

ERGO Supplier Registration

Department:	Procurement	Review Frequency:	Yearly
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1. Process of On-Boarding and Recertification

As an ERGO supplier, there are two ways to fill out your supplier self-assessment. One is by creating a Coupa Supplier Account or the other is to access the form directly on the website. Creating the account in the Coupa Supplier Portal (CSP) is strongly recommended, as this allows you to adapt the information submitted at any time and not requires you to enter your information again in case of necessary changes.

To do so, please select “**Join and Respond**” in our Email. If you do not wish to create an account with CSP, then you would need to click “**Respond without Joining**”

ERGO Technology & Services Pvt. Ltd.
 Procurement Team
 D-301, 3rd Floor, Eastern Business District
 LBS Marg, Bhandup (West) Mumbai
 400078 Mumbai City MH
 India

Join and Respond

Respond Without Joining

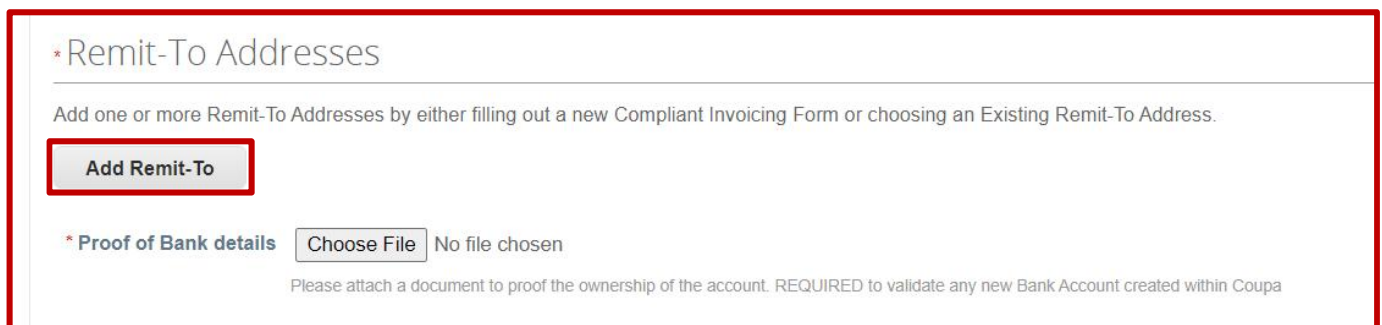
Overview of both options:

	Coupa Supplier Portal (Join and Respond)	Without Account (Respond without Joining)
Fully capture supplier information	Yes	Yes
Attach documents and certificates	Yes	Yes
Saving and editing again	Yes	No
Changing data already entered and submitted	Yes	No
Communicate within the form via "Comment" functionality	Yes	Restricted

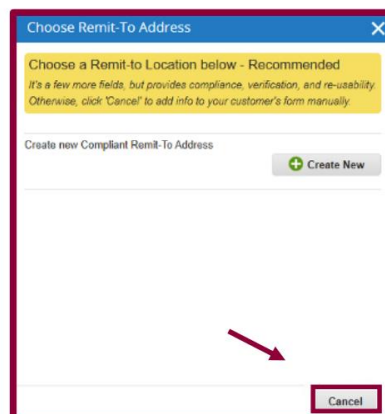
2. Adding Banking Details

Every ERGO Supplier must provide at least one set of Banking details within Coupa. These banking details will later be used for invoices submitted by you.

To do so, please click on “Add Remit-To”



For Coupa Supplier Portal (CSP) suppliers, a pop-up window will then appear. Please close this window by clicking on "Cancel". Non-CSP suppliers can simply ignore this step.



Please proceed by entering the banking information fields that are now available.

Bank Details

* Bank Name

* Bank Address

* Bank Postal Code

* Bank City

* Bank Country/Region

Bank Account Details

Please answer the following questions to identify the type of bank account that you want to add as a remit-to address:

* Type of Remit-to-Account

* Account Region Account OUTSIDE SEPA Countries
 Account IN SEPA Countries
When entering a remit-to IN SEPA Countries, it is required to enter IBAN and BIC. For all accounts outside the SEPA Region select "Account OUTSIDE SEPA Region".

* Bank account is registered in India? Yes
 No
Please choose the type of bank identifier code first to determine the required bank account detail fields.

* Beneficiary Name

* Bank Account Number i

* SWIFT Code (BIC) i
Please enter the SWIFT Code (or BIC for SEPA Countries) of the bank that hosts the account.

Bank Routing Number i
Please add the bank routing number if it is required in your region (e. g. US or Canada)

* IFSC (Indian Financial System Code) i

* Account Currency

* Proof of Bank details No file chosen
Please attach a document to prove the ownership of the account. REQUIRED to validate any new Bank Account created within Coupa

1

Type of Bank Account:

If you have a bank account that is registered in India, then select the “Account outside Single Euro Payment Area (SEPA)” and add IFSC number, Account Number as well as SWIFT Code.

2

Bank information:

When entering the bank information, please ensure that all fields are filled out and spelled correctly.

No spaces are allowed in the IFSC number. When copying your IFSC from another document, it may happen that you copy spaces (e.g. at the end of the number). In this case please remove the spaces.

3

Proof of ownership:

In order to verify the correctness of the bank information provided, we require proof of ownership. This proof can be a bank confirmation, a blank invoice, a copy of the bank statement or any other document providing the banking information.

* Remit-To Address

New Bank Account: Please keep in mind that only one single bank account per currency is to be added and that only one single bank account will be used for all payments to you!

Bank Details

* Bank Name

* Bank Address

* Bank Postal Code

* Bank City

* Bank Country/Region

4

4

Delete input mask:

If you have accidentally clicked on "Add Remit-to" several times or want to delete the bank details you have previously entered, please click on the cross highlighted in red.

3. Example of On Boarding or Recertification

Welcome to the ERGO Supplier Onboarding

Welcome to the ERGO Group AG supplier registration process. With 20 million customers, ERGO is one of the leading insurance groups in Germany. Outside Germany, ERGO is active in more than 30 countries, with a focus on private customer business. The focus of its international activities is on Europe and Asia. In Europe, ERGO is the market leader in health and legal expenses insurance; in its home market of Germany, ERGO is the leader in all insurance segments.

Please visit the ERGO Supplier Portal for further information, training materials and guidelines: <https://TOBEADDEDLATER>

1. Company Information

* Company Name Including full legal form.

* Primary Address

Country/Region	<input type="text" value="India"/>
Address Name	<input type="text" value="HQ"/>
Street Address	<input type="text" value="D-301, 3rd Floor, Eastern B"/>
Street Address 2	<input type="text" value="LBS Marg, Bhandup (West)"/>
City	<input type="text" value="Mumbai"/>
State Region	<input type="text" value="Maharashtra"/>
Postal Code	<input type="text" value="400078"/>
Location Code	<input type="text"/>
PO Box	<input type="text"/>
PO Box Postal Code	<input type="text"/>

Website

Please ensure the full legal name of your company is entered.

Please provide all relevant information for a clear identification and communication with your company. Mandatory are:


- Street Address
- Postal Code
- City
- Country

The Primary Contact will be our default contact in case of questions and communications with your company.

*** Primary Contact**

*** First Name**

*** Last Name**


*** Email Address** 

*** Primary Phone**
Country/RegionArea/City Local Extension (optional)
Including dial-through number

Mobile Phone
Country/RegionArea/City Local Extension (optional)

Central Company Number
Country/RegionArea/City Local Extension (optional)

Please provide us also with a dedicated email address for all purchase orders. If similar to the primary contact, please enter primary contact email details again. The accounting contact will be used for all accounting related transactions and questions.

*** Email for Purchase Orders** 
If you don't have a dedicated email account, please enter your own company email address

*** Add Accounting Contact** Yes No
Do you want to add an additional contact which will be used for all accounting related topics?

*** Accounting Contact First Name**

*** Accounting Contact Last Name**

*** Accounting / Remittance Email-Adresse**

Please provide PAN Number and your local tax ID (GST Number).

3. Company details

DUNS Number

* IT Products / IT Services Yes No
Are you going to supply IT Products or IT Services to ERGO?

3.1 Registration & Taxation Details

* Type of Firm
Please select the type of firm that applies

* Type of Business
Please select the type of business that applies

* Is the company registered and taxable in India?

Suppliers registered and taxable in India

* Is the company a Micro, Small or Medium Enterprise?

* PAN Number
Please enter your PAN (Permanent Account Number)

* Does the company name entered at the top of this form match with the name on the PAN Card? Yes No

* GST Vendor Classification
Please indicate if you are registered with GST

* GST ID
Kindly make sure that the GST ID is in accordance with the format provided by the Government of India (<https://www.gst.gov.in/>)

* Type of GST Integrated Goods and Services Tax (IGST)
 State Goods and Services Tax (SGST)
 Central Goods and Services Tax (CGST)
 Union Territory Goods and Services Tax (UTGST)
Please select all types of GST that apply

* GST Certificate Upload No file chosen

Please download and fill out the competency matrix if your company provides IT products or services.

Please upload the filled matrix using the upload functionality.

3. Company details

DUNS Number

*** IT Products / IT Services** Yes No
Are you going to supply IT Products or IT Services to ERGO?

Competency Matrix

Please submit the filled Competency Matrix ERGO_ETS...0.01.22.xlsx
Download the form above and edit it in excel or similar tools.

Please provide your companies turnover in INR. If your company did not exist and therefore not generate any turnover, please enter a "0".

Please attach a reliable financial statement. If you want to attach multiple documents, please use Zip. Please provide the number of employees of your company. If your company did not exist and therefore not employ any employees, please enter a "0"

3.2 Key Corporate Figures

3.2.1 Revenue / Turnover Information

* Year before last
In INR. If your company did not exist at that time please enter 0.

* Last year
In INR. If your company did not exist at that time please enter 0.

* Current year (projection)
In INR. If your company did not exist at that time please enter 0.

3.2.2 Financial Information

the company listed in Stock Exchange? Yes No

Please attach current financial information No file chosen
Financial Information such as Balance Sheets or Credit Reports - If multiple files are required please use a ZIP file.

3.2.3 Number of Employees

* Year before last
If your company did not exist at that time please enter 0

* Last year
If your company did not exist at that time please enter 0

* Current year

Please provide references relevant to future business transactions with ERGO Group.

3.3 References Relevant to ERGO (Optional)

In this optional section you can provide us with references that you want to share. Please indicate whether or not you want to add references with below radio buttons:

Do you want to add references? Yes No

3.3.1 Reference 1:

Company Name

Products / Services provided

Please provide context in regard to the products and/or services offered.

Volume

In INR

Beginning of offering

Date of contract signature

End of offering

Date of last business transaction

Reference / Recommendation Letter No file chosen

Please upload a corresponding reference or recommendation letter if available

The Primary Commodity Group will be used as an initial allocation for internal routing of your onboarding form.

3.4 Primary Commodity Group

Please select which commodity group best reflects the products you are providing. ERGO will use this information to route this form to a relevant buyer.

* Primary Commodity Group

- 1. IT & Telecoms
- 2. Mobility & Event Management
- 3. Facilities & Real Estate
- 4. Data & Online Services
- 5. Office Support & Services
- 6. BPO & Professional Services
- 7. Advertising & Communication
- EMD

* Please select payment method

Link to access required compliance documents

Please access the ERGO supplier portal and provide us with the following, signed documents. (Documents can be downloaded from the "Download Box" section on the homepage)

It is mandatory to provide at least one set of banking information.

Also, please make sure that the "proof of ownership" of the bank details is uploaded as well. This can be a bank confirmation, a blank invoice or a copy of the bank statement, cancelled cheque etc. or any other document.

* Proof of Bank details No file chosen

Please attach a document to prove the ownership of the account. REQUIRED to validate any new Bank Account created within Coupa

Please access the ERGO website as provided and download the relevant documents.

4. Quality Information & Compliance

4.1 Compliance

Link to access required compliance documents

Please access the ERGO supplier portal and provide us with the following, signed documents. (Documents can be downloaded from the "Download Box" section on the homepage)

* Non-Disclosure Agreement (NDA) No file chosen

* Confirmation of Compliance with the Principles of the Global Compact No file chosen

* Anti-Corruption Agreement No file chosen

Please upload the signed documents in the respective upload functions.

4.2 Certifications


In this section we are collecting information about your certification status, this includes certificates like ISO 9001, ISO 14001 or other certificate you would like to share with us.


Please indicate if you want to add certificates to your supplier with below radio buttons.

* Do you want to add Yes certificates? No

Please upload you certifications relevant to ERGO.

* ISO 9001


Effective Date 


* Expiration Date 

* Attachments [Add File](#)

Description

* ISO 14001

Effective Date 

* Expiration Date 

* Attachments [Add File](#)

Description

Please upload additional certificates such as REACH, RoHS or other Quality Assurance systems you might be certified in. Indicate the name of the certification in the description box (such as "REACH").

If your company is ISO 9001 or ISO 14001 certified, please upload your certificates including effective and expiration date.

These certificates are mandatory if required for the business relation with ERGO.

Please also upload any other certificate relevant for the business relationship with ERGO.

5. Other Information

* Does your company Yes
publish a sustainability No
report?

* Please include a copy

Effective Date

Expiration Date

Attachments [Add File](#)

Details / Description

Please add the sustainability report of your company if available.

If you are already an active supplier of any other Munich RE group company, please provide further details here.

* Previous experience Yes
with a company of No
Munich Re Group?

Have you previously done any work for any company within the Munich Re Group?

* Entity

For which entity/entities

* Year

By clicking on "Submit", your form will be sent to ERGO for review and internal processing.

After submitting, you will receive information about any change in status of your form (approved / rejected).

Here is room for any other remarks you wish to submit

[Decline](#) [Submit](#)