

How to Access the Coupa Supplier Portal

Purpose:

The purpose of this help guide is to provide instruction for accessing the CBRE Coupa Supplier Portal. The Portal is used to initiate onboarding and risk assessment as a new supplier to CBRE.

Scope:

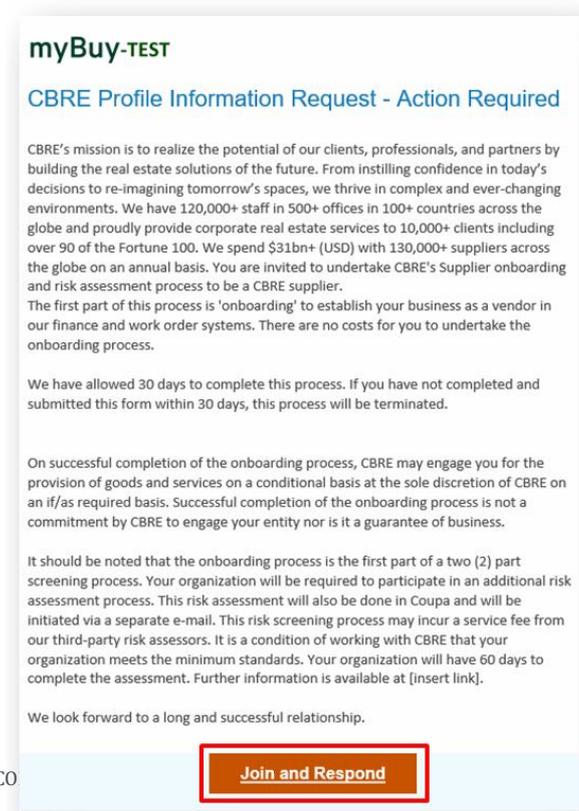
- How to access the CBRE Coupa Supplier Portal for the first time
- How to access the portal if you already have an existing Coupa account
- Forwarding the invite to the right person
- What to do if the invite expired

How to access the CBRE Coupa Supplier Portal for the first time:

The Coupa Supplier Portal (CSP) is CBRE’s New Supplier Onboarding and Risk Assessment tool. All CBRE suppliers are required to register with Coupa to complete Onboarding and Risk Assessment forms. Creating a Coupa account is completely free of charge. There is **no need** to sign up for the enhanced Coupa version which comes with an additional cost.

When you are about to enter into a business relationship with CBRE, your Relationship Manager will initiate a New Supplier Onboarding Request in Coupa. Once this has been approved internally, you will receive a system generated email from

do_not_reply@cbre.coupahost.com with the subject "**CBRE's New Supplier Request**" inviting you to complete your onboarding questionnaire. You then have 30 days to submit your response.



After clicking **“Join and Respond”** the Coupa Supplier Portal will display the Login/ Create an Account screen. Simply complete the required fields and click **“Create an Account”**.

coupa supplier portal

Create an Account

We use Coupa to manage purchase orders, invoices, and communicate with our suppliers. We'll walk you through a quick and easy setup for your account, so we're ready to do business together.

Business Name
Franklin Music
Your legal business name (or legal personal name if an individual)

Email
mybuysupp+051109202023@gmail.com

First Name Edward **Last Name** Bollinger

Password **Confirm Password**

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

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

Create an Account

Already have an account? [LOG IN](#)
[Forward this to someone](#)

After the initial log in screen, an onboarding sequence will appear requesting details about your company. Please complete these as outlined below.

Your Contact Information: This should be the details of the Account Manager who will be the primary point of contact for CBRE. Please complete and click **“Next”**.

myBuy-TEST Your Contact Information

First Name Edward **Last Name** Bollinger

Phone Number

Country/Region

Address

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

Next

[Skip for Now](#)

Confirm Invoice-From Location and click **“Next”**.

The screenshot shows a web form titled "Confirm Invoice-From Location" within the myBuy-TEST interface. The form includes the following fields and options:

- Country/Region:** A dropdown menu with "United States" selected.
- Address:** A text input field containing "1474 Selah Way".
- City:** A text input field containing "Brattleboro".
- State:** An empty text input field.
- Postal Code:** A text input field containing "05301".
- Advanced Invoicing:** A section with an "Invoice-From Code" text input field and a note: "Recommended if you plan to use with CBRE in integration for invoicing (cXML, or SFTP)."
- Preferred Invoicing Language:** A dropdown menu with "English (US)" selected.
- Tax Country/Region:** A dropdown menu with "United States" selected.
- Tax ID:** A text input field with an information icon.
- I don't have Tax ID Number
- [+ Additional Tax ID](#)

A blue "Next" button is located at the bottom of the form.

Tell Us About Your Business: Please complete your website address and Tax ID and click “Next”.

The screenshot shows a web form titled "Tell Us About Your Business" within the myBuy-TEST interface. The form includes the following fields and options:

- Business Website:** A text input field.
- I do not have a website
- Tax ID (or Local ID):** A text input field with a lock icon.
- Text: "Tax ID is to confirm you are a real business. Individuals may use your Social Security number."
- I do not have a Tax ID
- DUNS Number:** A text input field with a lock icon.
- Text: "Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses."

A blue "Next" button is located at the bottom of the form, with a "Skip for Now" link below it.

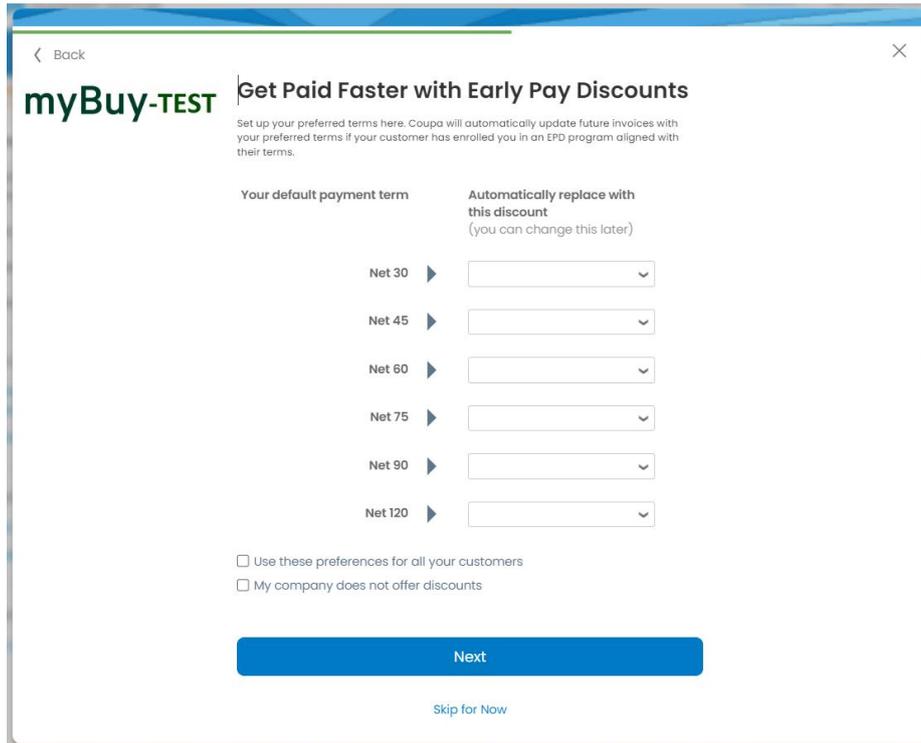
Confirm Pay-To Location (Remit-To): This should be the address that purchase orders will be addressed to. Please complete and click “Next”.

The screenshot shows a web form titled "myBuy-TEST Confirm Pay-To Location (Remit-To)". The form includes a "Back" link, a close button, and a dropdown menu for "Add New Pay-To Location". It features required fields for "Country/Region" (set to "United States"), "Address", "City", "State", and "Postal Code". There is also an "Advanced Invoicing" section with a "Pay-To (Remit-To) Code" field. A blue "Next" button is at the bottom.

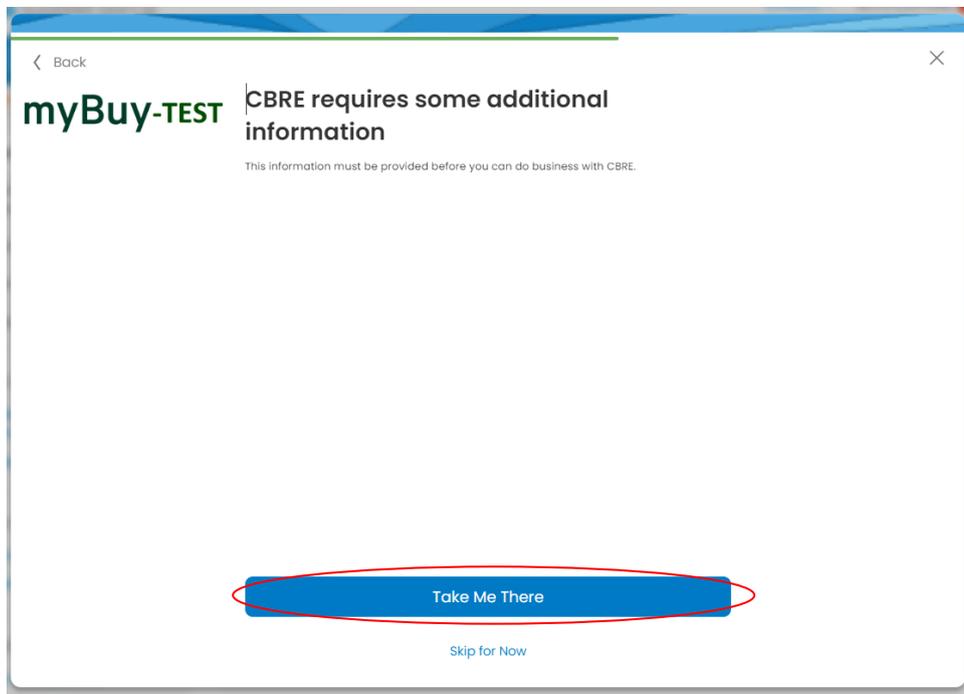
Confirm Ship-From Location: This should be the address of your main office. Please complete and click **“Next”**.

The screenshot shows a web form titled "myBuy-TEST Confirm Ship-From Location". The form includes a "Back" link, a close button, and a dropdown menu for "Add New Ship-From Location". It features required fields for "Country/Region" (set to "United States"), "Address", "City", "State", and "Postal Code". There is also an "Advanced Invoicing" section with a "Ship-From Code" field. A blue "Next" button is at the bottom.

Get Paid Faster with Early Pay Discounts: CBRE does not accept dynamic discounts specified on this page. Please click **“Skip for Now”**.

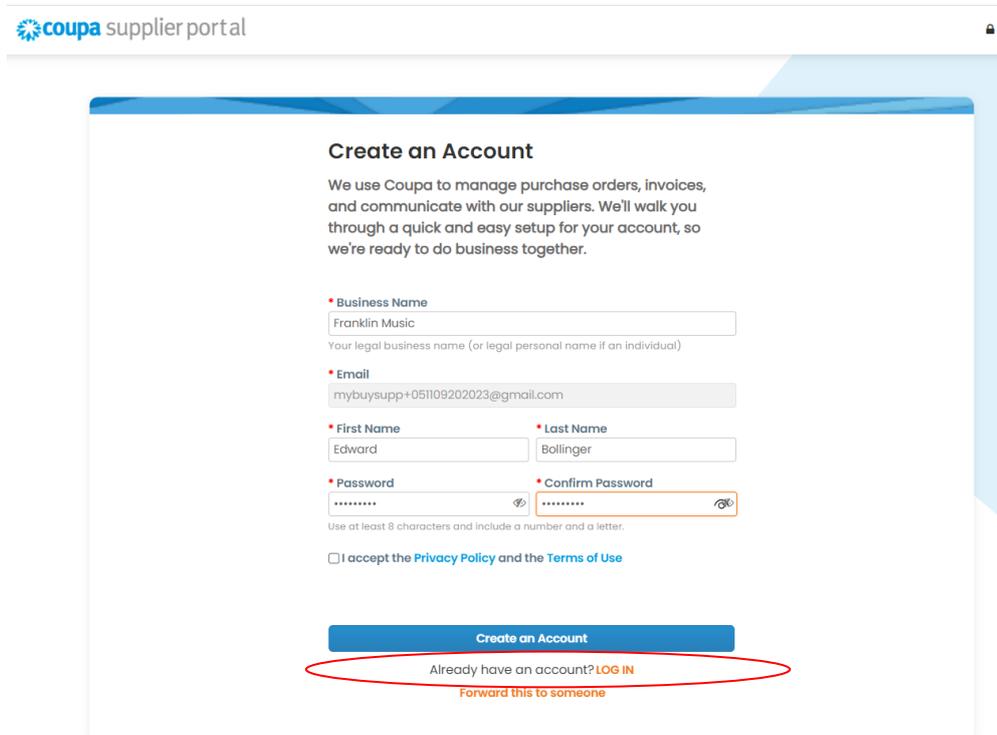


On the final Coupa Supplier Portal (CSP) screen the “**CBRE requires some additional information**” screen. You will see a button that says, “**Take Me There**”, selecting this will take you directly to the New Supplier Onboarding Form. If you select “Skip for Now” on this screen, you will be taken back to the CSP homepage.



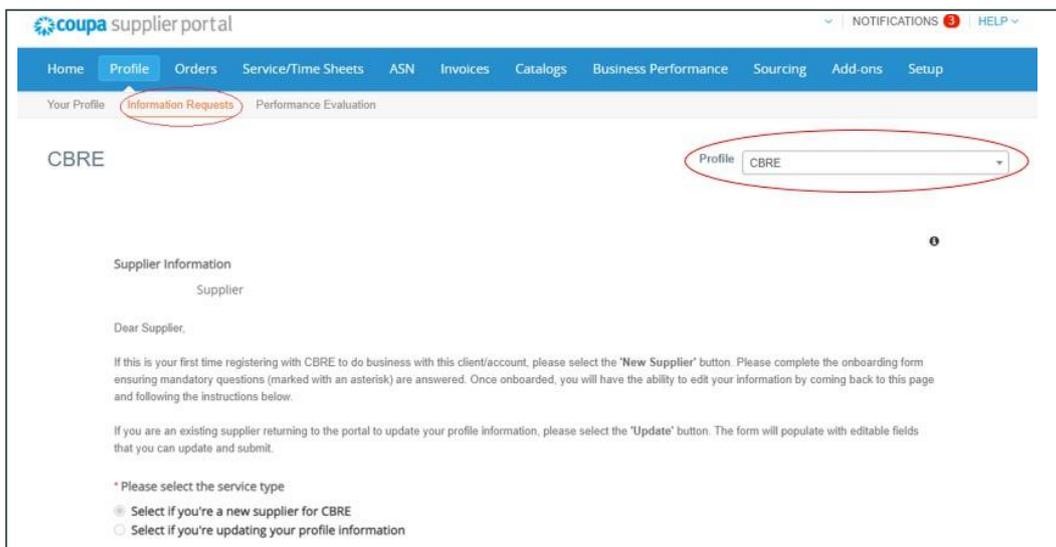
How to access the portal if you already have an existing Coupa account

If you already have an existing Coupa account, on the Create an Account page below the blue Create an Account bar you will see “**Already have an account? LOG IN.**” Click on “Log in” and enter your Coupa credentials and your Coupa supplier dashboard will open.



Once you logged in you can access the New Supplier Onboarding Form directly from your profile.

From your profile click on > **Information Requests**. Then select ‘**CBRE**’ from the profile drop down menu. Any pending Information Requests will appear on the page.



What if the invite did not go to the right person?

At the bottom of the “Create Account” page, select “**Forward this to someone**”. You can forward the invitation to any colleague that shares the same email domain. The recipient will then have access to view and complete the requested form(s).

The screenshot shows the 'Create an Account' page in the Coupa Supplier Portal. The page has a blue header with the Coupa logo and 'supplier portal' text. The main content area is titled 'Create an Account' and contains a form with the following fields:

- Business Name:** Franklin Music (with a note: 'Your legal business name (or legal personal name if an individual)')
- Email:** mybuysupp+051109202023@gmail.com
- First Name:** Edward
- Last Name:** Bollinger
- Password:** [Redacted]
- Confirm Password:** [Redacted]

Below the form is a checkbox labeled 'I accept the Privacy Policy and the Terms of Use'. A blue button labeled 'Create an Account' is positioned below the checkbox. At the bottom of the form, there are two links: 'Already have an account? LOG IN' and 'Forward this to someone'. The 'Forward this to someone' link is circled in red.

What to do if the invite expired:

Invitations to onboard **expire after 30 days**. If you try to create a CSP account or access the form after 30 days, the Registration / Login page will display a red message bar stating, "Your invitation has expired". In this case you must reach out to your main CBRE contact (usually the Requester) or SupplierRisk@cbre.com and ask that the invitation be resent.

Additional Materials and Support

For more helpful hints and tips and help guides on how to use Supplier Shield please visit the training section on the Supplier Shield Internet page [here](#).