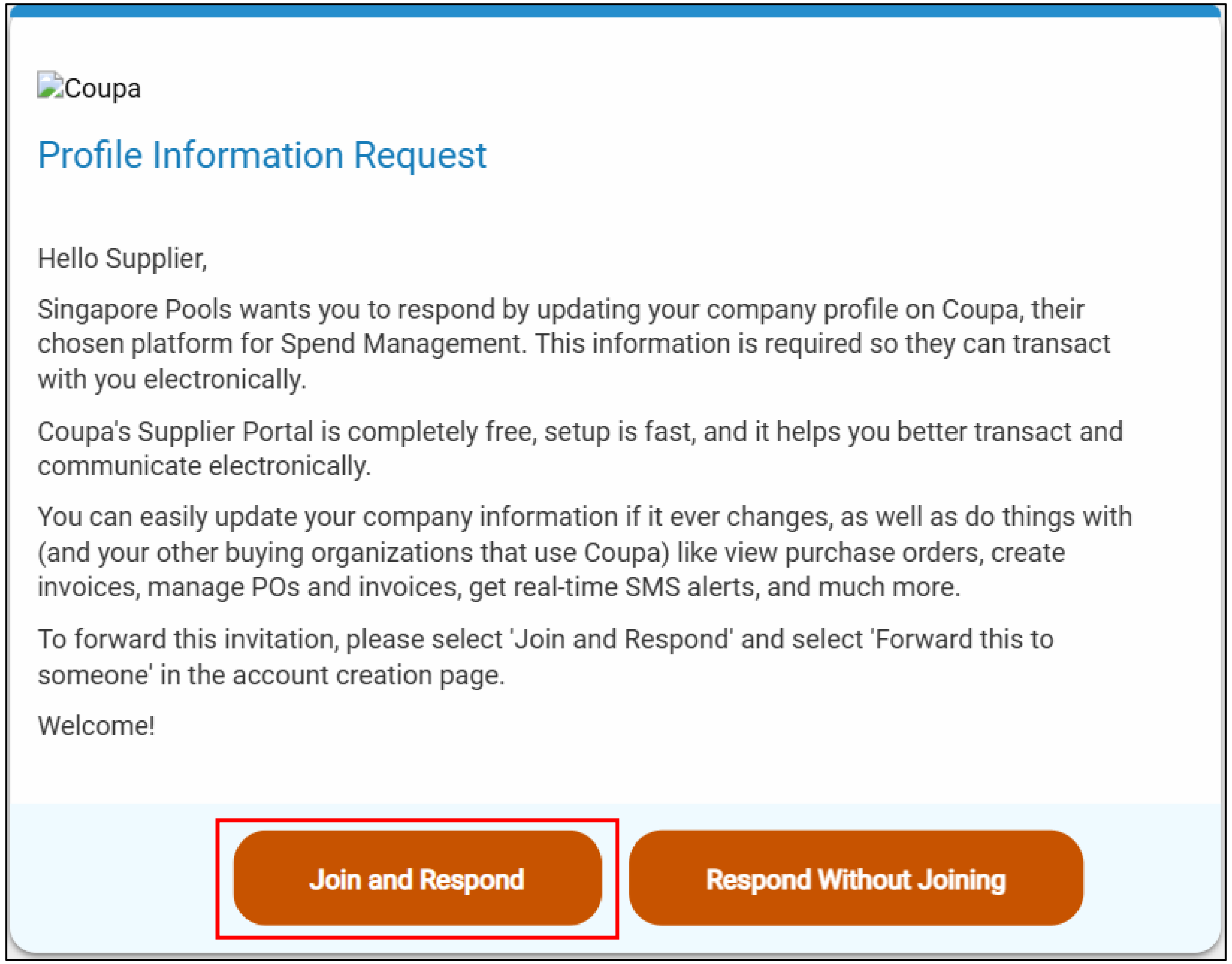
Quick-Start Guide: SIM (Supplier)

Supplier Section

- Once a “New Supplier Request” form is approved, an email requesting additional information is sent to supplier (CSP).
- Supplier will have to fill in all the mandatory details and submit the request to the requester for review & approval.

Supplier Steps for creating an Account on Coupa Supplier Portal (CSP)

Once you receive an email from SPPL inviting you to join Coupa, click on the "**Join and Respond**" button. This will redirect you to the CSP webpage to create your user account.


Coupa

Profile Information Request

Hello Supplier,

Singapore Pools 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.

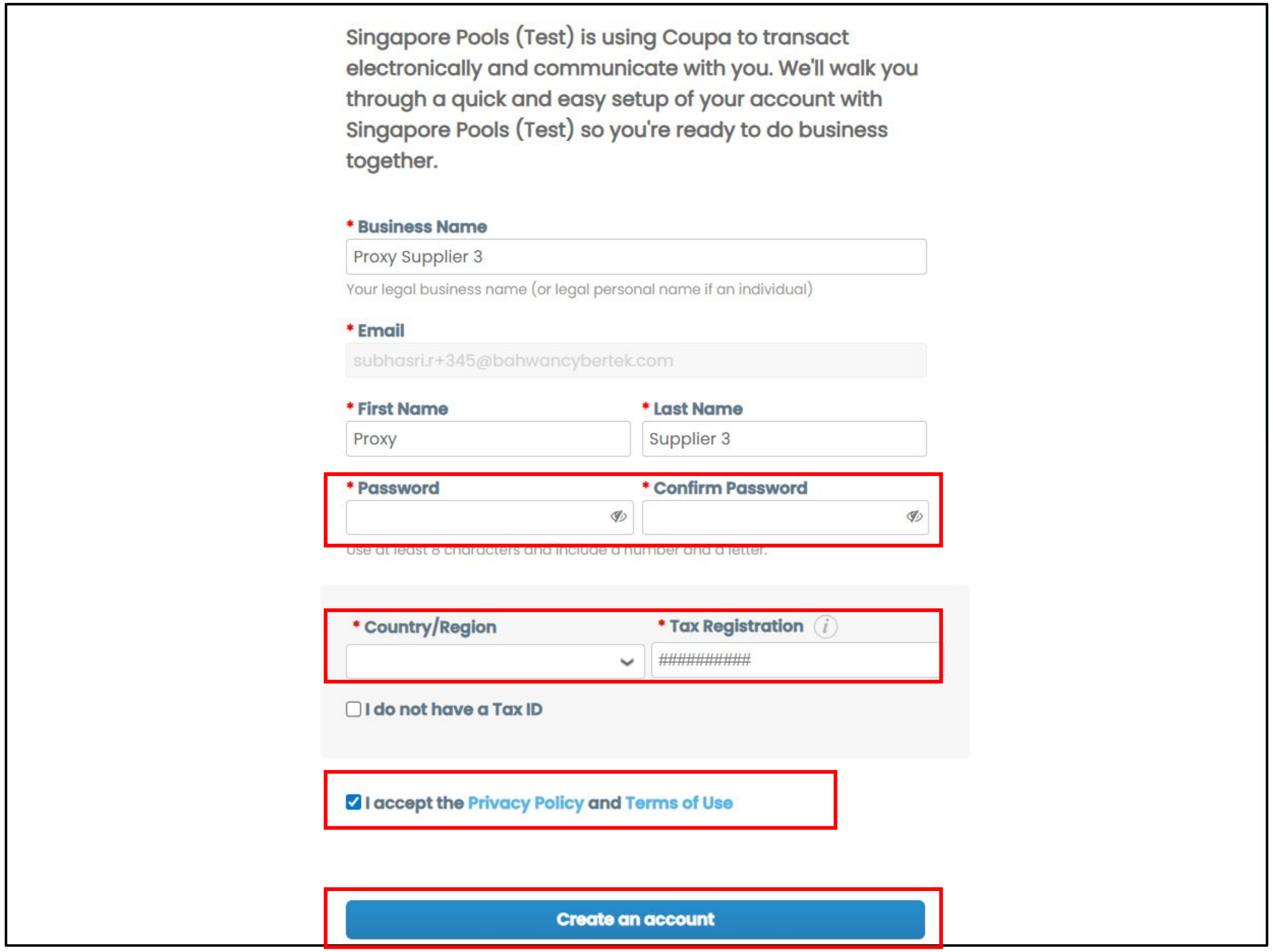
To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.

Welcome!

Join and Respond | Respond Without Joining

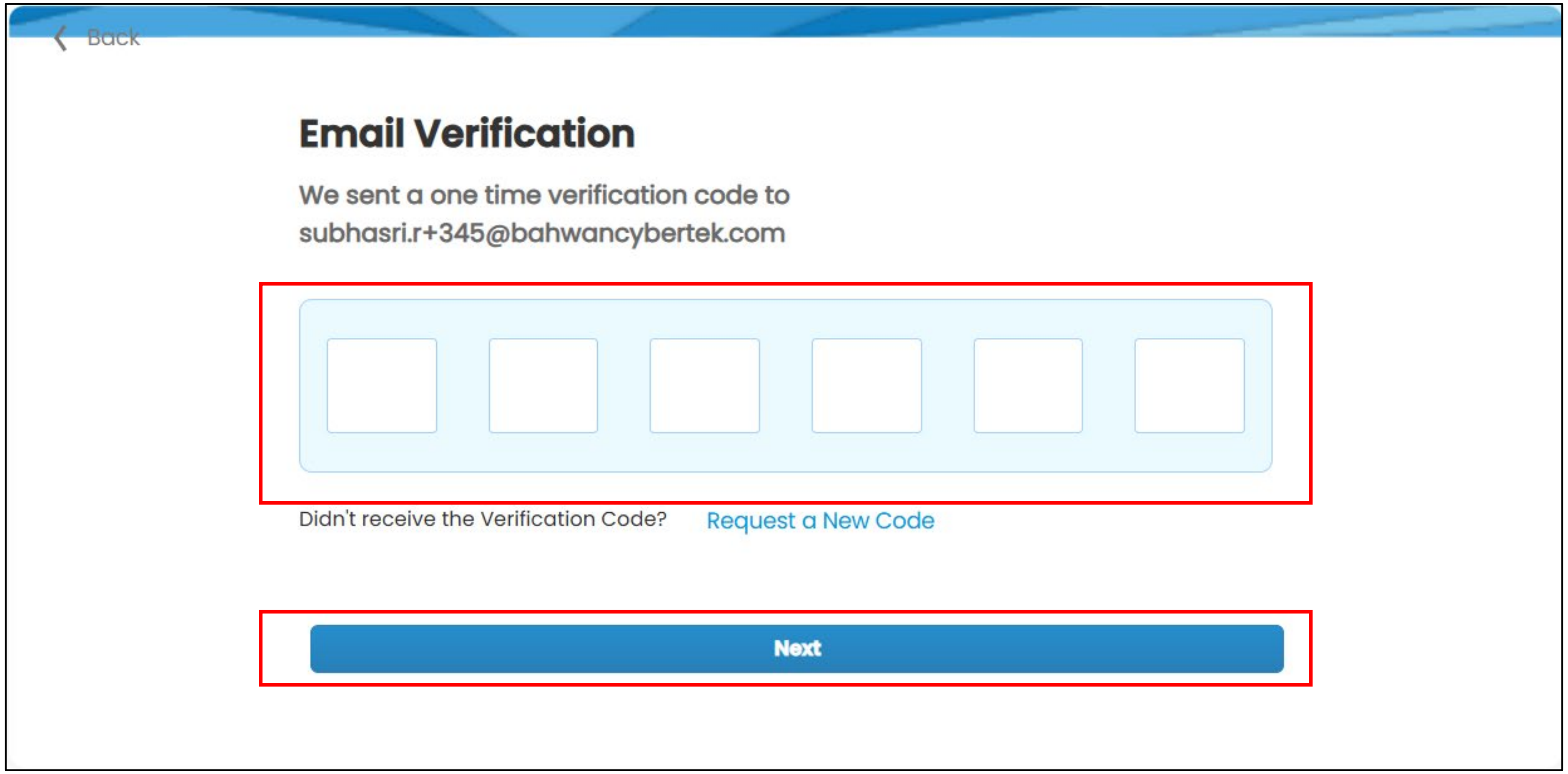
Supplier Steps for creating an Account on Coupa Supplier Portal (CSP)

Supplier will verify the details, create the **Password,** enter the **Country & Tax Code** and check the **I accept the Privacy Policy and the Terms of Use.** Next supplier will click on **Create an Account**.



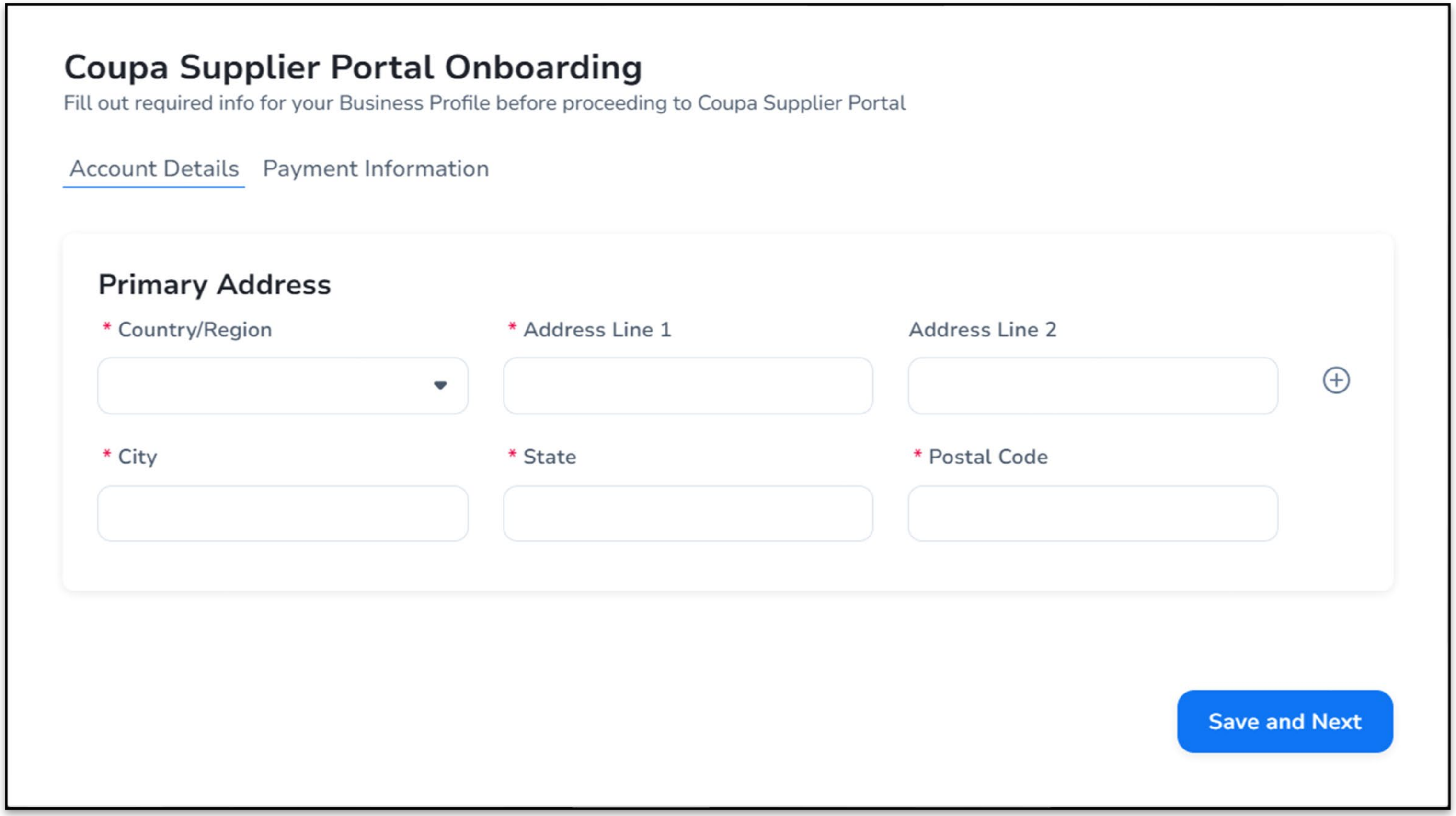
Supplier Steps for creating an Account on Coupa Supplier Portal (CSP)

As an additional security step the 2FA is triggered i.e., an OTP will be sent to your registered email address. Enter the OTP and click "Next."



Supplier Steps for creating an Account on Coupa Supplier Portal (CSP)

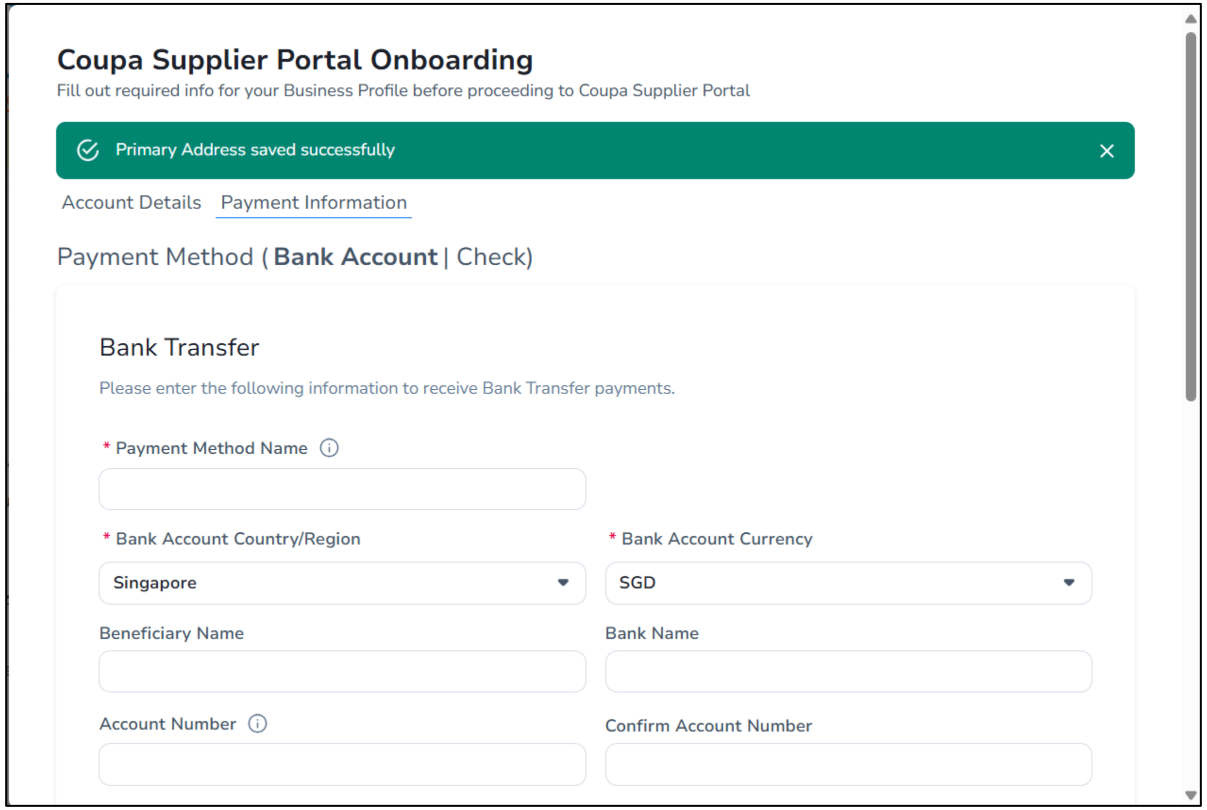
A pop up titled "**Coupa Supplier Portal Onboarding**" will appear.
Under the **Account Details** tab: Fill in the **Primary Address** and click **Next** (Fields marked in red asterisk are mandatory).

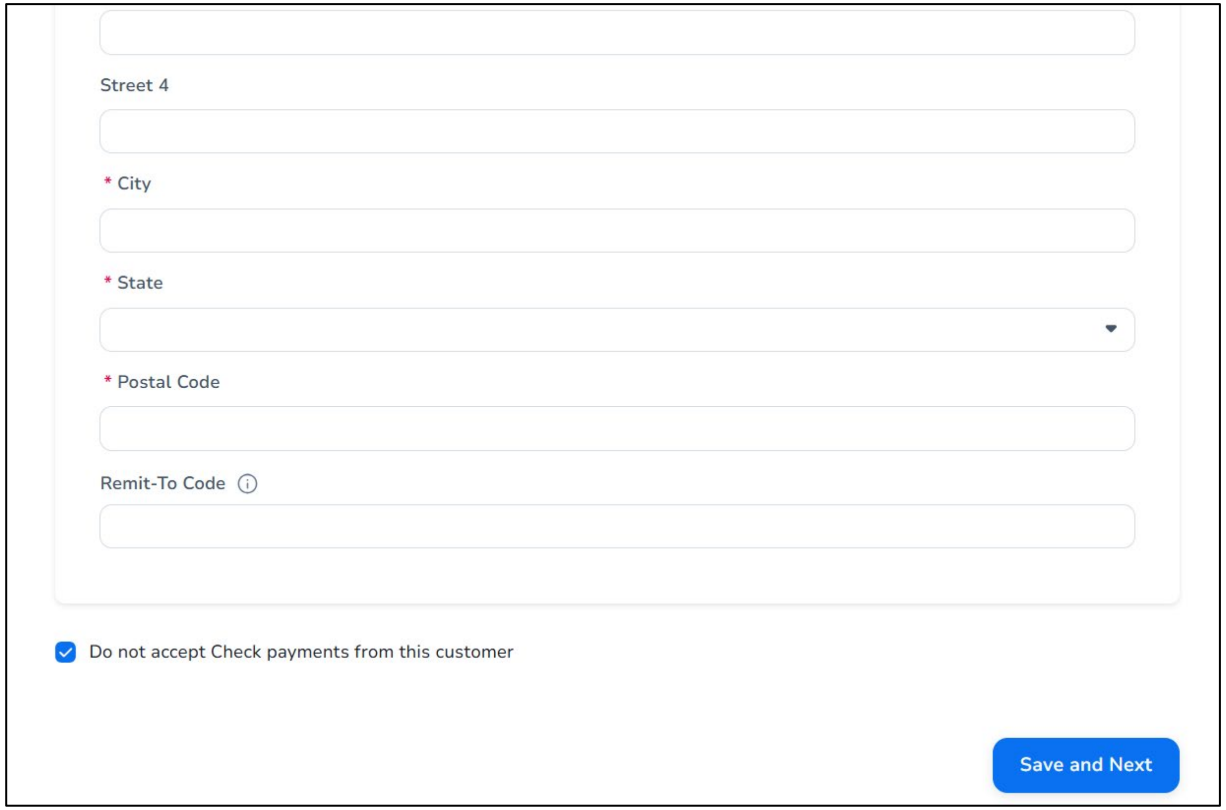


Supplier Steps for creating an Account on Coupa Supplier Portal (CSP)

Under Payment Information tab:

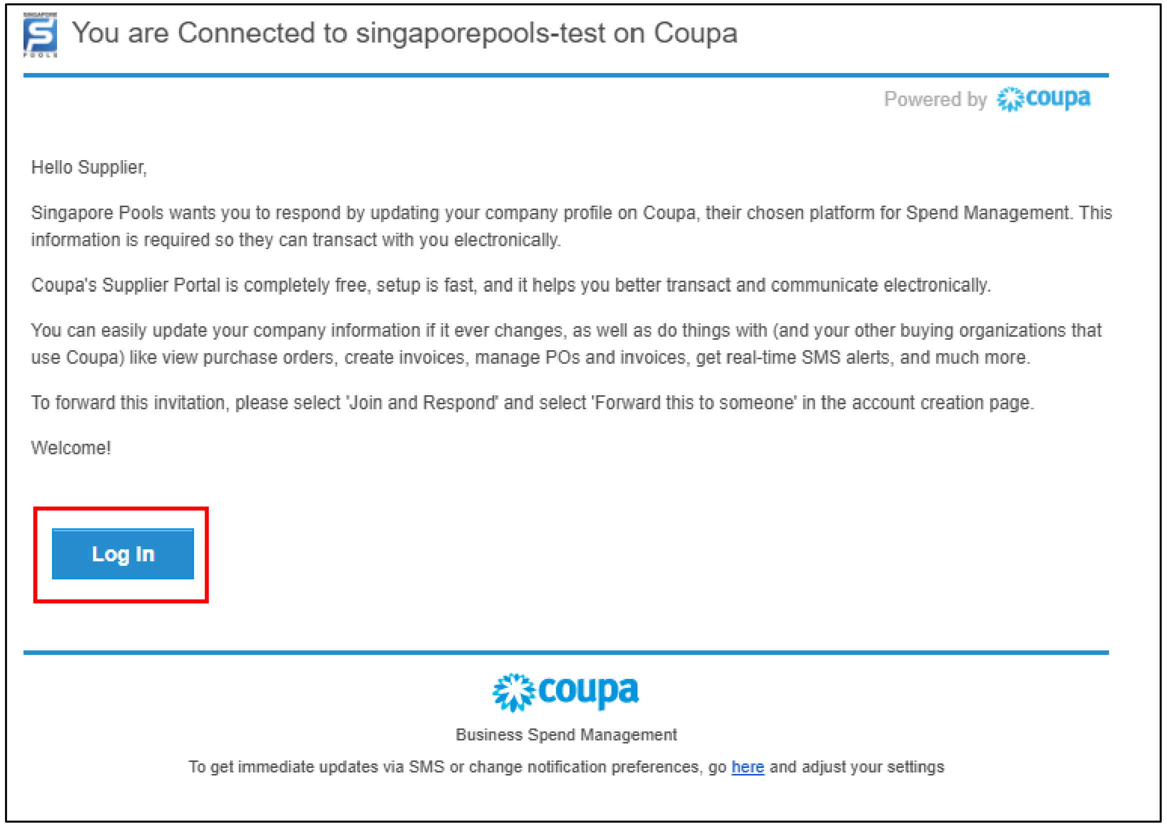
1. Check the box "**Do not accept Virtual Card payments from this customer "and** click "**Save and Next**".
2. Fill in the "**Bank Transfer**" details and click "**Save and Next**".
3. Check the box "**Do not accept Check payments from this customer**" and click "**Save and Next**".





Supplier already exists in Coupa

If the supplier is already onboarded on CSP, they will receive two emails.
Supplier clicks on either "Login" or "Update Info“.



You are Connected to singaporepools-test on Coupa

Powered by coupa

Hello Supplier,

Singapore Pools 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.

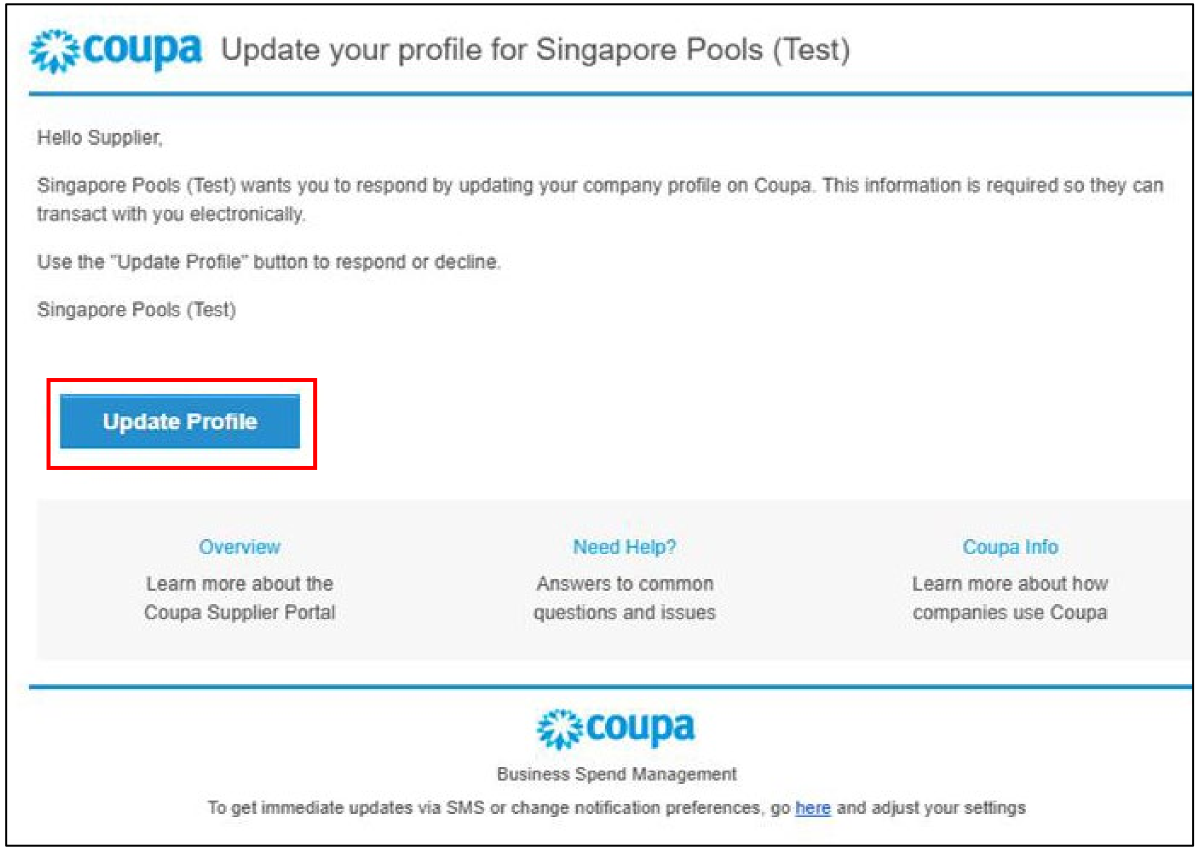
Welcome!

Log In

coupa

Business Spend Management

To get immediate updates via SMS or change notification preferences, go here and adjust your settings



coupa Update your profile for Singapore Pools (Test)

Hello Supplier,

Singapore Pools (Test) wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically.

Use the "Update Profile" button to respond or decline.

Singapore Pools (Test)

Update Profile

Overview	Need Help?	Coupa Info
Learn more about the Coupa Supplier Portal	Answers to common questions and issues	Learn more about how companies use Coupa

coupa

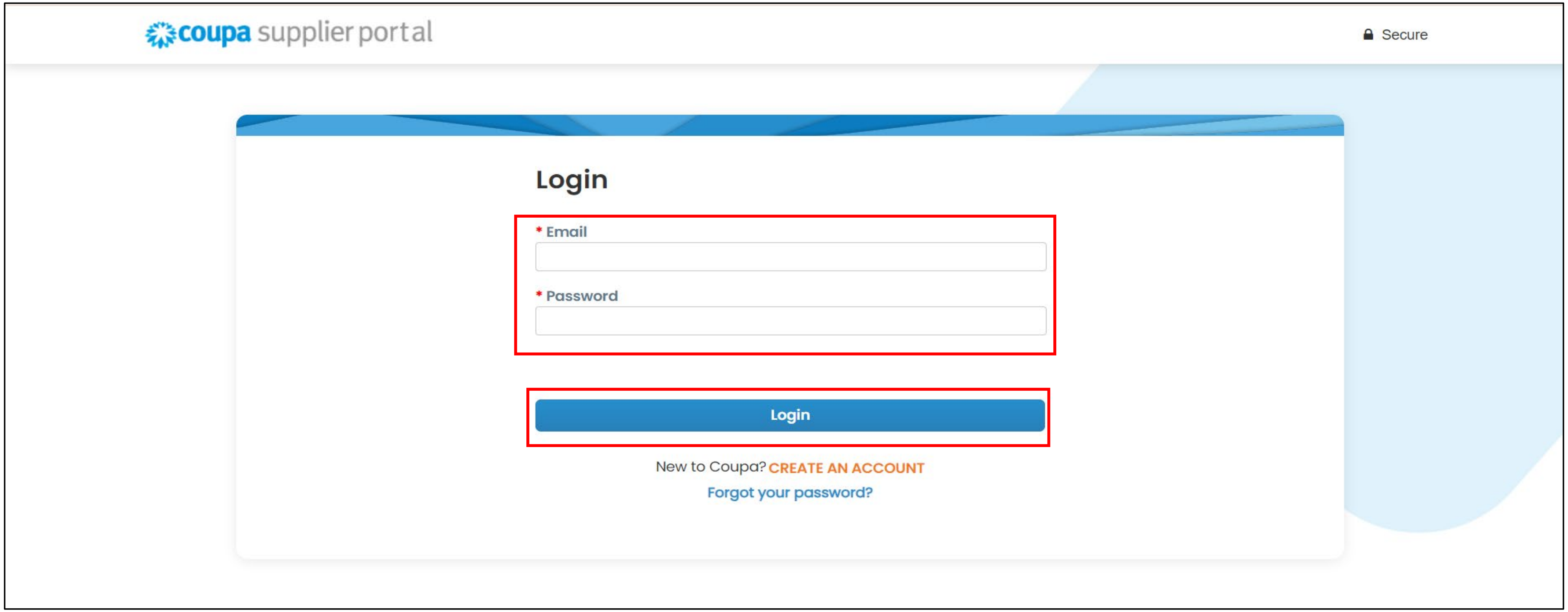
Business Spend Management

To get immediate updates via SMS or change notification preferences, go here and adjust your settings

Supplier already exists in Coupa

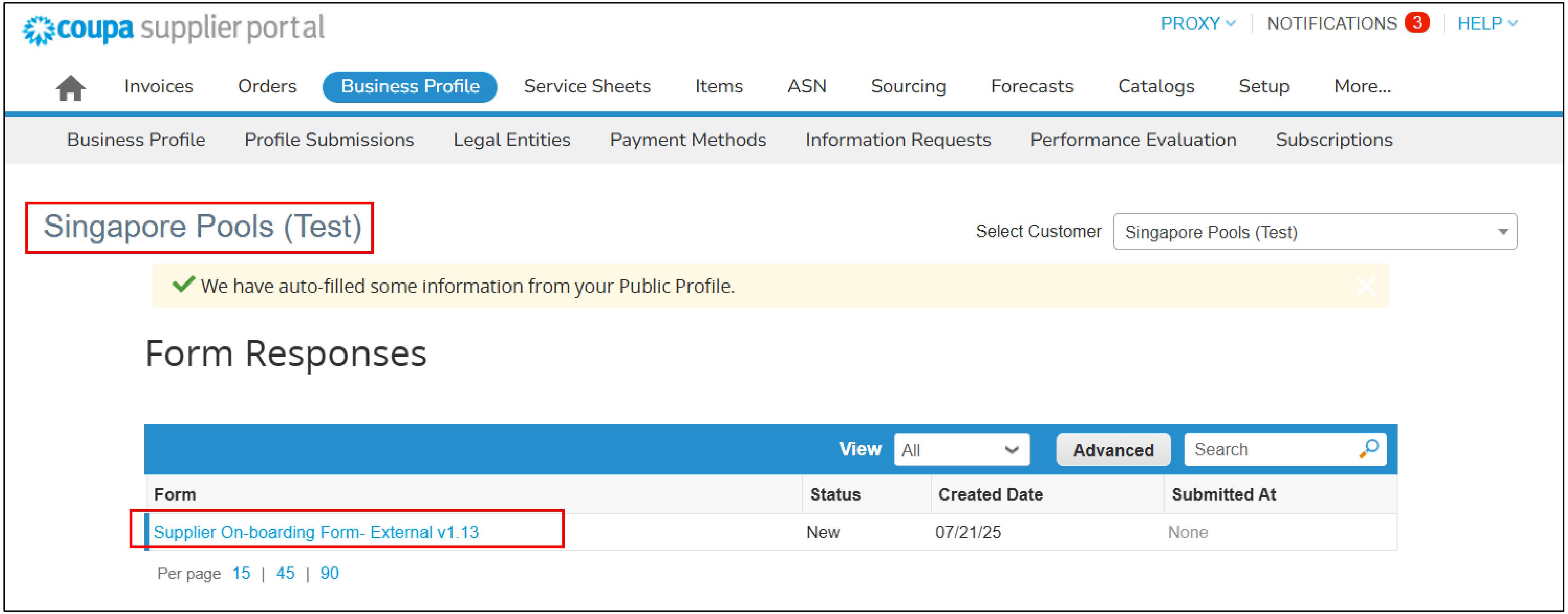
Click on already have an account

- Enter the email ID, Password and Click on Login button to enter the CSP.



Supplier Steps

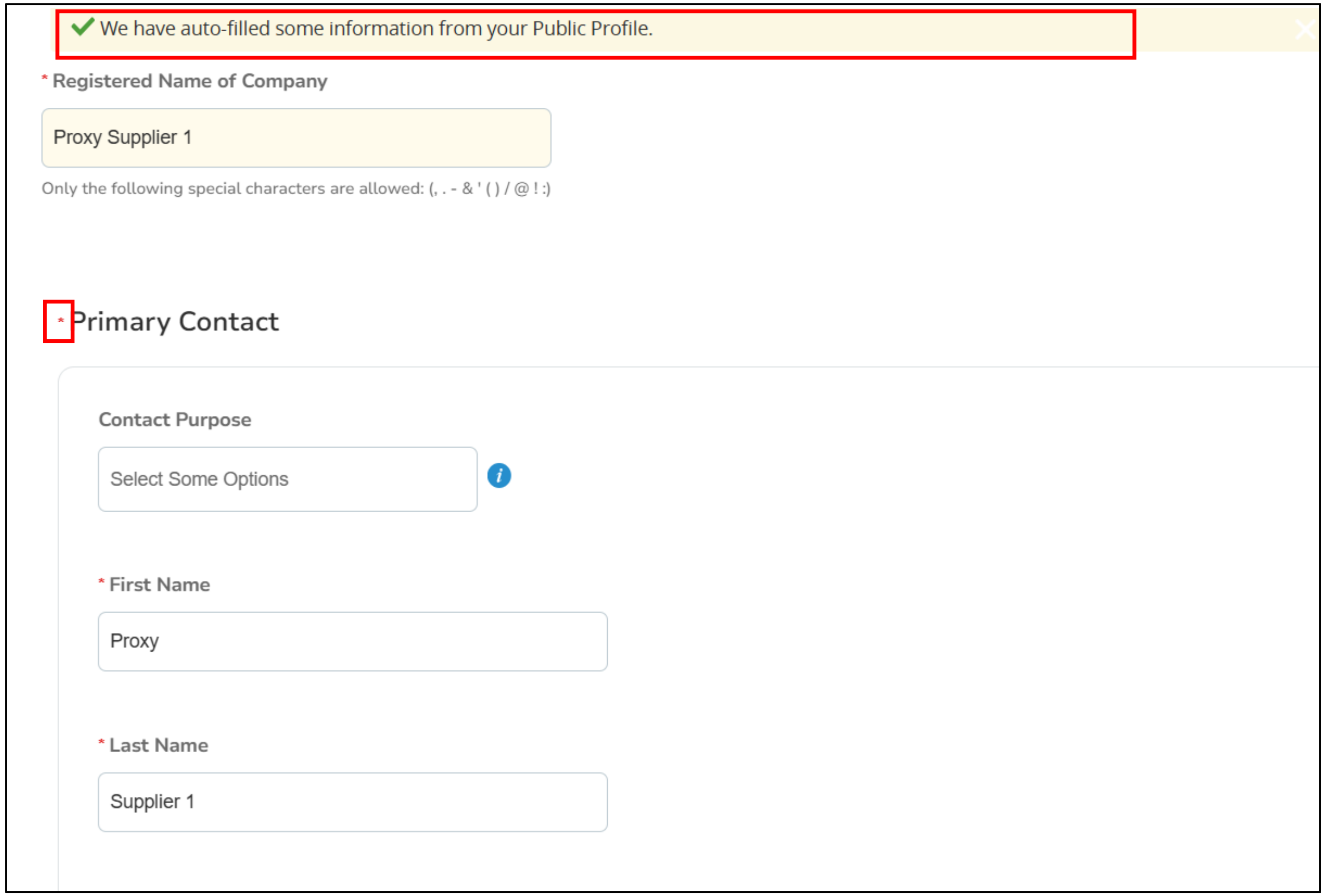
A tab titled "**Singapore Pools**" will pop up. Under Form Response, select "**Supplier On-boarding Form - External.**"



Supplier Steps

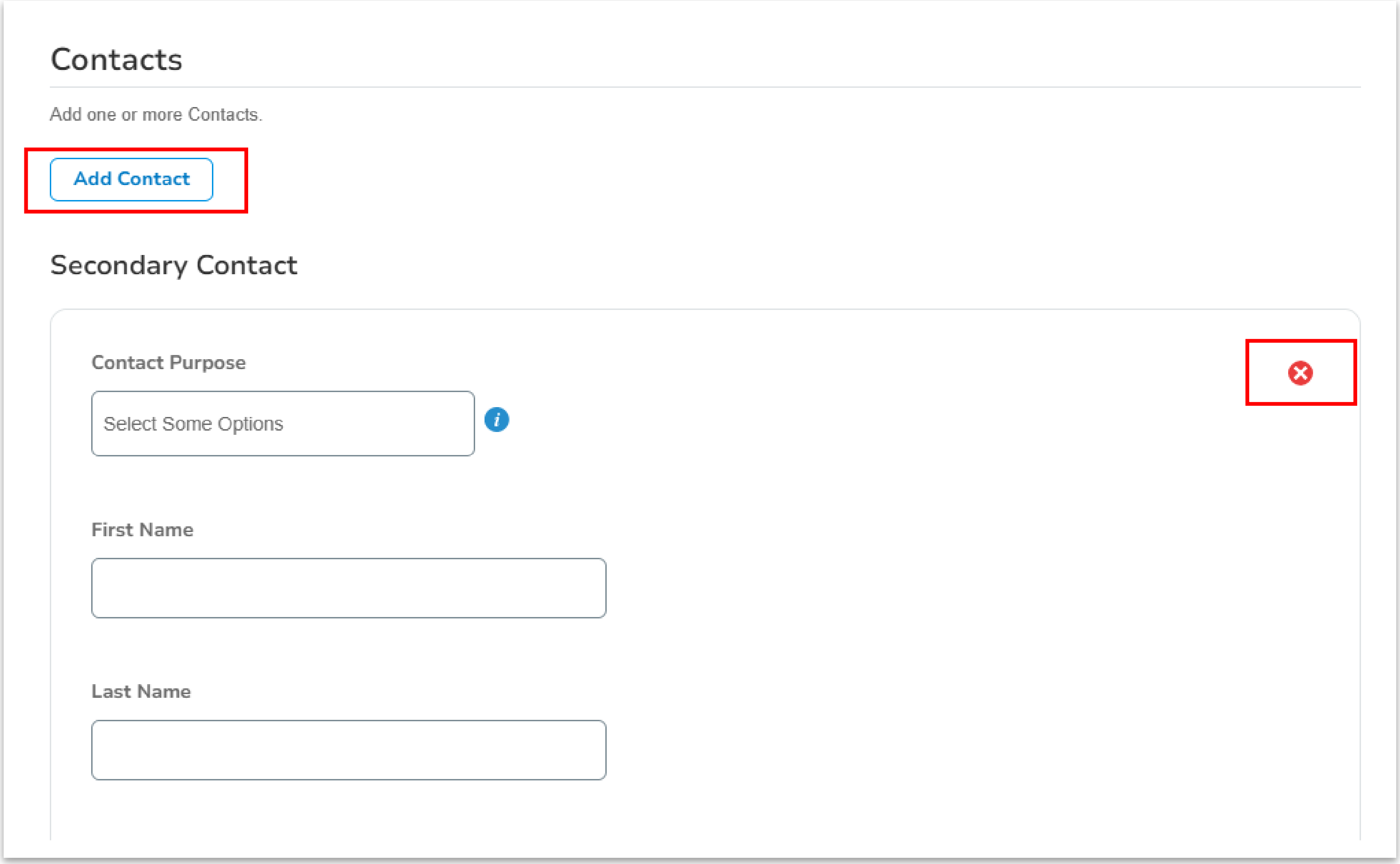
1. On this page, Coupa would have auto populated some key information of your company details which SPPL requestor had filled while creating a **New Supplier Request- External Form**.

2. The supplier must fill in all mandatory details requested by the requestor, which are marked with a red asterisk (*) next to each field.



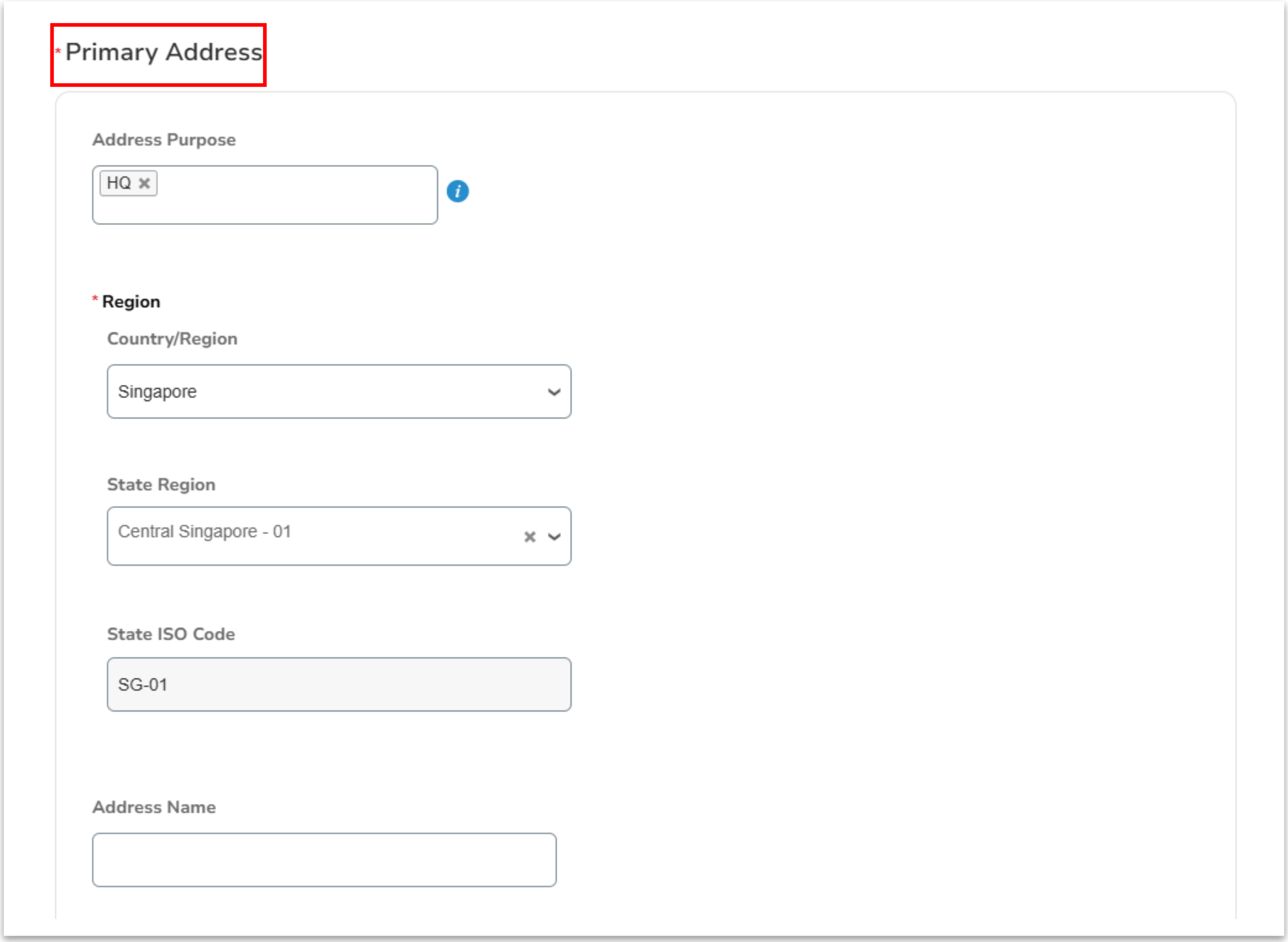
Supplier Steps

1. Supplier should fill in the **Primary Contact** if it has not been provided.
2. If the supplier has a **Secondary Contact**, they can enter the details in the Secondary Contact section as well. If not, they can click on the "X" icon.



Supplier Steps

Supplier should fill in the **Primary Address** if it has not been provided.



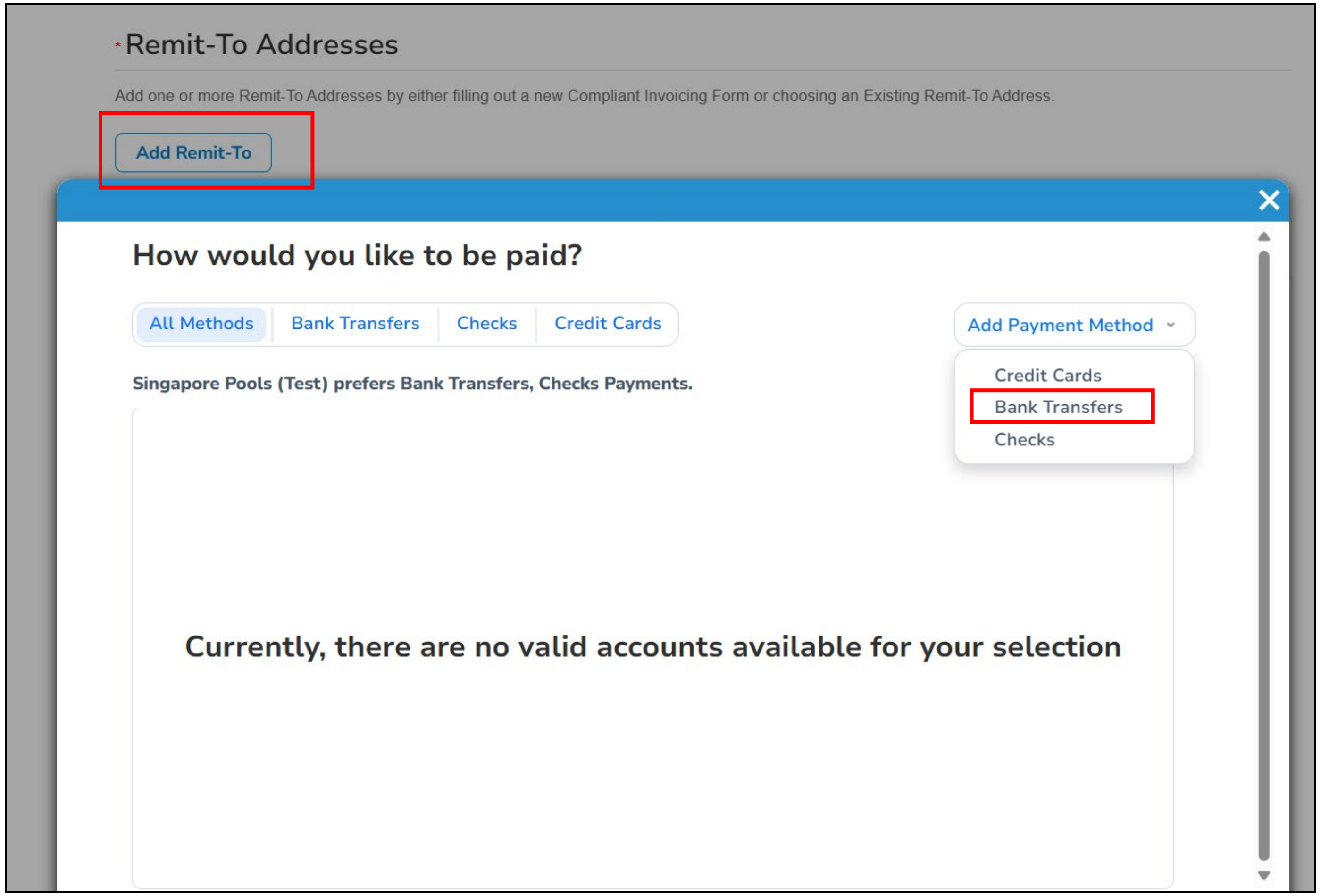
Supplier Steps

Supplier will complete the **Remit-To Addresses** section.

1. They should click on the "**Add Remit-To**" button, which will trigger a pop-up window for selecting banking information.

2. In the pop-up, the supplier should navigate to the **Add Payment Dropdown** >> **Bank Transfers**. Fill in all the banking Details and click **Save** >> **Close**.

3. Some fields will be pre-populated automatically. However, the supplier will need to manually input the following fields:
Bank Code, Bank Key, Bank Address, Bank City, Bank Postal Code & Email Address (to receive payment advice).

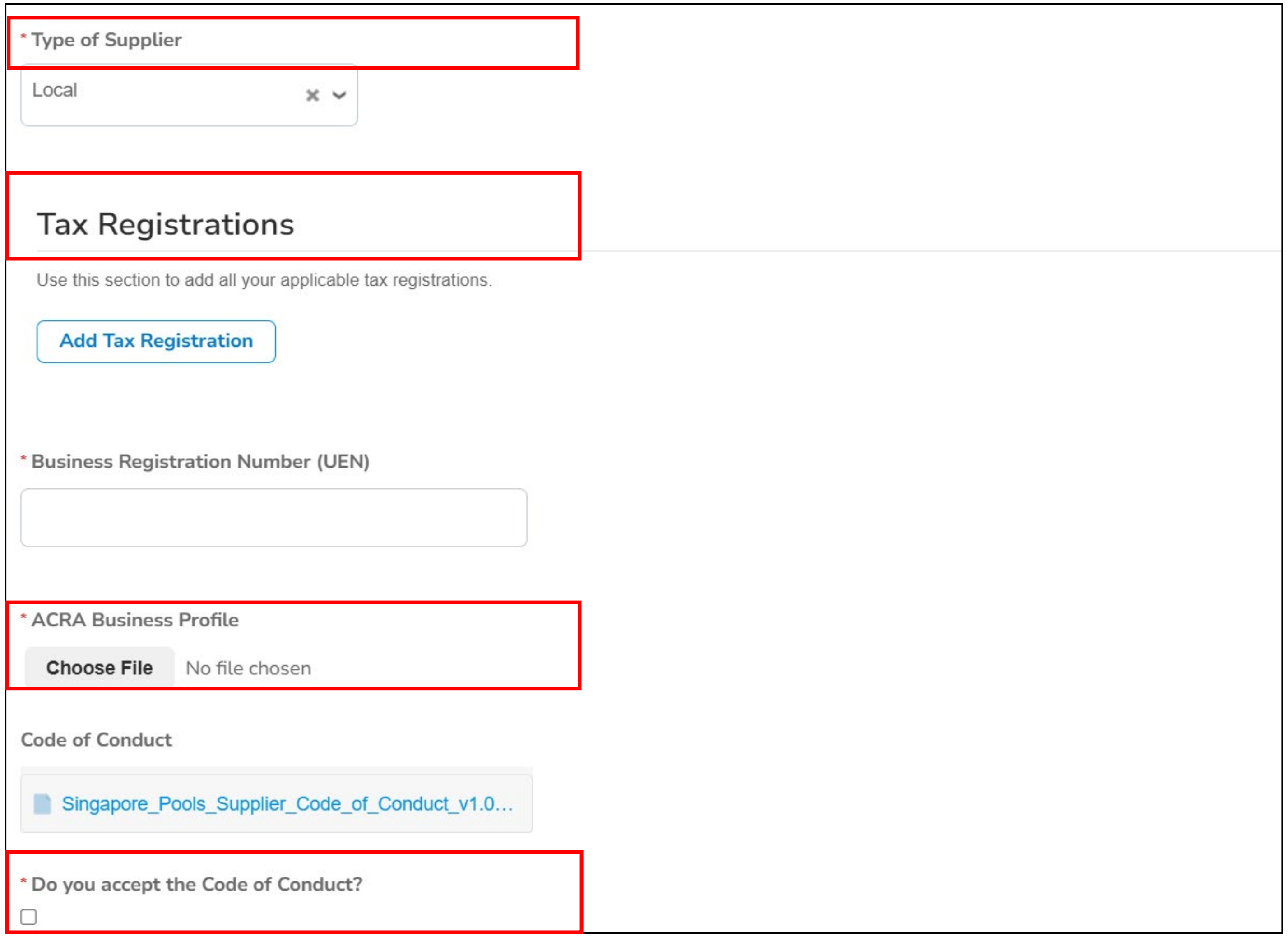


Supplier Steps

1. Supplier will select the "**Type of Supplier**" from the dropdown list.
If the supplier is **Local**, **UEN number and** uploading the **ACRA Certificate** is mandatory.
If the supplier is **Foreign**, they can attach their Certificate of Residency.

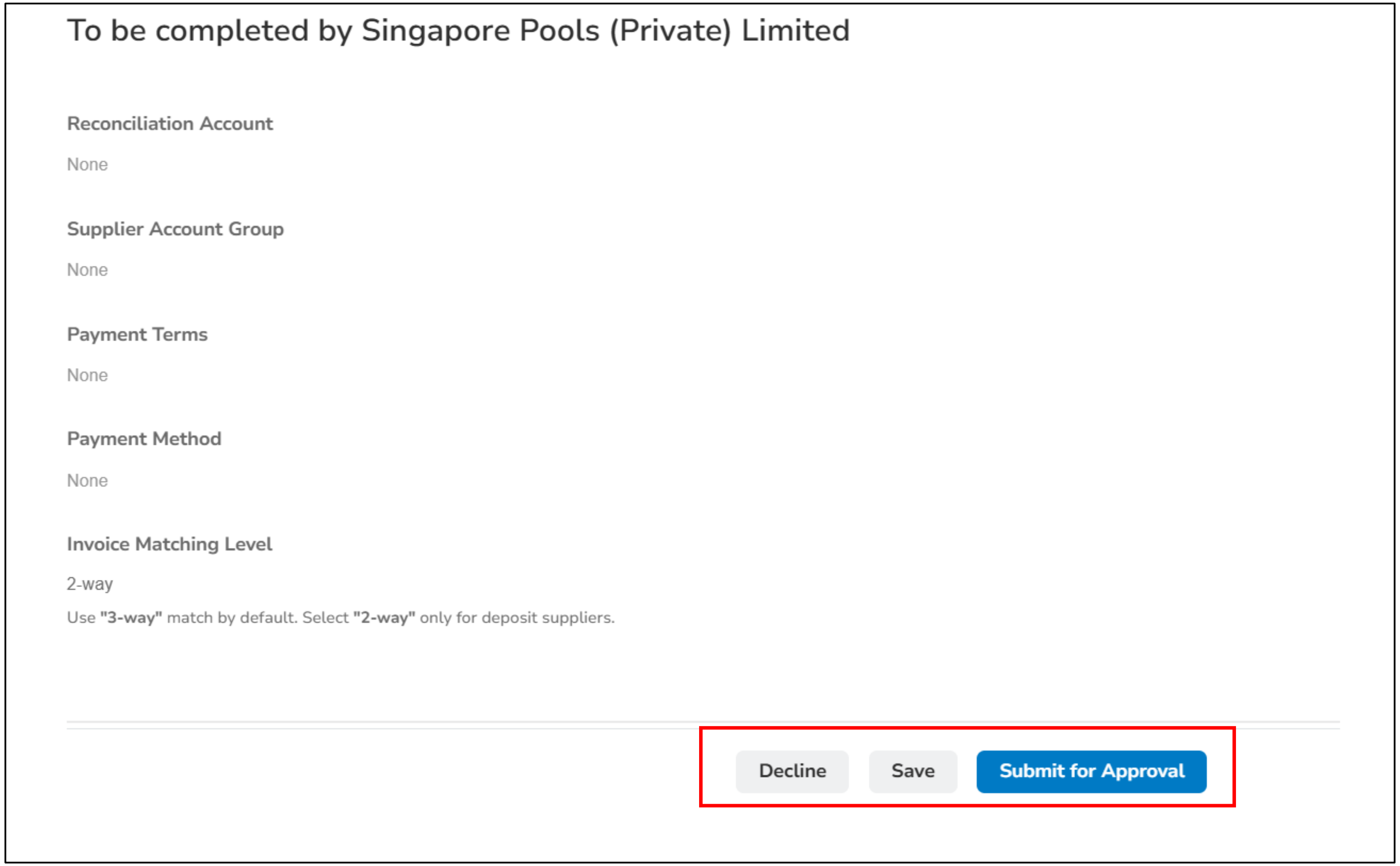
2. Supplier will validate the **Tax registration details** which is pre-populated (if added by the requester).

3. If the supplier agrees to the terms in the attached code of Conduct, they should check the box under "**Do you accept the Code of Conduct?**" to confirm their acceptance.



Supplier Steps

- Supplier can also save this form as a Draft by clicking on "**Save as Draft**" button.
- Click on **Submit for Approval.**
- Supplier can also withdraw the supplier on boarding form by clicking on "Decline" button.



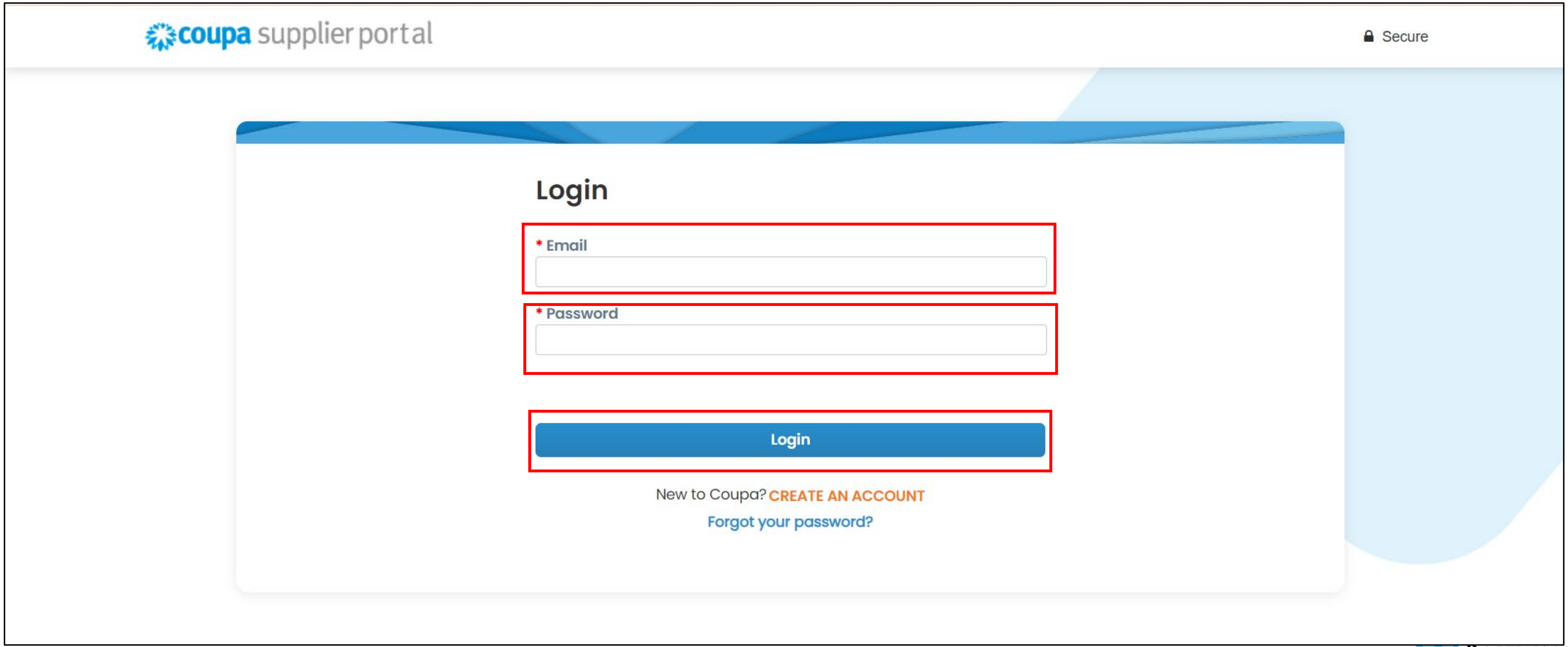
Supplier Section

- Supplier will log in to Coupa Supplier Portal (CSP)
- Supplier will update their details pro-actively by clicking on Update info button present at the bottom of the form.

Supplier Steps

If the Supplier needs to proactively update their information, they can login to their CSP account.

- Enter the Email & Password to login.
- Enter the email ID
- Enter the Password
- Click on Login button to enter the CSP.



Supplier Steps

- The supplier can access the details by navigating to Business Profile > Information Requests.
- The approved form will be available here and once all the details are updated, scroll to the bottom to update the information by clicking on "Update Info“.

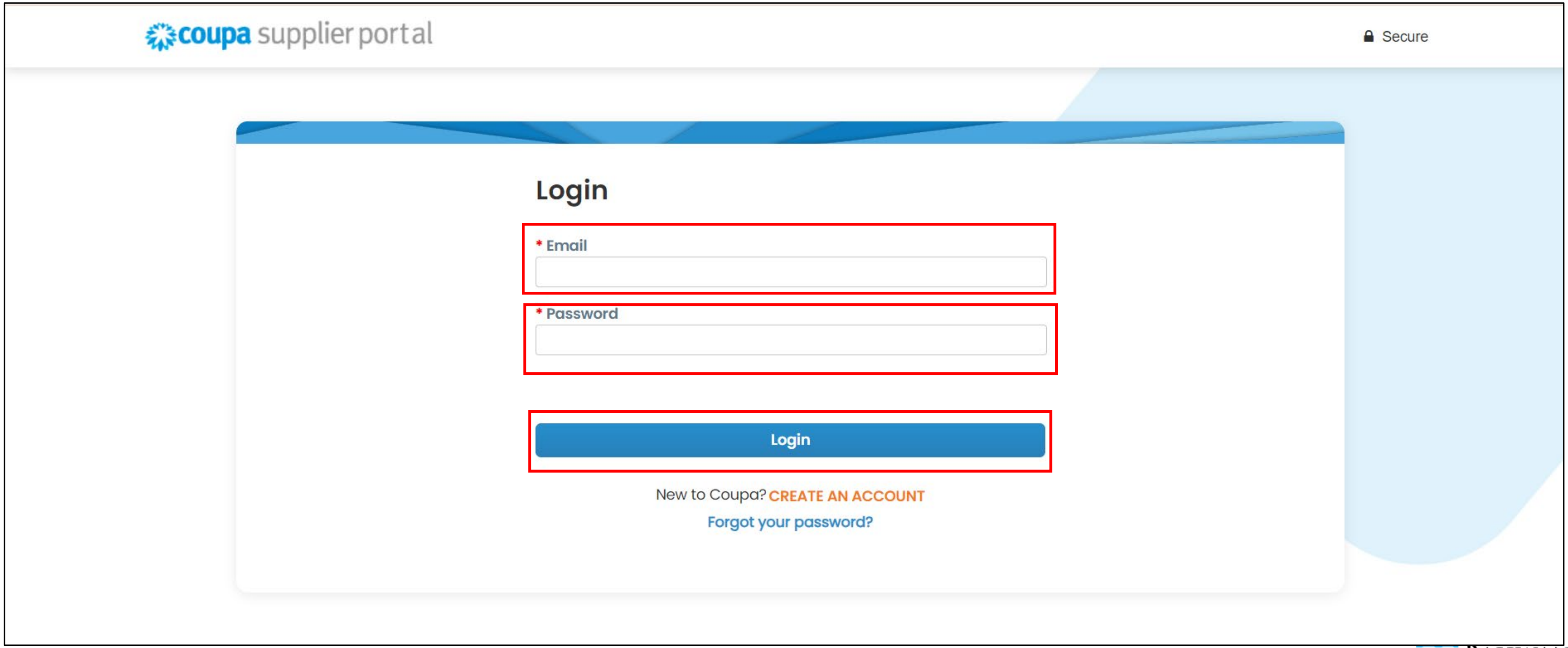
Supplier Section

- Supplier will log in to Coupa Supplier Portal (CSP)
- Supplier will update their details as requested by SPPL Requester and submit the form for approval.

Supplier Steps

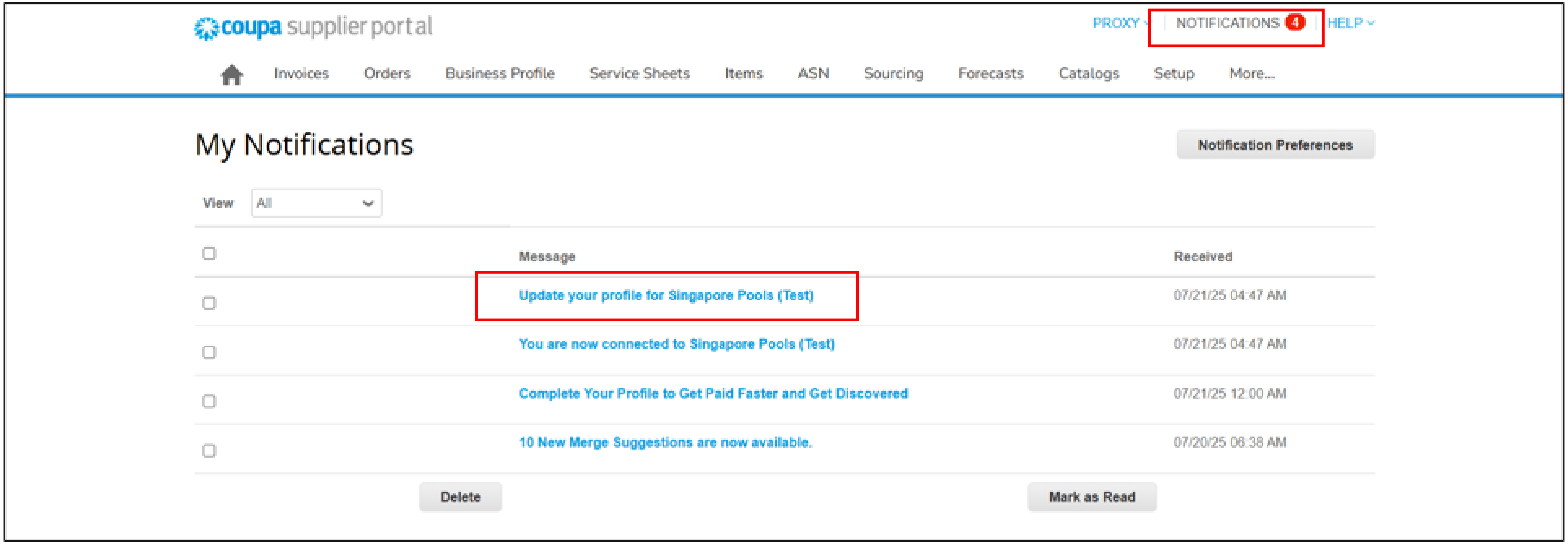
If the Supplier needs to respond to a request update required from the requestor, they can login to their CSP account.

- Enter the Email & Password to login.
- Enter the email ID
- Enter the Password
- Click on Login button to enter the CSP.



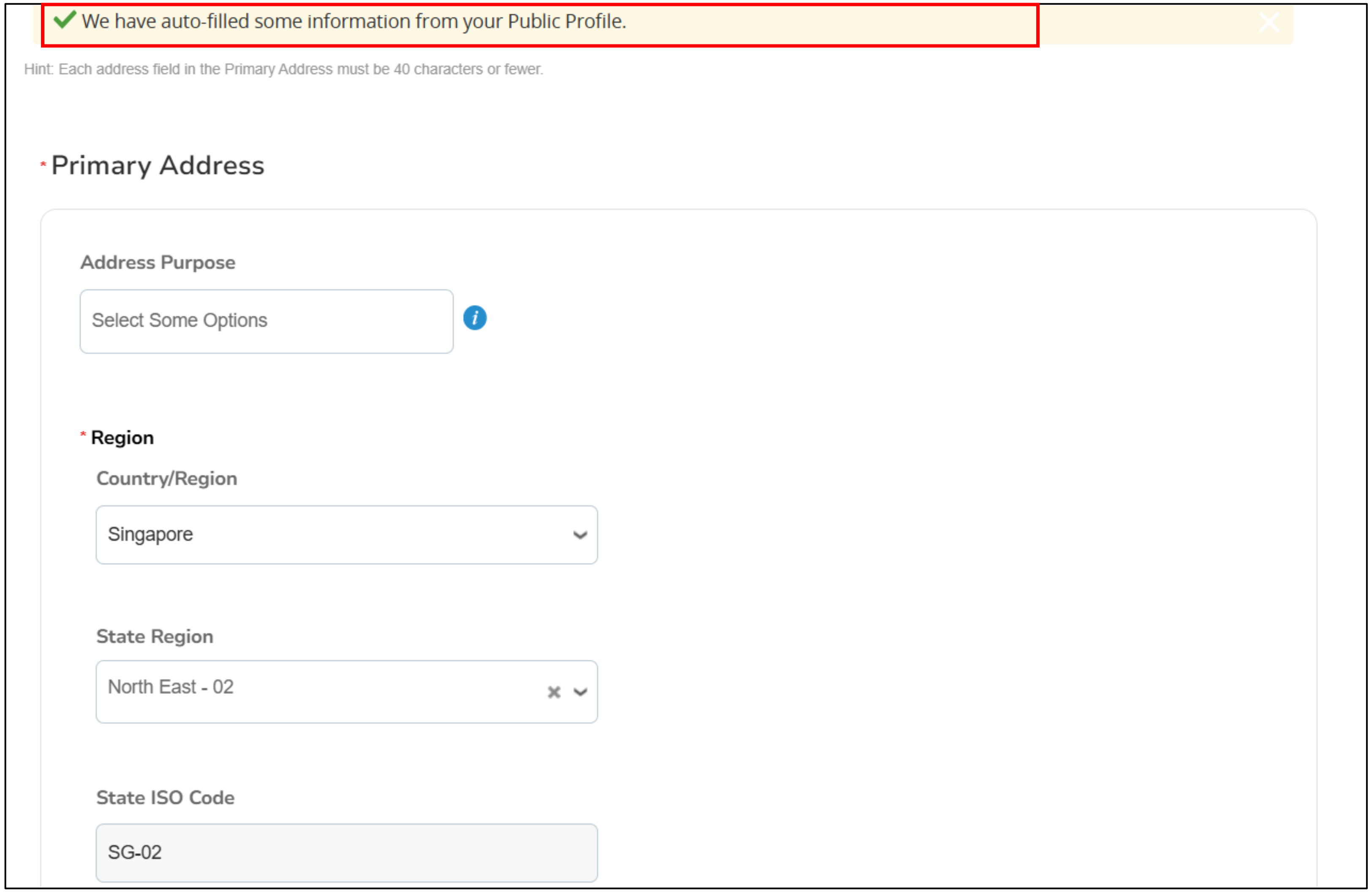
Supplier Steps

- Supplier can navigate to their **Notification** section to view the form, Click on the **Update your profile for Singapore Pools (Test)**
- Additionally, supplier can navigate to **Business Profile >> Information Requests** >> Click on the **Required information form received from SPPL.**



Supplier Steps

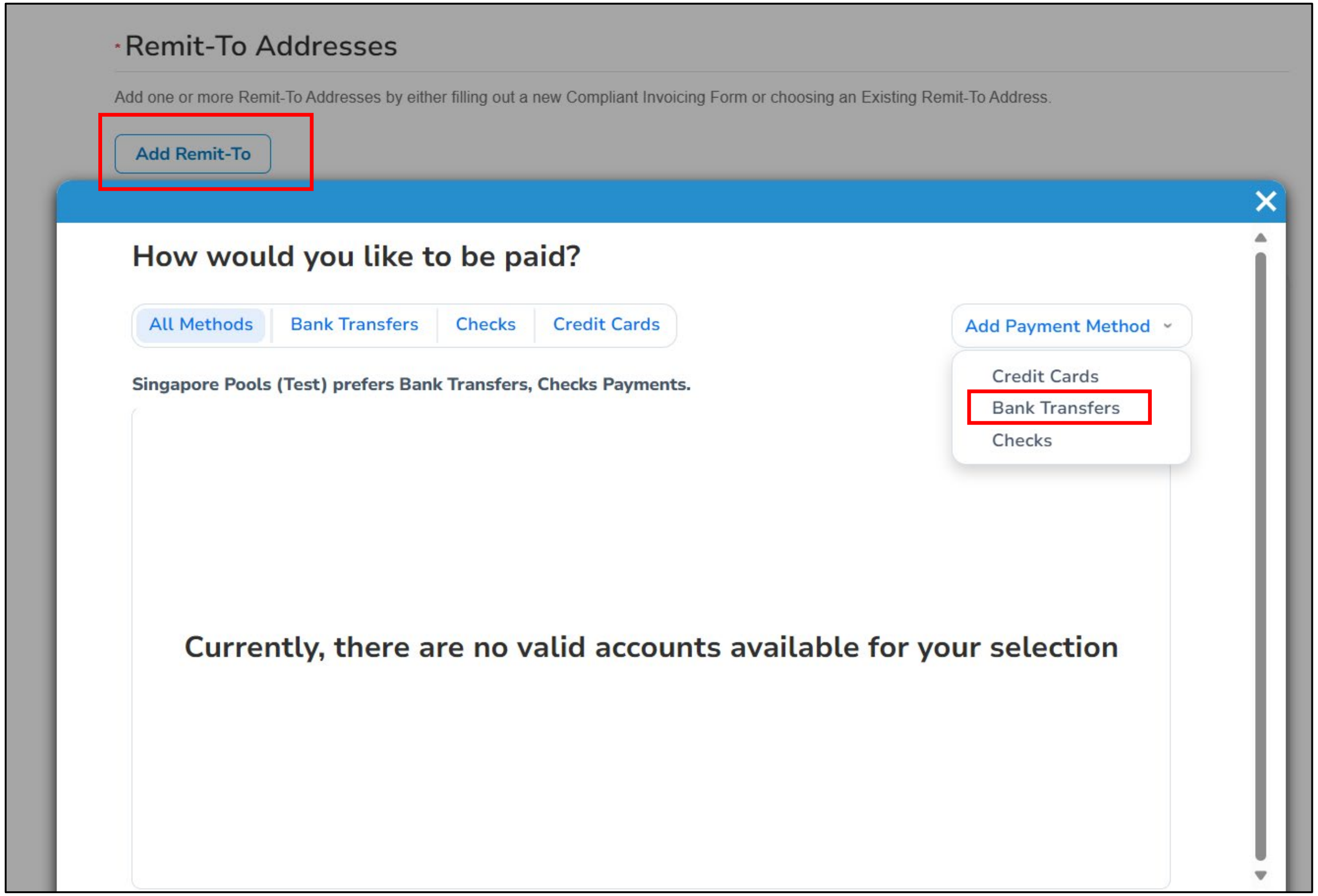
On this page, the existing fields will be prepopulated from the previous data. Supplier can update the required details.



Supplier Steps

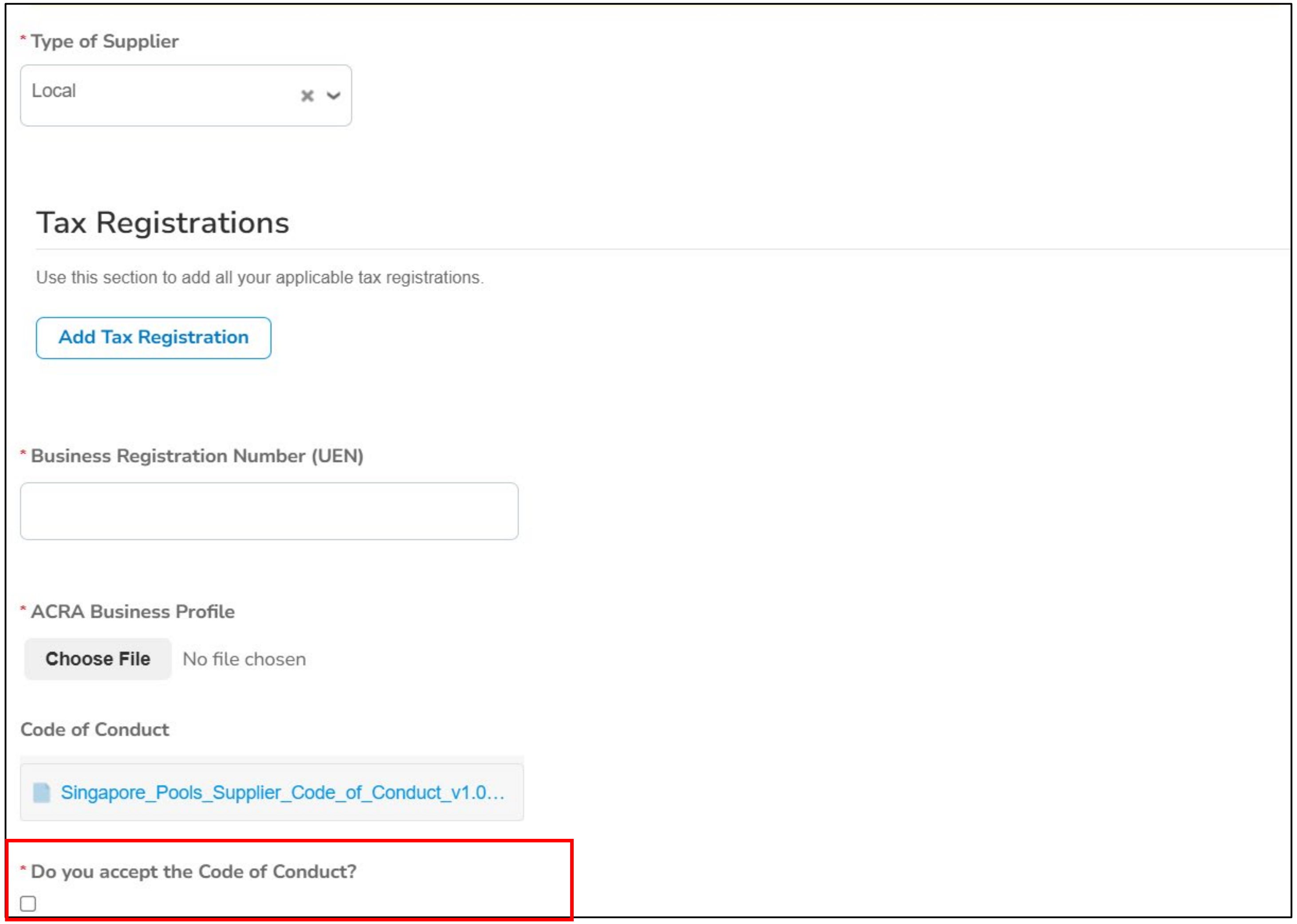
- To update the Banking Information supplier will click on **Add Remit-To** button, which will trigger a pop-up window for selecting banking information.
- In the pop-up, the supplier should navigate to the **Add Payment Dropdown** >> **Bank Transfers**. Fill in all the banking Details and click **Save** >>**Close**.
- Next, supplier will fill in the additional banking details requested by SPPL like Bank Key, Bank Address, Bank City and other relevant mandatory fields.

Note: Supplier cannot update their banking details, they can only add a new bank or delete an existing bank.



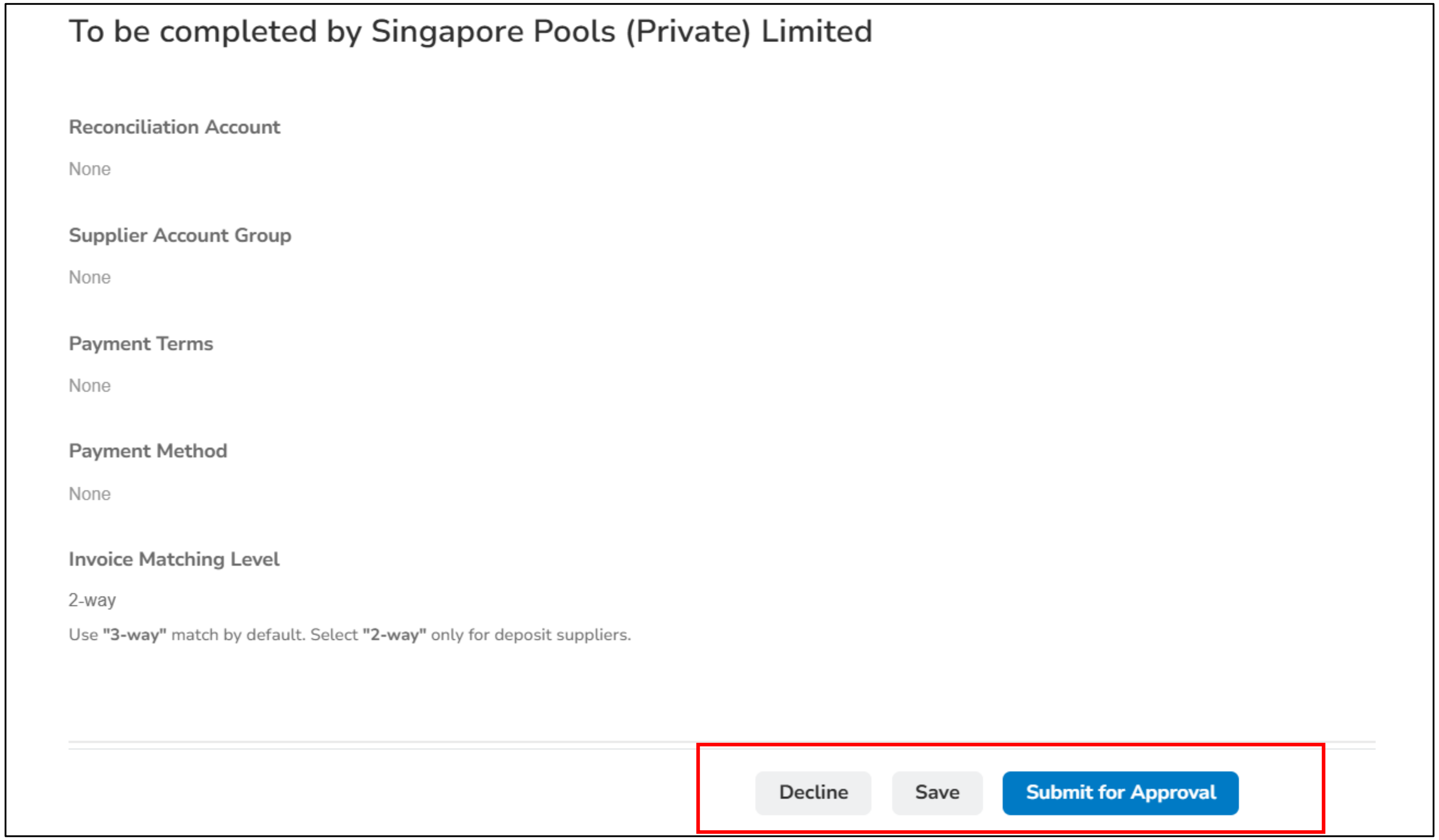
Supplier Steps

If the supplier agrees to the terms, they should check the box under "**Do you accept the Code of Conduct?**" to confirm their acceptance.



Supplier Steps

- Supplier can also save this form as a Draft by clicking on "**Save as Draft**" button.
- Click on **Submit for Approval**. Supplier can also view the status of the form by navigating to **Business Profile >> Information Requests.**
- Once submitted for Approval, the form will undergo an approval process with the AP Team.

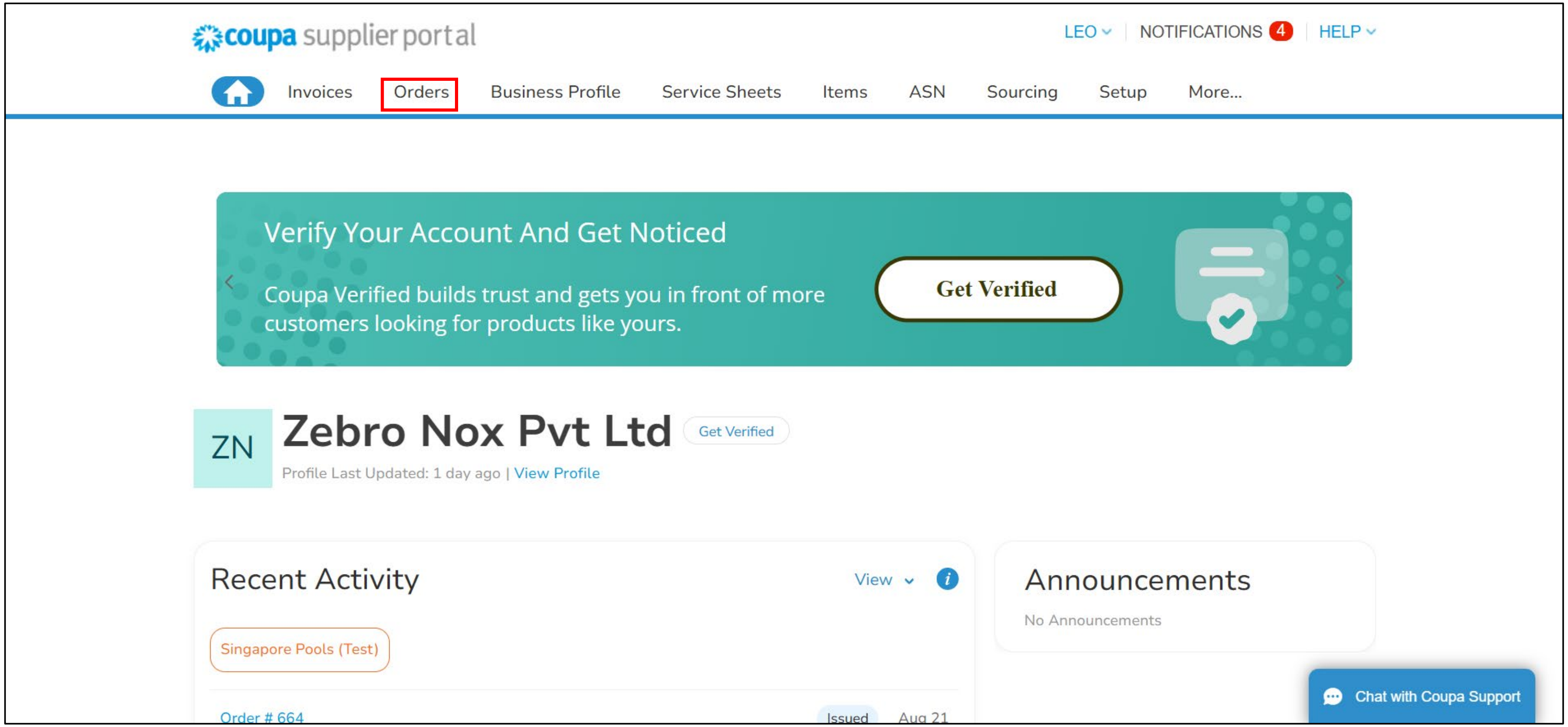


Supplier Section

- Supplier will log in to Coupa Supplier Portal (CSP)
  - ❑ Supplier will Acknowledge Order

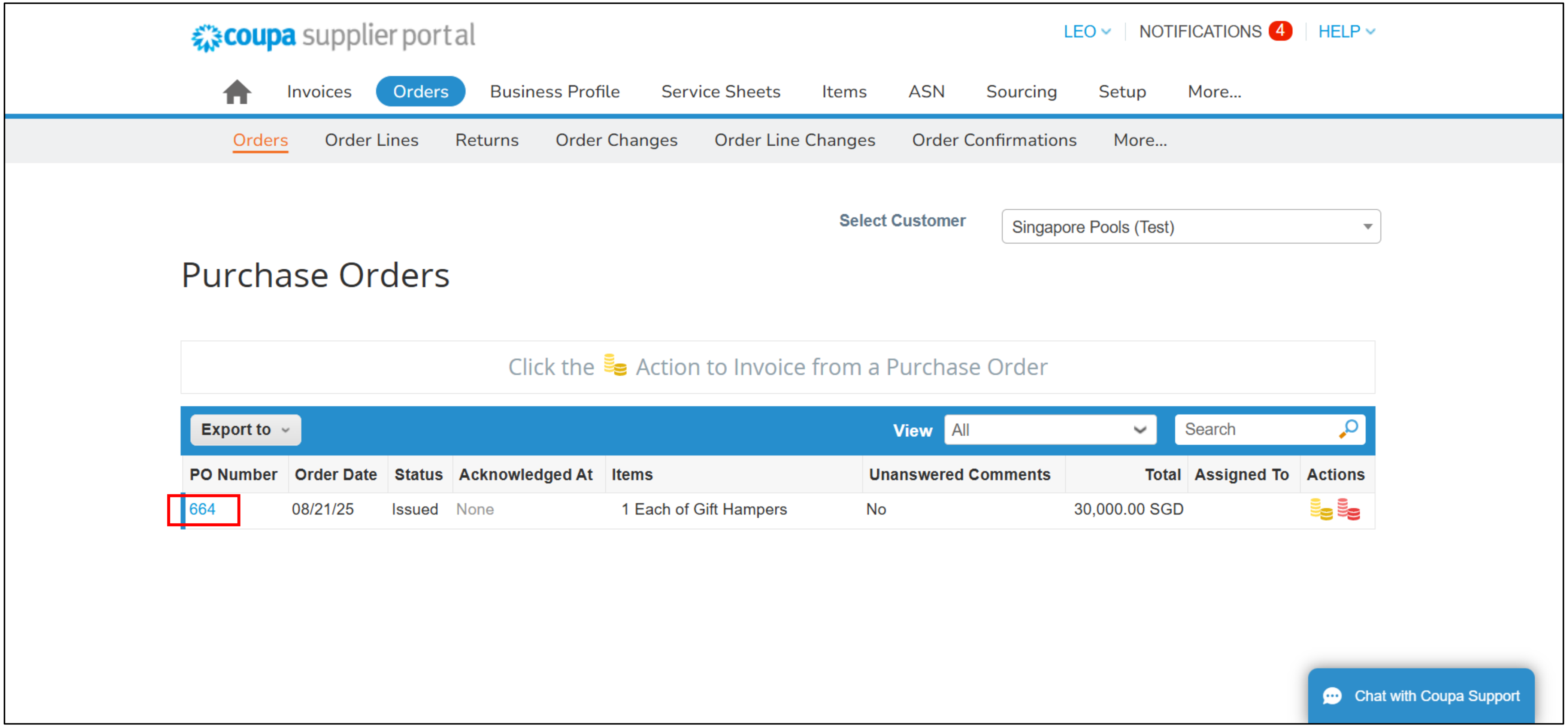
Supplier Steps

- Supplier will log in to Coupa Supplier Portal
- Once Supplier logs in, Supplier will land on Home page of CSP.
- Click on “Orders” tab.



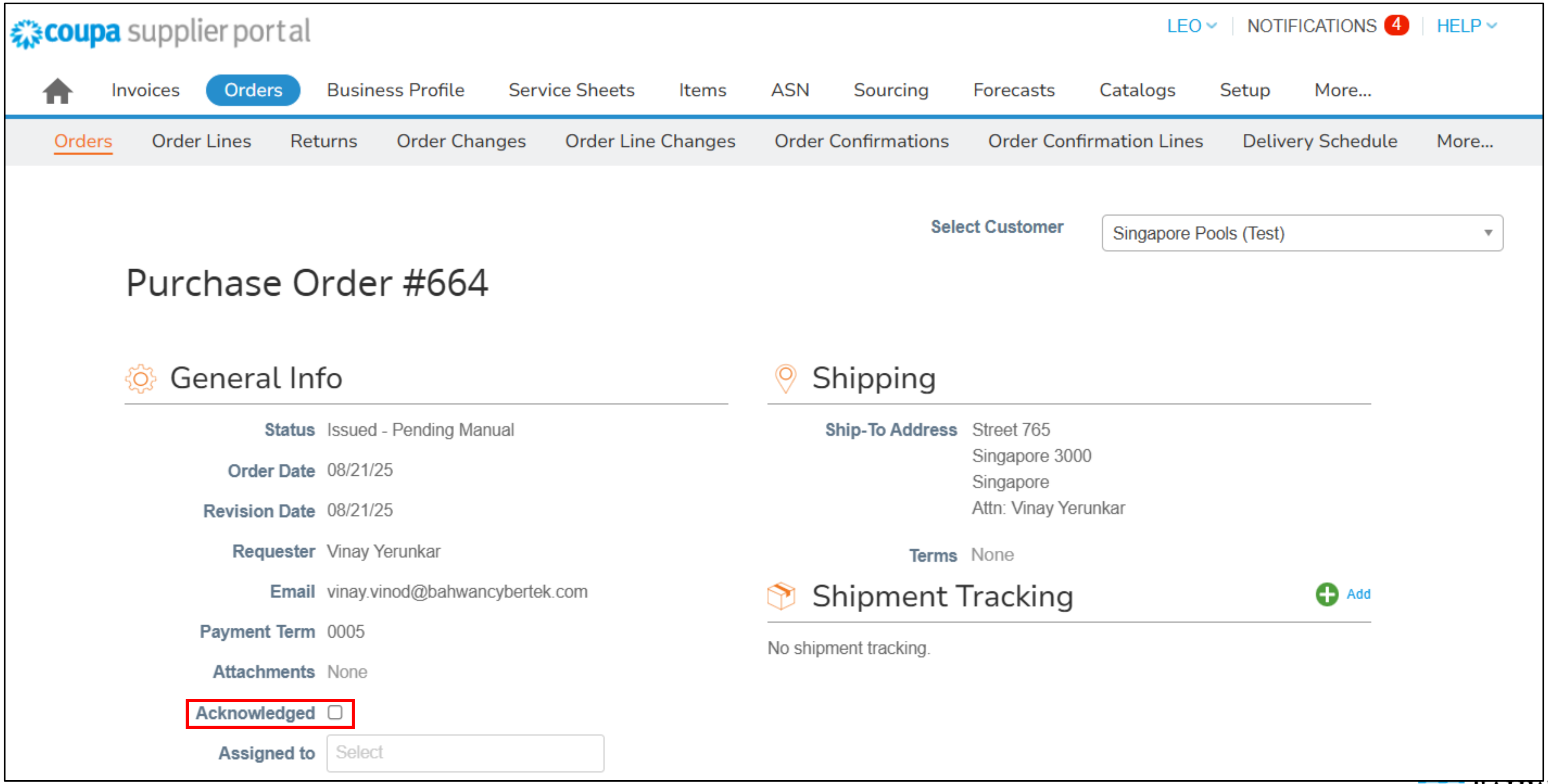
Supplier Steps

- Supplier will be able to see “Purchase Orders” section
- Supplier will click on the “PO Number” to view the order



Supplier Steps

- Supplier will be able to view the “Purchase Orders”.
- Supplier will click on the “Acknowledged” check box to Acknowledge the order



Supplier Section

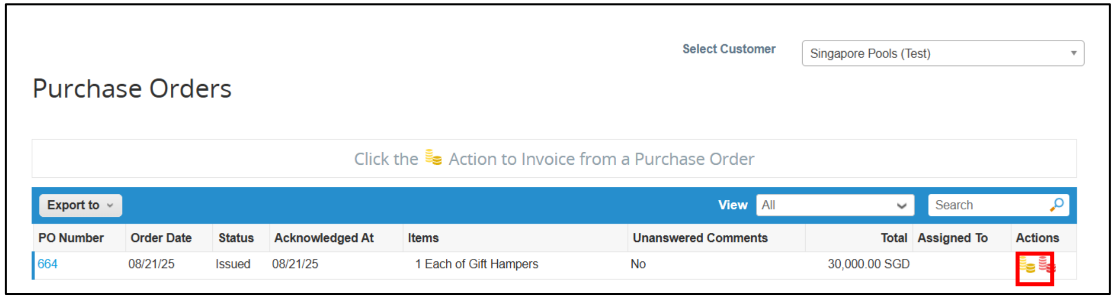
- Supplier will log in to Coupa Supplier Portal (CSP)
  - ❑ Create Invoice

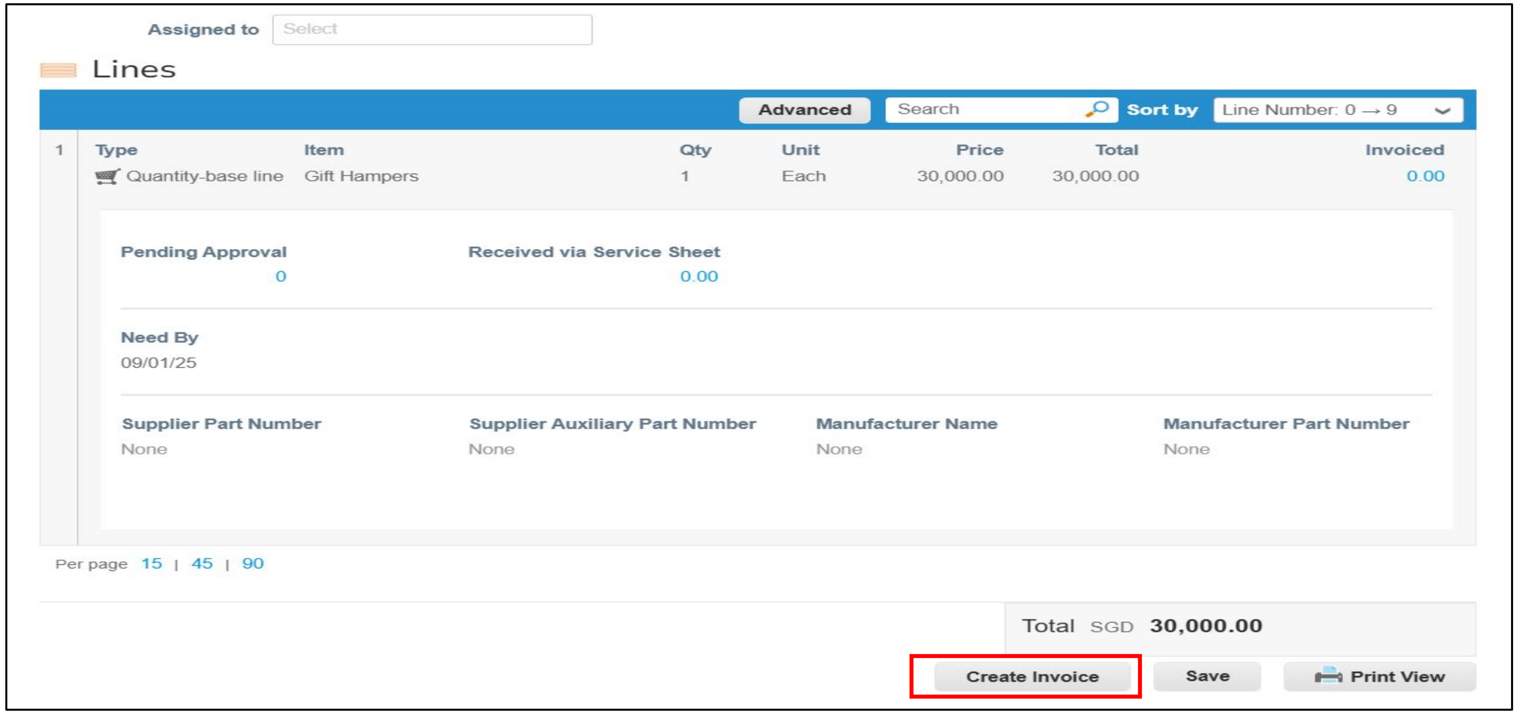
Supplier Steps

- Supplier can create Invoice in 2 ways, by clicking on the “Yellow” Coin icon under the Actions tab.

OR

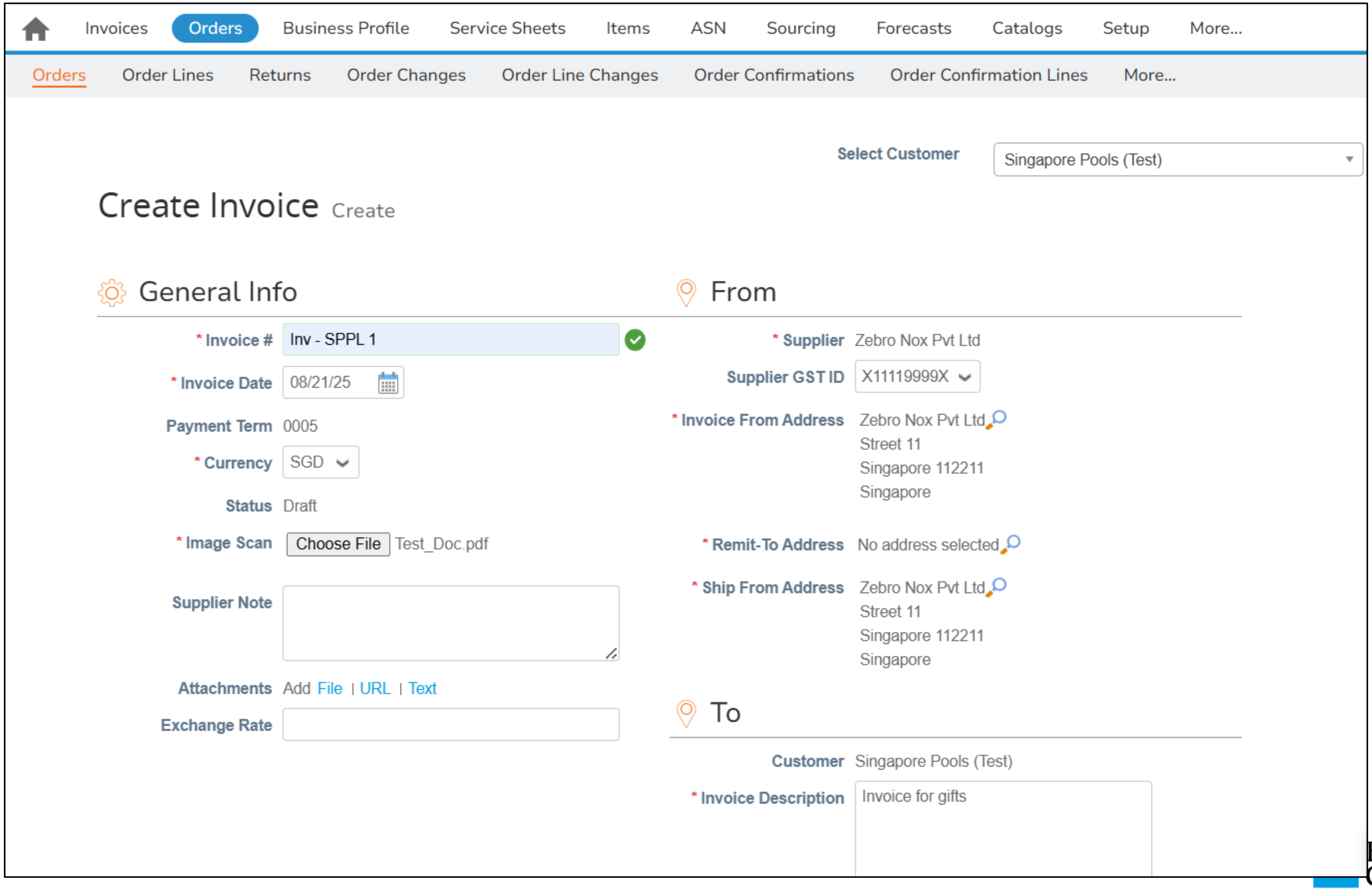
- Supplier will open the PO and scroll to the bottom and click on “Create Invoice” button to create invoice against the Purchase order.





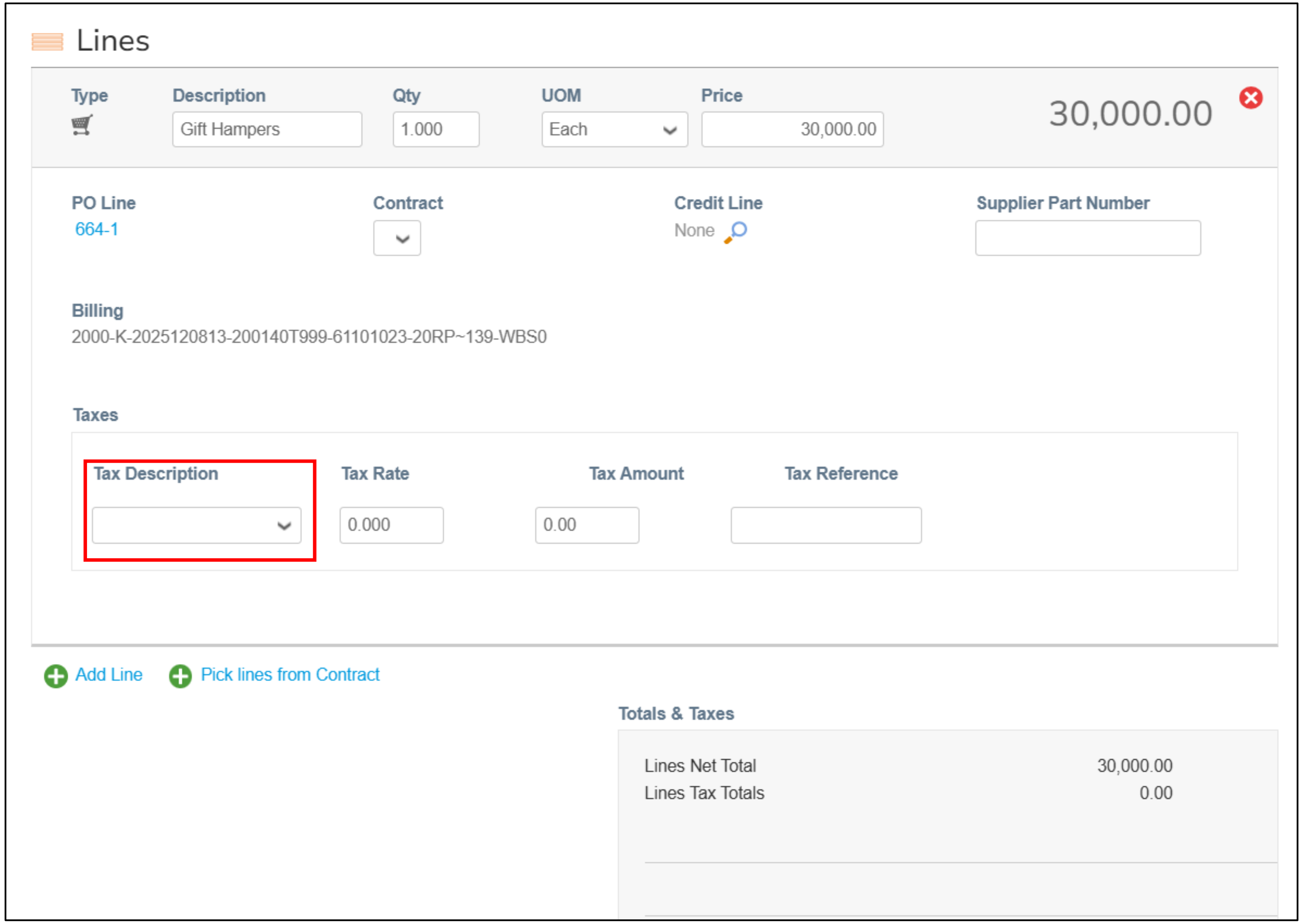
Supplier Steps

- Supplier will land on Create Invoice page, where the supplier will start filling in the mandatory details (*)



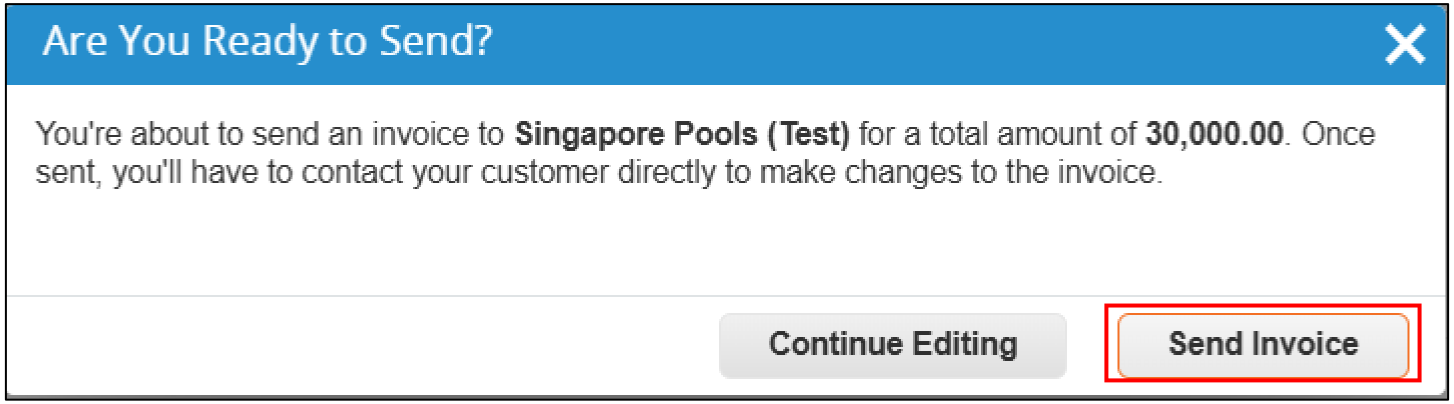
Supplier Steps

- Supplier will enter the line level details as well.
- Supplier can add tax from the “Tax Description” dropdown.



Supplier Steps

- Once all the mandatory details have filled in by the Supplier, supplier will scroll down to the bottom of the page.
- Supplier will be able to see “Submit” button in blue, click on it to send the Invoice to the AP Team.
- Click on “Send Invoice”



Supplier Steps

- Supplier can print the Invoice copy too.

<u>Recommended Setting while printing</u>: More Settings >> Scale=Custom, 70