help at Home.
Care to Live Your Life

Help at Home Profile Information Request - Action Required

Hello New Help at Home Supplier,
Welcome!

We're excited to work with you! Help at Home utilizes **Coupa** to process invoices and payments electronically.

Coupa's Supplier Portal is free, easy to set up, and helps you better transact and communicate with us electronically. Click [here](#) for a friendly step-by-step guide, then click the "**Join and Respond**" button below to begin this process. Still have questions after reviewing the guide? Feel free to reach out to us at coupa@helpathome.com. We look forward to working with you!

The Help at Home Team
coupa@helpathome.com

Join and Respond **Respond Without Joining**

coupa
Business Spend Management

Supplier Onboarding cont.

Step 3:

Edit and complete any required fields below

Step 4:

Review and confirm Coupa's
Privacy Policy and Terms of Use

Step 5:

Once complete,
Select "Create an Account"

Create an Account

Help at Home is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Help at Home so you're ready to do business together.

* **Business Name**
CoupaTestSupplier1
Your legal business name (or legal personal name if an individual)

* **Email**
CoupaTestSupplier1@helpathome.com

* **First Name** Coupa * **Last Name** TestSupplier1

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

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

Create an Account

Already have an account? [LOG IN](#)

[Forward this to someone](#)

Annotations: A dashed pink arrow points from the 'Step 4' text to the checkbox. Another dashed pink arrow points from the 'Step 5' text to the 'Create an Account' button.

Note:

❖ Coupa is no charge to you as the supplier

Supplier Onboarding cont.

Step 6:

If possible, you may fill out the “Join an Existing Account”. If not, Select “No, continue creating a new account”

Note:

- ❖ Most Suppliers will need to create a new account

Step 7:

Select, “Next”

Join an Existing Account?

Provide any of the additional info to get better suggestions.

View existing accounts matching email domain **helpathome.com**
Business Name

Country/Region

Address

City **State** **Postal Code**
Tax ID **DUNS Number**

No, continue creating a new account

Supplier Onboarding cont.

Step 8:

Complete all required fields below

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Your Contact Information

* First Name * Last Name

* Phone Number

* Country/Region

* Address

* City State * Postal Code

Next

[Skip for Now](#)

Step 9:

Select, "Next"



Supplier Onboarding cont.

Step 10:

Continue to follow and complete the required fields below

Help at Home
Care to Live Your Life.

Tell Us About Your Business

* Business Website

 I do not have a website

* Tax ID (or Local ID)

Tax ID is to confirm you are a real business. Individuals may use your Social Security number.
 I do not have a Tax ID

DUNS Number

Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.

Next

Skip for Now

Note:

- ❖ Tax ID should match your Form W9

Step 11:

Select, "Next"

Supplier Onboarding cont.

Step 12:

The address you entered from Step 8 will auto populate here. If necessary, correct anything to align with your companies Invoice-From Location

Help at Home
Care to Live Your Life.

Confirm Invoice-From Location

This is the main address of your registered business or the registered entity you will be invoicing your customer from.

* Country/Region
United States

* Address
33 South State Street

* City State * Postal Code
Chicago Illinois 60603

Advanced Invoicing
Invoice-From Code
Recommended if you plan to use with Help at Home in integration for invoicing (cXML or SFTP).

* Preferred Invoicing Language
English (US)

Tax Country/Region Tax ID ⓘ
United States

I don't have Tax ID Number [+ Additional Tax ID](#)

Next

[Skip for Now](#)

Step 13:

Select, "Next"



Cont.

Step 14:

Enter in your Pay-To Location (Remit-To) in all required fields below

OR

Select the drop down to populate the "Same as Invoice-From Location" (*determined in Step 12*)

Note:

- ❖ Only do this if addresses are the same

Help at Home.
Care to Live Your Life.

Confirm Pay-To Location (Remit-To)

This is the address your customer will use to send your payment, remittance address.

Add New Pay-To Location

* Country/Region
United States

* Address

* City State * Postal Code

Advanced Invoicing
Pay-To (Remit-To) Code

Recommended if you plan to use with Help at Home in integration for invoicing (cXML or SFTP).

Next

Confirm Pay-To Location (Remit-To)

This is the address your customer will use to send your payment, remittance address.

Add New Pay-To Location

Same as Invoice-From Location

Add New Pay-To Location

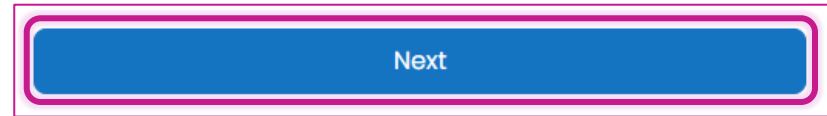
United States

* Address

Supplier Onboarding cont.

Step 15:

Once complete, Select, "Next" ----->



Step 16:

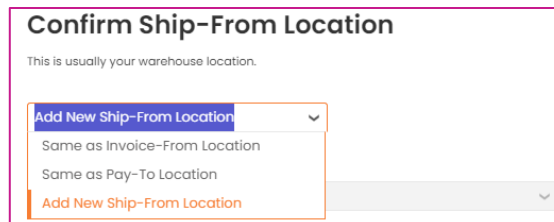
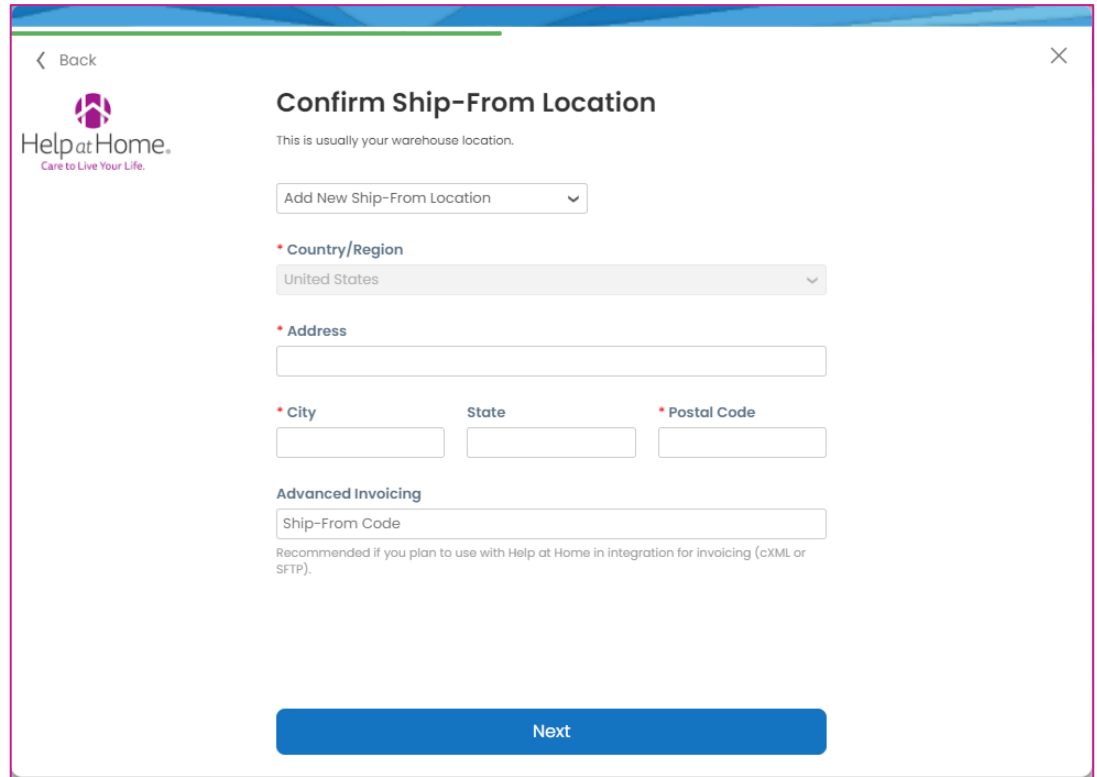
Input your Ship-From Location in all required fields

OR

Select the drop down to populate a previous address type and select accordingly

Note:

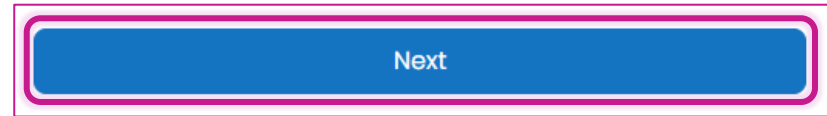
- ❖ Only do this if a previous address is the same



Supplier Onboarding cont.

Step 17:

Once complete, Select, "Next" ----->



Step 18:

Complete all fields

Note:

- ❖ Wire Routing Number and SWIFT/BIC Code are not required
- ❖ If no SWIFT/BIC Code, you must select the box underneath that field

Step 19:

Attach your Bank Verification document by selecting "Choose Files" and browse your device and select the appropriate file

Step 20:

Once complete, Select, "Next" ----->

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Accept Bank Payment

Account information where Help at Home should pay you.

Country/Region: United States

State: [] Currency: USD

Bank Name: []

Account Number: []

Confirm Account Number: []

ACH Routing Number: []

Wire Routing Number: []

SWIFT/BIC Code: []

My bank does not have a BIC code

Supporting Documents

Choose Files No file chosen

Please upload a valid check, bank statement or a bank letter to confirm account ownership.

Next

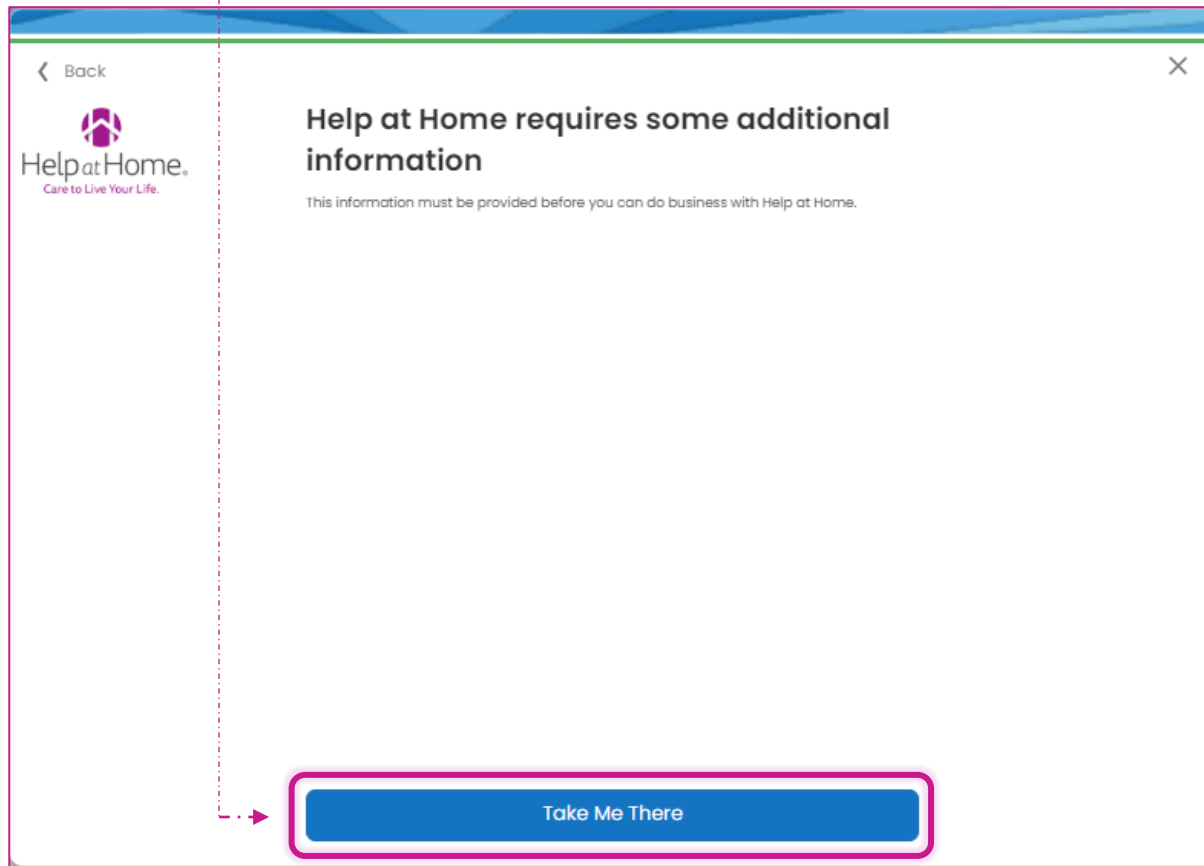
Skip for Now

PDF format required

Supplier Onboarding cont.

Step 21:

Select, "Take Me There"



Cont.

Step 22:

From this page, complete all applicable fields

Note:

- ❖ Primary Address: must match the address on Form W9

Step 23:

Attach signed MSA/Contract by selecting “Choose Files”, then browse your device to select the appropriate file

The screenshot shows the 'Supplier Information Request Form' in the Coupa Supplier Portal. The page has a blue header with navigation links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, and Add-ons. Below the header, there are tabs for 'Your Profile', 'Information Requests', and 'Coupa Verified'. The main content area is titled 'Help at Home' and includes a dropdown menu for 'Profile' set to 'Help at Home'. A yellow notification bar states: 'We have auto-filled some information from your Public Profile.' The form is divided into sections: 'Supplier Information' (with 'CoupaTestSupplier2' as the supplier name and 'Legal Entity' as 'CoupaTestSupplier2'), 'Supplier Information Request Form' (with a prompt to provide requested information), and 'Company Information'. The 'Company Information' section includes a required field for 'Primary Address' with sub-fields for Country/Region (United States), Address Name, Street Address, Street Address 2, City, State Region (None), Postal Code, Location Code, PO Box, and PO Box Postal Code. At the bottom, there is a 'Signed MSA' section with a 'Choose File' button and the text 'No file chosen'. A note below this section reads: 'If no MSA or SOW attach document stating "No MSA"'. A pink callout box points to the 'Choose File' button with the text: 'If not applicable, attach a blank document titled "No MSA"'. A pink arrow points from the 'Note' box to the 'Primary Address' section, and a dashed pink arrow points from the 'Step 23' text to the 'Choose File' button.

If not applicable, attach a blank document titled "No MSA"

Choose File

No file chosen

If no MSA or SOW attach document stating "No MSA"

Supplier Onboarding cont.

Step 24:

Continue to fill in all required fields or make any changes to the contact if necessary

* Primary Contact

First Name

Last Name

Email address ⓘ

Work Phone

Mobile Phone

Fax

* PO Email ⓘ

Tax Information

* Tax Classification

* TIN

This is your 9 digit tax ID number

When a PO is created, this email address receives the order

Note:
❖ Located in Box 3 on Form W9



Supplier Onboarding cont.

Step 25:

Select the drop down to chose W9 (or W8 for Foreign entities)

* Federal Tax Form

* Type

* Attachments Add [File](#)

The W9/W8 Name and Address should match information entered above

Step 26:

Then Select, "File" to browse your device for your tax document and attach

Step 27:

Select, "Add Remit-To"

New Remit To Address Information

Please add a new Remit To by selecting the Add Remit To button below

- 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](#)

* Bank Form No file chosen

Bank Letter or Voided Check

Supplier Onboarding cont.

Step 28:

Select “Choose”, to populate details previously entered in Step 14

Note:

- ❖ The Remit-To Address is where electronic payments will be received

OR

If previously entered details are not correct, select “Create New Remit-To Address” and complete all required guided steps and fields

Choose Remit-To Address

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

12345 S. State Street Bank Account (Test Bank)
Chicago, IL 60603
United States
United States

Choose

12345 S. State Street
Chicago, IL 60603
United States

Choose

+ Create New Remit-To Address

Cancel

Please add a new Remit To by selecting the Add Remit To button below

Supplier Onboarding cont.

Step 29:

Continue to fill in all required fields

Step 30:

Attach your Bank Verification document by selecting “Choose Files” and browse your device and select the appropriate file

* Remit-To Address

* Street Address 12345 S. State Street

Street Address 2

* Postal Code 60603

* City Chicago

* State Region IL

* Country/Region United States

* Bank Account Number *****456

* Bank Routing Number *****021

* Account Type Select

* Bank Address

* Bank City

* Bank State or Region IL

* Bank Postal Code

* Bank Country/Region United States

* Bank Form **Choose File** No file chosen
Bank Letter or Voided Check



Supplier Onboarding cont.


Step 31:

Select the Supplier Code of Conduct document to download to your device for review

Note:

- ❖ If you are unable to download and review, contact Coupa@helpathome.com for a copy

Supplier Code of Conduct

-  **HaH_Supplier_Code_of_Conduct.pdf**
Help at Home Supplier Code of Conduct

* Yes

Yes Supplier agrees that they have received, read and will abide by Help at Home's Supplier Code of Conduct

Step 32:

Once reviewed, Select “Yes” to agree and confirm

Supplier Onboarding cont.

Step 33:

Review the Payment Notice to Suppliers, Select “Check Box” to agree and confirm

Payment Notice to Suppliers

All active and onboarded Supplier(s) doing business with any Help at Home entity (“HAH”) and receiving purchase orders (“PO”) via the Coupa Supplier Portal shall submit invoices for payment by the aforementioned portal, which is accessible at the following url: <https://supplier.coupa.com>. Suppliers should not send invoices intended for payment directly to an individual HAH staff member. Failure on the part of the Supplier to submit invoices via the Coupa Supplier Portal may see a delay in payment outside of the agreed payment terms and/or the date listed on the invoice.

HAH reserves the right to delay and/or contest supplier invoices that are not submitted within 180 days of the date of service and/or the product delivery date. HAH shall make timely efforts to ensure that a current PO is in place prior to contracting with a Supplier for requested goods and/or services. HAH should be notified by the Supplier in the event that an open PO does not exist for the product and/or service of the pending invoice. HAH shall make all payments issued out of Coupa in United States dollars (USD) and via virtual card, digital check, or by direct account to account bank payments as set forth in the online supplier onboarding process. HAH shall not withhold any applicable taxes from payment due to the Supplier.

* Check Box

Yes Supplier agrees that they have received HAH Payment Notice to Suppliers

Step 34:

Select, “Submit for Approval”

Before selection, ensure all details entered are correct along with attached documents

Decline

Save

Submit for Approval



Action Complete

Submitting an Invoice

Invoicing

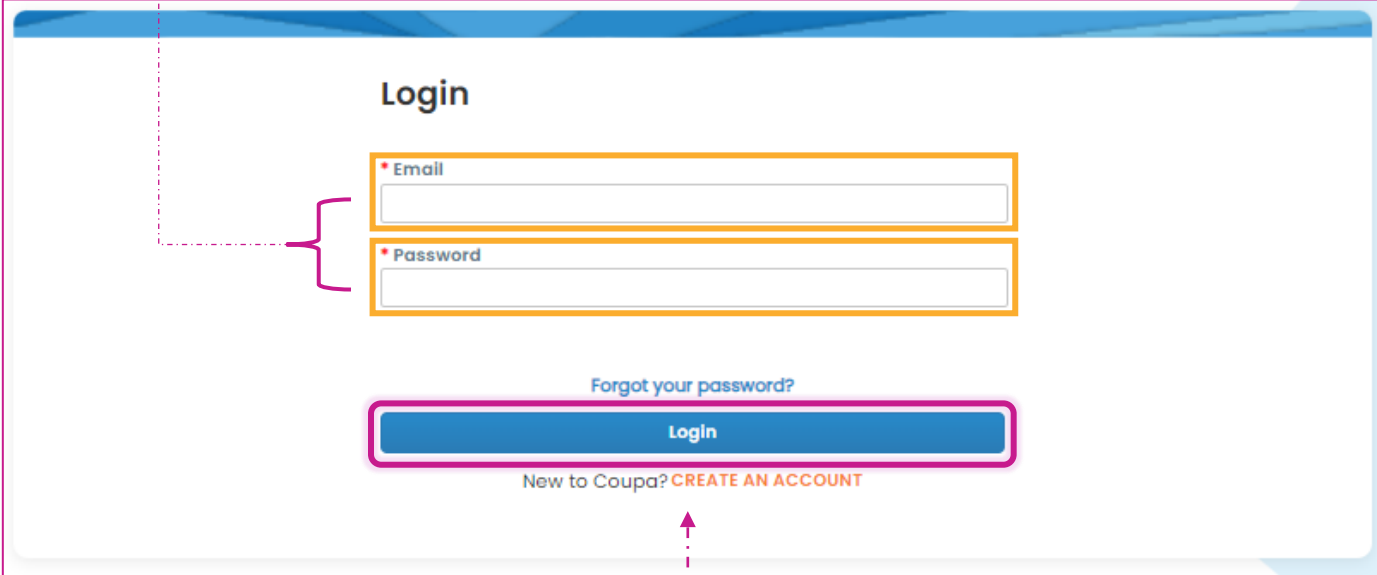
Submitting an Invoice

Step 1:

Go to <https://supplier.coupahost.com/>

Step 2:

Enter your Login information



The screenshot shows a web browser window displaying the Coupa login page. The page has a blue header and a white main content area. The title "Login" is centered at the top. Below the title are two input fields: "Email" and "Password", both with red asterisks indicating they are required. A purple bracket on the left side of the page groups these two fields together. Below the input fields is a link that says "Forgot your password?". At the bottom of the form is a blue button with the text "Login". Below the button is a link that says "New to Coupa? CREATE AN ACCOUNT". A purple dashed arrow points from the "Login" button up to the "CREATE AN ACCOUNT" link.

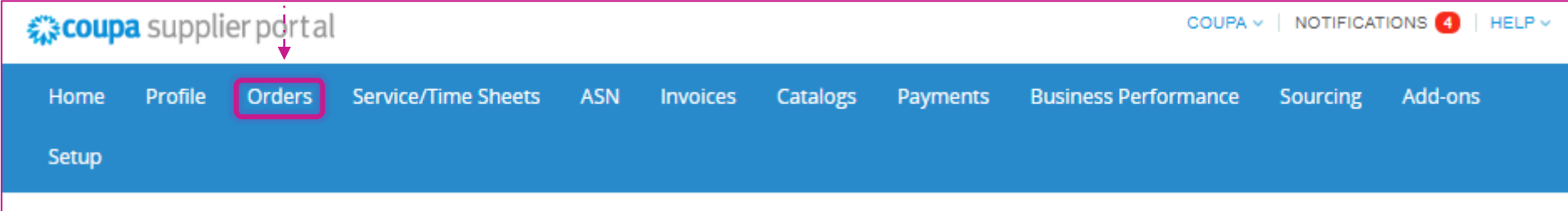
Step 3:

Select "Login"

Submitting an Invoice cont.

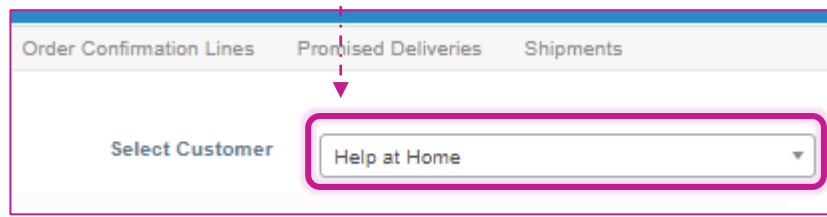
Step 4:

Select, "Orders" located in the blue header



Step 5:

Ensure Help at Home is your selected customer; if it is not, select the drop down and choose Help at Home




Submitting an Invoice cont.













Step 6:

Locate the PO that needs invoice submission, then select the gold coins for that line

Purchase Orders

Instructions From Customer
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
13086	08/07/23	Issued	None	Reoccurring Monthly Services - Test 2023	No	600.00		   
13085	08/07/23	Issued	None	One Time Service - Test 2023	No	225.00		   
13066	08/07/23	Issued	None	Guide Creation 2023	No	100.00		   

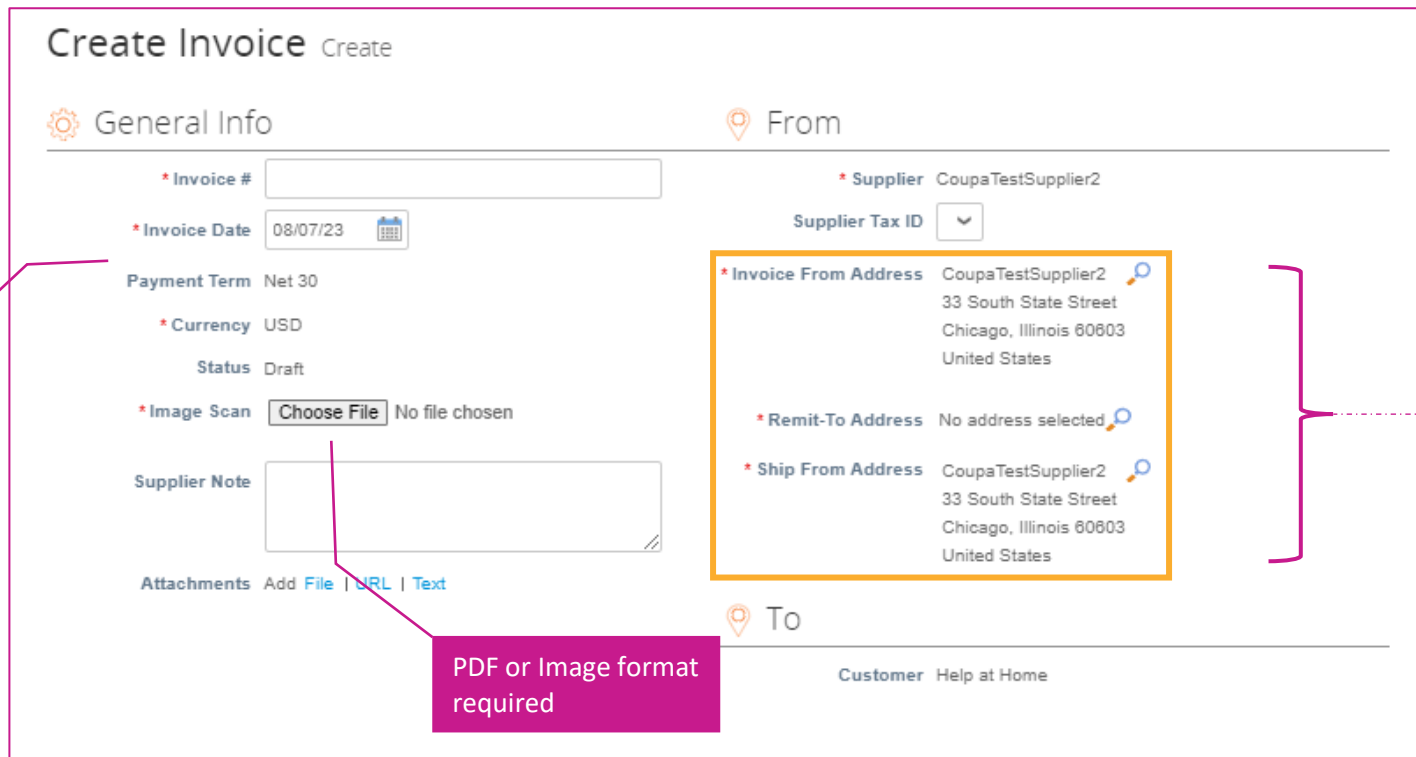
Note:

- ❖ If there are multiple invoices for one PO, each invoice needs to be submitted individually. You can do this by repeating the processes, starting at **Step 4**.

Submitting an Invoice cont.

Step 7:


In the From Section, ensure all Addresses are populated and all information is correct. If not, select the magnifying glass icon  to edit and update accordingly



Create Invoice Create

General Info

* Invoice #

* Invoice Date 08/07/23 

Payment Term Net 30

* Currency USD

Status Draft

* Image Scan No file chosen

Supplier Note

Attachments Add [File](#) | [URL](#) | [Text](#)

From

* Supplier CoupaTestSupplier2

Supplier Tax ID

* Invoice From Address CoupaTestSupplier2
33 South State Street
Chicago, Illinois 60603
United States

* Remit-To Address No address selected

* Ship From Address CoupaTestSupplier2
33 South State Street
Chicago, Illinois 60603
United States

To

Customer Help at Home

Must match invoice date on attachment for timely payment

PDF or Image format required

Step 8:

In the General Info section, complete all required fields

Note:

- ❖ PO # required on attached invoices

Submitting an Invoice cont.

Step 9:

Ensure all details within the Line section are accurate for item/service pricing, per the invoice

Lines Line Level Taxation

Type	Description	Price		
	<input type="text" value="Guide Creation 2023"/>	<input type="text" value="100.00"/>	100.00 ✖	
PO Line 13066-1	Service/Time Sheet Line None	Contract <input type="text" value="▼"/>	Supplier Part Number <input type="text"/>	
Billing 160-01-C0031-160:002				

+ Add Line + Pick lines from Contract Totals & Taxes

Additional lines can be added here, if item/service is missing

Note:

- ❖ Full amount of PO populates in the Price field, adjust if invoice amount is less or multiple invoices required

Submitting an Invoice cont.

Step 10:

Enter any applicable Shipping, Handling, and Tax amounts in the corresponding field(s). Select, "Calculate" to refresh totals

Note:

- ❖ Total should match attached invoice

Totals & Taxes	
Lines Net Total	100.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.00"/>
Total Tax	0.00
Net Total	100.00
Total	100.00

Buttons: Delete, Cancel, Save as Draft, Calculate, **Submit**

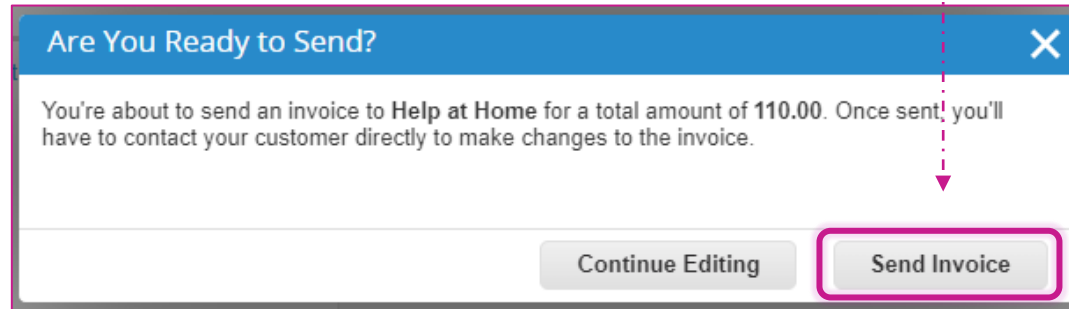
Step 11:

Once reviewed and all details are correct, Select "Submit"

Submitting an Invoice cont.

Step 12:

Select, "Send Invoice" to complete submission



Step 13:

Once any errors are corrected and the invoice was submitted correctly, the below message will appear

The screenshot shows the "Invoices" page. At the top, there is a green notification bar with the text: "CoupaTestSupplier2 invoice #INV1-GC2023 is pending approval" and a close button (X). Below this, there is a section titled "Instructions From Customer" with the text: "For the link to a step-by-step guide, please reference the email invitation sent from 'do_not_reply@supplier-test.coupahost.com' with the subject 'Help at Home Profile Information Request - Action Required'." Below the instructions, there is a "Create Invoices" section with an information icon (i) and four buttons: "Create Invoice from PO", "Create Invoice from Contract", "Create Blank Invoice", and "Create Credit Note". Below the buttons, there is a table with columns: "Invoice #", "Created Date", "Status", "PO #", "Total", "Unanswered Comments", "Dispute Reason", and "Actions". The table contains one row with the following data: "INV1-GC2023", "08/09/23", "Pending Approval", "13066", "110.00", "No". At the bottom of the table, there is a footer: "Per page 15 | 45 | 90". A red dashed arrow points from the text "the below message will appear" to the green notification bar.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV1-GC2023	08/09/23	Pending Approval	13066	110.00	No		



Action Complete

Invoice Status

Payment

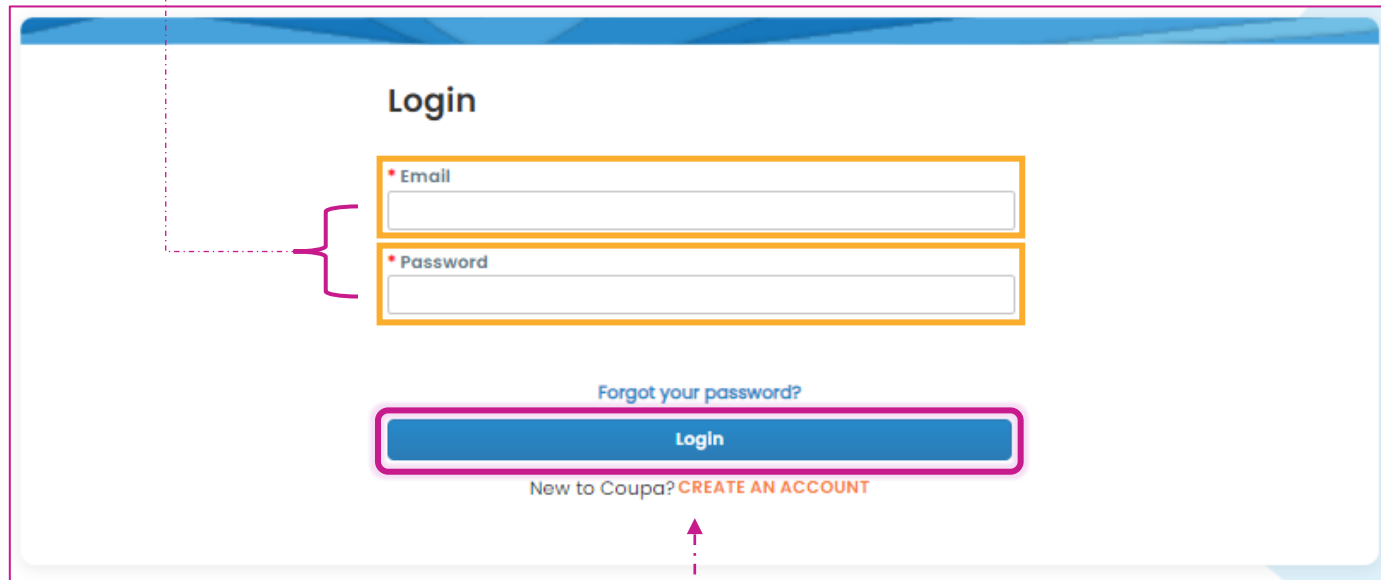
Invoice Status

Step 1:

Go to <https://supplier.coupahost.com/>

Step 2:

Enter your Login information



The screenshot shows a web browser window with a blue header. The main content area is titled "Login". Below the title are two input fields: "Email" and "Password", both with red asterisks indicating they are required. A purple bracket on the left side of the page groups these two fields. Below the input fields is a link that says "Forgot your password?". Underneath that is a blue button with the text "Login". At the bottom of the form area, there is a link that says "New to Coupa? CREATE AN ACCOUNT". A purple dashed arrow points from the "Login" button down to the "CREATE AN ACCOUNT" link. Another purple dashed arrow points from the "Enter your Login information" text to the "Email" and "Password" input fields.

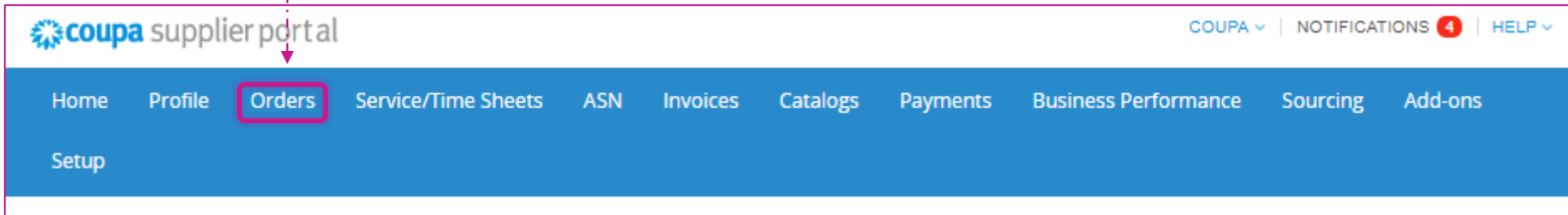
Step 3:

Select "Login"

Invoice Status cont.

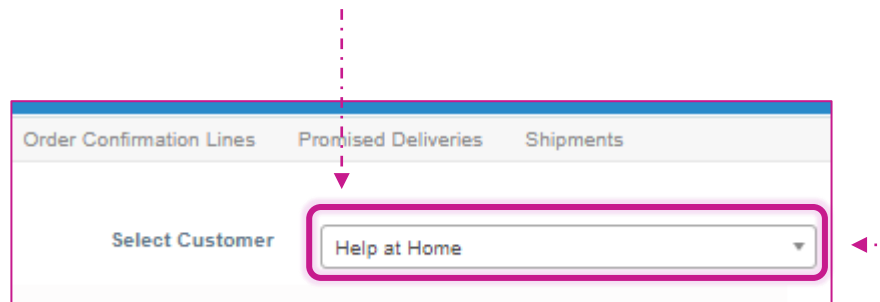
Step 4:

Select, "Orders" located in the blue header



Step 5:

Ensure Help at Home is your selected customer; if it is not, select the drop down and click on Help at Home



Invoice Status cont.

Step 6:

Locate View, ensure "Payment Information" is selected

Export to ▾		View		Payment Information ▾		Search 🔍	
Paid	PO #	Invoice #	Status	Invoice Date	Payment Term ▾	Date Of Supply	Payment Information
No	13086	INV12-RMS2023	Pending Approval	07/12/23	Net 30	08/10/23	
Yes	13086	INV9-RMS2023	Approved	08/04/23	Net 30	08/09/23	
Yes	13086	INV7-RMS2023	Approved	08/01/23	Net 30	08/09/23	
No	13086	INV5-RMS2023	Draft	07/13/23	Net 30	08/09/23	
No	13085	INV2-OTT2023	Disputed	07/01/23	Net 30	08/09/23	
No	13085	INV1-OTT2023	Voided	07/01/23	Net 30	08/09/23	
Yes	13066	INV1-GC2023	Approved	08/01/23	Net 30	08/09/23	

Look here to see if an invoice has been paid and consult the Payment Information column for details

Status Definitions

Draft	Remains editable, not yet submitted
Pending Approval	Processing with HAH
Approved	To be Paid or Paid
Disputed	Incorrect, supplier action required
Voided	Incorrect, resubmission required



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