Powering K-C's digital future

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.*

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.

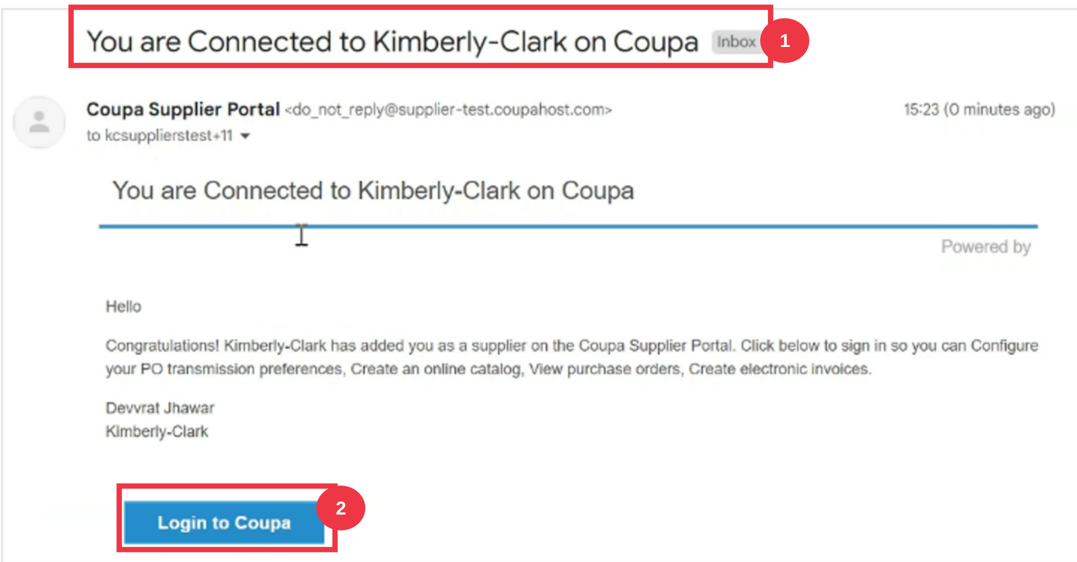
Key Terms

- **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: **You are Connected to Kimberly-Clark on Coupa.**
2. Click the **Login to Coupa** button from the invitation email.



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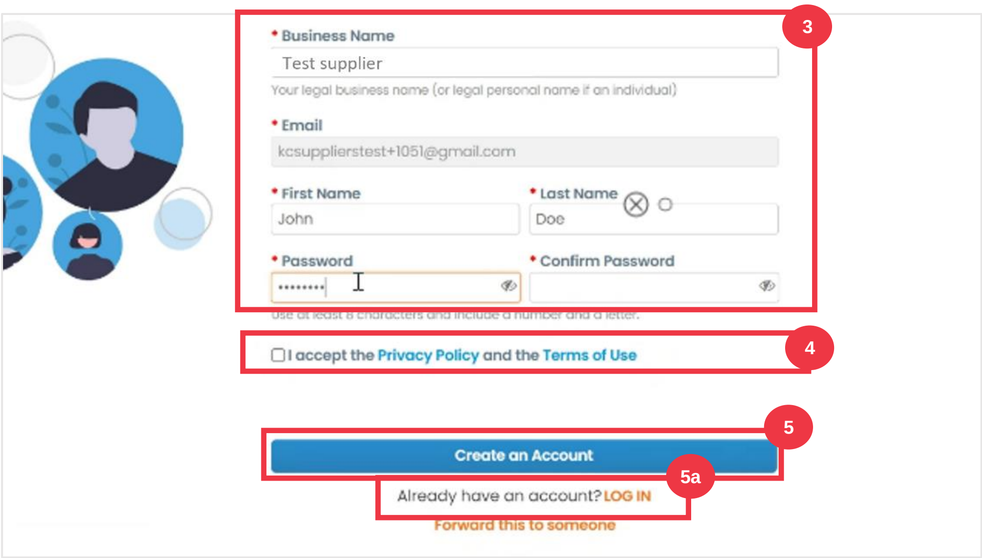
3. Enter the following information for the following fields (required fields are indicated by a red asterisk *). Provide your, **Business Name**, **Email address**, **First Name** (primary contact), **Last Name** (primary contact), and **Password** (alphanumeric, minimum 8 characters)
4. Select the **Privacy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

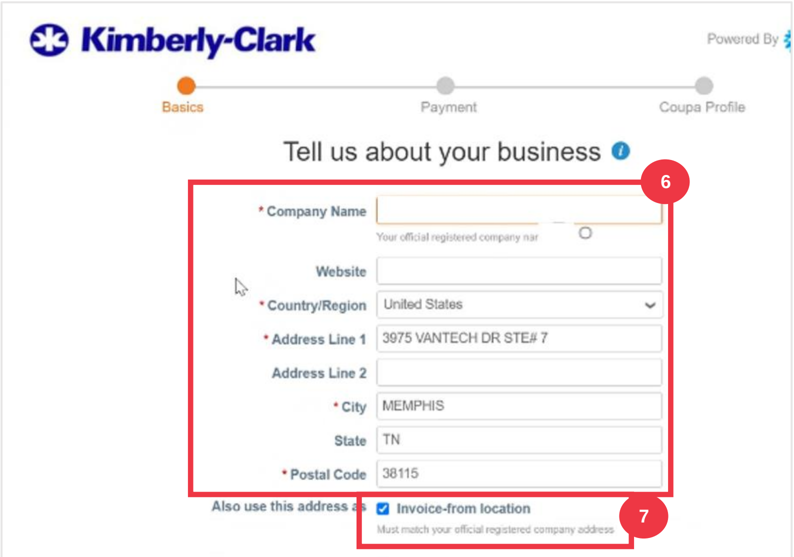
5. Click the **Create an Account** button when complete.
   a. Click the **LOG IN** link (if you have an existing CSP account).



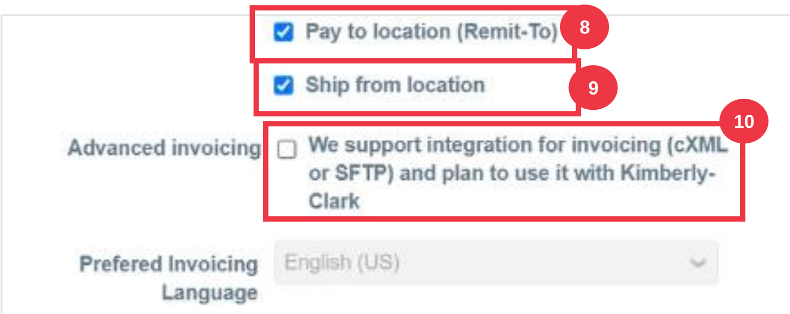
Note: Your CSP account is based on a specific email address. If you use an email address different from the one that K-C has on file for you, you cannot connect with them until you give them the email address or create a CSP account with that email address.

Please continue to the next page.

6. Enter the following information about your business for the following fields (required fields are indicated by a red asterisk *): **Company Name, Country/Region, Address, City, State, Postal code**
7. Select the **Invoice-from location** checkbox to set the address as your invoice address.



8. Deselect the **Pay to location (Remit-To)** checkbox if you do not want to receive payment for your invoices at the address on this screen.
9. Deselect the **Ship from location** checkbox if your ship-from address is different from your invoice-from address or you have more than one location.
10. Select the **We support integration for invoicing** checkbox if you plan to use cXML or SFTP transactions to send and receive between your system and K-C Coupa.



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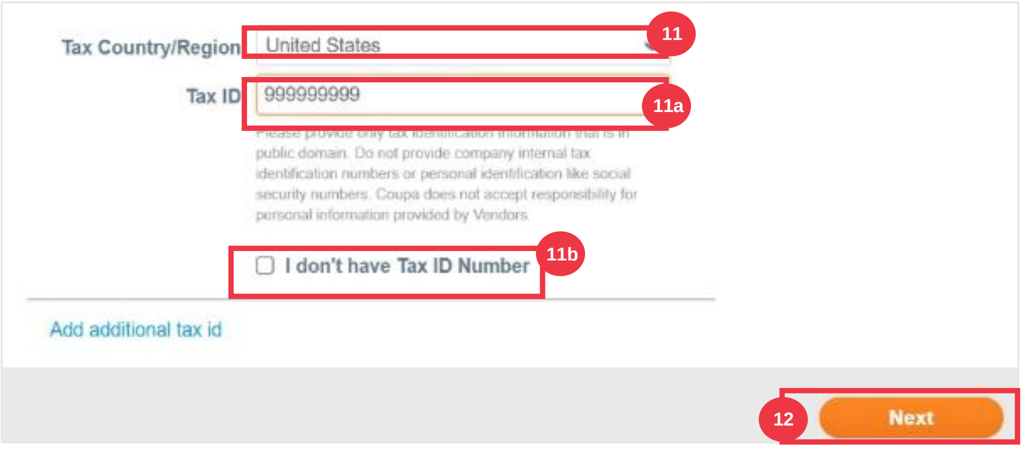
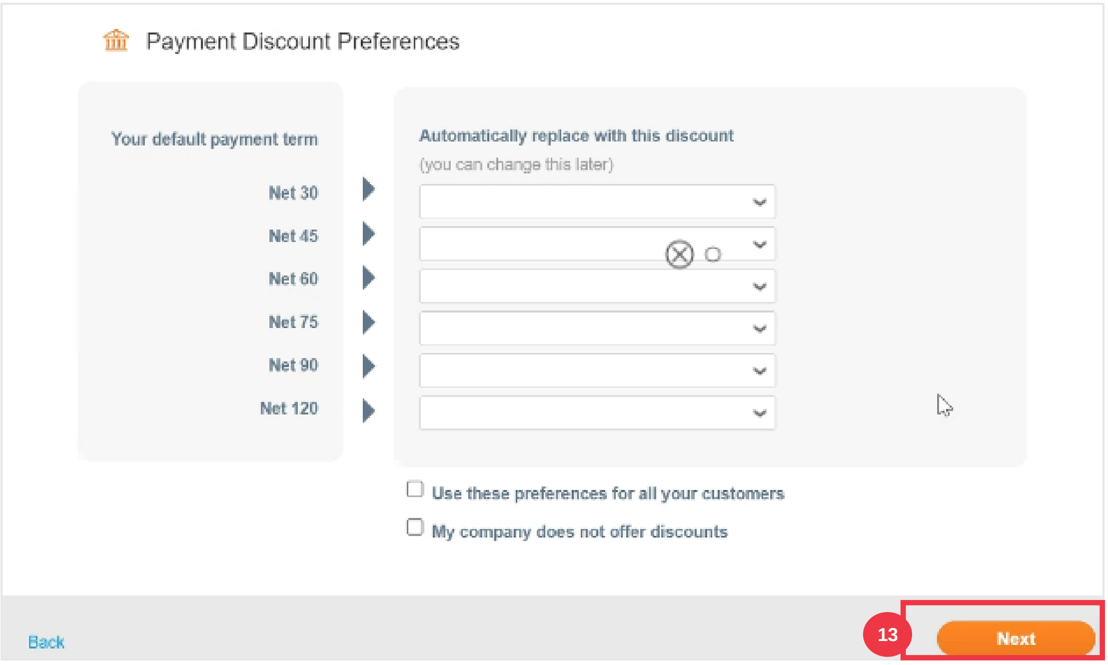
11. Select your tax country/region from the **Tax Country/Region** drop-down list.
    a. Enter your **Tax ID** information.
    b. If you do not have a Tax ID, select the **I don't have a Tax ID Number** checkbox).
12. Click the **Next** button.



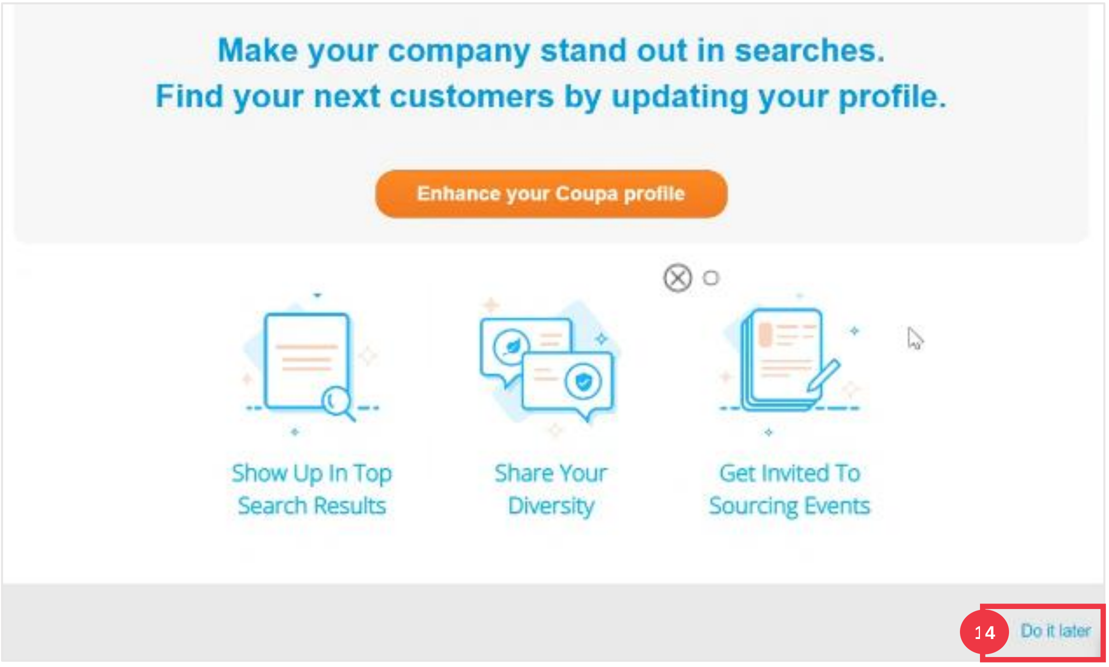
13. Click **Next** within the **Payment Discount Preferences** pop-up. **<u>Do NOT select nor provide any information on this screen.</u>**



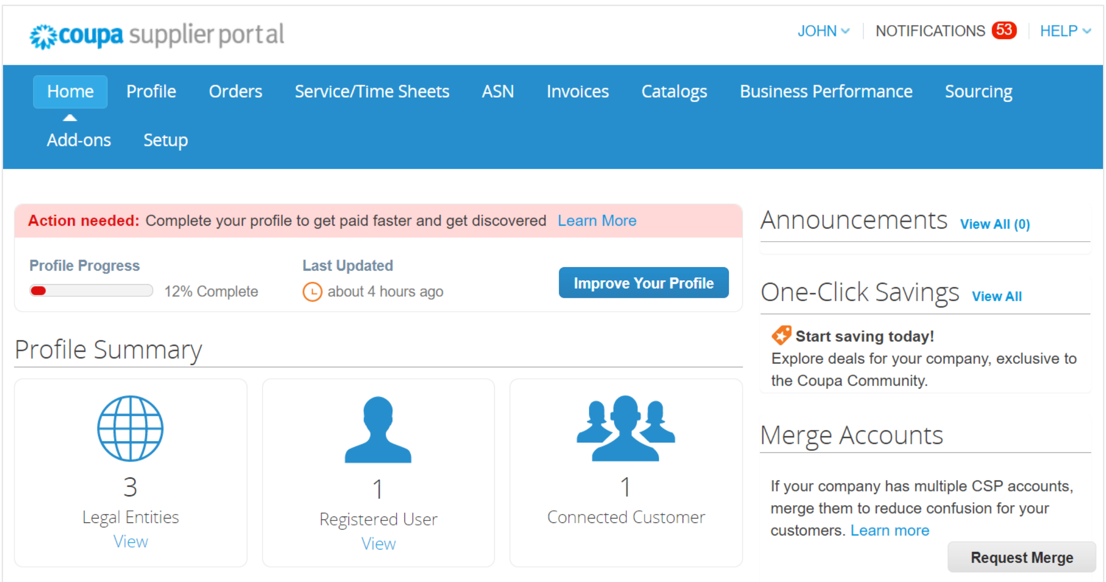
Note: Payment terms and preferences are outlined in accordance with the contractual agreements between your business and K-C.

14. Select **Do it later** within the **Enhance your Coupa profile** screen appears. **Do NOT provide any enhancements to your Coupa profile at this time.**

Note: Enhancing your Coupa profile is for personalization purposes and not needed for the registration process for K-C; providing more than the required profile information is optional.



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



Updating an Existing Supplier Profile via Kimberly-Clark Information Forms

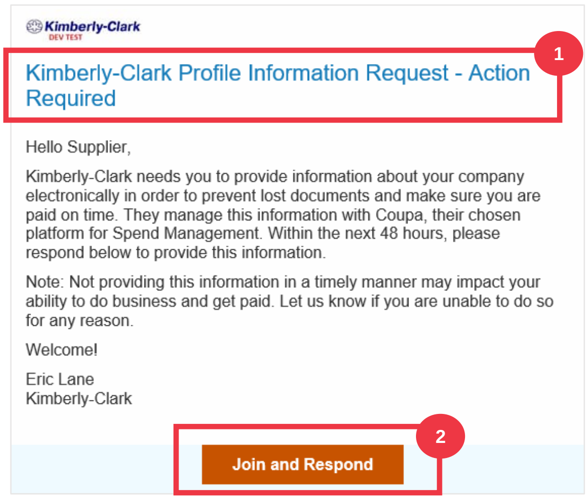
Suppliers who already transact with other customers via Coupa Supplier Portal will need to setup their existing CSP profile with Kimberly-Clark via the Supplier External Update form.

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

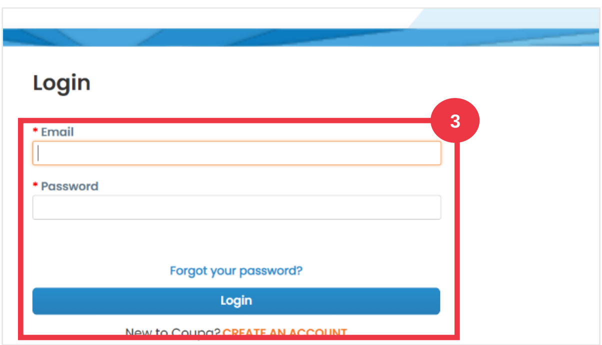
Note: It is important that suppliers complete the form to be setup and transact with Kimberly-Clark.

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).

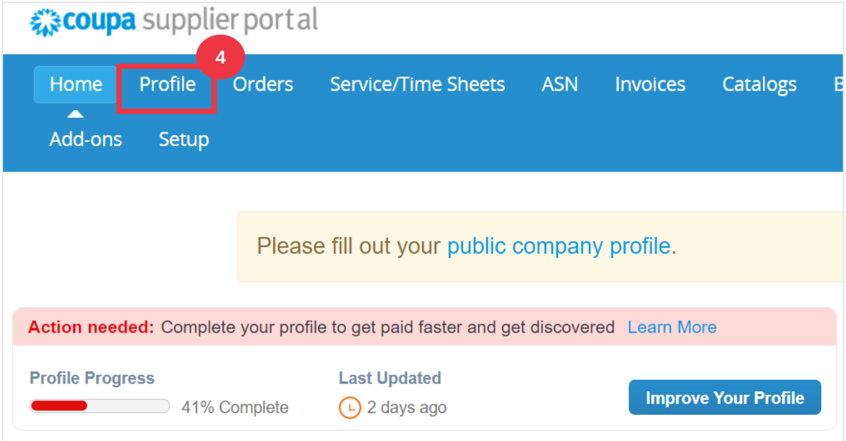
1. Suppliers will be sent an email invitation from the **Coupa Supplier Portal (do_not_reply@supplier.coupahost.com)** with the subject line, **Kimberly-Clark Profile Information Request – Action Required.**
2. Click the **Join and Respond** button from the invitation email.



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



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

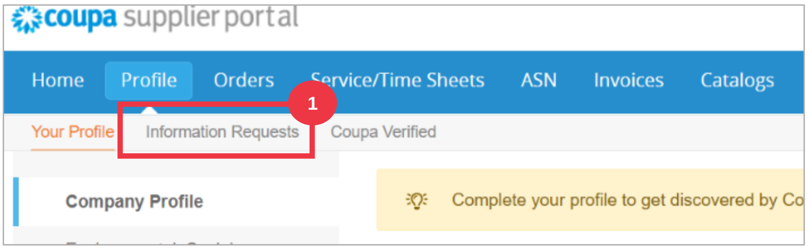


Completing (or Delegating) a Supplier External Update Form

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.

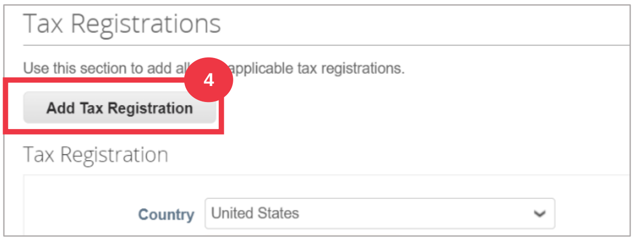
Once added, a new contact will be able to access the External Form from the CSP homepage under **Information Requests.** To complete the request for the External Form continue to perform the following steps in the CSP.

1. Click the **Information Requests** subtab.



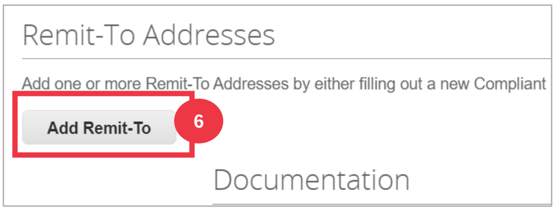
2. The **Supplier External Update** form will load.
3. Some fields will **auto-fill** from prior information from your company's public profile. Please update any information that may have changed in the required fields (*).
   a. Review the following sections to ensure the accuracy of auto-filled information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

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



5. Select the radio button option **Yes or No** for the **Do you need to add a Remit To/Bank Details?** question to add or update banking information.

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



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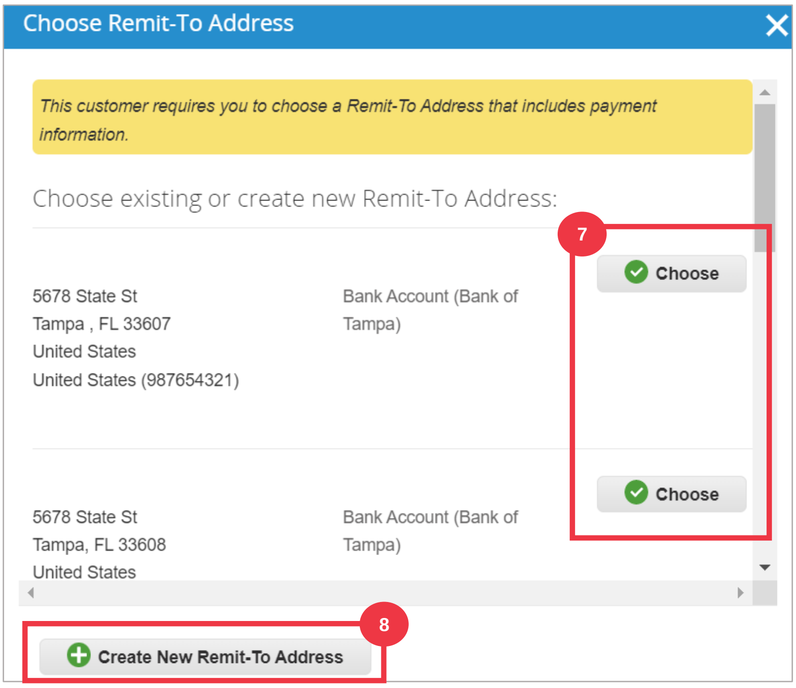
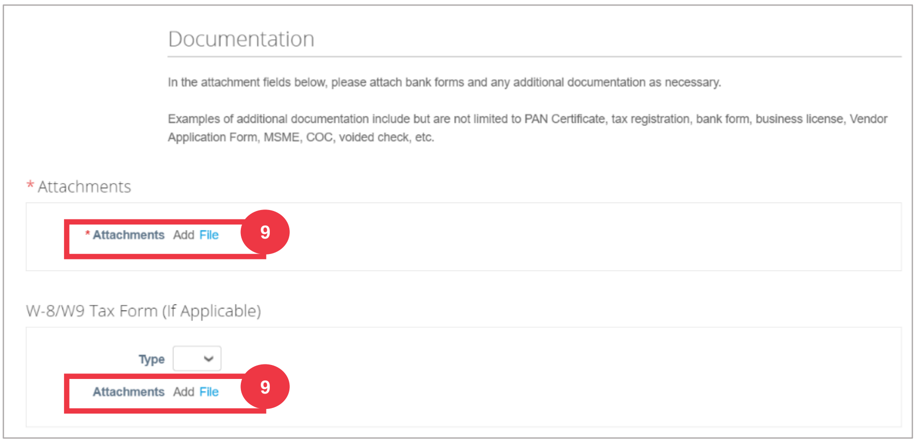
The **Choose Remit-To Address** screen appears.

7. Click the **Choose** button to add existing banking information.
8. 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.



9. In the **Documentation** section, upload any relevant banking and tax documents using the **Attachments Add File** link.

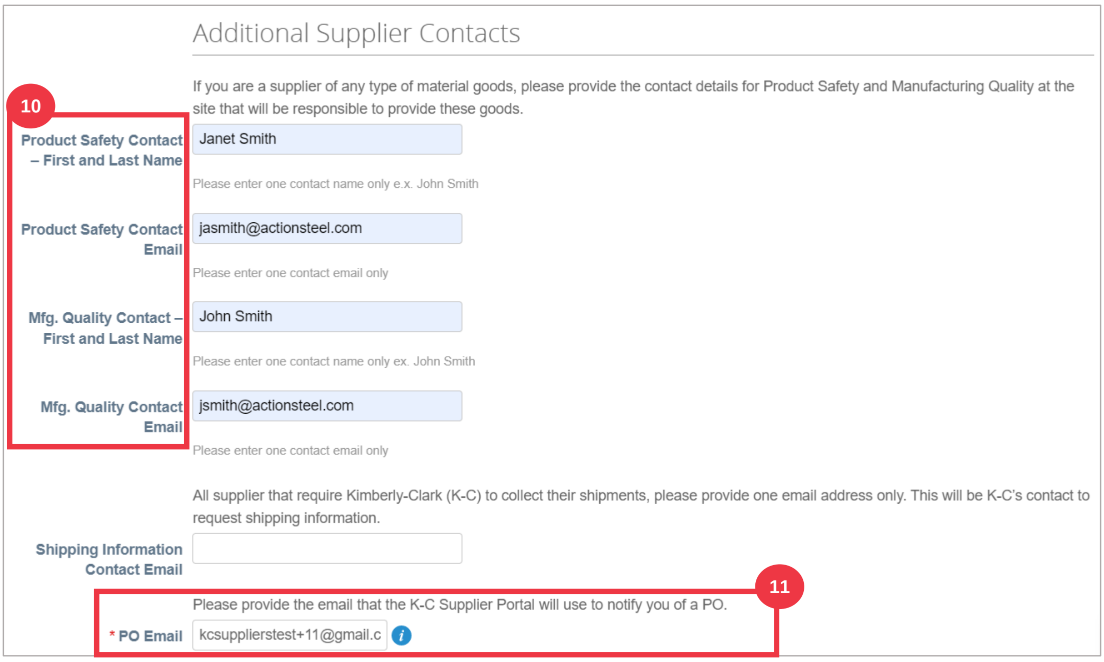


Documentation might include:

- **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.)

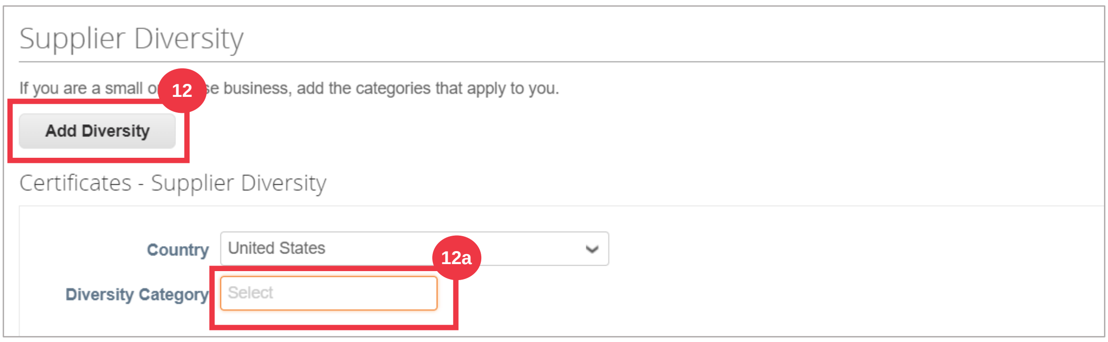
- **Other supporting attachment information** (e.g., Ministry of Micro, Small & Medium Enterprises (MSME) certification, Certificate of Conformance (COC), or vendor application form).

10. In the **Additional Supplier Contacts** section, provide a **Product Safety and Mfg. Quality** point of contact.
11. Verify the **PO Email address** entered is correct.

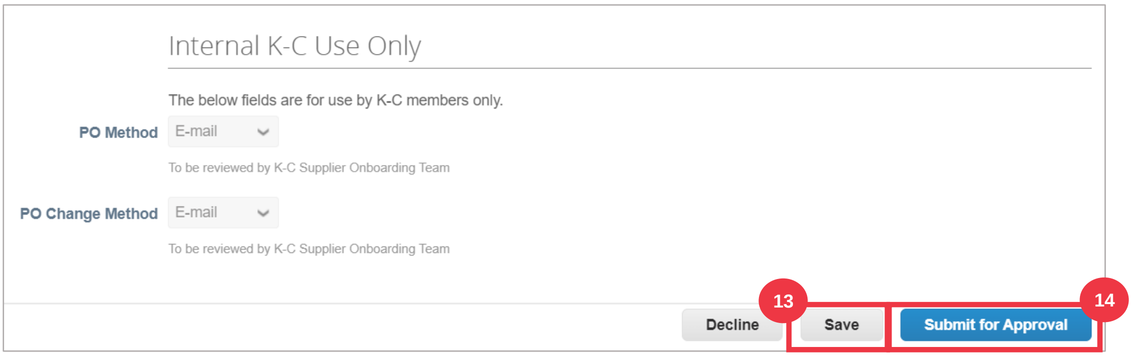


The Coupa Supplier Portal allows suppliers to share their Environmental, Social, Governance and Diversity details with their customers. After clicking the Add Diversity button select from the diversity categories.

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



13. Click the **Save** button to save the information entered.
14. Click the **Submit for Approval** button to submit the form to Kimberly-Clark 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.

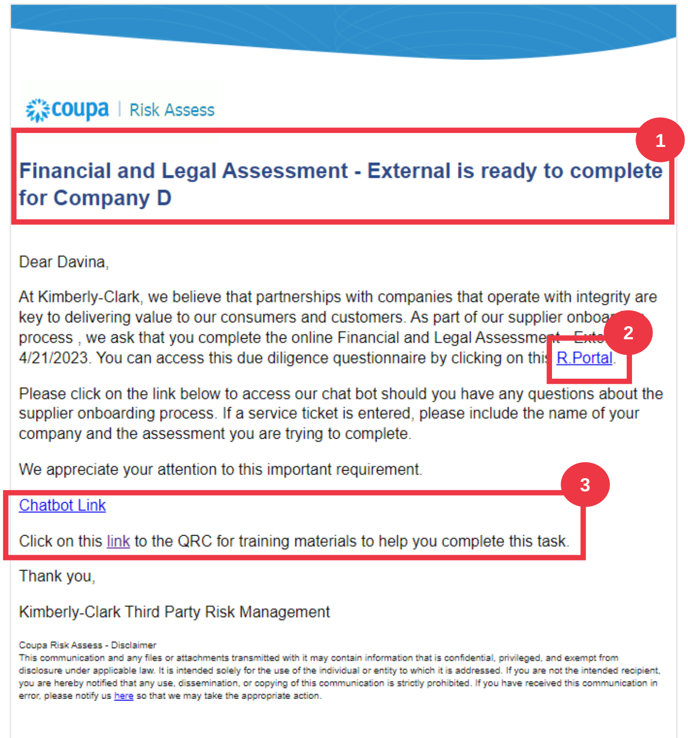
Completing a Financial and Legal Assessment

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)


coupa | Risk Assess

1

Financial and Legal Assessment - External is ready to complete for Company D

Dear Davina,

At Kimberly-Clark, we believe that partnerships with companies that operate with integrity are key to delivering value to our consumers and customers. As part of our supplier onboar process , we ask that you complete the online Financial and Legal Assessment - Exte 4/21/2023. You can access this due diligence questionnaire by clicking on thi R.Portal.

2

Please click on the link below to access our chat bot should you have any questions about the supplier onboarding process. If a service ticket is entered, please include the name of your company and the assessment you are trying to complete.

We appreciate your attention to this important requirement.

3

Chatbot Link

Click on this link to the QRC for training materials to help you complete this task.

Thank you,

Kimberly-Clark Third Party Risk Management

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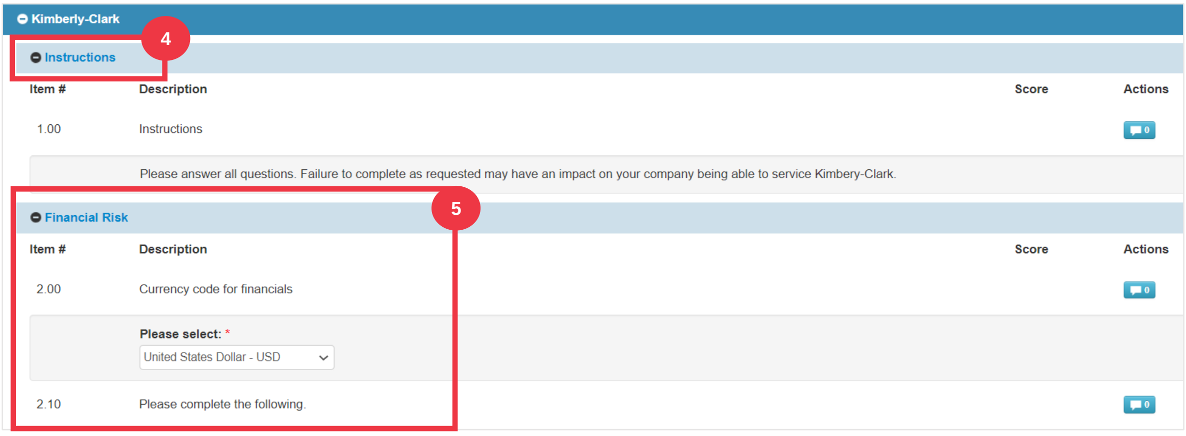
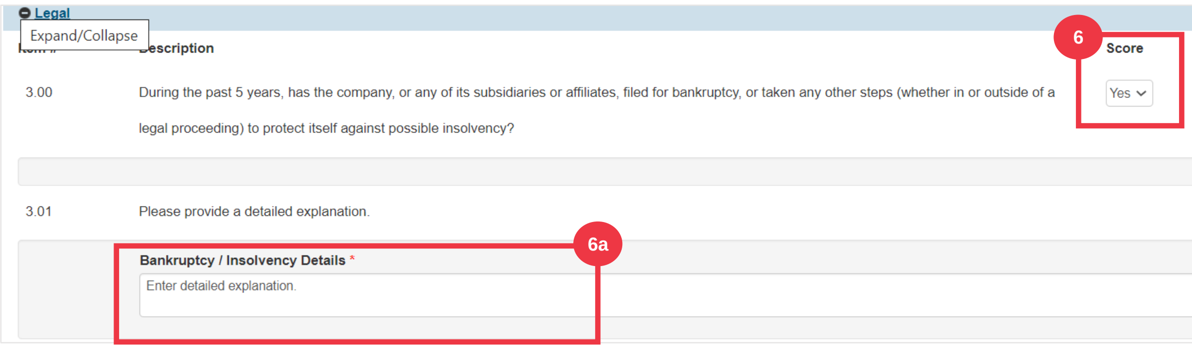
4. Click the **Instructions** button to expand the instructions for form completion.

> **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.

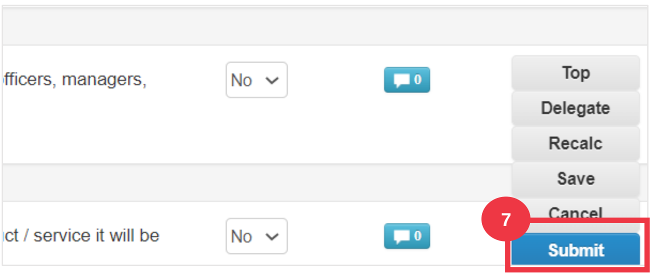
5. In the **Financial Risk** section, provide the information to complete all applicable field. Please remember to complete all required (*) fields.



6. 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.
   a. Note, selecting **Yes** to some questions will prompt additional required fields to provide a more detailed explanation for the answer choice.



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

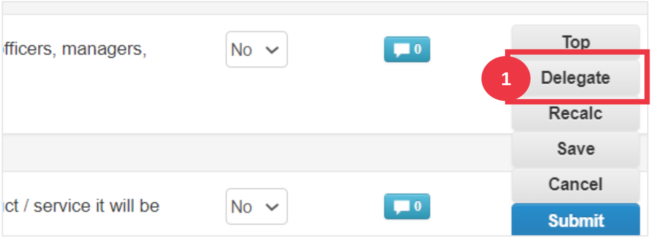


Delegating a Financial and Legal Assessment

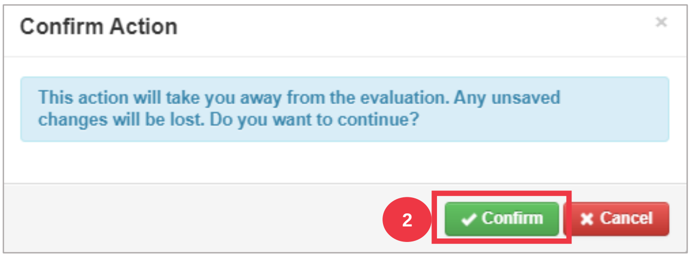
If a Financial and Legal Assessment needs to be reassigned for completion by another individual in the organization, follow these steps.

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.

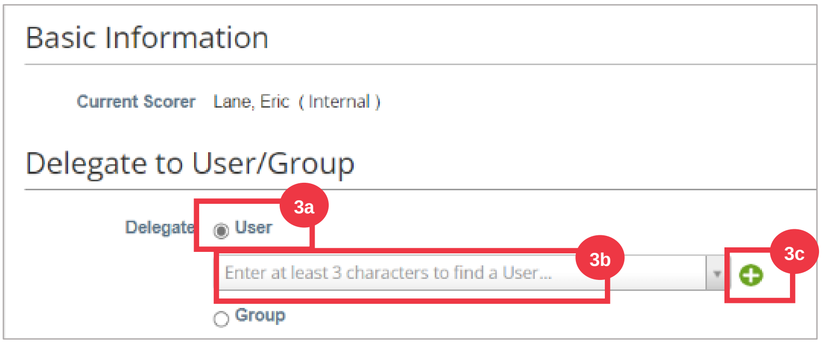
1. At the bottom of the assessment, select **Delegate** to assign the completion to someone else.



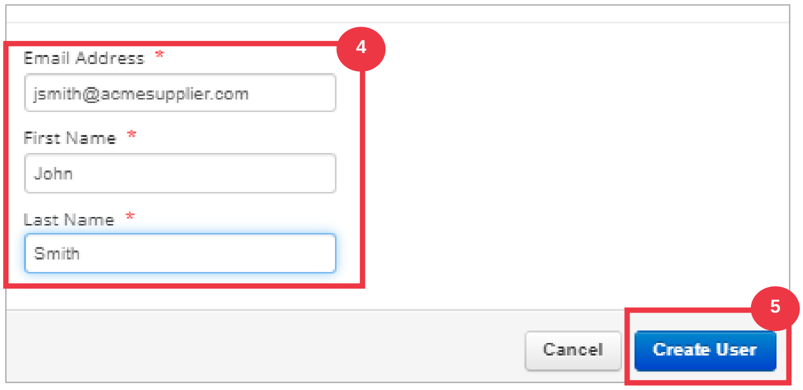
2. Click **Confirm** within the pop-up.



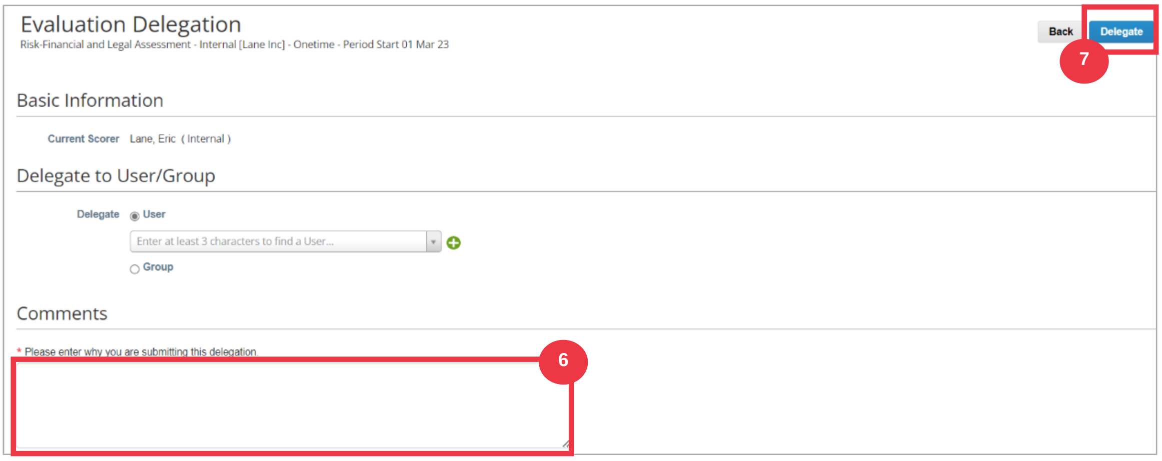
3. Add a delegate.
   a. Select **Delegate User** within the **Delegate to User/Group** section.
   b. If you are adding a current contact, search for and select a user within the search bar.
   c. If you are adding a user who is not a current contact, select the **+ button** and continue to **Steps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



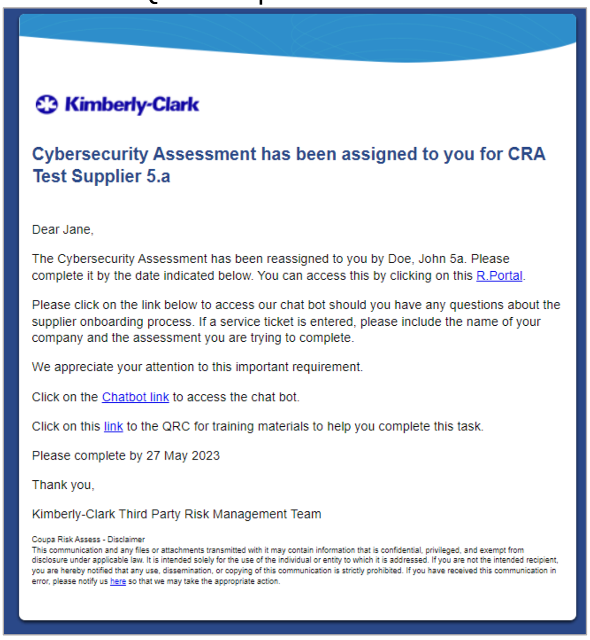
4. Enter the delegate’s details within the required fields.
5. Click **Create User**.



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.


Kimberly-Clark

Cybersecurity Assessment has been assigned to you for CRA Test Supplier 5.a

Dear Jane,

The Cybersecurity Assessment has been reassigned to you by Doe, John 5a. Please complete it by the date indicated below. You can access this by clicking on this R Portal.

Please click on the link below to access our chat bot should you have any questions about the supplier onboarding process. If a service ticket is entered, please include the name of your company and the assessment you are trying to complete.

We appreciate your attention to this important requirement.

Click on the Chatbot link to access the chat bot.

Click on this link to the QRC for training materials to help you complete this task.

Please complete by 27 May 2023

Thank you,

Kimberly-Clark Third Party Risk Management Team

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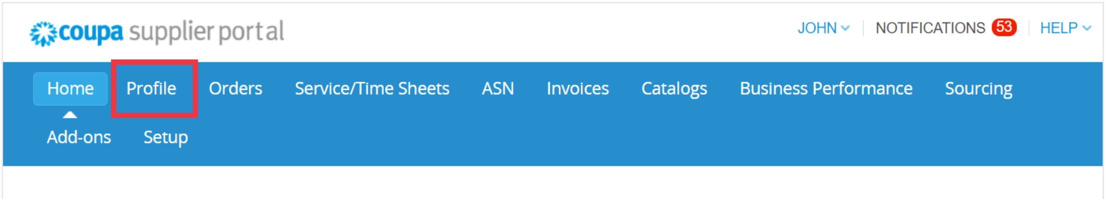
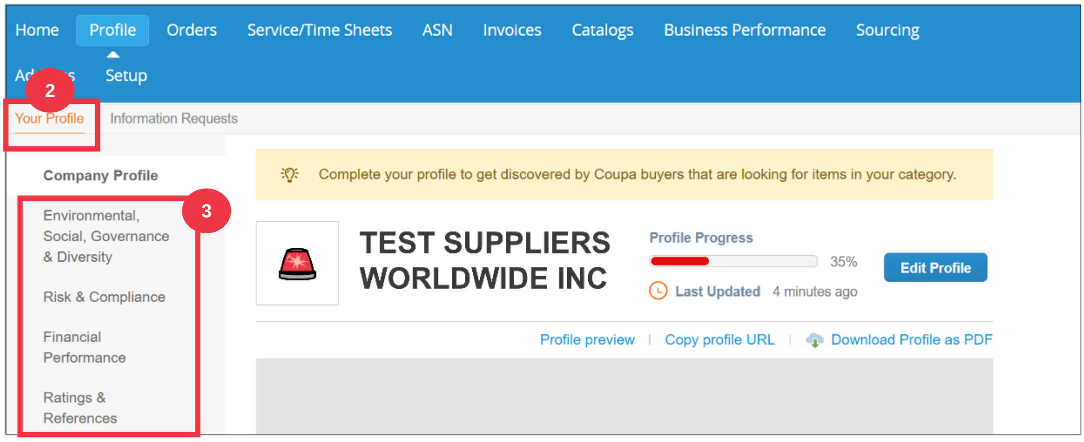
Updating Supplier Profile for General Information

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).

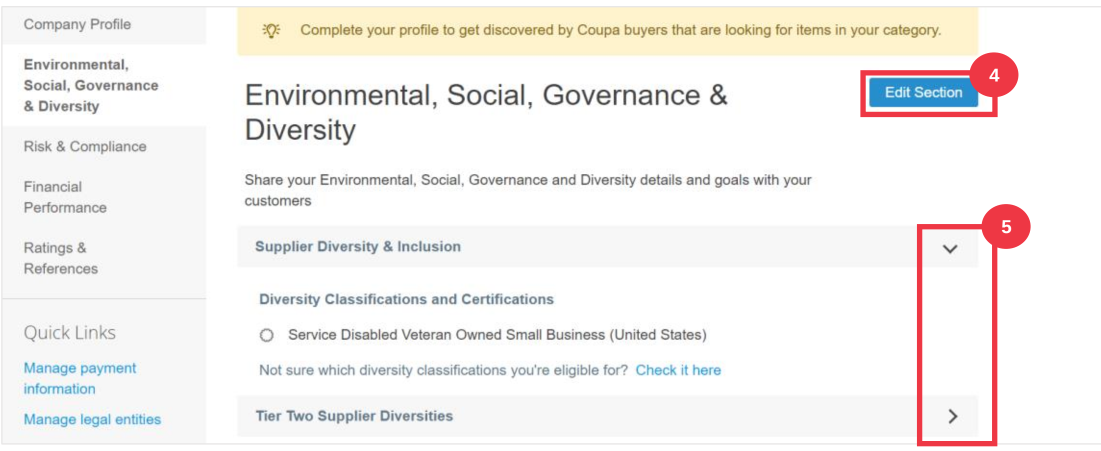
1. From the **CSP Home** screen, click the **Profile** tab.



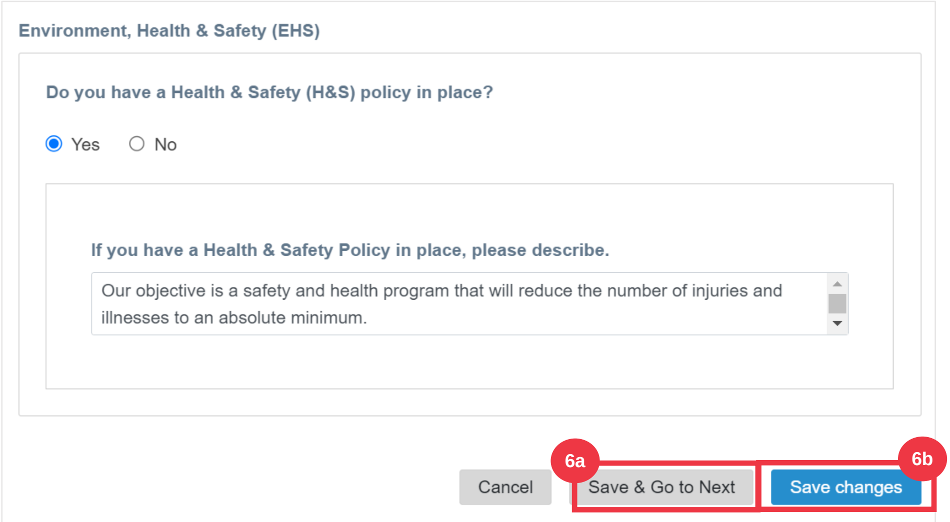
2. Stay within the **Your Profile** tab.
3. Select which area of the profile requires editing from the menu listing.



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)



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