

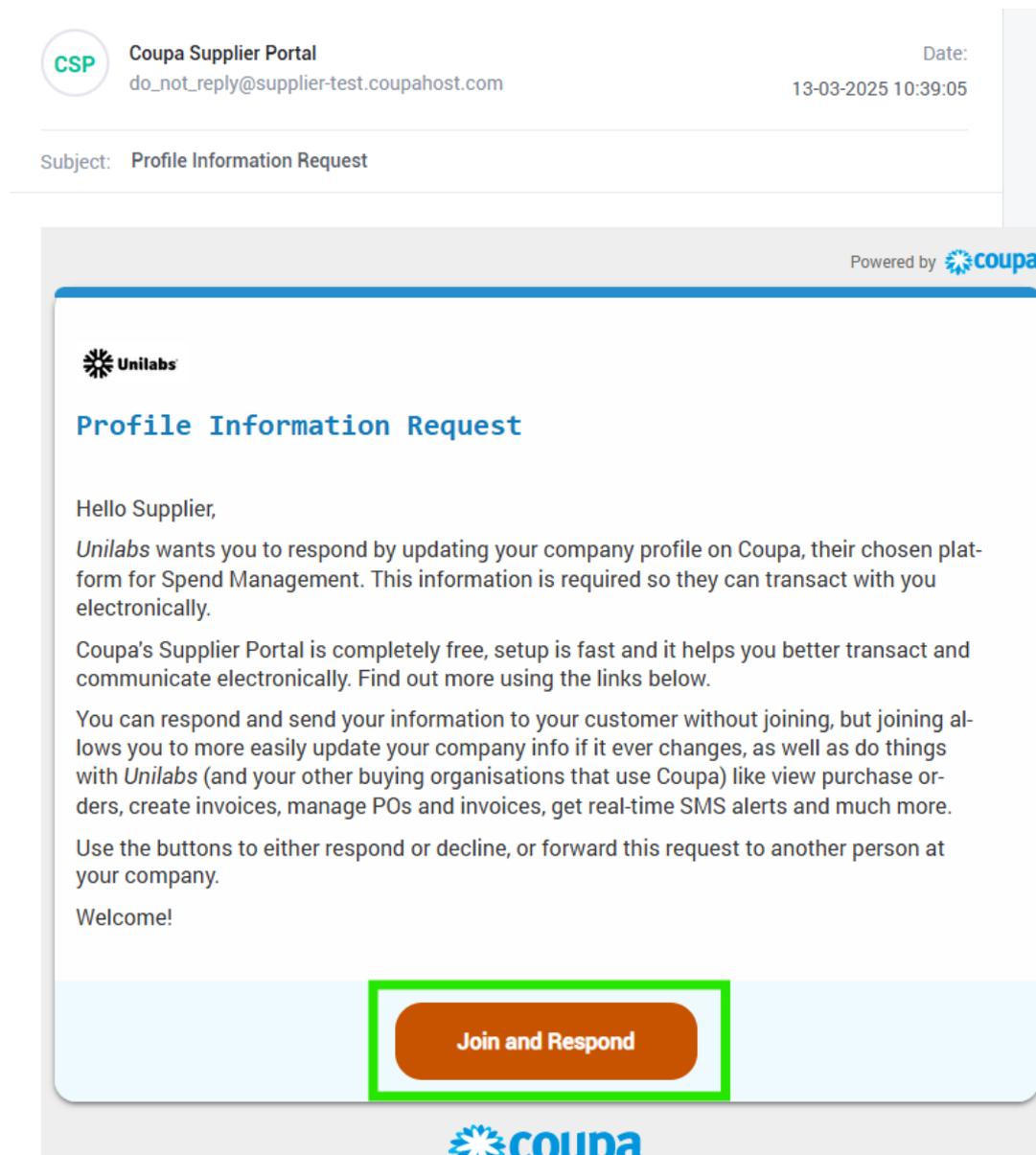
Supplier Onboarding Guide

Account Creation: First, a Unilabs user will create your account in the system.

Approval and Notification: Once your account is approved, you will receive an email notification from Coupa with a link to complete your onboarding.

Complete Your Information: Click on the link in the email to access the **Coupa Supplier Portal**. You will be prompted to fill in your company details and other necessary information to finalize your profile.

Figure 1



The screenshot shows an email from the Coupa Supplier Portal. The email header includes the sender's name 'Coupa Supplier Portal', email address 'do_not_reply@supplier-test.coupahost.com', and the date '13-03-2025 10:39:05'. The subject is 'Profile Information Request'. The email body features the Unilabs logo, the title 'Profile Information Request', and a message from Unilabs asking the supplier to update their profile on Coupa. It explains that Coupa's Supplier Portal is free and helps with transacting electronically. The message also mentions that joining allows for easier updates and access to various features like purchase orders and invoices. At the bottom, there is a prominent orange button labeled 'Join and Respond' which is highlighted with a green border. The Coupa logo is visible at the bottom of the email content area.

Figure 2

Create an Account

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

*** Business Name**

Your legal business name (or legal personal name if an individual)

*** Email**

*** First Name**

*** Last Name**

*** Password**

*** Confirm Password**

Use at least 8 characters and include a number and a letter.

*** Country/Region**

*** VAT ID** 

I do not have a Tax ID

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

[Create an Account](#)

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

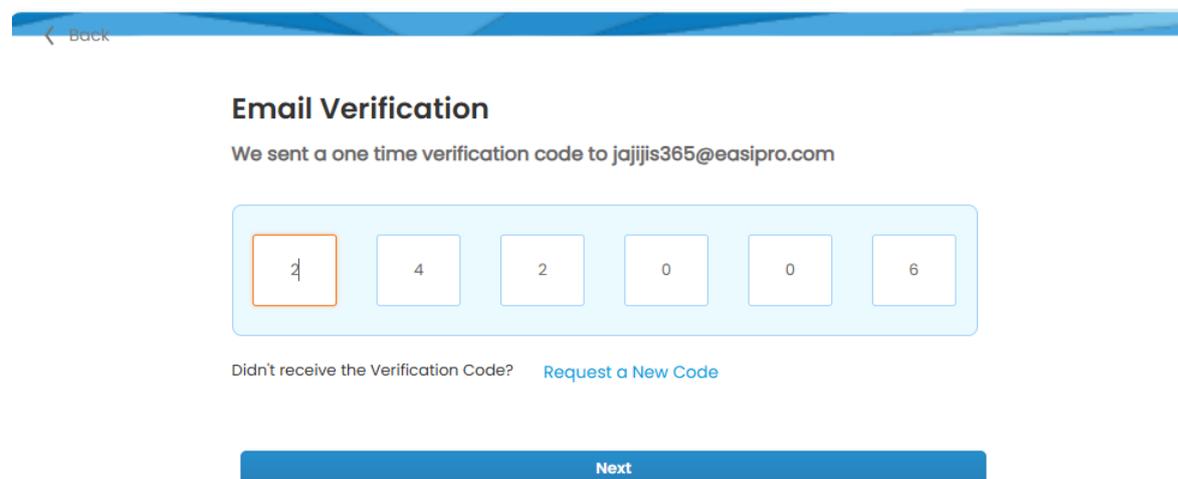
[Forward this to someone](#)

Verification Step: After filling in your basic information, you will receive another email containing a **verification code**. Enter this code in the portal to verify your details.

Figure 3

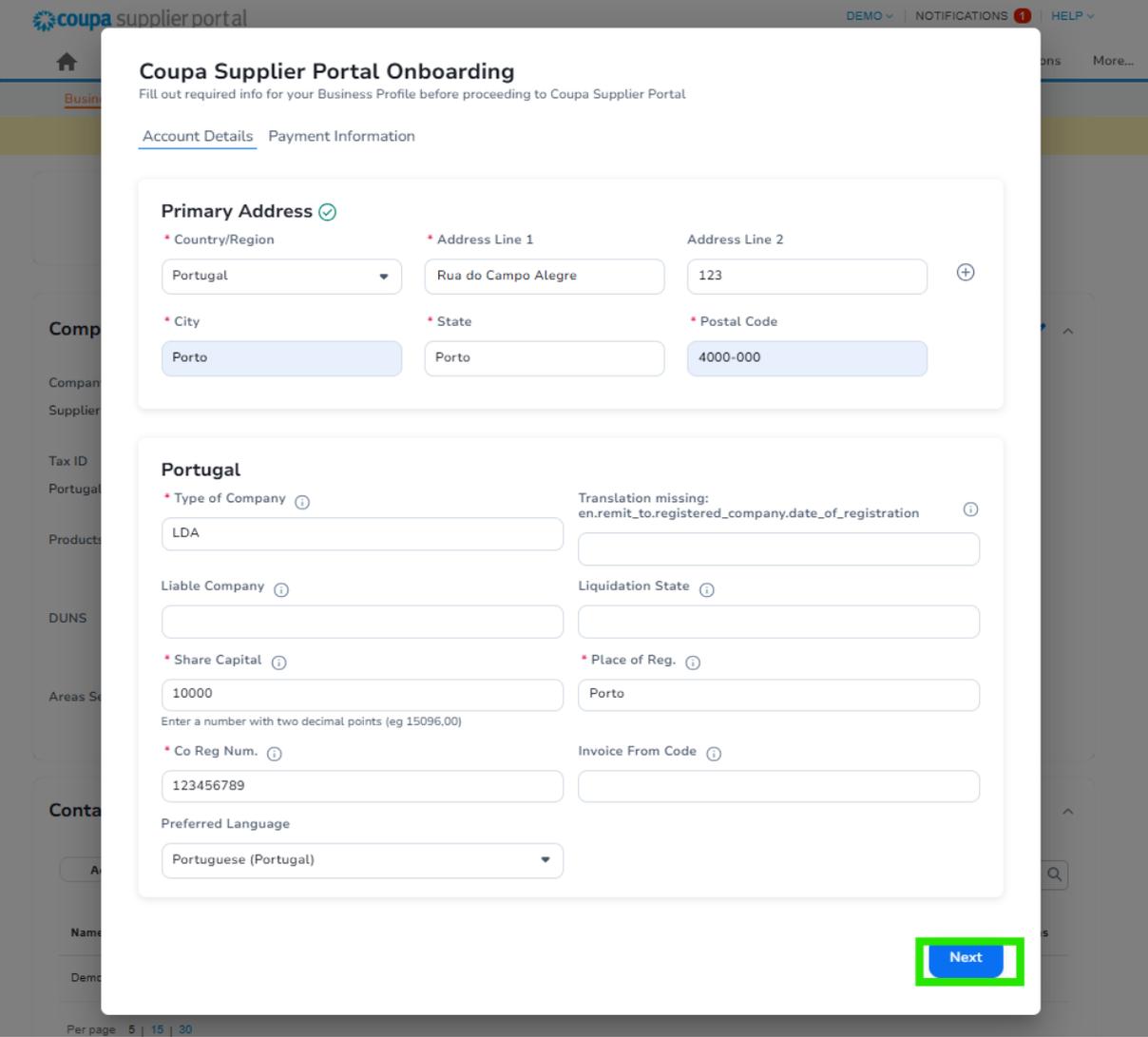


Figure 4



You are now inside Coupa and should fill your information as required by the system.

Figure 5



Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details | Payment Information

Primary Address ✓

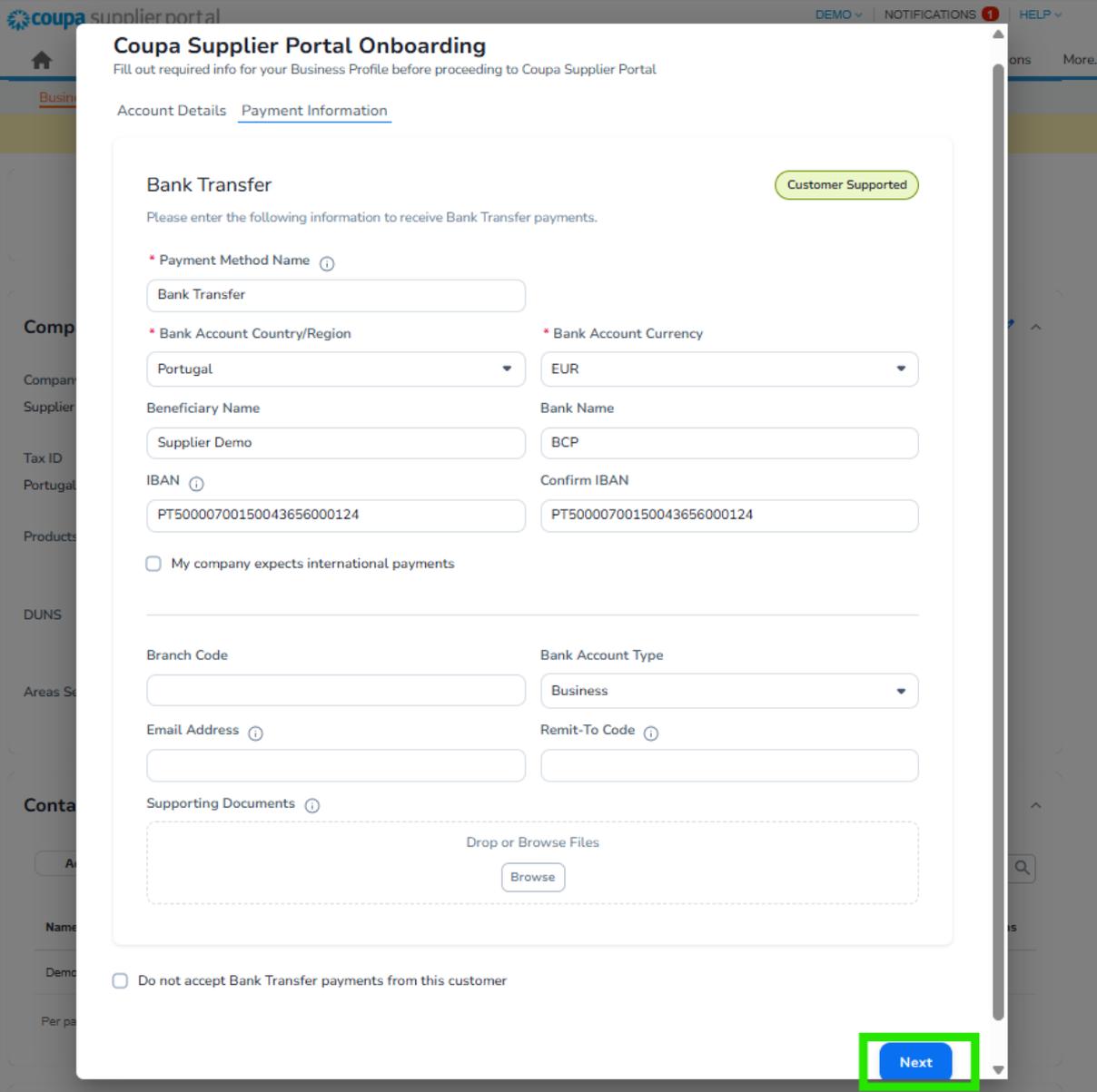
* Country/Region: Portugal
* Address Line 1: Rua do Campo Alegre
Address Line 2: 123
* City: Porto
* State: Porto
* Postal Code: 4000-000

Portugal

* Type of Company: LDA
Translation missing: en.remit_to.registered_company.date_of_registration
Liabile Company:
Liquidation State:
* Share Capital: 10000
Enter a number with two decimal points (eg 15096.00)
* Place of Reg.: Porto
* Co Reg Num.: 123456789
Invoice From Code:
Preferred Language: Portuguese (Portugal)

Next

Figure 6



Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Bank Transfer Customer Supported

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ
Bank Transfer

* Bank Account Country/Region Portugal * Bank Account Currency EUR

Beneficiary Name Supplier Demo Bank Name BCP

IBAN ⓘ PT50000700150043656000124 Confirm IBAN PT50000700150043656000124

My company expects international payments

Branch Code Bank Account Type Business

Email Address ⓘ Remit-To Code ⓘ

Supporting Documents ⓘ
Drop or Browse Files
Browse

Do not accept Bank Transfer payments from this customer

Next

Once you go through the first screen, you should then go to Business Profile -> Information Request to answer to our form and submit your information to our server.

Figure 7

coupa supplier portal DEMO | NOTIFICATIONS 1 | HELP

[Invoices](#)
[Orders](#)
[Business Profile](#)
[Setup](#)
[Service Sheets](#)
[ASN](#)
[Sourcing](#)
[Forecasts](#)
[Catalogs](#)
[Community](#)
[More...](#)

[Business Profile](#)
[Legal Entities](#)
[Information Requests](#)
[Performance Evaluation](#)

Unilabs Coupa Test Profile: Unilabs Coupa Test

Form Responses

Form	Status	Created Date	Submitted At
2. Supplier Data Entry_new	New	03/13/25	None

Per page: 15 | 45 | 90

Figure 8

Unilabs Coupa Test Profile: Unilabs Coupa Test

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

Choose the correct State or Region unless you need to keep the current value. ✕

[View All Responses](#)

2. Supplier Data Entry_new

Supplier Information 6

Supplier Demo

• Primary Contact

First Name

Last Name

Email address

Work Phone

Mobile Phone

Update Required Information: Ensure that you update your information according to the required fields listed in the portal. These fields include details such as company address, contact information, and tax identification.

Add Bank Account: To add your bank account details, click on the "**Add Remit To**" box in the portal. Enter the necessary bank account information to ensure smooth payment processing.

Figure 9

DUNS Number

i

* Commercial Registration

No file chosen

* 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.



Payment Method

Select ▼

* Preferred Currency

EUR ▼

The currency the supplier would like to use to do business

* Language

Select ▼

* Inco Terms

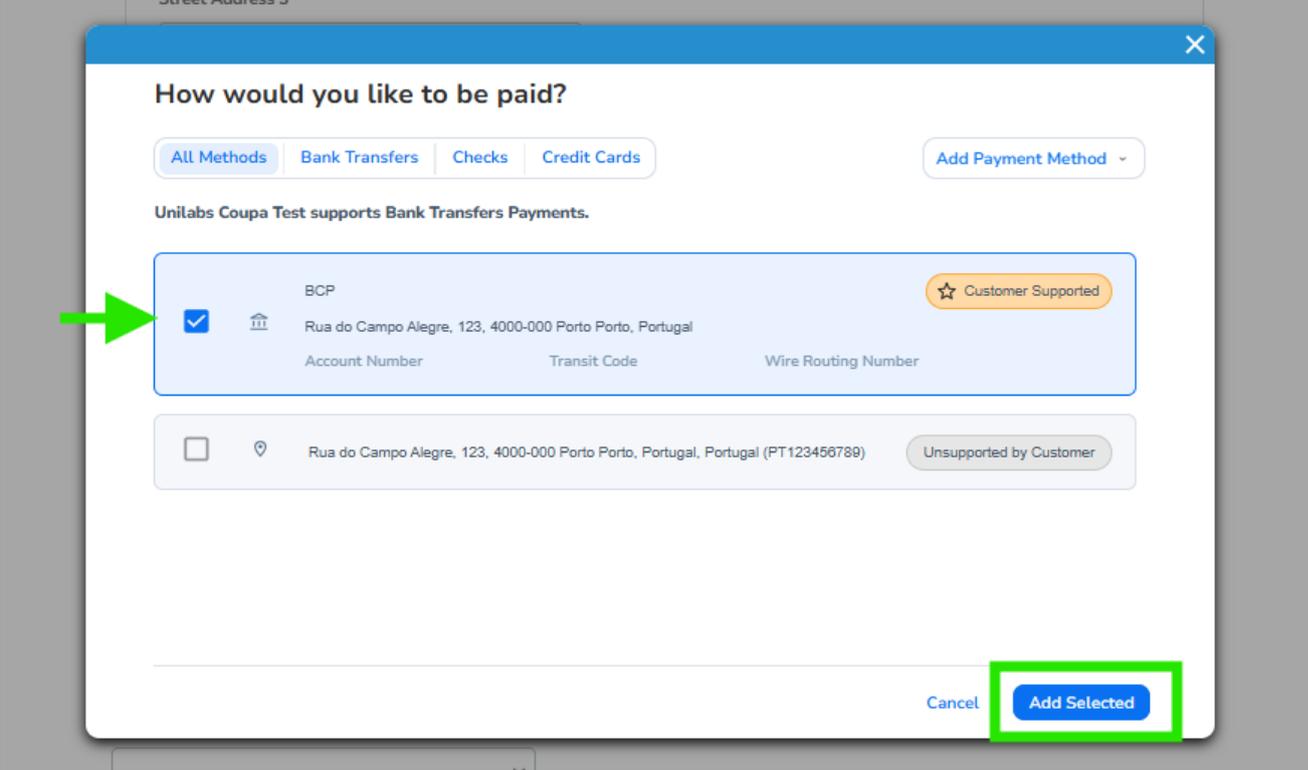
▼

The three letter Inco term code for the supplier's commercial terms.

Shipping Terms

Select Bank Information: If you have completed all previous sections correctly, you should then have access to the section where you can select the bank account data you added earlier (see Figure 6).

Figure 10



The screenshot shows a modal window titled "How would you like to be paid?". At the top, there are tabs for "All Methods", "Bank Transfers", "Checks", and "Credit Cards", along with an "Add Payment Method" button. Below the tabs, a message states "Unilabs Coupa Test supports Bank Transfers Payments." Two payment method cards are displayed. The first card, for BCP, is selected (indicated by a blue checkmark and a green arrow) and includes a "Customer Supported" badge. The second card is marked "Unsupported by Customer". At the bottom right, there are "Cancel" and "Add Selected" buttons, with the "Add Selected" button highlighted by a green box.

Follow System Rules: Make sure to follow the system rules and confirm that your data matches the expected format and requirements. This ensures your information is accurate and meets all the necessary criteria.

Figure 11

*** Remit- Io Addresses**

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

[Add Remit-To](#)

*** Bank Details**

*** Bank Name**

Bank Country/Region

Portugal

*** Bank Account Number**

must be 13 digits

*** SWIFT Code (BIC)**

Submit Your Information: After verifying your data and reviewing all your information, scroll down to the bottom of the page and click **submit for approval**. Please **ensure** you do this, as failure to submit will prevent us from receiving your data.

This is the end of the general process and we'll review your data.

Figure 12

Please ensure you **Submit the form for Approval** once you have completed it. If you need to make further changes, please **Save** the form so you can submit it at a later time.

[Decline](#) [Save](#) [Submit for Approval](#)

0 Comments [Mute Comments](#) ▾

Additionally, if you want to add a second Bank Account: In case you want to add another bank account, go to the "**Remit To**" section and click on "**Add Remit-To**" as shown below. Follow the prompts to enter the new bank account information

Figure 13

*** Remit-To Addresses**

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

[Add Remit-To](#)

*** Bank Details**

*** Bank Name** ✕

BCP

Bank Country/Region

Portugal ▾

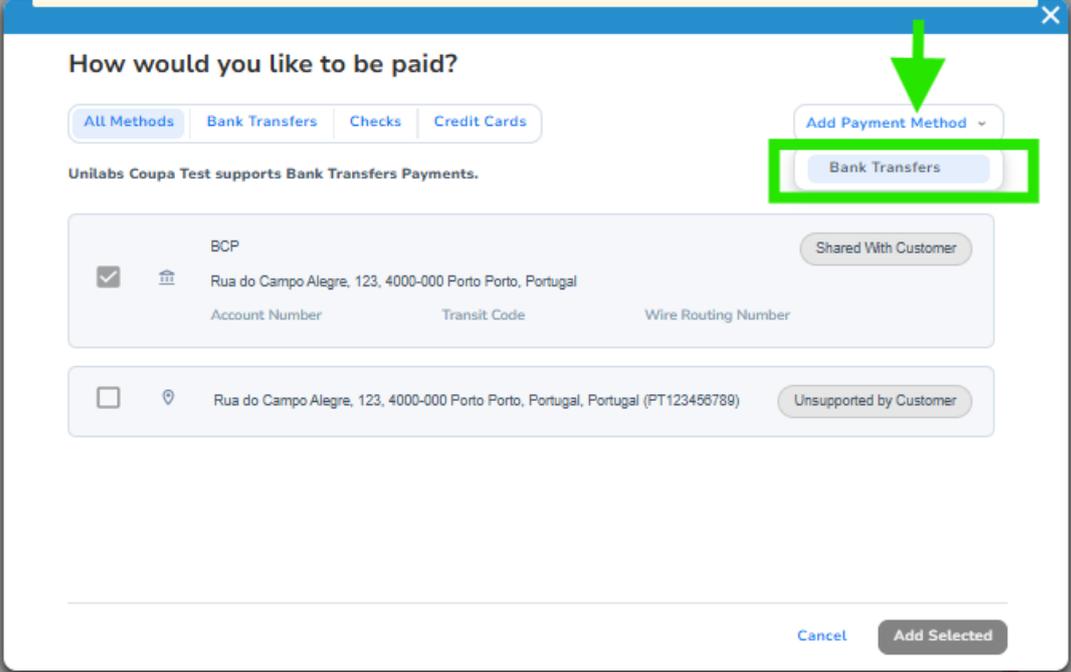
*** Bank Account Number**

0043656000124 ⓘ

*** SWIFT Code (BIC)**

BCOMPTPL ⓘ

Figure 14



How would you like to be paid?

[All Methods](#) [Bank Transfers](#) [Checks](#) [Credit Cards](#)

[Add Payment Method](#)

Bank Transfers

Unilabs Coupa Test supports Bank Transfers Payments.

BCP Shared With Customer
Rua do Campo Alegre, 123, 4000-000 Porto Porto, Portugal
Account Number Transit Code Wire Routing Number

Rua do Campo Alegre, 123, 4000-000 Porto Porto, Portugal, Portugal (PT123456789) Unsupported by Customer

[Cancel](#) [Add Selected](#)

BCP

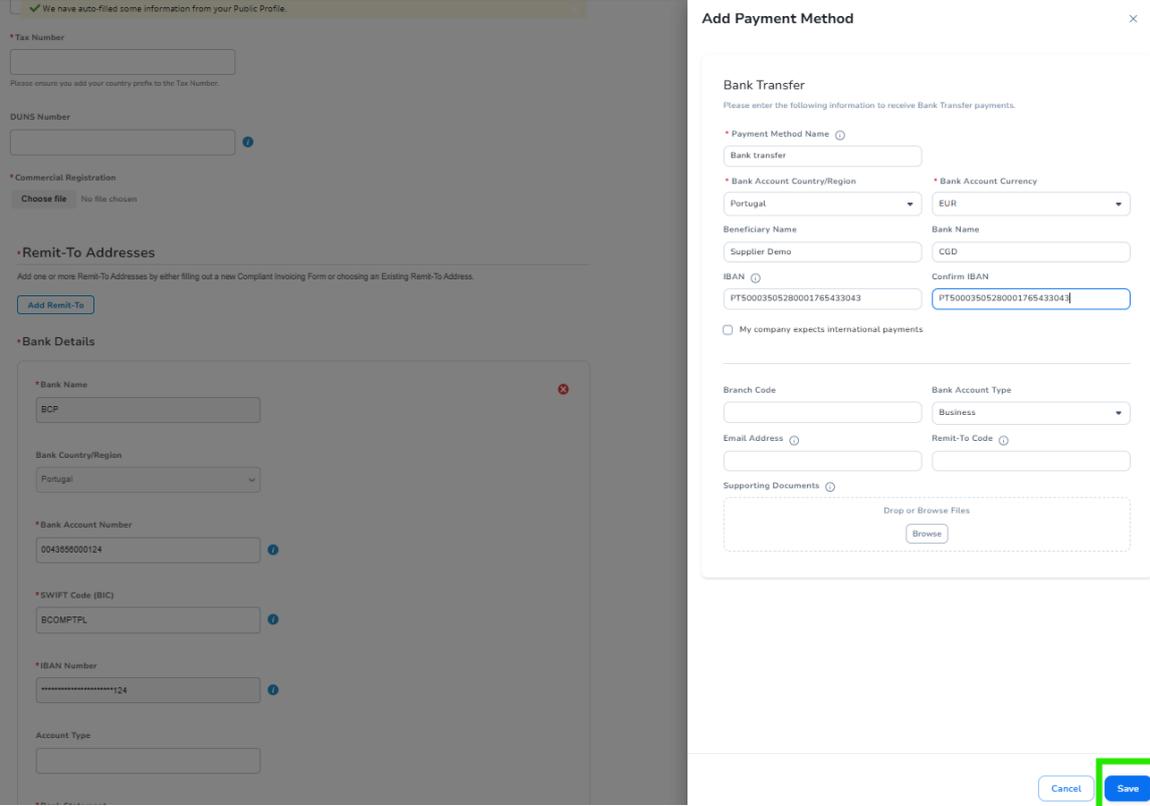
Bank Country/Region
Portugal

* Bank Account Number
0043856000124

* SWIFT Code (BIC)
BCOMPTPL

* IBAN Number
*****124

Figure 15



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

* Tax Number
[Input field]
Please ensure you add your country prefix to the Tax Number.

BUNS Number
[Input field]

* Commercial Registration
Choose file No file chosen

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

* Bank Details

* Bank Name
BCP

Bank Country/Region
Portugal

* Bank Account Number
004386000124

* SWIFT Code (BIC)
BCOMPTPL

* IBAN Number
[Input field]

Account Type
[Input field]

Add Payment Method

Bank Transfer
Please enter the following information to receive Bank Transfer payments.

* Payment Method Name
Bank transfer

* Bank Account Country/Region
Portugal

* Bank Account Currency
EUR

Beneficiary Name
Supplier Demo

Bank Name
CGD

IBAN
PT50003505280001765433043

Confirm IBAN
PT50003505280001765433043

My company expects international payments

Branch Code
[Input field]

Bank Account Type
Business

Email Address
[Input field]

Remit-To Code
[Input field]

Supporting Documents
Drop or Browse Files
[Browse]

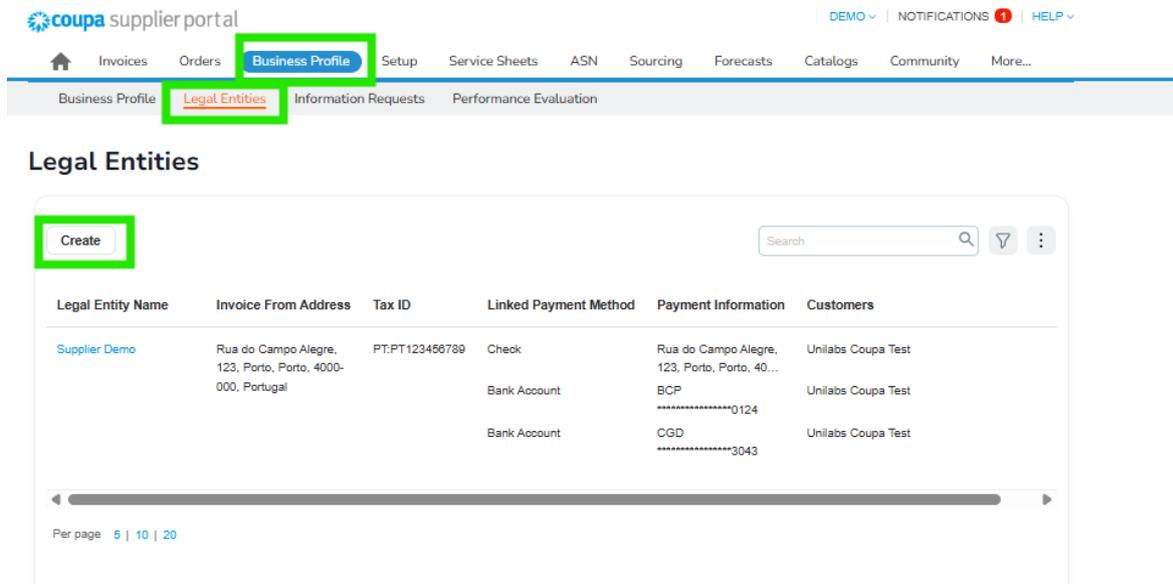
[Cancel] [Save]

In case you get an error for a missing IBAN, follow the next steps

Missing IBAN Issue: If you do not see the IBAN field in the previous window when adding a bank account, follow these steps:

- Go to **Business Profile** → **Legal Entities** → **Create**.
- Fill in the requested information as instructed.

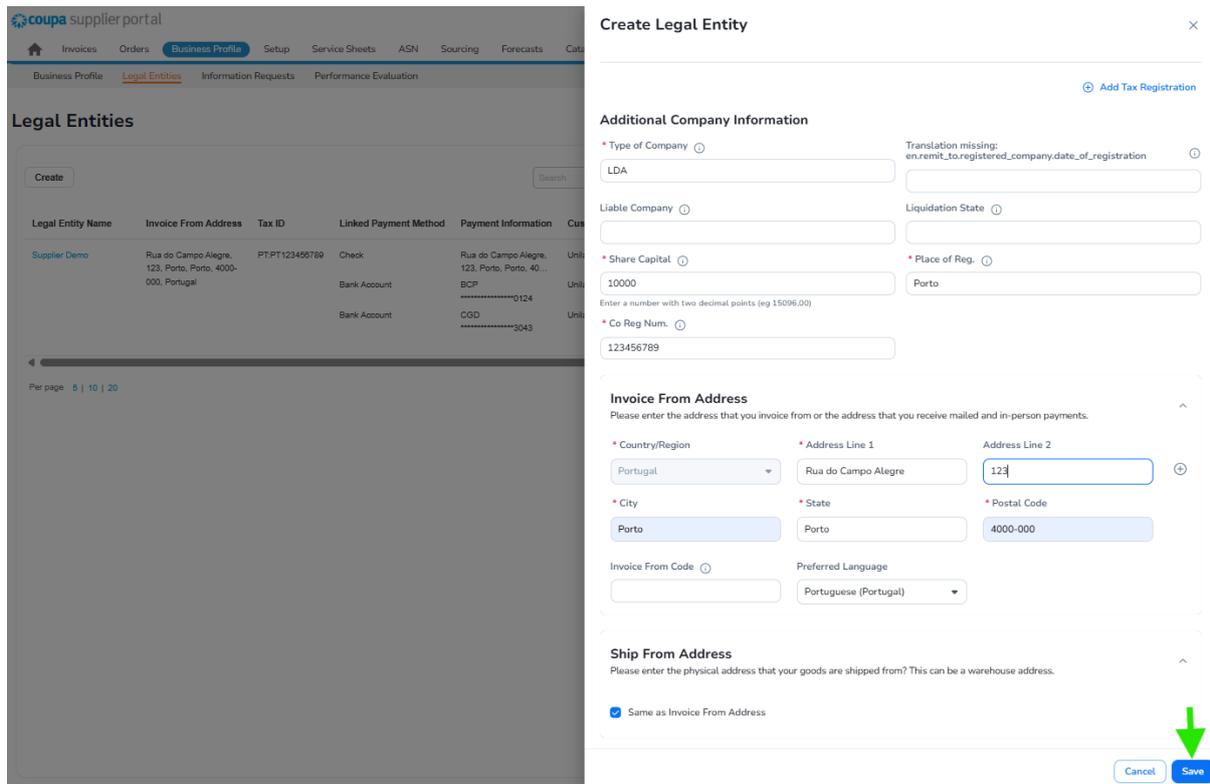
Figure 16



Legal Entities

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
Supplier Demo	Rua do Campo Alegre, 123, Porto, Porto, 4000-000, Portugal	PT:PT123456789	Check	Rua do Campo Alegre, 123, Porto, Porto, 40...	Unilabs Coupa Test
			Bank Account	BCP *****0124	Unilabs Coupa Test
			Bank Account	CGD *****3043	Unilabs Coupa Test

Figure 17



Create Legal Entity

[Add Tax Registration](#)

Additional Company Information

* Type of Company Translation missing: ent_remit_to_registered_company.date_of_registration

Liabile Company

* Share Capital * Place of Reg.

Enter a number with two decimal points (eg 15096.00)

* Co Reg Num.

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region * Address Line 1 Address Line 2

* City * State * Postal Code

Invoice From Code Preferred Language

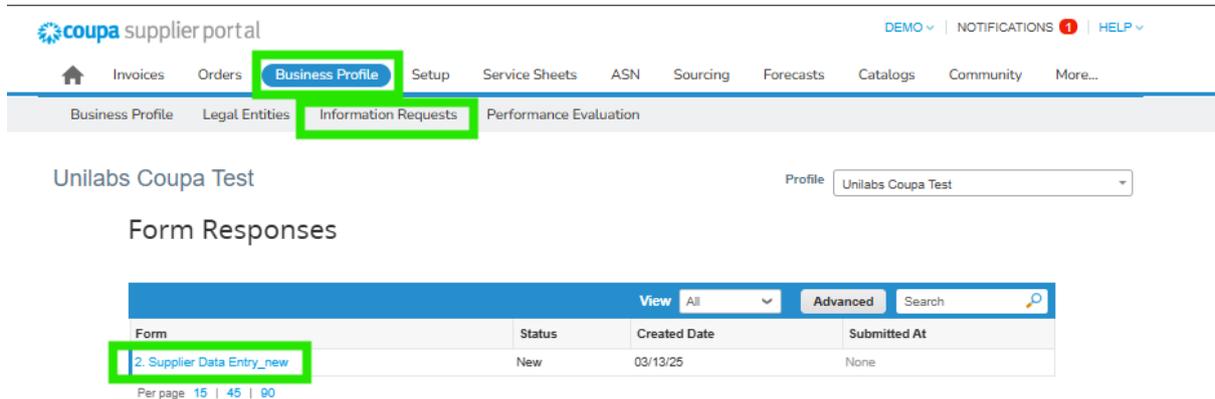
Ship From Address

Please enter the physical address that your goods are shipped from? This can be a warehouse address.

Same as Invoice From Address

Return to the Form: Once you have created the Legal Entity as shown in the previous step, you can return to the form and continue filling out the requested information.

Figure 18



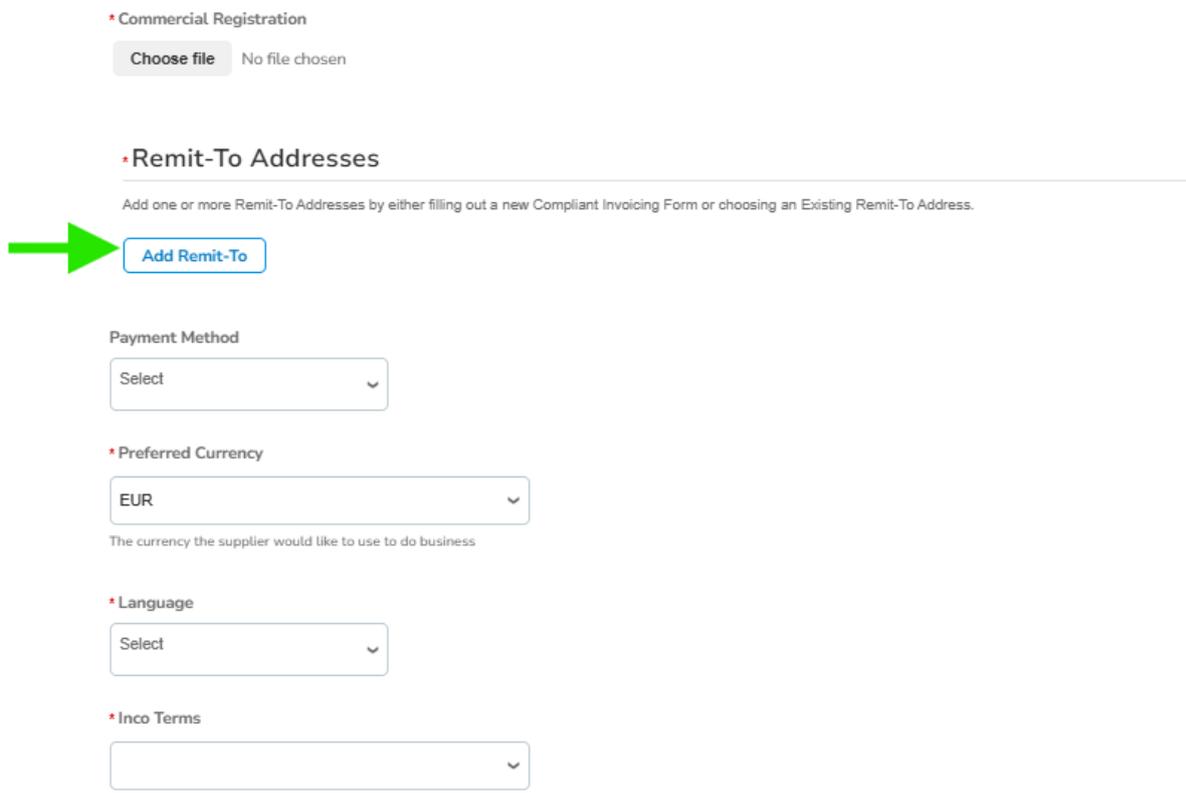
The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', 'DEMO', 'NOTIFICATIONS', and 'HELP'. The main navigation menu has 'Business Profile' highlighted. Below it, a sub-menu shows 'Business Profile', 'Legal Entities', 'Information Requests', and 'Performance Evaluation'. The page title is 'Unilabs Coupa Test' and the profile is 'Unilabs Coupa Test'. The section is titled 'Form Responses' and contains a table with the following data:

Form	Status	Created Date	Submitted At
2. Supplier Data Entry_new	New	03/13/25	None

Additional details include 'View All', 'Advanced', 'Search', and 'Per page 15 | 45 | 90'.

Add Bank Account in "Remit To" Section: You may now add your bank account in the "Remit To" section. Please ensure you follow the steps as shown and **select the Legal Entity** you created previously when prompted.

Figure 19



The screenshot shows the 'Remit-To Addresses' section. It includes a 'Commercial Registration' section with a 'Choose file' button and 'No file chosen' text. Below it is the 'Remit-To Addresses' section with a description: 'Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.' A green arrow points to the 'Add Remit-To' button. Below this are several dropdown menus for 'Payment Method' (Select), 'Preferred Currency' (EUR), 'Language' (Select), and 'Inco Terms'.

Street Address 3

How would you like to be paid?

[All Methods](#) | [Bank Transfers](#) | [Checks](#) | [Credit Cards](#)

Unilabs Coupa Test supports Bank Transfers Payments.

[Add Payment Method](#) ▾

Bank Transfers

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

* Street Address
Rua do Campo Alegre

Street Address 2
123

Street Address 3

Street Address 4

* City
Porto

* Postal Code
4000-000

Location Code

Organization Type

Parent Company Name

Add Payment Method

* Associated Legal Entity
Supplier demo 1

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name

* Bank Account Country/Region: Portugal | * Bank Account Currency: EUR

Beneficiary Name | Bank Name

IBAN | Confirm IBAN

My company expects international payments

Branch Code | Bank Account Type: Business

Email Address | Remit-To Code

Supporting Documents
Drop or Browse Files
[Browse](#)

[Cancel](#) [Save](#)

Follow System Rules: Make sure to follow the system rules and confirm that your data matches the expected format and requirements. This ensures your information is accurate and meets all necessary criteria.

Submit Your Information: After verifying your data and reviewing all your information, scroll down to the bottom of the page and click **submit** for approval. Please **ensure** you do this, as failure to submit will prevent us from receiving your data.