

**ERGO**

A Munich Re company

# Guidelines for Suppliers of the ERGO Group

**1** Start Using Coupa Supplier Portal (CSP)

March 2022

# Dear Suppliers!

**ERGO**

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We look forward to taking a new approach to manage procurement with you. With the introduction of the cloud-based platform Coupa, the Corporate Procurement department is transforming ERGO Group's procurement and digitises all associated processes, from ordering to payment.

You, as a supplier, benefit from this new approach and so do we, as your customer.

We are happy to assist you with the integration of the electronic procurement solution. We look forward to a digitised collaboration with you!

With kind regards  
Your ERGO Procurement Team



# Start Working with the Coupa Supplier Portal (CSP) Available Guidelines

Not yet experienced in setting up, using and integrating Coupa into your order and invoicing processes? To support you, we provide the following documents and instructions. All documents are available on our [Internet Page](#).

<b>1</b> Start Using CSP: Get Registered and Certified	<b>2</b> Understand eInvoicing with ERGO Group	<b>3</b> Manage Purchase Orders, Invoices and Credit Notes with CSP
<ul style="list-style-type: none"><li>• Introduction to Coupa and the Coupa Supplier Portal</li><li>• Register to CSP</li><li>• Manage your CSP-account</li><li>• Conduct ERGO supplier certification</li></ul>	<ul style="list-style-type: none"><li>• Advantages</li><li>• Transmission methods for eInvoicing</li><li>• Overview:<ul style="list-style-type: none"><li>• CSP</li><li>• SAN</li><li>• cXML</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Purchase Orders</li><li>• Invoices</li><li>• Credit notes</li></ul>
Current document		

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1.1

# Introduction to Coupa



# Introduction to Coupa

## 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.
- Coupa is an internet-based solution that can accommodate a variety of different systems (plug and play).
- The Coupa Supplier Portal is used by ERGO Group to request products and services, to create and transmit orders and to receive and pay invoices.

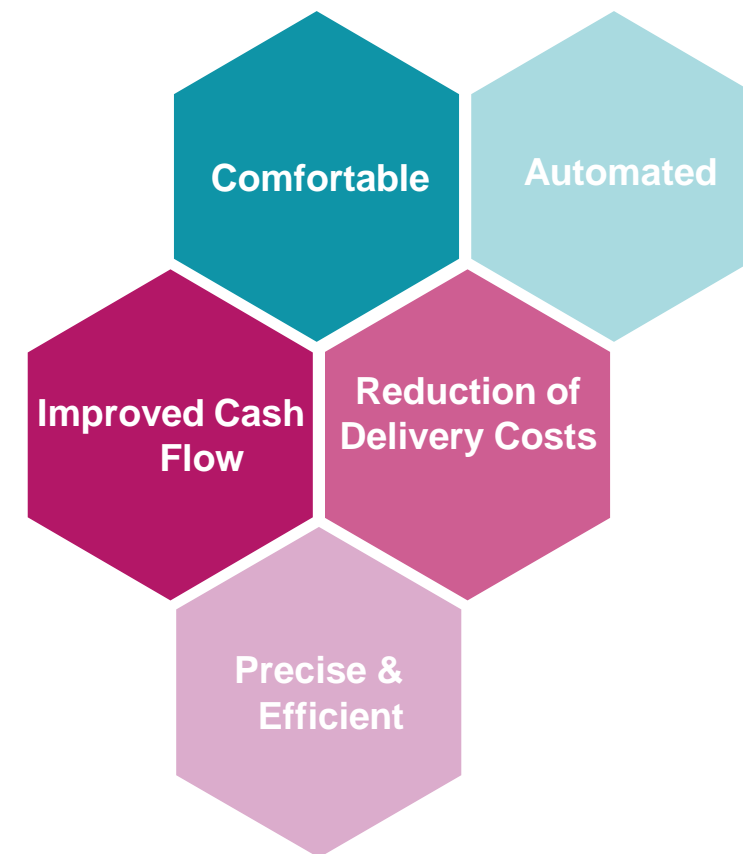


# Introduction to Coupa

## What is Coupa?

By working electronically with ERGO Group, you increase the efficiency of your order taking, reduce errors and delays in order fulfilment and can achieve a better presence with ERGO Group.

- Better **control over** order processing.
- The ability for all suppliers to create **electronic invoices** improves the efficiency and quality of transactions.
- **Better communication and visibility** at ERGO Group.
- Improved targeted purchases for users to accelerate spending with **preferred suppliers**.
- Better quality and **faster invoice payment** with convenient visibility of the status of your invoices.
- **No installation of** hardware or software required.
- Web applications that are **quick to set up and easy to use**.
- Increase in automation.
- Best of all, it's **free!** There are no costs for suppliers when they use the Coupa Supplier Portal.



# Introduction to Coupa

## What are the Benefits?

One of the most important questions asked by the suppliers is

**"When do I get paid?"**

What follows is often a long exchange between you and the ERGO Group:

- Which bill are you talking about?
- When did you send it?
- How did you send it?
- I have not received it!
- I found it but it lacks information so I can't pay for it!

This is frustrating and expensive for both parties!

Coupa enables suppliers to create legally compliant electronic invoices in their country of origin.

Coupa audits and implements invoices in accordance with all applicable laws, which go far beyond the tax requirements.

Coupa makes every effort to provide high quality data by taking structured data directly from the source instead of using other sources (e.g. scanning paper):

- 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 that everyone knows their tasks

With  , those conversations are a thing of the past!



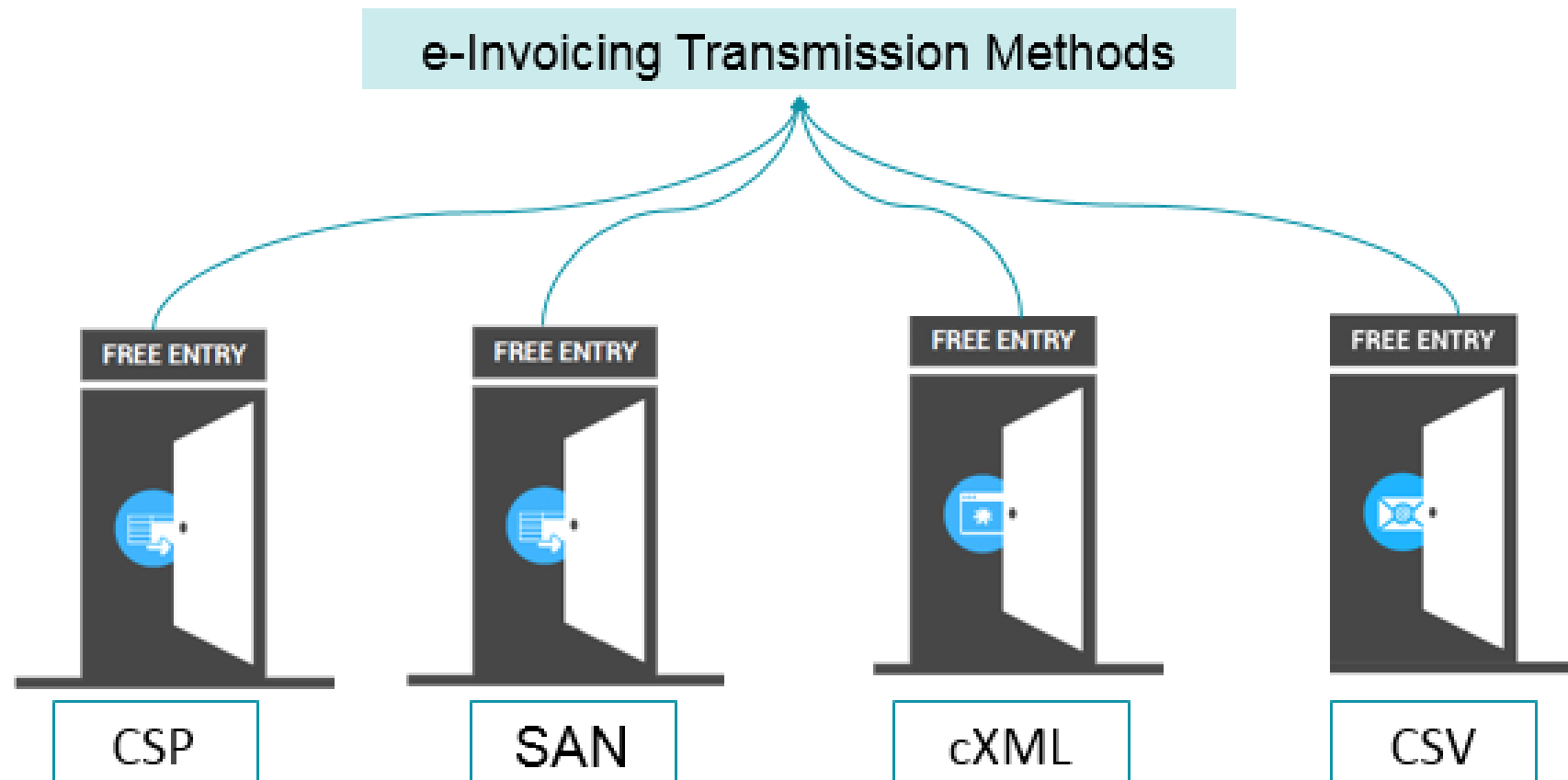
# Introduction to Coupa

## What are the Benefits?

They are the most important part of this project! Supplier involvement is key to the success of the project. Therefore, you will receive support with requirements arising from electronic processing if needed.

- Coupa takes suppliers worldwide to a new level of legal and commercial compliance
- Coupa can support you in this:
  - Push legally required data fields per country (tax and trade laws)
  - Apply population rules to ensure the presence of data (line descriptions, VAT IDs, etc.)
  - Apply validation rules to check the accuracy of the data where possible
  - Enables immediate correction of invoice data in case of errors
  - Use of state-of-the-art digital signatures in accordance with locally applicable laws
  - Coupa stores all legal and compliant electronic invoices in the Coupa Supplier Portal, where suppliers can view and download them.

# Introduction to Coupa eInvoicing Methods



# Introduction to Coupa Suppliers: Basic Understanding

After reading this documentation, you will have gained a basic understanding of the Coupa system and its implementation at ERGO Group.

You will be able to ...

- ... register on the Coupa Supplier Portal and set up your profile.
- ... know the basic navigation in the Coupa Supplier Portal.
- ... to display and manage via the Coupa Supplier Portal
- ... create invoices/credit notes within the Coupa Supplier Portal via the **PO flip** function.

# Introduction to Coupa

## What Changes?

- ERGO Group is in the process of rolling out Coupa worldwide.
- Go Live for Germany was 01.11.2021 for orders, invoices from 01.01.2022.
- Coupa is currently being introduced in Belgium, Poland and India. Other countries are in the pipeline.
- Orders sent from Coupa will be named with a 10-digit number always starting 49, e. g. 4900001317 (the purchase order number) and will require the invoice to be submitted via Coupa under the new electronic invoicing process.
- All incoming orders that do not start 49 should be processed according to **current** procedures.



**Please note: Invoices submitted must quote the correct purchase order number**

1.2

# Register to Coupa Supplier Portal (CSP)



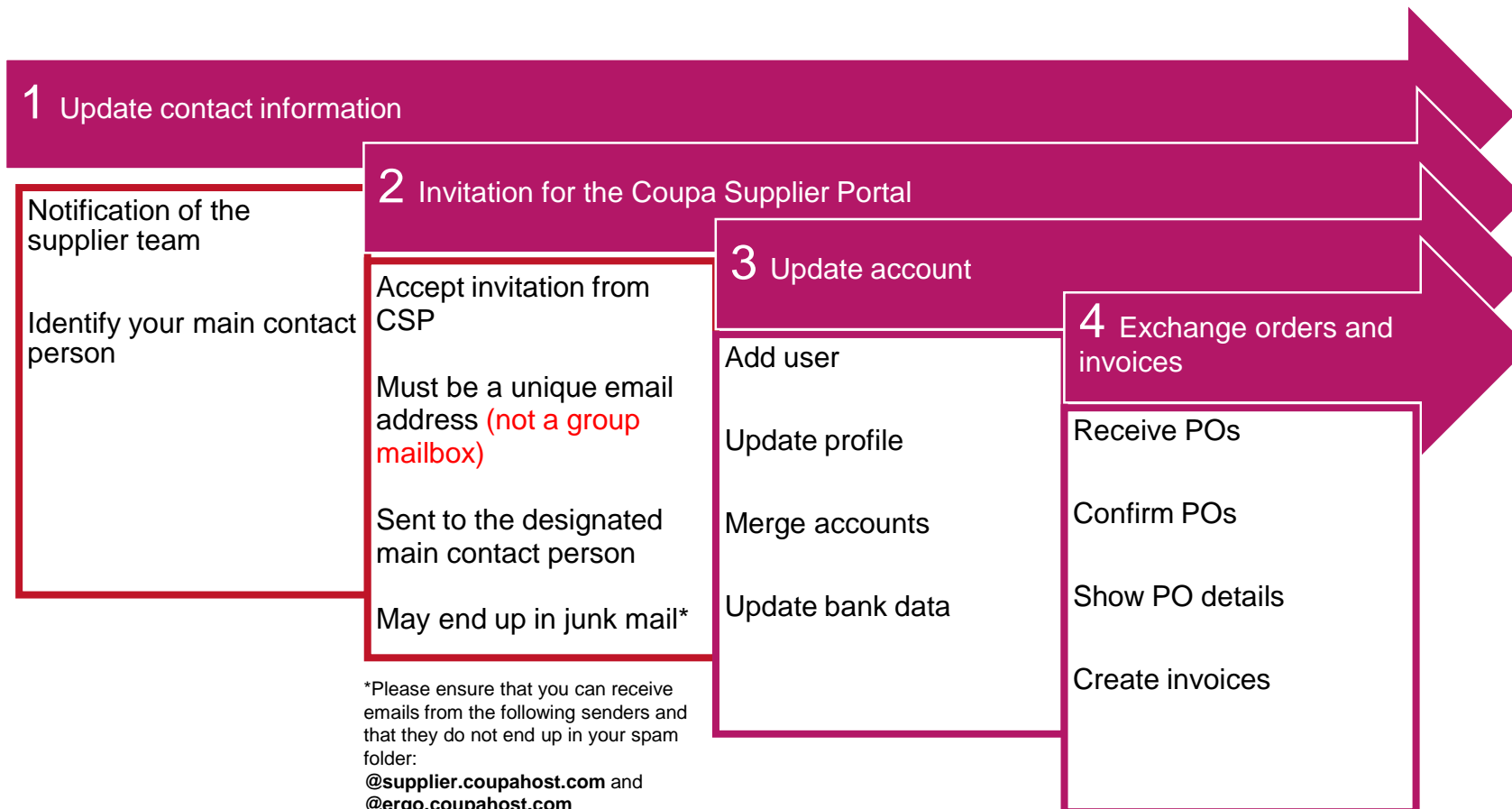
# Register Transactions in Coupa via CSP

With the help of Coupa, suppliers can quickly receive and confirm orders and create electronic invoices via an online platform. As a supplier, the following functions are available to you:

1. Manage your company information
2. Configure your PO and invoice transfer settings
3. Create an online catalogue
4. View all your orders
5. Create and manage the invoices to the ERGO Group

# Register Connection to ERGO Group via Coupa

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

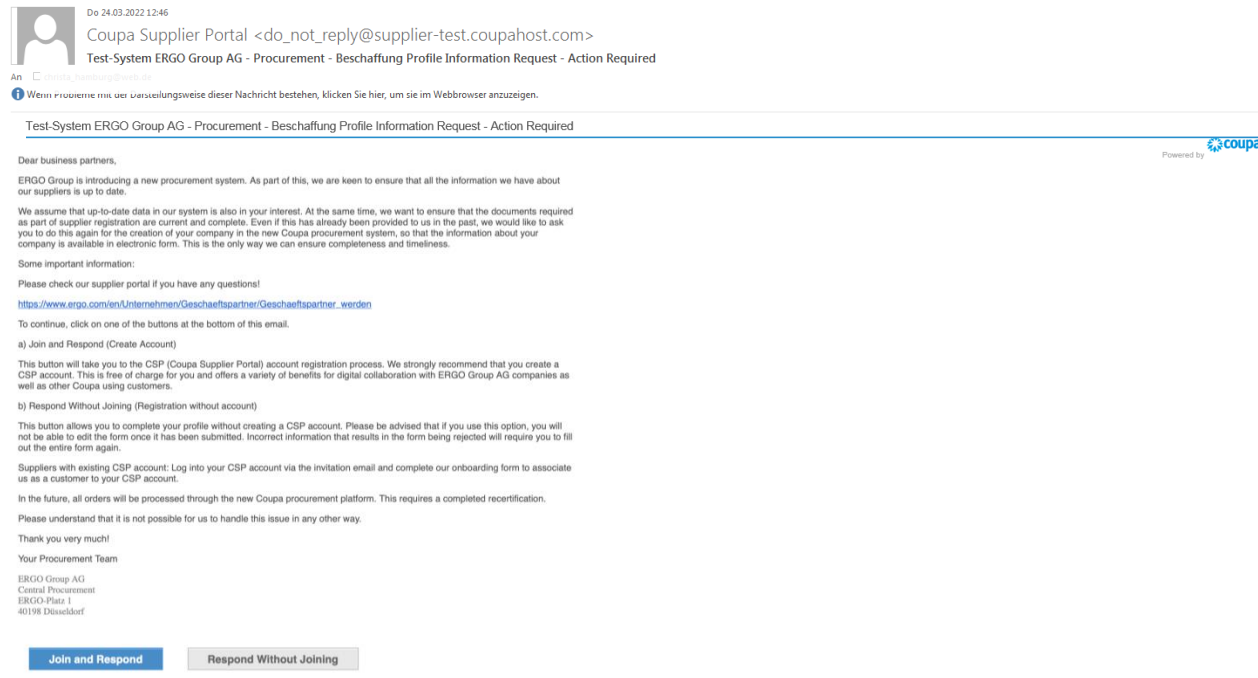


# Register



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## 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**



Please note that the Coupa Supplier Portal is a software provided by Coupa.

The ERGO Group has no influence on the functionality, appearance or language of this user interface.



If you have not received an invitation e-mail, please send a request to [supplier-registration@ergo.de](mailto:supplier-registration@ergo.de).



# Register



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## 2. Click the **Join and Respond** button to start the registration.

Do 24.03.2022 12:46  
Coupa Supplier Portal <do\_not\_reply@supplier-test.coupa.com>  
Test-System ERGO Group AG - Procurement - Beschaffung Profile Information Request - Action Required

An ...@hamburg.de

Wenn Probleme mit der Darstellungsweise dieser Nachricht bestehen, klicken Sie hier, um sie im Webbrowser anzuzeigen.

Test-System ERGO Group AG - Procurement - Beschaffung Profile Information Request - Action Required

Dear business partners,

ERGO Group is introducing a new procurement system. As part of this, we are keen to ensure that all the information we have about our suppliers is up to date.

We assume that up-to-date data in our system is also in your interest. At the same time, we want to ensure that the documents required as part of supplier registration are current and complete. Even if this has already been provided to us in the past, we would like to ask you to do this again for the creation of your company in the new Coupa procurement system, so that the information about your company is available in electronic form. This is the only way we can ensure completeness and timeliness.

Some important information:

Please check our supplier portal if you have any questions!  
[https://www.ergo.com/en/Unternehmen/Geschaeftspartner/Geschaeftspartner\\_werden](https://www.ergo.com/en/Unternehmen/Geschaeftspartner/Geschaeftspartner_werden)

To continue, click on one of the buttons at the bottom of this email.

a) **Join and Respond (Create Account)**

This button will take you to the CSP (Coupa Supplier Portal) account registration process. We strongly recommend that you create a CSP account. This is free of charge for you and offers a variety of benefits for digital collaboration with ERGO Group AG companies as well as other Coupa using customers.

b) **Respond Without Joining (Registration without account)**

This button allows you to complete your profile without creating a CSP account. Please be advised that if you use this option, you will not be able to edit the form once it has been submitted. Incorrect information that results in the form being rejected will require you to fill out the entire form again.

Suppliers with existing CSP account: Log into your CSP account via the invitation email and complete our onboarding form to associate us as a customer to your CSP account.

In the future, all orders will be processed through the new Coupa procurement platform. This requires a completed recertification. Please understand that it is not possible for us to handle this issue in any other way.

Thank you very much!

Your Procurement Team

ERGO Group AG  
Central Procurement  
ERGO Platz 1  
10509 Berlin

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**> If you are not the right person or you want someone else to sign up instead, you can forward the invitation later.**

# Register

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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 the **Get Started** button.

## Create your business account

Test-System ERGO Group AG - Procurement - Beschaffung is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Test-System ERGO Group AG - Procurement - Beschaffung so you're ready to do business together.

Email

Password  **3**  
Use at least 8 characters and include a number and a letter.

Password Confirmation  **4**

I accept the [Privacy Policy](#) and the [Terms of Use](#). **5**

**6**

[Having an issue with signup?](#)

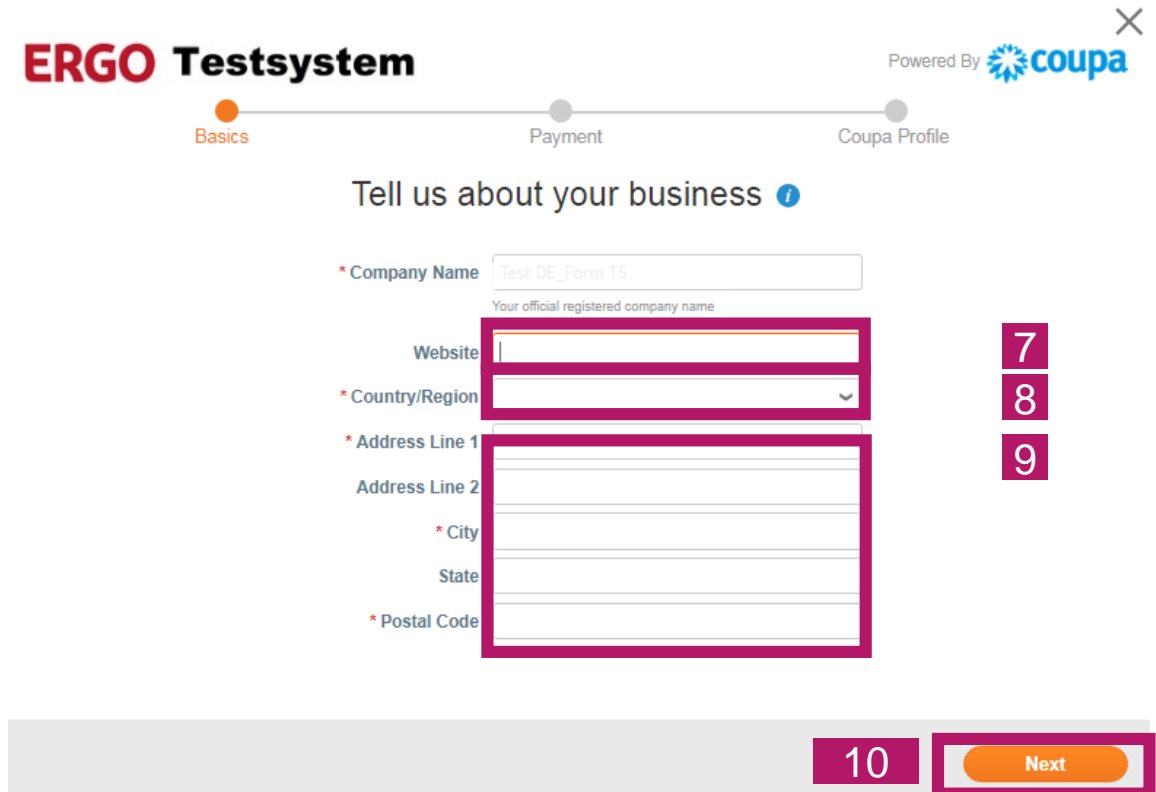
**Tip**

## Tip


If you are not the right person, you can forward the invitation to the appropriate person.

# Register


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 house 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.



ERGO Testsystem

Powered By 

Basics Payment Coupa Profile

Tell us about your business 

\* Company Name   
Your official registered company name

Website

\* Country/Region

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

7

8

9

10

Next

# Register



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11. Click **Next** without entering anything in the payment terms. These are maintained by Central Procurement of the ERGO Group.

ERGO Testsystem Powered By coupa

Basics Payment Coupa Profile

Would you like to offer discounts to get paid faster? ⓘ

🏠 Payment Discount Preferences

Your default payment term

- Net 30 ▶
- Net 45 ▶
- Net 60 ▶
- Net 75 ▶
- Net 90 ▶
- Net 120 ▶

Automatically replace with this discount (you can change this later)

- ▼
- ▼
- ▼
- ▼
- ▼

Use these preferences for all your customers

Back

11

Next

# Register



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12. Click the **Take Me There** button to access the ERGO Group Central Procurement form.

**ERGO Testsystem** Powered By

Basics Profile

You are one step away from doing business with Test-System ERGO Group AG - Procurement - Beschaffung !

Test-System ERGO Group AG - Procurement - Beschaffung requires some additional information

12 [Take Me There](#)

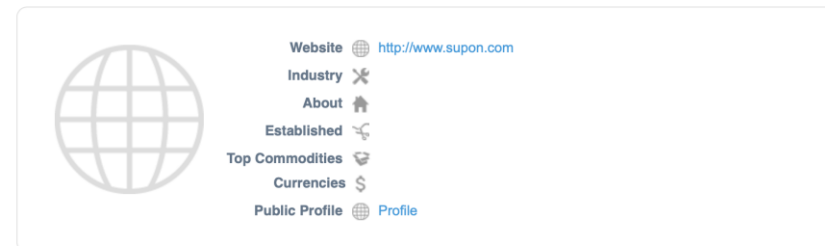
# Register

## Optional: Adjust Language Settings

You can customise the language for the Coupa Supplier Portal.

1. Login to the Coupa Supplier Portal.
2. Scroll to the bottom of the page.
3. Select the desired language, e.g. *German (Germany)* or *English (UK) (United Kingdom)*.

Supplier Onboarding Ltd.



A screenshot of a supplier profile page for 'Supplier Onboarding Ltd.'. On the left is a globe icon. To its right is a list of links: 'Website' with a globe icon and URL 'http://www.supon.com', 'Industry' with a crossed wrench icon, 'About' with a house icon, 'Established' with a calendar icon, 'Top Commodities' with a shopping cart icon, 'Currencies' with a dollar sign icon, and 'Public Profile' with a globe icon and the word 'Profile'.

Test-System ERGO Group AG - Procurement - Beschaffung



A screenshot of the footer of the Coupa Supplier Portal. It features the Coupa logo (a gear icon) and the text 'coupa Business Spend Management'. Below this is a language selection menu with 'English (UK)' highlighted in a red box, and a red box containing the number '3'. At the bottom, it says '© 2006-2022 Coupa Software Incorporated' and 'Privacy Policy · Terms of Use'.

# Thank you very much!

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Are you already certified with ERGO Group? If so, proceed, if not continue on page

[42 Conduct ERGO supplier certification](#)



1.3

# Manage your Coupa Account





# Manage your Account Overview

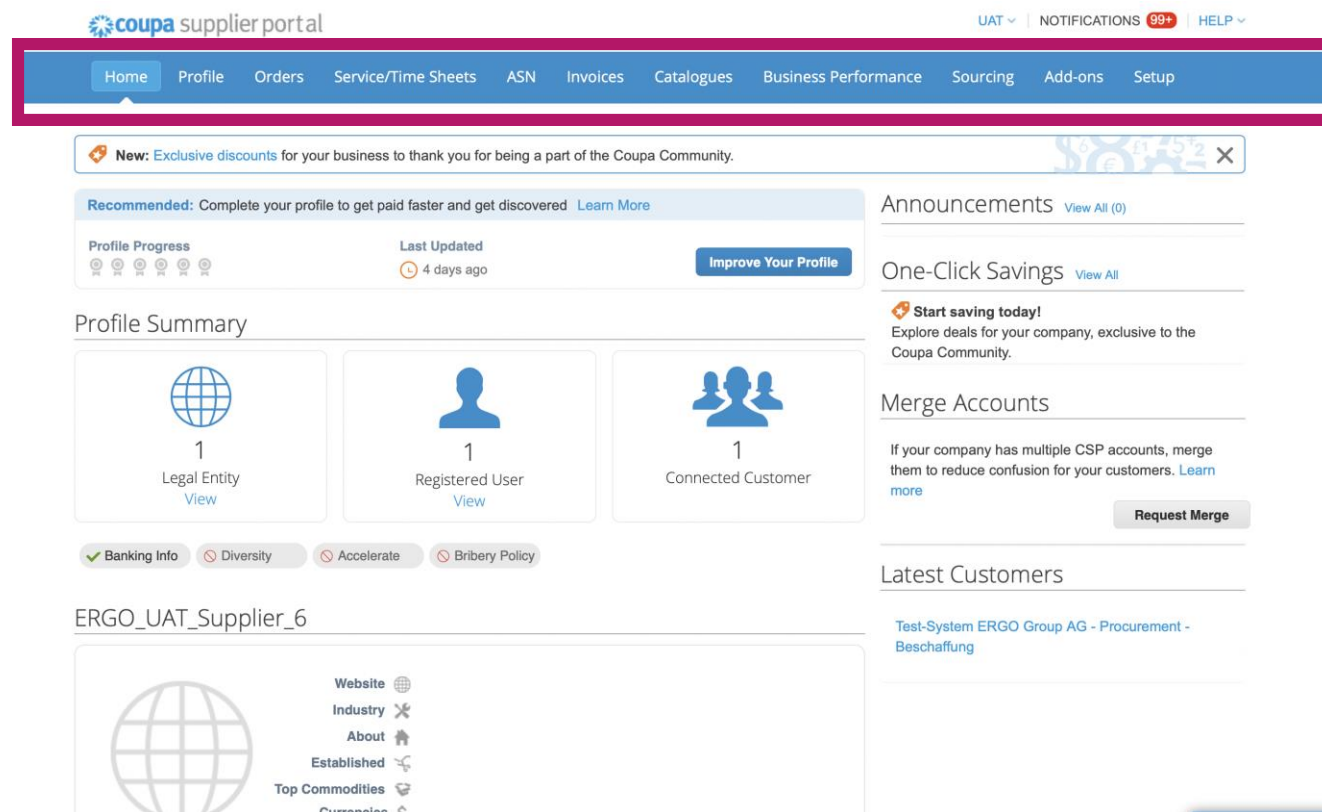


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Get an overview of your account on the **HOME** page.

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

- a. **Home** = Homepage and Profile overview
- b. **Profile** = access to public and client profiles
- c. **Orders** = Manage customer orders
- d. **Service/Time Sheets**
- e. **ASN**
- f. **Invoices** = Manage your customer invoices
- g. **Catalogues**



1

# Manage your Account Overview



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- h. Business Performance
- i. Sourcing
- j. Add-ons
- k. Setup = Customise your account and manage administration

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The 'Business Performance' menu item is highlighted. In the top right corner, there are links for 'UAT', 'NOTIFICATIONS 99+', and 'HELP'. Below the navigation bar, a notification banner reads: 'New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.' Below this, a 'Recommended' section suggests: 'Complete your profile to get paid faster and get discovered. Learn More'. A 'Profile Progress' section shows five progress indicators, with the last one updated '4 days ago' and a button to 'Improve Your Profile'. The 'Profile Summary' section contains three cards: '1 Legal Entity View', '1 Registered User View', and '1 Connected Customer View'. Below these cards are tags for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The main content area is titled 'ERGO\_UAT\_Supplier\_6' and features a globe icon and a list of links: Website, Industry, About, Established, Top Commodities, and Currencies. On the right side of the interface, there are sections for 'Announcements View All (0)', 'One-Click Savings View All', 'Start saving today! Explore deals for your company, exclusive to the Coupa Community.', 'Merge Accounts' (with a 'Request Merge' button), and 'Latest Customers' (listing 'Test-System ERGO Group AG - Procurement - Beschaffung').

1

# Manage your Account Overview



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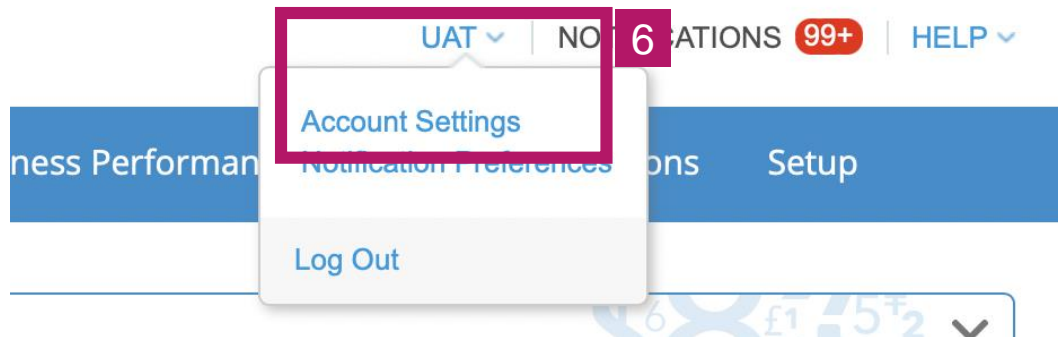
2. Click on the **USER NAME** to adjust the user settings.
3. Read your **NOTIFICATIONS** (optionally also as e-mail).
4. Click on **Improve Your Profile** to publish relevant information about your company on your profile.
5. Click the **Request Merge** button if you have multiple Coupa Supplier Portal accounts.

The screenshot shows the Coupa Supplier Portal interface. At the top right, there are three callouts: '2' pointing to the user name 'UAT', '3' pointing to the 'NOTIFICATIONS 99+' button, and '4' pointing to the 'Improve Your Profile' button. Below the navigation bar, there is a 'Profile Progress' section with a '4' callout pointing to the 'Improve Your Profile' button. The 'Profile Summary' section shows '1 Legal Entity', '1 Registered User', and '1 Connected Customer'. Below this, there are callouts for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. At the bottom, there is a section for 'ERGO\_UAT\_Supplier\_6' with a '5' callout pointing to the 'Request Merge' button. The right sidebar contains sections for 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'.

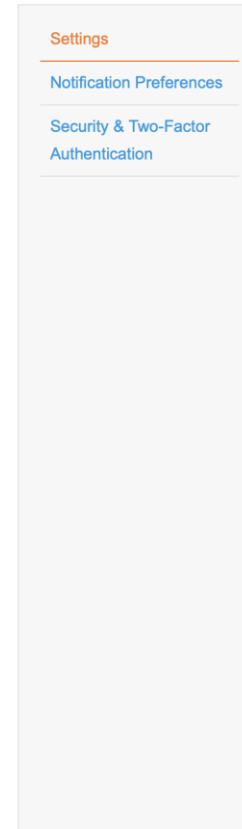
# Manage your Account

## User Settings: Account Setting + Password

6. Click on the **USER NAME > 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**.



### My Account Settings



### User Details

A screenshot of the 'User Details' form. The fields are: 'First Name' (UAT), 'Last Name' (ERGO\_UAT\_Supplier\_6), 'Email' (ergosuppliers+ERGO\_UAT\_Supplier\_6@gmail.com), 'Department' (Sales), and 'Role' (Sales Manager). A red box highlights the entire form area, labeled '7'. A 'Save' button is highlighted with a red box and labeled '8'.

### Change Password

A screenshot of the 'Change Password' form. The fields are: 'Current Password', 'Password', and 'Password Confirmation'. A red box highlights the entire form area, labeled '9'. A 'Save' button is highlighted with a red box and labeled '10'.

# Manage your Account

## User Settings: Manage Notifications

On the **Notification Settings** page, you can select the notifications you want and the channel through which you want to receive notifications from Coupa:

- Online: Notifications in the CSP - recommended,
- E-mail - recommended or
- SMS\* (short message)

\* SMS: You can choose to receive notifications in the form of short text messages if you have an SMS-enabled device and confirm your phone number. SMS notifications are turned off by default. Your choice of SMS notifications will be deleted when you deactivate your mobile phone check. You can verify your mobile phone to receive SMS notifications on the Security and Two-Factor Authentication page).

# Manage your Account

## User Settings: Manage Notifications

- 12. Click on your **USER NAME** > **Notification Preferences**.
- 13. In the **Notification Preferences**, select what you would like to be informed about and by which channel.
- 14. Click **Save** to confirm your settings.

### My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Announcements	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Business Performance			
Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogues			
Catalogue about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
New comment received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Coupa Accelerate			
New Early Pay Customer	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

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UAT | NOTIFICATIONS 99+ | HELP

Account Settings

Notification Preferences

Log Out

Terms of Use	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Users			
A new customer connection created	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Service/Time Sheets			
A Service/Time Sheet is rejected	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A Service/Time Sheet is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

14 Cancel Save

# Manage your Account

## Invite Users (1/3)



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

You can manage user permissions and access by assigning certain users to specific clients only and restricting what types of documents they can access and what functions they can perform on their assigned clients.

## 1.2 Guideline for ERGO Group Suppliers on the Use of the Coupa Supplier Portal (CSP)

# Manage your Account Invite Users (2/3)

# ERGO

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

21. Click **Invite User**.

22. Enter the **First Name**, **Last Name**, **Email** of the person you would like to invite.

23. Click **Send Invitation**.

### Invite User

First Name

Last Name

\* Email

Permissions ? Customers

- All
- Admin
- Orders
- Restricted Access to Orders
  - All
- Invoices
- Catalogues
- Profiles
- ASNs
- Service/Time Sheets
- Restricted Access to Service/Timesheets
  - All
- Payments
- Order Changes
- Pay Me Now
- Business Performance
- Sourcing
- Order Line Confirmation

Customers

- All
- Test-System ERGO Group AG - Procurement - Beschaffung

Cancel

coupa supplier portal

UAT | NOTIFICATIONS 99+ | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-on **Setup**

Admin Customer Setup Connection Requests

### Admin Users

Users	Permissions	Customer Access
Neur Nutzer ergosuppliers+NeuerNutzer@gmail.com Status: Deactivated	Invoices Orders	Test-System ERGO Group AG - Procurement - Beschaffung



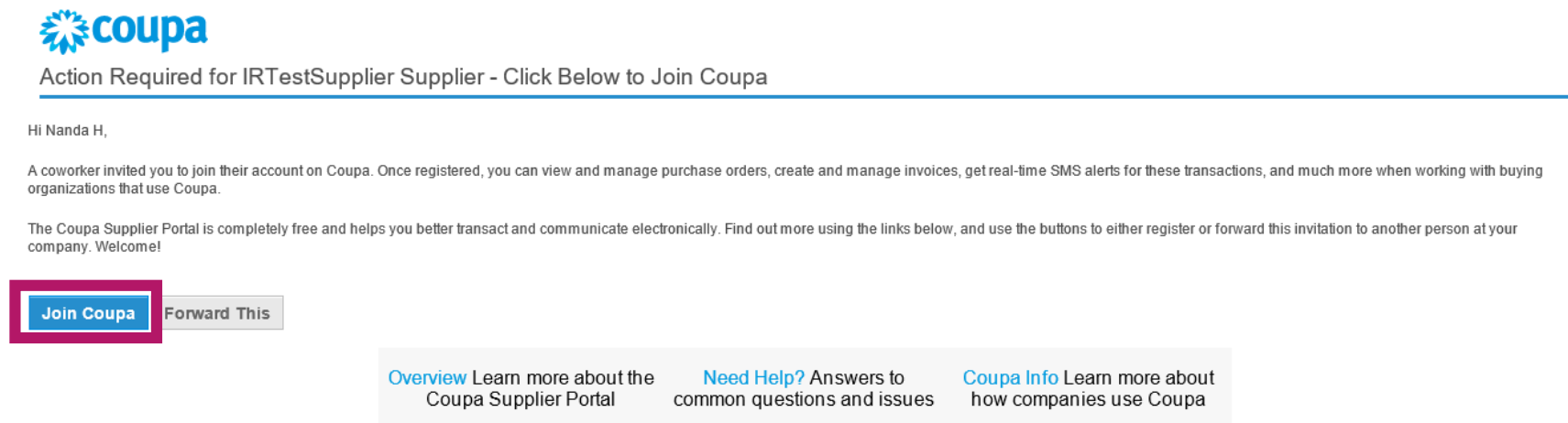
# Manage your Account Invite Users (3/3)



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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.



# Manage your Account

## Configure Account: Customise Permissions

24. Click **Edit**.

25. Adjust the permissions.

26. Click on **Save**.

Edit user access for UAT

ERGO\_UAT\_Supplier\_6

User info

\* First Name   
\* Last Name   
\* Email

Permissions

Customers

All  
 Admin  
 Orders  
 Restricted Access to Orders  
 All  
 Invoices  
 Catalogues  
 Profiles  
 ASNs  
 Service/Time Sheets  
 Restricted Access to Service/Timesheets  
 All  
 Payments  
 Order Changes  
 Pay Me Now  
 Business Performance  
 Sourcing  
 Order Line Confirmation

All  
 Test-System ERGO Group AG - Procurement - Beschaffung

UAT ERGO\_UAT\_Supplier\_6  
ergosuppliers+ERGO\_UAT\_Supplier\_6@gmail.com  
Status: Active

ASNs  
Admin  
Business Performance  
Catalogues  
Community  
Invoices  
Order Changes  
Order Line Confirmation  
Orders  
Pay Me Now  
Payments  
Profiles  
Service/Time Sheets  
Sourcing

Test-System ERGO Group AG - Procurement - Beschaffung

Cancel

Deactivate User

25

26

## Manage your Account Profiles in Coupa

In general, there are two different profiles:

**Public profile:** contains general information about your company (e.g. name, logo, field of activity, number of employees, profiles in social networks or contact information). Your public profile allows other companies to find your company in the Supplier Portal Register and to contact you. The public information is stored in the **General Information** section.

**Customised company profile:** contains general information of interest to your customer, e.g. addresses, contact persons and contact details, as well as company identity information (DUNS and VAT number). The data for the customer-specific company profile is stored in the **Company Details** area.

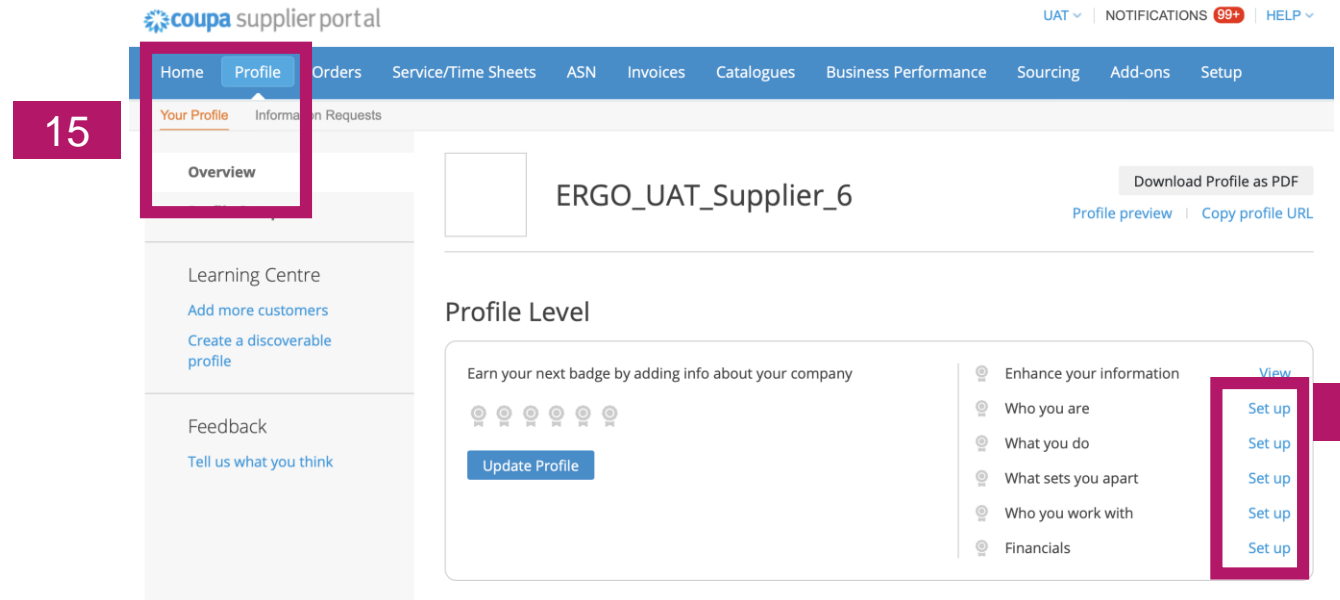
**Note:** Changes to the customer-specific company profile will be forwarded directly to the ERGO Group and our data about you will be updated.

# Manage your Account

## User Settings: Public Profile (1/3)

15. Select **Profile > Your Profile**.

16. Click on **Set up** and complete the information of your public profile in the **Profile Level** section.



### Tip

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

# Manage your Account

## User Settings: Public Profile (1/3)

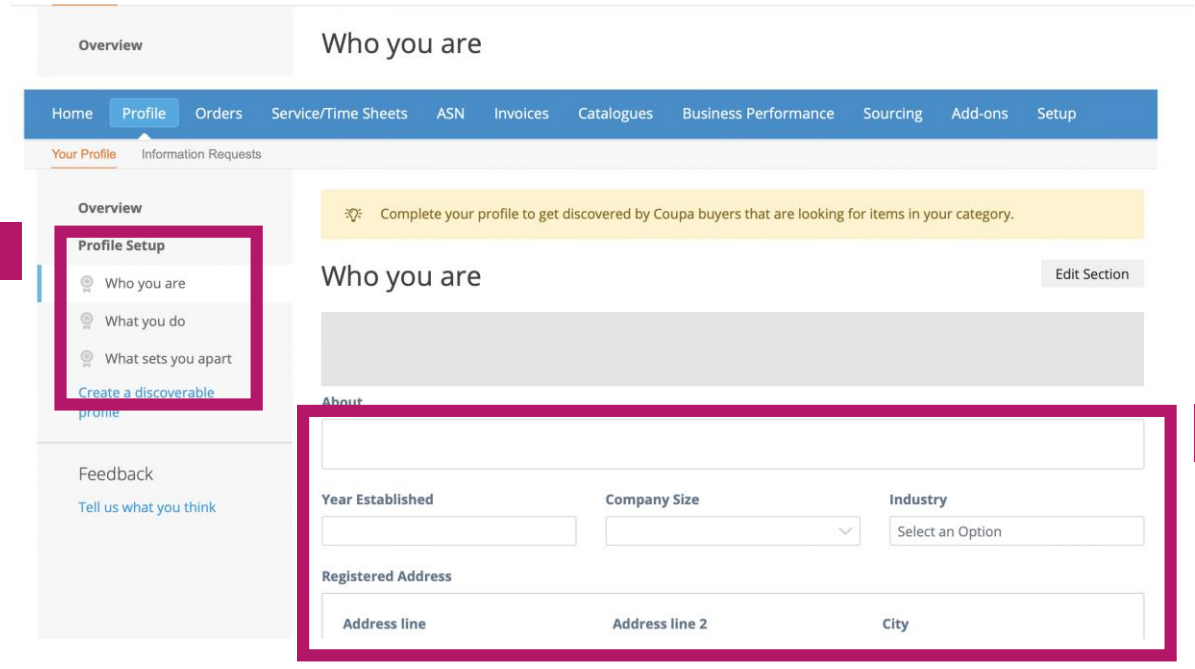
17. Click **Edit Section**.

18. Enter the information.

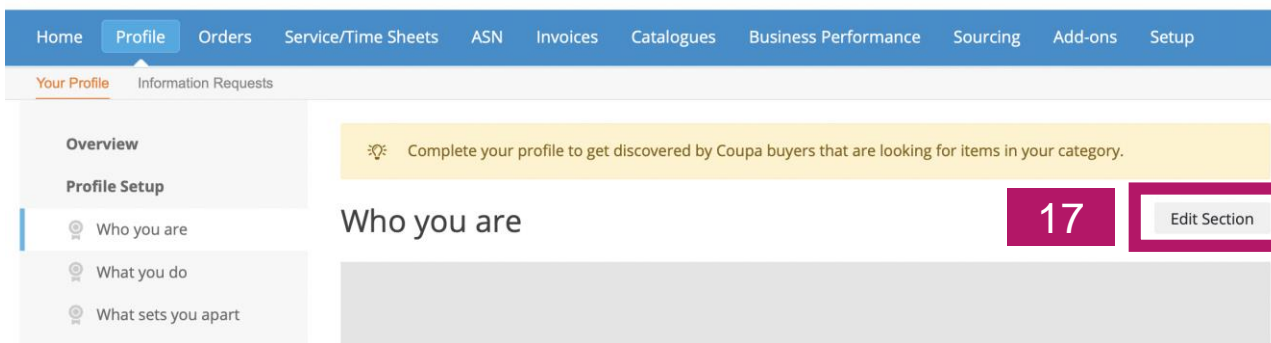
19. Click on **Save changes**.

20. Repeat steps 17 to 19 for each section.

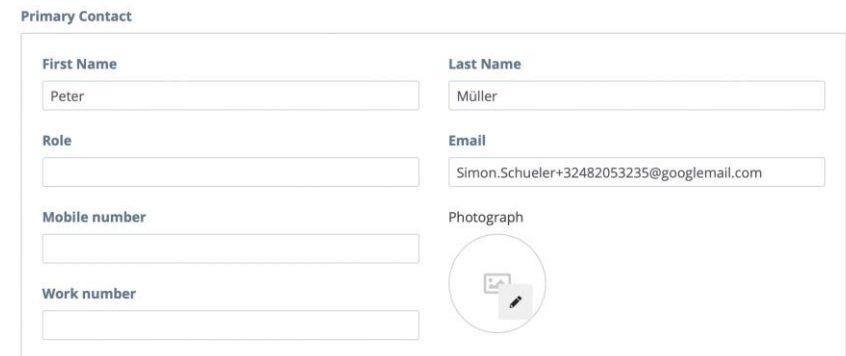
20



18



17



19


# Manage your Account








## User Settings: Public Profile (3/3)

You can see the changes to your profile on the homepage.

ERGO\_UAT\_Supplier\_6

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- Website**  <https://www.test-supplier.io>
- Industry** 
- About**  We are a sustainable company with lots of experience.
- Established**  2010
- Top Commodities**  Software
- Currencies** 
- Public Profile**  [Profile](#)

# Manage your Account

## Configure Account: Customise your Profile

21. Select **Information Request** in your **Profile**.

22. Click **Withdraw**.

Customise your data.

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

The screenshot shows the ERGO Supplier Onboarding portal. At the top, a navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. A red box labeled '21' highlights the 'Profile' menu, which has a sub-menu 'Information Requests' also highlighted. Below the navigation, the page title is 'Test-System ERGO Group AG - Procurement - Beschaffung' and the profile is identified as 'Test-System ERGO Group AG - Procurement - 1'. The main content area is titled 'Pending Approval' and 'Supplier Information Supplier Onboarding Ltd.'. It contains a welcome message and a section for '1. Company Information'. The 'Company Name' field is filled with 'Supplier Onboarding Ltd.'. The 'Primary Address' field is empty. There are two text boxes for 'Here is room for any other remarks you wish to submit'. A red box labeled '22' highlights a 'Withdraw' button. At the bottom, a red box labeled '23' highlights a 'Submit for Approval' button.

## Manage your Account

### Configure Account: Customise your Profile

If you have added a new payee address, set the old address to **inactive**.



Only one payee address can be deposited per currency.





A Munich Re company

# Manage your Account

## Configure Account: Customise your Profile

You will receive a notification when you have **resubmitted** your data for **approval**.

Test-System ERGO Group AG - Procurement - Beschaffung

Profile Test-System ERGO Group AG - Procurement - I

Your information has been submitted

Pending Approval

Supplier Information Supplier Onboarding Ltd.

### 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://www.ergo.com/de/Unternehmen/Geschaeftspartner>

**ERGO Testsystem** Profile Info Recently Updated for Test-System ERGO Group AG - Procurement - Beschaffung on

Coupa

Powered by Coupa

Hi Max,

Your company's profile information was recently updated and sent to Test-System ERGO Group AG - Procurement - Beschaffung on Coupa. This information is important and can contain pay-to information, tax registration, compliance certification information and more.

Please help us ensure security by notifying your customer if this change is inaccurate or unexpected. If the change is expected you can ignore this message.

Thanks!

[View Profile Info](#)

1.4

# Conduct ERGO Supplier Certification



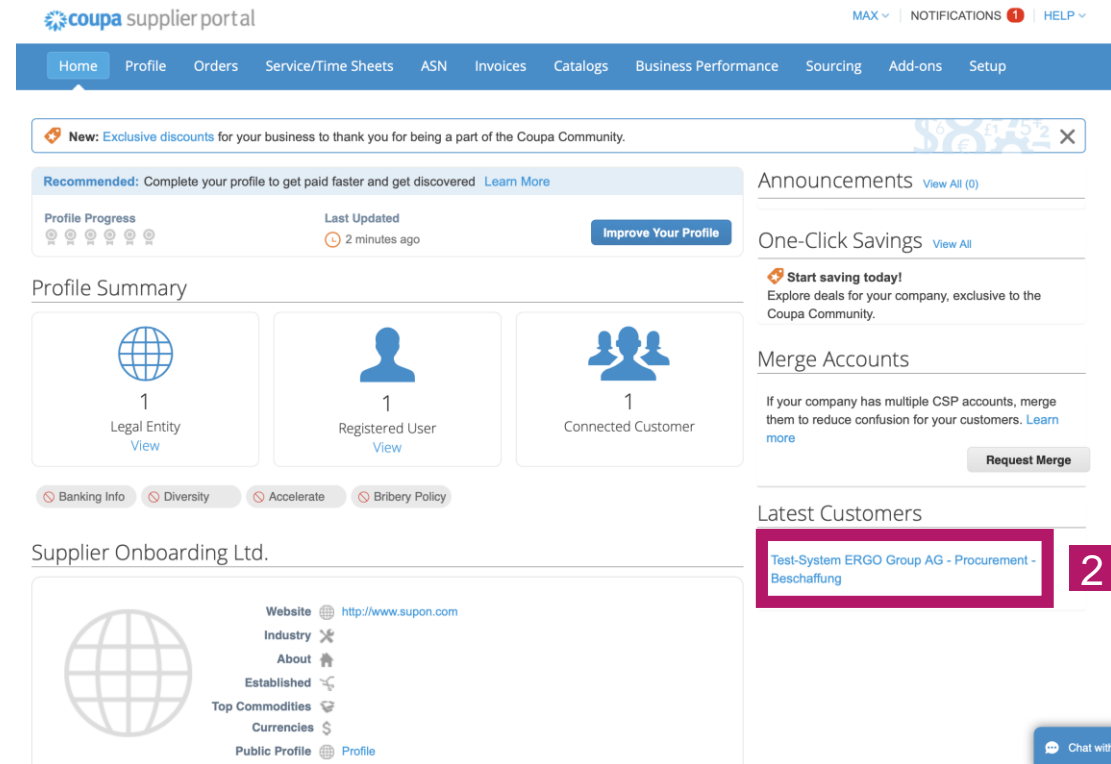
# Supplier Certification of the ERGO Group



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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 [ERGO Group AG - Procurement - Procurement](#) link in the Recent Customers section to complete the registration process.



# Supplier Certification of the ERGO Group



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

The information marked with \* is mandatory. On the following pages we have compiled some information on the requested data.

Test-System ERGO Group AG - Procurement - Beschaffung Profile Test-System ERGO Group AG - Procurement - I

✓ We have auto-filled some information from your Public Profile.

Supplier Information Supplier Onboarding Ltd.

### 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://www.ergo.com/de/Unternehmen/Geschaeftspartner>

### 1. Company Information

\* Company Name   
Including full legal form.

\* Primary Address

Country/Region

Address Name

[Chat with](#)

# Supplier Certification of the ERGO Group



A Munich Re company

1	<b>Company name</b>	Please enter the legally correct company name of your company here
2	<b>Main address</b>	The following information is required: <b>Country/Region</b> = Country, for Germany select <i>Germany</i> . <b>Street Address</b> <b>City</b> <b>Postal Code</b>
3	<b>Contact information</b>	First name, surname, email address, fixed network
4		<b>Email for orders:</b> If you have a dedicated email address to which orders should be sent.
5		<b>Add contact person for accounting Yes / No.</b> If <b>Yes</b> , please enter the following information of the contact person: First name, Last name, Email address
6	<b>Company details</b>	<b>VAT ID or local tax number: Yes / No.</b> If <b>Yes</b> , please enter your <b>VAT ID</b> . If available, also your <b>commercial register number</b>
7		<b>Künstlersozialkasse (KSK):</b> Yes, if you are subject to KSK.
8		<b>Withholding tax Yes / No.</b> If <b>Yes</b> , answer the further questions on withholding tax.
9		<b>IT products / IT services Yes / No.</b> If <b>Yes</b> , please upload the competence matrix.

# Supplier Certification of the ERGO Group



A Munich Re company

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10		<b>Annual turnover in EUR: Year before last, Last year, This year (forecast)</b>
11		<b>Number of employees: Year before last, Last year, This year (forecast)</b>
12	<b>Bank information</b>	<b>Coupa Account Yes / No.</b> Please be sure to enter your payment information. You can find detailed instructions <a href="#">here</a> .
13		<b>Proof of bank details:</b> Upload bank confirmation, blank invoice or bank statement
14	<b>Compliance</b>	Please upload the following documents: <ul style="list-style-type: none"><li>• <b>Non-Disclosure Agreement (NDA):</b> <a href="#">Link to the template on our website</a></li><li>• <b>Confirmation of compliance with the principles of the Global Compact:</b> <a href="#">Link to the template on our website</a></li><li>• <b>Anti-corruption agreement:</b> <a href="#">Link to the template on our website</a></li></ul>
15	<b>Other information</b>	<b>Sustainability area</b>  <b>Experience with Munich Re Group</b>

---

# Supplier Certification of the ERGO Group

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

5. Other Information

\* Does your company publish a sustainability report?  Yes  No

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

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

Here is room for any other remarks you wish to submit

Decline Save **Submit for Approval** 1

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

Your profile was successfully updated.

Overview  
Profile Setup  
Learning Center  
Add more customers  
Create a discoverable profile  
Feedback

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.

Year Established  
2015

Skip for Now Update Profile

# Thank you very much!

**ERGO**

A Munich Re company

You have completed the supplier certification.

The certification will be checked by Central Procurement of the ERGO Group and then approved. You will be notified of this by email.

If you have any queries, please contact [supplier-registration@ergo.de](mailto:supplier-registration@ergo.de).





## Supplier Certification of the ERGO Group

### 12. Enter Bank Information

1. Click on the **Add Remit-To** button.

The bank account wizard opens in the foreground.

2. Click **Create New Remit-To Address**.

#### 3.4 Banking Information

\* CSP Account  Yes  
 No

Did you create an account with the Coupa Supplier Portal (CSP) to access this self-assessment (log-in WITH password)?

#### \* Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

The screenshot shows the 'Add Remit-To' button highlighted with a red box and a red '1' next to it. Below it, the 'Proof of Bank details' section is visible, with a 'Datei auswählen' button and the text 'Keine Datei ausgewählt'. A note states 'REQUIRED to validate any new Bank Account created within Coupa'. The 'Choose Remit-To Address' dialog box is open, showing a yellow banner with the text 'Choose a Remit-to Location below - Recommended' and a sub-note: 'It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.' Below this, the text 'Choose existing or create new Remit-To Address:' is followed by a list of addresses: '205 Balboa Av.', 'Houston, TX 77078', 'United States', and 'United States'. A 'Choose' button with a green checkmark is next to the first address. At the bottom of the dialog, the '+ Create New Remit-To Address' button is highlighted with a red box and a red '2' next to it, and a 'Cancel' button is also visible.

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

3. Enter the name of the company in the **Legal Entity Name** field.
4. Select your **Country/Region**.
5. Click **Continue**.

Where's your business located? ✕


Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* **Legal Entity Name**

**Country/Region**

**3** This is the official name of your  
**4** business that is registered with the local government and the country/region where it is located.

**5**

 The selected country determines the following questions, which may vary depending on the country. In these instructions, the procedure for Germany is shown.

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

Here you enter general information about your company.

- 6. Indicate the **Type of Company**.
- 7. Enter the name of the **Board of Directors**.
- 8. Click **Save & Continue**.

Miscellaneous Information ✕

1 2 3 4

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country/Region

\* Type of Company  6

Board of Directors  7

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

8

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

- 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**.
- 12. Enter the **VAT ID**.
- 13. Click **Save & Continue**.

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

All

Test-System ERGO Group AG - Procurement - Beschaffung

What address do you invoice from?

\* Address Line 1  9

Address Line 2  REQUIRED FOR INVOICING

\* City  10

State

\* Post Code  11

Country/Region

Use this address for Remit To

Use this for Ship-From address

What is your Tax ID?

Country/Region

\* VAT ID  12

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code

Preferred Language

13

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

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

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

15. Enter the **Name of the Bank**.

16. Enter the **Account Number** and confirm the **Number** in the **Confirm** Field.

17. Click **Save and Continue**.

Guideline for ERGO Group Suppliers on the Use of the Coupa Supplier Portal (CSP)

Where do you want to receive payment? Company

1 2 3 4

\* Payment Type **Bank Account** **14**

What are your Bank Account Details? [?](#)

Bank Account Country/Region:

Bank Account Currency:

Beneficiary Name:

Bank Name:  **15**

Account Number:  **16**

Confirm Account Number:

Sort Code:  [?](#)

SWIFT/BIC Code:  [?](#)

Bank Account Type:

Supporting Documents   [?](#)

**17** **Save & Continue**

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

- 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.

Where do you want to receive payment? ×

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	35 Queens Lane London SE1 5SG United Kingdom	Active	<span>Manage</span>
Bank Account Bank of London Supplier Onboarding Ltd. *****5678 101499 *****LCON	18 Cherryblossom Street London SE1 9SG United Kingdom	Deactivated	<span>Manage</span>

Deactivate Legal Entity **18** Next

Where do you ship goods from? ×

1 2 3 4

For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
35 Queens Lane London SE1 5SG United Kingdom	Active	<span>Manage</span>

Deactivate **19** Done

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

20. Click **Add Now to** complete the process and add the bank details to the registration.

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 starting on page 49](#).

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

20

Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

21

\*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 Account  IBAN Number  
Options  Bank Account + Routing Number

Please provide either the IBAN Number (e.g. for EU / SEPA countries) OR the Bank Account + Routing Number (e.g. for the U.S)

\* Beneficiary Name Supplier Onboarding Ltd.

# Supplier Certification of the ERGO Group

## 12. Enter Bank Information

22. Click **Yes, save to Profil** to complete the supplier registration.

[Save This Information to Your Profile?](#)

x

Save this info to your profile so that you'll be able to re-use it when other customers request you the same information.

The following info will be saved to your profile:

PO Email	c.weidner@appose.com
DUNS #	
<b>Primary Contact</b>	
Last Name	Power
Work Phone	+1 (112) 555-6789
Mobile Phone	+1 (555) 345-6789
Fax Number	+1 (112) 345-6789

[Learn More](#)

Not Now

Yes, Save to Profile

22



**ERGO**

A Munich Re company

# Imprint

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