



Coupa

Create or Update Supplier Information in Coupa Supplier Portal

As of September 2019



Overview

Suppliers can create or update contact and payment information for transacting with ENGIE via two methods:

- Provide information via email using a one-time link
- Registering on the **Coupa Supplier Portal (CSP)** and completing the requested profile information

CSP registration is recommended as it is a free tool that allows suppliers to do business with customers with the ability to acknowledge purchase orders, submit invoices, and maintain contact/payment information in real time.

Objective

This job aid describes the process on how to create or update your supplier information via the Coupa Supplier Portal (CSP).

Steps to Create/Update Supplier Data in CSP:

If you are a new vendor doing business with ENGIE, or if you are an existing vendor needing to update your contact/payment information, Engie procurement will send you an e-mail from Coupa to update your information. To request an invitation to register or update, please send an email to engiena-centralprocurement@engie.com. In this email, there will be a link to join and register for the CSP to update your information. **Click 'Join and Respond' to begin.**

Dear Valued Supplier,

ENGIE North America would like to conduct business with you through Coupa, our online procurement tool. In order to provide timely payments, Engie wants to ensure that your profile is valid and up to date.

To get started, please submit your complete company information. You can do this in two ways (see instructions at end of email):

1. You can do a one-time registration; or,
2. You can register directly through the Coupa Supplier Portal (CSP) free-of-charge.

We highly recommend registering through the CSP as it provides the following benefits:

- Self-maintenance of company and payment information
- Viewing and acknowledging your purchase order
- Creating electronic invoices and credit notes
- Visibility to invoice approval status and payment details
- Ability to have multiple users in your account to track the activity and complete necessary procurement and invoicing actions

The options for submitting invoices to ENGIE are as follows:

- Via the CSP – please click [here](#) for a demonstration on how to submit via the CSP
- Via email – please see how-to video [here](#)
- Via direct email – invoices@engiena.coupahost.com . Please make sure you include the PO # written on it

When submitting your information, please provide a Federal Tax ID and ACH banking information. Please ensure that the form is submitted with all required data. If the form is incomplete, it will be returned to this email address for resubmission.

Most Common reasons why a new vendor form is rejected:

1.- For US vendors: 10 digits zip code: the form requires to enter a 10 digits zip code in the "Remit to address" and "Primary Address", if you do not know your complete zip code you can find it here: <https://m.usps.com/m/ZipLookupAction?search=address>

2.- W9 or WB8 out of date: the form requires to enter a W9 or WB8 signed in the last 12 months.

Please click on the first link to begin registration without signing up for the Coupa Portal

Please click on the second link to begin registration for the Coupa Portal.

[Join and Respond](#)

[Respond Without Joining](#)

Join Coupa Supplier Portal

A register to CSP portal screen is displayed. Register and Login to the CSP by creating an account.

- 1 Enter first name in the **First Name** field.
 - 2 Enter last name in the **Last Name** field.
- Note: Additional users can be added after registering for the portal.
- 3 Enter company name in the **Company** field.
 - 4 Enter and confirm a password in the **Password** and **Password Confirmation** field.
 - 5 Select the **I accept the Privacy Policy and the Terms of Use** checkbox.
 - 6 Click the **Submit** button.

The screenshot shows the 'Join the Coupa Supplier Portal' registration form. The form includes the following fields and elements, each with a numbered callout:

- 1: First Name field (containing 'CDW')
- 2: Last Name field (containing 'Supplier')
- 3: Company field (containing 'CDW Supplier')
- 4: Email field (containing 'engie.supplier+90009@gmail.com')
- 4: Password field (containing '*****') with a note: 'Use at least 8 characters and include a number and a letter.'
- 4: Password Confirmation field (containing '*****')
- 5: A checkbox labeled 'I accept the Privacy Policy and the Terms of Use.' which is checked.
- 6: A blue 'Submit' button.

Welcome Screen

The Welcome to the New Coupa Supplier Portal screen is displayed.

- 7 Click the **Skip** or **Close** button.



Coupa supplier portal home page

- 8 Click the **Profile** tab to update contact/payment information.

Note: You may be directed straight to your profile section if ENGIE has requested this information.



Note: The Profile tab is the only place where updates to contact, remittance, and payment information will be acknowledged. Any changes completed in the Admin tab will not be sent to ENGIE.



Profile Screen

- 9 Populate the mandatory fields (any field with red asterisk *)
- **Supplier Legal Name**
 - **Display or DBA Name**
 - **Physical Address:** For postal codes, please refer to hints in form for country-specific format requirements. (ZIP+4 format required for US postal codes)
 - **Physical Address State/Region**
 - **Primary Contact**
 - **PO Email:** this email address will receive PO email notifications
 - **PO Method**
 - **PO Change Method**
 - **DUNS Number**
 - **Are you an ISN relevant vendor?**



Note: The supplier name should match box 1 on your W9. The supplier display or DBA should match box 2 of the W9.

For US Vendors a 9-digit zip code is required

Supplier Information DRIVEN

Contact and General Information

* Supplier Legal Name

* Display or DBA Name

* First Name

* Last Name

* Email address *must be valid email

Mobile Phone

Work Phone

Fax

* PO Email

Please enter the email address in which you would like to receive purchase orders in. You are also able to receive against the PO directly from your email.

PO Method

Hint: Please Select From: Other options (JMSL, XSL, etc.) require additional setup.

PO Change Method

Hint: Please Select From: Other options (JMSL, XSL, etc.) require additional setup.

IT IS REQUIRED TO USE 9-DIGIT ZIP+4 FORMAT (e.g. 77056-3831) FOR THE POSTAL CODE OF THE PRIMARY ADDRESS

* Primary Address

Location Code	<input type="text" value="DRIVEN"/>
Address Name	<input type="text" value="DRIVEN"/>
PO Box	<input type="text"/>
PO Box Postal Code	<input type="text"/>
Street Address	<input type="text" value="21 Upgrade street"/>
Street Address 2	<input type="text" value="21 Upgrade street2"/>
Postal Code	<input type="text" value="11111"/>
City	<input type="text" value="San Mateo"/>
State Region	<input type="text" value="CA"/>
Country	<input type="text" value="United States"/>

IT IS REQUIRED TO USE 9-DIGIT ZIP+4 FORMAT (e.g. 77056-3831) FOR THE POSTAL CODE OF THE PRIMARY ADDRESS

* Physical State/Region

DUNS Number

Are you an ISN relevant vendor?

Effective Date

Expiration Date

Attachment

Description

If yes, please attach verification and include and any details below.

10 Scroll-down and populate the following mandatory fields:

- **U.S. Tax ID:** must be a valid federal tax ID, SSN should not be used
- **Business Classification**
- **Account Currency**
- **U.S. Federal Tax Form**



Note: Hover over the blue "i" icon for direction on character limitation for specific fields. These character count requirements must be met

Tax Information

* U.S. Tax ID 10

1099 Classification

* Business Classification

* Account Currency

U.S. Withholding Tax

* U.S. Federal Tax Form

Attachments [Add File](#)

Attach the appropriate IRS document (W9, W-8BEN, W-BEN-E) signed and dated within the last 12 months.

11

11 Scroll-down to populate the following fields, if applicable:

- **Minority and Small Business Information**

Minority and Small Business Information

Minority Owned Business

Minority Owned Certificate Date

This field is required if minority owned business.

12 Scroll-down to populate the mandatory fields

- **Remittance Advice Email:** This will be the email where payment notifications will be sent
- **Pay Method:** ACH or Wire Transfer

* Remit-to State/Region

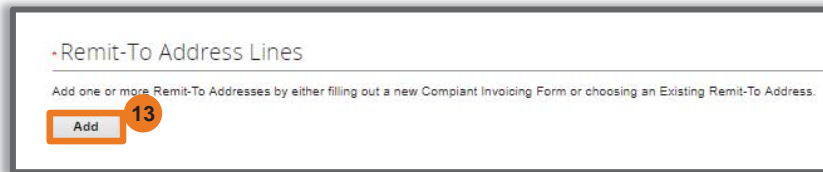
* Remittance Advice Email

Please enter email in which payment notifications will be sent to.

* Pay Method

12

- 13 Scroll-down to the **Remit-To Address Lines** section and click the **Add** button to add the Remit-To address.



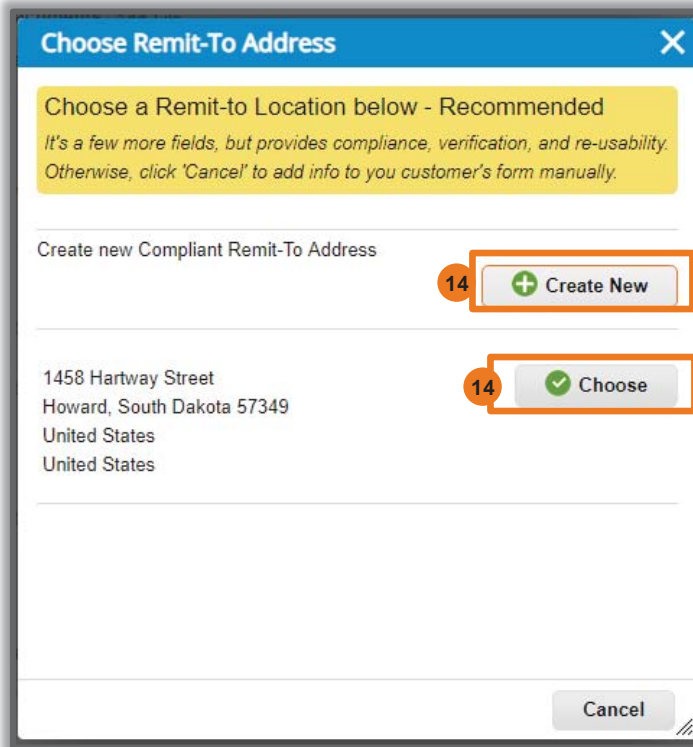
Choose Remit-To Address window

The **Choose Remit-To Address** pop-up is displayed. You can select from the two options.

- 14 Click the **Create New** button to create a new Remit-To address

OR

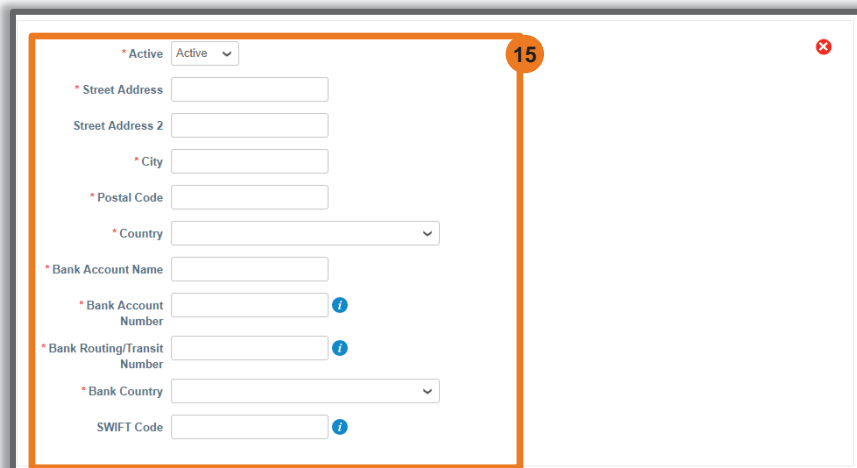
Click **Choose** to update the existing Remit to Address.



Note: Only one active remit-to address / banking info is allowed. If you need to update an existing remit-to address, please inactivate the current remit-to and add a new active field.

- 15 If the **Create New** button is selected, populate the following mandatory fields:

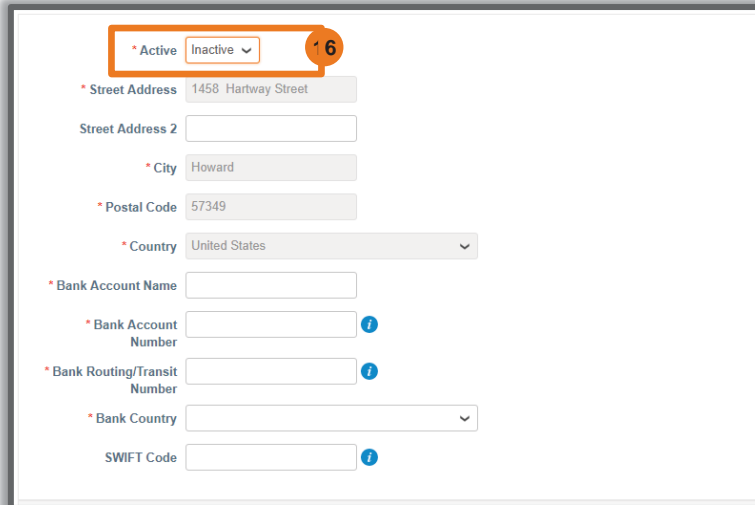
- **Active**
- **Street Address**
- **City**
- **Postal Code**
- **Country**
- **Bank Account Name**
- **Bank Account Number**
- **Bank Routing/Transit Number**
- **Bank Country**



16 If the **Choose** button is selected, change the status of the existing remit to address to *Inactive*

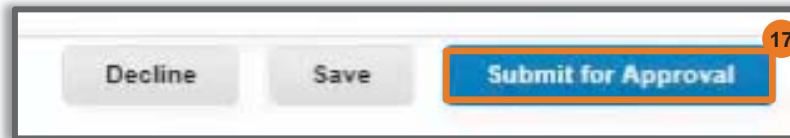
- **Active:** Set to *Inactive*

Then refer to Step 15 to create a new remit to address.



A screenshot of a web form. At the top, there is a dropdown menu with 'Active' selected and 'Inactive' as an option. A red box highlights the 'Inactive' option, and a red circle with the number '6' is next to it. Below the dropdown are several input fields: 'Street Address' (1458 Hartway Street), 'Street Address 2', 'City' (Howard), 'Postal Code' (57349), 'Country' (United States), 'Bank Account Name', 'Bank Account Number', 'Bank Routing/Transit Number', 'Bank Country', and 'SWIFT Code'. Each field has a red asterisk indicating it is required. There are also blue information icons next to some fields.

17 Click the **Submit for Approval** button.



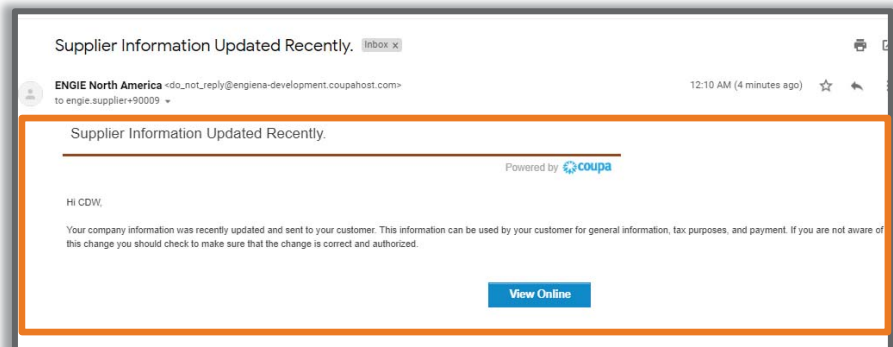
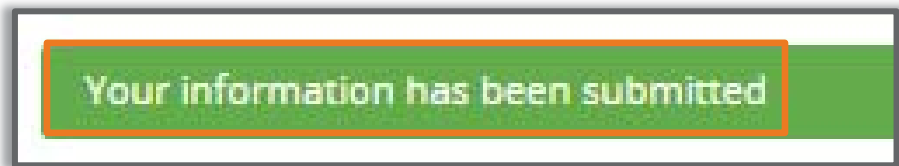
A screenshot of three buttons: 'Decline', 'Save', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted with a red box and a red circle with the number '17'.

Supplier Data created or updated

A success message stating that the information is successfully submitted is displayed.

Confirmation Email

Once the information has been submitted, the supplier will receive an email notification confirming the information has been updated.



The same process is also carried out for a Canadian supplier. The New Supplier Request Form is slightly different for Canadian Supplier. Please follow the instruction in the hints below each tax field on format for entry. The following fields are unique to Canadian suppliers:

- **CAN: GST/HST No.**
- **CAN: BC Provincial Sales Tax (PST) No.**
- **CAN: MB Provincial Sales Tax (PST) No.**
- **CAN: Quebec Sales Tax (QST) No.**
- **CAN: SK Provincial Sales Tax (PST)**
- **Canada Withholding Tax**
- **Subcontractor/Occupational Health and Safety Information**

The screenshot shows a web-based form for adding a new Canadian supplier. The form is titled "Supplier Information" and "Contact and General Information". It includes fields for "Supplier Legal Name" (Canadian Supplier), "Company or DBA Name" (Canadian Supplier), and "Physical Address" (Location Code, Address Name, PO Box, POC Box Postal Code, Street Address 1, Street Address 2, Postal Code, City, State Region, and Country). The "Tax Information" section includes fields for "GST/HST No.", "BC Provincial Sales Tax (PST) No.", "MB Provincial Sales Tax (PST) No.", "Quebec Sales Tax (QST) No.", "SK Provincial Sales Tax (PST)", "Canada Withholding Tax", and "Account Currency". The "Remittance and Banking Details" section includes fields for "Remittance Address" and "Pay Method".