

**01 – Getting Started  
with Coupa Supplier  
Portal (CSP)**



**Bank of  
Ireland  
Group**



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# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (1/8)



You should receive the email below with the subject line '**New CSP Supplier SIM Invitation**', asking you to provide your supplier information in Coupa. Please note below is the standard Coupa text for the invitation, you might be receiving a customised version.



Powered by coupa

Bank of Ireland

## New CSP Supplier SIM Invitation

Hello Supplier,

Bank of Ireland has chosen Coupa as their supplier management platform.

In order to prevent lost documents and ensure you are paid on time, Bank of Ireland has requested you to provide information about your company.

Within the next 48 hours, please respond below to provide this information.

Bank of Ireland

**NOTE:** The invitation will be sent from the email address [do\\_not\\_reply@bankofireland.couphost.com](mailto:do_not_reply@bankofireland.couphost.com) to the primary contact email (existing in BOI records). Once registered, you may add more users to your company's account (see section 03 of this Training Pack).

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (2/8)



## Create an account

Bank of Ireland uses Coupa to transact and communicate with you.  
If you can't provide this info, please send it to the right person who manages accounts.

[Forward this to someone](#)

\* Business Name  
GreenTech Innovations Ltd  
Your legal business name (or legal personal name if an individual)

\* Email

\* First Name: Monica  
\* Last Name: Miller  
Cannot contain special characters or symbols (like !, ?, \*, &, <, >).

\* Password: \*\*\*\*\*  
\* Confirm Password: \*\*\*\*\*  
Use at least 8 characters and include a number and a letter.

\* Country/Region: Ireland  
\* VAT ID: IE1234567X

I do not have a Tax ID

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

[Create an account](#)

Already have an account? [Log in](#)

← **2** Fill in the mandatory information marked with \*, as shown below. Some of the fields are pre-populated based on the information already stored by BOI. Feel free to update these fields if necessary.

**If you are not the appropriate contact** to receive this invitation and manage your company's CSP account, you may use the **'Forward this to someone'** to send to an appropriate contact in BOI.

**3**

## Create an account

Bank of Ireland uses Coupa to transact and communicate with you.  
If you can't provide this info, please send it to the right person who manages accounts.

[Forward this to someone](#)

\* Business Name  
GreenTech Innovations Ltd  
Your legal business name (or legal personal name if an individual)

**NOTE:** If you are already using Coupa Supplier Portal with other clients, instead of creating a new account click on the **Log in** option at the bottom of the page to log in to your existing account and link it to BOI

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (3/8)



After clicking on **Create an account**, you will be sent a 6-digit code on your email address, to verify its correctness.

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6-digit code



Your Coupa Verification Code

Below is the secure verification code you requested. Enter the 6-digit code in Coupa to verify it's you.

938894

If you didn't request this code please contact us at [supplier@coupa.com](mailto:supplier@coupa.com).

## Email Verification

We sent a one time verification code to monica.streng+7@accenture.com

9 3 8 8 9 4

Didn't receive the Verification Code? [Request a New Code](#)

Enter Code



Next

"Next"



5

Enter code when prompted, then click **'Next'**:

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (4/8)



Next a new page will be displayed prompting you to join an existing account. **We recommend you DO NOT use this option** as your company might have several accounts and you might not select the appropriate one. Instead, if you know which account your company is currently using, we recommend you use the **Log in** option mentioned above.

If not, please select the option **No, continue creating a new account** as shown below and click on **Next**:



## Join an Existing Account?

Provide any of the additional info to get better suggestions.

A screenshot of the "Join an Existing Account?" form. The form has a radio button selected for "View existing accounts matching the email domain". Below this are several input fields: "Business Name" (with "GreenTech Innovations Ltd" entered), "Country/Region" (with "Ireland" selected in a dropdown), "Address Line 1", "City", "State", "Postcode", "Tax ID" (with "IE1234567X" entered), and "DUNS Number". Below the form, there are two buttons: "No, continue creating a new account" (which is selected with a checkmark and highlighted with a green border) and "Next" (highlighted with a blue border).

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (5/8)



You will then be asked if you want to make the account public or not. **You should select the option of your choice.**

### Data Privacy

Make your business information public to make it easier for customers to work with you.

Do not publish my business profile.

Publish all my business profile details

Save

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# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (6/8)



8

The next step is to fill out your Business Profile information. Only the fields marked with \* are mandatory:

- 1 - 5 **Mandatory**
- 6 **Click to continue**

**Onboarding for bankofireland-test (Coupa Supplier Portal)**  
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal.

1 ————— 2  
Account Details ————— Payment Methods  
Provide the main address associated with your business. (Virtual Card | Bank Transfer | Remit-To Address)

**Primary Address** ✓ ✦

\* Country/Region: Ireland  
\* Address Line 1: 123 Green Avenue  
Address Line 2: Address Line 2  
\* City: Dublin  
\* State: Dublin  
\* Postcode: D04 XYZ7

Ireland

Liquidation State  
Preference Agreement  
Company in examinership  
Company is being wound up  
Receiver of the property of a company has been appointed  
Invoice-From Code  
Preferred Language: English (Ireland)

Save and Next

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (7/8)



The **Bank Transfer** section comes up next.

**9** Fill in the mandatory bank details and click on **Save and Next** to proceed:

- 1 - 7 **Mandatory**
- 8 **Click to continue**

## Onboarding for bankofireland-test (Coupa Supplier Portal)

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

Primary Address saved successfully



Account Details

Provide the main address associated with your business.



Payment Methods

(Virtual Card | Bank Transfer | Remit-To Address)

### Bank Transfer

Please enter the following information to receive Bank Transfer payments.

|     |   |  |               |
|-----|---|--|---------------|
| 1 → | Account Nickname * ⓘ<br>EUR BOI Account   | Beneficiary Legal Name * ⓘ<br>GreenTech Innovations Ltd. | ← 5           |
| 2 → | Bank Branch Country / Region *<br>Ireland | Bank Account Currency *<br>EUR                           | ← 6           |
| 3 → | Bank Name *<br>Bank of Ireland            | IBAN *<br>IE79 BOFI 9311 5212 3456 78                    | ← 7           |
| 4 → | SWIFT / BIC Code * ⓘ<br>BOFIE2D           | Branch Code ⓘ<br>  |               |
|     |   | 8 →  | Save and Next |

# 01.a. How to Create a Coupa Supplier Portal (CSP) Account (8/8)



**Your registration to Coupa Supplier Portal is now complete!**

The only pending task is to fill out some additional details that BOI needs to ensure your prompt payment in the new system.

Click on **Pending Forms** to open the supplier onboarding form and make sure you are all set up to work with BOI in Coupa P2P (for instructions on how to complete the supplier onboarding form, see section 02 of this Training Pack).

The screenshot shows a green notification bar at the top with a checkmark icon and the text: "Great News! The payment information has been successfully shared with the following customers and has been validated: Bank of Ireland". Below this is a white rounded rectangle containing the text: "Thank you for joining!", "bankofireland-test needs more information from you.", and "Complete the pending forms on the following page to transact with bankofireland-test.". To the left of this rectangle is a blue circle with the number "10". Below the circle is a blue box with the text "Pending Forms" and a blue arrow pointing to a blue button labeled "Pending Forms".

**NOTE:** The link to use for subsequent logins to your CSP account is: <https://supplier.couphost.com/sessions/new>

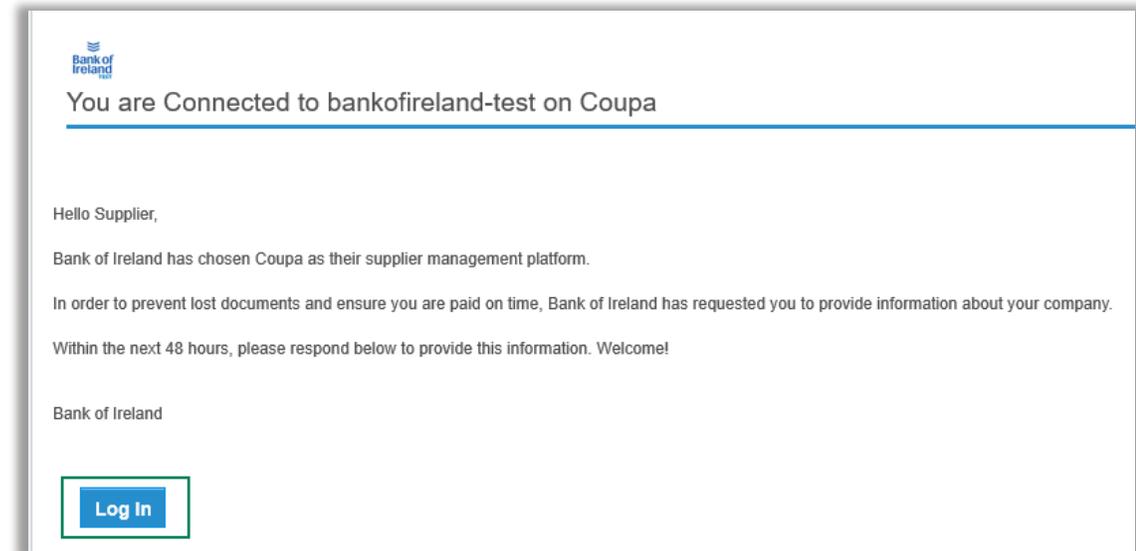
## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (1/6)



**If you are already using the Coupa Supplier Portal with other clients, the procedure of adding Bank of Ireland Group among your list of clients in your existing account is as follows.**

Make sure **you provide to BOI the email address of your existing CSP account as primary contact**, so that the invitation to connect is sent on that email.

When the invitation to register to Coupa Supplier Portal is sent out by BOI, you will receive an email like the example screenshot. Click on the **Log In** button to connect your existing CSP account to Bank of Ireland Group and make it visible as a customer:



**Log In**

**1**

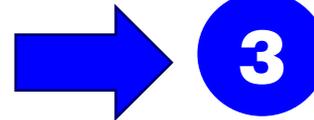
## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (2/6)



The Coupa Supplier Portal login page will open, **make sure your email address is correct and click on Continue:**

Enter your password and click on **Login:**

The screenshot shows the Coupa Supplier Portal login page. The 'Login' section has an 'Email' input field. A blue circle with the number '2' is overlaid on the email field. Below the input field is a blue 'Continue' button, which is also highlighted with a green box. At the bottom, there are links for 'New to Coupa? CREATE AN ACCOUNT' and 'Forgot your password?'.



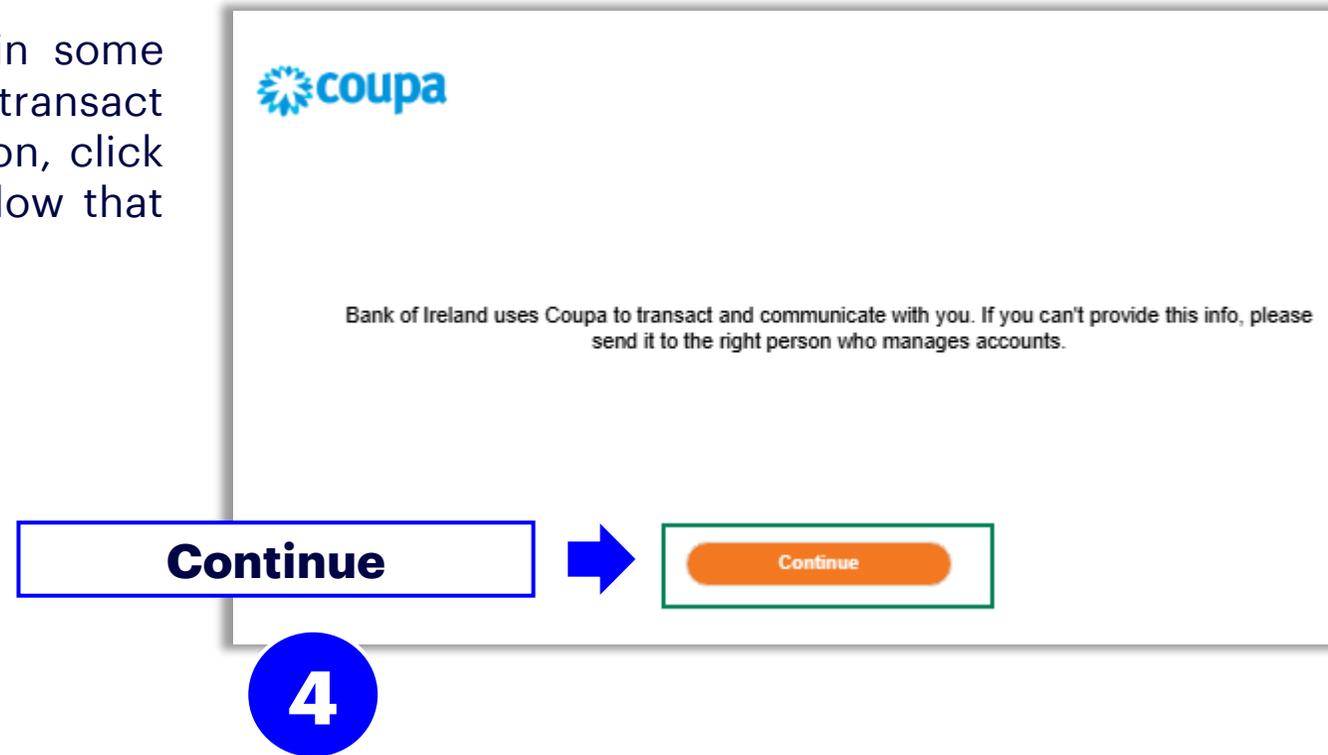
The screenshot shows the Coupa Supplier Portal login page. The 'Login' section has a 'Password' input field. A blue circle with the number '3' is overlaid on the password field. Below the input field is a blue 'Login' button, which is also highlighted with a green box. At the bottom, there are links for 'New to Coupa? CREATE AN ACCOUNT' and 'Forgot your password?'.

## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (3/6)



### Your existing CSP account is now linked to Bank of Ireland Group

However, you still need to fill in some additional details to be able to transact with BOI. To fill in this information, click on **Continue** in the pop-up window that opens upon login:



## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (4/6)



**The next pop-up window will prompt you to fill in Virtual Card details.**

BOI Group does not use virtual card payments, so you can simply tick '*Do not accept Virtual Card payments from this customer*' and proceed to **Save and Next**:

Virtual Card ⓘ  
Please enter the following information to receive Virtual Card payments.

Account Nickname \* ⓘ       Email Address \*

Process credit cards automatically

Do not accept Virtual Card payments from this customer

Cancel

Save and Next



Save and Next

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## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (5/6)



**Next, a pop-up window will be displayed with the list of the bank accounts you previously registered in your CSP account.**

You can either select one of the already existing accounts to be used for payments from BOI or, if not applicable, you can click on **Add New** and register an additional bank account to be used for your transactions with BOI. Once you are done, click on **Save and Next**:

The screenshot shows a 'Bank Transfer' selection screen. At the top, it says 'Bank Transfer' and 'Please enter the following information to receive Bank Transfer payments.' Below this is a list of accounts. The first account is selected, indicated by a blue checkmark in a circle. The account details are 'EUR Account' and 'Permanent TSB - \*\*\*\*\*0052'. To the left of the account list is a button labeled '+ Add New'. A blue arrow points from a blue box labeled 'Add New' to this button. Below the account list is a checkbox labeled 'Do not accept Bank Transfer payments from' with a blue circle containing the number '6' next to it. At the bottom of the screen are two buttons: 'Cancel' and 'Save and Next'. A blue arrow points from a blue box labeled 'Save and Next' to the 'Save and Next' button. A blue circle containing the number '7' is positioned above the 'Save and Next' button.

## 01.b. How to Link Your Existing CSP Account to Bank of Ireland (6/6)



**You have now completed the process of linking your existing Coupa Supplier Portal account with Bank of Ireland.**

To view your orders or create invoices for BOI, go to **Orders** or **Invoices** tab and select **Bank of Ireland** from the drop-down menu **Select customer**:

