ACCURATE SUPPLIER INFORMATION

REMOVE MANUAL WORK

ACTIONABLE INSIGHTS

Supplier Information Management (SIM)

SIM is an information management tool in Coupa that streamlines requesting, approving, and maintaining supplier information, such as:

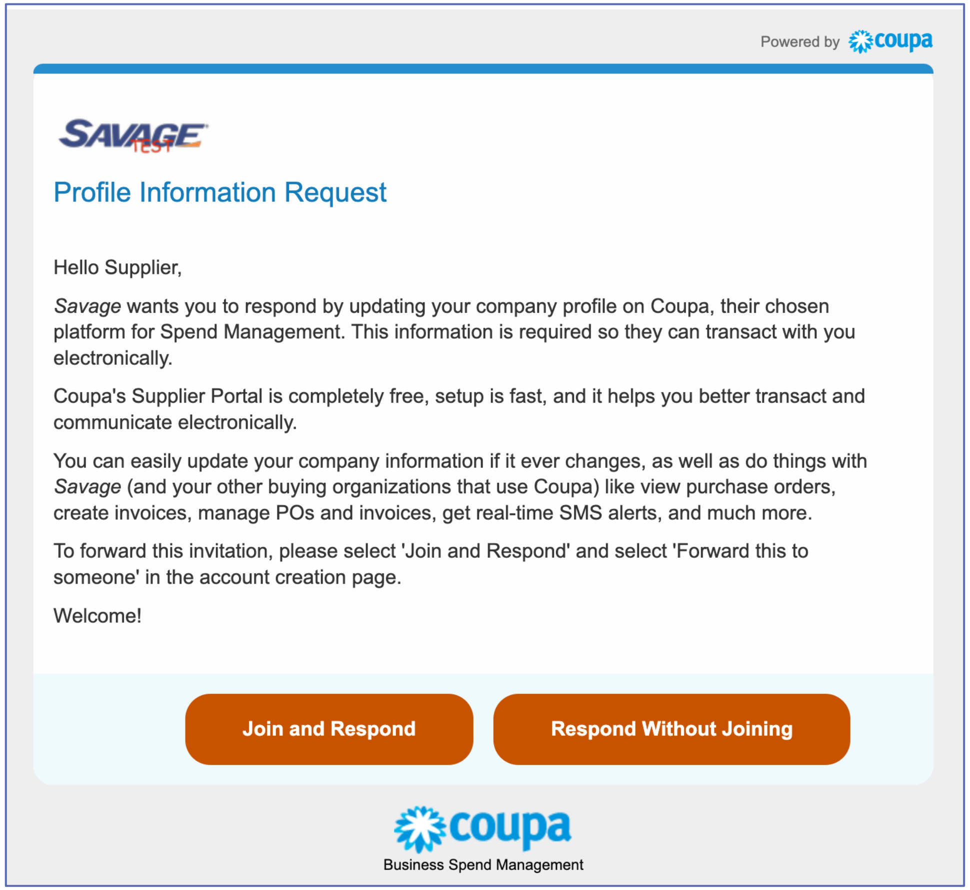
- Contact Information
- Financial Information
- Certifications and tax forms

SIM helps avoid missing, outdated, and inaccurate supplier information so that spend management is not disrupted

EXTERNAL SUPPLIER ONBOARDING

If External Onboarding is selected, an email will be sent to the supplier

- The Supplier will receive an Information Request email that will include a Savage specific introduction to Coupa and a request to:
  - **Join and Respond**
    - Suppliers can register their own profile with the Coupa Supplier Portal (CSP)
    - If a Supplier already has a CSP account, the invitation will reflect this (i.e., Request to connect with Savage)
  - **Respond without Joining**
    - The Supplier can register as a Savage supplier however, will not join the CSP.
    - When the Supplier chooses this option, they will automatically receive Supplier Actionable Notification (SAN).



Powered by coupa

SAVAGE TEST

Profile Information Request

Hello Supplier,

Savage 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 *Savage* (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

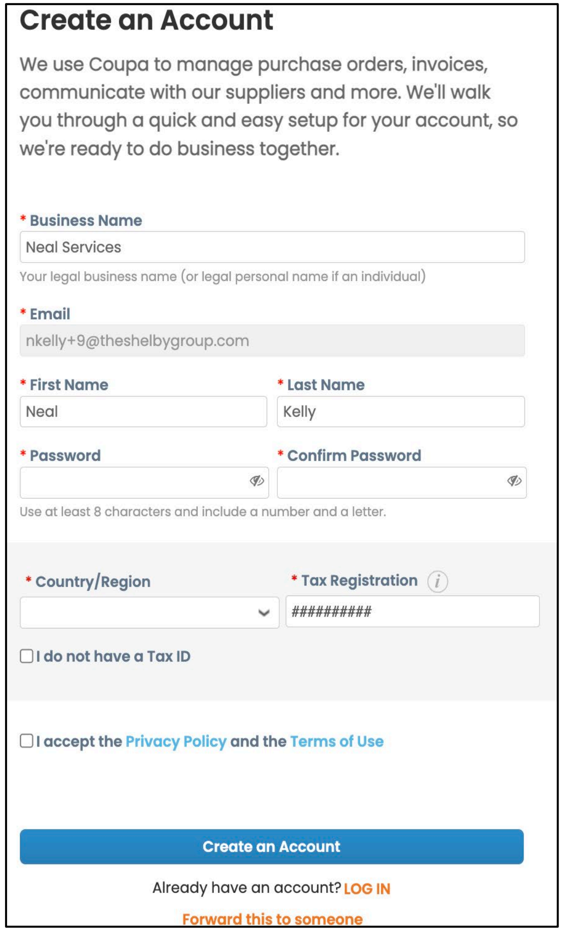
coupa

Business Spend Management

EXTERNAL SUPPLIER ONBOARDING

Join and Respond

- The Supplier will be be prompted to create a free account to use the CSP.
- **Note:** the primary contact may use the ‘Forward this to someone’ option if there is a more suitable contact



Create an Account

We use Coupa to manage purchase orders, invoices, communicate with our suppliers and more. We'll walk you through a quick and easy setup for your account, so we're ready to do business together.

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

* Email
nkelly+9@theshelbygroup.com

* First Name
Neal

* Last Name
Kelly

* 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

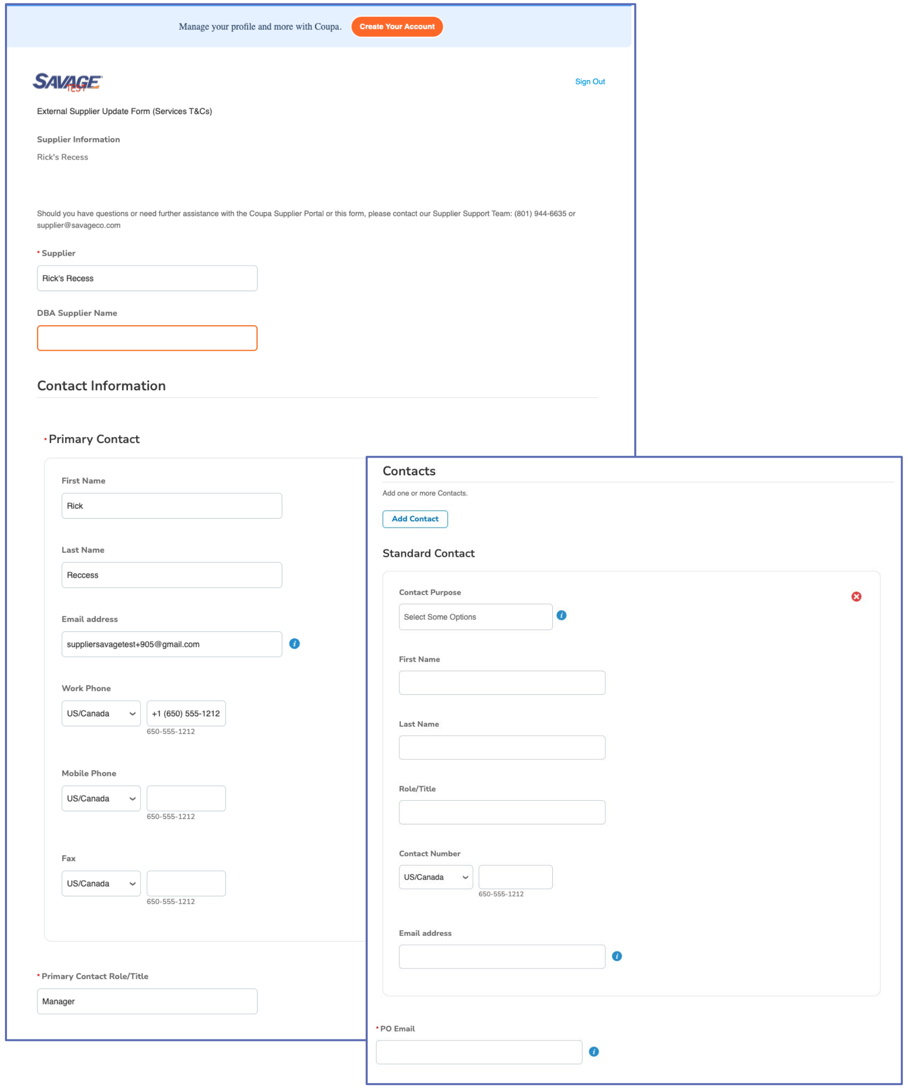
Already have an account? LOG IN

Forward this to someone

EXTERNAL SUPPLIER ONBOARDING

Respond without Joining

- An external supplier update form will open in a new window for the supplier to complete
- To the right is what the external supplier update form looks like.
  - **Note**: Whether or not the supplier joins the CSP, they will still need to fill out the information request.
- The information from the New Supplier Request Form will have defaulted on external supplier update form
- The supplier can update the defaulted information as needed


Manage your profile and more with Coupa. Create Your Account

Sign Out

External Supplier Update Form (Services T&Cs)

Supplier Information

Rick's Recess

Should you have questions or need further assistance with the Coupa Supplier Portal or this form, please contact our Supplier Support Team: (801) 944-6635 or supplier@savageco.com

* Supplier

Rick's Recess

DBA Supplier Name

Contact Information

* Primary Contact

First Name

Rick

Last Name

Reccess

Email address

suppliersavagetest+905@gmail.com

Work Phone

US/Canada +1 (650) 555-1212

650-555-1212

Mobile Phone

US/Canada

650-555-1212

Fax

US/Canada

650-555-1212

* Primary Contact Role/Title

Manager

Contacts

Add one or more Contacts.

Add Contact

Standard Contact

Contact Purpose

Select Some Options

First Name

Last Name

Role/Title

Contact Number

US/Canada

650-555-1212

Email address

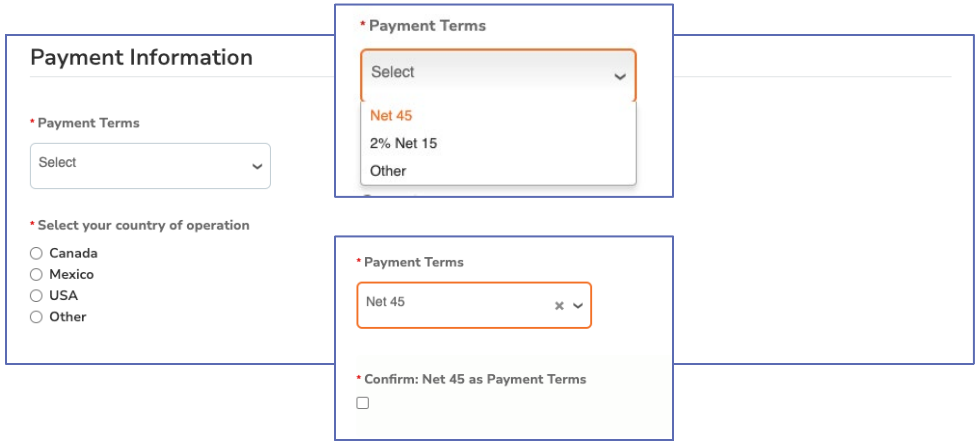
* PO Email

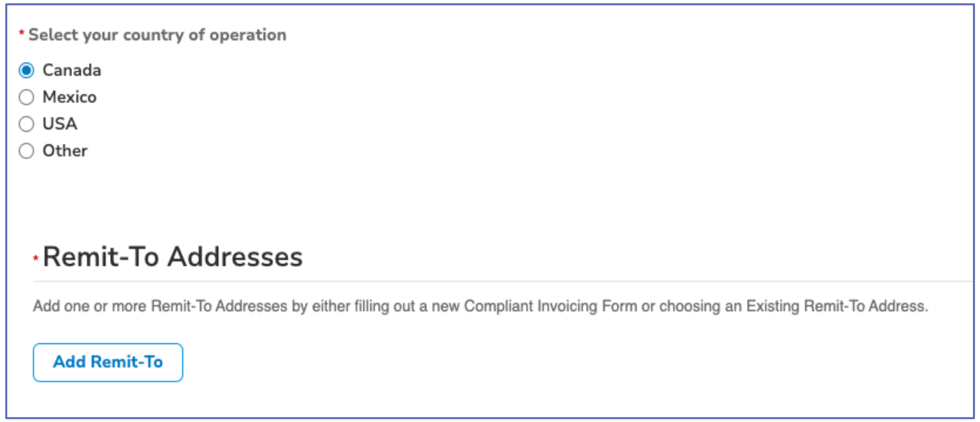
EXTERNAL SUPPLIER ONBOARDING

EXTERNAL UPDATE FORM CON'T

<u>The Suppler will continue to fill out the form as follows:</u>

- Payment Information
  - Payment Terms and confirming payment terms
  - Select **country of operation**
    - This field will drive the appropriate Remit-to sub-form, customized to contain country/region specific fields for:
      - Canada based suppliers
      - Mexico based suppliers
      - US based suppliers
      - Other/International based suppliers
- Remit-To and Payment Method





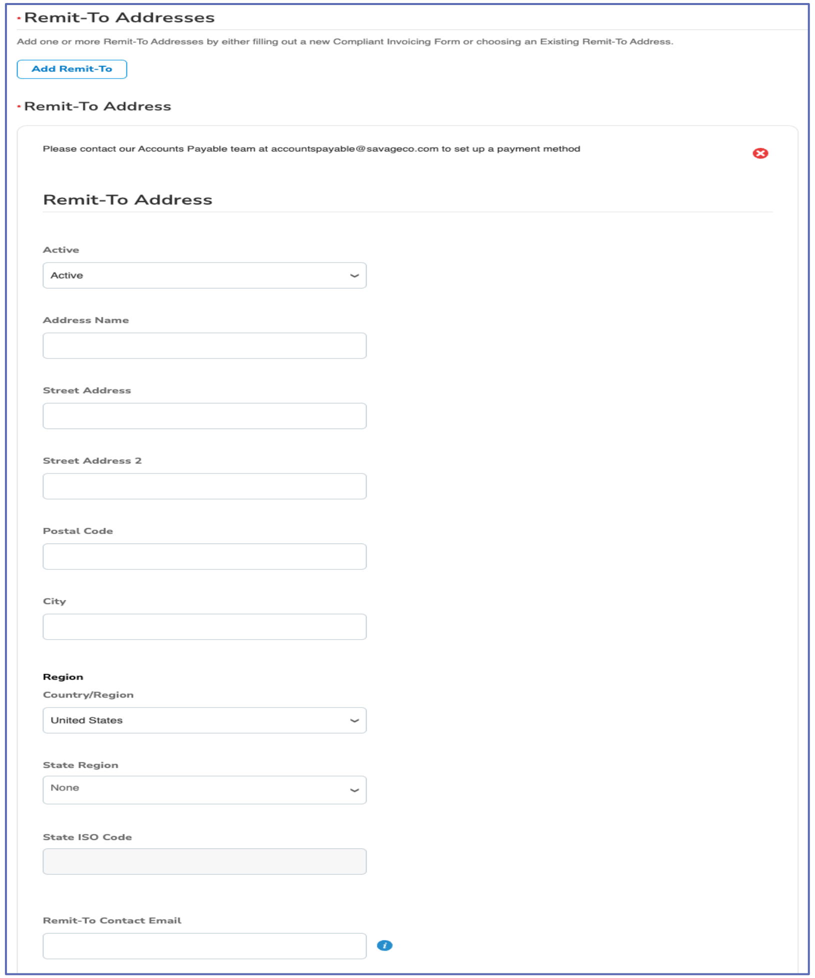
SAVAGE

EXTERNAL SUPPLIER ONBOARDING

EXTERNAL UPDATE FORM CON'T

Remit-To:

- The Remit-To Address section is consistent across all sub-forms
- The supplier will need to enter the following information:
    - **Remit-To status** (Active or Inactive)
    - Enter **Address Name**
    - Enter **Street Address**
    - Enter **Postal Code**
    - Enter **City**
    - Select **Country/Region**
    - Select **State Region**
    - Enter **Remit-To Contact Email**
        - **This email is what Savage uses to send remittance advices to suppliers prior to sending payments.**

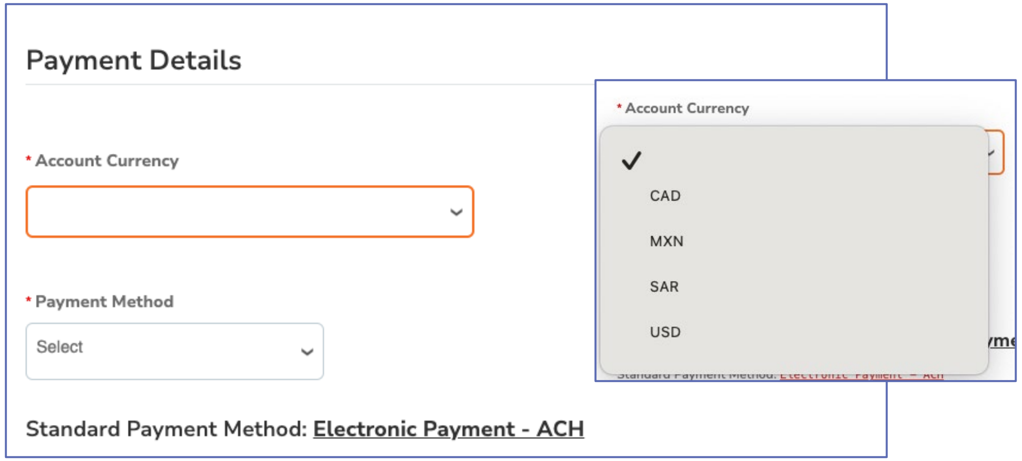

Remit-To Addresses
Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.
Add Remit-To
Remit-To Address
Please contact our Accounts Payable team at accountspayable@savageco.com to set up a payment method
Remit-To Address
Active
Active
Address Name
Street Address
Street Address 2
Postal Code
City
Region
Country/Region
United States
State Region
None
State ISO Code
Remit-To Contact Email

EXTERNAL SUPPLIER ONBOARDING

EXTERNAL UPDATE FORM CON'T

Remit-to Con't:

- The supplier will need to continue entering the following information:
  - Select **Account Currency**
  - Select **Payment Method**
    - Suppliers have two options: ACH or Check

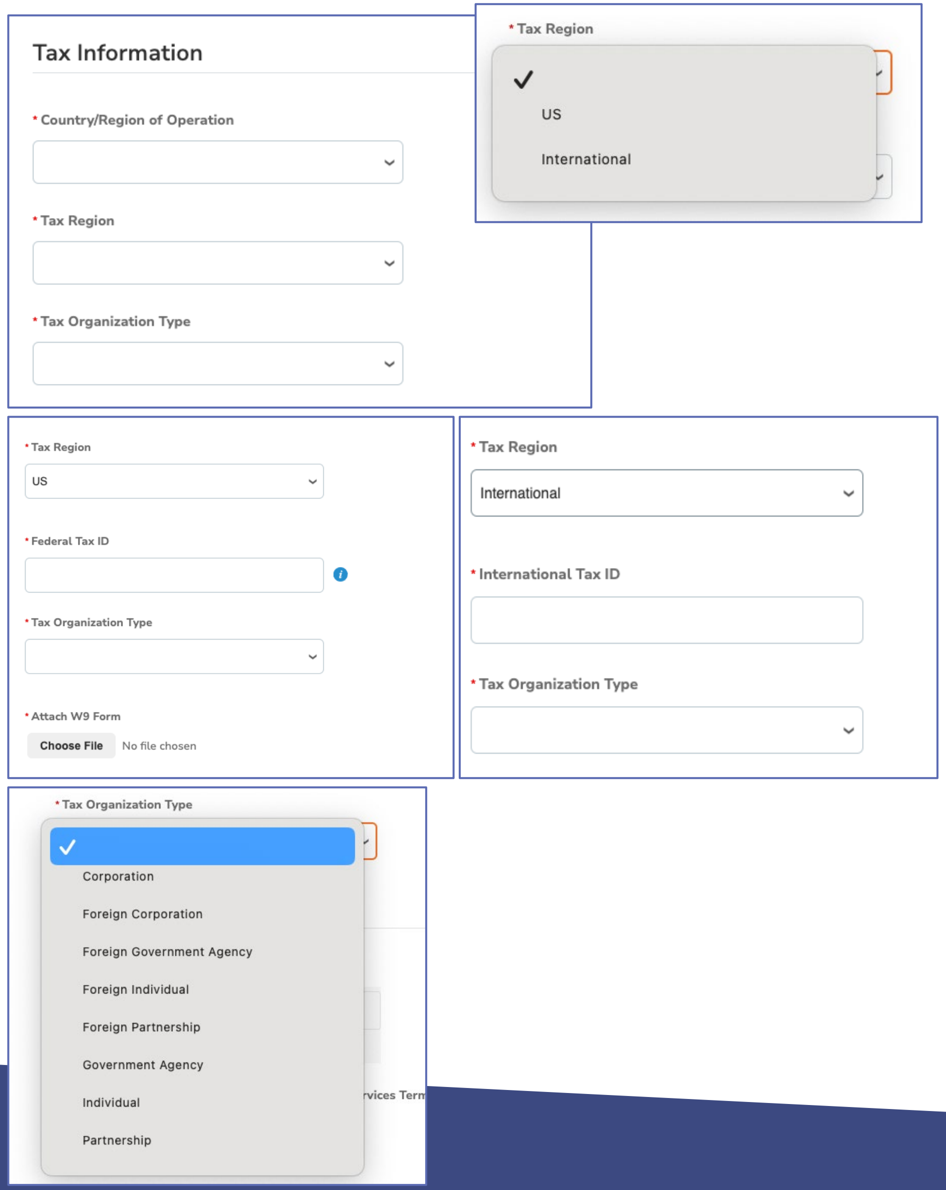


EXTERNAL SUPPLIER ONBOARDING

EXTERNAL UPDATE FORM CON'T

Tax Information

- Select **Country/Region of Operation**
  - Select **Tax Region**
    - **For US based suppliers, they will enter the following:**
      - Enter Federal Tax ID
      - Attach W9 Form
    - **International**
      - Enter International Tax ID
        - **Note**: if the supplier does not have an international tax ID, they will still be able to submit the form.
- Select **Tax Organization Type**



EXTERNAL SUPPLIER ONBOARDING

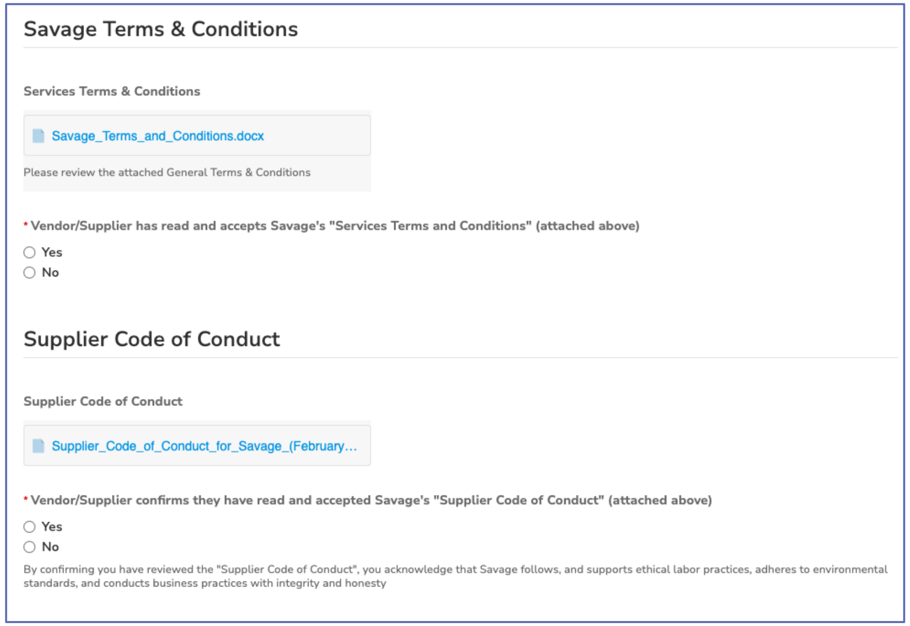
EXTERNAL UPDATE FORM CONT'T

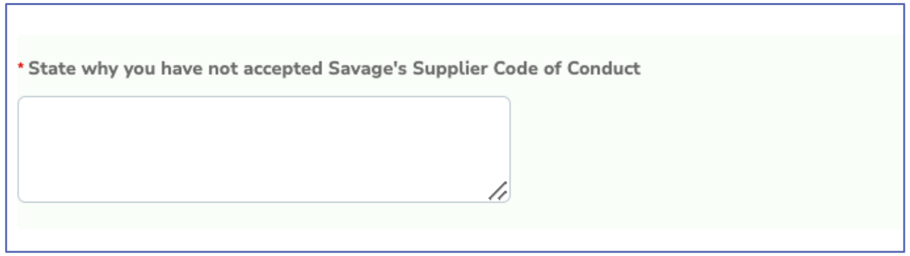
<u>Next, the Supplier will need to acknowledge the following:</u>

- Savage Terms & Conditions
  - Note: When the supplier agrees to our terms and conditions, they are also agreeing to Savage payment terms, which default to NET 45 payment terms.
- Savage Supplier Code of Conduct

Note: If the supplier selected 'No' in agreement for either field, the supplier must provide a reason for not accepting.

  - Additionally, Procurement will review the Supplier's reason(s) as to why they are selecting "No" during the internal approval chain process.

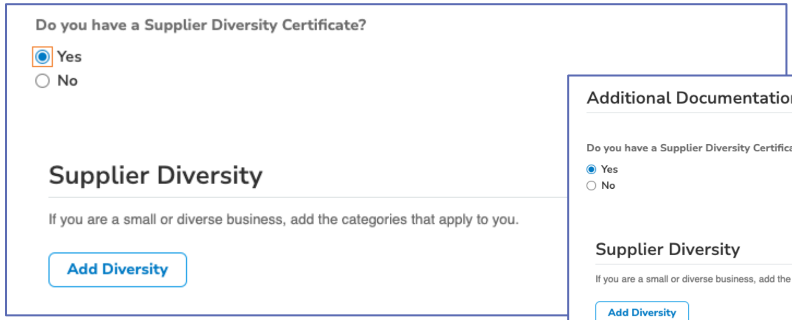


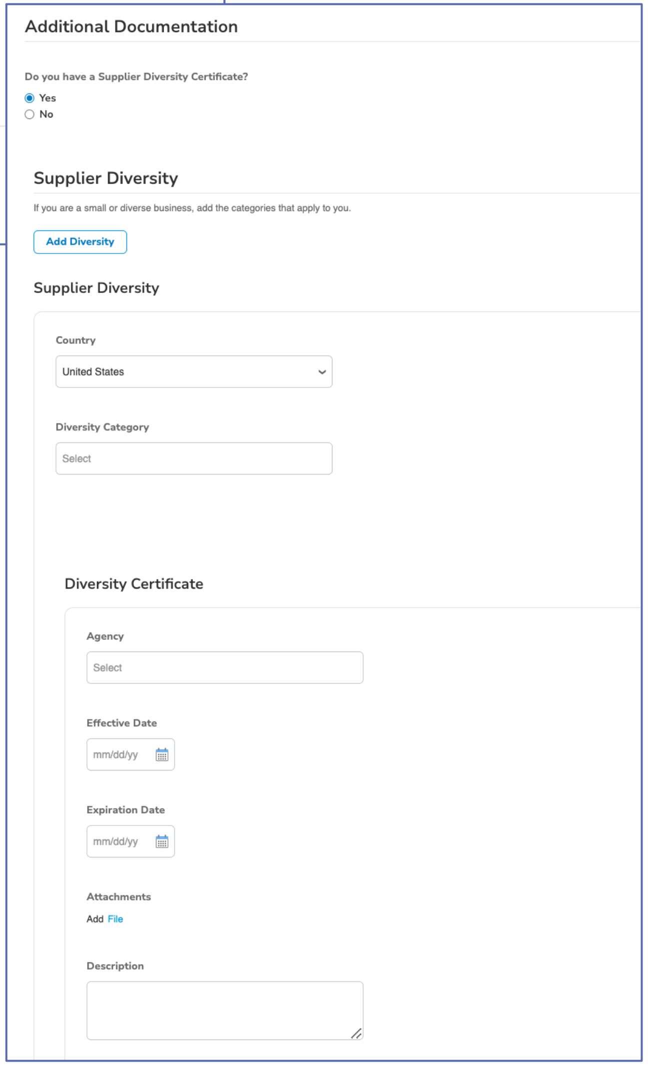


EXTERNAL SUPPLIER ONBOARDING

EXTERNAL UPDATE FORM CON'T

- **<u>The Supplier has the option to provide additional information/documentation. Examples below:</u>**
  - Supplier Diversity
    - The supplier can indicate if they have a Diversity Certificate
    - If Yes, Add Diversity field appears. Click Add Diversity and add the following information:
      - Enter Country
      - Select Diversity Category
      - Select Agency
      - Enter Effective Date
      - Enter Expiration Date
      - Upload Attachments
      - Provide Description
  - The Supplier may also upload any additional documentation they deem necessary



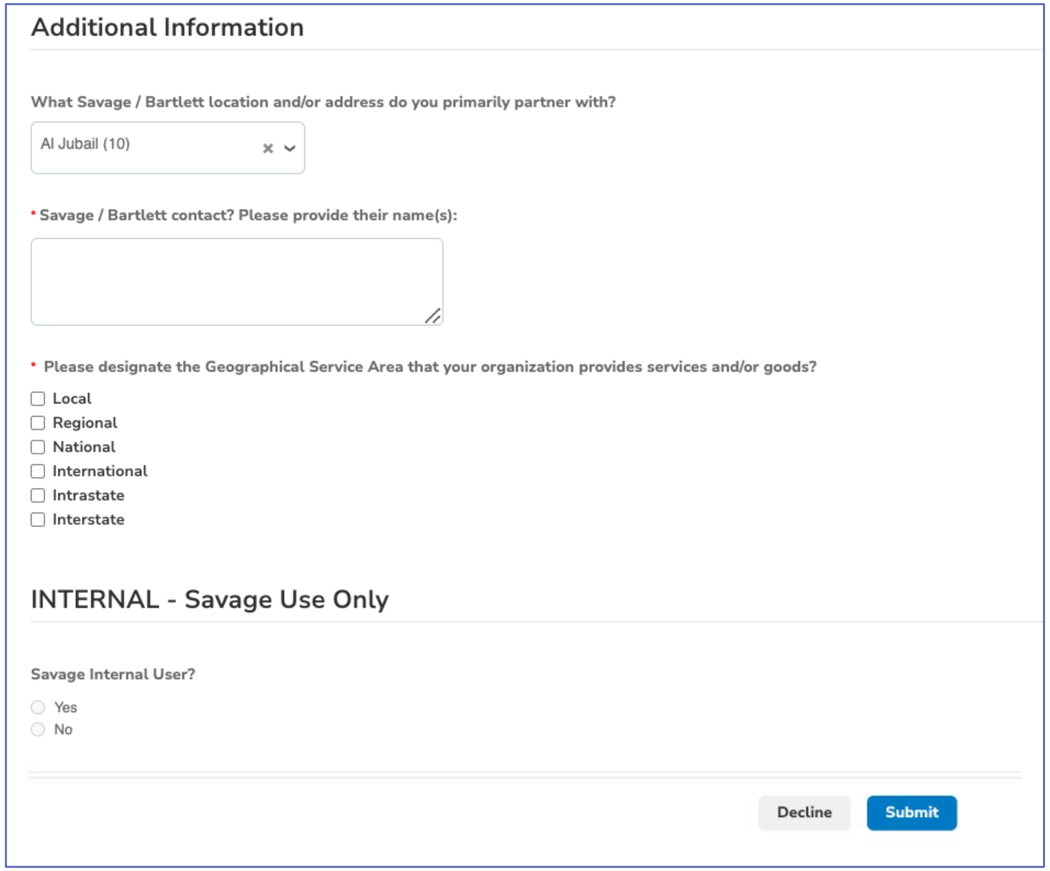


SAVAGE

EXTERNAL SUPPLIER ONBOARDING

EXTERNAL FORM CON'T

- **Additional Information**
  - Select Savage/Bartlett **location** with whom the supplier partners
  - Enter Savage/Bartlett **contact**
  - Select **Geographical Service Area**
  - Supplier then Clicks **Submit**
  - Once the Supplier submits the External Supplier Request Form, it will **route to Savage Approval Groups for approval**.


Additional Information

What Savage / Bartlett location and/or address do you primarily partner with?

Al Jubail (10)

* Savage / Bartlett contact? Please provide their name(s):

* Please designate the Geographical Service Area that your organization provides services and/or goods?

- [ ] Local
- [ ] Regional
- [ ] National
- [ ] International
- [ ] Intrastate
- [ ] Interstate

INTERNAL - Savage Use Only

Savage Internal User?

- ( ) Yes
- ( ) No

Decline Submit

EXTERNAL SUPPLIER ONBOARDING

APPROVAL PROCESS

Once the external supplier onboarding form is submitted by the supplier, it will come back to Savage for approval and be in a **Pending Approval** status

- To ensure Savage has required information like payment and completed tax documents, forms submitted by suppliers will route for approval in Coupa just like new supplier requests.
  - The form will first be reviewed and approved by Procurement Leadership and then the Supplier Success Team.

- All approvers have the ability to Approve or Reject forms:
  - **Form rejections require a comment prior to submission**
  - **Once Rejected,** the external supplier update form will be sent back to the supplier with the comment
  - The supplier can then make appropriate updates and resubmit the form to Savage