Coupa

Create or Update Supplier Information in Coupa Supplier Portal (US Suppliers)

As of June 2020

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 and 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.**

coupa Request for Information from ENGIE North America

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**

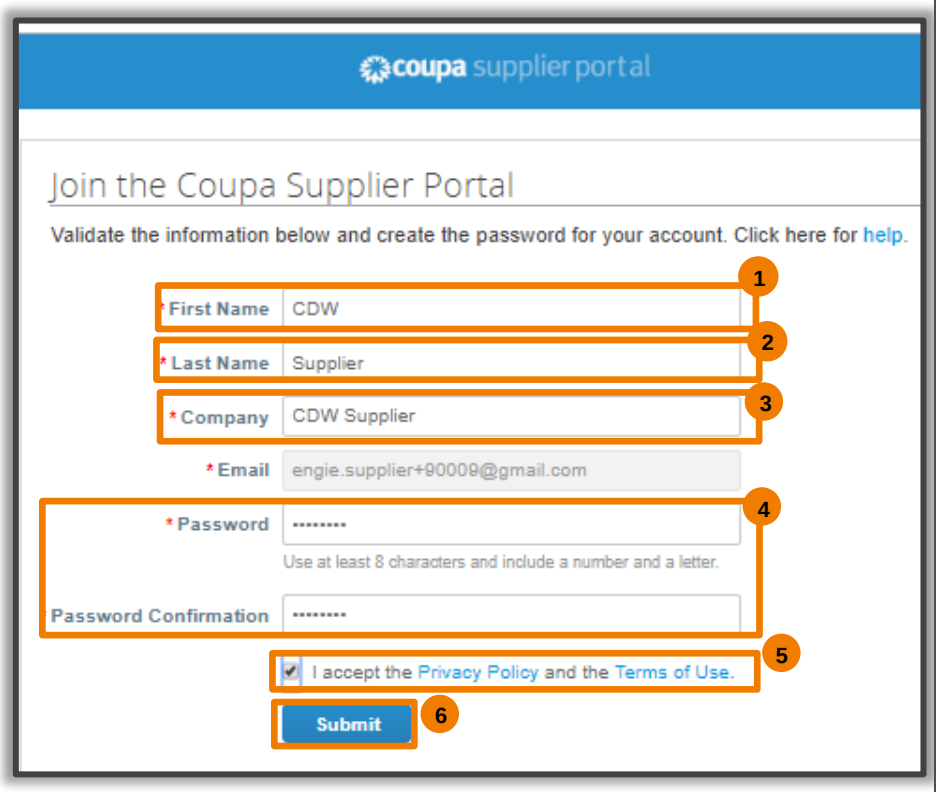
Join Coupa Supplier Portal

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.*



Welcome Screen

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

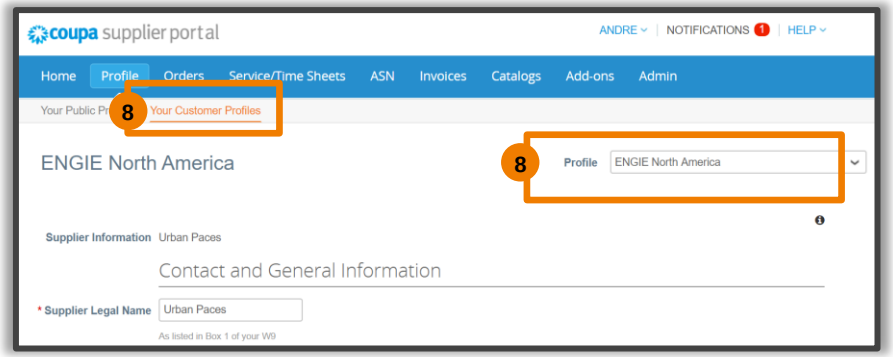
7. *Click the **Skip** or **Close** button.*

Coupa supplier portal home page

8 *Click the **Your Customer Profiles** tab to update contact/payment information in your customer profiles.*

*Note: You may be directed straight to Your Customer Profiles section if ENGIE has requested this information. You can verify or change the customer name in the Profile dropdown; Select **ENGIE North America** from the drop-down.*

Note: The *Profile > Your Customer Profile* tab is the only place where updates to contact, remittance, and payment information will be acknowledged by ENGIE. Any changes completed in the *Profile > Your Public Profile* or *Admin* tabs will not be sent to ENGIE



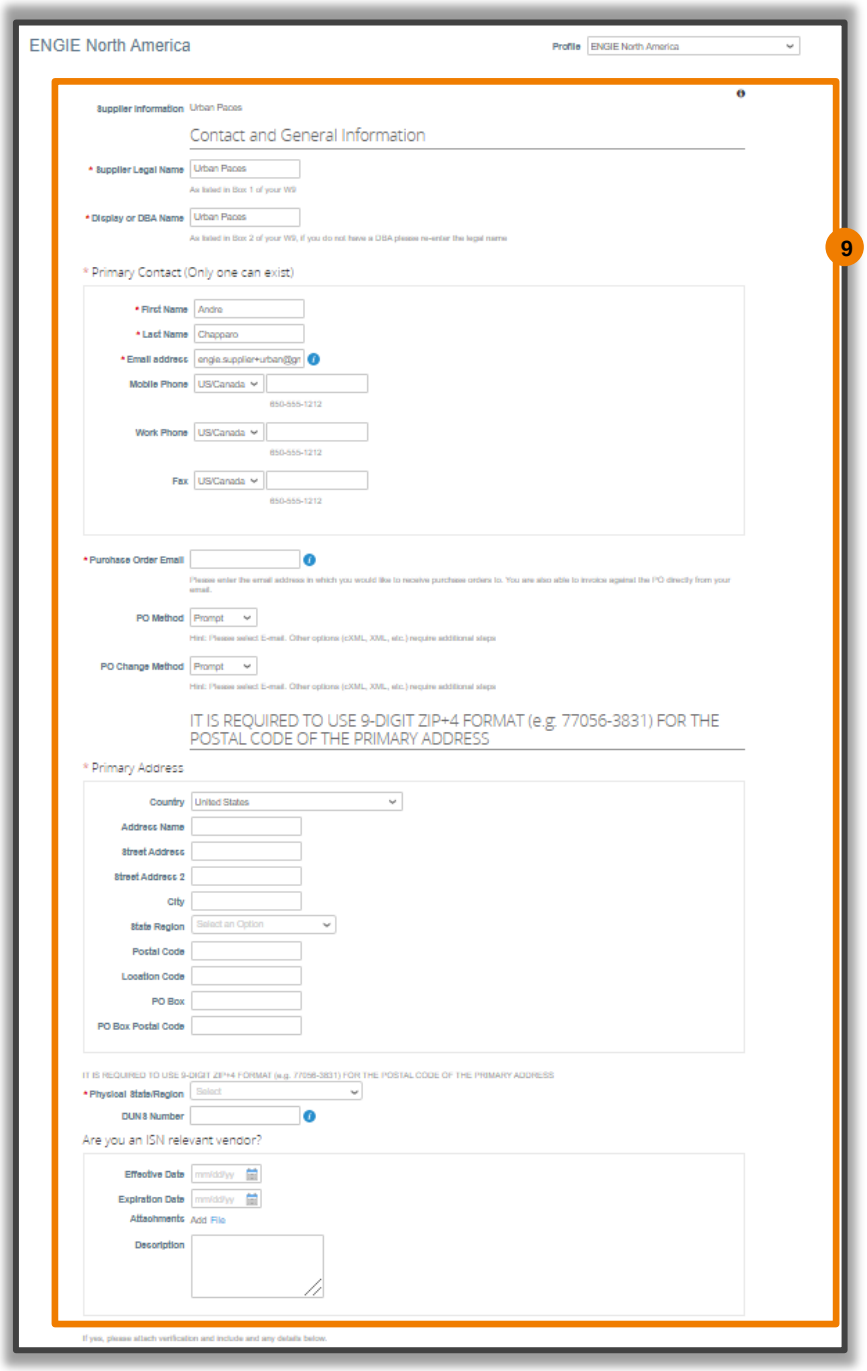
Profile Screen (US Supplier)

9 *Populate the mandatory fields (any field with red asterisk *)*

- ***Supplier Legal Name:*** Should match box 1 on your W9
- ***Display or DBA Name:*** Should match box 2 of the W9
- ***Physical Address:*** *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:*** *Please select "Email"*
- ***PO Change Method:*** *Please select "Email"*
- ***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.

ZIP+4 format is required for US postal codes.

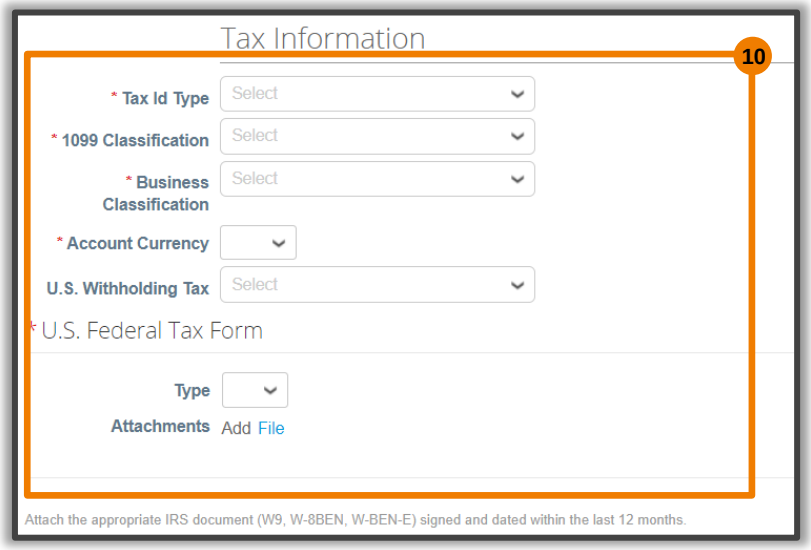


10 *Scroll-down and populate the following mandatory fields:*

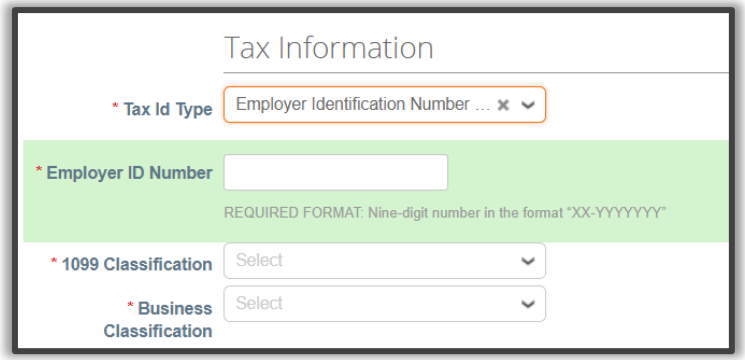
- ***Tax Id Type:*** *select the Tax id type - Social Security Number or Employer Identification number*
- ***Tax id Type = Employer identification Number:***

  REQUIRED FORMAT: Nine-digit number in the format "XX-YYYYYYY"
- ***Tax id Type = Social Security Number:***

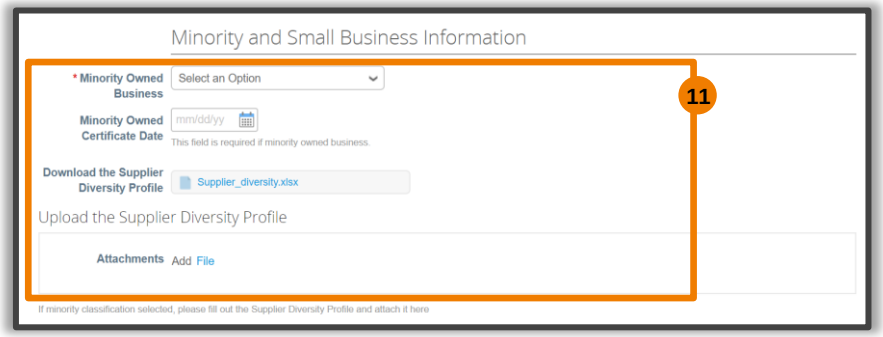
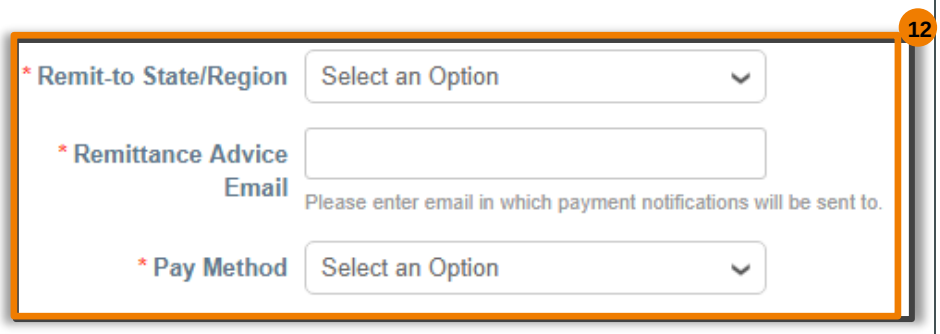
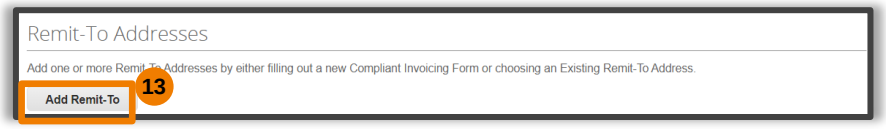
  REQUIRED FORMAT: Nine-digit number in the format e.g. 123456789
- ***1099 Classification***
- ***Business Classification***
- ***Account Currency***
- ***U.S. Federal Tax Form***



If Tax Id Type is set to "Employer Identification Number":



If Tax Id Type is set to "Social Security Number":

11 *Scroll-down to populate the following fields, if applicable:* • ***Minority and Small Business Information:*** *Download the Supplier Diversity Profile, fill it out, save it, and attach it back to the form*	
12 *Scroll-down to populate the mandatory fields* • ***Remit-To State/Region:*** *Select the State/Region of your Remit-To Address* • ***Remittance Advice Email:*** *This will be the email where payment notifications will be sent* • ***Pay Method:*** *ACH or Wire Transfer*	
13 *Scroll-down to the* ***Remit-To Address*** *section and click the* ***Add Remit-To*** *button to add the Remit-To address.*	

Choose Remit-To Address window

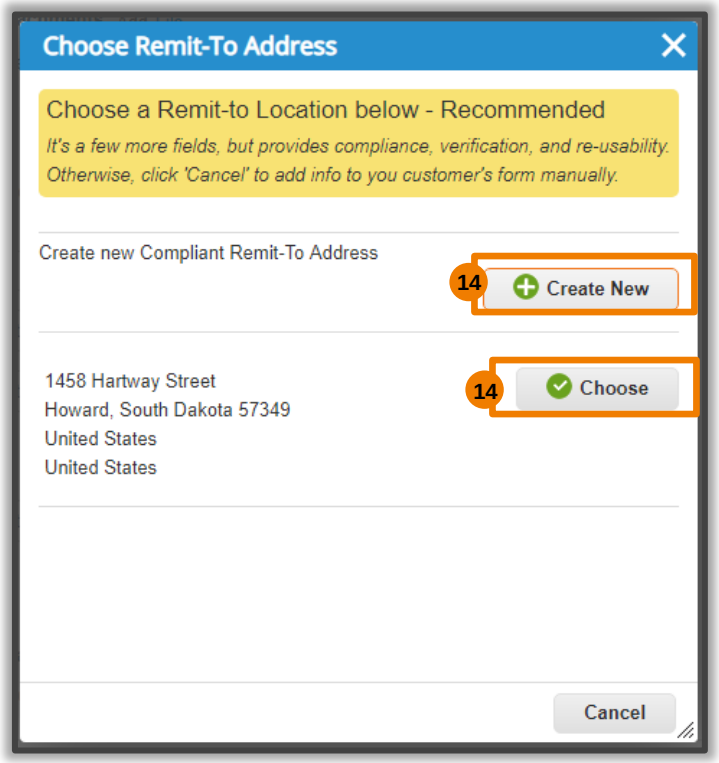
*The **Choose Remit-To Address** pop-up is displayed. You can select from the two options.*

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

OR

*Click **Choose** to use a Remit to Address previously added to your Engie North America or Public profile.*

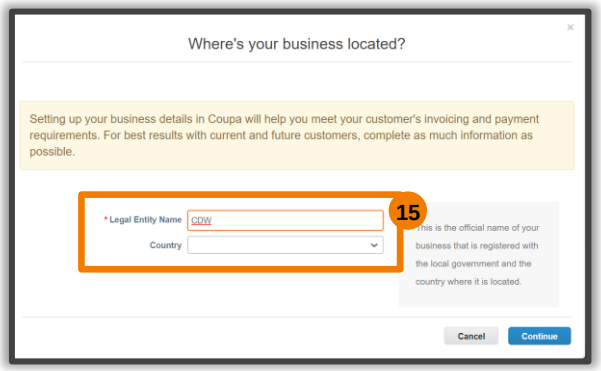
Note: Only one active remit-to address / banking info is allowed. If you need to update an existing remit-to address, please inactivate the current remit-to and add a new active remit-to address. Refer to Step 18 for the instruction to deactivate existing remit-to.



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

- ***Legal Entity Name***
- ***Country***

*Click **Continue***



16 *On the Next Page:*

- *Make sure in **"Which customers do you want to see this?" Engie North America check box** is selected*

Populate the fields:

- ***Address Line 1***
- ***City***
- ***State***
- ***Postal Code***

*Click **Save and Continue***

17 *On the Next Page:*

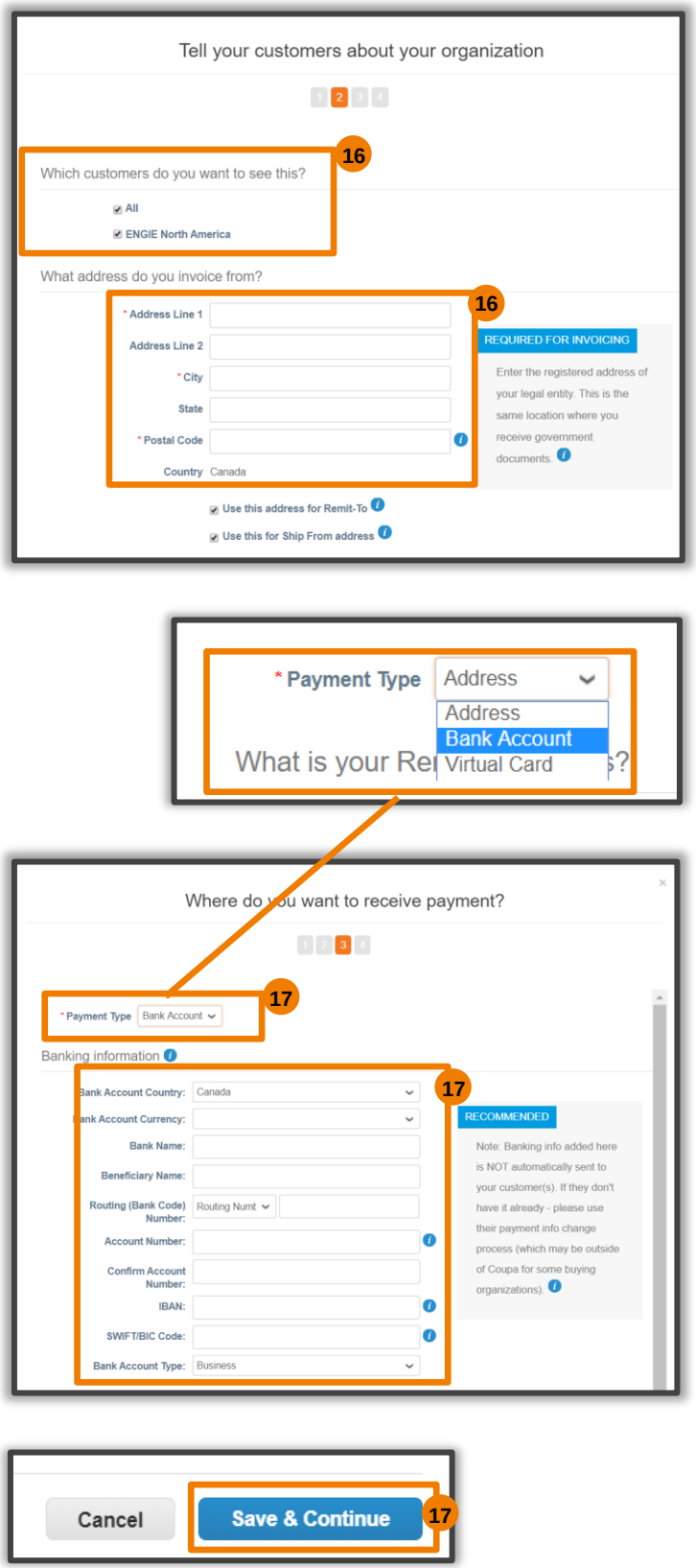
Select from the drop-down:

- ***Payment Type:** Select Bank Account*

Populate the fields:

- ***Bank Account Name***
- ***Bank Account Number***
- ***Bank Routing***
- ***Bank Country***

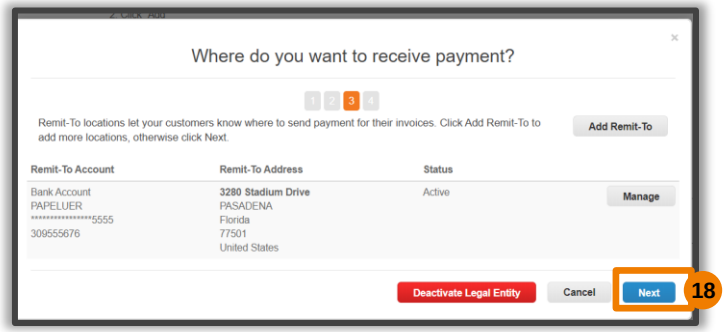
*Click **Save and Continue***

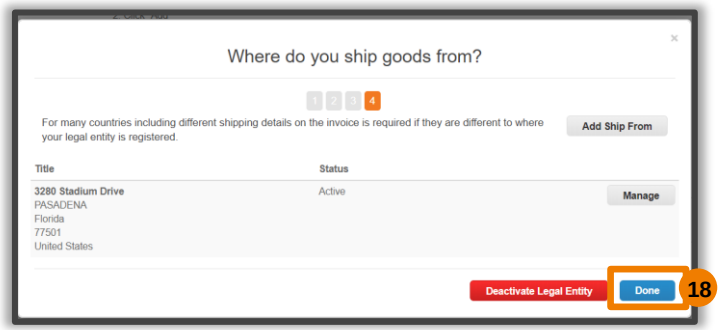


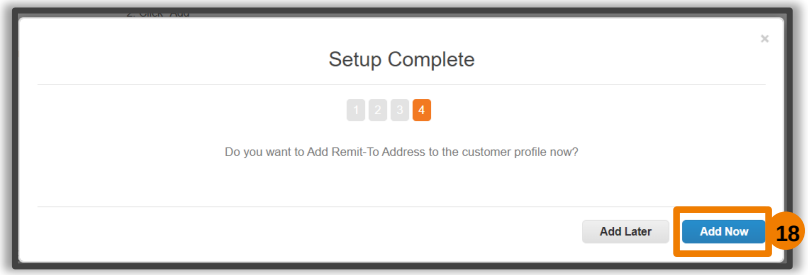
18 *On the Next Page:*

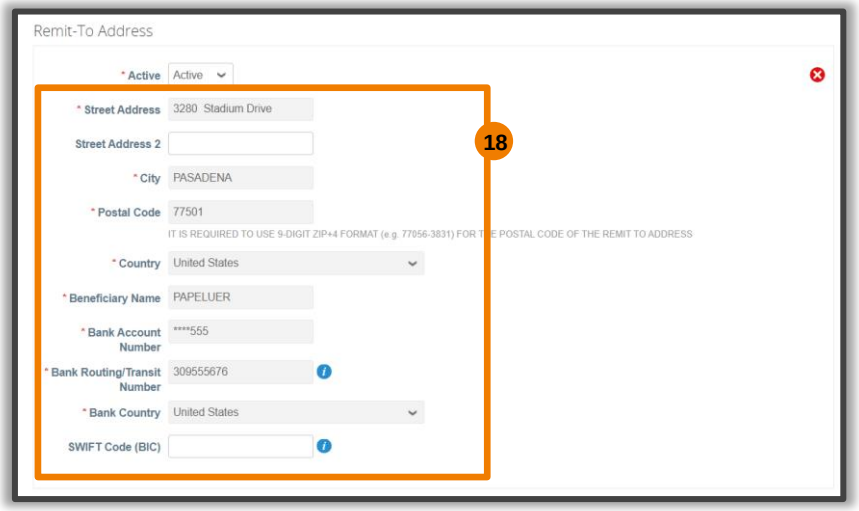
*Click **Next, Done** and lastly **Add Now***

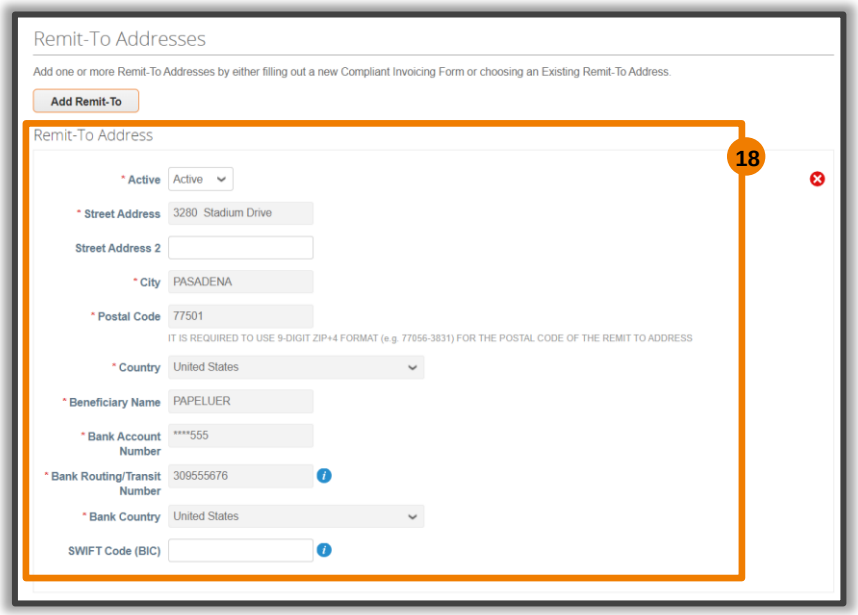
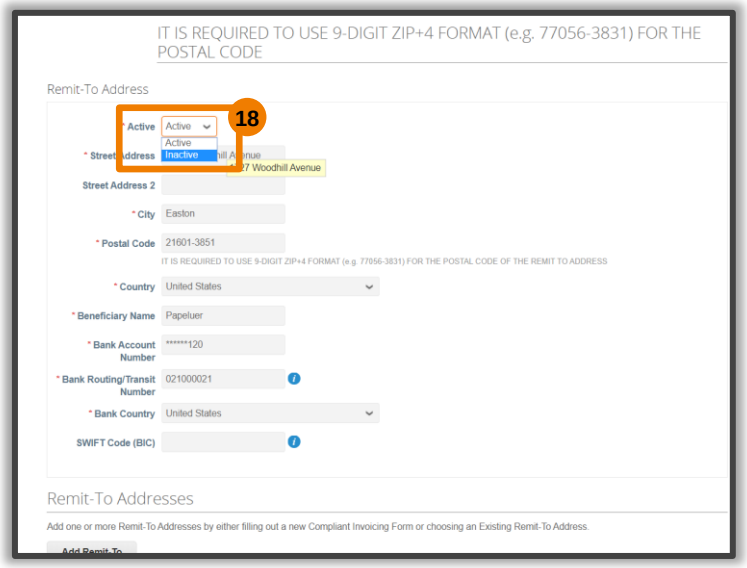
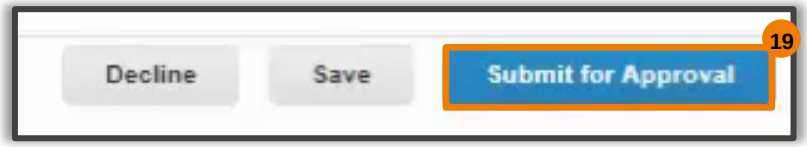
The new remit-to address will be added in the form.









18 *If the **Choose** button is selected, the existing Remi to address will be added in the form* • ***Only the fields without data will be editable***	
18 *If you have already an existing Remit to Address in your Engie North America profile and you wish to update it, you must inactivate the existing remit-to address:* • ***Active:** Set to Inactive* *Then refer to Step 13 to 15 to create a new remit to address.*	
19 *Click the **Submit for Approval** button at the bottom of the Form.*	

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.*