

Coupa Account Administration and Navigation



Suppliers – New and Existing

Medline Industries, LP has chosen Coupa as their platform for Supplier Onboarding, Supplier Record Maintenance and Purchasing for Indirect Spend. For all suppliers, this guide will outline the onboarding process from the supplier perspective and highlight ways to navigate through Coupa to ensure the supplier has a complete profile to be paid correctly and efficiently. Additionally, for Indirect Spend (i.e. goods/services NOT used to produce Medline products or for distribution), the Coupa Portal can be used for direct access to Purchase Orders, Invoices and payments.

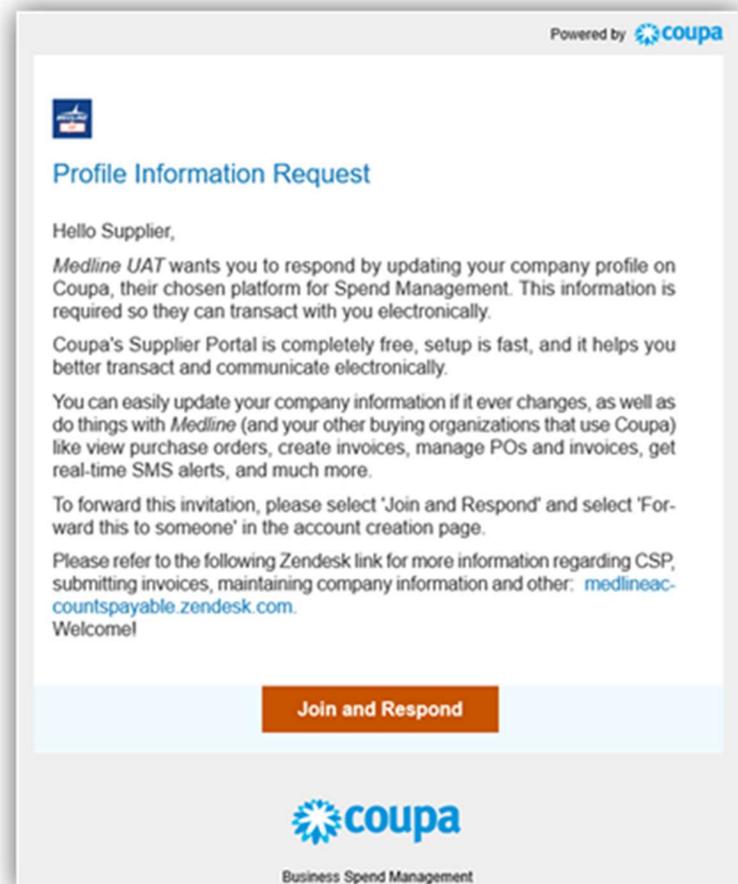
New to Medline Suppliers

A Medline Business partner must initiate a request to set up a new supplier in Coupa. The request must be approved by the necessary groups for an invitation to be sent to the supplier to start the onboarding process.

- Sender: do_not_reply@medline.coupahost.com
- Subject: Profile Information Request
- Join and Respond
 - o If someone else needs to complete the onboarding process, select “Forward this to someone” at the bottom of the form

Create an Account

- By creating an account, you can come back to the form to complete onboarding later as well as log in to make future updates to your supplier record (banking, contacts, address, etc).



Create an Account

Medline UAT is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Medline UAT 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** *** Tax 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](#)

Create an Account (continued)

Enter in Tax ID or Social Security # (if applicable)

- Check the box if you do not have a Tax ID and you will be required to enter justification

Accept the Privacy Policy and Terms of Use before clicking on Create an Account

You will be required to enter a Verification Code that is sent to your email to proceed.

OTP sent successfully via email

[Back](#)

Email Verification

We sent a one time verification code to jgube2@gmail.com

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

Next

Confirm/ Enter in your primary address before moving to Payment options. If you do not accept any of the payment options presented, check the box at the bottom of the screen and select NEXT:

- Virtual Credit Card
- Bank Transfer
- Check

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** *** Address Line 1** **Address Line 2**

*** City** *** State** *** Postal Code**

Next

Virtual Card Payments are sent to an Email Address of the supplier's choice. The email will contain the Payment Method Name (Payee), the 16-digit virtual card number, expiration date and security code. The payment will need to be applied by the supplier to their payment system. Note: payments by virtual card are subject to fees charged by the supplier's terminal provider

The screenshot shows the 'Coupa Supplier Portal Onboarding' interface. At the top, a green banner indicates 'Primary Address saved successfully'. Below this, there are two tabs: 'Account Details' and 'Payment Information', with the latter being selected. The main content area is titled 'Virtual Card' and includes a 'Customer Supported' badge. It instructs the user to enter information to receive Virtual Card payments. There are two required fields: 'Payment Method Name' and 'Email Address'. At the bottom, there is a checkbox labeled 'Do not accept Virtual Card payments from this customer' and a blue 'Next' button.

**If you do not accept Virtual Card payments, check the box and select NEXT. The next option is Bank Transfer

Bank Transfers require the supplier to validate the banking information through our partners, NSKnox. After the supplier fills the information on the Bank Transfer form, the information is sent to NSKnox. The primary contact is sent an email from Medline saying NSKnox is validating the banking information, and a link is provided to check the progress. If the supplier has not previously validated their account through NSKnox, they will be required to add additional information through the NSKnox link and potentially receive and return a micro-deposit for validating the account.

NSKNOX Registration is required for ACH and Wire payments. If payment method bank transfer is chosen, there will be an email with the subject line "(PRD) Information required to complete the validation process". Within the body of the message will be a link to register for NSKNOX. Once you go to the link hit "get started". * Below is the email you will receive*

Welcome to Medline Industries, LP, vendor bank validation process.

Our partner, **nsKnox**, conducts bank account validation.

Please use the registration link below to provide **NsKnox** with additional banking information as part of the validation process. [RegistrationLink](#)

Registration

Enter your company details that you have provided to the payer

- Company
 Individual

Company country

Company info

Company name Tax ID type

Tax ID number Company website (Optional)

Address

Address country Company address

City Zip / Postcode

Contact info

First name Last name

+1 Phone number Email address

CONTINUE

After registering with NSKNOX you will receive an email confirming registration. If you do not have a NSKNOXID they will send you a micro deposit and you will be given instruction on returning the deposit to NSKNOX. The return payment must be from the same account you registered with to complete the account validation.

Standard Account Validation

Thank you for registering. To complete the validation of your account, please make a one time transfer of USD \$10 or equivalent in the currency you expect to receive your payments.

Payment instructions

Do not use ACH
Only wire transfer (SWIFT)

Beneficiary name	nsKnox Technologies, Inc
Address	135 Madison Ave, New York, NY 10016
Account number	466007904549
Swift code	BOFAUS3N (US Dollar Wires) BOFAUS6S (Foreign Currency Wires)
ABA Fedwire	026009593
Bank name and address	Bank of America, 222 Broadway, New York, NY 10038

Once NSKNOX receives the returned payment they will review all the account information and, if everything is matches the validation will be complete. For any issues or questions please refer to the FAQ page at the bottom of the registration link page or email accountvalidation@nsknox.net (be sure to include the name of the company and account validation in the subject line).

> Easy 2-Step Process

Step 1

Enter your company and account information



Step 2

Follow specific instructions to complete validation

GET STARTED

An explainer video detailing the process



[Frequently asked questions](#)

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 Account Country/Region

United States ▼

* State

* Bank Account Currency

USD ▼

Beneficiary Name

Bank Name

Account Number ⓘ

Confirm Account Number

ACH Routing Number ⓘ

Wire Routing Number ⓘ

My company expects to receive urgent/wire 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

**If you do not accept Bank Transfer payments, check the box and select NEXT. The next option is Check

Check payments require the supplier to enter the physical address. This may be different than the address listed as the primary address. Additional remit to addresses can also be added later

Coupa Supplier Portal Onboarding

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

Account Details Payment Information

Check

Customer Supported

Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region

* Street 1

Street 2

+ Street 3

* City

* State

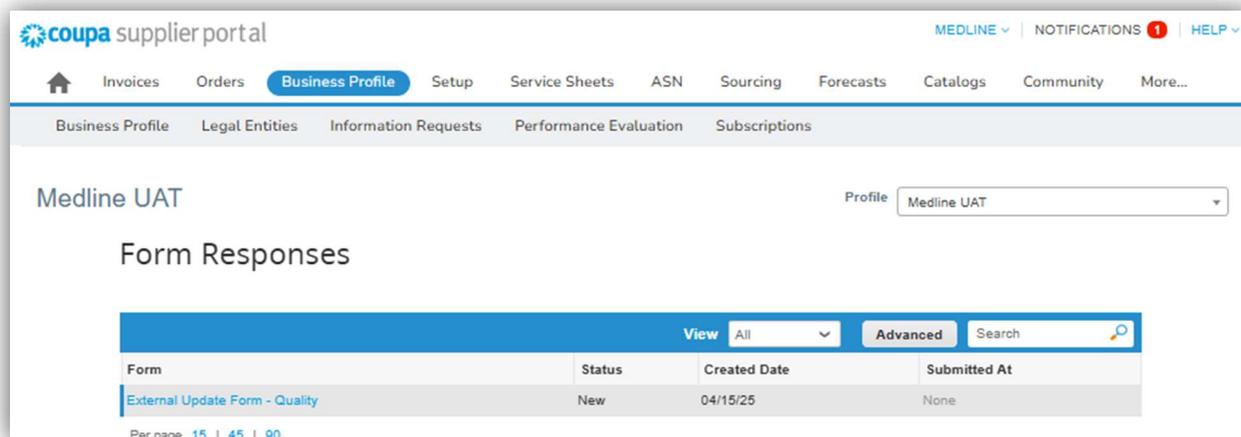
* Zip Code

Remit-To Code ⓘ

Do not accept Check payments from this customer

Next

At any point, the supplier may come back to their profile to finish their setup. The supplier can get back to the form by logging in, selecting Business Profile and clicking on Information Requests. Click on the form and all the applicable fields will appear.



To ensure the appropriate Medline approval teams and conditional questions appear, select NEW:

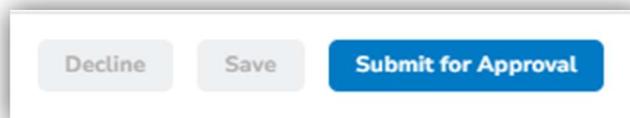
* Are you setting up a new vendor record, or updating an existing record?

New

Existing

Ensure to include all supporting documentation (w9/w8, quality, COI, ETC...) where required.

Once the form is completed, select Submit for approval



If all sections are filled in correctly, you will get the message below and the status will change to PENDING APPROVAL. Otherwise, any errors will highlight in RED:



Existing Medline Suppliers

An Existing Medline supplier may be sent a request to Join the Coupa Supplier Portal AND Update their Supplier Information Profile in Coupa, also known as SIM. The requests will include the same profile fields as a New Supplier Request.

In some cases, depending on the initial setup, a brand-new supplier may receive the invitation via email like the example to the right (select NEW when asked *Are you setting up a new vendor record, or updating an existing record?)

Join the Coupa Supplier Portal

- Sender: do_not_reply@medline.coupahost.com
- Subject: Action Required - Medline Registration Instructions
- Click on: Join Coupa Supplier Portal
 - o If someone else needs to complete the onboarding process, select "Forward Invitation"
- Create an Account
Same as the above: Enter Account Details and Payment Information

Update the profile

- Sender: do_not_reply@medline.coupahost.com
- Subject: Update your profile for Medline Industries, LP
- Click on: Log In
- Information Requests Form will open immediately
- The supplier can get back to the form by logging in, selecting Business Profile and clicking on Information Requests.

The screenshot shows an email from Medline UAT, powered by Coupa. The subject is "Action Required - Medline UAT Registration Instructions". The email is addressed to THOMAS. It states that all business spend is handled electronically and that the recipient has 48 hours to register their account. It provides the email address supplier@coupa.com for assistance. At the bottom, there are two buttons: "Join Coupa Supplier Portal" (highlighted in blue) and "Forward Invitation". The footer includes the Coupa logo and "Business Spend Management".

The screenshot shows an email from Medline UAT, powered by Coupa. The subject is "Update your profile for Medline UAT". The email is addressed to THOMAS. It states that Medline UAT has requested the recipient to provide company information for electronic transactions. It instructs the recipient to use the "Log In" button to respond or decline. At the bottom, there is a blue "Log In" button. The footer includes the Coupa logo.

Homepage Navigation

The screenshot shows the Coupa Supplier Portal homepage. At the top left is the 'coupa supplier portal' logo. On the top right, there are links for 'MEDLINE', 'NOTIFICATIONS' (with a red badge '1'), and 'HELP'. Below the logo is a navigation bar with icons and labels for 'Invoices', 'Orders', 'Business Profile', 'Payments', 'Setup', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', and 'More...'. A red circle with the number '8' is placed over the 'More...' link. Below the navigation bar is a teal banner with the text 'Verify Your Account And Get Noticed' and a 'Get Verified' button. A red circle with the number '9' is placed over the 'Get Verified' button. Below the banner is a profile card for 'MS Medline Supplier test' with a 'Get Verified' button. Below the profile card is a 'Recent Activity' section with a red circle with the number '7' over the title. It shows two 'Information Request' items from 'Medline UAT' with dates 'Apr 15'. To the right of the 'Recent Activity' section is an 'Announcements' section with the text 'No Announcements'. At the bottom of the page is a summary section with four cards: 'Multi Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection).

- 1) Home Page Icon – Navigates to Home Page from any page in Coupa
- 2) Invoices – Displays insights (reports) per the Supplier and any linked Suppliers as well as allows the supplier to create invoices to send directly to Medline Industries, LP
- 3) Orders– Displays insights (reports) per the Supplier and any linked Suppliers as well as allows the supplier to create invoices from the POs to send directly to Medline Industries, LP
- 4) Business Profile – Supplier direct access to updating their company information, contacts, addresses, etc. Any form requests from Medline to the supplier to complete their profile will be under the Information Requests tab.
- 5) Payments – Displays payments related directly to Coupa Invoices and Purchase Orders
- 6) Setup – Supplier direct access to their administrative settings: Users, Merge requests, Payment Methods, etc.

- 7) Recent Activity – The Supplier Dashboard is great for an overview but use the tabs along the top for any action
 - 8) Notifications – Notification alerts (recent activity)
 - 9) Supplier Name/Initials – Another shortcut to Supplier Business Profile. Supplier uses the pencil icons to make changes where necessary.
- **PO EMAIL** – Ensures supplier receives Coupa generated Purchase Orders immediately. The wrong contact can cause delays

PO Email

- **PRIMARY CONTACT** – A supplier can only have one primary contact. This contact will receive all information requests. User access can be edited from the pencil icon. Additional users can also be added.

Contacts					
Name	Primary Contact	Email	Work Number	Purpose	Actions
Medline Test	Yes	jgube2@gmail.com		Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	

Receiving Purchase Orders

Suppliers can choose how to receive purchase orders:

- PO Email
 - o Sender: do_not_reply@medline.coupahost.com
 - o Subject: New Purchase Order ### has been issued
 - o Ability to click to View Order in the Coupa Supplier Portal
 - o Supplier can manually reference the PO # on the invoice if not flipping invoices from the CSP
- CSP (Coupa Supplier Portal)
- cXML : Supplier must work with the Medline Procurement team by creating a Coupa Question/ Issues Ticket
 - o <https://medlineaccountspayable.zendesk.com/>
 - o Coupa Question/ Issues – [General Supplier Enablement Help](#)

Example: Purchase Order sent via PO EMAIL

Powered by  coupa



Medline UAT Purchase Order #413

Hi Thomas,

This is to inform you Purchase Order 413 from Medline UAT has been issued, and this same notification has been sent to your fellow team members with access to the Coupa Supplier Portal.

Submitted By Jessi Gube
On Behalf Of Jessi Gube
Supplier 161498-Test1
Total **1,000.00** USD
Items **Test PO** **1,000.00** USD

[View Order](#)

More Detail

PO ID	413	Department	None
Status	Issued - Pending Manual	Last Opened	None
Order Date	04/16/25	Acknowledged At	None
Revision Date	04/16/25	Payment Term	WT00 Payable immediately Due net
Req #	646	Shipping	EXW

Supplier

161498-Test1 NO 225 TUNCUN RD WUJIANG ECONOMIC AND DEVELOPEM
201701 SUZHOU Guangdong
China jgube@medline.com +1 (650) 555-1212

Shipping

3 Lakes Dr
Northfield, IL 60031
United States
Attn: Jessi Gube

Lines

Test PO for 1,000.00 USD
Supplier **161498-Test1** • Commodity **Office Supplies** • Account **K-93500-93500-535140**

Total 1,000.00 USD



Total Spend Management - Make Margins Multiply

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

Example: Purchase Order via Coupa Supplier Portal (CSP)

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Invoice from a Purchase Order

Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
413	04/16/25	Issued	None	Test PO	No	1,000.00 USD		 



Gold Coins: Create an invoice directly in Coupa for the corresponding PO



Red Coins: Create a credit directly in Coupa for the corresponding PO

Click on the PO Number to Acknowledge the PO, add Shipment Tracking, comments and more. From here, the supplier can also create an invoice and print the PO.

Purchase Order #413

General Info

Status Issued - Pending Manual
Order Date 04/16/25
Revision Date 04/16/25
Requester Jessi Gube
Email JGube@medline.com
Payment Term WT00 Payable immediately Due net.
Attachments None
Acknowledged 
Assigned to

Shipping

Ship-To Address 3 Lakes Dr.
Northfield, IL 60031
United States
Attn: Jessi Gube
Terms EXW



Shipment Tracking



No shipment tracking.

Lines

Type	Item	Price	Total	Invoiced
	Test PO	1,000.00	1,000.00	0.00

Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number
None	None	None	None

Per page 15 | 45 | 90

Total USD 1,000.00

Create Invoice Save Print View

0 Comments Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

History

Creating Invoices

Suppliers can choose how to send/create invoices:

VIA EMAIL

- **Non-PO backed invoices:** send to NPOInvoices@medline.com
 - o Include an INVOICE OWNER to ensure the invoice is routed appropriately. Failure to include an invoice owner on the invoice will cause delays in processing and payment.
- **PO back invoices:** send to SupplyInvoices@medline.com
 - o Include the Coupa PO # on the invoice copy to ensure the invoice is applied to the correct PO. Failure to include the PO # on the invoice will cause delays in processing and payment.

VIA COUPA SUPPLIER PORTAL

- **Non-PO backed invoices:** Supplier goes to the Invoices Tab
 - o From the Invoice page, click on Create Blank Invoice
- **PO backed invoices:** Supplier goes to the Orders Tab
 - o From the Purchase Order page, click on the Gold Coins or click on the PO # and click on Create Invoice

Example: Invoice via Coupa Supplier Portal (CSP)

Non-PO Backed

- The TO and LINES will be blank since there is not information to pull in from an existing PO
- If the supplier is unable to Create Blank Invoices, they can request access to allow “Created Invoices Without Backing Document”

PO Backed

- All pertinent information from the PO will be pulled in
- The General Info for the Invoice will need to be manually populated.

After submitting

- The supplier will be notified if the invoice was approved or placed on hold
- On Hold- if there are any discrepancies between the PO and the Invoice and Medline needs to review
- Approved- 3-way match (PO backed) or Approval workflow complete (Non-PO backed) and payment is staged.
- If Supplier is linked to the CSP, they can see corresponding payment information

Create Invoice Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold. ✕

General Info

Invoice #

Invoice Date

Payment Term WTO0 Payable immediately Due net

Currency

Status Draft

Shipping Term

Image Scan No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

Discount Amount

From

Supplier 161498-Test1

Supplier Tax ID

Invoice From Address 161498-Test1
NO 225 TUNCUN RD WUJIANG
ECONOMIC AND DEVELOPEM
SUZHOU, Guangdong 201701
United States

Remit-To Address No address selected

Ship From Address 161498-Test1
NO 225 TUNCUN RD WUJIANG
ECONOMIC AND DEVELOPEM
SUZHOU, Guangdong 201701
United States

To

Customer Medline UAT

Bill To Address Medline Industries LP
Attn Accounts Payable
Three Lakes Drive
Northfield, IL 60093
United States

Ship to Address 3 Lakes Dr
Northfield, IL 60031
United States

Payment Block None

Direct Invoice No

Lines ☐ Line Level Taxation

Type	Description	Price	
	<input type="text" value="Test PO"/>	<input type="text" value="1,000.00"/>	1,000.00 ✕
PO Line 413-1	Service Sheet Line None	Contract <input type="text"/>	Credit Line None
Supplier Part Number	Direct PO Line Info	Billing K-93500-93500-535140	

[+ Add Line](#) [+ Pick lines from Contract](#)

Totals & Taxes

Lines Net Total	1,000.00
Shipping	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	1,000.00
Total	1,000.00