COUPA USER GUIDE

SIM Suppliers

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WHAT IS COUPA?

It is the world-class solution selected to **standardize the purchasing process of Xignux and its businesses** . Through this technological platform we will gain visibility, control and efficiency for decision making.

4.000+ Customers

100+ Countries

8M+ Suppliers

Multi Currency

Multi Language

Rated #1 by top analysts

Gartner Spend Matters PayStream Advisors

FORRESTER IDC

WHAT IS SIM ?

The ***Supplier Information Management*** (SIM) makes it easy to request, approve and maintain supplier information, while keeping everything in sync with your ERP.

SIM helps all types of employees better manage supplier information. SIM streamlines the request, approval and maintenance of supplier information, such as financial information, quality or insurance certifications and contact information. Through the use of forms, approval workflows, notifications and integration with financial systems, SIM helps ensure:

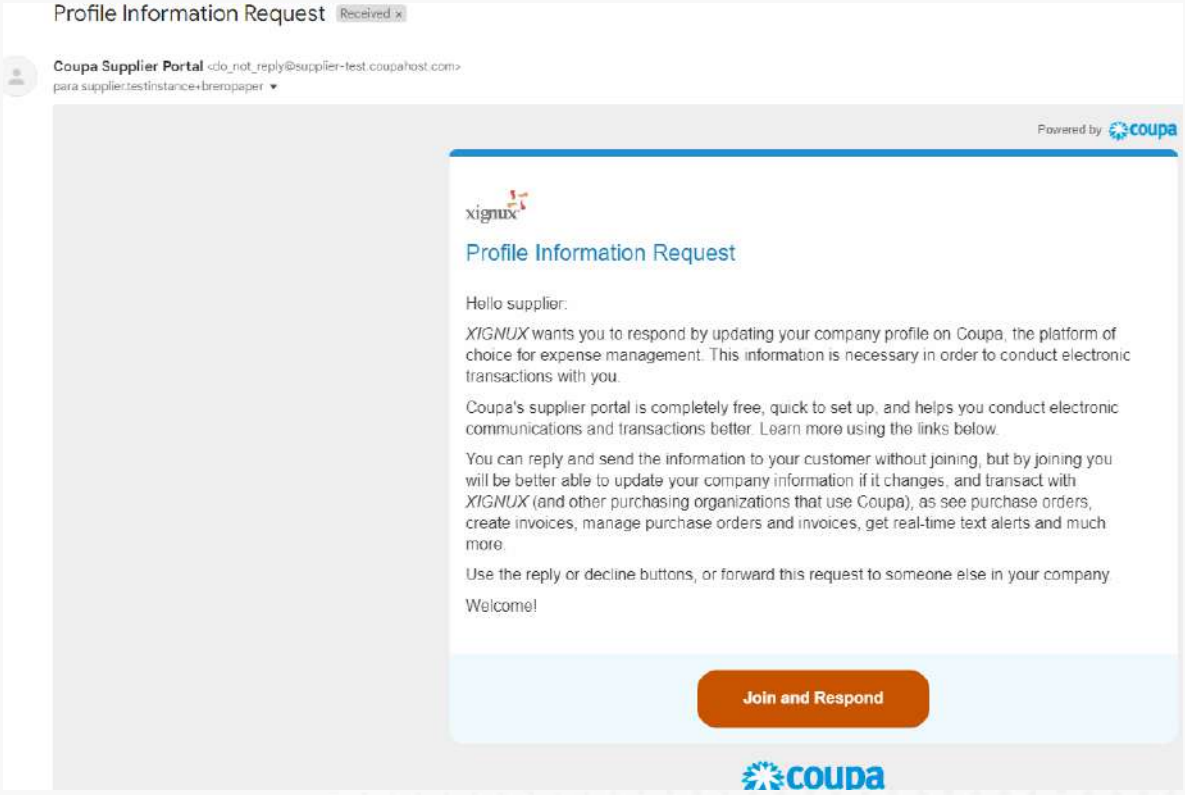
- Unvetted providers or services go through the appropriate approval channels.
- Information for suppliers large and small is accurate and current.
- Visibility to certifications and contract information.
- Suppliers are paid on time, avoiding late fees and strained supplier relationships.
- Multiple information management channels (e.g., paper forms, emails, phone calls, spreadsheets) are eliminated.
- Supplier participation.
- Two-step integration with your ERP system.
- Accurate supplier data is maintained and maximum savings are realized.

REGISTER AS A SUPPLIER

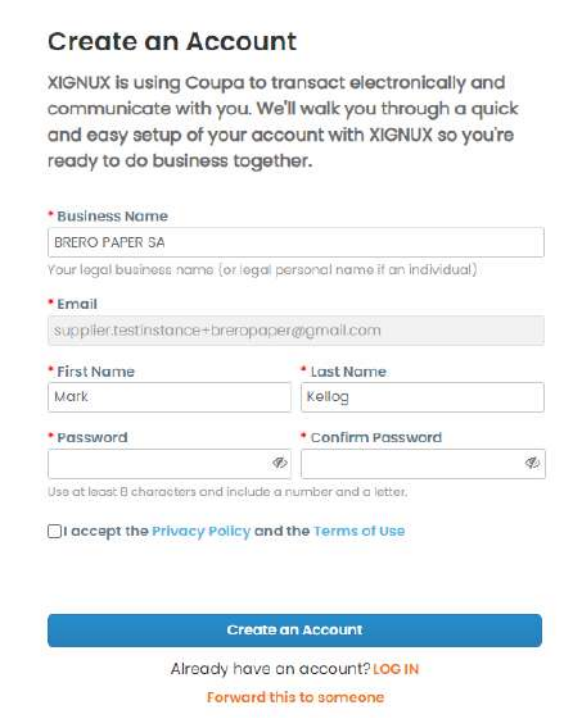
Cuando un proveedor está en proceso de alta recibirá una invitación por correo electrónico desde la dirección **do_not_reply@supplier.coupahost.com** para registrarse en el Coupa Supplier Portal (CSP) y hacer el llenado de la información requerida. Este correo electrónico recibido no es transferible. En caso de no recibir de manera oportuna el correo electrónico se deberá consultar la sección de “correos no deseados / Spam” de su bandeja.

When a supplier is in the registration process, they will receive an invitation by email from the address **do_not_reply@supplier.coupahost.com** to register in Coupa Supplier Portal (CSP) and fill out the required information. This email received is not transferable. If you do not receive the email in a timely manner, you should check the “junk emails / Spam” section of your inbox or notify to your internal contact.

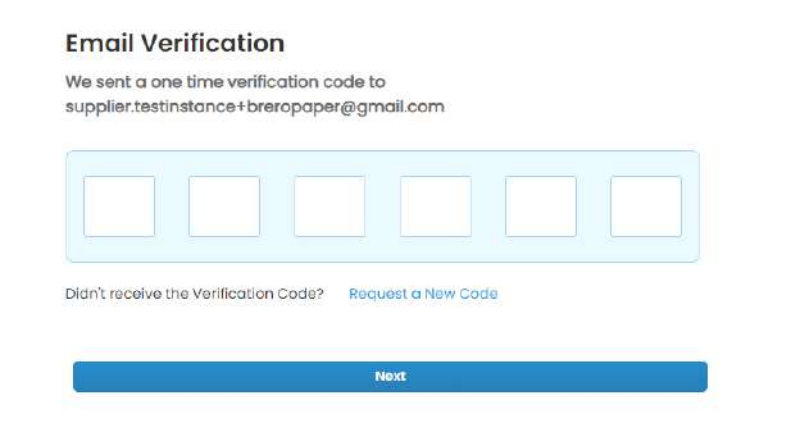
The supplier receives an invitation by mail to register for the Coupa Supplier Portal (CSP) and send the requested information.

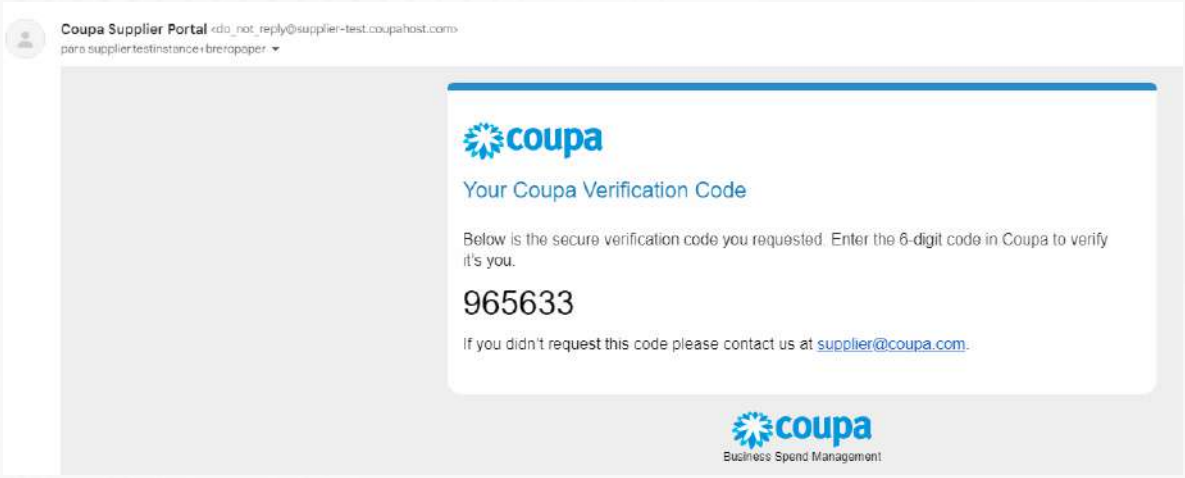


The recommendation is that the provider clicks on “**Join and Respond**” to start your registration in the CSP, this will lead you to complete your CSP access credentials:

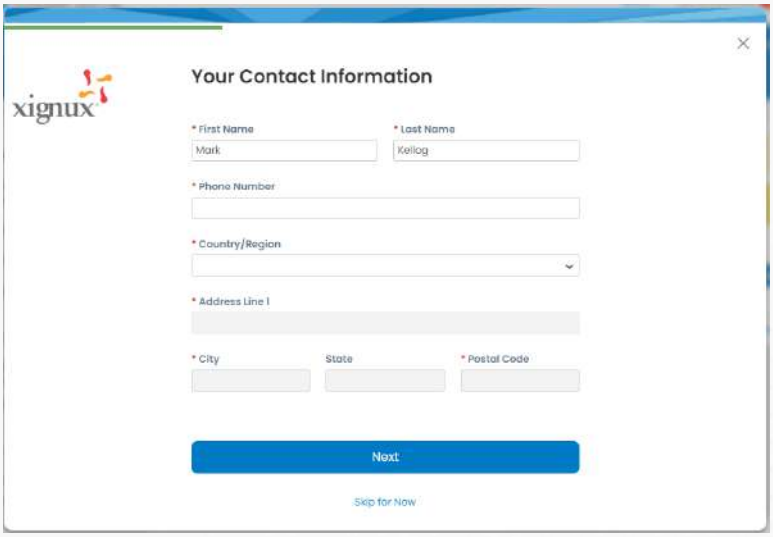


The supplier profile must be created with the email address that received the invitation from the company. Subsequently, upon filling out the required information, Coupa will send a unique verification code to the same email to validate access:

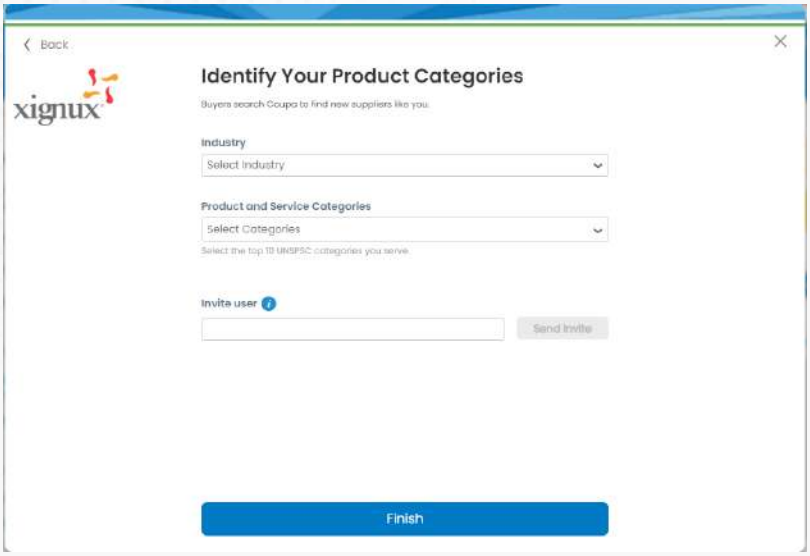




You must then confirm basic information about your company:

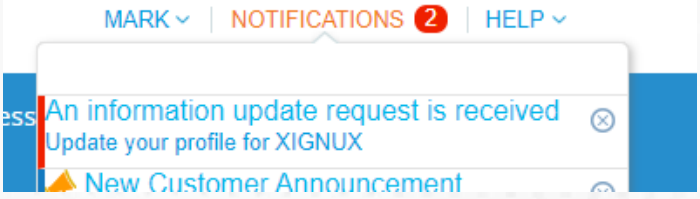


Complete the information until the last stage and click “Finish”:

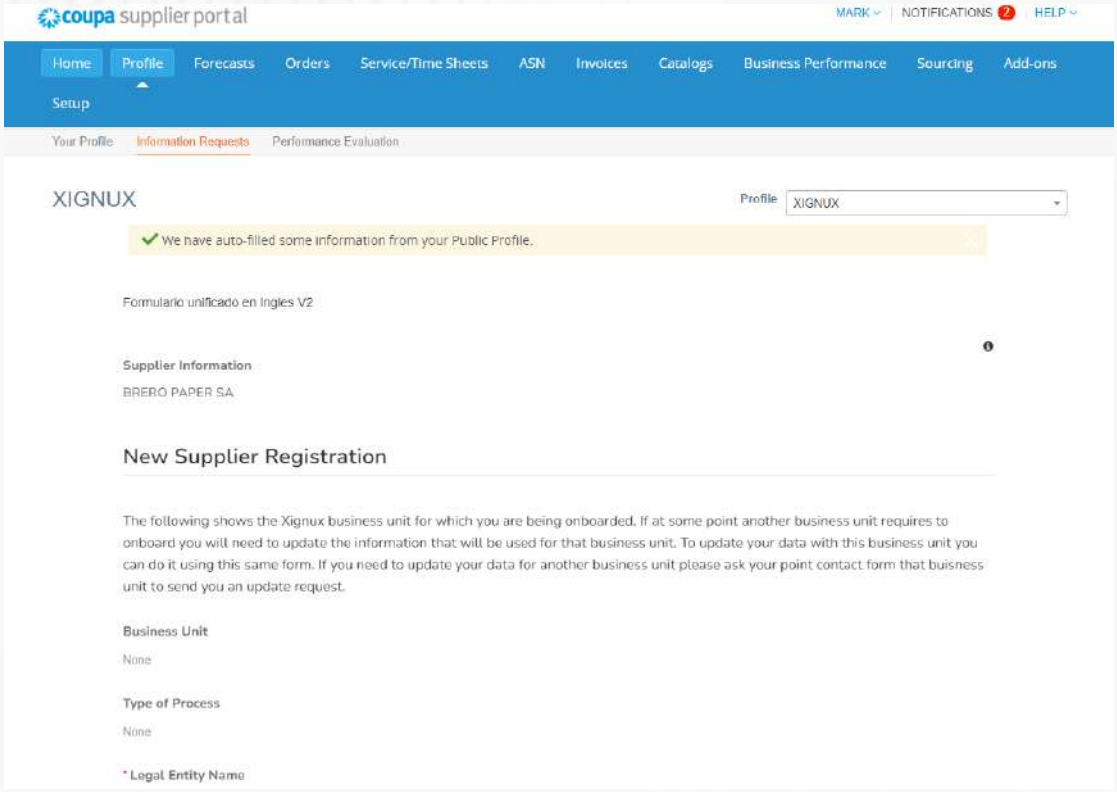


Once the registration has been completed, you must click on the “Finish” button and you will immediately see a notification in the upper right part of the screen, which will allow you to access the supplier registration form.

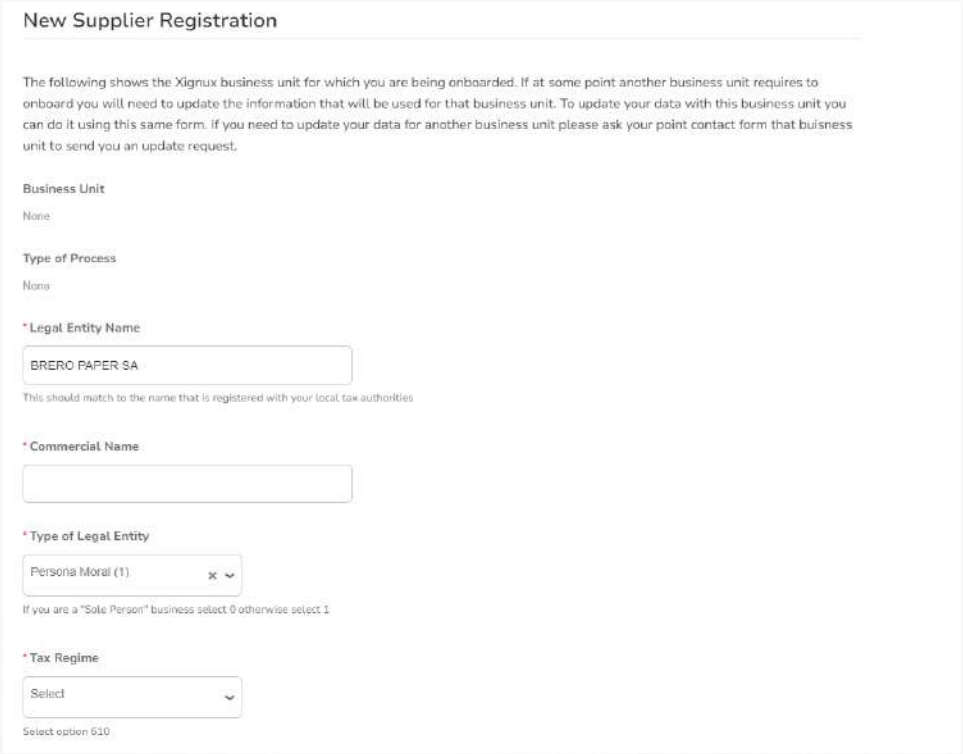
Note: At the bottom of the Coupa page you can change the language of your Coupa profile to whatever you prefer.



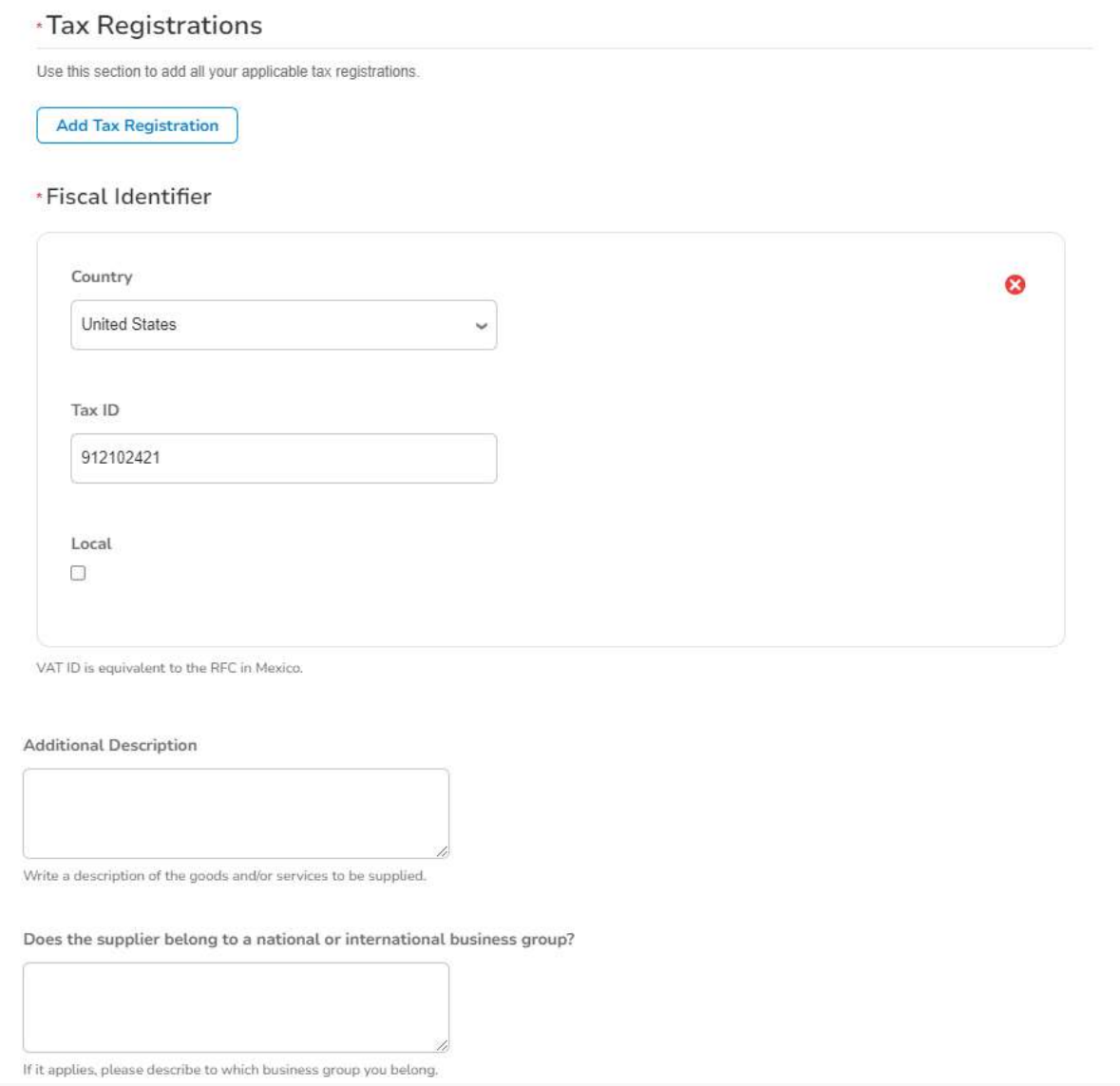
The supplier will find fields for different information. Fields with a red asterisk * are mandatory.



In the supplier form there are fields referring to **Supplier identification**:



Fields referring to **tax Registrations** :



Supplier's contact information:

* Primary Contact

Supplier's primary contact name

* Contact Purpose

Procurement

* Contact's Name

Mark

* Contact's Last Name

Kellog

* Contact Phone

US/Canada | +1 (650) 555-1212

650-555-1212

* Contact Email Address

supplier.testinstance+breropaper@gmail.com

* Standard Contact

Supplier Secondary Contact Name

* Contact Purpose

Select Some Options

* Contact's Name

Mark

* Contact's Last Name

Kellog

* Contact Phone

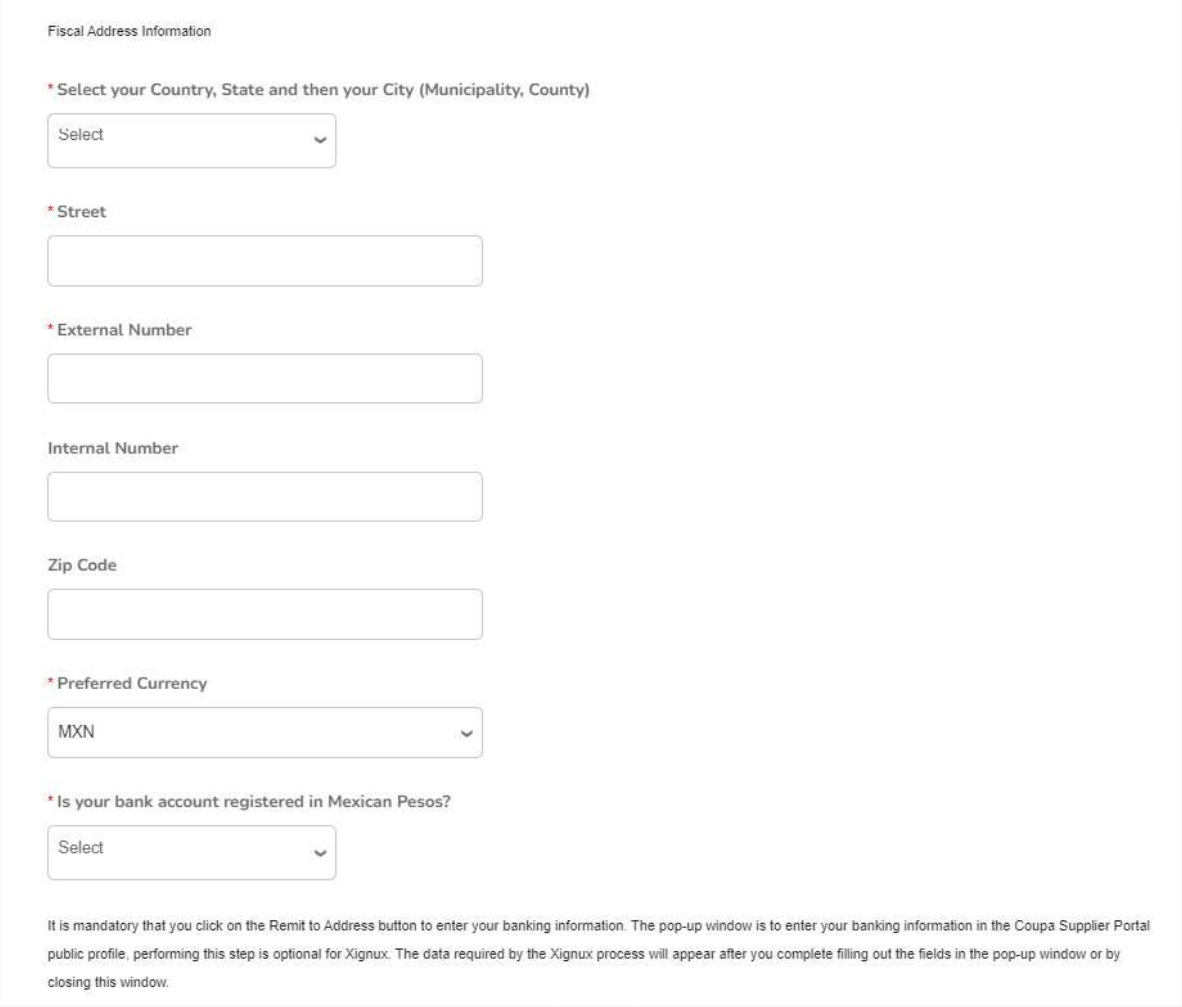
US/Canada

650-555-1212

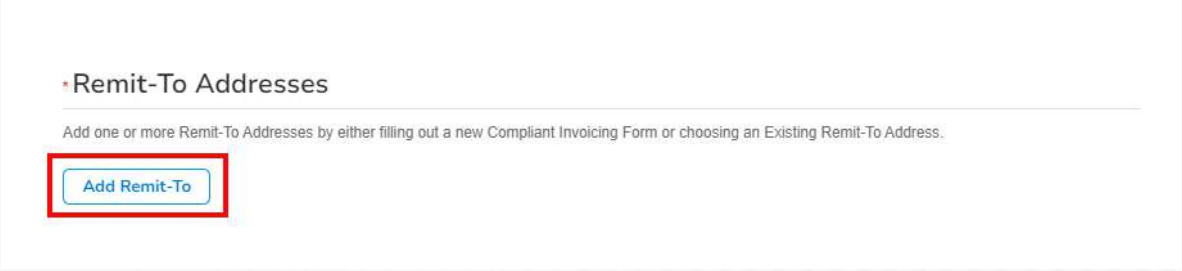
* Contact Email Address

supplier.testinstance+breropaper@gmail.com

Fields referring to **information about the Fiscal Address Information**:



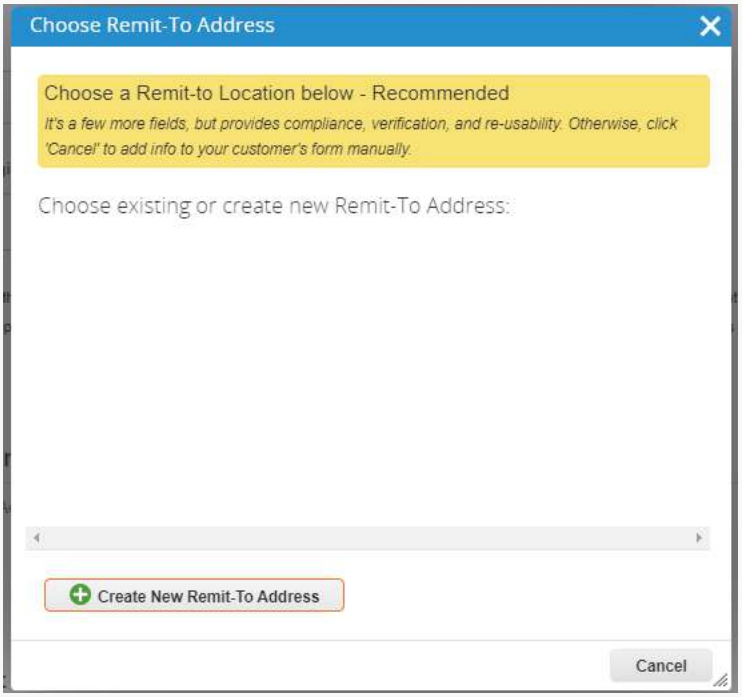
Fields referring to **Remit-To Address**:



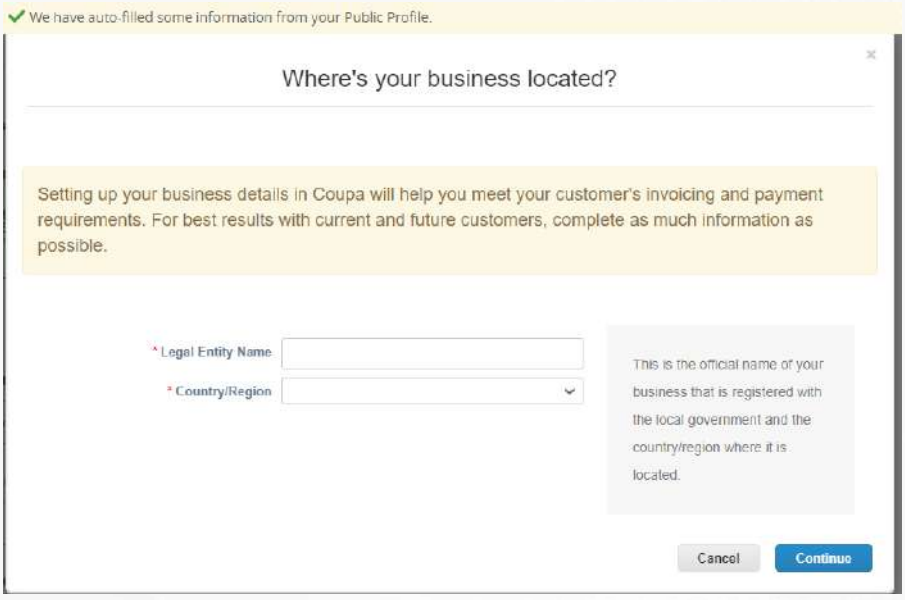
It is mandatory that you click on the “Add Remit-to” button to enter your banking information.

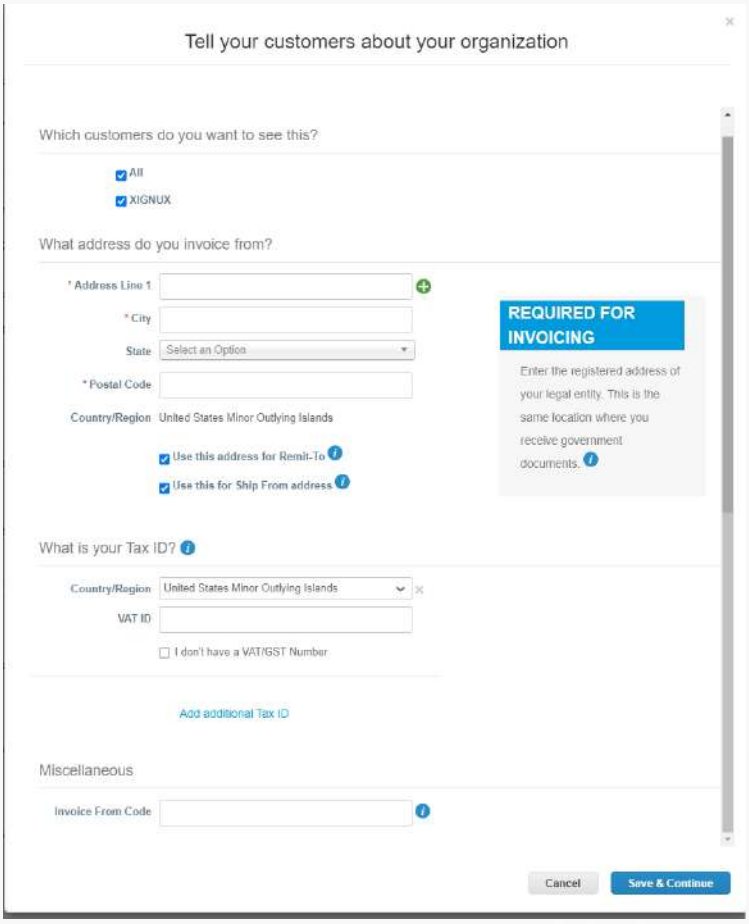
The data required by the Xignux process will appear after you complete filling out the fields in the pop-up window or when you close this window.

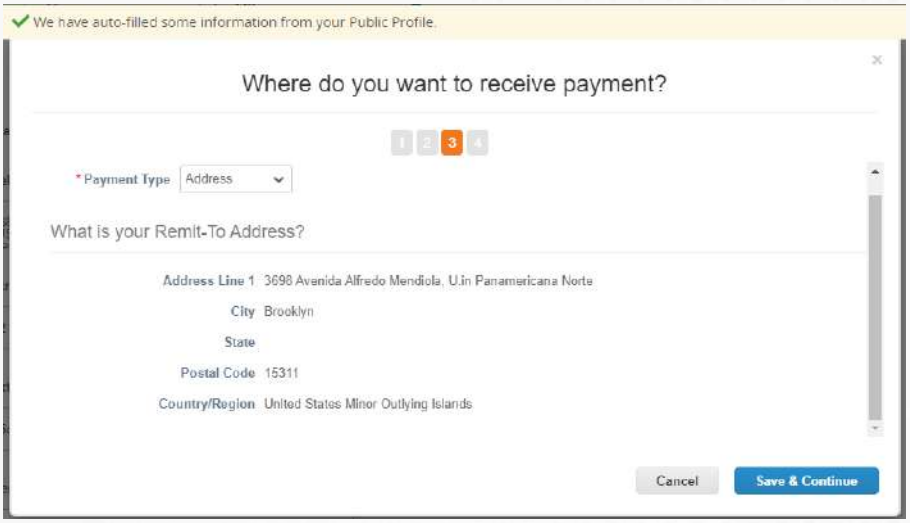
By clicking on “Create new Remit-To address” follow the step by step to create a new return address:



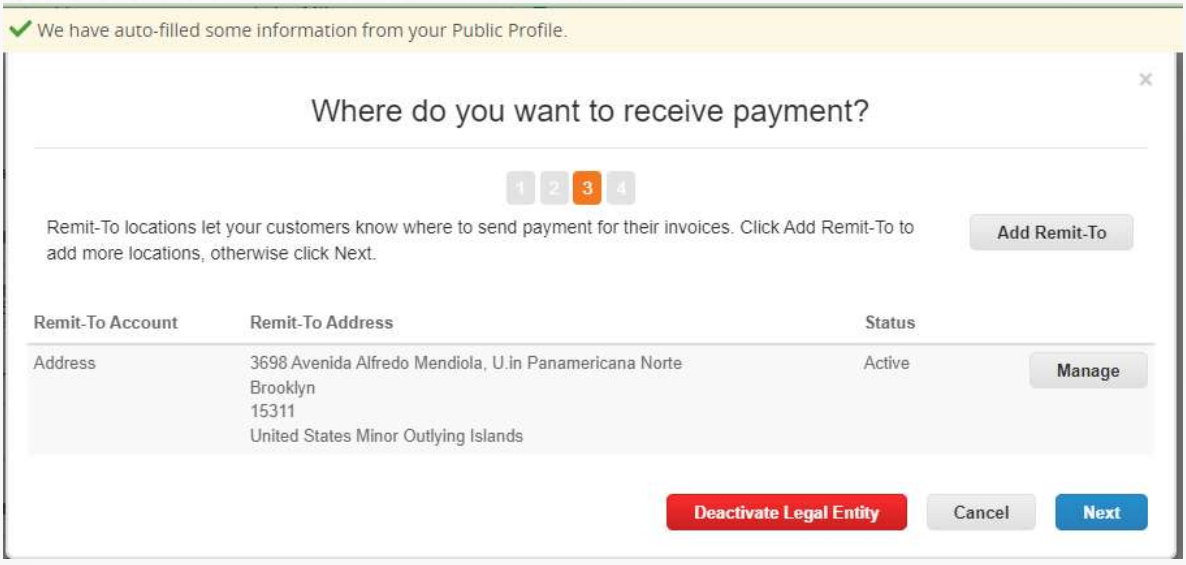
Complete the information for each stage and click “Continue”:



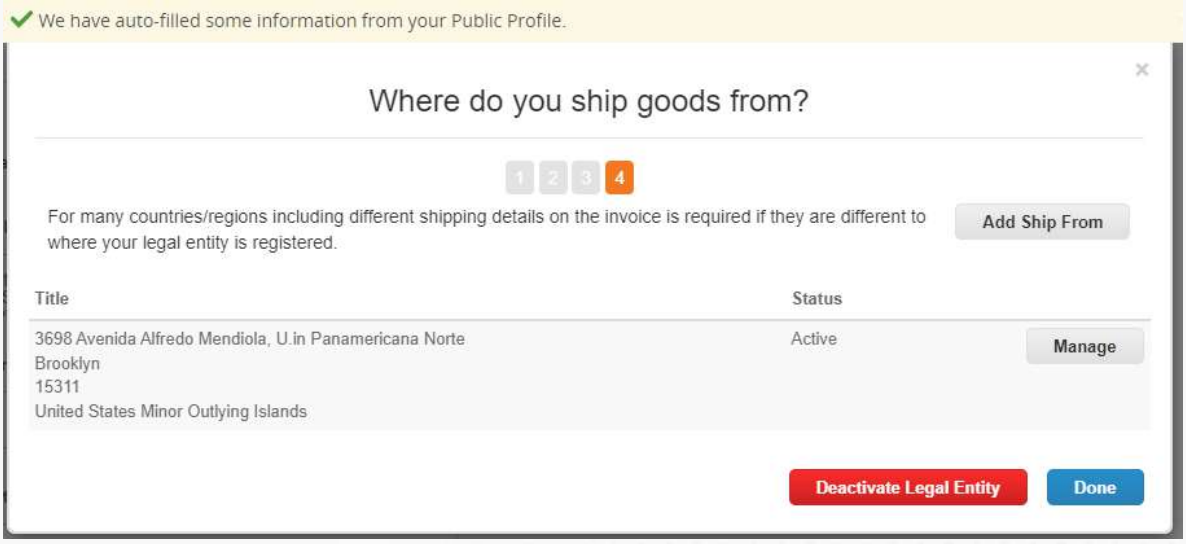

Tell your customers about your organization
Which customers do you want to see this?
All
XIGNUX
What address do you invoice from?
* Address Line 1
* City
State
Select an Option
* Postal Code
Country/Region United States Minor Outlying Islands
Use this address for Remit-To
Use this for Ship From address
REQUIRED FOR INVOICING
Enter the registered address of your legal entity. This is the same location where you receive government documents.
What is your Tax ID?
Country/Region United States Minor Outlying Islands
VAT ID
I don't have a VAT/GST Number
Add additional Tax ID
Miscellaneous
Invoice From Code
Cancel
Save & Continue


We have auto-filled some information from your Public Profile.
Where do you want to receive payment?
1 2 3 4
* Payment Type Address
What is your Remit-To Address?
Address Line 1 3698 Avenida Alfredo Mendiola, U.in Panamericana Norte
City Brooklyn
State
Postal Code 15311
Country/Region United States Minor Outlying Islands
Cancel
Save & Continue

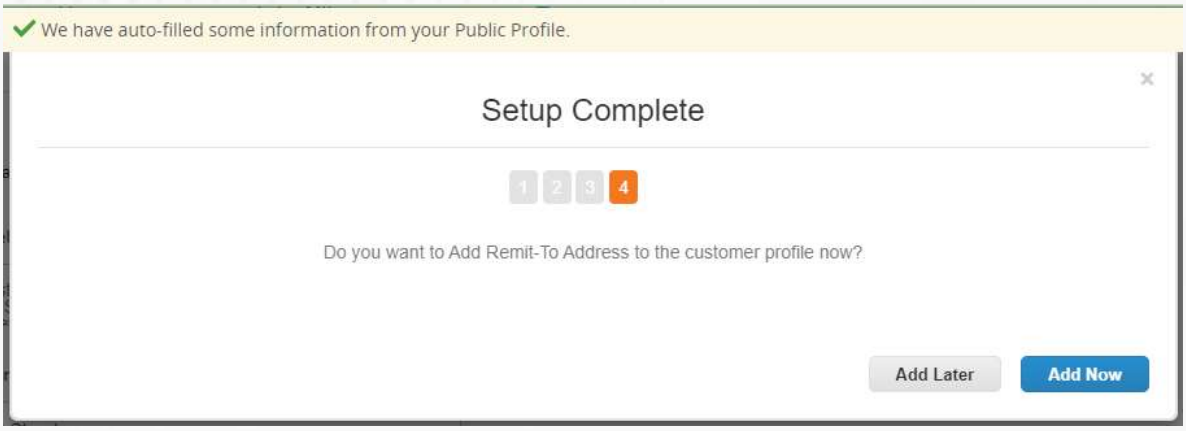
Click “Next”:



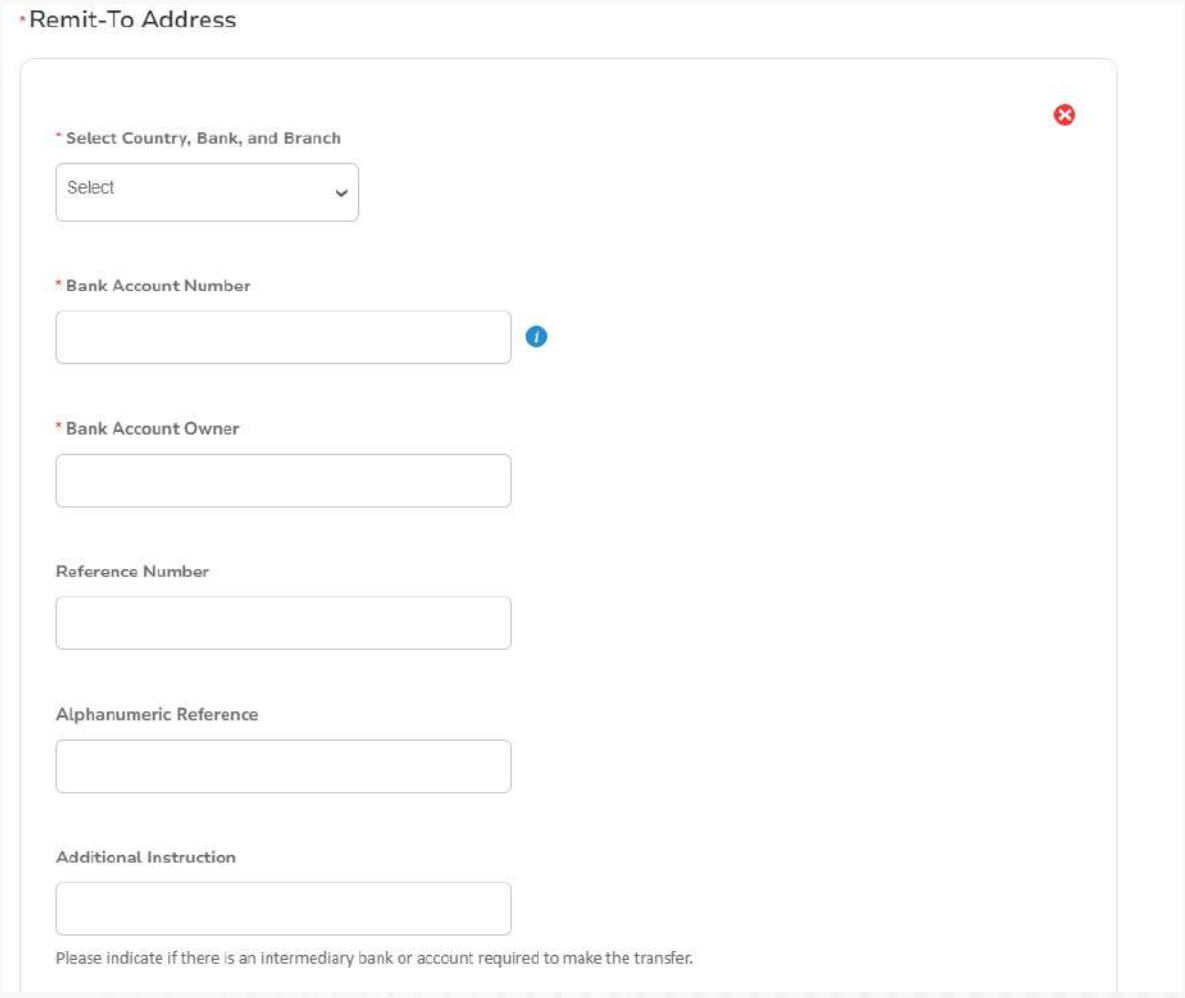
Them click “Done”:



To finish click “Add now”:



COUPA then enables the **banking information fields** :



Swift Code

ACH Code

ABA Code

IRC Code

CIE Agreement

* Currency of Bank Account

MXN

* Bank Statement Header

* Attachments

Add File

* Method of Payment

Transferencia (Transferencia)

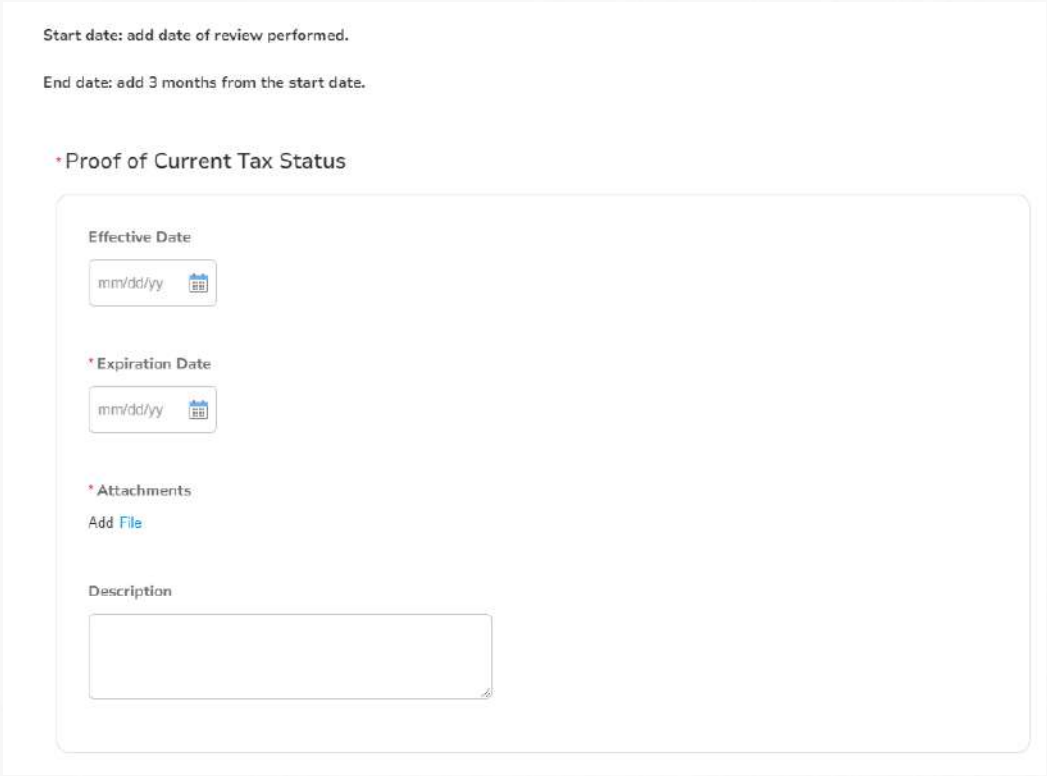
Transferencia means Wire Transfer

Does the supplier apply for factoring?

Start date: add date of review performed.

End date: add 3 months from the start date.

The supplier will find fields referring to different documents that must be sent to XIGNUX:



Upload a photo of the location no older than 3 months.

Start date: add the date when the location image was taken.

End date: add 12 months from the start date.

* Photo of Supplier's Establishment

Effective Date

mm/dd/yy

* Expiration Date

mm/dd/yy

* Attachments

Add File

Description

Upload a photo of the location no older than 3 months.

Start date: add the date when the location image was taken.

End date: add 12 months from the start date.

* Establishment Location Photo

Effective Date

mm/dd/yy

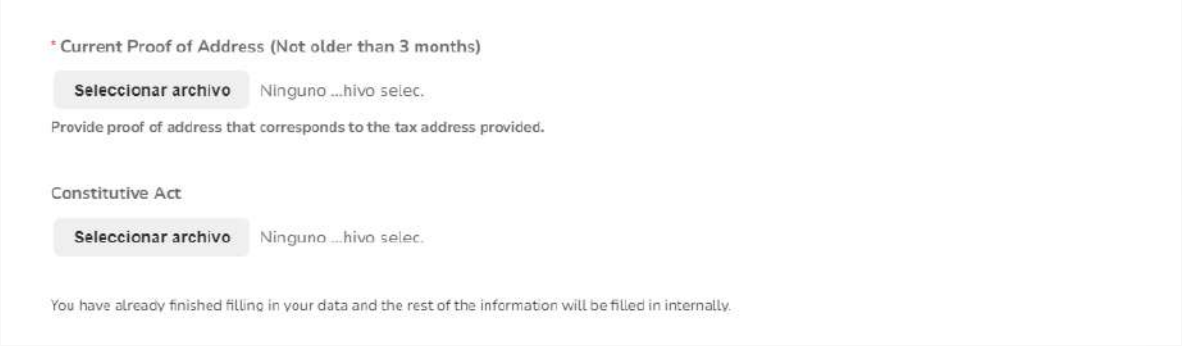
* Expiration Date

mm/dd/yy

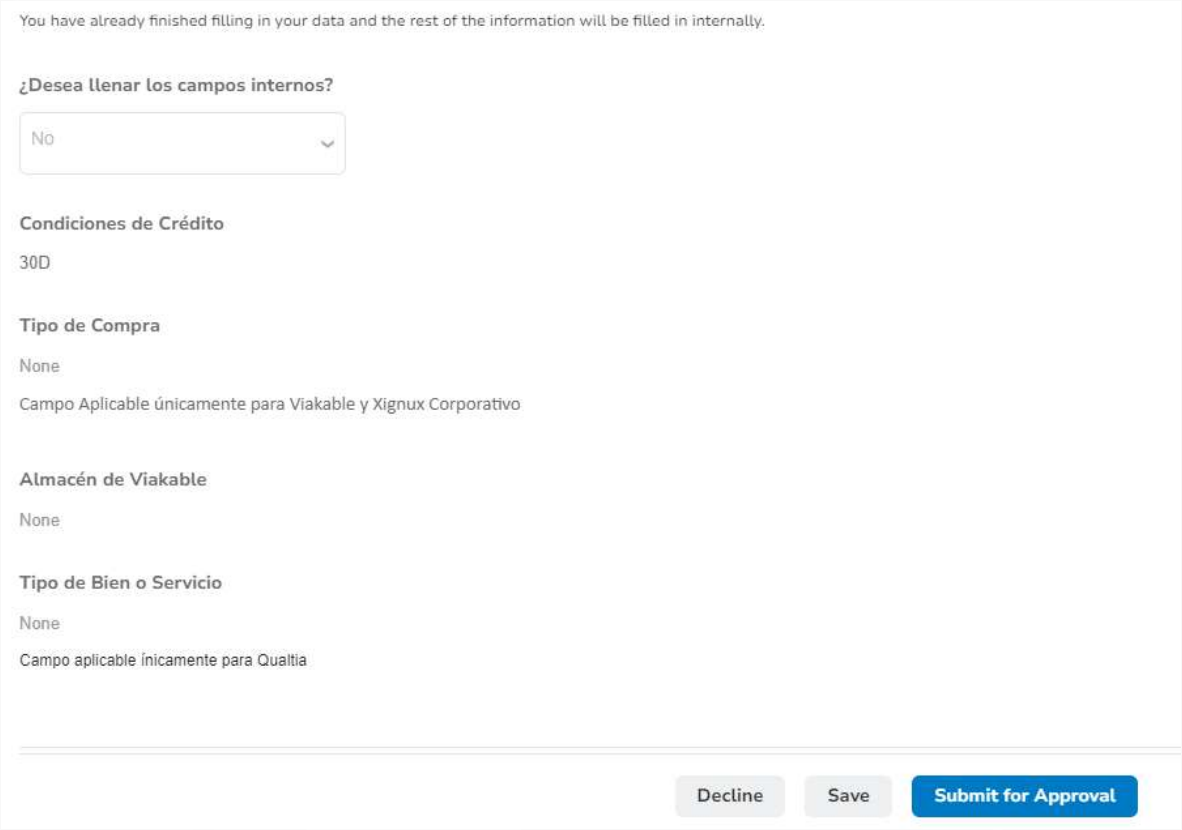
* Attachments

Add File

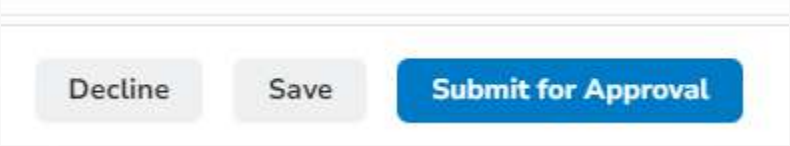
Description

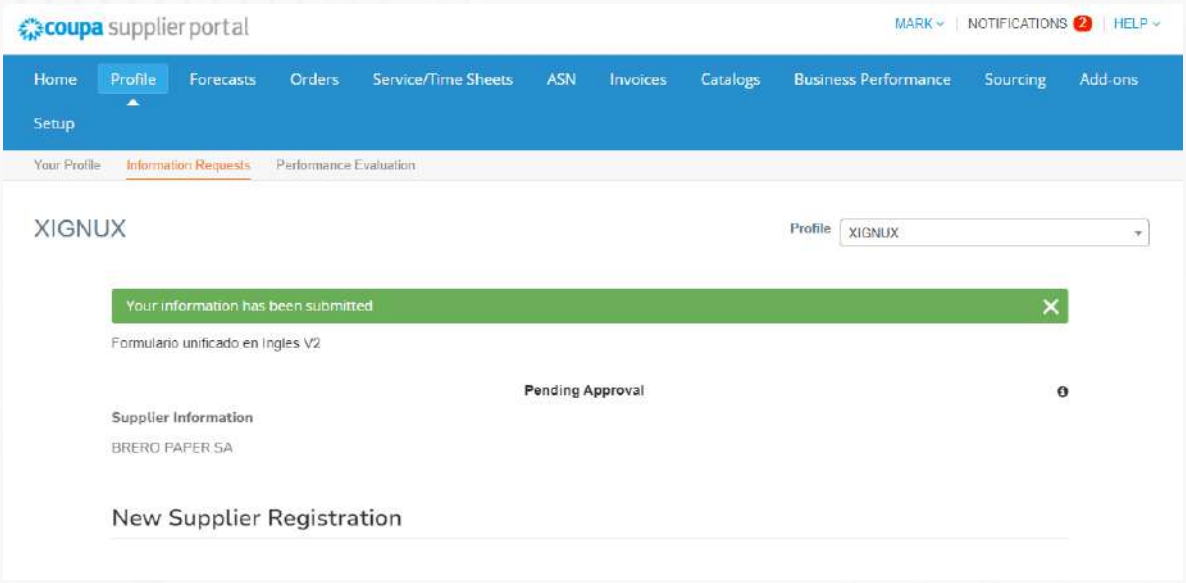


At the end of the form you will find fields that are not editable, these fields are for internal use of XIGNUX.



After completing all the fields intended for the supplier, the flow continues in XIGNUX after the supplier submits the form by clicking “Submit for approval”.





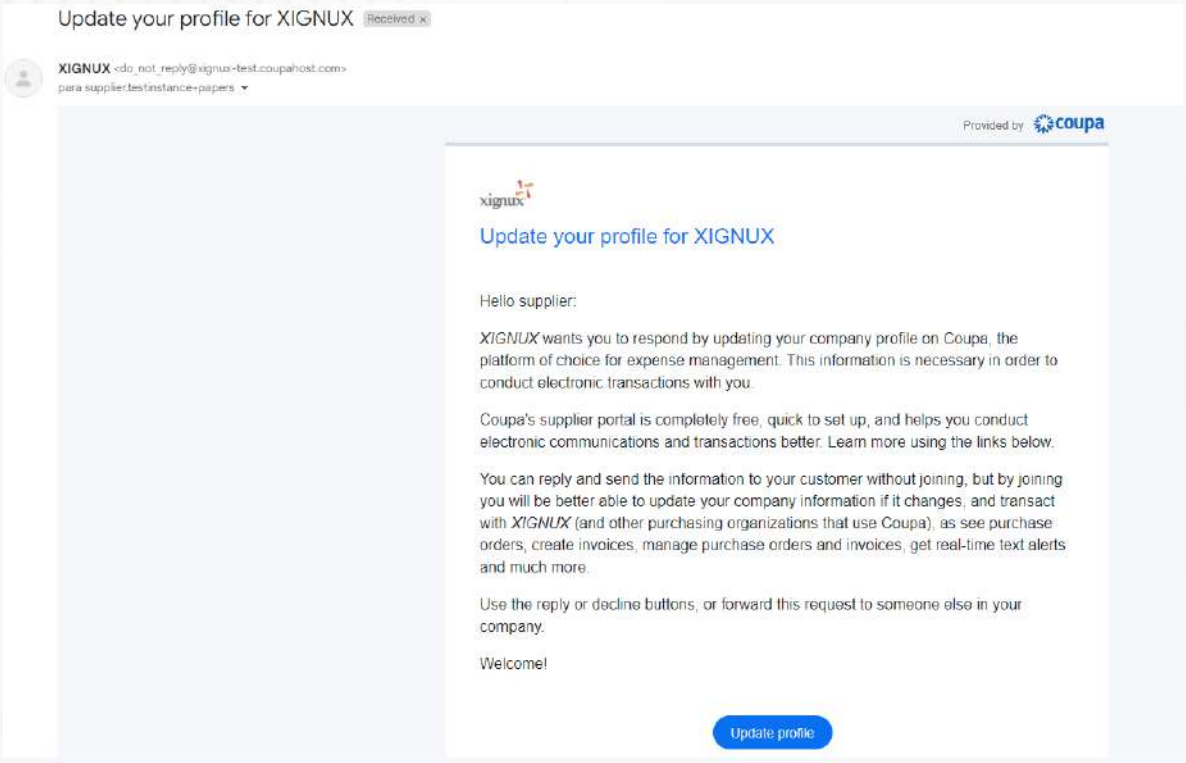
UPDATE INFORMATION

If necessary, the information can be updated through two initiatives:

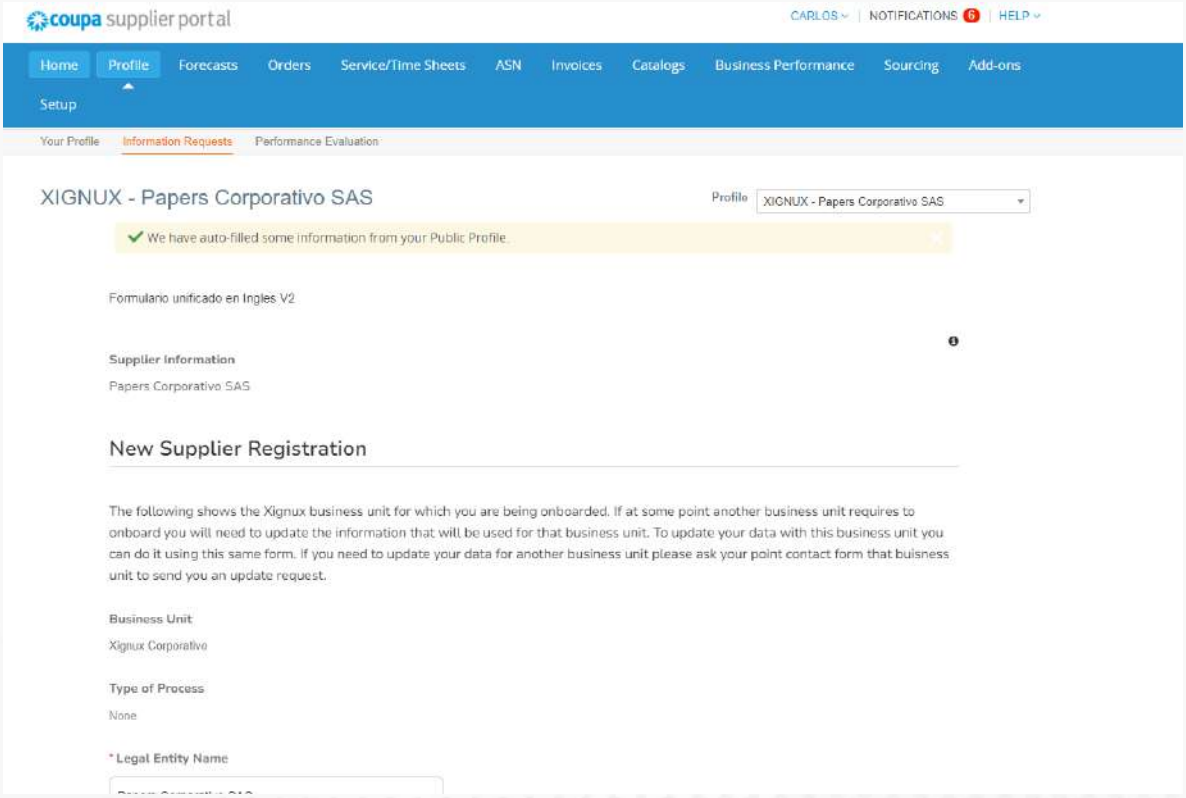
XIGNUX

XIGNUX may request that you update your information.

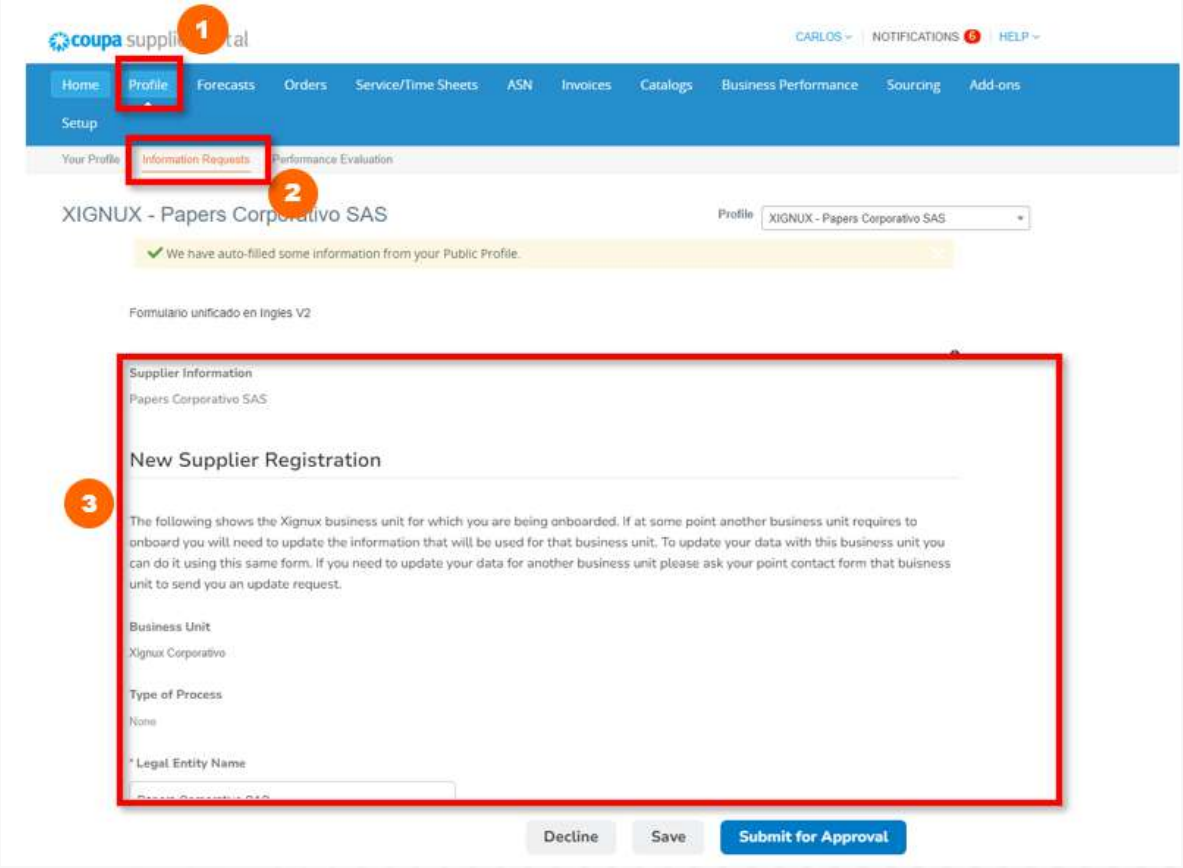
1. You will receive a notification email to enter the portal, click update profile.



2. You will go directly to the page of the form that you need to complete and that was already described in this manual:



By the supplier itself

The supplier can request updating of its information from the Supplier Portal.

1. Enter the CSP and click on the “Profile” menu.
2. Click on the “Information Requests” submenu.
3. Update your information.
4. At the bottom of the page click “Submit for approval”.