Start Using Coupa Supplier Portal (CSP)

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

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

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 anehemen
- 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.

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 to continue.

11. Click without entering anything in the payment terms. These are maintained by Central Procurement of the ERGO Group.
12. Click the 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.
Start Using Coupa Supplier Portal (CSP)

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:
     - Home
     - Add-ons
     - Setup
  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 > UAT
  7. Change your personal settings in the User Details section.
  8. Click Save.
  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.

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 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. Enter the channel.
  4. Customise your data.
  5. Click Submit for Approval to allow your client to review and approve the data again.
7 Supplier Certification

If you are not yet certified as an 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: 35 Queen's Lane
   * Address Line 1: SE1 8SG
   * City: London
   * State: United Kingdom
   * Country/Region: United Kingdom

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

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

Continue next column ...

9 ... Enter Bank Information

12. Enter the VAT ID.

   What is your Tax ID?

   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.

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

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

Continue next column ...
Start Using Coupa Supplier Portal (CSP)

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, which is updated and supplemented as required: https://www.ergo.com/en/Unternehmen/Geschaetztpartner

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 coupa@ergo.de

Thank you very much!
Your ERGO Procurement Team