

How to Onboard as a Supplier in Coupa (for Suppliers)



*For the best learning experience, please click the **Editing** button and select **Open in Desktop** to view this document in your desktop application of Microsoft Word. Viewing this document in SharePoint or in-browser may distort the placement of images and text.*

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Your screen in the Coupa Supply Portal (CSP) may differ slightly from this training, but the steps to complete the activity will be the same.

Purpose

This Quick Reference Card (QRC) explains the processes for suppliers to onboard to Kimberly-Clark Coupa.



Note: Some Kimberly-Clark suppliers are already set up in the Coupa Supplier Portal to transact with their other customers. These suppliers should complete the **Setting Up as an Existing Supplier Profile** portion of the set-up process.

For those suppliers who do not currently transact with their customers via the Coupa Supplier Portal, they should follow the **Setting Up a New Supplier Profile** (e.g., Task 1) set-up process first, then continue to Task 2 to complete their setup via Kimberly-Clark Information forms.

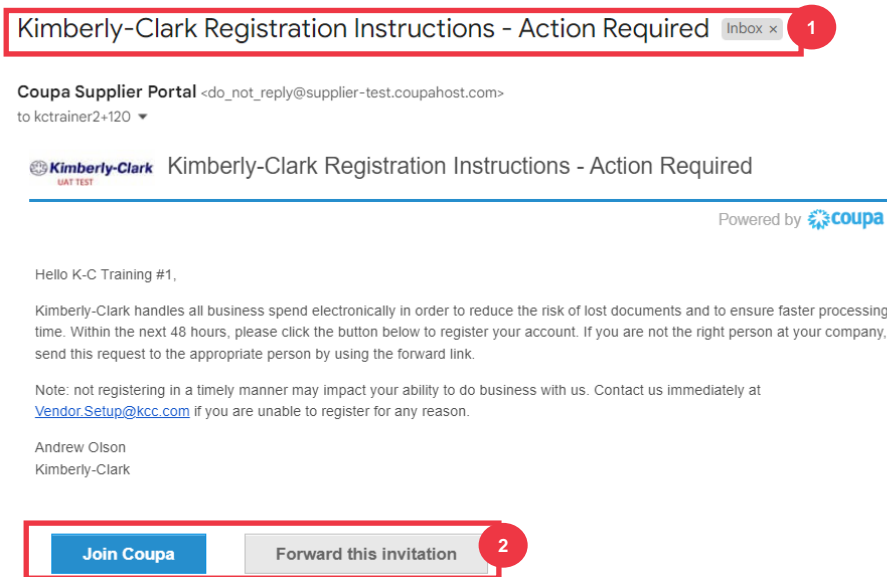
Key Terms

- **New Supplier Request Form** is a form that initiates the supplier onboarding process and is submitted by a Requester. The submission of the New Supplier Request Form will initiate the Supplier External Update Form.
- **Supplier External Update Form** is a form submitted by the supplier to either update their existing information in the Coupa Supplier Portal or to provide their information for the first time as part of the supplier onboarding process.
 - a. In addition to this form, some suppliers may be required to complete a Financial and Legal Assessment questionnaire. This questionnaire may be a part of the onboarding process for some suppliers and must be completed, and any applicable issues addressed, in order for the Supplier External Update Form to be approved.
 - b. Once this form has been approved, the supplier record information will integrate to other systems for set up. After that set up is complete, transactions can be conducted between Kimberly-Clark and the supplier.
- **Coupa Supplier Portal (CSP)** is a web portal to assist suppliers in managing their transactions with Kimberly-Clark.
- **External Financial and Legal Assessment** is an external questionnaire that is part of the onboarding process designed to determine a suppliers' financial and legal health. This questionnaire is triggered for select suppliers that meet criteria.

Setting Up a New Supplier Profile to Kimberly-Clark on Coupa

Registering with Coupa Supplier Portal (CSP) will connect you to transacting with Kimberly-Clark. The steps below outline the preferred and only process K-C accepts to onboard suppliers through CSP.

1. You will receive an email invitation from K-C with the subject line: **Kimberly-Clark Registration Instructions – Action Required**
2. Click the **Join Coupa** button from the invitation email or Forward this invitation if you are not the right contact within your company



**Please note that the message you receive may be slightly different from the above screenshot*

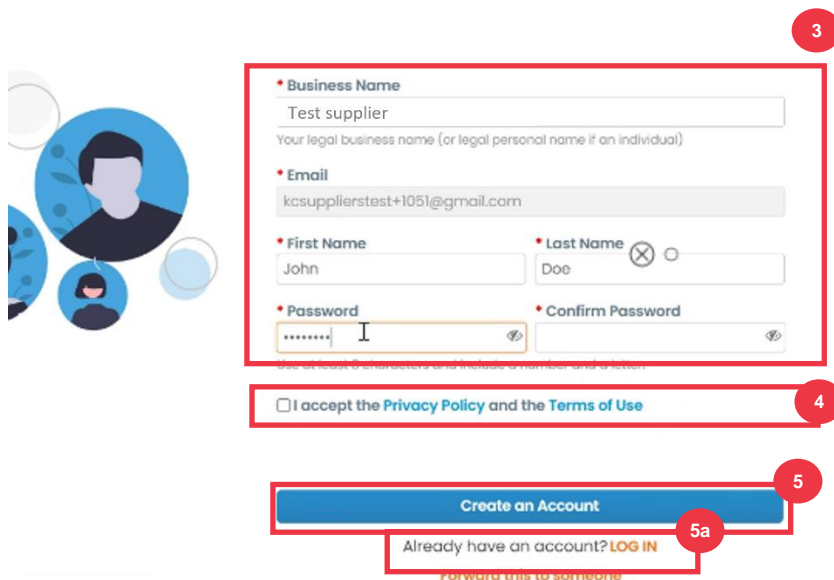
Please continue to the next page.

3. Enter the following information for the following fields (required fields are indicated by a red asterisk *). Provide your, **Business Name**, **Email address**, **First Name** (primary contact), **Last Name** (primary contact), and **Password** (alphanumeric, minimum 8 characters)
4. Select the **Privacy Policy and the Terms of Use** checkbox (this is a requirement).



Note: The legal terms of use list the terms and conditions for using e-invoicing through Coupa and the CSP. You as a supplier, especially if you are responsible for managing legal tax invoices, are required to have read, assessed and agreed to these terms of use and to be aware of your responsibilities towards the content and handling of these invoices.

5. Click the **Create an Account** button when complete.
 - a. Click the **LOG IN** link (if you have an existing CSP account).



The screenshot shows a registration form with the following fields and elements:

- Business Name:** Text input field containing "Test supplier". A red box highlights this field with a red circle containing the number "3".
- Email:** Text input field containing "kcsupplierstest+1051@gmail.com".
- First Name:** Text input field containing "John".
- Last Name:** Text input field containing "Doe". A red box highlights this field with a red circle containing the number "3".
- Password:** Password input field with masked characters. A red box highlights this field with a red circle containing the number "3".
- Confirm Password:** Password input field with masked characters. A red box highlights this field with a red circle containing the number "3".
- Privacy Policy and Terms of Use:** A checkbox labeled "I accept the Privacy Policy and the Terms of Use". A red box highlights this checkbox with a red circle containing the number "4".
- Create an Account:** A blue button. A red box highlights this button with a red circle containing the number "5".
- LOG IN:** A link labeled "Already have an account? LOG IN". A red box highlights this link with a red circle containing the number "5a".



Note: Your CSP account is based on a specific email address. If you use an email address different from the one that K-C has on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

Please continue to the next page.



Note: If you need translation assistance, Google Chrome and Microsoft Edge offer free translation browser extensions, however, it is your responsibility to ensure the information provided back to Kimberly-Clark is accurate

6. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **First and Last Name, Phone Number, Country/Region, Address, City, State, Postal code.**
7. Click **Next** button.

The screenshot shows a form titled "Your Contact Information" with a close button (X) in the top right corner. The form contains several input fields, each with a red asterisk indicating it is required. A red box highlights the entire form area, with a red circle containing the number "6" next to it. Below the form, a blue button labeled "Next" is highlighted with a red box and a red circle containing the number "7". Below the "Next" button is a link that says "Skip for Now".

Your Contact Information

* First Name: SupplierName

* Last Name: Trainer

* Phone Number: [Empty]

* Country/Region: United States (dropdown menu)

* Address: 123 Main Street

* City: Houston

State: Texas

* Postcode: 77092

Next

[Skip for Now](#)

Please continue to the next page.

8. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **Business Website, Tax ID**. Select **I do not have a website**, or **I do not have a Tax ID** if this is not applicable for your company.
9. Enter the following information about your business (required fields are indicated by a red asterisk *): **DUNS Number**, if your company have Dun & Bradstreet DUNS Number.
10. Click **Next** Button.

Tell Us About Your Business

*** Business Website**

I do not have a website

*** Tax ID (or Local ID)**

Tax ID is to confirm you are a real business. Individuals may use your Social Security number.

I do not have a Tax ID

DUNS Number

Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.

Next

[Skip for Now](#)

11. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **Year Established, Preferred Currency, Company Size, Business Description, Area of Service, Exclusion Areas**.
12. Click **Next** button.

Customise Your Profile

Year Established	Preferred Currency	Company Size
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

Business Description

Share a few words about your company.

Area of Service

Global Regional

Exclusion Areas

If you serve an entire region but there are a few exceptions, you can exclude them here (up to 5).

Next

[Skip for Now](#)

- 13. Choose your country.
- 14. Choose Diversity Categories applicable for your company.
- 15. Click **Next** button.

Highlight Your Diversity Credentials

Diversity is a business advantage.

- 16. Click **Upload** button to upload diversity certificates.
- 17. Click **Skip for Now** to bypass this step and upload your Diversity Certificates on a later stage.
- 18. Click **Next** button.

Upload Diversity Certificates

(Certificates may be added later)

- 19. Choose industry applicable for your company.
- 20. Choose categories of service that your company provides.
- 21. Click **Next** button.

Identify Your Product Categories

Buyers search Coupa to find new suppliers like you.

Industry

19

Product and Service Categories

Select the top 10 UNSPSC categories you serve.

20

21

[Skip for Now](#)

- 22. Choose **Continue with Free** button.

< Back ×

Get Verified to Grow Your Business

Verified profiles appear at the top of search results.

	Coupa Verified	Free
Searchable company profile	✓	✓
Catalogue management	✓	✓
Orders management	✓	✓
Invoices management	✓	✓
Payments management	✓	✓
Payment readiness via bank account verification	✓	✗
Prominent Verified badge on your company profile ⓘ	✓	✗
Top of search on buyers' search results ⓘ	✓	✗

46 USD per month

free forever

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After a successful registration, you will be directed to the **Coupa Supplier Portal (CSP) homepage**.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the user name 'JOHN', a notification bell with '53' alerts, and a 'HELP' link. A blue navigation bar contains the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below this, a secondary bar includes 'Add-ons' and 'Setup'. A red banner at the top of the main content area states: 'Action needed: Complete your profile to get paid faster and get discovered. [Learn More](#)'. Below the banner, a 'Profile Progress' section shows a 12% complete progress bar and a 'Last Updated' timestamp of 'about 4 hours ago', with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '3 Legal Entities' (with a 'View' link), '1 Registered User' (with a 'View' link), and '1 Connected Customer'. On the right side, there are sections for 'Announcements' (with a 'View All (0)' link), 'One-Click Savings' (with a 'View All' link), and 'Merge Accounts'. The 'Merge Accounts' section includes a 'Start saving today!' callout, a description of exclusive deals, and a 'Request Merge' button.

Updating an Existing Supplier Profile via Kimberly-Clark Information Forms

Suppliers who already transact with other customers via Coupa Supplier Portal will need to setup their existing CSP profile with Kimberly-Clark via the Supplier External Update form.

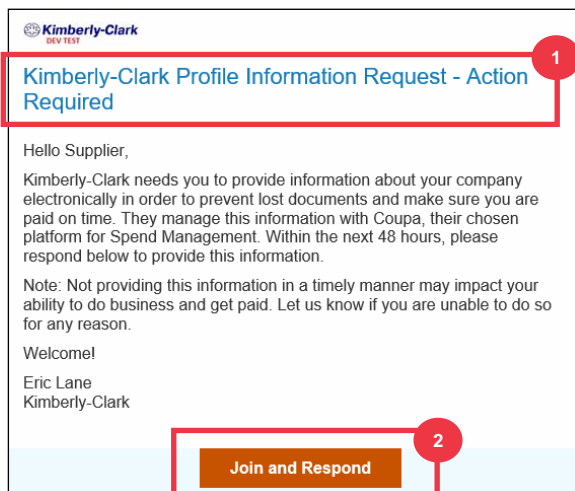
Please perform the following steps to setup transacting with Kimberly-Clark.



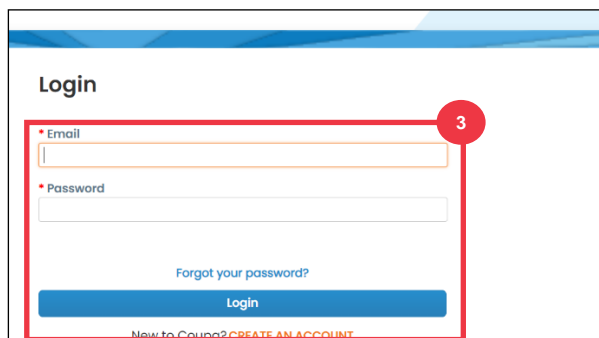
Note: It is important that suppliers complete the form to be setup and transact with Kimberly-Clark.

Coupa is the system for Kimberly-Clark to manage supplier information for all suppliers, even in the case for suppliers receiving purchase orders from a different system (e.g., Taulia).

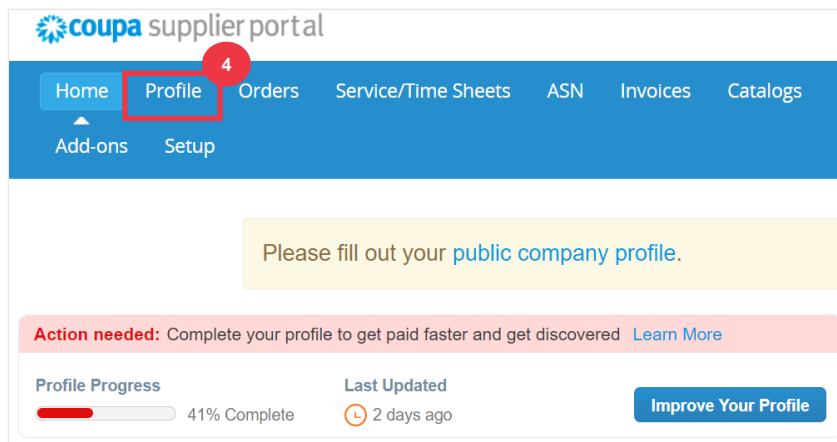
- Suppliers will be sent an email invitation from the **Coupa Supplier Portal (do_not_reply@supplier.coupahost.com)** with the subject line, **Kimberly-Clark Profile Information Request – Action Required**.
- Click the **Join and Respond** button from the invitation email.



- The **Coupa Supplier Portal login** screen appears, enter the login credentials for CSP.



- From the **Coupa Supplier Portal** home screen, click the **Profile** tab.

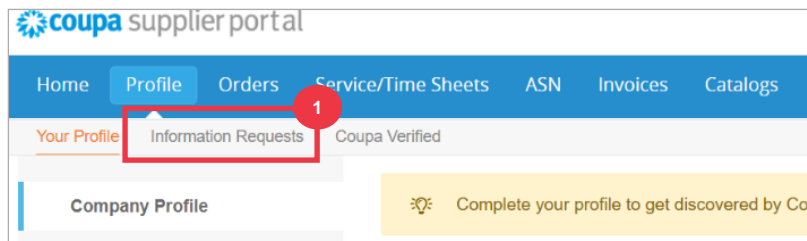


Completing (or Delegating) a Supplier External Update Form

When the Supplier receives the **External Form** to be completed for the first time, it will be sent to the supplier primary contact. To allow another user to complete the External Form, you will need to add a new user to your company's CSP profile. Please see [How to Add a New User in CSP](#) for Suppliers training for more details.

Once added, a new contact will be able to access the External Form from the CSP homepage under **Information Requests**. To complete the request for the External Form continue to perform the following steps in the CSP.

- Click the **Information Requests** subtab.



- The **Supplier External Update** form will load.
- Some fields will **auto-fill** from prior information from your company's public profile.
- Please update any information that may have changed in the required fields (*).
 - Review the following sections to ensure the accuracy of auto-filled information or fields that require information to be entered: **Supplier Legal Name, Primary Contact, Legal Address, Tax Registrations, Remit-To /Bank Details, Documentation, and Additional Supplier Contacts.**

4. Ensure Primary Supplier Contact information is correct.

* Primary Supplier Contact who will act as Supplier's Coupa Administrator

First Name

Last Name

Email address i

Work Phone US/Canada
650-555-1212

Mobile Phone US/Canada
650-555-1212

Fax US/Canada
650-555-1212

5. **Banned Country Validation** – Check the box if you can ensure your company is not providing goods or services from any of these banned sourcing countries.

Banned Country Validation

In accordance with Kimberly-Clark policy, please verify that you have identified all manufacturing locations, including suppliers of this supplier, that will supply Kimberly-Clark are not located in any of the below banned sourcing countries: Afghanistan, Burundi, Central African Republic, Chad, Congo, Dem. Rep., Congo, Rep., Cuba, Equatorial Guinea, Eritrea, Guinea-Bissau, Iran, Iraq, Korea Dem. Rep., Libya, Pakistan, Somalia, South Sudan, Sudan, Syrian Arab Republic, Tajikistan, Turkmenistan, Venezuela RB, Western Sahara, Yemen Rep., Zimbabwe.

* By checking this box, I acknowledge that the requested supplier DOES NOT operate or manufacture in any of the above countries or regions

6. Click the **Add Tax Registration** button to enter **Tax Registration** information (as applicable).

Tax Registrations

Use this section to add all your applicable tax registrations.

Add Tax Registration

Tax Registration

Country United States

- 7. Select the radio button option **Yes** or **No** for the **Do you need to add a Remit To/Bank Details?** Select region associated with bank detail.

Do you need to add a Remit To Bank Details? Yes No

* Select Region associated with Supplier RTA/Banking Details North America

- 8. Click the **Add Remit To** button to add or update banking information.

Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant

Add Remit-To

Documentation

The **Choose Remit-To Address** screen appears.

- 9. Click the **Choose** button to add existing banking information.
- 10. Click the **Create New Remit-To Address** button to add new banking information.



Note: Kimberly-Clark requires suppliers to choose a Remit-To Address that includes payment information.

Choose Remit-To Address

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

5678 State St Tampa , FL 33607 United States United States (987654321)	Bank Account (Bank of Tampa)	Choose
5678 State St Tampa, FL 33608 United States	Bank Account (Bank of Tampa)	Choose

Create New Remit-To Address

11. In the **Documentation** section, upload any relevant banking and tax documents using the **Attachments Add File** link. (Each file must be less than 20 MB)

Documentation might include:

- **Banking attachments** (e.g., bank forms, voided checks, etc.)
- **Tax information attachments** (e.g., Permanent Account Number (PAN) Certificates, tax registration, W8/W9 tax forms, etc.)
- **Other supporting attachment information** (e.g., Ministry of Micro, Small & Medium Enterprises (MSME) certification, Certificate of Conformance (COC), or vendor application form).

12. In the **Additional Supplier Contacts** section, provide a **Product Safety and Mfg. Quality** point of contact.

13. Verify the **PO Email address** entered is correct.

Some countries require suppliers and or customers to provide specific certifications.

14. Attach any required certifications (e.g., CIN, GST, MENA, MSMED, SEAL, etc.)
Select the type of certificate, effective and expiration dates.

Certificate

Type

Effective Date

Expiration Date

Attachments [Add](#) [File](#)

Description

The Coupa Supplier Portal allows suppliers to share their Environmental, Social, Governance and Diversity details with their customers.

15. Answer question; **Are you a diverse supplier?** If yes, add **Diversity Certificate Number** and proceed to step 16.

If you are a small or diverse business, click "Add Diversity" Button to add any designations that apply to you. If Diversity Certificate Number applies to you, please populate in field below.

* Are you a diverse supplier?

Diversity Certificate Number

After clicking the Add Diversity button select from the diversity categories.

16. Click the **Add Diversity** button (optional).
 - a. Select from the **Diversity Category** field (optional).

Supplier Diversity

If you are a small or diverse business, add the categories that apply to you.

Add Diversity

Certificates - Supplier Diversity

Country

Diversity Category

17. Click the **Save** button to save the information entered.
18. Click the **Submit for Approval** button to submit the form to Kimberly-Clark for approval.

Internal K-C Use Only

The below fields are for use by K-C members only.

PO Method

To be reviewed by K-C Supplier Onboarding Team

PO Change Method

To be reviewed by K-C Supplier Onboarding Team

Decline
Save
Submit for Approval



Note: Once you have submitted, you will receive an email notification verifying if you have been approved or rejected (with comment).

Contact Kimberly-Clark to resolve any errors or provide required documentation and resubmit.

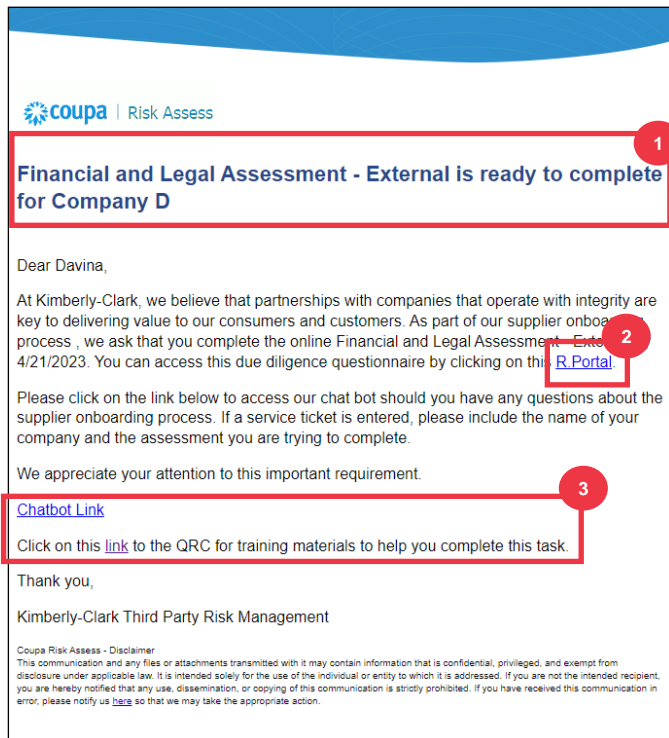
Completing a Financial and Legal Assessment

In some cases, Kimberly-Clark may ask suppliers to complete various questionnaires – called **due diligence questionnaires (DDQs)**. Answering questionnaires is part of Kimberly-Clark’s risk management and onboarding processes. A typical questionnaire that most suppliers will answer is the **Financial and Legal Assessment**. This questionnaire (or DDQ) is used to determine financial and legal risk and must be completed as part of the onboarding process.

Additionally, there are various **risk programs** (actions and clarifications) that may be triggered in response to the various DDQs.

If a supplier meets the criteria to complete a **Financial and Legal Assessment**, the primary contact will be emailed a request to complete the assessment.

1. Suppliers will be sent an email invitation from Kimberly-Clark with the subject line, **Financial and Legal Assessment for <<insert company name>> is ready to complete** from Kimberly-Clark.
2. Click the **Link** in the invitation email to access the assessment.
3. Should you need additional support as you complete the DDQ, you can access the following:
 - a. The Kimberly-Clark **ChatBot**
 - b. Additional **training materials** (quick reference guides and videos)



Please continue to next page.

- Click the **Instructions** button to expand the instructions for form completion.



Note: Please answer all questions. Failure to complete required fields may have an impact on being able to service Kimberly-Clark.

If a Financial and Legal Assessment needs to be reassigned for completion to another individual in the organization, see the [Delegating a Financial and Legal Assessment section](#) of this document.

- In the **Financial Risk** section, provide the information to complete all applicable field. Please remember to complete all required (*) fields.

The screenshot shows the 'Kimberly-Clark' assessment interface. The 'Instructions' section (item 1.00) contains the text: 'Please answer all questions. Failure to complete as requested may have an impact on your company being able to service Kimberly-Clark.' The 'Financial Risk' section (item 2.00) contains a dropdown menu labeled 'Please select: *' with 'United States Dollar - USD' selected. Item 2.10 is labeled 'Please complete the following.' Red boxes and numbers 4 and 5 highlight the 'Instructions' header and the 'Financial Risk' section respectively.

- In the **Legal** section, use the drop-down list options to answer the questions and complete all applicable fields. Please remember to complete all required (*) fields.
 - Note, selecting **Yes** to some questions will prompt additional required fields to provide a more detailed explanation for the answer choice.

The screenshot shows the 'Legal' section of the assessment. Item 3.00 asks: 'During the past 5 years, has the company, or any of its subsidiaries or affiliates, filed for bankruptcy, or taken any other steps (whether in or outside of a legal proceeding) to protect itself against possible insolvency?'. A dropdown menu next to the question is set to 'Yes'. Item 3.01 asks: 'Please provide a detailed explanation.' Below this is a text input field labeled 'Bankruptcy / Insolvency Details *' with the placeholder text 'Enter detailed explanation.' Red boxes and numbers 6 and 6a highlight the 'Yes' dropdown option and the 'Bankruptcy / Insolvency Details' text input field respectively.

- Click the **Submit** button when complete. The form will await K-C approval.

The screenshot shows the bottom of the assessment form. It includes two dropdown menus with 'No' selected, each with a comment icon. To the right is a vertical menu with buttons: 'Top', 'Delegate', 'Recalc', 'Save', 'Cancel', and 'Submit'. The 'Submit' button is highlighted with a red box.

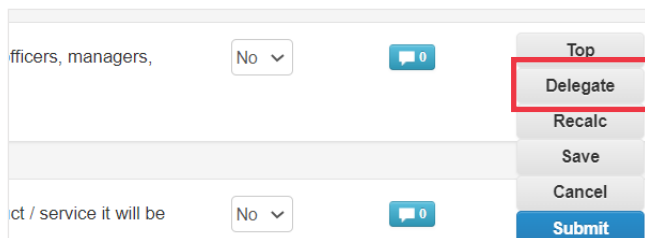
Delegating a Financial and Legal Assessment

If a Financial and Legal Assessment needs to be reassigned for completion by another individual in the organization, follow these steps.



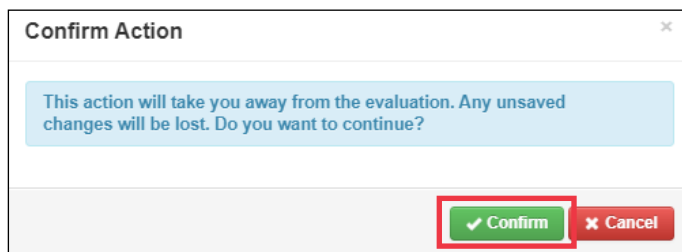
Note: If you are repeatedly delegating tasks to another user at your organization, you may want to invite them to join CSP under your organization, instead. For information on how to add users to your organization's CSP profile, please see the **"How to Invite Users to CSP"** section within the **How to Navigate and Use Coupa Supplier Portal** training guide.

1. At the top or bottom of the assessment, select **Delegate** to assign the completion to someone else.



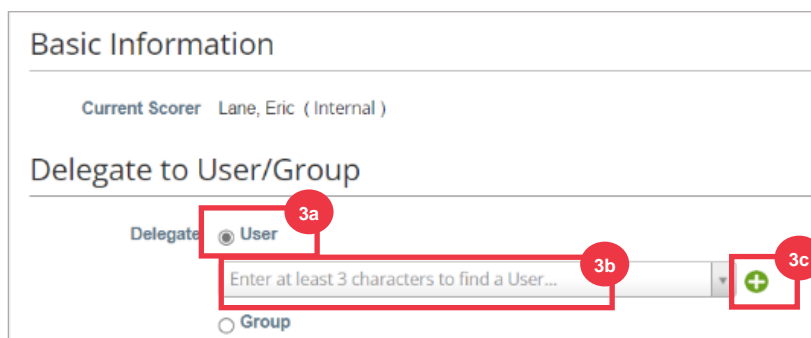
The screenshot shows a portion of the assessment interface. On the right side, there is a vertical menu of buttons: 'Top', 'Delegate', 'Recalc', 'Save', 'Cancel', and 'Submit'. The 'Delegate' button is highlighted with a red rectangular box.

2. Click **Confirm** within the pop-up.



The screenshot shows a 'Confirm Action' dialog box. It contains a blue message box that reads: 'This action will take you away from the evaluation. Any unsaved changes will be lost. Do you want to continue?'. At the bottom right, there are two buttons: a green 'Confirm' button with a checkmark icon and a red 'Cancel' button with an 'x' icon. The 'Confirm' button is highlighted with a red rectangular box.

3. Add a delegate.
 - a. Select **Delegate User** within the **Delegate to User/Group** section.
 - b. If you are adding a current contact, search for and select a user within the search bar.
 - c. If you are adding a user who is not a current contact, select the **+ button** and continue to **Steps 5-6**.

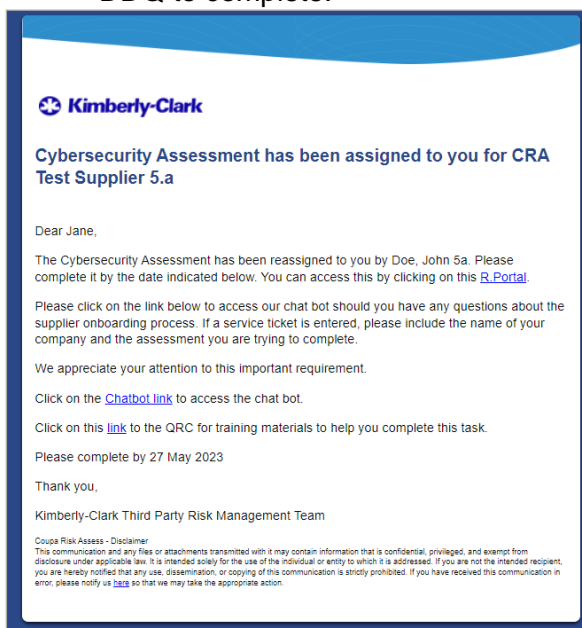


The screenshot shows the 'Delegate to User/Group' section of the interface. It has two radio buttons: 'User' (selected) and 'Group'. Below the 'User' radio button is a search bar with the placeholder text 'Enter at least 3 characters to find a User...'. To the right of the search bar is a green '+' button. Three red callout boxes are present: '3a' points to the 'User' radio button, '3b' points to the search bar, and '3c' points to the '+' button.

- 4. Enter the delegate's details within the required fields.
- 5. Click **Create User**.

- 6. Enter an **Explanation** for submitting the delegation in the comments field (*required).
- 7. Click the **Delegate** button when complete.

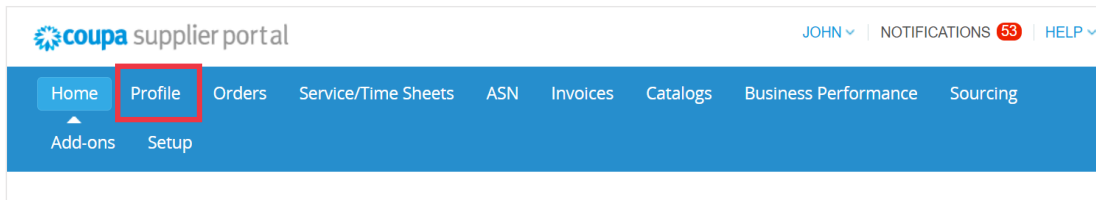
- 8. The delegate will receive an **email notification** that they have received a delegated DDQ to complete.



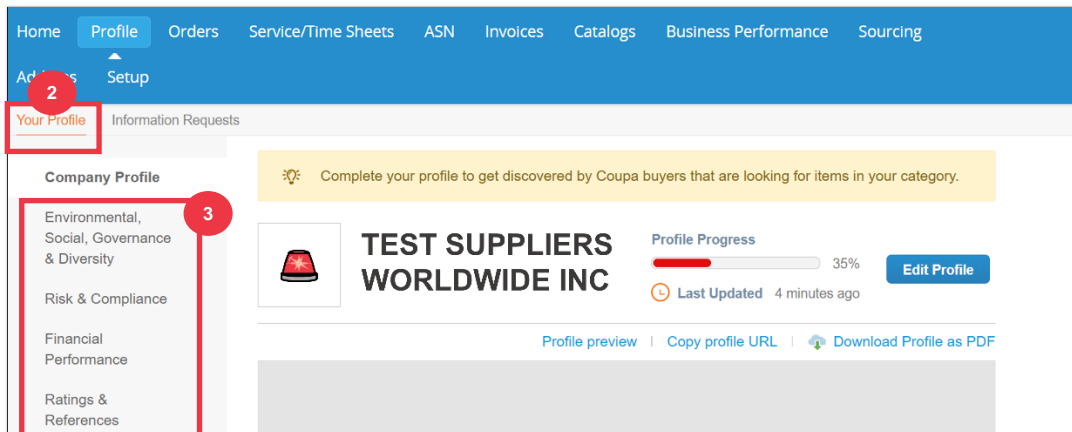
Updating Supplier Profile for General Information

After initially creating your public profile in CSP, use the following steps to make updates or edits to your general company information (company name, logo, website, industry, year of establishment, top commodities, currencies, diversity, and corporate social responsibility rating).

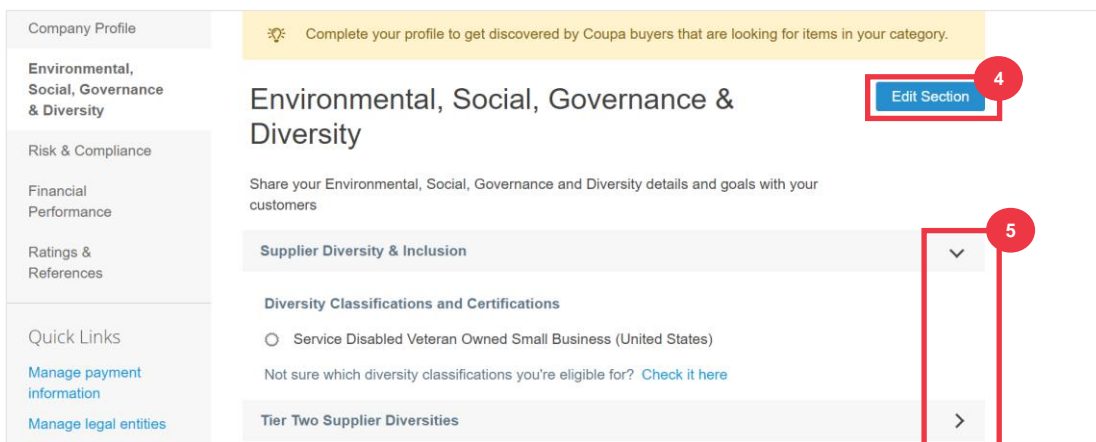
1. From the **CSP Home** screen, click the **Profile** tab.



2. Stay within the **Your Profile** tab.
3. Select which area of the profile requires editing from the menu listing.



4. Click the **Edit Section** button.
5. Click any of the **right-facing arrow** buttons to expand/collapse content within a particular section and provide any edits and/or updates for the desired section(s).



6. Scroll to the bottom of the page and select from the following:
 - a. **Save & Go to Next** (saves information entered and advances to the next sequential section in the menu listing)
 - b. **Save changes** (saves information entered and returns to the Profile screen)

Environment, Health & Safety (EHS)

Do you have a Health & Safety (H&S) policy in place?

Yes No

If you have a Health & Safety Policy in place, please describe.

Our objective is a safety and health program that will reduce the number of injuries and illnesses to an absolute minimum.

Cancel **6a** Save & Go to Next **6b** Save changes

Additional Resources

- [How to Navigate and Use the Coupa Supplier Portal – Quick Reference Card](#)
- [How to Respond to Risk Action Plans for Suppliers – Quick Reference Card](#)
- [How to Respond to the Supplier External Form - Bite Size Learning](#)
- [How to Complete and Delegate a DDQ \(Assessment\) - Bite Size Learning](#)
- [How to Respond to Risk Actions - Bite Size Learning](#)
- [Kimberly-Clark Supplier Link](#)