03 – CSP Account Configuration and Administration

Bank of Ireland Group

Contents

Log into your CSP account

Go to **Setup** -> **Users** -> **Invite User**

1

Setup

Users

Invite User

2

The Invite User window will open

3 **Required Fields**

You only need to fill in the fields on the left-hand side and to tick the permissions you want to grant to the respective user, then click on **Send Invitation**.

4

Send Invitation

The invited user will be notified by email

They will click the **Join Coupa Supplier Portal** button on the invitation and will create a password to finalise the creation of their account:

Create an account

Grow your Business on Coupa with a Free Account

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

* Email

* First Name — Jane
* Last Name — Doe
Cannot contain special characters or symbols (like !, ?, *, &, <, >).

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

□ I accept the Privacy Policy and Terms of Use

Create an account
Already have an account? Log In

Action Required – Join the Coupa Supplier Portal

Hi Jane Doe,

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

coupa
Business Spend Management

6 Password →
7
Accept Ts & Cs ←
Join
8 Create Account →
5

03.b. How to Add Multiple Bank Accounts for Invoicing (1/4)

When you create your CSP account, you have the option to add bank details for a single bank account

If your company uses several bank accounts (e.g. in different currencies) in relation to the services provided to BOI, here is the process of adding additional bank accounts once your CSP account creation is complete:

❑ Log into your CSP account (https://supplier.coupahost.com/sessions/new), go to **Business Profile > Payment Methods**:
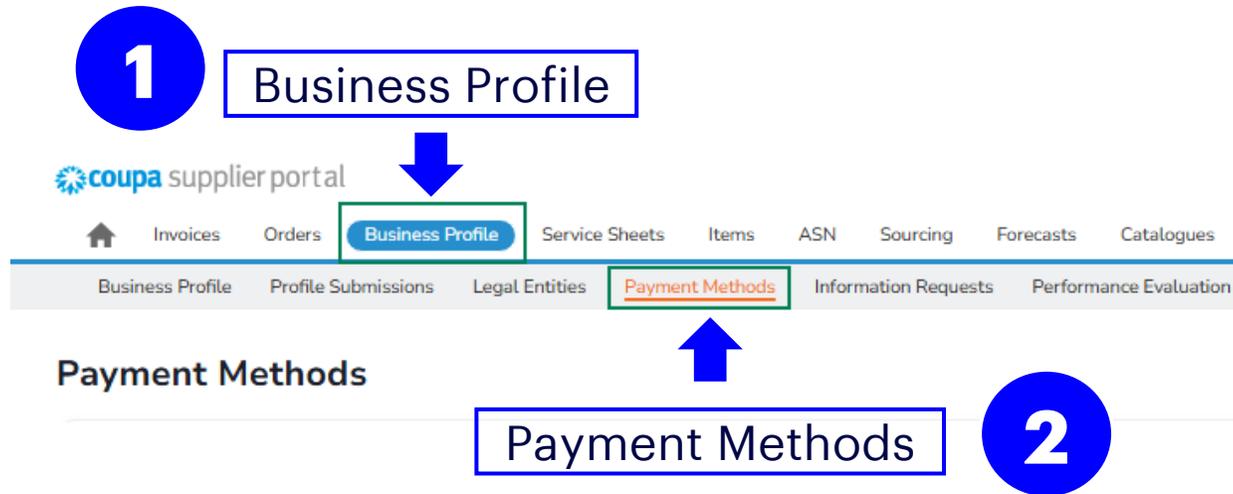
NOTE: The first time you go to the **Payment Methods** sub-tab you will be asked to enable Multifactor Authentication (MFA). You can find instructions about this procedure in section 03.d. of this guide.

03.b. How to Add Multiple Bank Accounts for Invoicing (2/4)

Click on **Add Payment Method** and select **Bank Transfer**:

Payment Method

Bank Transfer

3

Fill in at least the fields highlighted below and click on **Save:**

4 Highlighted Fields

Add Payment Method ✕

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * ⓘ
BOI GBP Account

Beneficiary Legal Name * ⓘ
GreenTech Innovations Ltd.

Bank Branch Country / Region *
Ireland

Bank Account Currency *
GBP

Bank Name *
Bank of Ireland

Account Number
31926819

IBAN
IE79 BOFI 9311 5212 3456 78

Transit Code Type ⓘ   Transit Code

SWIFT / BIC Code ⓘ
BOFIIE2D

Branch Code ⓘ

Additional Information

Bank Branch Address

Address Line 1

Address Line 2

+ Address Line 3

Townland/District

Post Town/City

County/Province

+ Subdivision ISO Code

Eircode

5 Save   Cancel   Save

> **You will then be asked to select the customers with whom you want to share this account.**

You must tick **Bank of Ireland** and click on **Save**.

Both accounts will now be displayed in the **Payment Methods** section, and you will be able to select the appropriate one when creating each invoice:

Add Payment Method

> Great News! The payment information has been successfully saved. ×

Select customers with whom you want to share GBP Account and click Save.

Customer	GBP Account
Select All	☐
Bank of Ireland	☑

Per page 5 | 10 | 20

BOI ← **6**

Cancel   Save

Save ← **7**

Payment Methods

> ✓ GBP Account has been linked with your customer(s). ×

Add Payment Method ▼

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
🏛 Bank Transfer	GBP Account	Ireland	GBP	GreenTech Innovations Ltd	Bank of Ireland	Active	✏ 🔗 ⚙ 🗑
🏛 Bank Transfer	EUR Account	Ireland	EUR	GreenTech Innovations Ltd	Bank of Ireland	Active	✏ 🔗 ⚙ 🗑

NOTE: If the account you are adding has not been used previously in relation to the Bank of Ireland Group (is not recorded in BOI SAP), you should also update the **Supplier Onboarding External Form** with these details. Instructions for this process can be found in section 02 of the Training Pack.

When you create your CSP account, you have the option to add details for a single legal entity

If you use the same email address in Coupa to manage several legal entities that provide services to BOI (e.g. offices in different countries), here is the process of adding additional legal entities once your CSP account creation is complete:

❑ Log into your CSP account (https://supplier.coupahost.com/sessions/new), go to **Business Profile > Legal Entities > Create**:

1 Business Profile

❀coupa supplier portal

🏠   Invoices   Orders   **Business Profile**   Service Sheets   Items

Business Profile   Profile Submissions   Legal Entities   Payment Methods

Legal Entities

Legal Entities **2**

Create

3 Create
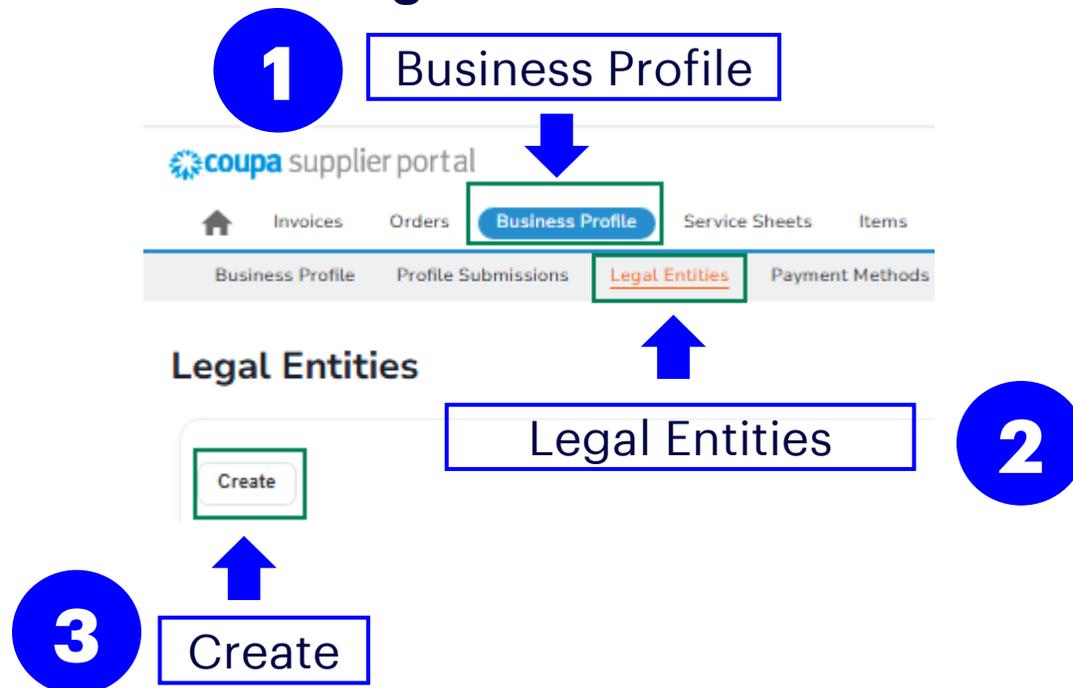
NOTE: The first time you go to the **Legal Entities** sub-tab you will be asked to enable Multifactor Authentication (MFA). You can find instructions about this procedure in section 03.d. of this guide.

Fill in the mandatory fields and click on 'Save':

4

1 - 8   Mandatory (*)

Create Legal Entity ✕

1 → Legal Entity Name *
GreenTech Innovations UK

2 ← Country/Region *
United Kingdom

Tax Registrations

3 → Country/Region *
United Kingdom

4 ← VAT ID *
GB123456789

☐ I don't have a Tax ID Number

⊕ Add Tax Registration

Additional Company Information

Type of Company * ⓘ
Ltd

5

Board of Directors ⓘ

Invoice From Address
Please enter the address that you invoice from or the address where you receive posted and in-person payments.

Country/Region *
United Kingdom

6 → Address Line 1 *
123 Baker Street

Address Line 2
Address Line 2 ⊕

7 → City *
London

State

8 ← Postcode *
W1U 6RY

Invoice-From Code ⓘ

Preferred Language
English (UK)

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

Remit-To Address
Please enter the address to which you receive in-person payments.

☑ Same as Invoice-From Address

5   Save → Cancel Save

You will then be prompted to associate a bank account with your newly created Legal Entity. Click on 'Continue' and then follow the steps described in the 'How to Add Multiple Bank Accounts for Invoicing' section to add a new bank account:

Business Legal Entity successfully created. Next, you must add payment info or a Remit-to address required for invoicing. Go to Payment Methods and click 'Add Payment Method' to complete this.

Close   Continue

Continue   **6**

Payment Methods

Payment Method → Add Payment Method

7   Bank Transfer → Bank Transfer

Virtual Card   Payment Method Name
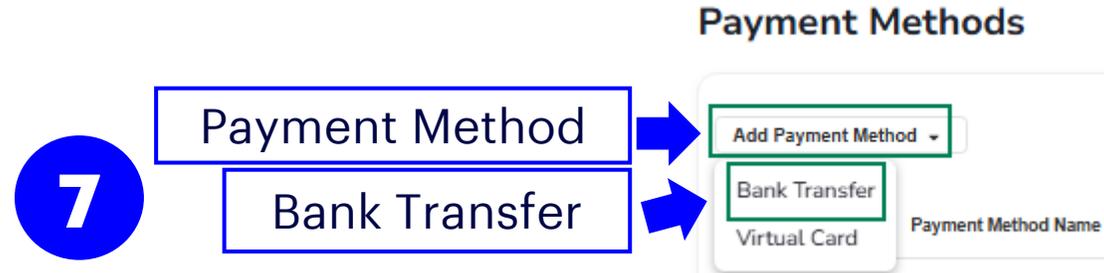
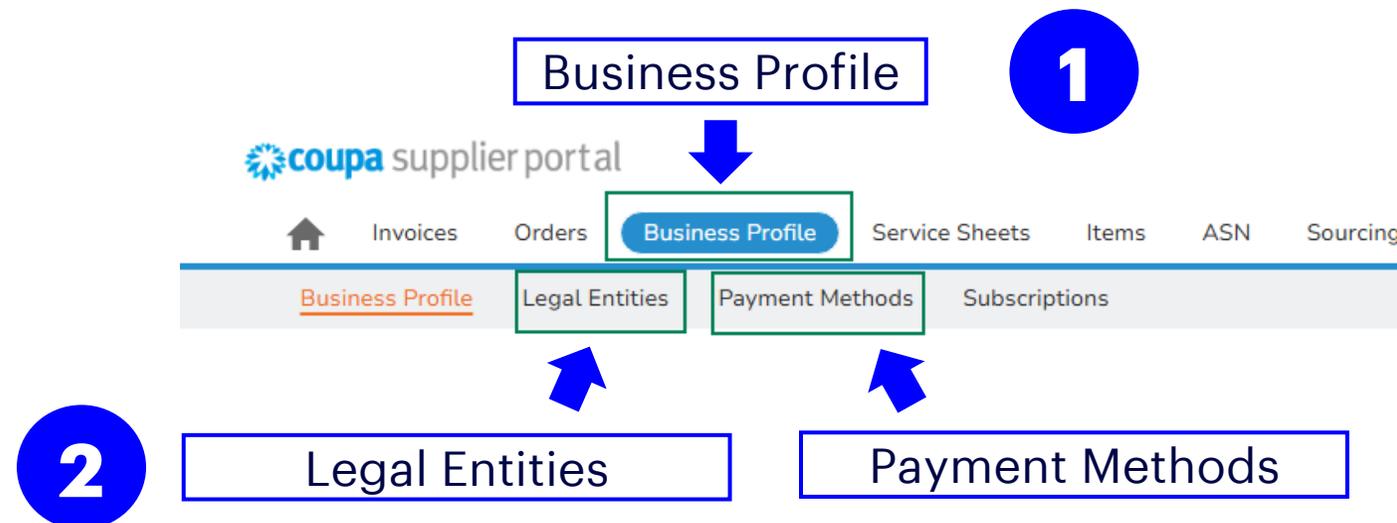# 03.d. Multifactor Authentication (MFA) Activation and Use (1/4)

In the Coupa Supplier Portal (CSP), **MFA (Multi-Factor Authentication)** is a security feature that enhances account protection by requiring users to verify their identity using more than just a password.
It will be **required each time you access the *Legal Entities* or *Payment Methods*** sub-tab in the **Business Profile** tab, to make payment information-related changes.

How to enable MFA
❑ Go to the **Business Profile** tab and click on **Legal Entities** or **Payment Methods**.

❑ You will be asked to enable Multi-Factor Authentication. This is a mandatory step. Click on "**Enable**":

Authentication Required

Multi Factor Authentication needs to be enabled before you can access this feature.

Enable

3

Enable

❑ Scan the QR code with your Multi-Factor Authentication app (e.g. Google Authenticator, Microsoft Authenticator etc.)

❑ Enter the 6-digit verification code received on your mobile device from the MFA app and click **Enable**.

❑ If you don't have an MFA app, download it on your mobile device from Play Store/App Store.

Multi Factor Authentication via App

① Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. Learn more
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal

4

QR code

XMYQEG2ERFKSYH6IHHQ3LTF6
S25TYZR5

Click to copy Security Key

5 **6-digit code**

② Enter the 6-digit verification code from your device.

278714

6

Cancel   Enable

Enable

The system will then provide some emergency recovery codes which:

- ❑ You can use to **restore access to the CSP** in the cases indicated in the screenshot.

- ❑ You should **keep safe** in case you need them and once you save them, close this window.

7

Save Your Backup Codes ✕

These codes were generated on March 05, 2025

Emergency Recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

DCm1WA	yEj4Ig
gtrt7g	HFHf6A
jtp_6g	IfWchw

Copy　Download　Print

03.d. Multifactor Authentication (MFA) Activation and Use (4/4)

You now have access to the **Legal Entities** and **Payment Methods** sub-tabs

Upon every subsequent login to your account and attempt to access the **Legal Entities** or **Payment Methods**, the system will require you to enter the MFA code from your Authenticator app:

8

MFA code