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 and 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).

ENGIE North America Profile Information Request - Action Required

Powered by coupa

Dear Valued Supplier,

ENGIE Services Inc, part of 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:

1. You can do a one-time registration by clicking 'Respond Without Joining'; or,
2. **Recommended:** You can register directly through the Coupa Supplier Portal (CSP) free-of-charge by clicking 'Join and Respond'.

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
- Submitting 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:

1. **Recommended:** Via the CSP - A job aid is available on the ENGIE Procurement Website. You can download job aid Create or Update Supplier Information in Coupa Supplier Portal. That can help you to submit your approval request.
2. Via PO email - A job aid is available on the ENGIE Procurement Website.
3. Via direct email – send to invoices+Canada@engiena.coupahost.com - make sure to include the PO # on the invoice attachment

When submitting your information, please provide ACH/EFT banking information. Pls pay attention to a void the common mistake while filing out your form: banking routing number/requirements. **Please ensure that the form is submitted with all required data within 15days, after this day, our invitation will be cancelled automatically**. If the form is incomplete, it will be returned to this email address for resubmission.

If you have any questions about filling out the form or registering, please contact Achatspurchasing.esc@engie.com.

Join and Respond | Respond Without Joining

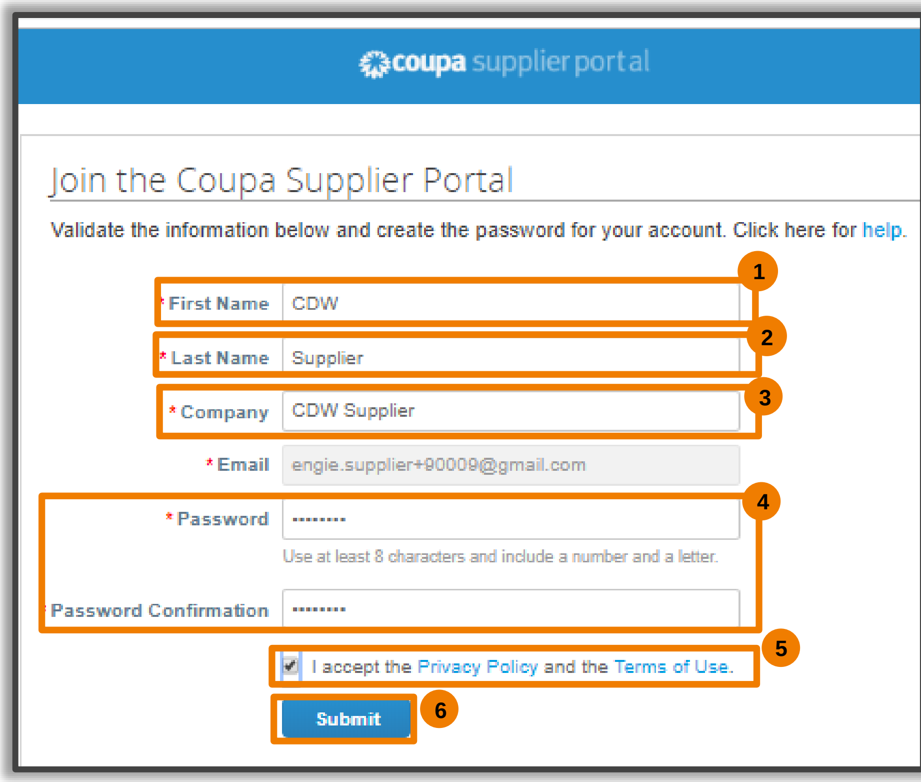
Join Coupa Supplier Portal

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.

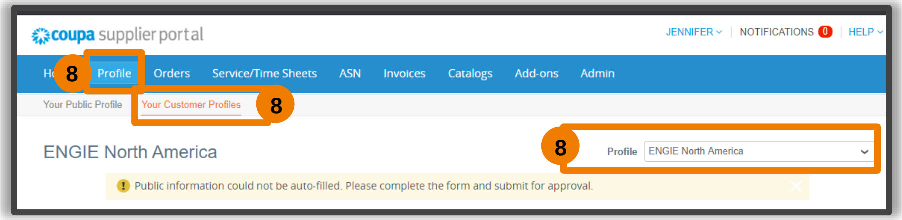
3. *Enter company name in the **Company** field.*
4. *Enter and confirm a password in the **Password** and **Password Confirmation** field.*
5. *Select the **I accept the Privacy Policy and the Terms of Use** checkbox.*
6. *Click the **Submit** button.*



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 **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

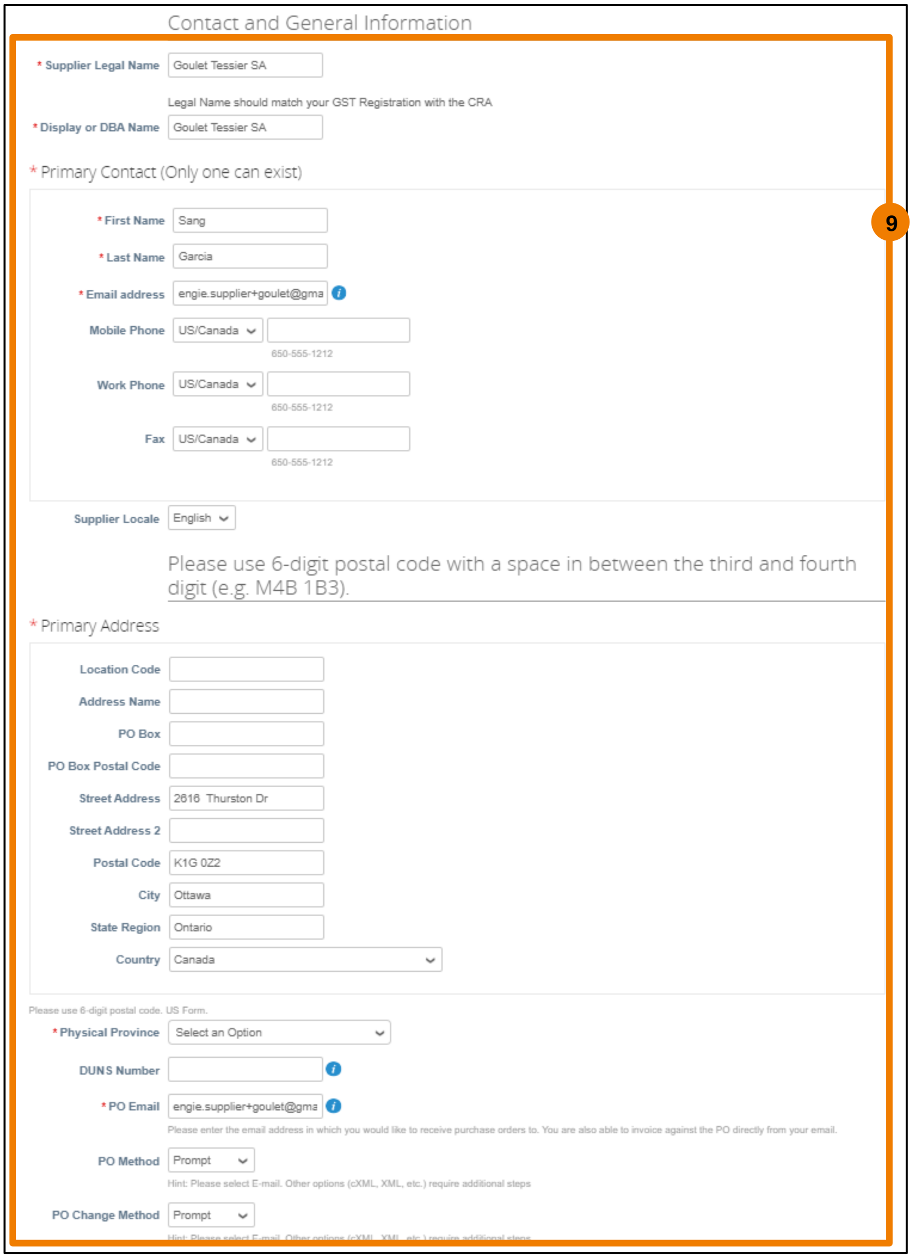
9 *Populate the mandatory fields (any field with red asterisk *)*

- ***Supplier Legal Name***

  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.



<table>
<tr>
<td>
10 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

</td>
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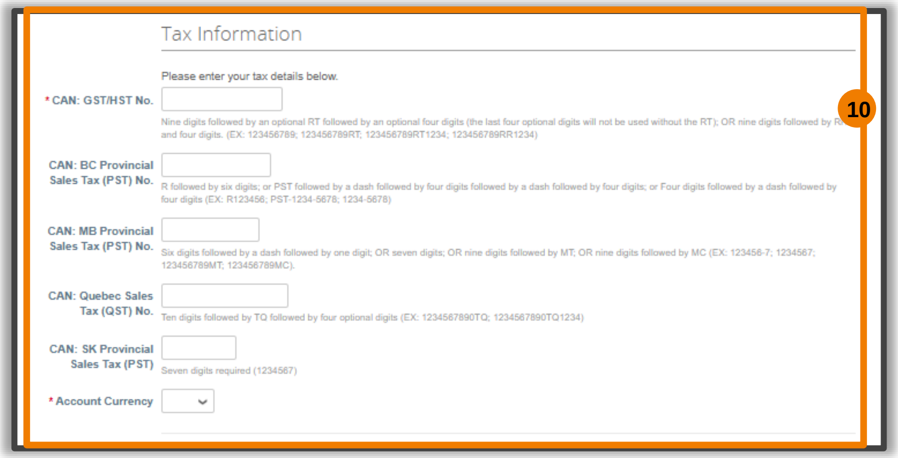

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<tr>
<td>
11 Scroll-down to the Remit-To Addresses Section
Take note of the instruction related to bank routing number format requirements:
REQUIRED FORMAT: <u>0YYYXXXXX (9 digits)</u> where YYY is the bank (financial institution) number and XXXXX is the transit (branch) number.
Then click the Add button to add the Remit-To address.
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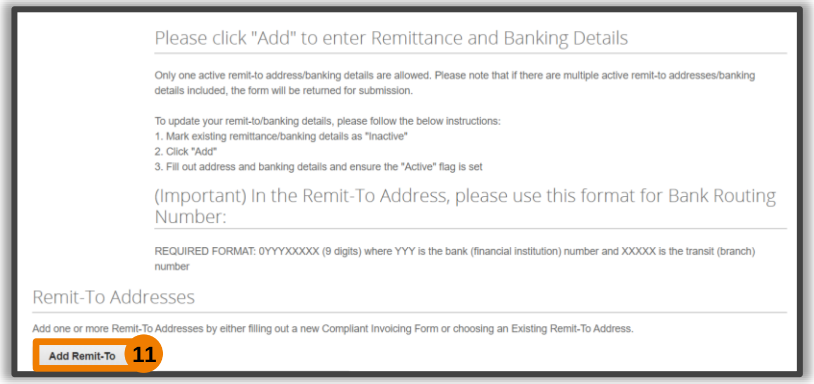

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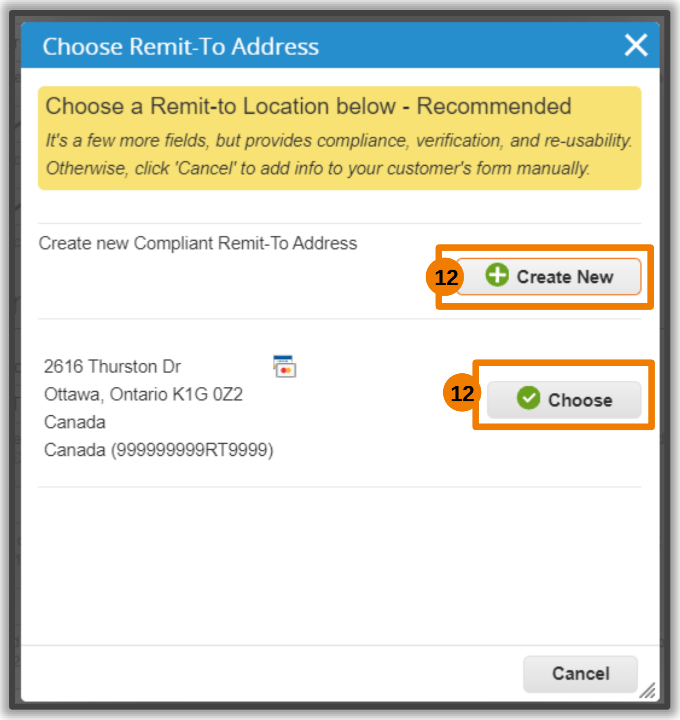
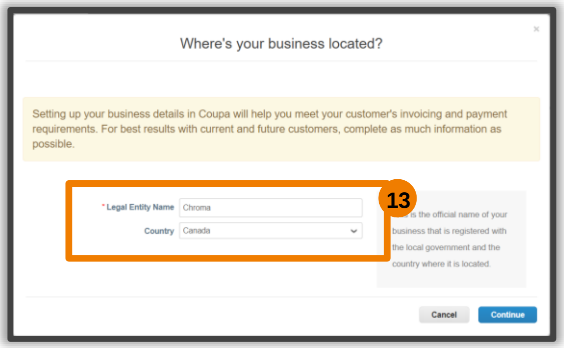
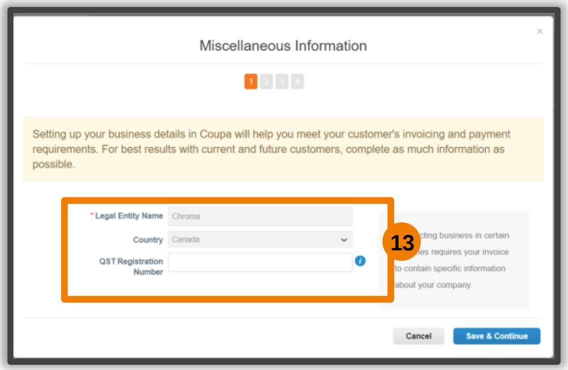
Choose Remit-To Address window *The **Choose Remit-To Address** pop-up is displayed. You can select from the two options.* 12 *Click the **Create New** button to create a new Remit-To address* *OR* *Click **Choose** to use your existing Remit to Address in your Engie North America profile.* ***Note:*** 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.	
13 *If the **Create New** button is selected, populate the following mandatory fields:* • ***Legal Entity Name*** • ***Country*** *Click **Continue*** *Then Click **Save & Continue***	 

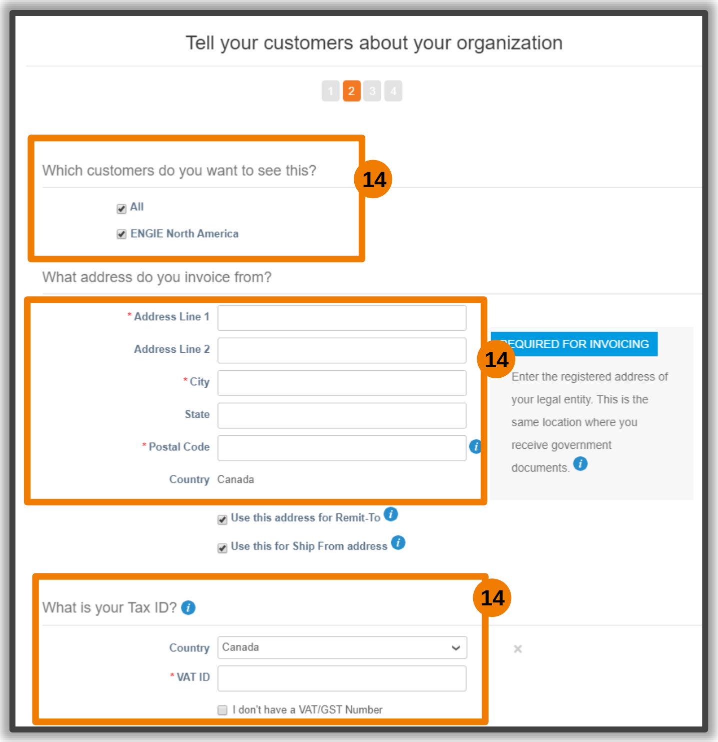
14 *On the Next Page:*

- *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***



15 *On the Next Page:*

Select from the drop-down:

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

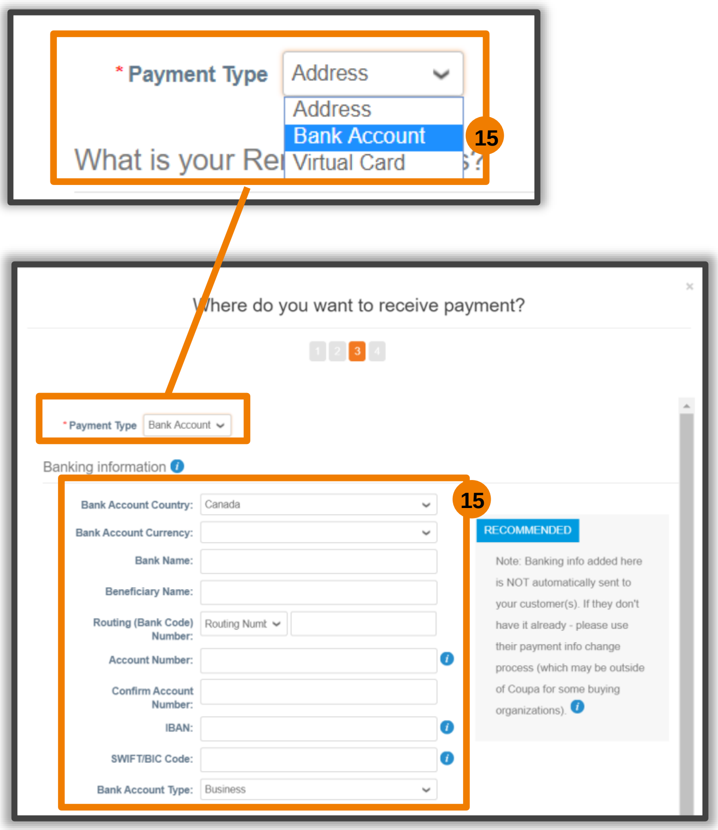
Populate the fields:

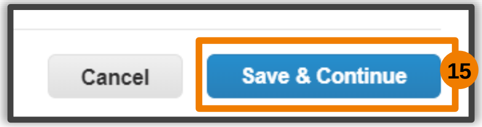
- ***Bank Account Name***
- ***Bank Account Number***
- ***Routing Number***

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

- ***Bank Country***

*Click **Save and Continue***

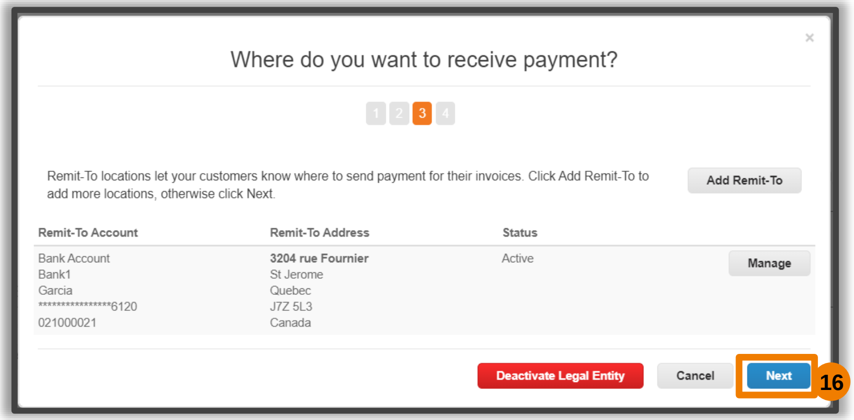


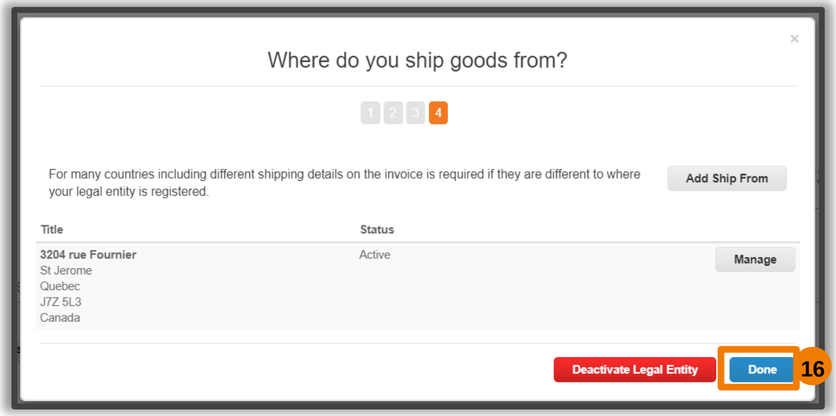


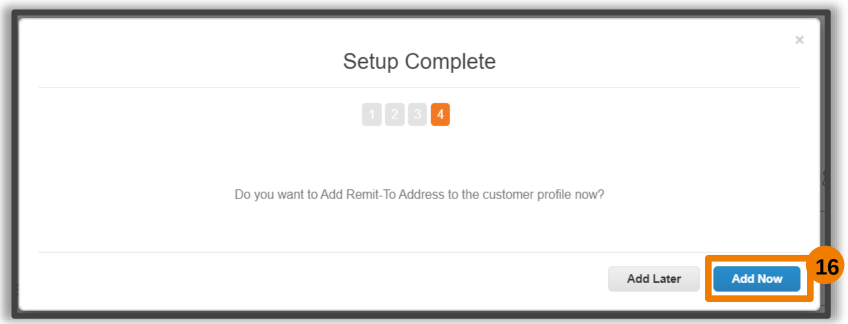
16 *On the Next Page:*

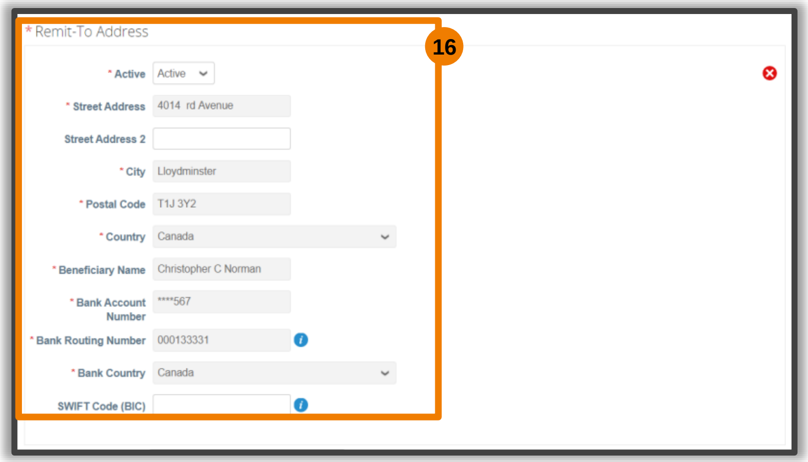
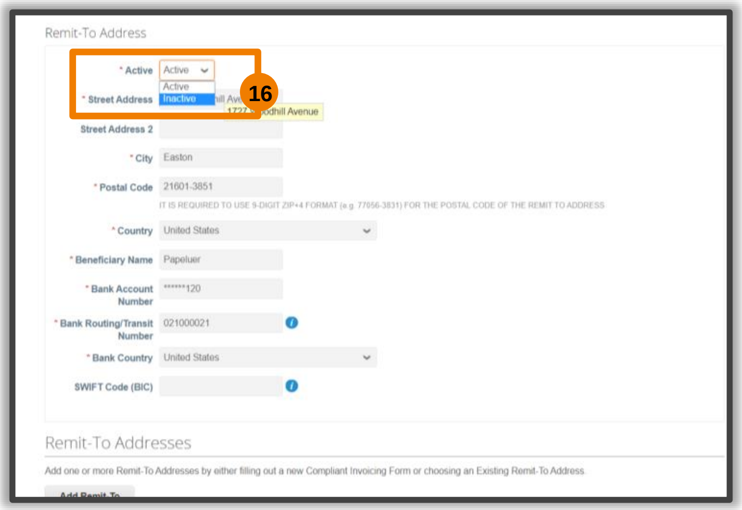
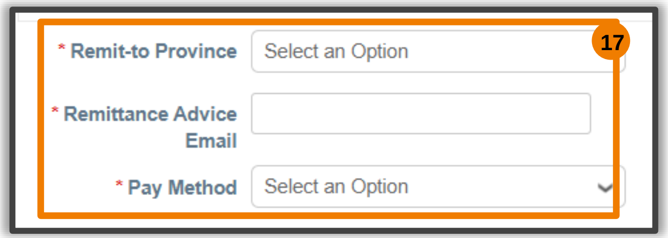
*Click **Next, Done** and lastly **Add Now***

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







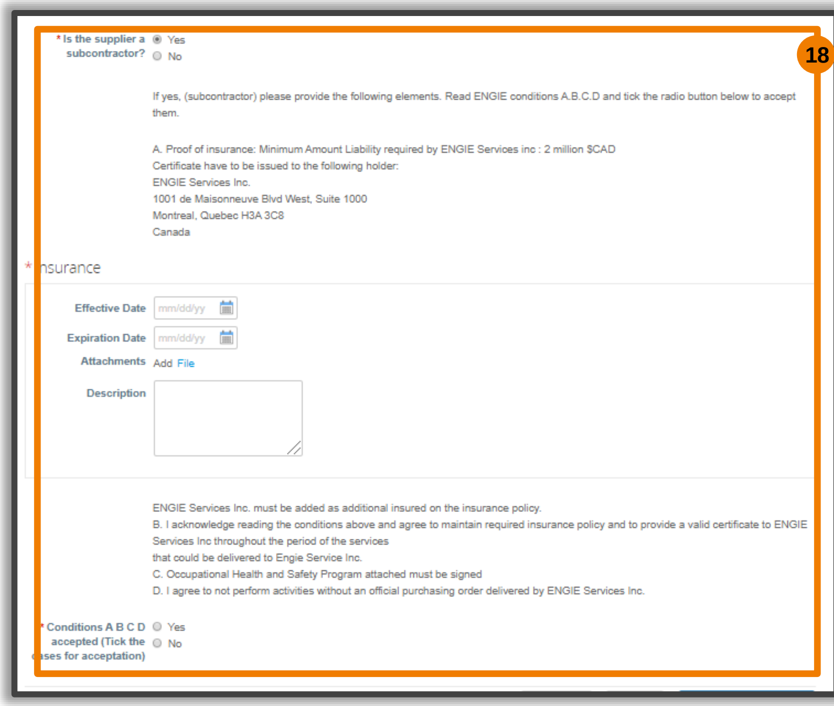
16 *If the **Choose** button is selected, the existing remit-to address will be adopted in the form:* • ***Only the fields without data will be editable***	
16 *If you have already an existing Remit to Address in your Engie North America profile and you wish to update it, deactivate the existing remit to address:* • ***Active:** Set to Inactive* *Then refer to Step 11 to 15 to create a new remit to address.*	
17 *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*	

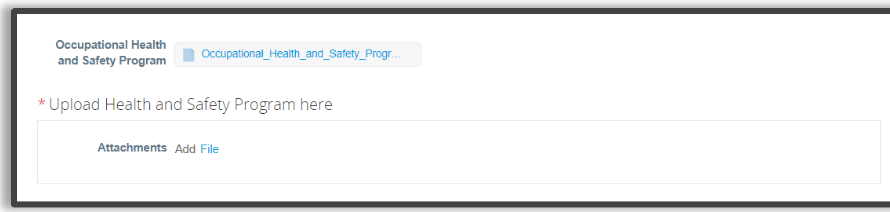
Subcontractor/Occupational Health and Safety Information Section (Canadian Suppliers)

This section is only for subcontractors.

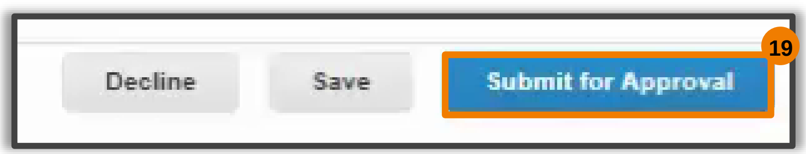
18 *Scroll-down to populate the mandatory fields*

- ***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.*





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

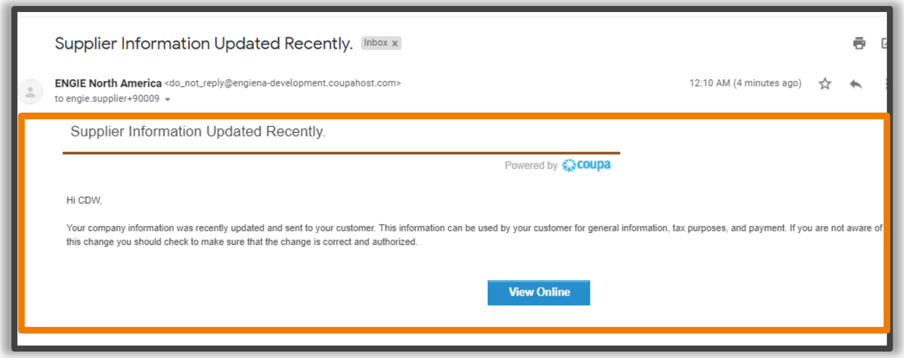


Supplier Data created or updated

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.
Inbox x
ENGIE North America <do_not_reply@engiena-development.coupahost.com>
to engie.supplier+90009
12:10 AM (4 minutes ago)
Supplier Information Updated Recently.
Powered by coupa
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.
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