

Coupa Supplier Registration and Electronic Invoicing

About this Guide

If this is your first time using Coupa you will need to register an account by following the steps below.

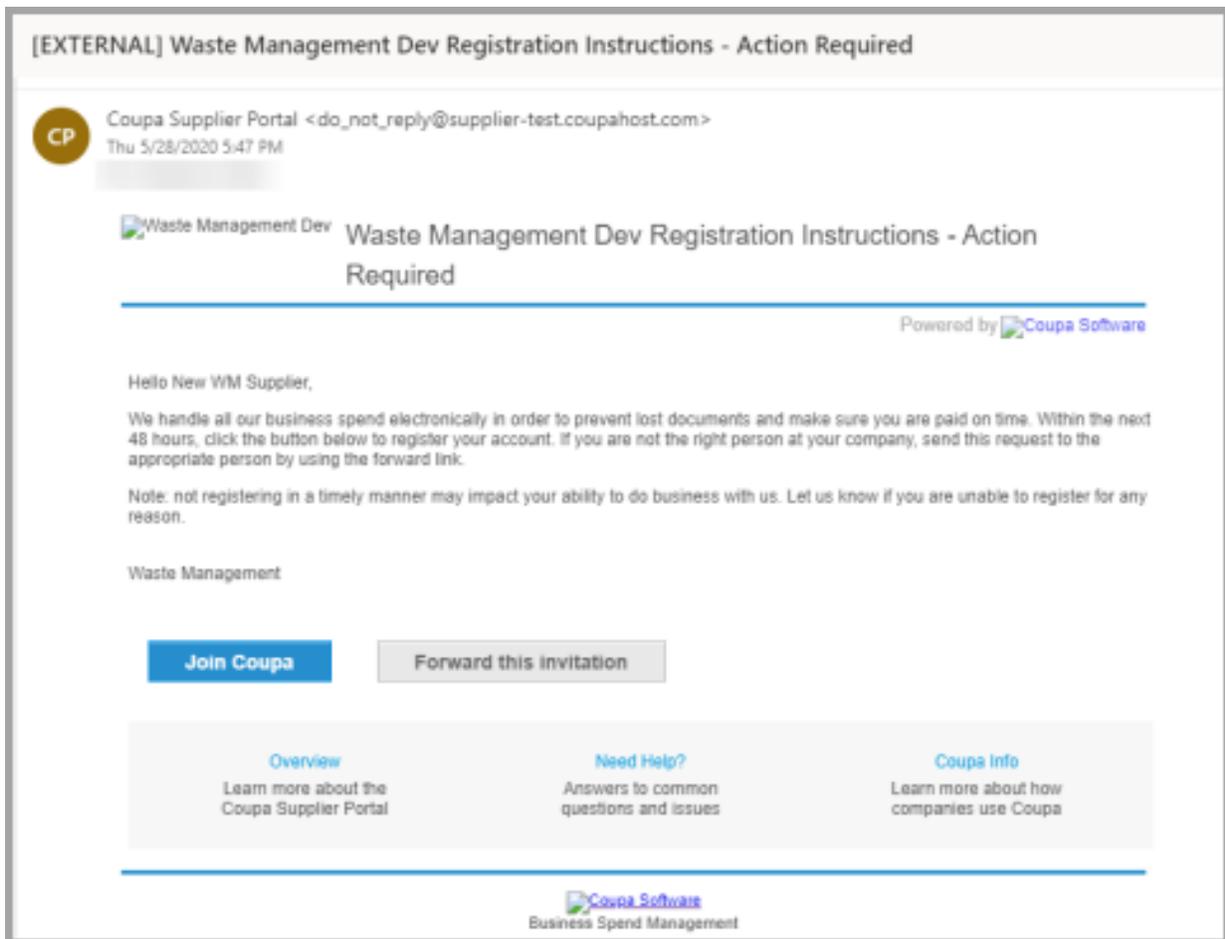
Already have an account with Coupa? Jump to [Step 3](#) to set up e-Invoicing.

Step 1: Invitation to Enroll

Before you can begin connecting with WM and taking advantage of the many great features offered in the Coupa Supplier Portal, you must first receive an invitation to enroll.

Didn't receive an invitation? Contact Supplier Support at wmsuppliersupport@wm.com. Please include your company name and contact information so that we can reach out to you. You will receive an email as the sample below.

To begin the registration process, click "Join Coupa," at the bottom of the email from WM.



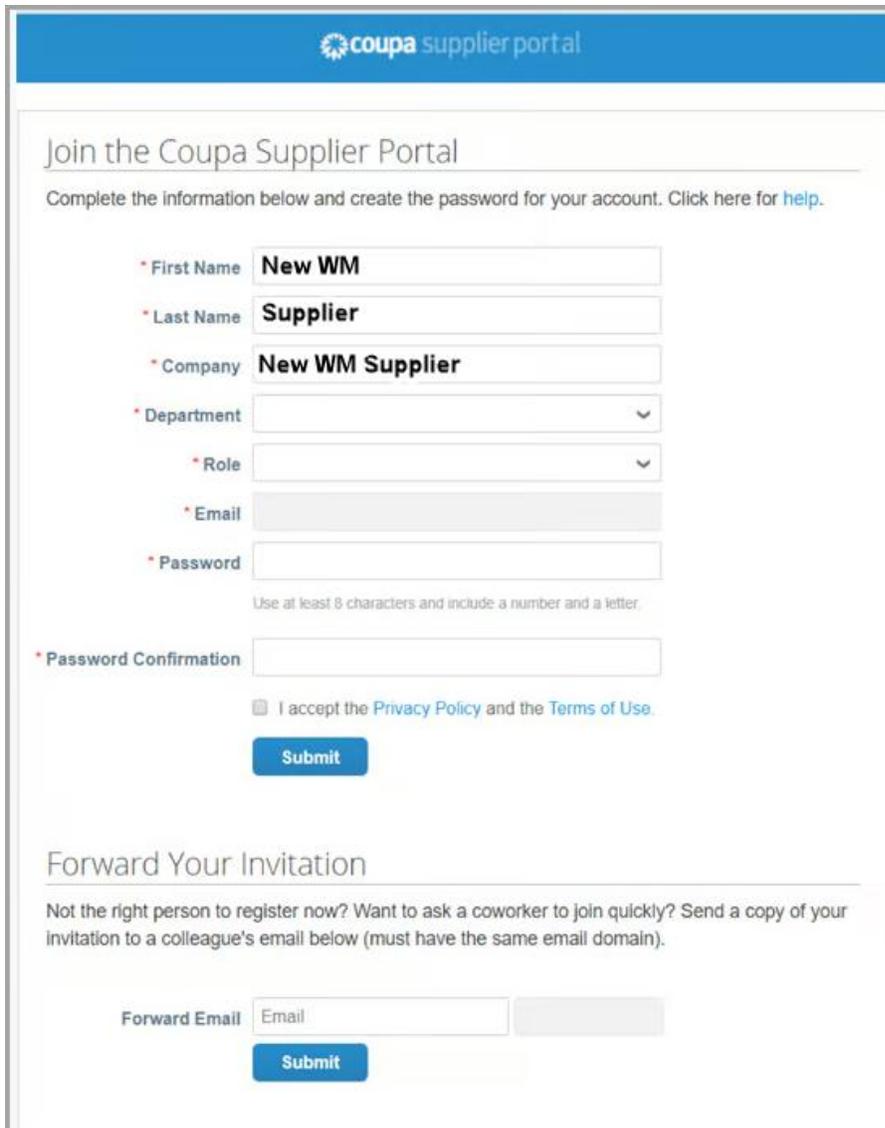
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Step 2: Join the Coupa Supplier Portal

To begin the registration process, you will be prompted to enter your user information and create a password.

- Coupa allows for multiple users for each supplier, so no need to share usernames and passwords
- If you are not the correct contact for registration, you can forward to another coworker
- Read and review the Privacy Policy and Terms of Use, if you agree and accept these terms, click on the box
- Click Submit to login to Coupa

Note: If you get a notice for 2-factor authentication, click “No.”



The screenshot shows the 'Join the Coupa Supplier Portal' registration form. At the top, there is a blue header with the Coupa logo and 'supplier portal' text. Below the header, the title 'Join the Coupa Supplier Portal' is followed by a sub-header 'Complete the information below and create the password for your account. Click here for help.' The form contains several input fields: 'First Name' (filled with 'New WM'), 'Last Name' (filled with 'Supplier'), 'Company' (filled with 'New WM Supplier'), 'Department' (dropdown menu), 'Role' (dropdown menu), 'Email' (greyed out), and 'Password' (with a note: 'Use at least 8 characters and include a number and a letter'). Below these is a 'Password Confirmation' field and a checkbox for 'I accept the Privacy Policy and the Terms of Use'. A blue 'Submit' button is located below the checkbox. Below the registration form, there is a section titled 'Forward Your Invitation' with the text 'Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain)'. This section includes a 'Forward Email' label, an 'Email' input field (greyed out), and another blue 'Submit' button.

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Step 3:

Once you've created an account, you can set up a Legal Entity to enable electronic invoicing.

1. Click on "Setup" tab in the upper right side of the page.
2. Click on "Admin" tab on the menu bar.
3. Click the "Legal Entity Setup" from the choices shown on the left.

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text "coupa supplier portal", and user information: "LINDA", "NOTIFICATIONS 2", and "HELP". Below the header is a blue navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, Sourcing, Add-ons, and Setup. A red arrow labeled "1" points to the "Setup" tab. Below the blue bar is a white navigation bar with tabs: Admin, Legal Entity Setup, and Connection Requests. A red arrow labeled "2" points to the "Admin" tab. The main content area is titled "Admin Users" and features an "Invite User" button. On the left, there is a sidebar menu with options: Users, Merge Requests, and Legal Entity Setup. A red arrow labeled "3" points to the "Legal Entity Setup" option. The main content area contains a table with columns: Users, Permissions, and Customer Access. The table lists a user named Denis Dikarev with email ddikarev@wm.com and status "Deactivated". A red arrow labeled "3" points to the "Activate User" button next to the user's name.

Users	Permissions	Customer Access
Denis Dikarev ddikarev@wm.com Status: Deactivated	ASNs Admin Business Performance Catalogs Community Invoices Order Changes	None selected

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Step 4:

Where's your business located?

Enter your Legal Entity Name and the Country where it is located.

Click **Continue**.

Note: Hints are provided on the bottom left of your Coupa screen.

Where's your business located? ×

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

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Step 5:

Tell your customers about your organization.

You will only need to fill out the fields with the red asterisk* and your Tax details.

Once this information is complete, click **Save & Continue**.

Note: The “Use this address for Remit-To” and “Use this for Ship From,” boxes are auto-checked. If you need to add a different address, you will need to un-check them manually.

Tell your customers about your organization

Which customers do you want to see this?

- All
- Waste Management Dev - Testing Supplier Portal KB
- Waste Management - Testing Supplier Portal KB
- Waste Management - Kates Shop
- Waste Management - John's Icehouse
- Waste Management - Lindas Test Supplier

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

Country/Region

Tax ID

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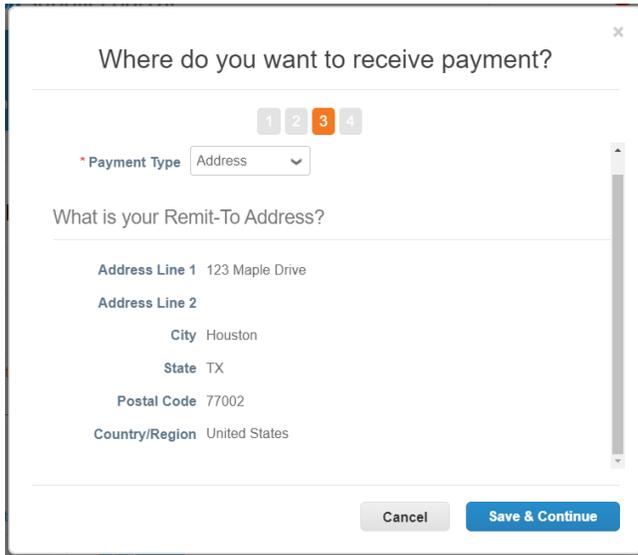


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Step 5A:

Where do you want to receive payment?

This information will be populated from Step 5 if “Use this address for Remit-To” was checked. Click **Save & Continue**.



The screenshot shows a modal window titled "Where do you want to receive payment?". At the top, there are four numbered tabs (1, 2, 3, 4), with tab 3 highlighted in orange. Below the tabs is a "Payment Type" dropdown menu set to "Address". The main section is titled "What is your Remit-To Address?" and contains the following information:

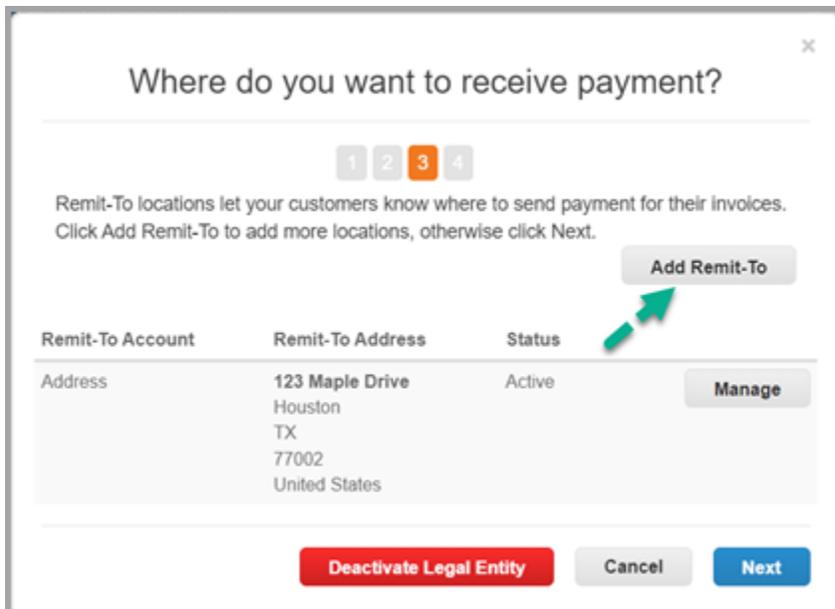
- Address Line 1: 123 Maple Drive
- Address Line 2: (empty)
- City: Houston
- State: TX
- Postal Code: 77002
- Country/Region: United States

At the bottom of the modal, there are two buttons: "Cancel" and "Save & Continue".

Step 5B:

Where do you want to receive payment?

Review the information listed. If everything is correct, click **Next**.



The screenshot shows a modal window titled "Where do you want to receive payment?". At the top, there are four numbered tabs (1, 2, 3, 4), with tab 3 highlighted in orange. Below the tabs, there is a paragraph: "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." Below this paragraph is an "Add Remit-To" button. A green arrow points to this button. Below the "Add Remit-To" button is a table with the following data:

Remit-To Account	Remit-To Address	Status	
Address	123 Maple Drive Houston TX 77002 United States	Active	Manage

At the bottom of the modal, there are three buttons: "Deactivate Legal Entity" (red), "Cancel", and "Next".

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Step 6:

Where do you ship goods from?

This information will be populated from the [Step 4](#) if the “Use this for Ship From” was checked. If everything is correct, click **Done**.

Where do you ship goods from?

1 2 3 4

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

Add Ship From

Title	Status	
123 Maple Drive Houston TX 77002 United States	Active	Manage

Deactivate Legal Entity Done

Step 7:

Setup Complete.

Congratulations, your setup is complete! This legal entity can now be used for new invoices.

Setup Complete

1 2 3 4

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