

CSP Profile Update

Accessing the Coupa Supplier Portal (CSP) to Update Supplier Information

This Quick Reference Guide (QRG) outlines the steps for existing supplier to update record details in Coupa Supplier Portal, including how to modify supplier information, submit changes for approval, and ensure records remain accurate and compliant.

CSP Profile Update

A supplier update form in Coupa is used to capture and process changes to an existing supplier's information in a controlled, auditable way. It ensures that supplier initiated updates, such as address changes, banking details, primary contacts, PO email, Tax information and other key information are routed through the appropriate approval workflow, reviewed by the right internal teams, and accurately reflected in the supplier record. Follow the below steps to submit a change request for Suppliers.

NOTE: To ensure your company information is correctly updated in our systems, all changes must be submitted through Coupa Supplier Information Management (SIM) Information Request. Updating your details directly in the Coupa Supplier Portal (CSP) does not automatically update in other Coupa systems, so updating in Coupa SIM ensures your information is accurately reflected in all connected systems and avoids delays in processing orders or payments

STEP 1: Access Supplier Dashboard in [Coupa Supplier Portal \(CSP\)](#).

STEP 2: On the Homepage, navigate to the [Business Profile](#), then click [Information Requests](#).

Business Profile

Information Requests

STEP 3: Click [SIM: External Supplier Populated_Supplier](#) hyperlink under [Form](#).

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Form

SIM: External Supplier Populated_Supplier_v20

NOTE: Only Applied forms should be selected.

STEP 4: After you have accessed the form, click the [Update Info](#) button located at the very bottom of the form.

Update Info

Supplier Company Information Updates

If needed, update the basic supplier company details:

Allowable Fields to Update: Code of Conduct, Company Subsidiary, Company Name, DBA Name, Tax Organization Type, Conflict of Interest.

Re-Confirm/Accept the [Code of Conduct](#), [Conflict of Interest](#), and [Company Subsidiary](#) information between ABM and the Supplier. Confirm if Yes or No. (Required)

NOTE: If ABM's [Code of Conduct](#) is not checked/agreed to, you will not be able to proceed with any updates. This will need to be reconfirmed each time an update is submitted.

NOTE: If Yes is selected for [Conflict of interest](#), you will be required to confirm the relationship between ABM and Supplier. This will need to be reconfirmed each time an update is submitted.

NOTE: If Yes is selected for [Company Subsidiary](#) you will be required to confirm the Parent company name. This will need to be reconfirmed each time an update is submitted.

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Code of Conduct

* Do you accept ABM's Code of Conduct?

Checking this box acknowledges you have read and agreed to [ABM's Code of Conduct](#).

* Are you a subsidiary of another company?

Yes

No

Conflict of Interest

* Are you aware of any potential conflict of interest between the supplier and ABM?

Yes

No

Supplier Primary Address Updates

If the Supplier's Primary Address is changing, override the old/existing primary address details with the new primary address. All fields except for the State ISO Code are editable.



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Allowable Fields to Update: Country/Region, State/Region, Street Address, City, Postal Code.

NOTE: The **State ISO Code** will auto-default from the **State Region** selection.

NOTE: The **Address Name** field in the primary address section should not be updated by any group except the Vendor Stewards. Do not edit this section.

*** Region**

Country/Region
United States

State Region
Colorado - CO

State ISO Code
US-CO

*** City**
Denver

Address Name
Primary

*** Postal Code**
80249

*** Street Address**
8500 Peña Boulevard

Supplier Contact Information Updates

If the Supplier's Primary Contact information is changing, override the old/existing contact details with the new **primary contact**.

Allowable Fields to Update: (1) First Name, (2) Last Name, (3) Email Address, (4) Primary Phone Number, and (5) Secondary Phone Number.

NOTE: Changes made to the primary contact using this form will not affect the Supplier's Coupa Supplier Portal (CSP) account details. The supplier will retain the ability to manage POs and Invoices via their CSP account.

Commented [MR1]: @Nicholas Ricketts can we add a screen shot of the fields being editable

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NOTE: If the supplier would like to fully change the ownership of their CSP profile, their CSP Admin can change account ownership from the **User Administration** page.

* First Name

* Last Name

* Email Address

This email address will be used to send the supplier information invite.

*Invites to the supplier will only be sent externally for Procurement Managed Subcontractors/Non-Subcontractors. External supplier onboarding invite requests will not be sent for Non-Procurement Suppliers.

* Primary Phone
US/Canada
650-555-1212

Please enter a valid phone number based on the selected country. Format must follow local number formatting rules.

Secondary Phone
US/Canada
650-555-1212

Please enter a valid phone number based on the selected country. Format must follow local number formatting rules.

Tax Documentation Information Updates

Tax Documentation: Suppliers are only permitted (1) Tax Registration number. If the Tax documentation information is being updated you may select an option from the dropdown lists provided.

Allowable Fields to Update: (1) Tax Region, (2) Tax Classification, (3) Tax ID Type

NOTE: If International is selected for Tax region, you will be required to confirm the International Tax classification.

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* Tax Region

* Tax Classification

* Tax ID Type

Tax Registration and Document Information Updates

1. **Tax Registrations:** The tax registration Country and number fields can be overwritten, or removed using the close button. 

A new tax registration can be added by clicking the "Add Tax Registration" button.

[Add Tax Registration](#)

Allowable Fields to Update: (1) Country (2) Is 1099 Reportable?, (4) 1099 Tax Classification

NOTE: **Do not change** your **Tax ID number**. If you have obtained a new Tax ID, you will be issued a new supplier number, and the entire onboarding process will need to be restarted.

NOTE: **Local Checkbox** - This should not be used.

NOTE: If Yes is selected for **Is 1099 Reportable?**, then you will be required to confirm 1099 Tax Classification from available options.

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NOTE: 1099 Tax Classification selection is required only if 1099 Reportable is Yes.

*** Is 1099 Reportable?**

Yes

No

Indicate here if you are 1099 Eligible.

1099 Tax Classification

Select

Search for appropriate Tax Classification from the dropdown list.

- CONSUMER PRODUCTS (MISC9)
- CROP INSURANCE PROCEEDS. REPORTED IN 1099 (MISC10)
- EXCESS GOLDEN PARACHUTE PAYMENTS (MISC13)
- FEDERAL INCOME TAX WITHHELD (MISC4)
- FISH PURCHASED FOR RESALE (MISC11)
- FISHING BOAT PROCEEDS (MISC5)

2. **Tax Document:** New tax documentation can be added. Select the Type using the dropdown, and a new attachment can be added by clicking Add File.

Allowable Fields to Update: (1) Tax Doc Type (W8 or W9), (2) Attachments.

NOTE: Each new file upload will replace any pre-existing ones.

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Tax Document

* Type

W8

W8

W9

Add File

BLANK_PAYMENT_TERMS.pdf

Please attach your signed tax form. If you are a US supplier, attach your W9. If you are a foreign supplier doing business with the US, attach your W8.

Payment Remittance (Financial) Information Updates

As the supplier you are able to add new Remit-To's, Remove existing remittance info, as well as Inactivating existing remit to's.

Once a remit-to has been created and approved on your profile, that remit-to can only be (1) Removed or (2) Inactivated. This is due to Coupa's design to prevent potential fraudulent activity.

1. **Add Remit-to:** Suppliers are able to add new remit to information by clicking the "Add Remit-to" button.

When clicked the Allowable Fields to Update includes: (1) Street Address, (2) City, (3) Country/Region, (4) State, (5) Postal Code (6) Payment Method, (7) Remit To Contact Email, (8) Account Currency.

NOTE: If Virtual Card payment method is selected, then Remit to contact email address is required. However, If ACH is selected for payment method, then additional fields including (1) Banking Region, (2) Bank Account Number, (3) Bank Routing Number, (4) Supporting Documents, (5) Bank Account Type, (6) Master Bank Name, and (7) Bank Address fields will be required to proceed.

NOTE: If a Non-US institution is selected for Banking Region, you will be required to confirm an **IBAN Number** and **SWIFT Code (BIC)**.

2. **Inactivate Remit-to:** If Existing Remit To Details need to be inactivated, Change the Active flag to Inactive from the dropdown status options.
3. **Remove Remit-to:** If Existing Remit To Details need to be removed, Click the red X.

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NOTE: If remit to details are removed using the red x, you will not be able to undo this action. Supplier will have to click the Add remit to button to enter in new details.

• 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

• Payment Remittance Information

Active

Active

Inactive

Billing Address Information

Minority /Diversity Classification Updates

Minority/Diversity Classifications can be updated via this section. If a Supplier already has minority/diversity details submitted, the details will display in this section. If new diversity details need to be submitted, click the Add Diversity button to add diversity details. Repeat this process for all applicable diversity categories.

Minority / Diversity Classification

Note: If this supplier qualifies under multiple diversity categories, please create a separate entry for each category by clicking the "Add" button.

Supplier Diversity

If you are a small or diverse business, add the categories that apply to you.

Add Diversity

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NOTE: The "Add Diversity" button will only appear if you have indicated Yes to "Is this a certified diverse supplier?" Question.

PO Email Information Updates

If a PO email needs to be updated, the PO email field is where you can make the necessary changes. The PO email field may already be populated with values previously entered. To update, simply remove the old email and add in a new PO email as required. This field cannot remain blank.

* PO Email

Andythompson@gmail.com



Provide the email address that Purchase Orders should be sent to.

Purchasing Site Information Updates

If a purchasing address needs to be inactivated, click the red x icon at the right corner of each purchasing address that need to be inactivated.

NOTE: If the red x is selected, this will remove the address from this section entirely and this can not be reversed. Please use caution before proceeding with removing (inactivating) a purchasing address. If a new purchasing address is needed click the Add Address button and add all required fields for address capture, (1) Country/Region, (2) State Region, (3) Address Name, (4) Street Address Line(2), (5) City, and (6) Postal Code.

• Addresses

Add one or more Addresses.

Add Address

• Purchasing Site Address

Address Purpose

Select Some Options

• Region

Country/Region

Purchasing and Pay Address Association

If Purchasing and Pay address association needs to be updated, the Purchasing and Pay address association field is where you can make the necessary changes. This field may already be populated with values previously entered. To update, simply remove the old information and add in the new Purchasing and Pay address association as required. This field cannot remain blank.

Purchasing & Pay Address Association

Example of message to include in the "Purchasing & Address Details" box:

Remit To Address #1: 123 Main Street, PO Box 456, Boston, MA 02108 with **PO Method #1:** Email: SupplierRentals@EmailDomain.Com and **Purchasing Address:** 1212 Lane Dr., PO Box 72, Newton, MA 02461.

Remit To Address #2: 1010 Main Street, PO Box 12, Boston, MA 02108 with **PO Method #2:** cXML PO/Invoicing (Please connect with Integration contact for cXML integration setup) and **Purchasing Address:** 7840 Waters Dr., Boston, MA 02108.

* Explanation of Purchasing & Address Association

Remit To Address #1: 123 Main Street, PO Box 456, Boston, MA 02108 with PO Method #1: Email: SupplierRentals@EmailDomain.Com and Purchasing Address: 1212 Lane Dr., PO Box 72, Newton, MA 02461.

- Please provide a detailed explanation of how your purchasing and payment remittance details should be connected.
- If you envision having more than one PO method please explain in this box (i.e., all rentals should be sent via email to example@email.com, and all non-rental items/services should be sent electronically via cXML).

NOTE: Numbering your purchasing sites and corresponding remit site is **critical**. Each purchasing should have a corresponding remit site and a PO Email address.

Commented [NR3]: Per Raza - Will need additional direction/notes from Sharon.

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Submit the Form for Approvals

Submit the updated form for Approval. Click the **Submit for Approval** button when all updated details have been populated. Alternatively, if the form needs to be saved and resumed later, click the **Save** button located at very bottom of the form, to the left of the Submit for Approval button.



Are clicking the submit for approval, your form will be sent to the Pending Approval status and you will receive confirmation of submission.



You can also navigate to your forms using the "Information Requests" tab. You will be able to confirm your new form status along with created and submission date.

Form	Status	Created Date	Submitted At
SIM: External Supplier Populated_Supplier_v20	Pending Approval	02/09/26	02/10/26

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Note: Once ABM has reviewed and actioned your form, status will be updated to Applied.