

Job Aid –Supplier: How to Navigate the CSP Coupa Tool

How to Navigate the Coupa Supplier Portal (CSP)

In this job aid:

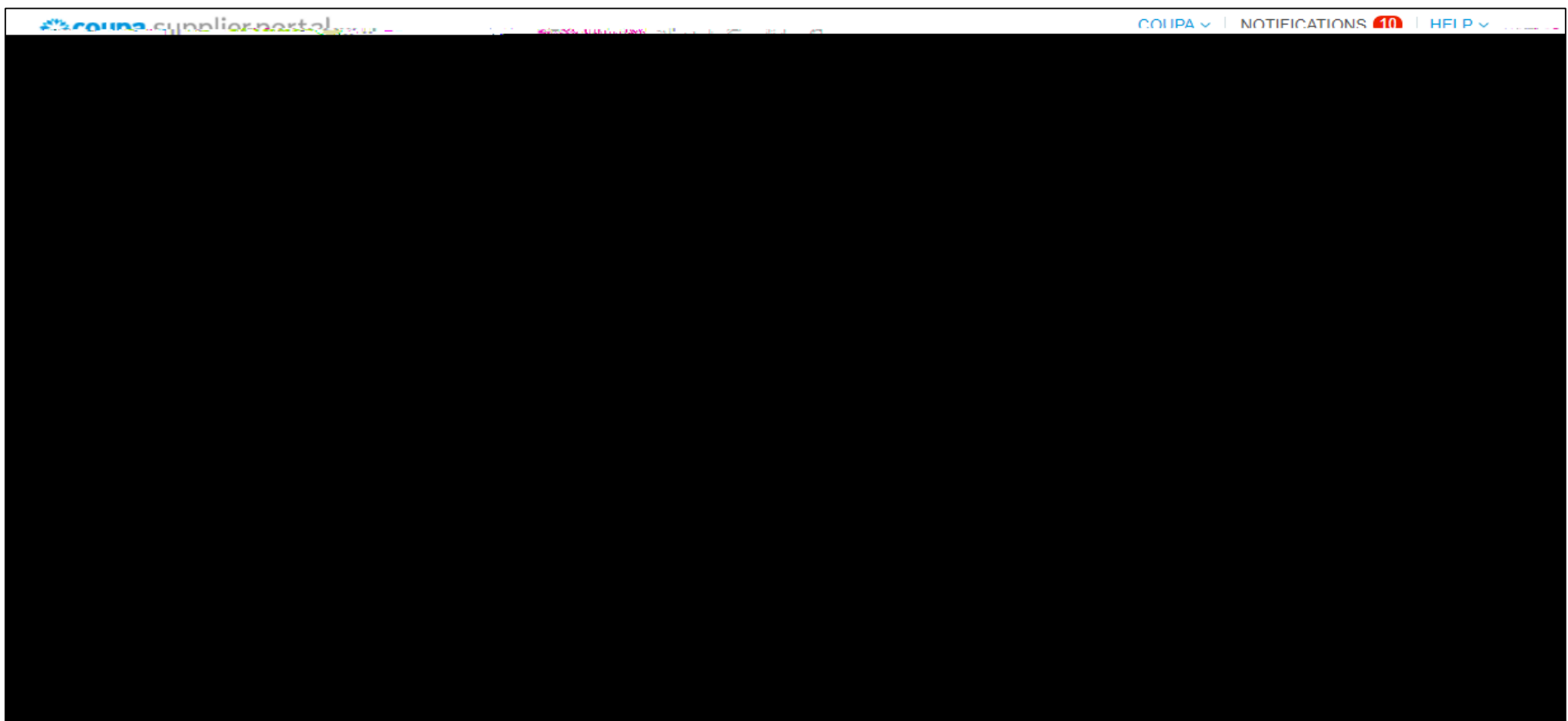
How to Navigate the Coupa Supplier Portal (CSP)

This job aid demonstrates how suppliers can navigate within the Coupa Supplier Portal (CSP). The Coupa Supplier Portal is a free tool for suppliers to manage company information, review purchase orders, create invoices, and view payment status. Suppliers will receive an email invitation from DaVita to sign up for CSP.

- Effective February 21, 2022, new DaVita policy requires Purchase Orders for ALL services and goods

Process Login

1. Login to the Coupa Supplier Portal (<https://supplier.coupahost.com>). On the homepage, ensure you are connected to DaVita under “Latest Customers”.



2. Once you are connected with DaVita, you can:
 - a) Manage company information
 - b) Review purchase orders
 - c) Create invoices
 - d) View payment status

Process

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Process– Create Invoices

1. You will need an open Purchase Order to process an invoice in CSP. In the Purchase Order screen, click Create Invoice.

2. Complete all required fields on the Invoice, including invoice # (Note: this must be a unique number) and invoice date.

3. Confirm all line item details. Values will populate from the Purchase Order. If you do not wish to invoice the full order, then you can change the quantity or price.

4. Click Submit to send the invoice to DaVita.

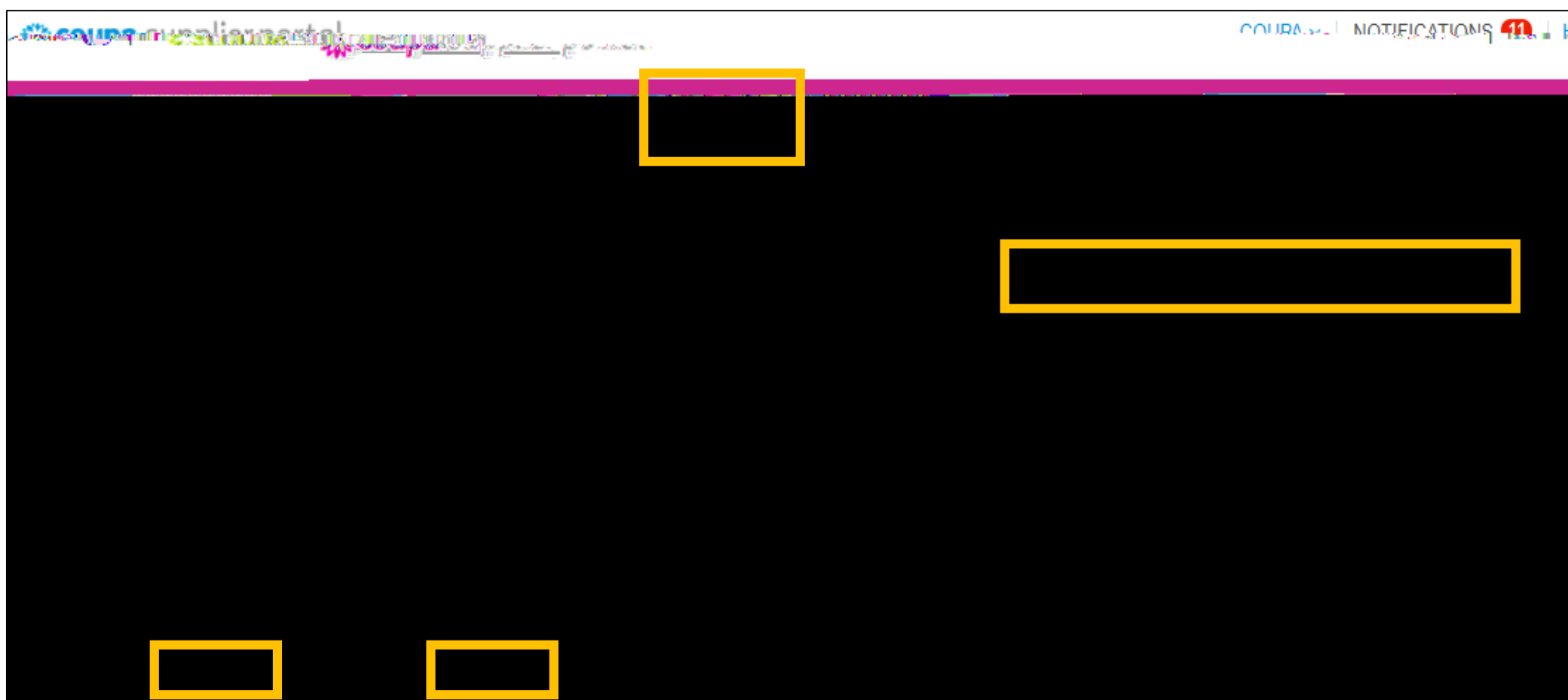
*For additional details on how to submit invoices via the Coupa Supplier Portal, please see the Job Aid titled

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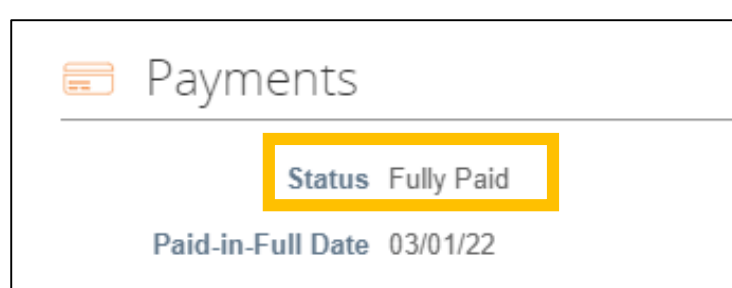
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Process– View Payment Status

1. Navigate to the Invoices tab to review all Invoices that you have sent DaVita.
2. Make sure that “DaVita Inc” is the Selected Customer.
3. On the Invoice table, review the Status to determine if the invoice was Approved. (Note: Click the Invoice # to open and review invoice details).



4. To view Payment Status, scroll to the bottom of the invoice and review Payments



5. If you have a question regarding your invoice payment status, use the comments section to send a message to the DaVita requestor. By using the @ symbol, you may send targeted comments to DaVita. (Note: The comment section is available on both Purchase Orders and Invoices).

