Coupa Supplier Training Guide

November 2024

Agenda / Contents

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
BUSINESS SPEND MANAGEMENT

COUPA SUPPLIER INFORMATION MANAGEMENT (SIM)

1. Invitations

Coupa Supplier Information | 3 Ways to Respond

Direct SIM Invitation	CSP Linked Update	Forwarded Invitation from a Coworker
Worley will send a 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.	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.	Suppliers can invite others within their organization to the Complete the Supplier information update by forwarding the invitation.

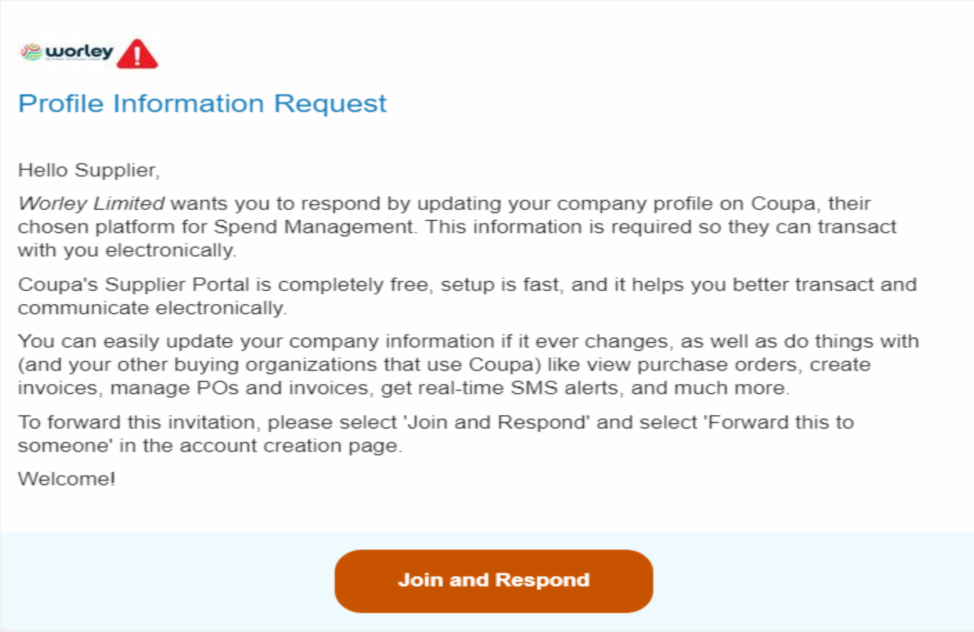
The Worley Invitation

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)	Already In Coupa (Start at Step 10)



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.

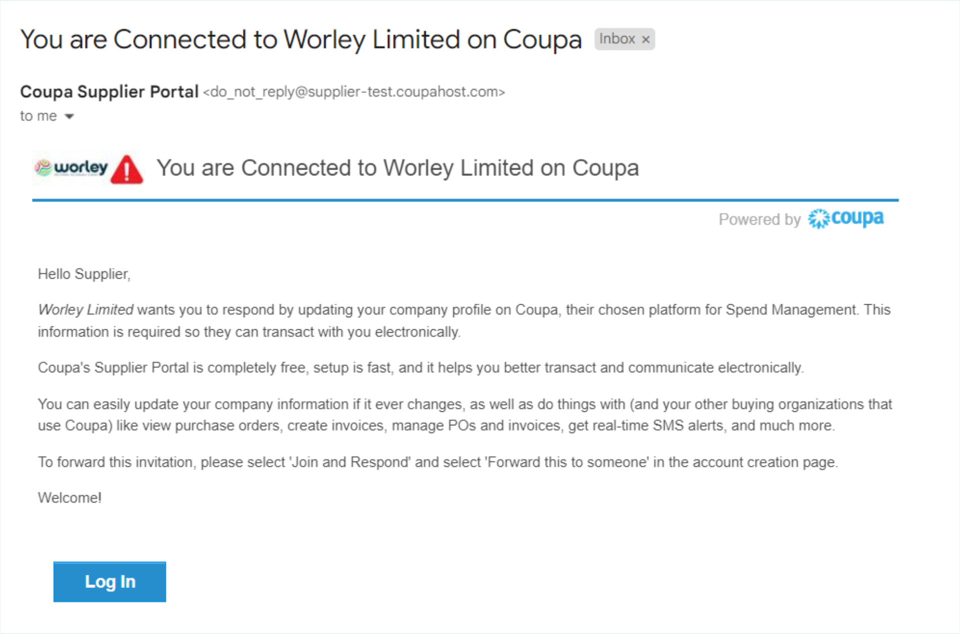
Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

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



You are Connected to Worley Limited on Coupa Inbox ×

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

to me

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.

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

Welcome!

Log In

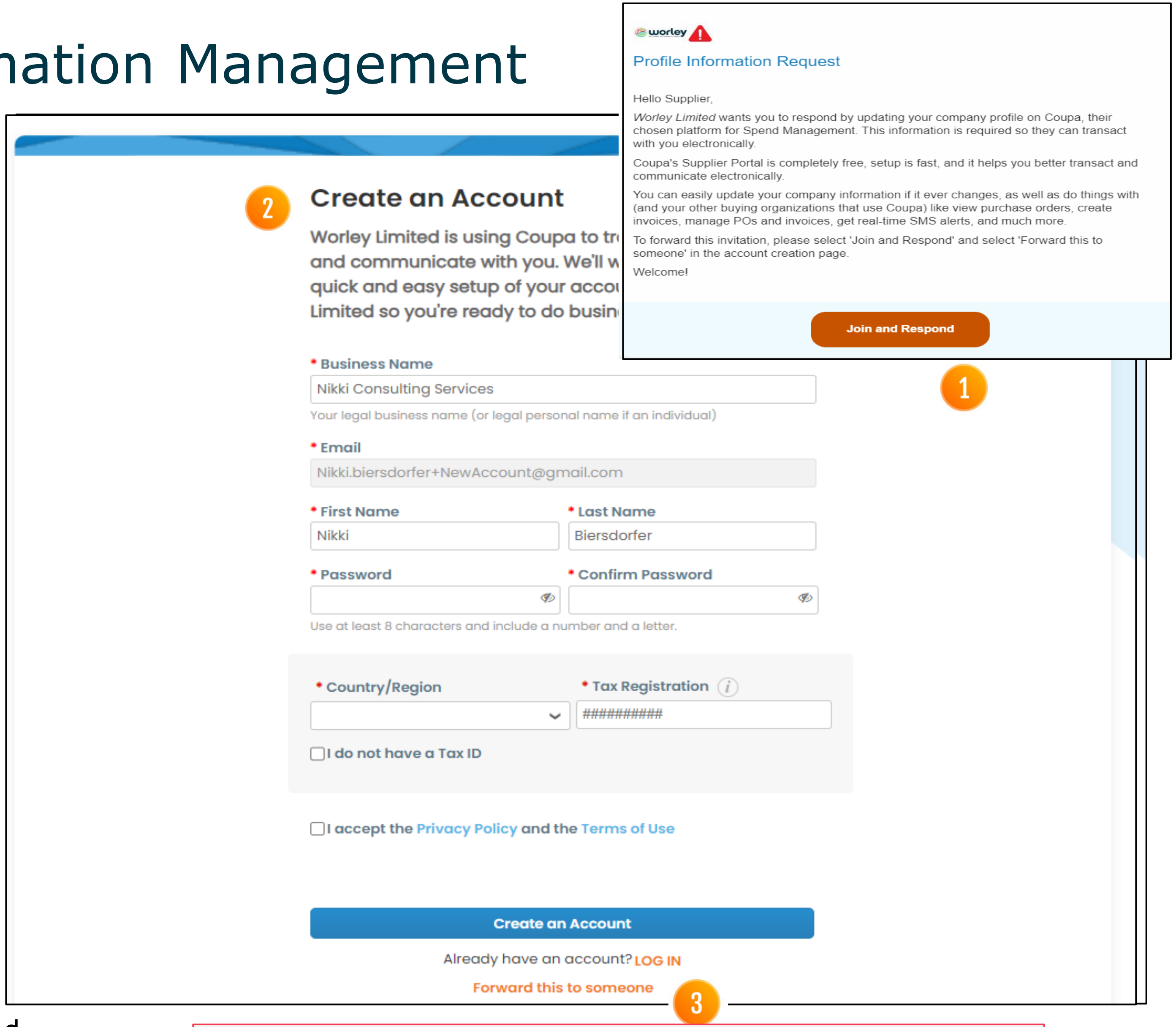
New to Coupa | Supplier Information Management
SIM Invitation

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"



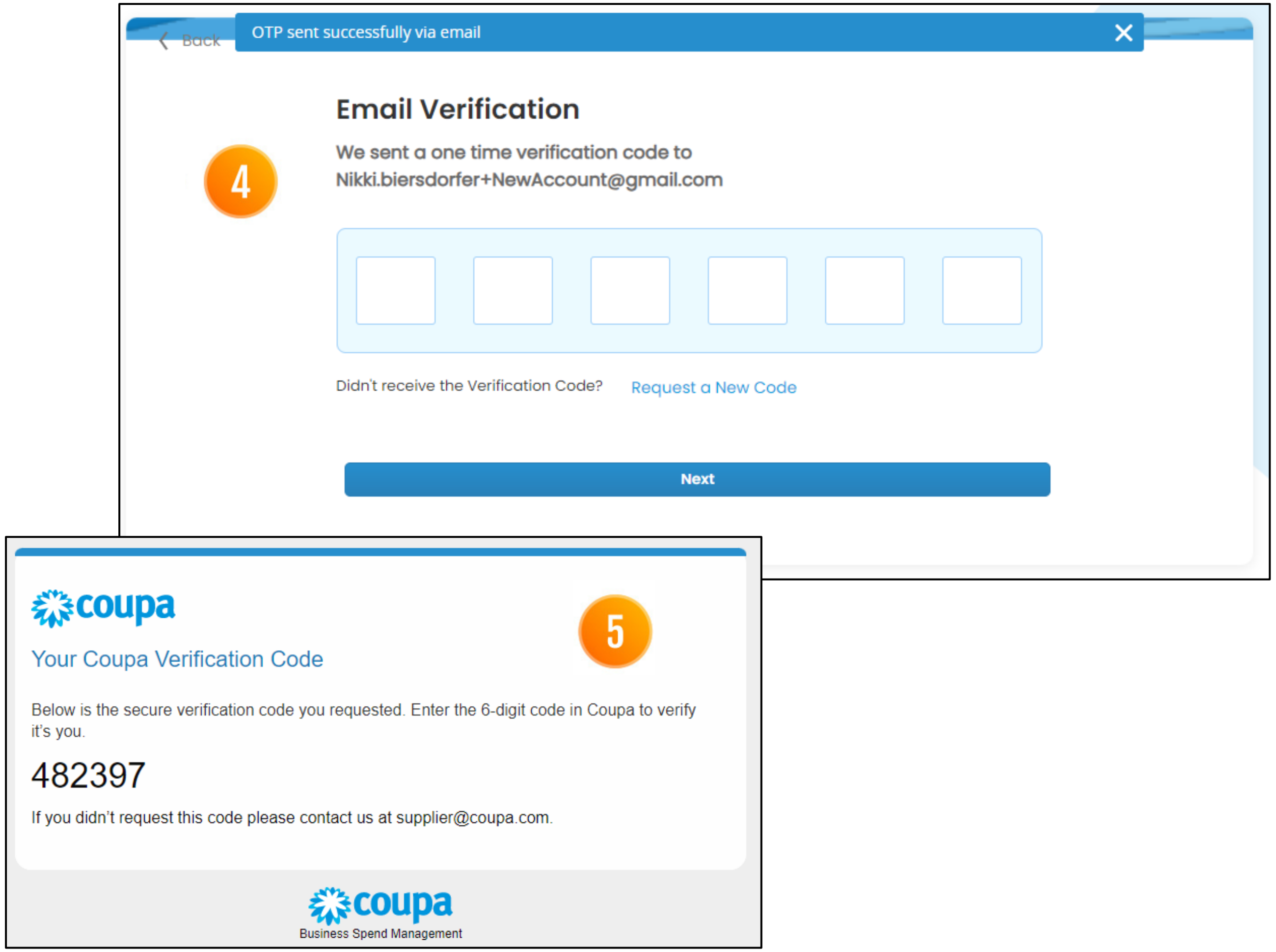
**Coupa takes your data security seriously, if you would like to read more about their compliance and security measures click here

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)

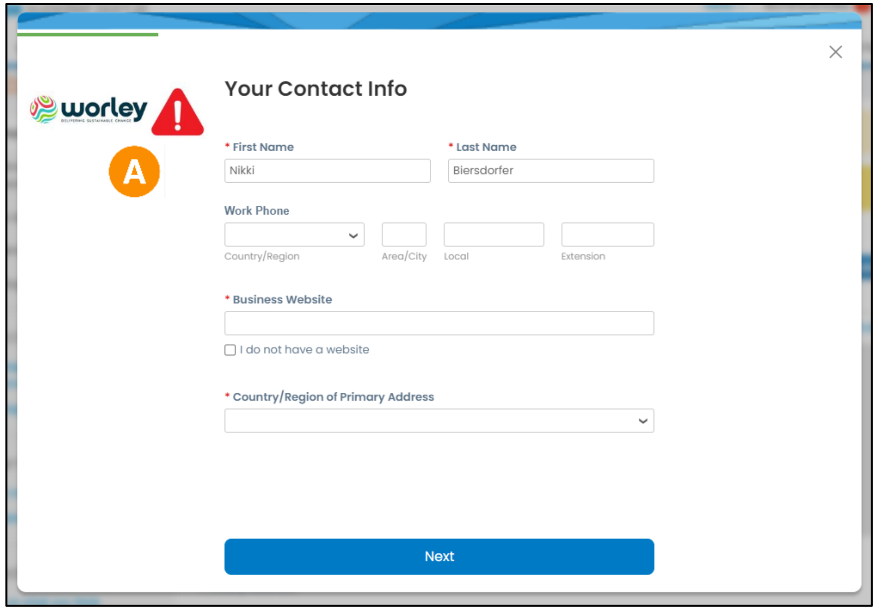


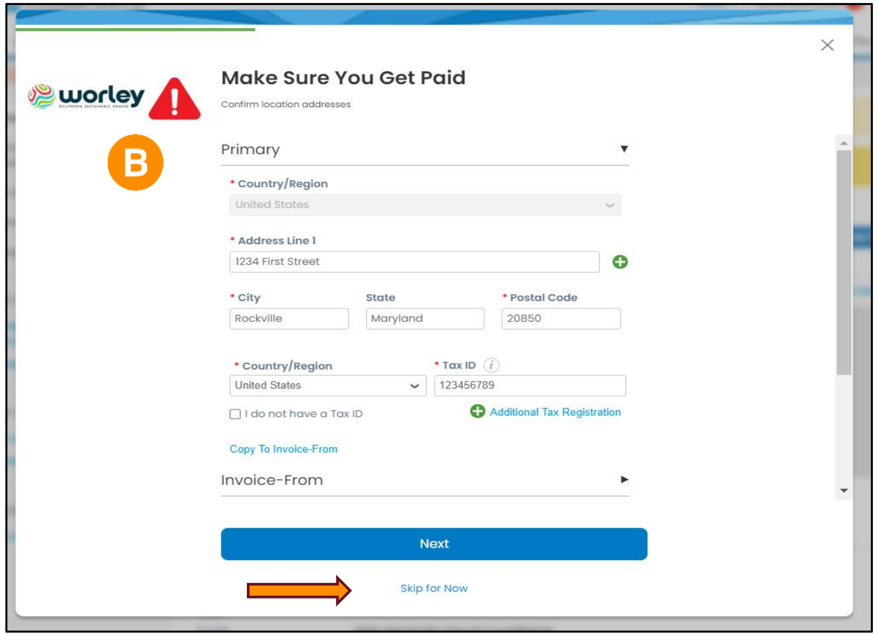
New to Coupa | Supplier Information Management
SIM Invitation

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)

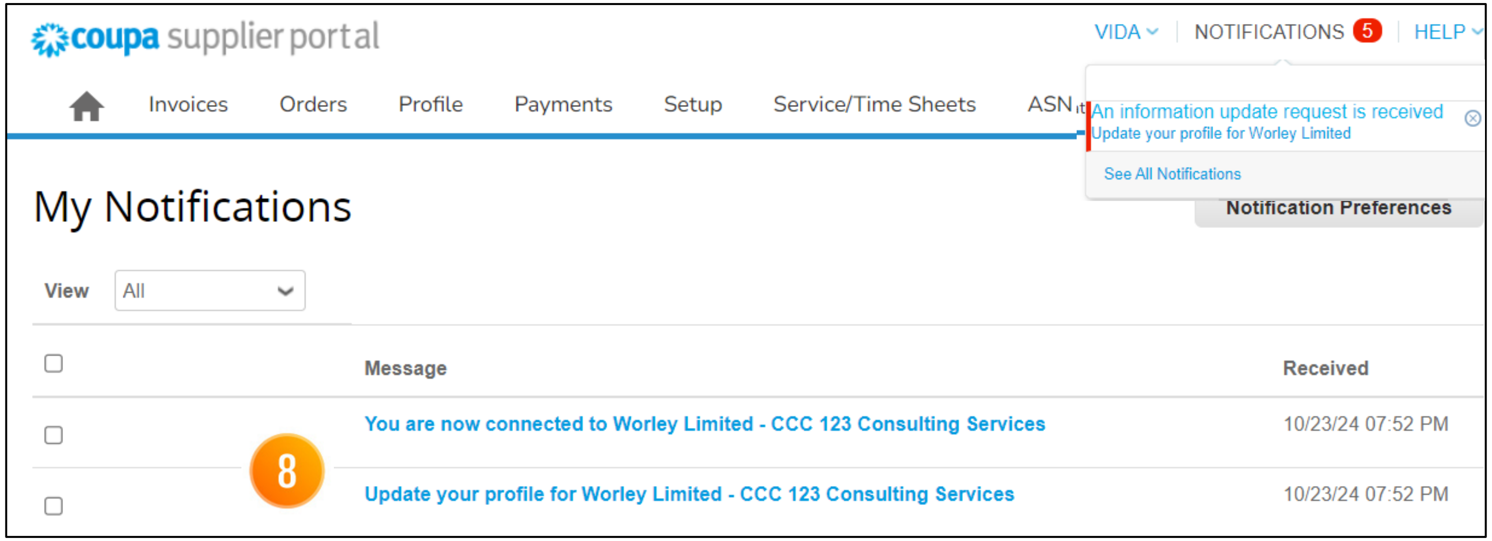
   B. Additional Sections such as Making sure you get paid will follow and will be optional if you select the “skip for now” option





New to Coupa | Supplier Information Management
SIM Invitation

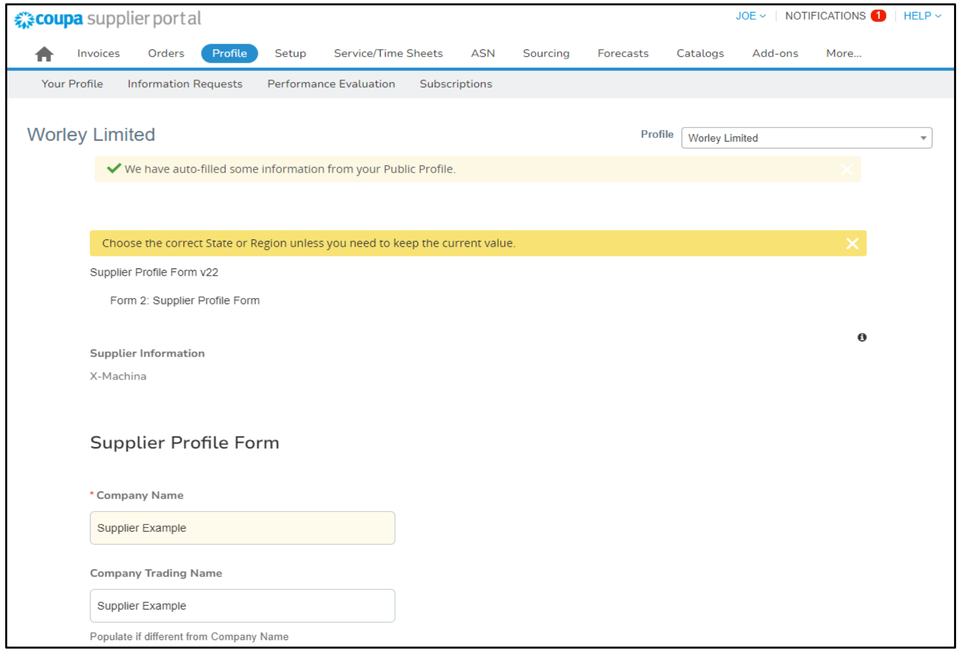
7



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



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

COUPA SUPPLIER INFORMATION MANAGEMENT (SIM)

2. Information Management

New to Coupa | Supplier Information Management
SIM Invitation

10

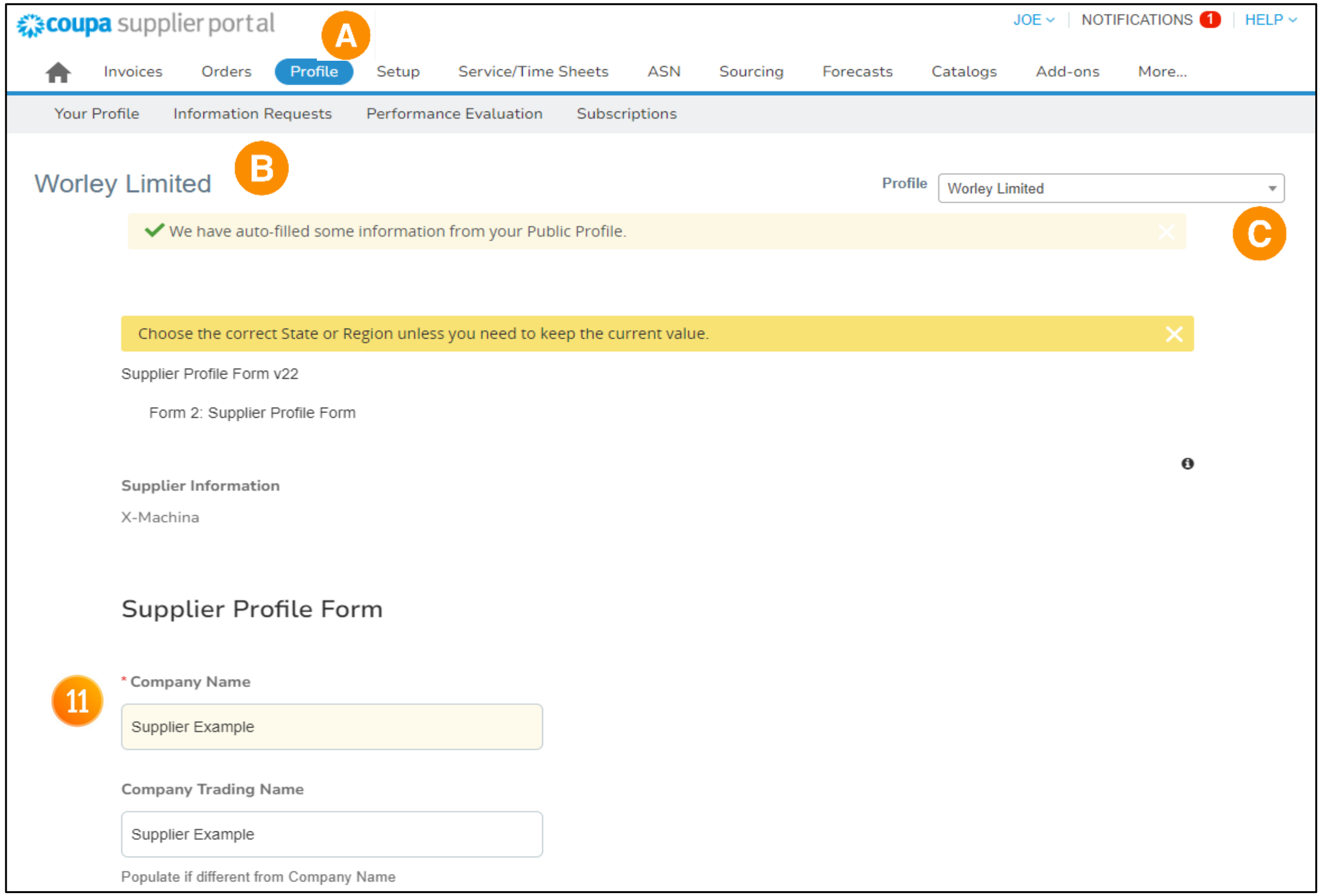
10. You can also access this supplier information request by navigating your Coupa Supplier Portal (CSP)
    A. Select Profile

    B. Select Information Requests

    C. Confirm Worley is the Profile Selected

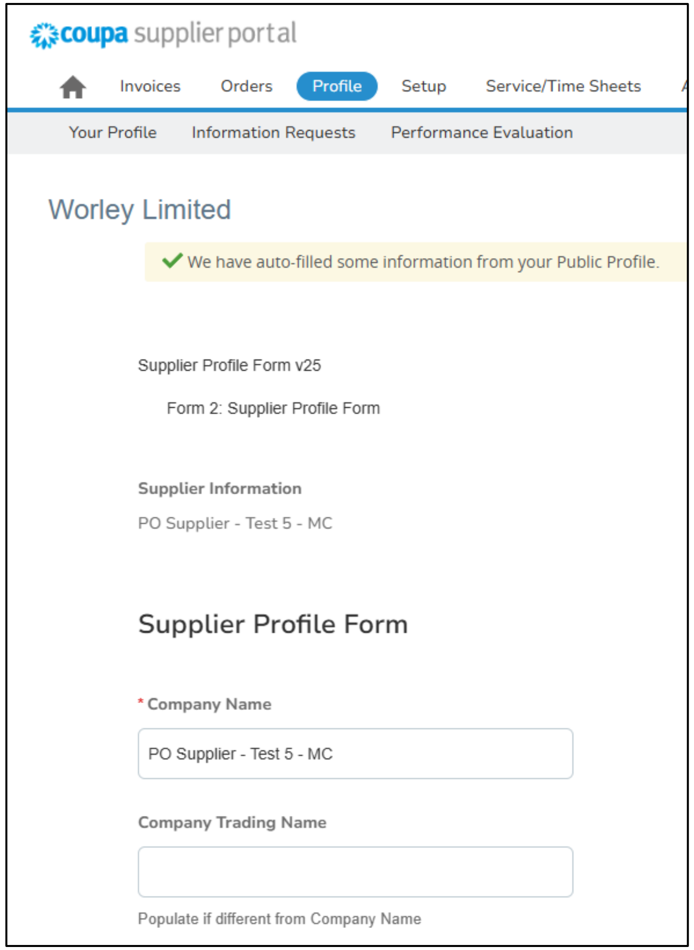
HINT: *this form will default information from your Coupa supplier profile. While you are reviewing and completing this form, the fields can be updated for accuracy.*

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.



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).



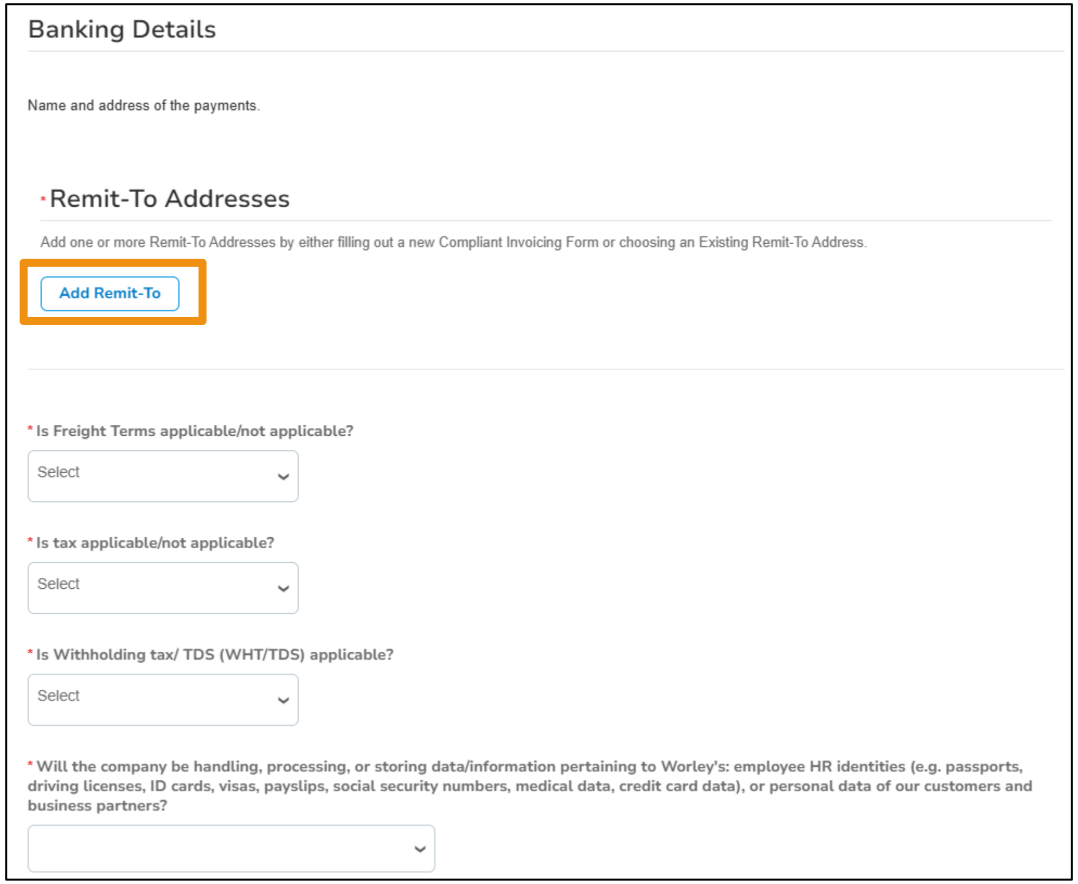
Fields – Supplier Profile Form

- **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***

*** Mandatory 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).



Banking Details

Name and address of the payments.

*Remit-To Addresses

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

Add Remit-To

*Is Freight Terms applicable/not applicable?

Select

*Is tax applicable/not applicable?

Select

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

Select

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

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

Fields – Supplier Profile

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**

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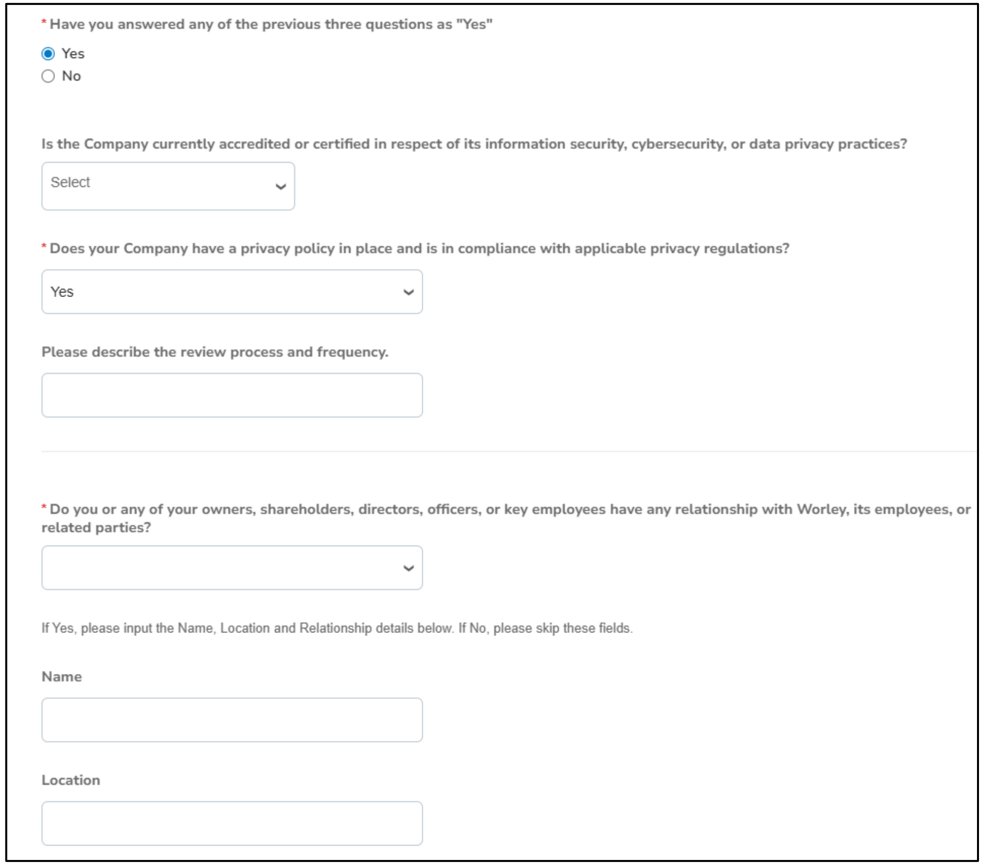
OneSource Digital Sourcing Transformation Project

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 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

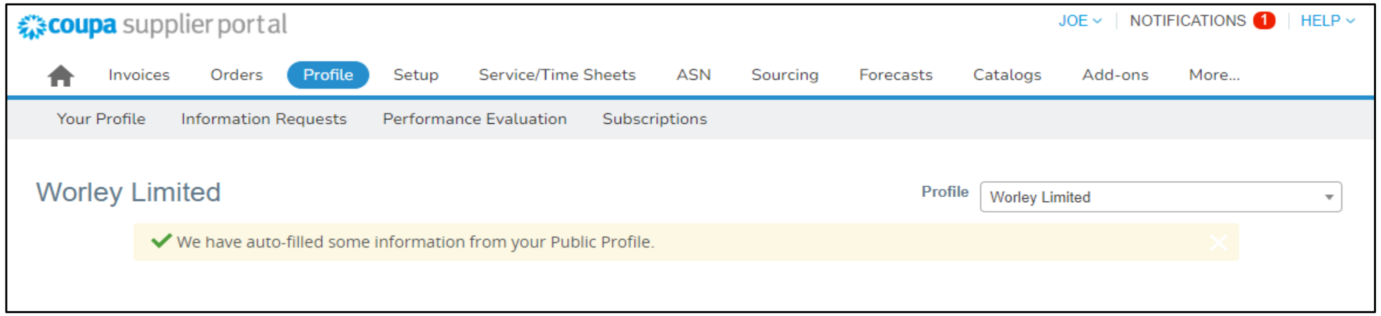
- **Do you or any of your owners, shareholders, directors, officers, or key employees have any relationship with Worley, its employees, or related parties?* (C)**
    - Name
    - Location
    - Relationship details
- Is there any other information you would like to disclose about your Company including 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

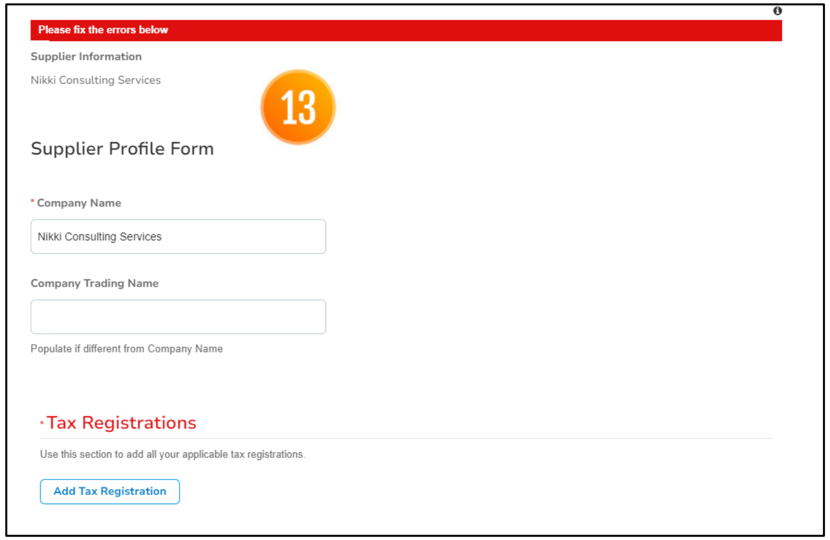
*** Mandatory Field** **(C) = Conditional Field**

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



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.



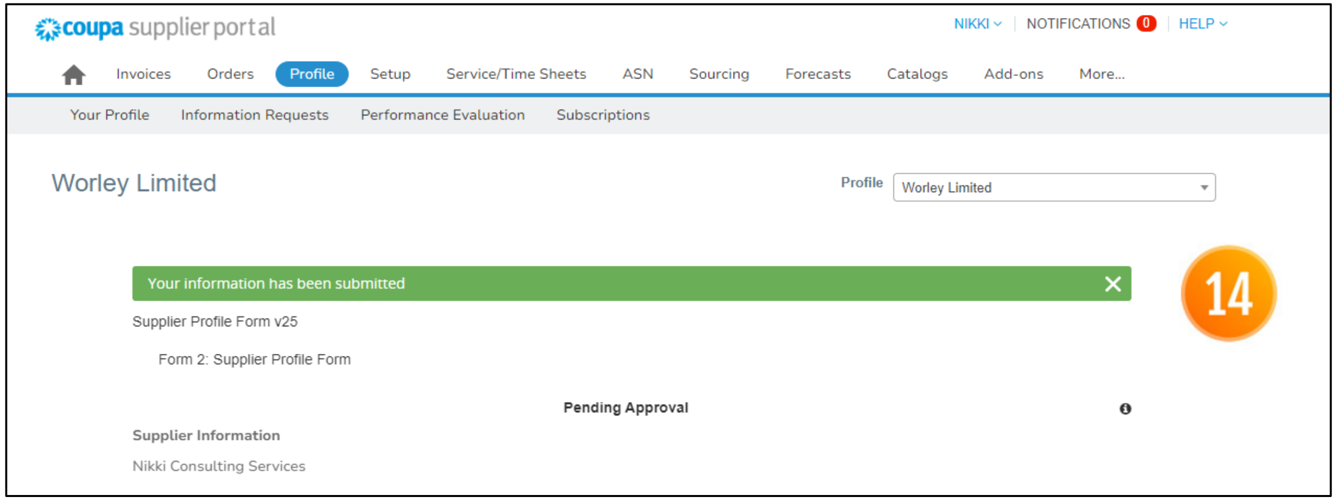
New to Coupa | Supplier Information Management

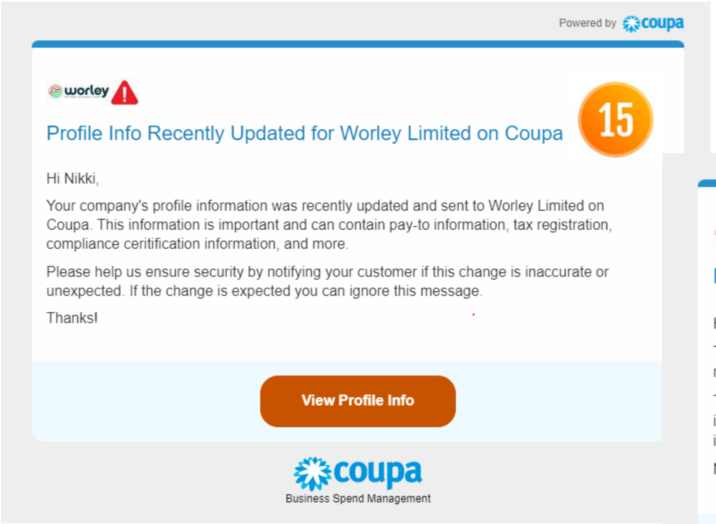
SIM Invitation

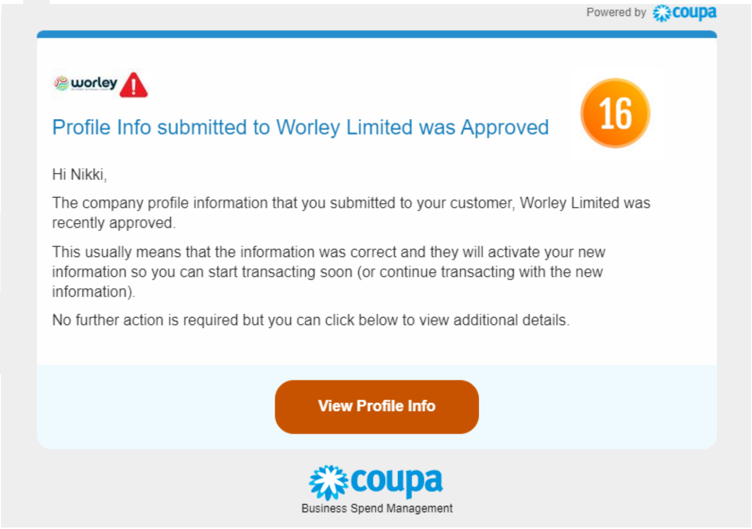
14. After you select Submit for approval – you will receive a green bar. This indicates your form has submitted back to Worley for review.

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.







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OneSource Digital Sourcing Transformation Project

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: • 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

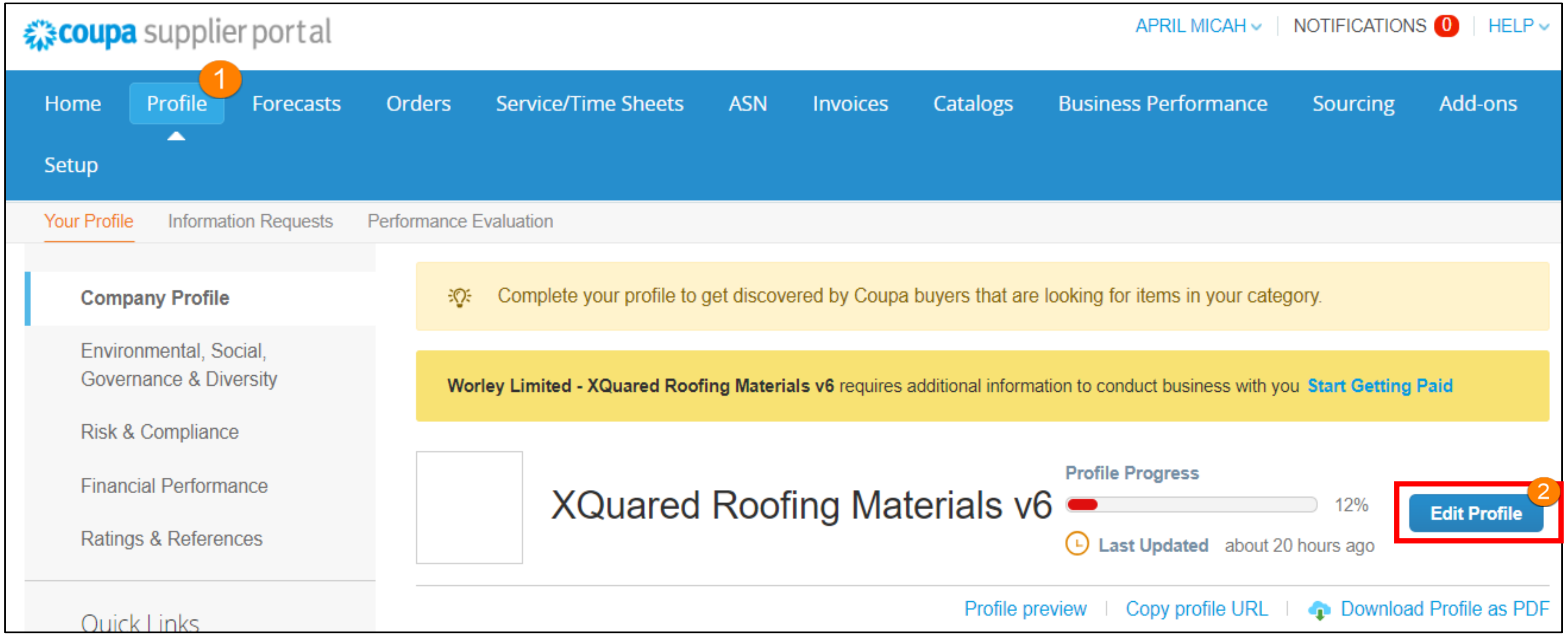
Coupa Supplier Portal | Manage Profile

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.

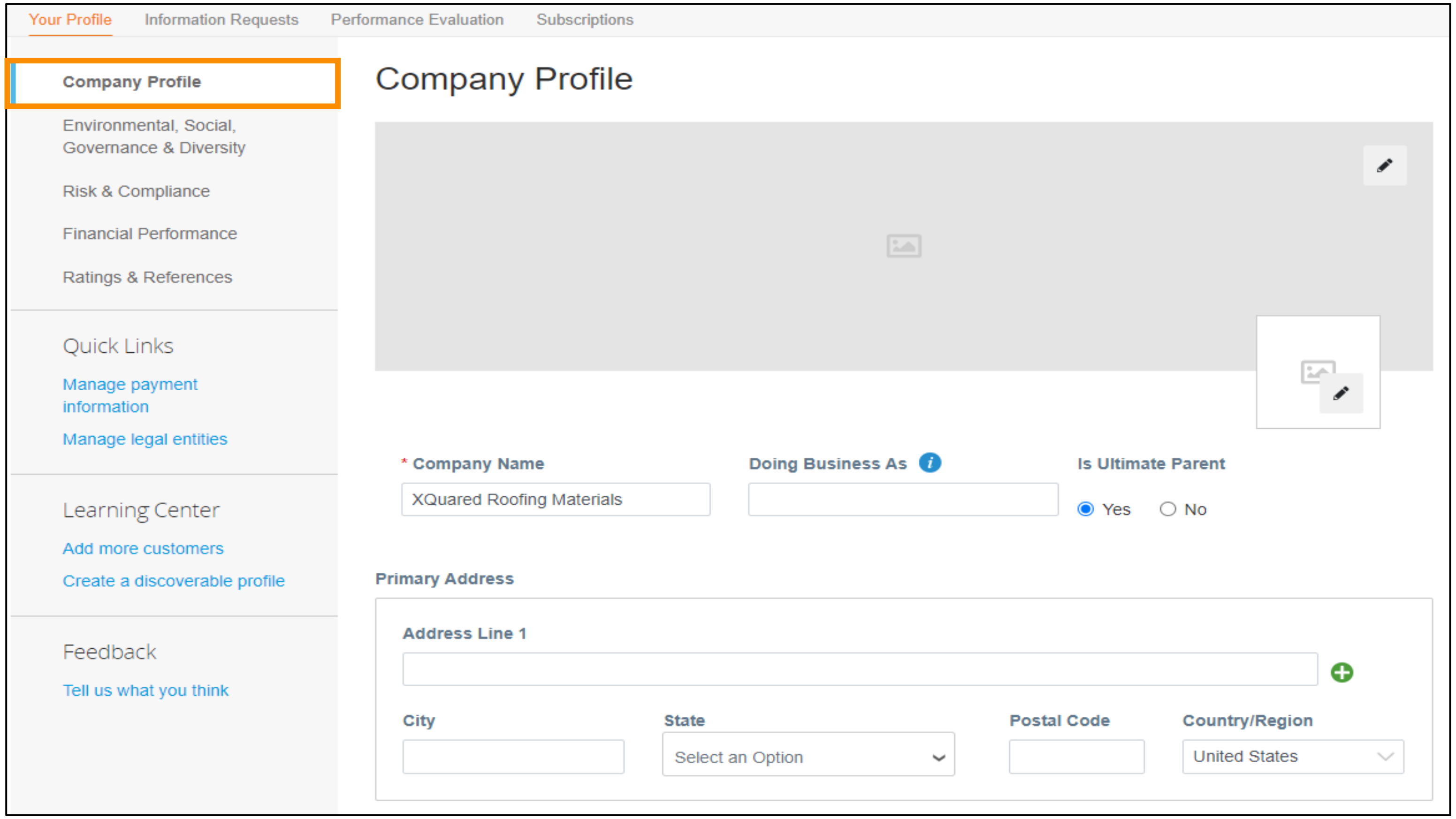


*Profile data doesn't automatically update customer request … see slide 31 for instructions on how to update customer information requests

Coupa Supplier Portal | Manage Profile

1. Company Profile

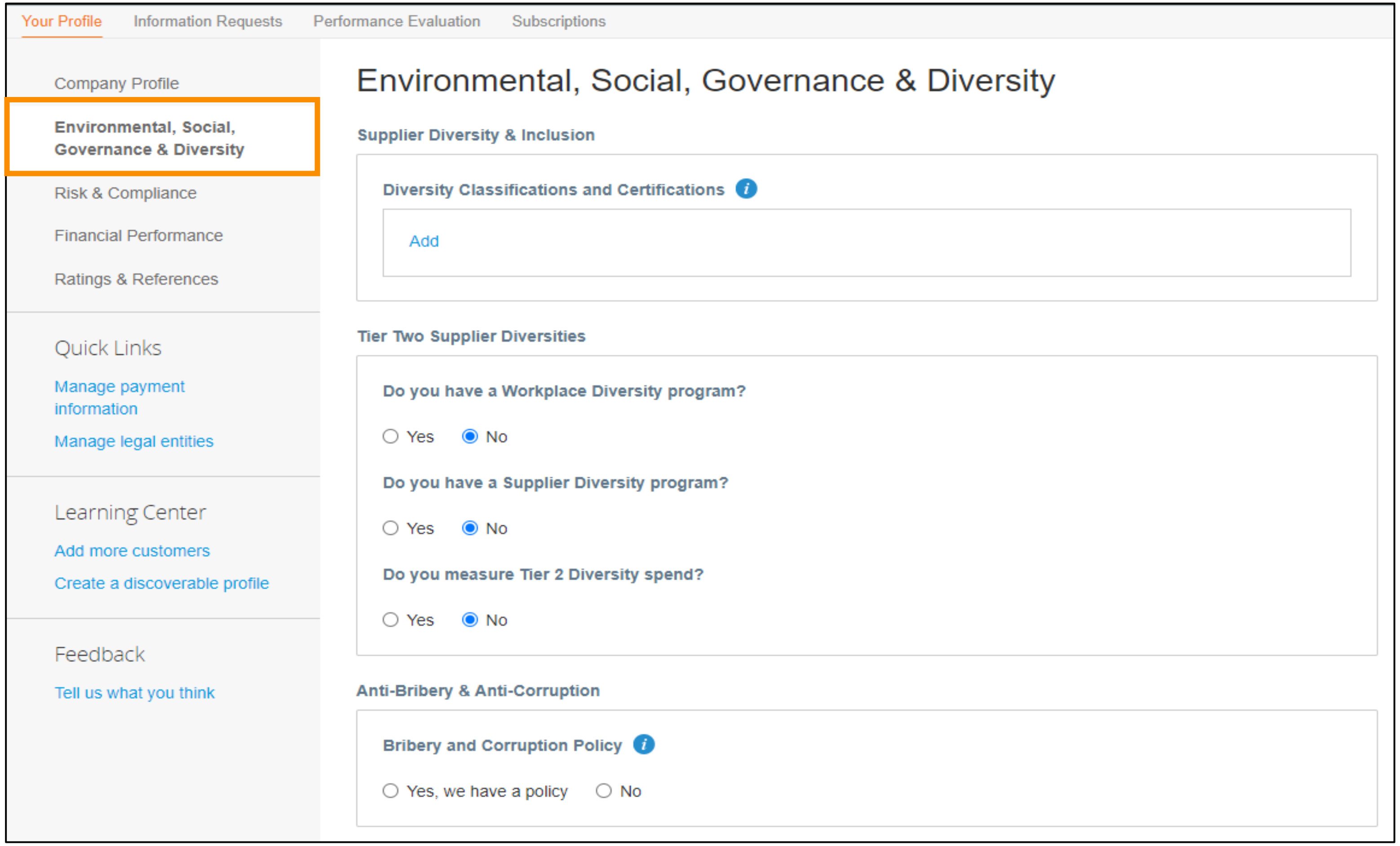
The Company Profile section gives customers background information about your business, such as what your business does, how customers can contact your business, and how they can interact with your business on social media.



Coupa Supplier Portal | Manage Profile

2. Environmental, Social, Governance & Diversity

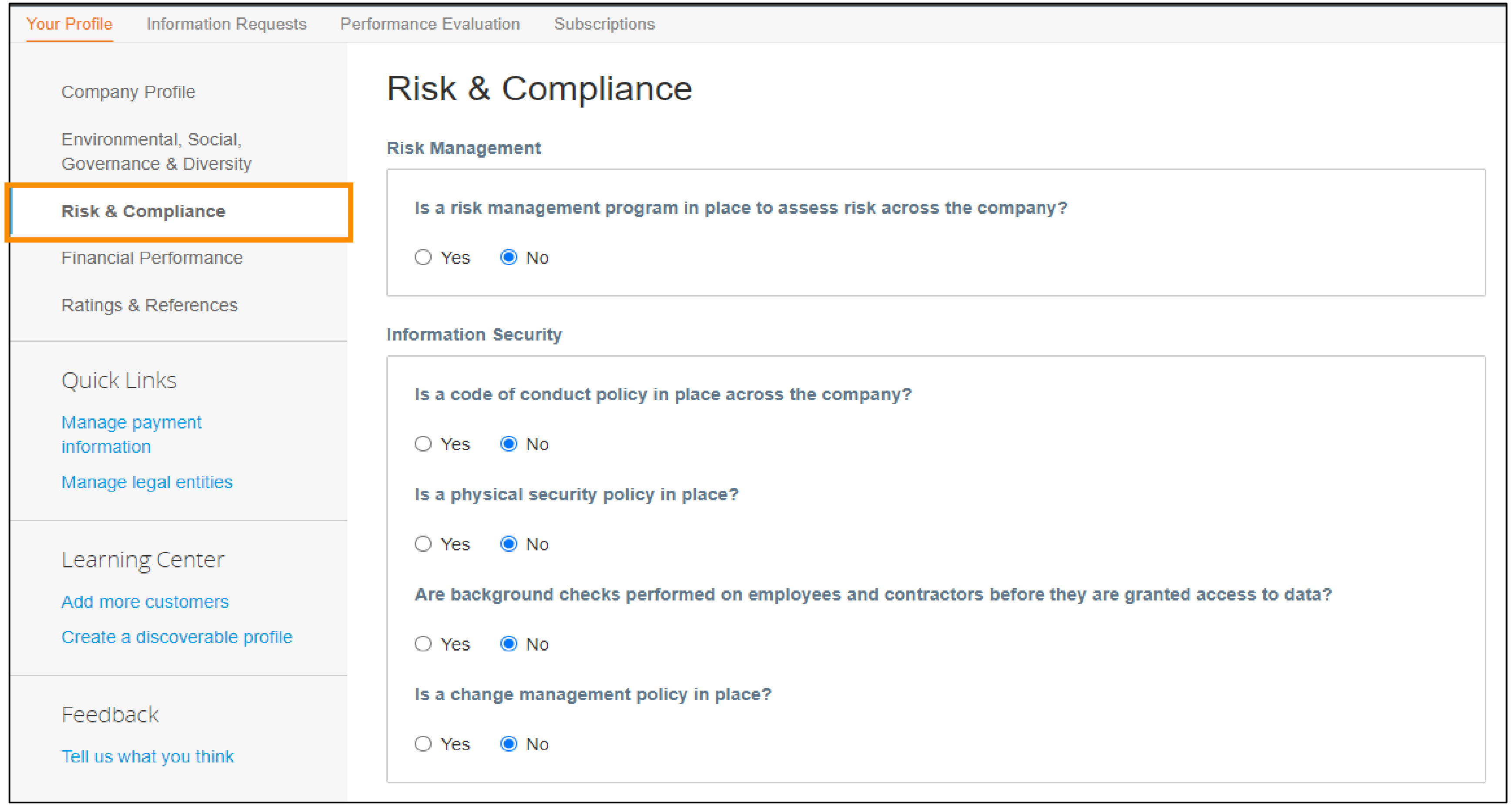
The Environmental, Social, Governance & Diversity section gives your customers information about how your business engages with social goals.



Coupa Supplier Portal | Manage Profile

3. Risk & Compliance

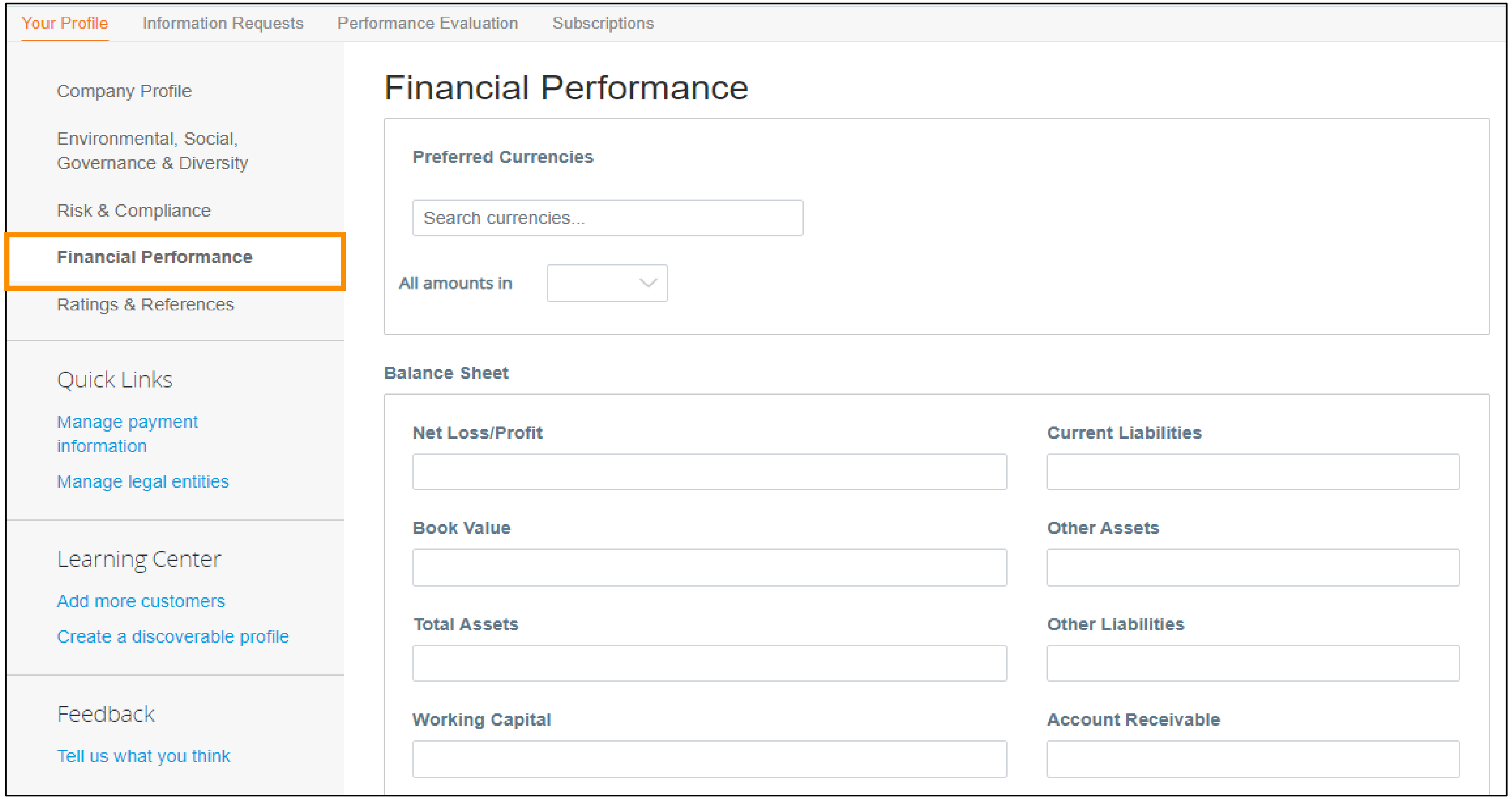
The Risk & Compliance section gives your customers information the risk and compliance considerations they need to understand to do business with your company.



Coupa Supplier Portal | Manage Profile

4. Financial Performance

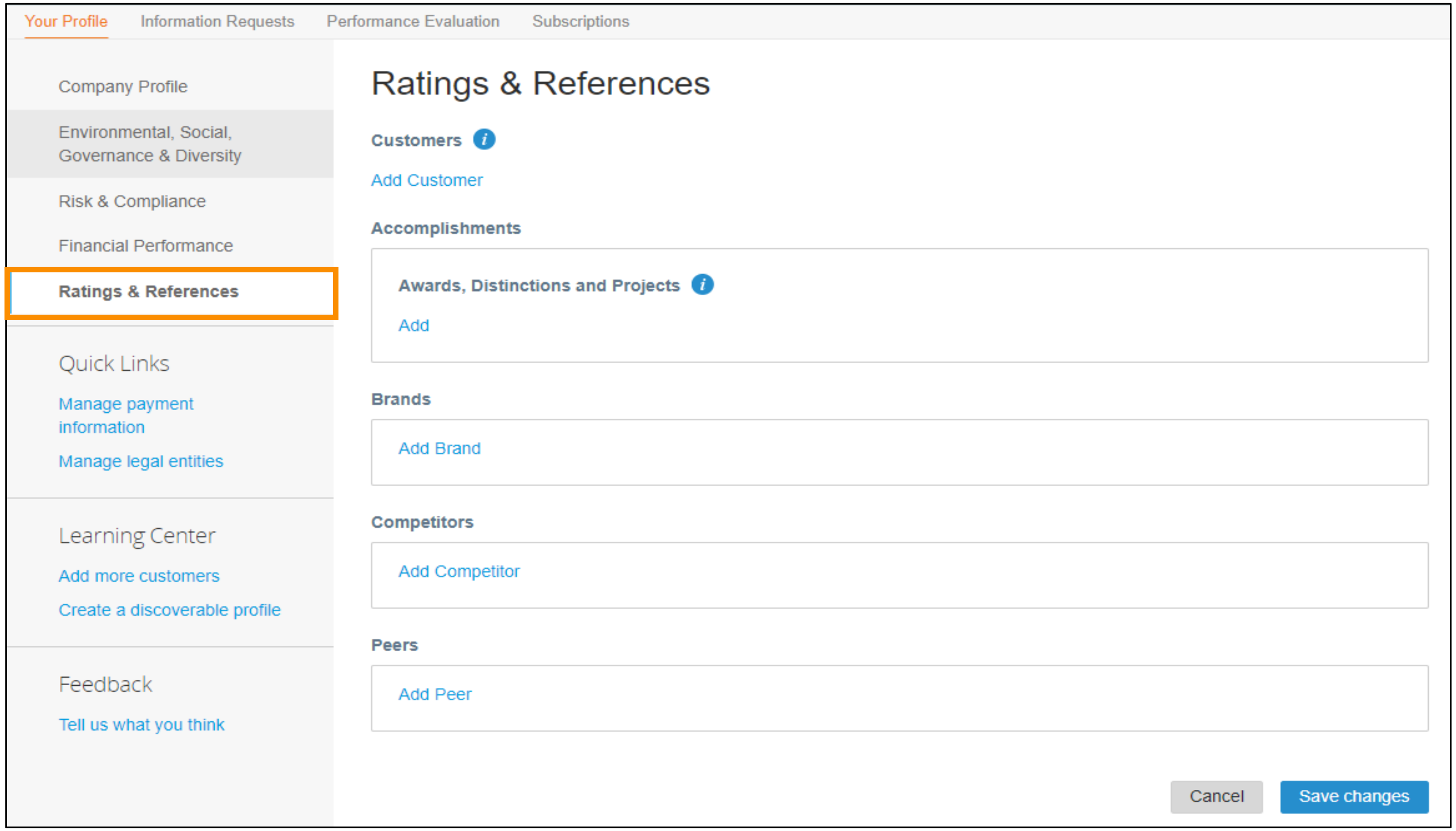
The Financial Performance section shows information about your business's financials. This section doesn't display on your profile, and you can choose to include it on your profile PDF.



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.

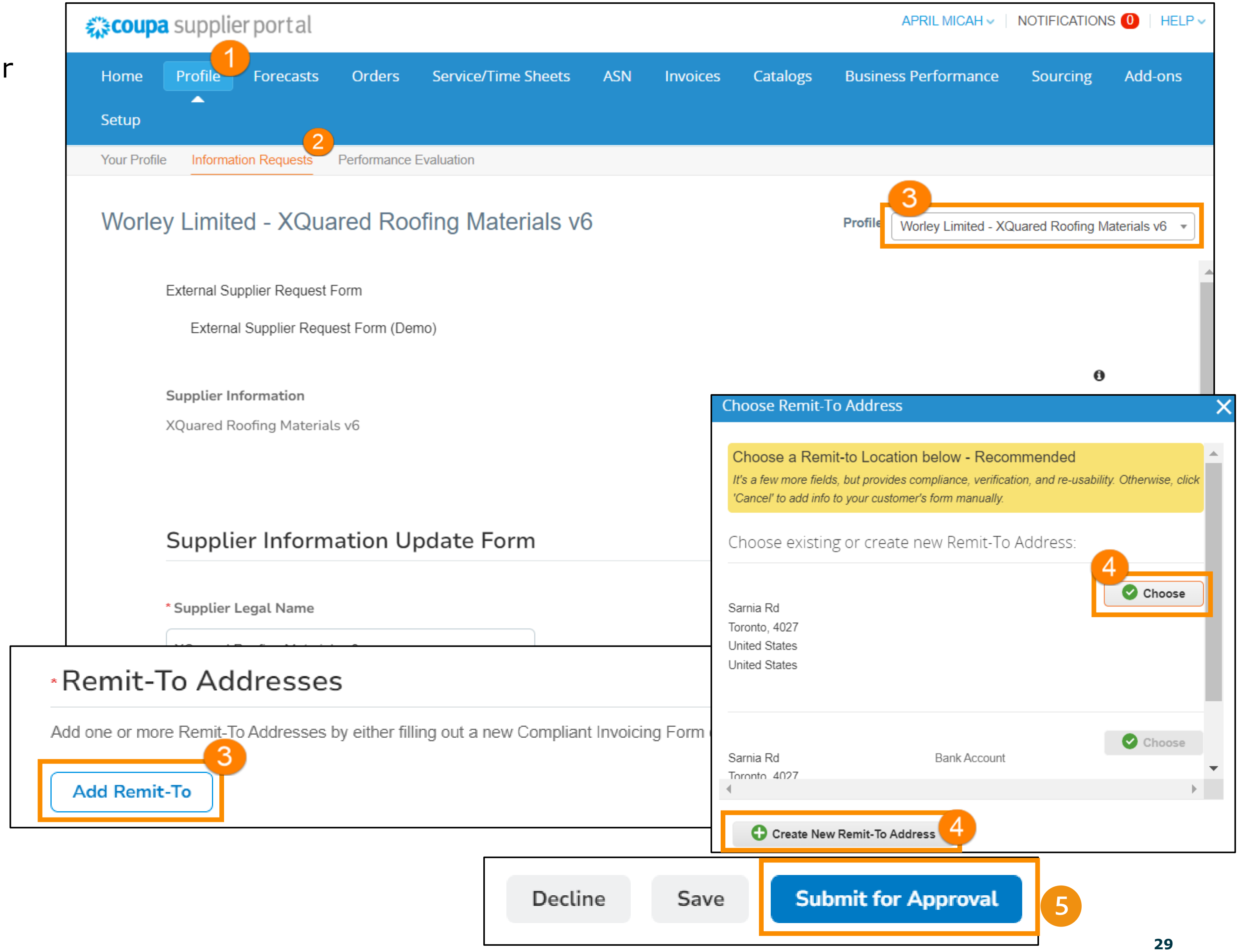


Coupa Supplier Portal | Manage Profile

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**.



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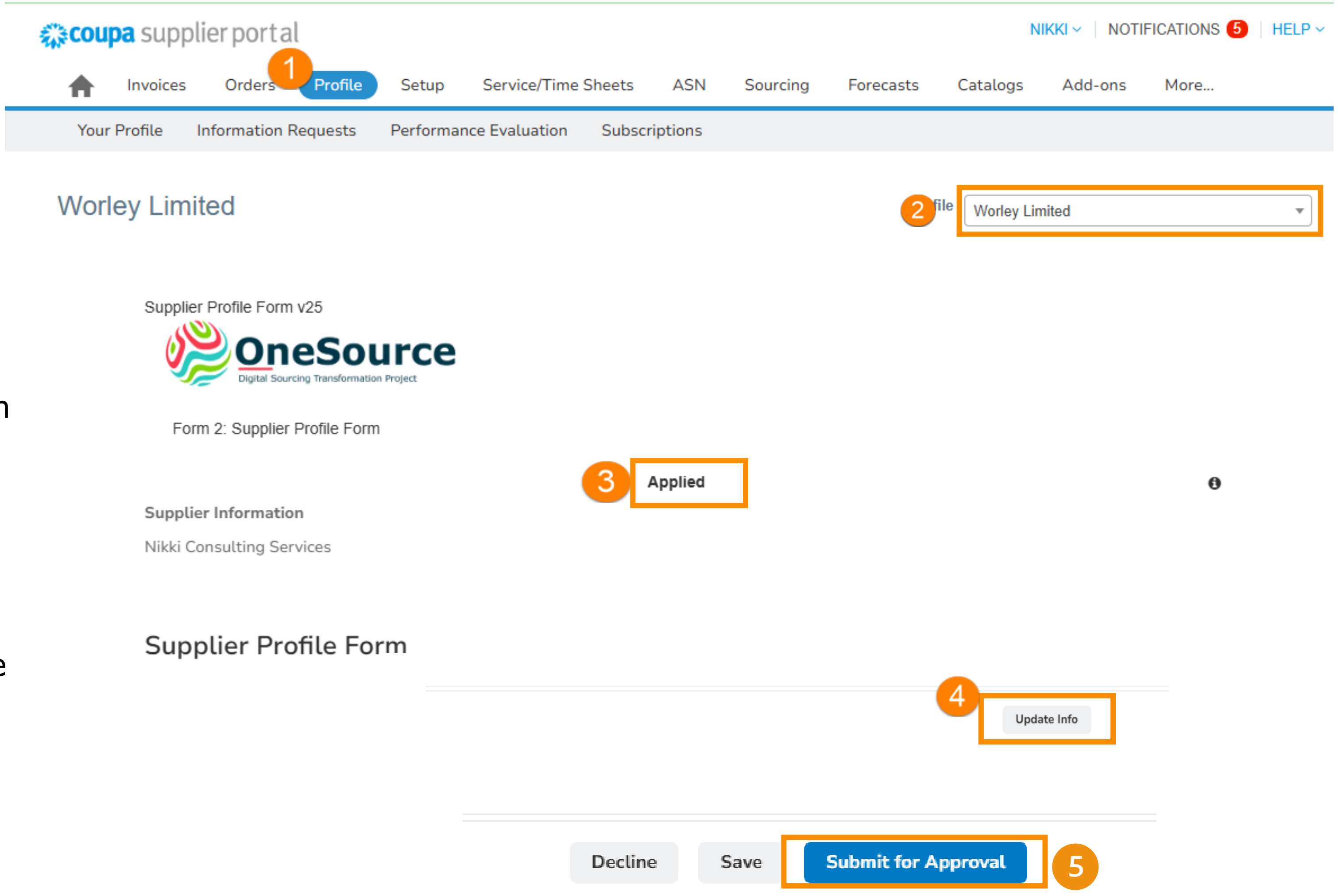
Coupa Supplier Portal | Manage Profile

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

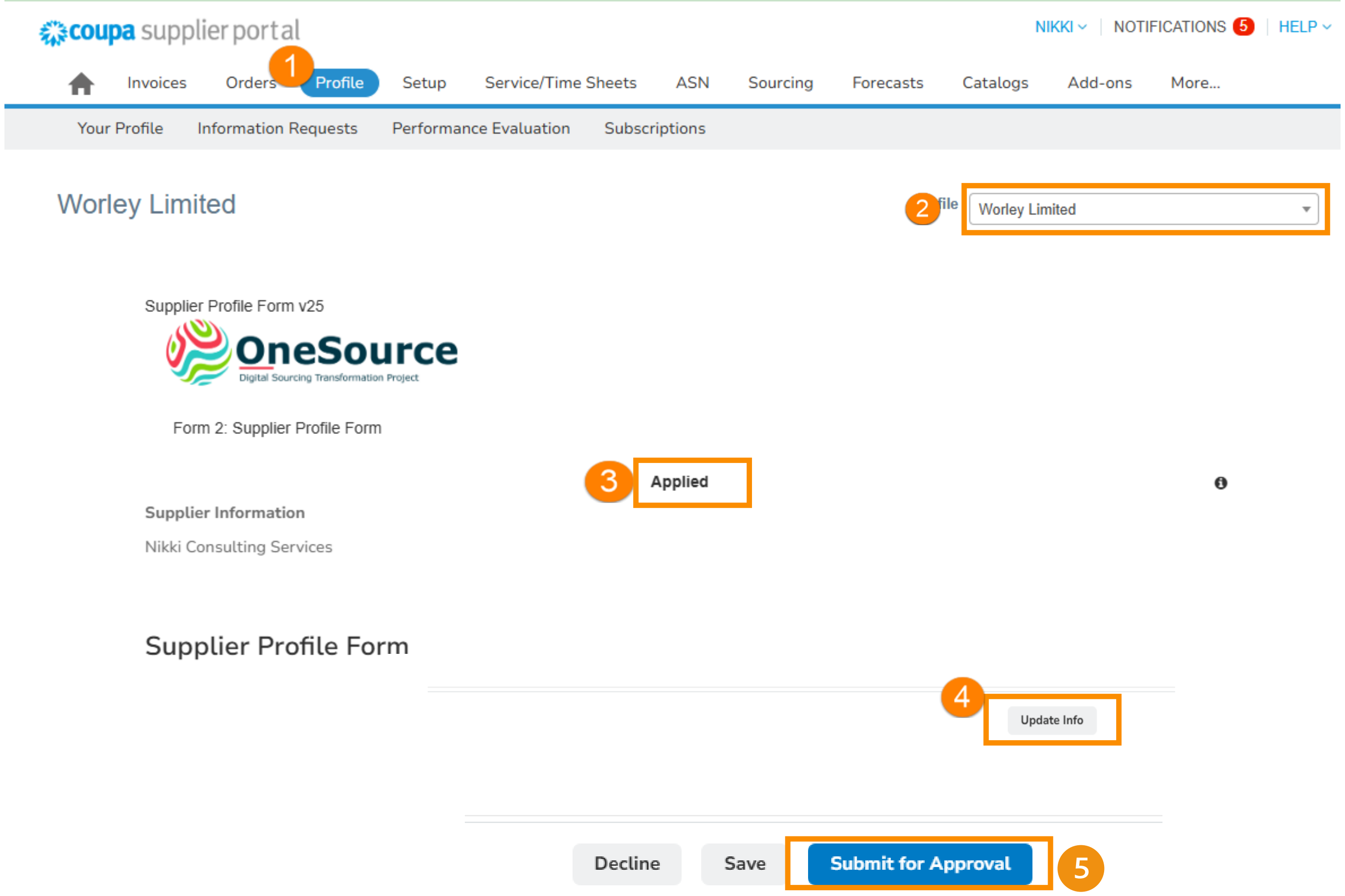
4. Select **Update Info,** the form will then become editable

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 appliable/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**.



Coupa Supplier Portal | Manage Profile

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.

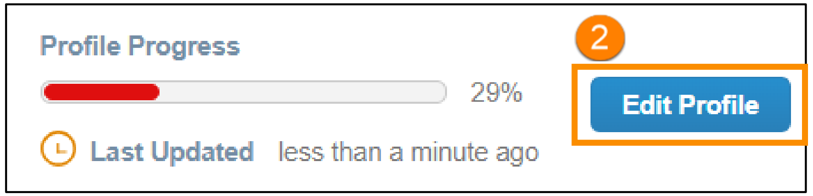
Coupa Supplier Portal | Manage Profile

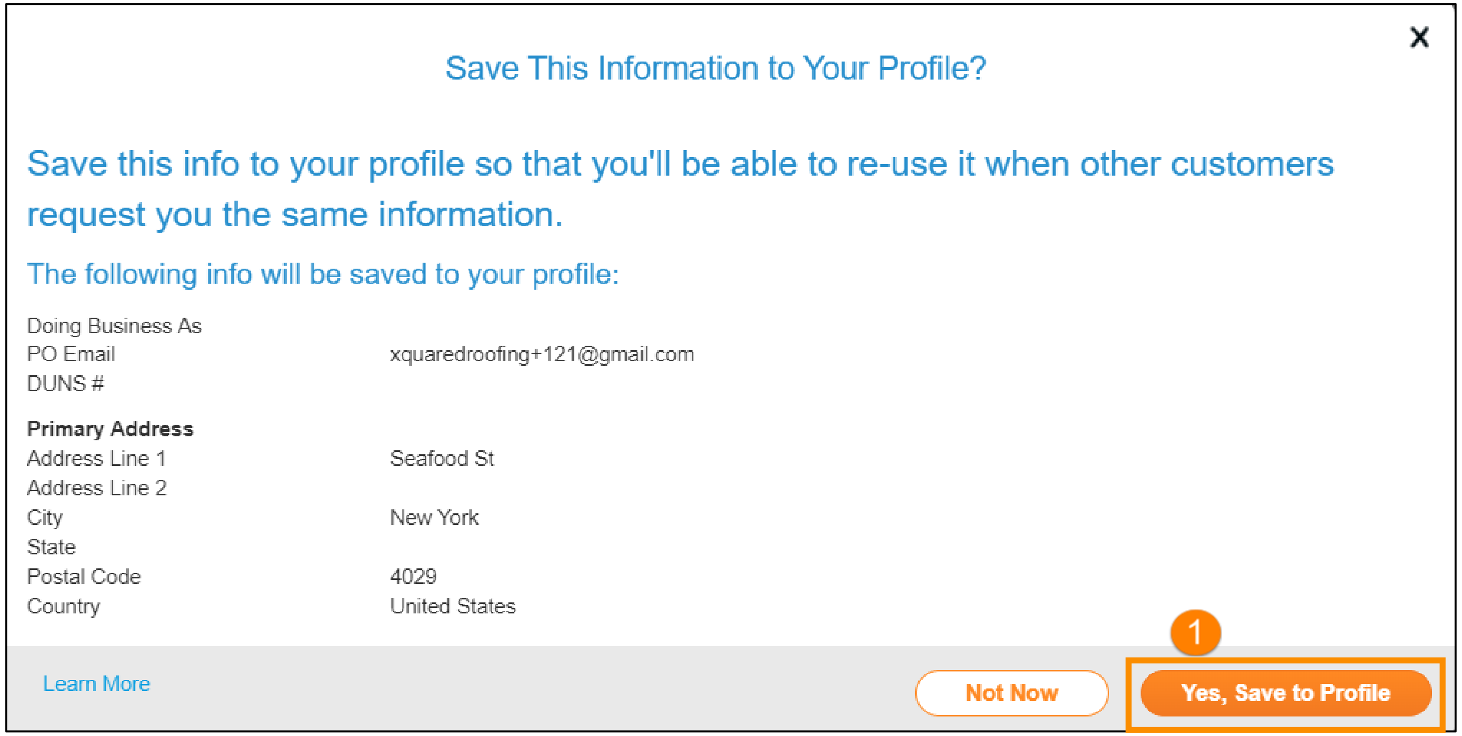
D. Copy to Public Profile

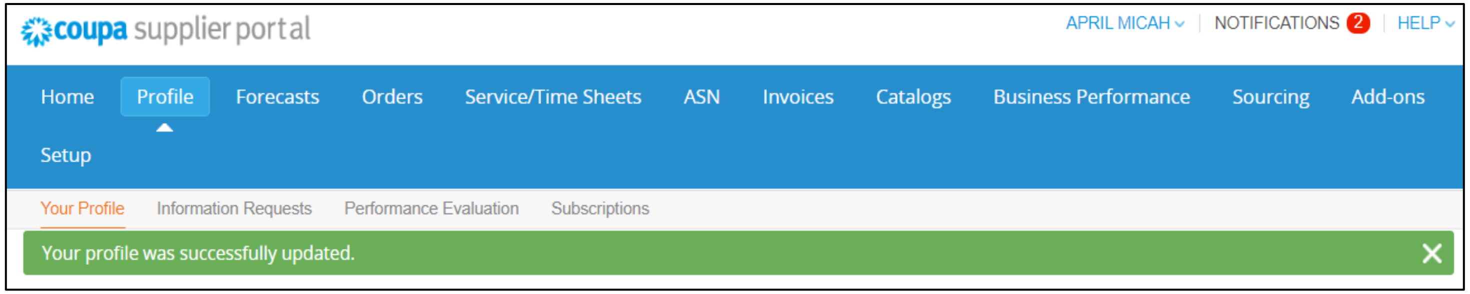
After the update of the New vendor Info, Supplier will be prompted with an option to copy the SIM profile to a Public Profile

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.







COUPA SUPPLIER PORTAL (CSP)

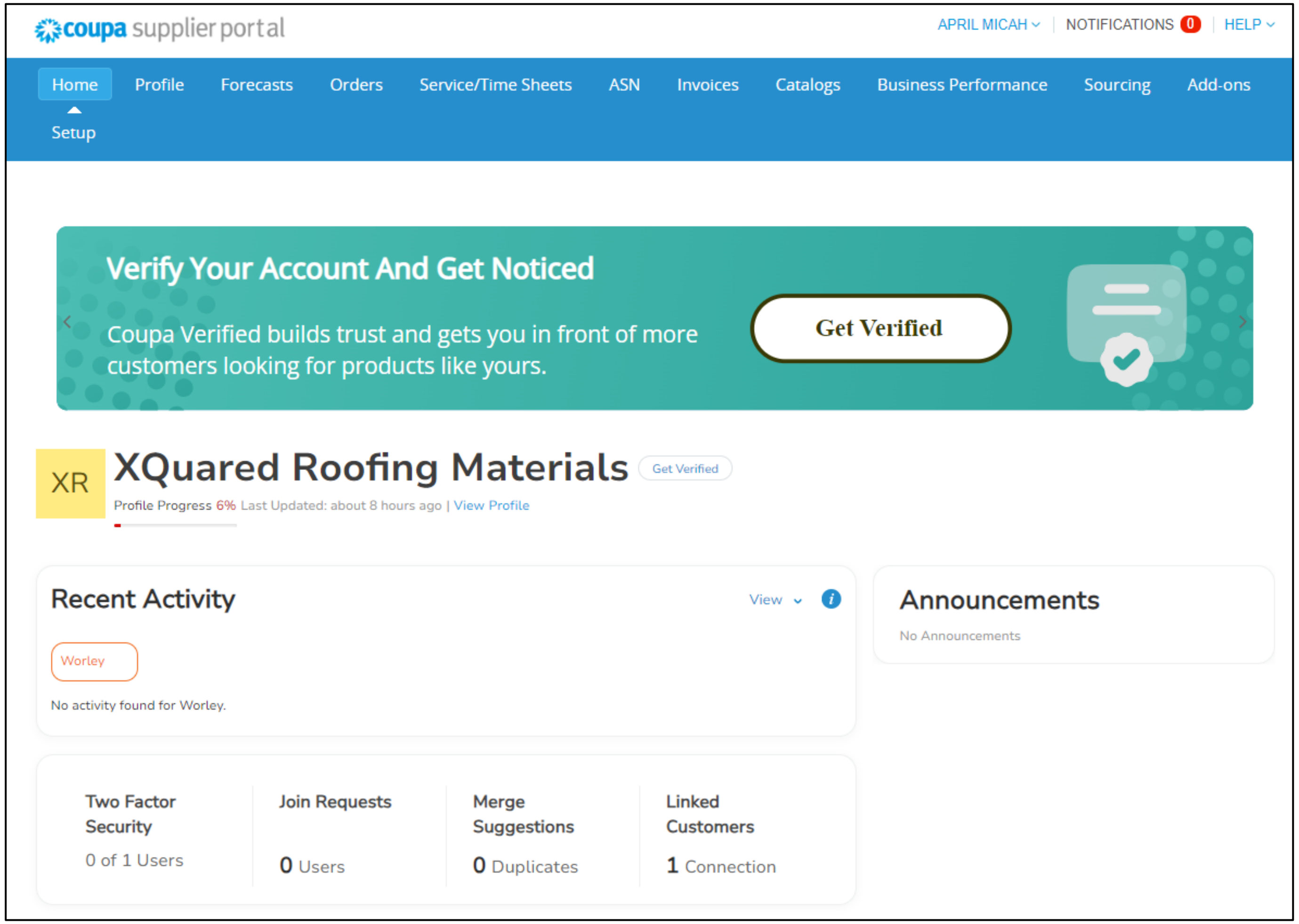
3. Homepage

Coupa Supplier Portal | Homepage

<u>Coupa Homepage – Profile Summary</u>

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.



COUPA SUPPLIER PORTAL (CSP)

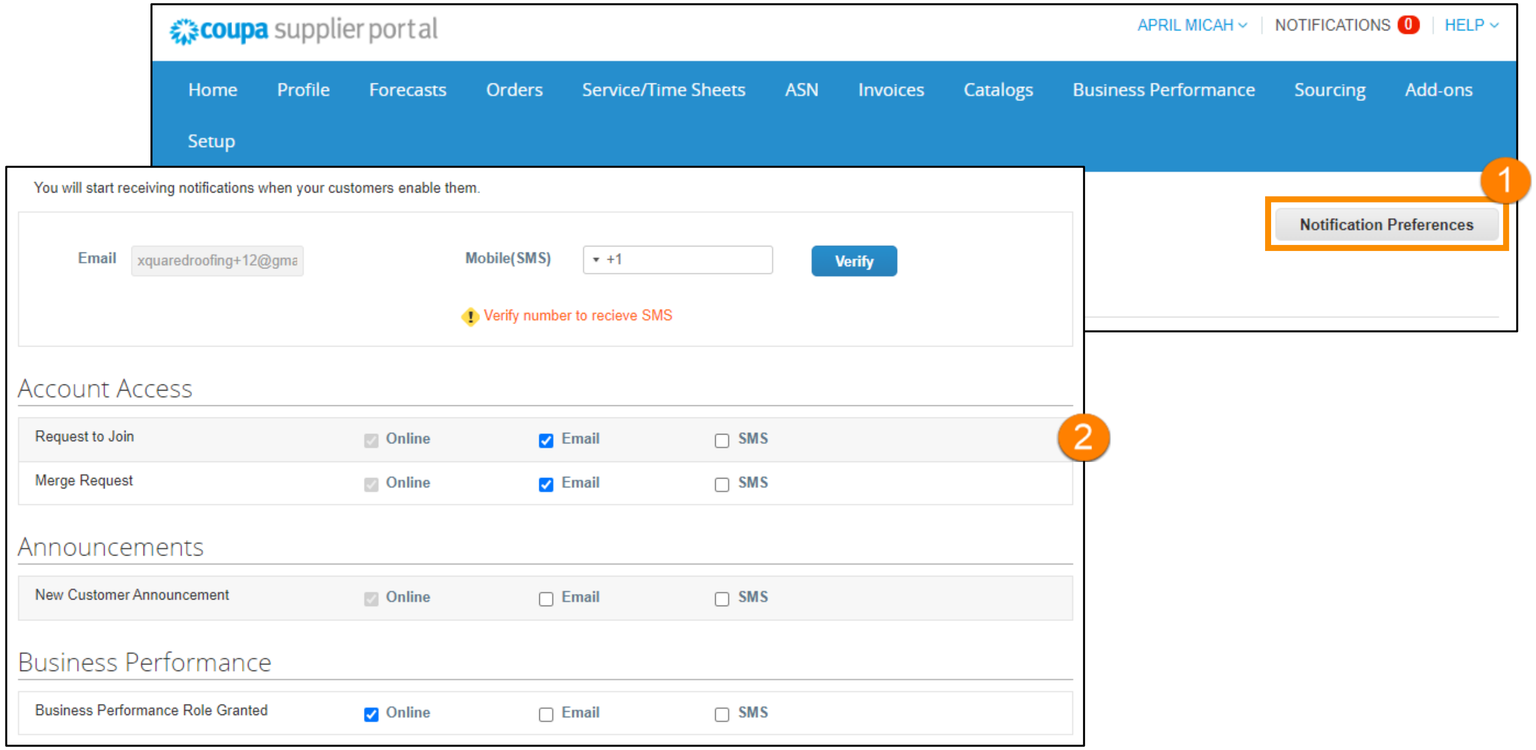
4. Manage Account Settings

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.



Coupa Supplier Portal | My Account

<u>Coupa Security & Two-Factor Authentication</u>

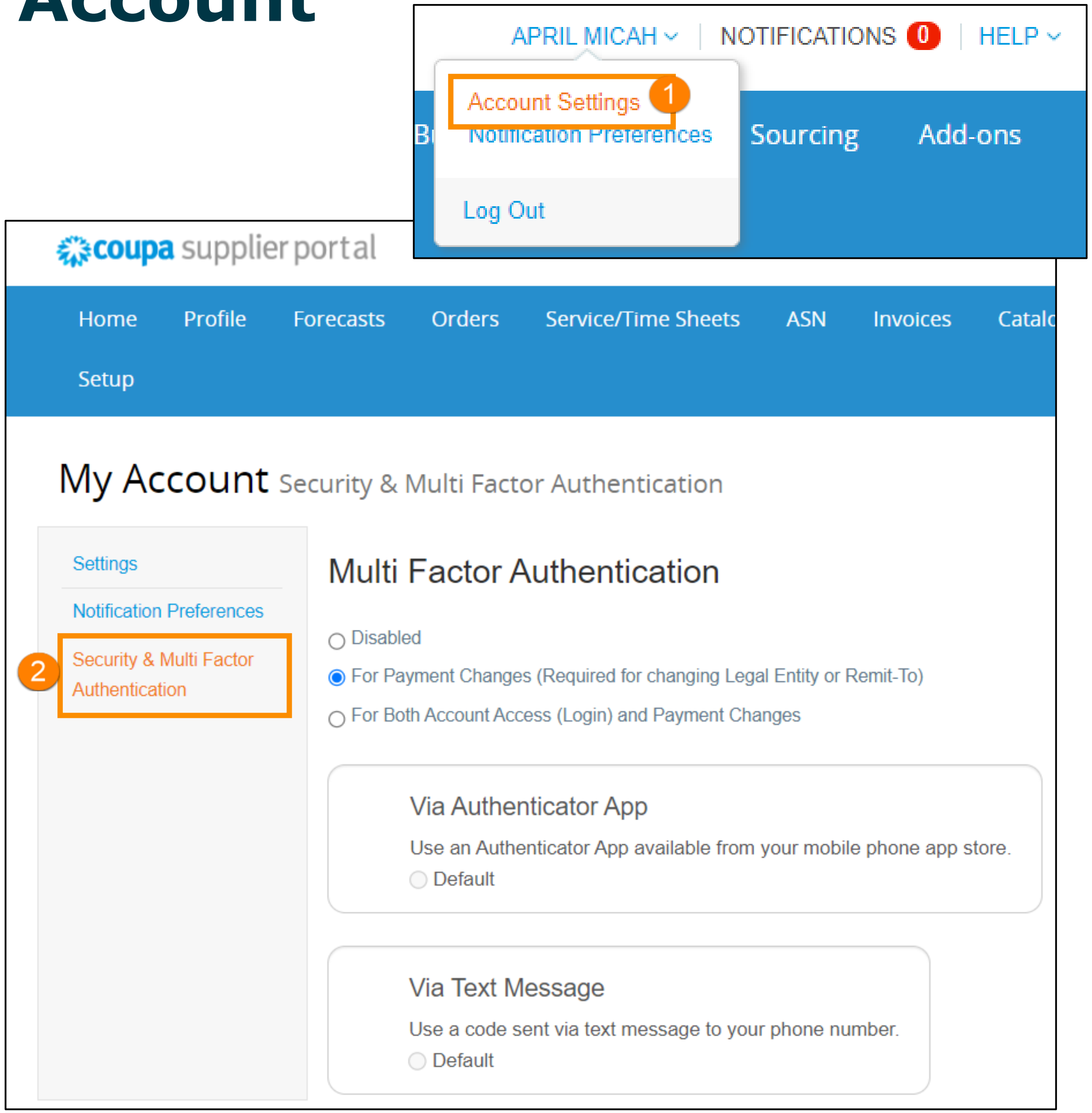
When the Supplier logs in for the first time, they are prompted to enable two-factor authentication.

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**.

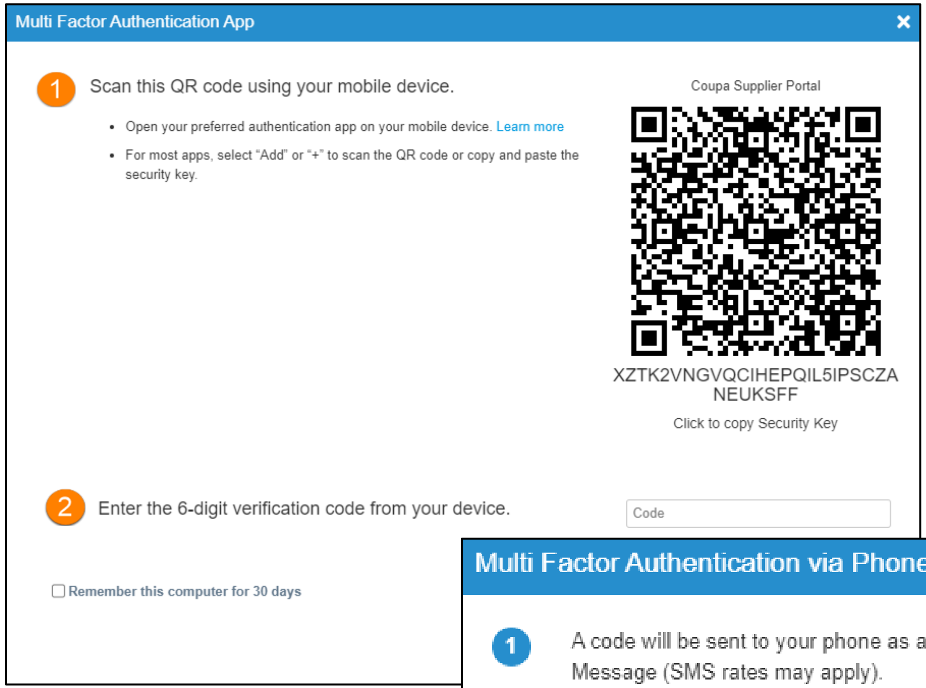


Coupa Supplier Portal | My Account

If Via Authentication App

1. Scan QR using your device.

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

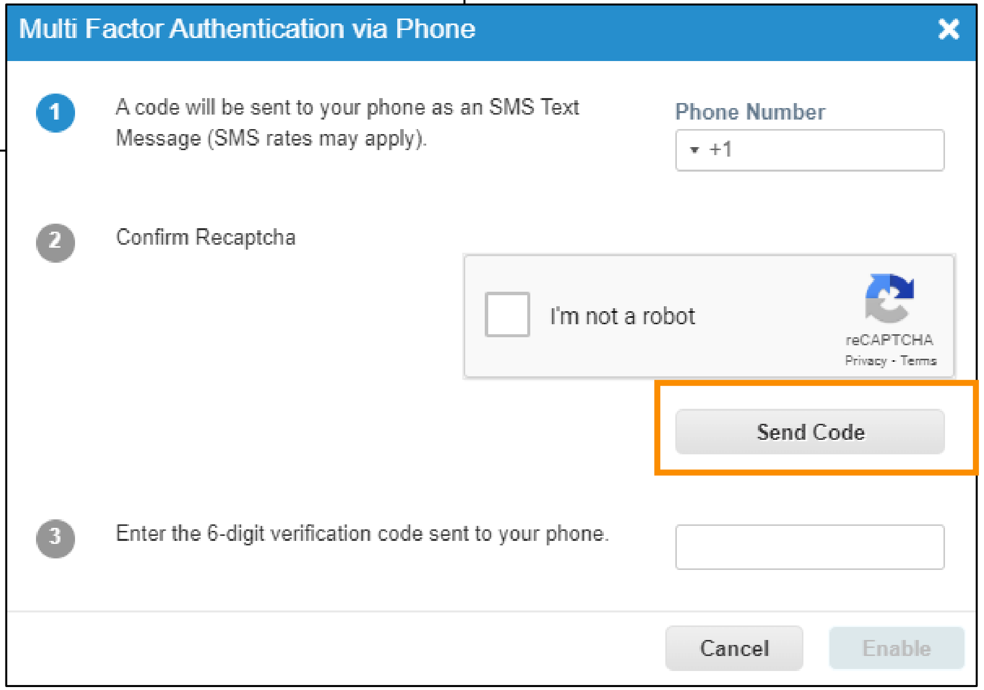


If Via Text Message

1. Enter the Cell Phone Number to receive the SMS notifications.

2. Confirm Recaptcha then click **Send Code**.

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



COUPA SUPPLIER PORTAL (CSP)

5. Admin Setup

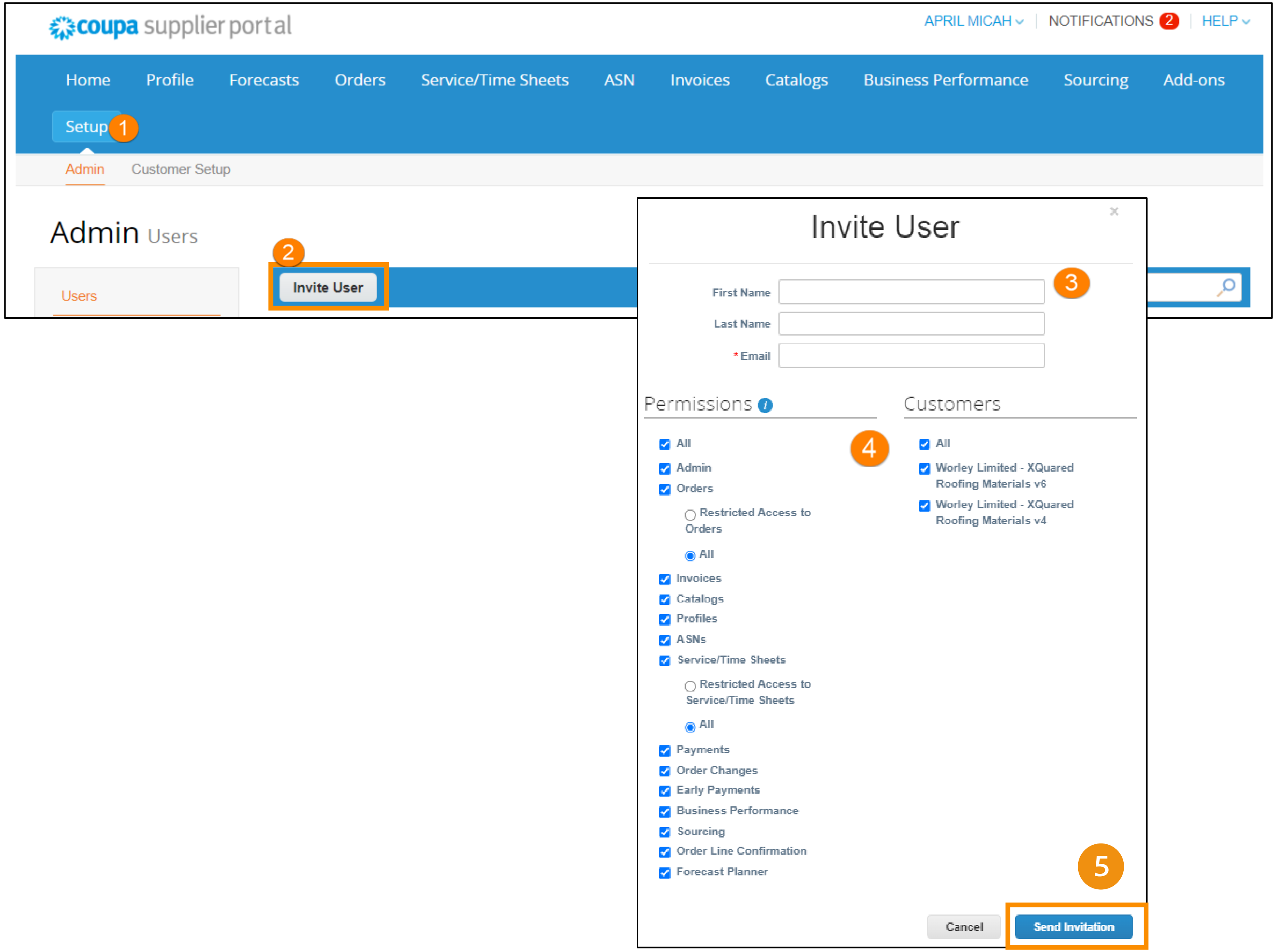
Coupa Supplier Portal | Admin Setup

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**



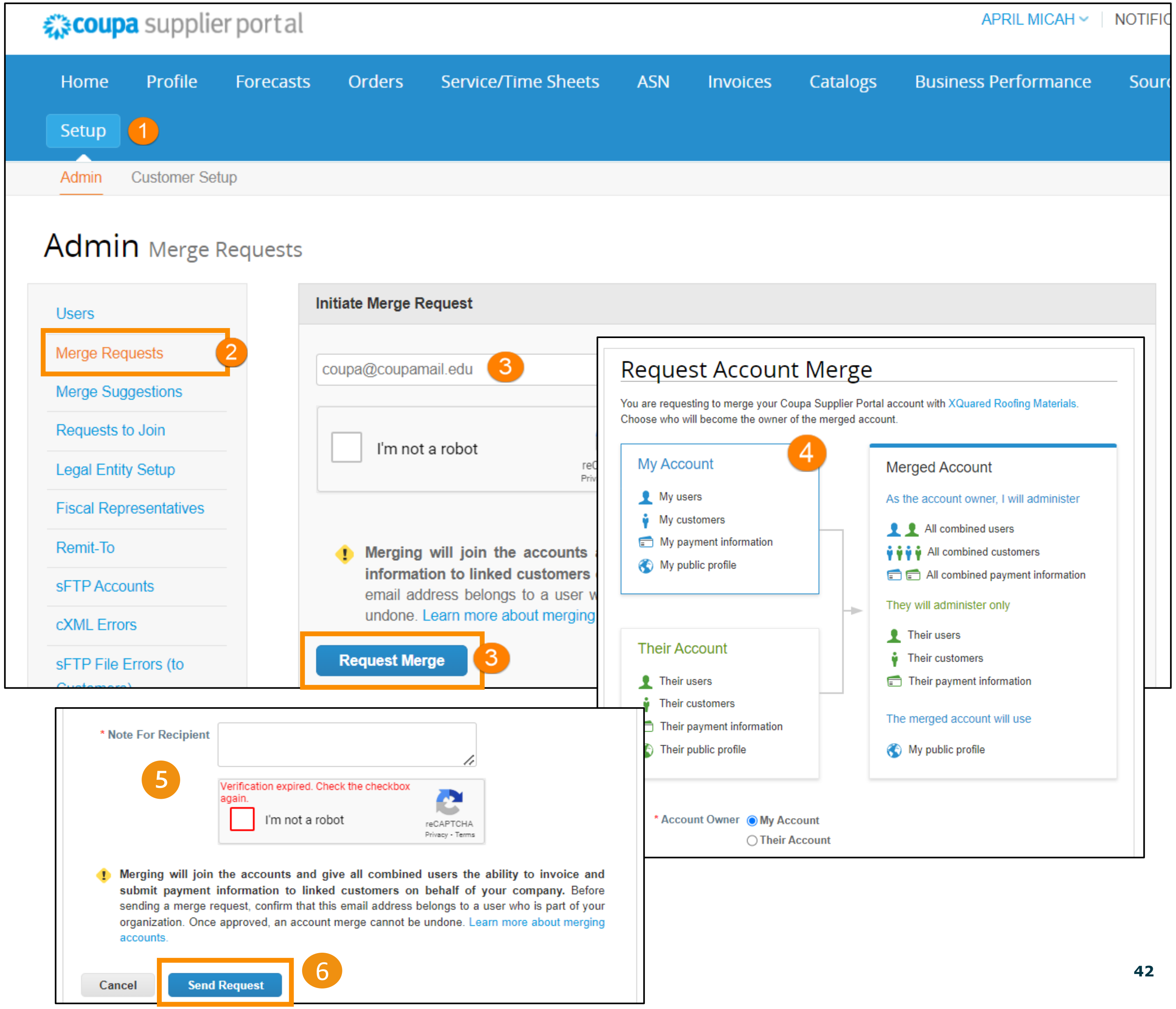
Coupa Supplier Portal | Admin Setup

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**

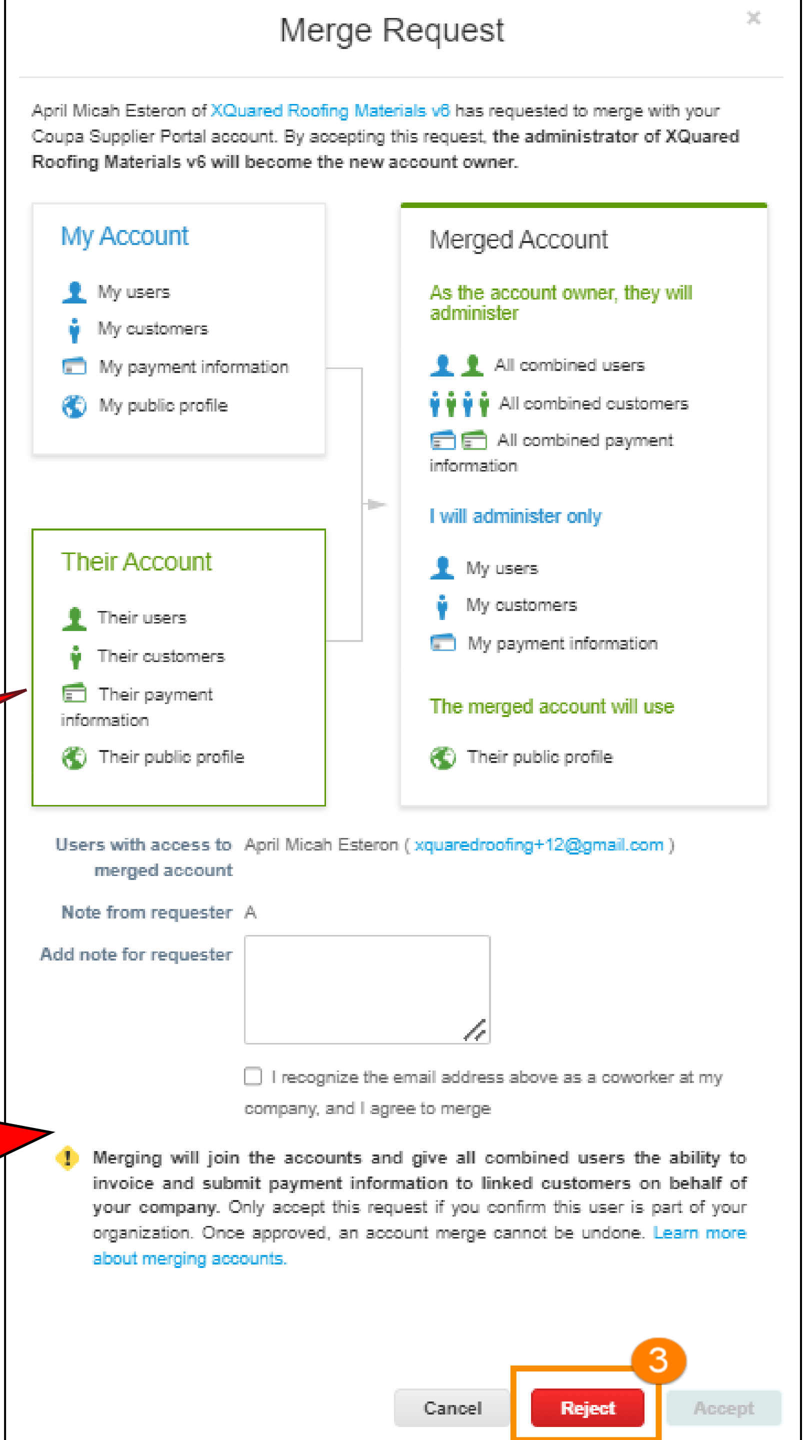


B.1 Respond to Merge Account Request

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.

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.



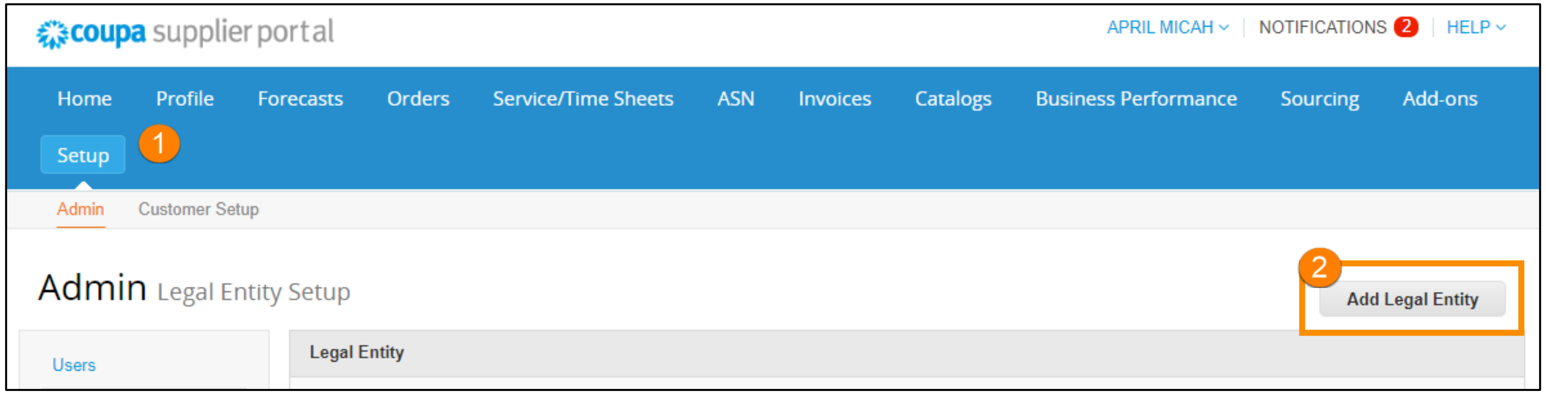
Coupa Supplier Portal | Admin Setup

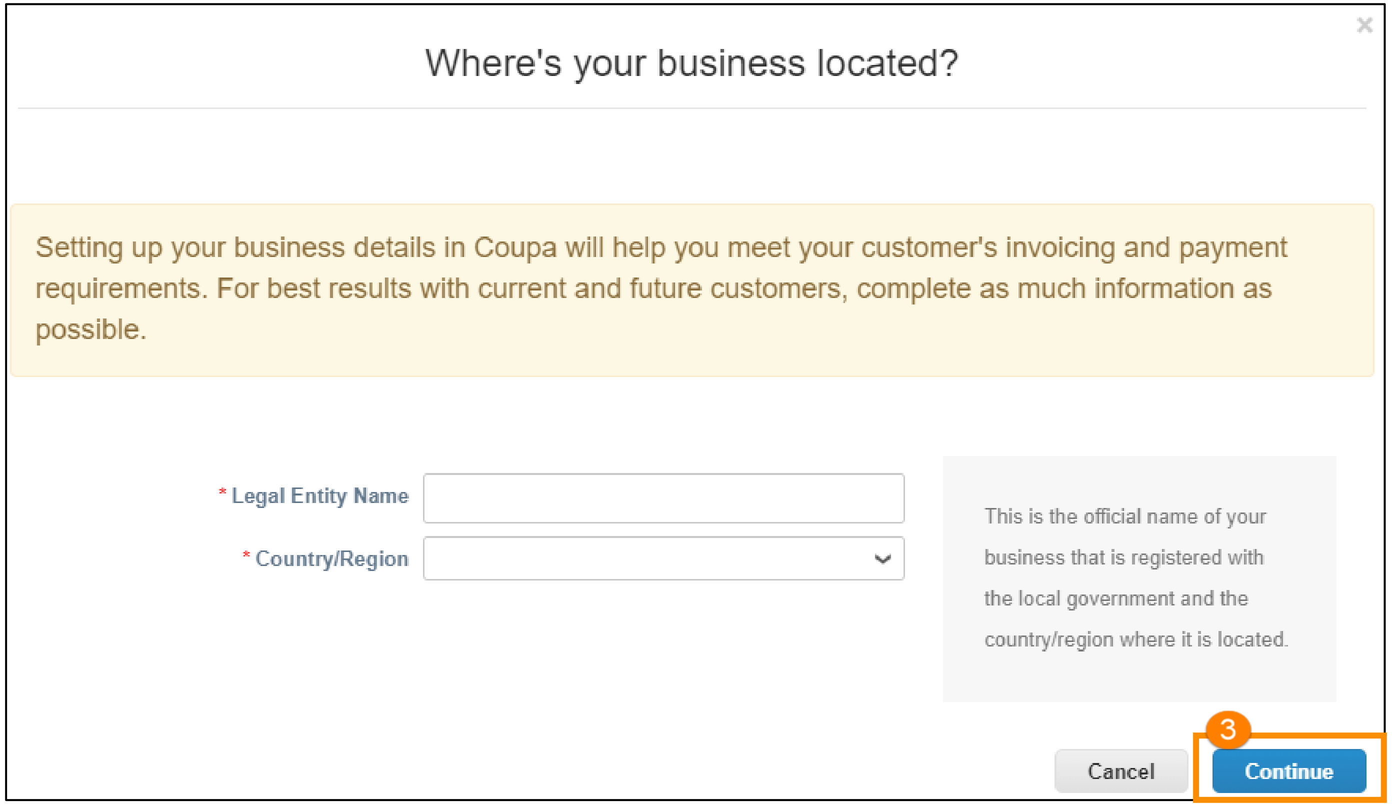
C. Legal Entity

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**.

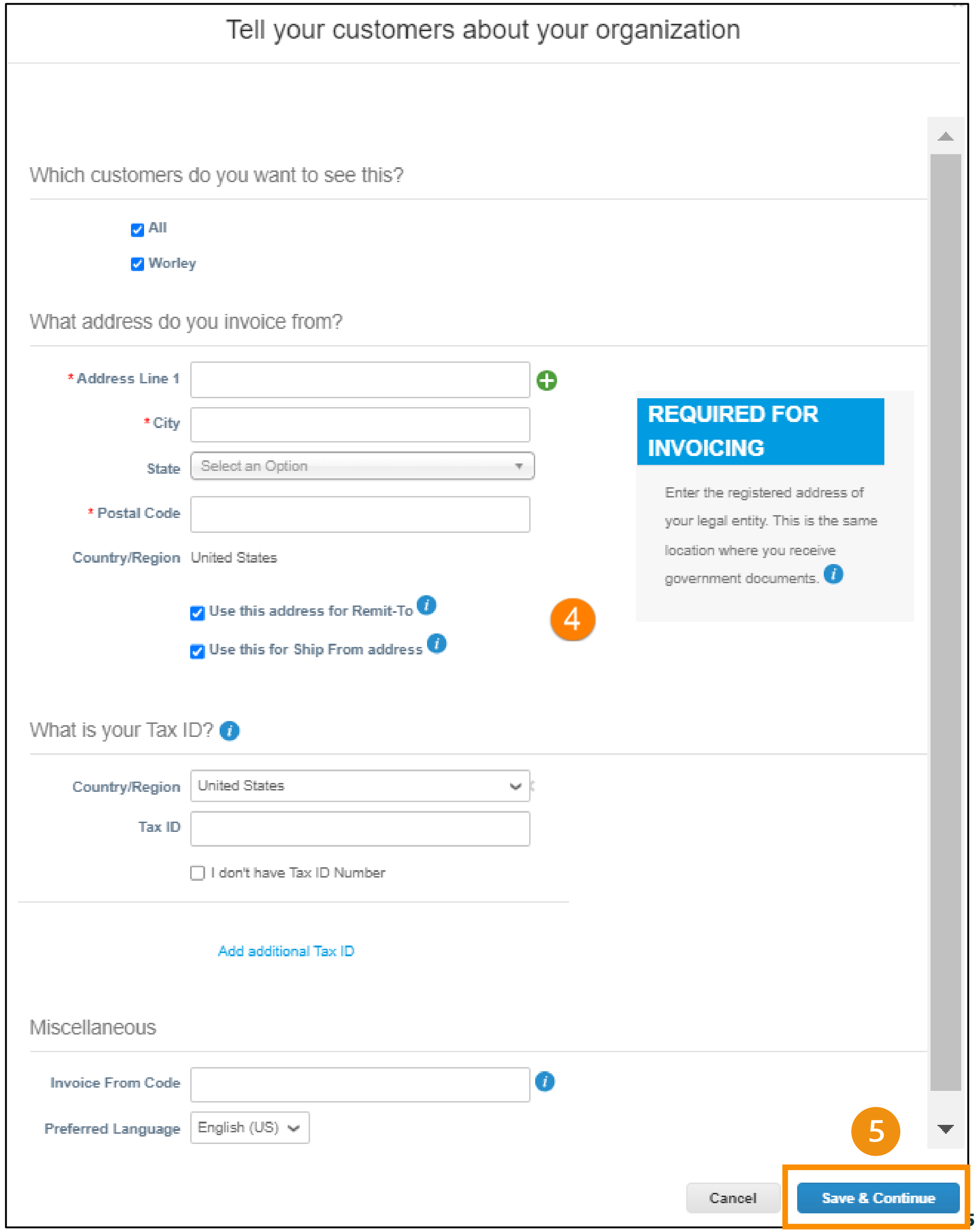




Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

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



Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

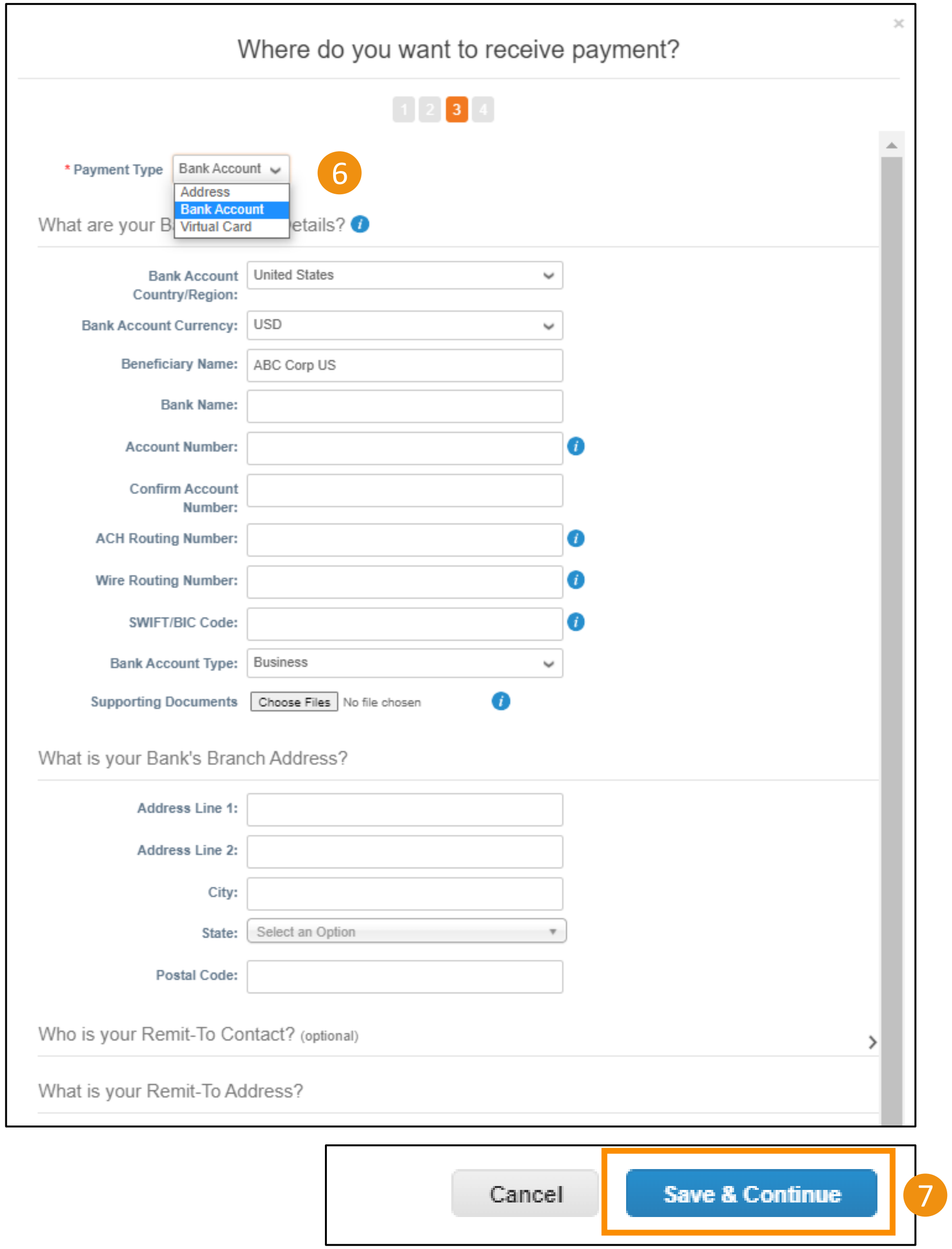
6. On the **Where do you want to receive payment?** page, select how you'd like to be paid in **the Payment Type** selector

   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.

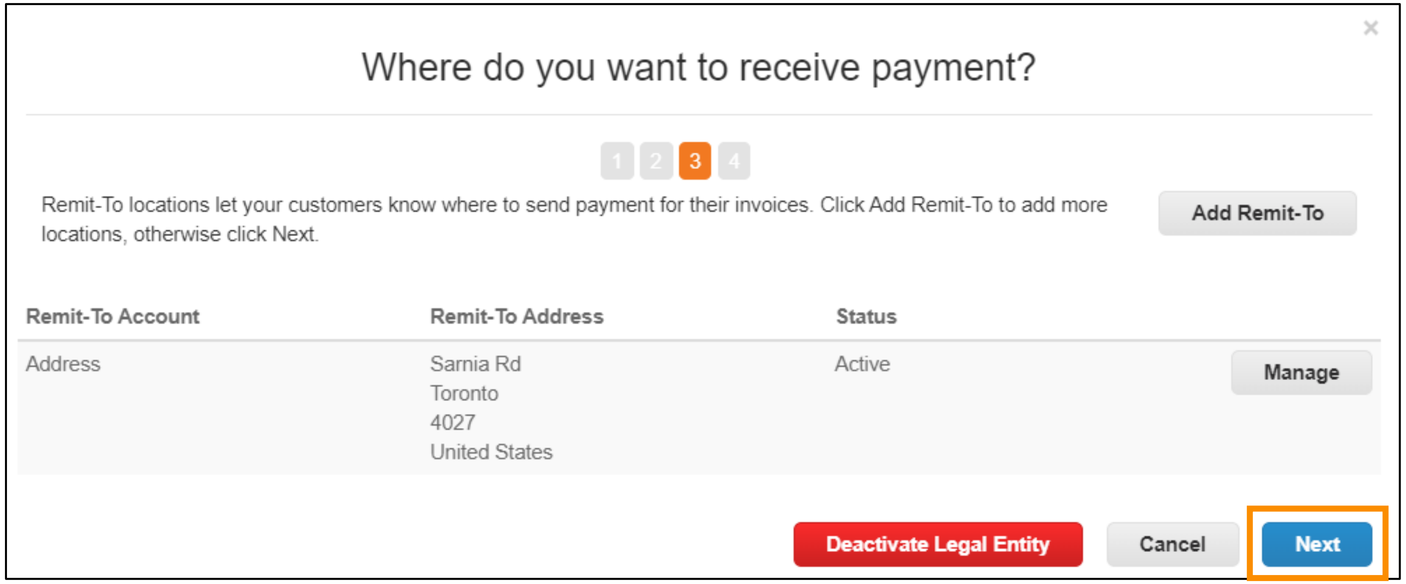
7. Select **Save & Continue**.



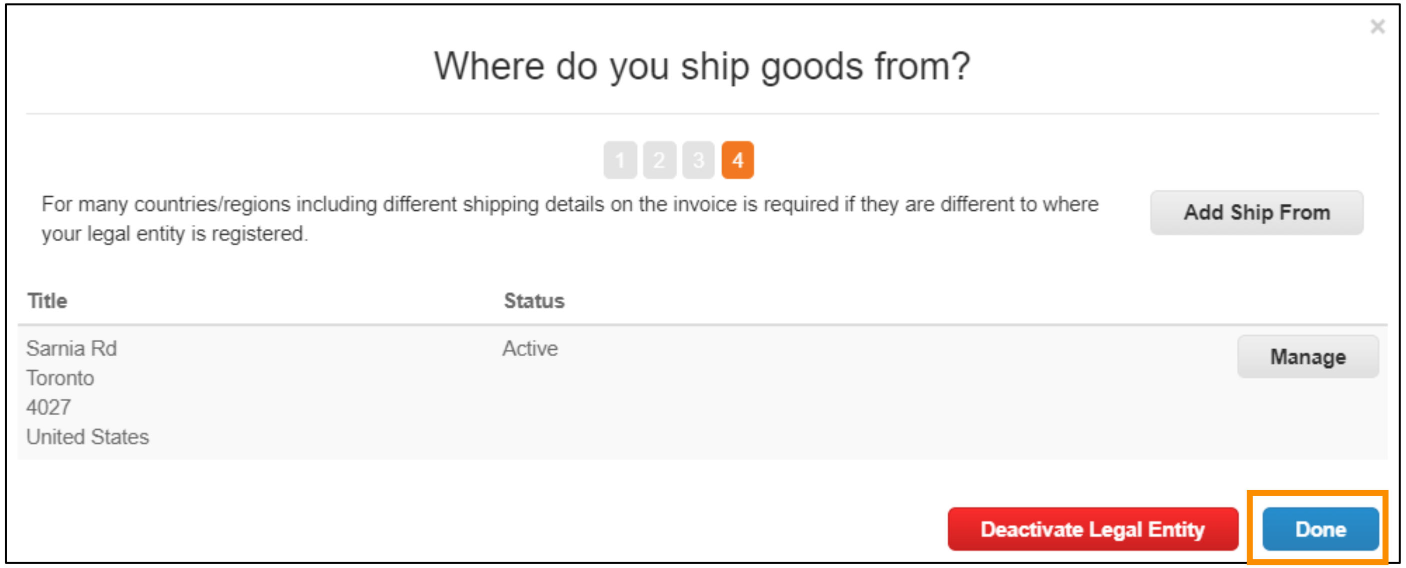
Coupa Supplier Portal | Admin Setup

C.1 Add Legal Entity (CONTINUED)

8. 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**.



9. 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**.

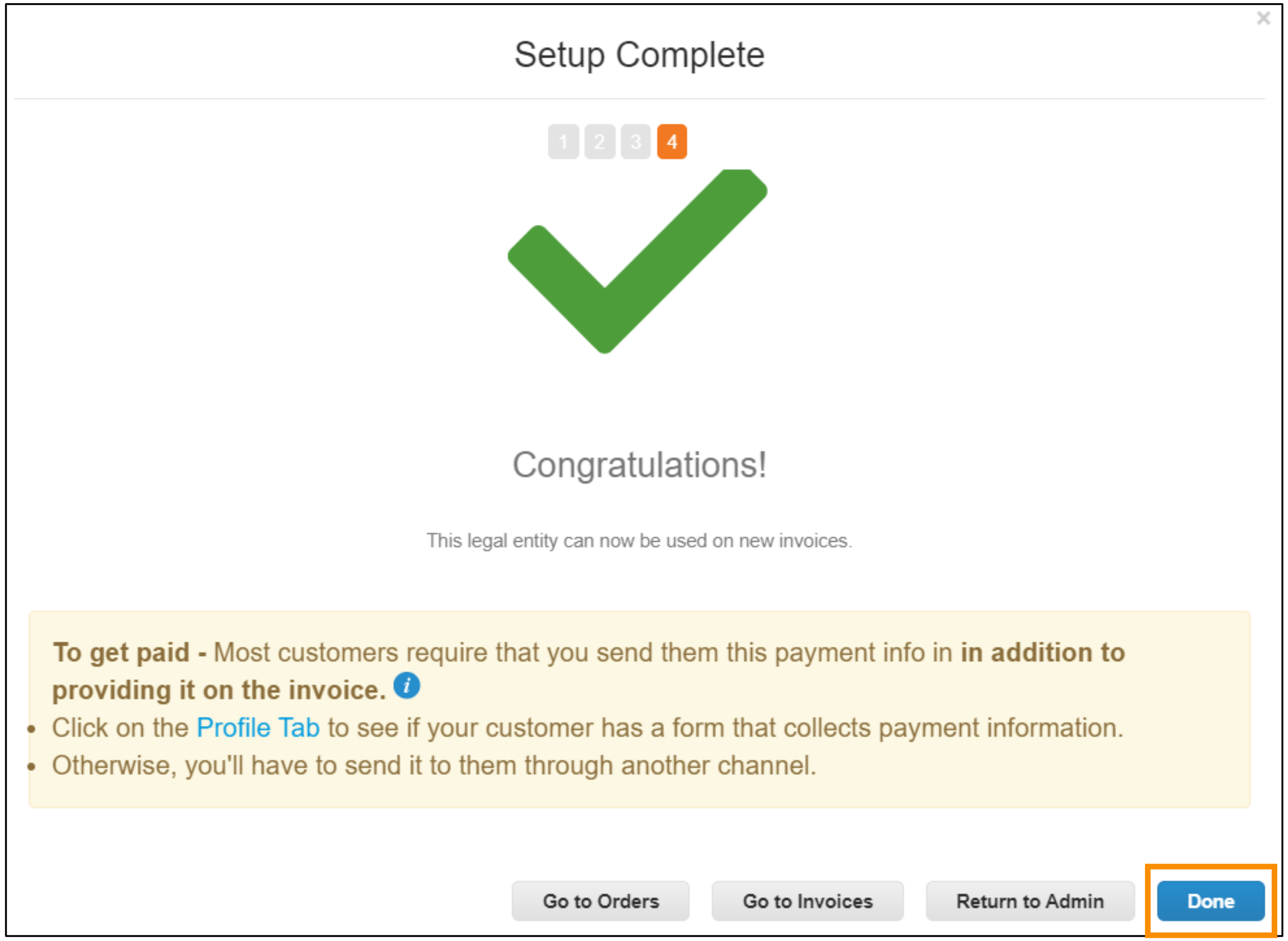


Coupa Supplier Portal | Admin Setup

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.

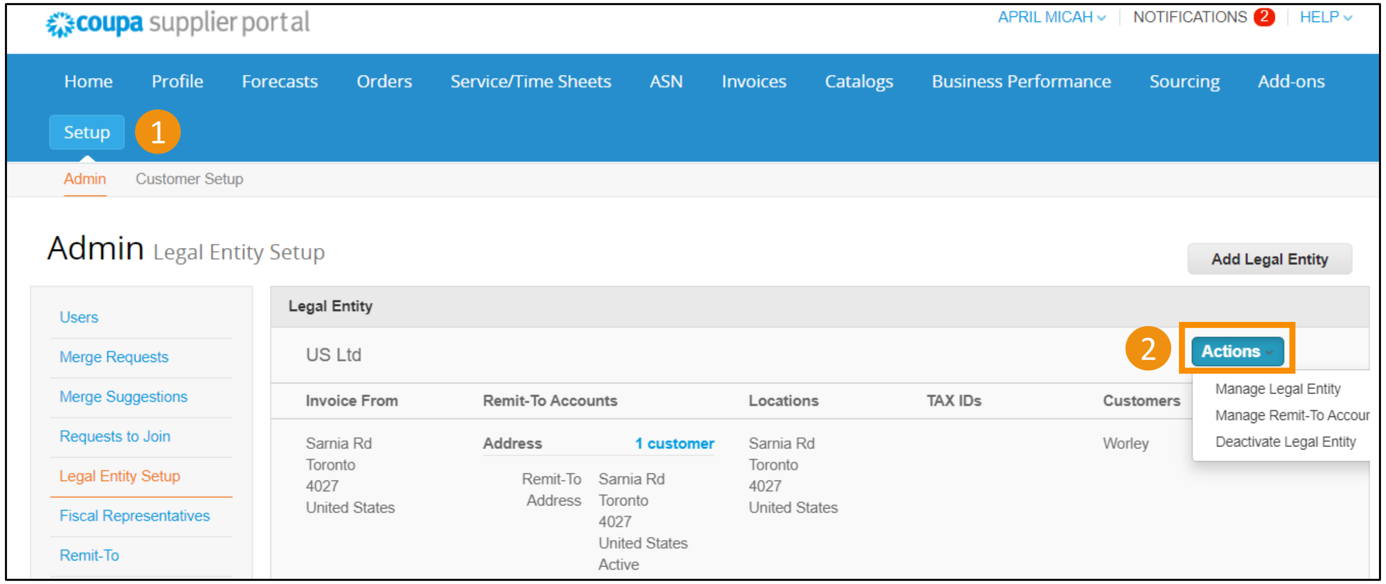
    Select whether you'd like to go to Orders, Invoices, or Return to Admin or select Done to return to the Legal Entities page.



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.

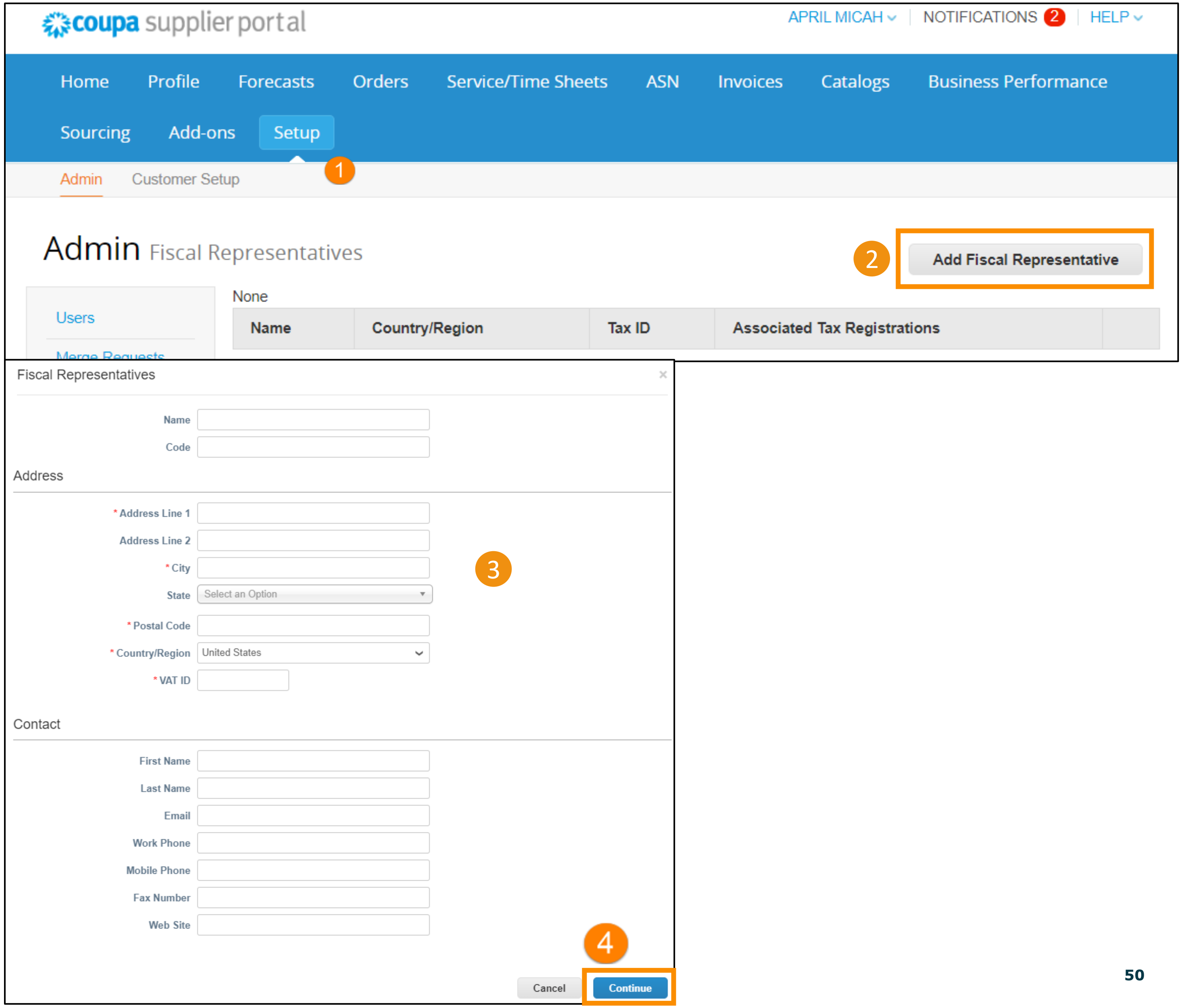
Coupa Supplier Portal | Admin Setup

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

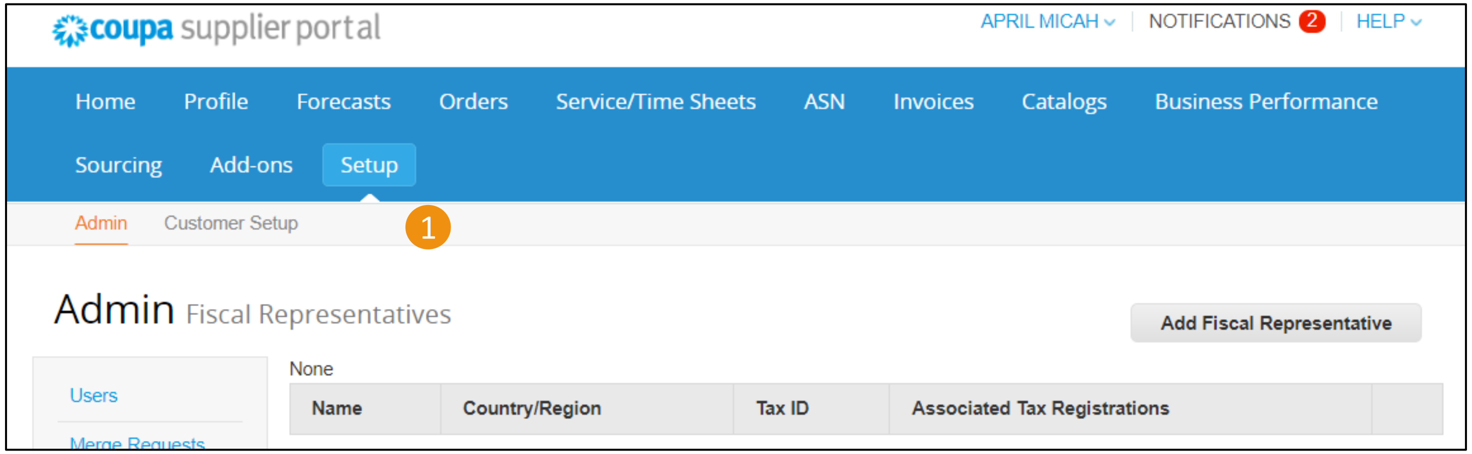
1. Go to **Setup** > **Admin** > **Fiscal Representatives**.
2. Select **Add Fiscal Representative**.
3. In the appearing window, fill in at least the mandatory Address fields (marked with a red asterisk): address line 1, city, postal code, country/region, and VAT ID.
4. Select **Continue**.

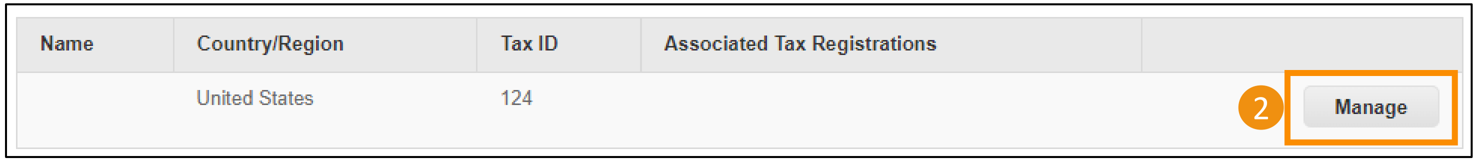


Coupa Supplier Portal | Admin Setup

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**.



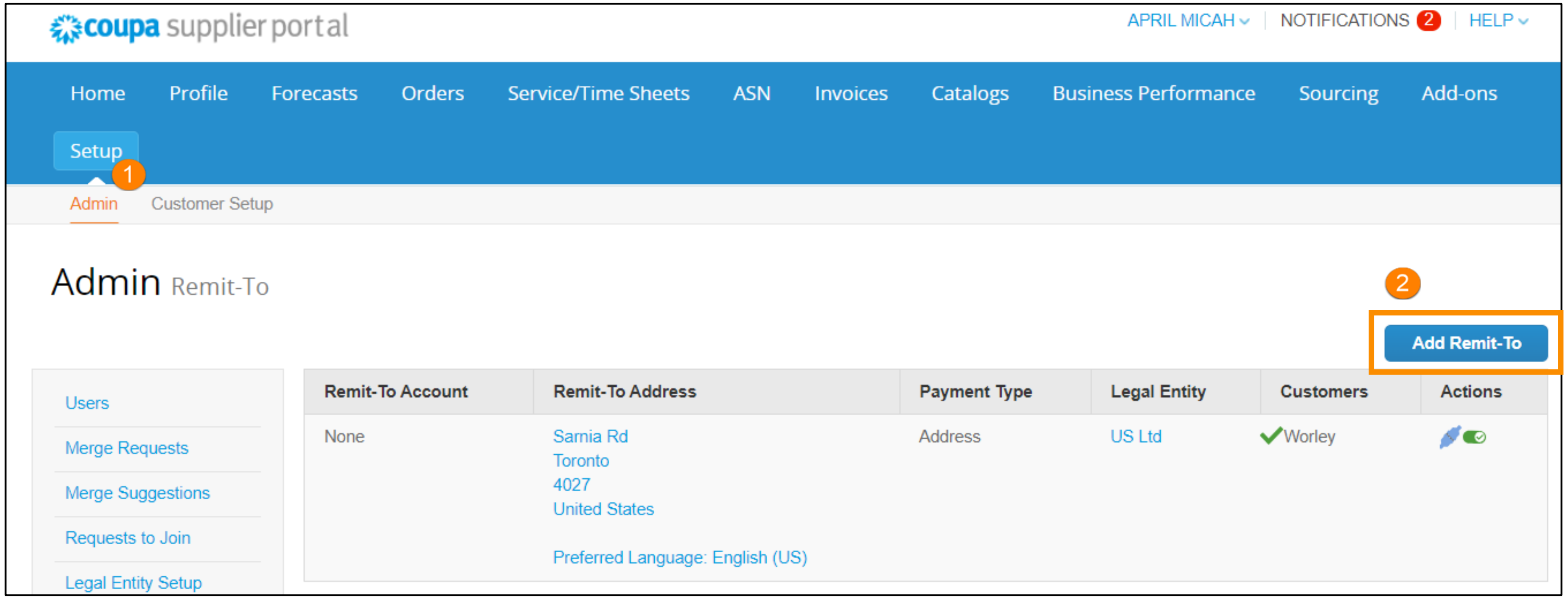


Coupa Supplier Portal | Admin Setup

E. Remit To

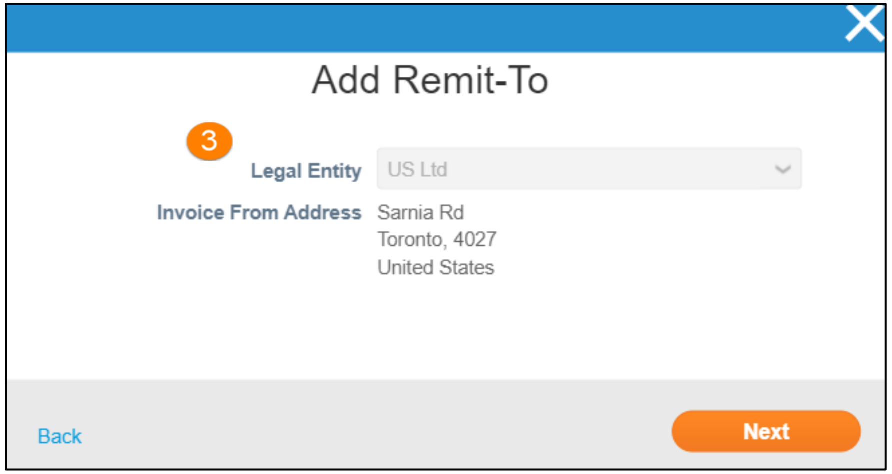
Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information.

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



E.1 Add a Remit-to

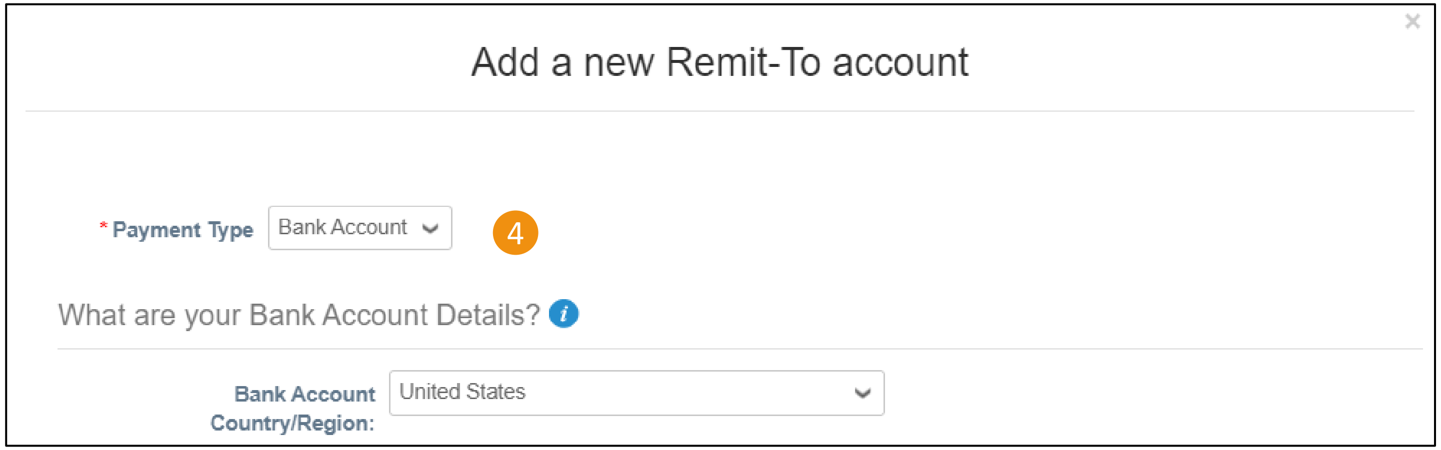
1. Go to **Setup** > **Admin** > **Remit-To**.
2. Select **Add Remit-To**.
3. In the Add Remit-To window that appears, select the legal entity you want your remit-to associated with. If only one legal entity is active, it is selected by default, and you cannot change it.



Coupa Supplier Portal | Admin Setup

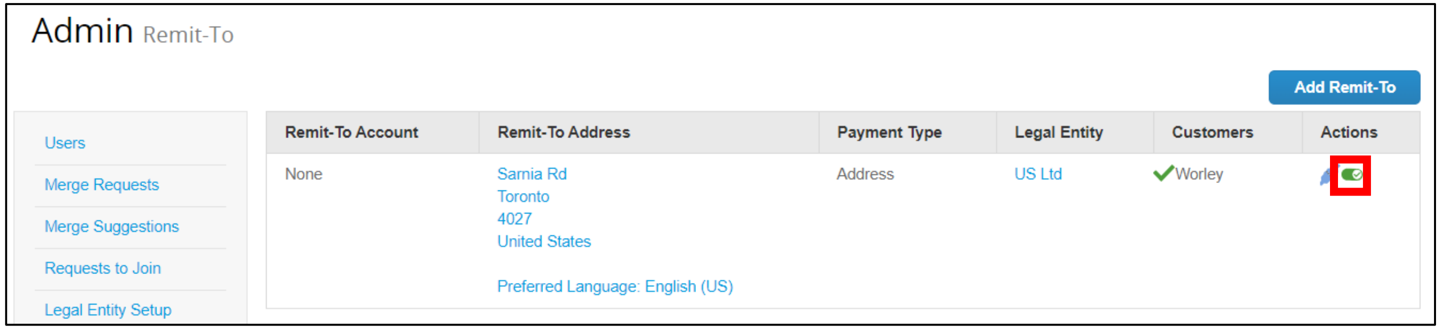
E.1 Add a Remit-to (CONTINUED)

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.



E.2 Deactivate a Remit-to

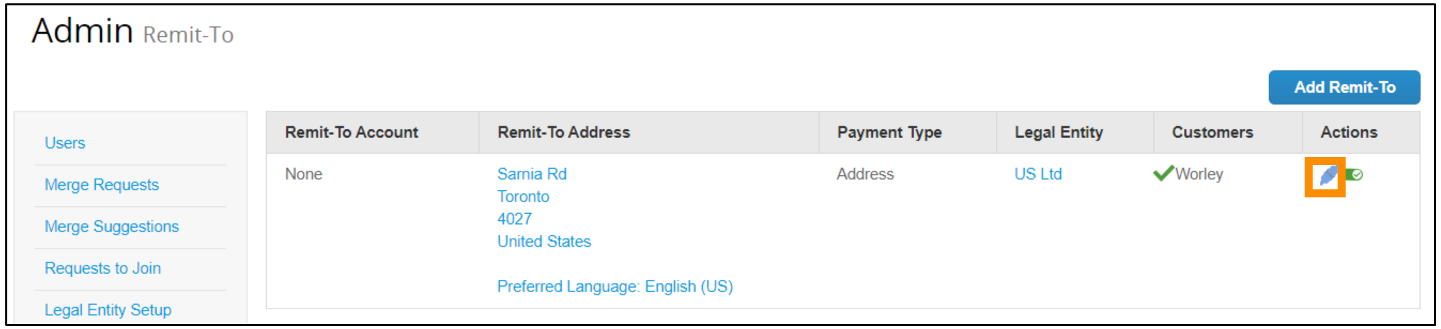
1. Go to **Setup** > **Admin** > **Remit-To.**
2. In the Actions column, select **Disable.**

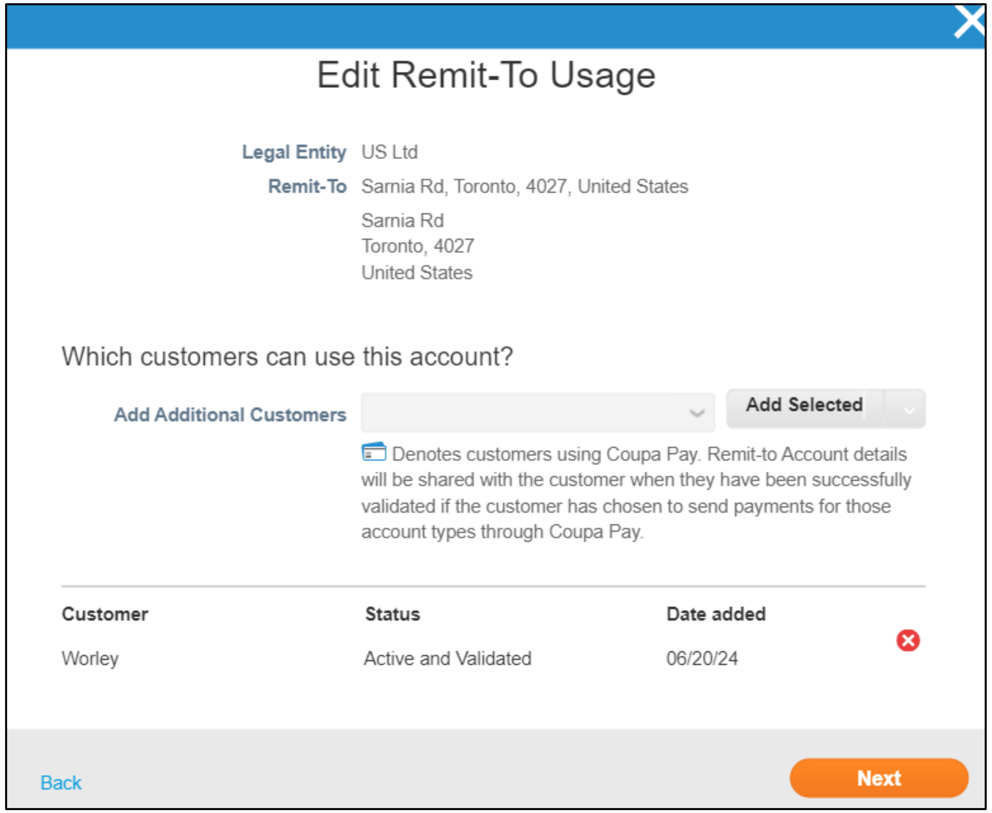


Coupa Supplier Portal | Admin Setup

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.



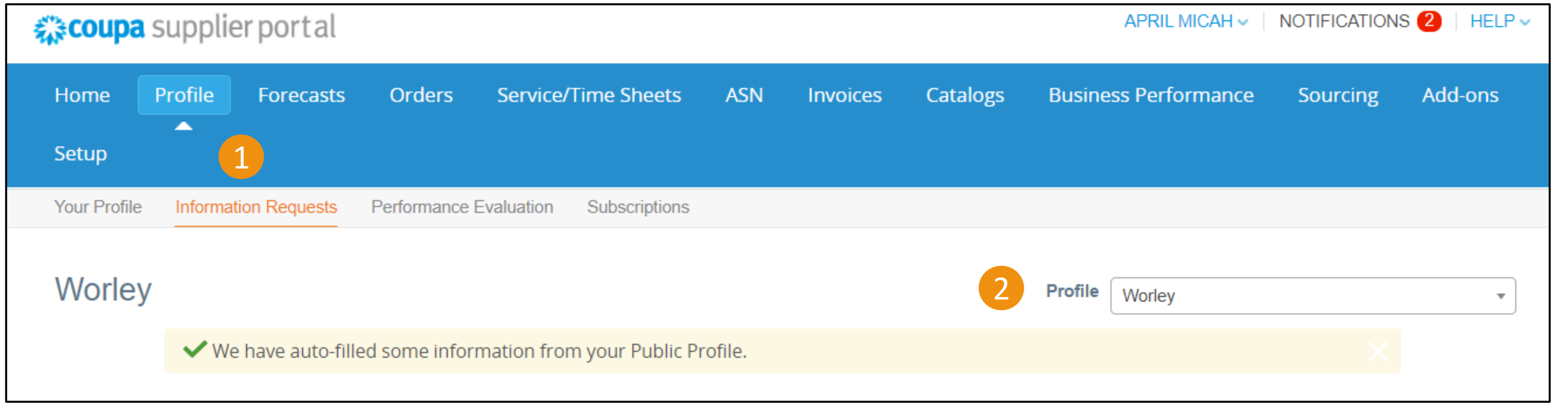


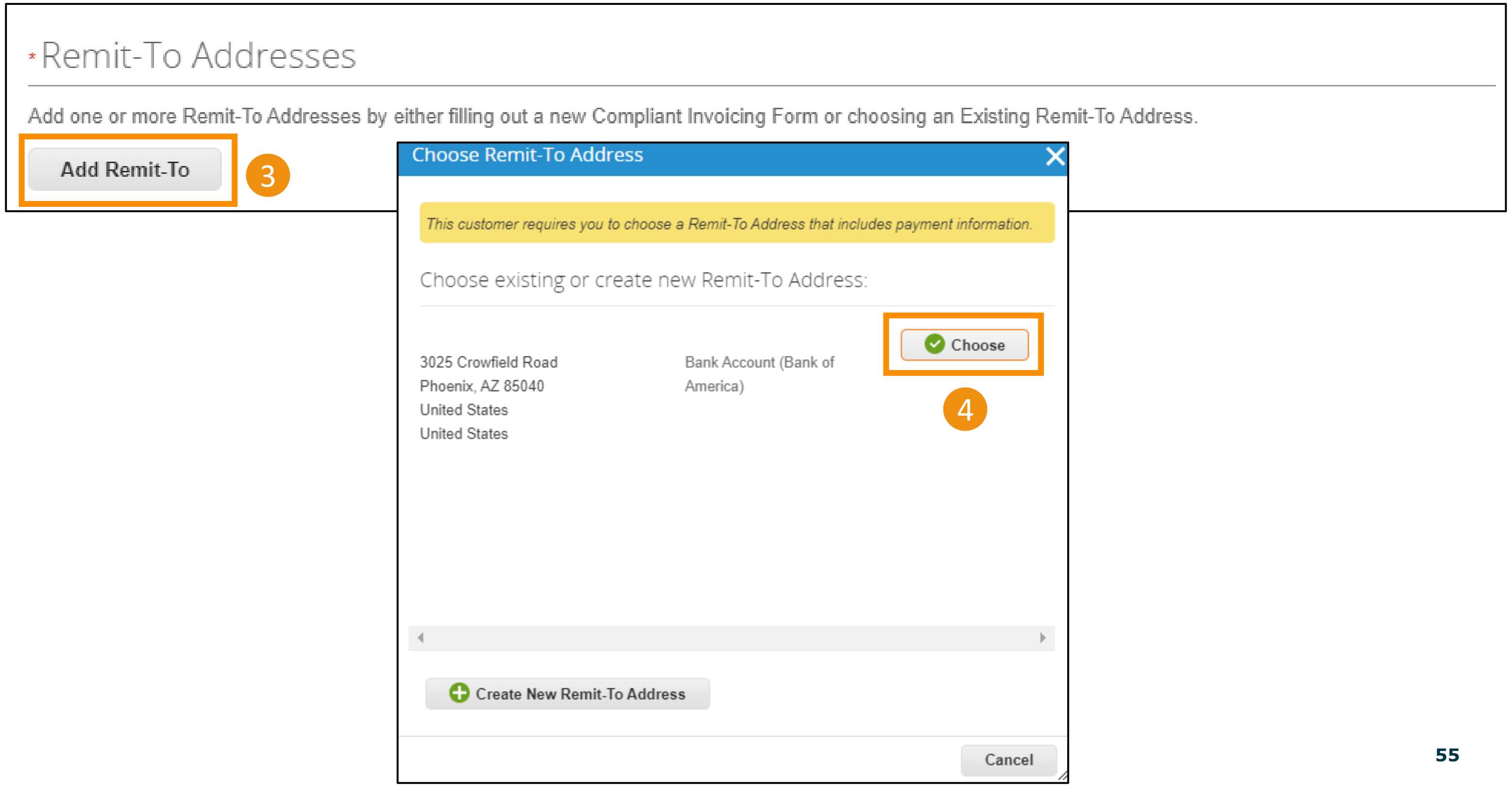
Coupa Supplier Portal | Admin Setup

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)

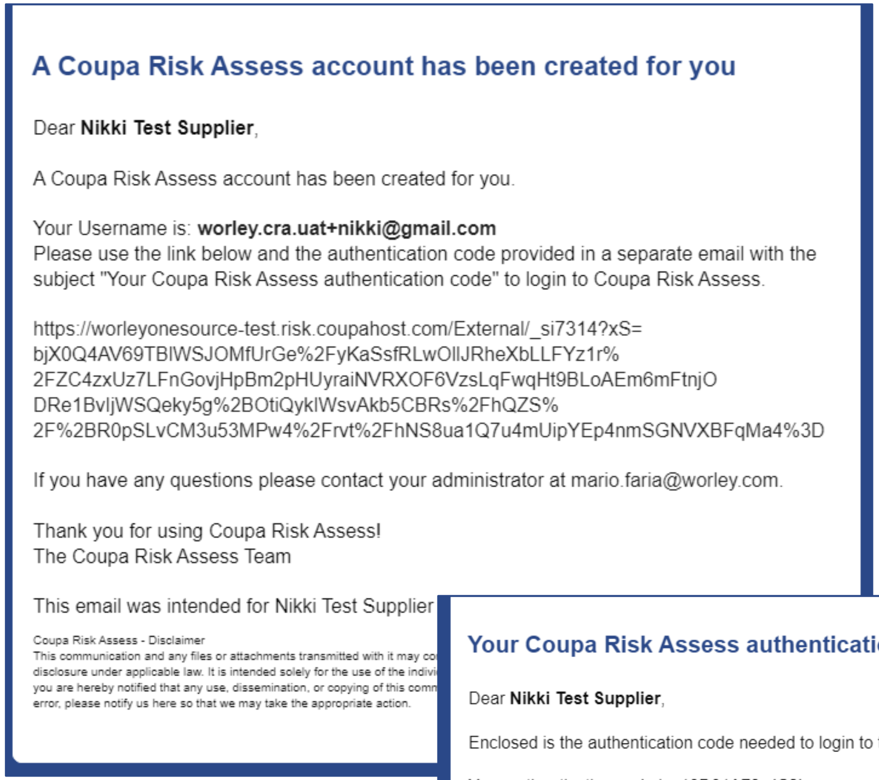
1. Introduction (CRA Evaluation Invitations)

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.coupahost.com/External/_si7314?xS=
bjX0Q4AV69TBlWSJOMfUrGe%2FyKaSsfRLwOllJRheXbLLFYz1r%
2FZC4zxUz7LFnGovjHpBm2pHUyraiNVRXOF6VzsLqFwqHt9BLoAEm6mFtnjO
DRe1BvljWSQeky5g%2BOtiQyklWsvAkb5CBRs%2FhQZS%
2F%2BR0pSLvCM3u53MPw4%2Frvt%2FhNS8ua1Q7u4mUipYEp4nmSGNVXBFqMa4%3D

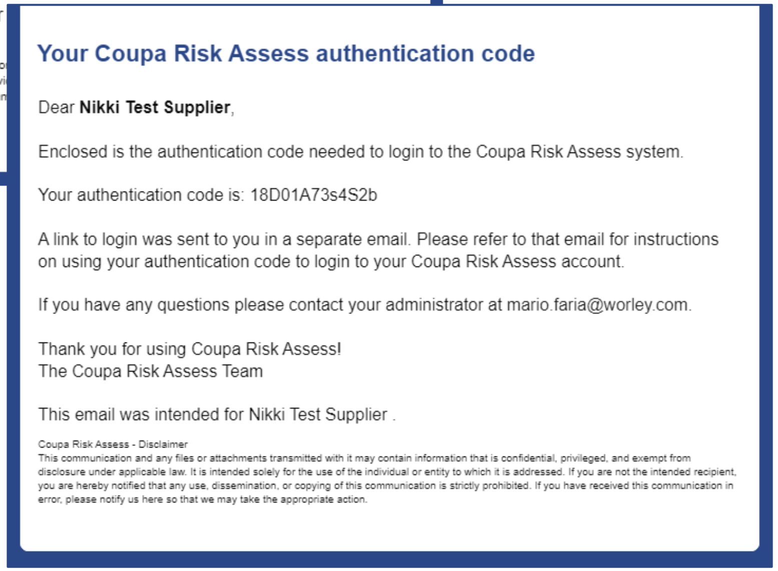
If you have any questions please contact your administrator at mario.faria@worley.com.

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 co
disclosure under applicable law. It is intended solely for the use of the indivi
you are hereby notified that any use, dissemination, or copying of this comm
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

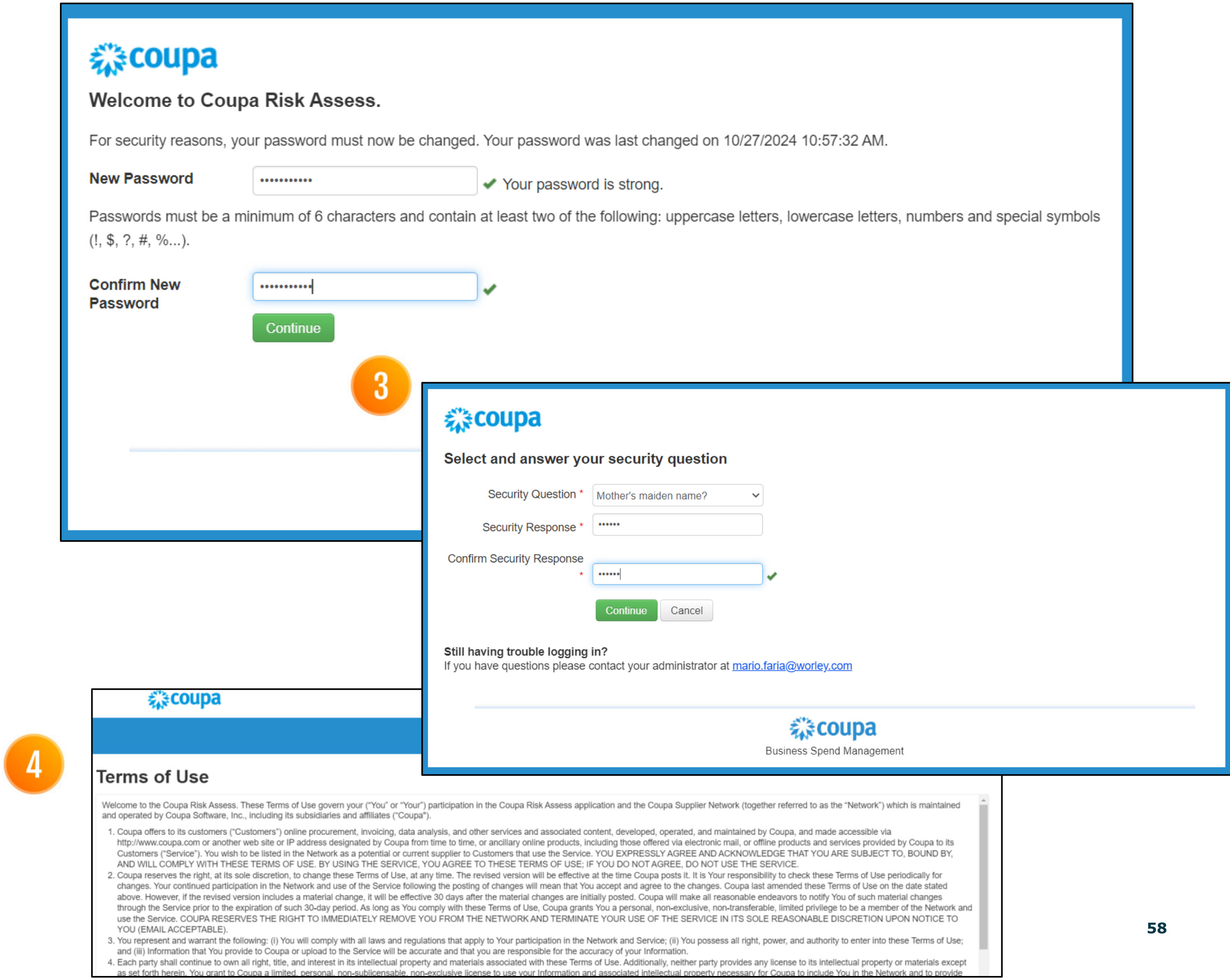
This email was intended for Nikki Test Supplier .

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.

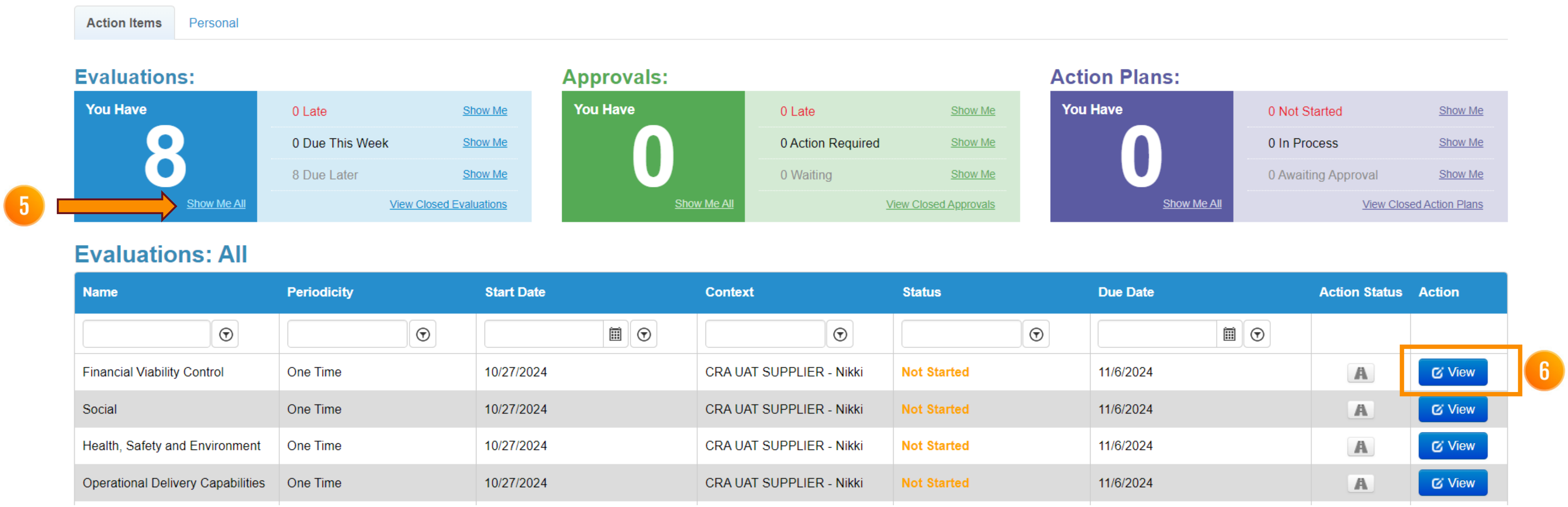


worley DELIVERING SUSTAINABLE CHANGE
OneSource Digital Sourcing Transformation Project

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

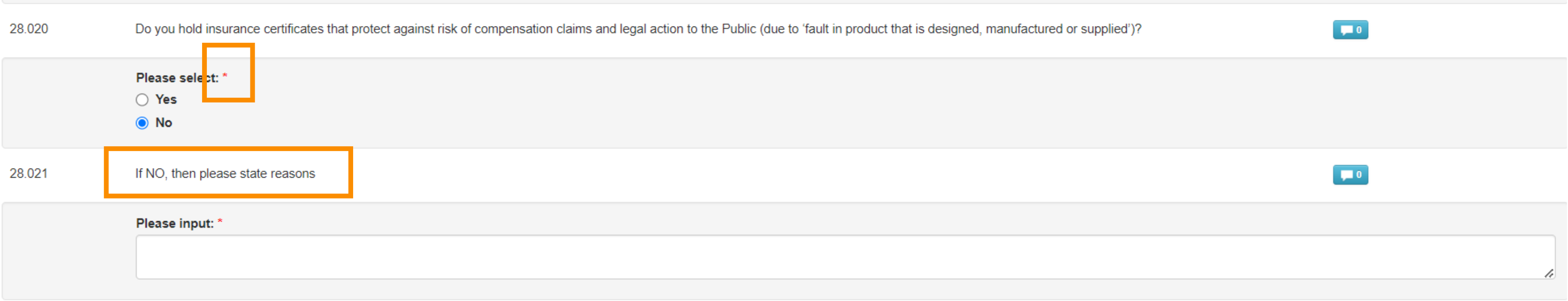
5. Once logged in, select Show Me All (located under the blue Evaluation 8), you will then see the evaluations required for completion.

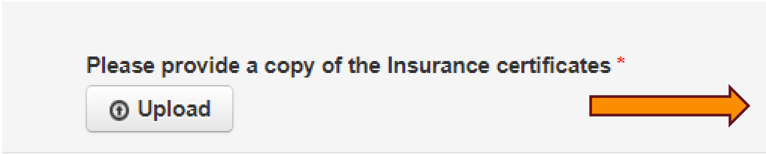
6. When ready to start – select View (hint: you can start now and save and return later)

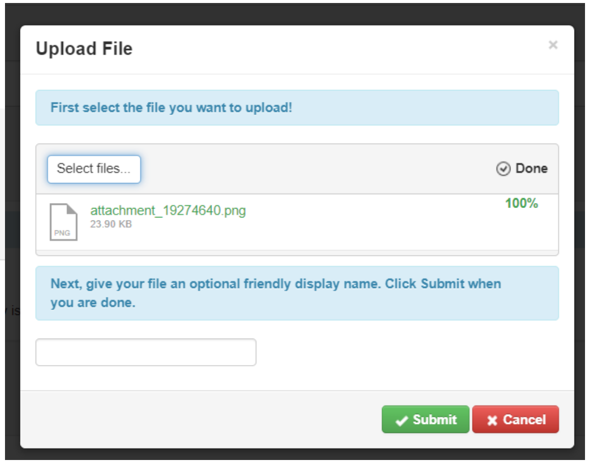


New to Coupa | Coupa Risk Assess (CRA)
CRA Evaluation Invitations

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)







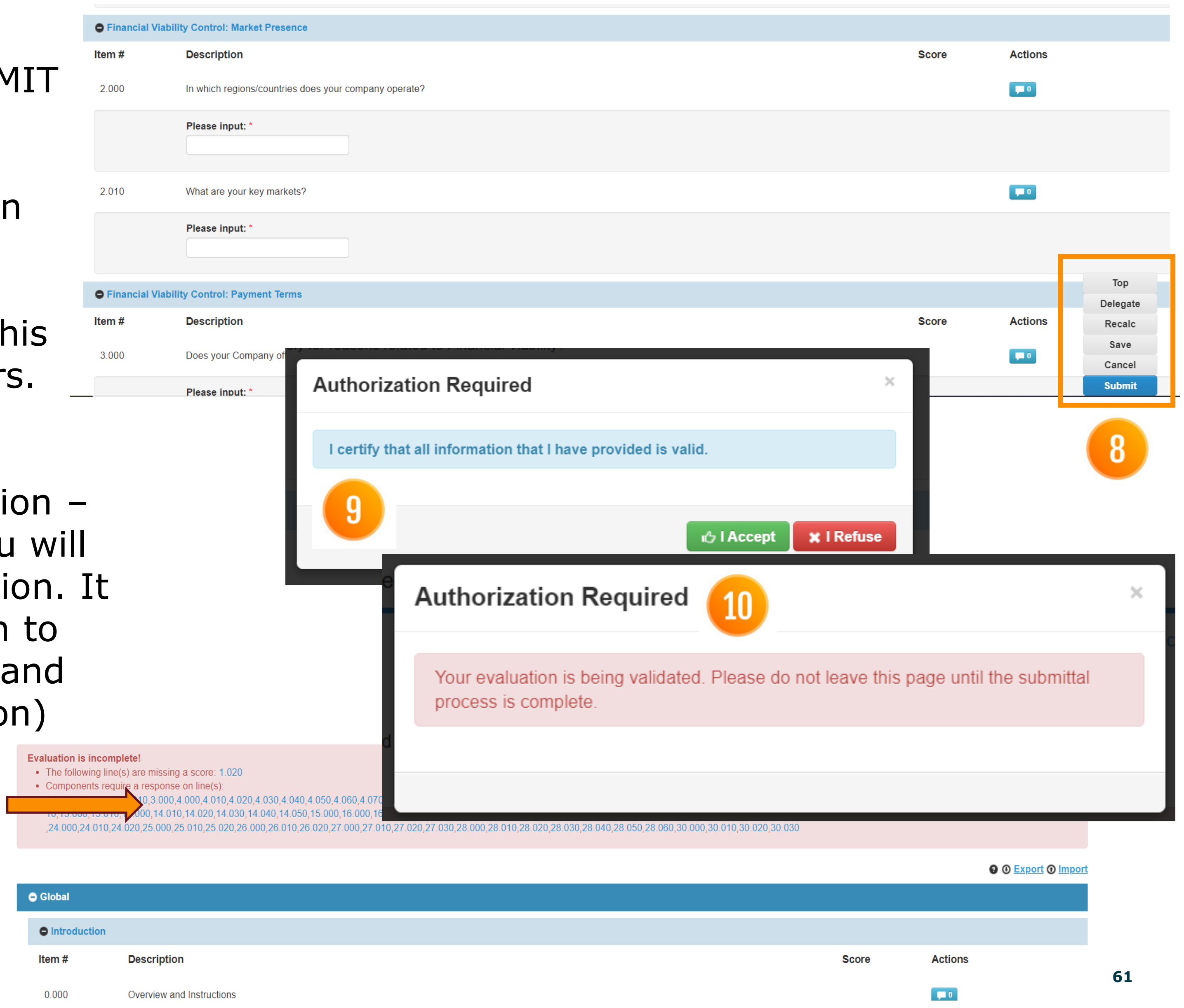
New to Coupa | Coupa Risk Assess (CRA)
CRA Evaluation Invitations

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.

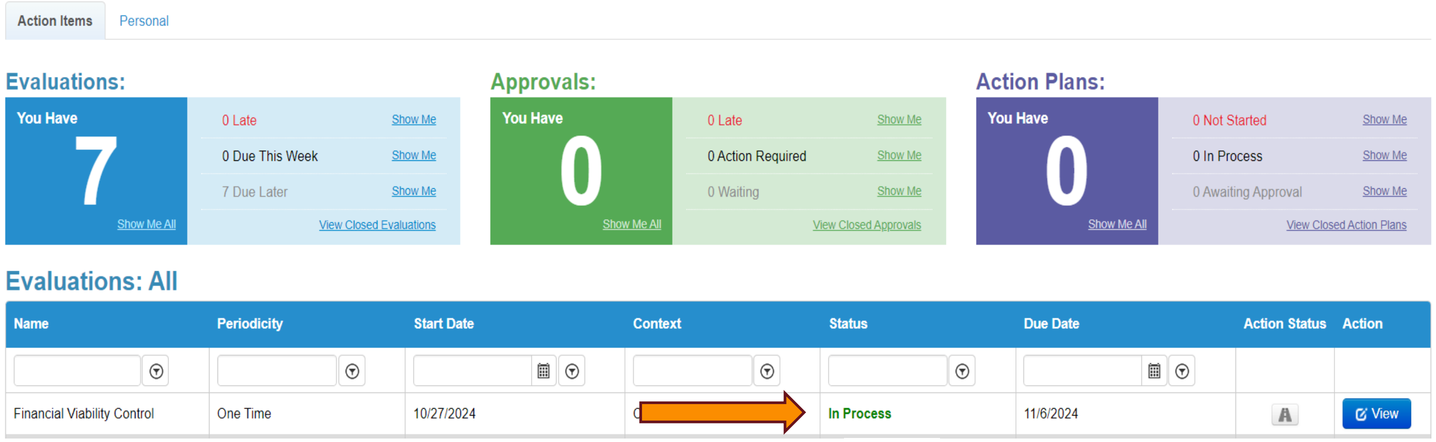
11. If you have missed any important information – CRA will highlight what was missed and you will need to complete before you try resubmission. It notes the item# that is missing information to make it easy to find (each # is also a link and will take you to the question requiring action)



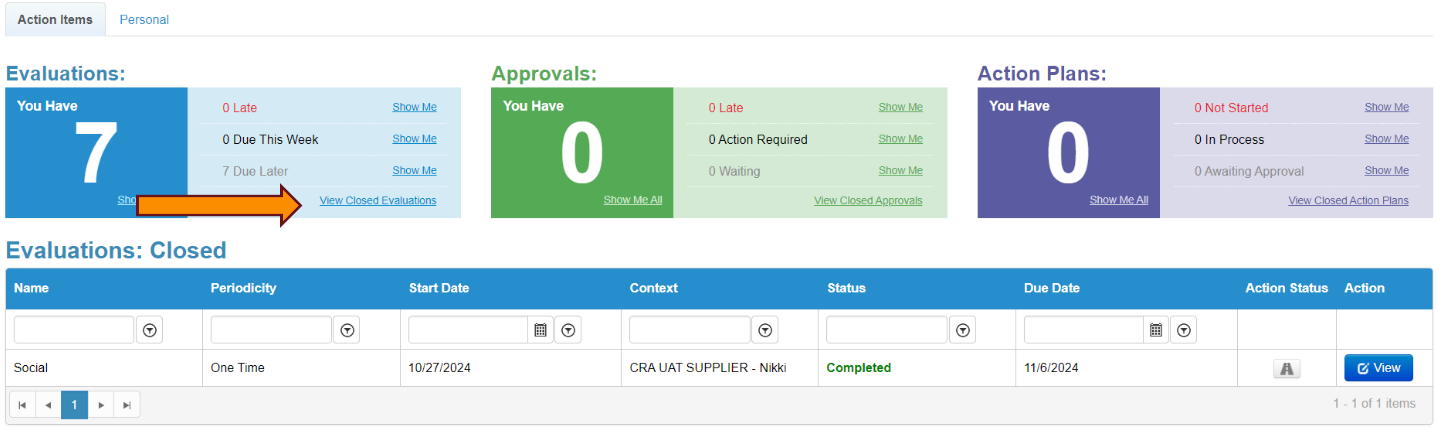
New to Coupa | Coupa Risk Assess (CRA)
CRA Evaluation Invitations

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**



12



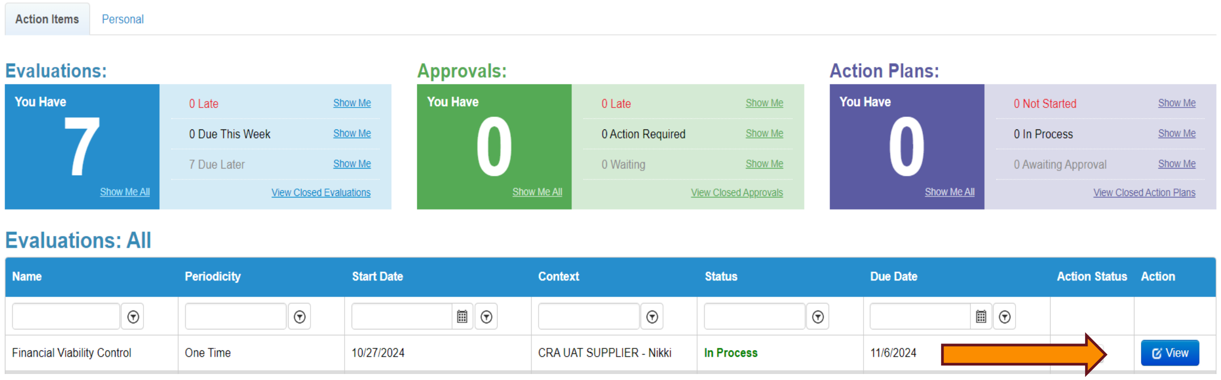
13

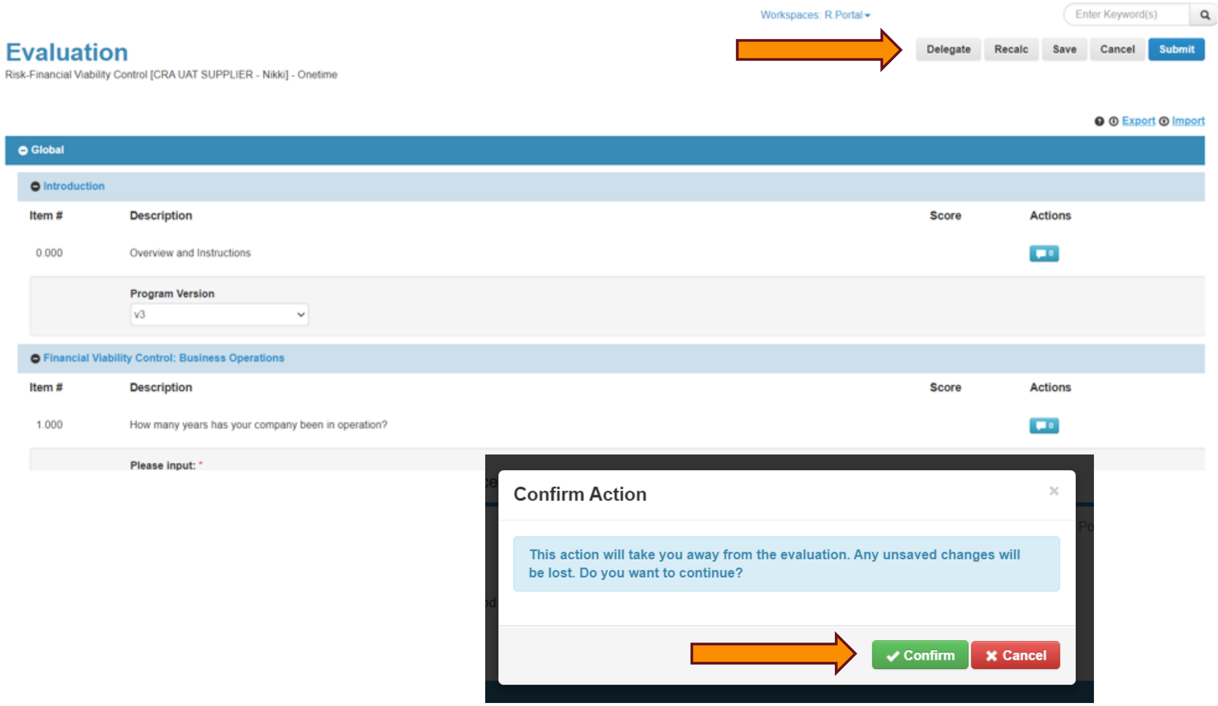
New to Coupa | Coupa Risk Assess (CRA)
CRA Evaluation Invitations

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**

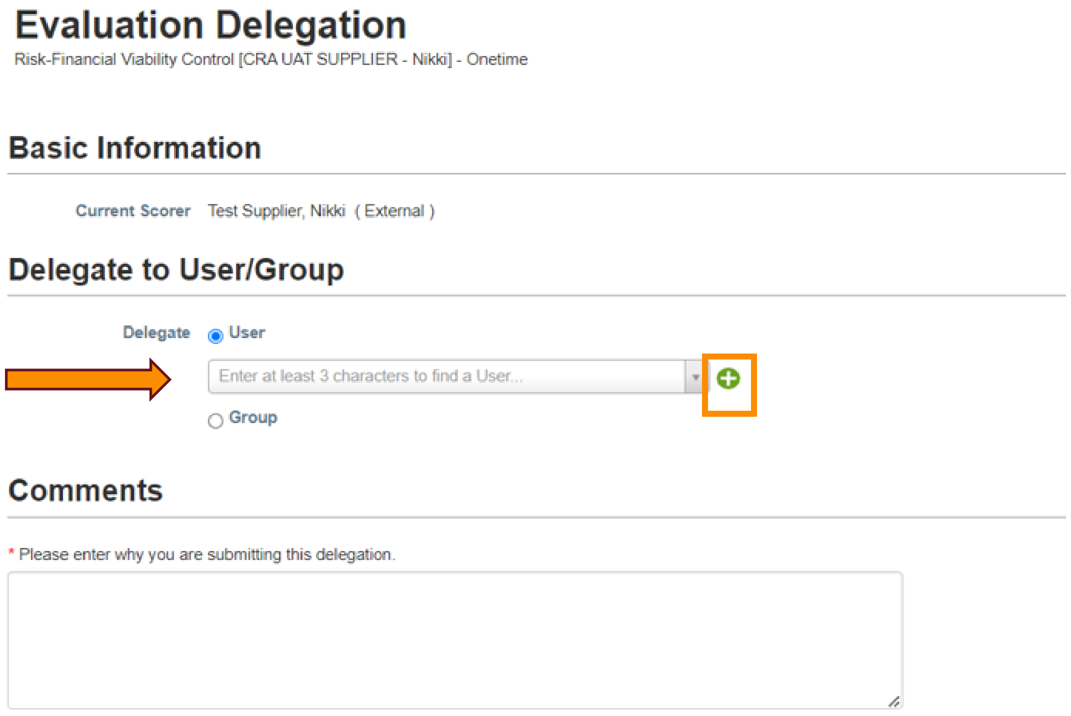


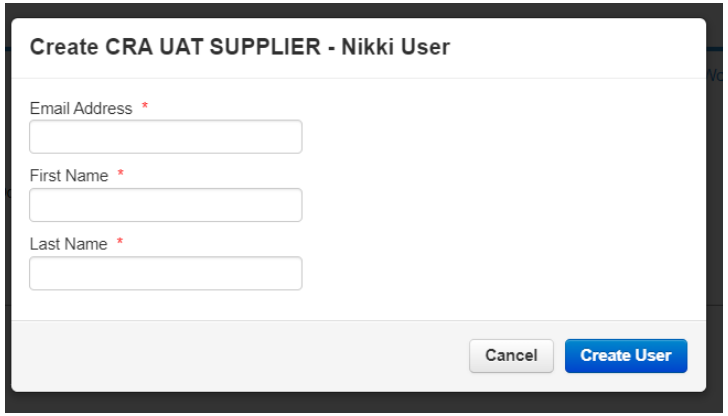


New to Coupa | Coupa Risk Assess (CRA)
CRA Evaluation Invitations

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.



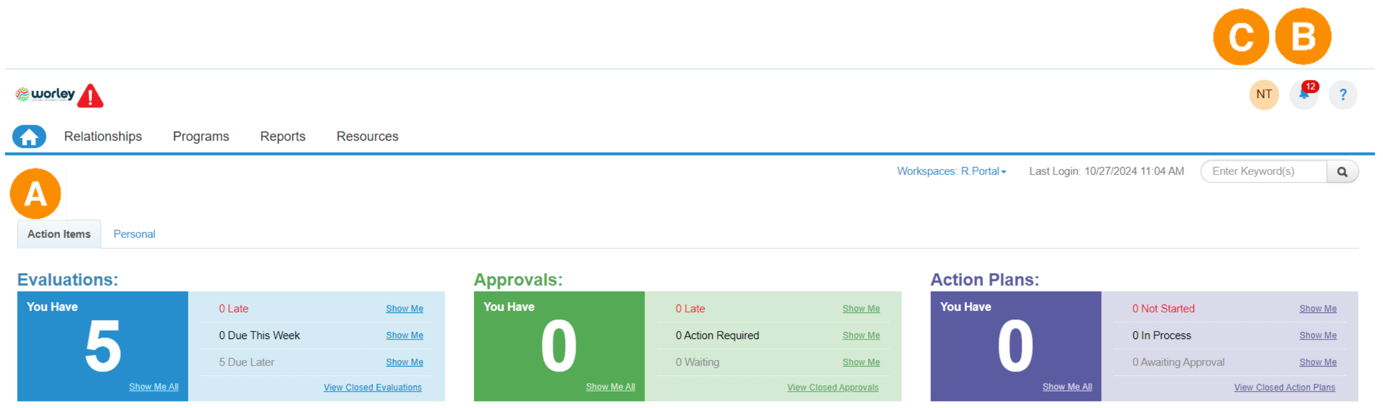


COUPA RISK ASSESS (CRA)

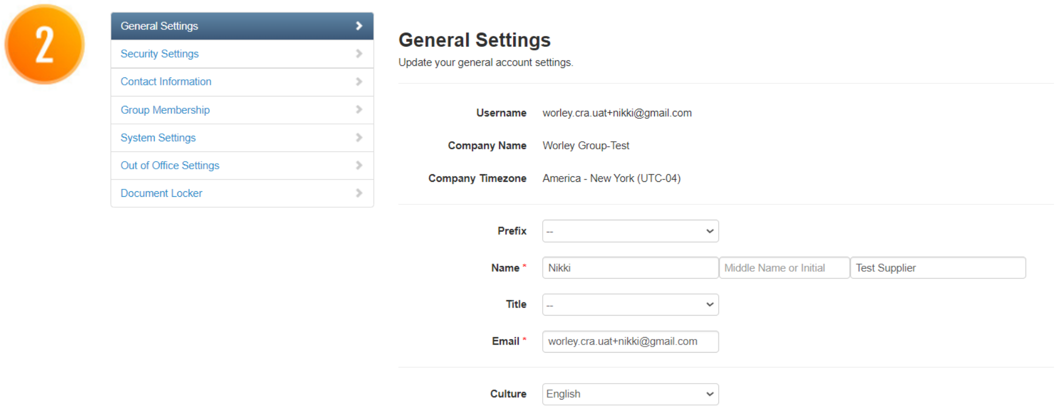
2. Account Management

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

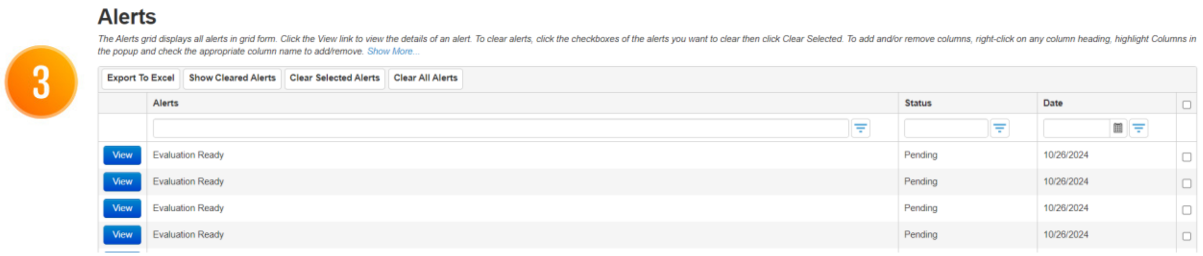
1. Home Page Management
   a. Here is where you will find your evaluation history, and anything currently required
   b. Alerts can be accessed by selecting the notification bell
   c. Account Management can be accessed by clicking your initials



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



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



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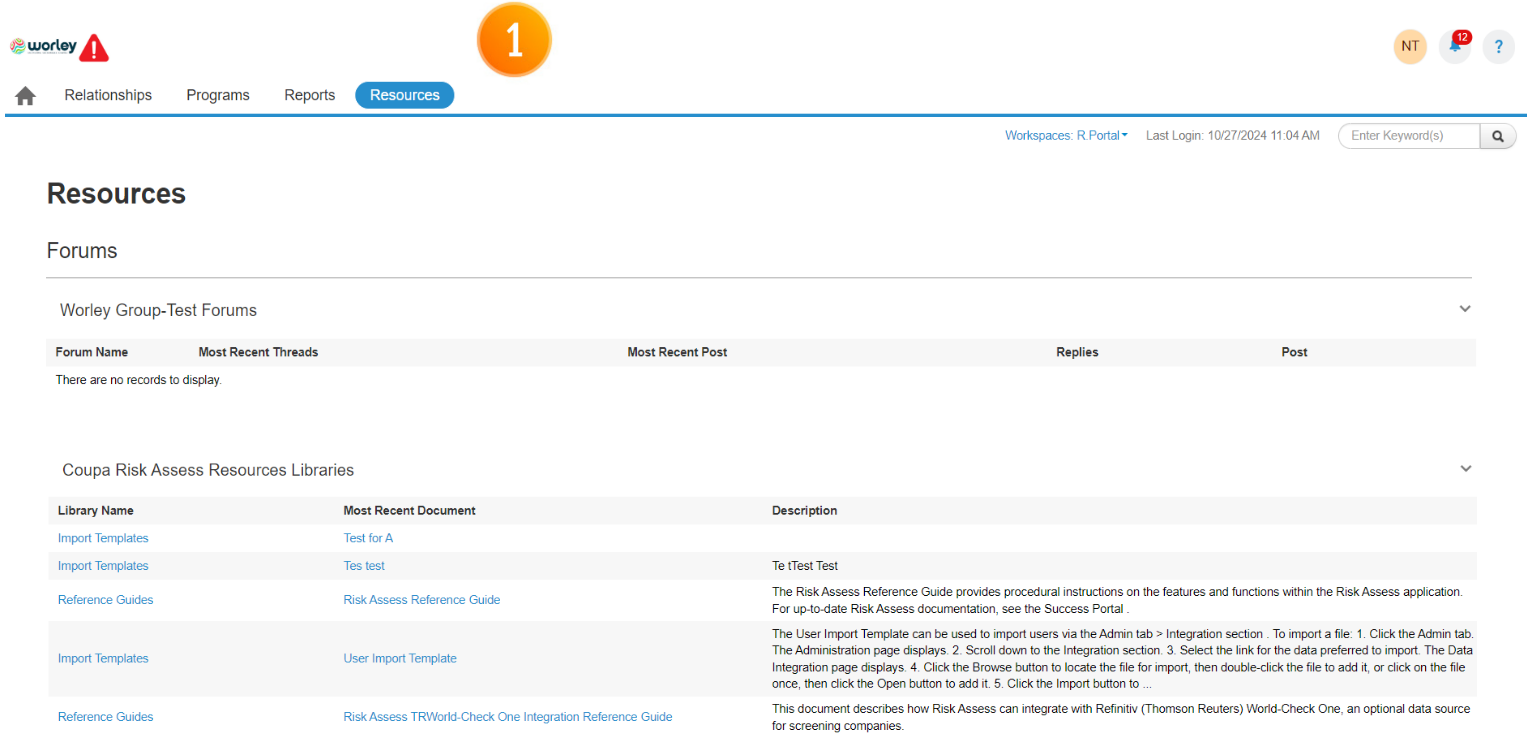
COUPA RISK ASSESS (CRA)

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



SOURCING RESPONSE PORTAL

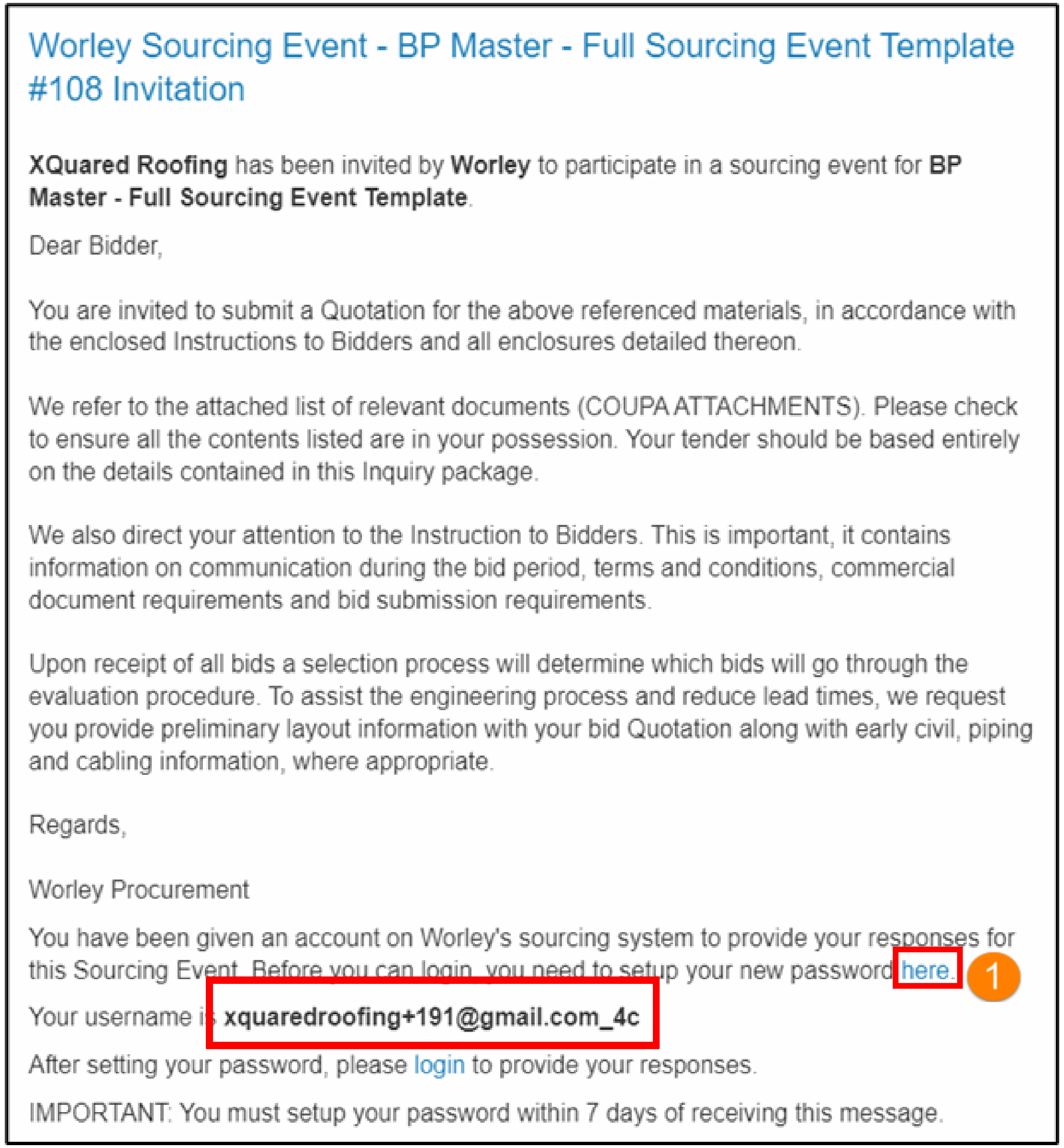
1. Responding to Sourcing Events

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**.



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

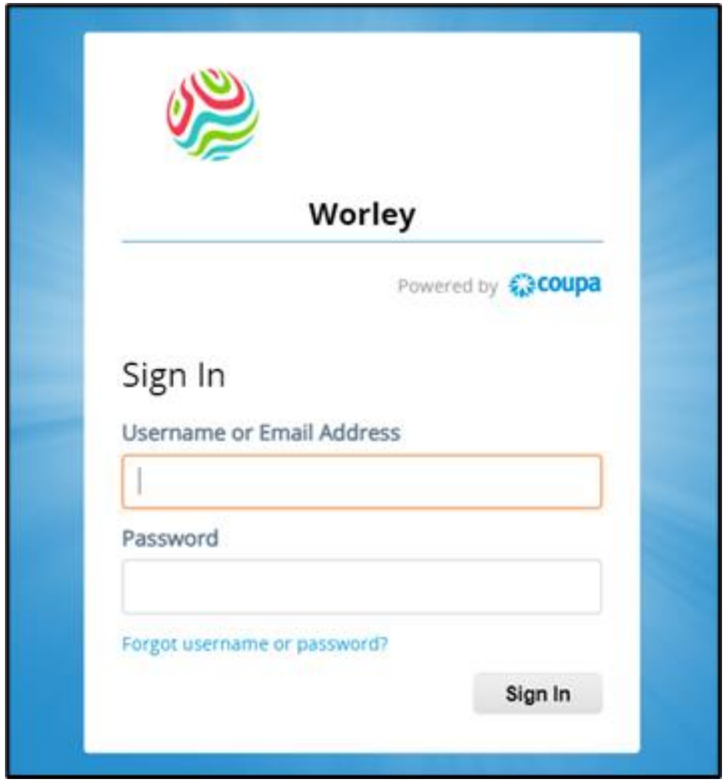
Your username is **xquaredroofing+191@gmail.com_4c**

After setting your password, please login to provide your responses.

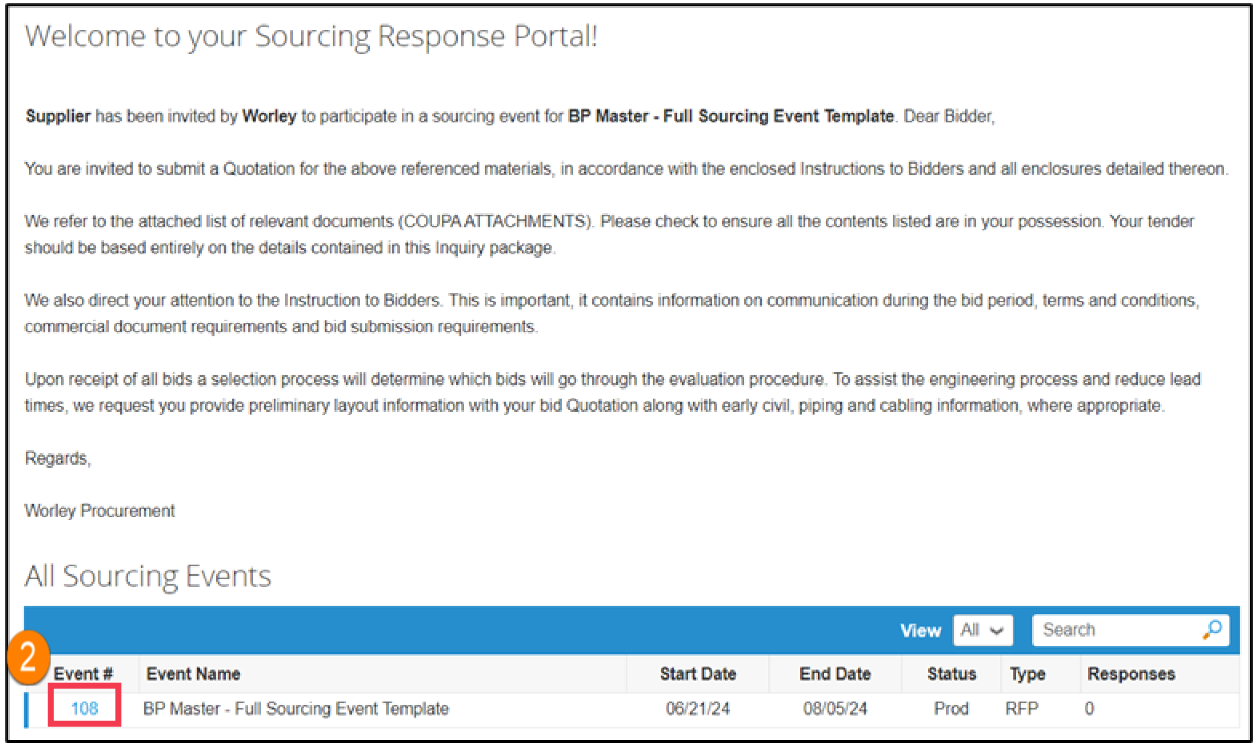
IMPORTANT: You must setup your password within 7 days of receiving this message.

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.



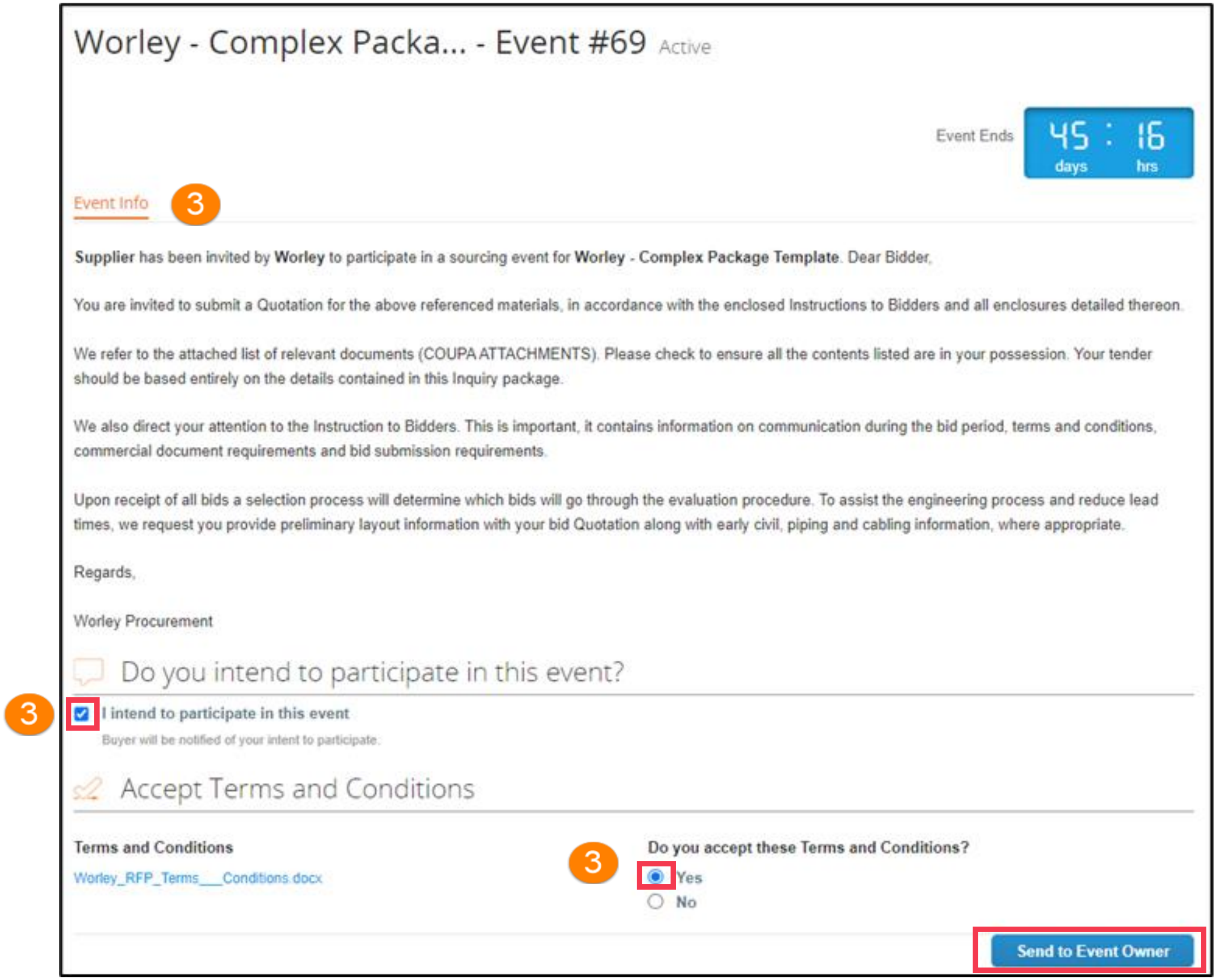
2. You will now be redirected to the Sourcing Response Portal. Click on the **Event #**



Responding to Sourcing Events

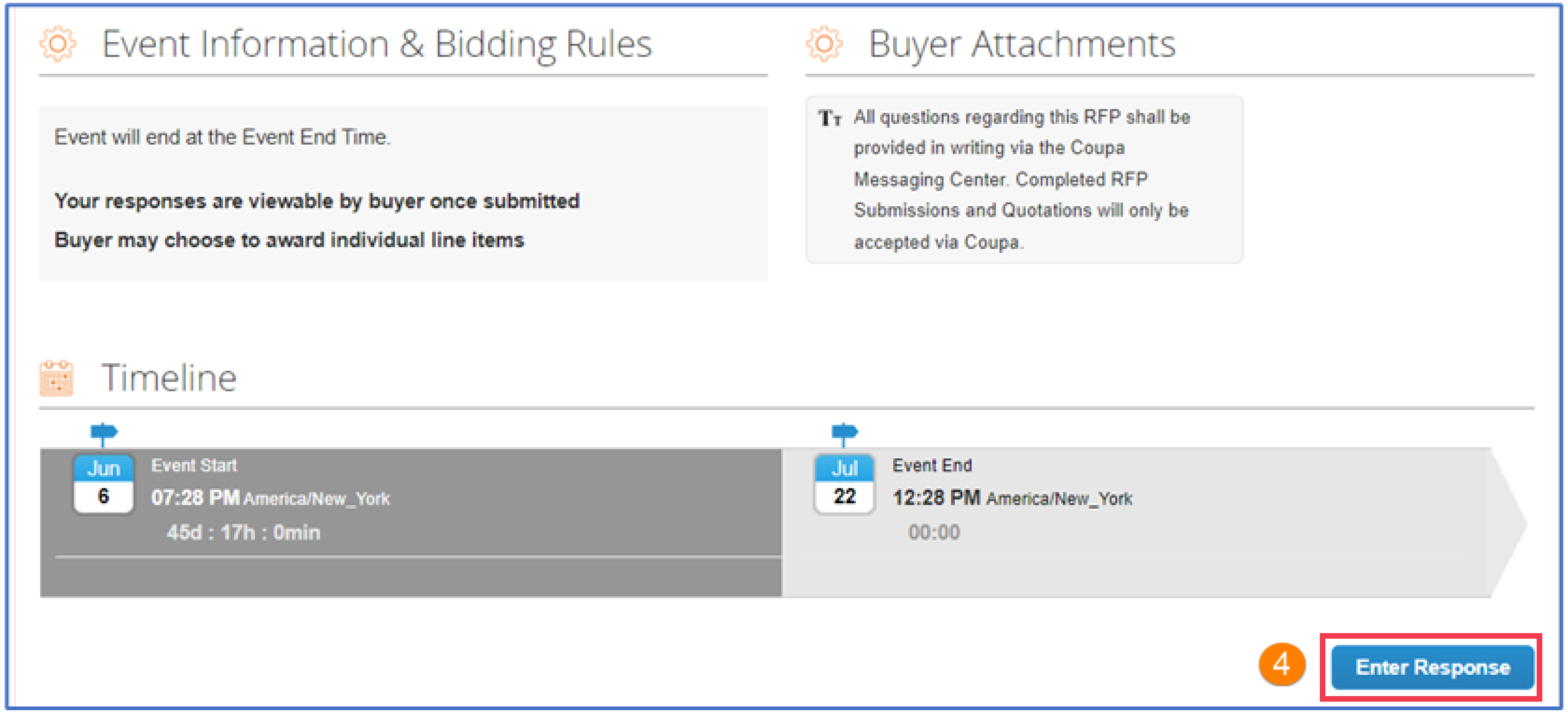
3. On the Event info tab, acknowledge the event by indicating intent to participate in the event and accept the terms and conditions.

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



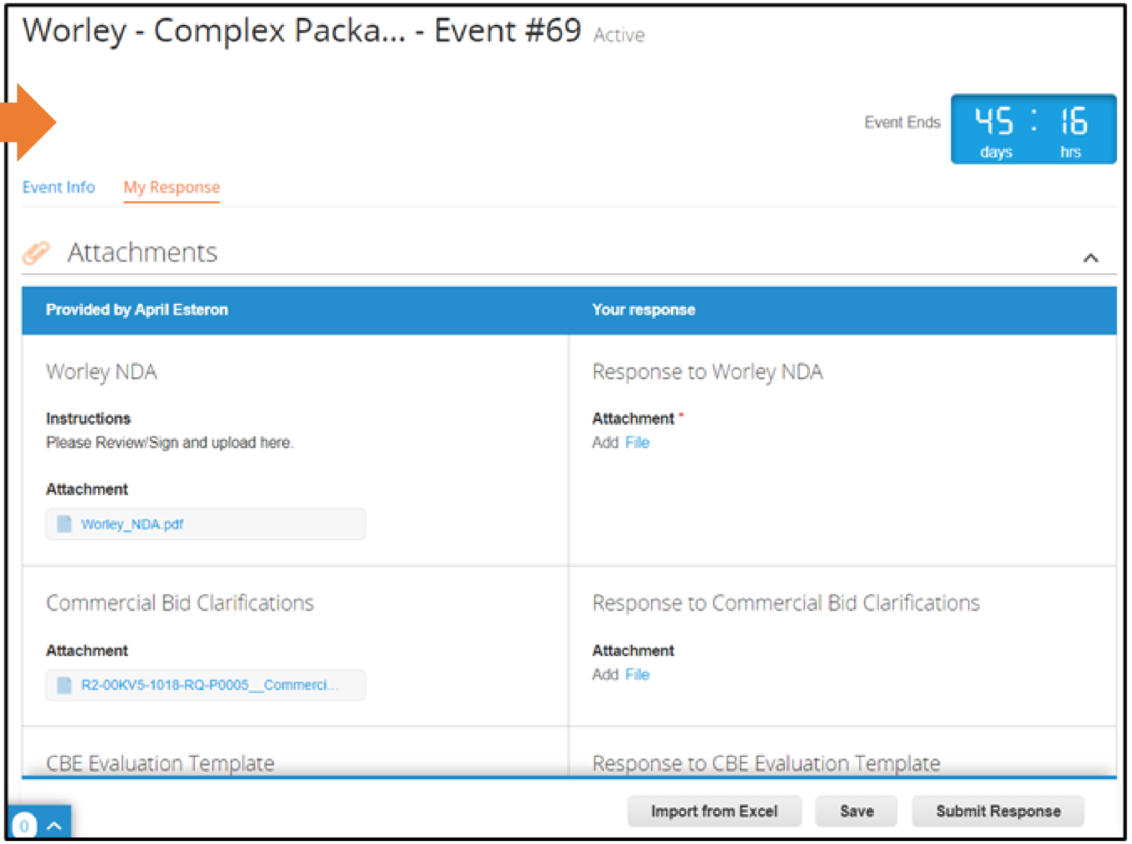
Responding to Sourcing Events

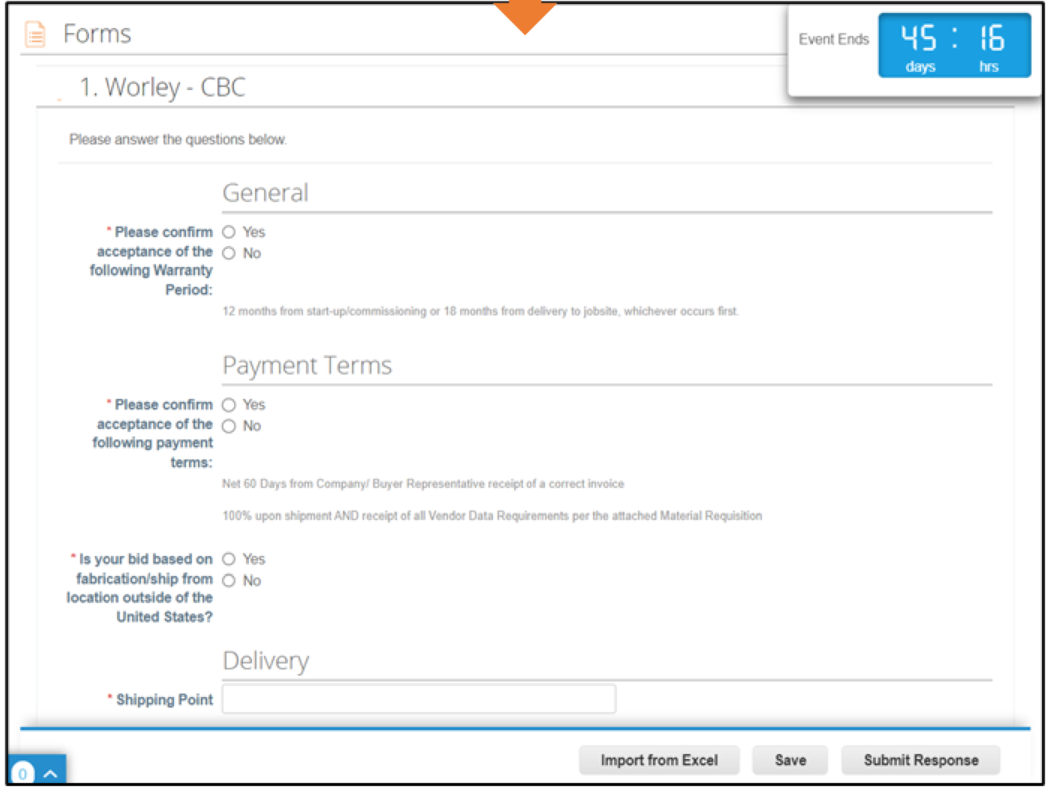
4. Scroll down to view event information & bidding rules, buyer attachments, and timeline. Click **Enter Response** to provide a response and submit a bid.



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.

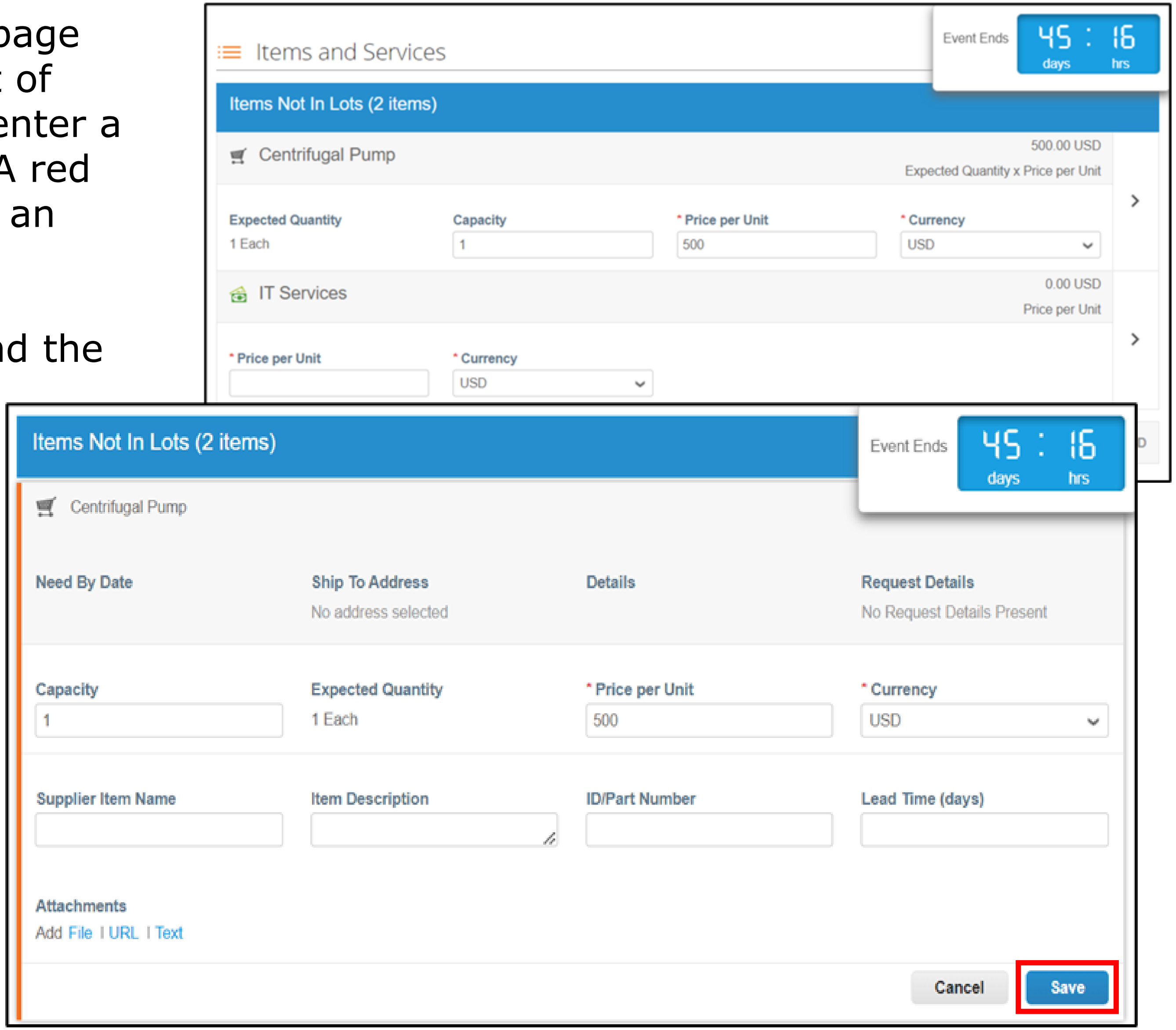




Responding to Sourcing Events

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**.



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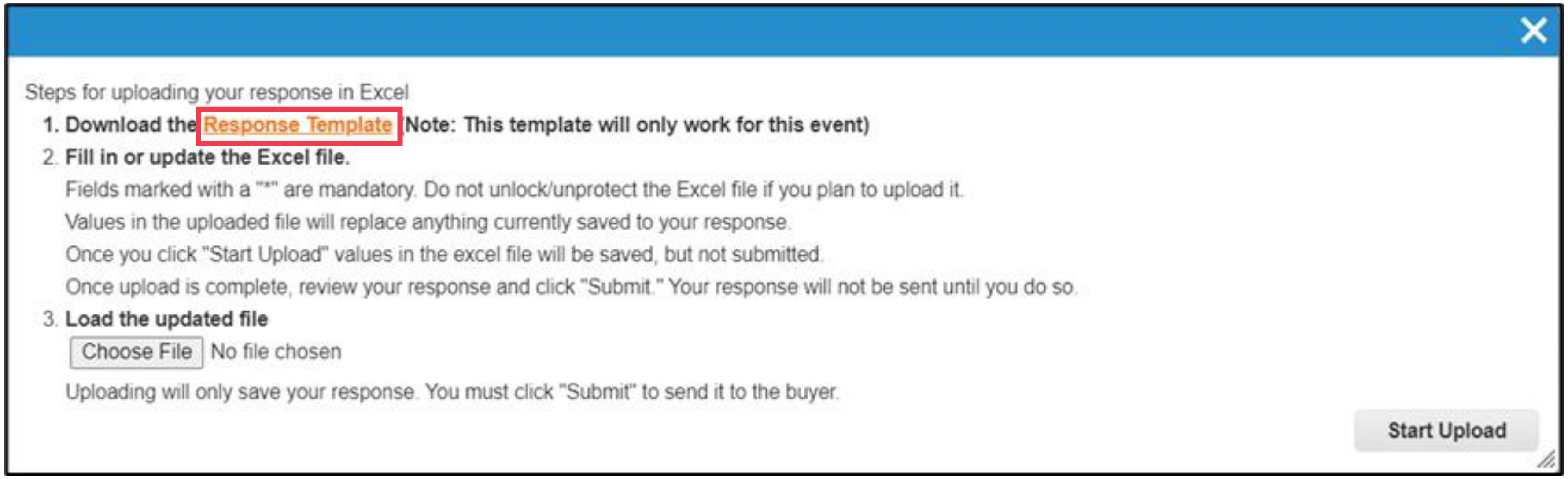
Responding to Sourcing Events

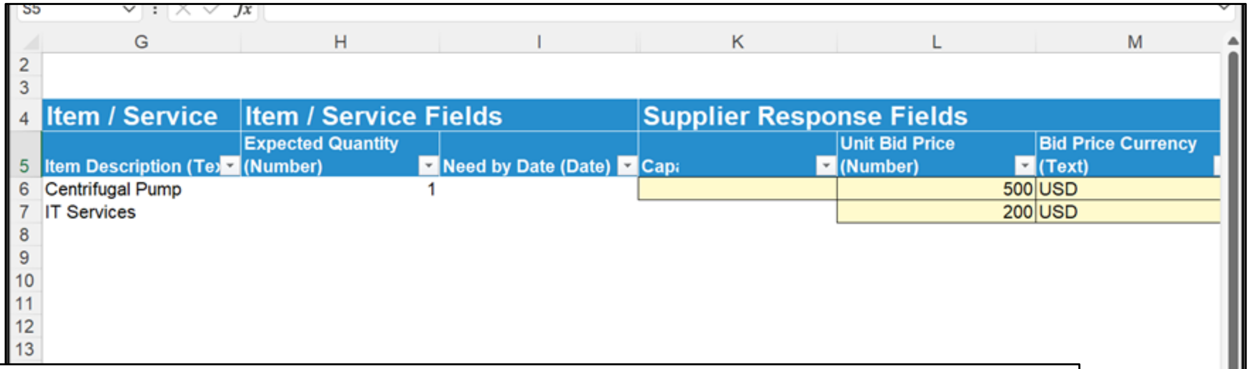
If the Event contains several line items and/or if you want to answer the forms or questionnaires via Excel, click **Import from Excel**….

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

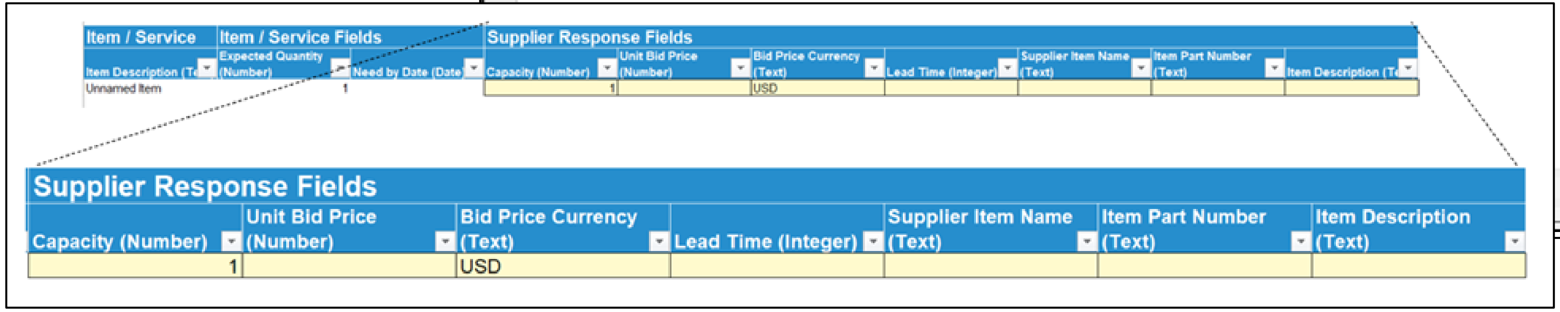


Responding to Sourcing Events

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.



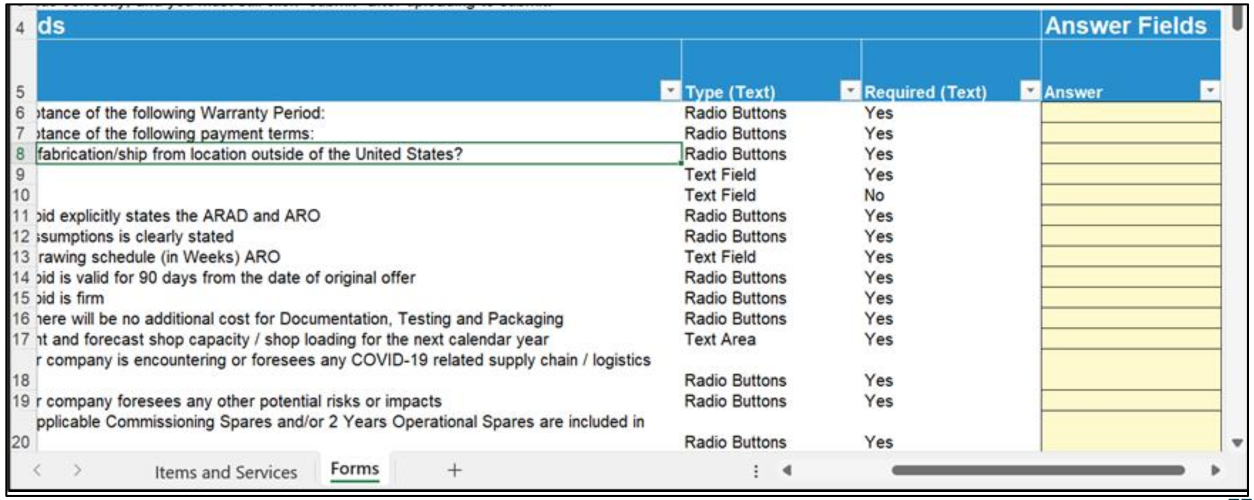
	Item / Service	Item / Service Fields		Supplier Response Fields		
	Item Description (Te	Expected Quantity (Number)	Need by Date (Date)	Capa	Unit Bid Price (Number)	Bid Price Currency (Text)
6	Centrifugal Pump	1			500	USD
7	IT Services				200	USD



Item / Service	Item / Service Fields		Supplier Response Fields						
Item Description (Te	Expected Quantity (Number)	Need by Date (Date	Capacity (Number)	Unit Bid Price (Number)	Bid Price Currency (Text)	Lead Time (Integer)	Supplier Item Name (Text)	Item Part Number (Text)	Item Description (Te
Unnamed Item	1		1		USD				

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

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



	ds			Answer Fields
5		Type (Text)	Required (Text)	Answer
6	›tance of the following Warranty Period:	Radio Buttons	Yes	
7	›tance of the following payment terms:	Radio Buttons	Yes	
8	fabrication/ship from location outside of the United States?	Radio Buttons	Yes	
9		Text Field	Yes	
10		Text Field	No	
11	›id explicitly states the ARAD and ARO	Radio Buttons	Yes	
12	›sumptions is clearly stated	Radio Buttons	Yes	
13	rawing schedule (in Weeks) ARO	Text Field	Yes	
14	›id is valid for 90 days from the date of original offer	Radio Buttons	Yes	
15	›id is firm	Radio Buttons	Yes	
16	›ere will be no additional cost for Documentation, Testing and Packaging	Radio Buttons	Yes	
17	›t and forecast shop capacity / shop loading for the next calendar year	Text Area	Yes	
18	r company is encountering or foresees any COVID-19 related supply chain / logistics	Radio Buttons	Yes	
19	r company foresees any other potential risks or impacts	Radio Buttons	Yes	
20	pplicable Commissioning Spares and/or 2 Years Operational Spares are included in	Radio Buttons	Yes	

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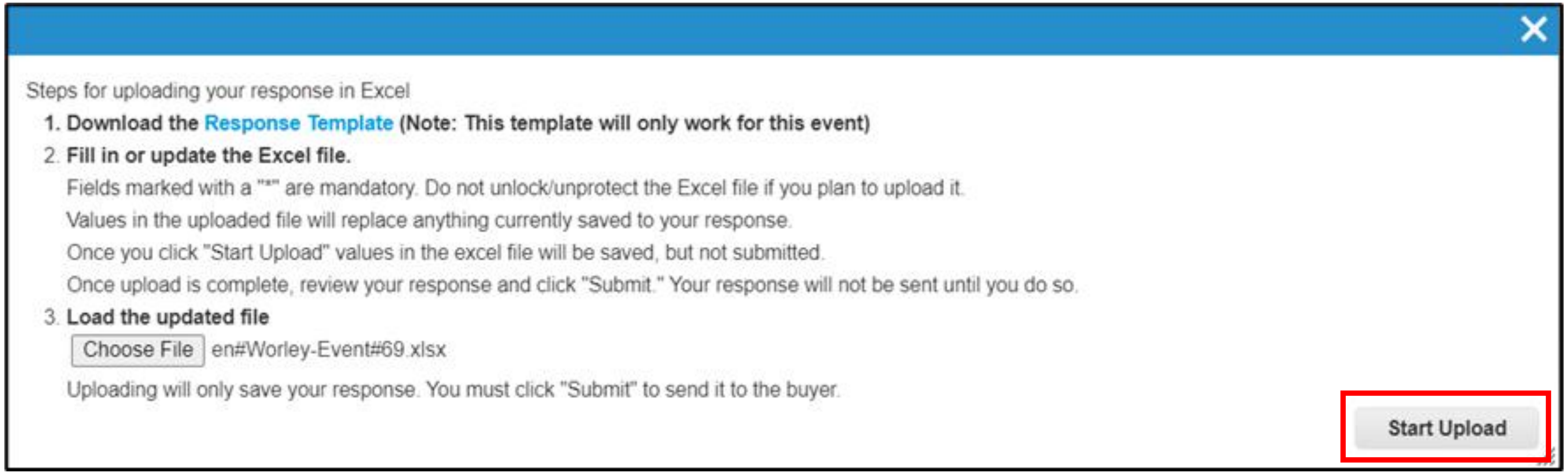
Responding to Sourcing Events

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

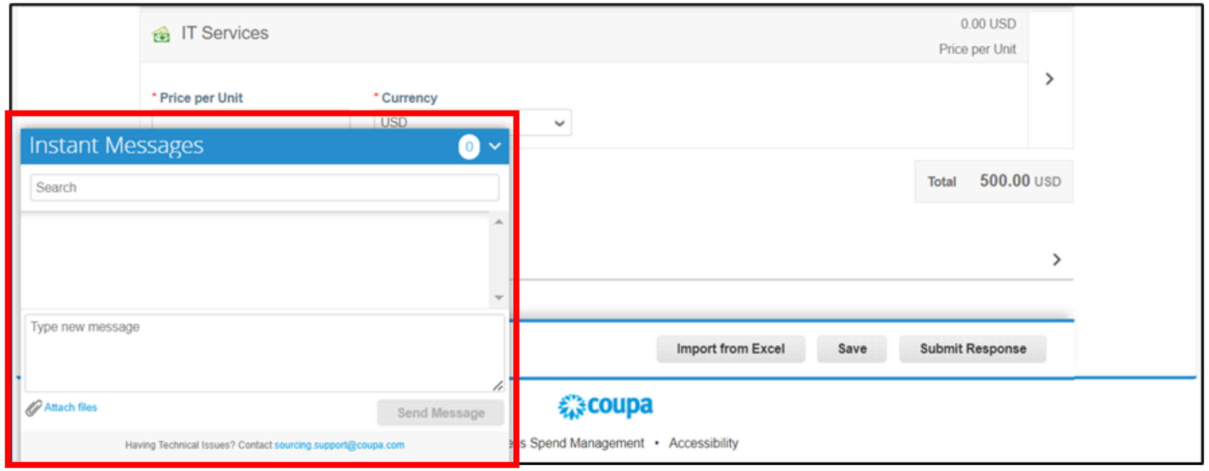
Once done, save the Excel file and click **Choose File** to load the spreadsheet. Click on **Start Upload** and a green banner showing “Excel import successful. Remember to submit your changes below.” will appear.



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.



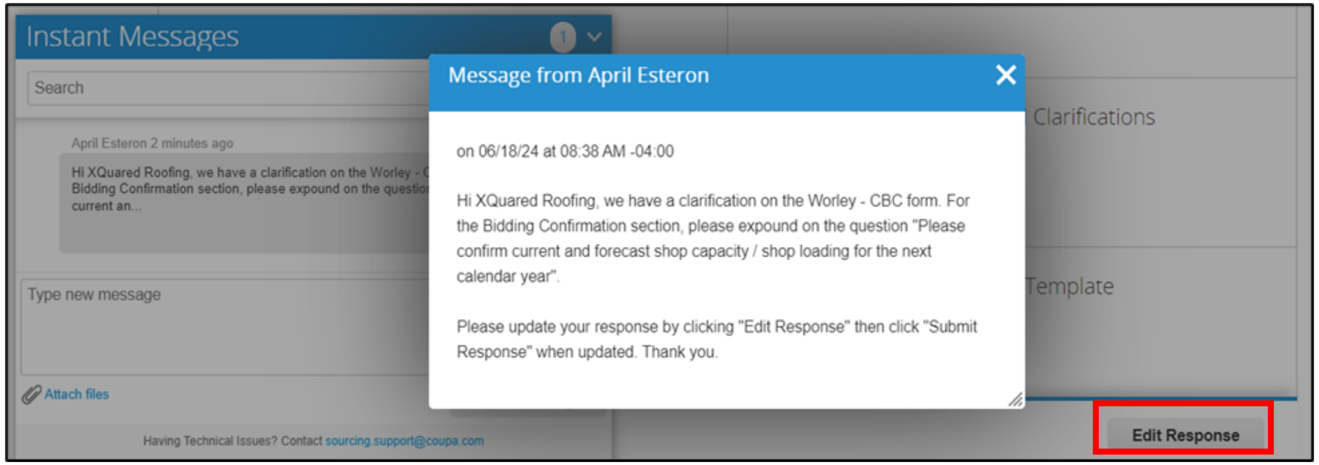
6. To submit the response, click **Submit Response**. Worley will receive a notification that the response was submitted.

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.

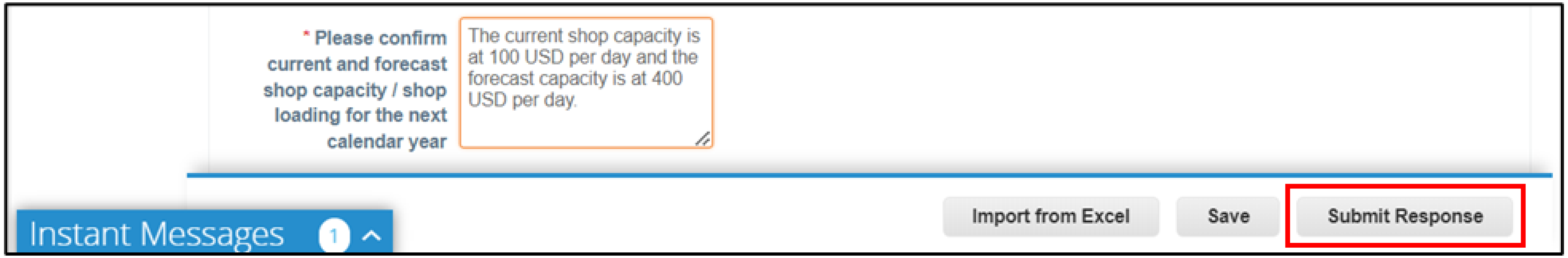
   Note: How to reply to the Worley CBC (Commercial Bid Clarification) Form:
   Should there be clarifications required on the form, please follow the steps below.

   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.



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.

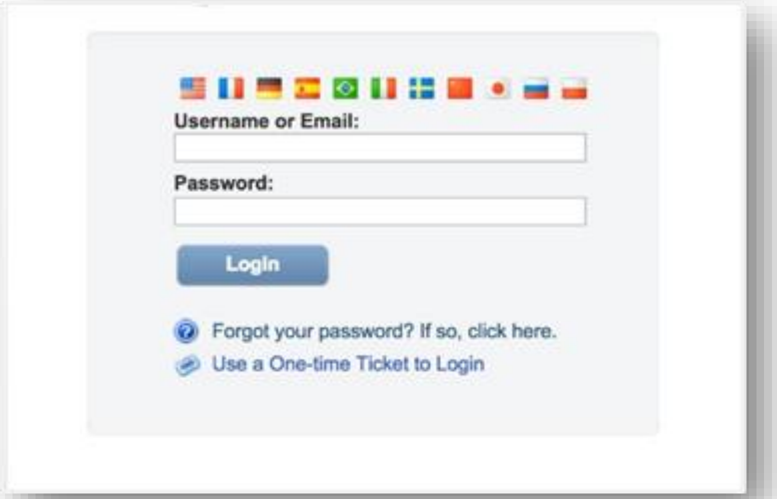
Coupa Sourcing Optimization (CSO) offers several benefits to suppliers that can enhance their experience and operational efficiency within the procurement process.

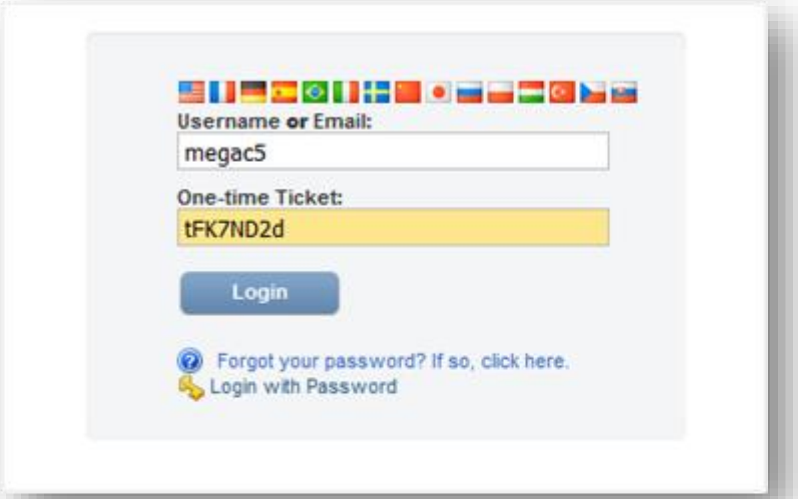
- ✓ Greater visibility into demand forecasts, market trends, and buyer requirements
- ✓ Direct interactions with buyers through the platform, leading to clearer expectations, faster responses to inquiries, and streamlined negotiations.
- ✓ Optimized pricing strategies
- ✓ Provides data-driven insights 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.





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

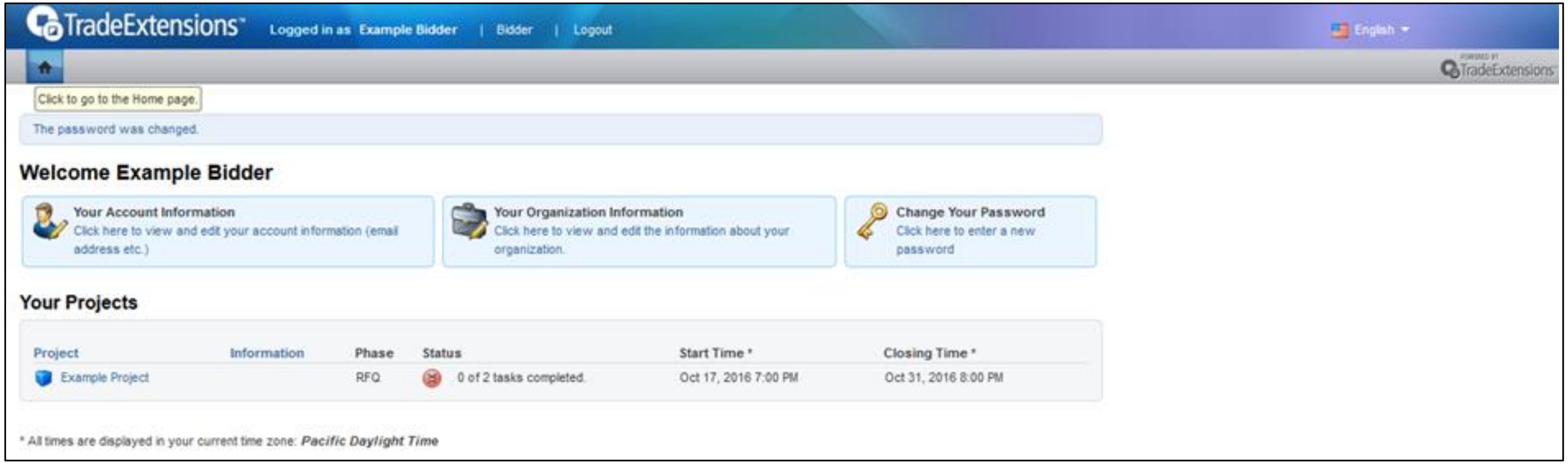
You will also be asked to review and update your personal contact information the first time you log in.

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

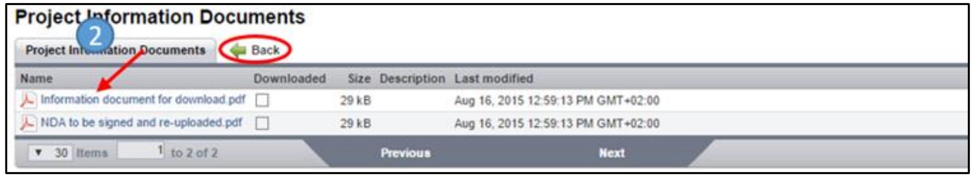
This is your start page in CSO where you can see the Events you are invited to and if you are required to do anything at that moment.



Gating

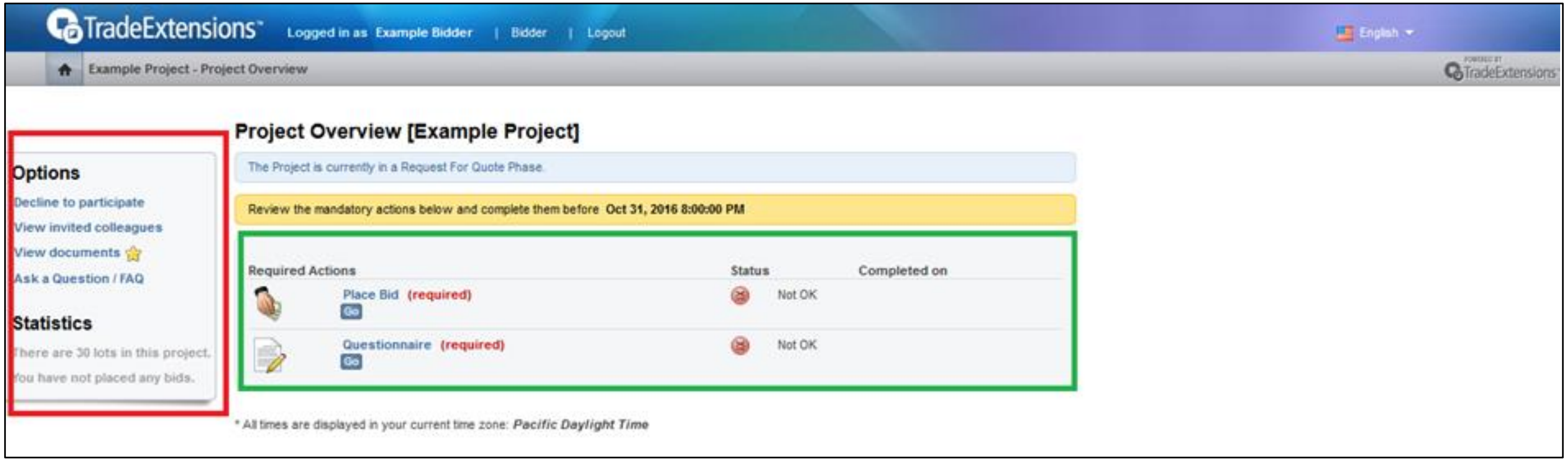
You may be required to take part of some particular information prior to getting access to the Event page in a gating step.
Clicking the event name in the start page will take you to the gating page. If there is no gating requirements for the event at hand, you will be taken directly to the Event Overview 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 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.

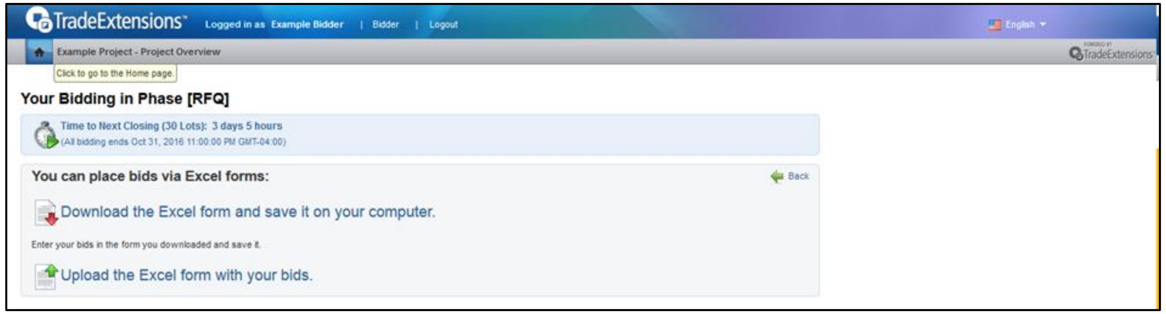
To enter a given task, click either the blue “Go” button or the name of the task, see next section.

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

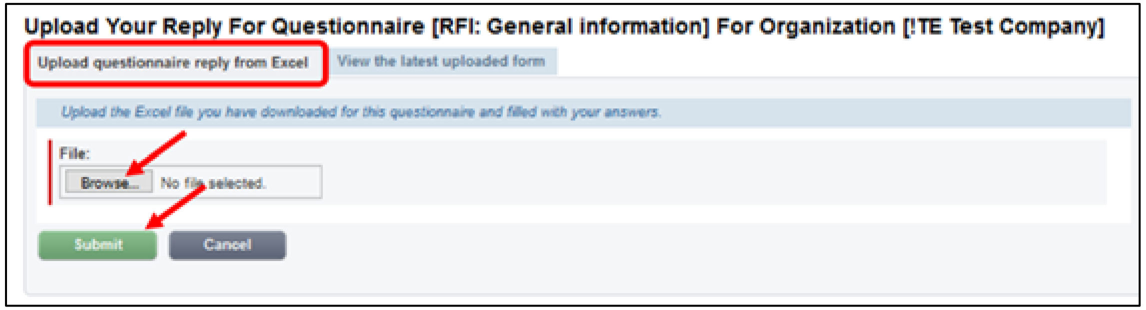
Request for Quote/Request for Information

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

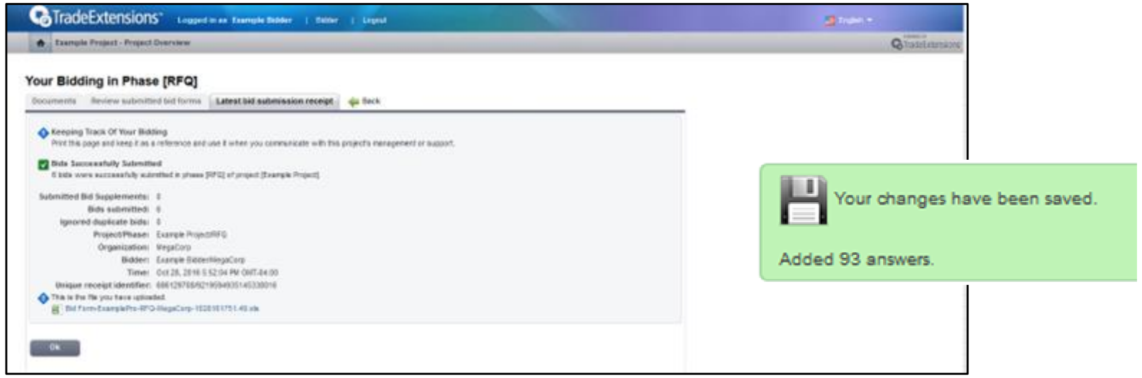
Click the link to the task in the event overview page, for instance ”Place bids” in the example above. Click “Download” and save the empty bid form or questionnaire on your computer.



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.

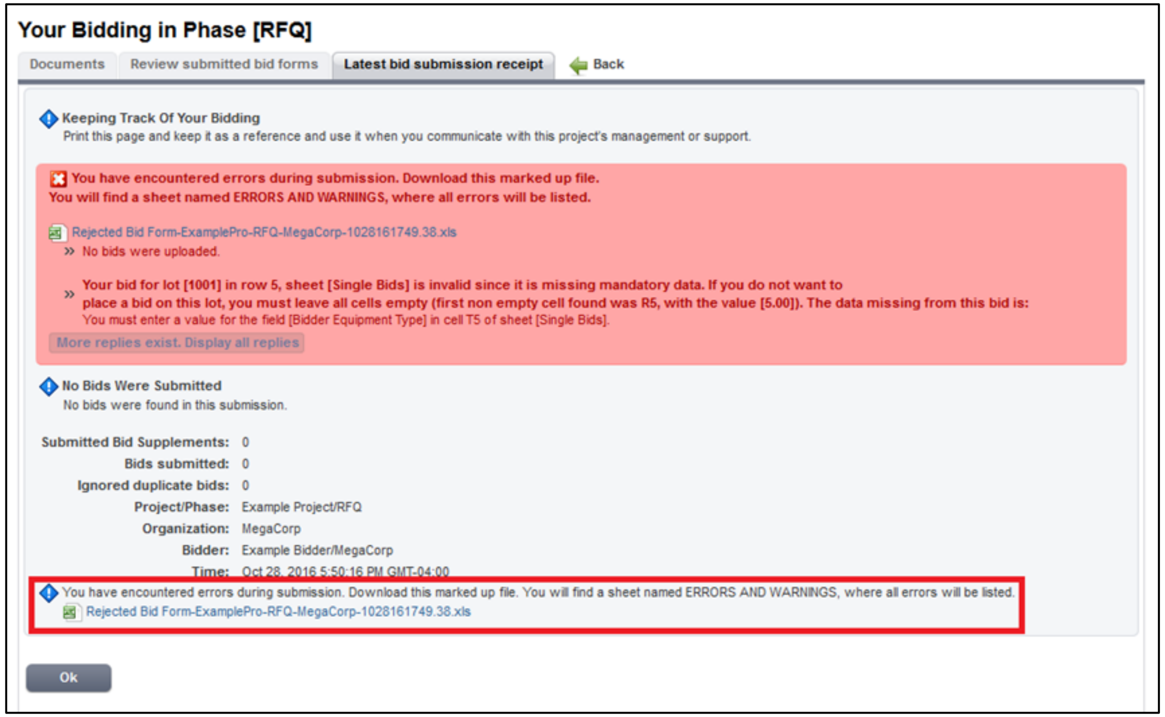


Error Messages

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.



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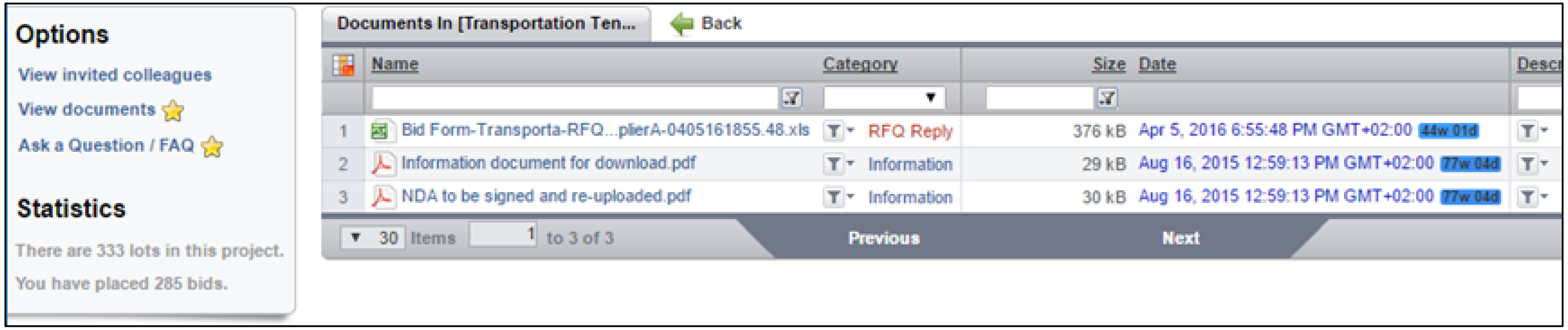
View Documents

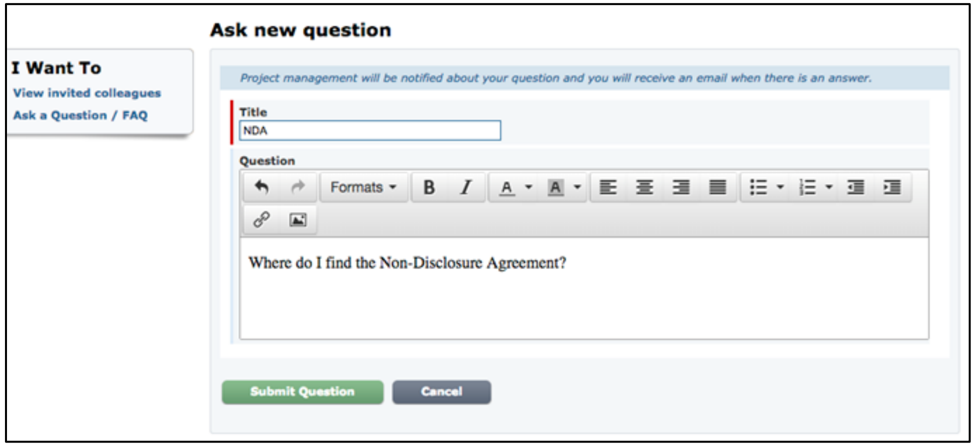
Here you can retrieve all documents provided for download as well as all the forms that you have submitted in the current phase. The star indicates if there are documents available that you have not yet downloaded (including your own submitted forms).



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.

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