



Using Coupa Supplier Portal (CSP)

Coupa Platform

09.09.2022

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1 What is Coupa?

ERGO Group has chosen Coupa as its technology platform to optimise its procure-to-pay processes and enable the electronic transmission of orders and invoices. Coupa ...

... is a leading e-procurement platform that connects buyers with their suppliers.

... is an internet-based solution that can accommodate a variety of different systems (plug and play).

...is used by ERGO Group to request products and services, create and submit purchase orders and receive and pay invoices.

The Benefits

- Guaranteed delivery of invoices
- Better visibility and more straight-through processing
- Fewer exceptions, fewer calls/emails
- Higher chance of being paid on time
- Easier audits, better transparency
- Coupa billing channels are clearly defined so everyone knows their tasks
- Coupa takes suppliers worldwide to a new level of legal and commercial compliance

2 Register to CSP

It is mandatory that all suppliers connect to the Coupa platform. Each of the following steps must be completed before a supplier can properly interact with ERGO Group:

- Update contact information
- Invitation for the CSP aneheimen
- Manage and update account
- Exchange orders and invoices

1. You will receive an invitation e-mail to the Coupa Supplier Portal with the subject: **Reminder to complete your ERGO Group AG - Procurement - Beschaffung Registration - Action Required**

If you have not received an invitation e-mail, please send a request to supplier-registration@ergo.de.

2. Click **Join and Respond** to start the registration.
3. Enter a **Password**.
4. Confirm the password in the **Password Confirmation** field.
5. Activate the option **I accept the Privacy Policy and the Terms of Use**.
6. Click **Get Started**.

Email: 3

Password: 4
Use at least 8 characters and include a number and a letter.

Password Confirmation: 5
 I accept the Privacy Policy and the Terms of Use.

Continue next column ...

3 ... Register to CSP

7. Enter the link to your **Website**.
8. Select the country or region in the **Country/Region** field.
9. Enter your company address:
 - a. **Address Line 1** = Street and number
 - b. **Address Line 2** = Additional information about your address
 - c. **City**
 - d. **State** = Federal state (optional)
 - e. **Postal Code**
10. Click **Next** to continue.

Website: 7

* Country/Region: 8

* Address Line 1:

Address Line 2:

* City: 9

State:

* Postal Code:

11. Click **Next** without entering anything in the payment terms. These are maintained by Central Procurement of the ERGO Group.
12. Click the **Take Me There** to access the ERGO Group Central Procurement form.

You can then log in and change the language, if you scroll down to the bottom of the page.



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4 Manage your Coupa Account

Get an overview of your account on the **HOME** page.

1. Select the item you want to edit from the menu bar:



2. Click on the **USER NAME** to adjust the user settings.
3. Read your **NOTIFICATIONS** (optionally also as e-mail).



4. Click on **Improve Your Profile** to publish relevant information about your company on your profile.
5. Click **Request Merge** if you have multiple Coupa Supplier Portal accounts.
6. Click on the **USERNAME >**

Account Settings

7. Change your personal settings in the **User Details** section.
8. Click **Save**.
9. Change your **Current Password** in the **Change Password** section.
10. Click **Save**.
11. On the **Notification Preferences** page, you can select the notifications you want and the channel through which you want to receive notifications from Coupa. Select and click **Save**.

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Account Settings
Notification Preferences 11

5 Invite users

If desired, you can allow additional users to access your Coupa provider account to complete tasks with multiple staff.

1. Click **Setup** in the menu bar.

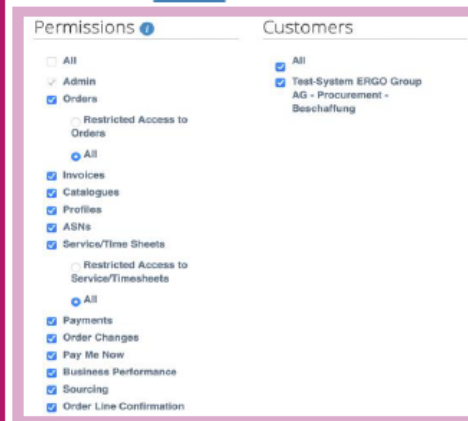


2. Click **Invite User**.
3. Enter the **First Name, Last Name, Email** of the person you would like to invite.
4. Click **Send Invitation**.

After you have sent the invitation, the employee will receive an email notification with a link to register. Click on **Join Coupa** to accept the invitation.

Setup Customise Permissions

5. Click **Edit**.
6. Adjust the permissions.
7. Click on **Save**.

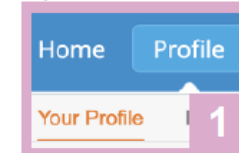


6

6 Profiles in Coupa

In general, there are two different profiles:

> Public profile

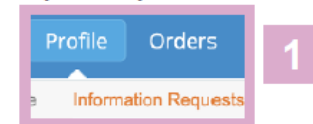


1. Select **Profile > Your Profile**.
2. Click on **Set up** and complete the information of your public profile in the **Profile Level** section.
3. Click **Edit Section**.
4. Enter the information.
5. Click on **Save changes**.
6. Repeat these steps for each section.

Only the information contained in the ERGO Group customer profile is transferred to the ERGO Group system.

> Customised company profile

1. Select **Information Request** in your **Profil**.



2. Click **Withdraw**.
3. Customise your data.



4. Click **Submit for Approval** to allow your client to review and approve the data again.

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7 Supplier Certification

If you are not yet certified as a ERGO Group supplier, you have to start the certification process:

1. Login to the Coupa Supplier Portal.
2. Click on the **Test-System ERGO Group AG - Procurement - Beschaffung** link in the Recent Customers section to complete the registration process.

Latest Customers

[Test-System ERGO Group AG - Procurement - Beschaffung](#)

3. Fill in the information of the ERGO Group supplier registration.

1. Company Information

* Company Name: Supplier Onboarding Ltd.

* Primary Address: [including full legal form]

Country/Region: United States

Address Name: []

4. Click **Submit for Approval** when all details, including bank information (8-10 Enter Bank Information), are complete in Coupa.

Overview
Profile Setup

Welcome! Do we have your details right?

Your profile helps you get discovered by buyers spending billions of dollars every year. To save you time, we have pre-filled your profile with publicly available data on your company. You can always edit, add or remove your information in your profile at any time.

Learning Center
Add more questions
Create or deactivate profile

Year Established: 2015

Feedback

Skip for Now Update Profile

8 Enter Bank Information

1. Click on **Add Remit-To**.
The bank account wizard opens in the foreground.

2. Click **+ Create New Remit-To Address**.
3. Enter the name of the company in the **Legal Entity Name** field.
4. Select your **Country/Region**.

* Legal Entity Name: Supplier Onboarding Inc.

Country/Region: United Kingdom

5. Click **Continue**.
6. Indicate the **Type of Company**.
7. Enter the name of the **Board of Directors**.

* Legal Entity Name: Supplier Onboarding Ltd.

Country/Region: United Kingdom

* Type of Company: Limited

Board of Directors: Max Powers

8. Click **Save & Continue**.
9. Enter the street and house number or the post office box in the **Address Line 1** field.
10. Enter the **City**.
11. Enter the **Post Code**.

* Address Line 1: 35 Queens Lane

Address Line 2: []

* City: London

State: []

* Post Code: SE1 5SG

Continue next column ...

9 ... Enter Bank Information

12. Enter the **VAT ID**.

What is your Tax ID? *i*

Country/Region: United Kingdom

* VAT ID: GB123456789

I don't have a VAT/GST Number

13. Click **Save & Continue**.

Click on the blue *i* to display the help texts and explanations for each field.

14. Select the **payment method**, e.g. *bank account*.

* Payment Type: Bank Account

15. Enter the **Name of the Bank**.
16. Enter the **Account Number** and confirm the **Number in the Confirm Field**.

Bank Name: Bank of England

Account Number: 12345678

Confirm Account Number: 12345678

Sort Code: 101499

17. Click **Save & Continue**.
18. Click **Next** if the data is correct and you do not want to create another payee.
19. Click **Done** if you do not want to add another return address for deliveries.
20. Click **Add Now** to complete the process and add the bank details to the registration.

Continue next column ...

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10 ... Enter Bank Information

The bank details are now entered with all data.

21. **Optional:** Click **Add Remit-To** if you want to add more payees and then follow the instructions from **8 Enter Bank Information**.
22. Click **Yes, Save to Profile** to complete the supplier registration.

Continue with the instructions from **7 Supplier Certification**.

Click **Submit for Approval** when all details, including bank information, are complete in Coupa.



You will also receive an email confirming that the supplier registration has been sent for approval.

11 Support

This Quick Reference Card can only give you an overview of the most important steps in the Coupa Supplier Portal. Further information can be found on our website

You will find much more information on the Coupa website: The Coupa Success Portal for additional information, videos and help: <https://success.coupa.com>

Coupa Supplier Portal
Login: <https://supplier.coupahost.com>

If you have any questions, please contact your ERGO Group buyer or the following mailbox sm-etspl-supplier.coupa@ergo.com

Thank you very much!
Your **ERGO Procurement Team**

Thank you!

For more information you can find us here:

sm-etspl-supplier.coupa@ergo.com