

Completing New Supplier Onboarding

For new suppliers, interested in doing business with Lifespace.

LIFESPACE
COMMUNITIES®



Step 1: Lifespace Completes New Supplier Request

Team member
initiates SIM-1
Request New
Supplier

Team member
completes all fields
and submits for
approval

SIM-1 Form

Request a new supplier

Information entered:

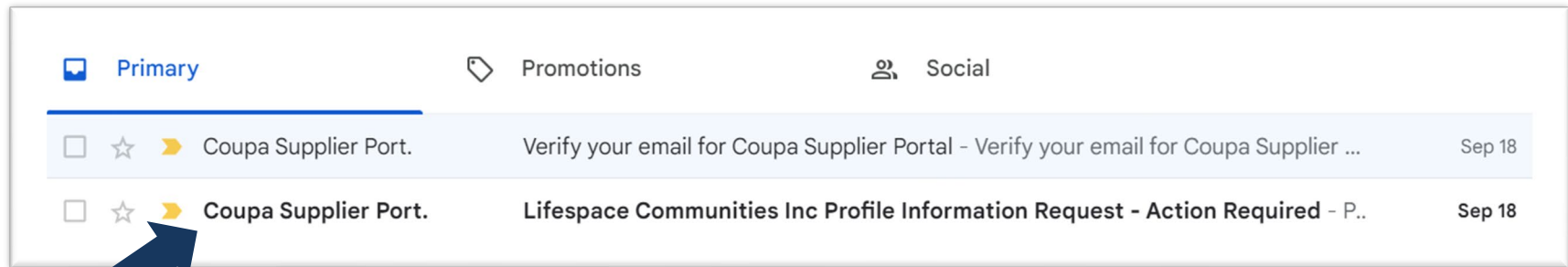
- Full name, email address, phone number
- Once submitted, and approved internally, you as the supplier will receive an email

REMINDER: Supplier Requirements to Do Business with Lifespace:

- Be willing to interact via email
- Be willing to be paid by virtual credit card, ACH, or digital check
- If you are willing to use the Coupa Supplier Portal (CSP) that is a bonus

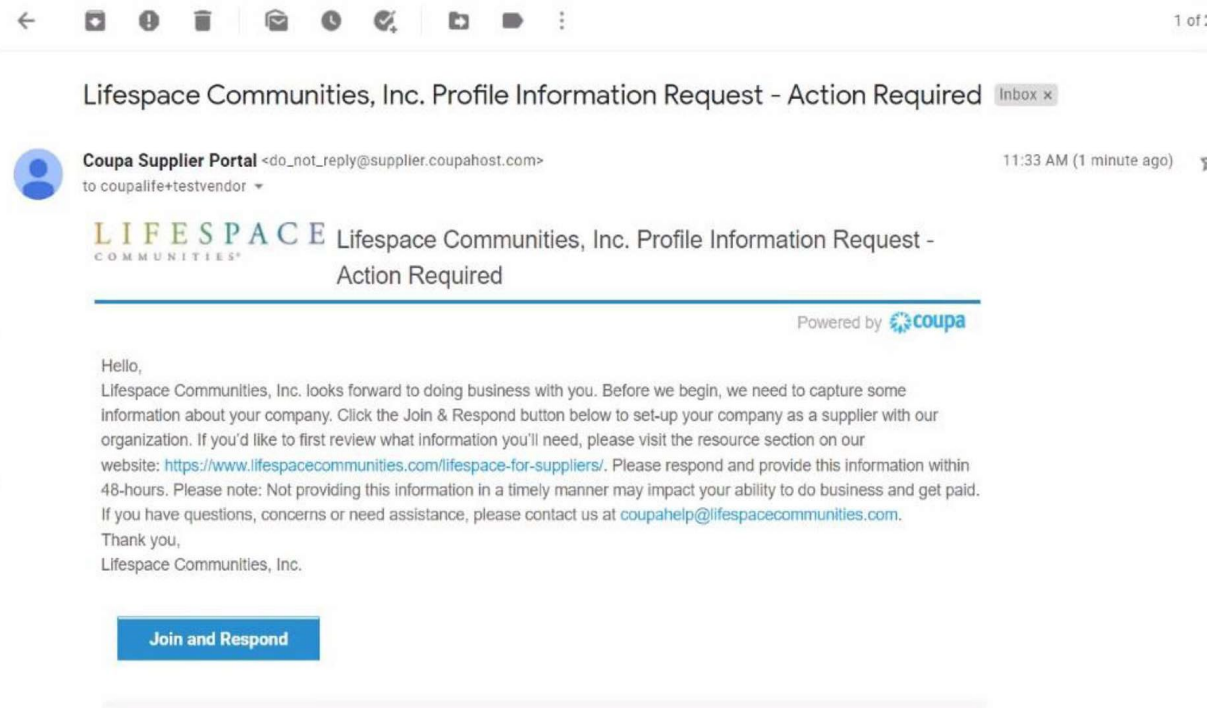
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Step 2: Supplier Receives Email Invitation



You will receive an email from Coupa Supplier Portal

Please note, you will receive this email after all internal approvals have gone through. Typical 48 business hours after the Lifespace team member submits Step 1.



Step 3: Activate Your Coupa Account

Create an Account

Grow your Business on Coupa with a Free Account

* 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.

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

Create an Account

Already have an account? [LOG IN](#)

- After clicking “Join and Respond”, your browser will open another tab and you’ll be prompted to “Activate your Coupa account”
 - In order to complete the Supplier Onboarding form, you **must** activate your account, even if you do not plan on using the Coupa Supplier Portal to interact with Litespace.
- Starting here, enter your Supplier Information (NOTE: Do not enter the same information seen in screenshots)

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Step 4: Begin SIM Form 2

The screenshot displays the Coupa Supplier Portal interface for Lifespace Communities Inc. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, and Business Performance. Below this, there are sub-links for Sourcing, Add-ons, and Setup. The main content area shows the user's profile information, including a dropdown menu for the profile name. A yellow notification banner indicates that some information has been auto-filled from the user's public profile. The central focus is the 'Supplier Onboarding Form' section, where 'SIM Form 2' is highlighted with a blue circle. At the bottom, there is a link to visit the Lifespace Communities Supplier website and a 'Chat with Coupa Support' button.

- Once you activate your account, you will be brought to this screen SIM Form 2.
- There are multiple fields to fill in on this form.

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Step 5: Legal Name, Display Name & Contact Info

Basic Information

* Legal Name of Supplier ←
Please be sure this matches your W9

Display Name ←
Doing Business As or Trade Name

* Primary Contact

Supplier Contact Information

* First Name

* Last Name

* Email address ⓘ

* Work Phone +1 (123) 456-7890
650-555-1212

Mobile Phone
650-555-1212

Fax
650-555-1212

Contact Purpose ⓘ

Enter your legal business name

Display name can be a DBA if you have one. If you enter nothing, this will be auto-filled with your legal name.

The contact information field may already be pre-filled. Double check that information is correct and/or fill in any missing information.

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Step 6: Primary Address & PO Email

* Supplier Primary Address

Address Purpose 

* Region

Country/Region

State Region

Address Name

* Street Address

Street Address 2

* City

* Postal Code

Location Code

This address is your primary business address. You will be asked to also create a REMIT address later in this form, payment account.

* PO Email 

Our preferred method to send purchase orders to suppliers is via email. If you aren't 6686 or AP@Lifespacecommunities.com

Continue scrolling and enter the primary address for your business.

Please be sure to complete every field with a star.

You will also fill in the email address for us to transmit Purchase Orders (PO) to. This is necessary for us to do business with you. We will email you the PO, so you know you have a real commitment from us for your goods or services. This will be pre-filled with the contact email from the form. Change it if you want POs going to a different email address.

Step 7: Add Tax Information

Tax Information

* Tax Region

* Tax Classification

* Tax Registrations

Use this section to add all your applicable tax registrations.

Add Tax Registration

* Tax Registration

Country

Tax ID

Local

* Federal Tax Form (W9)

* Type

* Attachments [Add](#) [File](#)

- After completing your primary address and entering your PO email address, you will need to add your tax information.
- **Please click on “Add Tax Registration” and add Country and Tax ID**
- **These fields are all required for us to do business with you.** If you are an independent contractor, your SSN# may be your tax-ID. You must also provide us your W9. If you are not familiar with what a W9 is, you can find more info at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

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Step 8: Remit-To Address

Remit-To Information

This is the section for your REMIT and payment information. Please complete this section, even if your REMIT address is the same as your primary business address. Once you fill in the REMIT address information, the form will then ask you to establish your digital payment account with us. That can be credit card or ACH. If you select credit card you must already be setup to accept credit card payments (Lifespace will not pay any fees associated with credit card transactions). If you select ACH, that will be a transfer of funds from our bank to yours (please be sure to fill in every field). If this section is not completed, we will not be able to establish a business relationship with you.

Remit-To Addresses:

- This is an important step in the form and will affect our ability to pay you. **Please click the “Add Remit-To” button to add your business address and payment account.**
- **If you do not complete this step, you will not be able to complete the form or do business with Lifespace.**

*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



DO NOT SKIP THIS STEP

Copy of Voided Check
or Bank Letter with
account and routing
number

Choose File No file chosen

Step 8: Remit-To Address

How would you like to be paid?

All Methods Bank Transfers Checks Credit Cards 

Lifespace Communities Inc supports Bank Transfers Payments.

You will be asked to select a payment method. Please choose either ACH or credit card. These are our preferred payment methods. Select Add Payment Method.

Step 8a: Remit-To – Entity Name & Country

Where's your business located? ×

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Where's your business located? (Required fields)

- Enter your legal entity name
- Enter your country
- Click continue

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Step 8b: Two-Factor Authentication

Two Factor Authentication App

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.


- 1 Use your favorite Authenticator App available from your mobile phone app store: Examples are "Google Authenticator" and "Authy"
- 2 Scan this QR code using authenticator app
- 3 Enter the 6-digit validation code - open your mobile device's Authenticator app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code

Download on the App Store

GET IT ON Google Play

Coupa Supplier Portal



XTR2MIA3JUWGAQHUC
DBBELU4WYIFOCCX

Click to copy Security Key

Cancel Enable

Extra security step


- If you have not yet set up two-factor authentication when you set up your profile, you will be prompted to do so before adding payment information (*this will open a new window in your browser, but afterwards you'll be able to return to the form*)
- Follow the instructions that appear on the screen

Step 8c: Remit-To – Customer Set-Up & Invoices

Tell your customers about your organization

Which customers do you want to see this?

All

Lifespace Communities Inc 

What address do you invoice from?

* Address Line 1


Address Line 2


* City

State


* Postal Code

Country/Region

Use this address for Remit-To 

Use this for Ship From address 

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. 

Which customers do you want to see this (Required Field)


- Choose which customers of yours in Coupa that you want to use this Remit-To


What addresses do you invoice from? (Required Field)

- Fill in the address from which you will be sending invoices
- Check the appropriate boxes pertaining to this address.

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Step 8d: Remit-To–Tax ID & Miscellaneous

What is your Tax ID? 


Country/Region 

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code 

Preferred Language

After checking the appropriate boxes pertaining the address...

What Is Your Tax ID (Required)

- Enter your country
- Enter your Tax-Id

Miscellaneous (Optional Field):

The invoice from code can be filled in if you normally use one.

Click “Save & Continue” once all necessary information is filled in.

Step 8e: Payment Information | Bank Account

Where do you want to receive payment? (Required field)

- Choose “Payment Type” and add bank account details
- Click “Save & Continue” once all necessary information is filled in.
- You can upload a voided check to “Supporting Documents”

Add a new Remit-To account

* Payment Type Bank Account

Address
Bank Account
Virtual Card

**Make sure you select
Bank Account or
Virtual Card here!**

What are your Bank Account Details?

Where do you want to receive payment?

1 2 3 4

* Payment Type Bank Account

What are your Bank Account Details?

Bank Account Country/Region: United States

State: Select an Option

Bank Account Currency: USD

Beneficiary Name: Coupa Test

Bank Name:

Account Number:

Confirm Account Number:

ACH Routing Number:

Wire Routing Number:

SWIFT/BIC Code:

My bank does not have a BIC code

Branch Code:

Bank Account Type: Business

Supporting Documents Choose Files No file chosen

Step 8f: Payment Information | Virtual Credit Card

* Payment Type

Virtual Card information

* Email Address

Process credit cards automatically?

What is your Remit-To Address?

Saved Addresses

New Address

Recommended

If you receive payments to a different location to where your business is registered, add the address here.

- If you choose Virtual Credit Card, you must have the ability to process a credit card as form of payment. You can't take this card and deposit in your bank account, and you can't use the card to purchase something from another business.
- If this is what you desire, you must also provide an email address for us to send the credit card credentials to.

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Step 8e: Remit-To – Receive Payments Info

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account Chase Coupa Test2 *****8910 111000614 *****3XXX	3501 Olympus Boulevard Coppell TX 75019 United States	Active	Manage

Deactivate Legal Entity Cancel Next

Where do you want to receive payment? (Required field)

- After clicking save and continue, again, confirm all information is correct. If all correct here, click “Next”
- After Setup is complete, you may add the Remit-To Address you just created to your profile

Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
3501 Olympus Boulevard Coppell TX 75019 United States	Active	Manage

Deactivate Legal Entity Done

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

Step 8f: Remit-To – Receive Payments Info

Banking Information

* Confirm how you would like to be paid

- ACH
- Virtual Credit Card

* Bank Address

* Bank City

* Bank State

* Bank Postal Code

* Bank Country

After the pop-up window closes, you'll need to scroll down in the form again, and confirm payment method:

- If you select ACH, you'll be required to add a bank address

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Step 9: ACH VOIDED CHECK

Ensure form is completed and signed

Remit-To Information - This is the section for your REMIT and payment information. Please complete this section, even if your REMIT address is the same as your primary business address. Once you fill in the REMIT address information, the form will then ask you to establish your digital payment account with us. That could be credit card, ACH, or digital check. If you select credit card you must already be setup to accept credit card payments (Lifespace will not pay any fees associated with credit card transactions). If you select ACH, that will be a transfer of funds from our bank to yours (please be sure to fill in every field). If you select Digital Check, you must maintain and manage a Coupa Supplier Portal (CSP) account in order to receive the digital check. If this section is not completed, we will not be able to establish a business relationship with you.

• 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

Copy of voided check No file chosen

Copy of Voided Check
or Bank Letter with
account and routing
number

No file chosen

Voided Check:

- If you are choosing to be paid via ACH, please upload a copy of your voided check or a Bank Letter

Step 10: Additional Information

Additional Information

Lifespace standard pay terms are Net 30 for virtual credit card and ACH. These pay terms are negotiable if you are willing to provide an early pay discount. Please enter your desired pay terms and the early pay discount percent you're willing to offer in the text box below. If Lifespace chooses terms other than what you've requested, you will be notified.

* Requested Payment Terms

Payment Terms Documentation No file chosen

If you have a signed agreement with Lifespace that dictates a specific pay term, please upload it here.

* What is your company supplying Lifespace Communities?

* Types of Goods or Services being provided

- We need your requested payment terms. If you already have a contract or agreement that dictates your particular payment terms, please upload it to "Payment Terms Documentation".

As you scroll down, we are asking a series of questions about our business relationship. Please answer every question, as they are all required.

If you select yes to any of these questions, there are additional steps outlined in the following slides:

- YES Providing services on community premises
- YES Operate in Florida
- YES Access to Protected Health Information

* Will your company be providing services on community premises? Yes No

* Does your company require a specialized license to provide services at the community? Yes No

* Does your company or any of your employees operate in Florida? Yes No
Is your company servicing any Florida Lifespace communities or are your company offices in Florida?

* Will you or your employees, as a service provider, have access to any protected health information of residents or team members of Lifespace Communities? Yes No

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Step 11a: Operating in Florida

* Will your company be providing services on community premises? Yes No

* Does your company require a specialized license to provide services at the community? Yes No

* Does your company or any of your employees operate in Florida? Yes No

Is your company servicing any Florida Lifespace communities or are your company offices in Florida?

Will your company or any of your employees be providing services on site at any Lifespace Community in Florida? Yes No

NOTE: This external form must be completed and uploaded to the Supplier Onboarding Form before submission if this applies to you or your organization.

- If you are a supplier that **operates in Florida and operates on our community premises**, you will be required to complete a “Florida Subcontractor Legal Employees Affidavit”
- You can find a link added to this form you need to fill out and upload.

provide a affidavit that my company does not employ, contract with, or subcontract with an unauthorized alien

FLORIDA SUBCONTRACTOR LEGAL EMPLOYEES AFFIDAVIT

Pursuant to Florida Statute § 448.095(2)(b) any contractor doing business with a Florida public employer that enters into an agreement with a subcontractor, must require the subcontractor to provide an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. Furthermore, the contractor must maintain a copy of this affidavit on file for the duration of the agreement with the subcontractor.

In accordance with the requirement from Florida Statute § 448.095(2)(b) described above, by affixing your signature below, you hereby affirm that the subcontractor does not employ, contract with, or subcontract with any unauthorized alien.

FL SUBCONTRACTOR
LEGAL EMPLOYEES
AFFIDAVIT LINK

• <https://www.lifespacecommunities.com/c...>

* Notarized Florida
Vendor Affidavit

Choose File No file chosen

Step 11b: Operating with Protected Health Information

* Will you or your employees, as a service provider, have access to any protected health information of residents or team members of Lifespace Communities? Yes No

* By acknowledging that you will have access to PHI, you are required to complete a Lifespace Business Associate Agreement (BAA)

Choose File No file chosen





- If you are a supplier that will have access to protected health information (PHI) of residents or team members, you will be required to complete a Lifespace Business Associate Agreement (BAA)
 - You can access this directly from the form
 - This must be completed and uploaded to this form before submission if this applies to you or your organization

Step 12: Commercial General Liability Insurance


Insurance Information


* Commercial General Liability Insurance

Effective Date 

* Expiration Date 

* Attachments [Add](#) [File](#)

[Browse](#) 

 Drop files here

Description

- If you are a supplier that will be completing significant work on our campuses, you may be required to provide your Commercial General Liability Insurance form.
- This is generally for contractors and subcontractors. Entertainers are not required to provide this.

Step 13: Submit for Approval



Lifespace Communities, Inc.

Profile Lifespace Communities, Inc.

Your information has been submitted

SIM Form 2

Pending Approval

Supplier Information Test Vendor DBA Name

If you would like to review our supplier website, you can find that at <https://www.lifespacecommunities.com/lifespace-for-suppliers/>

Basic Information

* Legal Name of Test Vendor DBA Name

After all steps are completed, click on “Submit for Approval” If there are any errors, you will receive a notification at the top of the screen. Please fix and submit again.

- Once you submit, this green line appears at the top of the screen.
- The submitted form will be reviewed and approved by a Lifespace team member.

Step 14: Approval

Once you receive an email telling you you've been approved as a supplier, this is when you can begin doing business with Lifespace.

Top 3 Reminders

- 1) Business must be approved in Coupa before it can be done
- 2) If you have a PO number, it must be on your invoice
- 3) Every invoice must have a unique invoice number

Questions?

Please reach out to Lifespace at

CoupaHelp@lifespacecommunities.com