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A) BACKGROUND

This Guide is for the MSK Supplier Portal powered by Coupa (CSP), which is a free tool for suppliers to easily conduct business with MSK. In the CSP you will also manage various content and settings.

Some of the content and available information is:

- Ability to view invoice status and payment information
- View purchase orders from all your customers
- Ability to easily create po-based invoices online via “PO flip”
- Non-po invoices can also be created online in the CSP

Please note that the initial supplier set-up process consists of the following:

- Registering your eCommerce Supplier Portal (CSP) account.
- Creating your Legal Entity
- Setting your Coupa Accelerate / Early Payment Discount Preferences

B) HELPFUL HINTS & WHERE TO GO FOR HELP

- If you need assistance registering in the CSP or updating your Company’s banking information please email CSPSupplier@mskcc.org
- The recommended internet browser for Coupa is Chrome. You might experience functionality and navigation issues using other internet browsers.
- Please be aware of the autofill settings on your browser. If they are turned on, data may populate incorrectly in your Profile.
- When using the CSP, due to the thousands of suppliers utilizing the database, please note that it may take a few minutes for your MSK profile to load.
- Some companies may have multiple MSK profiles. This is due to the MSK Procurement Department’s configuration. **PROFILES ARE INDEPENDENT AND CANNOT BE MERGED INTO ONE. Please contact your MSKCC Procurement Representative for more information.**
C) REGISTER FOR THE CSP WITH AN INVITATION FROM MSK - FIRST TIME USERS

You will receive the following e-mail from the MSK Supplier Portal powered by Coupa (aka the Coupa Supplier Portal or the CSP) which contains a unique link at the bottom of that email to join the CSP. Click on the blue JOIN COUPA rectangle and you will be directed to the Coupa Supplier Portal to register your account.

Important note: You must register for the CSP using the email address that received the invitation. If you would like to register for the CSP using a different email address or if you are not the correct person to complete the forms, please e-mail CSPSupplier@mskcc.org.

If you would like to have the invitation sent to multiple users, you will receive an additional e-mail with a SUGGESTION e-mail.

Subject: Add Users to Account

Add Users to Account

Hello Lloyd,
Customer Memorial Sloan Kettering Cancer Center is suggesting the addition of lloydscrawford@gmail.com and soteropoulosph@gmail.com as users to your account.
Click “Sign Up” if you are a new user & “Log In” if you are an existing Coupa User.

If you are already a registered or existing Coupa user and you forget your password, click Forget Password and an email will be sent to the registered email address with the following information:

**Subject line:** Requested Password Reset Instructions for Coupa  
**Body email:** A password reset request was initiated for your user’s account. You can click the button below to create a new password.

*If you did not initiate this request, please review your login settings, add two-factor authentication to improve security, and notify someone at your company per your internal policies if you think this email may have been malicious.*

**Create New Password**

**Helpful Hint:** Save [https://supplier.coupahost.com](https://supplier.coupahost.com) as a favorites link for quick access when you need to return to the site. The link in the email will expire after 7 days.

The Coupa Supplier Portal will be your home screen, and a dashboard of information about your Company will be displayed.

**Note:** you do not need to take any actions to complete your Company Profile during your initial set-up. Profile updates are only necessary when changing your Company information.
If you are a new user, your e-mail must be verified. A verification e-mail will be sent to you. Click On “CONFIRM E-MAIL”.

After you have confirmed the e-mail, the following information must be completed:

- Enter the First Name of the Coupa User
- Enter The Last Name of the Coupa User
- The Company Name should be populated from your previous entry
- Follow the directions for creating a password
- Click on the acceptance of Privacy Policy and Terms of Use
You will be asked if you want to get paid via credit card / Virtual Card. If you wish to receive payment for your Company’s invoices via credit card, then either confirm the default e-mail address or change it.

*Note: if you choose to be paid via credit card and then change your mind, you can deactivate this choice in Setup – Remit To and then disable this option.

If you do not wish to receive payment for your Company’s invoices via Virtual Card you should select “My company does not accept credit card payment” and move forward.
Static Discounting is explained in more detail in another section of this Guide. However, if you wish to activate this feature, **depending on original payment terms**, select one of the discount terms displayed. If you do not want to offer accelerated discounts select “My company does not offer discounts”.

After you have logged in, you will be at the **HOME screen**

**D. UNDERSTANDING THE CSP HOME SCREEN STRUCTURE**
1. **Navigation Bar**
   You can configure your account and administer your connection through the CSP. Access to these tabs provides you with the real-time status of your invoices with MSK. You can even communicate with MSK by entering comments within the CSP.

![Coupa Supplier Portal](image)

2. **Notifications**
   In the top right-hand section of the home screen, you will see a red bubble next to Notifications. You can readily see if there is anything requiring your attention.

![Coupa Supplier Portal](image)

**E. CREATE A LEGAL ENTITY & PAYMENT TYPES**

If your company has not connected with other customers on the CSP, you’ll need to create a Legal Entity. Navigate to the Setup tab and click Legal Entity Setup. Then hit Add Legal Entity.

![Coupa Supplier Portal](image)

After clicking Add Legal Entity, you will see the different data entry screens that you must complete. Explanations of the various sections are contained in the following pages.

- Provide a Legal Entity Name and enter the principal Country where your business is located.
You can select which customers you would like to see this update, or you can select All if it pertains to every customer listed.

Which customers do you want to see this?

- All
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (123456-001)
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (123456-W01)
- Memorial Sloan Kettering Cancer Center - LAC Enterprise 2020 Inc. (U123456-001)
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-001)
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-002)
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT (136378-001)
- Memorial Sloan Kettering Cancer Center - PEOPLEFLUENT, INC. (136378-003)

- Complete the required (*) invoicing fields when prompted by the CSP. **When entering address information in Address Line 1 and Address Line 2, please insure you do not exceed 35 characters on each Address line.** Although the “State” field does not contain an asterisk (*), it must be filled in. You can also **“Use this address for Remit To”** and **“Use this for Ship From Address”** if you do not uncheck the designated sections below. Complete the **“Tax ID”.** Everything else is optional.
After completing the required address information, click “Save and Continue”

On the next screen, you will be able to enter additional information depending on which “Payment Type” you will be using. The information to be entered will depend on whether you choose “Address”, “Bank Account” or “Virtual Card”.
Address – *Used for mailing of checks*

Where do you want to receive payment?

- *Payment Type* Address
- Address
- Bank Account
- Virtual Card

What is your Remit-To Contact?

Address Line 1 555 N Mountain Avenue
Address Line 2
City Montclair
State AZ
Postal Code 07043
Country/Region United States

- **Filling in the “Address” and/or “Bank Account” information WILL NOT trigger anything on the MSKCC side of the application without an official form being sent from MSKCC.**
- **Selecting Virtual Card WILL trigger MSKCC to proceed with virtual card setup.**

Bank Account – *(Used for getting paid via ACH)*

- Fill in all information as shown below for “What are your Bank Account Details?"
- Fill in all information as shown below for “What is your Bank's Branch Address?”
- Who is your Remit-To Contact? - not Needed
- Click Save and Continue
Where do you want to receive payment?

Payment Type: Bank Account

What are your Bank Account Details?

- Bank Account Country/Region: United States
- Bank Account Currency: USD
- Beneficiary Name: YOUR COMPANY NAME
- Bank Name: Chase
- Account Number: 123456789
- Confirm Account Number: 123456789
- ACH Routing Number: 021000021
- Wire Routing Number: 
- SWIFT/BIC Code: 
- Bank Account Type: Business
- Supporting Documents: No file chosen

What is your Bank’s Branch Address?

- Address Line 1: 555 Mountain Avenue
- Address Line 2: 
- City: Brooklyn
- State: Alaska-AK
- Postal Code: 12356

Who is your Remit-To Contact? (optional)

What is your Remit-To Address?

- Address Line 1: 555 N Mountain Avenue
- Address Line 2: 
- City: Montclair
- State: AZ
- Postal Code: 07043
- Country/Region: United States

Save & Continue
**Virtual Card** - *(Used for getting paid via Virtual Credit Card)*

- Fill in the recipients e-mail address
- Fill in the general remit to Address – (This may be populated already)
- Integration Code can be left black unless otherwise instructed
- Click **Save and Continue**

**Where do you want to receive payment?**

![Payment Type Options]

**Virtual Card Information**

- **Email Address**
- **Process credit cards automatically?**

**What is your Remit-To Address?**

- **Address Line 1**
- **Address Line 2**
- **City**
- **State**
- **Postal Code**
- **Country/Region**

**What is your Remit-To Integration Code? (optional)**

![Integration Code Box]

**DO NOT CHECK THIS BOX UNLESS INSTRUCTED TO DO SO**
Virtual Card Guidelines

Before activating a virtual card, please review pertinent details by utilizing the link below. This will help familiarize you with the Coupa Pay application and will answer any preliminary questions you might have.

https://supplier.coupa.com/memorial-sloan-kettering-payment/

Also, please note the following setup guidelines and requirements which will facilitate your use of the Coupa Pay application:

- When requesting a Supplier Payment Account, the email on the Supplier Payment Account should belong to the individual who actually will be receiving the Virtual Card and will be charging payments to the Card.

- Emails containing all information pertaining to Virtual Card usage, charging the Card etc. will be sent by no.replies@paymentnet.jpmorgan.com to the email address on the Supplier Payment Account.

- If your Company is linked to the Coupa Supplier Portal, the individual whose email is on the Supplier Payment Account will automatically receive remittance advice emails, but such emails will be sent separately from the Virtual Card usage emails.

- In order for an individual from your Company to receive other emails pertaining to Coupa Pay transactions related to Virtual Cards, they must be setup by the Administrator in the Coupa Supplier Portal with the Payments role, and they must also have the appropriate notifications enabled for both Online and Email.

- **Would you please confirm the following:** The email on the Supplier Payment Account request belongs to the individual who will actually be receiving the Virtua Card and will be charging payments to the card.

*Would you also please let us know if you currently use a Third Party Payment Provider and also the name of that Provider if applicable. This information will help facilitate your Coupa Pay setup.*

*Finally, would you please provide the best email address and phone number for contacting you if you need assistance or have any questions so that anyone copied above can reach out to you directly.*
The screen shown below allows you to confirm where you will be receiving payment. You also have the option to add another remit-to by clicking “Add Remit-to”, completing the applicable information and then clicking on NEXT when done.

Where do you want to receive payment?

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

<table>
<thead>
<tr>
<th>Remit-To Account</th>
<th>Remit-To Address</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>1824 RAINBOW LANE</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>WOONSOCKET</td>
<td></td>
</tr>
<tr>
<td></td>
<td>RI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>02895</td>
<td></td>
</tr>
<tr>
<td></td>
<td>United States</td>
<td></td>
</tr>
</tbody>
</table>

This screen verifies where you ship goods from. You also have the option to add another Ship From address by clicking “Add Ship From”, completing the applicable information and then clicking NEXT when done.

Where do you ship goods from?

For many countries regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

<table>
<thead>
<tr>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1824 RAINBOW LANE</td>
<td>Active</td>
</tr>
<tr>
<td>WOONSOCKET</td>
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</tr>
<tr>
<td>02895</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
</tbody>
</table>

15
Setup Complete

Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.**
- Click on the **Profile Tab** to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders] [Go to Invoices] [Return to Admin] [Done]
F. SET COUPA PAYMENT TERM PREFERENCES/ EARLY PAYMENTS /ACCELERATED DISCOUNTS

This section is to be used ONLY IF EARLY PAYMENT DISCOUNTS are desired.

Navigate to the Setup tab, click Payment Preferences, Static Discounting, and then click Edit

The Payment Terms are determined at the initial supplier setup. Memorial Sloan’s default payment terms are N60.
To initiate Early Payment Discounts, you must first know what your original payment terms are... N30, N45, N60 etc.

Once that is determined, you can **ONLY** Choose the options listed under your default payment terms.

*For example... If your initial payment terms are N30, you can ONLY choose options from the N30 dropdown menu.*

- **Selection of Terms**
  - Select the desired option from your ORIGINAL payment Term.
- **Name and Email**
  - Enter the name and email of the person or group who approved these accelerated terms.
- **Checkbox**
  - Selecting the “Apply to ALL invoices” checkbox below will automatically accelerate all invoices. By leaving this box unchecked you can choose to accelerate or not accelerate invoices at the transaction level.

**NOTE** If a special payment term - other than the normal payment term - is selected at the PO level, it cannot be overridden.

### G. CSP FUNCTIONALITY

#### 1. Invoices

**Important Note – Invoices Against Purchase Orders**

The following only applies to invoicing against purchase orders and/or purchase order lines with a unit of measure of "DO" and a unit price of $1.00: the line amount must always match the line quantity. For example, if you have an invoice totaling $504.75, the invoice line amount must be entered as $504.75 and the invoice quantity must be entered as 504.75.

- Selecting “**Invoices**” from the menu will take you to a screen where you can view invoices. This will provide a summary of all previously entered invoices. Clicking on the blue “**invoice#**” will open the invoice.
- This screen provides a real-time view into the current stage of the invoice status.
  - **Approved** indicates the invoice has been processed for payment.
  - **Draft** invoices HAVE NOT been submitted to MSK and can be edited by clicking on the pencil icon in the “Actions” column.
  - **Pending Approval** indicates the invoice is pending approval in Coupa by MSK.
• Creating invoices

NOTE: Depending on your initial setup with MSK, the ability to create invoices may not be available to you when you first log into the CSP.

○ Create Invoice from PO
  ▪ Clicking this button will allow you to create a PO backed invoice. Specific information will populate certain required fields directly from the PO (such as “Bill to Address”).
  ▪ Be certain to delete all purchase order lines from the current invoice that are not actually being invoiced against within that invoice.
  ▪ Invoices must be dated when shipments are released or when services are provided.

○ Create Invoice from Contract
  ▪ If your supplier provides you with a contract you can invoice from, this button will become available, otherwise it will remain inaccessible.

○ Create Blank Invoice
  ▪ If this button is available under your MSK Profile, then clicking this button will allow you to create a non-PO backed invoice. If either a Service Category or Invoice Header Account Number is required, you will be advised accordingly.

○ Create Credit Note
  ▪ Always select “Resolve issue for invoice number” and do not select “Other”.

○ Please be sure to complete all other required fields (*)
  ▪ For Requester Email please enter your MSK contact or na@na.com if not known
  ▪ For Requester Name please enter your MSK contact if known or “NA” if unknown.
  ▪ For non po invoices insure that you select the previously designated values for “Bill to Address”.
  ▪ If a Work Order Number is required as supporting documentation for the invoice, please insure that an attachment containing the Work Order Number is included with the invoice. Also, the Work Order Number must be entered in the “Supplier Part Number” section of the invoice line.
Transmitting Invoices Electronically (cXML, CSV, EDI)

- Electronic invoicing utilizing any of the above file formats will require special testing and co-ordination between suppliers and MSKCC. Please reach out directly via e-mail to CSPSupport@mskcc.samanage.com for additional information.

Important Additional Notes – Applicable to All invoices

- MSKCC is tax exempt. Therefore, taxes are never to be included in any field of any invoice.
- All invoices (po backed or non po backed) must include a pdf copy of the Company invoice as an attachment.

2. Creating an Invoice from a PO – MSKCC Common Practice

There are three ways to create an invoice from the PO:

- From the “Orders” Tab, Select the gold coins to the right of the PO number
  - Red Coins are for processing credits
- From within the Purchase Order, at the bottom, click Create Invoice
- From the “Invoice” Tab, select Create Invoice from PO

Once selected, If you have multiple profiles, you may get a screen asking for Invoicing Details. Select the Legal Entity, Remit-To and Ship From Address.

If you only have ONE profile,

- The address selected will populate on the newly created invoice as well as other information from the PO
- Manually enter the invoice number. **NOTE: THE SYSTEM WILL WARN IF A DUPLICATE INVOICE NUMBER IS USED.**
• The invoice date will default to today’s date
  - If the invoice is older than the day of input, you can only back date this section 45 days for the date of entry. Backdating further than the allowable 45 days will place the invoice in a “Dispute” status
• If special accelerated terms are selected, you may click the button to activate.
• Currency stays at USD.
• Shipping Terms can stay as “Best Way”
• **DO NOT PLACE ANY ATTACHMENTS IN THE “IMAGE SCAN” AREA**
• Supplier Notes can be left blank but feel free to enter any additional information if needed
• Attach INVOICE (PDF) and any other documents in the “Attachment, Add, File” Section

*Account Number & Service Category are left black unless processing a Non-PO backed invoice. Please contact finance at crawforl@mskcc.org for further instructions.*
Depending on how the PO is set up, you may or may not have to adjust any fields on the lines

- Shipping, Handling & Misc must prior be agreed upon with the procurement department
- Tax must be left blank because MSKCC is tax exempt. Tax Exempt certificates are available from Finance upon request
- Once you are satisfied, click the “Calculate” button to update the Total.
- You can “Save as Draft” and continue working on the invoice at a later time or you can “Submit”.

Once “Submit” is clicked, a pop-up message will appear. Click “Send Invoice” to finish.
2. **Obtaining Payment Information:**

Currently, Coupa does not provide remittance information for ACH payments. You can create a view to show invoices that have been “PAID.”

You can check for payment information by creating a custom view and utilizing the listed steps. Make sure you are in the Invoice section – Click on the “Invoices” tab

a) In the drop down to the right of **View** Click “Create View”

b) Enter the view name as something you will remember such as “MSK Payments”. Under Conditions, after “Filter By” choose “Paid ” from the drop-down and after “Filter Clause” choose “is” “Yes” .
c) Drag and drop fields such as “Paid” and “Payment Information” from the left column to the right column.

d) Click “Save”. You will now see the associated payment details pertaining to paid invoices.
3. **Purchase Orders**

Selecting the “Orders” icon from the navigation bar will take you to a screen where you can view purchase orders. This will provide a summary of all POs from MSK when Memorial Sloan Kettering Cancer Center is the selected customer. Clicking on the blue PO number will open another screen to see the entire PO.

- **Payment Terms**
  You will notice you can Accelerate your payment with the button to the right of your standard Payment Terms.

- **Acknowledged**
  Checking this box will notify MSK you have received the Purchase Order.

*You may have more than one profile with MSKCC so make sure you are selecting the correct Vendor Profile from the “Select Customer” drop-down list. Otherwise, you will not be able to view the PO.*
4. **My Account**
   - Selecting the “Account Settings” option from the dropdown under your name will take you to a screen where you can change your log-in information for the CSP.
   - In this screen you can change your Name & your Department, Role and Password.
   - Under “Notification Preferences” you can choose how you would like to receive each notification (Online, Email or SMS).
   - Selecting the “Log Out” icon from the dropdown under your name will log you out of the CSP and bring you back to the log-in screen.
5. **Setup / Admin Users**

Going to Setup from the Navigation Bar will take you to a screen where you can administer the users, update general company information, enter merge requests with already existing CSP portals for your company and where you can create “Remit To” addresses for the CSP.

- Selecting “Users” will provide functionality to add other users in your company to utilize the CSP. You can set their permissions and the customers they can view. You can also transfer the administrative role to another user in your company.
- Tabs can be removed by selecting “Edit” on each User and deselecting permissions.
- For example, while you may use the “Service/Time Sheets”, “ASN”, “Catalogs” tabs with other customers, MSK will not be using them. Therefore, these tabs (permissions) can be removed.
• Selecting “Merge Requests” will allow you to merge with any other CSP profiles from your company. This may happen if you have many divisions and customers using Coupa. Use this feature to keep them all together in the CSP.

![Coupa Supplier Portal](image)

• Selecting “Remit To” allows you to add or deactivate a legal entity in the CSP. (It does not allow you to edit).

![Coupa Supplier Portal](image)

• If you have multiple supplier entities and if you have logged in using one supplier entity and need to see data or transact for another supplier entity, then click on 1 “Profile” -> 2 “Information Requests”-> 3 “Profile Drop Down” menu and then on the 4 new entity.

![Coupa Supplier Portal](image)