coupa supplier portal

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Select a guide below to jump to it. Each guide walks you through a key step of working with Ledcor in the Coupa Supplier Portal.

Need help? Book a Microsoft Teams meeting with Supplier Enablement Support.

Coupa Supplier Portal (CSP)

Supplier Registration to CSP Guide.

coupa supplier portal

LEDCOR GROUP

Step 1: Receive CSP Invitation by Email.

Ledcor will send you an invitation to join the CSP via email

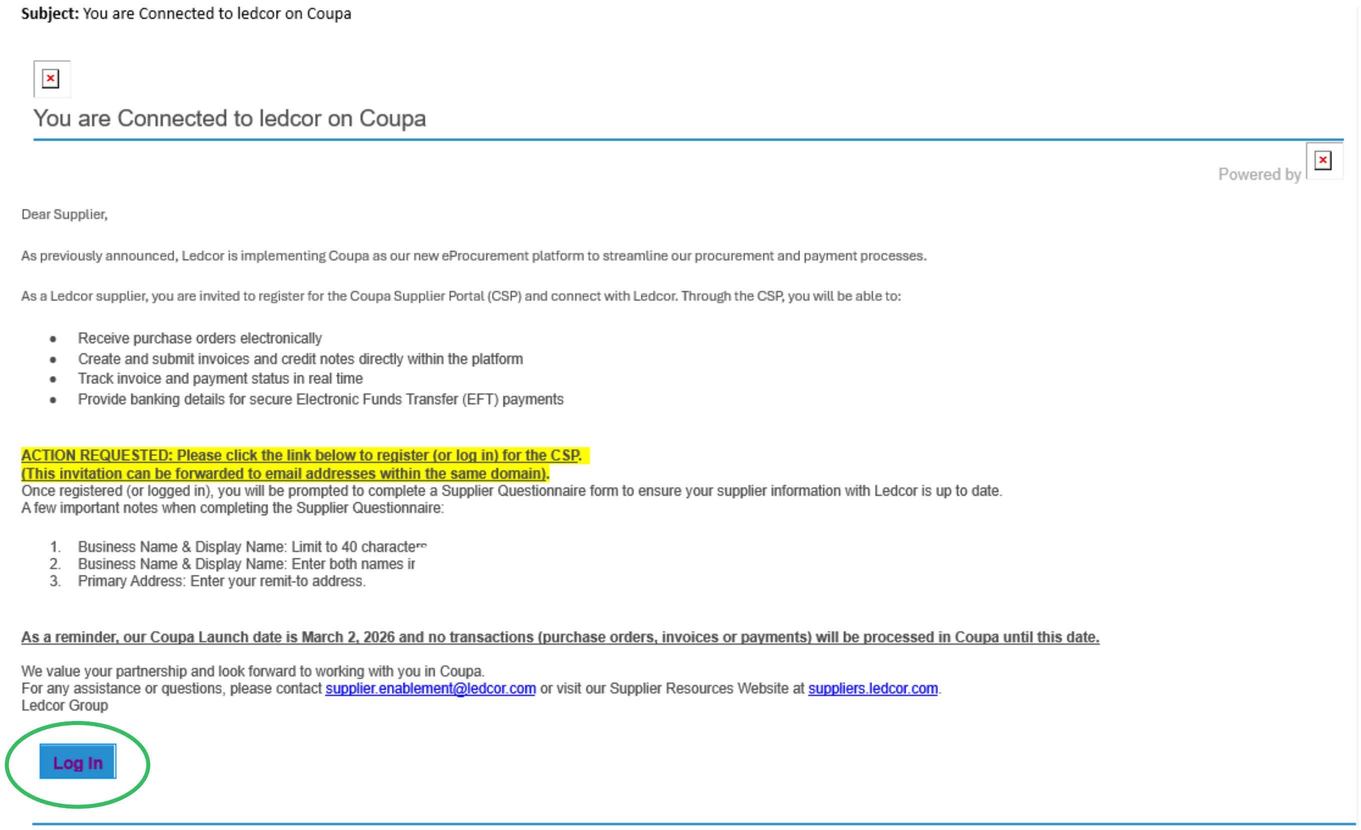
Allow emails from:
do_not_reply@supplier.coupahost.com

Check the SPAM and Junk folder in your mailbox

Search by Subject line: New CSP Supplier SIM Invitation

Click *Log In*.

If your invitation is tied to an existing CSP account, it will prompt you to log in instead.



Subject: You are Connected to ledcor on Coupa

You are Connected to ledcor on Coupa

Powered by

Dear Supplier,

As previously announced, Ledcor is implementing Coupa as our new eProcurement platform to streamline our procurement and payment processes.

As a Ledcor supplier, you are invited to register for the Coupa Supplier Portal (CSP) and connect with Ledcor. Through the CSP, you will be able to:

- Receive purchase orders electronically
- Create and submit invoices and credit notes directly within the platform
- Track invoice and payment status in real time
- Provide banking details for secure Electronic Funds Transfer (EFT) payments

ACTION REQUESTED: Please click the link below to register (or log in) for the CSP.
(This invitation can be forwarded to email addresses within the same domain).
Once registered (or logged in), you will be prompted to complete a Supplier Questionnaire form to ensure your supplier information with Ledcor is up to date.
A few important notes when completing the Supplier Questionnaire:

1. Business Name & Display Name: Limit to 40 characters
2. Business Name & Display Name: Enter both names ir
3. Primary Address: Enter your remit-to address.

As a reminder, our Coupa Launch date is March 2, 2026 and no transactions (purchase orders, invoices or payments) will be processed in Coupa until this date.

We value your partnership and look forward to working with you in Coupa.
For any assistance or questions, please contact supplier.enablement@ledcor.com or visit our Supplier Resources Website at suppliers.ledcor.com.
Ledcor Group

Log In

Step 2: Create an Account.

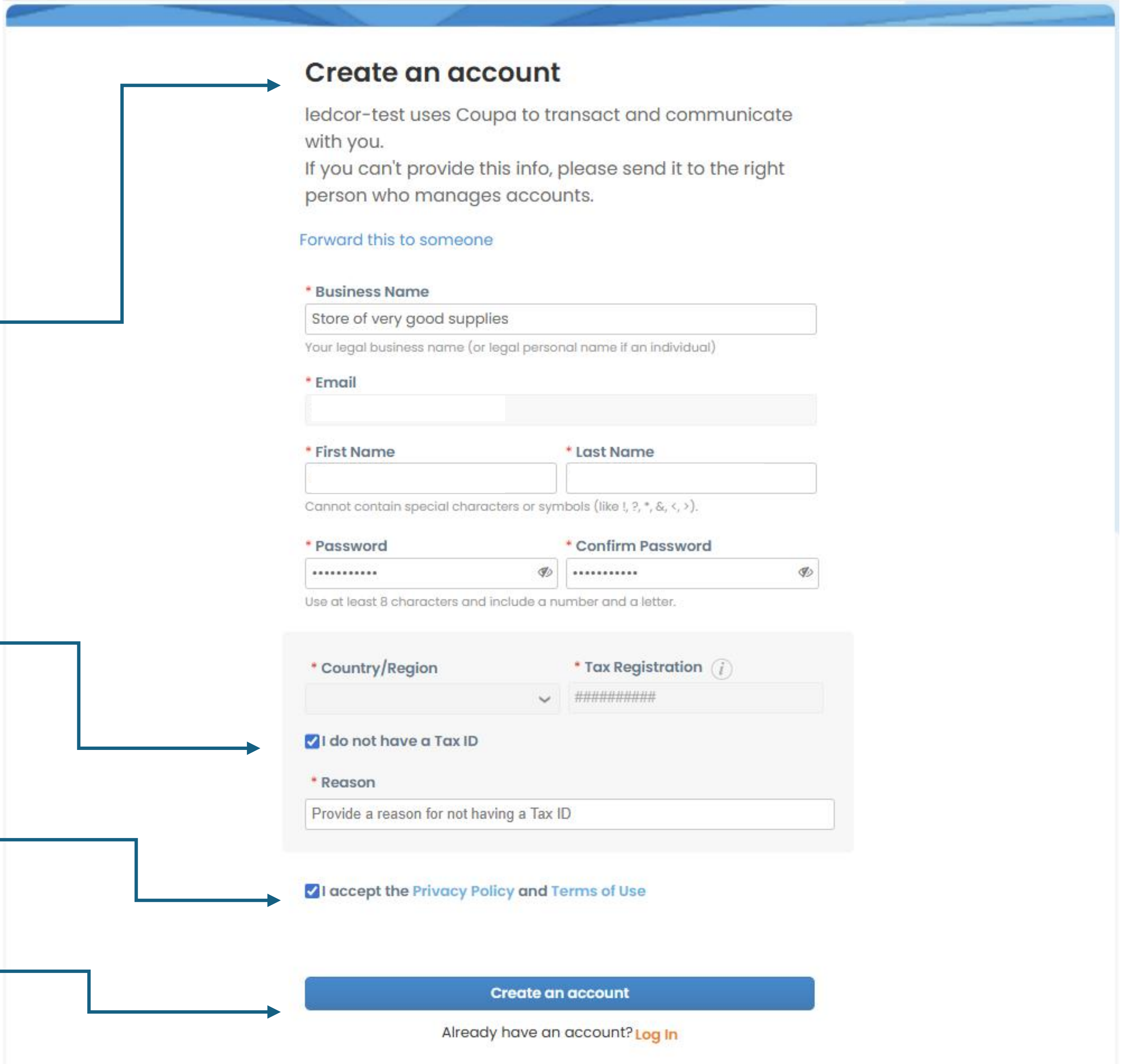
Note that the first person to create a CSP account will be defaulted as the admin. Once other accounts within your company join the CSP, the admin role can be assigned to someone else.

Complete your company information, ensuring all required fields marked with a red asterisk (*) are filled out.

If you don’t have a Tax ID, provide a reason for not having a Tax ID.

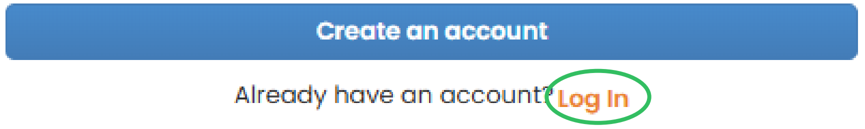
Accept the Privacy Policy and Terms of Use.

Click *Create an account*

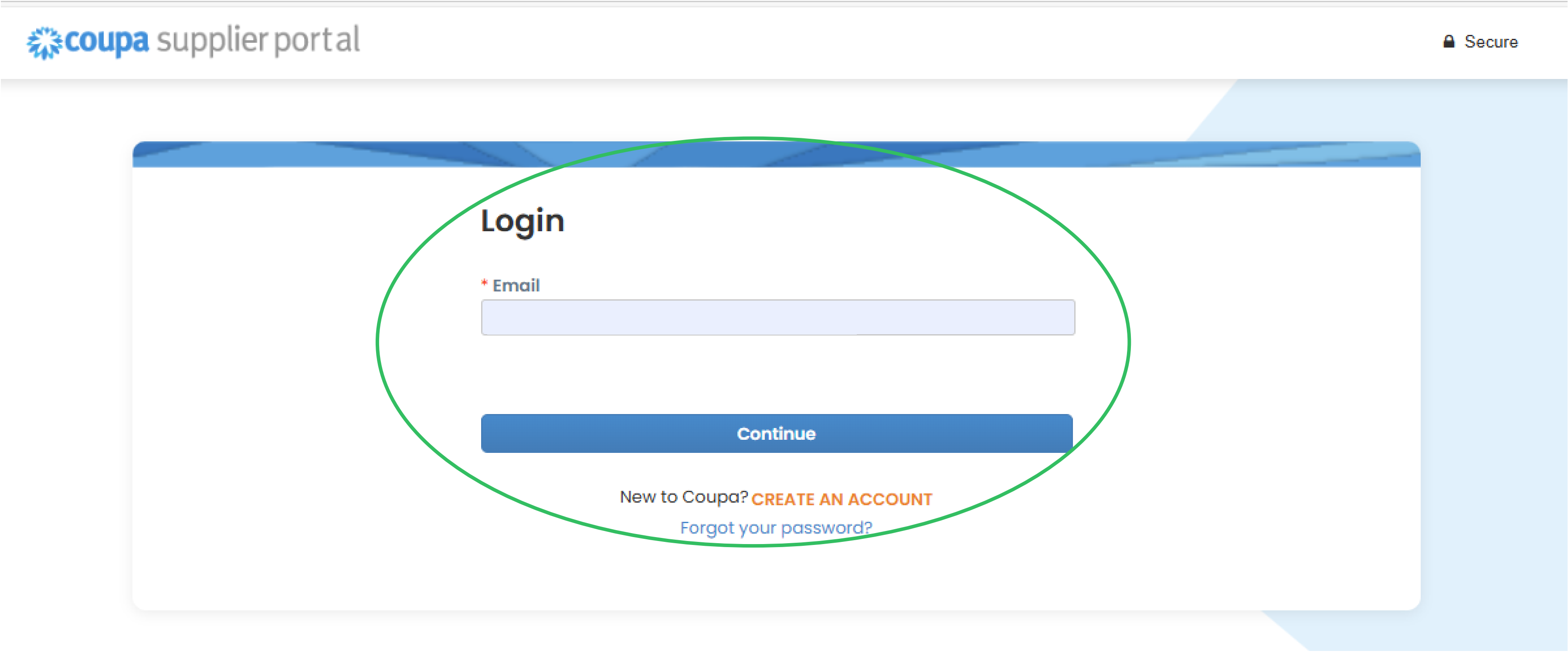


Step 2: Create an Account or Log In to an existing account

Under the Create an account button click *Log In*

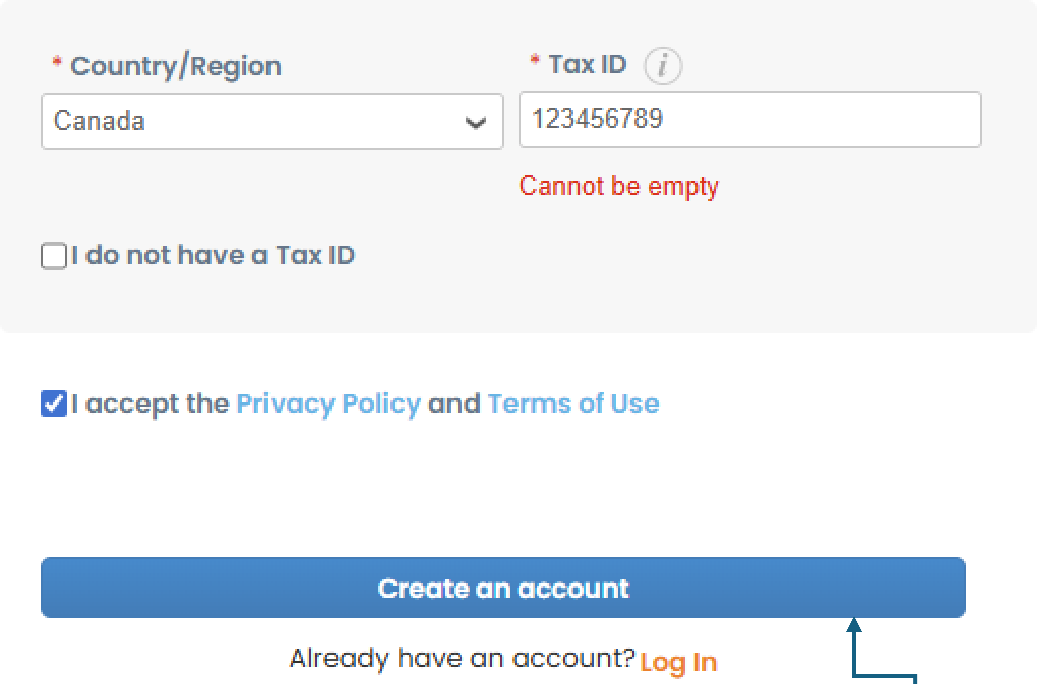


The next screen will open so you can type in your email address and password.

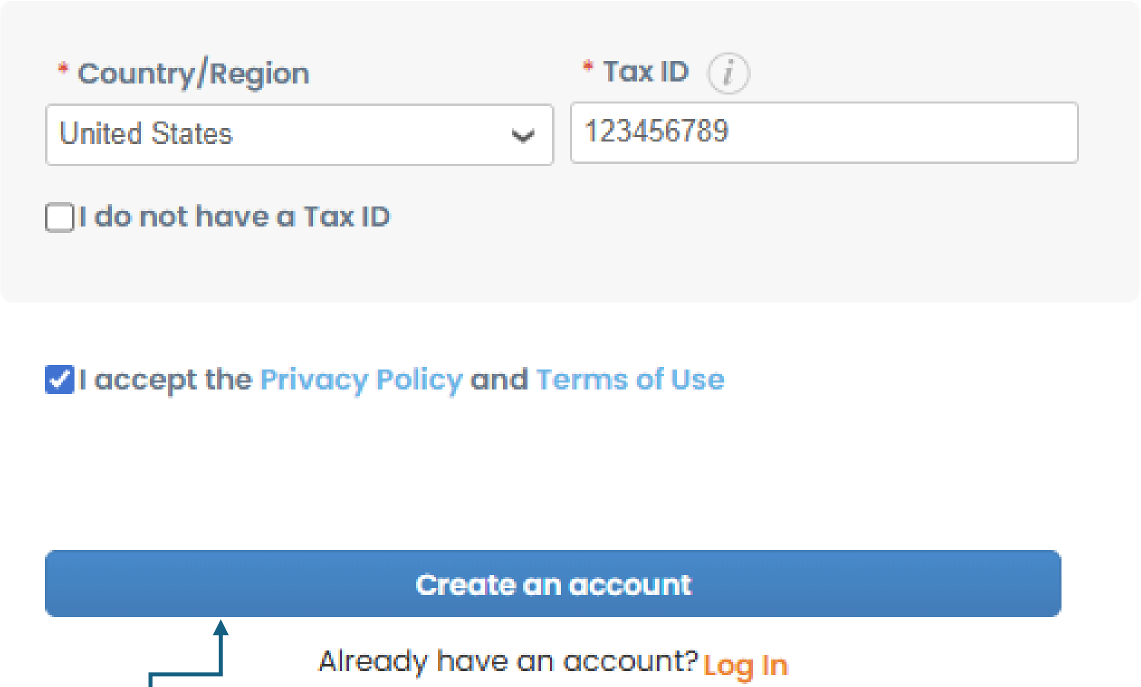


Step 3: Select your Country to fill out the Tax details

A Canadian business number (BN) or Social Insurance Number (SIN) for individuals, issued by the Canada Revenue Agency (CRA). A 9-digit number.



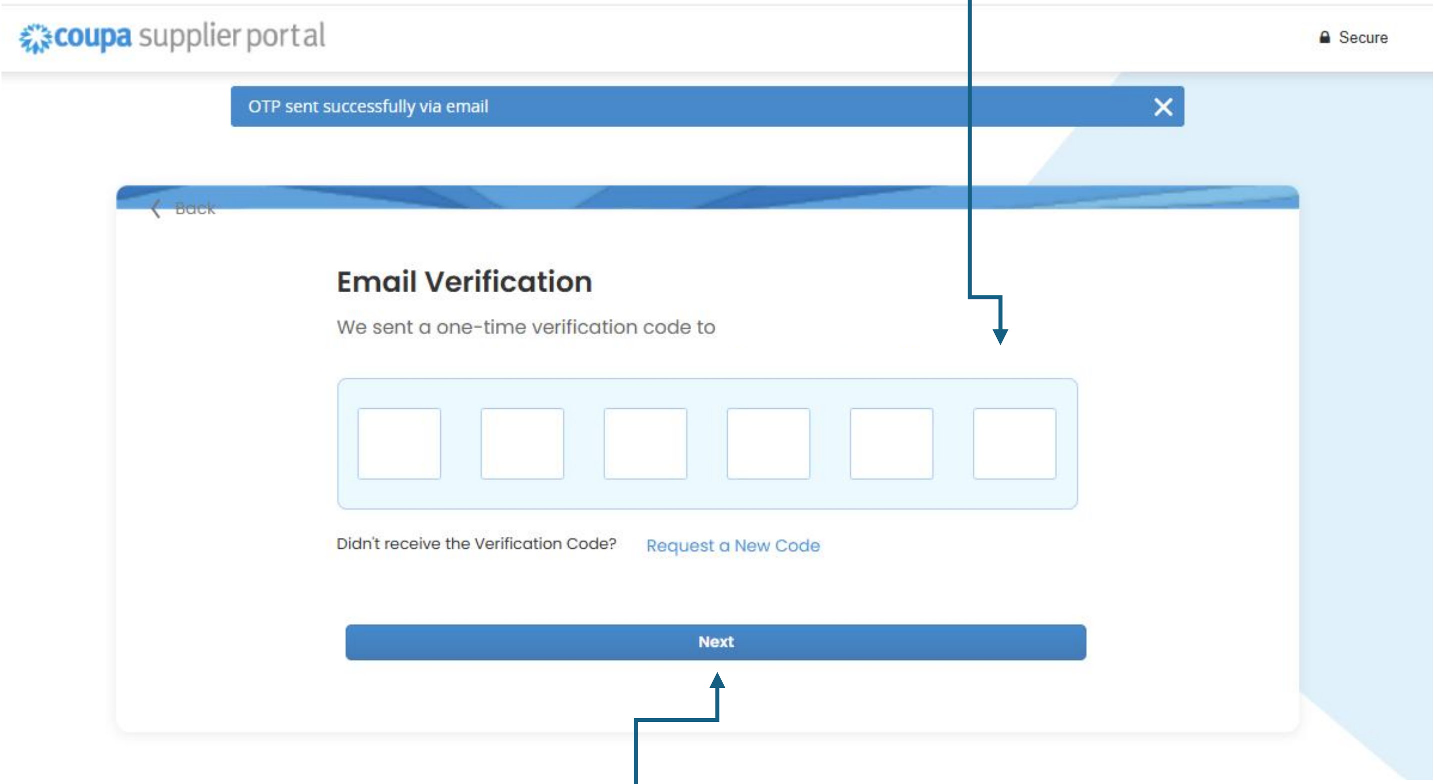
US companies: A 9-digit number, TIN (for companies), EIN (individuals – preferred), or SSN (individuals) issued by the IRS



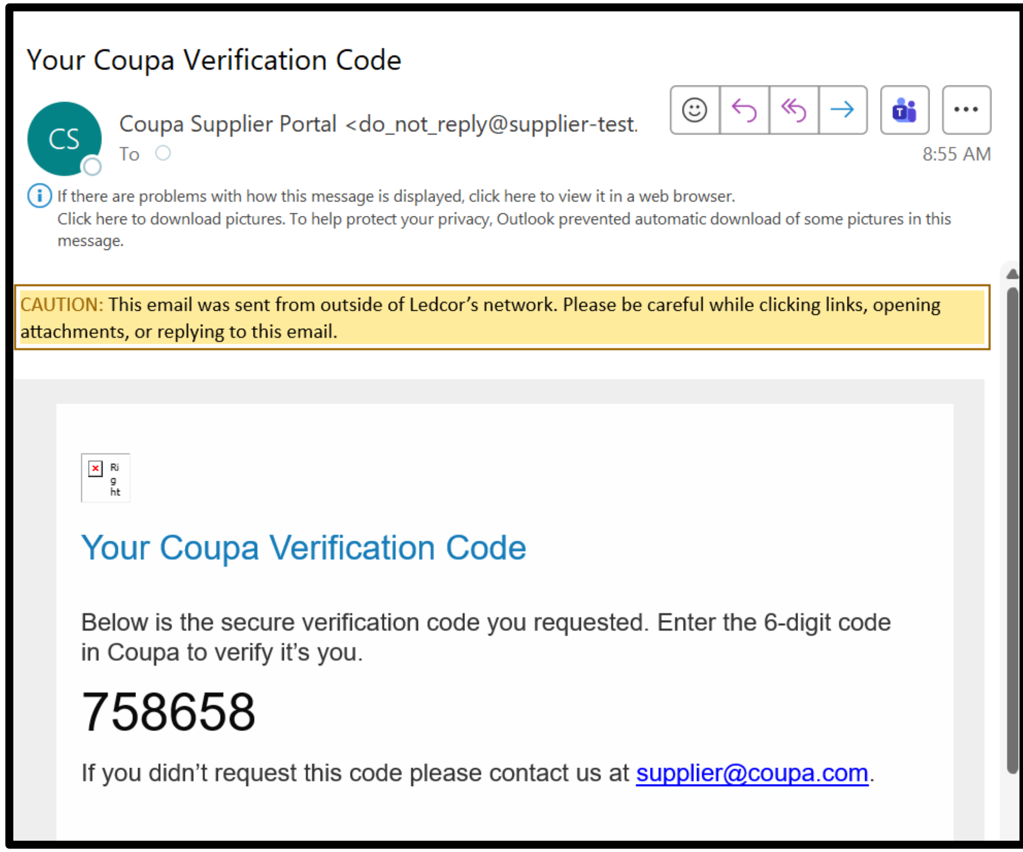
Click *Create an account*

Step 4: Get the Verification Code sent to your email.

Enter the verification code in the Coupa supplier portal

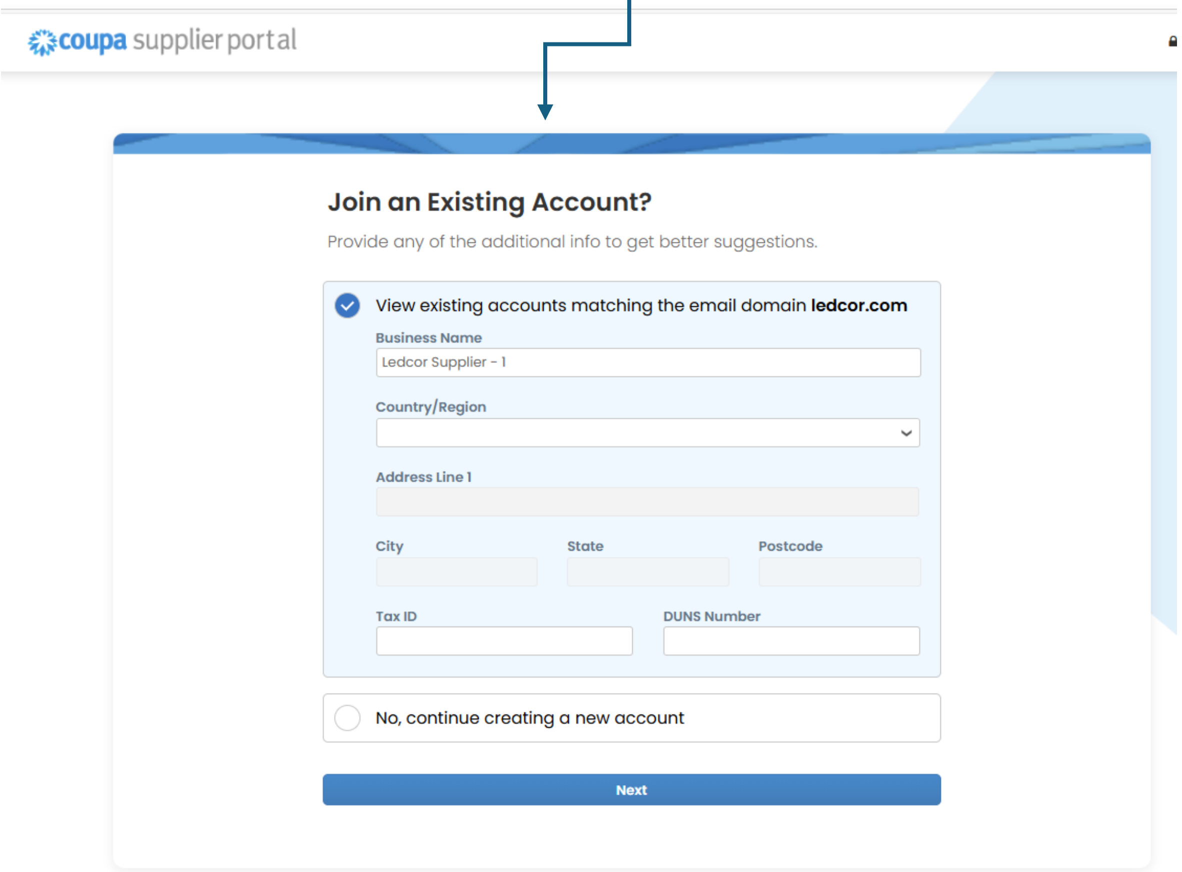


Click *Next*

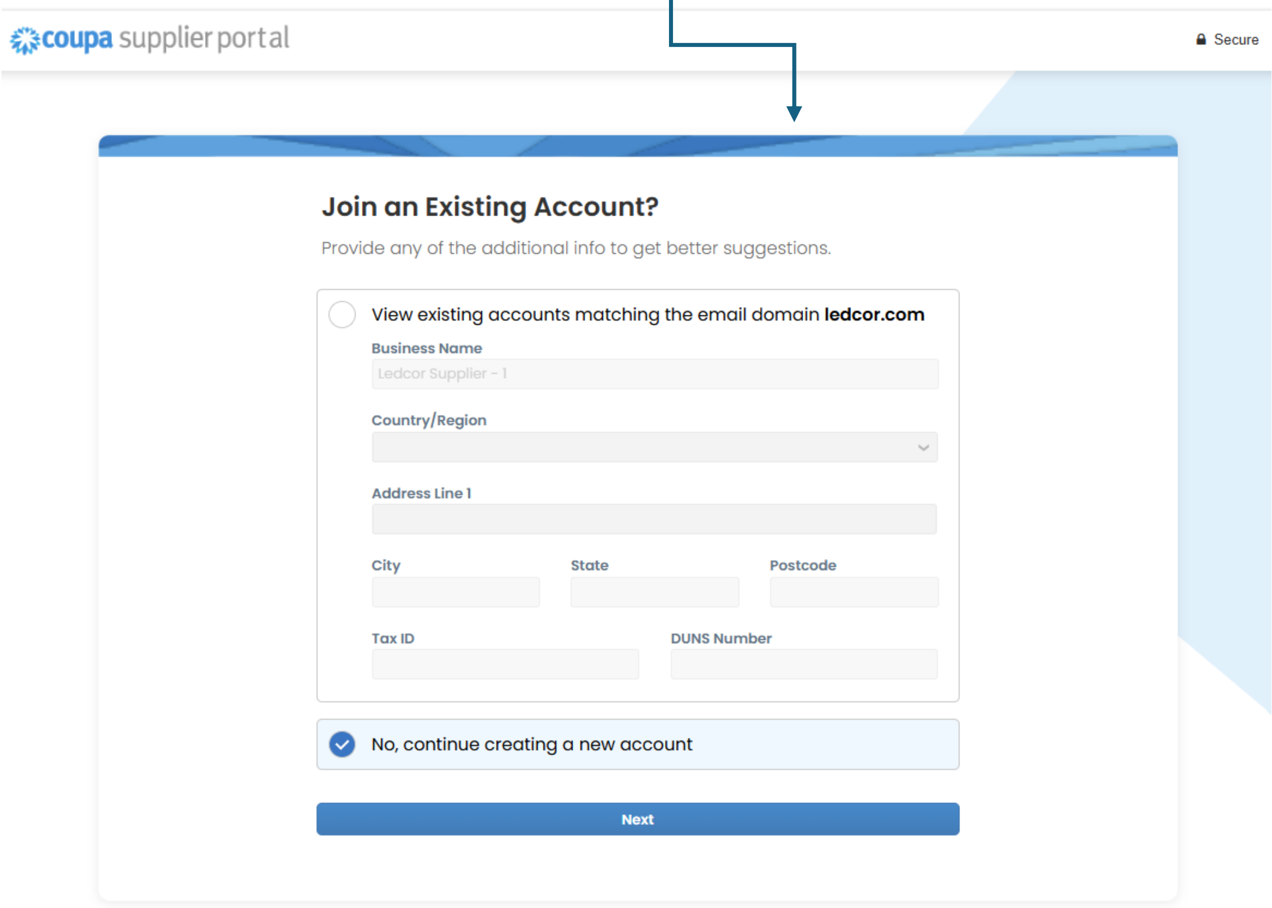


Step 5: Join an existing account

Select to view other CSP Accounts with the same email domain and join an existing CSP account instead of creating a new standalone account, generic email domains like Gmail, Yahoo, etc, will not show up.



Or select *No, continue creating a new account*, to create a new account.

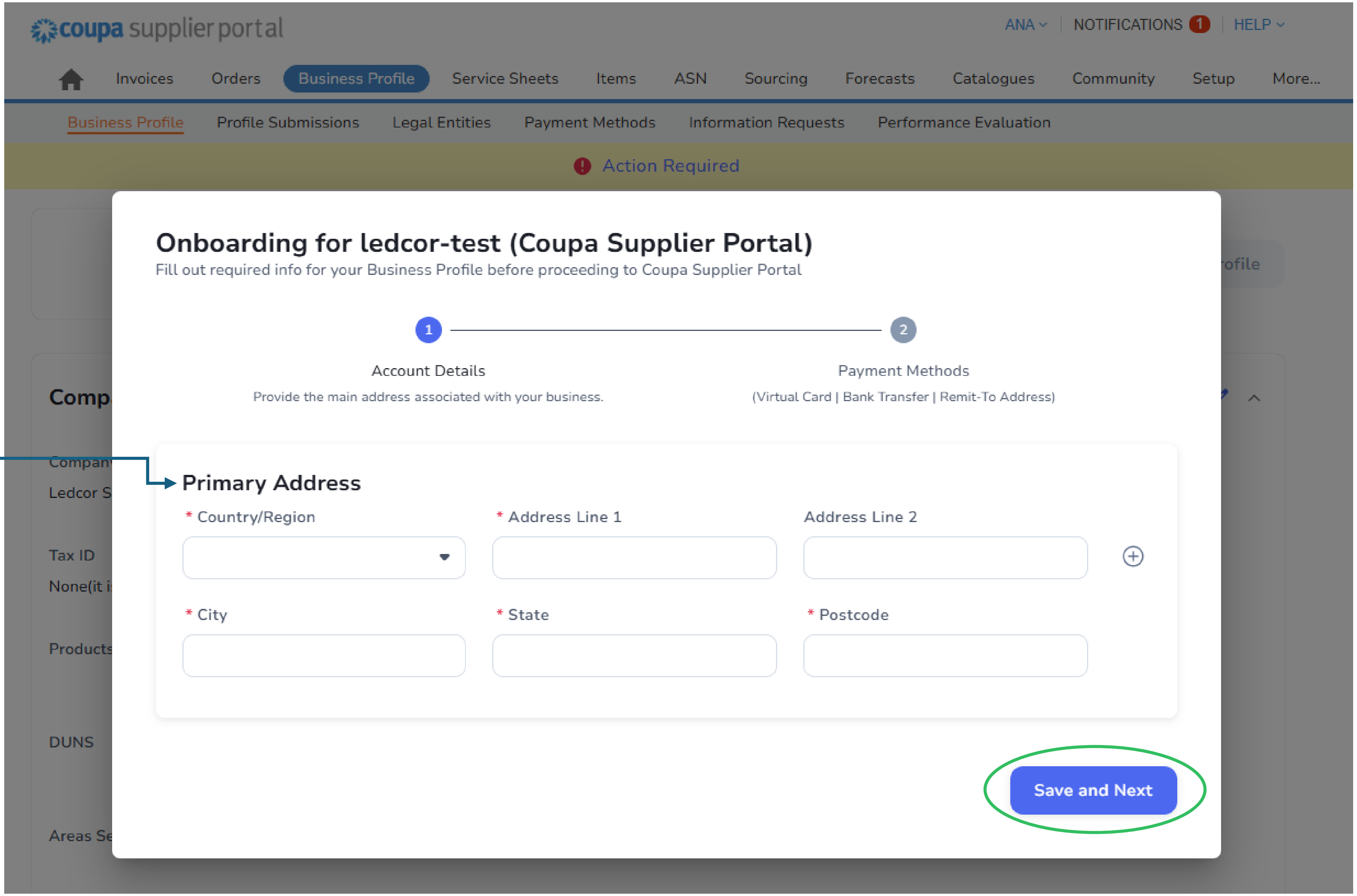


Step 6: Complete your company profile

You will be redirected to the CSP home page to complete your onboarding information, which will be saved to your Coupa account.

Enter the information for your primary address

Click *Save & Next*

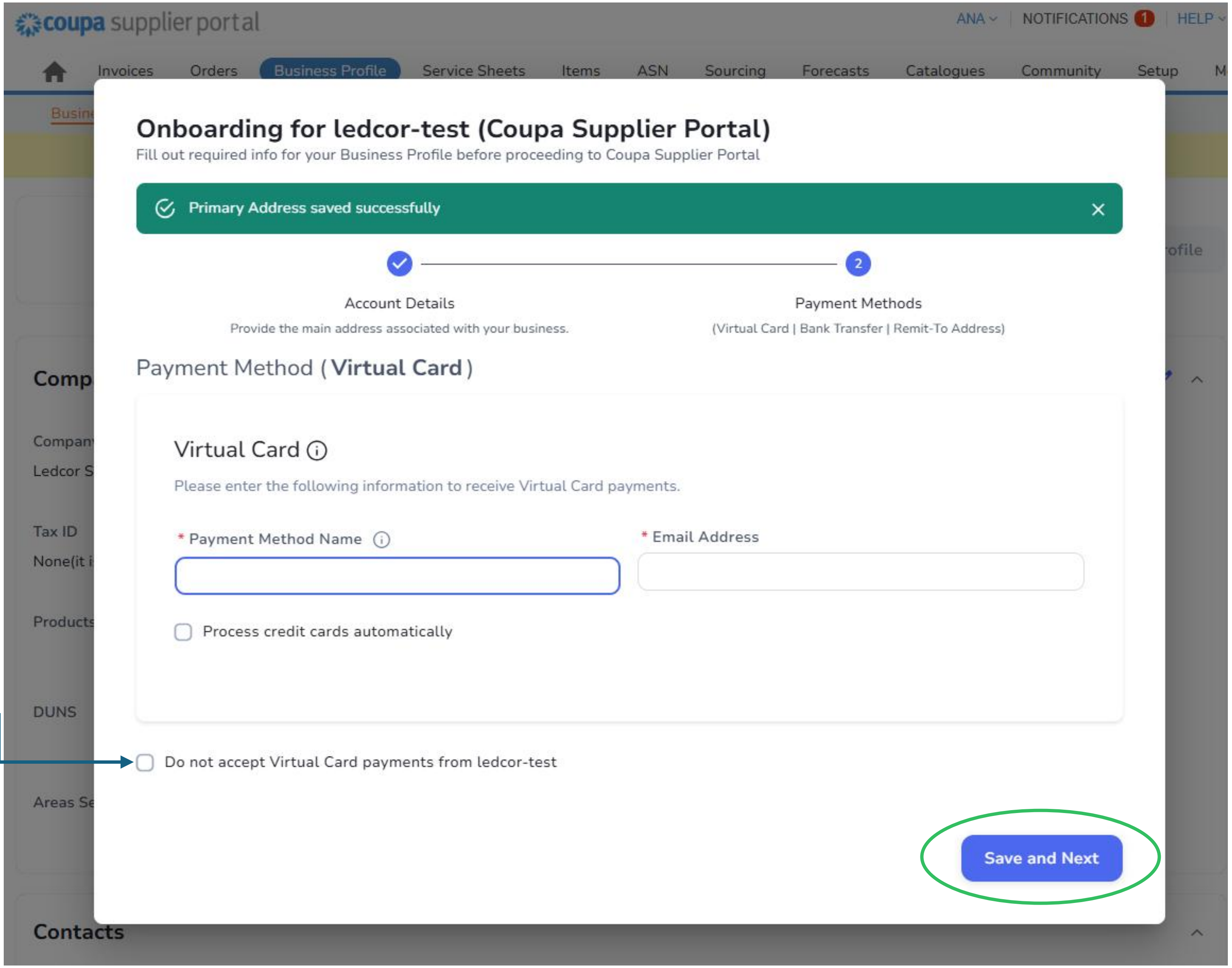


Step 7: Setup your payment options – Virtual Card

Ledcor recommends to enable EFT/ACH to streamline invoice payments.

Virtual Cards: To enable *Virtual Card* payments, type in your email address or complete steps to process Virtual Cards automatically by, for example linking your stripe account.

If you do not support Virtual Card payment method, you can click on the check box below *Do not accept payments from Ledcor*



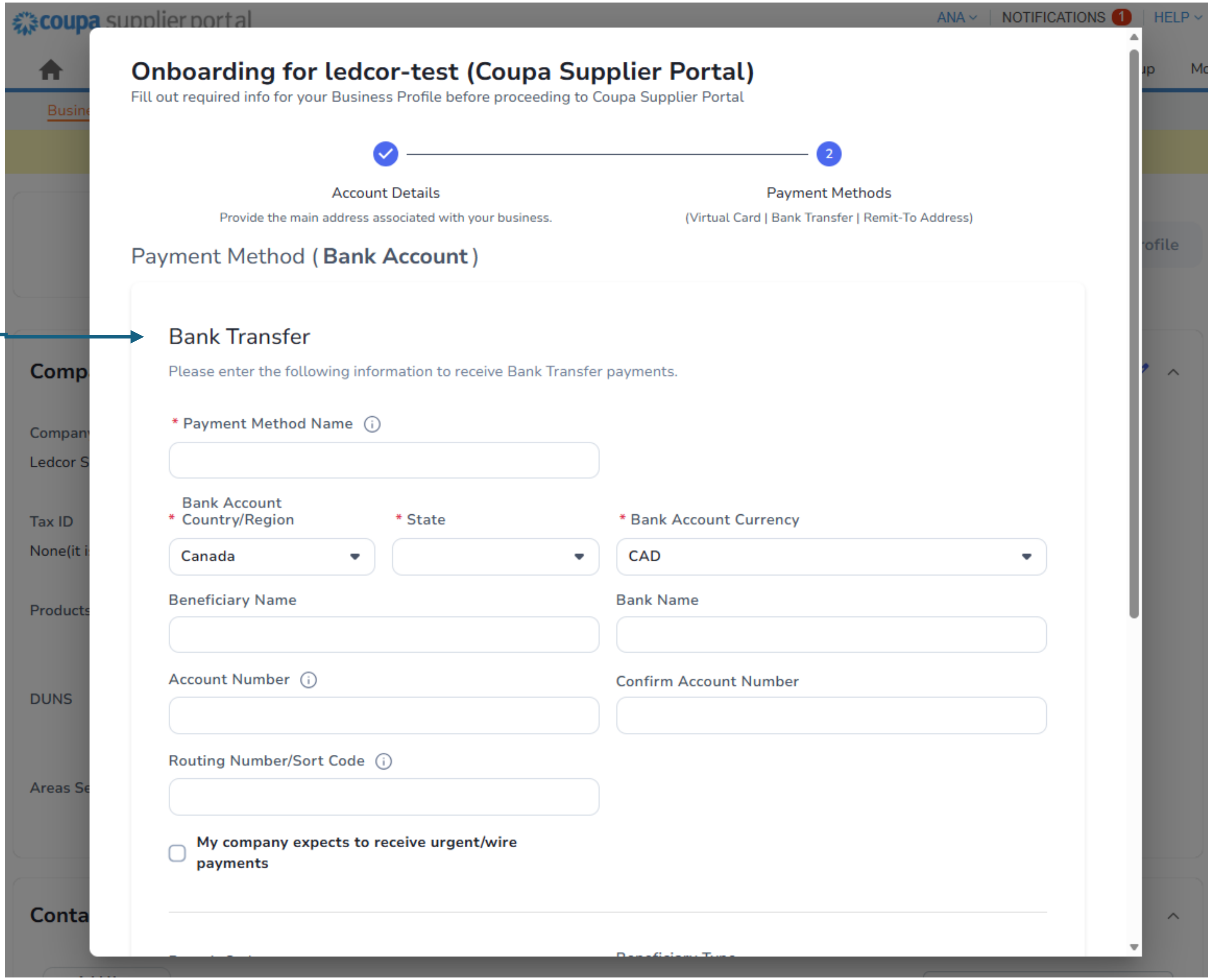
Click *Save & Next*

Step 7: Setup your payment options – Bank Transfer

Ledcor recommends to enable wire transfer via EFT/ACH to streamline invoice payments.

Bank Transfer: To enable *Bank Transfer* payments fill out the mandatory fields marked with a *.

Scroll down

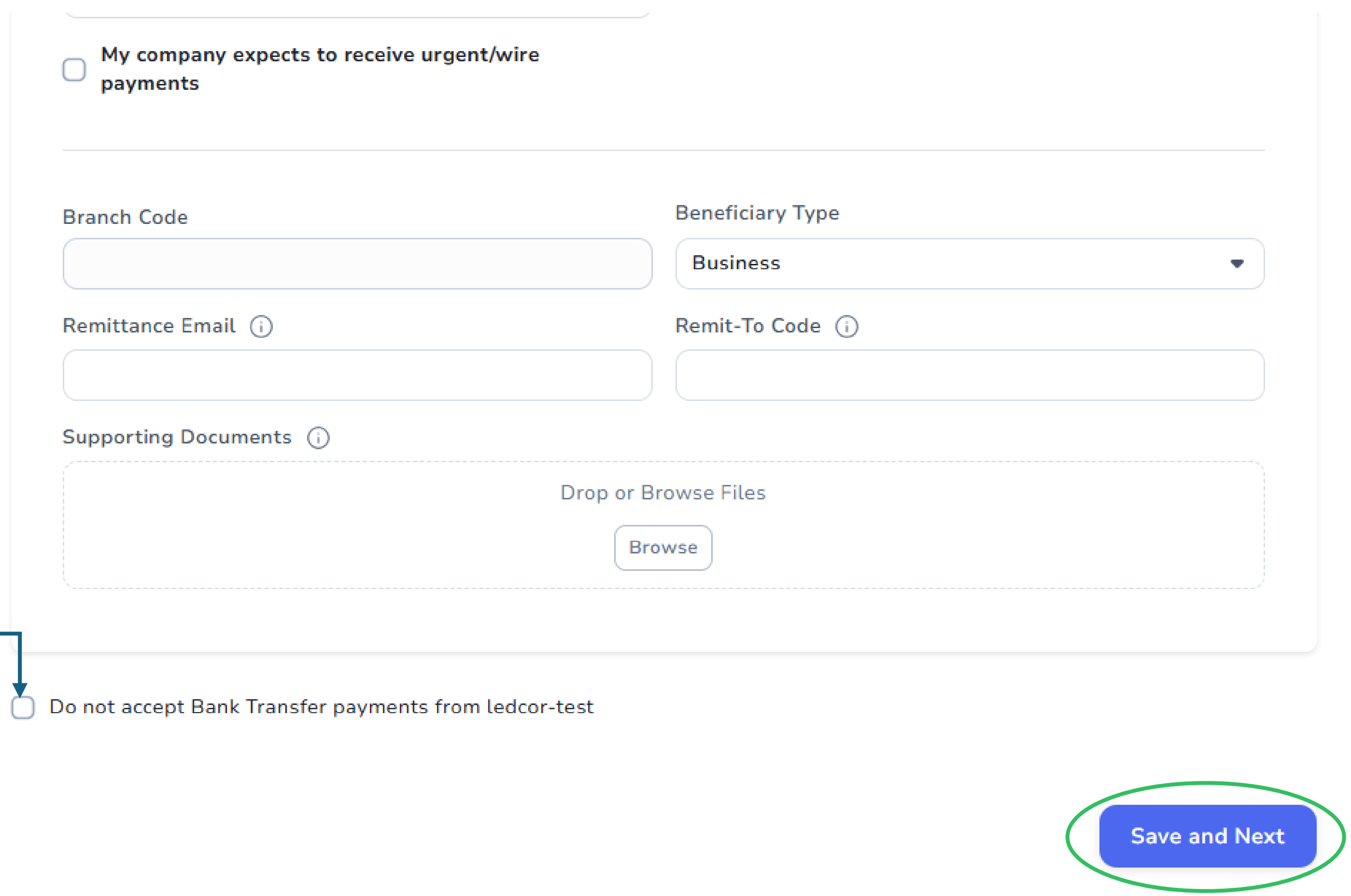


Step 7: Setup your payment options – Bank Transfer

You can fill out the details of your bank account to enable payments or come back later with all the information to setup your account for Bank Transfers.

If you do not support Bank Transfer payments, you can click on the check box *Do not accept Bank Transfer payments from Ledcor*

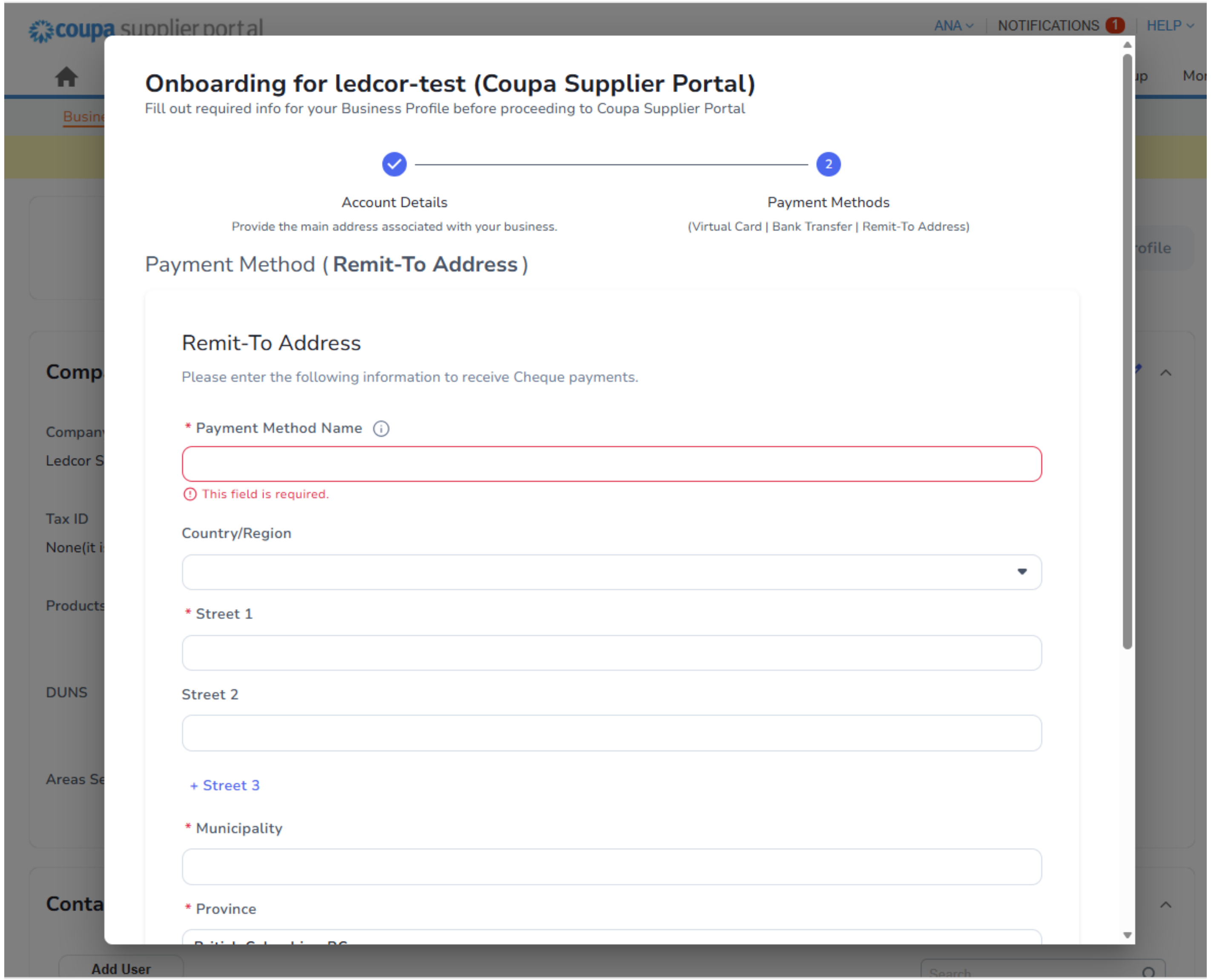
Click *Save and Next*



Step 7: Setup your payment options – Add Remit To Address for Check payments

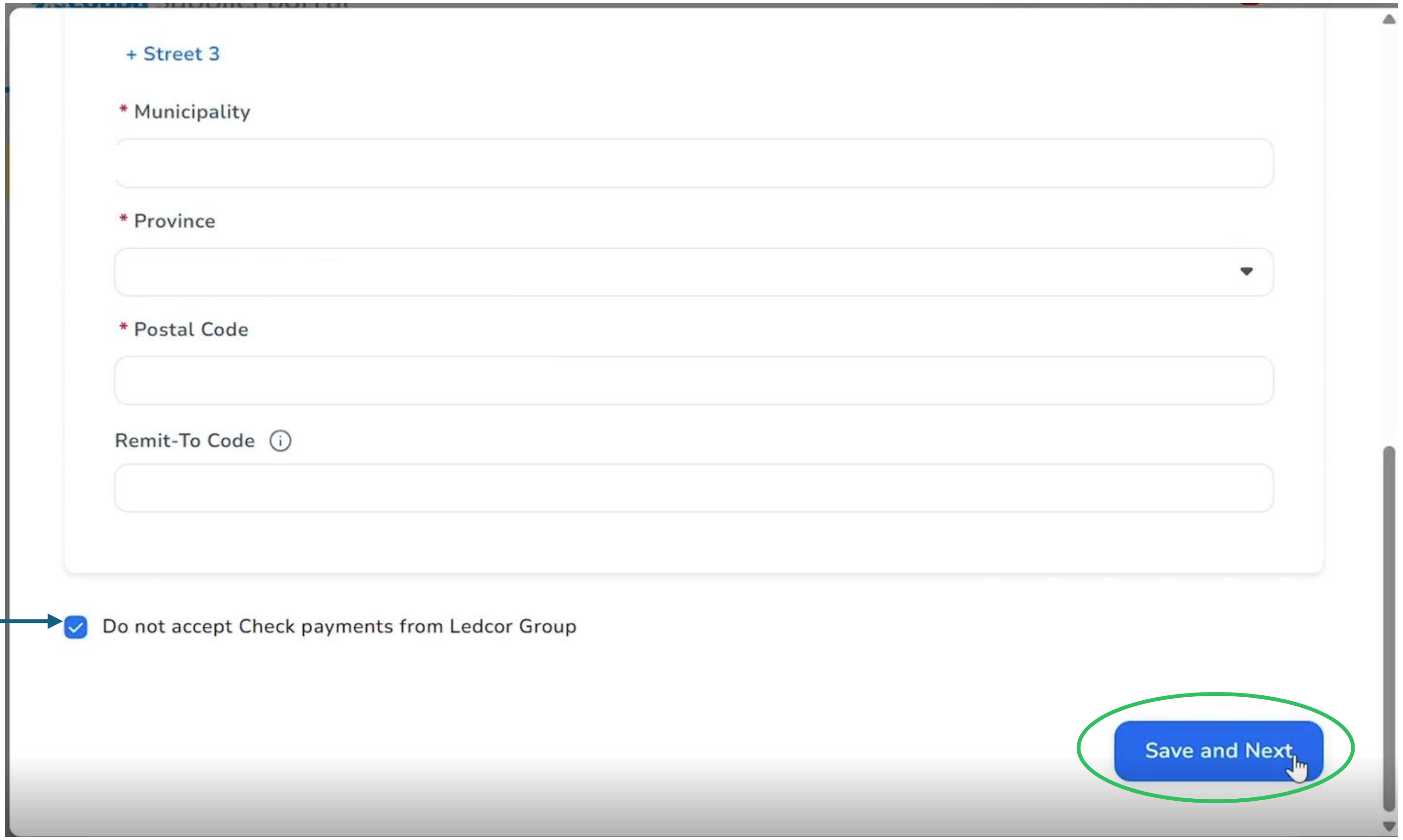
Check Payments: To enable *Check* payments fill out the mandatory fields marked with a * with your Legal Address.

Scroll down



Step 7: Setup your payment options – Add Remit To Address for Check payments

If you do not support Check payments, you can click on the check box *Do not accept Check payments from Ledcor*



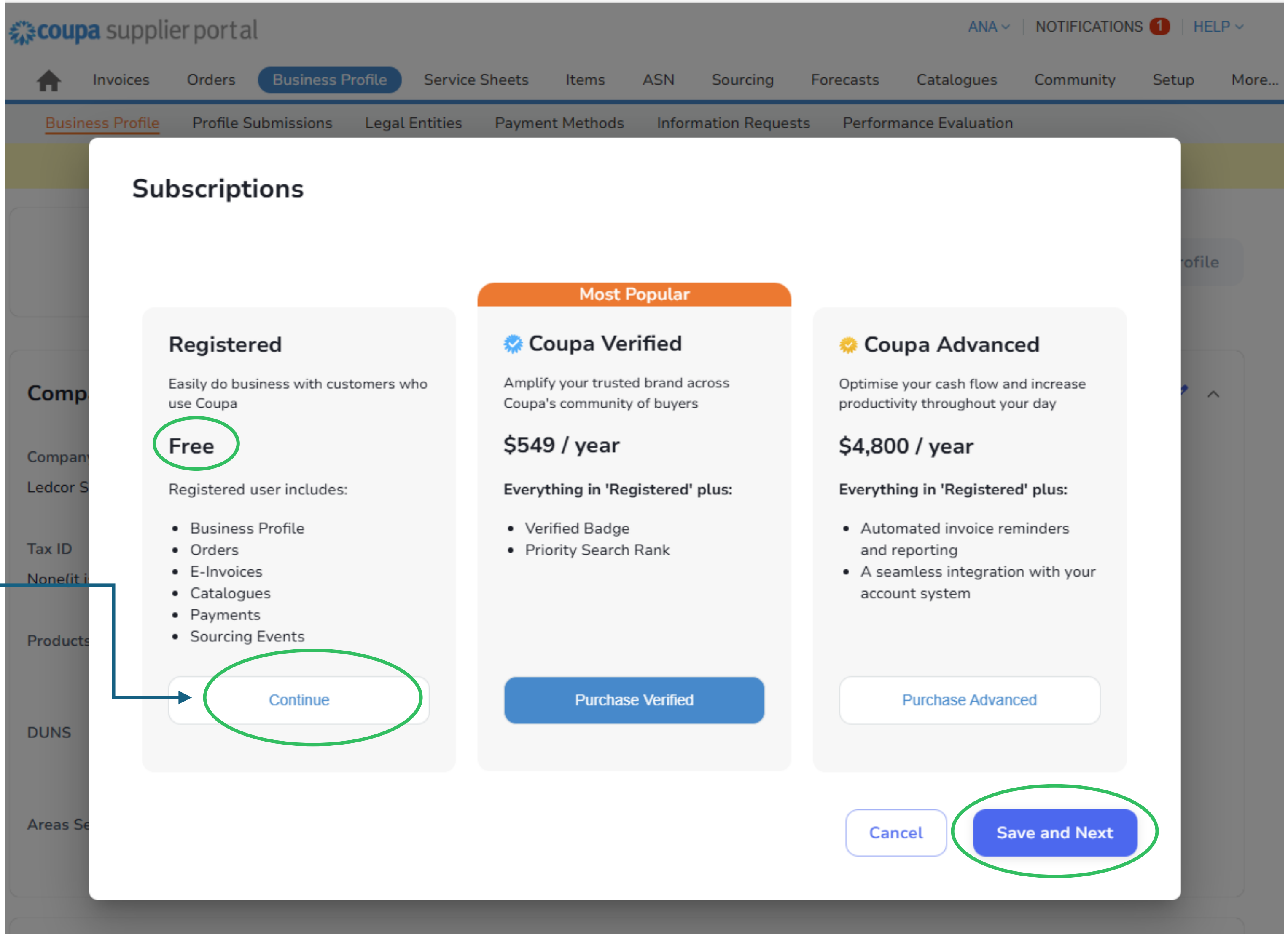
Click *Save and Next*

Step 8: Select a Subscription – Free version available

While Coupa offers optional subscription plans, these are not required to do business with Ledcor.

The Coupa Supplier Portal (CSP) is completely **free** for all suppliers.

To join the free version of Coupa, click *Continue* on the left side option.



Click *Save and Next*

Thank you for Registering in CSP!

If you need any additional support, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

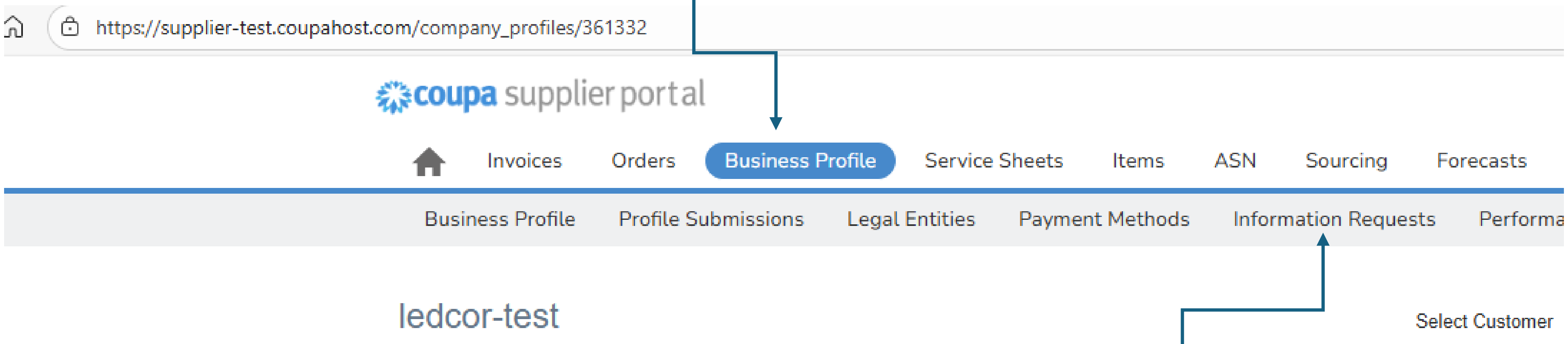
[Supplier Enablement Support]

Coupa Supplier Portal (CSP)

Supplier Form 1B Guide

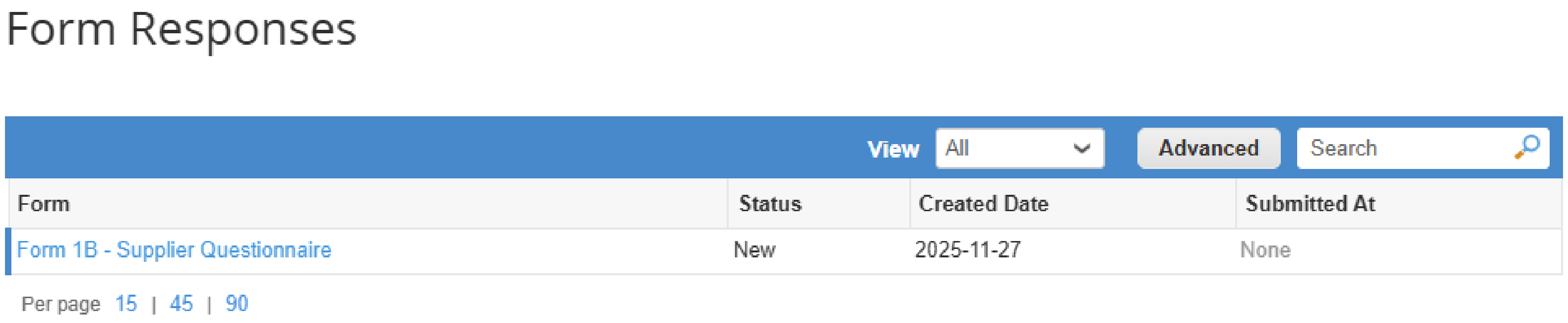
Within your CSP account:

1. Click on *Business Profile*



2. Click on *Information Requests*

3. The next screen is Form Responses: Click *Form 1B – Supplier Questionnaire*



Ledcor's system filled out some information, feel free to add or overwrite inaccurate details.

Note that ***Business Name** must be same as the company Legal Name, cannot exceed 40 characters and filled out in upper case.

If your Business Name is longer than 40 characters, add the rest of name in Address line 1 - ***Street Address**.

We have auto-filled some information from your Public Profile.

View All Responses

Form 1B - Supplier Questionnaire v010826

This form is completed by a first-time supplier to provide all the necessary information for Ledcor to onboard the supplier to Coupa and process invoices. (Updated 01-2026)

Supplier Information

Store of very good supplies

* **Ledcor's Business Partner Code of Conduct**

☑

I have read and acknowledge Ledcor's Business Partner Code of Conduct & Ethics. Click here to access: Business Partner Code of C

You must fill out all the mandatory fields marked with an *

Company Information & Contact

* **Business Name**

Enter your company's legal name in UPPERCASE and limit to 40 characters. If company legal name exceeds 40 characters, enter the remaining characters in the "Street Address" field

* **Display Name**

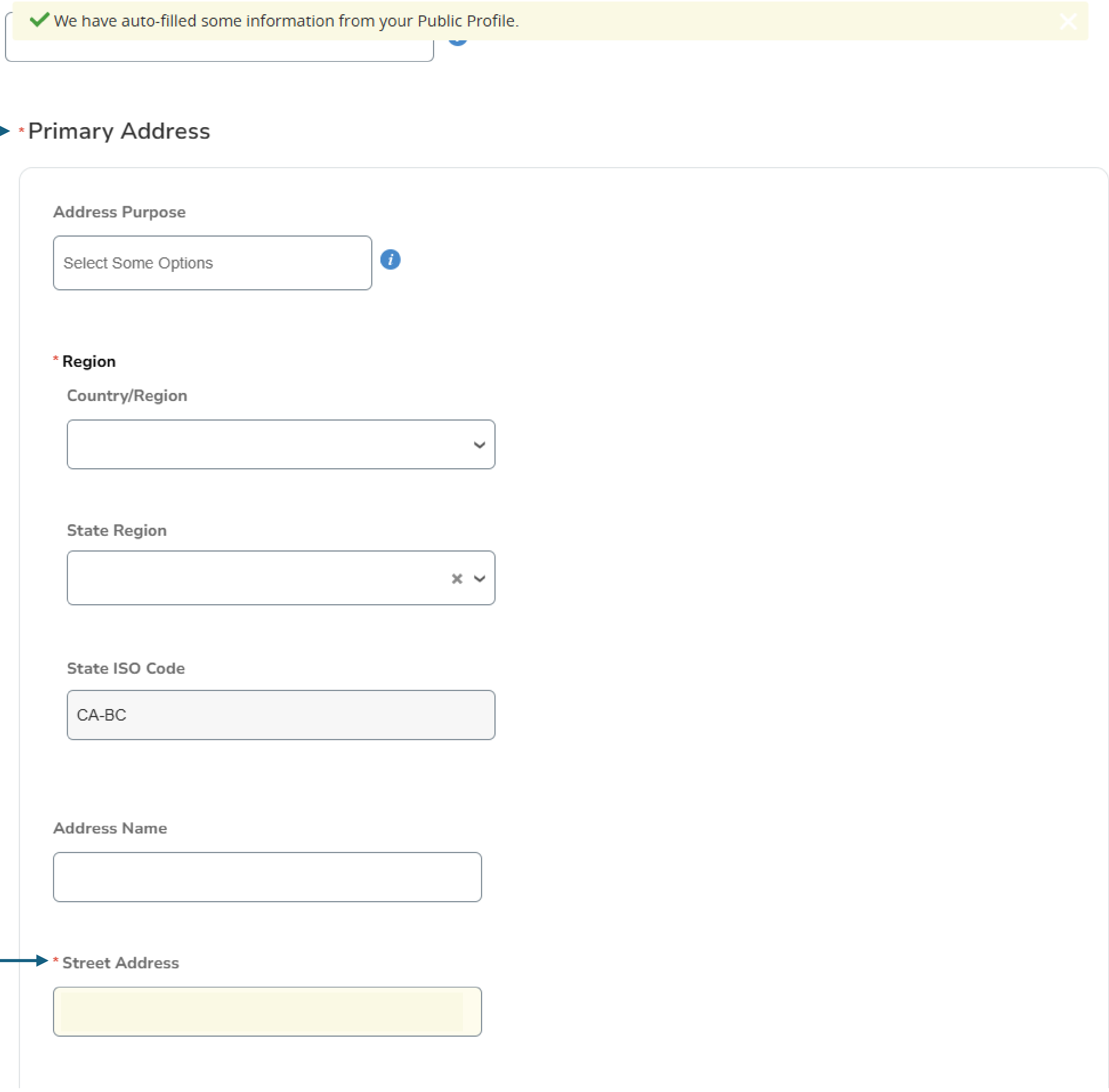
Enter your company's trade or business name in UPPERCASE and limit to 40 characters.

***Display Name** can be the same as the company Legal Name, or it can be the name that Ledcor would identify with your company.

In Section ***Primary Address**

Enter your Remit To address, here
Remit To address is your company Legal Address

Address line 1 - ***Street Address**.
Use this line to include the rest of Business name, if exceeded 40 characters.

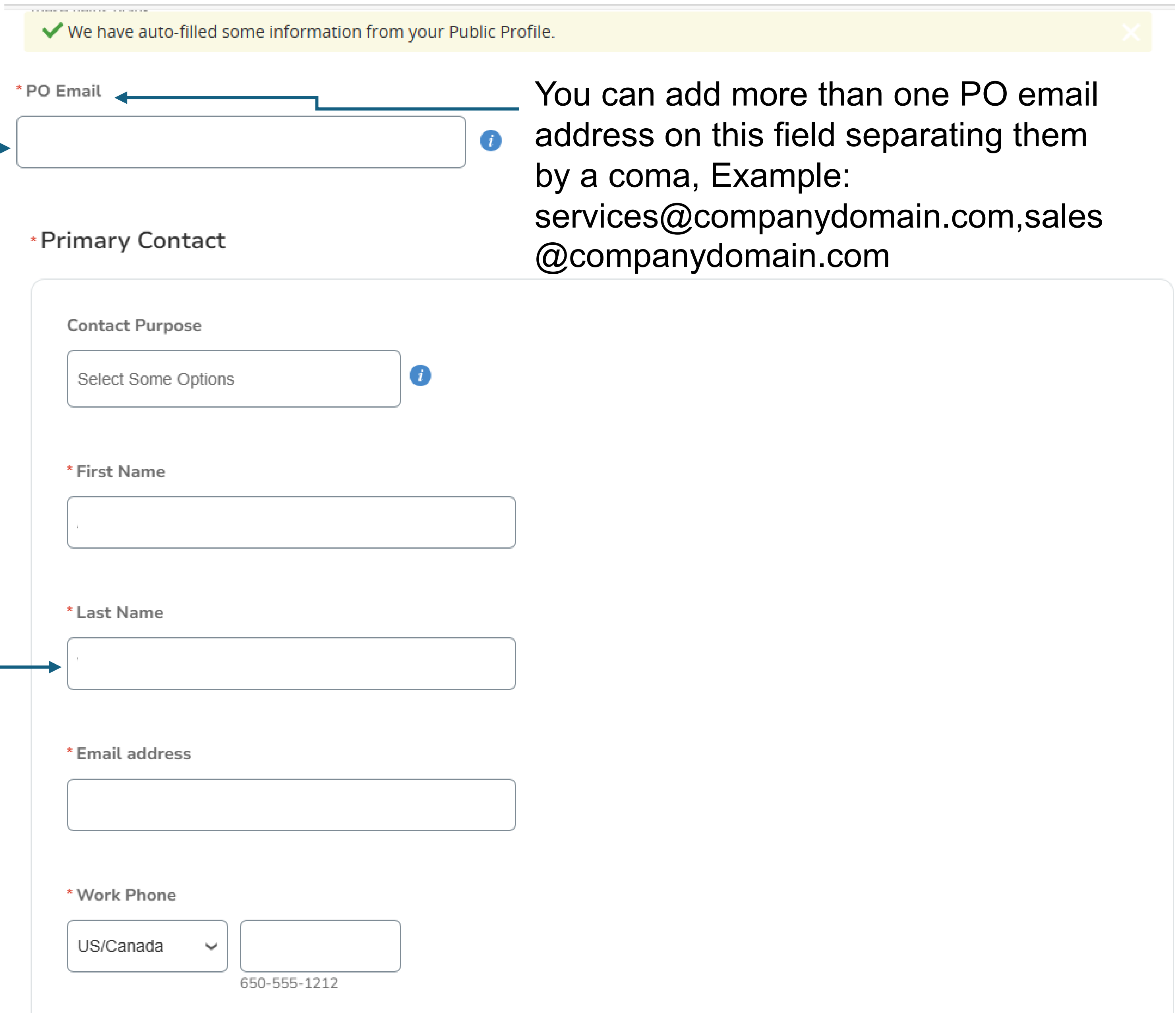


In Section *Primary Contact

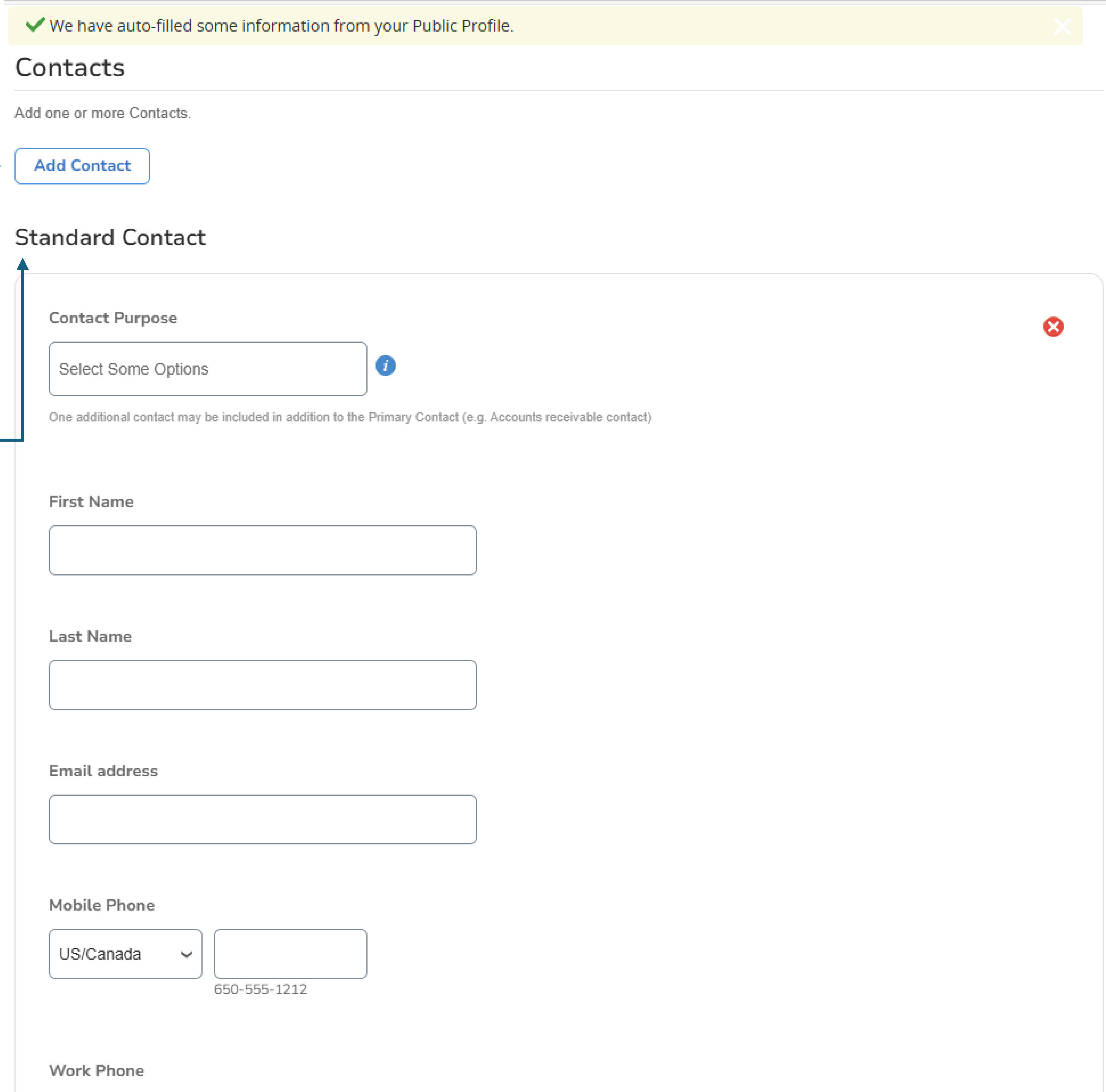
You can add more than one PO email address on this field separating them by a coma, Example: services@companydomain.com,sales@companydomain.com

Note that the email address you type in the ***PO Email** field will receive all the Purchase Orders POs sent through Coupa regardless of the Ledcor division that you provide goods or services.

The ***Email Address** of the Primary Contact can be different than the ***PO Email**.



Click **Add Contact** to add other individuals from your organization that you want Ledcor to reference in the procurement process



Leave the **Standard Contact** section blank if it is identical to the Primary Contact.

Business Operations

Primary Industry

Site preparation

Goods / Services Provided

Site preparation, Land Clearing & Vegetation Removal, De

Regions (US/CAN)

AB: All ✖ BC: All ✖ MB: All ✖
QC: Quebec City Metropolitan Area ✖

Select all applicable regions where your goods/services are provided. If in Canada, please provide the specific region where your goods/services are provided, or "All" for each province/territory if there are no restrictions. If in USA, please select the applicable states.

* Is the company operating full-time as an Indigenous business?

Business Operations.

Select your company **Primary Industry**

Type in detail all the **Goods and Services** you provide.

Regions - Select all regions or areas that your company is able to provide goods/services to.

Indicate if you operate full time as an **Indigenous business.**

The **Modern Slavery Section** reflects Ledcor's Commitment to ethical and responsible sourcing.

Answer this section and provide the additional details required.
If some questions don't apply to your company due to size or industry, answer No and NA (Not Applicable)

Ledcor uses this information in its annual report for the Fighting Against Forced Labour and Child Labour in Supply Chains Act.

Modern Slavery Questionnaire

* Does your organization currently have policies and/or due diligence processes in place related to forced labour and/or child labour?

Select

* Has your organization identified parts of its activities and supply chain that carry a risk of forced labour or child labour being used?

Select

* Does your organization have an action plan if modern slavery practices are suspected or discovered in its HR and Supply Chain?

Select

* Does your organization currently provide training to employees and stakeholder groups on forced labour and/or child labour?

Select

* Does your company have a formal policy(ies) covering human rights and working conditions?

Select

Tax Information - Canadian Company.

Tax Information

* Withholding Tax

Is your company subject to Withholding Tax requirements that may impact payments for goods and services? If your company is based in the USA but provides goods/services to Canada, select Yes.

If your company is subject to withholding Tax requirements, that may impact payments for Goods or Services provided, select **Yes**.

* Tax Region

International

For Canada: Select "International"

Canadian companies must select ***Tax Region** as *International*.

* Canada only: Does your organization have a GST/HST Tax ID?

Select

Answer **Yes** to provide a *GST/HST. Include the full 15 characters (the nine-digit Business Number and the four-character program account identifier)*

Answer **No** to provide a *SIN number*

* Canada only: Is your organization an incorporated or limited company or government/regulatory agency?

Select

Tax Information - Canadian Company.

* Canada only: Is your organization an incorporated or limited company or government/regulatory agency?

No

* Is your organization providing Services?

Yes

* T4A

☐

Check off this box if you selected Yes to the above. (Your organization is NOT an incorporated or limited company, or government/regulatory agency AND is providing services)

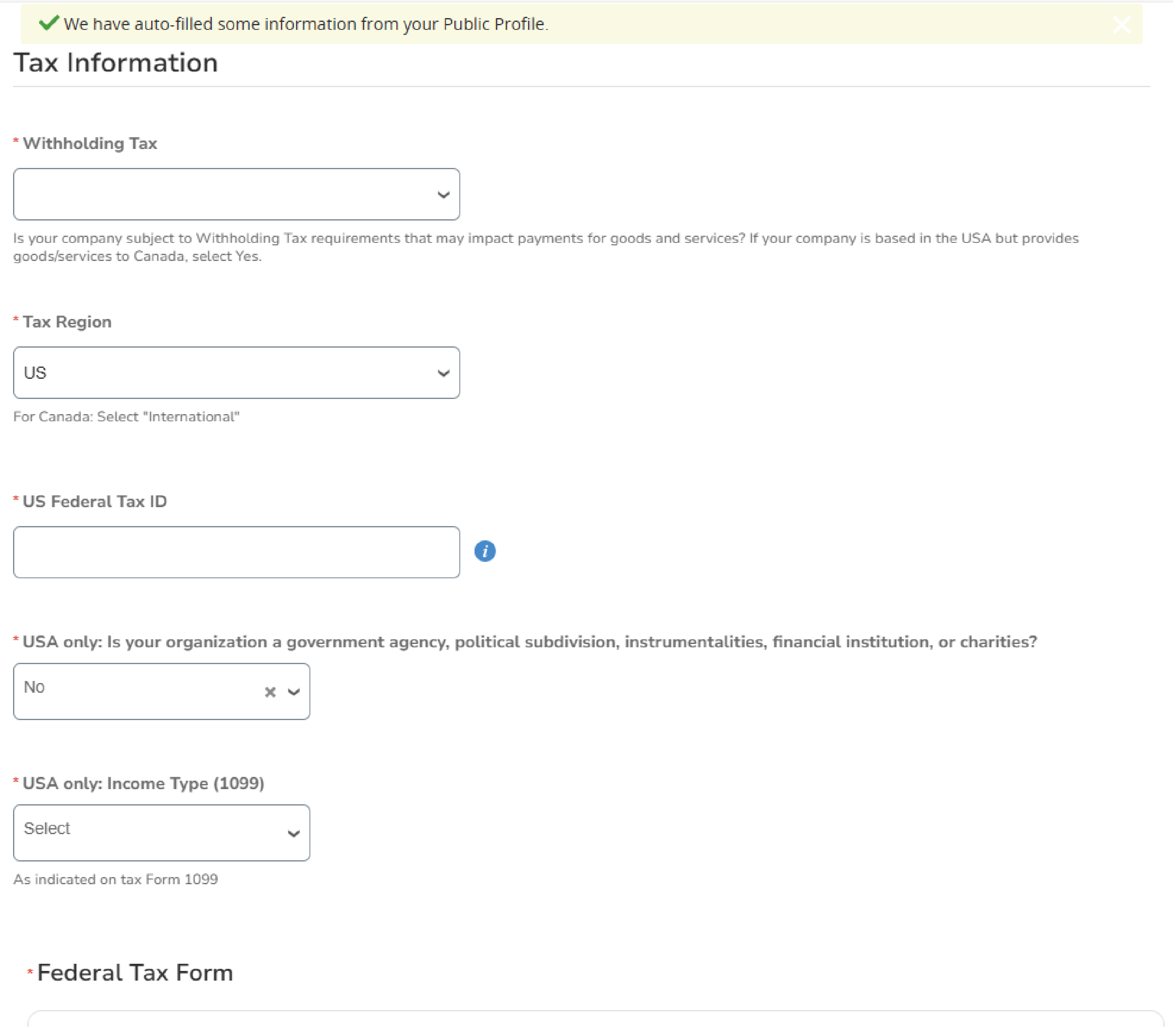
If your organization is **incorporated,** select **Yes** and continue to Payment and Banking Information section.

If your organization is **not incorporated**, and provide services to Ledcor, mark the box T4A. Ledcor will send you a T4A at the end of the fiscal year.

Tax Information - USA Company.

If your company is subject to withholding Tax requirements, that may impact payments for Goods or Services provided, select **Yes**.

Fill out all the mandatory fields (*)


We have auto-filled some information from your Public Profile.

Tax Information

* Withholding Tax

Is your company subject to Withholding Tax requirements that may impact payments for goods and services? If your company is based in the USA but provides goods/services to Canada, select Yes.

* Tax Region

US

For Canada: Select "International"

* US Federal Tax ID

* USA only: Is your organization a government agency, political subdivision, instrumentalities, financial institution, or charities?

No

* USA only: Income Type (1099)

Select

As indicated on tax Form 1099

* Federal Tax Form

Tax Information - USA Company.

You may be prompted to upload the necessary tax supporting documents on the ***Attachments** section.

Click on **File** to include your attachments.

We have auto-filled some information from your Public Profile.

*Federal Tax Form

* Type

* Attachments

Add File

Please attach the completed W8 or W9 form

* W9 Federal Tax Classification

Select

Select the federal tax classification as identified in your submitted W-9 form
*EIN: Employer Identification Number

W9 Entity / Individual Name

Provide the name of entity/individual *if it is different* from the business name / disregarded entity name provided on the W-9 form

We have auto-filled some information from your Public Profile.

Payment & Banking Information

Ensure the information provided in this section is accurate and up-to-date to streamline payments to your organization.

Currency

CAD

* Payment Terms

Select

Ledcor policy is Net 30 days. If another payment term is required, please indicate in the comment section.

Payment Terms (internal use only)

None

Ledcor policy is Net 30 days. Other Payment Terms will be reviewed.

* Payment Type

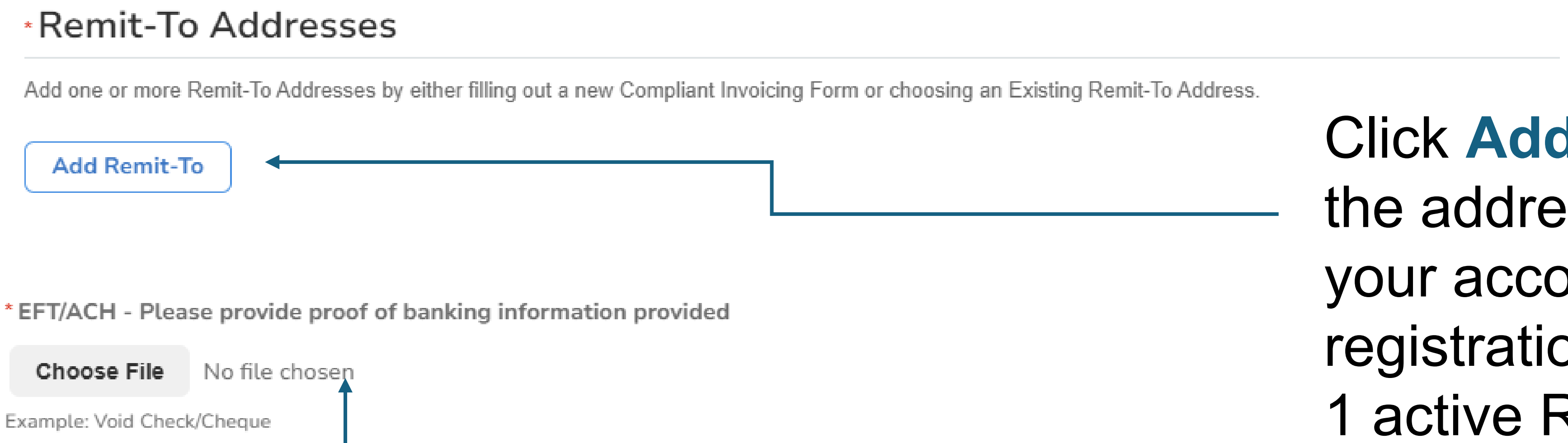
EFT / ACH

Currency - Select the currency matching your bank account.

***Payment Terms** – The Ledcor team will review the form and approve the right payment terms.

***Payment Type** - We recommend EFT/ACH to streamline invoice payments.

Even if you select to be paid by EFT/ACH, you need to Click *Add Remit-To*, to provide your bank details for bank transfers. You must enable a Multi-Factor Authenticator (MFA) for security before adding your bank details. Save the changes on the questionnaire before enabling the MFA.

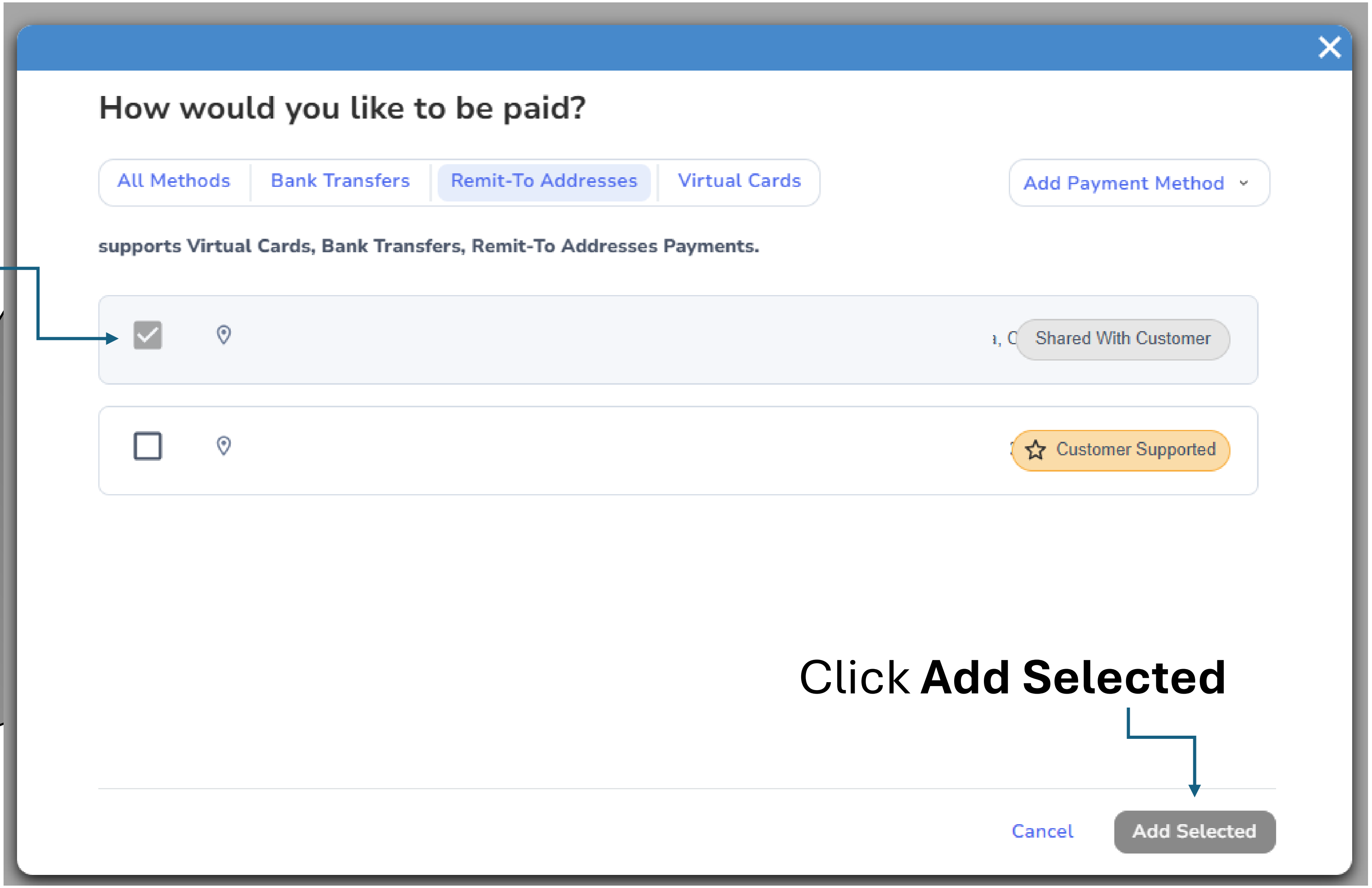


Click **Add Remit-To**, to display the addresses you have on your account from the previous registration process. Keep only 1 active Remit To address in Coupa.

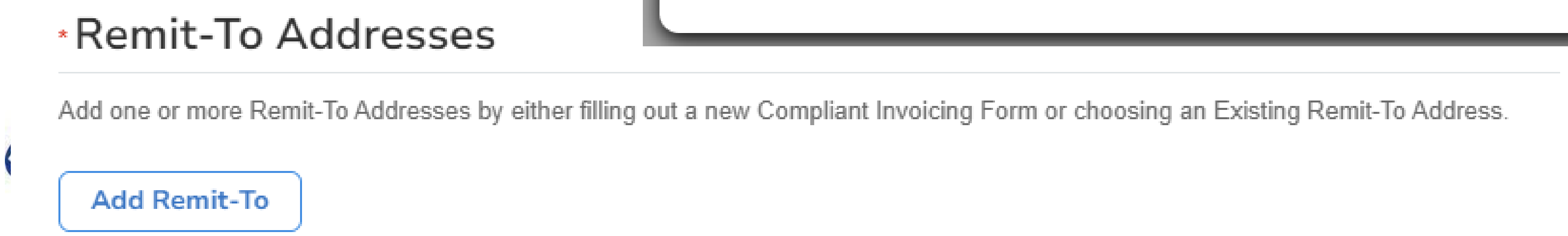
You are required to upload a Void Check, Bank letter, or official document that verifies the payment details.
Click **Choose File**.

The next window will open:

Select the preferred payment method saved on your account checking the box.

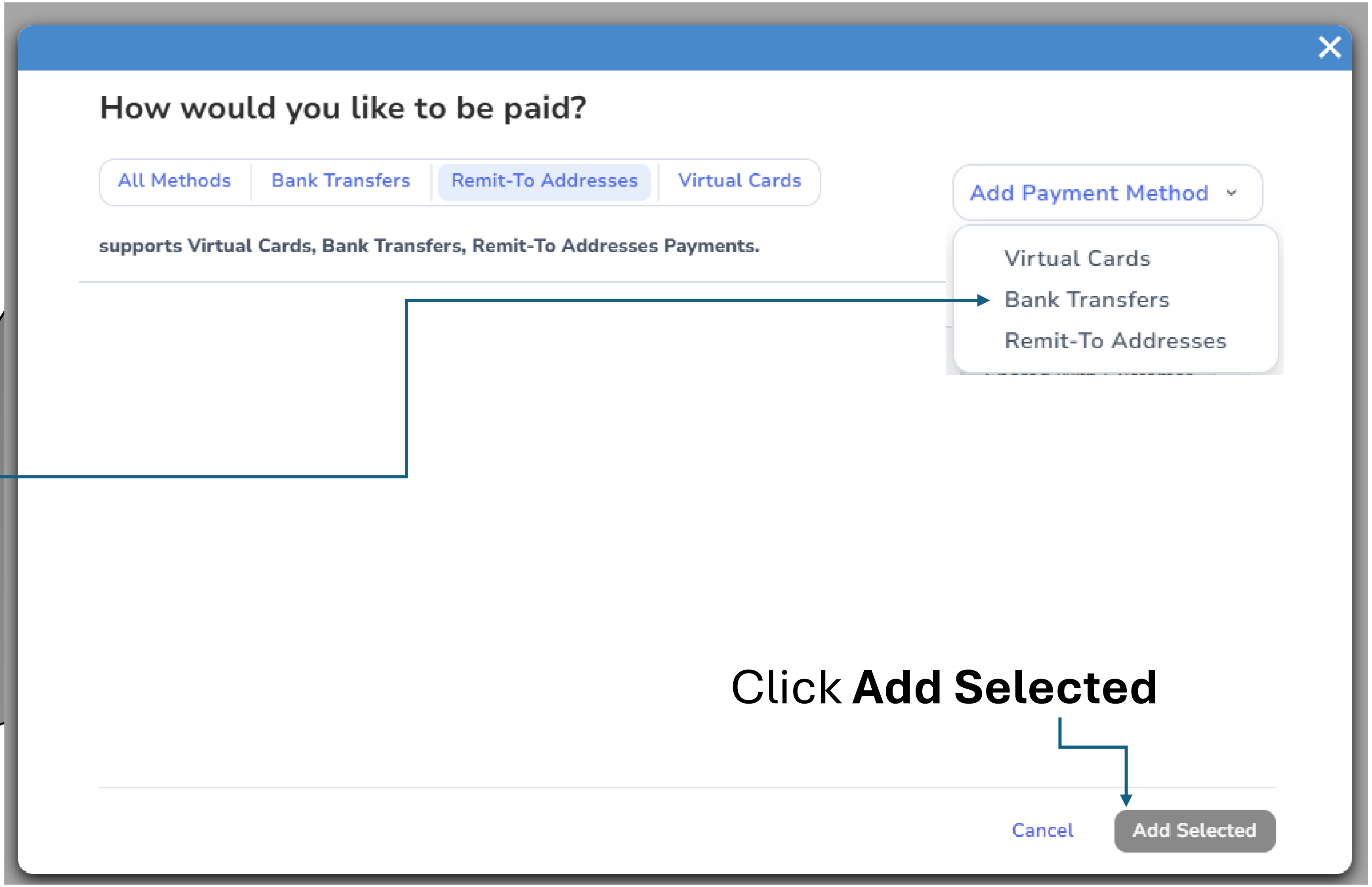


Click **Add Selected**



If the window is empty:

Click on *Add Payment Method*: Click *Bank Transfers,* to be paid on EFT/ACH.



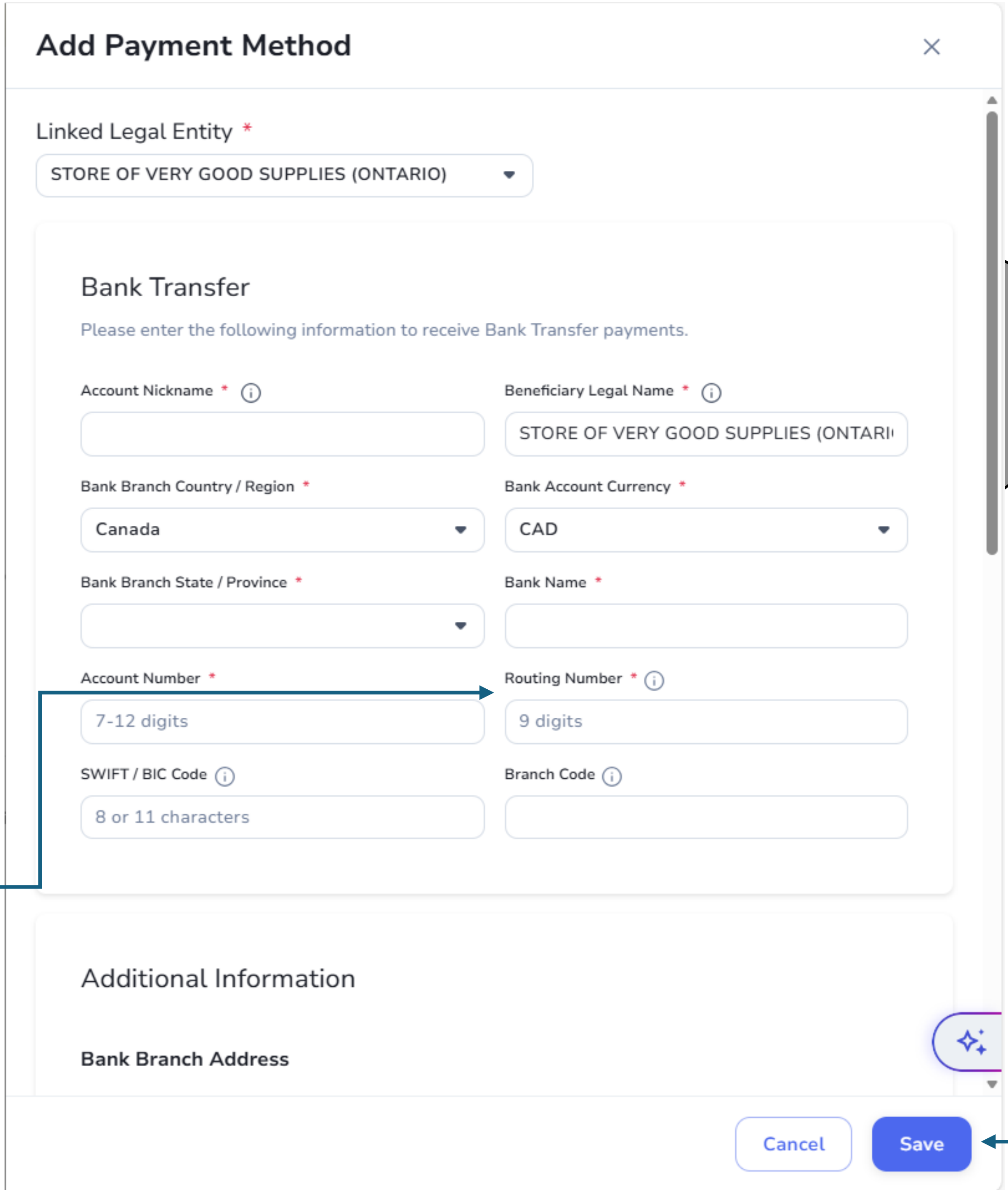
Click **Add Selected**

* Remit-To Addresses

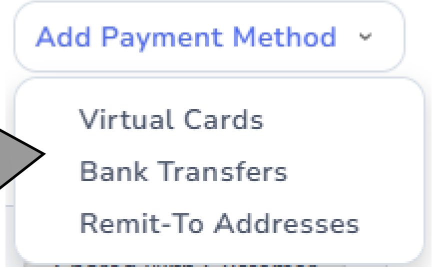
Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

The next window will open:



Your 9-digit **Routing Number** must be a 0, then 3-digit institution number, then 5-digit branch number

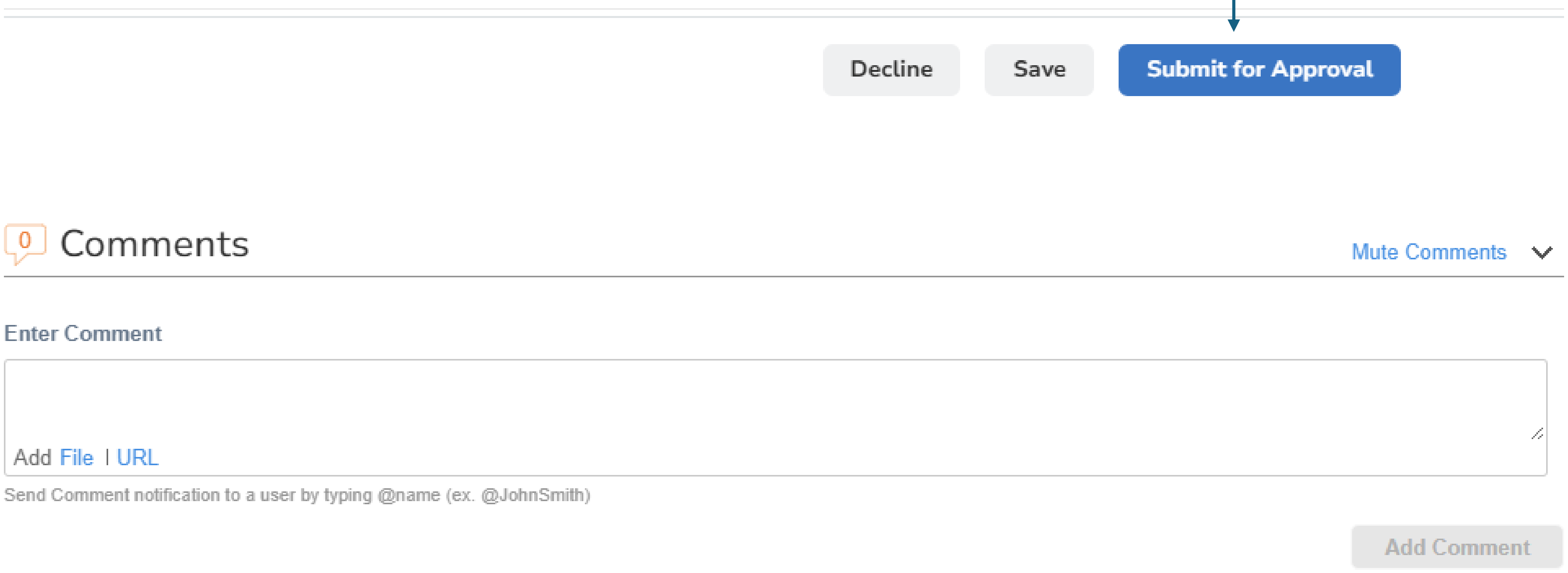


Click on *Add Payment Method*: Click *Bank Transfers*, to be paid on EFT/ACH.

Click *Save*

Fill out additional comments or include files on the **Comments** section at the end of the form.

Once you completed all the sections, Click **Submit for Approval**.



coupa supplier portal

ANA | NOTIFICATIONS 0 | HELP

Invoices | Orders | **Business Profile** | Payments | Service Sheets | Items | ASN | Sourcing | Forecasts | Setup | More...

Business Profile | Profile Submissions | Legal Entities | Payment Methods | Information Requests | Performance Evaluation | Subscriptions

ledcor-test

Select Customer: ledcor-test

Your information has been submitted

View All Responses

Form 1B - Supplier Questionnaire

Updated 0818 - This form is completed by a first-time supplier to provide all the necessary information for Ledcor to onboard the supplier to Coupa and process invoices.

Pending Approval

Supplier Information

Ledcor Supplier - 1

Ledcor team will review the form and approve it prior to start transacting.
Your application will remain in **Pending Approval** status until is **Approved**.

Thank you for completing the Supplier Questionnaire!

If you need any additional support, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

Supplier Enablement Support

coupa supplier portal

Coupa Supplier Portal (CSP)

Security and Multi-Factor Authentication

1. Security

Securing your transactions is Coupa's top priority. The continuous improvements to the CSP help keep your accounts and data safe. Adding MFA to your account increases its security.
MFA is mandatory with sensitive payment accounts to increase the security of your payment settings in Coupa.

Note: Two-factor authentication (2FA) is mandatory for CSP payment accounts. It is not required for other CSP features.

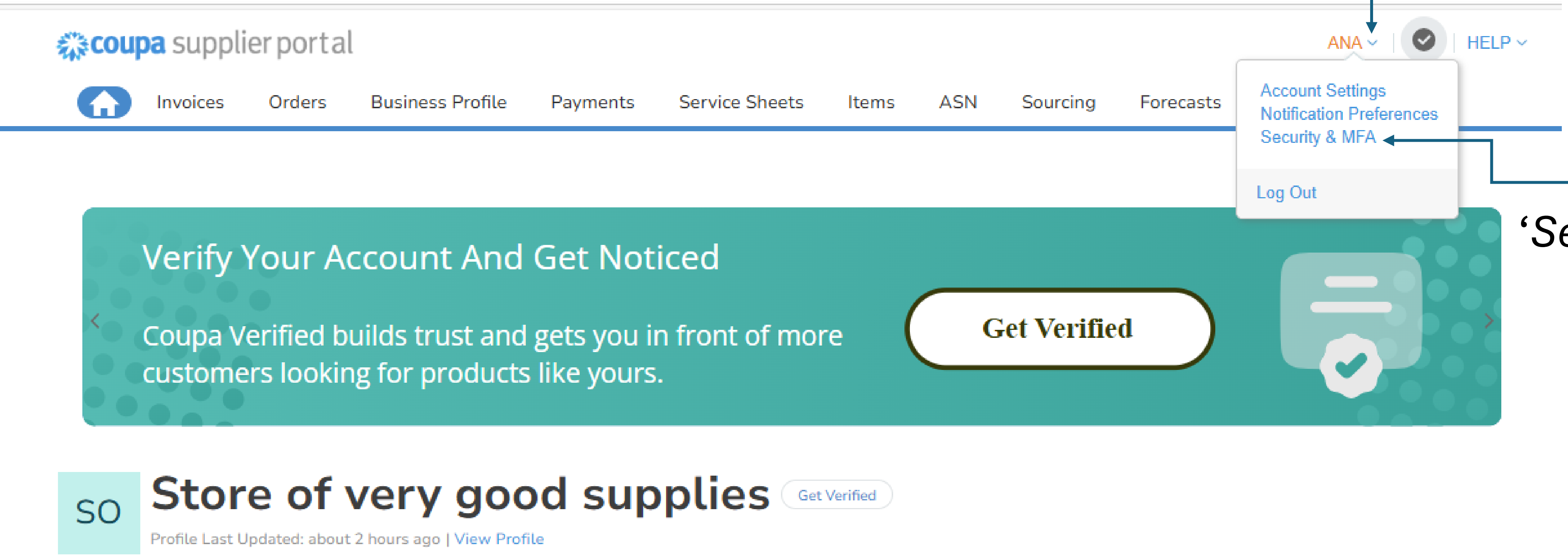
Note: Two-factor authentication (2FA) helps prevent unauthorized access to your CSP account, even if someone knows your password.

Note: The preferred 2FA method is an authenticator app, such as Google Authenticator, Twilio Authy, or Microsoft Authenticator. These apps are free to download from the Apple App Store or Google Play. SMS text messages are a secondary method also supported by Coupa.

2. Multi-Factor Authenticator

Multi-factor authentication (MFA) is required for Sensitive account updates, namely changes to your legal entity, remit-to, and bank account information require MFA. Enabling MFA is quick and easy, MFA guide: [Manage Multi-Factor Authentication]

From CSP home page, dropdown next to your name the account setting options:

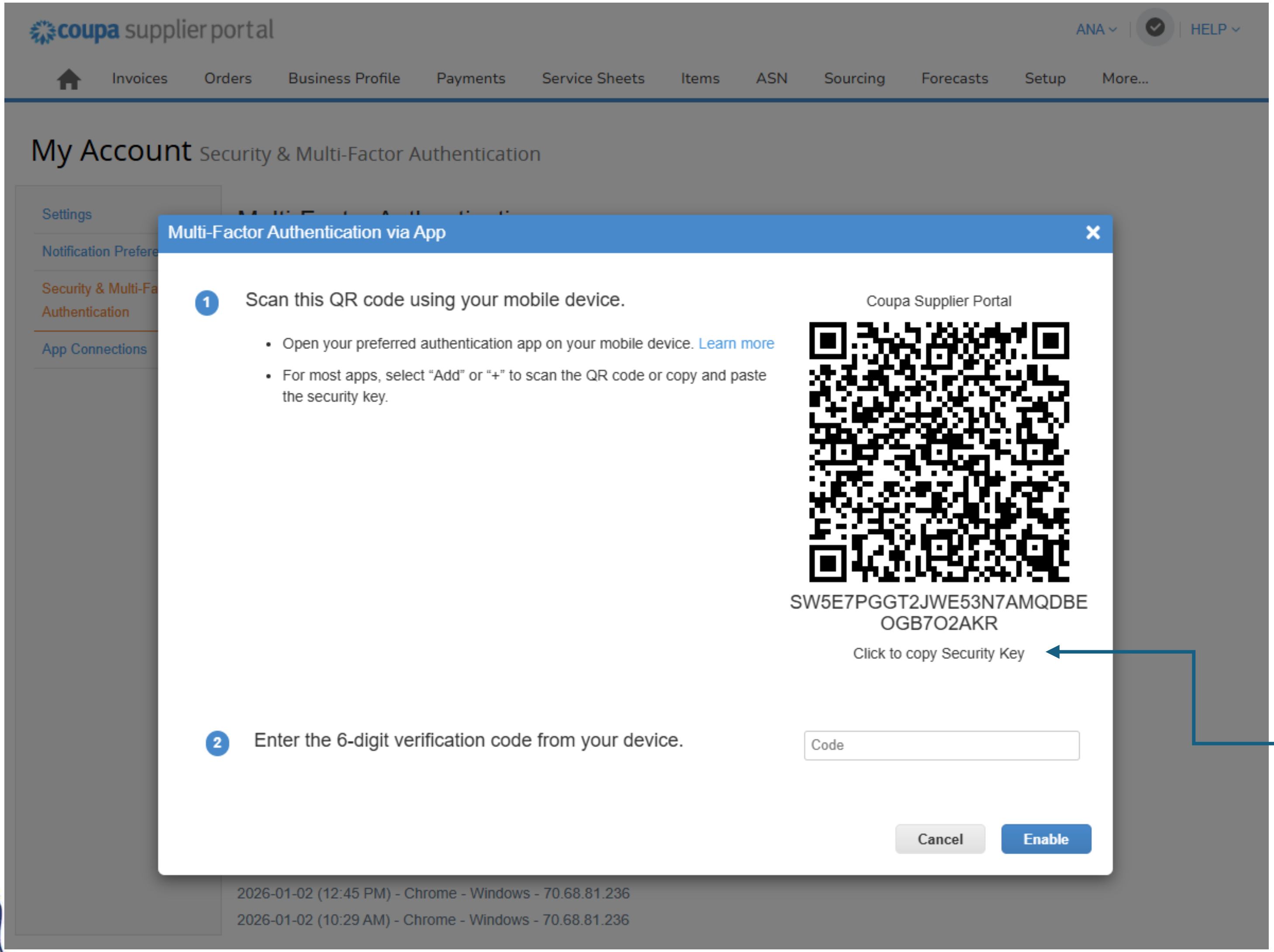


Click *'Security & MFA'*

Multi-Factor Authenticator:
Option 1. Enable by using an Authenticator App.

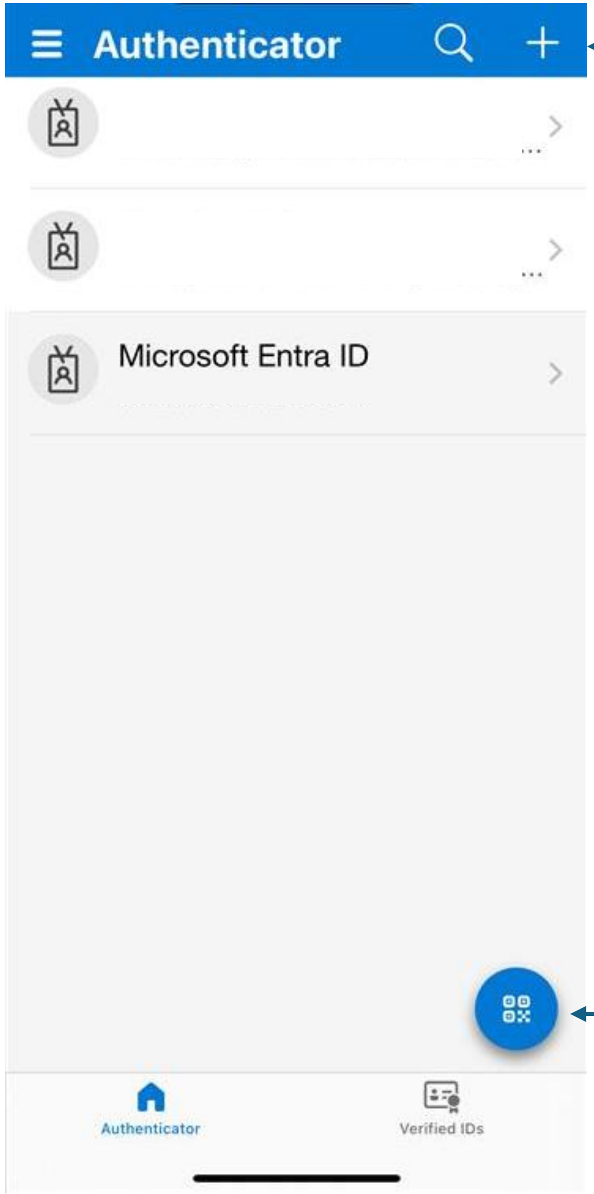
(This is the recommended option)

The next screen & modal will open to facilitate enablement by your preferred authentication app:



1. Visit the the Google Play store or the Apple app store.
2. Search for an authenticator app.
The recommended option is to use Google Authenticator, which is available for iOS and Android devices.
3. Download and install your preferred authenticator app.
4. Open the app on your mobile device to scan the QR code shown in the modal with the authenticator app or copy the security key to use it as the CSP authentication code.

Microsoft Authenticator App, mobile screen example:



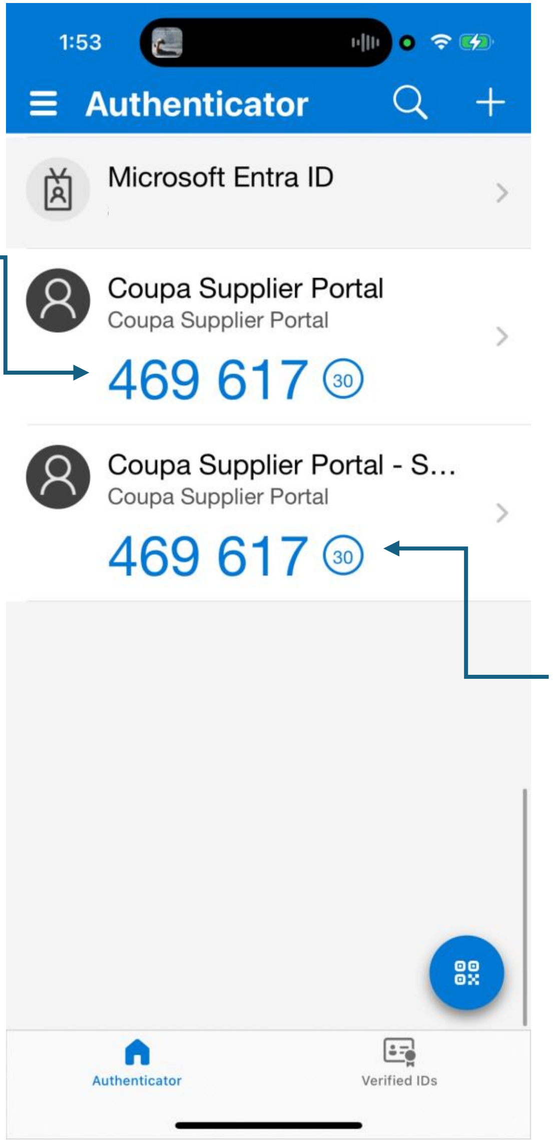
5. For most apps, select "Add" or "+" to scan the QR code.

Microsoft Authenticator App has this QR button to scan the QR Code from the CSP.

Microsoft Authenticator App, mobile screen example:

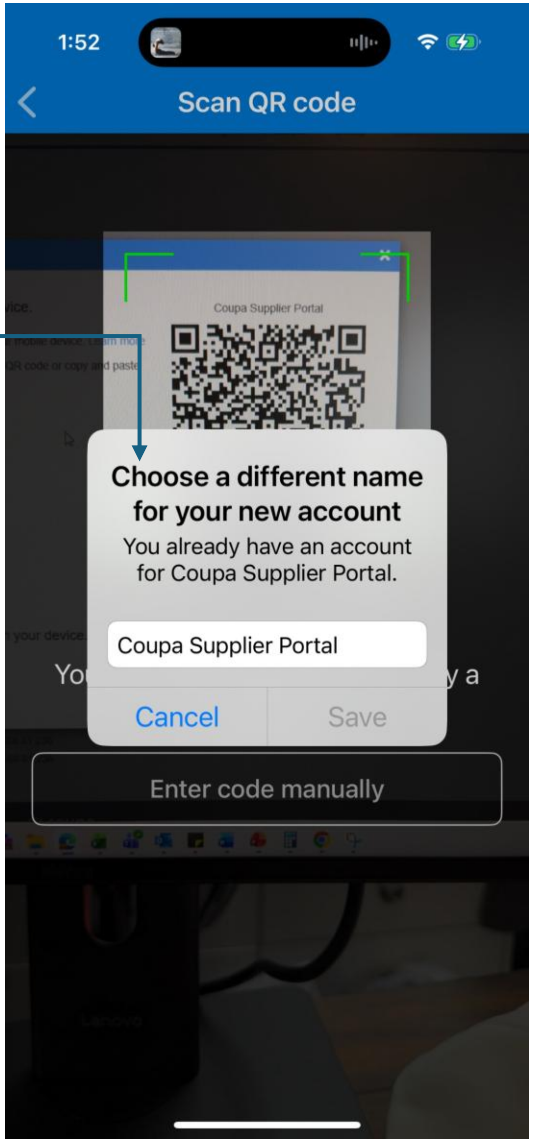
6. Enter the 6-digit verification code from your device in the input field on the modal.

The code that Google & Microsoft Authenticators provide are good only for 30 seconds.

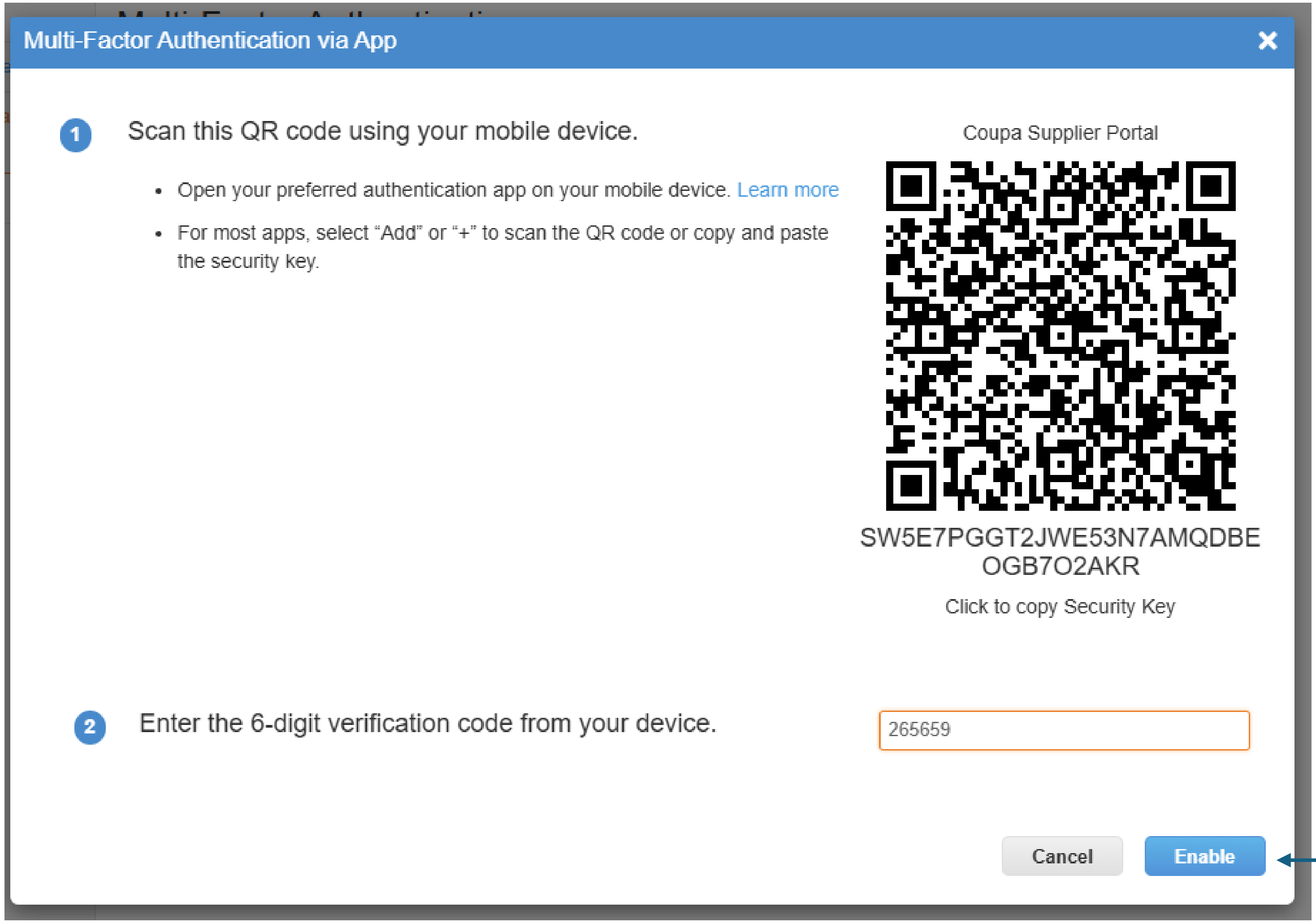


After you scan the QR code from CSP, the app will require you to add a name to save

If you don't type that code on the CSP sign-in page and click **Log In** within 30 seconds, you have to get a new code and try again.

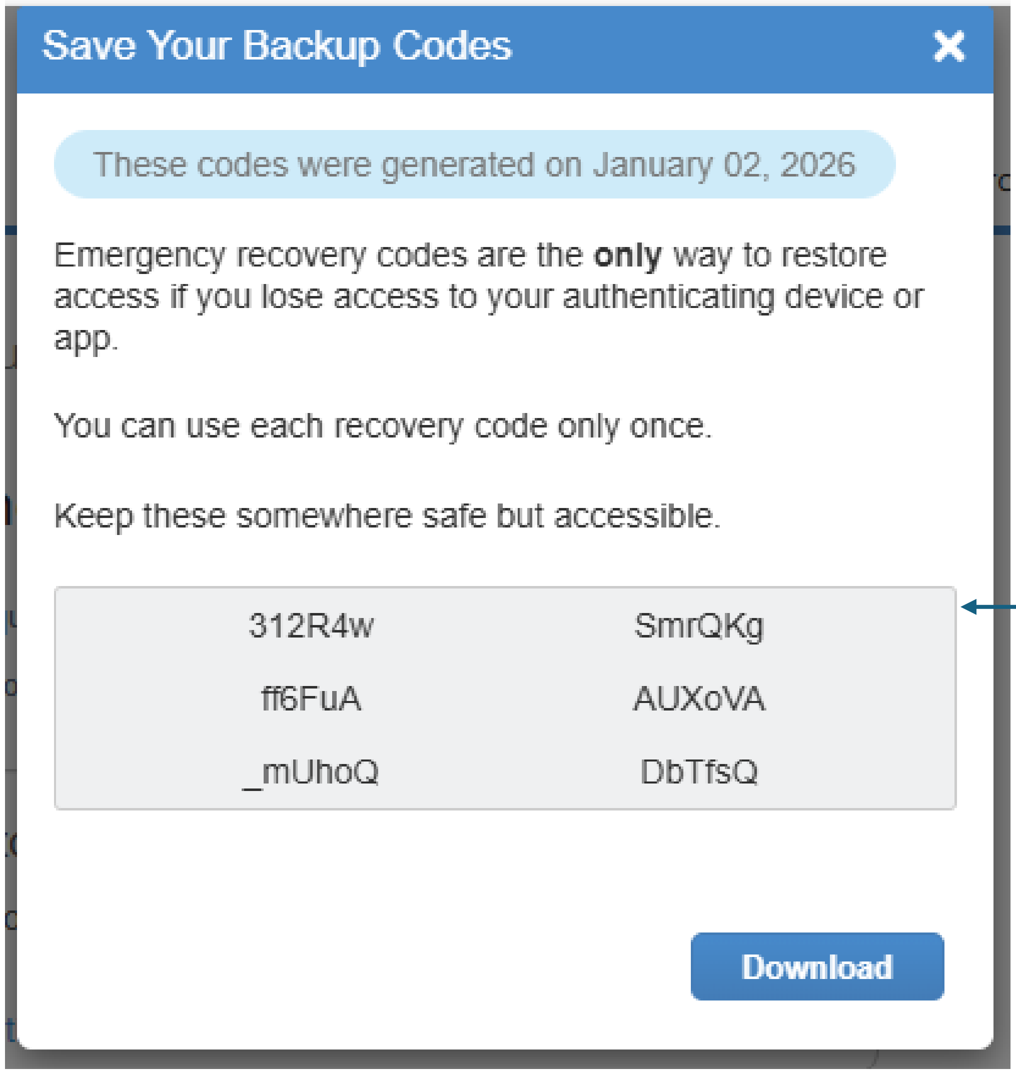


CSP *'Security & MFA'* section:



7. Select the **Enable** button at the bottom right of the modal.

CSP ‘*Security & MFA*’ section:

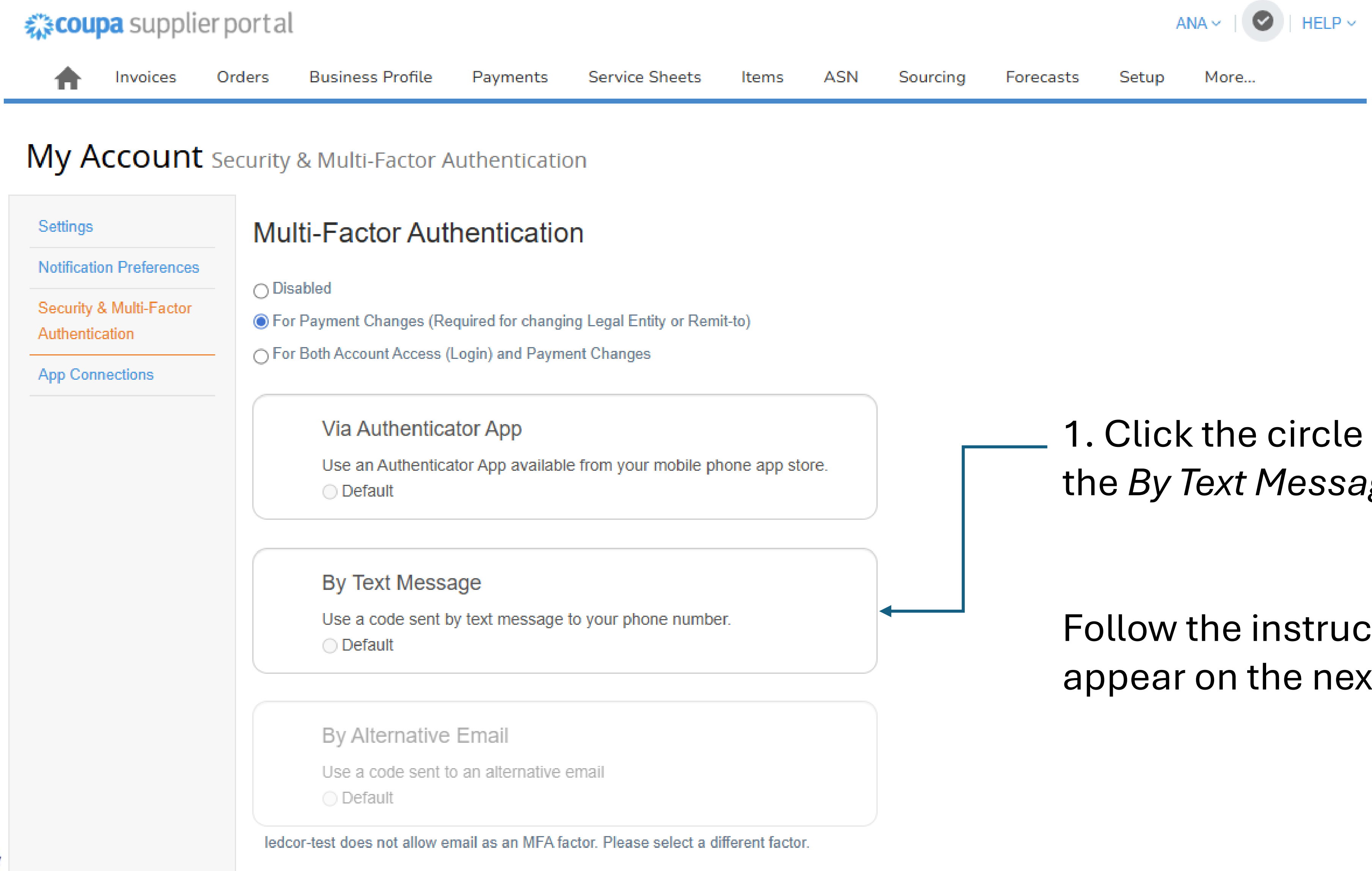


8. Print your backup codes or email them to yourself before you click **x** on the top right corner. If you ever lose your device, you need these to regain access to your CSP account.

9. You will receive an email with the confirmation that your MFA has been enabled.

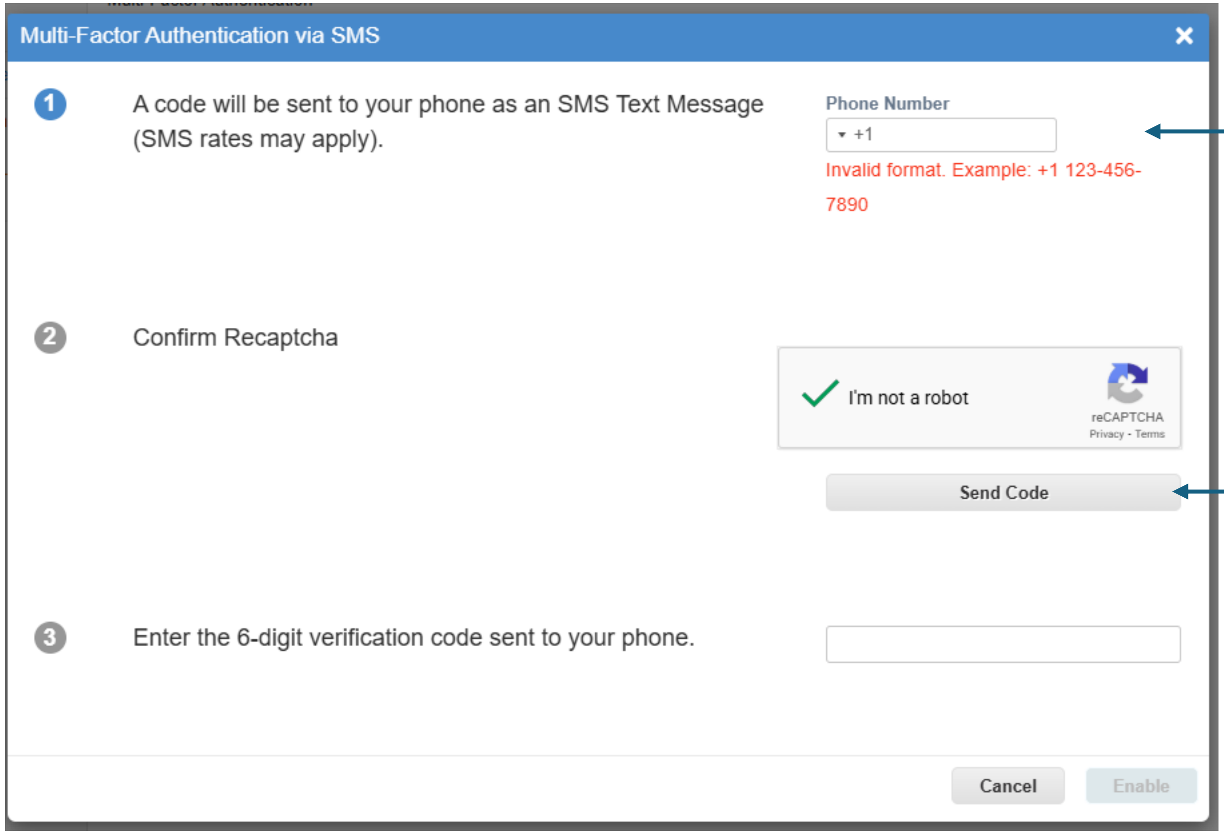
Multi-Factor Authenticator:
Option 2. Enable by using SMS text message.

CSP ‘*Security & MFA*’ section:



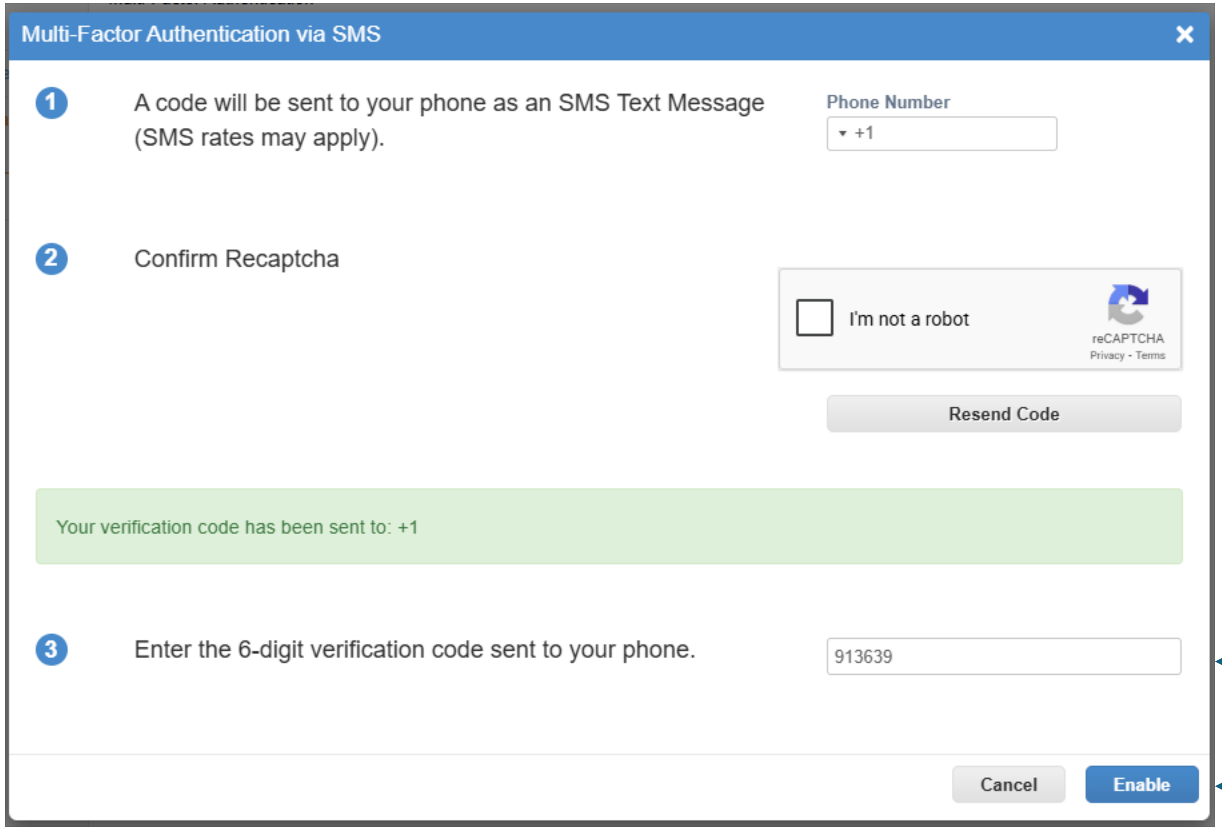
1. Click the circle next to the *By Text Message* option.

Follow the instructions that appear on the next screen.



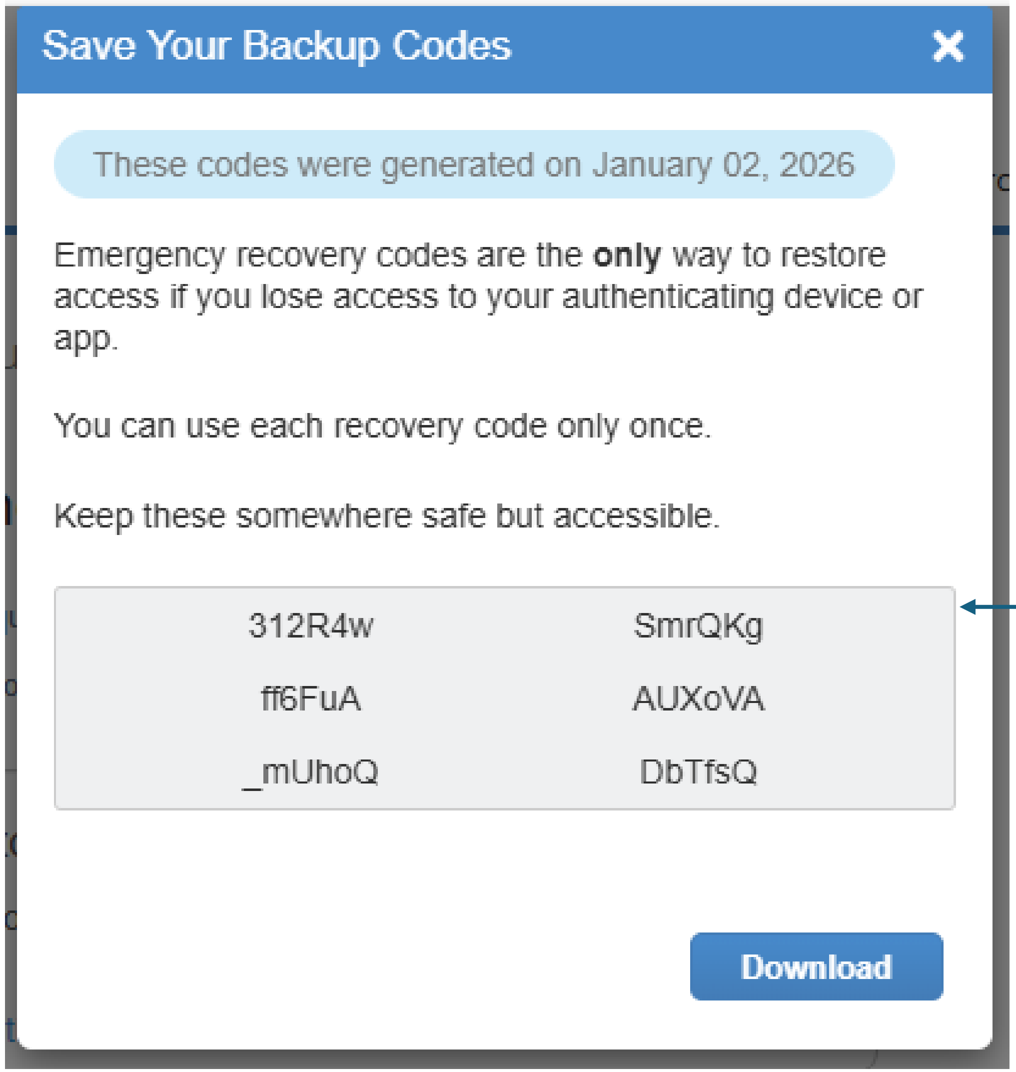
2. Input the phone number where you want to receive the SMS text and confirm Recaptcha.

3. A code is sent to your phone as an SMS text message (SMS rates may apply).
Confirm the Recaptcha shown in the modal and select the **Send Code** button.



4. Enter the 6-digit verification code sent to your phone in the field next to the third steps shown on screen.

5. Select the **Enable** button at the bottom right of the modal



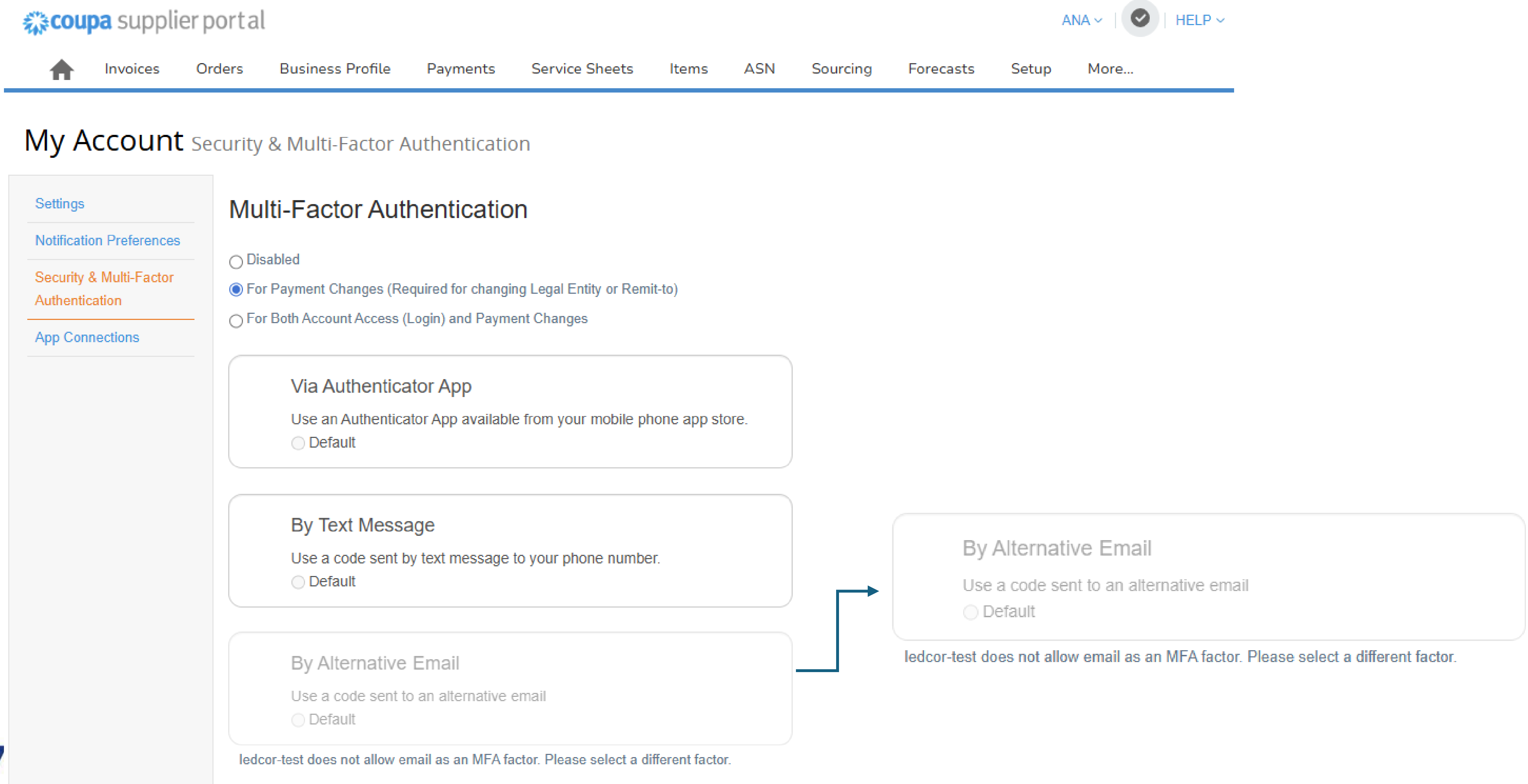
6. Print your backup codes or email them to yourself before you click **x** on the top right corner. If you ever lose your device, you need these to regain access to your CSP account.

You will receive an email with the confirmation that your MFA has been enabled.

Multi-Factor Authenticator:

Option 3. Enable by using email to receive a code.

You will see this option grayed out if you have more than 1 customer in Coupa. In that case, please enable the MFA via the App, Text message, or Passkey.



Your information in the Coupa Supplier Portal (CSP) is protected using industry-standard security measures. All data transmitted to and from the Coupa network is encrypted with 256-bit encryption.

Coupa applications are hosted on Amazon Web Services — the same infrastructure used by Amazon.com — ensuring secure handling of your data and payment information. Passwords and other sensitive data are encrypted during transmission, and you can enable Multi-Factor Authentication (MFA) to further secure your account.

For added protection, Coupa strongly recommends enabling MFA on your CSP account. For more details on securing your account, visit Coupa's Security Best Practices page.

Thank you for enabling MFA!

If you need any additional assistance, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

[Supplier Enablement Support]

coupa supplier portal

Coupa Supplier Portal (CSP)

Contact Coupa Support

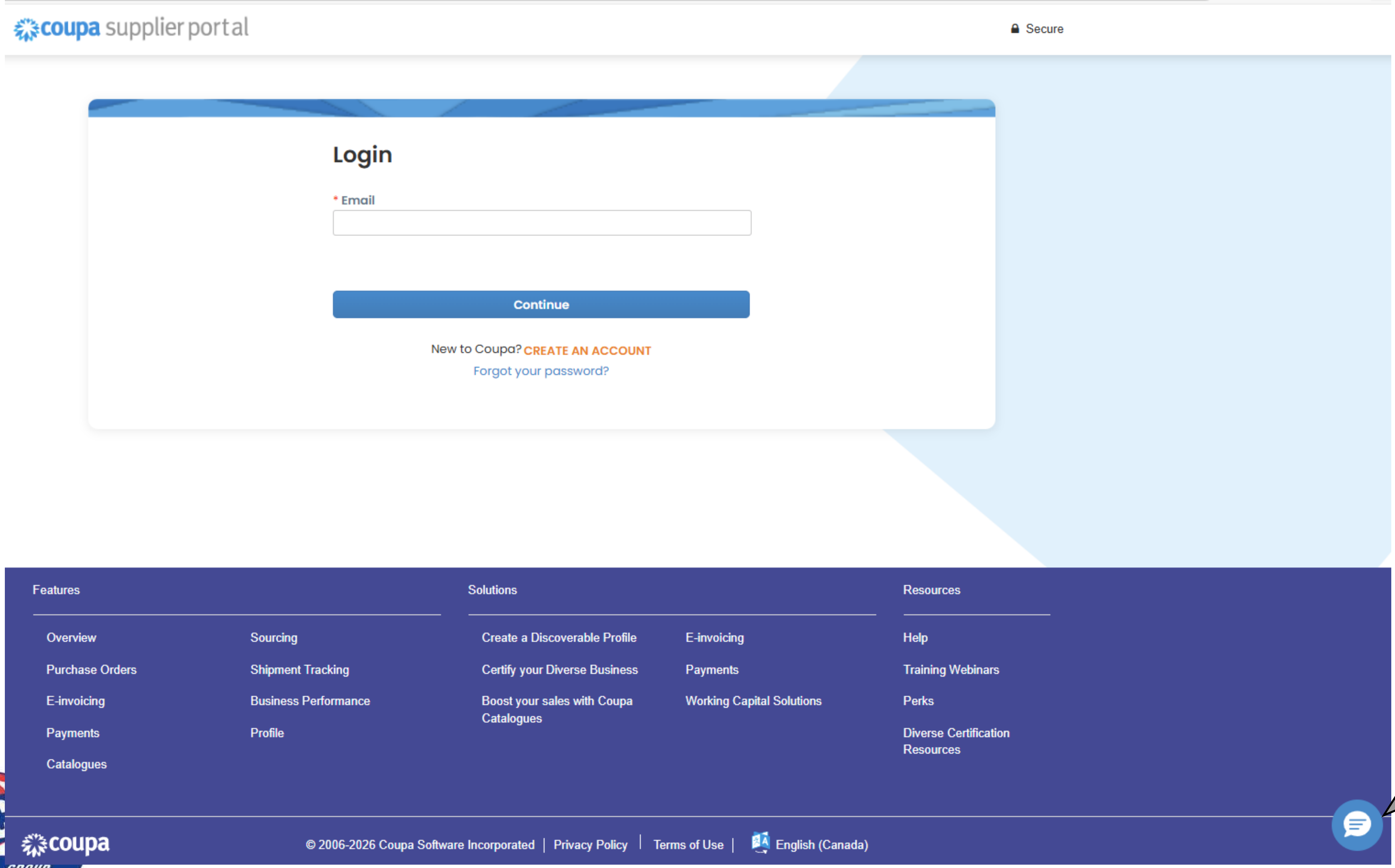
Ongoing support will be provided by the Supplier Enablement team through webinars and one-on-one support. Suppliers can reach out directly to **supplier.enablement@ledcor.com**.

For complex or technical issues, suppliers will be directed to the Coupa Supplier Support team.

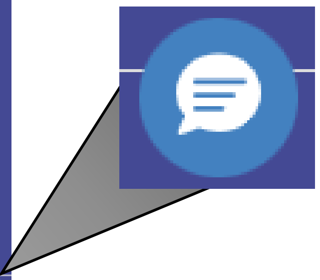
Note that invoice or payment inquiries should be directed to **vendor.inquiries@ledcor.com**.

1. Chat with Coupa Support

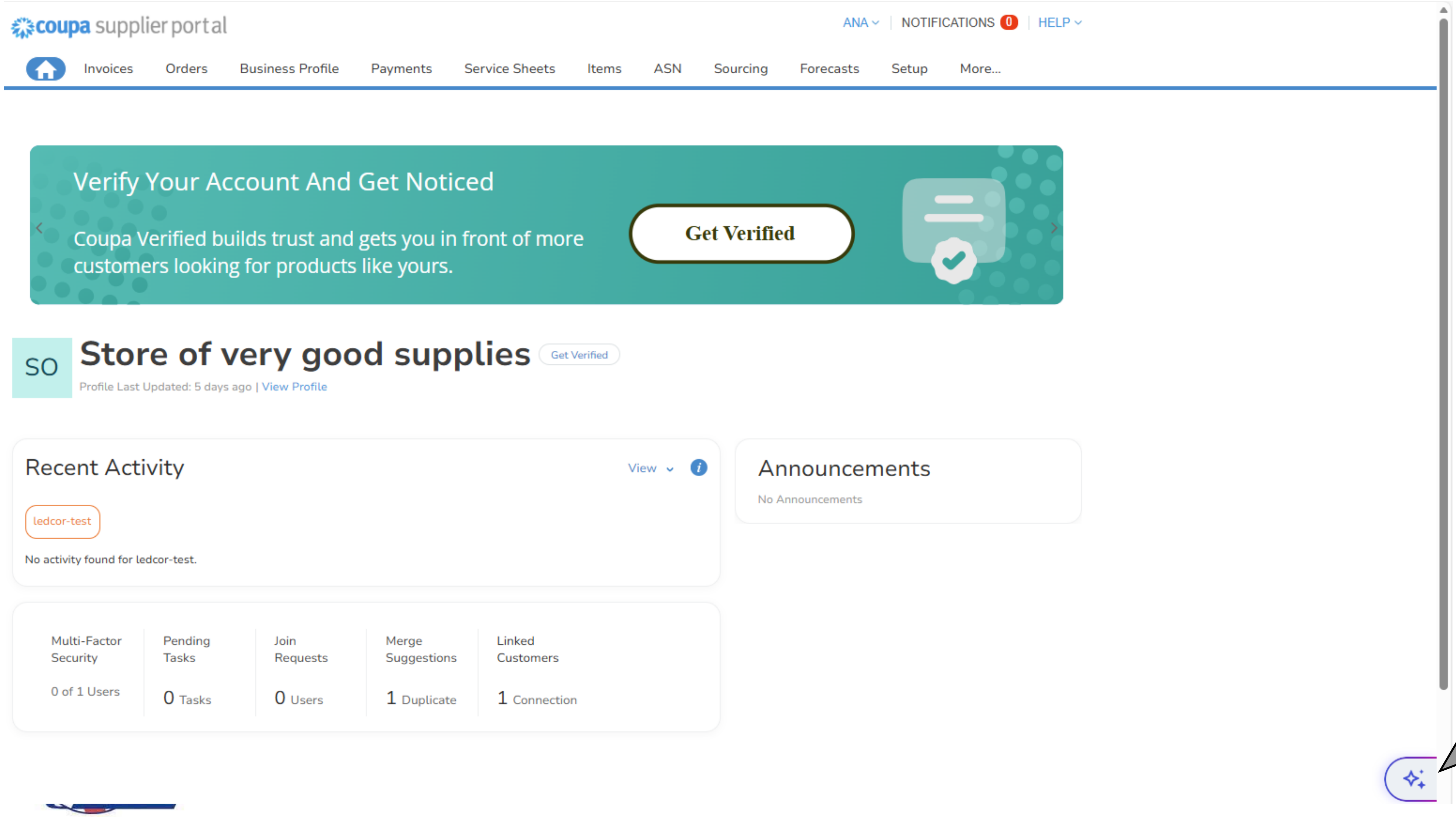
From your CSP login page locate ‘Chat with Coupa Support’ :



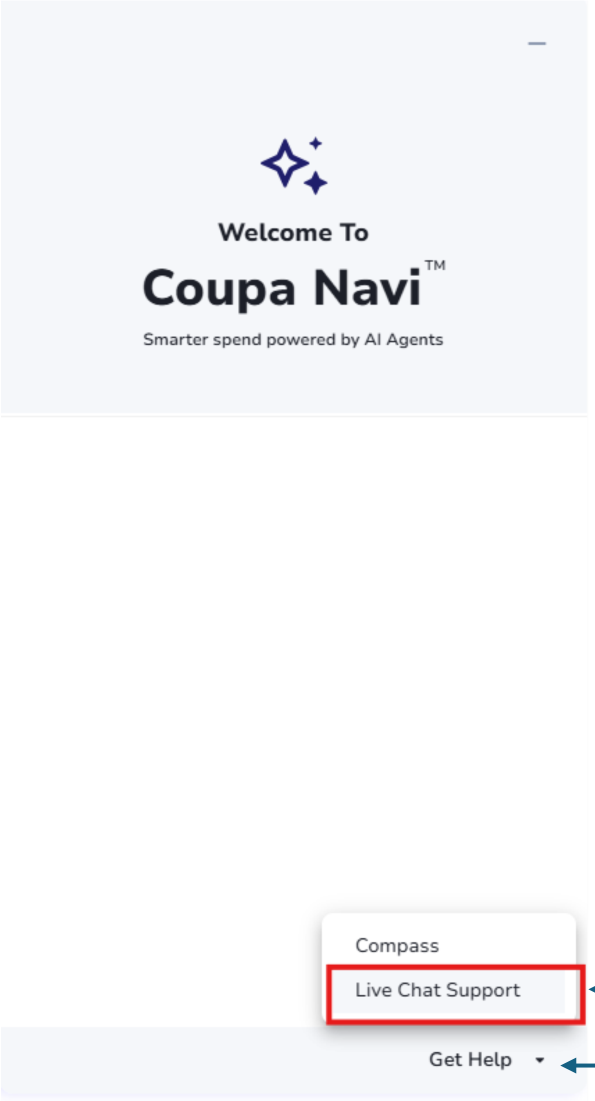
Click to display their contact form.



Or Log into CSP and from the home page locate 'Chat with Coupa Support' :



Click to display their contact form.

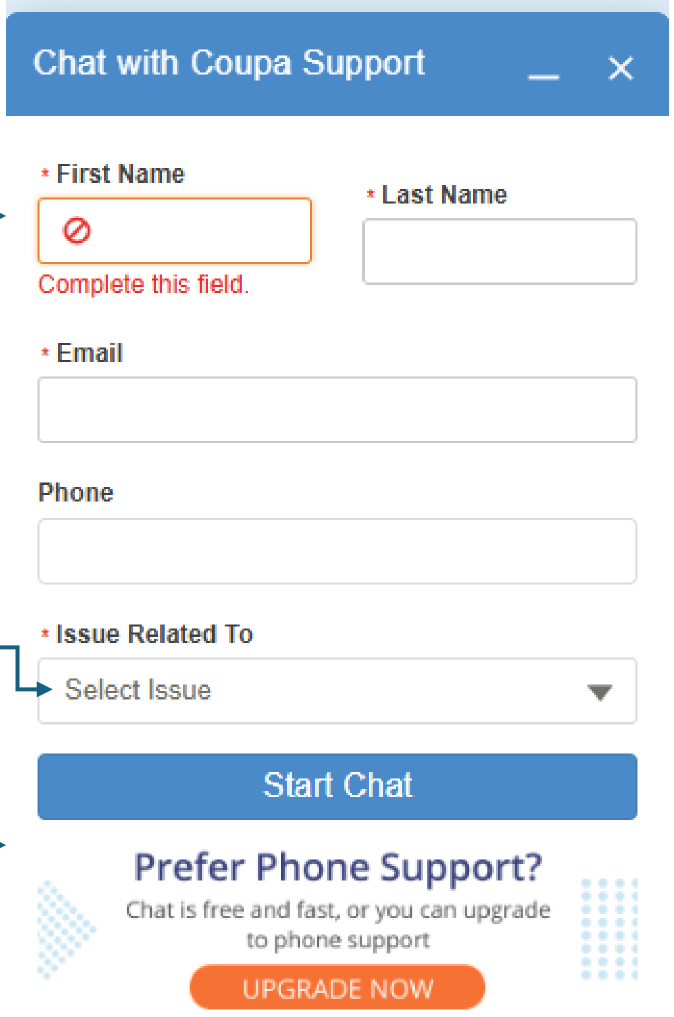


Fill out the required information (*)

In this section, some of the issue categories display also an email to contact for support.

Select the best category for the issue you are trying to resolve.

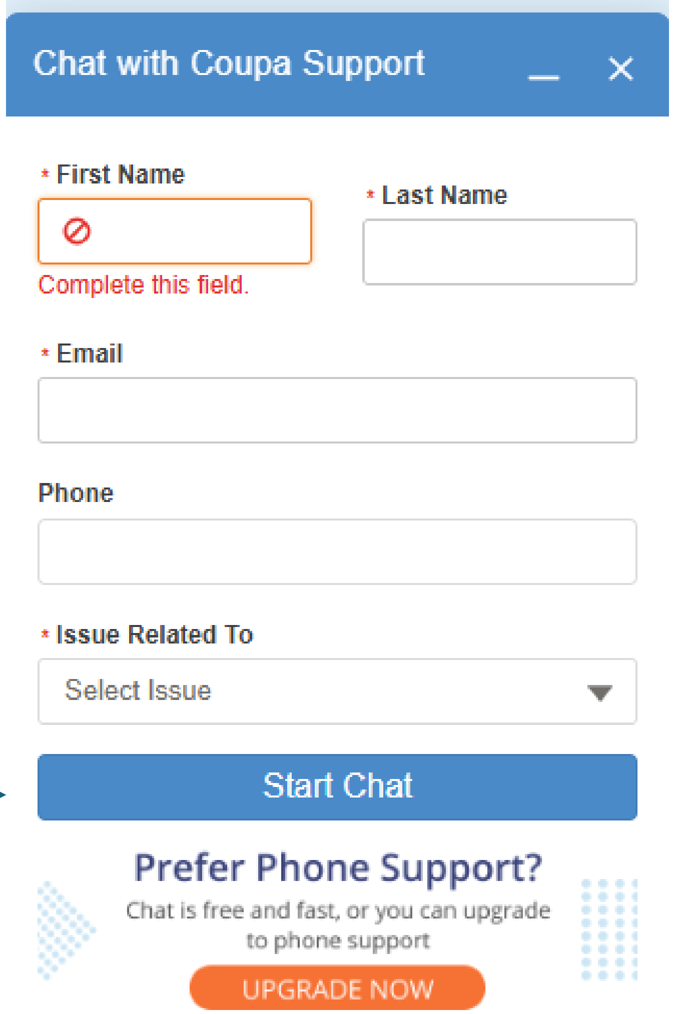
Click Get Help and Live Chat Support, The contact form will open.



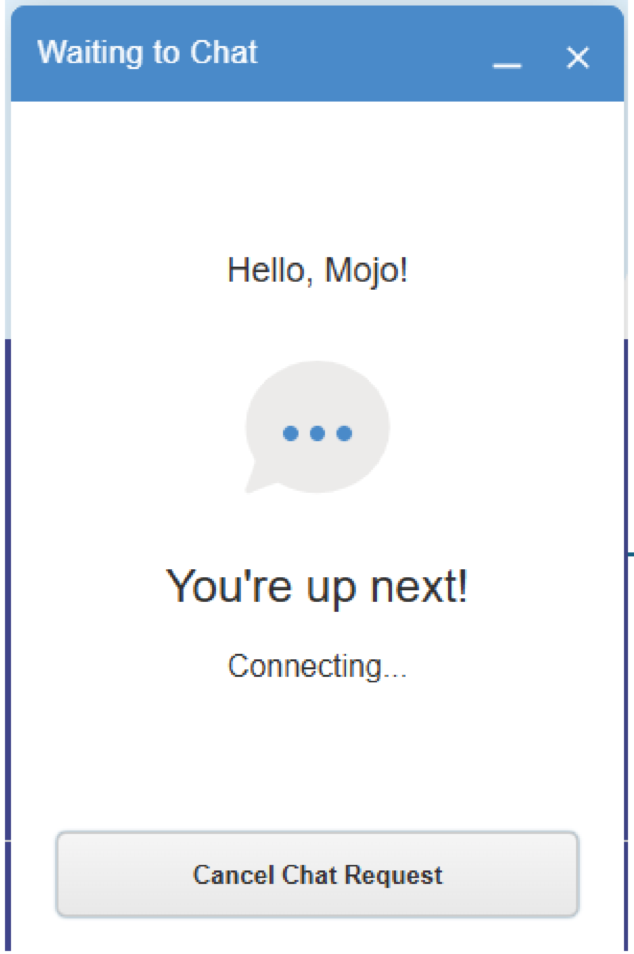
Coupa recommendations to some issue categories:

Payment - Please contact your customer directly.
Password Reset - You can send an email to supplier@coupa.com with the query from your registered email address.
Two Factor Authentication - You can send an email to supplier@coupa.com with the query from your registered email address
Payment Preferences (Static Discounting): You can send an email to accelerate@coupa.com for further assistance.
Sourcing - Please contact your customer or send an email to sourcing.support@coupa.com for further assistance.

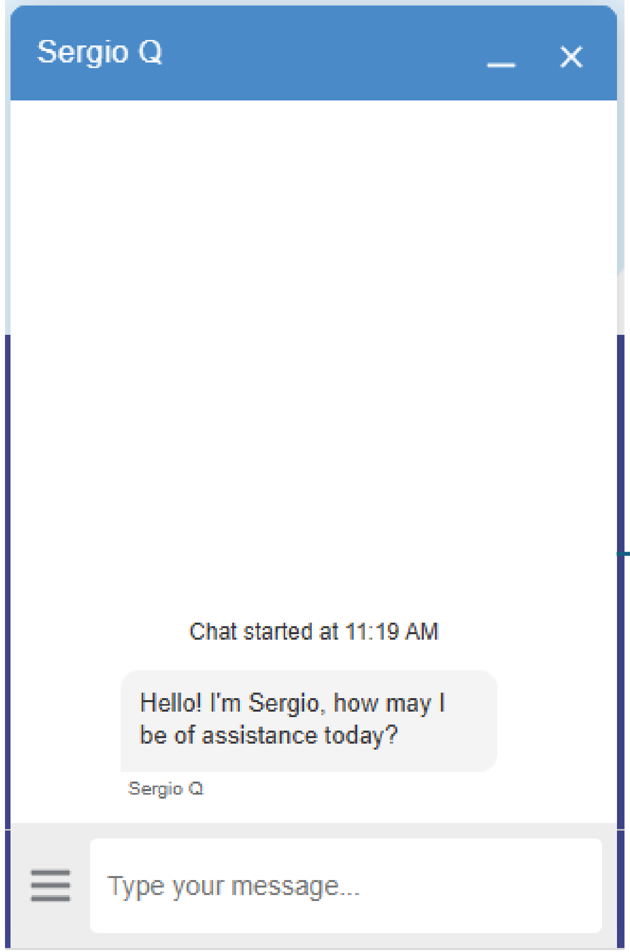
Technical issues related to **Profile**, **Invoice**, **Purchase Order**, **Catalog**, **Service/Time Sheet**, **ASN**, **Legal Entity**, **Remit-To**, **Merge Requests**, **Users**, **Notifications**, **Community** & **Other issues**, submit your contact request clicking on Start Chat.



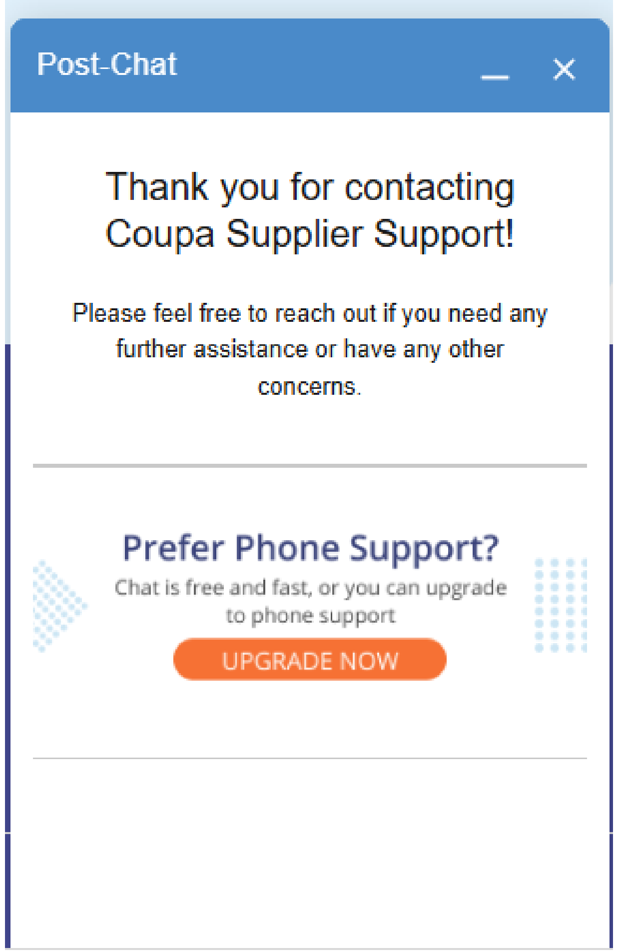
The system will let you know your place on the virtual line.



Describe your issue to the technical advisor and provide them the information required.



Once the chat is over, you will close and a summary may be sent to your email.



Note: If all support agents are busy or offline, you can submit a support request using an offline form in the same chat window.

Note: Your account information and login credentials are not stored, and support agents cannot log in to your CSP account. However, the information shared in the chat is recorded, so please do not provide unnecessary personal information.

Note: If no support agent is available, you must also specify the subject of your request and provide a detailed description of the issue. A message will then appear confirming that the case has been submitted and logged. A support agent will contact you as soon as possible.

Thank you for contacting Coupa Support!

If you need any additional assistance, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

Supplier Enablement Support

Coupa Supplier Portal (CSP)

Forward Ledcor's CSP Invite

1.Email Notification when Ledcor Invites a supplier to CSP, click on *'Forward this to someone'* is available.

New CSP Supplier SIM Invitation

Hello Supplier,

Ledcor Group wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

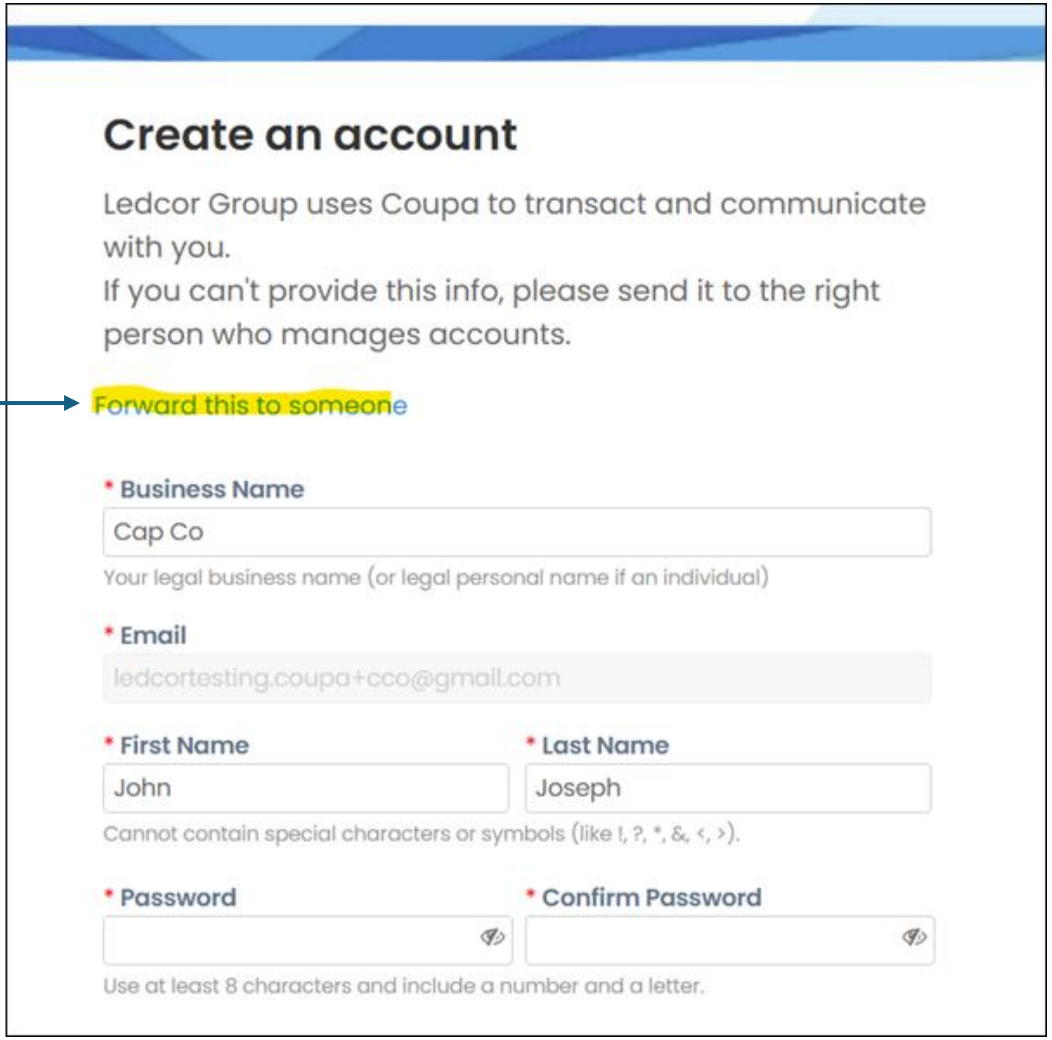
You can easily update your company information if it ever changes, as well as do things with *Ledcor Group* (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.

If you do not wish to sign up for the Coupa Supplier Portal, please contact supplierenablement@ledcor.com.

Welcome!

2. When you click the link to join, the “Forward this to someone” option is also available, click the blue letters.



3. Enter their email and click Forward.

4. When you select the Forward option and nominate a new email, they will receive same email as #1 (see below). And they also have the option to forward the invitation to someone else

coupa

New CSP Supplier SIM Invitation

Hello Supplier,

Ledcor Group wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

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To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.

If you do not wish to sign up for the Coupa Supplier Portal, please contact supplierenablement@ledcor.com.

Welcome!

Invitation links sent via CSP email expire after 30 days and are also invalidated if the inviter's account is deactivated.

If a customer sends an invitation to an inactive supplier user in CSP (a supplier already registered in Coupa but marked as inactive), the invitation will be rejected during processing.

To resolve this issue, the customer can either:

Ask the supplier to reactivate their CSP account, then resend the invitation, or

Send the invitation to a different email address associated with the same supplier.

For more information, see Manage Users.

Thank you for using Coupa Supplier Portal!

If you need any additional assistance, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

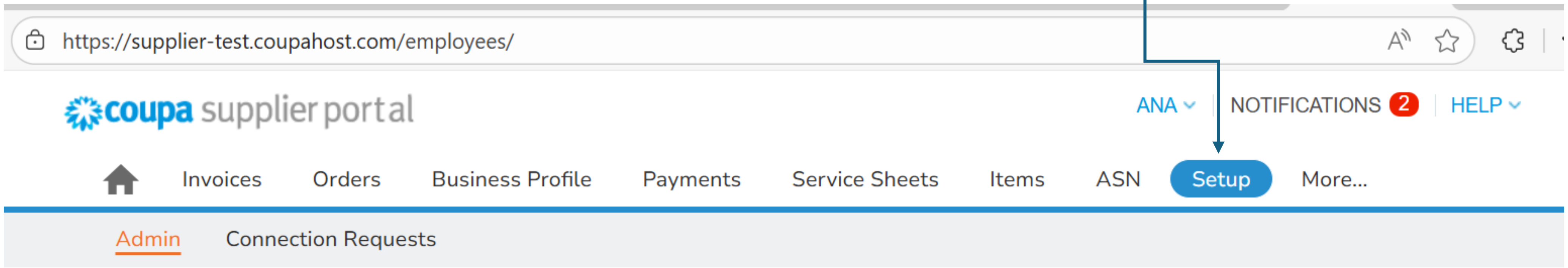
Supplier Enablement Support

Coupa Supplier Portal (CSP)

Merge Supplier CSP Accounts Guide

Merge Supplier CSP account Guide – Account Merge Requester view

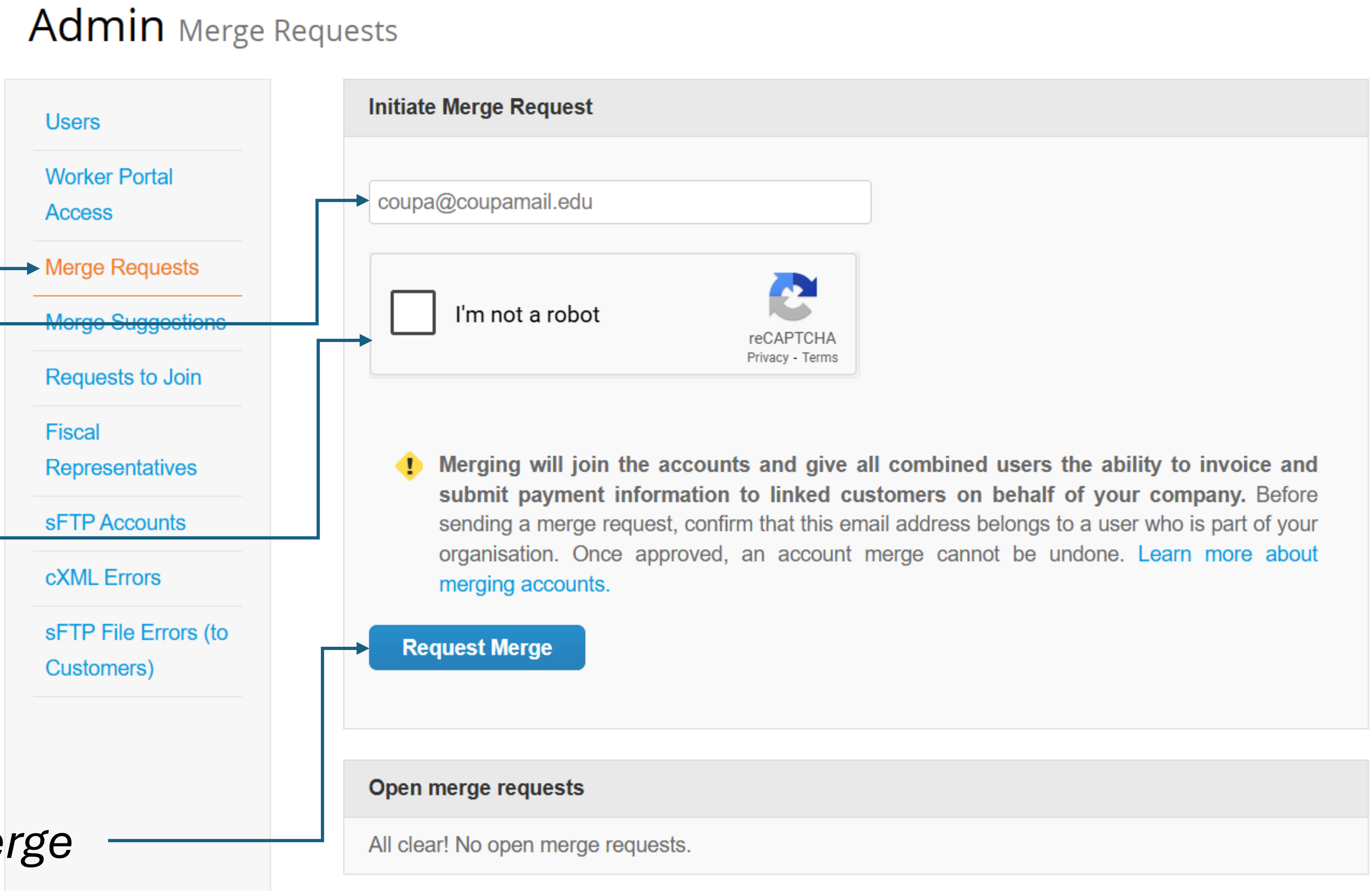
Sign in to your CSP account. On the home page, Click *Setup*.



Merge Supplier CSP account Guide – Account Merge Requester view

Click *Merge Requests*

Enter the email address of the owner of the account you want to merge.
Select *I am not a robot*.
This may also include correctly completing a CAPTCHA.

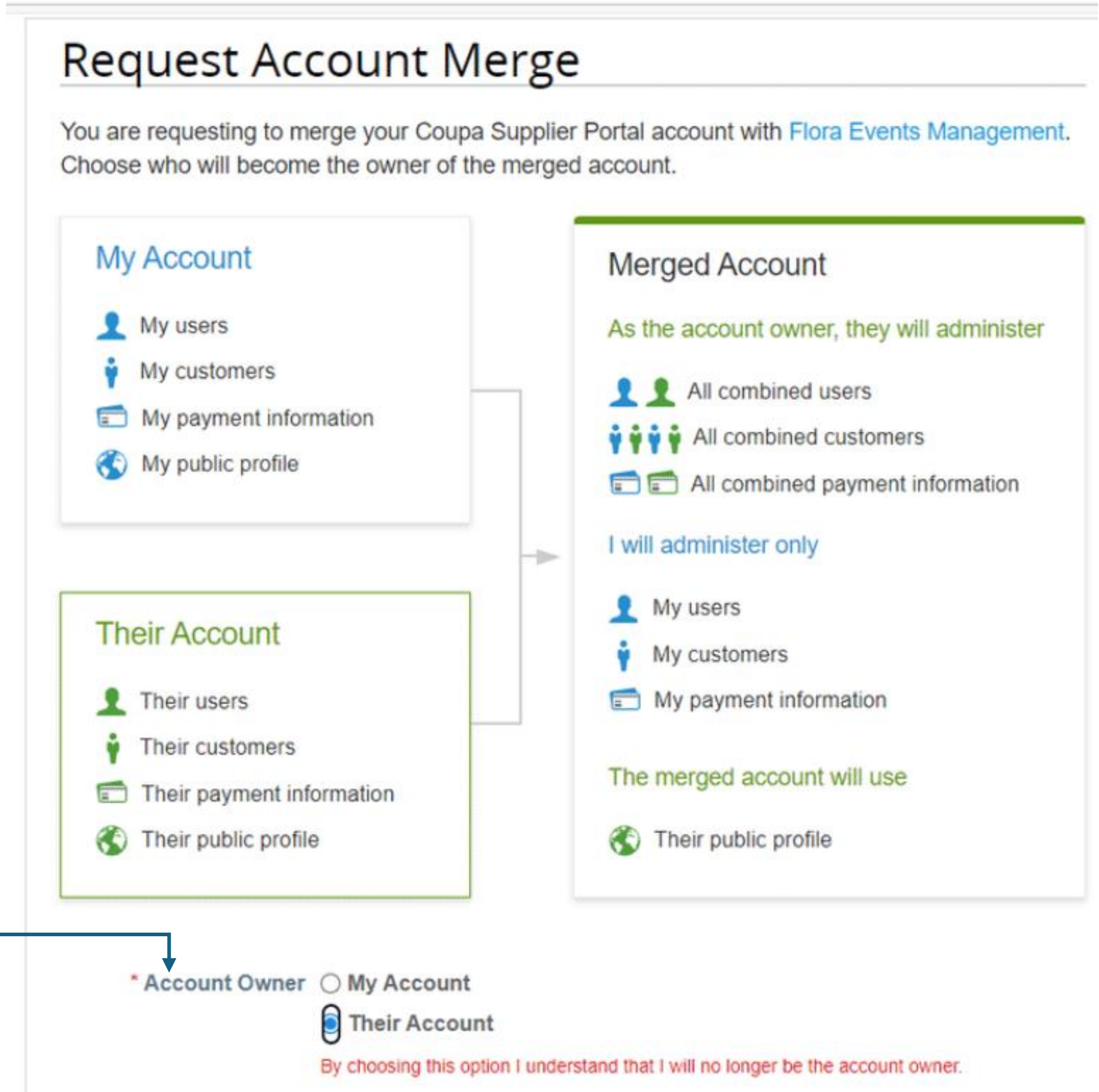


Click *Request Merge*

Merge Supplier CSP account Guide – Account Merge Requester view

The next screen will display the details of the access you will obtain by selecting an ******Account Owner*.

Scroll down to select *My Account* or *Their Account*.

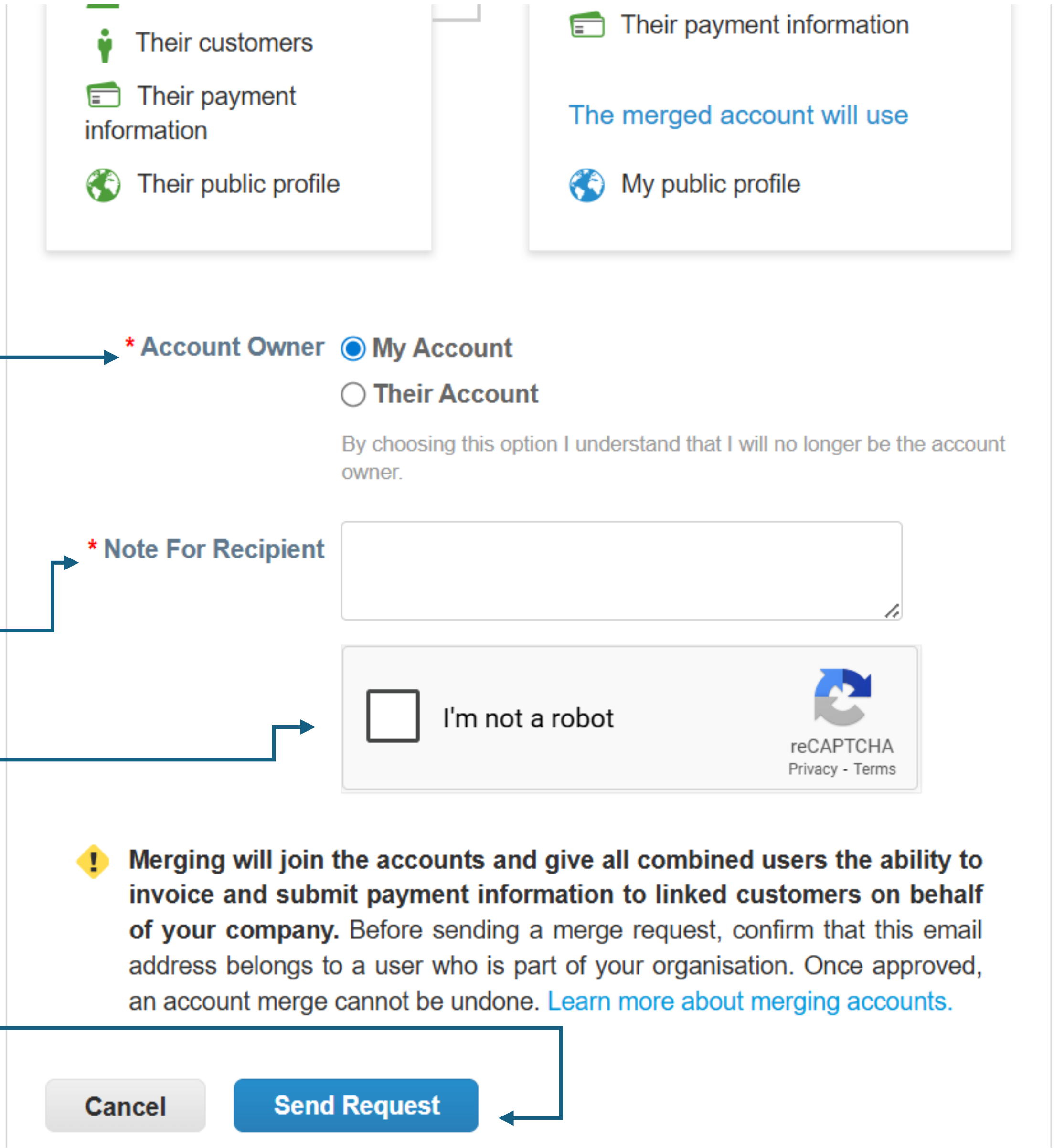


Merge Supplier CSP account Guide – Account Merge Requester view

Select *My Account*: To become the account owner of the merged accounts. Select *Their Account* to administer only your profile and assigned customers, you will no longer be the owner of the CSP account.

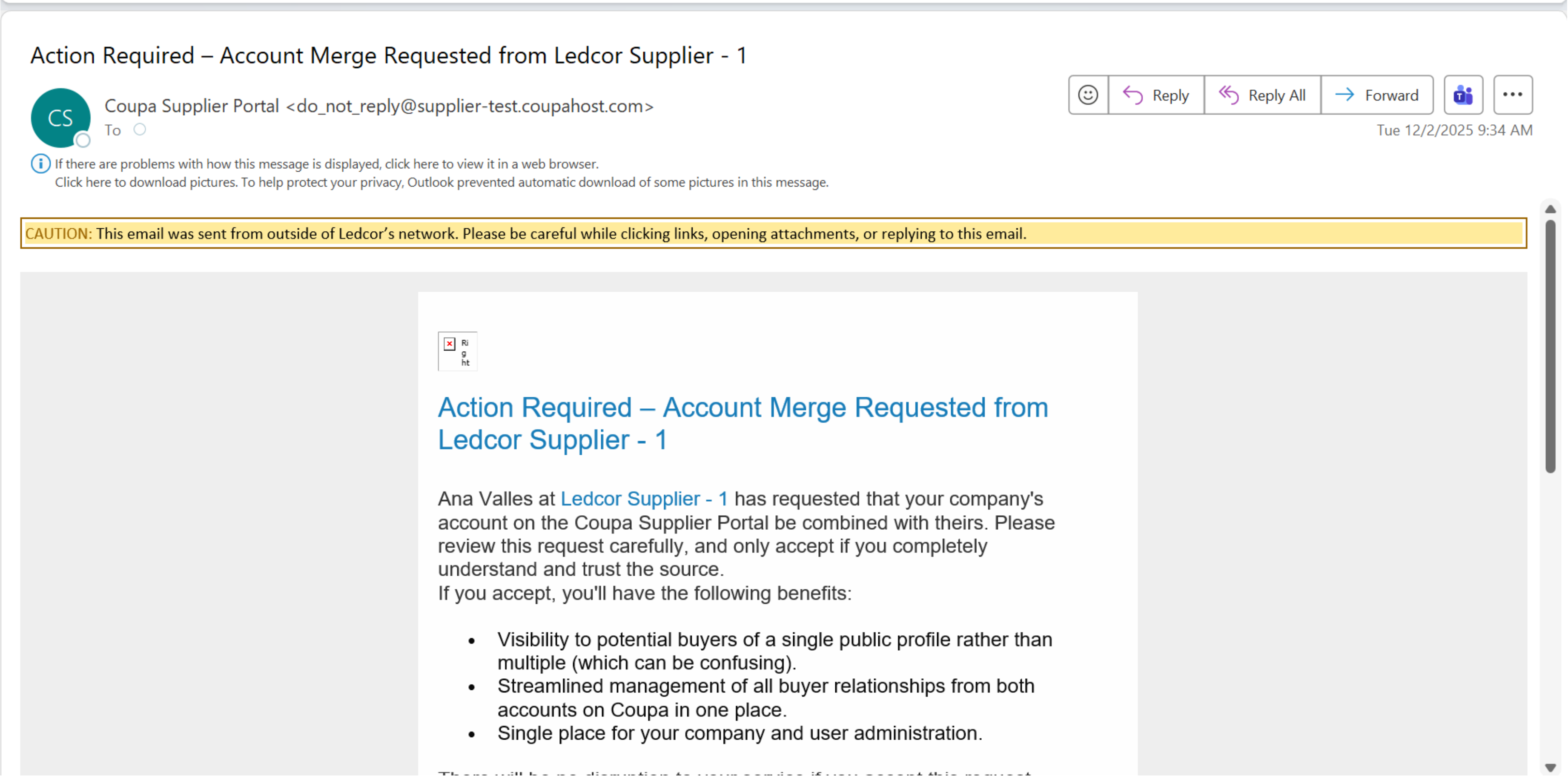
**Note For Recipient*: Enter a message to the recipient of this request.
Select *I am not a robot*. This may also include correctly completing a CAPTCHA.

Click *Send Request*



Merge Supplier CSP account Guide – Recipients View

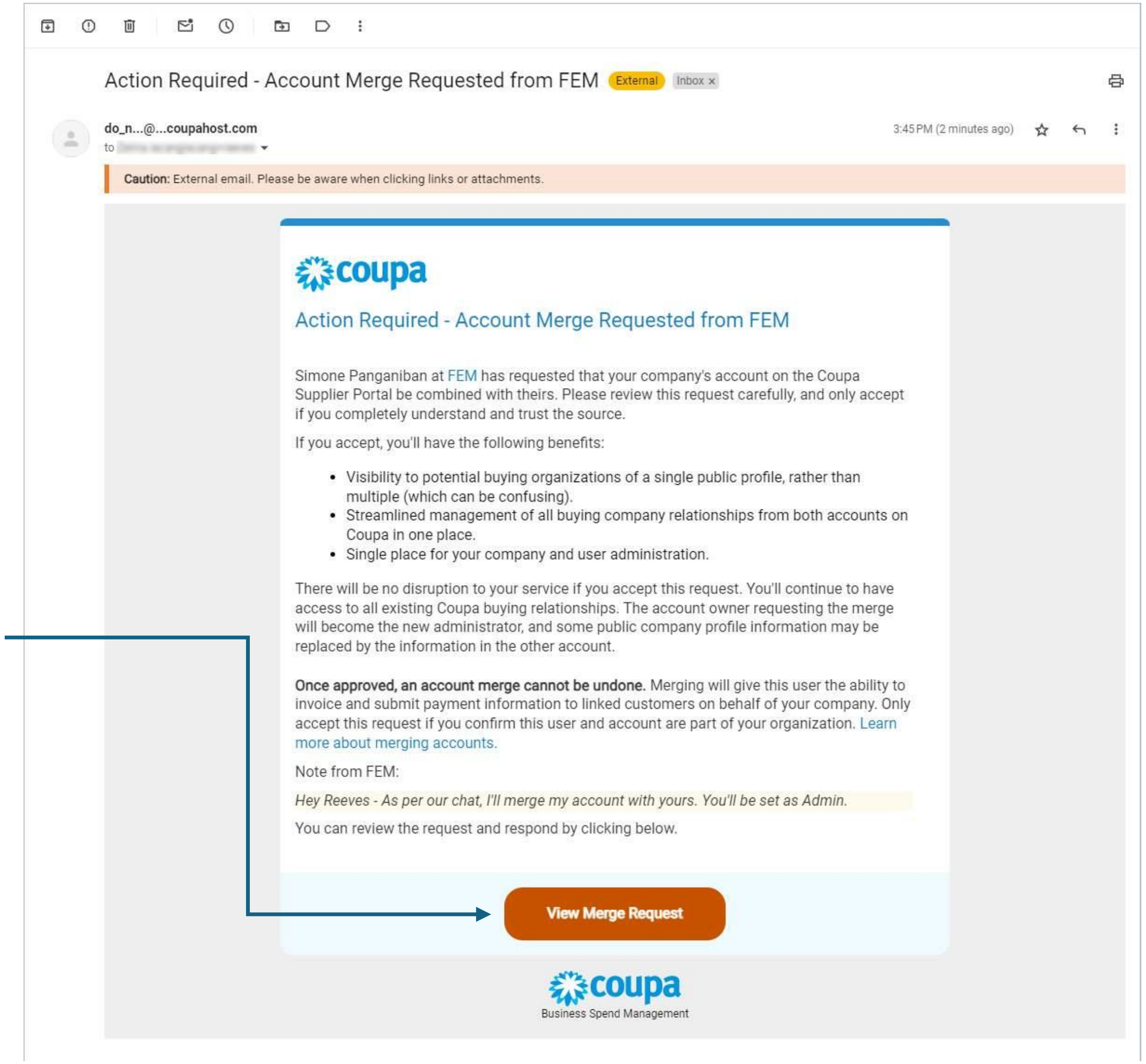
If email notifications are enabled, the recipient of this request will receive an email notification.



Merge Supplier CSP account Guide – Recipients View

If email notifications are enabled, the recipient of this request will receive an email notification.

The recipient can click *View Merge Request* to go to the CSP.

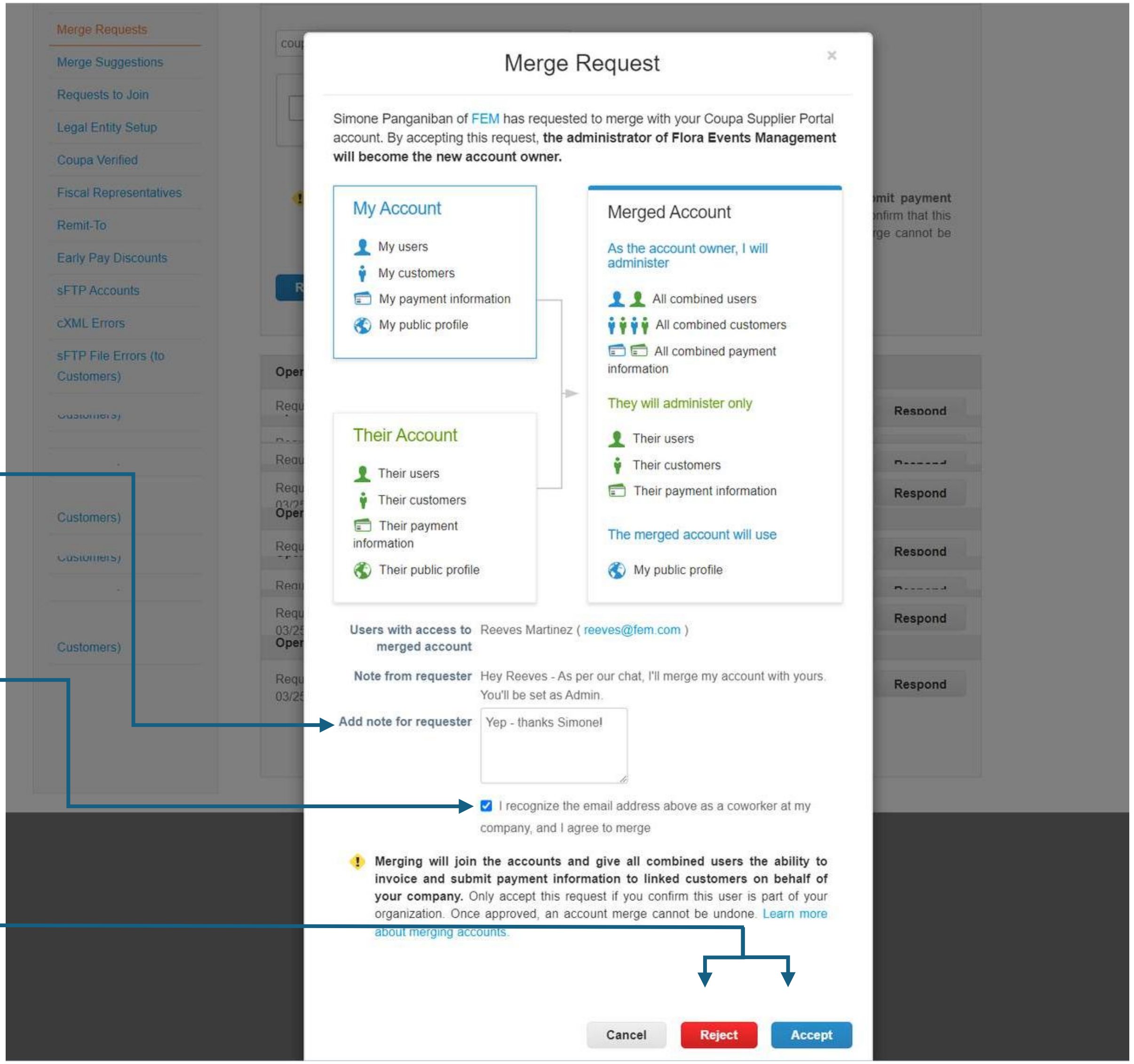


Merge Supplier CSP account Guide – Recipients View

The recipient can review the merge details including data access, users, and sender’s original request message.

The recipient can enter a message to the sender in the *Add note for requester field*. The recipient must select *I recognize the email address above as a coworker at my company and I agree to merge.*

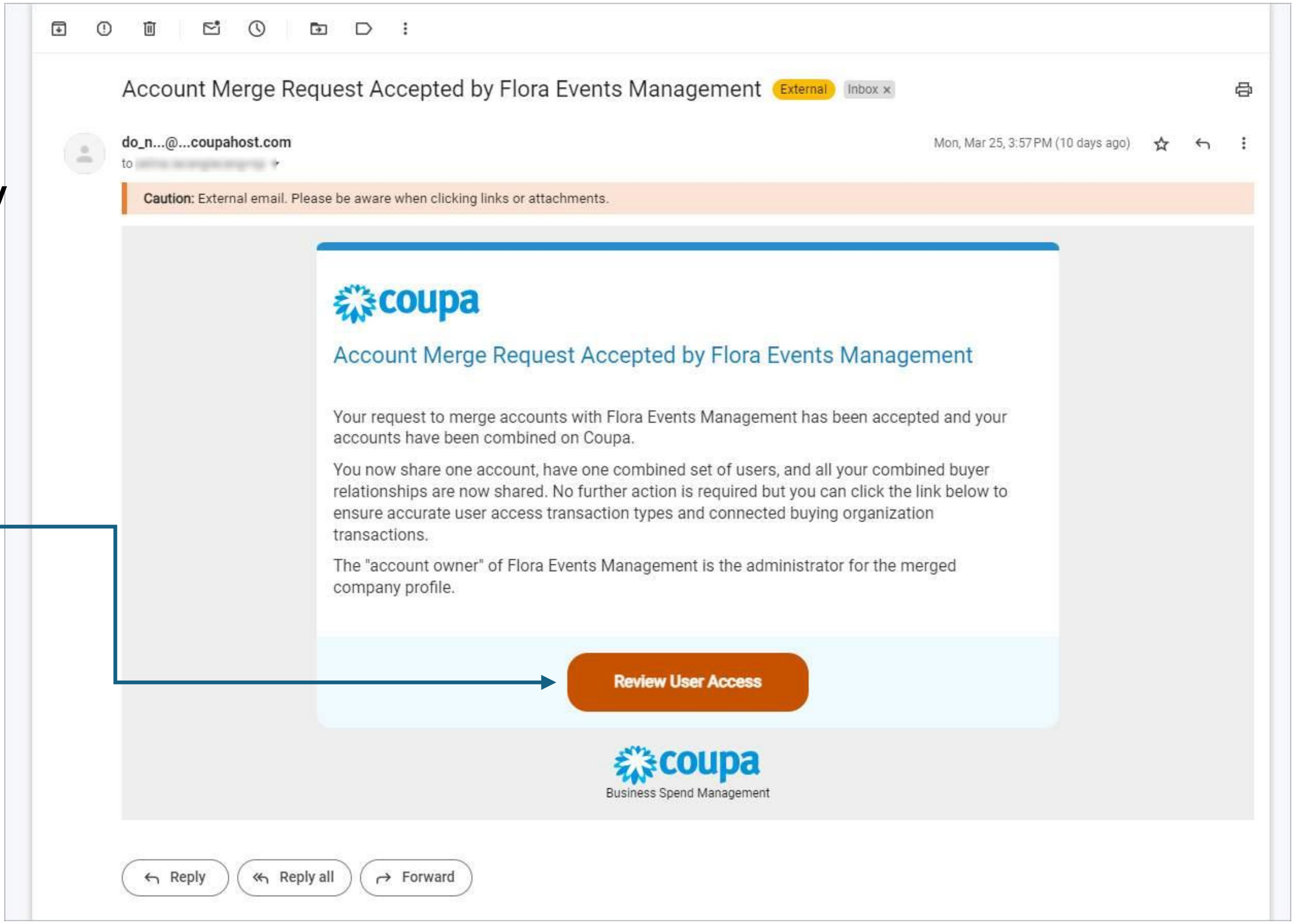
When ready, the recipient will click *Accept*.
If the recipient chooses not to merge, they will click *Reject*



Merge Supplier CSP account Guide – Account Merge Requester

The sender will receive notification when the request has been accepted by recipient.

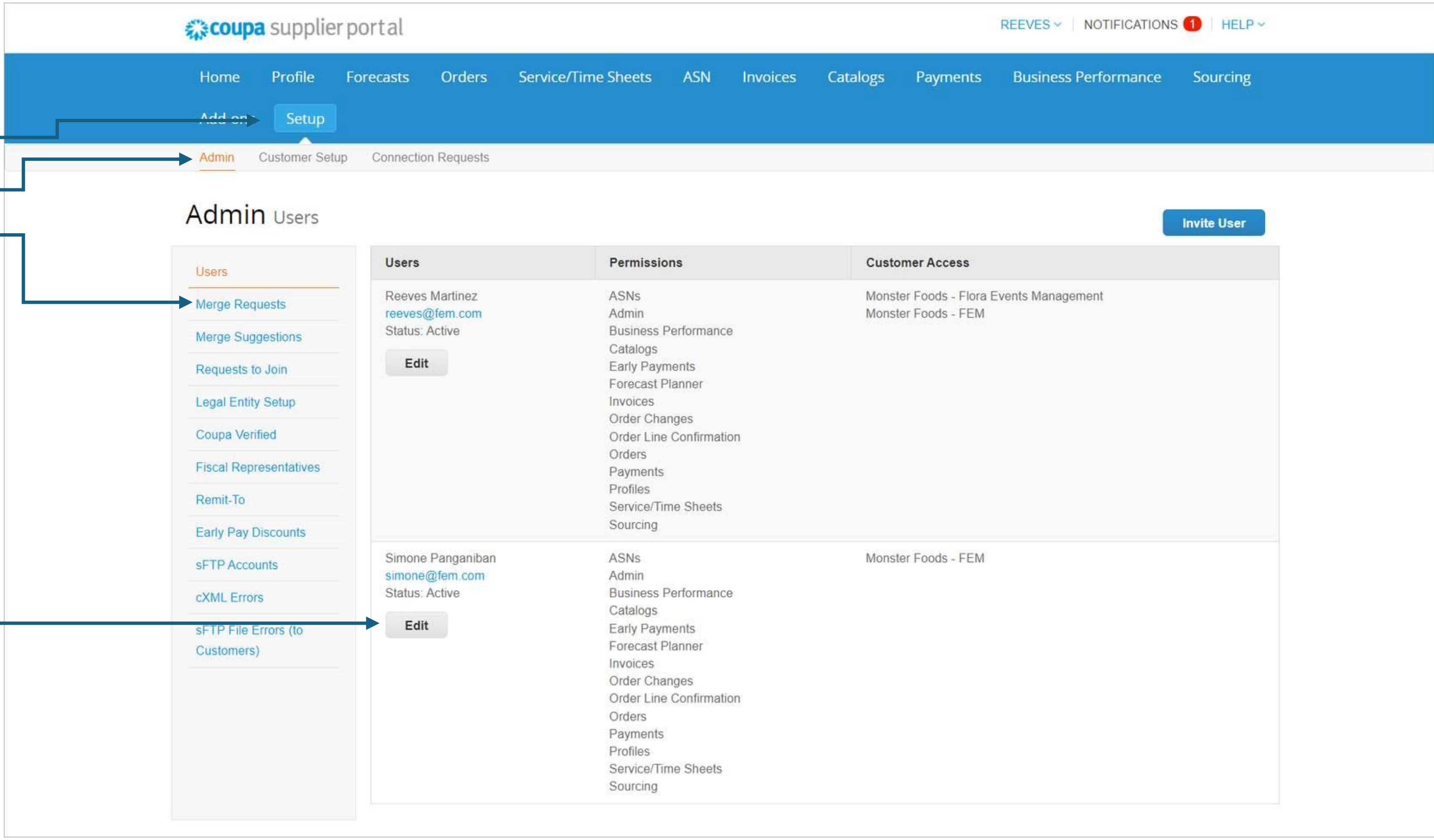
Click *Review User Access* to go to the CSP.



Merge Supplier CSP account Guide – Merge Finalized

In CSP, Click on *Setup*
Click on *Admin*,
And, in the *Users* section you can see differences in permissions and customer access.

You can edit any users' details by clicking *Edit*.



Thank you for using CSP!

If you need any additional support, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

Supplier Enablement Support

Coupa Supplier Portal (CSP)

Add and Edit Users or Roles

Manage CSP Roles

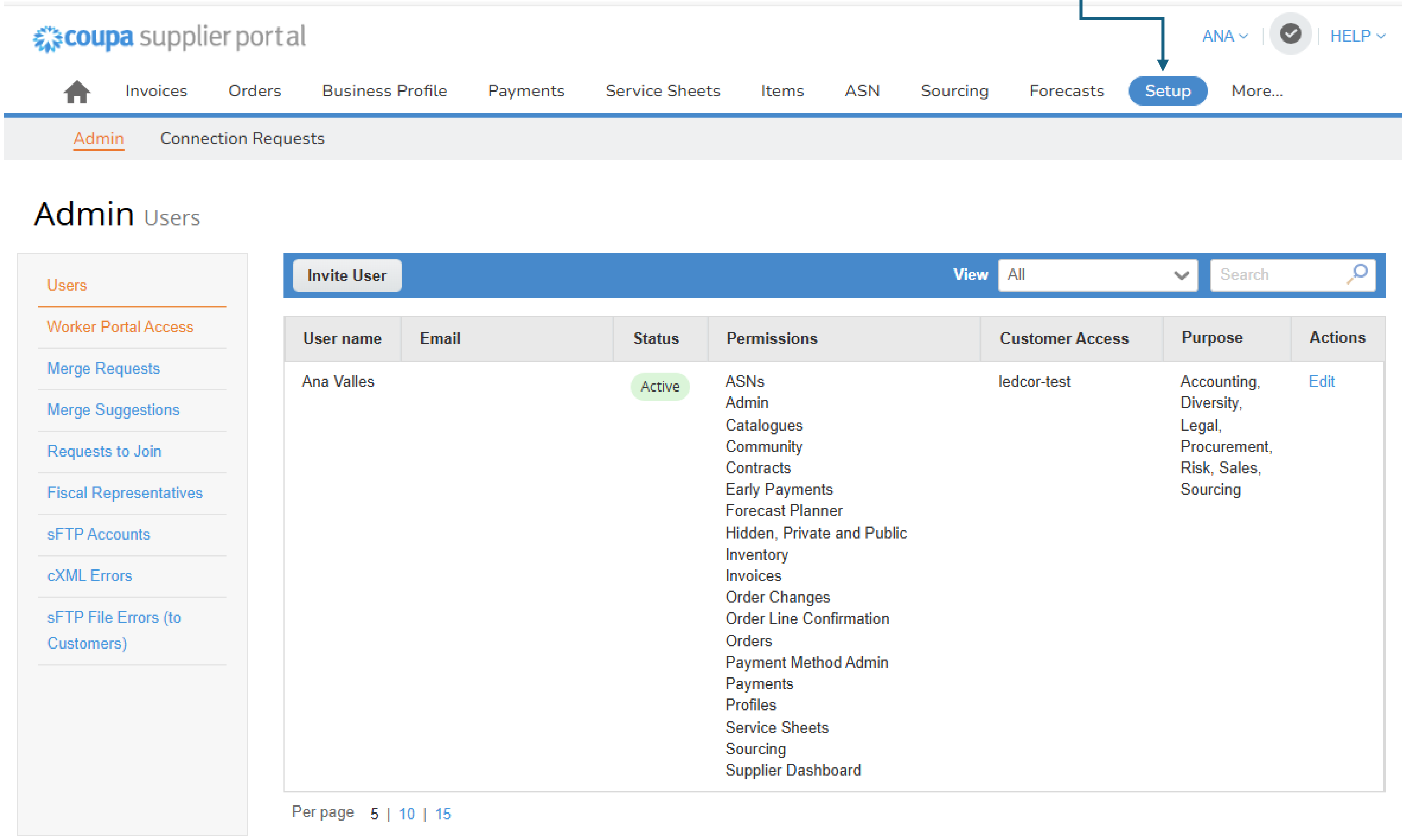
The *Admin* page in the *Setup* tab lists all CSP users and their permissions. When assigning or updating access:

- Align permissions with job roles. Limit actions like creating invoices, accessing service and time sheets, or managing the *Setup* or *Payments* tabs to appropriate users.
- Control customer access. Grant users access only to the customers they need, whether all, a few, or just one.
- Review access regularly. Audit user permissions to ensure they remain appropriate for each role.

To stay informed of changes, you can set up notifications for events such as:

- New account access
- Payment access granted to a user
- New customer connections created

Sign in to your CSP account. On the home page, Click *Setup*.

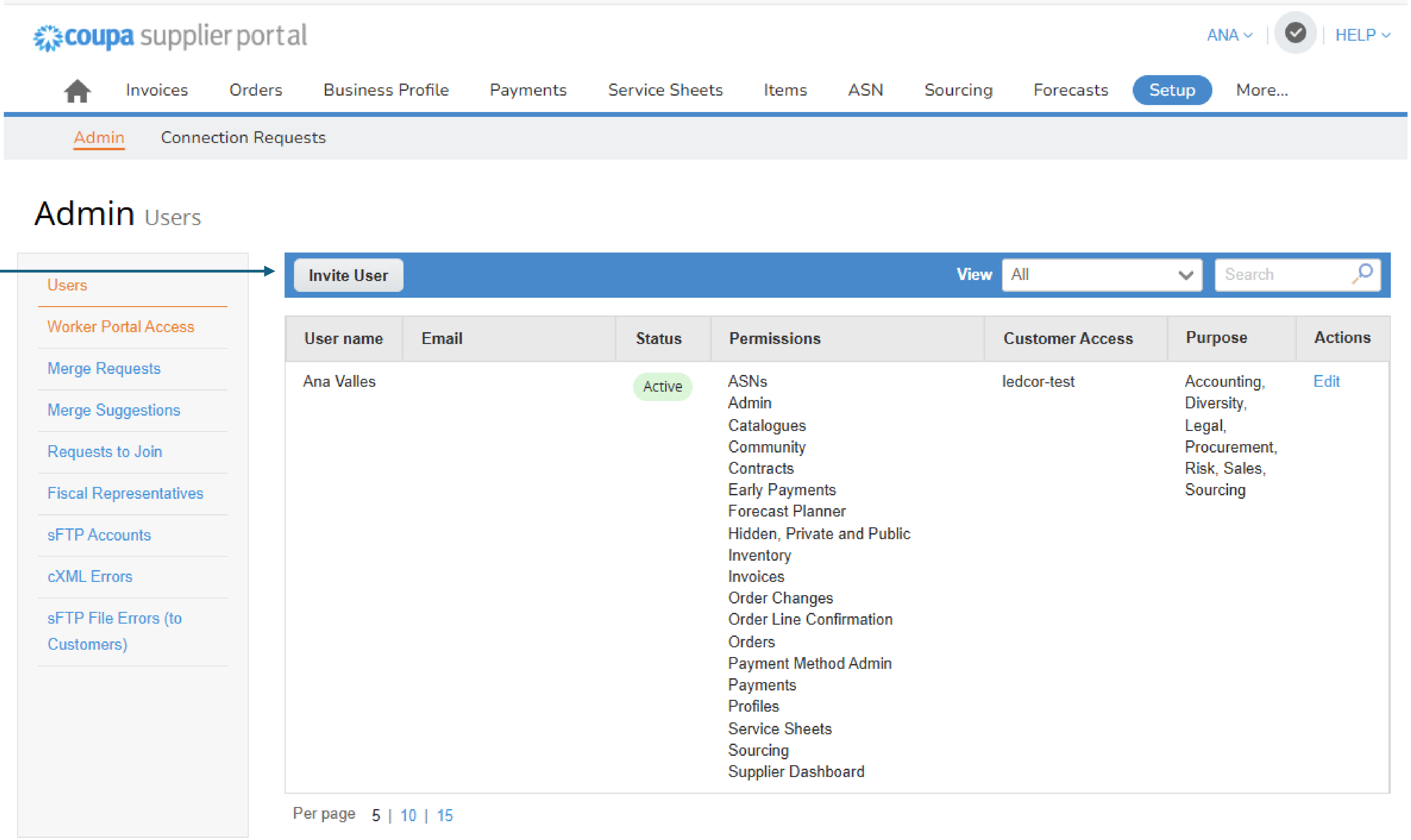


Only users with *Admin* permission can access the *Setup* tab. From there, you can manage sensitive company information such as legal entities, early payment discounts, and more.

1. Add or Invite a User

Click *Invite User*

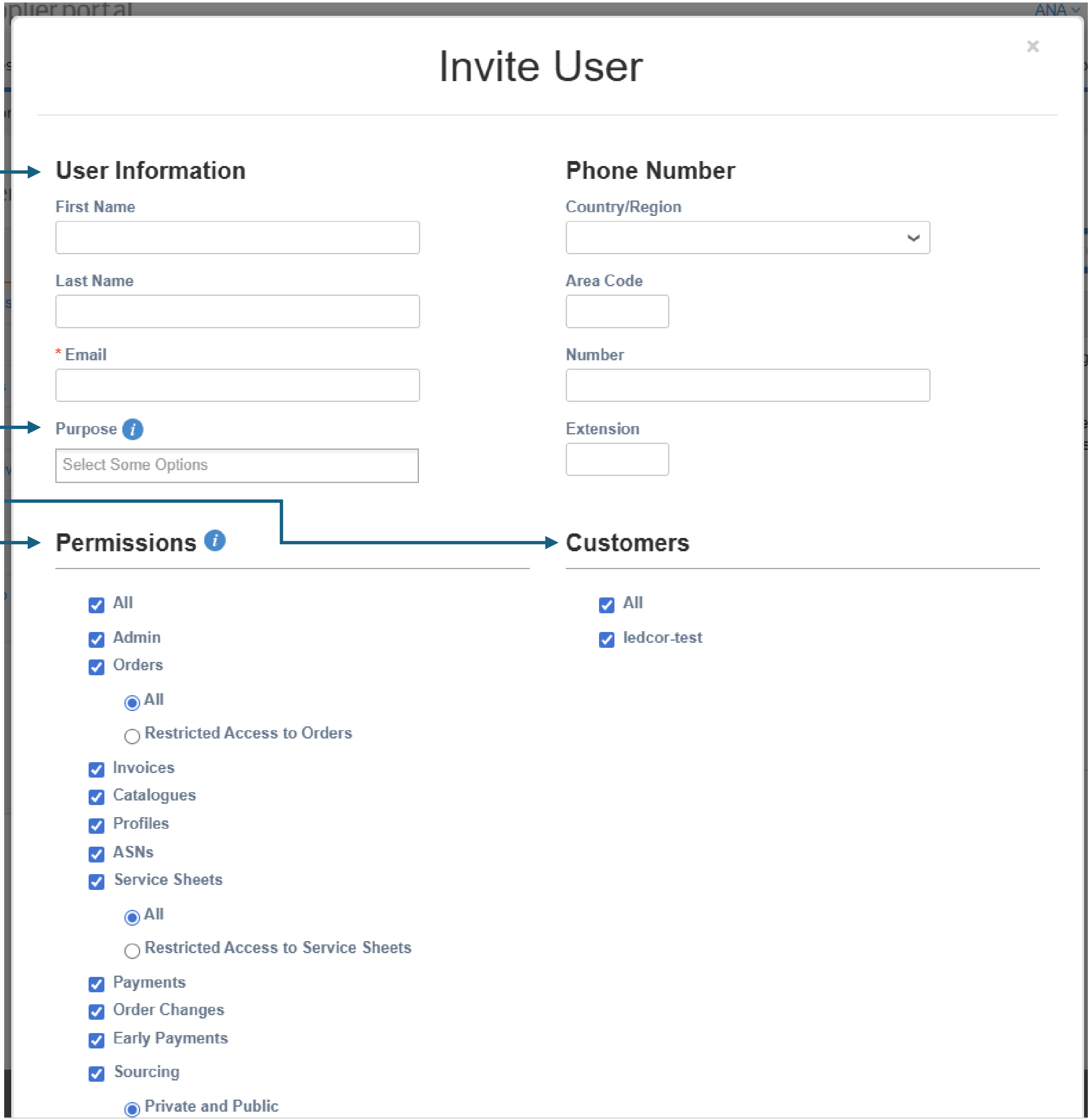
The *Invite User* pop-up window will open.



Complete the fields on the **Invite User** pop-up window.

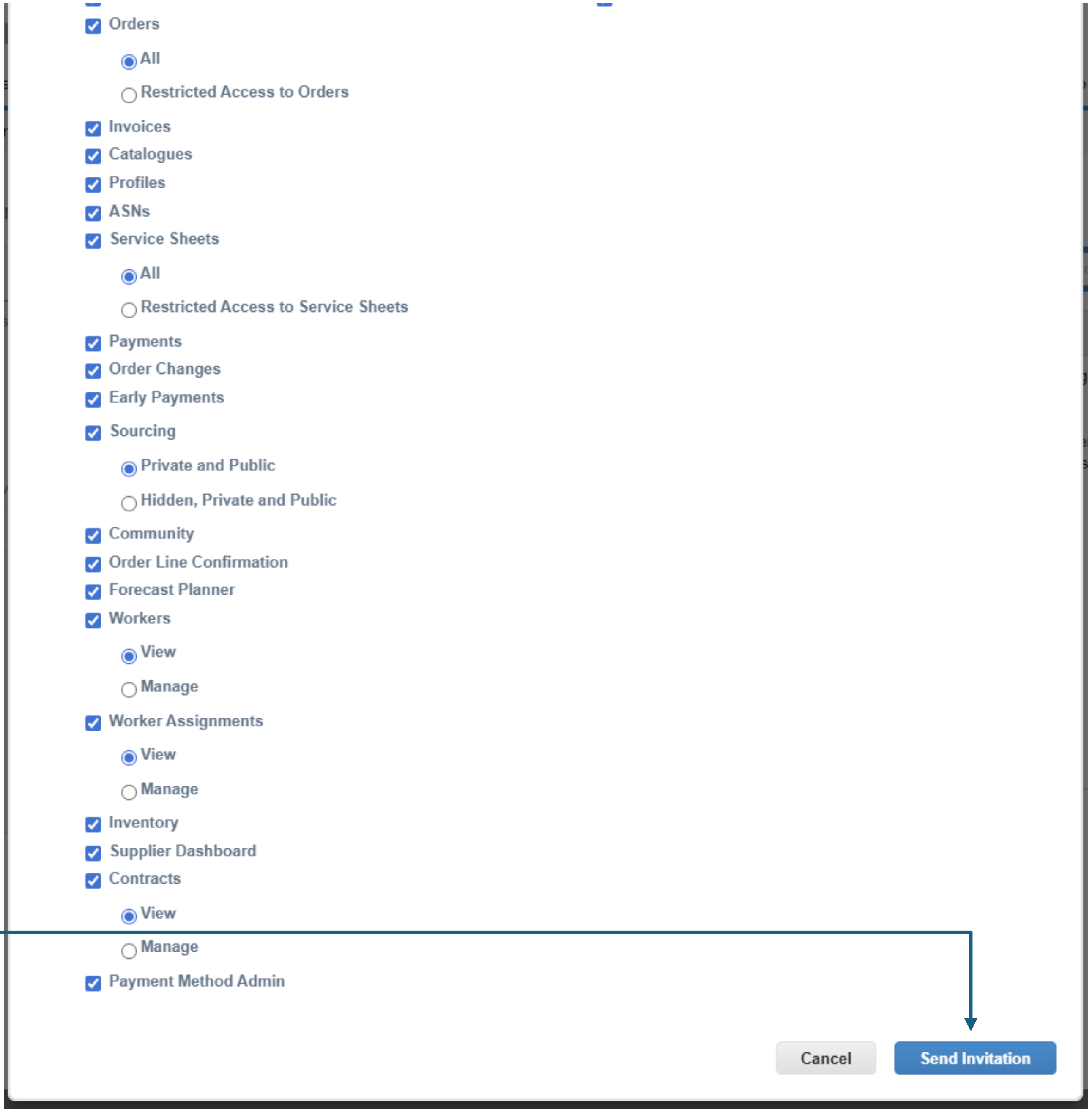
Click the information icons below to learn more.

Provide the user access to all the *Permissions* and *Customers* applicable.



Scroll down to see the full list permissions.

Click *Send Invitation*



The invited user will receive an email like the one below to accept the invitation and join the CSP.

Action Required – Join the Coupa Supplier Portal

Hi Ana

A coworker invited you to join their account on Coupa. Once you have registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions and much more.

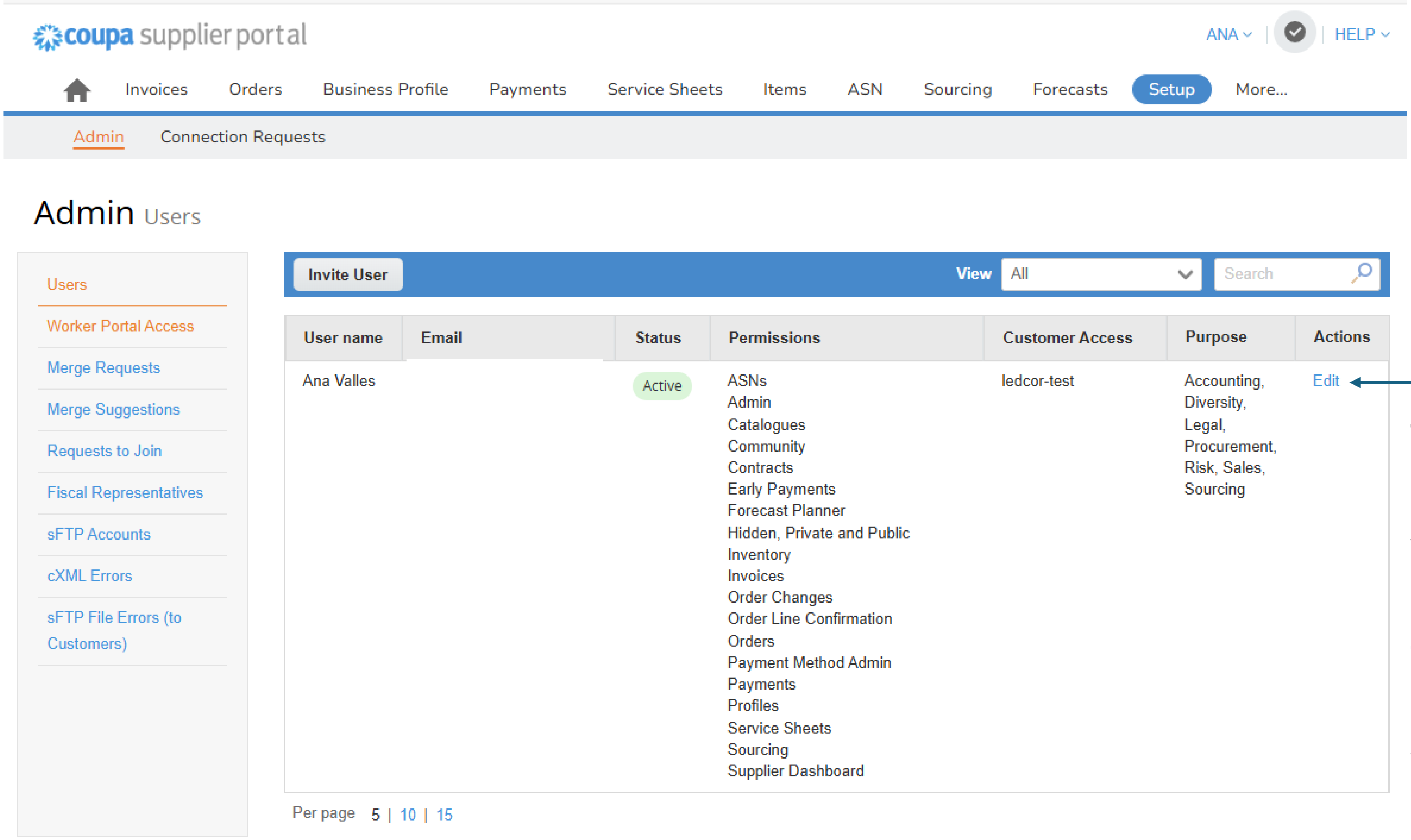
Find out more using the links below, and use the button to register. Welcome!

Join Coupa Supplier Portal

Business Spend Management

2. Edit Users

From the Admin page, locate the user whose permissions you would like to edit.



Click *Edit*

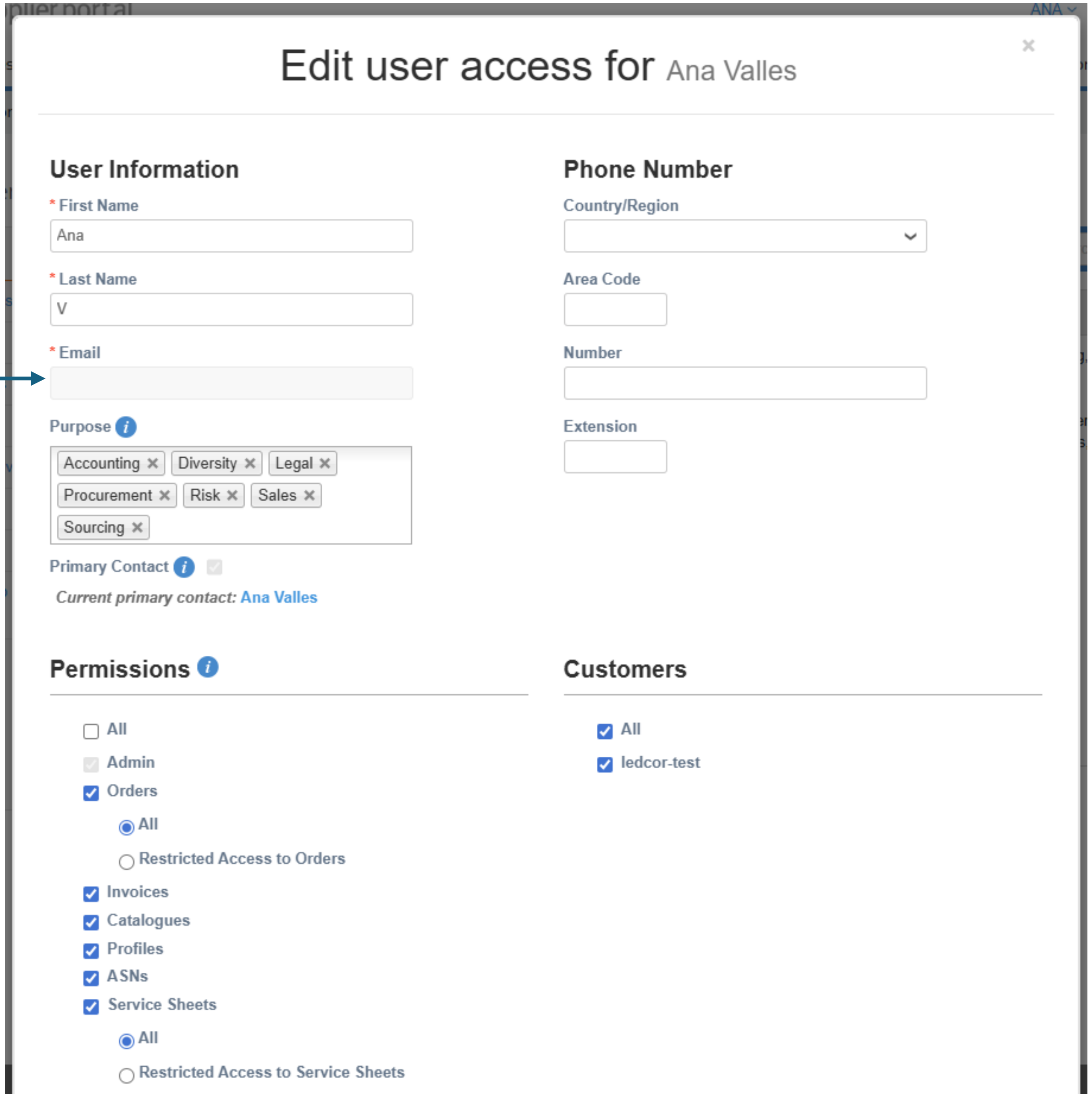
The *Edit user access* pop-up window will open and is like the *Invite User* pop-up window.

From the pop-up window you can:

- Change the first and/or last name of the user.
- Enable or disable permissions.
- Enable or disable their access to a customer.
- Deactivate or reactivate the user.

Update an Email Address

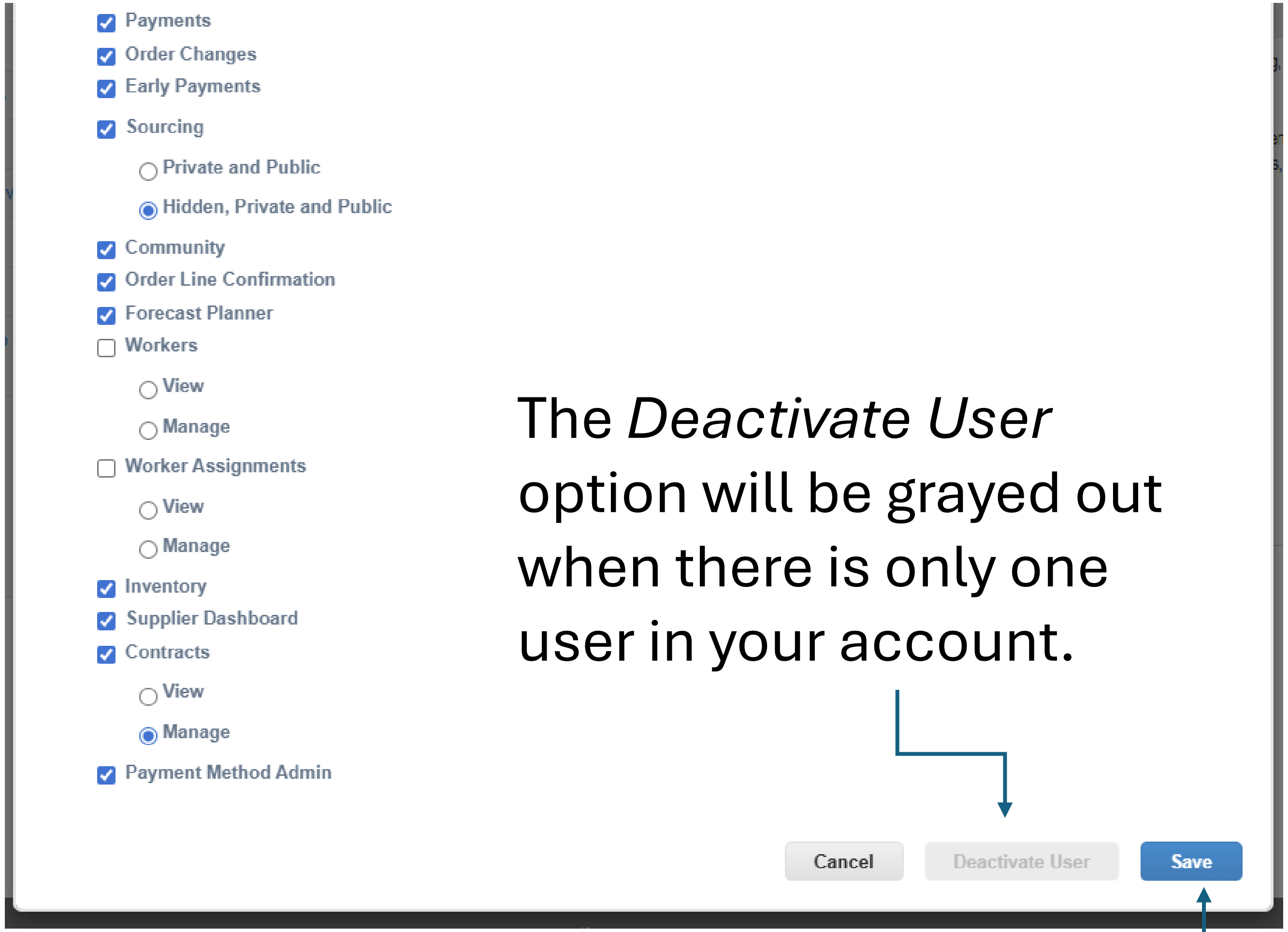
The *Email address* field is grayed out from this window.



If the email address needs to be updated:

1. You must send an invitation to the user's updated email address. This will add the updated email address as an additional user.

2. Deactivate the user with the outdated email address from the *Edit user access* pop-up window.



The *Deactivate User* option will be grayed out when there is only one user in your account.

Once the changes are complete click *Save*.

Inactive CSP User Accounts

A user’s CSP account status will automatically change to *Inactive* if:

- They have not verified their account for six months or,
- If they have not logged in to the CSP for more than 90 days.

When the user tries to log in to the CSP, an email is sent with instructions on how to reactivate their account.

Thank you for using CSP!

If you need any additional assistance, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

Supplier Enablement Support

coupa supplier portal

LEDCOR GROUP

Coupa Supplier Portal (CSP)

Share a Payment Method on the CSP.

Notes:

Please share **only payment methods in USD or CAD** with Ledcor.

If you have previously shared payment methods with Ledcor in any other currency, please unshare them.

Instructions on how to unshare payment methods are included in this guide.

We will also provide instructions on how to create a new payment method.

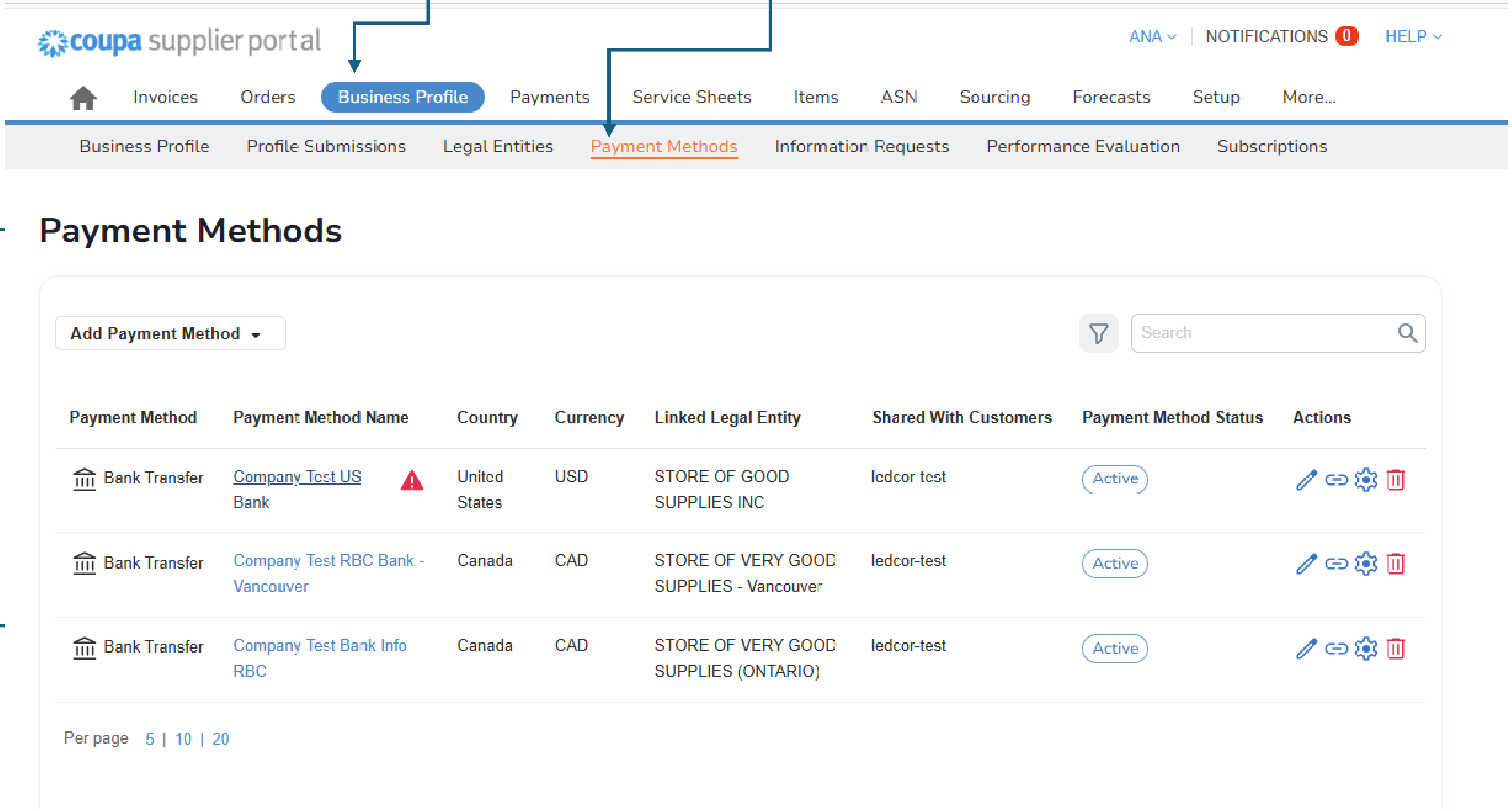
However, please ensure that the payment method you share with Ledcor matches the one provided in the Supplier Questionnaire (Form 1B).

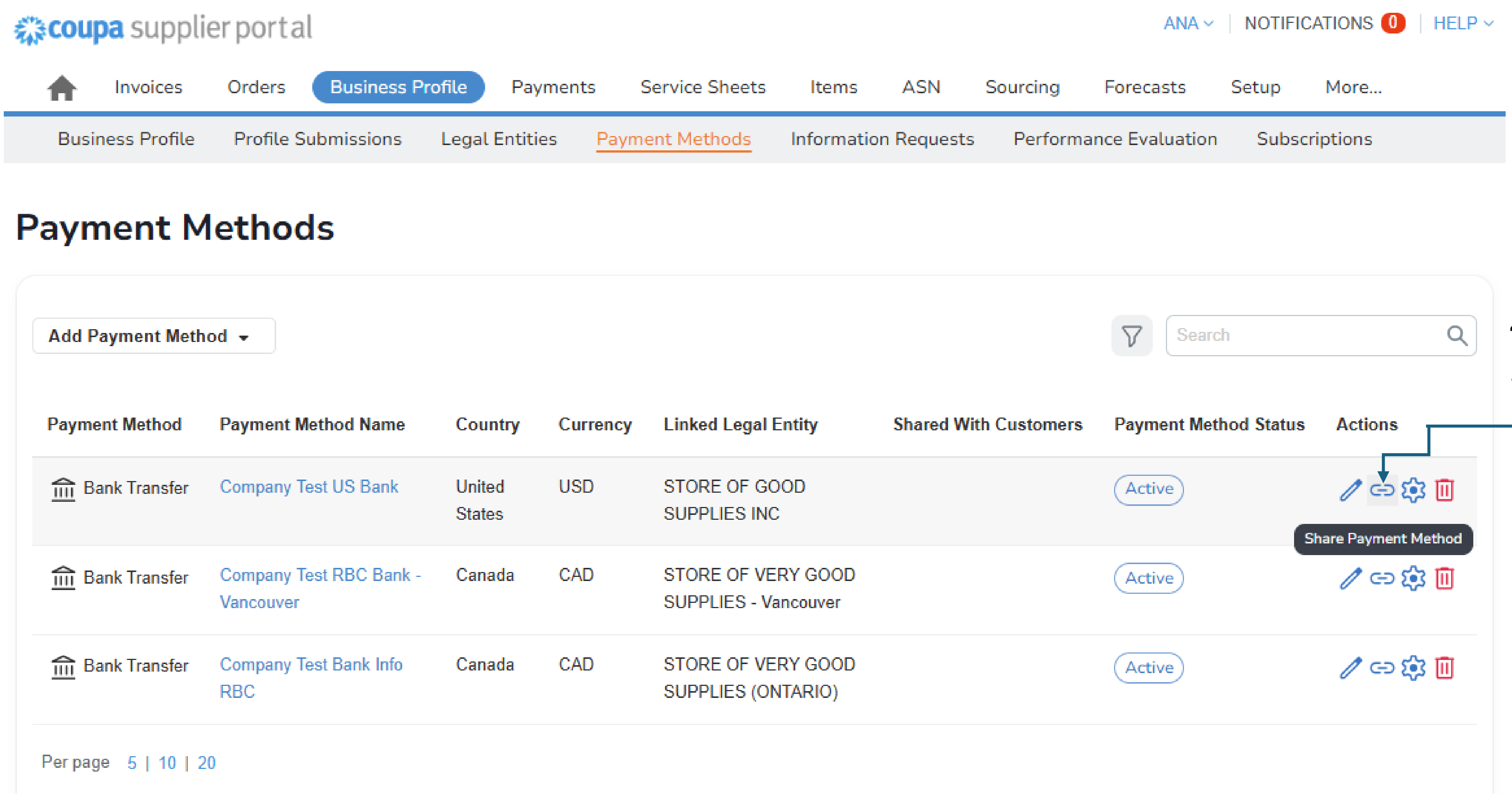
Share a Payment Method on the CSP.

1. Log in to Coupa Supplier Portal and from the Home page click on *Business Profile*

2.A second raw of tabs will open, click on *Payment Methods*

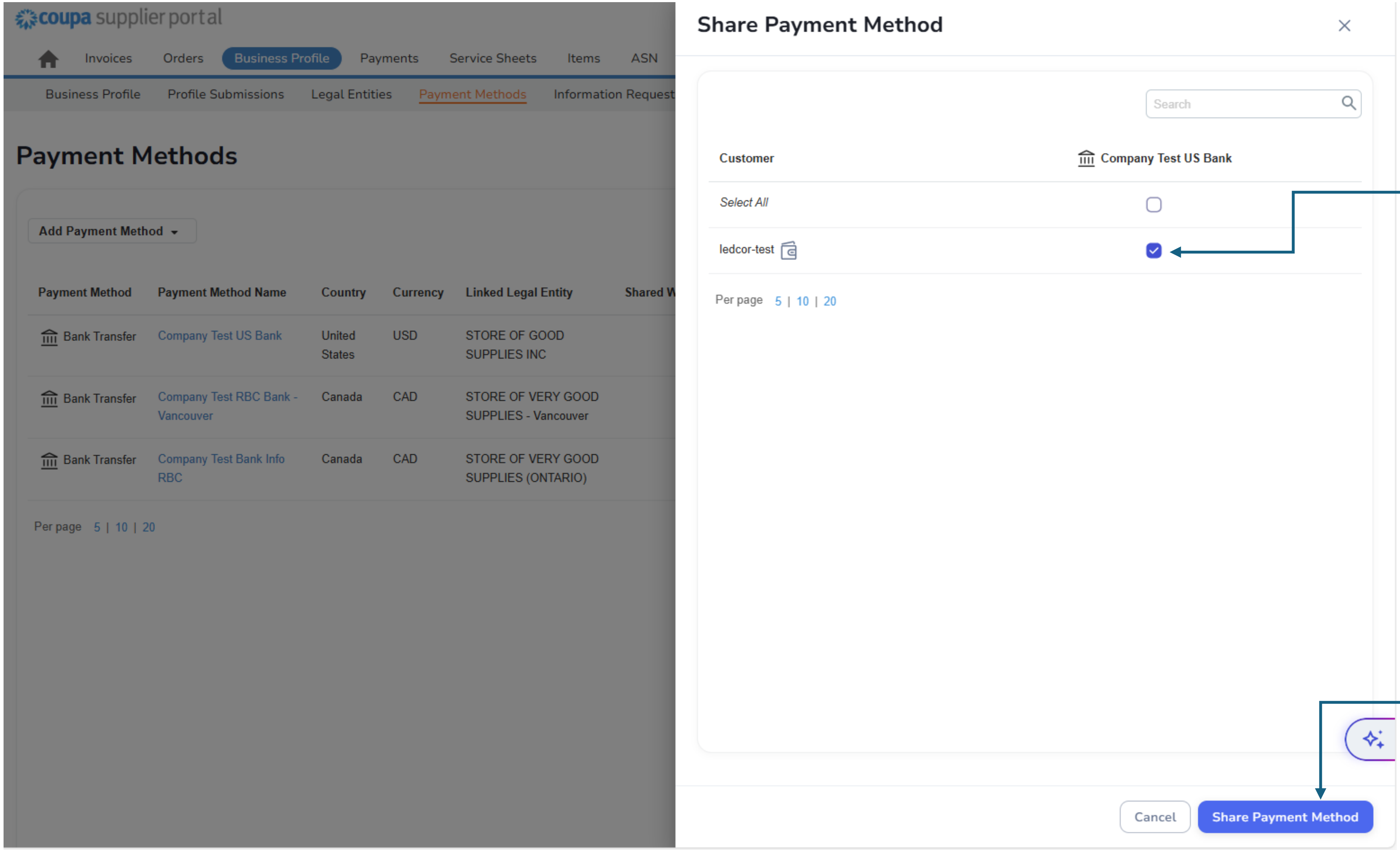
3. The list of your payment methods will open.





4. Click the *Share Payment Method* button

The next window will open with the list of your customers linked in Coupa.



6. Check the box to share your payment method with Ledcor.

7. Click *Share Payment Method*

The confirmation message will display, and you have shared your payment method with Ledcor.

Payment Methods

Sharing process for Company Test US Bank has started. We will notify you by email if there are any issues with the sharing.

Add Payment Method

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Company Test US Bank	United States	USD	STORE OF GOOD SUPPLIES INC	ledcor-test	Active	
Bank Transfer	Company Test RBC Bank - Vancouver	Canada	CAD	STORE OF VERY GOOD SUPPLIES - Vancouver		Active	
Bank Transfer	Company Test Bank Info RBC	Canada	CAD	STORE OF VERY GOOD SUPPLIES (ONTARIO)		Active	

Per page 5 | 10 | 20

Unshare a Payment Method on the CSP.

1. Locate the payment method you wish to unshare and click on *Manage Linked Customers* button

Payment Methods

Add Payment Method

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Company Test US Bank	United States	USD	STORE OF GOOD SUPPLIES INC	ledcor-test	Active	
Bank Transfer	Company Test RBC Bank - Vancouver	Canada	CAD	STORE OF VERY GOOD SUPPLIES - Vancouver		Active	
Bank Transfer	Company Test Bank Info RBC	Canada	CAD	STORE OF VERY GOOD SUPPLIES (ONTARIO)		Active	

Manage Linked Customers

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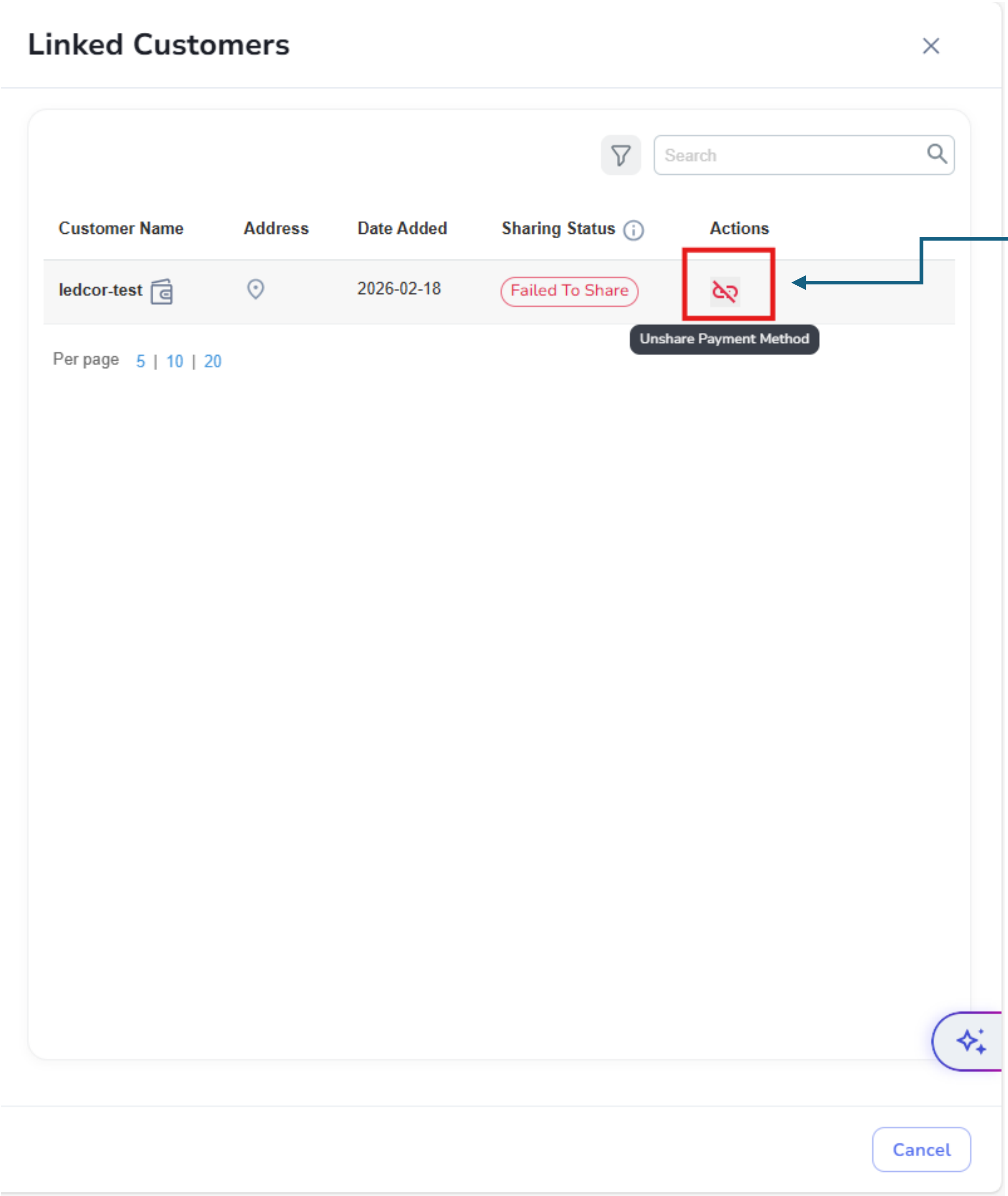
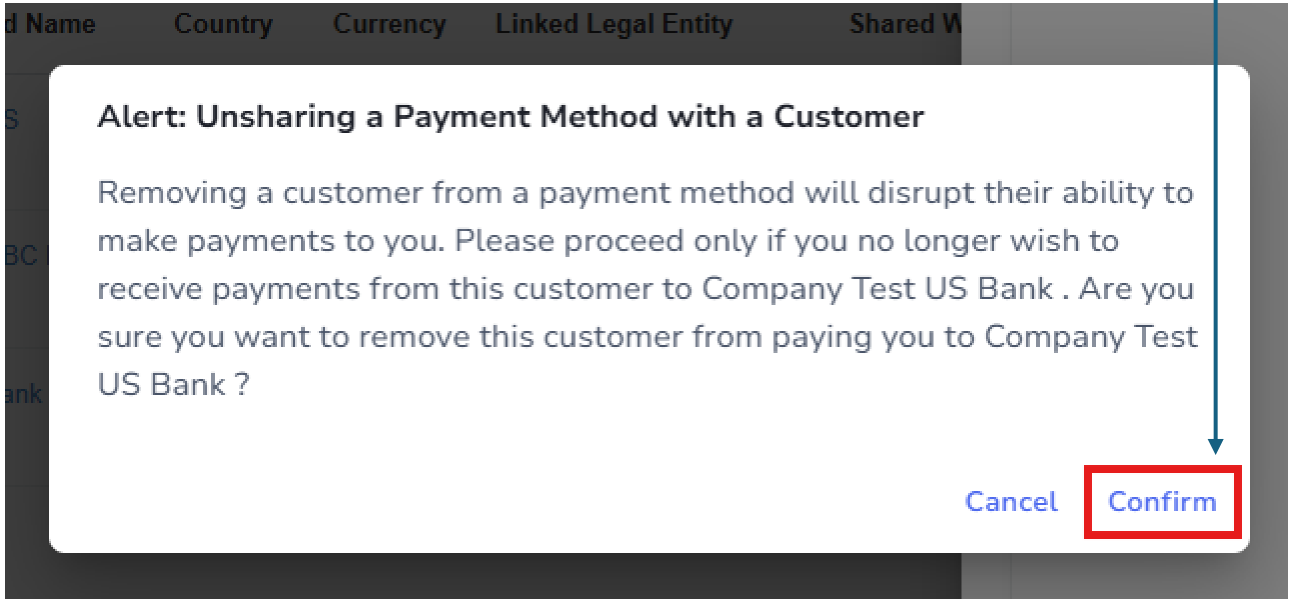


2. Click *Unshare Payment Method* on the Actions column for the Customer Ledcor.

3. Click *Confirm*

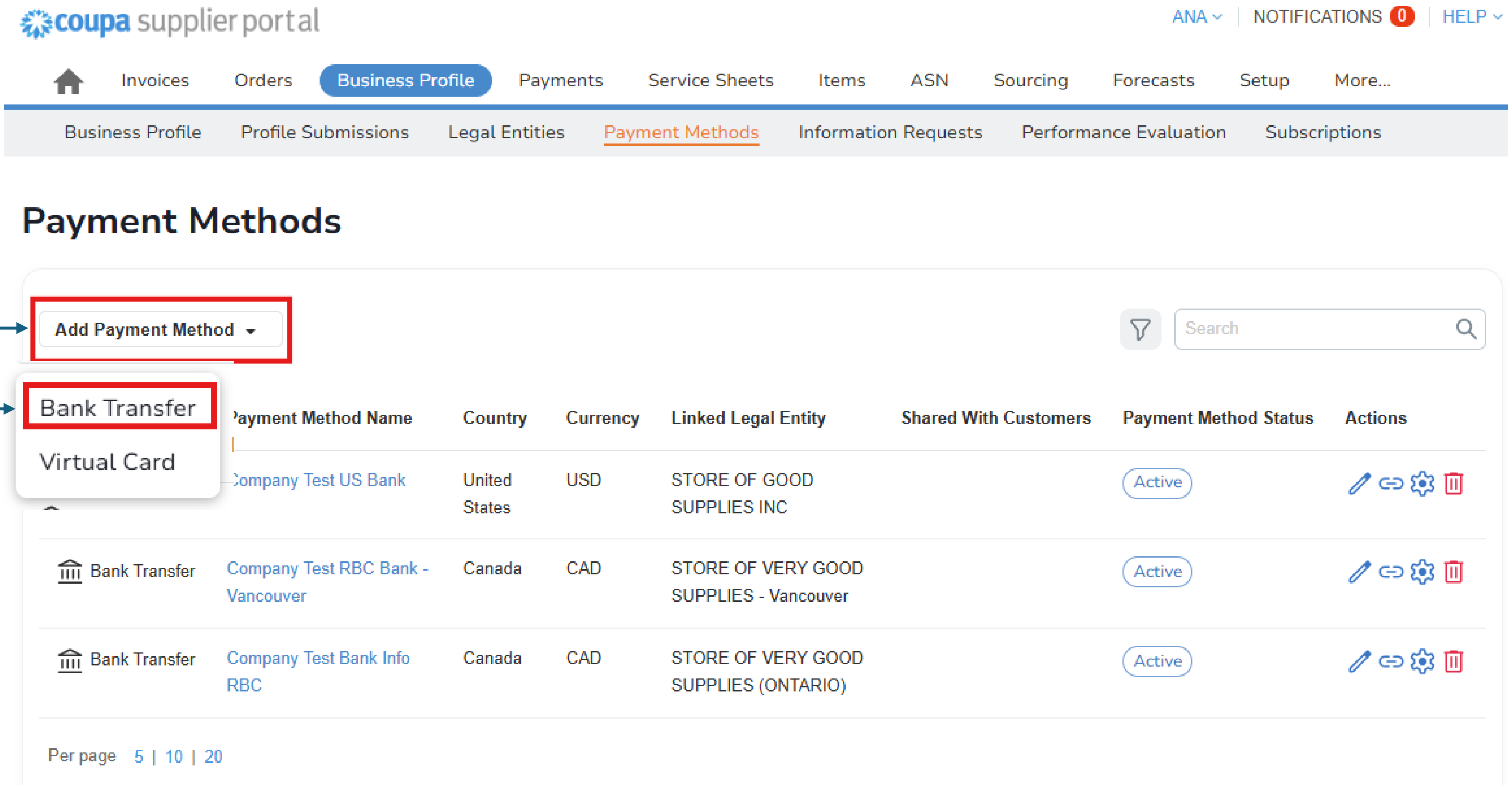


Your Payment method will be now unshared.

Create a New Payment Method on the CSP.

1. Click on *Add Payment Method*.

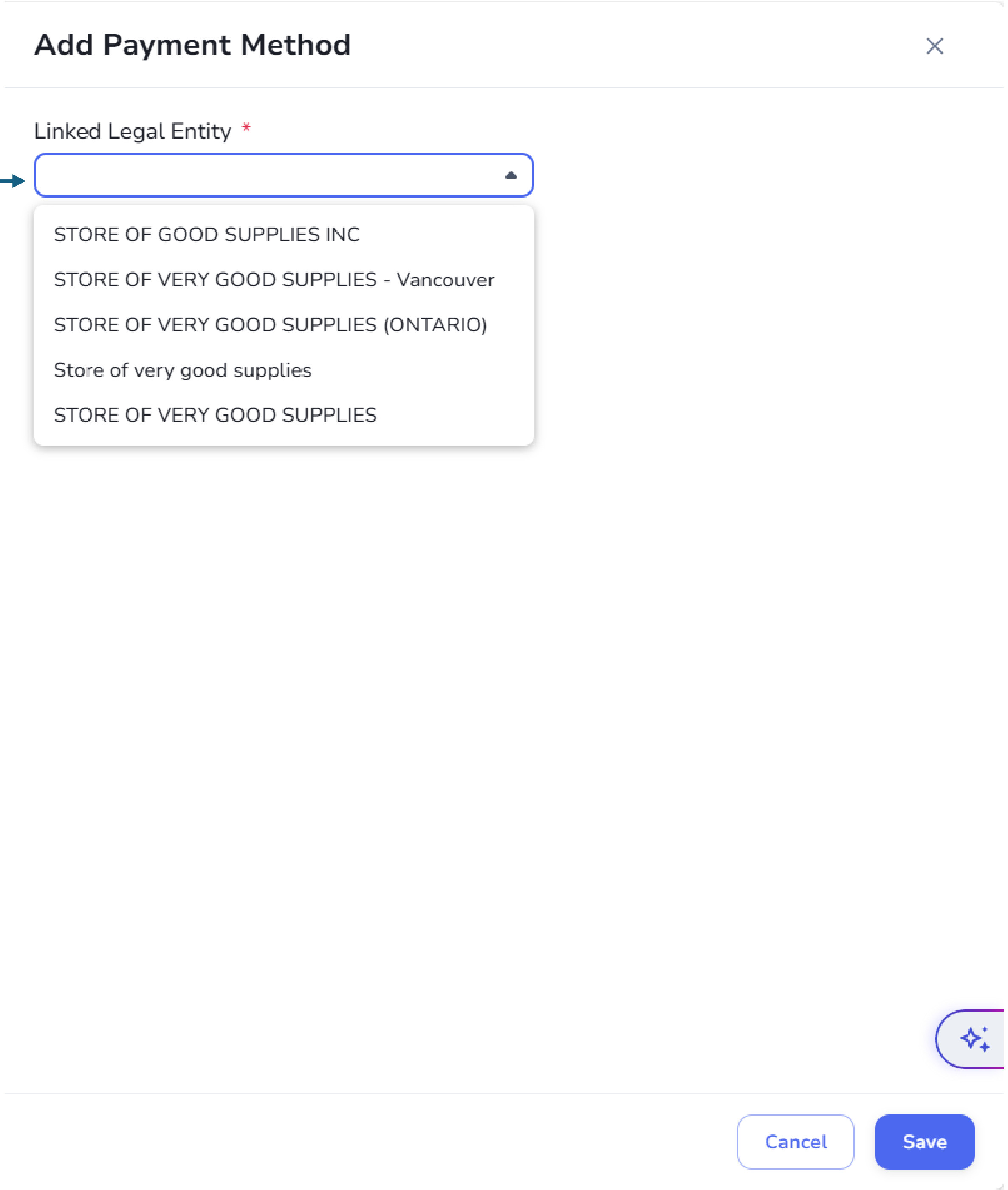
2. Click on *Bank Transfer*.



It will display the next window where you will be able to select your Legal Entity.

3. Select the *Legal Entity* related to that bank account

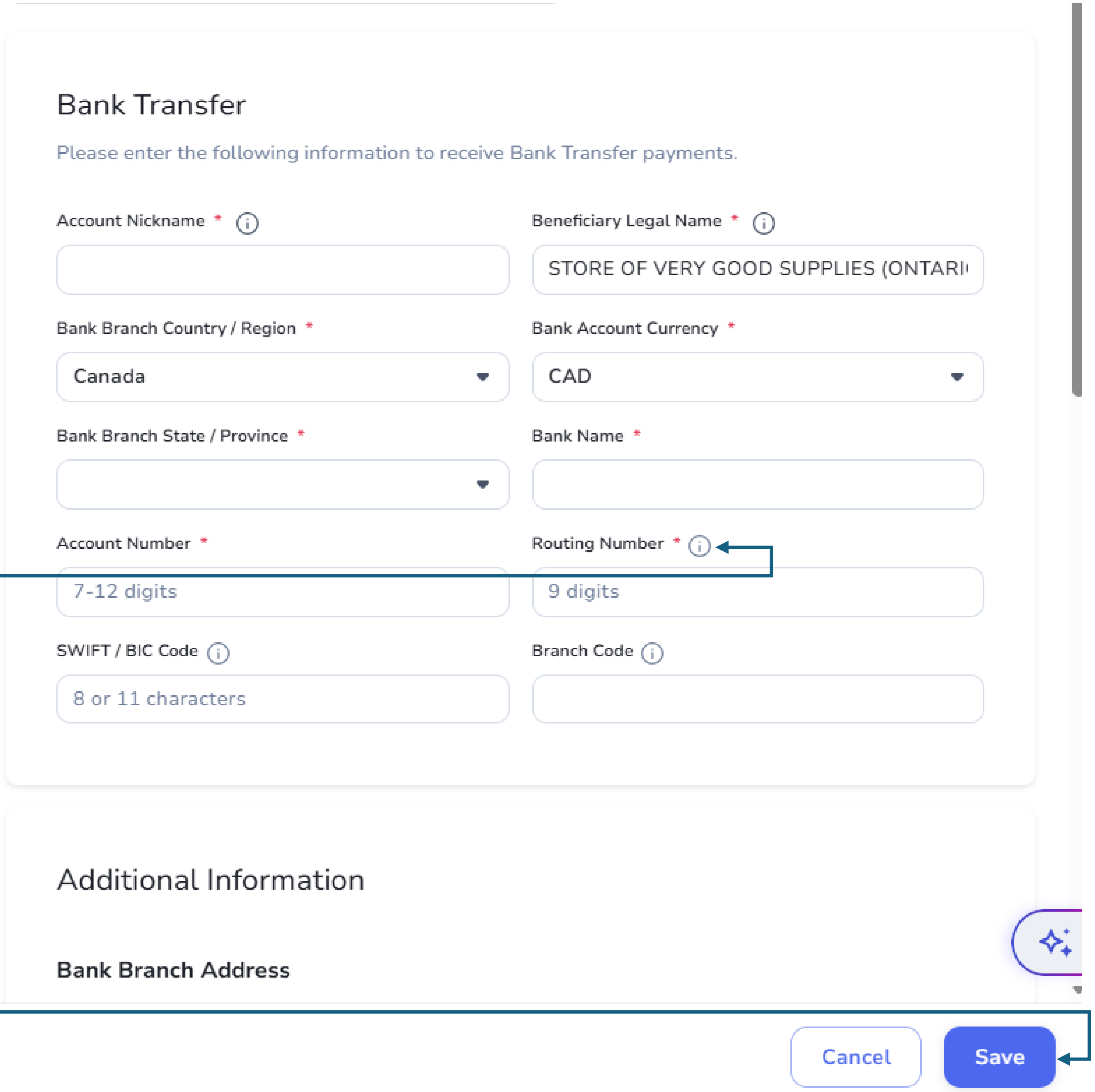
Additional fields will open to share the bank details.



4. Fill out all the mandatory fields marked with a (*) red asterisk, with your bank account information.

Note that your 9-digit Routing Number must be a 0, then 3-digit institution number, then 5-digit branch number

5. Click *Save*



Thank you for sharing your payment method in the CSP!

If you need any additional support, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

[Supplier Enablement Support]

Coupa Supplier Portal (CSP)

Update your Supplier Payment Account in the CSP.

Editing Your Payment Methods

To make changes to your payment methods, please follow these steps:

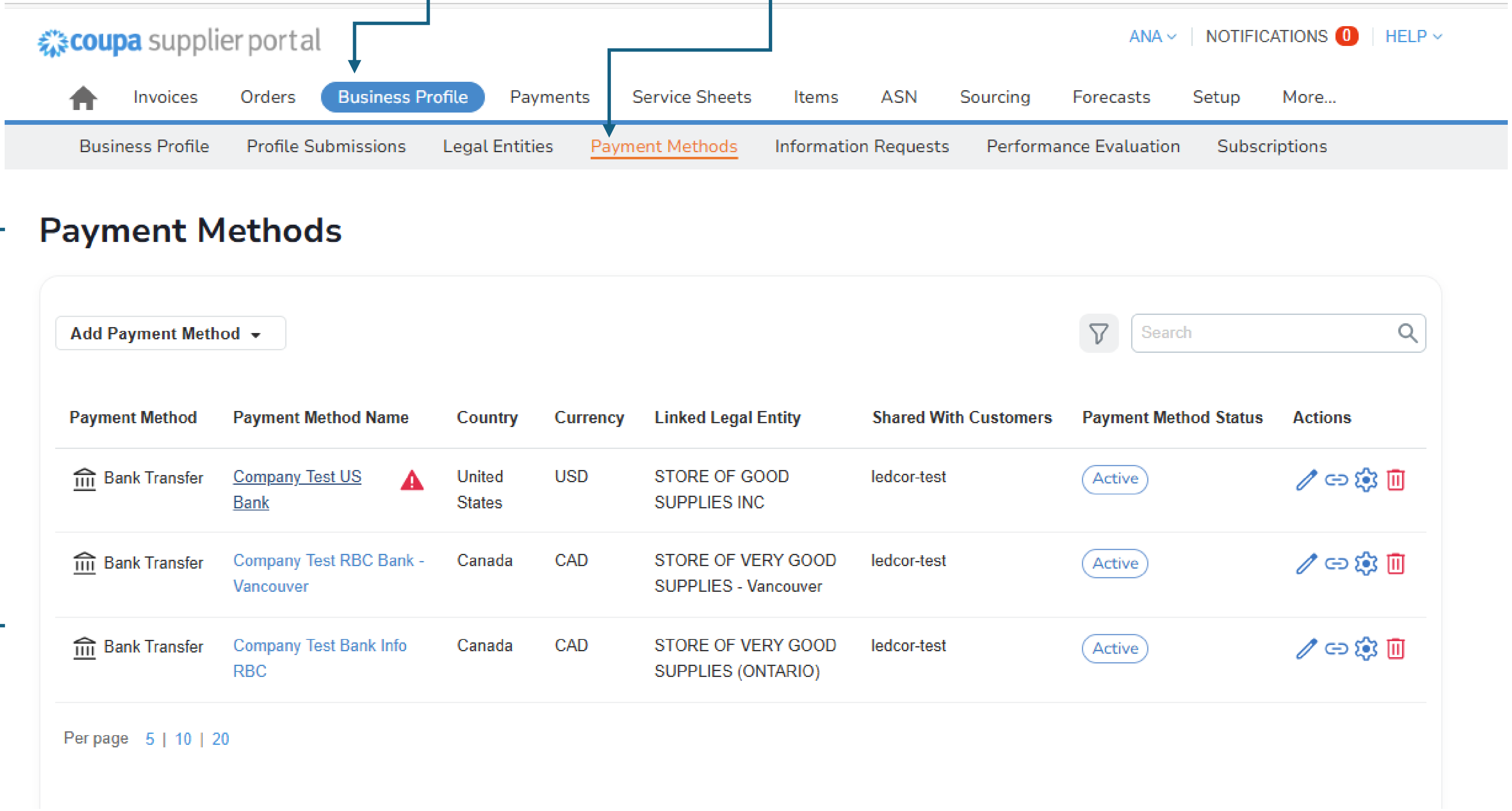
1. Unshare the payment method.
2. Click **Edit** to update the details.
3. Reshare the payment method with Ledcor.

Follow the guided instructions on the next slides to complete the process.

Locate your payment methods in the CSP.

1. Log in to Coupa Supplier Portal and from the Home page click on *Business Profile*

2.A second raw of tabs will open, click on *Payment Methods*



3. The list of your payment methods will open.

1. Unshare a Payment Method in the CSP.

1. Locate the payment method you wish to unshare and click on *Manage Linked Customers* button

Payment Methods

Add Payment Method

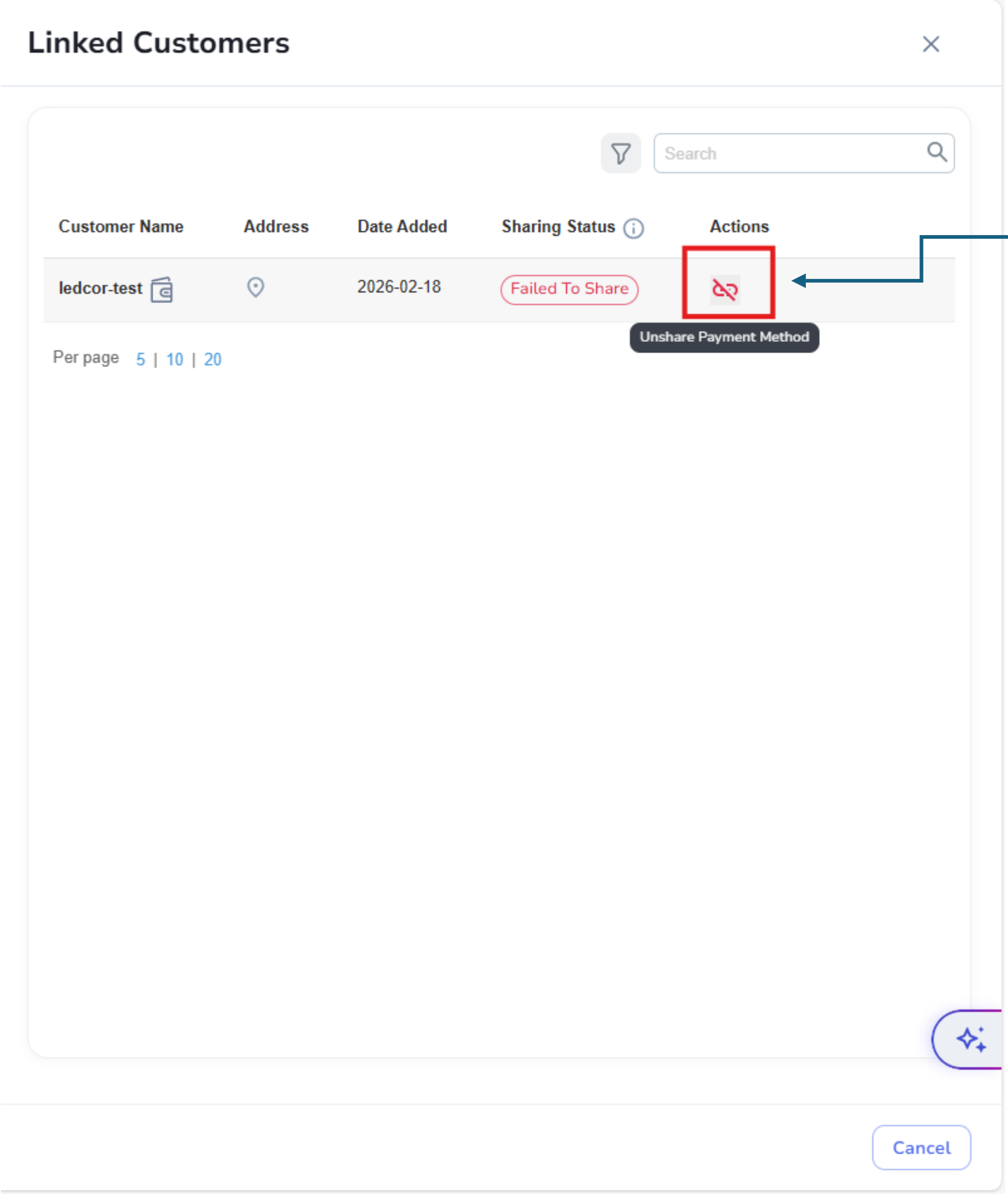
Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Company Test US Bank	United States	USD	STORE OF GOOD SUPPLIES INC	ledcor-test	Active	
Bank Transfer	Company Test RBC Bank - Vancouver	Canada	CAD	STORE OF VERY GOOD SUPPLIES - Vancouver		Active	
Bank Transfer	Company Test Bank Info RBC	Canada	CAD	STORE OF VERY GOOD SUPPLIES (ONTARIO)		Active	

Manage Linked Customers

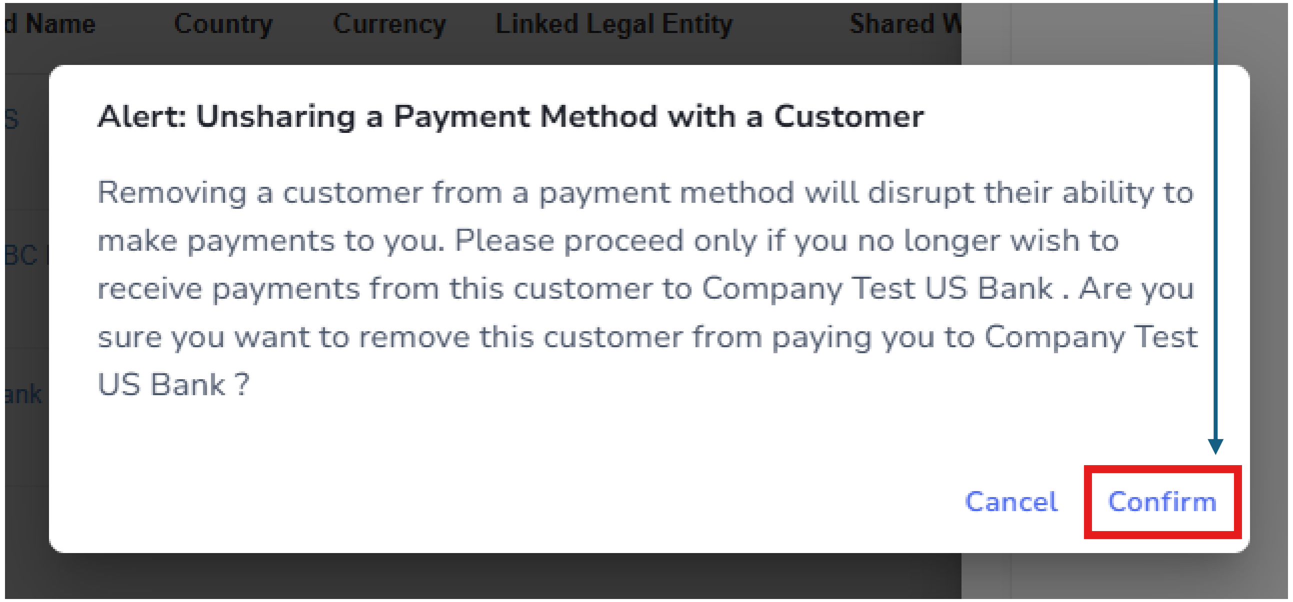
Per page 5 | 10 | 20

The next window will open with the list of your Linked Customers:



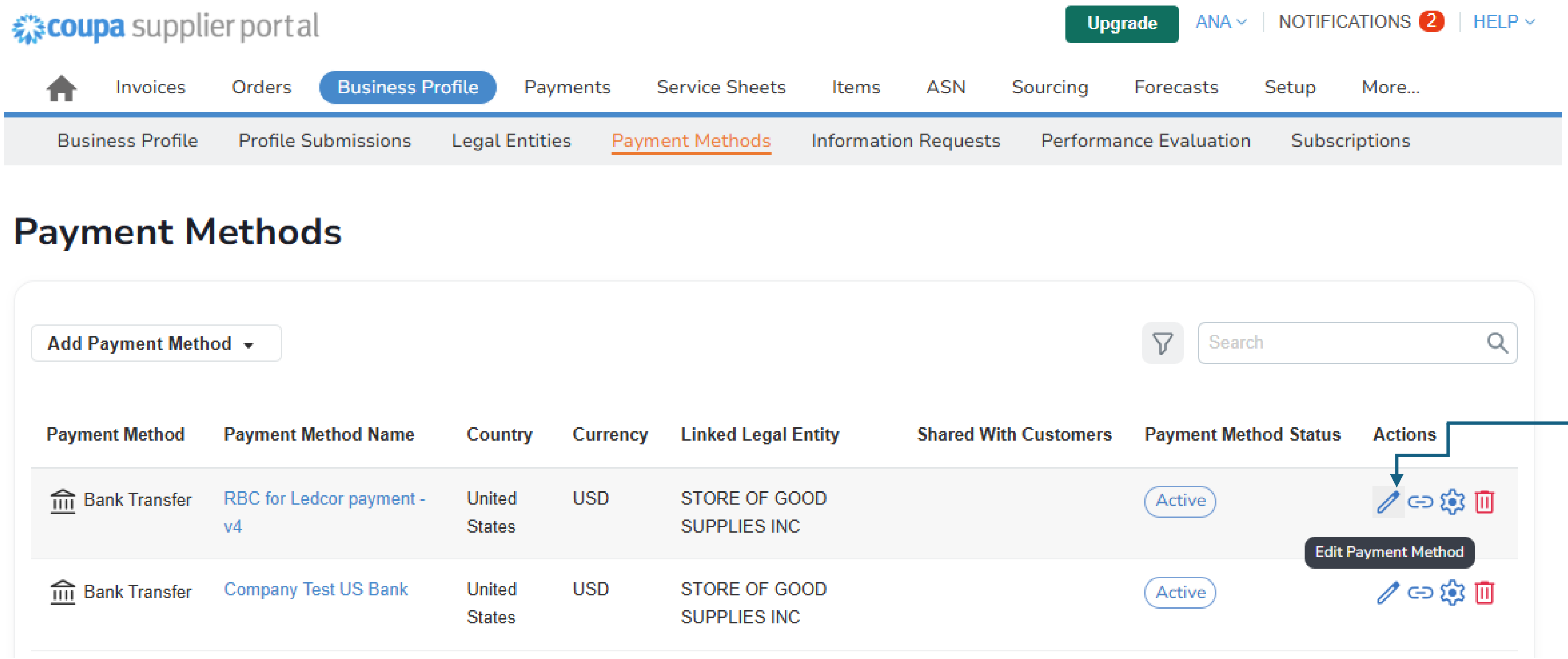
2. Click *Unshare Payment Method* on the Actions column for the Customer Ledcor.

3. Click *Confirm*



Your Payment method will be now unshared.

2. Edit your Payment Method in the CSP.



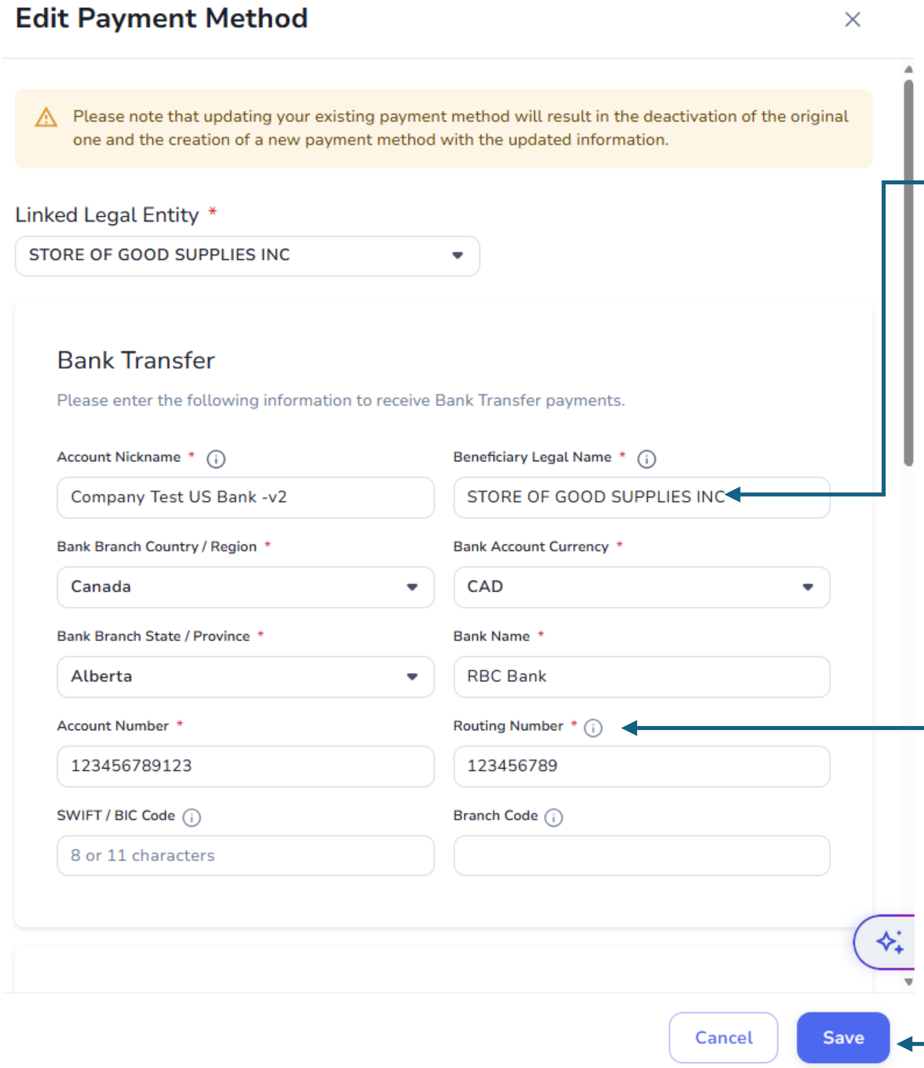
Click the *Edit Payment Method* button

It will open

2. Edit your Payment Method in the CSP.

It will open a window displaying your payment method details, **allowing you to update the legal name, routing number** or any other information identified by Ledcor.

Fill out all the mandatory fields marked with a (*) red asterisk, with your bank account information.

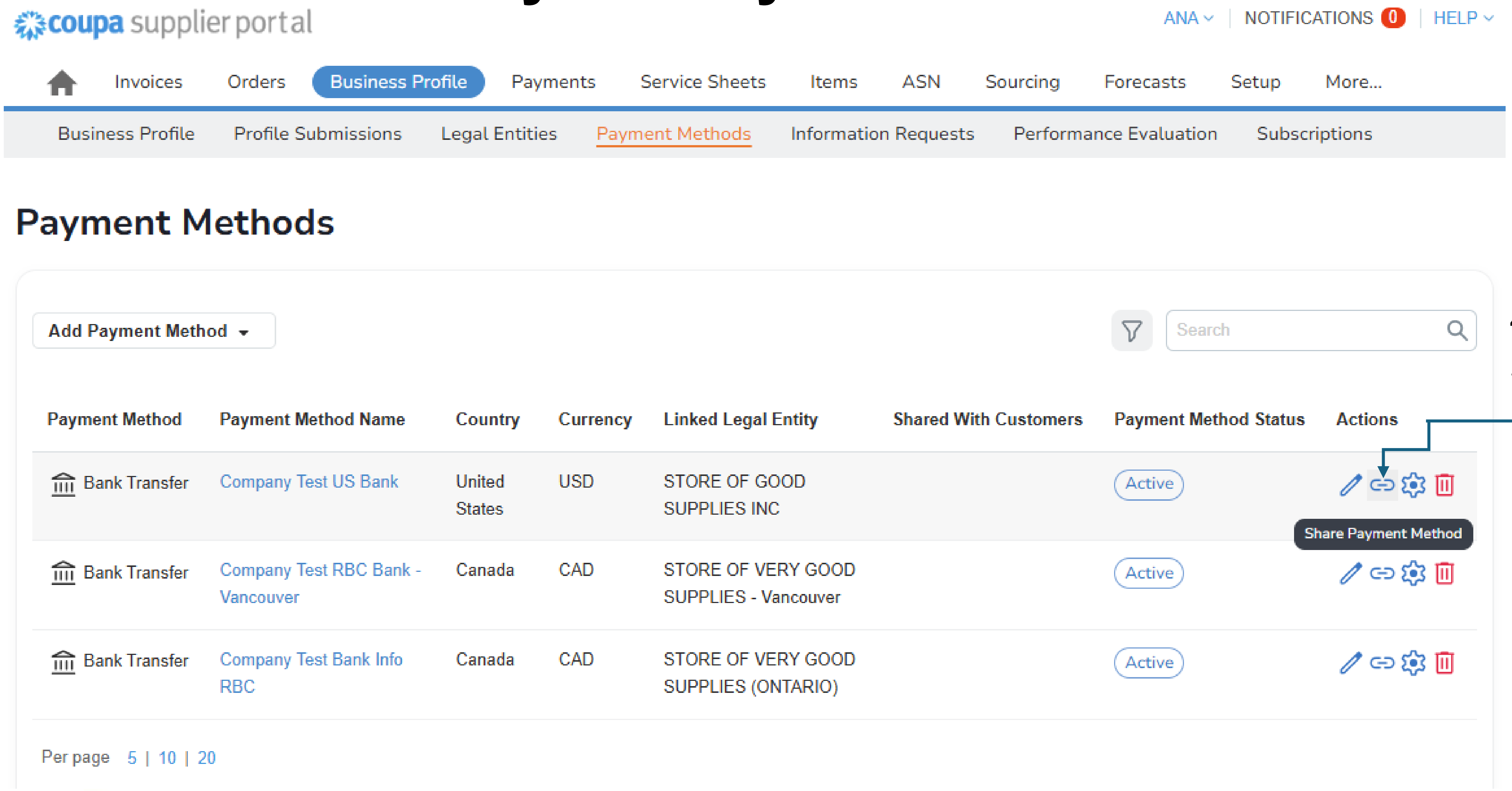


Add your company's Legal Name exactly as it is in the void check.

Canadian Companies Note that your 9-digit Routing Number must be a 0, then 3-digit institution number, then 5-digit branch number

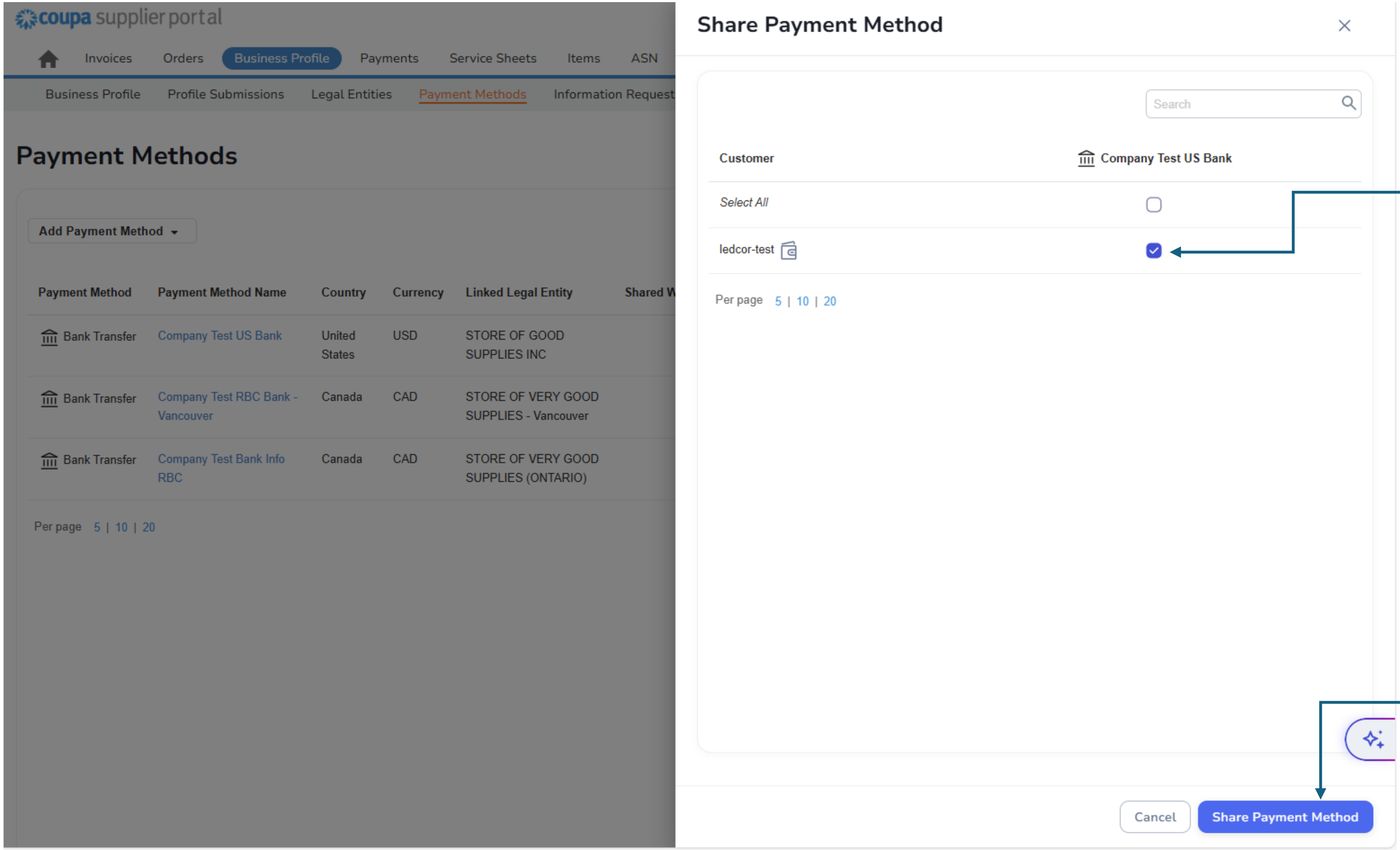
After completing your updates, click **Save.**

3. Reshare your Payment Method with Ledcor.



4. Click the *Share Payment Method* button

The next window will open with the list of your customers linked in Coupa.



6. Check the box to share your payment method with Ledcor.

7. Click *Share Payment Method*

The confirmation message will display, and you have shared your payment method with Ledcor. Please, let us know on the comments section of the supplier questionnaire that the changes have been completed.

Payment Methods

Sharing process for Company Test US Bank has started. We will notify you by email if there are any issues with the sharing.

Add Payment Method

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Company Test US Bank	United States	USD	STORE OF GOOD SUPPLIES INC	ledcor-test	Active	
Bank Transfer	Company Test RBC Bank - Vancouver	Canada	CAD	STORE OF VERY GOOD SUPPLIES - Vancouver		Active	
Bank Transfer	Company Test Bank Info RBC	Canada	CAD	STORE OF VERY GOOD SUPPLIES (ONTARIO)		Active	

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Thank you for updating your payment method in the CSP!

If you need any additional support, please contact the Ledcor Supplier Enablement Team at:

supplier.enablement@ledcor.com

You can also book a Microsoft Teams meeting with the Supplier Enablement team:

Supplier Enablement Support

Coupa Supplier Portal (CSP)

Reshare your Supplier Payment Account.

coupa supplier portal

LEDCOR GROUP

Editing Your Payment Methods

To make changes to your payment methods, please follow these steps:

1. Unshare the payment method.
2. Click **Withdraw** in Ledcor’s questionnaire.
3. Remove the current banking information in the questionnaire.
4. Create the payment account in the questionnaire to reshare.

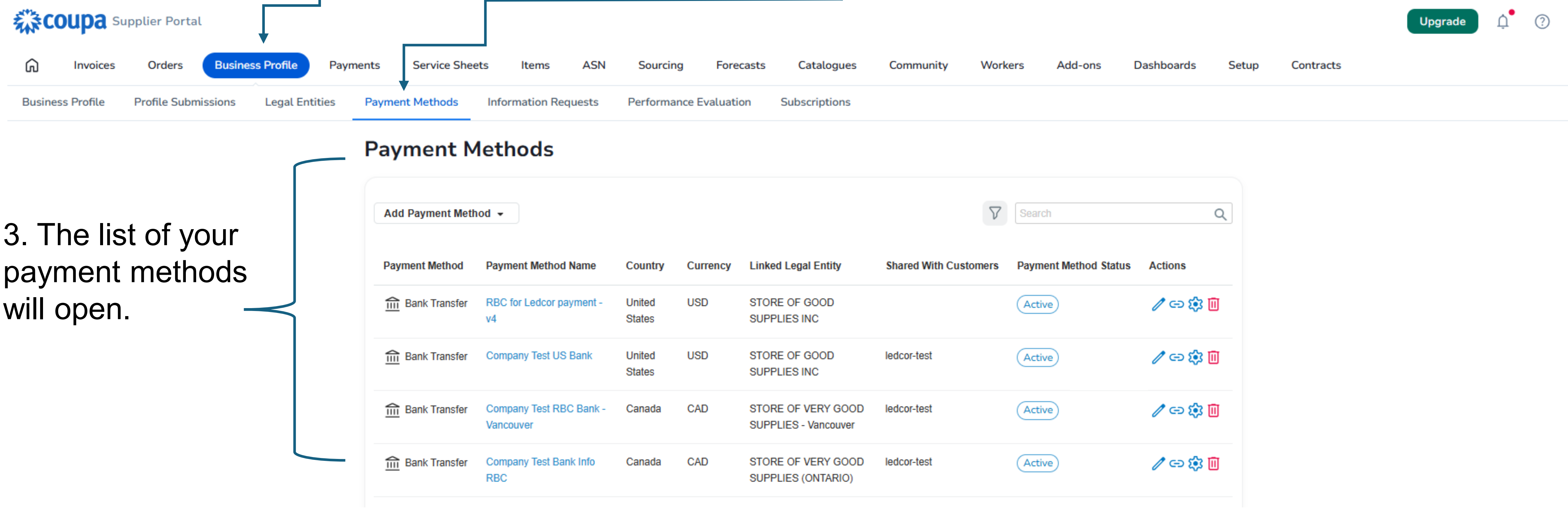
Follow the guided instructions on the next slides to complete the process.

Locate your payment methods in the CSP.

1. Log in to Coupa Supplier Portal and from the Home page click on *Business Profile*

2.A second raw of tabs will open, click on *Payment Methods*

3. The list of your payment methods will open.



1. Unshare a Payment Method in the CSP.

1. Locate the payment method you wish to unshare and click on *Manage Linked Customers* button

Payment Methods

Add Payment Method

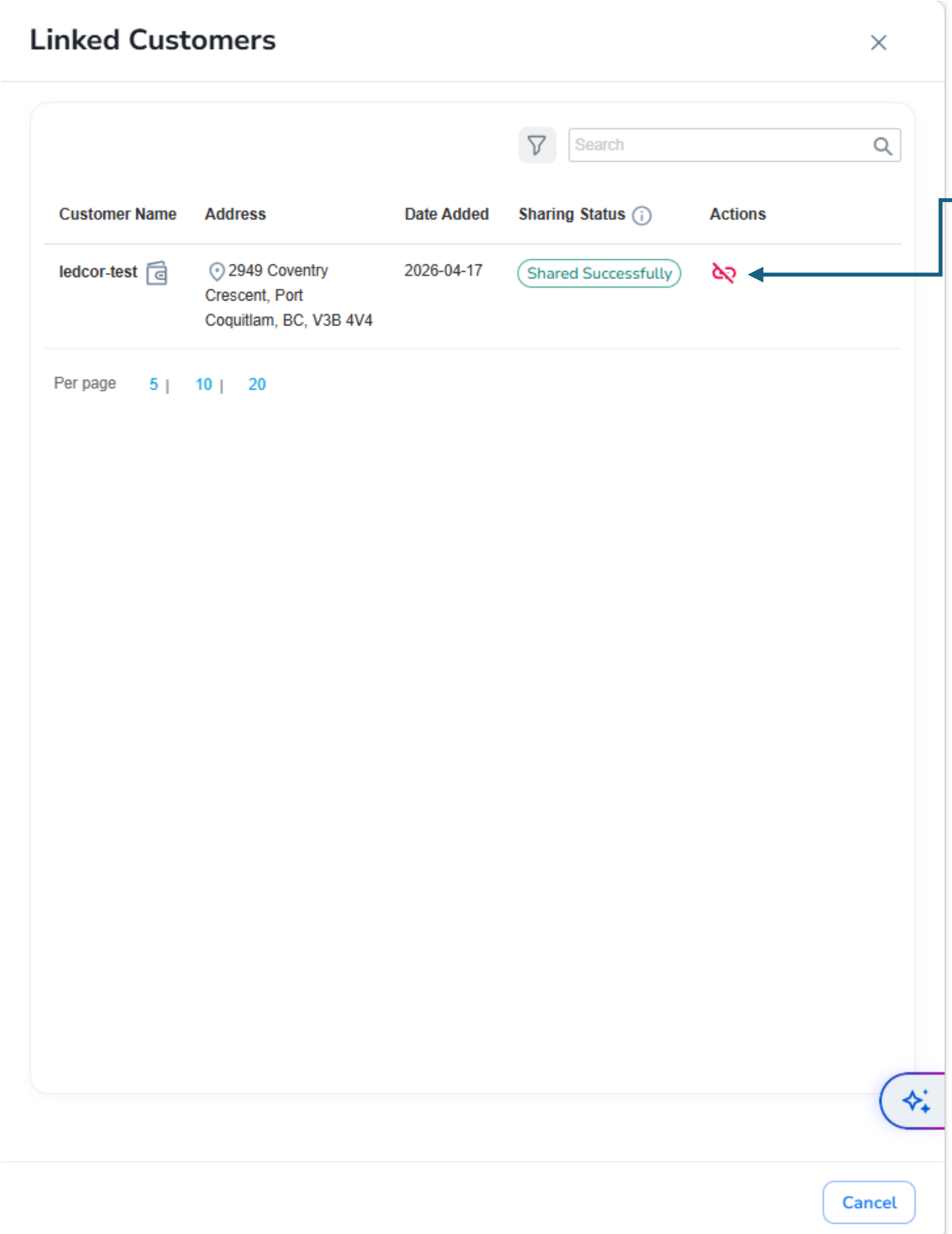
Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Company Test US Bank	United States	USD	STORE OF GOOD SUPPLIES INC	ledcor-test	Active	
Bank Transfer	Company Test RBC Bank - Vancouver	Canada	CAD	STORE OF VERY GOOD SUPPLIES - Vancouver		Active	
Bank Transfer	Company Test Bank Info RBC	Canada	CAD	STORE OF VERY GOOD SUPPLIES (ONTARIO)		Active	

Manage Linked Customers

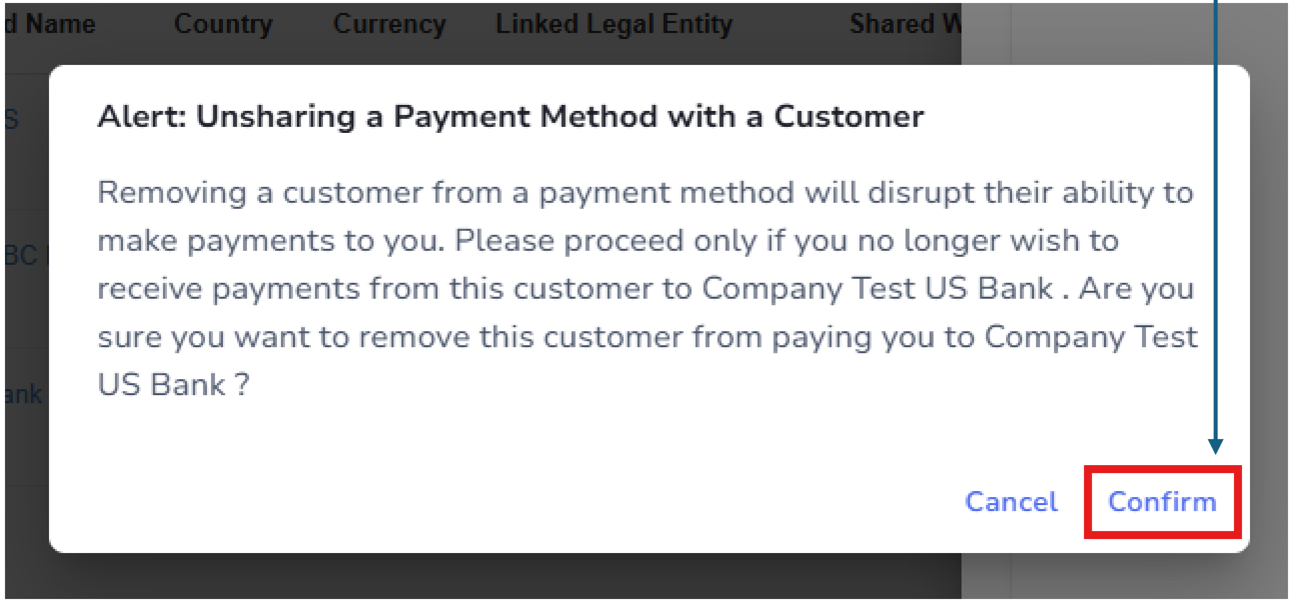
Per page 5 | 10 | 20

The next window will open with the list of your Linked Customers:



2. Click *Unshare Payment Method* on the Actions column for the Customer Ledcor.

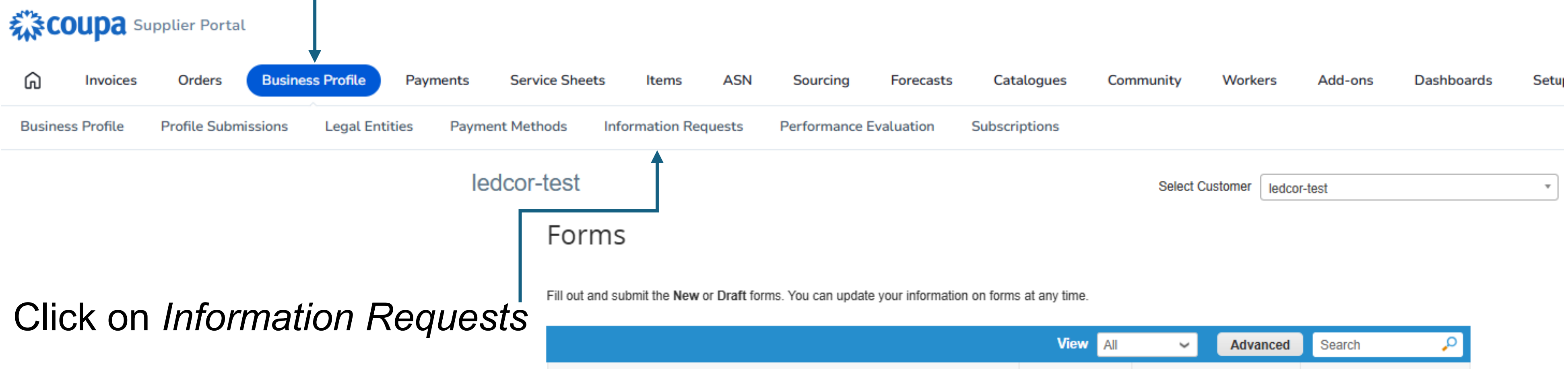
3. Click *Confirm*



Your Payment method will be now unshared.

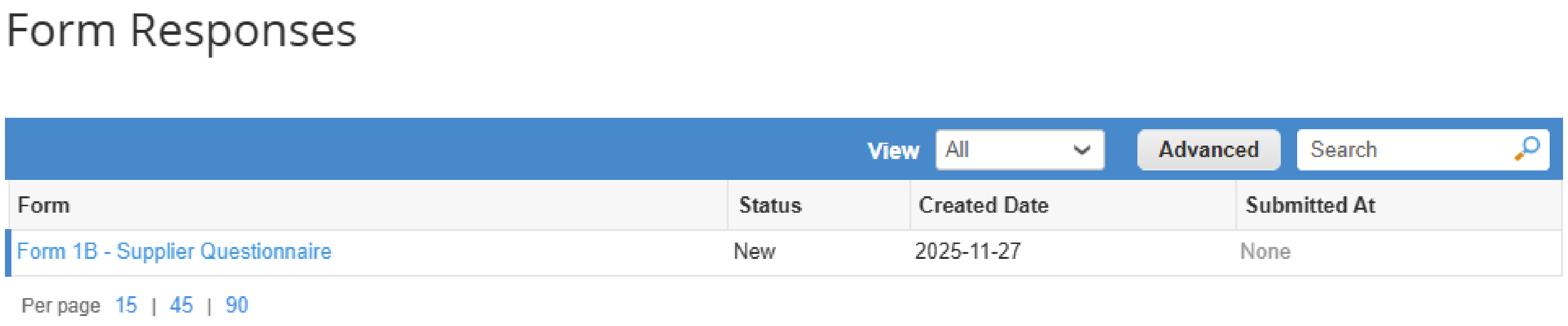
2. Click Withdraw in Ledcor's questionnaire.

1. Click on *Business Profile*



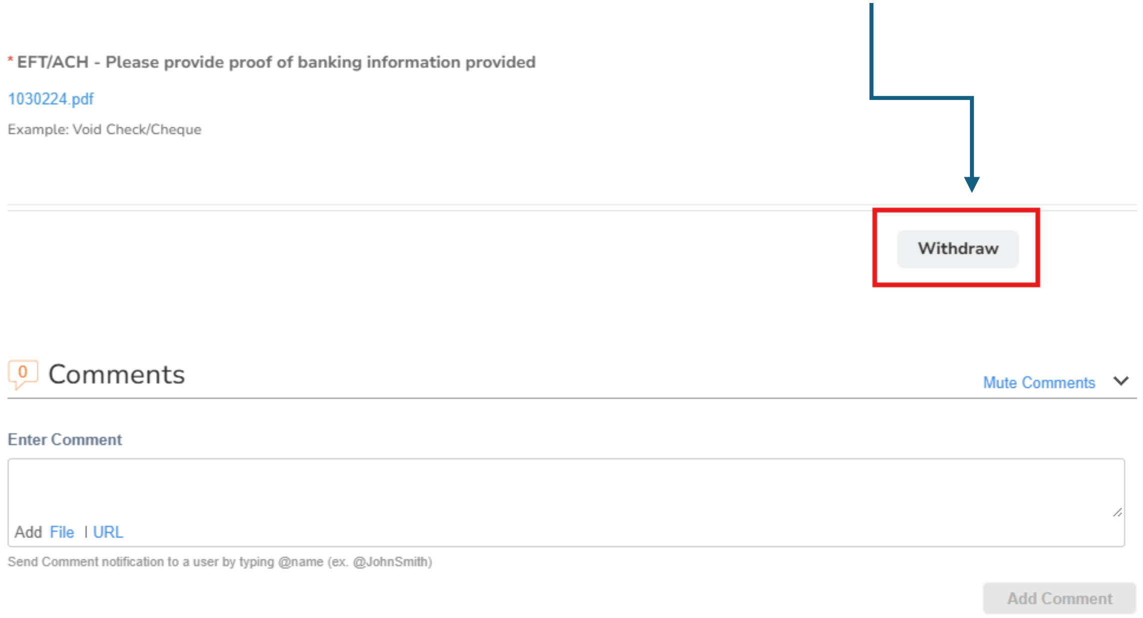
2. Click on *Information Requests*

3. The next screen is Form Responses:
Click *Form 1B – Supplier Questionnaire*



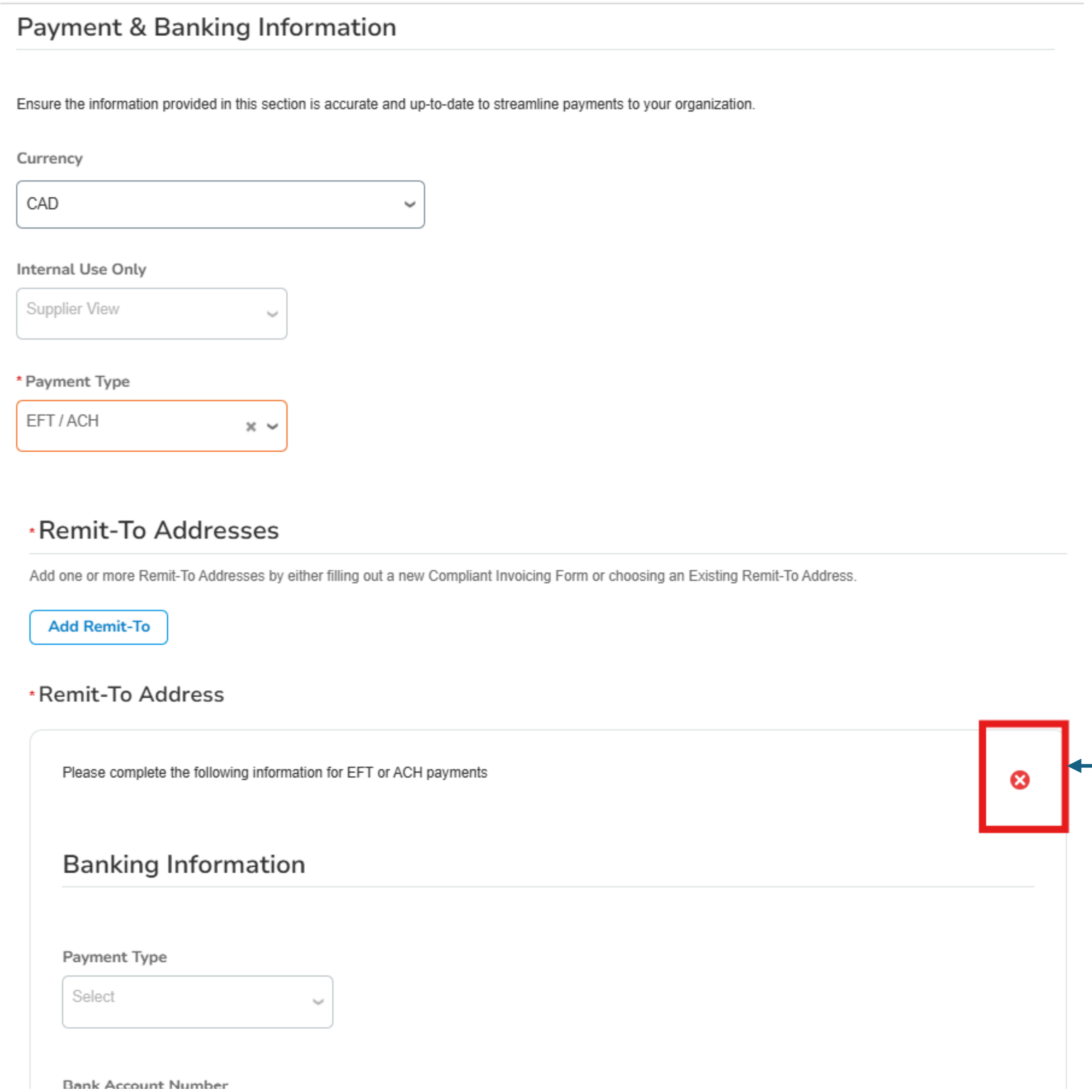
2. Click Withdraw in Ledcor's questionnaire.

4. Click *Withdraw*



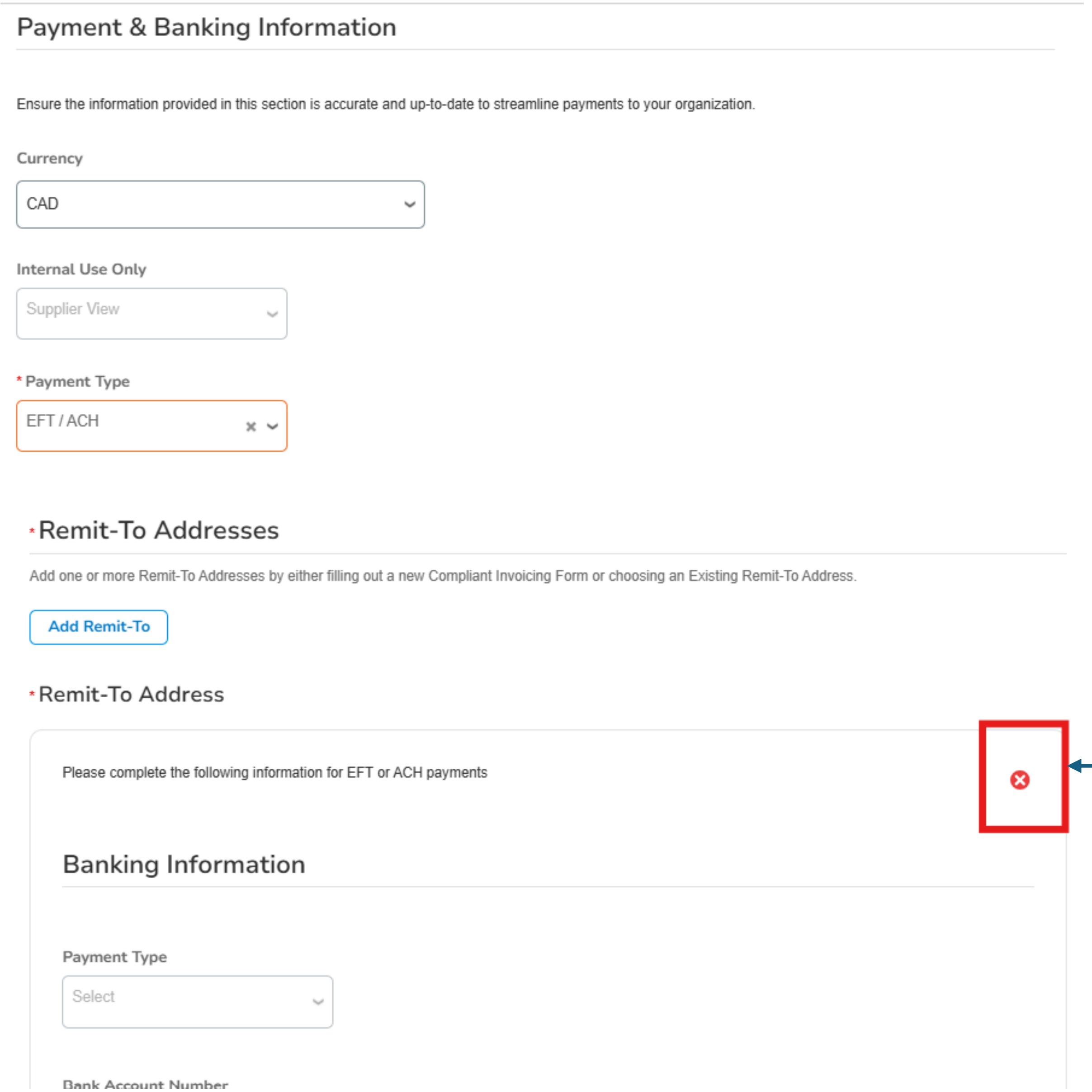
It will open the questionnaire for edits and will not remove your previous responses.

3. Remove the current banking information.



Scroll down to the Payment & Banking section to click the *Red* ***X*** button

3. Remove the current banking information.



Scroll down to the Payment & Banking section to click the *Red* ***X*** button

4. Create the payment account in the questionnaire to reshare.

* 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

Click **Add Remit-To**, to display the addresses you have on your account from the previous registration process. Keep only 1 active Remit To address in Coupa.

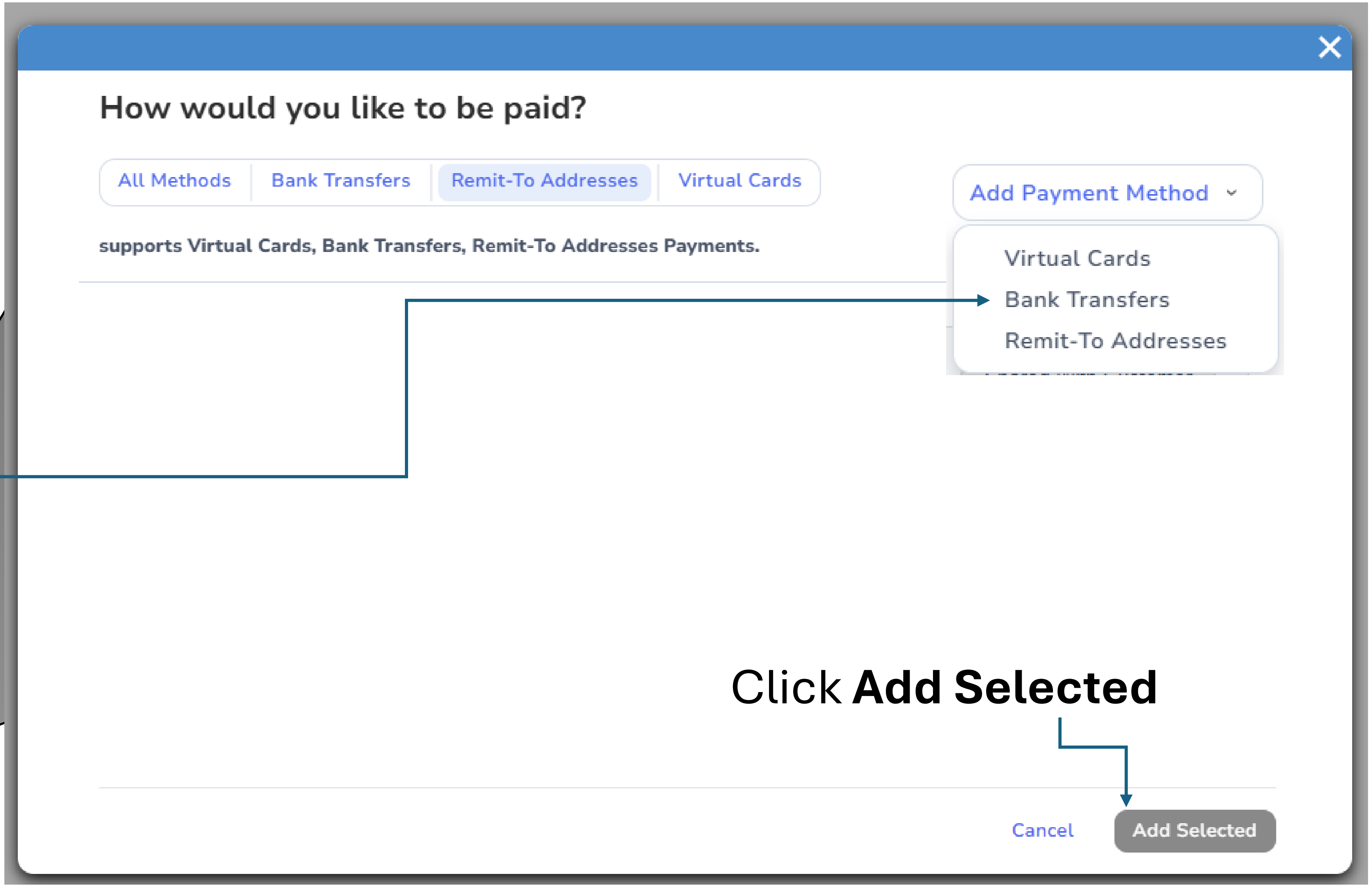
* EFT/ACH - Please provide proof of banking information provided

Choose File No file chosen

Example: Void Check/Cheque

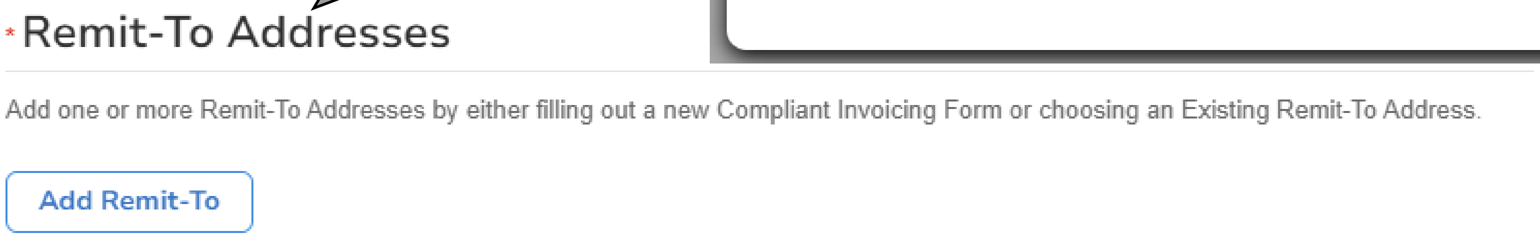
You are required to upload a Void Check, Bank letter, or official document that verifies the payment details. Click **Choose File**.

The next window will open:

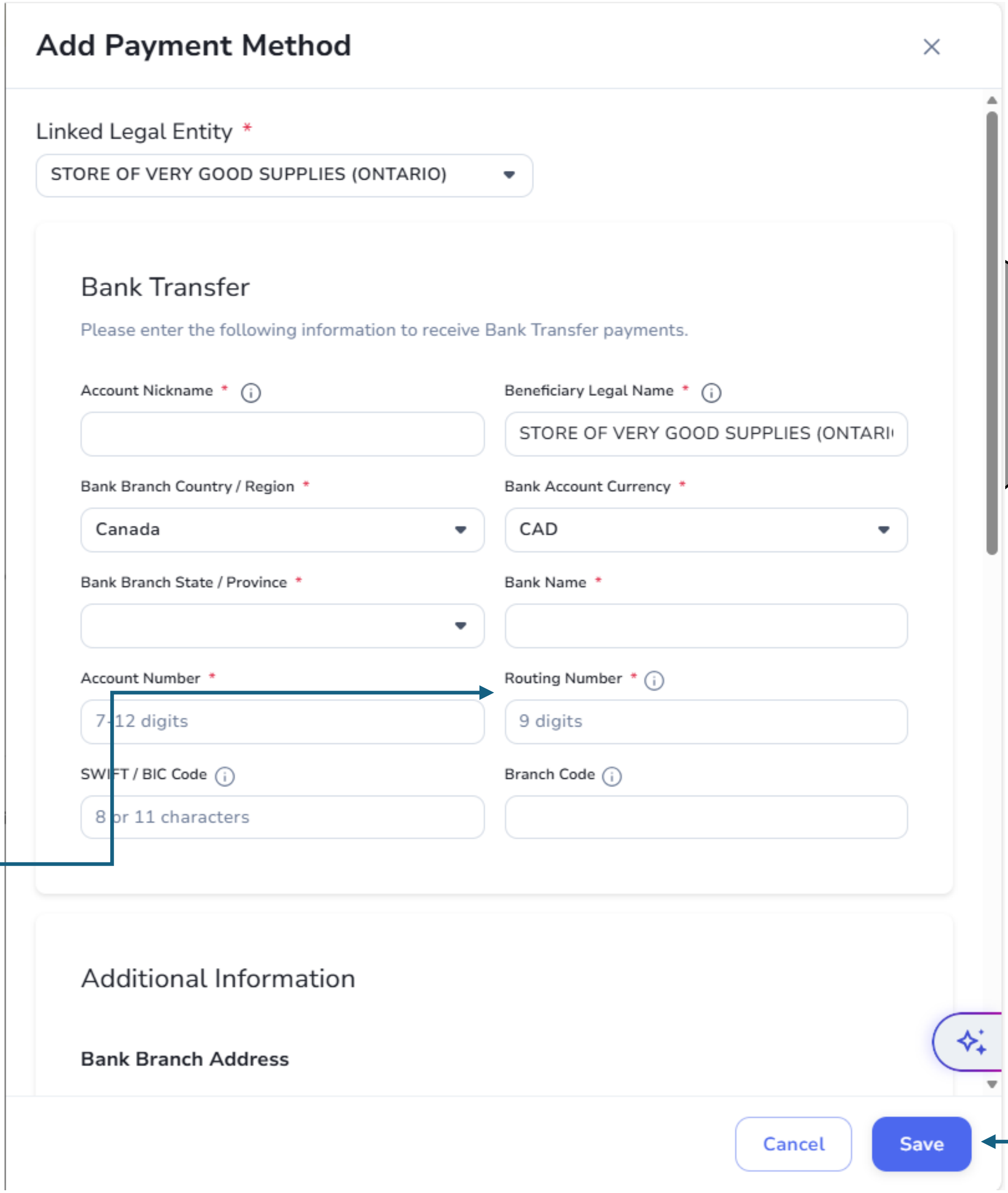


Click on *Add Payment Method*:
Click *Bank Transfers,* to be paid on EFT/ACH.

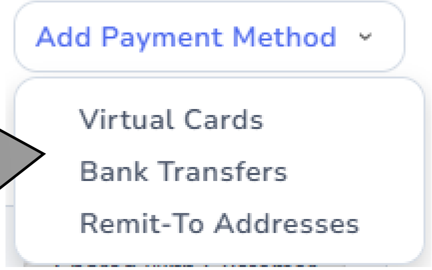
Click **Add Selected**



The next window will open:



Your 9-digit **Routing Number** must be a 0, then 3-digit institution number, then 5-digit branch number

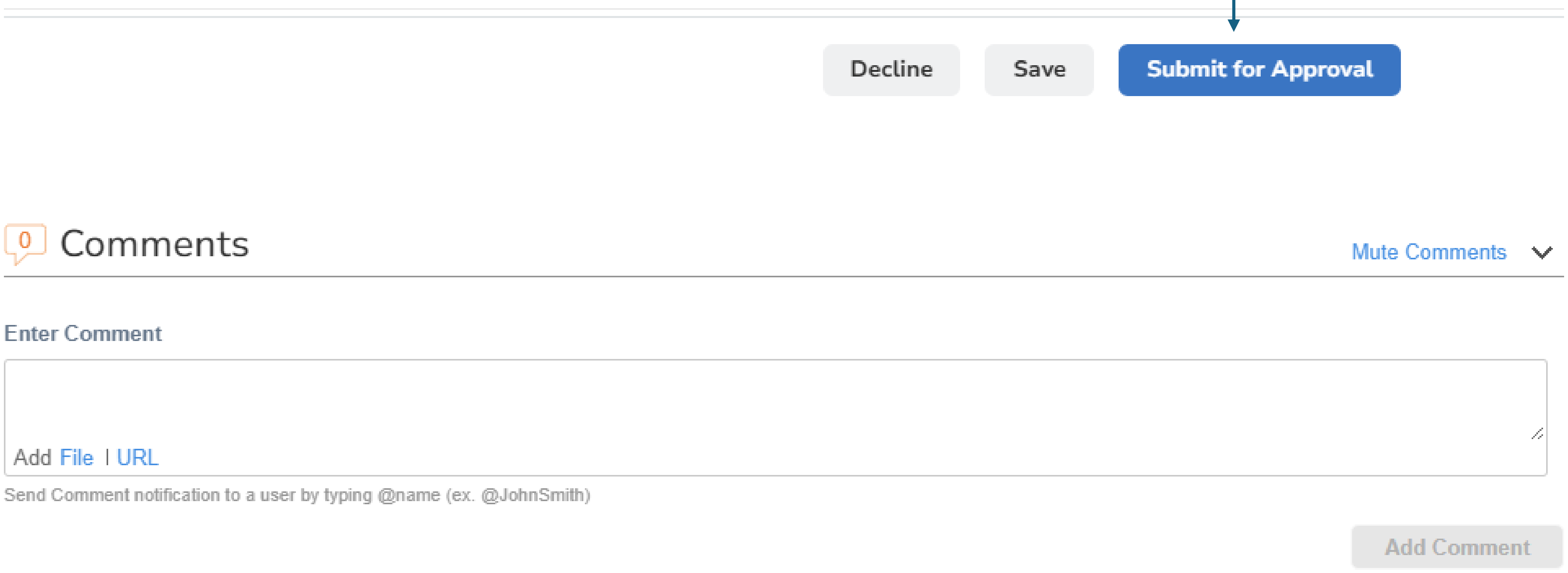


Click on *Add Payment Method*:
Click *Bank Transfers,* to be paid on EFT/ACH.

Click *Save*

Fill out additional comments or include files on the **Comments** section at the end of the form.

Once you completed all the sections, Click **Submit for Approval**.



Thank you!

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[Supplier Enablement Support]()

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