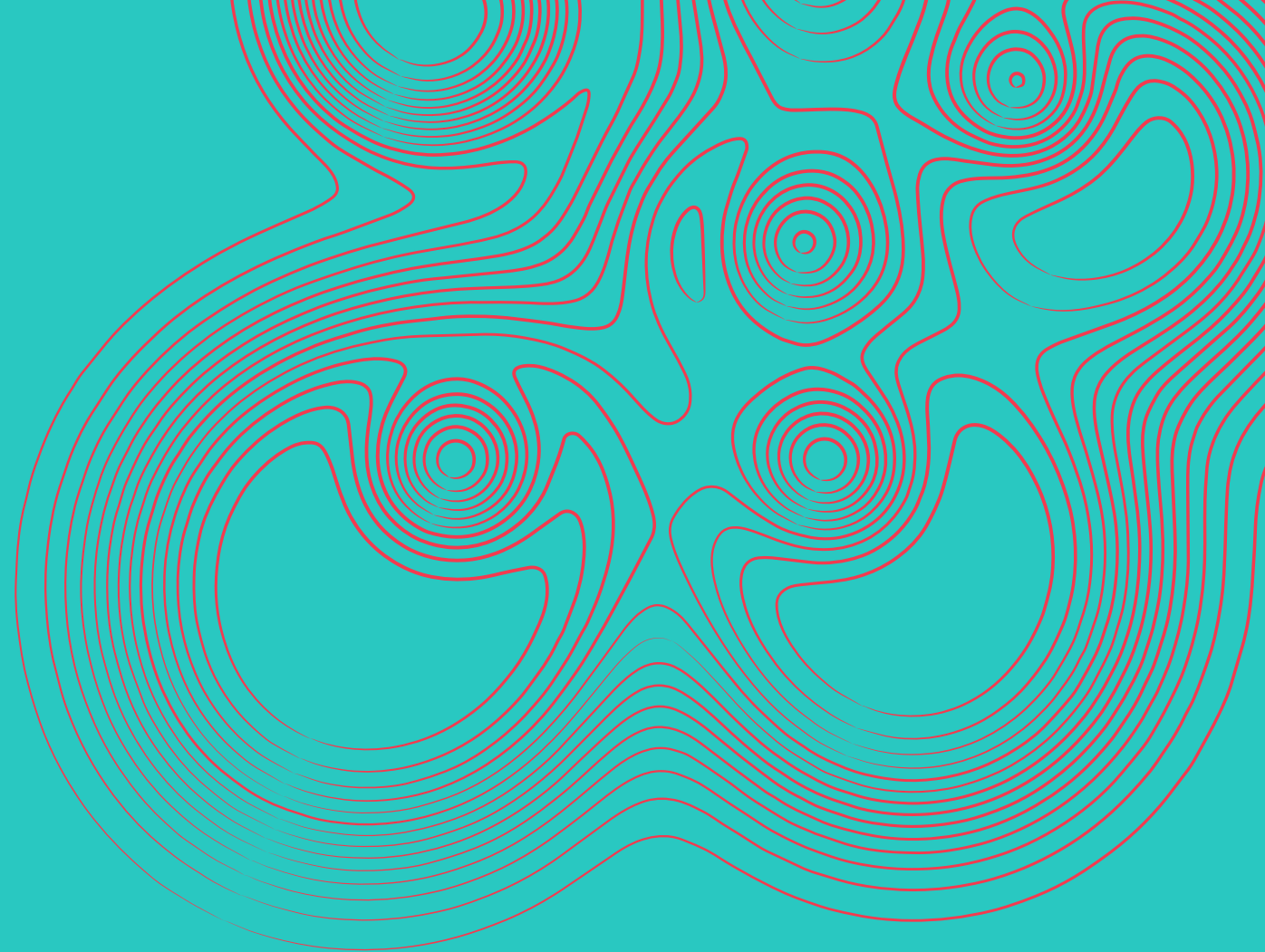


Coupa Supplier Training Guide

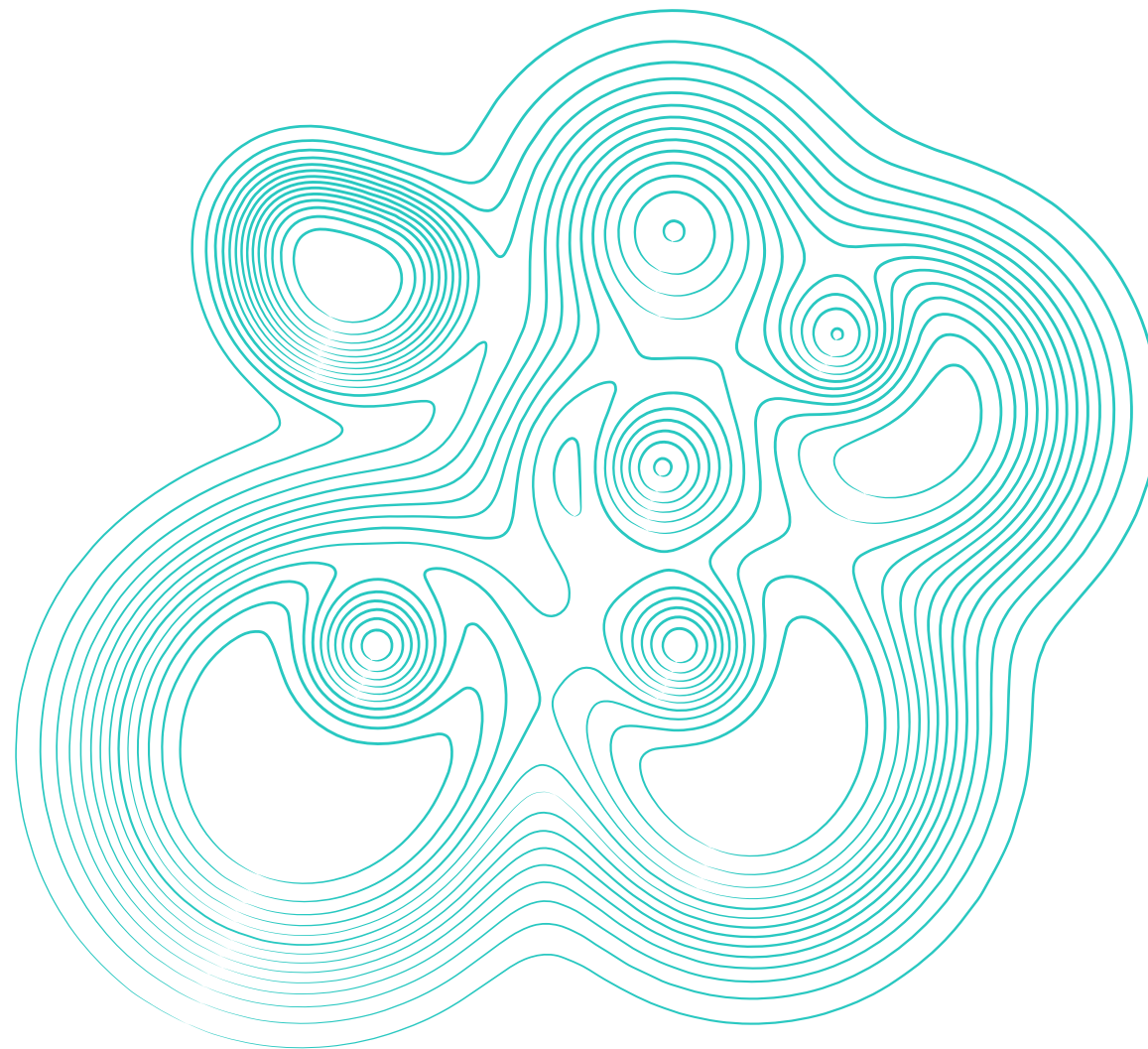
November 2024



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Introduction to Coupa



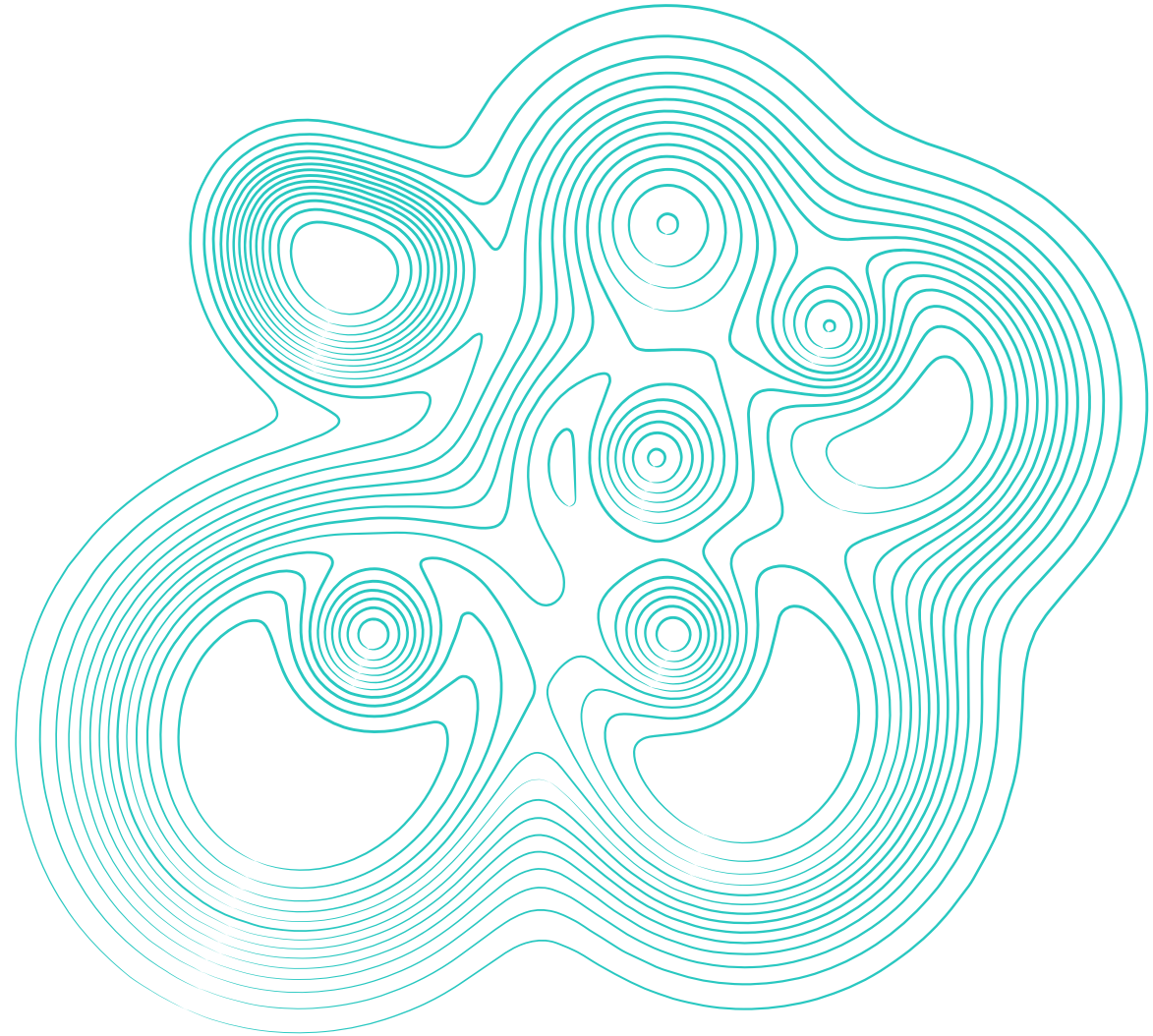
Why we choose Coupa?

- Coupa is a cloud or 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, Coupa is named a **Leader** for its completeness of vision and ability to execute in 2024. Coupa was placed as one of only two vendors named a Leader.
- One of the criteria that ranked Coupa as number 1 is its high user adoption
- 3 major releases or upgrades per year that are FREE of charge



COUPA SUPPLIER INFORMATION MANAGEMENT (SIM)

1. Invitations



Coupa Supplier Information | 3 Ways to Respond



Direct SIM Invitation

Worley will send a custom onboarding email and SIM Form to the supplier that will enable them to sign up via Coupa Supplier Portal and complete their supplier information creation and validation.



CSP Linked Update

Suppliers set up their accounts ahead of time, once Worley request the information update, you will be able to responds via your current CSP Account.



Forwarded Invitation from a Coworker

Suppliers can invite others within their organization to the Complete the Supplier information update by forwarding the invitation.

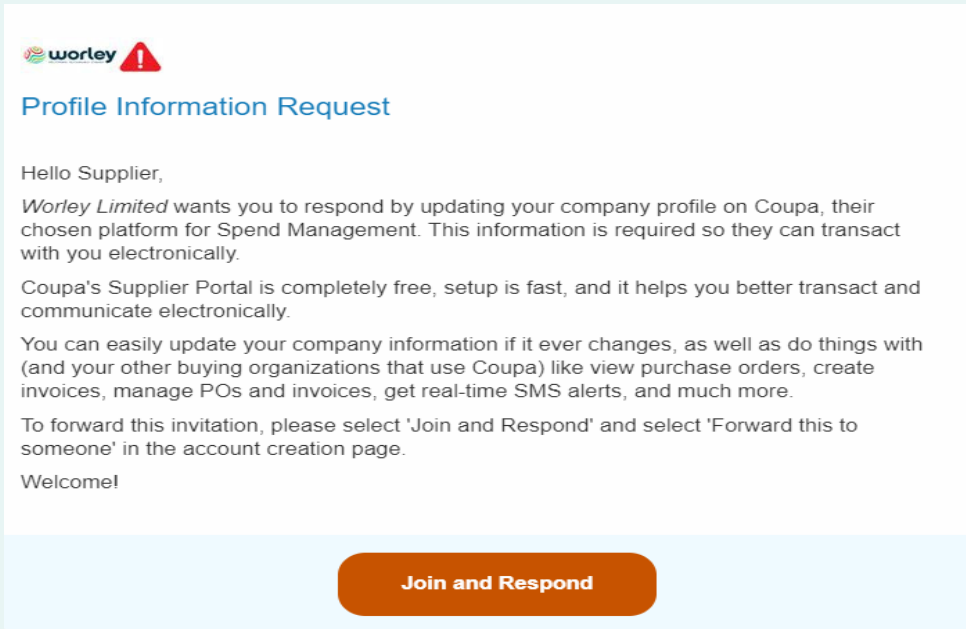
The Worley Invitation



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)



 **worley** 

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.

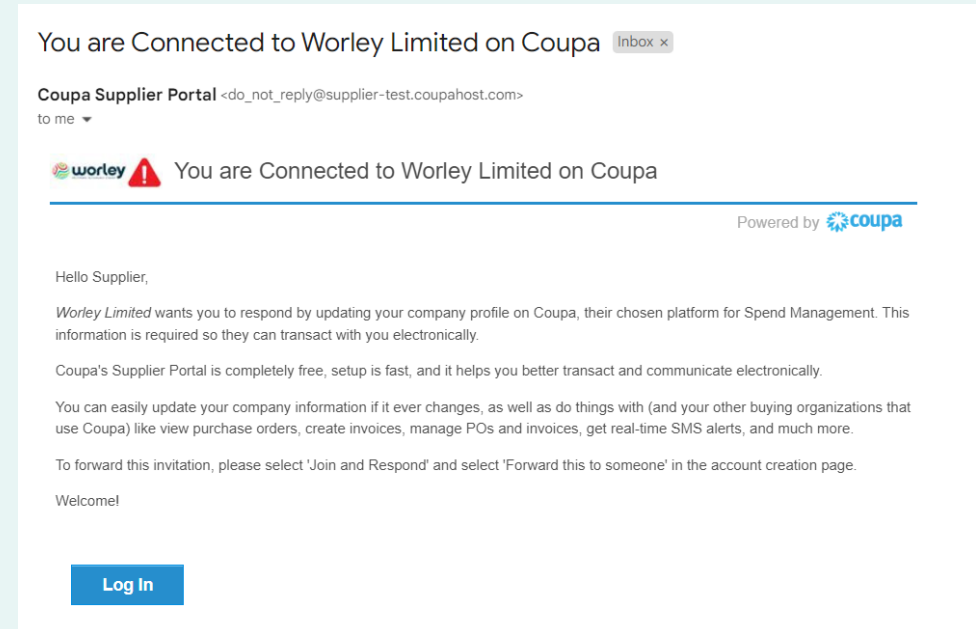
You can easily update your company information if it ever changes, as well as do things with (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

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 ▾

 **worley**  You are Connected to Worley Limited on Coupa

Powered by  **coupa**

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](#)

New to Coupa | Supplier Information Management SIM 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 their compliance and security measures click [here](#)



2 Create an Account

Worley Limited is using Coupa to transact 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.

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

*** 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](#)

worley

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!

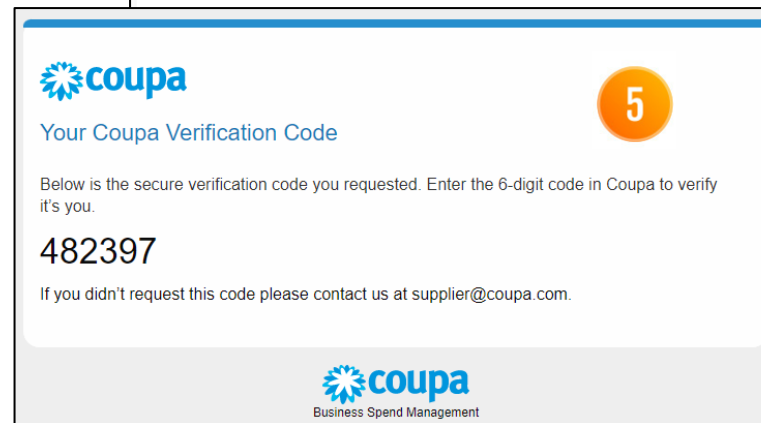
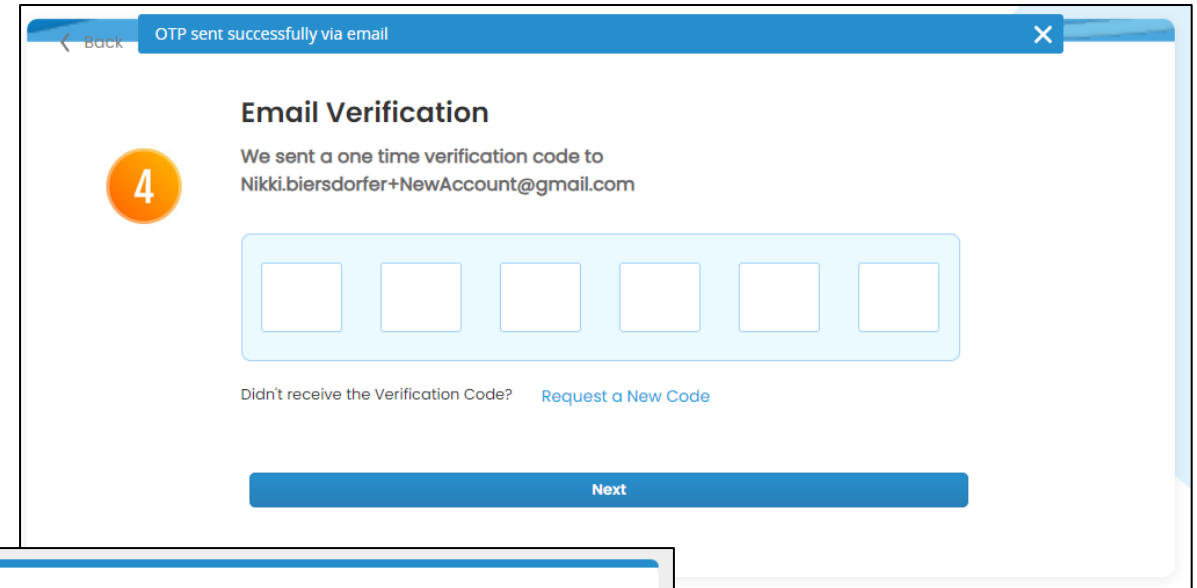
Join and Respond

Click here for:
Potential Supplier Information Fields
(expected to be entered by suppliers)

New to Coupa | Supplier Information Management

SIM Invitation

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




New to Coupa | Supplier Information Management SIM Invitation

6. Coupa will then 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 follow and will be optional if you select the “skip for now” option

worley  **Your Contact Info**

A


* First Name: Nikki
* Last Name: Biersdarfer

Work Phone: Country/Region, Area/City, Local, Extension

* Business Website:
 I do not have a website

* Country/Region of Primary Address:

Next

worley  **Make Sure You Get Paid**

Confirm location addresses

B

Primary:

* 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:

Next

 [Skip for Now](#)

New to Coupa | Supplier Information Management

SIM Invitation

7

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 be taken to all your account.
9. You will be taken to the Worley Supplier Information Form. It is here you will start answering questions that are applicable to your company

The screenshot shows the Coupa Supplier Portal interface. At the top right, there is a 'NOTIFICATIONS' link with a red badge containing the number '5'. A notification dropdown is open, displaying the message: 'An information update request is received. Update your profile for Worley Limited.' Below the message are two links: 'See All Notifications' and 'Notification Preferences'. The main content area is titled 'My Notifications' and features a 'View' dropdown set to 'All'. Below this, there is a table of notifications:

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	You are now connected to Worley Limited - CCC 123 Consulting Services	10/23/24 07:52 PM
<input type="checkbox"/>	Update your profile for Worley Limited - CCC 123 Consulting Services	10/23/24 07:52 PM

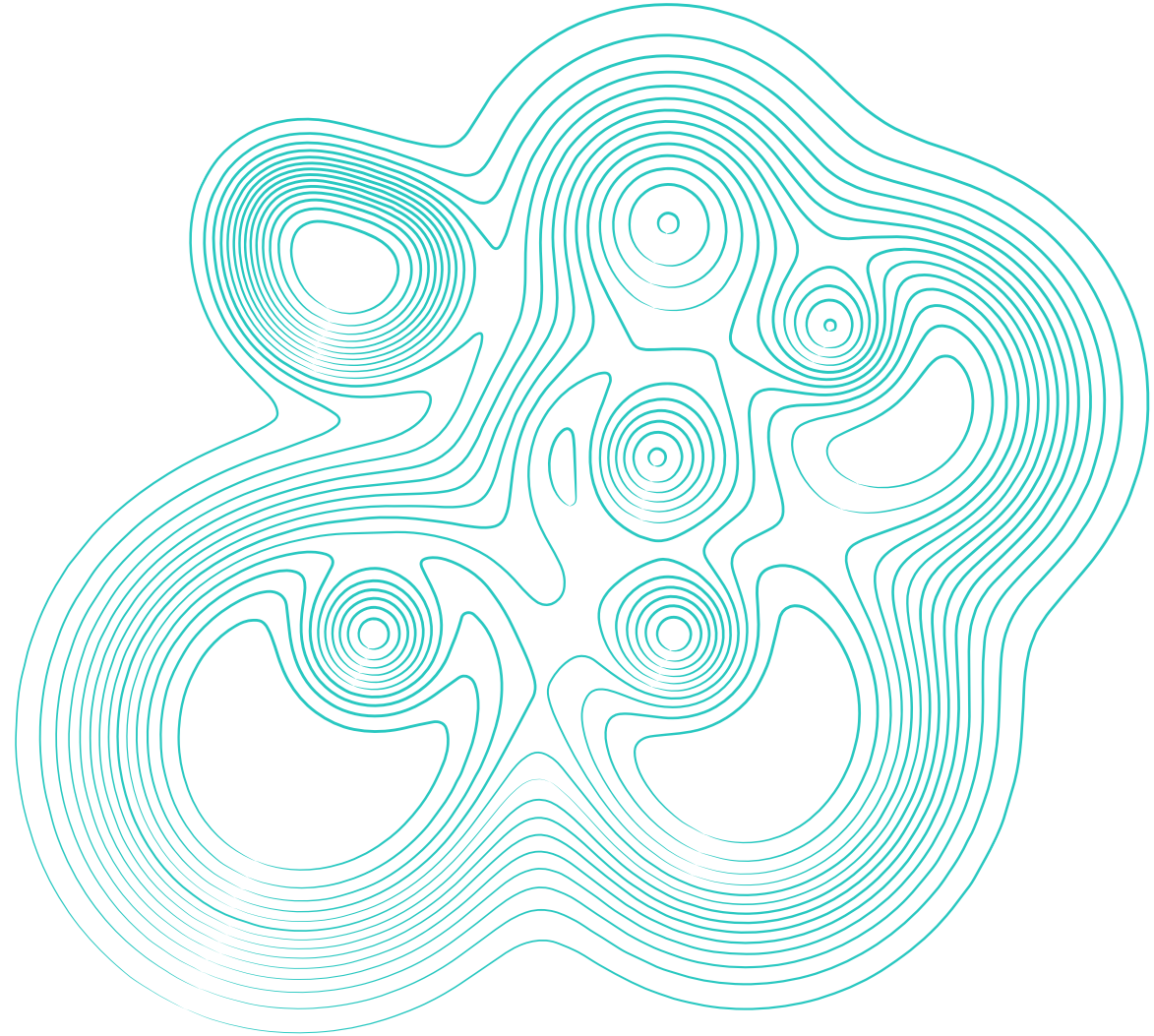
8

9

The screenshot shows the 'Worley Limited' profile page in the Coupa Supplier Portal. The page title is 'Worley Limited' and the profile is set to 'Worley Limited'. There are two yellow informational banners at the top: 'We have auto-filled some information from your Public Profile.' and 'Choose the correct State or Region unless you need to keep the current value.' Below these, the page is titled 'Supplier Profile Form v22' and 'Form 2: Supplier Profile Form'. The 'Supplier Information' section shows 'X-Machina'. The 'Supplier Profile Form' section includes a 'Company Name' field with the value 'Supplier Example' and a 'Company Trading Name' field with the value 'Supplier Example'. A note at the bottom states 'Populate if different from Company Name'.

COUPA SUPPLIER
INFORMATION
MANAGEMENT (SIM)

**2. Information
Management**



New to Coupa | Supplier Information Management SIM Invitation

10

10. You can also access this supplier information request by navigating your Coupa Supplier Portal (CSP)

A. Select Profile

B. Select Information Requests

C. Confirm Worley is the Profile Selected

HINT: this form will default information from your Coupa supplier profile. While you are reviewing and completing this form, the fields can be updated for accuracy.

11. As you review this form, fields with a * are required. Also, there will be conditional fields that will appear as needed based on your answers. The next slides are an outline of the fields included.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is visible, along with user information 'JOE' and 'NOTIFICATIONS 1'. The navigation menu includes 'Invoices', 'Orders', 'Profile' (highlighted), 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below the navigation, the current profile is 'Worley Limited'. A notification bar states: 'We have auto-filled some information from your Public Profile.' Below this, a yellow warning bar says: 'Choose the correct State or Region unless you need to keep the current value.' The main content area is titled 'Supplier Profile Form v22' and 'Form 2: Supplier Profile Form'. Under 'Supplier Information', the company name is 'X-Machina'. The 'Supplier Profile Form' section includes a required field for 'Company Name' with the value 'Supplier Example' and a 'Company Trading Name' field with the value 'Supplier Example'. A note below the trading name field says 'Populate if different from Company Name'. A '11' callout points to the 'Company Name' 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 for Worley Limited. The navigation bar includes 'Invoices', 'Orders', 'Profile' (selected), 'Setup', and 'Service/Time Sheets'. Below the navigation, there are tabs for 'Your Profile', 'Information Requests', and 'Performance Evaluation'. The main content area displays 'Worley Limited' and a message: 'We have auto-filled some information from your Public Profile.' The form is titled 'Supplier Profile Form v25' and 'Form 2: Supplier Profile Form'. Under 'Supplier Information', it shows 'PO Supplier - Test 5 - MC'. The 'Supplier Profile Form' section has a red asterisk next to 'Company Name' and a text input field containing 'PO Supplier - Test 5 - MC'. Below it is a 'Company Trading Name' field, which is currently empty. A note at the bottom of the form says 'Populate if different from Company Name'.

Fields – Supplier Profile Form

- **Company Name***
- Company Trading Name
- **Tax Registration***
- **Company Identification Number***
- Permanent Account Number (PAN)
- **Date Established***
- **Proof of Company Registration* (A)**
- Previously Used different names
- DUNS Number
- **Primary Address***
- **SIM – Primary Contact***
- Website
- Parent Company Legal Name
- Parent Company Address Sub form
- **Preferred Communication Language***
- **Company legal structure or Organization Type***
- **Company Registration Type***
- Shareholder Details
 - Download "Shareholder Details" spreadsheet, Fill Out and Upload back
- Other Registration Type
- **Company Type***
- **Default Commodity***
- **Other Business Activities***
- Company Brochure (A)
- Licenses and Permits (A)
- **Sectors*** (where capable of providing services, goods and materials, products or works)
- **Scale of Operations***
- **Countries where products/services provided**
- **Countries, where regulated by a government agency***
- **Countries where subject to regulatory oversight***
- **Total number of employees***
- **Principal Customer 1***
- **Percentage of Turnover***

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?

Select

*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

Diversity

- **Diversity Ownership***
 - Diversity Category (C)
 - Effective Date (C)
 - Expiry Date (C)
 - Diversity Ownership Attachment (C)(A)
 - Diversity Ownership Percentage (C)
- **Is your diversity type as "Native/Indigenous Owned"?***
 - Identify Indigenous Ownership Type (C)
 - Percent of Indigenous Ownership (C)
 - Indigenous Community (C)
 - Location and Territory of Indigenous (C)

Banking Details

- **SIM Remit to***
- **Remit to Address***
- **Bank Information***
- **Banking support Document***
- **Is Freight Terms applicable/not applicable?***
- **Freight Terms***
- **Is tax applicable/not applicable?***
- **Invoice Tax Code***
- **Is Withholding tax/ TDS (WHT/TDS) applicable?***
- **Withholding tax/TDS (WHT/TDS)***

* **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?*
- **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?
 - 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 SOC2 Type II
 - SOC2 Type II Certificate (A)
 - Is Company accredited with SOC1 Type II
 - SOC1 Type II Certificate (A)
 - Is Company accredited with Cybervadis?
 - Cybervadis Scorecard (A)
 - Any Other Certification (A)
 - Additional Certification (A)
- **Privacy Regulation***
 - Does your Company have a privacy policy in place and is in compliance with applicable privacy regulations?*
 - Please describe the review process and frequency.

* **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).

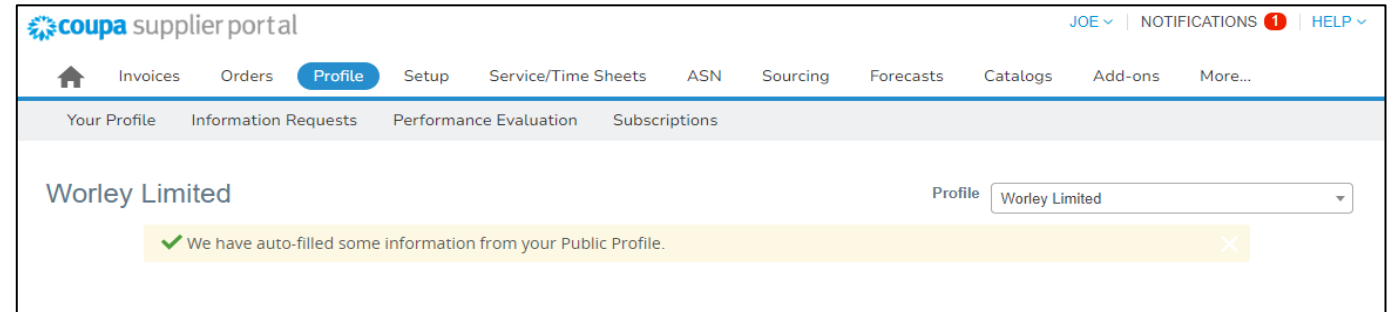
Non-disclosure and confidentiality agreement	No
Please review the Non-disclosure and confidentiality agreement here - Non-Disclosure and Confidentiality Agreement Check the box if you acknowledge Non-disclosure and confidentiality agreement.	
Worley Code of Conduct	No
Please review the Worley Code of 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

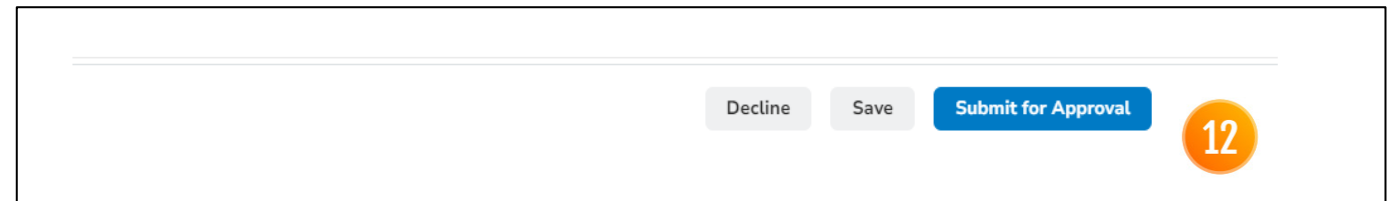
- **Do you or any of your owners, shareholders, directors, officers, or key employees have any relationship with Worley, its employees, or related parties?*** (C)
 - Name
 - Location
 - Relationship details
 - Is there any other information you would like to disclose about your Company including but not limited to affiliated entities, shareholders, owners, directors, officers, key employees concerning any existing or suspected conflict of interest, sanctions, debarment and any other allegations that may be relevant to an engagement with Worley?
 - **Will you interact with government officials on behalf of Worley?***
-
- 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*
 - CIS Status
 - Unique Tax Reference
 - NI/Company registration
 - CIS Name

New to Coupa | Supplier Information Management SIM Invitation

12. Once you are done completing the form, you will see a submit for approval button. Please select

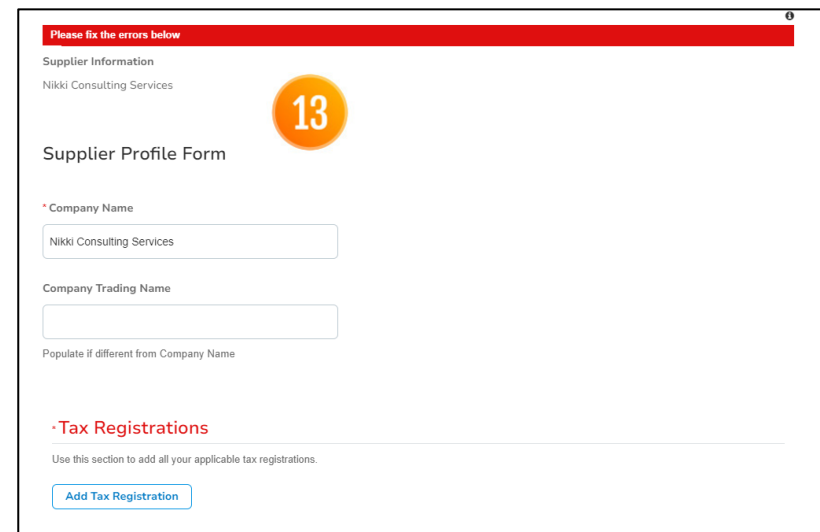


The screenshot shows the 'coupa supplier portal' interface. The user is logged in as 'JOE'. The navigation menu includes 'Invoices', 'Orders', 'Profile' (highlighted), 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below the navigation, there are sub-tabs: 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area displays 'Worley Limited' and a dropdown menu for 'Profile' set to 'Worley Limited'. A yellow notification bar states: 'We have auto-filled some information from your Public Profile.' with a close button.



This screenshot shows the bottom of the profile page. It features three buttons: 'Decline', 'Save', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted in blue. To the right of these buttons is a circular orange badge with the number '12'.

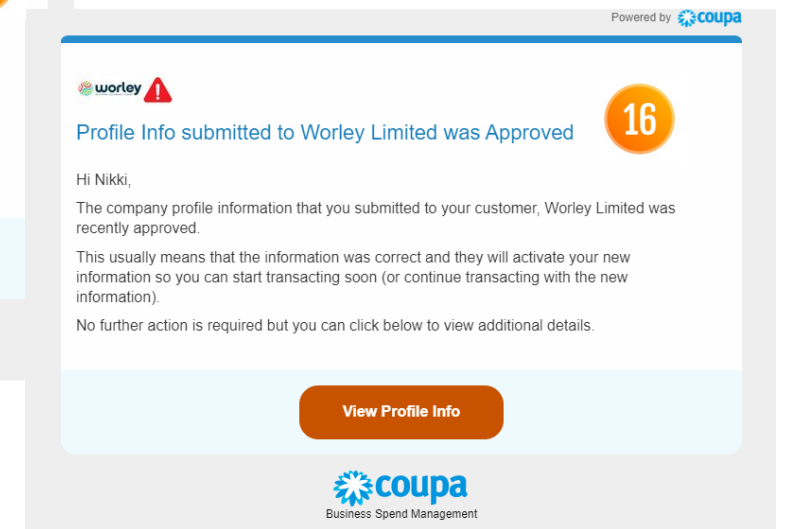
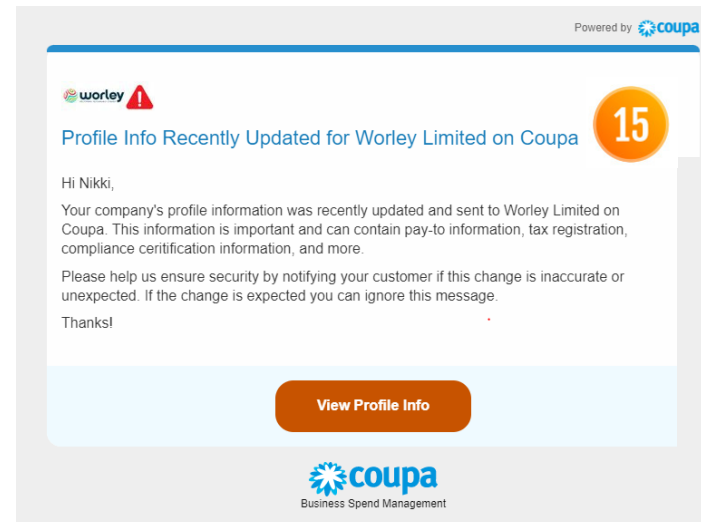
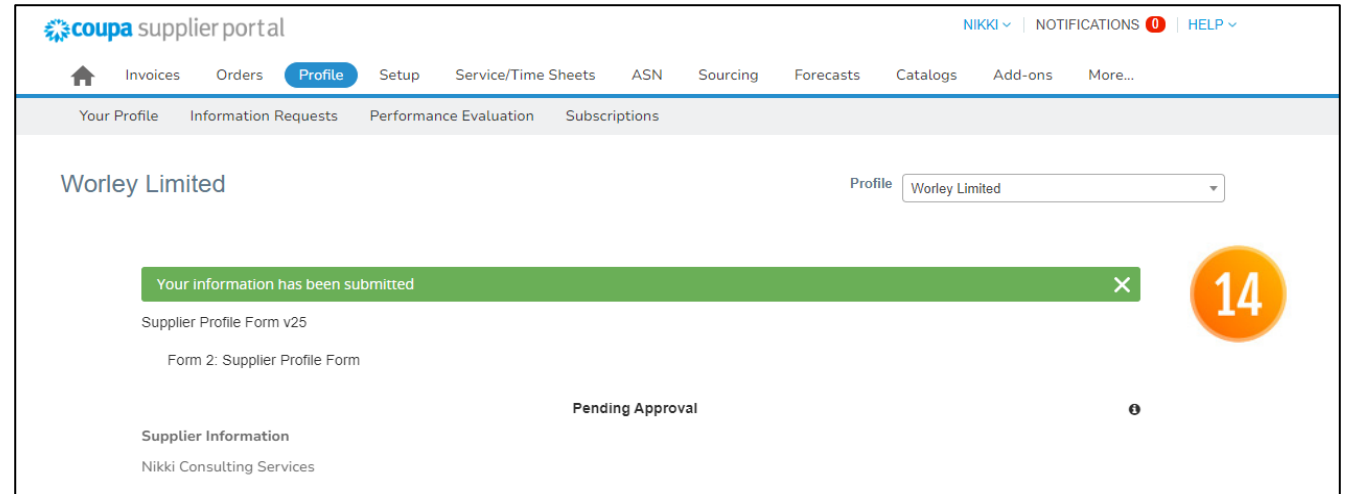
13. **If you had any missing required fields, you would receive a red error bar. The missing or incorrect fields will also turn red, giving you direction on where what information is missing or needs to be addressed.



The screenshot shows the 'Supplier Profile Form' for 'Nikki Consulting Services'. A red error bar at the top reads 'Please fix the errors below'. A circular orange badge with the number '13' is positioned to the right of the error bar. The form includes fields for 'Company Name' (filled with 'Nikki Consulting Services') and 'Company Trading Name' (empty). Below these fields is the text 'Populate if different from Company Name'. Further down, there is a section for 'Tax Registrations' with the instruction 'Use this section to add all your applicable tax registrations.' and an 'Add Tax Registration' button.

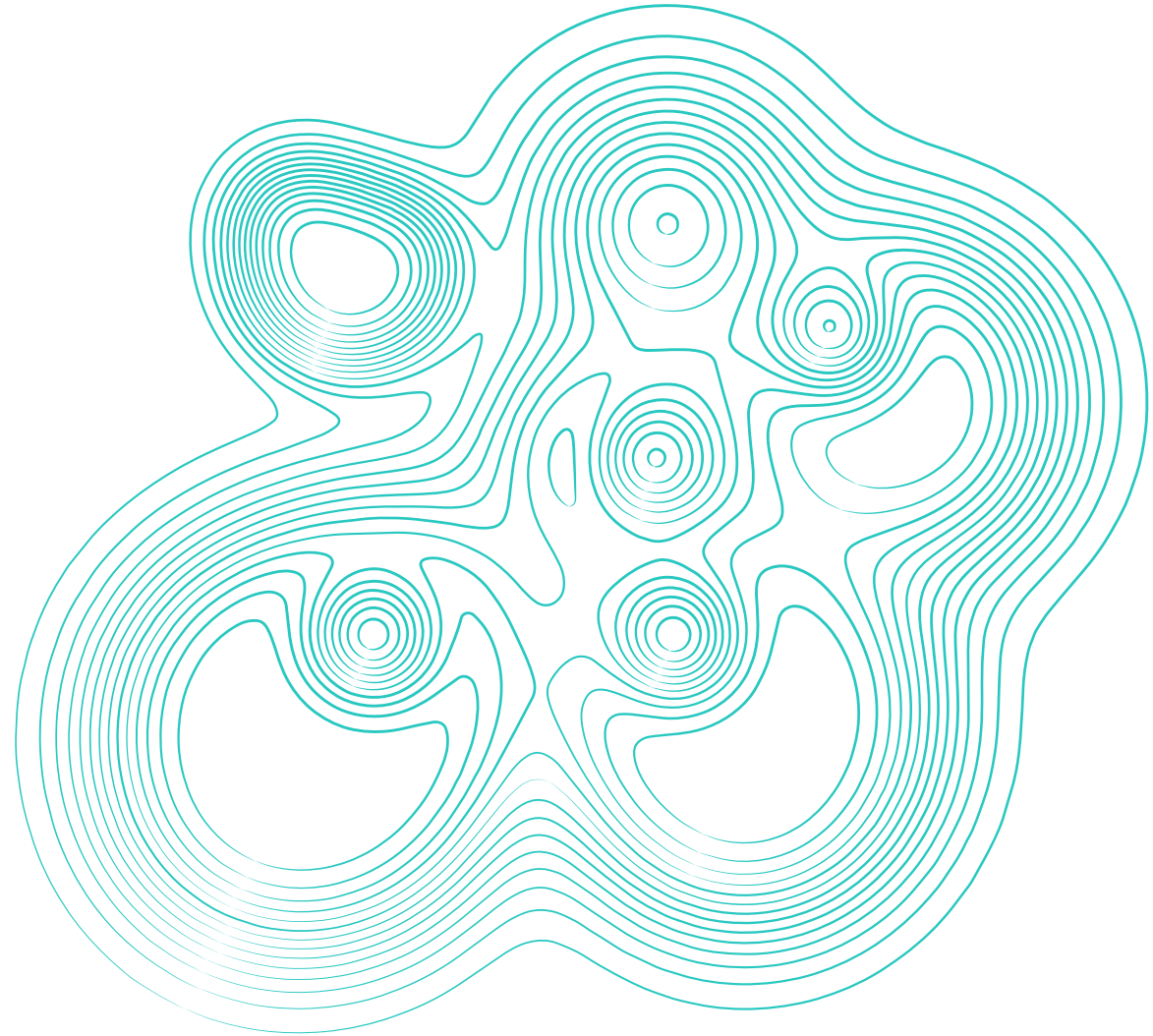
New to Coupa | Supplier Information Management SIM Invitation

14. After you select Submit for approval – you will receive a green bar. This indicates your form has submitted back to Worley for review.
15. Also upon submission, you will receive an email notification that your supplier information was successfully submitted for review.
16. Upon Worley’s internal approval you will also receive an email notification letting you know your information has been accepted for review.



COUPA SUPPLIER PORTAL (CSP)

1. Introduction



Coupa Supplier Portal | Introduction

The Coupa Supplier Portal is a free tool for suppliers to easily do business with their customers. The Coupa Supplier Portal makes managing procurement and its transactions easy. Depending on the specific Coupa configuration, content and settings can be managed on a customer-by-customer basis.



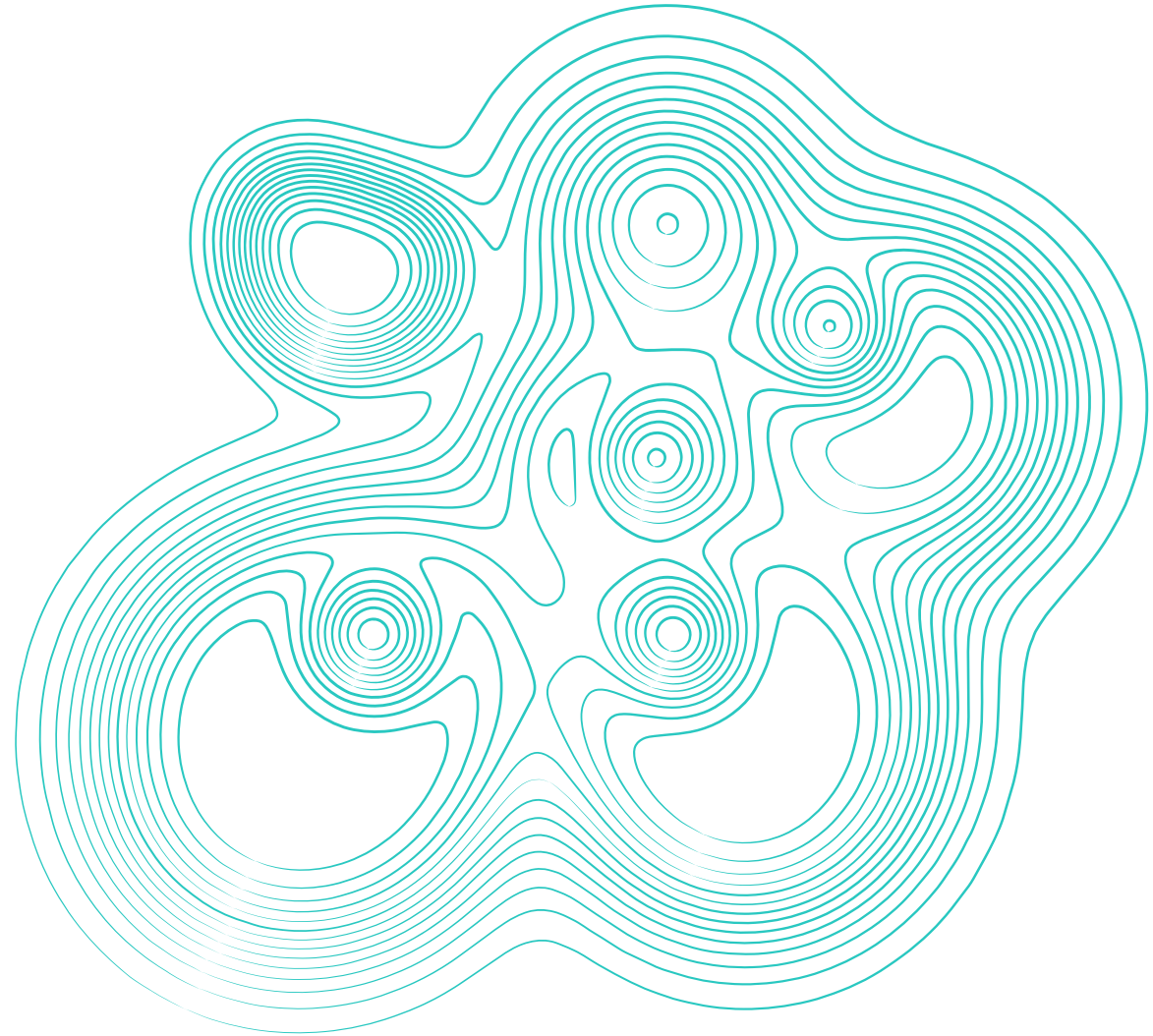
Attributes

(from Supplier POV)

Purpose	Efficiently conduct business with Worley (i.e., interact with buyers and manage various aspects of their relationship beyond sourcing events)
Functionality	Suppliers can: <ul style="list-style-type: none">• Manage supplier information• Update profile and payment information
Focus	Interface to interact with buyers across different procurement processes & transactions including sourcing and supplier management (and purchasing + invoicing potentially in the future)
User Role	Suppliers use to collaborate with buyers
Account Management	Accounts are managed individually for each supplier, with the option to add multiple users to each account, as necessary.

COUPA SUPPLIER PORTAL

2. Manage Profile



Coupa Supplier Portal | Manage Profile

A. Public Profile*

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

To get started filling out your profile information:

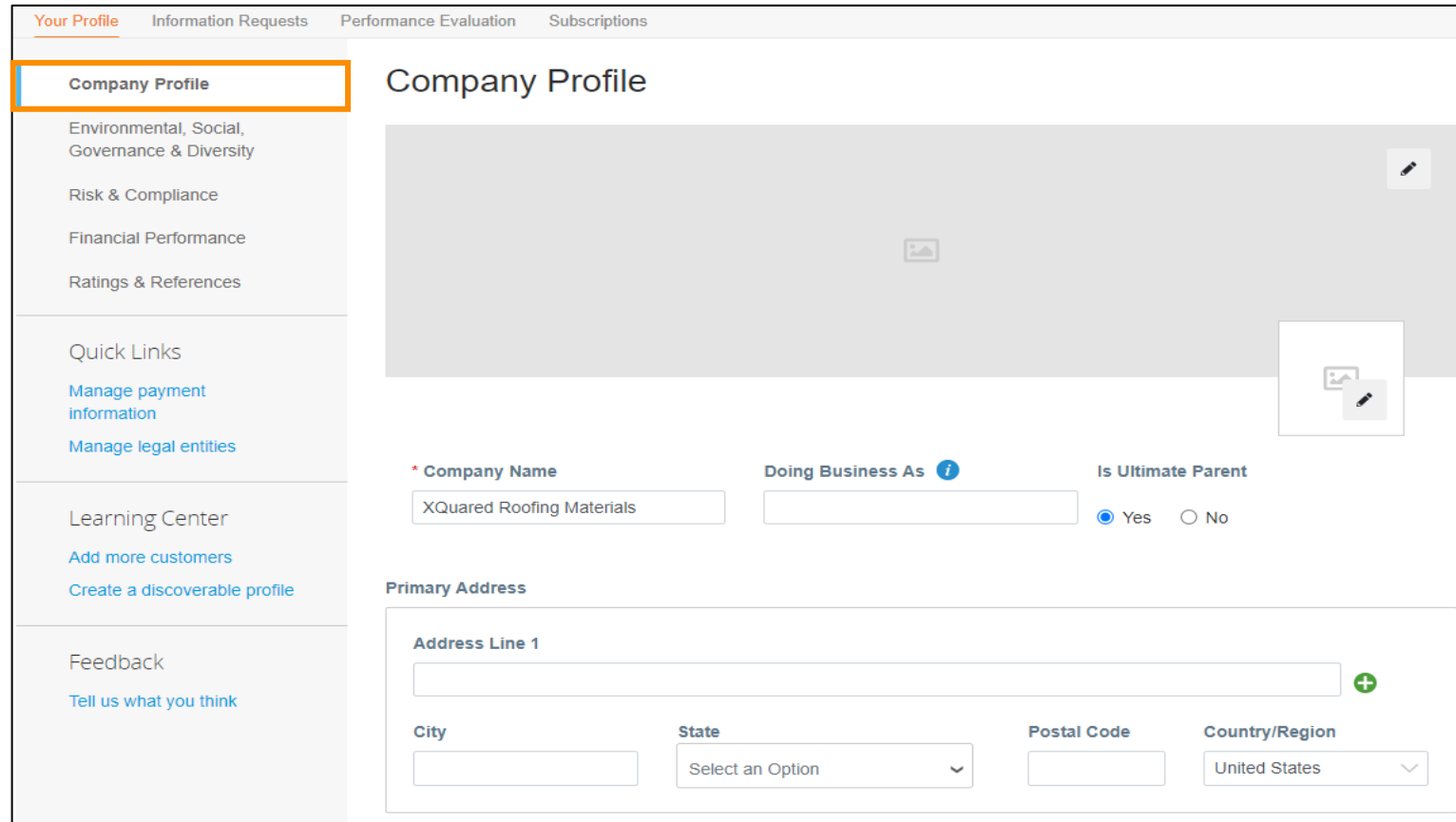
1. Select **Profile** in the top menu.
2. Click **Edit Profile** to take you to the section you select so you can complete your information.

The screenshot displays the Coupa Supplier Portal interface. At the top, the user is identified as APRIL MICAH, with a notification count of 0 and a help link. The main navigation bar includes Home, Profile (marked with a '1'), Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. Below this, a sub-navigation bar shows 'Your Profile' (selected), 'Information Requests', and 'Performance Evaluation'. The 'Your Profile' section is active, showing a 'Company Profile' overview with a progress bar for 'XQuared Roofing Materials v6' at 12%. A yellow banner above the progress bar encourages completing the profile. Below the progress bar, a yellow banner for 'Worley Limited - XQuared Roofing Materials v6' includes a 'Start Getting Paid' link. The 'Edit Profile' button is highlighted with a red box and a '2' marker. The page also includes a 'Quick Links' section and footer links for 'Profile preview', 'Copy profile URL', and 'Download Profile as PDF'.

Coupa Supplier Portal | Manage Profile

1. Company Profile

The Company Profile section gives customers background information about your business, such as what your business does, how customers can contact your business, and how they can interact with your business on social media.



The screenshot displays the 'Company Profile' section of the Coupa Supplier Portal. The navigation menu on the left includes 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The 'Company Profile' menu item is highlighted. Below the navigation menu, there are sections for 'Environmental, Social, Governance & Diversity', 'Risk & Compliance', 'Financial Performance', and 'Ratings & References'. A 'Quick Links' section contains links for 'Manage payment information' and 'Manage legal entities'. A 'Learning Center' section contains links for 'Add more customers' and 'Create a discoverable profile'. A 'Feedback' section contains a link for 'Tell us what you think'.

The main content area is titled 'Company Profile' and features a large image placeholder with a pencil icon for editing. Below the image placeholder, there are form fields for 'Company Name' (XQuared Roofing Materials), 'Doing Business As', and 'Is Ultimate Parent' (Yes/No). The 'Primary Address' section includes a text input for 'Address Line 1', a 'City' input, a 'State' dropdown menu (Select an Option), a 'Postal Code' input, and a 'Country/Region' dropdown menu (United States).

Coupa Supplier Portal | Manage Profile

2. Environmental, Social, Governance & Diversity

The Environmental, Social, Governance & Diversity section gives your customers information about how your business engages with social goals.

The screenshot shows the 'Your Profile' page in the Coupa Supplier Portal. The navigation menu on the left includes 'Company Profile', 'Environmental, Social, Governance & Diversity' (highlighted with an orange box), 'Risk & Compliance', 'Financial Performance', 'Ratings & References', 'Quick Links', 'Learning Center', and 'Feedback'. The main content area is titled 'Environmental, Social, Governance & Diversity' and contains three sections: 'Supplier Diversity & Inclusion' with a 'Diversity Classifications and Certifications' box containing an 'Add' button; 'Tier Two Supplier Diversities' with three questions: 'Do you have a Workplace Diversity program?' (No selected), 'Do you have a Supplier Diversity program?' (No selected), and 'Do you measure Tier 2 Diversity spend?' (No selected); and 'Anti-Bribery & Anti-Corruption' with a 'Bribery and Corruption Policy' box containing 'Yes, we have a policy' and 'No' options.

Coupa Supplier Portal | Manage Profile

3. Risk & Compliance

The Risk & Compliance section gives your customers information the risk and compliance considerations they need to understand to do business with your company.

The screenshot displays the 'Your Profile' page in the Coupa Supplier Portal. The navigation menu on the left includes 'Company Profile', 'Environmental, Social, Governance & Diversity', 'Risk & Compliance' (highlighted with an orange border), 'Financial Performance', and 'Ratings & References'. Below this are 'Quick Links' (Manage payment information, Manage legal entities), 'Learning Center' (Add more customers, Create a discoverable profile), and 'Feedback' (Tell us what you think). The main content area is titled 'Risk & Compliance' and contains two sections: 'Risk Management' and 'Information Security'. The 'Risk Management' section asks 'Is a risk management program in place to assess risk across the company?' with radio buttons for 'Yes' and 'No' (selected). The 'Information Security' section contains three questions: 'Is a code of conduct policy in place across the company?' (Yes/No, No selected), 'Is a physical security policy in place?' (Yes/No, No selected), and 'Are background checks performed on employees and contractors before they are granted access to data?' (Yes/No, No selected). A fourth question, 'Is a change management policy in place?', is also present with 'Yes' and 'No' (selected) radio buttons.

Coupa Supplier Portal | Manage Profile

4. Financial Performance

The Financial Performance section shows information about your business's financials. This section doesn't display on your profile, and you can choose to include it on your profile PDF.

Your Profile Information Requests Performance Evaluation Subscriptions

Company Profile

Environmental, Social, Governance & Diversity

Risk & Compliance

Financial Performance

Ratings & References

Quick Links

[Manage payment information](#)

[Manage legal entities](#)

Learning Center

[Add more customers](#)

[Create a discoverable profile](#)

Feedback

[Tell us what you think](#)

Financial Performance

Preferred Currencies

Search currencies...

All amounts in

Balance Sheet

Net Loss/Profit	Current Liabilities
<input type="text"/>	<input type="text"/>
Book Value	Other Assets
<input type="text"/>	<input type="text"/>
Total Assets	Other Liabilities
<input type="text"/>	<input type="text"/>
Working Capital	Account Receivable
<input type="text"/>	<input type="text"/>

Coupa Supplier Portal | Manage Profile

5. Ratings & References

The Ratings & References section shows information about who you do business with, your accomplishments, and your competition and peers.

The screenshot displays the 'Ratings & References' section of the Coupa Supplier Portal. The interface includes a top navigation bar with tabs for 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. A left-hand sidebar contains a menu with the following items: 'Company Profile', 'Environmental, Social, Governance & Diversity', 'Risk & Compliance', 'Financial Performance', 'Ratings & References' (highlighted with an orange border), 'Quick Links' (with sub-links for 'Manage payment information' and 'Manage legal entities'), 'Learning Center' (with sub-links for 'Add more customers' and 'Create a discoverable profile'), and 'Feedback' (with sub-link 'Tell us what you think'). The main content area is titled 'Ratings & References' and contains several sections: 'Customers' with an 'Add Customer' link; 'Accomplishments' with a sub-section 'Awards, Distinctions and Projects' and an 'Add' link; 'Brands' with an 'Add Brand' link; 'Competitors' with an 'Add Competitor' link; and 'Peers' with an 'Add Peer' link. At the bottom right of the main content area, there are 'Cancel' and 'Save changes' buttons.

Coupa Supplier Portal | Manage Profile

B. Customer Profile

In the Coupa Supplier Portal, you have profiles for each of your customers you are connected to which allows you to **manage** the information you provide to your customers. Some of your customers may send you Information Requests that you complete to update your information with that customer.

1. Go 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. If the Information Request includes Remit-To Addresses, select **Add Remit-To**.
4. 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.
5. Once all supplier information fields are completed, click **Submit for Approval**.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Profile' tab is selected, and a dropdown menu shows 'Worley Limited - XQuared Roofing Materials v6'. Below this, the 'Supplier Information Update Form' is visible, with a 'Supplier Legal Name' field. A 'Choose Remit-To Address' modal window is open, showing a list of addresses and a 'Choose' button. A 'Remit-To Addresses' section is also visible, with an 'Add Remit-To' button. At the bottom, there are 'Decline', 'Save', and 'Submit for Approval' buttons.

Coupa Supplier Portal | Manage Profile

C. Customer Profile Updates

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

1. Go 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. Verify applied status, scroll to the bottom
4. Select **Update Info**, the form will then become editable

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'coupa supplier portal', user 'NIKKI', 'NOTIFICATIONS 5', and 'HELP'. The main navigation menu has 'Profile' highlighted with a '1' callout. Below it, a secondary menu shows 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The main content area shows 'Worley Limited' with a dropdown menu highlighted by a '2' callout. Below this is the 'Supplier Profile Form v25' section, featuring the 'OneSource' logo and 'Form 2: Supplier Profile Form'. A status box shows 'Applied' with a '3' callout. Under 'Supplier Information', 'Nikki Consulting Services' is listed. At the bottom, the 'Supplier Profile Form' section has an 'Update Info' button highlighted with a '4' callout. The footer contains 'Decline', 'Save', and 'Submit for Approval' buttons, with 'Submit for Approval' highlighted by a '5' callout.

Coupa Supplier Portal | Manage Profile (CONT)

C. Customer Profile Updates

5. Be sure to review all fields along with those you are updating.

The following fields will need to be revalidated/completed each time you update the supplier information form, they are all REQUIRED to be able to update.

- Preferred Language
- Principal Customer 1
- Percentage of Turnover
- Are you identified as a Diverse Supplier?
- Is your diversity type Native/Indigenous Owned?
- Is Freight Terms applicable/not applicable?
- Is tax applicable/not applicable?
- Is Withholding tax/ TDS (WHT/TDS) applicable
- Have you answered any of the previous three questions as "Yes"?
- Is it an International or Domestic Bank?

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

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'NIKKI', 'NOTIFICATIONS 5', and 'HELP'. The main navigation menu has 'Home', 'Invoices', 'Orders', 'Profile' (highlighted with a '1'), '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 is titled 'Worley Limited' and features a dropdown menu with 'Worley Limited' selected, marked with a '2'. Below this is the 'Supplier Profile Form v25' with the OneSource logo and the text 'Form 2: Supplier Profile Form'. A status box shows 'Applied' with a '3'. The 'Supplier Information' section lists 'Nikki Consulting Services'. At the bottom, there are buttons for 'Decline', 'Save', and 'Submit for Approval' (highlighted with a '5'). A '4' is placed above the 'Update Info' button.

Coupa Supplier Portal | Manage Profile



Will my information be shared with other companies on the Coupa portal?

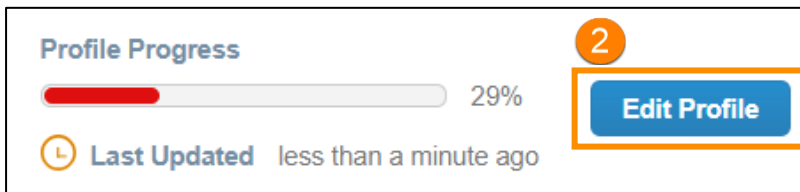
You have the option to make your Profile public so that other companies can reach out to you to join their vendor database. Only limited information will be made available.

Coupa Supplier Portal | Manage Profile

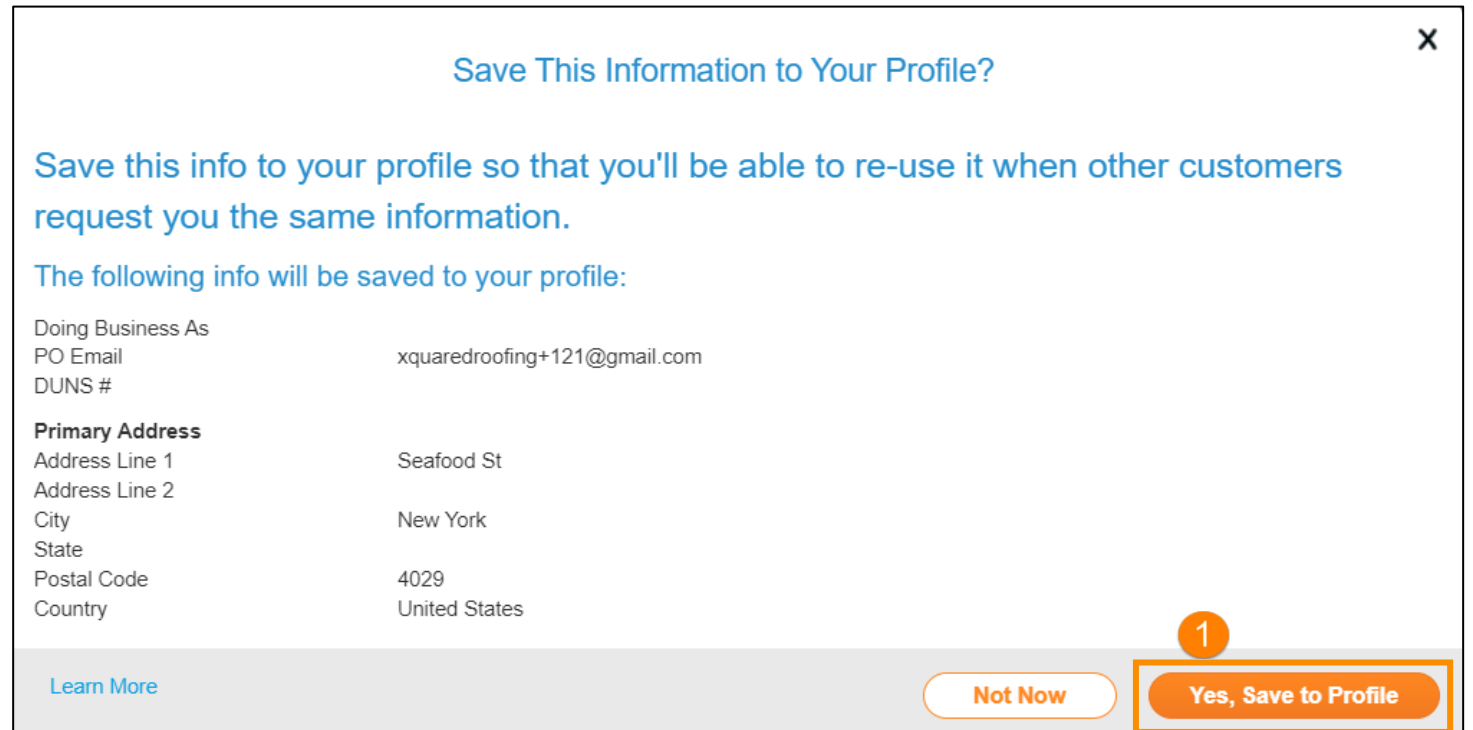
D. Copy to Public Profile

After the update of the New vendor Info, Supplier will be prompted with an option to copy the SIM profile to a Public Profile

1. Click **Yes, Save to Profile.**
2. You can also go directly to the Profile tab and click **Edit Profile** to update the public information.



Profile Progress 29%
Last Updated less than a minute ago
Edit Profile



Save This Information to Your Profile?

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

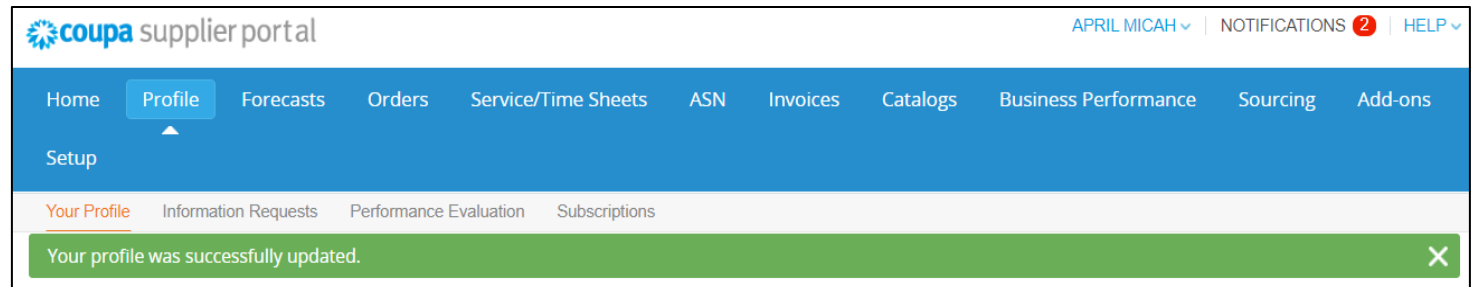
The following info will be saved to your profile:

Doing Business As	
PO Email	xquaredroofing+121@gmail.com
DUNS #	
Primary Address	
Address Line 1	Seafood St
Address Line 2	
City	New York
State	
Postal Code	4029
Country	United States

Learn More

Not Now

Yes, Save to Profile



coupa supplier portal

APRIL MICAH | NOTIFICATIONS 2 | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

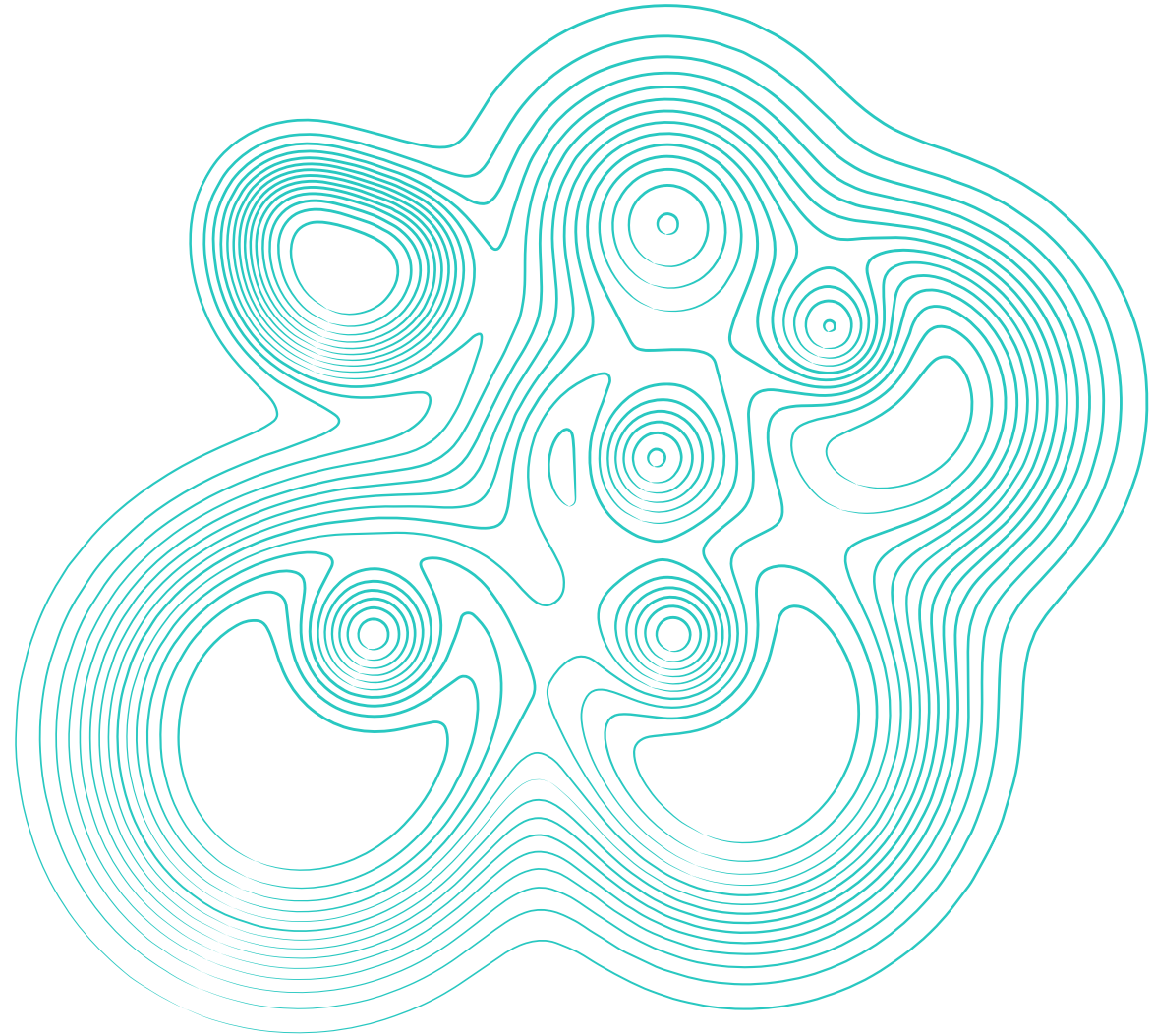
Setup

Your Profile Information Requests Performance Evaluation Subscriptions

Your profile was successfully updated.

COUPA SUPPLIER PORTAL (CSP)

3. Homepage



Coupa Supplier Portal | Homepage

Coupa Homepage – Profile Summary

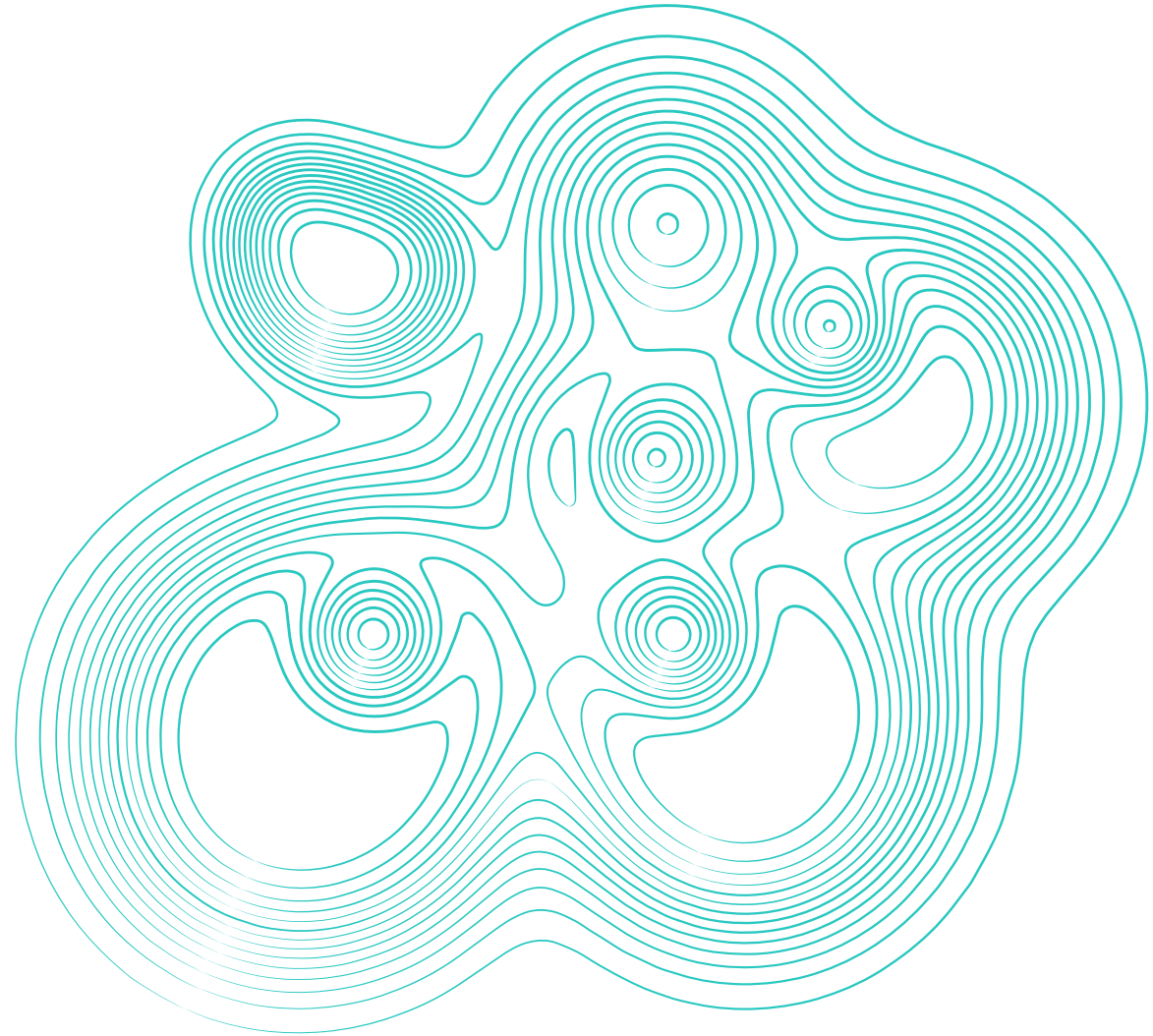
In the Coupa Supplier Portal Homepage, the following details are displayed:

- **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 may have more than one account/profile in the portal. This can happen when several users from the same company register or are invited to the Coupa Supplier Portal through different email addresses.
- **Linked Customers** – Displays the count of your linked customers in the portal.

The screenshot shows the Coupa Supplier Portal homepage for a user named Worley. The page features a blue navigation bar with the following menu items: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. The user's name, APRIL MICAH, and a notification icon with a red circle containing the number 0 are visible in the top right corner. The main content area includes a green banner with the text "Verify Your Account And Get Noticed" and a "Get Verified" button. Below this is a profile card for "XQuared Roofing Materials" with a "Get Verified" button and a progress indicator showing 6% profile progress. The "Recent Activity" section shows no activity for Worley. The "Announcements" section shows no announcements. At the bottom, there are four summary cards: "Two Factor Security" (0 of 1 Users), "Join Requests" (0 Users), "Merge Suggestions" (0 Duplicates), and "Linked Customers" (1 Connection).

COUPA SUPPLIER PORTAL
(CSP)

4. Manage Account Settings



Coupa Supplier Portal | Notification Preference

- The Supplier will receive a notification in Coupa Supplier Portal based on the Notifications preferences setup.
- The Supplier will be able to select the notifications they want to receive and can select the channel to receive the notification which can be via Online (Coupa Supplier Portal), Email and SMS.

Steps on how to setup notification preferences:

1. Beside your username, click **Notifications** then click **Notification Preferences**.
2. Select the type of notification(s) and the preferred channel(s) on which to receive the notification.

The screenshot displays the 'coupa supplier portal' interface. At the top right, it shows the user 'APRIL MICAH' and a 'NOTIFICATIONS 0' indicator. The navigation menu includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' option is highlighted in the sub-menu. A 'Notification Preferences' button is circled in red with a '1'. Below this, there is a form for entering contact information: 'Email' (xquaredroofing+12@gmail.com), 'Mobile(SMS)' (+1), and a 'Verify' button. A warning message states 'Verify number to receive SMS'. The 'Account Access' section contains a table with notification preferences for 'Request to Join' and 'Merge Request'. The 'Announcements' section has a row for 'New Customer Announcement'. The 'Business Performance' section has a row for 'Business Performance Role Granted'. A red circle '2' highlights the 'Email' checkbox for 'Request to Join'.

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 & Two-Factor Authentication

When the Supplier logs in for the first time, they are prompted to enable two-factor authentication.

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

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

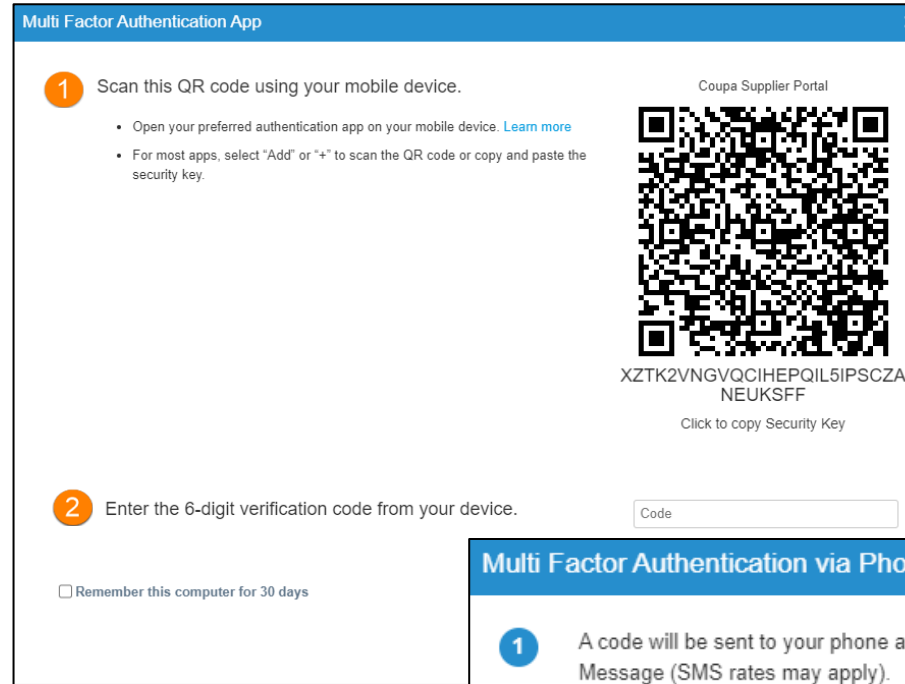
1. Hover your mouse on your username and click **Account Settings**.
2. Click **Security & Multi Factor Authentication**.

The screenshot displays the Coupa Supplier Portal interface. At the top right, the user's name 'APRIL MICAH' is shown with a dropdown arrow, next to 'NOTIFICATIONS 0' and 'HELP'. A dropdown menu is open under the user name, with 'Account Settings' highlighted and marked with a red circle '1'. Below this, 'Notification Preferences' and 'Log Out' are visible. The main navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', and 'Catalog'. A secondary bar contains 'Setup'. The main content area is titled 'My Account Security & Multi Factor Authentication'. On the left, a sidebar menu has 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication' (the last one is highlighted with a red circle '2'). The main content area shows 'Multi Factor Authentication' options: 'Disabled', 'For Payment Changes (Required for changing Legal Entity or Remit-To)' (selected), and 'For Both Account Access (Login) and Payment Changes'. Below these are two sections: 'Via Authenticator App' with a 'Default' radio button, and 'Via Text Message' with a 'Default' radio button.

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.




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

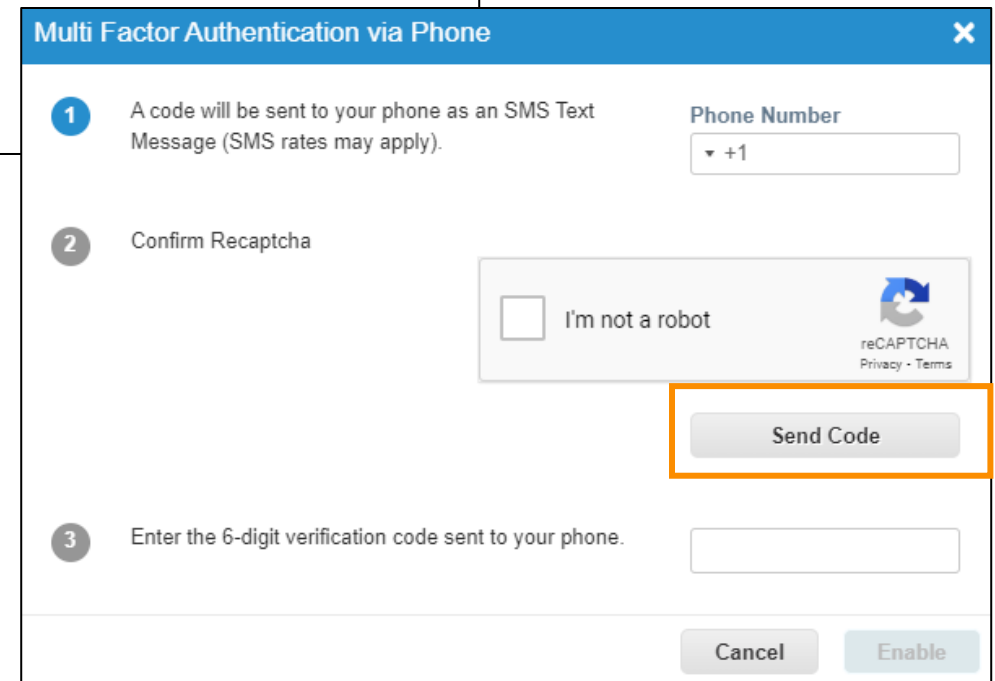
Click to copy Security Key

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

Remember this computer for 30 days

If Via Text Message

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




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
▼ +1

2 Confirm Recaptcha

I'm not a robot



reCAPTCHA
Privacy - Terms

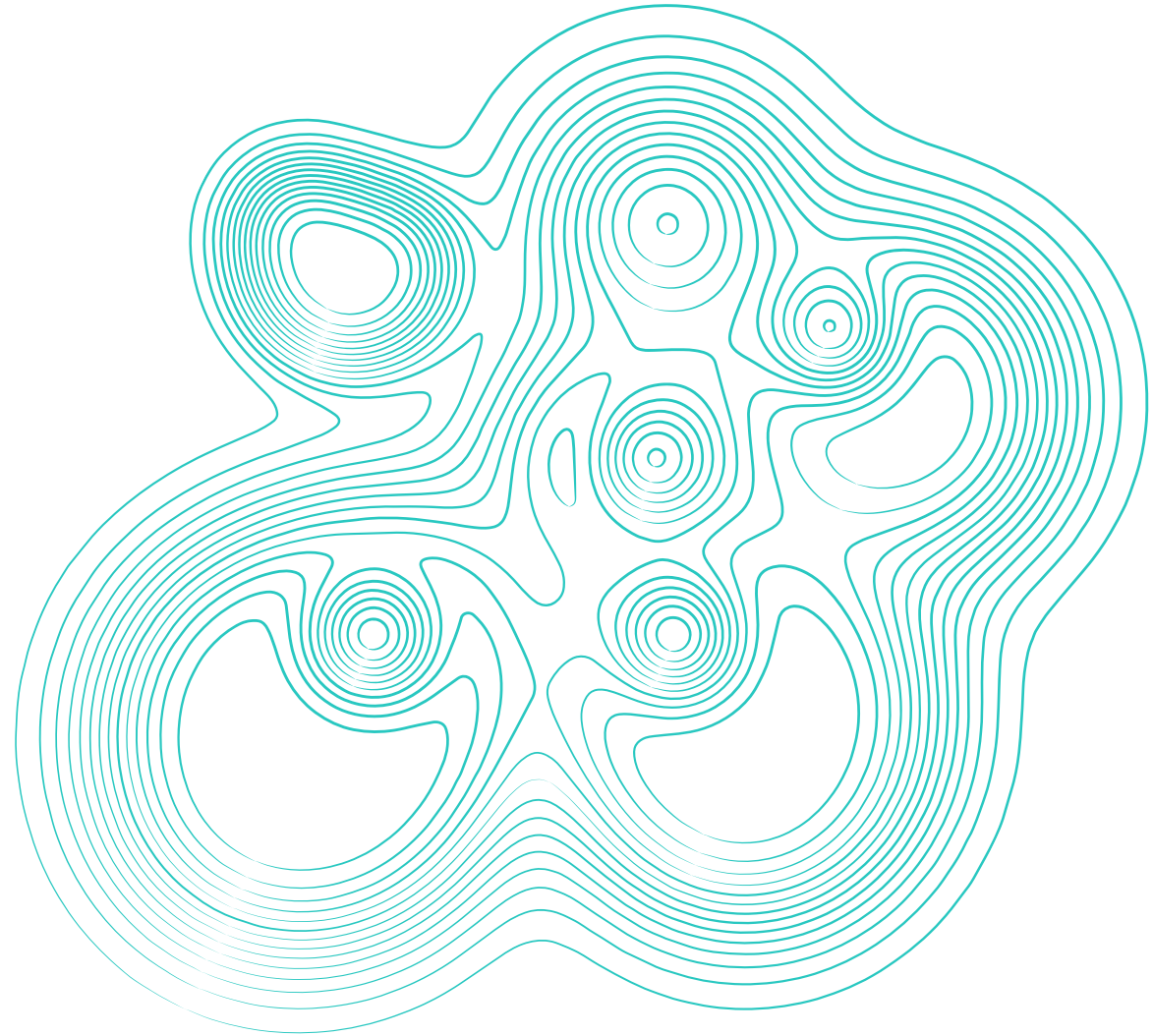
Send Code

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

Cancel Enable

COUPA SUPPLIER PORTAL
(CSP)

5. Admin Setup



Coupa Supplier Portal | Admin Setup

Go 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. Go 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 displays the Coupa Supplier Portal interface. At the top, the header includes the logo, 'coupa supplier portal', and user information: 'APRIL MICAH' with a dropdown arrow, 'NOTIFICATIONS' with a red badge containing the number '2', and 'HELP' with a dropdown arrow. A navigation bar below the header contains links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. A 'Setup' button with a red badge containing the number '1' is highlighted. Below the navigation bar, the 'Admin' section is active, showing 'Admin Users' and a 'Users' sub-section. The 'Invite User' button is highlighted with a red box and a red badge containing the number '2'. The 'Invite User' modal form is open, showing fields for 'First Name' (with a red badge '3'), 'Last Name', and 'Email' (with a red asterisk). Below the form, there are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has a red badge '4' and includes checkboxes for 'All', 'Admin', 'Orders', 'Restricted Access to Orders' (with a radio button for 'All'), 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets' (with a radio button for 'All'), 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The 'Customers' section includes checkboxes for 'All', 'Worley Limited - XQuared Roofing Materials v6', and 'Worley Limited - XQuared Roofing Materials v4'. At the bottom of the modal, there are 'Cancel' and 'Send Invitation' buttons, with the latter highlighted by a red box and a red badge '5'.

Coupa Supplier Portal | Admin Setup

B. Merge Requests

This is used for companies with multiple accounts to reduce confusion for existing and potential customers.

To Merge:

1. Go 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 shows the 'Admin Merge Requests' page in the Coupa Supplier Portal. The page has a navigation bar with 'Setup' (1) and 'Admin' (2) tabs. The 'Initiate Merge Request' form contains an email field (3) with 'coupa@coupamail.edu', a reCAPTCHA 'I'm not a robot' checkbox, and a 'Request Merge' button (3). A warning message states: 'Merging will join the accounts information to linked customers email address belongs to a user who is not you. Learn more about merging'. A 'Request Account Merge' popup is open, showing 'My Account' (4) and 'Their Account' options. The 'Merged Account' section lists 'All combined users', 'All combined customers', and 'All combined payment information'. At the bottom, there is a 'Note For Recipient' field (5), another reCAPTCHA 'I'm not a robot' checkbox, and a 'Send Request' button (6). A warning message at the bottom states: '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. Before sending a merge request, confirm that this 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.'

B.1 Respond to Merge Account Request

1. From **Admin** page, select **Merge Requests**
2. Navigate to Open Merge Requests and Click **Respond**
3. On the opening popup window, **Accept** or **Reject** the request.

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

When you select either your account or the other account to be the account owner, the Coupa Supplier Portal shows you a visual representation of who controls what data after the merge.

Account merges cannot be undone. Use caution when merging accounts and be sure to verify that the account you are merging with is part of 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** **3** Accept

Coupa Supplier Portal | Admin Setup

C. Legal Entity

A legal entity is a representation of your company and gives your Coupa customers the information they need to do business with you, including addresses, payment methods, and remit-to details.

C.1 Add Legal Entity

1. Go to **Setup** > **Admin** > **Legal Entity Setup**
2. Click on **Add Legal Entity** in the top right corner.
3. Enter the official name of your business that is registered with the local government and select the country/region where it is located and select **Continue**.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Setup' highlighted by a red circle '1'. Below it, the 'Admin' section is active, and 'Legal Entity Setup' is the current page. In the top right corner, there's a button labeled 'Add Legal Entity' highlighted with a red circle '2'.

The dialog box is titled 'Where's your business located?'. It contains a text area with the following text: 'Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.' Below this, there are two input fields: '* Legal Entity Name' and '* Country/Region'. To the right of these fields is a text box that says: 'This is the official name of your business that is registered with the local government and the country/region where it is located.' At the bottom right, there are two buttons: 'Cancel' and 'Continue', with 'Continue' highlighted by a red circle '3'.

Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

4. On the Tell your customers about your organization page, complete the fields.
5. Select **Save & Continue**.

Tell your customers about your organization

Which customers do you want to see this?

All
 Worley

What address do you invoice from?

* Address Line 1 +
* City
State
* Postal Code

Country/Region

Use this address for Remit-To *i*
 Use this for Ship From address *i* **4**

REQUIRED FOR INVOICING
Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

What is your Tax ID? *i*

Country/Region
Tax ID
 I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code *i*
Preferred Language

5

Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

6. On the **Where do you want to receive payment?** page, select how you'd like to be paid in the **Payment Type** selector

Address - You receive physical checks/cheques at the address listed. If you selected

Bank Account - You receive payment via deposit into your bank account. If you select this option, the bank account sections and fields appear. The available bank account fields and field names depend on the selected country. Banking information is required for compliant invoicing in some countries when indicated. Otherwise, banking information is not required and remains private.

Virtual Card - You receive payment via a virtual card sent to you through an encrypted email.

7. Select **Save & Continue**.

Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

- The following screen summarizes your remit-to account details. You can select Add Remit-To to add an additional remit-to address or you can select Manage next to an existing remit-to to edit it. Once you are finished making changes, select **Next**.
- On the **Where do you ship goods from?** page, add your ship-from address, remit-to integration code, contact information, and the Coupa customers who can use this remit-to account. Click **Done**.

Where do you want to receive payment?

1 2 3 4

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

Remit-To Account	Remit-To Address	Status	
Address	Sarnia Rd Toronto 4027 United States	Active	Manage

Deactivate Legal Entity Cancel Next

Where do you ship goods from?

1 2 3 4

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

Title	Status	
Sarnia Rd Toronto 4027 United States	Active	Manage

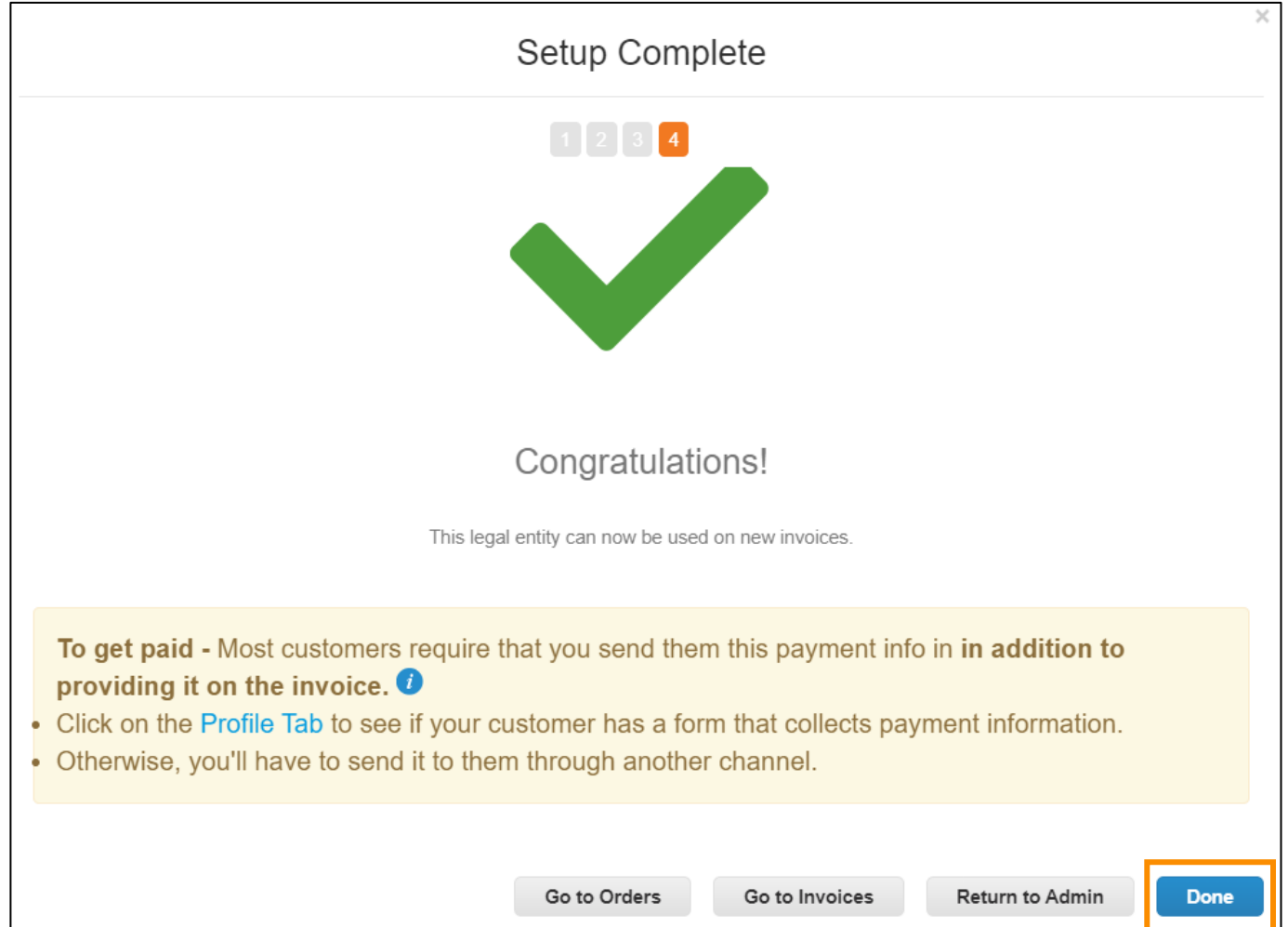
Deactivate Legal Entity Done

Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)


10. The Setup Complete page confirms that your legal entity setup is complete and that you can use it on invoices.

Select whether you'd like to go to Orders, Invoices, or Return to Admin or select Done to return to the Legal Entities page.



Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** [i](#)

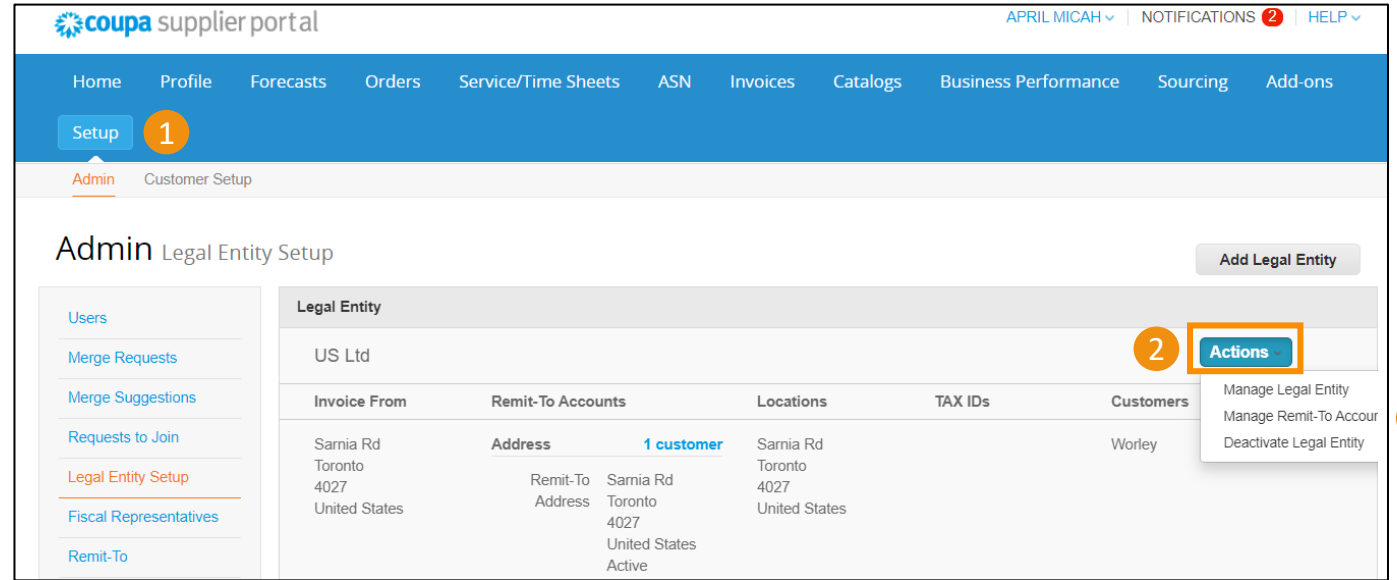
- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Go to Orders Go to Invoices Return to Admin **Done**

Coupa Supplier Portal | Admin Setup

C.2 Modify Legal Entities

1. Go to **Setup > Admin > Legal Entity Setup**.
2. Next to the legal entity you want to modify, select **Actions**.
3. You can select **Manage Legal Entity**, **Manage Remit-To Accounts**, and **Deactivate Legal Entity**.



Option	Description
Manage Legal Entity	Opens the legal entity setup flow described in the Add a legal entity in the previous slide. You can manage your addresses, but other information is not editable. Create a new legal entity if you need to modify more information.
Manage Remit-To Accounts	Opens the Add a new Remit-To account window where you can manage existing remit-to accounts or add new remit-to accounts. For more information, see View and Manage Remit-to Information. You can also manage your remit-to information from the Setup > Admin > Remit-To page.
Deactivate Legal Entity	Deactivates the legal entity so that it can't be used by you or your Coupa customer. This action can't be undone. Check with your customer first to ensure that you don't have any interruption in e-invoicing.

Coupa Supplier Portal | Admin Setup

D. Fiscal Representatives

Add fiscal representatives that you need if you have operations in a country/region where you are not registered legally but you need to be represented for tax purposes.

D.1 Add a Fiscal Representative

1. Go to **Setup > Admin > Fiscal Representatives**.
2. Select **Add Fiscal Representative**.
3. In the appearing window, 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 shows the Coupa Supplier Portal interface. At the top, the user is identified as APRIL MICAH, with a notification bell icon showing 2 notifications and a HELP dropdown. The main navigation bar includes Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. Below this, there are tabs for Sourcing, Add-ons, and Setup. The Setup tab is active, and a sub-tab for Admin is selected, with a 'Customer Setup' link and a circled '1' next to it. The main content area is titled 'Admin Fiscal Representatives' and features a table with columns for Name, Country/Region, Tax ID, and Associated Tax Registrations. A circled '2' highlights an 'Add Fiscal Representative' button. A modal window titled 'Fiscal Representatives' is open, showing a form with 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). A circled '3' highlights the City field. At the bottom of the modal, there are 'Cancel' and 'Continue' buttons, with a circled '4' highlighting the 'Continue' button.

Coupa Supplier Portal | Admin Setup

D.2 Edit or Deactivate a Fiscal Representative

1. Go 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. At the top, the user is identified as APRIL MICAH with a notifications bell icon showing 2 notifications and a help icon. The main navigation bar includes Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. Below this, there are tabs for Sourcing, Add-ons, and Setup. The Setup tab is active, and a sub-tab for Admin is selected, indicated by a circled '1'. The page title is 'Admin Fiscal Representatives' with an 'Add Fiscal Representative' button on the right. A table lists fiscal representatives with columns for Name, Country/Region, Tax ID, and Associated Tax Registrations. One entry is shown for 'United States' with Tax ID '124'. A 'Manage' button next to this entry is highlighted with a circled '2'. At the bottom of the page, there are three buttons: 'Deactivate' (highlighted with a circled '3'), 'Cancel', and 'Continue'.

Name	Country/Region	Tax ID	Associated Tax Registrations
	United States	124	

Coupa Supplier Portal | Admin Setup

E. Remit To

Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information.

Note: This can also be added when filling out Information Requests from Worley.

E.1 Add a Remit-to

1. Go to **Setup > Admin > Remit-To**.
2. Select **Add Remit-To**.
3. In the Add Remit-To window that appears, select the legal entity you want your remit-to associated with. If only one legal entity is active, it is selected by default, and you cannot change it.

coupa supplier portal

APRIL MICAH | NOTIFICATIONS 2 | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup 1

Admin Customer Setup

Admin Remit-To

2

Add Remit-To

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	Samia Rd Toronto 4027 United States Preferred Language: English (US)	Address	US Ltd	✓ Worley	

Add Remit-To

3

Legal Entity US Ltd

Invoice From Address Samia Rd
Toronto, 4027
United States

Back Next

Coupa Supplier Portal | Admin Setup

E.1 Add a Remit-to (CONTINUED)

4. On the **Add a new Remit-To** account page, complete the fields.
5. Select **Save & Continue**. The CSP displays the remit-to page you see during legal entity setup.

Add a new Remit-To account

* Payment Type 4

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

Bank Account Country/Region:

E.2 Deactivate a Remit-to

1. Go to **Setup > Admin > Remit-To**.
2. In the Actions column, select **Disable**.

Admin Remit-To

[Add Remit-To](#)

Users	Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
Merge Requests Merge Suggestions Requests to Join Legal Entity Setup	None	Samia Rd Toronto 4027 United States Preferred Language: English (US)	Address	US Ltd	✓Worley	

Coupa Supplier Portal | Admin Setup

E.3 Share a Remit-to with a Customer

1. Go to **Setup > Admin > Remit-To**.
2. In the Actions column, select **Share**.
3. On the Edit Remit-To Usage page that appears, select the customers you want to share the remit-to with from the Add Additional Customers dropdown list.

Admin Remit-To

[Add Remit-To](#)

Users	Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
Users Merge Requests Merge Suggestions Requests to Join Legal Entity Setup	None	Samia Rd Toronto 4027 United States Preferred Language: English (US)	Address	US Ltd	Worley	

Edit Remit-To Usage

Legal Entity US Ltd
Remit-To Samia Rd, Toronto, 4027, United States
Samia Rd
Toronto, 4027
United States

Which customers can use this account?

Add Additional Customers **Add Selected**

Denotes customers using Coupa Pay. Remit-to Account details will be shared with the customer when they have been successfully validated if the customer has chosen to send payments for those account types through Coupa Pay.

Customer	Status	Date added	
Worley	Active and Validated	06/20/24	

[Back](#) [Next](#)

Coupa Supplier Portal | Admin Setup

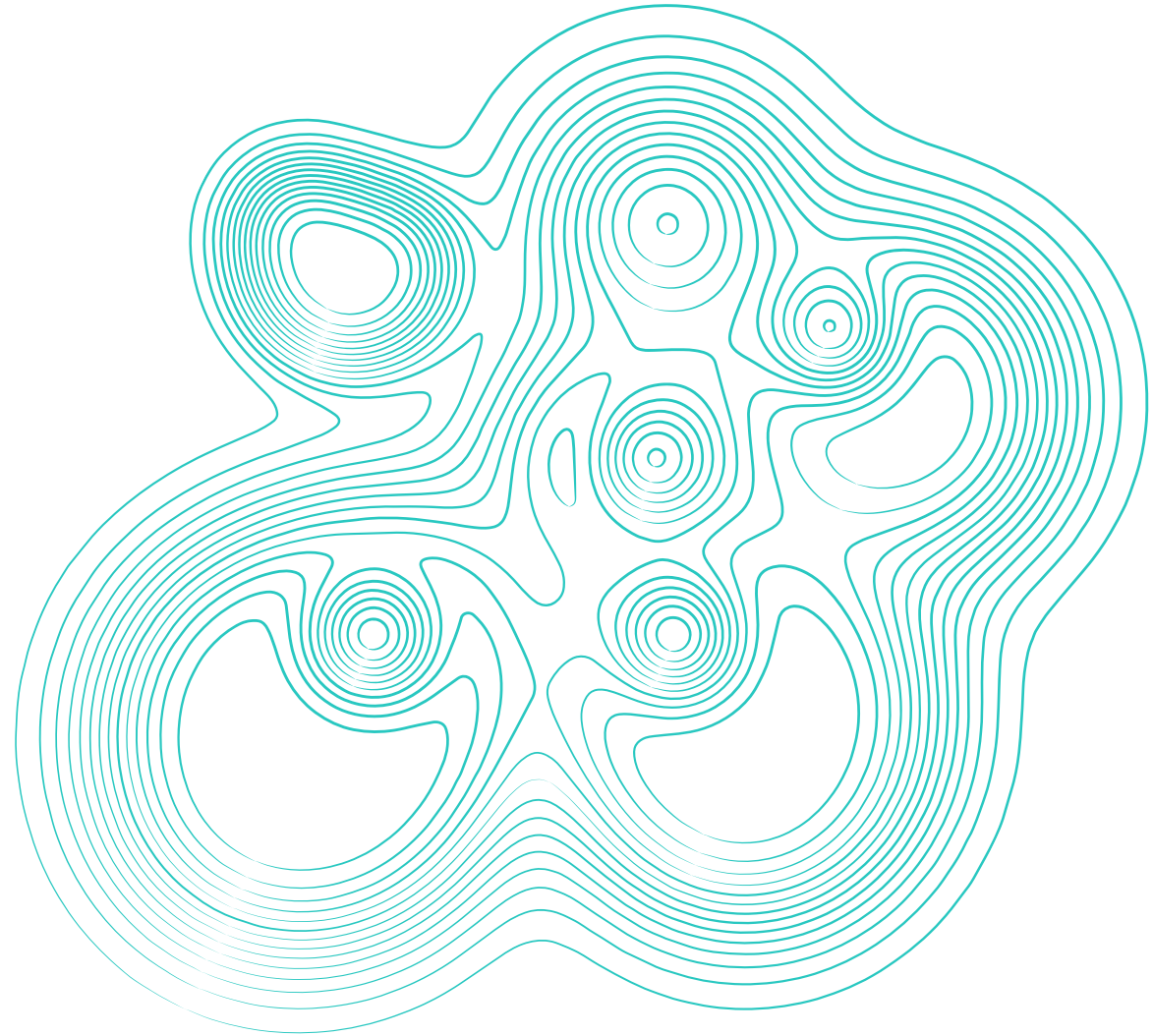
E.4 Add Remit-to Addresses to SIM Request

Customer might request you to add a remit-to address to the SIM Requests. You can create a new remit-to address or choose an existing one from the legal entities.

1. Go 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. If the Information Request includes Remit-To Addresses, select **Add Remit-To** to add a new or an existing remit-to address. You can add one or more remit-to addresses.
4. 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.

COUPA RISK ASSESS (CRA)

1. Introduction (CRA Evaluation Invitations)



New to Coupa | Coupa Risk Assess (CRA) 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, in order 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.couphost.com/External/_si7314?xS=bjX0Q4AV69TBIWSJOMfUrGe%2FyKaSsfRLwOIJRheXbLLFYz1r%2FZC4zxUz7LFnGovjHpBm2pHUyraiNVRXOF6VzslqFwqHt9BLoAEm6mFtnjODRe1BvjjWSQeky5g%2B0tiQykiWsvAkb5CBRS%2FhQZS%2F%2BR0pSLvCM3u53MPw4%2Frvt%2FhNS8ua1Q7u4mUipYE4nmSGNVXBFqMa4%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) 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

coupa

Select and answer your security question

Security Question * Mother's maiden name? ▾

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

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) CRA Evaluation Invitations

- Once logged in, select Show Me All (located under the blue Evaluation 8), you will then see the evaluations required for completion.
- When ready to start – select View (hint: you can start now and save and return later)

Action Items
Personal

Evaluations:

You Have

8

[Show Me All](#)

0 Late [Show Me](#)

0 Due This Week [Show Me](#)

8 Due Later [Show Me](#)

[View Closed Evaluations](#)

Approvals:

You Have

0

[Show Me All](#)

0 Late [Show Me](#)

0 Action Required [Show Me](#)

0 Waiting [Show Me](#)

[View Closed Approvals](#)

Action Plans:

You Have

0

[Show Me All](#)

0 Not Started [Show Me](#)

0 In Process [Show Me](#)

0 Awaiting Approval [Show Me](#)

[View Closed Action Plans](#)

Evaluations: All

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Financial Viability Control	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/6/2024	A	View
Social	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/6/2024	A	View
Health, Safety and Environment	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/6/2024	A	View
Operational Delivery Capabilities	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Not Started	11/6/2024	A	View

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

7. Once you have started the evaluations:
 - a. Required questions are noted with a *
 - b. Some answers will trigger conditional questions to appear as needed
 - c. There are some questions that have areas to load attachments (some are required)
 - a. 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!

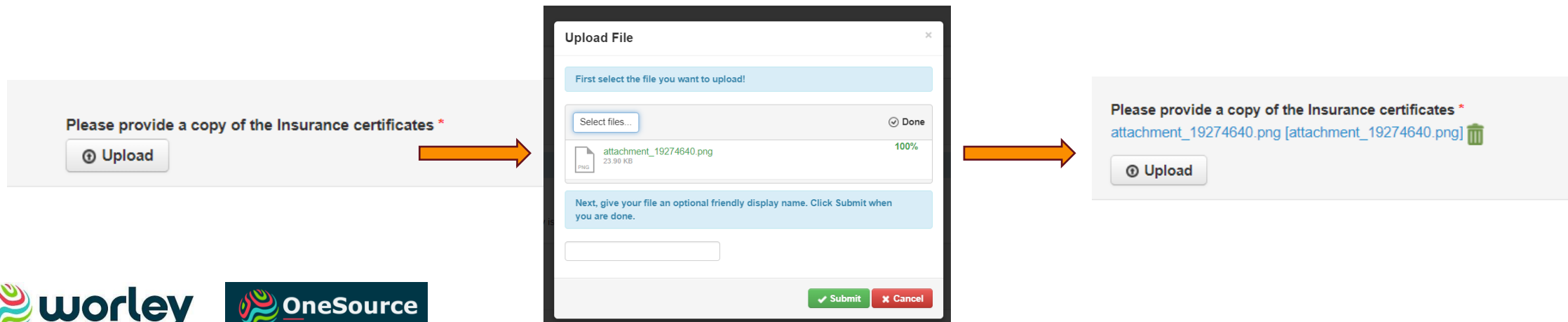
Select files... Done

 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) CRA Evaluation Invitations

8. Once you are complete select SAVE & SUBMIT
9. For each evaluation submission you will be required to accept to confirm all information entered is valid.
10. CRA will validate (be patient) if you leave this validation page too early, it will 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)

The screenshot displays the Coupa CRA interface with the following elements:

- Financial Viability Control: Market Presence** section:

Item #	Description	Score	Actions
2.000	In which regions/countries does your company operate?		
Please input: *			
2.010	What are your key markets?		
Please input: *			
- Financial Viability Control: Payment Terms** section:

Item #	Description	Score	Actions
3.000	Does your Company of		
Please input: *			
- Authorization Required** dialog (9):

I certify that all information that I have provided is valid.
- Authorization Required** dialog (10):

Your evaluation is being validated. Please do not leave this page until the submittal process is complete.
- Evaluation is incomplete!** error message (11):
 - The following line(s) are missing a score: 1.020
 - Components require a response on line(s).

Below the error message, a list of item numbers is shown: 0.3, 0.000, 4.000, 4.010, 4.020, 4.030, 4.040, 4.050, 4.060, 4.070, 14.010, 14.020, 14.030, 14.040, 14.050, 15.000, 16.000, 16.010, 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** section:

Item #	Description	Score	Actions
0.000	Overview and Instructions		

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

12. Once you have started an evaluation, if you save and exit, your evaluation will change to **In Progress**
13. Once you have successfully submitted the evaluation, it will no longer appear on the home page, but will still be available to review under **Closed Evaluations**

Action Items Personal

Evaluations:

You Have **7** Show Me All

- 0 Late [Show Me](#)
- 0 Due This Week [Show Me](#)
- 7 Due Later [Show Me](#)

[View Closed Evaluations](#)

Approvals:

You Have **0** Show Me All

- 0 Late [Show Me](#)
- 0 Action Required [Show Me](#)
- 0 Waiting [Show Me](#)

[View Closed Approvals](#)

Action Plans:

You Have **0** Show Me All

- 0 Not Started [Show Me](#)
- 0 In Process [Show Me](#)
- 0 Awaiting Approval [Show Me](#)

[View Closed Action Plans](#)

Evaluations: All

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Financial Viability Control	One Time	10/27/2024		In Progress	11/6/2024		View

12

Action Items Personal

Evaluations:

You Have **7** Show Me All

- 0 Late [Show Me](#)
- 0 Due This Week [Show Me](#)
- 7 Due Later [Show Me](#)

[View Closed Evaluations](#)

Approvals:

You Have **0** Show Me All

- 0 Late [Show Me](#)
- 0 Action Required [Show Me](#)
- 0 Waiting [Show Me](#)

[View Closed Approvals](#)

Action Plans:

You Have **0** Show Me All

- 0 Not Started [Show Me](#)
- 0 In Process [Show Me](#)
- 0 Awaiting Approval [Show Me](#)

[View Closed Action Plans](#)

Evaluations: Closed

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Social	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	Completed	11/6/2024		View

13

1 - 1 of 1 items

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

If someone else in your company should be completing any/all of these evaluations, you can delegate them:

14. Select **View**

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

The screenshot shows the Coupa CRA Evaluation Invitations interface. At the top, there are three summary cards: 'Evaluations: You Have 7', 'Approvals: You Have 0', and 'Action Plans: You Have 0'. Below these is a table of evaluations. The first row is highlighted, and an orange arrow points to the 'View' button in the 'Action' column. Below the table is the 'Evaluation' details page for 'Risk-Financial Viability Control [CRA UAT SUPPLIER - Nikki] - Onetime'. An orange arrow points to the 'Delegate' button. Below the evaluation details is a table of items. The first item is '0.000 Overview and Instructions'. Below this is a 'Program Version' dropdown set to 'v3'. The second item is '1.000 How many years has your company been in operation?'. Below this is a 'Please input:' field. At the bottom right, a 'Confirm Action' dialog box is open, asking 'This action will take you away from the evaluation. Any unsaved changes will be lost. Do you want to continue?'. An orange arrow points to the 'Confirm' button.

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Financial Viability Control	One Time	10/27/2024	CRA UAT SUPPLIER - Nikki	In Progress	11/6/2024		View

Item #	Description	Score	Actions
0.000	Overview and Instructions		View
Program Version: v3			
Item #	Description	Score	Actions
1.000	How many years has your company been in operation?		View
Please input: *			

New to Coupa | Coupa Risk Assess (CRA) 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

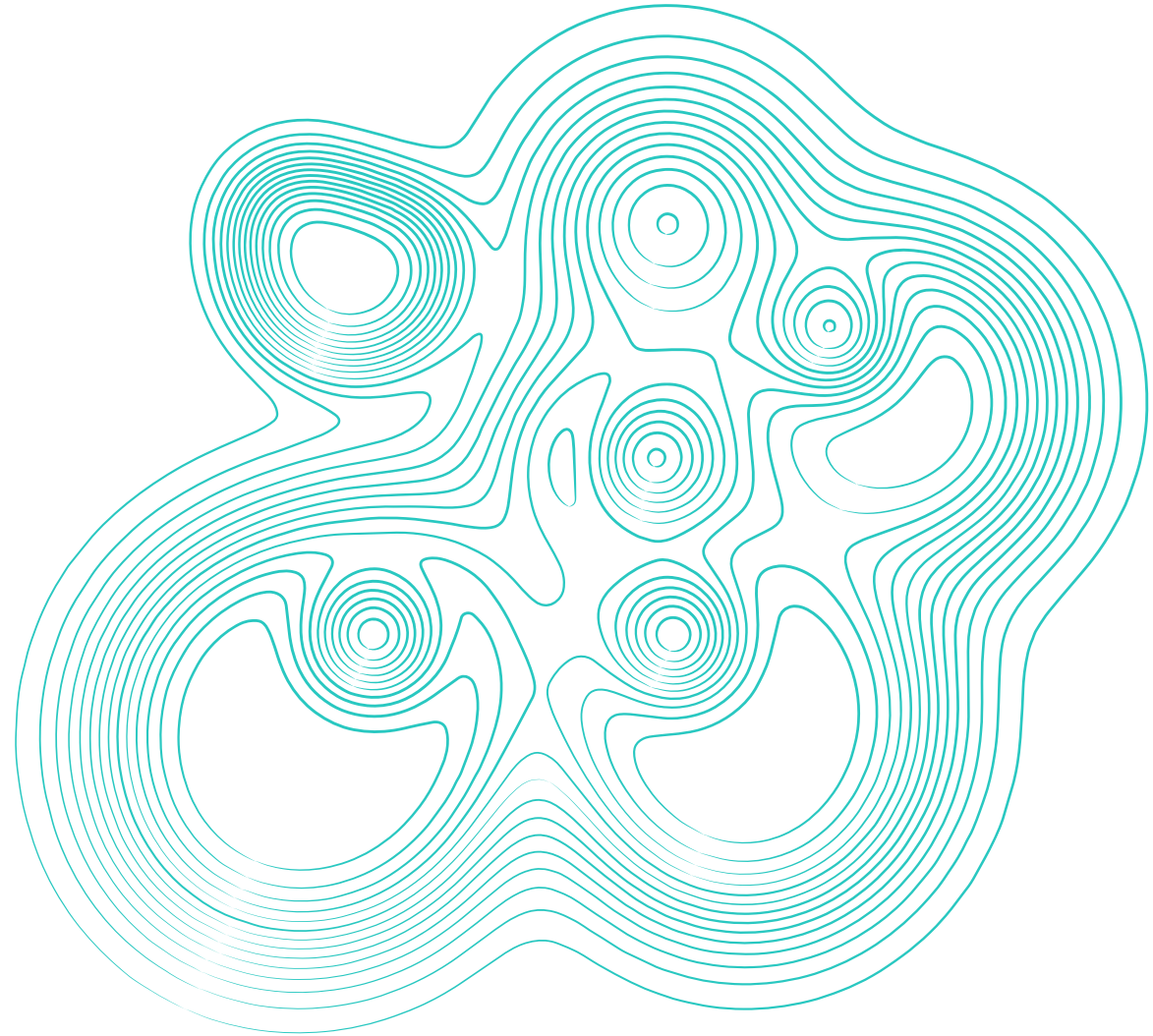
Email Address *

First Name *

Last Name *

COUPA RISK ASSESS (CRA)

2. Account Management



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

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

1

2

General Settings

Update your general account settings.

Username worley.cra.uat+nikki@gmail.com

Company Name Worley Group-Test

Company Timezone America - New York (UTC-04)

Prefix --

Name * Nikki Middle Name or Initial Test Supplier

Title --

Email * worley.cra.uat+nikki@gmail.com

Culture English

Alerts

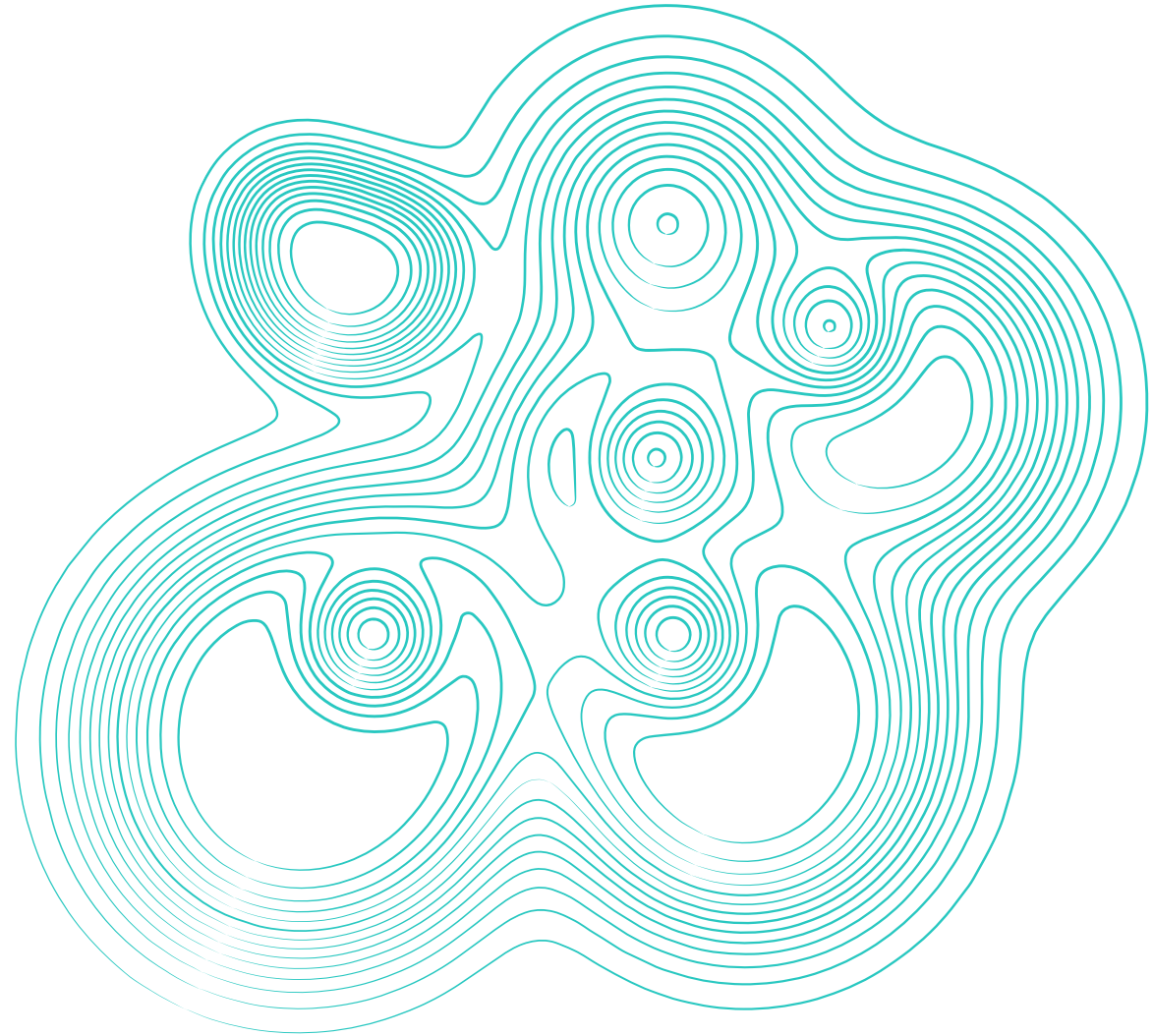
The Alerts grid displays all alerts in grid form. Click the View link to view the details of an alert. To clear alerts, click the checkboxes of the alerts you want to clear then click Clear Selected. To add and/or remove columns, right-click on any column heading, highlight Columns in the popup and check the appropriate column name to add/remove. Show More.

3

Export To Excel	Show Cleared Alerts	Clear Selected Alerts	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 (CRA)

3. Resource Material



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

1. Directly on the home page you will see a resources tab. Once you click on this tab, you will have multiple links to Coupa created resource material

The screenshot shows the 'Resources' page in the Coupa Risk Assess application. The navigation bar includes 'Relationships', 'Programs', 'Reports', and 'Resources' (highlighted). A search bar is present with the text 'Enter Keyword(s)'. The page is titled 'Resources' and contains two main sections:

Forums

Worley Group-Test Forums

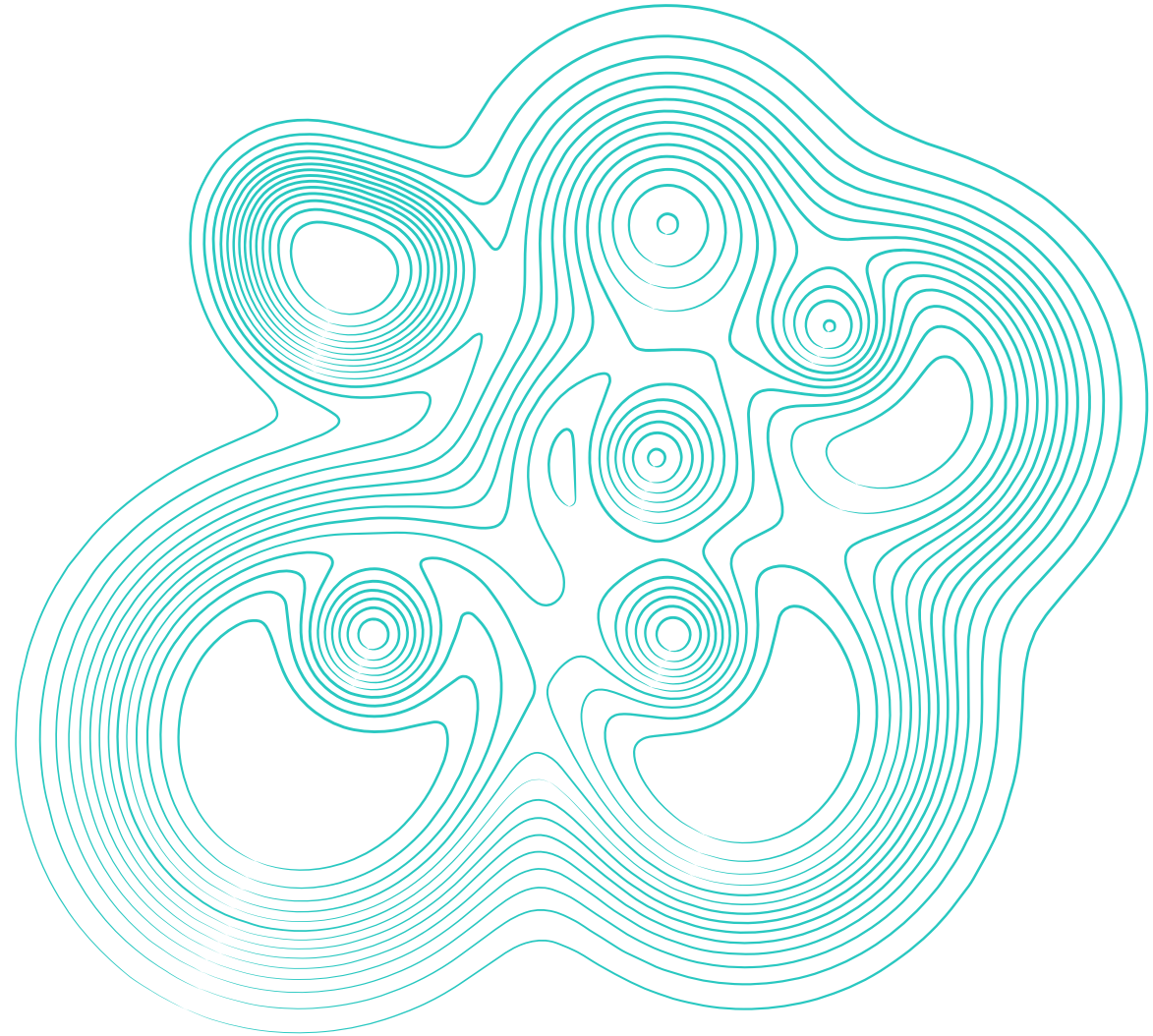
Forum Name	Most Recent Threads	Most Recent Post	Replies	Post
There are no records to display.				

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.

SOURCING RESPONSE PORTAL

1. Responding to Sourcing Events



Responding to Sourcing Events

A supplier is invited to participate in a sourcing event through an email notification sent by Worley Group.

1. Create an account in the Sourcing Response Portal by opening the notification email and click **here** to set up your log in credentials. Note your designated **username** from the email below.

- Input your desired password and click **Change Password**.

Welcome to Coupa!

Please enter your desired password, then reenter it for verification.
Your password must be at least 8 characters.

Password

Password Confirmation

[Change Password](#)

Worley Sourcing Event - BP Master - Full Sourcing Event Template #108 Invitation

XQuared Roofing has been invited by Worley to participate in a sourcing event for **BP Master - Full Sourcing Event 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


You have been given an account on Worley's sourcing system to provide your responses for this Sourcing Event. Before you can login, you need to setup your new password [here](#) 1

Your username is **xquaredroofing+191@gmail.com_4c**

After setting your password, please [login](#) to provide your responses.

IMPORTANT: You must setup your password within 7 days of receiving this message.

Responding to Sourcing Events

- Once password has been saved, log in via your designated username from the sourcing email notification and input your newly created password. 

2. You will now be redirected to the Sourcing Response Portal. Click on the **Event #** 

Welcome to your Sourcing Response Portal!

Supplier has been invited by **Worley** to participate in a sourcing event for **BP Master - Full Sourcing Event 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 (COUPAATTACHMENTS). 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

All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
108	BP Master - Full Sourcing Event Template	06/21/24	08/05/24	Prod	RFP	0



The image shows the login page for the Worley Sourcing Response Portal. At the top left is the Worley logo, a colorful globe. Below it, the word "Worley" is displayed in a bold, black font. Underneath "Worley" is a horizontal line, and to the right of the line is the text "Powered by" followed by the Coupa logo. The main heading is "Sign In". Below this heading are two input fields: "Username or Email Address" and "Password". Below the password field is a link that says "Forgot username or password?". At the bottom right of the form is a "Sign In" button.

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.

Then, Click **Send to Event Owner**.

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

Event Ends **45 : 16**
days hrs

Event Info **3**

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.

3 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.

The screenshot displays a web interface for a sourcing event. It is divided into three main sections:

- Event Information & Bidding Rules:** Contains the text "Event will end at the Event End Time." and two bullet points: "Your responses are viewable by buyer once submitted" and "Buyer may choose to award individual line items".
- Buyer Attachments:** Contains a text block starting with "T" (likely a tab icon) and the text: "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:** Shows a horizontal timeline with two key events:
 - Event Start:** Occurs on Jun 6 at 07:28 PM America/New_York. A duration of 45d : 17h : 0min is shown below it.
 - Event End:** Occurs on Jul 22 at 12:28 PM America/New_York. The time 00:00 is shown below it.

In the bottom right corner of the interface, there is a blue button labeled "Enter Response" which is highlighted with a red border. To its left is a small orange circle containing the number "4".

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

Import from Excel Save Submit Response

Responding to Sourcing Events

c. **Items and Services** - at the bottom page of the My Response tab, review the list of items and/or services for bidding and enter a bid amount in the Price per Unit field. A red asterisk next to the field indicates that an input is 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**.

The screenshot shows the 'Items and Services' page. At the top right, there is a timer for 'Event Ends' showing 45 days and 16 hours. Below this, a blue header bar reads 'Items Not In Lots (2 items)'. The first item is 'Centrifugal Pump' with a price of 500.00 USD. It has a table with columns for 'Expected Quantity' (1 Each), 'Capacity' (1), '* Price per Unit' (500), and '* Currency' (USD). A right-pointing arrow is visible to the right of the table. Below this is the 'IT Services' item with a price of 0.00 USD. It also has a table with '* Price per Unit' and '* Currency' (USD) fields. A right-pointing arrow is also visible to the right of this table.

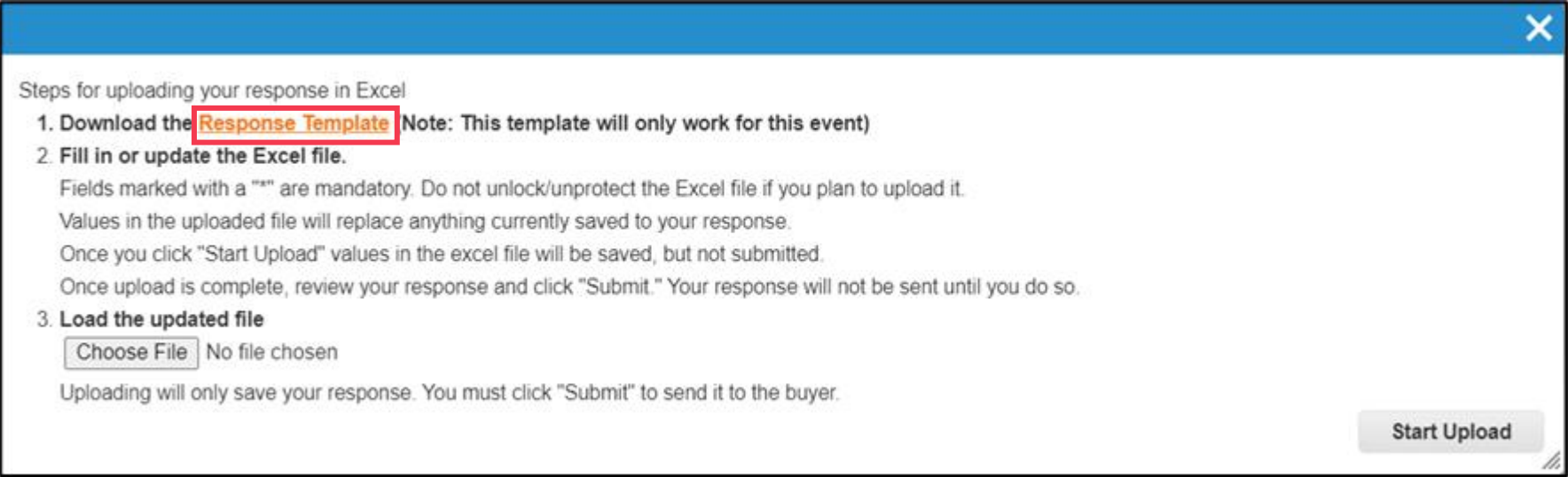
The screenshot shows the expanded view for the 'Centrifugal Pump' item. At the top right, there is a timer for 'Event Ends' showing 45 days and 16 hours. Below this, a blue header bar reads 'Items Not In Lots (2 items)'. The item name 'Centrifugal Pump' is displayed. Below the name, there are four sections: 'Need By Date', 'Ship To Address' (No address selected), 'Details', and 'Request Details' (No Request Details Present). Below these sections, there is a table with columns for 'Capacity' (1), 'Expected Quantity' (1 Each), '* Price per Unit' (500), and '* Currency' (USD). Below the table, there are four input fields: 'Supplier Item Name', 'Item Description', 'ID/Part Number', and 'Lead Time (days)'. At the bottom, there is an 'Attachments' section with the text 'Add File | URL | Text'. At the bottom right, there are two buttons: 'Cancel' and 'Save', with the 'Save' button highlighted by a red border.

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	Cap: 500 USD
IT Services		200 USD

Supplier Response Fields
Capacity (Number)
1

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/fabrication/ship from location outside of the United States?	Radio Buttons	Yes	
	Text Field	Yes	
	Text Field	No	
Bid explicitly states the ARAD and ARO	Radio Buttons	Yes	
Assumptions is clearly stated	Radio Buttons	Yes	
Delivery schedule (in Weeks) ARO	Text Field	Yes	
Bid is valid for 90 days from the date of original offer	Radio Buttons	Yes	
Bid 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	
Company is encountering or foresees any COVID-19 related supply chain / logistics	Radio Buttons	Yes	
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	

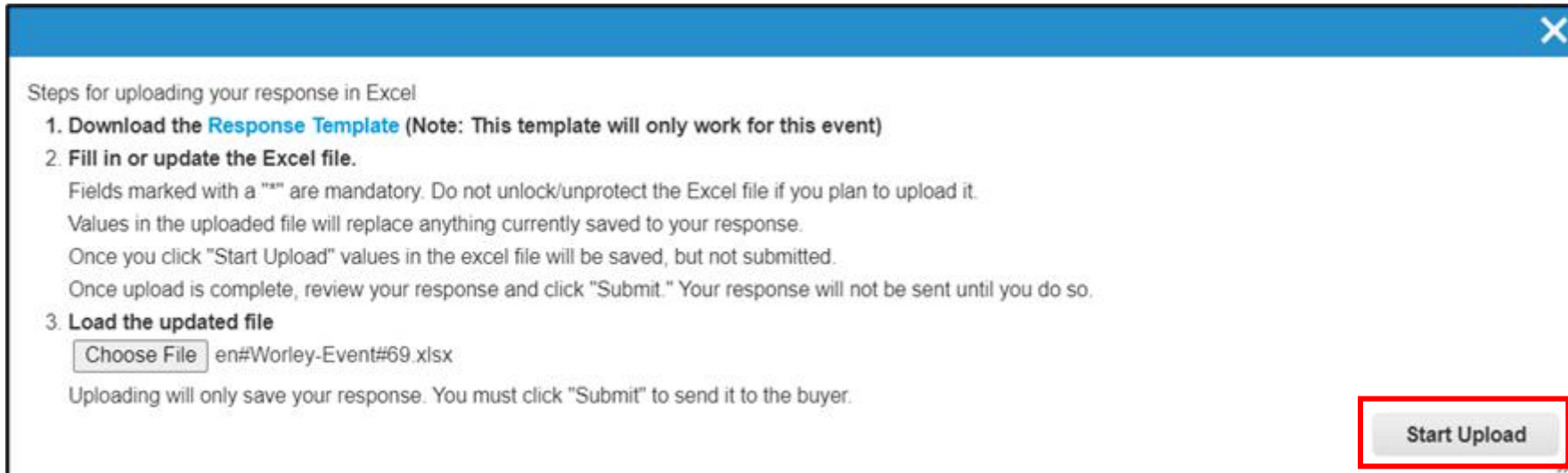
Responding to Sourcing Events

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.



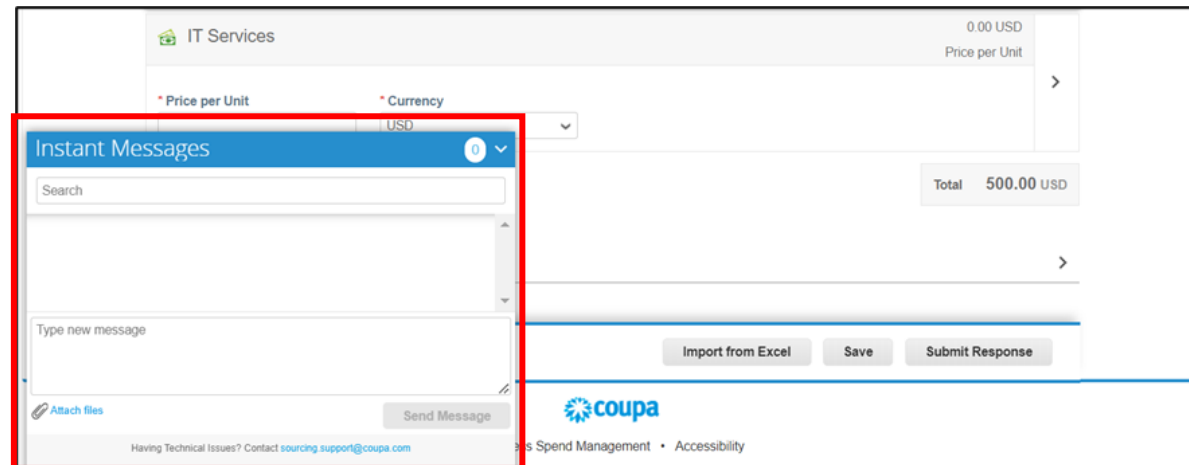
Steps for uploading your response in Excel

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
 en#Worley-Event#69.xlsx
Uploading will only save your response. You must click "Submit" to send it to the buyer.

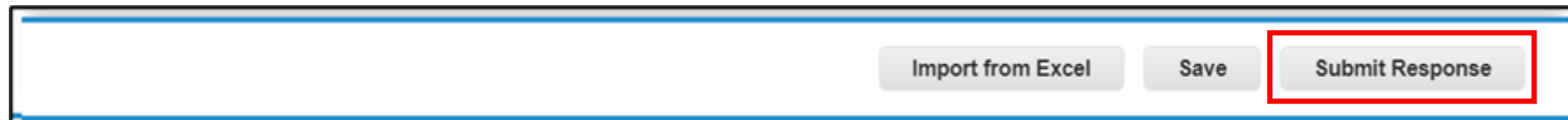
Responding to Sourcing Events

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.

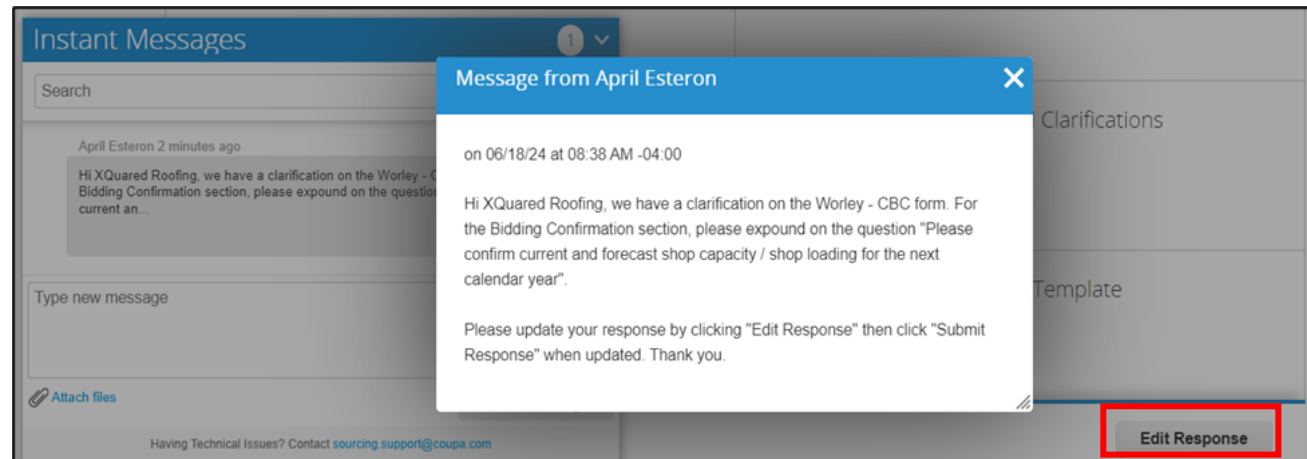


Responding to Sourcing Events

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

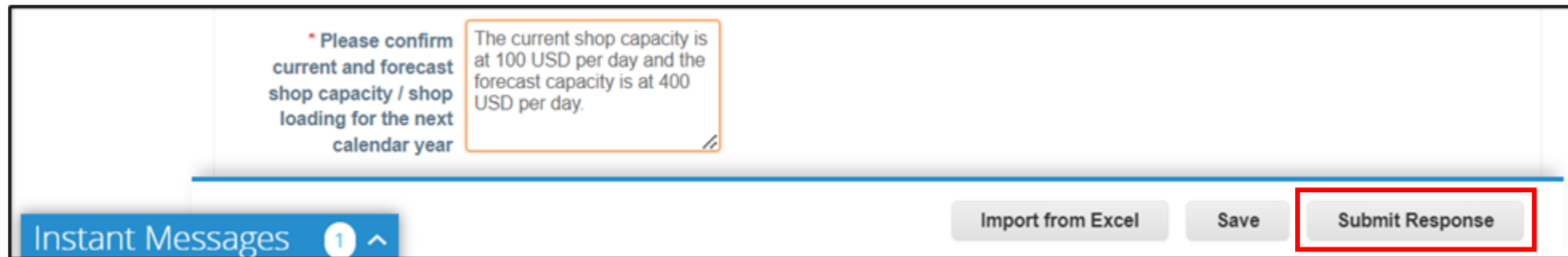
Note: How to reply to the Worley CBC (Commercial Bid Clarification) Form:
Should there be clarifications required on the form, please follow the steps below.

1. **Submit Response** as indicated in step #5 in previous slide (11). 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

4. Upon editing the Worley CBC form, click **Submit Response** again for the Worley buyer to receive it. This will be repeated as needed, should there be any additional clarifications needed from the Worley buyer.



* Please confirm current and forecast shop capacity / shop loading for the next calendar year

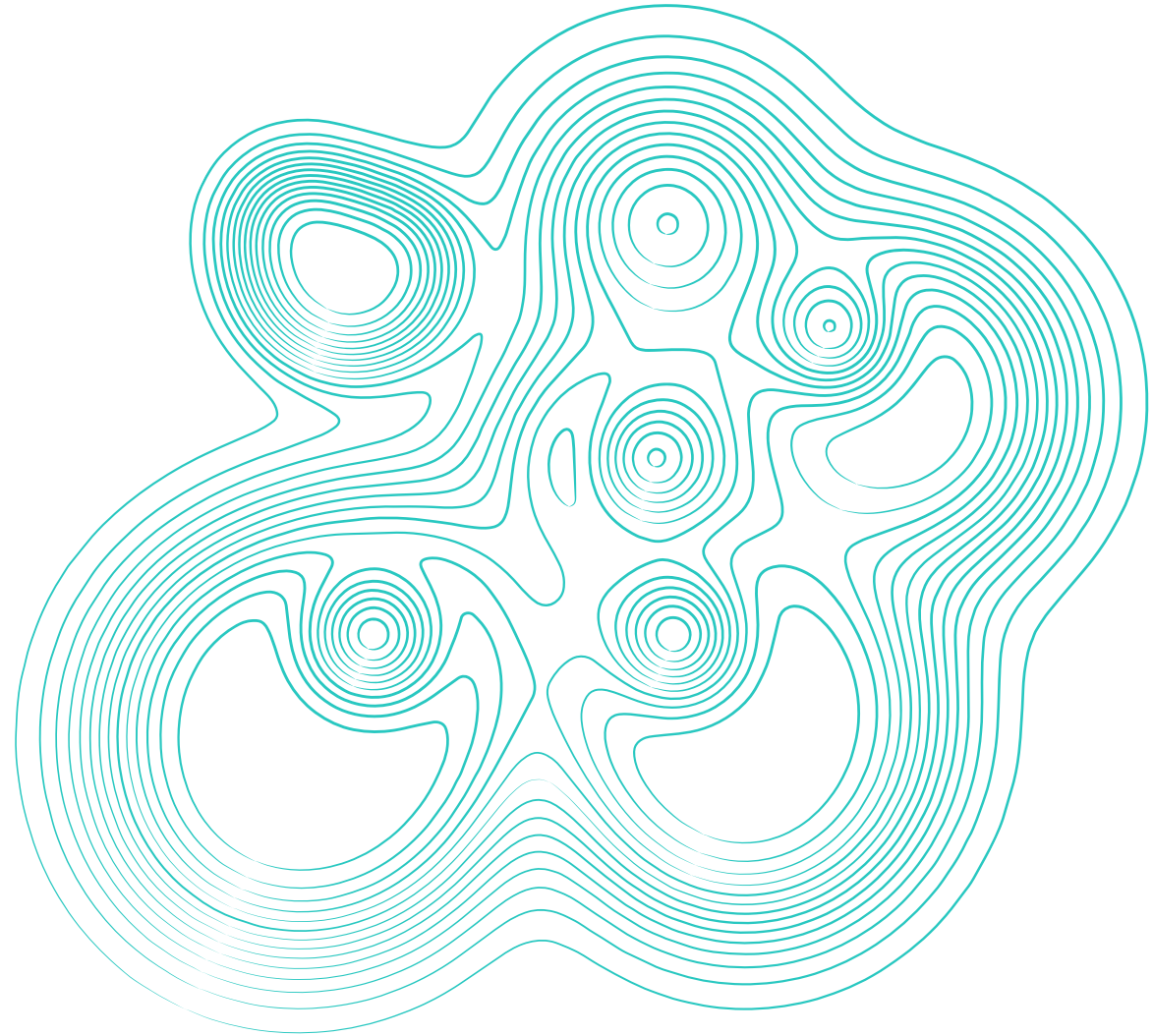
The current shop capacity is at 100 USD per day and the forecast capacity is at 400 USD per day.

Instant Messages 1 ^

Import from Excel Save **Submit Response**

COUPA SOURCING
OPTIMIZATION

1. Supplier's Guide to Coupa Sourcing Optimization



Coupa Sourcing Optimization

Coupa Sourcing Optimization (CSO) is a strategic sourcing solution provided by Coupa, designed to streamline and optimize the procurement process for organizations.

Coupa Sourcing Optimization (CSO) offers several benefits to suppliers that can enhance their experience and operational efficiency within the procurement process.

- ✓ Greater visibility into demand forecasts, market trends, and buyer requirements
- ✓ Direct interactions with buyers through the platform, leading to clearer expectations, faster responses to inquiries, and streamlined negotiations.
- ✓ Optimized pricing strategies
- ✓ Provides data-driven insights and analytics that aid in decision-making
- ✓ Simplified bidding process by providing a structured and transparent platform


How to Login to CSO

Go to the web address indicated in your login details and enter your username and your one-time password provided in the login ticket or invitation letter.

1. Or just click the link in the e-mail and Login.
2. Note that the one-time ticket can be used only once. You may retrieve a new temporary one-time password by clicking the "Forgot your password?" link in the login page.



The screenshot shows a login form with a header of various national flags. Below the flags, there are two input fields: "Username or Email:" and "Password:". A blue "Login" button is positioned below the password field. At the bottom, there are two links: "Forgot your password? If so, click here." and "Use a One-time Ticket to Login".



The screenshot shows the same login form as the previous one, but with the "Username or Email:" field filled with "megac5" and the "One-time Ticket:" field filled with "tFK7ND2d". The "Login" button is still present, and the links at the bottom are "Forgot your password? If so, click here." and "Login with Password".

How to Login to CSO

If it is the first time you visit CSO, after logging in you will be asked to change your password into one of your own choice.

The password must contain:

- ✓ At least 8 characters
- ✓ At least one digit
- ✓ At least one lower case letter
- ✓ At least one upper case letter

You will also be asked to review and update your personal contact information the first time you log in. Please make sure phone numbers are correct in case Event management should need to contact you. Click the Save button to continue to the main page, do not click the Log out button.

Start Page

This is your start page in CSO where you can see the Events you are invited to and if you are required to do anything at that moment.

The screenshot shows the TradeExtensions user interface. At the top, the user is logged in as 'Example Bidder' with links for 'Bidder' and 'Logout'. The language is set to 'English'. A notification bar indicates 'The password was changed.' Below this, a 'Welcome Example Bidder' section contains three main action buttons: 'Your Account Information', 'Your Organization Information', and 'Change Your Password'. The 'Your Projects' section features a table with one project listed.

Project	Information	Phase	Status	Start Time *	Closing Time *
Example Project		RFQ	0 of 2 tasks completed.	Oct 17, 2016 7:00 PM	Oct 31, 2016 8:00 PM

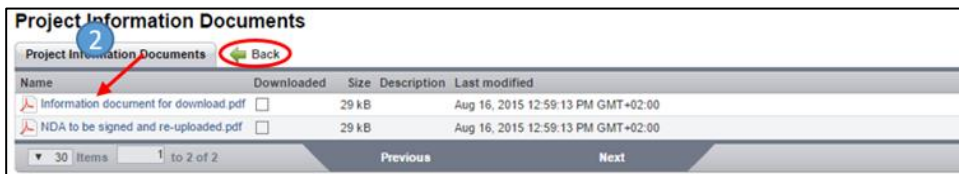
* All times are displayed in your current time zone: *Pacific Daylight Time*

Gating

You may be required to take part of some particular information prior to getting access to the Event page in a gating step.

Clicking the event name in the start page will take you to the gating page. If there is no gating requirements for the event at hand, you will be taken directly to the Event Overview page.

- Click the link to download the agreement documents and download all documents.
- Click the Back arrow.
- Check the box "I confirm that I have read..." and click the "Participate" button.
- Should you wish to decline participation, you will be asked to give a brief explanation.



Event Overview Page

On the event overview page, you can see and access the various tasks you are required to fulfil at the time being. If the event is in an evaluation phase, i.e. you just have to wait, you will be informed about that as well.

The screenshot shows the TradeExtensions interface for a project overview. The top navigation bar includes the TradeExtensions logo, user information (Logged in as Example Bidder), and a Logout link. The page title is 'Example Project - Project Overview'. The main content area is titled 'Project Overview [Example Project]' and indicates the project is in a 'Request For Quote Phase'. A yellow banner provides a deadline: 'Review the mandatory actions below and complete them before Oct 31, 2016 8:00:00 PM'. A table of 'Required Actions' is displayed, with two tasks: 'Place Bid (required)' and 'Questionnaire (required)'. Both tasks have a status of 'Not OK' and a 'Go' button. A red box highlights the left-hand navigation menu, and a green box highlights the 'Required Actions' table.

Required Actions	Status	Completed on
Place Bid (required) Go	Not OK	
Questionnaire (required) Go	Not OK	

* All times are displayed in your current time zone: Pacific Daylight Time

The actions that are required from you are shown in the list (green box in the screen shot above). When the task is completed, the status is changed to OK with a happy smiley icon. Tasks that are not mandatory are marked as "Not yet completed" throughout the event.

To enter a given task, click either the blue "Go" button or the name of the task, see next section.

In the top left corner of the event overview page (red box in the screen shot above), there are links for information and questions

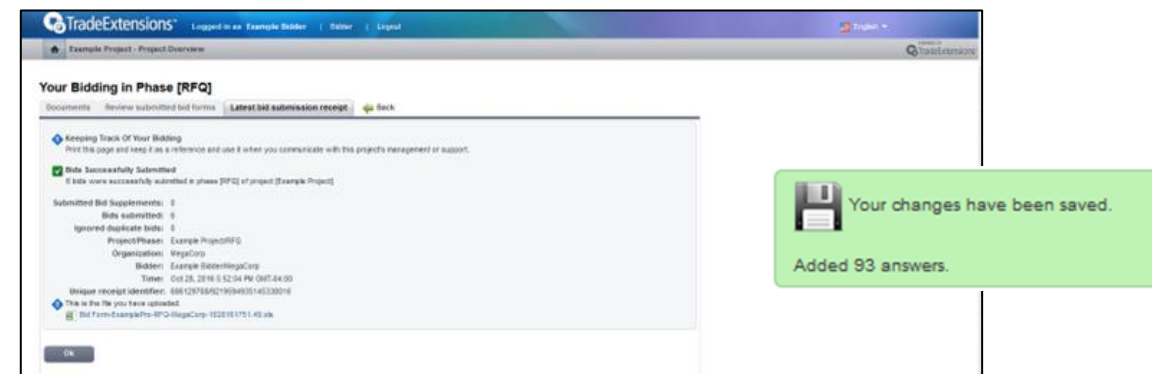
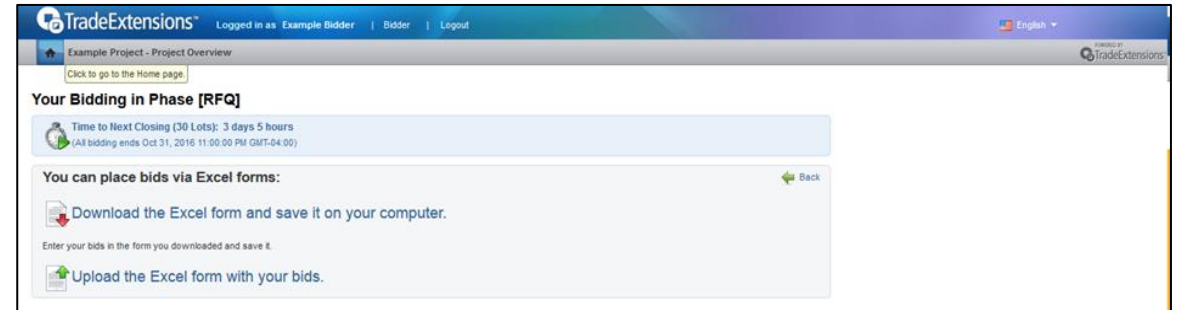
Request for Quote/Request for Information

The procedure is the same for RFI Questionnaires as for RFQ Bid forms.

Click the link to the task in the event overview page, for instance "Place bids" in the example above. Click "Download" and save the empty bid form or questionnaire on your computer.

Complete the requested information and make sure all mandatory questions have been answered. Save the completed form, go back to CSO and click the "Upload" link.

Browse for the saved questionnaire or bid form on your computer and click "Submit". You will get a receipt that your answers have been properly submitted.



Error Messages

If some mandatory information is missing or not correct, you will get an error message upon submission. The message will tell you which information is not accepted and why. In addition, the rejected form contains an additional sheet which lists the errors and points to the cells to be corrected.

The rejected form may be downloaded directly from the receipt page or from the "Upload" page.

Review the error message(s) carefully, revise/complete the information, save the completed form and re-submit it as described above.

Your Bidding in Phase [RFQ]

Documents | Review submitted bid forms | **Latest bid submission receipt** | Back

Keeping Track Of Your Bidding
Print this page and keep it as a reference and use it when you communicate with this project's management or support.

You have encountered errors during submission. Download this marked up file. You will find a sheet named ERRORS AND WARNINGS, where all errors will be listed.

Rejected Bid Form-ExamplePro-RFQ-MegaCorp-1028161749.38.xls
>> No bids were uploaded.

>> Your bid for lot [1001] in row 5, sheet [Single Bids] is invalid since it is missing mandatory data. If you do not want to place a bid on this lot, you must leave all cells empty (first non empty cell found was R5, with the value [5.00]). The data missing from this bid is: You must enter a value for the field [Bidder Equipment Type] in cell T5 of sheet [Single Bids].

More replies exist. Display all replies

No Bids Were Submitted
No bids were found in this submission.

Submitted Bid Supplements: 0
Bids submitted: 0
Ignored duplicate bids: 0

Project/Phase: Example Project/RFQ
Organization: MegaCorp
Bidder: Example Bidder/MegaCorp
Time: Oct 28, 2016 5:50:16 PM GMT-04:00

You have encountered errors during submission. Download this marked up file. You will find a sheet named ERRORS AND WARNINGS, where all errors will be listed.

Rejected Bid Form-ExamplePro-RFQ-MegaCorp-1028161749.38.xls

Ok

Upload bids from Excel | **View the latest uploaded form**

Below you can click to download your latest accepted form, or your latest rejected form. If you have a rejected form, it contains a sheet called "ERRORS AND WARNINGS" in which you can view the error/warning messages that arose when the system received the file.

Name	Received	Result
Rejected Bid Form-Transporta-RFQ1-SupplierA-0209171813.53.xls	Feb 9, 2017 6:13:54 PM GMT+02:00	Rejected
Bid Form-Transporta-RFQ1-SupplierA-0405161855.48.xls	Apr 5, 2016 6:55:48 PM GMT+02:00	Accepted

View Documents

Here you can retrieve all documents provided for download as well as all the forms that you have submitted in the current phase. The star indicates if there are documents available that you have not yet downloaded (including your own submitted forms).

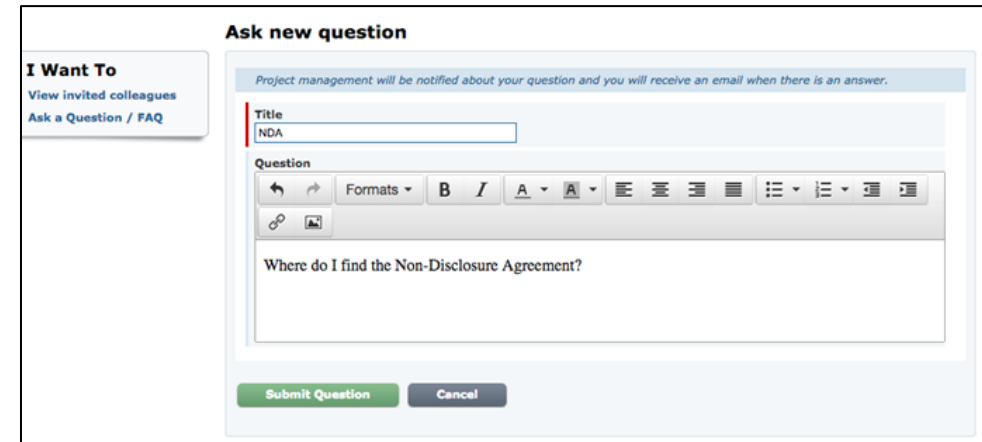
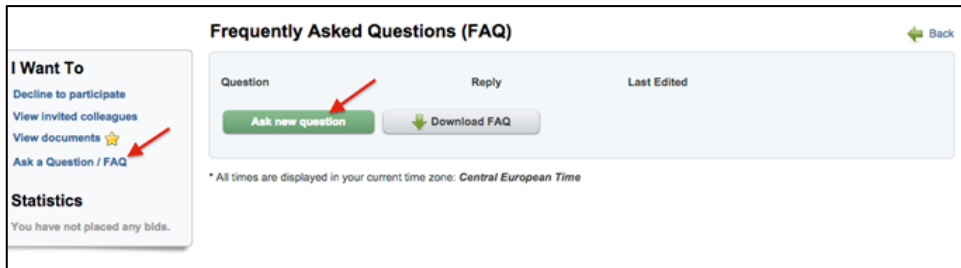
The screenshot shows a web interface for viewing documents. On the left is a sidebar with 'Options' (View invited colleagues, View documents with a star icon, Ask a Question / FAQ with a star icon) and 'Statistics' (There are 333 lots in this project. You have placed 285 bids.). The main area is titled 'Documents In [Transportation Ten...]' with a 'Back' arrow. It contains a table with columns for Name, Category, Size, Date, and Desc. The table lists three items: 1. Bid Form-Transporta-RFQ...plierA-0405161855.48.xls (376 kB, Apr 5, 2016 6:55:48 PM GMT+02:00, RFQ Reply, 44w 01d); 2. Information document for download.pdf (29 kB, Aug 16, 2015 12:59:13 PM GMT+02:00, Information, 77w 04d); 3. NDA to be signed and re-uploaded.pdf (30 kB, Aug 16, 2015 12:59:13 PM GMT+02:00, Information, 77w 04d). At the bottom, it shows '30 Items 1 to 3 of 3' and 'Previous Next' navigation buttons.

	Name	Category	Size	Date	Desc
1	Bid Form-Transporta-RFQ...plierA-0405161855.48.xls	RFQ Reply	376 kB	Apr 5, 2016 6:55:48 PM GMT+02:00	44w 01d
2	Information document for download.pdf	Information	29 kB	Aug 16, 2015 12:59:13 PM GMT+02:00	77w 04d
3	NDA to be signed and re-uploaded.pdf	Information	30 kB	Aug 16, 2015 12:59:13 PM GMT+02:00	77w 04d

Use the Back arrow to get back to the event page.

Ask a Question/FAQ

Here you can contact event support if you have any questions concerning the event. Click the green button "Ask new question", describe your question as carefully as possible in the editor window and click "Submit question".



The answer will appear next to your question on the "FAQ" page. Click the question name to see the answer or click the "Download FAQ" button to download all questions and answers in an Excel file.





worley

DELIVERING SUSTAINABLE CHANGE