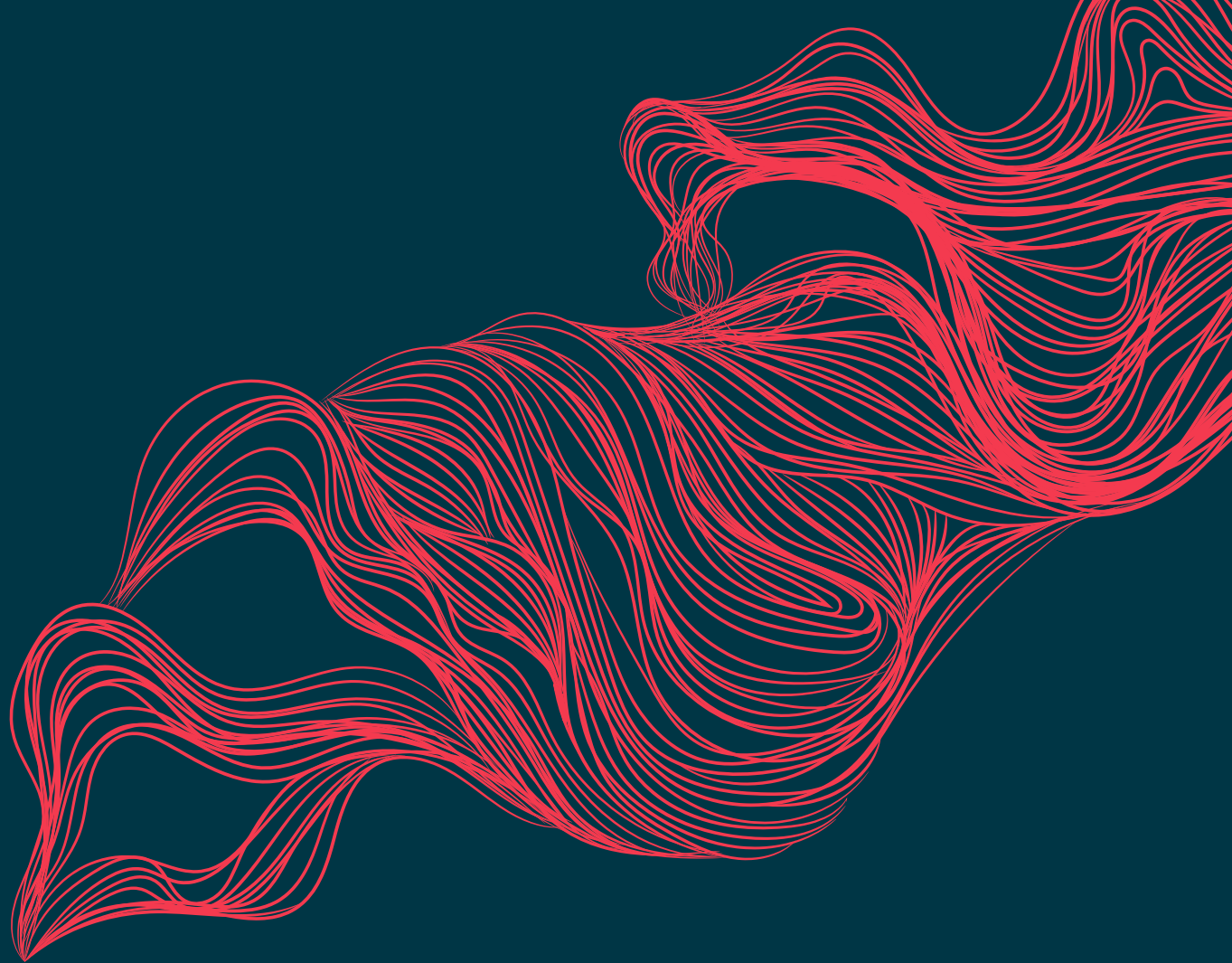
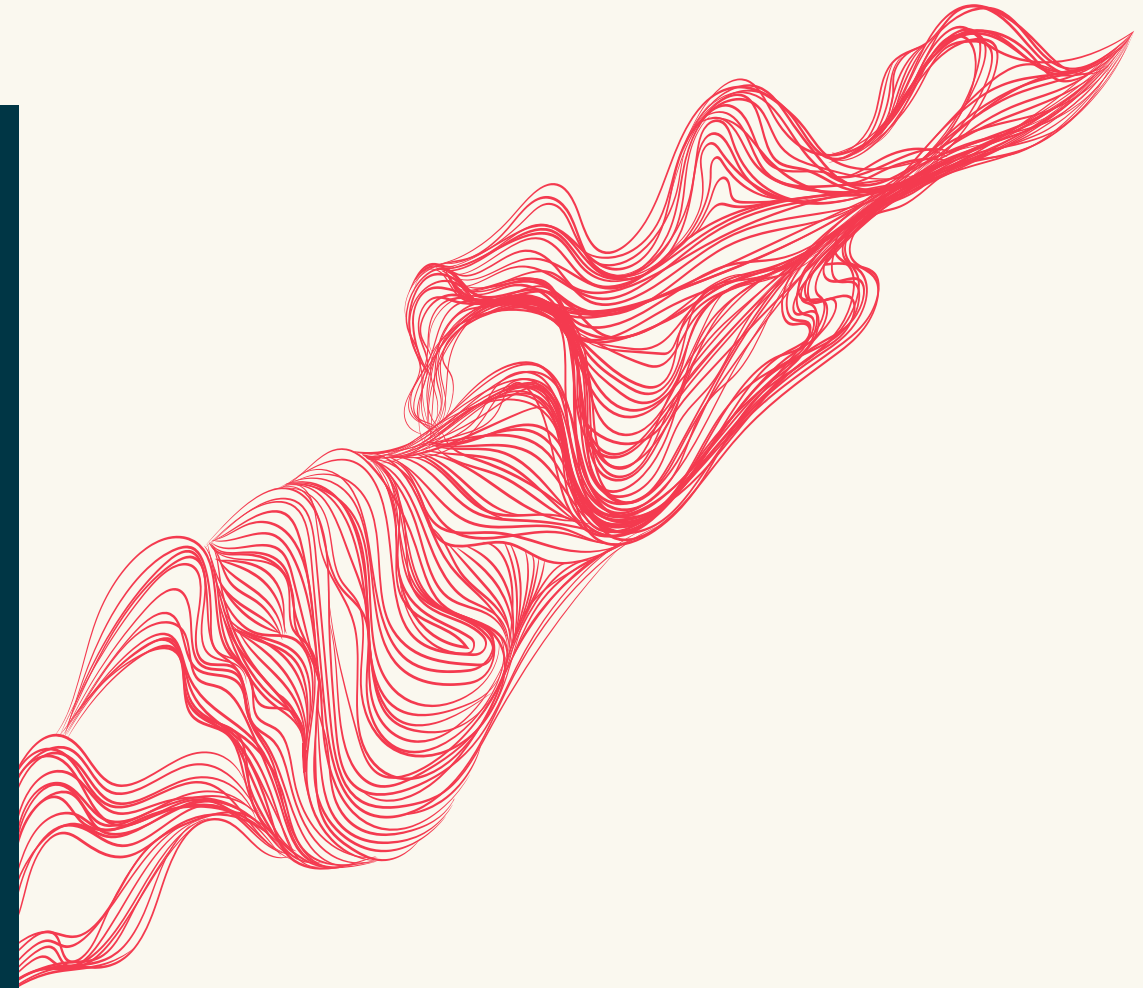


Coupa Supplier Training Guide

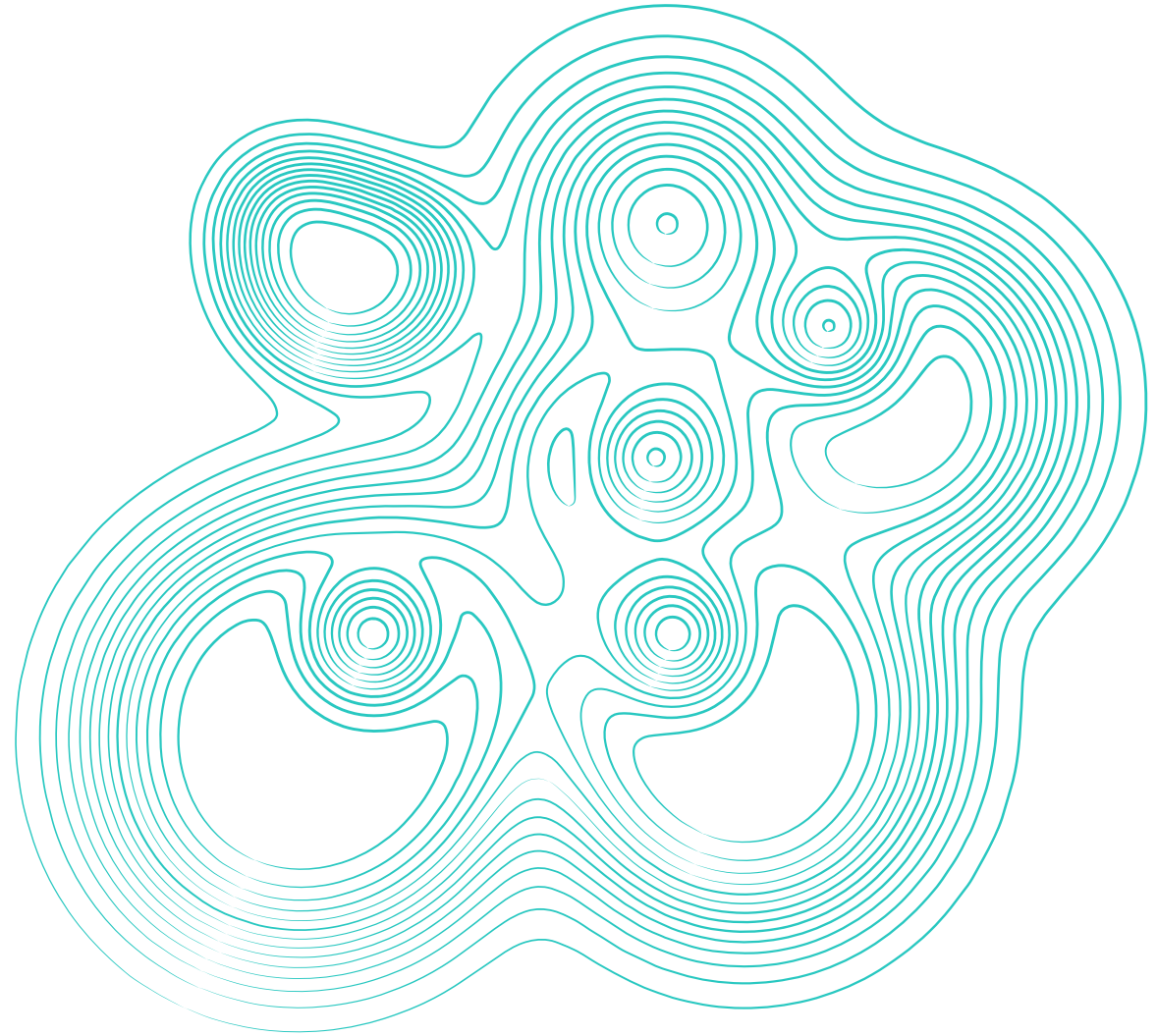


Agenda / Contents

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Introduction to Coupa Supplier Portal (CSP)



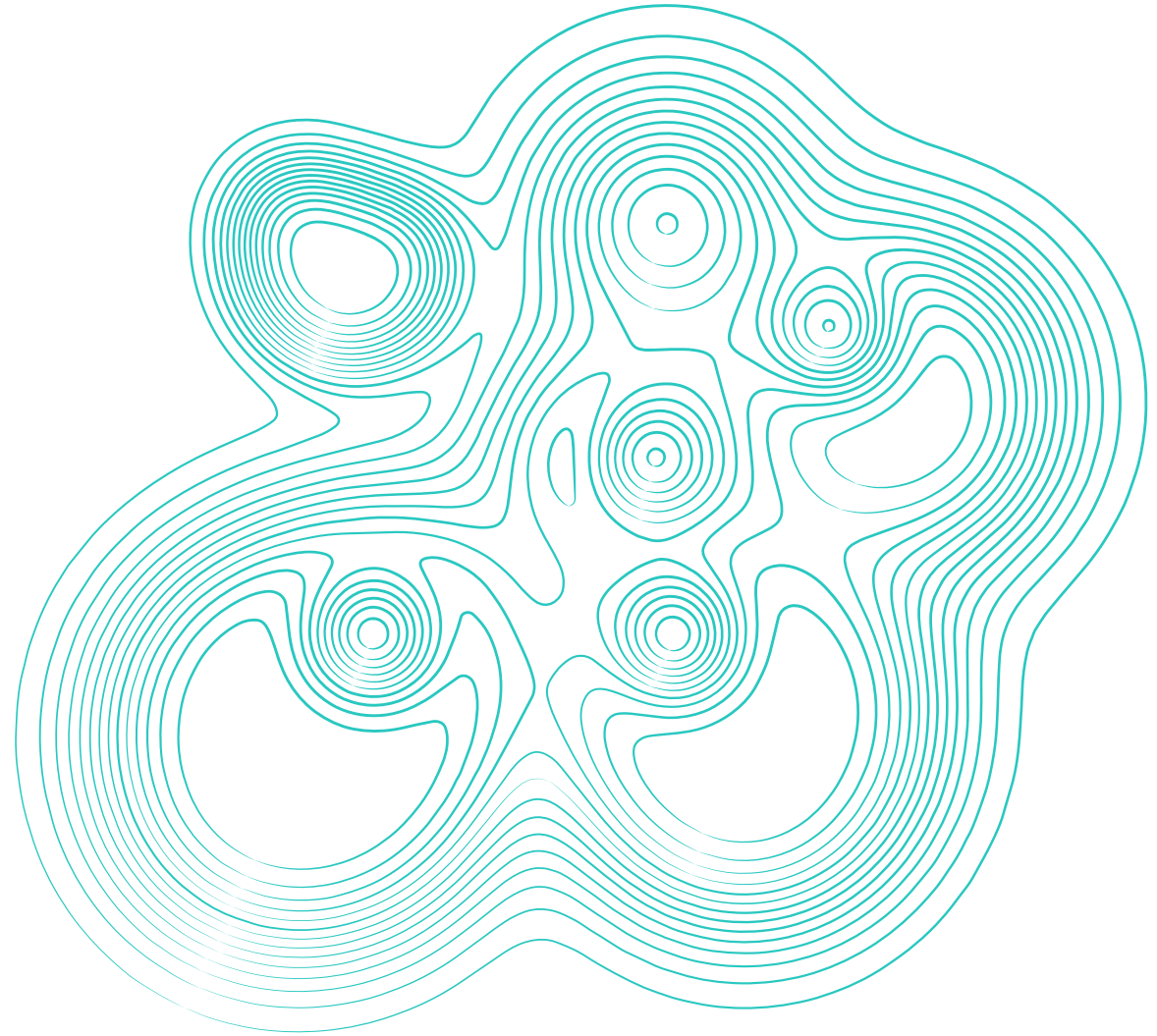
Why Coupa?

- Coupa is a cloud-based e-procurement platform for business spend, delivering measurable value through real-time spend visibility, control, compliance, and agility.
- Gartner, the world's leading research and advisory company, named Coupa **a Leader** in 2024 for its completeness of vision and ability to execute. Coupa was one of only two vendors to receive this recognition.
- One of the criteria that ranked Coupa as number one is its high user adoption.
- Coupa provides three major releases or upgrades per year –in January, May and September – all free of charge.



COUPA SUPPLIER PORTAL

1. Introduction



Coupa Supplier Portal | Introduction

The Coupa Supplier Portal (CSP) is a free tool that enables suppliers to easily do business with their customers. It simplifies the management of procurement processes and related transactions. Depending on your specific Coupa configuration, content and settings are managed on a customer-by-customer basis.

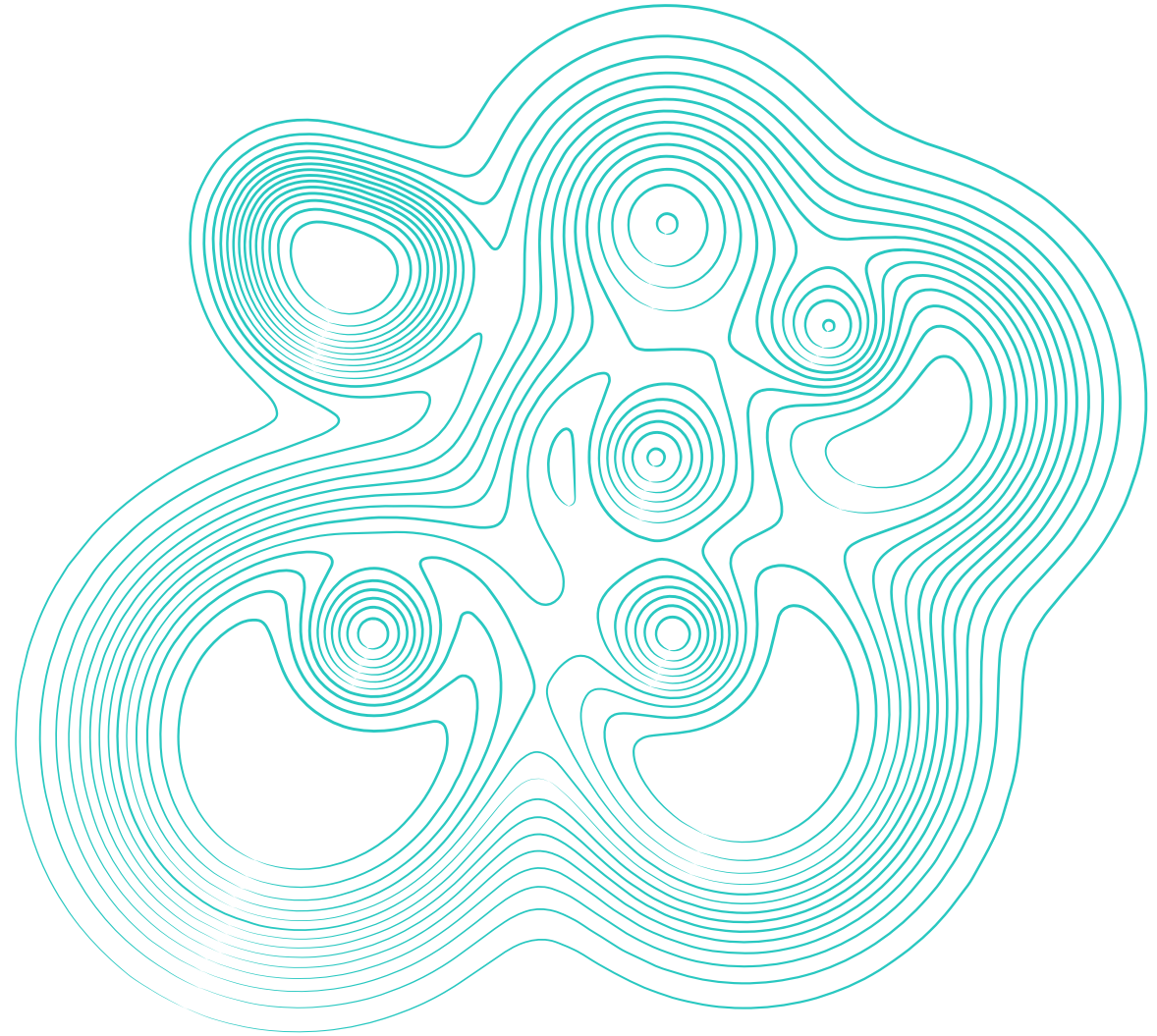
Attributes *(from Supplier POV)*

Purpose	Efficiently conduct business with Worley by engaging with key stakeholders and managing different aspects of the relationship.
Functionality	Suppliers can: <ul style="list-style-type: none">• Manage supplier information.• Update profile and payment information.• Respond to Sourcing Events.
Focus	Interface to interact with buyers across different procurement processes and transactions, including sourcing and supplier management, with potential expansion to purchasing and invoicing in the future.
User Role	Suppliers use to collaborate with Worley buyers.
Account Management	Accounts are managed individually for each supplier, with the option to add multiple users to each account, as necessary.

Note: As of 2025, Worley is utilizing the CSP for Supplier Information Management with Risk Assessments and Sourcing.

COUPA SUPPLIER PORTAL

2. Manage Profile



Coupa Supplier Portal | Manage Profile

A. Business Profile

In the Coupa Supplier Portal, you have a public profile that is visible in the Coupa Supplier Portal Directory. This allows potential Coupa customers to find and view your profile.

To get started with filling out your profile information:

1. Select **Profile** in the top menu.
2. Click **Edit Profile** to take you to the section you want to update and complete your information.

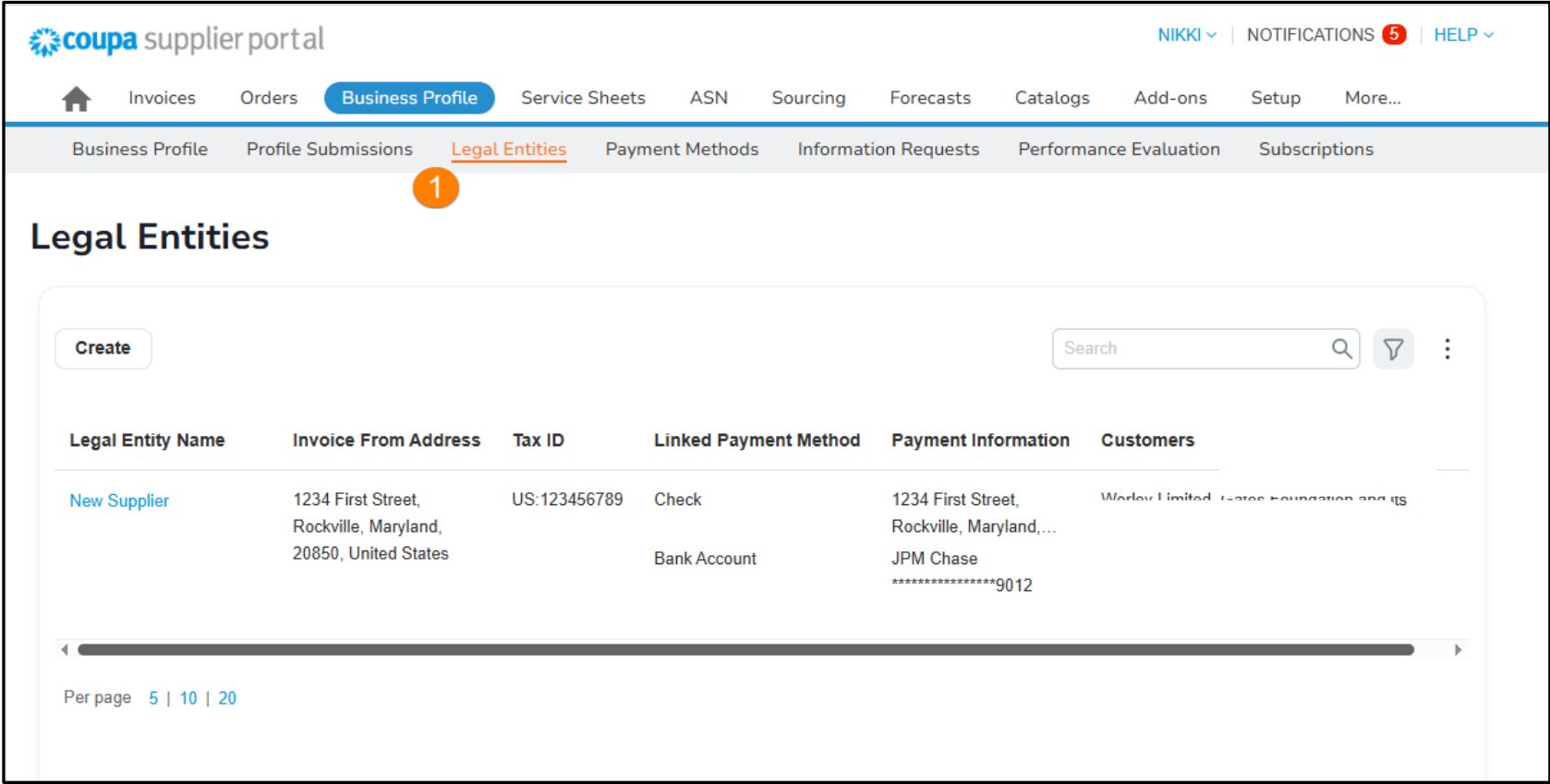
The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the user name 'NIKKI', a notifications bell with a red '5', and a 'HELP' link. Below the header is a navigation bar with tabs: Invoices, Orders, Business Profile (highlighted), Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup, and More... A sub-navigation bar below this contains links: Business Profile (highlighted with an orange circle and the number '1'), Profile Submissions, Legal Entities, Payment Methods, Information Requests, Performance Evaluation, and Subscriptions. A yellow banner with a red exclamation mark icon and the text 'Action Required' is displayed. Below this is a teal banner with the text 'Verify Your Account And Get Noticed' and a 'Get Verified' button. The main content area shows the profile for 'Nikki Consulting Services' with a 'Profile Preview' link, a 'Copy Profile URL' link, a 'Download as PDF' link, and a 'Share Profile' button. Below the profile name is a 'Company Info' section with fields for 'Company Name' (filled with 'Nikki Consulting Services'), 'Industry', and 'About'. An orange circle with the number '2' and a red box around an edit icon (pencil and up arrow) are positioned next to the 'Company Info' section.

TIP: Profile data doesn't automatically update customer request ... see slide 28 for instructions on how to update customer information requests

Coupa Supplier Portal | Manage Profile

B. Legal Entities

1. The legal entities section stores yours most up-to-date information in the Coupa Supplier Portal. This helps streamline the process of completing supplier information requests from customers, as the stored details will automatically populate relevant fields on the forms.



Coupa Supplier Portal | Manage Profile

B.1 Edit /Inactivate Existing Legal Entities

1. Navigate to **Business Profile > Legal Entities**.
2. Hover over the name of your legal entity and select the pencil to edit.
3. The legal entity will open a side window for edits (skip this step if you are here to delete the entity).
4. Once edits are complete – select **SAVE** or **DELETE**.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the 'coupa supplier portal' logo, user 'NIKKI', 'NOTIFICATIONS 5', and 'HELP'. The main navigation menu has 'Business Profile' selected, with sub-menus for 'Invoices', 'Orders', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', 'Setup', and 'More...'. The 'Legal Entities' sub-menu is highlighted with an orange circle '1'. Below this, the 'Legal Entities' page shows a table with columns: 'Legal Entity Name', 'Invoice From Address', 'Tax ID', and 'Linked Payment Method'. A 'New Supplier' entry is listed with a pencil icon, circled with an orange circle '2'. The table data is as follows:

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method
New Supplier	1234 First Street, Rockville, Maryland, 20850, United States	US:123456789	Check Bank Account

An 'Edit Legal Entity' modal is open, circled with an orange circle '3'. It contains the following sections:

- Legal Entity Name:** 'New Supplier'
- Country/Region:** 'United States'
- Tax Registrations:** 'United States', 'Tax ID: 123456789', and a checkbox 'I don't have a Tax ID Number'.
- Invoice From Address:** 'Country/Region: United States', 'Address Line 1: 1234 First Street', 'Address Line 2: ', 'City: Rockville', 'State: Maryland', 'Postal Code: 20850', 'Invoice From Code: ', and 'Preferred Language: English (US)'.
- Ship From Address:** (Section header visible, details below the modal).

At the bottom of the modal are buttons for 'Cancel', 'Delete Legal Entity', and 'Save'. An orange circle '4' is placed next to the 'Save' button.

Coupa Supplier Portal | Manage Profile

C. Payment Methods

1. The Payment methods section in the Coupa Supplier Portal stores your most up-to-date information. This makes it easier to complete supplier information requests from customers, as the stored details can be quickly selected to auto-populate the forms.

NIKKI

NOTIFICATIONS 5

HELP

Home

Invoices

Orders

Business Profile

Service Sheets

ASN

Sourcing

Forecasts

Catalogs

Add-ons

Setup

More...

Business Profile

Profile Submissions

Legal Entities

Payment Methods

Information Requests

Performance Evaluation

Subscriptions

Payment Methods

Add Payment Method

Filter

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Bank	United States	USD	New Supplier		Active	<div>Edit</div> <div>Link</div> <div>Settings</div> <div>Delete</div>
Check	1234 First Street, Rockville, Maryland, 20850, United States			New Supplier	Worley Limited	Active	<div>Edit</div> <div>Link</div> <div>Settings</div> <div>Delete</div>

Per page


5 | 10 | 20


Coupa Supplier Portal | Manage Profile

C.1. Manage Payment Methods

1. Navigate to **Business Profile > Payment Methods**.

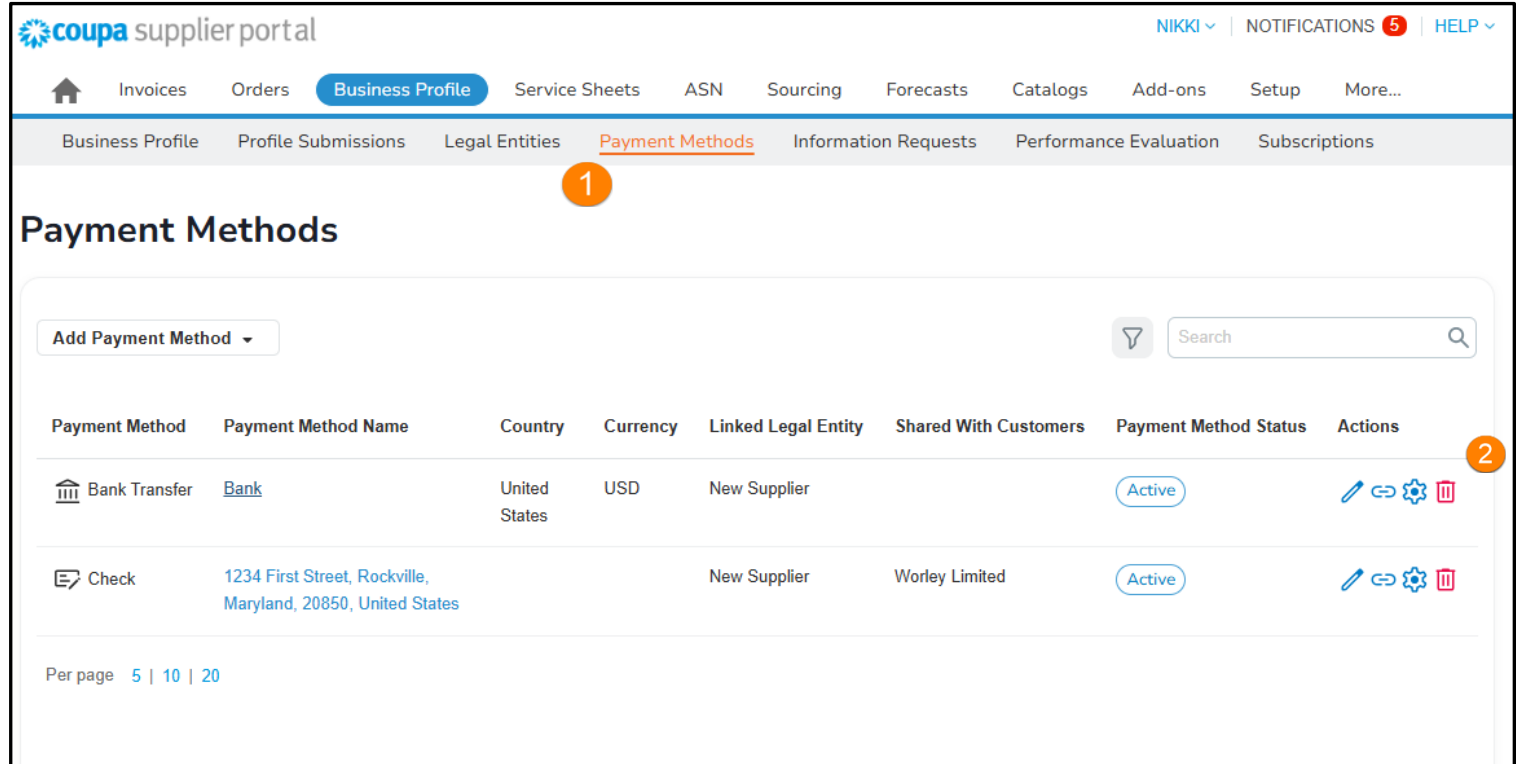
2. Select the ICON for corresponding action

 1. Pencil – Edit Existing











 2. Chain – Share/Remove Customers from Payment Method

 3. Gear – Manage Linked Customers

 4. Trash Can – Delete the Payment Method



The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, user name (NIKKI), notifications (5), and a help link. Below this is a secondary navigation bar with tabs: Invoices, Orders, Business Profile (selected), Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup, and More... The 'Business Profile' tab is active, and the 'Payment Methods' sub-tab is selected, indicated by a red circle '1'. The main content area is titled 'Payment Methods' and features an 'Add Payment Method' button and a search bar. Below these is a table with the following columns: Payment Method, Payment Method Name, Country, Currency, Linked Legal Entity, Shared With Customers, Payment Method Status, and Actions. The table contains two entries: 'Bank Transfer' (linked to 'Bank', United States, USD, New Supplier, Active) and 'Check' (linked to '1234 First Street, Rockville, Maryland, 20850, United States', New Supplier, Worley Limited, Active). Each entry has a set of action icons (pencil, chain, gear, trash) highlighted by a red circle '2'.

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
 Bank Transfer	Bank	United States	USD	New Supplier		Active	   
 Check	1234 First Street, Rockville, Maryland, 20850, United States			New Supplier	Worley Limited	Active	   

Per page 5 | 10 | 20

Coupa Supplier Portal | Manage Profile

D. Customer Profile

In the Coupa Supplier Portal, you have profiles for each of your connected customers, allowing you to manage the information you share with them. Some customers may send you information Requests, which you'll need to complete to update your details for that specific customer.

1. Navigate to **Profile > Information Requests**. You can also access Information Requests by clicking links in notifications.
2. Select your customer from the Profile dropdown menu.
3. Select the most recent form by clicking on the form name.
4. Your Customer form will open and will default with any of the information you have on your profile page (from slide 8).
5. In the Choose Remit-To Address window, you can select **Choose** next to the existing addresses you want to send to your Customer, or you can select **Create New Remit-To Address** to add a new address.
6. Once all supplier information fields are completed, click **Submit for Approval**.

The screenshot displays the Coupa Supplier Portal interface with several numbered callouts (1-6) indicating the steps to manage a customer profile. The interface includes a top navigation bar with 'coupa supplier portal' and user options (NIKKI, NOTIFICATIONS 6, HELP). Below this is a secondary navigation bar with tabs: Invoices, Orders, Business Profile (selected), Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup, and More... A third navigation bar shows sub-tabs: Business Profile, Profile Submissions, Legal Entities, Payment Methods, Information Requests, Performance Evaluation, and Subscriptions. The main content area is titled 'Worley Limited - SAMPLE SUPPLIER' and 'Form Responses'. It features a table with columns: Form, Status, Created Date, and Submitted At. The table contains one row: 'Supplier Profile Form_v7', 'New', '06/10/25', and 'None'. Below the table is a 'Per page' selector (15, 45, 90). A callout box (1) points to the 'Information Requests' tab. A callout box (2) points to the 'Select Customer' dropdown menu. A callout box (3) points to the 'Supplier Profile Form_v7' form name. A callout box (4) points to the 'Supplier Profile Form' section. A callout box (5) points to the 'Remit-To Addresses' section, which includes a message: 'We have auto-filled some information from your Public Profile.' and a button 'Add Remit-To'. A callout box (6) points to the 'Submit for Approval' button. The bottom of the interface shows a 'Supplier Onboarding Guide' section with a link to 'Supplier_Onboarding_Guide.docx' and three buttons: 'Decline', 'Save', and 'Submit for Approval'.

Coupa Supplier Portal | Manage Profile

E. Customer Profile Updates

If your company information changes or requires updating, it must be updated on the Worley Information requests.

1. Navigate to **Profile > Information Requests**. You can also access Information Requests by clicking links in notifications.
2. Select your customer from the Profile dropdown menu.
3. Select the most recently submitted form (in **Applied** status).
4. Verify applied status, scroll to the bottom select **Update Info**.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the 'coupa supplier portal' logo, user name 'NIKKI', a notifications bell icon with '6' items, and a 'HELP' link. The sub-navigation bar highlights 'Business Profile' and includes links for 'Invoices', 'Orders', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', 'Setup', and 'More...'. The main content area is titled 'Worley Limited - SAMPLE SUPPLIER' and shows 'Form Responses'. A table lists submitted forms with columns: 'Form', 'Status', 'Created Date', and 'Submitted At'. The first row shows 'Supplier Profile Form_v7' with a status of 'Applied', a creation date of '06/10/25', and 'None' for the submission date. This row is highlighted with an orange box and labeled '3'. Below the table is a pagination bar indicating 'Per page 15 | 45 | 90'. To the right of the table is a 'Select Customer' dropdown menu labeled '2' with 'Worley Limited - SAMPLE SUPPLIER' selected. At the bottom of the page, there is a 'Update Info' button labeled '4'.

Coupa Supplier Portal | Manage Profile

E. Customer Profile Updates

If your company information changes or needs to be updated, you must make those changes within the Worley Information requests.

Be sure to review all fields – not just the one’s you’re updating.

Note: The following fields must be revalidated or completed each time you update the supplier information form. These fields are required to proceed with the update.

- *Supplier Location
- *Preferred Communication Language
- *Are you identified as a Diverse Supplier?
- *Is your diversity type as "Native/Indigenous Owned"?
- *Is Freight Terms applicable/not applicable?
- *Have you answered any of the previous three questions as "Yes"
- *Are you aware if any of the parent entities, shareholders, ultimate beneficial owners, subsidiaries, or key executives of the third party are sanctioned by any jurisdiction or have any connections with sanctioned entities or countries?
- *Are any of the following raw materials contained in the supplier's products?
- *Does the supplier source the products or the raw materials from any of the following countries: North Korea, Eritrea, Mauritania, Saudi Arabia, Turkiye, Tajikistan, United Arab Emirates, Russia, Afghanistan, and Kuwait?

- *Does the supplier require use of any low skilled or migrant labor?
- *Will the landlord be engaging any cleaning, maintenance, security and/ or other support staff?
- *Does the third party have an established process to conduct due diligence on its sub-contractors/suppliers to identify bribery, corruption and modern slavery red flags?
- *Does the third party have a written policy addressing bribery, corruption, and other unethical business practices related risks?
- *Does the third party have a written policy addressing modern slavery and human rights related risks?
- *Does this form correspond to an update?

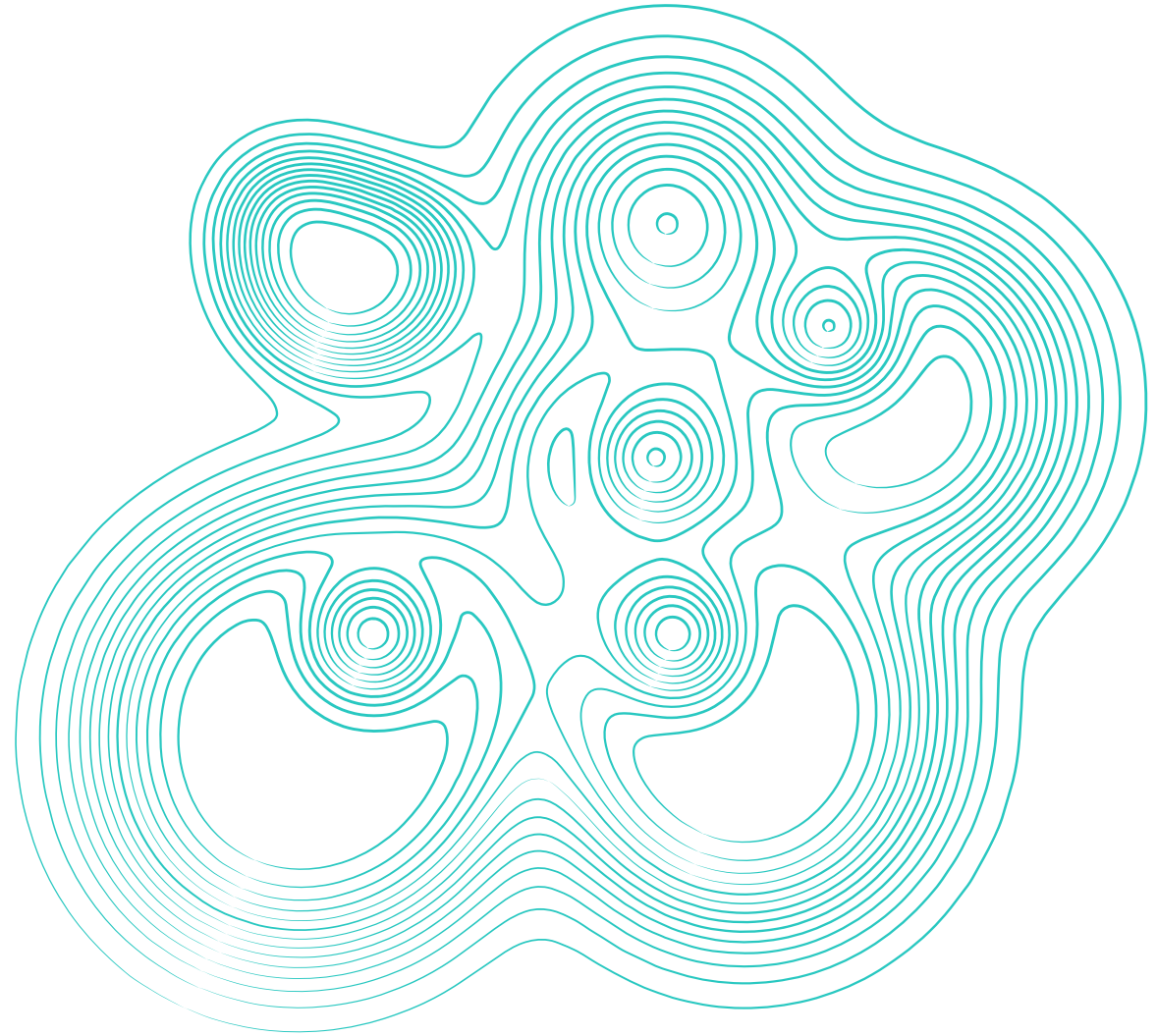
5. Once you have updated the information needed and completed the fields above click **Submit for Approval**.

The screenshots illustrate the process of updating a supplier profile in the Coupa Supplier Portal:

- Step 1:** The user is on the 'Business Profile' page for 'Worley Limited - SAMPLE SUPPLIER'. The 'Business Profile' tab is highlighted in the top navigation bar.
- Step 2:** The 'Select Customer' dropdown menu is highlighted, showing 'Worley Limited - SAMPLE SUPPLIER'.
- Step 3:** The 'Form Responses' table is shown. The 'Supplier Profile Form_v7' is highlighted in the table. The table has columns: Form, Status, Created Date, Submitted At.
- Step 4:** The 'Update Info' button is highlighted at the bottom of the form.
- Step 5:** The 'Submit for Approval' button is highlighted at the bottom of the form.

COUPA SUPPLIER PORTAL

3. Homepage



Coupa Supplier Portal | Homepage

Coupa Homepage – Profile Summary

In the Coupa Supplier Portal Homepage, the following details are displayed:

- **Recent Activity**
- **Announcements** - Your customers can create announcements to communicate with you about initiatives, promotions, and changes required for your collaboration through the portal.
- **Two Factor Security**
- **Join Requests**
- **Merge Suggestions** – Your company might have multiple accounts or profiles in the portal. This can occur when several users from the same organization register or are invited to the Coupa Supplier Portal using different email addresses.
- **Linked Customers** – Displays the count of your linked customers in the portal.

The screenshot displays the Coupa Supplier Portal homepage for a user named Nikki. The top navigation bar includes the Coupa logo, the text 'supplier portal', and user information 'NIKKI' with a dropdown arrow, 'NOTIFICATIONS' with a red badge showing '6', and a 'HELP' link with a dropdown arrow. Below this is a secondary navigation bar with icons and labels for 'Invoices', 'Orders', 'Business Profile', 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', 'Setup', and 'More...'. The main content area features a teal banner with the text 'Verify Your Account And Get Noticed' and a 'Get Verified' button. Below the banner is the user's profile for 'Nikki Consulting Services' with a 'Get Verified' button and a note that the profile was last updated 8 months ago. The 'Recent Activity' section shows a list of activities, including 'Worley Limited - Nikki Consulting...' and 'Worley Limited - SAMPLE SUPPL...'. The 'Announcements' section shows 'No Announcements'. At the bottom, there are four summary cards: 'Multi Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (3 Connections).

coupa supplier portal

NIKKI | NOTIFICATIONS 6 | HELP

Home Invoices Orders Business Profile Service Sheets ASN Sourcing Forecasts Catalogs Add-ons Setup More...

Verify Your Account And Get Noticed

Coupa Verified builds trust and gets you in front of more customers looking for products like yours. **Get Verified**

NC Nikki Consulting Services Get Verified

Profile Last Updated: 8 months ago | [View Profile](#)

Recent Activity View ⓘ

Worley Limited - Nikki Consulting... Worley Limited - SAMPLE SUPPL... More...

Sourcing Event Event participation request on TEST RFQ-04 JUN - VISHAKHA : RELIEF VALVES Jun 09

Worley Limited - Nikki Consulting Services • Event participation request on TEST RFQ-04 JUN - VISHAKHA : RELIEF VALVES

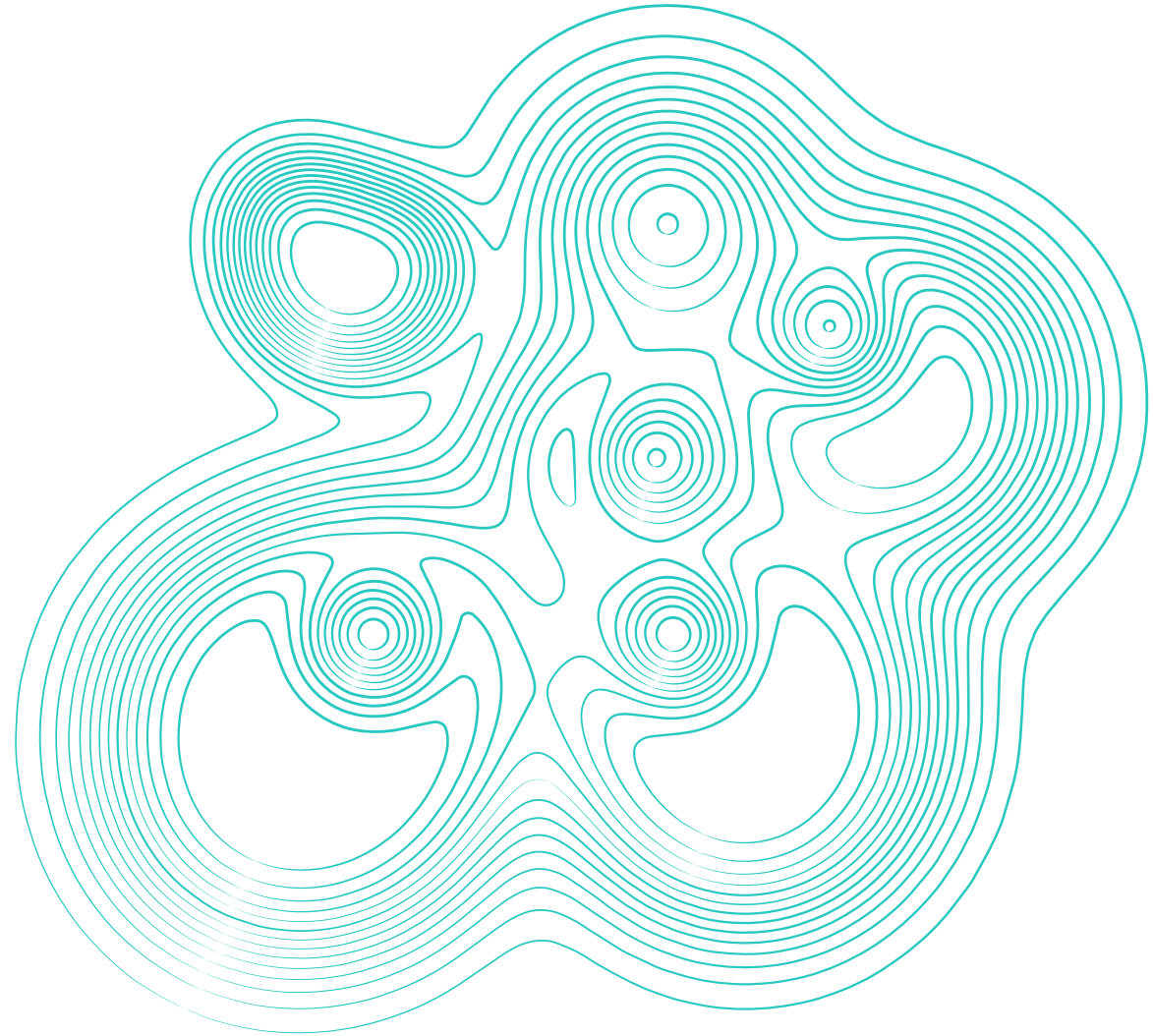
Announcements

No Announcements

Multi Factor Security	Join Requests	Merge Suggestions	Linked Customers
0 of 1 Users	0 Users	0 Duplicates	3 Connections

COUPA SUPPLIER PORTAL

4. Manage Account Settings



Coupa Supplier Portal | Notification Preference

Each Coupa Supplier Portal user will receive notifications based on their individual notification preferences. Users can choose which notifications they want to receive and select their preferred delivery channel-Online (within the Coupa Supplier Portal), Email, or SMS.

Steps on how to setup notification preferences:

1. Next to your username, click **Notifications** then select **Notification Preferences**.
2. Choose the types(s) of notifications you want to receive and select your preferred channel(s) for delivery- such as Online (Coupa Supplier Portal), Email, or SMS.

The screenshot displays the Coupa Supplier Portal interface. At the top, the user is logged in as APRIL MICAH, with a NOTIFICATIONS 0 badge and a HELP link. The navigation bar includes links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. The 'Setup' link is highlighted in the navigation bar. A 'Notification Preferences' button is circled in orange with a '1' in a circle. Below this, the 'Account Access' section contains a table with checkboxes for 'Request to Join' and 'Merge Request' for 'Online', 'Email', and 'SMS'. The 'Email' checkbox is checked for both. A '2' in a circle is next to the 'Email' column. The 'Announcements' section has a table with checkboxes for 'New Customer Announcement' for 'Online', 'Email', and 'SMS'. The 'Online' checkbox is checked. The 'Business Performance' section has a table with checkboxes for 'Business Performance Role Granted' for 'Online', 'Email', and 'SMS'. The 'Online' checkbox is checked.

Notification Type	Online	Email	SMS
Request to Join	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Merge Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New Customer Announcement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Performance Role Granted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Coupa Supplier Portal | My Account

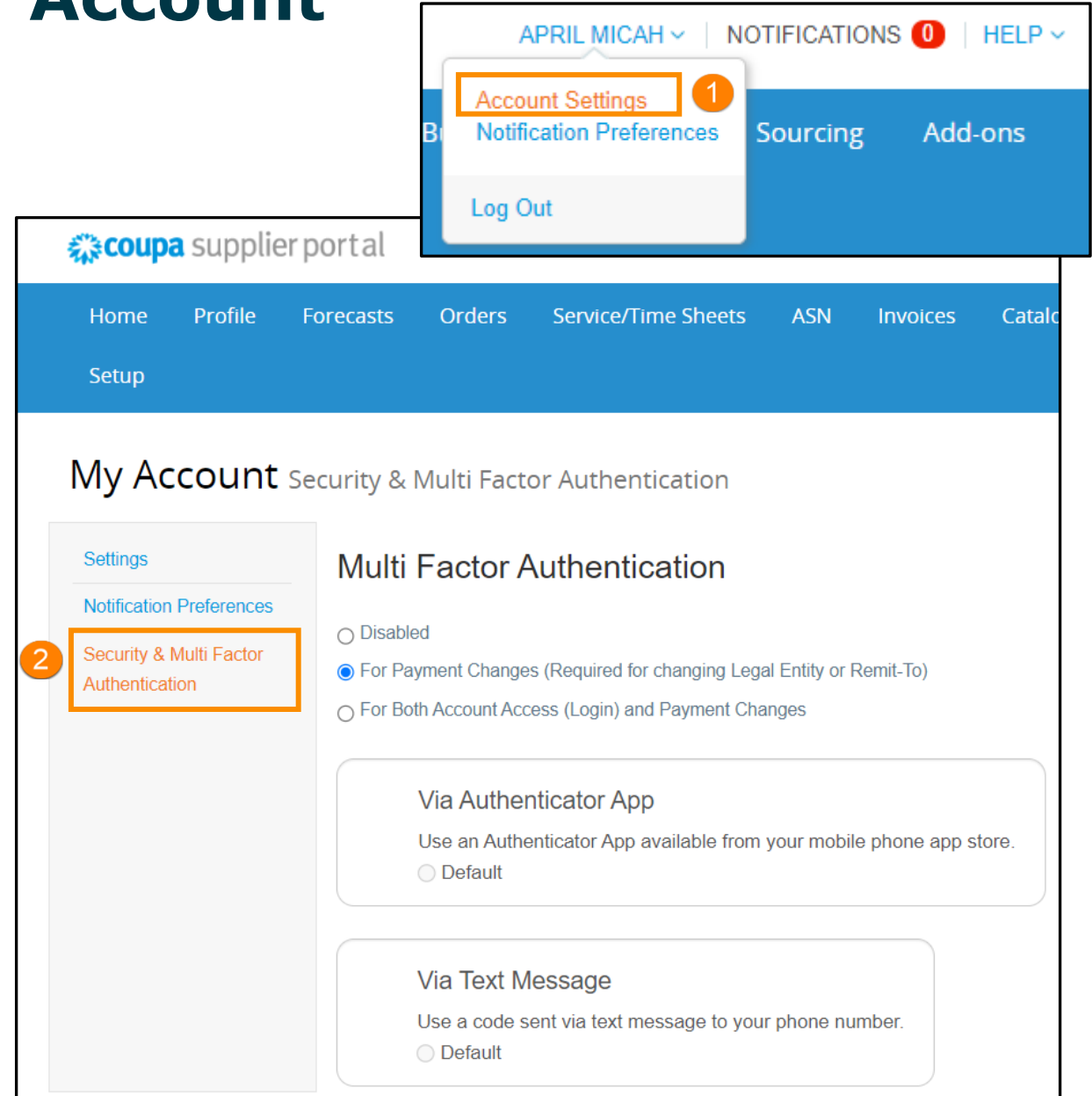
Coupa Security & Multi-Factor Authentication

When the Supplier logs in for the first time, they are required to set-up two-factor authentication.

If they have enabled multi-factor authentication for SMS, check text messages to get the verification code.

The Supplier can also enable multi-factor authentication by following the below steps:

1. Hover your mouse on your username and click **Account Settings**.
2. Click **Security & Multi Factor Authentication**.



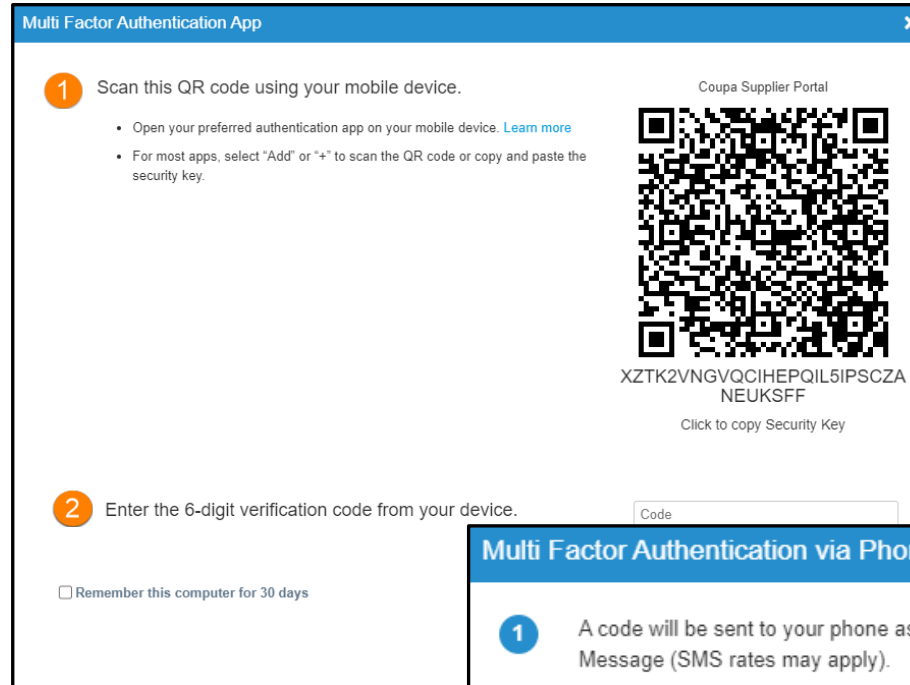
Coupa Supplier Portal | My Account

If Via Authentication App

1. Scan QR using your device.
2. Enter the 6-digit verification code from your device.

If Via Text Message

1. Enter the Cell Phone Number to receive the SMS notifications.
2. Confirm the reCAPTCHA then click **'Send Code'**.
3. Enter the 6-digit verification code sent to your phone.




Multi Factor Authentication App

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. [Learn more](#)
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal

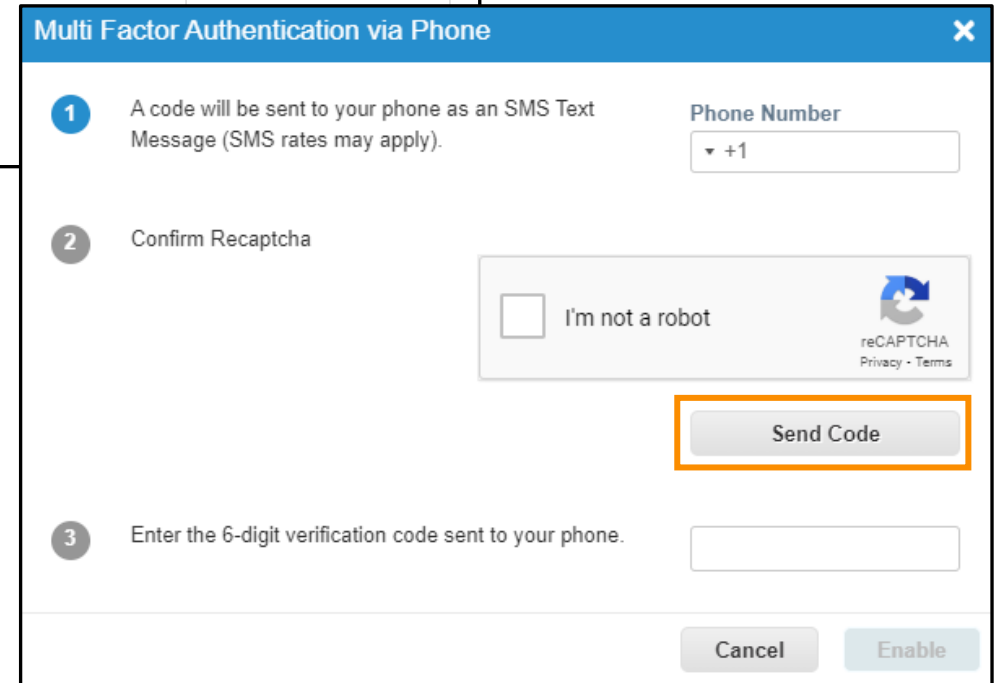


XZTK2VNGVQCIHEPQIL5IPSCZA
NEUKSFF

Click to copy Security Key

2 Enter the 6-digit verification code from your device.

☐ Remember this computer for 30 days



Multi Factor Authentication via Phone

1 A code will be sent to your phone as an SMS Text Message (SMS rates may apply).

Phone Number

2 Confirm Recaptcha

☐ I'm not a robot

reCAPTCHA
Privacy - Terms

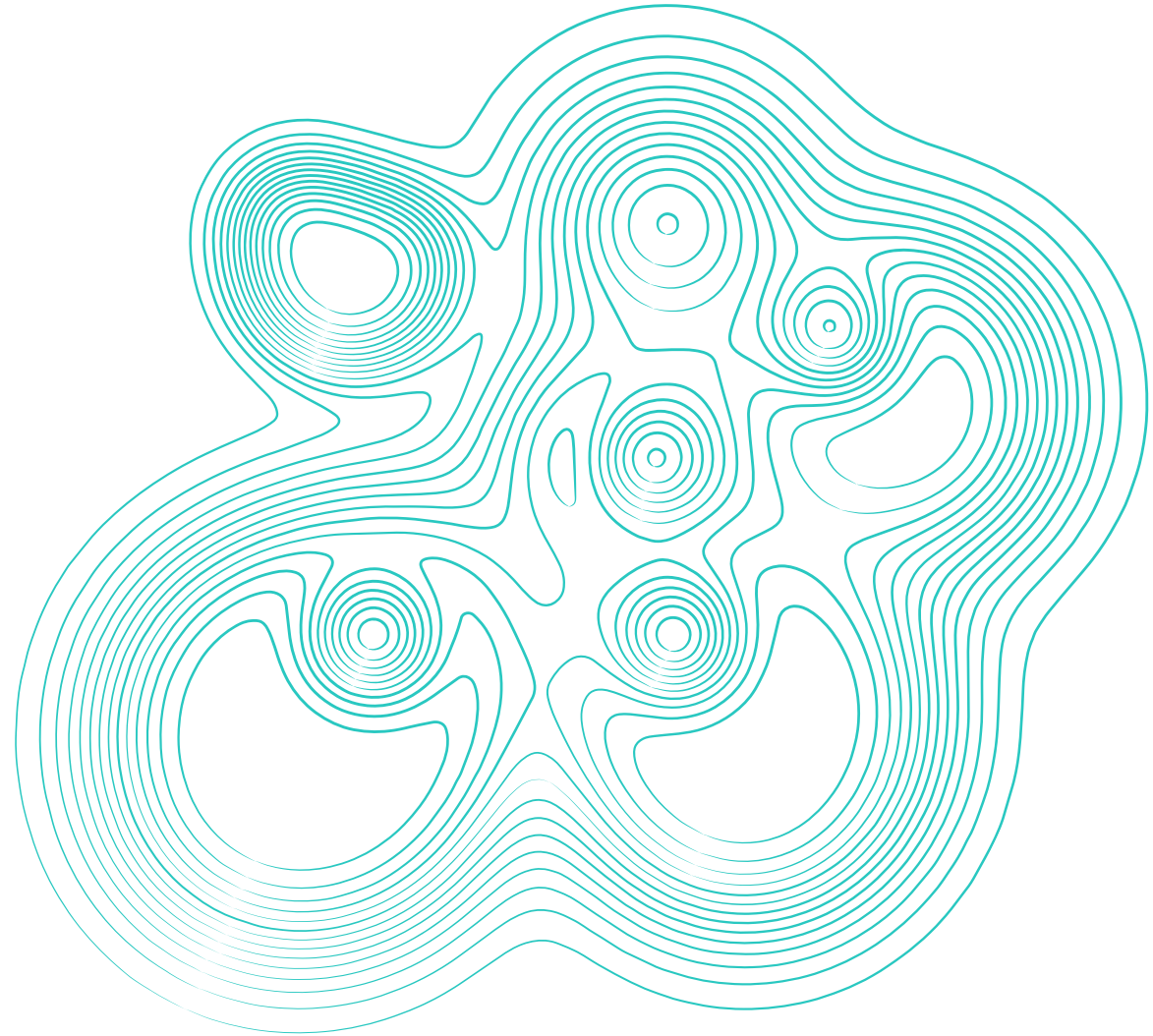
Send Code

3 Enter the 6-digit verification code sent to your phone.

Cancel Enable

COUPA SUPPLIER PORTAL

5. Admin Setup



Coupa Supplier Portal | Setup Admin

Navigate to **Setup > Admin** to manage users and merge requests, and the remit-to addresses for your customers, and other transactions within the portal.

A. Users

Invite new users and manage what each user can do in the CSP and which customers your users can interact with.

1. Navigate to **Setup > Admin**
2. Navigate to Users section and click **Invite User**
3. Add **First Name**, **Last Name** and **Email**
4. Tick/Untick Permissions and select customer Name
5. Click **Send Invitation**

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'NIKKI', 'NOTIFICATIONS 6', and 'HELP'. Below this is a secondary navigation bar with links: Invoices, Orders, Business Profile, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup (highlighted), and More... The main content area is titled 'Admin Users' and contains a sidebar with links: Users (highlighted), Worker Portal Access, Merge Requests, Merge Suggestions, Requests to Join, Fiscal Representatives, Payment Methods, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The 'Invite User' button is highlighted with an orange box and labeled '2'. Below it is a table with columns 'User Name' and 'Email', containing the entry 'Nikki Biersdorfer' and 'Nikki.biersdorfer+NewAccount@gmail.com'. The 'Invite User' modal is open, showing fields for 'First Name' (labeled '3'), 'Last Name', and '* Email'. It also has sections for 'Permissions' (labeled '4') and 'Customers'. The 'Permissions' section has checkboxes for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The 'Customers' section has checkboxes for 'All', 'Worley Limited - XQuared Roofing Materials v6', and 'Worley Limited - XQuared Roofing Materials v4'. At the bottom of the modal are 'Cancel' and 'Send Invitation' (highlighted with an orange box and labeled '5') buttons.

Coupa Supplier Portal | Admin Setup

B. Merge Requests

This is intended for companies with multiple accounts to help minimize confusion for both existing and potential customers.

1. Navigate to **Setup** tab
2. Click **Merge Requests**
3. Enter **Email** and Click **Request Merge**
4. On the opening popup window, Choose who will become the Account owner.
5. Add **Note to Recipient** and verify Captcha
6. Click **Send Request**

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, 'supplier portal', and user information (NIKKI, NOTIFICATIONS 6, HELP). The main navigation menu lists various sections: Invoices, Orders, Business Profile, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup (highlighted), and More... The 'Admin' section is active, and the 'Merge Requests' link is highlighted in the left sidebar. The main content area shows the 'Initiate Merge Request' form. A text input field contains the email 'coupa@coupamail.edu'. Below it is a reCAPTCHA challenge with the text 'I'm not a robot'. A warning message states: 'Merging will join the accounts and give all combined information to linked customers on behalf of your company. email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.' A blue 'Request Merge' button is visible. Below the form is a section for 'Open merge requests' which shows 'All clear! No open merge requests.' A modal window titled 'Request Account Merge' is open, showing the process of merging accounts. It lists 'My Account' and 'Their Account' with their respective details. The 'Merged Account' section shows the combined information. The 'Account Owner' section has radio buttons for 'My Account' (selected) and 'Their Account'. A 'Note For Recipient' field is present. A second reCAPTCHA challenge is shown with the text 'Verification expired. Check the checkbox again.' and 'I'm not a robot'. A 'Send Request' button is at the bottom of the modal.

Admin Merge Requests

Initiate Merge Request

coupa@coupamail.edu

☐ I'm not a robot

Request Merge

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with XQuared Roofing Materials. Choose who will become the owner of the merged account.

My Account

- My users
- My customers
- My payment information
- My public profile

Their Account

- Their users
- Their customers
- Their payment information
- Their public profile

Merged Account

As the account owner, I will administer

- All combined users
- All combined customers
- All combined payment information

They will administer only

- Their users
- Their customers
- Their payment information

The merged account will use

- My public profile

* Account Owner ☒ My Account ☐ Their Account

* Note For Recipient

Send Request

Coupa Supplier Portal | Admin

B.1 Respond to Merge Account Request

1. From **Admin** page, select **Merge Requests**
2. Navigate to Open Merge Requests and Click **Respond**
3. When the popup window opens, either accept or reject the request

Open merge requests		
Requested 06/20/24	XQuared Roofing Materials v6 Seafood St New York 4029 United States	Initiated From Other Company 2 Respond

When you choose either your account or the other account as the account owner, the Coupa Supplier Portal displays a visual overview of data ownership following a merge.

Merging accounts is a permanent action and cannot be reversed. Please proceed with caution and ensure that the account you're merging with belongs to your organization.

Merge Request

April Micah Esteron of [XQuared Roofing Materials v6](#) has requested to merge with your Coupa Supplier Portal account. By accepting this request, the administrator of XQuared Roofing Materials v6 will become the new account owner.

My Account

- My users
- My customers
- My payment information
- My public profile

Their Account

- Their users
- Their customers
- Their payment information
- Their public profile

Merged Account

As the account owner, they will administer

- All combined users
- All combined customers
- All combined payment information

I will administer only

- My users
- My customers
- My payment information

The merged account will use

- Their public profile

Users with access to merged account: April Micah Esteron ([xquaredroofing+12@gmail.com](#))

Note from requester: A

Add note for requester:

☐ I recognize the email address above as a coworker at my company, and I agree to merge

! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Only accept this request if you confirm this user is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel **Reject** Accept

Coupa Supplier Portal | Admin Setup

C. Fiscal Representatives

Add the necessary fiscal representatives if you operate in a country or region where you are not legally registered but require representation for tax purposes.

C.1 Add a Fiscal Representative

1. Navigate to **Setup > Admin > Fiscal Representatives**.
2. Select **Add Fiscal Representative**.
3. In the window that appears, fill in at least the mandatory address fields marked with a red asterisk: address line 1, city, postal code, country/region, and VAT ID.
4. Select **Continue**.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, user name (NIKKI), notifications (6), and a help link. The main navigation bar contains links for Invoices, Orders, Business Profile, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup (highlighted), and More... Below this, a sub-navigation bar shows Admin (highlighted) and Connection Requests. The main content area is titled 'Admin Fiscal Representatives' and features a table with columns: Name, Country/Region, Tax ID, and Associated Tax Registrations. A sidebar on the left lists various administrative tasks, with 'Fiscal Representatives' highlighted. A modal window titled 'Fiscal Representatives' is open, showing fields for Name, Code, Address (Address Line 1, Address Line 2, City, State, Postal Code, Country/Region, VAT ID), and Contact (First Name, Last Name, Email, Work Phone, Mobile Phone, Fax Number, Web Site). The 'Continue' button at the bottom right of the modal is highlighted.

Admin Fiscal Representatives

None

Name	Country/Region	Tax ID	Associated Tax Registrations
------	----------------	--------	------------------------------

Fiscal Representatives

Name

Code

Address

* Address Line 1

Address Line 2

* City

State

* Postal Code

* Country/Region

* VAT ID

Contact

First Name

Last Name

Email

Work Phone

Mobile Phone

Fax Number

Web Site

Cancel **Continue**

Coupa Supplier Portal | Admin Setup

C.2 Edit or Deactivate a Fiscal Representative

1. Navigate to **Setup > Admin > Fiscal Representatives**.
2. Select **Manage** next to the fiscal representative you want to modify or deactivate.
You can modify the Contact fields. To change the other fields, create a new fiscal representative.
3. Select **Deactivate** to deactivate the fiscal representative or modify the fields you want to change and select **Continue**.

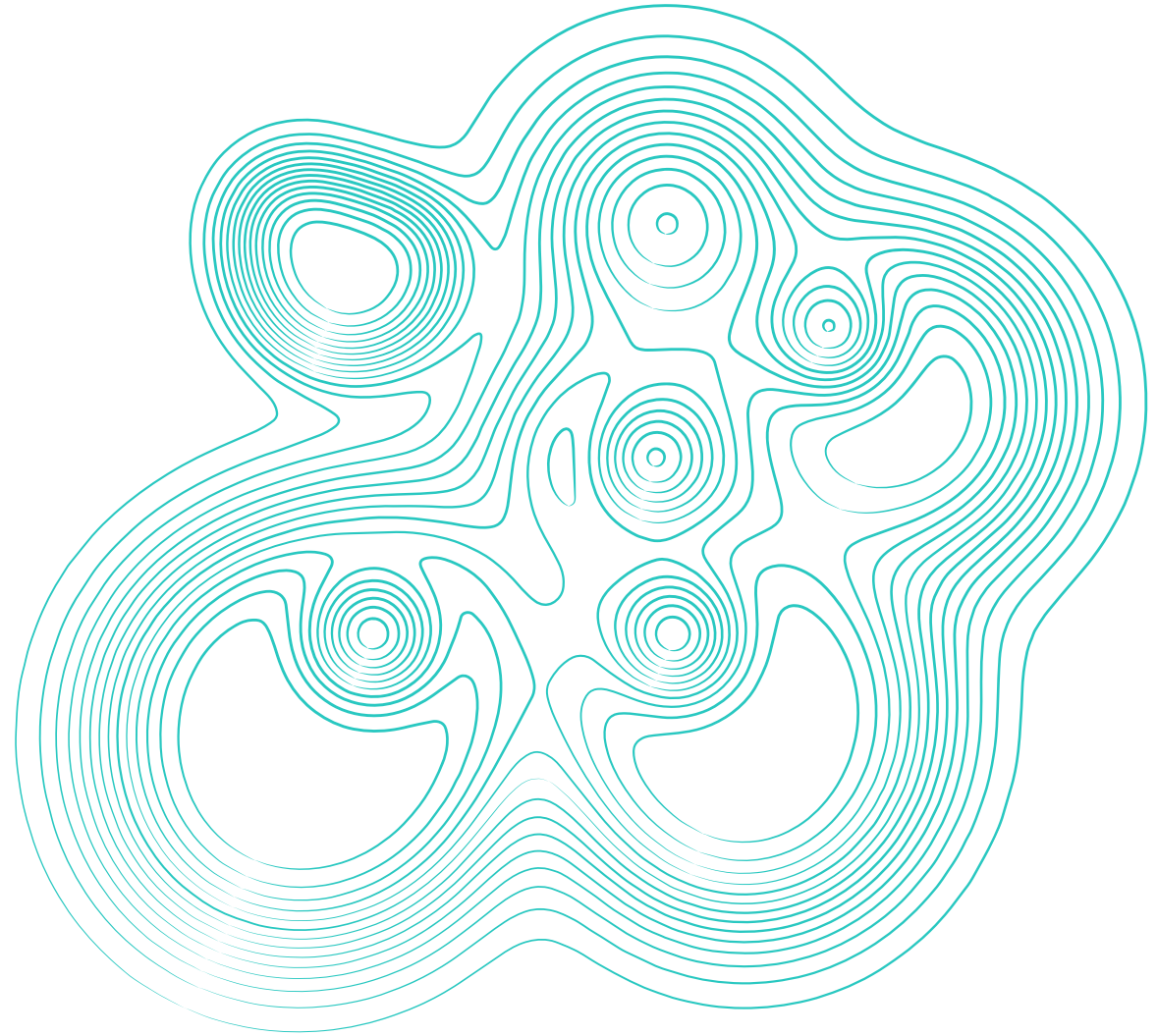
The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, 'supplier portal', and user information (NIKKI, NOTIFICATIONS 6, HELP). The main navigation bar includes links for Invoices, Orders, Business Profile, Service Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, Setup (highlighted), and More... The 'Admin' section is active, showing 'Fiscal Representatives'. A table lists representatives with columns: Name, Country/Region, Tax ID, and Associated Tax Registrations. A 'Manage' button is next to each row. A 'Deactivate' button is visible at the bottom right.

Name	Country/Region	Tax ID	Associated Tax Registrations
Nikki Biersdorfer	United States	12334	
	United States	124	




Buttons: **Deactivate**, **Cancel**, **Continue**

COUPA SUPPLIER INFORMATION MANAGEMENT (SIM)

1. Invitations



Coupa Supplier Information | 3 Ways to Respond


		
Direct SIM Invitation	CSP Linked Update	Forwarded Invitation from a Coworker
Worley will send a customized onboarding email and SIM form to the supplier, allowing them to register through the Coupa Supplier Portal and complete the creation and validation of their supplier information	Suppliers should set up their accounts in advance. Once Worley requests an information update, you will be able to respond using your existing CSP Account.	Suppliers can forward the invitation to others within their organization to assist with completing the Supplier information update.

The Worley Invitation

When joining the Worley supplier network in Coupa, an invitation and request for information will be sent to the primary contact on file.

If you are new to Coupa: Select the Join & Respond button within the invitation to create your supplier portal account.
If you are already on Coupa: You will receive notification to login to continue

New to Coupa
(Start At Step 1)



Profile Information Request


Hello Supplier,
Worley Limited wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.
Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.
You can easily update your company information if it ever changes, as well as do things with (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.
To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.
Welcome!


Join and Respond

Already In Coupa
(Start at Step 10)

You are Connected to Worley Limited on Coupa Inbox x

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to me ▾

 You are Connected to Worley Limited on Coupa

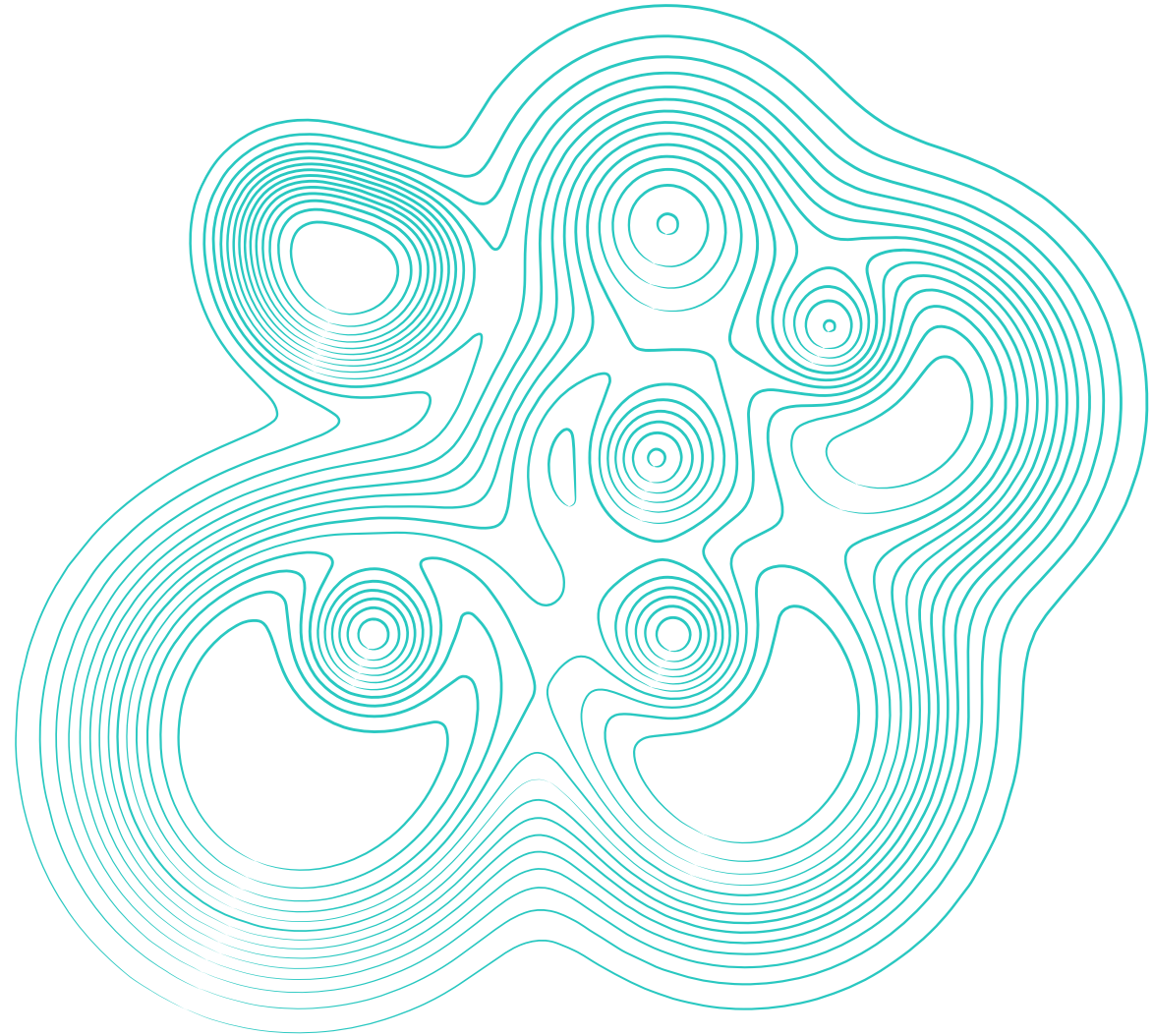
Powered by 

Hello Supplier,
Worley Limited wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.
Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.
You can easily update your company information if it ever changes, as well as do things with (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.
To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.
Welcome!

Log In

COUPA SUPPLIER INFORMATION MANAGEMENT

2. Supplier Information Management



New to Coupa | Supplier Information Management - Invitation

1. Select Join and Respond from the Worley invitation.
2. Suppliers will then be redirected to Coupa Supplier Portal to complete their profile.

To continue you will need the following information types**:

- Tax Certifications
- Banking Information
- Company Addresses

3. If you need to forward to another person in your company, select "forward to someone" .

**Coupa takes your data security seriously, if you would like to read more about the compliance and security measures click [here](#)

2 Create an Account

Worley Limited is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Worley Limited so you're ready to do business together.

* Business Name
Nikki Consulting Services
Your legal business name (or legal personal name if an individual)

* Email
Nikki.biersdorfer+NewAccount@gmail.com

* First Name
Nikki

* Last Name
Biersdorfer

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

* Confirm Password

* Country/Region
▼

* Tax Registration ⓘ
#####

☐ I do not have a Tax ID

☐ I accept the [Privacy Policy](#) and the [Terms of Use](#)

Create an Account

Already have an account? [LOG IN](#)

[Forward this to someone](#)

1 Profile Information Request

Worley

Hello Supplier,

Worley Limited wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

You can easily update your company information if it ever changes, as well as do things with (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.

Welcome!

Join and Respond

3

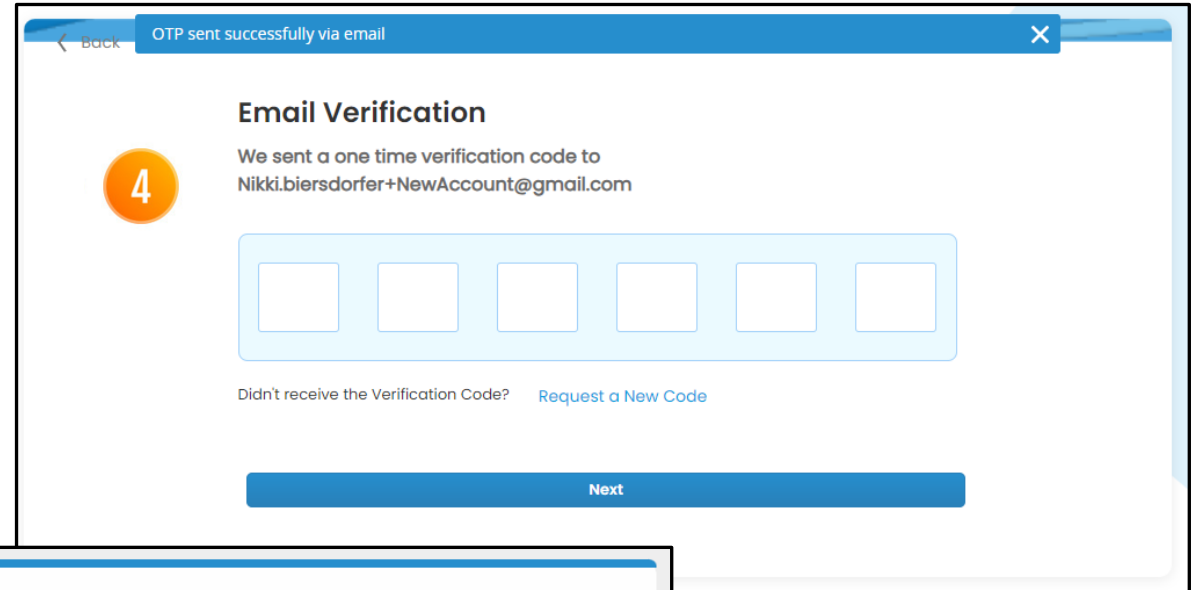


Click here for:

Potential Supplier Information Fields
(expected to be entered by suppliers)

New to Coupa | Supplier Information Management - Invitation

4. After clicking Create an Account, a verification code will need to be entered.
5. You will receive an email for a verification code (this confirmed the email entered is correct).



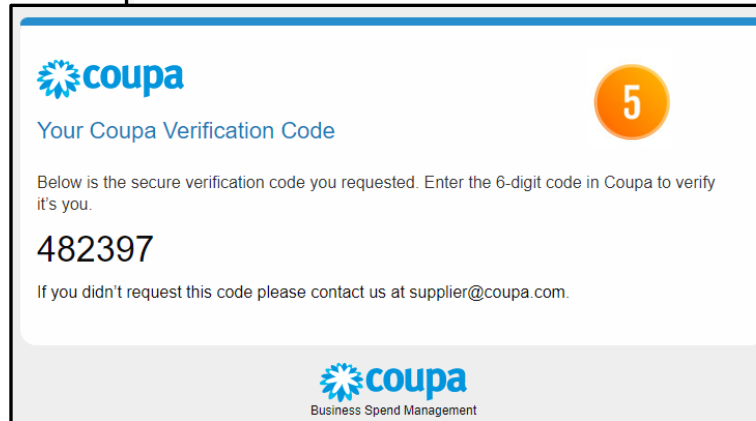
OTP sent successfully via email


Email Verification

We sent a one time verification code to
Nikki.biersdorfer+NewAccount@gmail.com

Didn't receive the Verification Code? [Request a New Code](#)

Next




 **coupa**

Your Coupa Verification Code

Below is the secure verification code you requested. Enter the 6-digit code in Coupa to verify it's you.

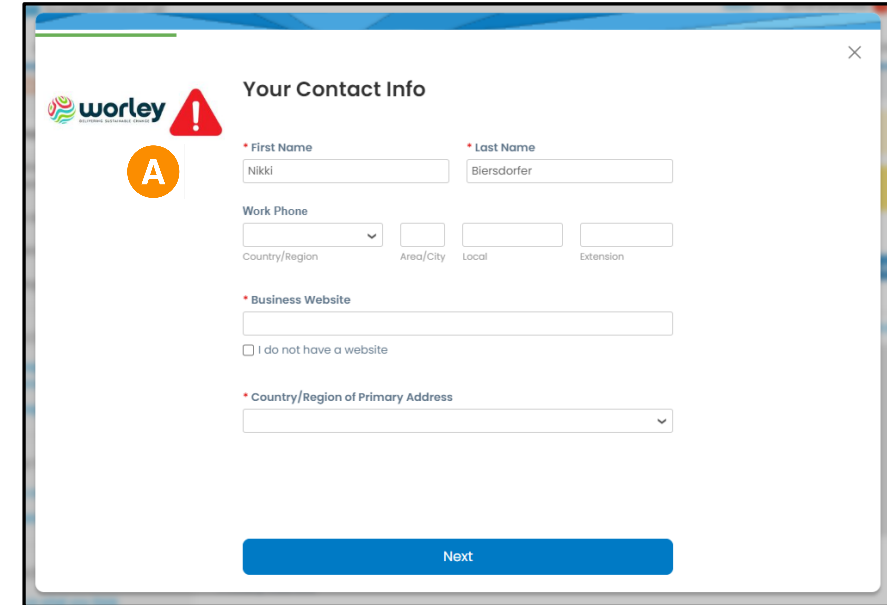
482397

If you didn't request this code please contact us at supplier@coupa.com.


 **coupa**
Business Spend Management

New to Coupa | Supplier Information Management - Invitation

6. Coupa will ask you for CSP (Coupa Supplier Portal) Account Information.
 - A. Contact Information will be first and this is required (once completed here, it will also default on your supplier information form for the Worley onboarding process).
 - B. Additional sections such as 'Making sure you get paid' will appear and are optional if you choose the "skip for now" option.



The screenshot shows the 'Your Contact Info' form. It includes fields for First Name (Nikki), Last Name (Biersdorfer), Work Phone (Country/Region, Area/City, Local, Extension), Business Website, and Country/Region of Primary Address. A blue 'Next' button is at the bottom.

Worley  **Your Contact Info**

*** First Name**
Nikki

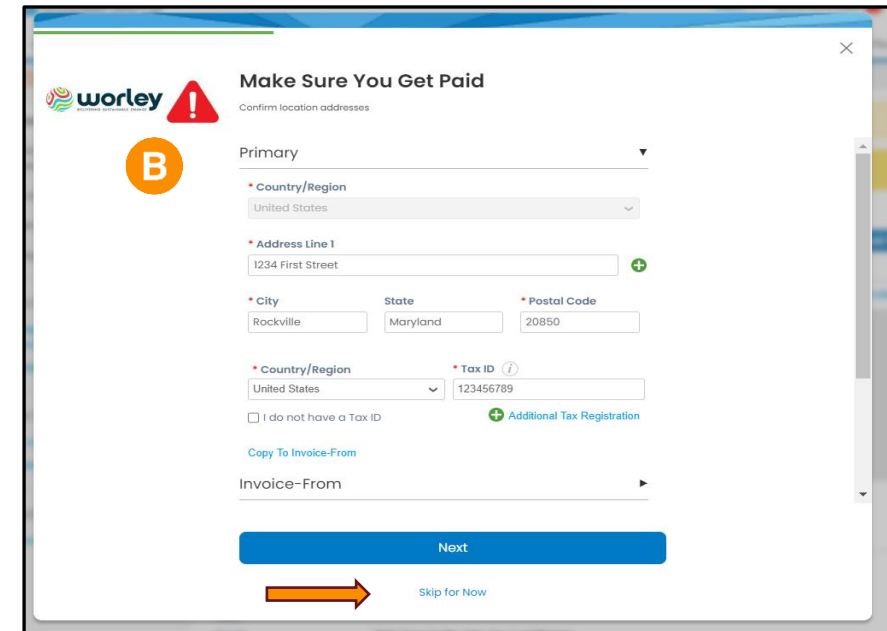
*** Last Name**
Biersdorfer

Work Phone
Country/Region: [dropdown] Area/City: [dropdown] Local: [dropdown] Extension: [dropdown]


*** Business Website**
[text input]
☐ I do not have a website

*** Country/Region of Primary Address**
[dropdown]

Next



The screenshot shows the 'Make Sure You Get Paid' form. It includes fields for Primary Country/Region (United States), Address Line 1 (1234 First Street), City (Rockville), State (Maryland), Postal Code (20850), Country/Region (United States), and Tax ID (123456789). A blue 'Next' button is at the bottom, and a red arrow points to the 'Skip for Now' link.

Worley  **Make Sure You Get Paid**
Confirm location addresses

Primary [dropdown]

*** Country/Region**
United States

*** Address Line 1**
1234 First Street


*** City** Rockville **State** Maryland *** Postal Code** 20850

*** Country/Region** United States *** Tax ID** 123456789
☐ I do not have a Tax ID [Additional Tax Registration](#)

[Copy To Invoice-From](#)

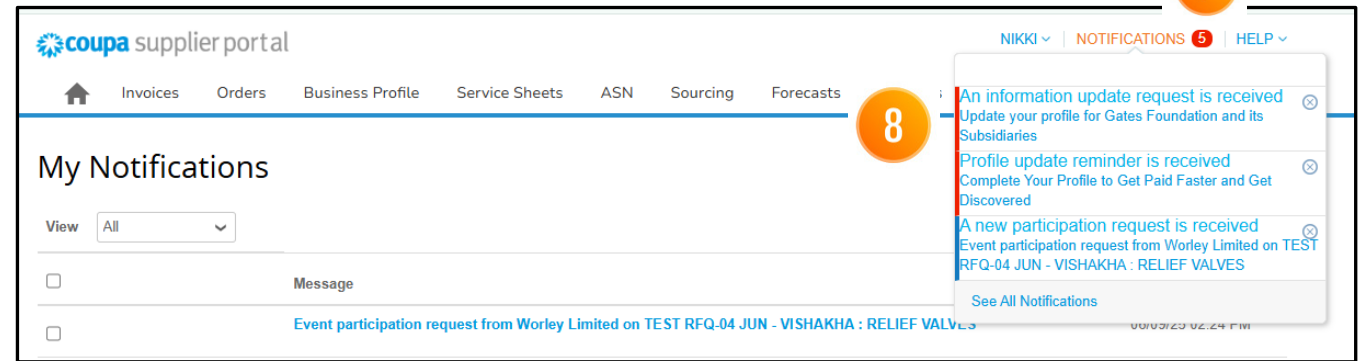
Invoice-From [dropdown]

Next

 [Skip for Now](#)

New to Coupa | Supplier Information Management - Invitation

7. At the top left, you will see the word Notifications, click here.
8. Under My notifications you will have an invitation to connect with Worley, if you click on the word Notifications, you will see the most recent notification. From here if you select the Worley invitation, you will be directed to the form. It is here you will start answering questions that are applicable to your company.
9. If you do not see the Worley notification in recent list, select the 'See All Notifications' and you will be directed to all notifications – once you have located the Worley notification select the message to be directed to the form.



9

The screenshot shows the 'Worley Limited' profile form in the Coupa Supplier Portal. The top navigation bar includes 'coupa supplier portal', a home icon, and links for 'Invoices', 'Orders', 'Profile', 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below the navigation bar, the 'Worley Limited' section has a 'Profile' dropdown set to 'Worley Limited'. The form includes a message: 'We have auto-filled some information from your Public Profile.' and a warning: 'Choose the correct State or Region unless you need to keep the current value.' The form sections are 'Supplier Profile Form v22', 'Form 2: Supplier Profile Form', 'Supplier Information', and 'Supplier Profile Form'. The 'Company Name' field is highlighted with a red circle and the number 9, and the 'Company Trading Name' field is also highlighted with a red circle and the number 9.

New to Coupa | Supplier Information Management - Invitation

10. This supplier information request is also accessible through your Coupa Supplier Portal.

- A. Select Profile
- B. Select Information Requests
- C. Confirm Worley is the Profile Selected

11. Fields with a * are required. Also, there will be conditional fields that will appear as needed based on your answers.

- D. The next section of this deck will outline all the fields included on the forms.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and user information 'JOE' with a dropdown arrow, 'NOTIFICATIONS 1', and 'HELP' with a dropdown arrow are on the right. Below the header is a navigation bar with links: Home, Invoices, Orders, Profile (highlighted with a blue circle 'A'), Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More... Below this is a sub-navigation bar with links: Your Profile, Information Requests (highlighted with a blue circle 'B'), Performance Evaluation, and Subscriptions. The main content area shows 'Worley Limited' (highlighted with a blue circle 'B') and a 'Profile' dropdown menu set to 'Worley Limited' (highlighted with a blue circle 'C'). Below this is a green success message: 'We have auto-filled some information from your Public Profile.' followed by a yellow warning message: 'Choose the correct State or Region unless you need to keep the current value.' The form is titled 'Supplier Profile Form v22' and 'Form 2: Supplier Profile Form'. Under 'Supplier Information', the text 'X-Machina' is visible. The 'Supplier Profile Form' section contains two required fields (marked with an asterisk): '* Company Name' and '* Company Trading Name', both with 'Supplier Example' entered. A note below these fields says 'Populate if different from Company Name'. A teal tip box on the right states: 'TIP: This form will automatically populate information from your Coupa supplier profile. You can review and update the fields as needed to ensure accuracy.'

New to Coupa | Supplier Information Management - Invitation

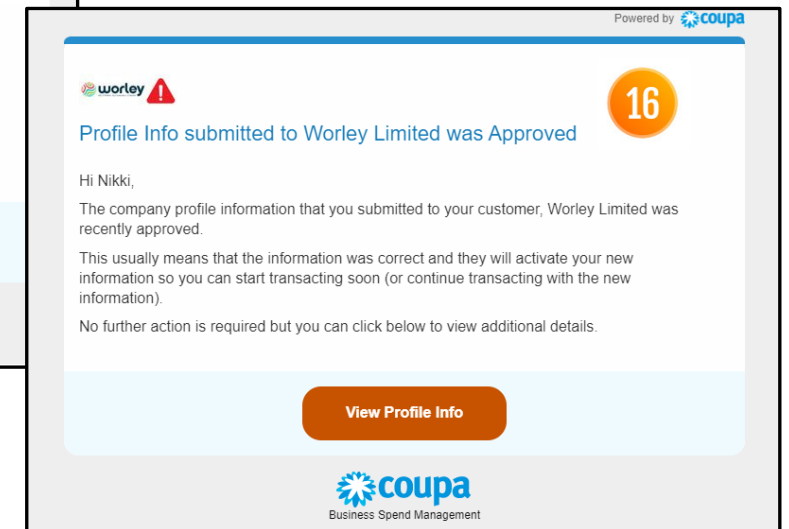
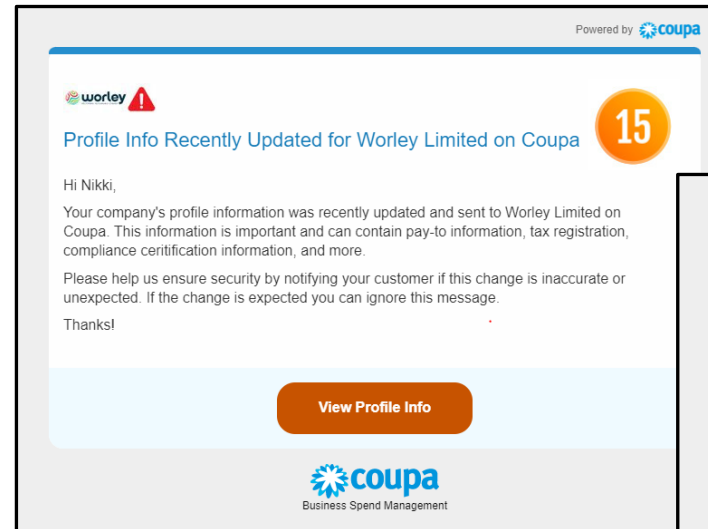
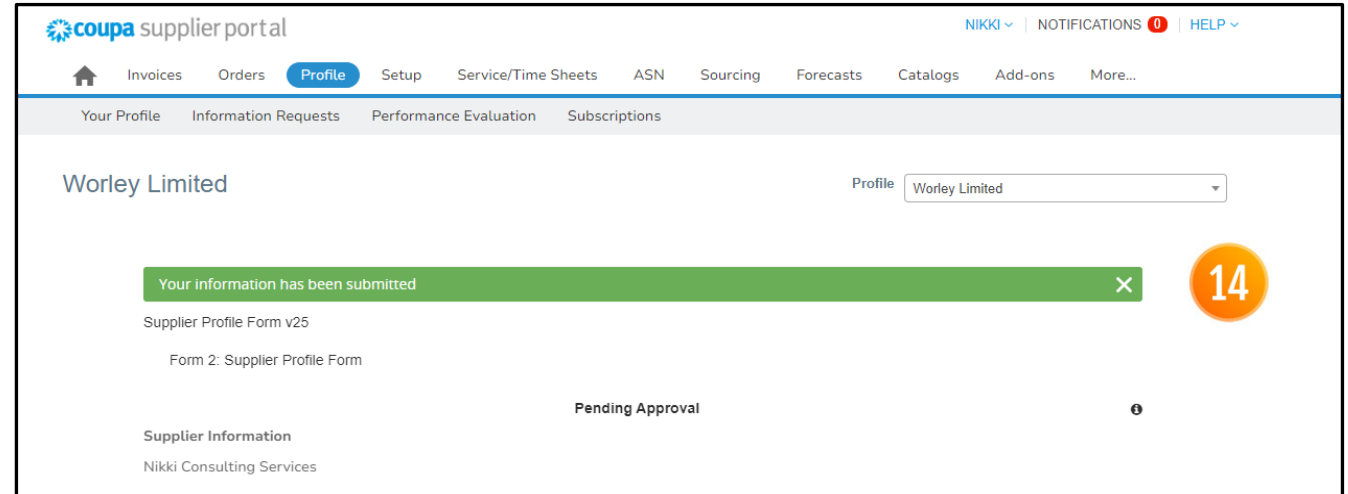
- 12. Once you have completed the form, select the **Submit for Approval** button.
- 13. **If you have any missing required fields, you will receive a red error bar. The missing or incorrect fields will also turn red, giving you direction on where/ what information is missing or needs to be addressed.

The screenshot shows the Coupa supplier portal interface. The top navigation bar includes 'coupa supplier portal', user 'JOE', 'NOTIFICATIONS' with a red indicator, and a 'HELP' link. The main navigation menu has tabs for 'Invoices', 'Orders', 'Profile' (selected), 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below this is a sub-menu with 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area displays 'Worley Limited' with a 'Profile' dropdown menu. A yellow message box with a green checkmark says 'We have auto-filled some information from your Public Profile.' At the bottom, there are three buttons: 'Decline', 'Save', and 'Submit for Approval'. A yellow circle with the number '12' is overlaid on the 'Submit for Approval' button.

The screenshot shows the Coupa Supplier Profile Form for 'Nikki Consulting Services'. At the top, a red error bar says 'Please fix the errors below'. The form is divided into two main sections: 'Supplier Information' and 'Tax Registrations'. The 'Supplier Information' section has a 'Company Name' field filled with 'Nikki Consulting Services' and a 'Company Trading Name' field which is empty. Below the 'Company Trading Name' field, it says 'Populate if different from Company Name'. The 'Tax Registrations' section has a red error bar and an 'Add Tax Registration' button. A yellow circle with the number '13' is overlaid on the form.

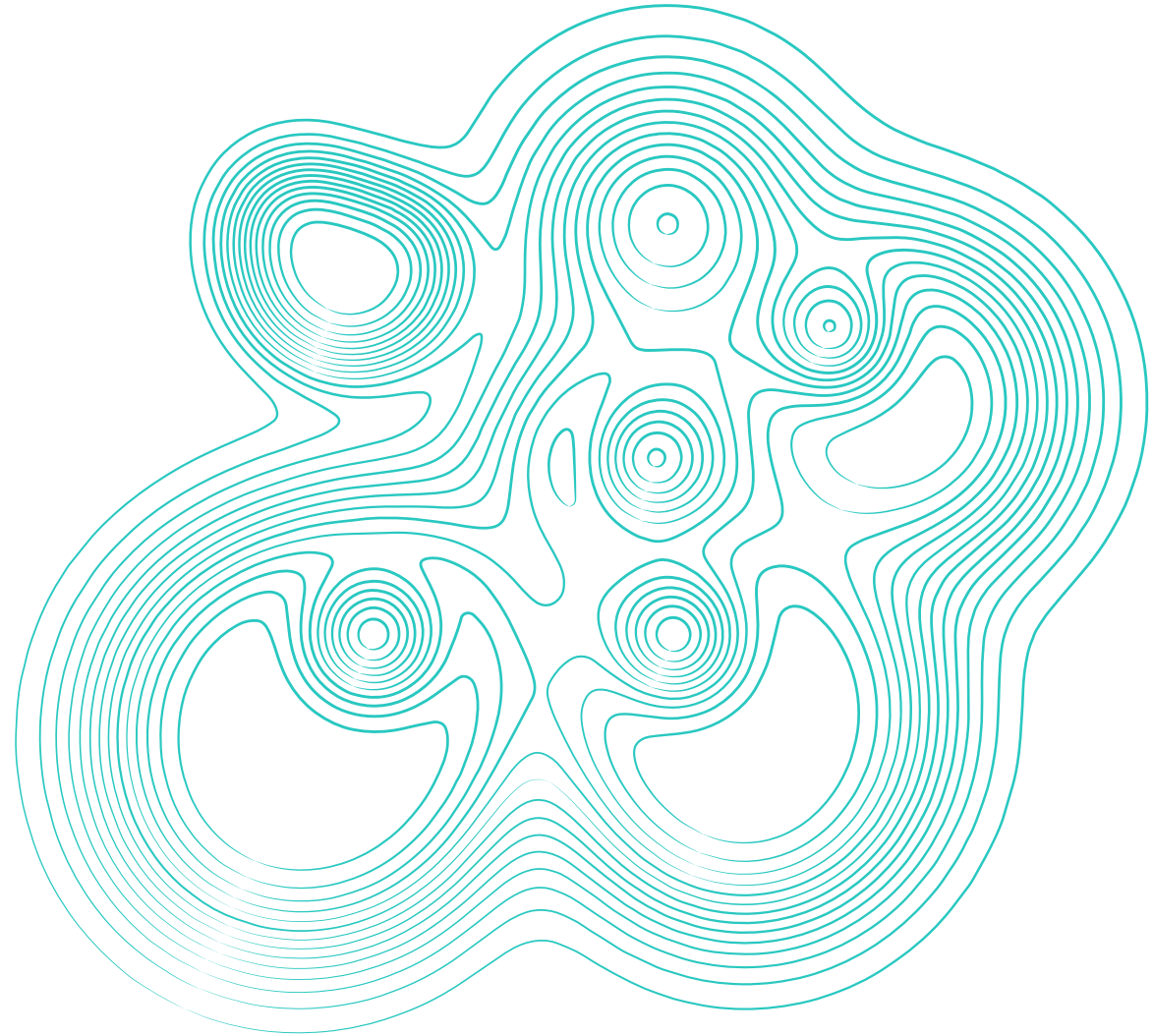
New to Coupa | Supplier Information Management - Invitation

14. After you select 'Submit for approval', a green bar will appear, indicating that your form has been successfully submitted to Worley for review.
15. Upon submission, you will also receive an email confirmation that your supplier information has been successfully submitted for review.
16. Once Worley has completed its internal approval, you will receive an email notification confirming that your information has been accepted for review.



COUPA SUPPLIER INFORMATION MANAGEMENT

3. SIM Field Details



Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' and links for Invoices, Orders, Business Profile (selected), and Service Sheets. Below this is a sub-navigation bar with Business Profile, Profile Submissions, Legal Entities, and Payments. The main content area is titled 'Worley Limited - SAMPLE SUPPLIER'. It includes a 'View All Responses' link, a 'Supplier Profile Form_v7' section with a 'Form 2: Supplier Profile Form' link, a 'Supplier Information' section showing 'SAMPLE SUPPLIER', and a 'Supplier Profile Form' section. Below that is a 'Supplier Onboarding Guide' section with a link to 'Supplier_Onboarding_Guide.docx'. The form fields shown are: '* Supplier Location' with a dropdown menu showing 'Select', and '* Company Name' with a text input field containing 'Nikki Consulting Services'. A note at the bottom says 'Enter the supplier name in ALL CAPITAL LETTERS'.

Fields – Supplier Profile Form

- **Supplier Location***
- **Company Name* Please type in ALL CAPS**
- Company Trading Name
- **Tax Registration***
 - **Country***
 - **VAT ID***
- **Company Identification Number***
- **Permanent Account Number (PAN) – India only (C)**
- **RUT Number (RUT) – Chile Only (C)**
- **RUC Number (RUC) – Peru Only (C)**
- **Date Established***
- **Proof of Company Registration* (A)**
- DUNS Number
- **Primary Address (Region/Address)***
- **SIM – Primary Contact (Name/Contact Information)***
- Additional Contacts (if you choose to add, the following fields are required)
- Website
- Parent Company Legal Name
- **Preferred Communication Language***

What is your company's legal structure or Organization type?*

Company Registration Type*

Shareholder Details (A)

- Download "Shareholder Details" spreadsheet, Fill Out and Upload back

Other Registration Type

Company Type*

Default Commodity*

How much is your annual or budgeted spend (USD)?*

What are your other Business Activities?*

Company Brochure (A)

Licenses and Permits (A)

Sectors* (where capable of providing services, goods and materials, products or works)

Countries where products/services provided*

Countries, where regulated by a government agency* (Select the countries where your company is regulated by a government agency (if none select N/A))

* **Mandatory Field**

(A) = **Attachment Field**

(C) = **Conditional Field**

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' and tabs for 'Invoices', 'Orders', 'Business Profile' (selected), and 'Service Sheets'. Below this, there's a sub-navigation bar with 'Business Profile', 'Profile Submissions', 'Legal Entities', and 'Payment'. The main content area is titled 'Worley Limited - SAMPLE SUPPLIER'. It includes a 'View All Responses' link, a 'Supplier Profile Form_v7' section with a 'Form 2: Supplier Profile Form' link, a 'Supplier Information' section with 'SAMPLE SUPPLIER', and a 'Supplier Profile Form' section. Under 'Supplier Onboarding Guide', there's a link to 'Supplier_Onboarding_Guide.docx'. The form fields include: '* Supplier Location' with a dropdown menu showing 'Select'; '* Company Name' with a text input field containing 'Nikki Consulting Services'; and a note at the bottom: 'Enter the supplier name in ALL CAPITAL LETTERS'.

Fields – Supplier Profile Form

- **Countries where subject to regulatory oversight***Select the countries where your company is subject to regulatory oversight (if none select N/A)
- **Total number of employees***
- **Principal Customer & Percentage of Turnover* (A)**
- **Is your diversity type as "Native/Indigenous Owned"?* (C)**
 - **Identify Indigenous Ownership Type* (C)**
 - **Percent of Indigenous Ownership* (C)**
 - **Indigenous Community* (C)**
 - **Location and Territory of Indigenous* (C)***

Diversity

- **Are you identified as a diverse Supplier***
- **Supplier Diversity (C)***
 - Country (C)
 - Diversity Category (C)
 - Diversity Subcategory (C)
 - Agency (C)
 - Effective Date (C)
 - Expiry Date (C)
 - Diversity Ownership Attachment (C)(A)
- **Diversity Ownership Percentage**

* Mandatory Field

(A) = Attachment Field

(C) = Conditional Field

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

Banking Details

Name and address of the payments.

•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

• Is Freight Terms applicable/not applicable?

Select

• Is tax applicable/not applicable?

Select

• Is Withholding tax/ TDS (WHT/TDS) applicable?

Select

• Will the company be handling, processing, or storing data/information pertaining to Worley's: employee HR identities (e.g. passports, driving licenses, ID cards, visas, payslips, social security numbers, medical data, credit card data), or personal data of our customers and business partners?

*Coupa requires you to add your remit to, to your CSP Account, if you do not have one already set up COUPA will prompt you to add at this time.

Fields – Supplier Profile

Banking Details

- **SIM Remit to***
 - **Remit to Email***
 - **Remit to Address***
 - **Supplier Payment Location***
 - **International / Domestic Bank***
 - **Bank Information***
 - Bank Details (Name/Address)
 - Account Currency
 - **Account Start Date***
 - **Account Payee Name***
- **Bank Account Numbers***
 - **Conditional by Country (i.e., IBAN/SWIFT/BSB etc.) (C)**
- **Banking support Document* (A)**
- **Payment Currency***

Banking Details (CONT)

- **Invoice Currency***
- Tax Registration
- Payment Method
- **Is Freight Terms applicable/not applicable?***
- **Freight Terms* (C)**
- Is Withholding tax/ TDS (WHT/TDS) applicable?

* Mandatory Field (C) = Conditional Field (A) = Attachment Field

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

• Have you answered any of the previous three questions as "Yes"

Yes

No

Is the Company currently accredited or certified in respect of its information security, cybersecurity, or data privacy practices?

Select

• Does your Company have a privacy policy in place and is in compliance with applicable privacy regulations?

Yes

Please describe the review process and frequency.

• Do you or any of your owners, shareholders, directors, officers, or key employees have any relationship with Worley, its employees, or related parties?

If Yes, please input the Name, Location and Relationship details below. If No, please skip these fields.

Name

Location

Fields – Supplier Profile

- **Personally Identifiable Information (PPI) handling***
 - Will the company be handling, processing, or storing data/information pertaining to Worley's: employee HR identities (e.g. passports, driving licenses, ID cards, visas, payslips, social security numbers, medical data, credit card data), or personal data of our customers and business partners?
- **Confidential Data handling***
 - Will the company be handling, processing, or storing data/information pertaining to Worley's confidential information, including but not limited to: sales, finance, project delivery activity; specific business initiatives, bidding strategies, audit findings, security logs, network diagrams and configurations; merger & acquisition plans; litigation cases; passwords and PIN codes, VPN tokens, or encryption keys?
- **Network Access***
 - Will the company's products/services require an IT connection to Worley's network/information systems?
- **Have you answered any of the previous three questions as "Yes"* (C)**
 - Is the Company currently accredited or certified in respect of its information security, cybersecurity, or data privacy practices? (C)
 - Is Company accredited with ISO/IEC 27001*
 - ISO/IEC 27001 Certificate (A)
 - Is Company accredited with ISO/IEC 27701*
 - ISO/IEC 27701 Certificate (A)
 - Is Company accredited with SOC1 Type II*
 - SOC1 Type II Certificate (A)
 - Is Company accredited with SOC2 Type II*
 - SOC2 Type II Certificate (A)
 - Is Company accredited with Cybervadis?*
 - Cybervadis Scorecard (A)
 - Are AI systems used in the course of providing products/services to Worley?*

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

Non-disclosure and confidentiality agreement	No
Please review the Non-disclosure and confidentiality agreement here - Non-Disclosure and Confidentiality Agreement Check the box if you acknowledge Non-disclosure and confidentiality agreement.	
Worley Code of Conduct	No
Please review the Worley of Conduct here - Worley Code of Conduct Check the box if you acknowledge Worley Code of Conduct	
Supply Chain Code of Conduct	No
Please review the Supply Chain Code of Conduct here - Supply Chain Code of Conduct Check the box if you acknowledge Supply Chain Code of Conduct	
CIS Status	
This is required for UK based Suppliers	
Unique Tax Reference	
This is required for UK based Suppliers	
NI/Company registration	
This is required for UK based Suppliers	
CIS name	
This is required for UK based Suppliers	

Fields – Supplier Profile

- Do you or any of your owners, shareholders, directors, officers, or key employees have any relationship with Worley, its employees, or related parties?*
- Employee Relationship (A)
- Are you aware if any of the parent entities, shareholders, ultimate beneficial owners, subsidiaries, or key executives of the third party are sanctioned by any jurisdiction or have any connections with sanctioned entities or countries?*
- Will you interact with government officials on behalf of Worley?
- Are any of the following raw materials contained in the supplier's products*
- Does the supplier source the products or the raw materials from any of the following countries: North Korea, Eritrea, Mauritania, Saudi Arabia, Türkiye, Tajikistan, United Arab Emirates, Russia, Afghanistan, and Kuwait? *
- If Yes, please explain (C)
- Does the supplier require use of any low skilled or migrant labor?*
- If the answer to the previous question (relating to low skilled or migrant labor) is yes, does the supplier rely on outsourcing through recruitment or labor hire agencies? If no, please select, not applicable.* (C)
- If the answer to either of the previous questions (relating to low skilled or migrant labor, and outsourcing) is 'Yes', please include the country from which the third party would be sourcing these workers (C)

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

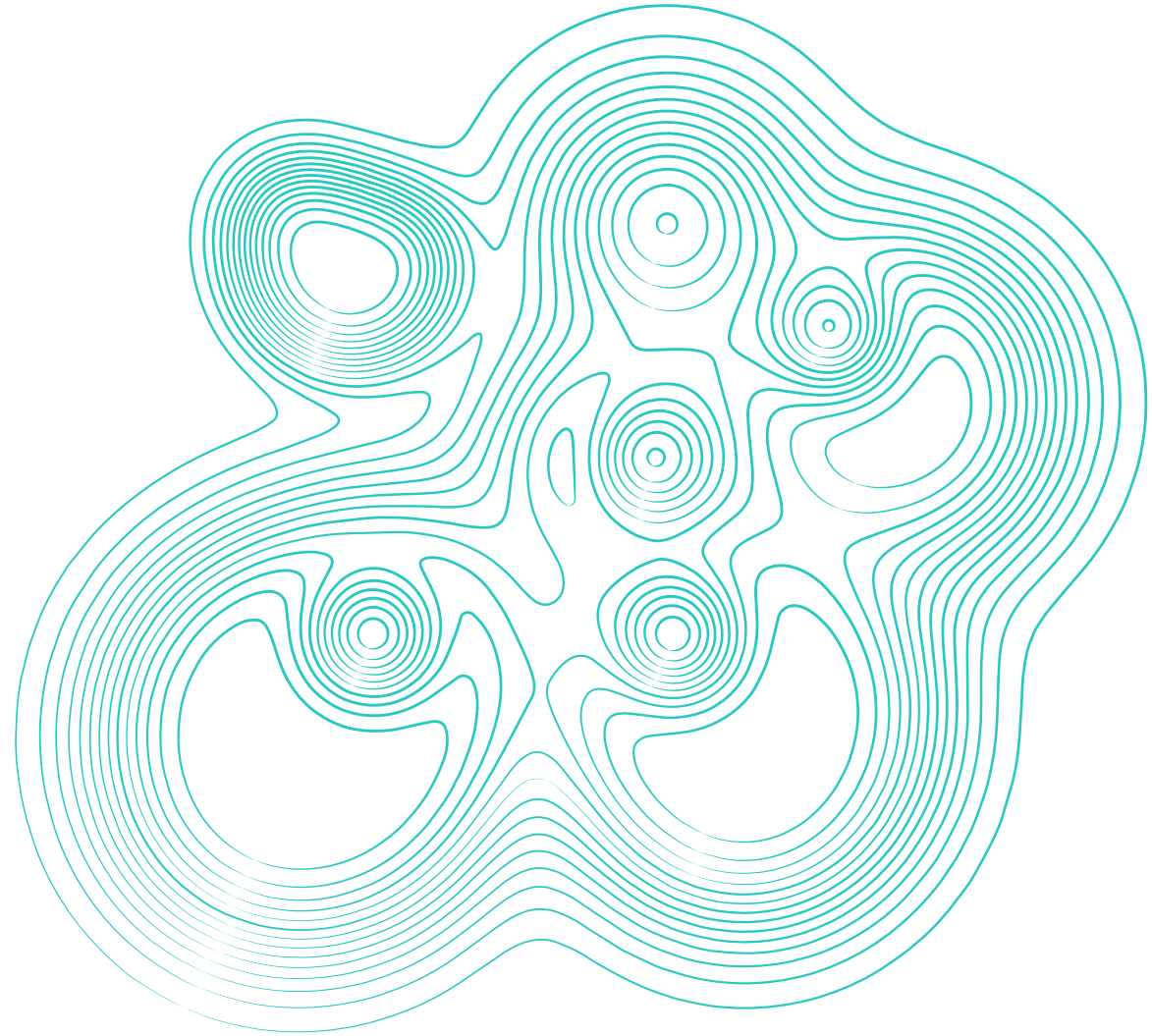
Non-disclosure and confidentiality agreement	No
Please review the Non-disclosure and confidentiality agreement here - Non-Disclosure and Confidentiality Agreement Check the box if you acknowledge Non-disclosure and confidentiality agreement.	
Worley Code of Conduct	No
Please review the Worley of Conduct here - Worley Code of Conduct Check the box if you acknowledge Worley Code of Conduct	
Supply Chain Code of Conduct	No
Please review the Supply Chain Code of Conduct here - Supply Chain Code of Conduct Check the box if you acknowledge Supply Chain Code of Conduct	
CIS Status	
This is required for UK based Suppliers	
Unique Tax Reference	
This is required for UK based Suppliers	
NI/Company registration	
This is required for UK based Suppliers	
CIS name	
This is required for UK based Suppliers	

Fields – Supplier Profile

- Will the landlord be engaging any cleaning, maintenance, security and/ or other support staff?*
 - Does the third party have an established process to conduct due diligence on its sub-contractors/suppliers to identify bribery, corruption and modern slavery red flags?*
 - If the answer to the previous question (relating to due diligence) is not applicable, please explain. (C)
 - Does the third party have a written policy addressing bribery, corruption, and other unethical business practices related risks?*
 - Does the third party have a written policy addressing modern slavery and human rights related risks?*
 - My company has a privacy policy in place and complies with applicable privacy regulations.
-
- Non-disclosure and confidentiality agreement – *check box if you agree*
 - Worley Code of Conduct - *check box if you agree*
 - Supply Chain Code of Conduct - *check box if you agree*
 - If you do not acknowledge any of the fields above, please provide your company's policies. (A)
 - The following fields are available if the supplier selects United Kingdom on the supplier location (CIS Status, Unique Tax Reference, NI/Company registration and CIS Name)
 - Does this form correspond to an update?*
- Note: If you are completing this form for the first time, please select “No”. If you are updating an existing profile, select “yes”
- Which of the following areas require an update? (C)

COUPA RISK ASSESS (CRA)

1.Evaluation Invitations



New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

1. Based on the type of work your company will be performing for Worley, you may receive the following email from Coupa. This is an invitation to you to create a Coupa Risk Assess (CRA) account, this to complete supplier evaluations to be added to the Approved Supplier List.
2. After your initial email you will receive an authentication code, which is required for you to start the process.

1

A Coupa Risk Assess account has been created for you

Dear **Nikki Test Supplier**,

A Coupa Risk Assess account has been created for you.

Your Username is: **worley.cra.uat+nikki@gmail.com**

Please use the link below and the authentication code provided in a separate email with the subject "Your Coupa Risk Assess authentication code" to login to Coupa Risk Assess.

https://worleyonesource-test.risk.coupa.com/External/_si7314?xS=bjX0Q4AV69TBIWSJOMfUrGe%2FyKaSsfRLwOIJRheXbLLFYz1r%2FZC4zxUz7LFnGovjHpBm2pHUyraiNVRXOF6VzsLqFwqHt9BL0AEm6mFtnjODRe1BvIjWSQeky5g%2B0tiQyKIWsVakb5CBRS%2FhQZS%2F%2BR0pSLvCM3u53MPw4%2Fvrt%2FhNS8ua1Q7u4mUpYEp4nmSGNVXBFqMa4%3D

If you have any questions please contact your administrator at mario.faria@worley.com.

Thank you for using Coupa Risk Assess!
The Coupa Risk Assess Team

This email was intended for Nikki Test Supplier

Coupa Risk Assess - Disclaimer
This communication and any files or attachments transmitted with it may contain information that is confidential, privileged, and exempt from disclosure under applicable law. It is intended solely for the use of the individual or entity to which it is addressed. If you are not the intended recipient, you are hereby notified that any use, dissemination, or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us here so that we may take the appropriate action.

2

Your Coupa Risk Assess authentication code

Dear **Nikki Test Supplier**,

Enclosed is the authentication code needed to login to the Coupa Risk Assess system.

Your authentication code is: 18D01A73s4S2b

A link to login was sent to you in a separate email. Please refer to that email for instructions on using your authentication code to login to your Coupa Risk Assess account.

If you have any questions please contact your administrator at mario.faria@worley.com.

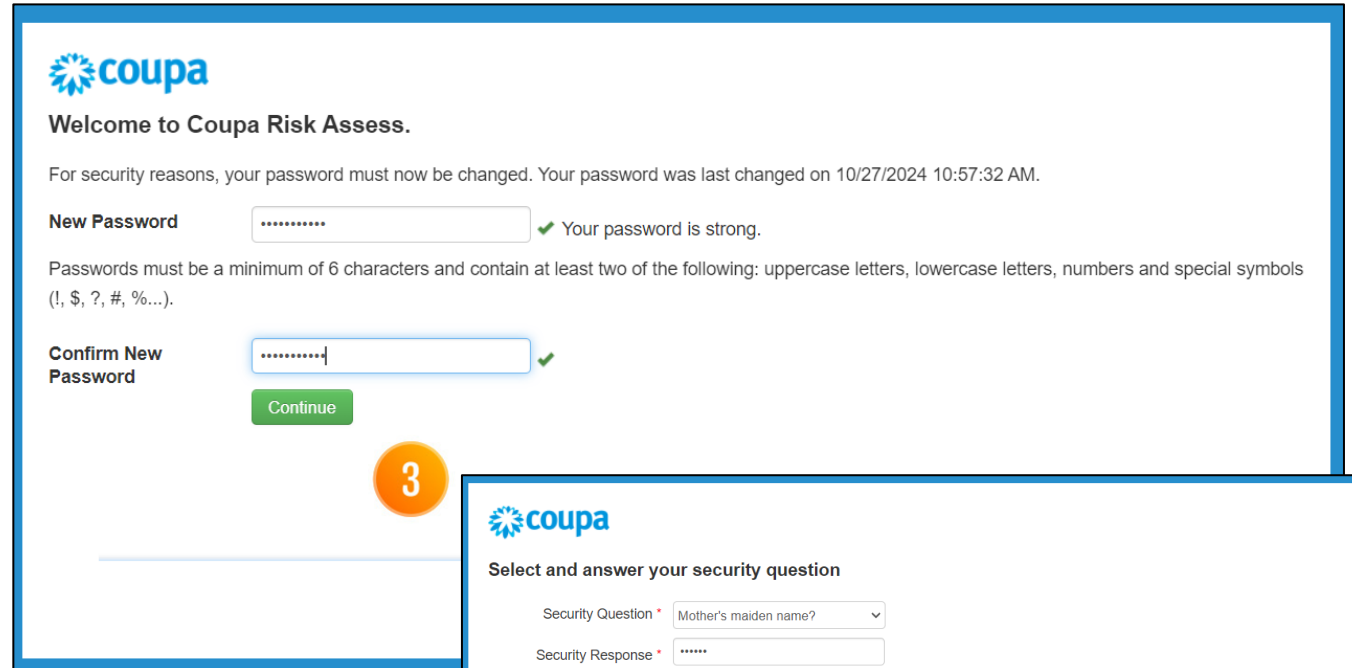
Thank you for using Coupa Risk Assess!
The Coupa Risk Assess Team

This email was intended for Nikki Test Supplier .

Coupa Risk Assess - Disclaimer
This communication and any files or attachments transmitted with it may contain information that is confidential, privileged, and exempt from disclosure under applicable law. It is intended solely for the use of the individual or entity to which it is addressed. If you are not the intended recipient, you are hereby notified that any use, dissemination, or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us here so that we may take the appropriate action.

New to Coupa | Coupa Risk Assess (CRA)-Evaluation Invitations

3. CRA will first ask you to create a Security Question and answer (for identification purposes if needed) and a password.
4. After confirming your password, you will be taken to a terms of use page, to agree to the terms of use for your new CRA Account.



coupa

Welcome to Coupa Risk Assess.

For security reasons, your password must now be changed. Your password was last changed on 10/27/2024 10:57:32 AM.

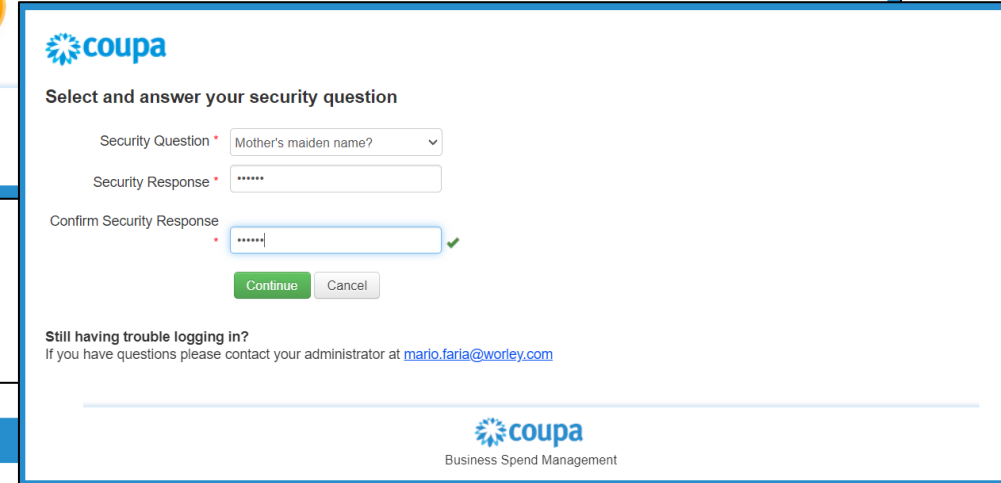
New Password ✓ Your password is strong.

Passwords must be a minimum of 6 characters and contain at least two of the following: uppercase letters, lowercase letters, numbers and special symbols (!, \$, %, #, &...).

Confirm New Password ✓

Continue

3



coupa

Select and answer your security question

Security Question *

Security Response *

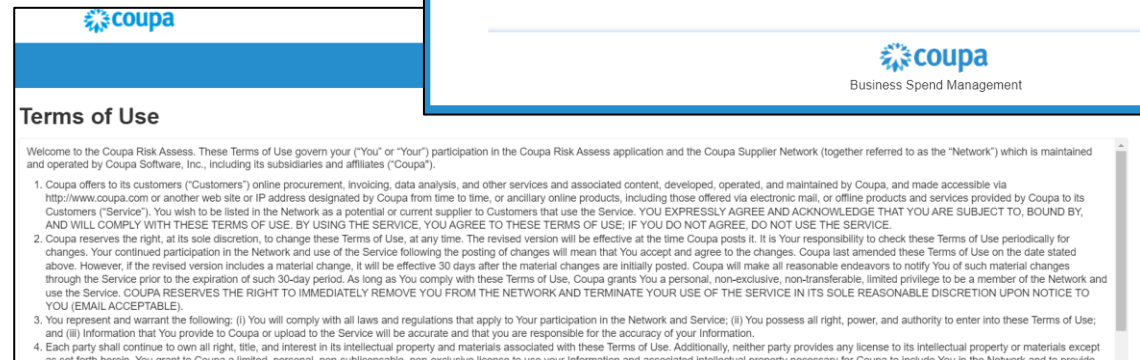
Confirm Security Response * ✓

Continue **Cancel**

Still having trouble logging in?
If you have questions please contact your administrator at mario.faria@worley.com

coupa
Business Spend Management

4



coupa

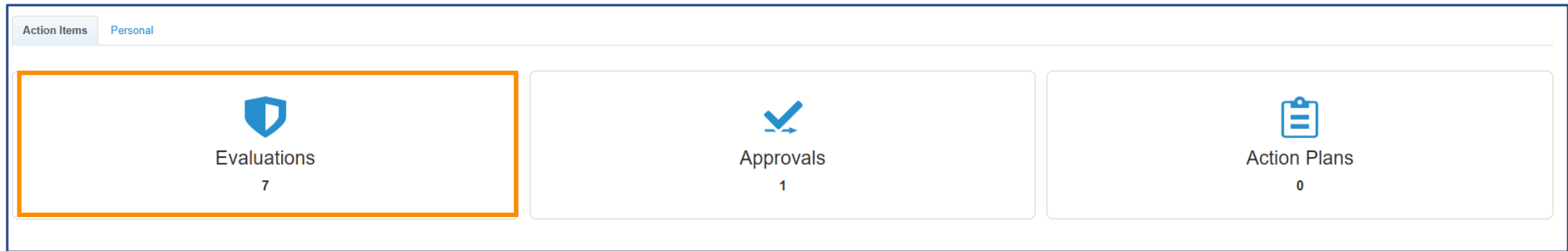
Terms of Use

Welcome to the Coupa Risk Assess. These Terms of Use govern your ("You" or "Your") participation in the Coupa Risk Assess application and the Coupa Supplier Network (together referred to as the "Network") which is maintained and operated by Coupa Software, Inc., including its subsidiaries and affiliates ("Coupa").

1. Coupa offers to its customers ("Customers") online procurement, invoicing, data analysis, and other services and associated content, developed, operated, and maintained by Coupa, and made accessible via <http://www.coupa.com> or another web site or IP address designated by Coupa from time to time, or ancillary online products, including those offered via electronic mail, or offline products and services provided by Coupa to its Customers ("Service"). You wish to be listed in the Network as a potential or current supplier to Customers that use the Service. YOU EXPRESSLY AGREE AND ACKNOWLEDGE THAT YOU ARE SUBJECT TO, BOUND BY, AND WILL COMPLY WITH THESE TERMS OF USE. BY USING THE SERVICE, YOU AGREE TO THESE TERMS OF USE; IF YOU DO NOT AGREE, DO NOT USE THE SERVICE.
2. Coupa reserves the right, at its sole discretion, to change these Terms of Use, at any time. The revised version will be effective at the time Coupa posts it. It is Your responsibility to check these Terms of Use periodically for changes. Your continued participation in the Network and use of the Service following the posting of changes will mean that You accept and agree to the changes. Coupa last amended these Terms of Use on the date stated above. However, if the revised version includes a material change, it will be effective 30 days after the material changes are initially posted. Coupa will make all reasonable endeavors to notify You of such material changes through the Service prior to the expiration of such 30-day period. As long as You comply with these Terms of Use, Coupa grants You a personal, non-exclusive, non-transferable, limited privilege to be a member of the Network and use the Service. COUPA RESERVES THE RIGHT TO IMMEDIATELY REMOVE YOU FROM THE NETWORK AND TERMINATE YOUR USE OF THE SERVICE IN ITS SOLE REASONABLE DISCRETION UPON NOTICE TO YOU (EMAIL ACCEPTABLE).
3. You represent and warrant the following: (i) You will comply with all laws and regulations that apply to Your participation in the Network and Service; (ii) You possess all right, power, and authority to enter into these Terms of Use; and (iii) Information that You provide to Coupa or upload to the Service will be accurate and that you are responsible for the accuracy of your information.
4. Each party shall continue to own all right, title, and interest in its intellectual property and materials associated with these Terms of Use. Additionally, neither party provides any license to its intellectual property or materials except as set forth herein. You grant to Coupa a limited, personal, non-sublicensable, non-exclusive license to use your information and associated intellectual property necessary for Coupa to include You in the Network and to provide

New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

5. Once logged in, you will see the dashboard and can select the evaluation square.



New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

6. When ready to begin, click 'View' (tip: you can start now and save your progress to return later).

Action ItemsPersonal

7
Late

0
Due This Week

0
Due Later

✓

Approvals
1

📋

Action Plans
0

AllLateDue This WeekDue LaterClosed

Search

🔍

🏠

Name	Periodicity	Start Date	Context	Status	Due Date	Action
Financial Viability Control	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Rejected	11/06/2024	<div>✎</div>
Operational Delivery Capabilities	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/06/2024	<div>✎</div>
Information Security Policy Control V2	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/06/2024	<div>✎</div>

6

New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

7. Once you have started the evaluations:

- Questions marked with an asterisk * are required.
- Some answers will trigger conditional questions to appear as needed.
- There are some questions that have areas to load attachments (some are required).
 - To remove if needed, select the trash can (if applicable).

28.020 Do you hold insurance certificates that protect against risk of compensation claims and legal action to the Public (due to 'fault in product that is designed, manufactured or supplied')? 0

Please select: *

☐ Yes

☒ No

28.021 If NO, then please state reasons 0


Please input: *

Please provide a copy of the Insurance certificates *

Upload File


First select the file you want to upload!

Select files... Done

 attachment_19274640.png 23.90 KB 100%

Next, give your file an optional friendly display name. Click Submit when you are done.

Please provide a copy of the Insurance certificates *

attachment_19274640.png [attachment_19274640.png] 

New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

8. After completing, click **SAVE & SUBMIT**
9. For each evaluation submission you will be required to accept to confirm all information entered is valid.
10. The CRA will validate – please be patient. Leaving this validation page too soon may cause errors.
11. If you have missed any important information – CRA will highlight what was missed and you will need to complete before you try resubmission. It notes the item# that is missing information to make it easy to find (each # is also a link and will take you to the question requiring action).

Financial Viability Control: Market Presence

Item #	Description	Score	Actions
2.000	In which regions/countries does your company operate?		0
Please input: *			
2.010	What are your key markets?		0
Please input: *			

Financial Viability Control: Payment Terms

Item #	Description	Score	Actions
3.000	Does your Company...		0
Please input: *			

Top
Delegate
Recalc
Save
Cancel
Submit

Authorization Required

I certify that all information that I have provided is valid.

[I Accept](#) [I Refuse](#)

Authorization Required

Your evaluation is being validated. Please do not leave this page until the submittal process is complete.

Evaluation is incomplete!

- The following line(s) are missing a score: 1.020
- Components require a response on line(s).

1.020 3.000,4.000,4.010,4.020,4.030,4.040,4.050,4.060,4.070,4.080,4.090,4.100,14.010,14.020,14.030,14.040,14.050,15.000,16.000,16.010,16.020,16.030,16.040,16.050,16.060,16.070,16.080,16.090,16.100,16.110,16.120,16.130,16.140,16.150,16.160,16.170,16.180,16.190,16.200,24.000,24.010,24.020,25.000,25.010,25.020,26.000,26.010,26.020,27.000,27.010,27.020,27.030,28.000,28.010,28.020,28.030,28.040,28.050,28.060,30.000,30.010,30.020,30.030

Global

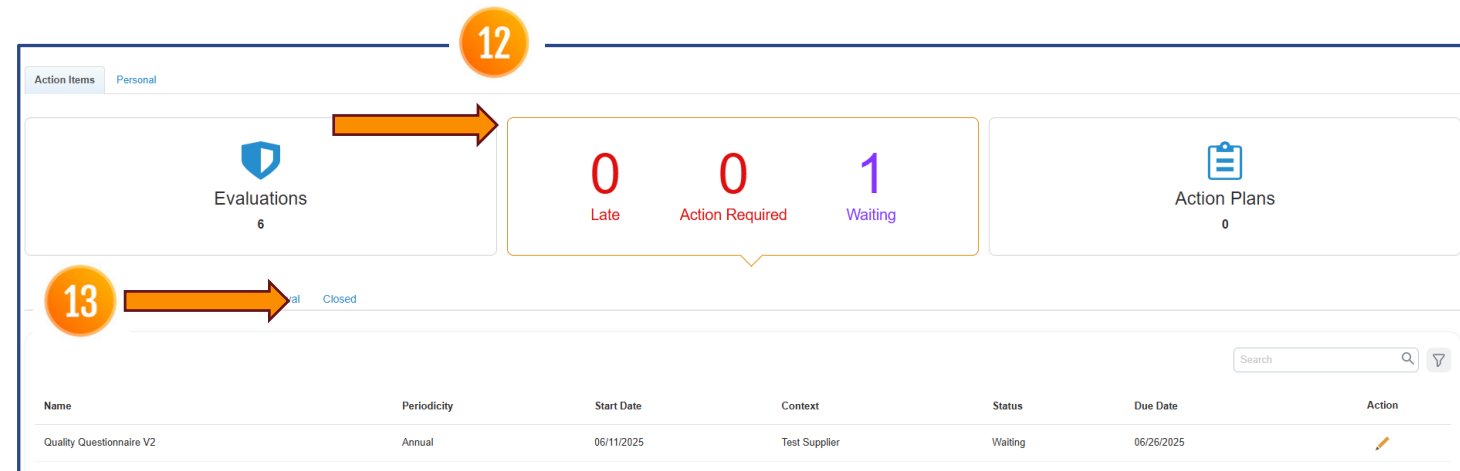
Introduction

Item #	Description	Score	Actions
0.000	Overview and Instructions		0

[Export](#) [Import](#)

New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

12. Once you have started an evaluation, if you save and exit, your evaluation will move the approval section and change to **WAITING**.
13. After successfully submitting the evaluation, it will be removed from the home page but can still be accessed under **'Closed Evaluations'**.

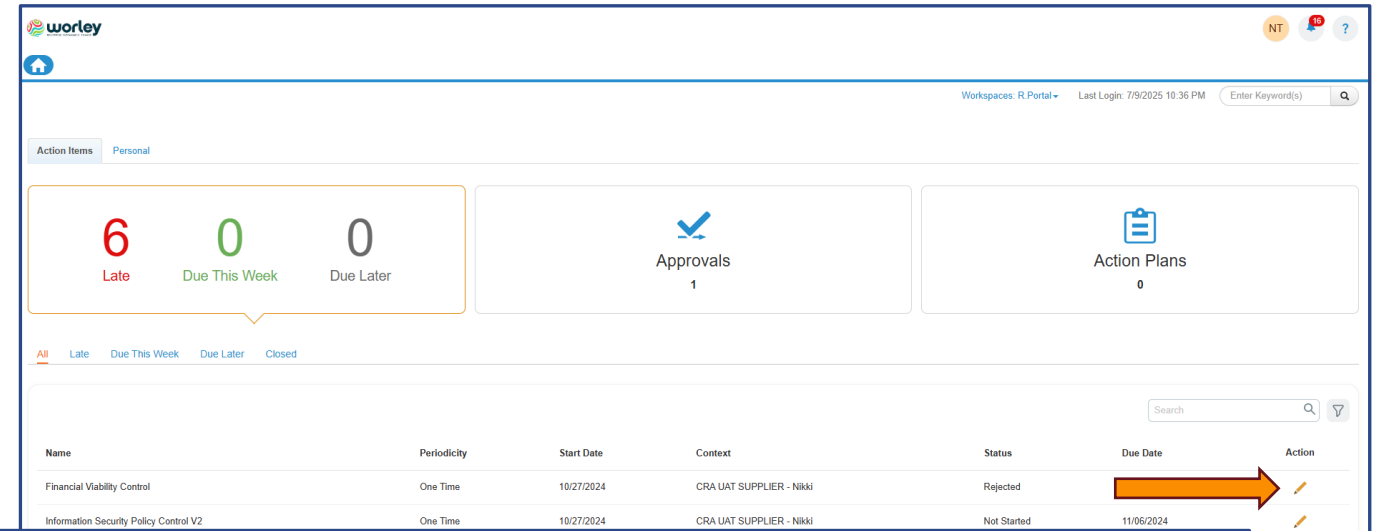


New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations



If another person in your company is responsible for completing any or all these evaluations, you can delegate them accordingly.

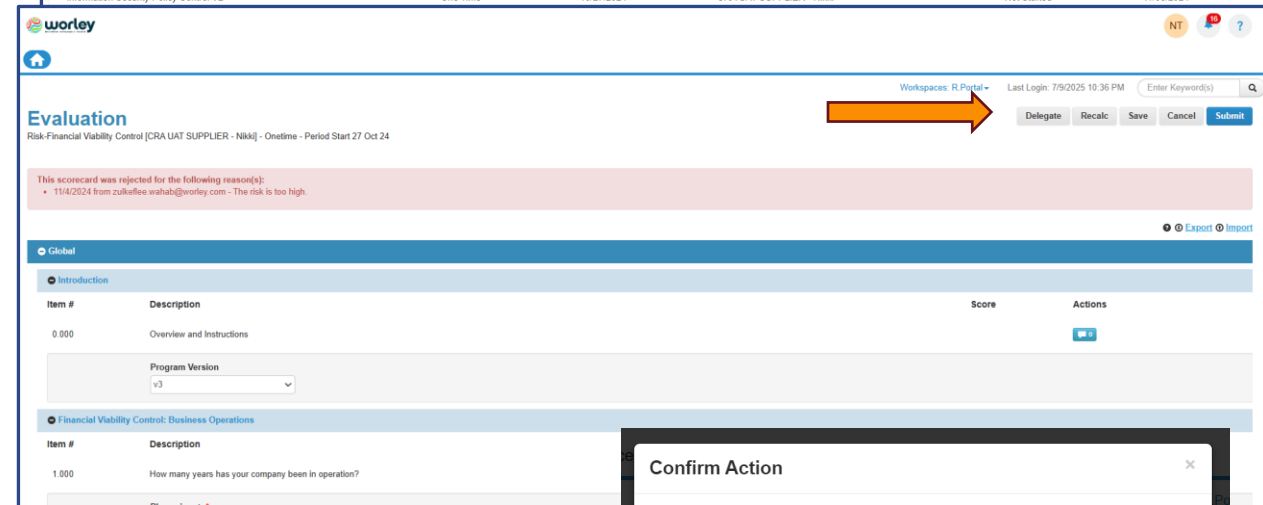
14. Select **View**

15. Once in the evaluation, select **delegate**.
You will need to confirm




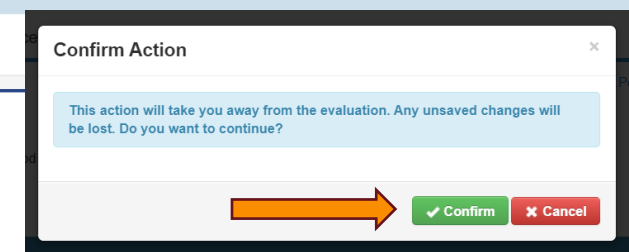
The screenshot shows the Worley CRA dashboard. At the top, there are three summary cards: '6 Late', '0 Due This Week', and '0 Due Later'. Below these are 'Approvals' (1) and 'Action Plans' (0). A table lists evaluations with columns: Name, Periodicity, Start Date, Context, Status, Due Date, and Action. An orange arrow points to the 'Action' column for the 'Financial Viability Control' row, which has a status of 'Rejected'.

Name	Periodicity	Start Date	Context	Status	Due Date	Action
Financial Viability Control	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Rejected		
Information Security Policy Control V2	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/06/2024	




The screenshot shows the 'Evaluation' page for 'Risk-Financial Viability Control [CRA UAT SUPPLIER - Nikki]'. It displays a message that the scorecard was rejected for being too high. Below this is a table of evaluation items. An orange arrow points to the 'Delegate' button in the top right corner.

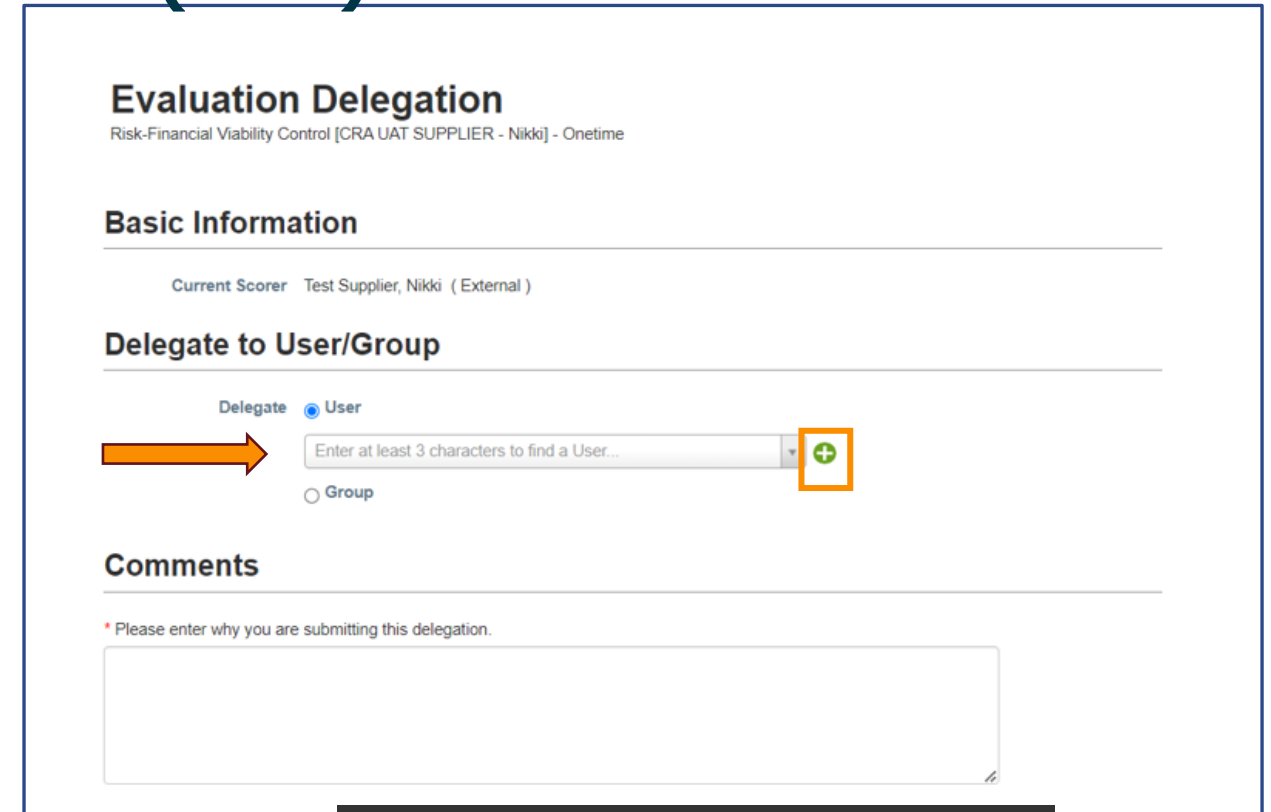
Item #	Description	Score	Actions
0.000	Overview and Instructions		
Program Version: v3			
Financial Viability Control: Business Operations			
1.000	How many years has your company been in operation?		



The 'Confirm Action' dialog box contains the text: 'This action will take you away from the evaluation. Any unsaved changes will be lost. Do you want to continue?'. At the bottom, there are two buttons: 'Confirm' (green) and 'Cancel' (red). An orange arrow points to the 'Confirm' button.

New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

16. You will be asked who you are delegating to. If this is your first time adding a delegate or if this person is a new delegate, you will have to add them to your account using the green .
17. For Adding Users, you must include their email, first and last name. They will receive an email notification and will have to follow the CRA account set up steps to access the evaluation.




Evaluation Delegation
Risk-Financial Viability Control [CRA UAT SUPPLIER - Nikki] - Onetime

Basic Information

Current Scorer Test Supplier, Nikki (External)

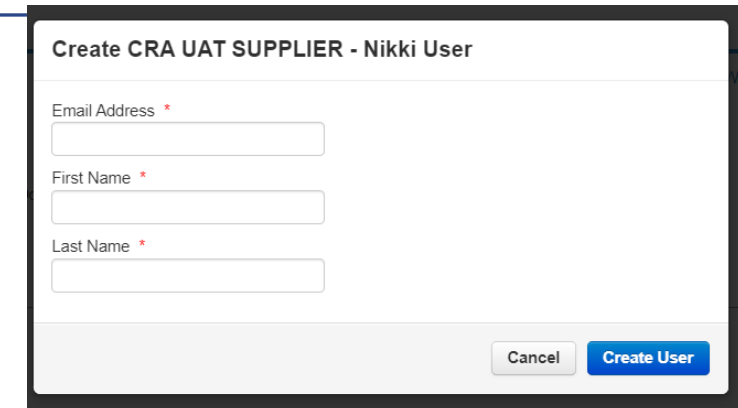
Delegate to User/Group

Delegate ☒ User ☐ Group

Enter at least 3 characters to find a User... 

Comments

* Please enter why you are submitting this delegation.



Create CRA UAT SUPPLIER - Nikki User

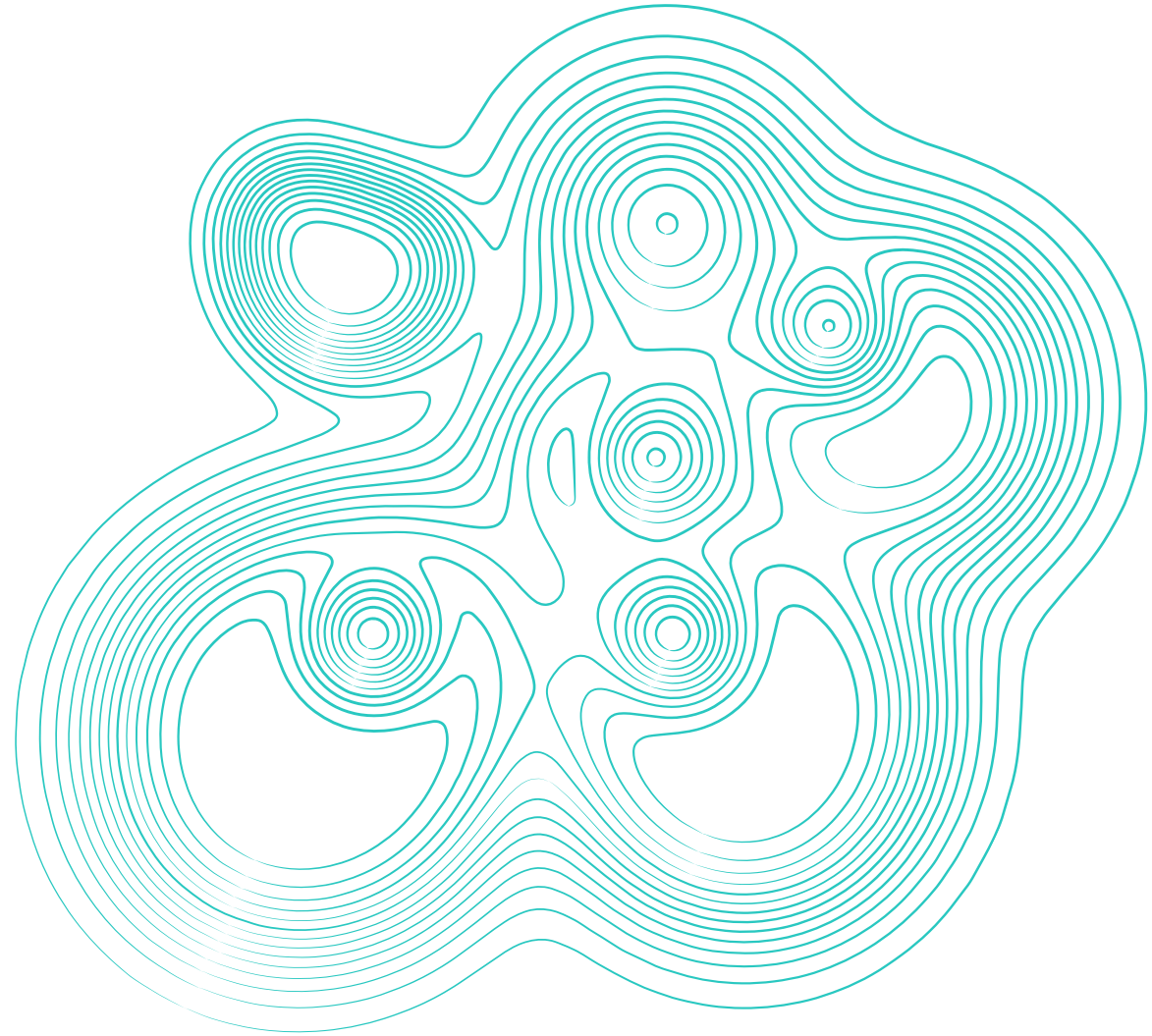
Email Address *

First Name *

Last Name *

COUPA RISK ASSESS

2. Account Management



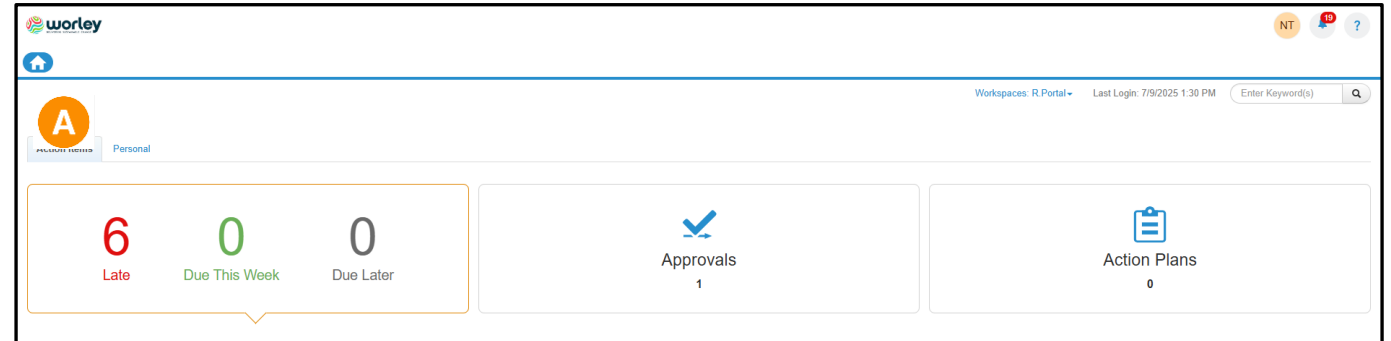
New to Coupa | Coupa Risk Assess (CRA) - Account Management

1. Home Page Management

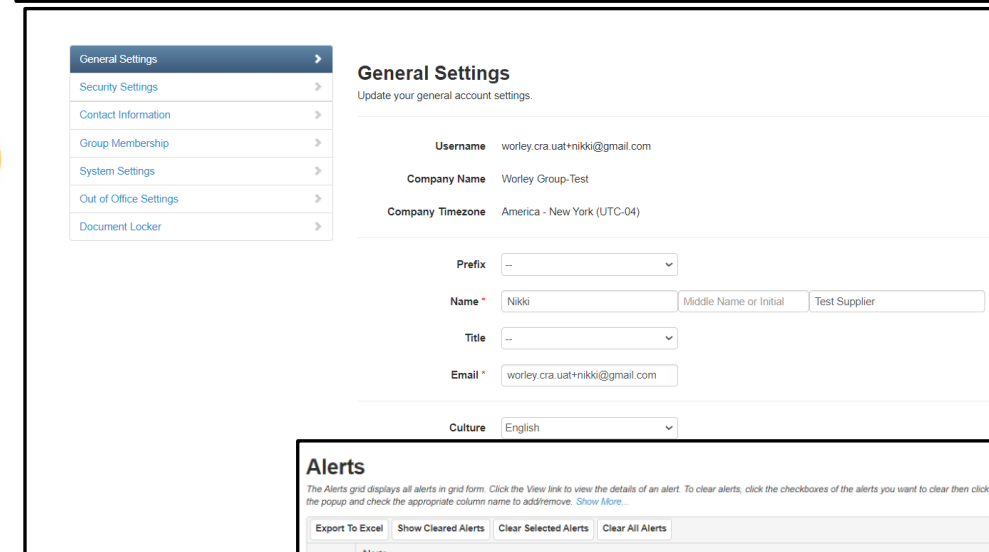
- Here is where you will find your evaluation history, and anything currently required.
- Alerts can be accessed by selecting the notification bell.
- Account Management can be accessed by clicking your initials.

2. Account Management: Once you select your initials you will be able to update and manage your account details.

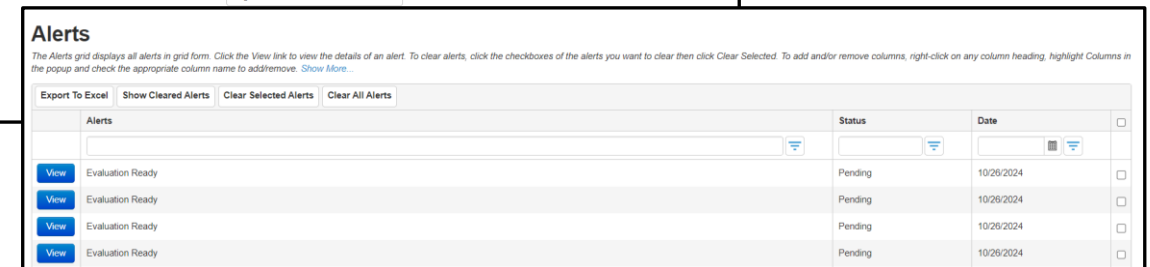
3. Alert Access: Once you click on the alert bell, you will see all alerts received.



The screenshot shows the Coupa CRA Home Page. At the top right, there are two orange circular icons labeled 'C' and 'B'. Below them, a navigation bar includes a home icon, a user profile icon with the letter 'A', and a search bar. The main content area features three large cards: 'Late' with a red '6', 'Due This Week' with a green '0', and 'Due Later' with a grey '0'. To the right of these cards are two more cards: 'Approvals' with a blue checkmark icon and the number '1', and 'Action Plans' with a blue clipboard icon and the number '0'.



The screenshot shows the 'General Settings' page. On the left is a sidebar menu with options: General Settings, Security Settings, Contact Information, Group Membership, System Settings, Out of Office Settings, and Document Locker. The main content area is titled 'General Settings' and contains fields for: Username (worley.cra.uat+nikki@gmail.com), Company Name (Worley Group-Test), Company Timezone (America - New York (UTC-04)), Prefix (a dropdown menu), Name (Nikki), Middle Name or Initial (Test Supplier), Title (a dropdown menu), Email (worley.cra.uat+nikki@gmail.com), and Culture (English).

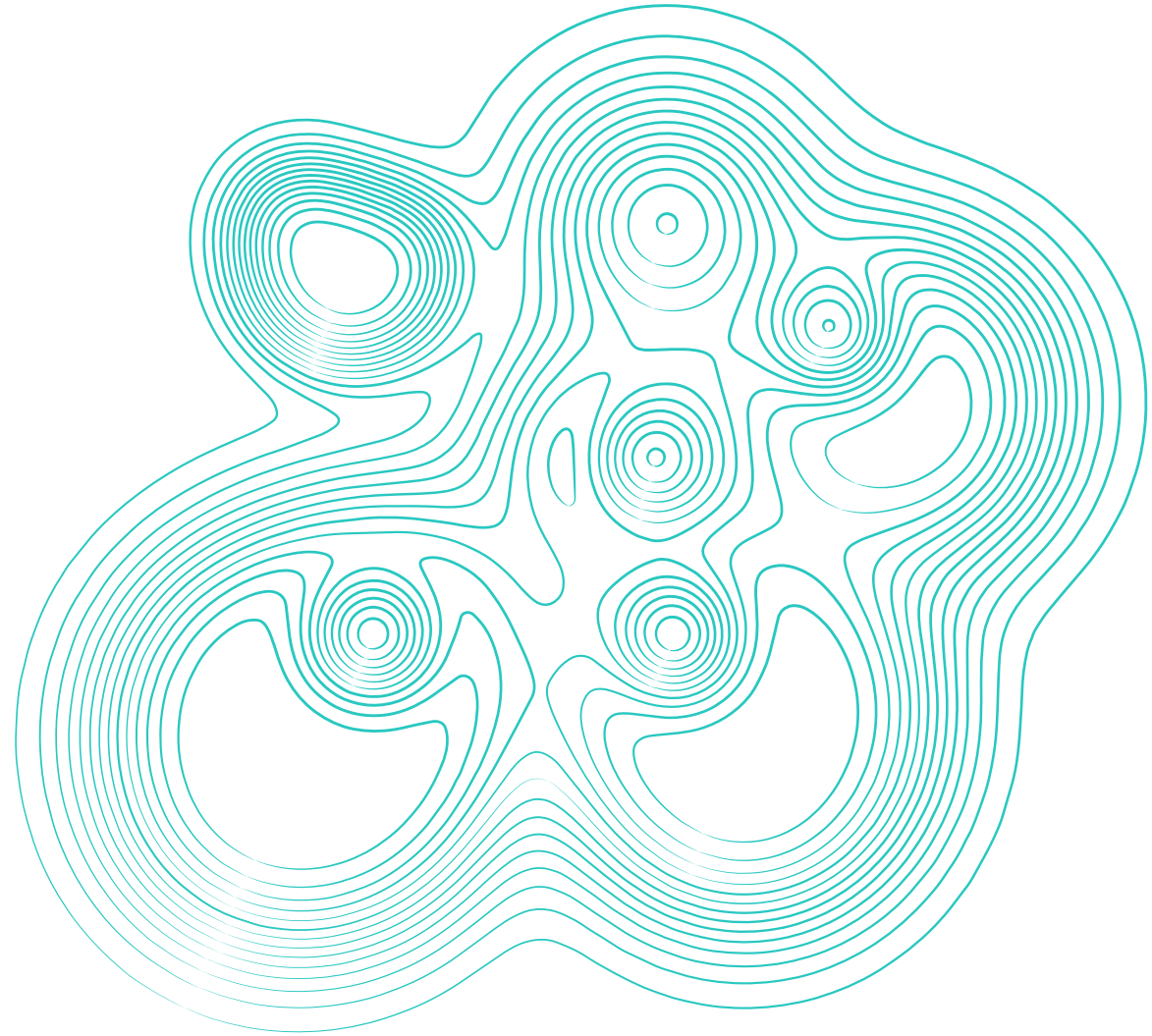


The screenshot shows the 'Alerts' page. It features a table with columns for 'Alerts', 'Status', and 'Date'. The table contains four rows of alerts, all with a status of 'Pending' and a date of '10/26/2024'. Each row has a 'View' button. Above the table are buttons for 'Export To Excel', 'Show Cleared Alerts', 'Clear Selected Alerts', and 'Clear All Alerts'.

Alerts	Status	Date
View Evaluation Ready	Pending	10/26/2024
View Evaluation Ready	Pending	10/26/2024
View Evaluation Ready	Pending	10/26/2024
View Evaluation Ready	Pending	10/26/2024

COUPA RISK ASSESS

3. Resource Material



New to Coupa | Coupa Risk Assess (CRA)- CRA Resources

- 1. On the home page, click the Resources tab to access multiple links to Coupa-created resource materials.

Relationships

Programs

Reports

Resources

NT

12

?

Workspaces: R Portal

Last Login: 10/27/2024 11:04 AM

Enter Keyword(s)

Q

Resources

Forums

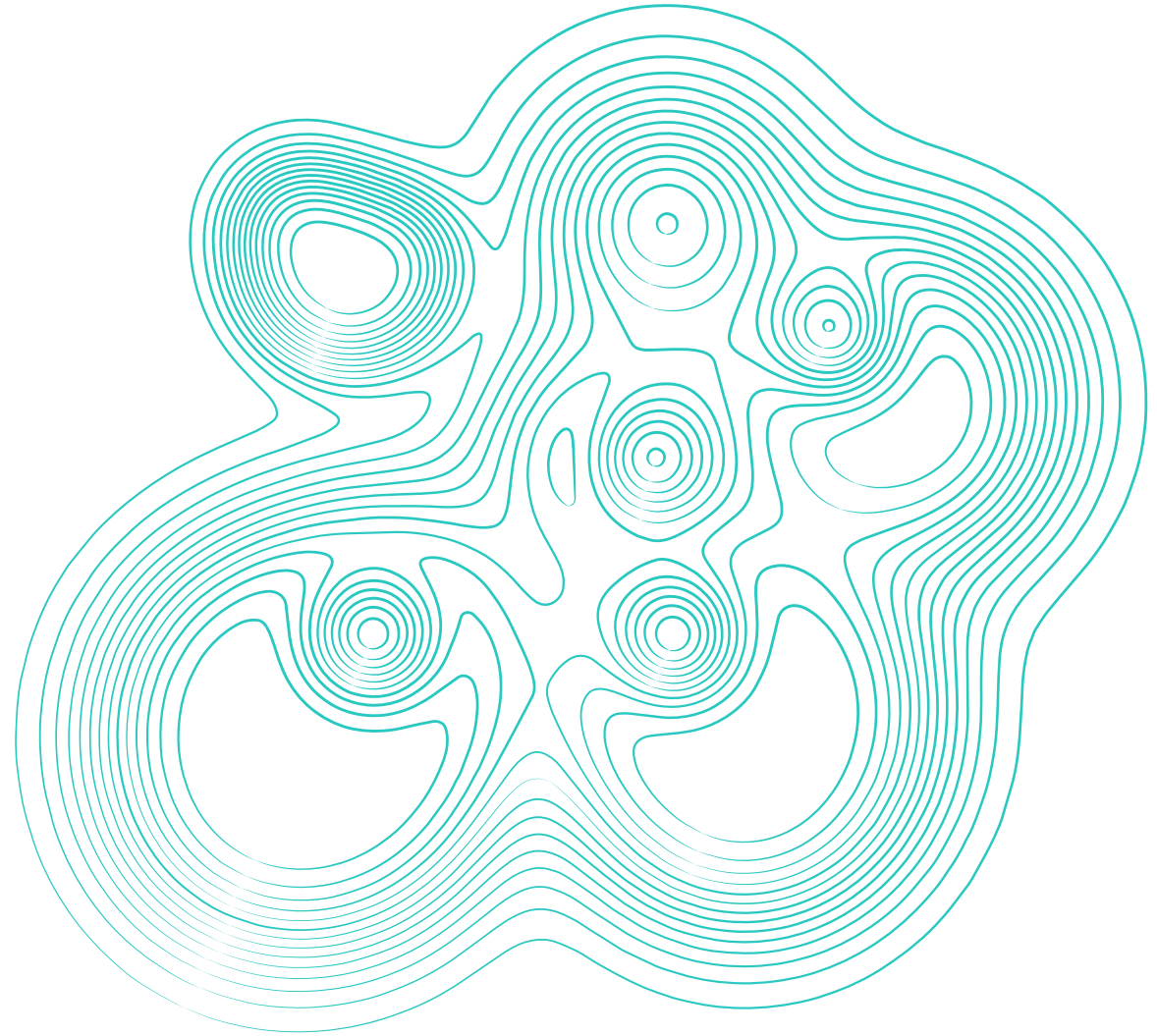
Worley Group-Test Forums

Forum Name	Most Recent Threads	Most Recent Post	Replies	Post
There are no records to display.				

Coupa Risk Assess Resources Libraries

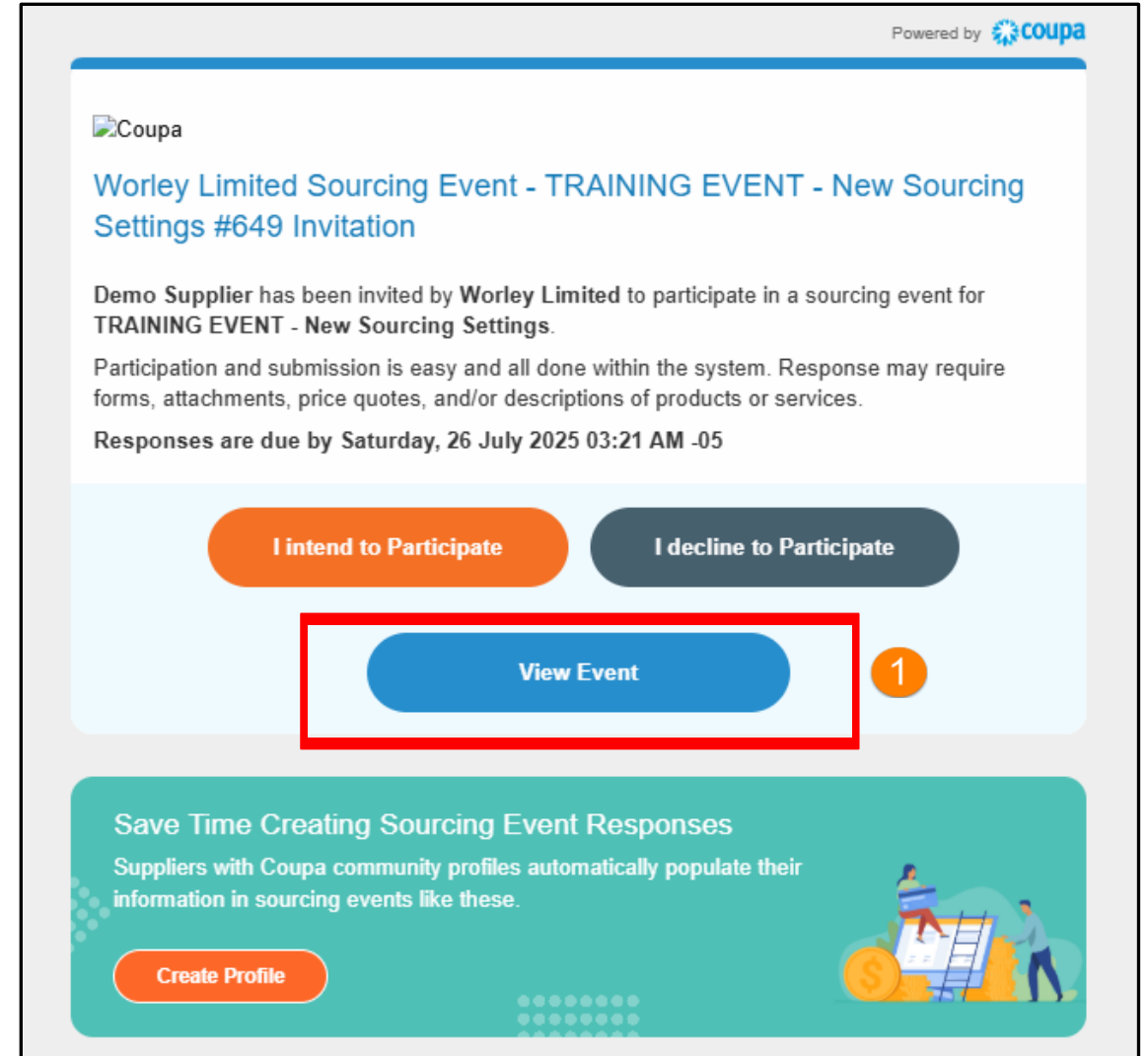
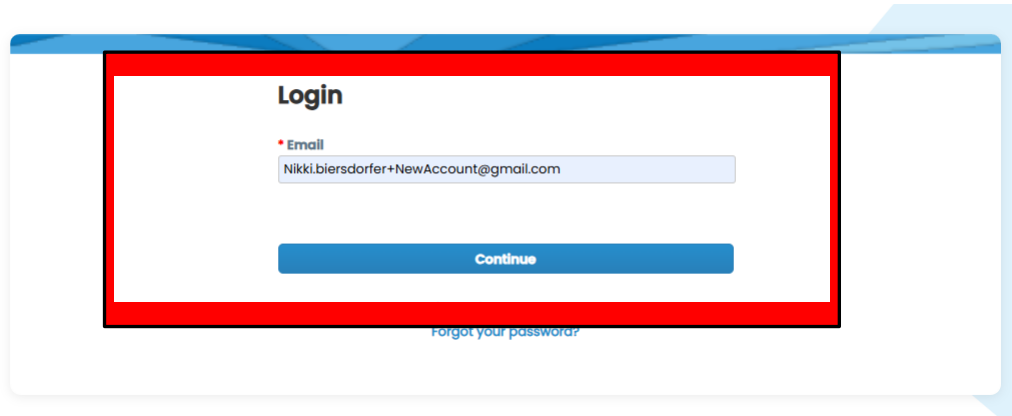
Library Name	Most Recent Document	Description
Import Templates	Test for A	
Import Templates	Tes test	Te tTest Test
Reference Guides	Risk Assess Reference Guide	The Risk Assess Reference Guide provides procedural instructions on the features and functions within the Risk Assess application. For up-to-date Risk Assess documentation, see the Success Portal .
Import Templates	User Import Template	The User Import Template can be used to import users via the Admin tab > Integration section . To import a file: 1. Click the Admin tab. The Administration page displays. 2. Scroll down to the Integration section. 3. Select the link for the data preferred to import. The Data Integration page displays. 4. Click the Browse button to locate the file for import, then double-click the file to add it, or click on the file once, then click the Open button to add it. 5. Click the Import button to ...
Reference Guides	Risk Assess TRWorld-Check One Integration Reference Guide	This document describes how Risk Assess can integrate with Refinitiv (Thomson Reuters) World-Check One, an optional data source for screening companies.


1. Responding to Sourcing Events

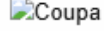


Responding to Sourcing Events

1. A supplier is invited to participate in a sourcing event through an email notification sent by Worley.
 - A. Create an account in the Coupa Supplier Portal by opening the notification email and click **here** to set up your log in credentials.
 - B. You will then be prompted to LOGIN to the Coupa Supplier Portal, this login email will default from the email your sourcing event was sent to (do not change it).



Powered by 

 **Worley Limited Sourcing Event - TRAINING EVENT - New Sourcing Settings #649 Invitation**

Demo Supplier has been invited by Worley Limited to participate in a sourcing event for TRAINING EVENT - New Sourcing Settings.

Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

Responses are due by Saturday, 26 July 2025 03:21 AM -05

[I intend to Participate](#) [I decline to Participate](#)

[View Event](#) 1

Save Time Creating Sourcing Event Responses

Suppliers with Coupa community profiles automatically populate their information in sourcing events like these.

[Create Profile](#)

Responding to Sourcing Events

2. Once logged in you will be directed to the Sourcing Tab – directly to your event.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text "coupa supplier portal", and user information: "NIKKI" with a dropdown arrow, "NOTIFICATIONS" with a red circle containing the number "7", and "HELP" with a dropdown arrow. Below the header is a navigation bar with links: Home (house icon), Invoices, Orders, Business Profile, Service Sheets, SN (highlighted with an orange arrow), Sourcing (highlighted with a blue button), Forecasts, Catalogs, Community, Setup, and More... Below this is a sub-navigation bar with "My Events" and "Public Sourcing Events". The main content area shows a specific event: "TRAINING EVENT - New S... - Event #649" with the status "Active". An orange arrow points to this event title. To the right of the event title is a blue box indicating "Event Ends 14:09" with "days" and "hrs" labels. Below the event title is a section titled "Event Info" with a description: "Supplier has been invited by Worley Limited to participate in a sourcing event for TRAINING EVENT - New Sourcing Settings. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services." Below this is a question: "Do you intend to participate in this event?" with a subtext: "Indicate your intent to participate. Buyer will be notified of your intent." and a dropdown menu labeled "Do you intend to participate?" with the option "Choose an answer". Below this is a section titled "Accept Terms and Conditions" with a subtext: "Please ensure to submit bid as per stipulated T&Cs". To the right of this is a question: "Do you accept these Terms and Conditions?" with radio button options for "Yes" and "No". At the bottom right of this section is a button labeled "Send to Event Owner". Below the "Accept Terms and Conditions" section are two links: "Event Information & Bidding Rules" and "Buyer Attachments". At the very bottom, the word "None" is visible.

coupa supplier portal

NIKKI | NOTIFICATIONS 7 | HELP

Home Invoices Orders Business Profile Service Sheets SN Sourcing Forecasts Catalogs Community Setup More...

My Events Public Sourcing Events

TRAINING EVENT - New S... - Event #649 Active

Event Ends 14:09 days hrs

Event Info

Supplier has been invited by **Worley Limited** to participate in a sourcing event for **TRAINING EVENT - New Sourcing Settings**. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

Do you intend to participate in this event?

Indicate your intent to participate. Buyer will be notified of your intent.

Do you intend to participate? Choose an answer

Accept Terms and Conditions

Terms and Conditions

Please ensure to submit bid as per stipulated T&Cs

Do you accept these Terms and Conditions?

☐ Yes

☐ No

Send to Event Owner

Event Information & Bidding Rules

Buyer Attachments

None

Responding to Sourcing Events

- 3. On the Event info tab, acknowledge the event by indicating intent to participate in the event and accept the terms and conditions.

Click **Send to Event Owner**.

Worley - Complex Packa... - Event #69

Active

Event Ends45 : 16
dayshrs

Event Info3

Supplier has been invited by Worley to participate in a sourcing event for Worley - Complex Package Template. Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPA ATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

We also direct your attention to the Instruction to Bidders. This is important, it contains information on communication during the bid period, terms and conditions, commercial document requirements and bid submission requirements.

Upon receipt of all bids a selection process will determine which bids will go through the evaluation procedure. To assist the engineering process and reduce lead times, we request you provide preliminary layout information with your bid Quotation along with early civil, piping and cabling information, where appropriate.

Regards,

Worley Procurement

3

Do you intend to participate in this event?

☒

I intend to participate in this event

Buyer will be notified of your intent to participate.

Accept Terms and Conditions

Terms and Conditions

Worley_RFP_Terms_Conditions.docx

3

Do you accept these Terms and Conditions?

☒


Yes

☐ No

Send to Event Owner

Responding to Sourcing Events


4. Scroll down to view event information & bidding rules, buyer attachments, and timeline. Click **Enter Response** to provide a response and submit a bid.

 Event Information & Bidding Rules


Event will end at the Event End Time.


Your responses are viewable by buyer once submitted

Buyer may choose to award individual line items

 Buyer Attachments

T All questions regarding this RFP shall be provided in writing via the Coupa Messaging Center. Completed RFP Submissions and Quotations will only be accepted via Coupa.


 Timeline



Jun

6

Event Start
07:28 PM America/New_York
45d : 17h : 0min



Jul

22

Event End
12:28 PM America/New_York
00:00

4

Enter Response

Responding to Sourcing Events

5. On the My Response tab, enter Response:
- a. **Attachments** – Check for provided attachments. A red asterisk next to attachment indicates a response is required.
 - b. **Forms** – Complete any forms provided. Not all sourcing events include a form.

Forms

Event Ends 45 : 16 days hrs

1. Worley - CBC

Please answer the questions below.

General

* Please confirm acceptance of the following Warranty Period: ☐ Yes ☐ No
12 months from start-up/commissioning or 18 months from delivery to jobsite, whichever occurs first.

Payment Terms

* Please confirm acceptance of the following payment terms: ☐ Yes ☐ No
Net 60 Days from Company/ Buyer Representative receipt of a correct invoice
100% upon shipment AND receipt of all Vendor Data Requirements per the attached Material Requisition

* Is your bid based on fabrication/ship from location outside of the United States? ☐ Yes ☐ No

Delivery

* Shipping Point

Import from Excel Save Submit Response

Worley - Complex Packa... - Event #69 Active

Event Ends 45 : 16 days hrs

Event Info My Response

Attachments

Provided by April Esteron	Your response
Worley NDA Instructions Please Review/Sign and upload here. Attachment <input type="text" value="Worley_NDA.pdf"/>	Response to Worley NDA Attachment * Add File
Commercial Bid Clarifications Attachment <input type="text" value="R2-00KV5-1018-RQ-P0005__Commercl..."/>	Response to Commercial Bid Clarifications Attachment Add File
CBE Evaluation Template	Response to CBE Evaluation Template

0 Import from Excel Save Submit Response

Responding to Sourcing Events

- c. **Items and Services** – Scroll to the bottom of the My Response tab, review the list of items and/or services available for bidding. Enter your bid amount in the Price per Unit field-fields marked with a red asterisk are required.
- Note:** To include additional information, expand the line item by clicking the arrow above. In the expanded view, enter additional information and click **Save**.

Items and Services

Event Ends 45 : 16
days hrs

Items Not In Lots (2 items)

Centrifugal Pump

500.00 USD
Expected Quantity x Price per Unit

Expected Quantity

Capacity

* Price per Unit

* Currency

1 Each

1

500

USD

>

IT Services

0.00 USD
Price per Unit

* Price per Unit

* Currency

USD

>

Items Not In Lots (2 items)

Event Ends 45 : 16
days hrs

Centrifugal Pump

Need By Date

Ship To Address

Details

Request Details

No address selected

No Request Details Present

Capacity

Expected Quantity

* Price per Unit

* Currency

1

1 Each

500

USD

Supplier Item Name

Item Description

ID/Part Number

Lead Time (days)

Attachments

Add [File](#) | [URL](#) | [Text](#)

Cancel

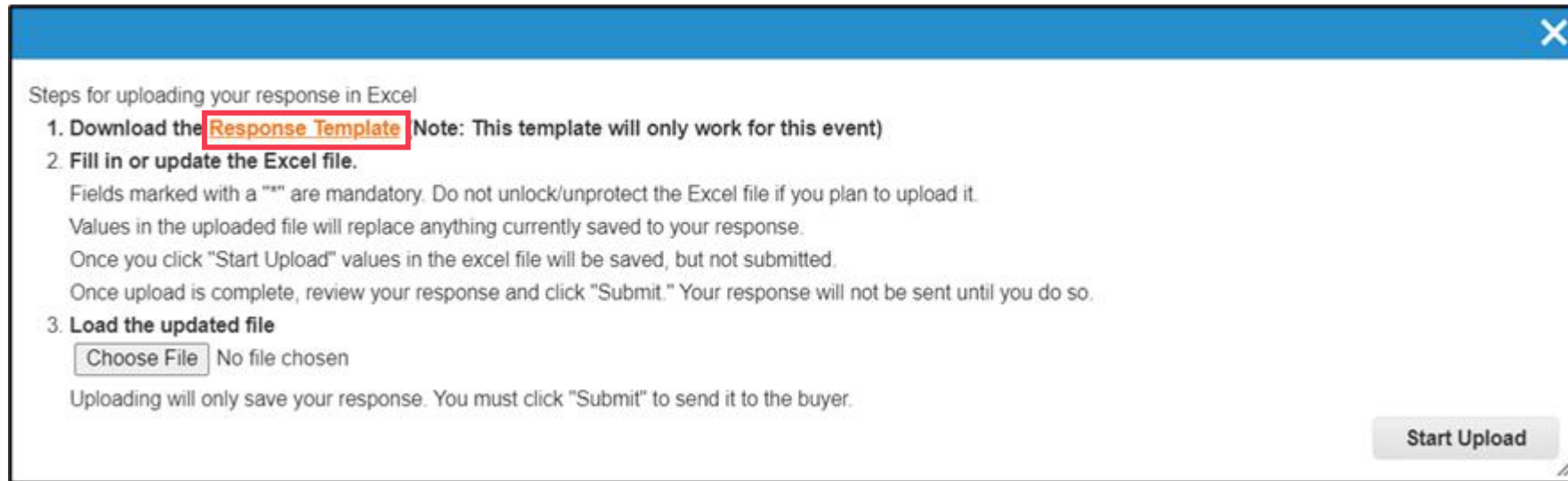
Save

Responding to Sourcing Events

If the Event contains several line items and/or if you want to answer the forms or questionnaires via Excel, click **Import from Excel....**



...then click download the Response Template to complete the item details and/or forms in an Excel spreadsheet.



Responding to Sourcing Events

You have the option to fill out either 'Items and Services' tab or 'Forms' tab or both. The cells in yellow are the only ones that need to be populated, but some are not required.

Item / Service	Item / Service Fields	Supplier Response Fields
Item Description (Text)	Expected Quantity (Number)	Need by Date (Date)
Centrifugal Pump	1	
IT Services		

Capacity (Number)	Unit Bid Price (Number)	Bid Price Currency (Text)	Lead Time (Integer)	Supplier Item Name (Text)	Item Part Number (Text)	Item Description (Text)
1		USD				

In the **Forms** tab, the yellow cells in Column H are required to be filled out.

Question	Type (Text)	Required (Text)	Answer
Distance of the following Warranty Period:	Radio Buttons	Yes	
Distance of the following payment terms:	Radio Buttons	Yes	
Manufacture/ship from location outside of the United States?	Radio Buttons	Yes	
	Text Field	Yes	
	Text Field	No	
Supplier explicitly states the ARAD and ARO	Radio Buttons	Yes	
Assumptions is clearly stated	Radio Buttons	Yes	
Shipping schedule (in Weeks) ARO	Text Field	Yes	
Offer is valid for 90 days from the date of original offer	Radio Buttons	Yes	
Offer is firm	Radio Buttons	Yes	
There will be no additional cost for Documentation, Testing and Packaging	Radio Buttons	Yes	
Current and forecast shop capacity / shop loading for the next calendar year	Text Area	Yes	
Supplier company is encountering or foresees any COVID-19 related supply chain / logistics	Radio Buttons	Yes	
Supplier company foresees any other potential risks or impacts	Radio Buttons	Yes	
Applicable Commissioning Spares and/or 2 Years Operational Spares are included in	Radio Buttons	Yes	

Responding to Sourcing Events

The table below summarizes the fields in the Items and Services tab, including which fields are required to be populated.

Field Name	Unit	Required?	Description
Capacity	Number	No	Indicates the number of items to bid. However, this cannot be more than the Expected Quantity (Number).
Unit Bid Price	Number	Yes	This is the Price Per Unit field where you will indicate how much you are bidding the item per quantity.
Bid Price Currency	Text	Yes	Select from the dropdown on which currency you'd like to bid on.
Lead Time	Integer	No	Lead time in Days - aims to support delivery time requirements by measuring the time it takes for a product to arrive at its end destination after an order has been placed. Populate only if applicable.
Supplier Item Name	Text	No	Name of item being bid on.
Item Part Number	Text	No	Each item may have its own item part number. Populate only if applicable.
Item Description	Text	No	Description of the item.

Responding to Sourcing Events

Once done, save the Excel file and click **Choose File** to load the spreadsheet. Click on **Start Upload** and a green banner showing "Excel import successful. Remember to submit your changes below." will appear.

×

Steps for uploading your response in Excel

1. Download the [Response Template](#) (Note: This template will only work for this event)
2. Fill in or update the Excel file.
Fields marked with a "*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.
Values in the uploaded file will replace anything currently saved to your response.
Once you click "Start Upload" values in the excel file will be saved, but not submitted.
Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
3. Load the updated file

Choose File en#Worley-Event#69.xlsx

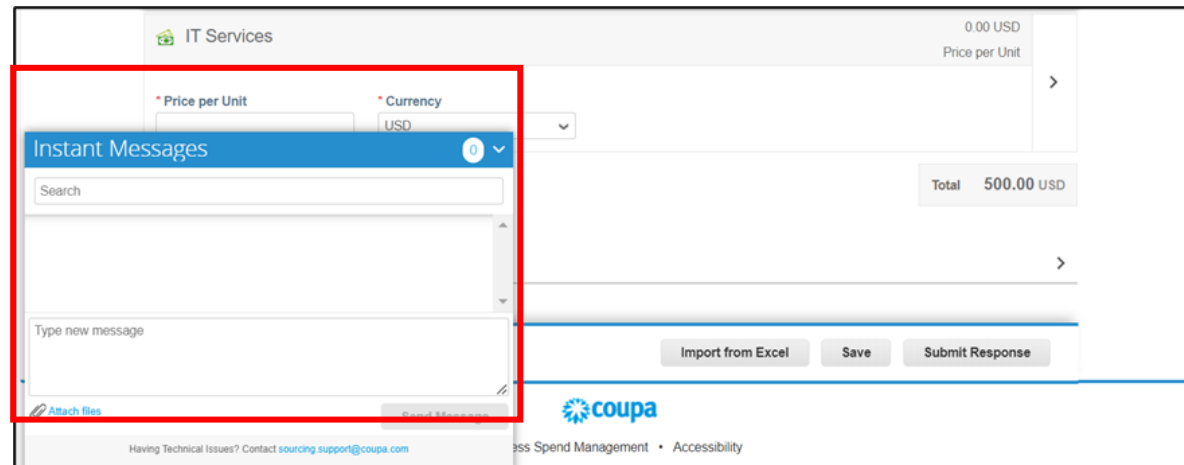
Uploading will only save your response. You must click "Submit" to send it to the buyer.

Start Upload

Responding to Sourcing Events

d. Instant Messages Board – ask questions or request clarification from Worley while the event is open.

Note: answering questions promptly through Coupa will reduce the need to call or email Worley. Additionally, the message board stores all questions and answers within the event for future reference and audit.



6. To submit the response, click **Submit Response**. Worley will receive a notification that the response was submitted.

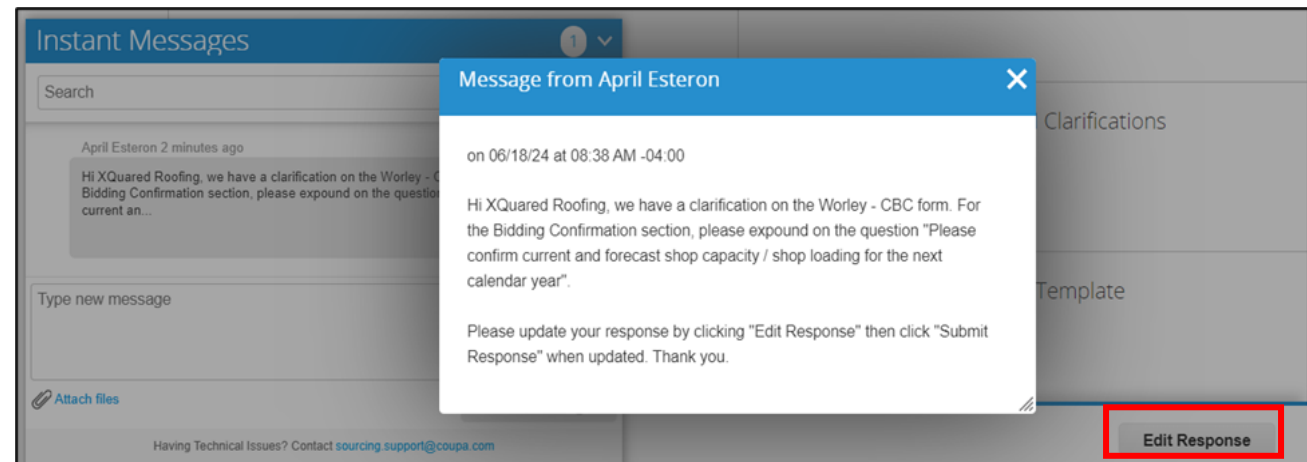


Responding to Sourcing Events

7. Worley will review and evaluate supplier responses and follow up as required. See the event terms and conditions for any further information.

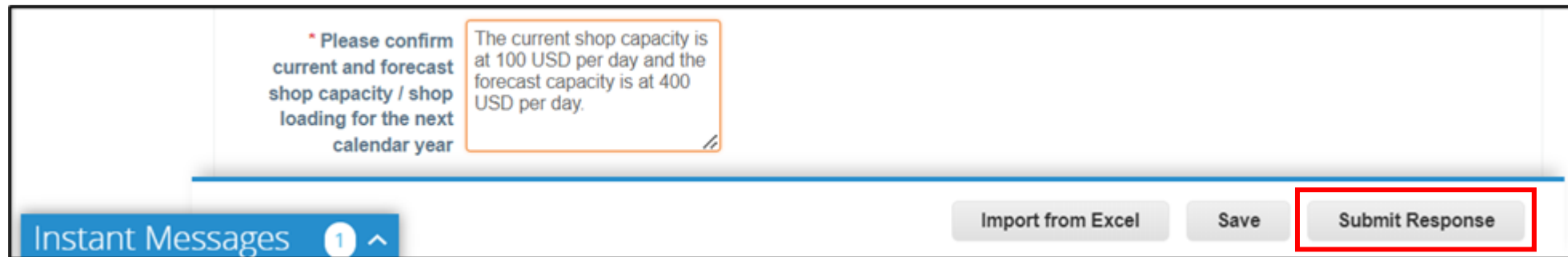
Note: How to reply to the Worley CBC (Commercial Bid Clarification) Form:
Should there be clarifications required on the form, please follow the steps below.

1. **Submit Response** as indicated in step #6 in previous slide (13). This will enable Worley buyers to see the supplier's response and review the Worley CBC form.
2. Worley buyer will send a message to the supplier via **Instant Messages** board. The supplier will then receive the message. If needed, attachments can also be sent both by the buyer and supplier.
3. Click on **Edit Response** to make changes on the form.



Responding to Sourcing Events

8. After editing the Worley CBC form, click '**Submit Response**' again to ensure it is received by the Worley buyer. Repeat this process as needed if further clarification is requested.



The screenshot shows a web interface for submitting a response. At the top, there is a text area with a red asterisk and the text: "Please confirm current and forecast shop capacity / shop loading for the next calendar year". To the right of this text area is a text box containing the text: "The current shop capacity is at 100 USD per day and the forecast capacity is at 400 USD per day." Below the text area and text box is a horizontal blue line. At the bottom left, there is a blue button labeled "Instant Messages" with a white circle containing the number "1" and a white upward arrow. At the bottom right, there are three buttons: "Import from Excel", "Save", and "Submit Response". The "Submit Response" button is highlighted with a red rectangular border.



worley

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