Coupa

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

As of April 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 an e-mail from Coupa to provide/update your information. 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.

To request an invitation to register or update, please send an email to achatspurchasing.esc@engie.com (For Engie Services Inc.) engiena-centralprocurement@engie.com (For other Engie North America entities).
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

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

- **Supplier Legal Name**
  Legal Name should match your GST Registration with the CRA

- **Display or DBA Name**

- **Primary Contact**

- **Physical Address**: For Canadian postal code the following format is required: A1A 1A1 (6-digits with a with a space in between the third and fourth digit)

- **Physical Province**

- **PO Email**: this email address will receive PO email notifications

- **PO Method**: Select email

- **PO Change Method**: Select email

- **DUNS Number**

**Note**: The Supplier legal name should match their GST Registration for CRA

For Canadian Postal Code, A1A 1A1 format is required.
Scroll-down and populate the following fields. Please follow the formatting instruction in the hints below each tax field:

- **CAN: GST/HST No.** must be a valid GST tax ID.
- **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)**
- **Account Currency**

Scroll-down to the **Remit-To Addresses** Section

Take note of the instruction related to bank routing number format requirements:

**REQUIRED FORMAT:** 0YYYXXXXX (9 digits) where YYY is the bank (financial institution) number and XXXXX is the transit (branch) number.

Then 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:

12. Click the Create New button to create a new Remit-To address
OR

Click Choose to use your existing Remit to Address in your Engie North America 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 field. Refer to Step 15 for the instruction to deactivate existing remit-to.

If the Create New button is selected, populate the following mandatory fields:
- Legal Entity Name
- Country

Click Continue
Then Click Save & Continue
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
- VAT ID

Click Save and Continue

On the Next Page:
Select from the drop-down:
- Payment Type: Select Bank Account

Populate the fields:
- Bank Account Name
- Bank Account Number
- Routing Number

REQUIRED FORMAT: 0YYYYXXXXX (9 digits) where YYY is the bank (financial institution) number and XXXX is the transit (branch) number.
- Bank Country

Click Save and Continue
On the Next Page:
Click Next, Done and lastly Add Now
The new remit-to address will be added in the form.
If the Choose button is selected, the existing remit-to address will be adopted in the form:

- Only the fields without data will be editable

If you have already an existing Remit to Address in your Engie North America profile and you wish to update it, deactivate the existing remit to address:

- **Active:** Set to Inactive

Then refer to Step 11 to 15 to create a new remit to address.

Scroll-down to populate the mandatory fields:

- **Remit-to Province**
- **Remittance Advice Email:** This will be the email where payment notifications will be sent
- **Pay Method:** ACH or Wire Transfer
Subcontractor/Occupational Health and Safety Information Section (Canadian Suppliers)

This section is only for subcontractors.

Scroll-down to populate the mandatory fields

- **Is the supplier a subcontractor?** Tick Yes. The rest of the questionnaires, fields will be shown

- **Insurance:** Attach the insurance documents.

- **Conditions A B C D accepted (Tick the cases for acceptation):** Tick Yes, if you accept all the conditions. Occupational Health and Safety Program pdf file will be available for download.

- **Upload Health and Safety Program here:** Read and fill out the questionnaire and attach the file.

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

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.
Supplier Information Updated Recently.

HI CDW,

Your company information was recently updated and sent to your customer. This information can be used by your customer for general information, tax purposes, and payment. If you are not aware of this change you should check to make sure that the change is correct and authorized.

View Details