softserve

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1. Invitation message

In order for SoftServe to assess the capabilities of cooperation with your company, you need to go through the registration and verification procedure.
In your email you will receive the letter from **Coupa Supplier Portal** with details.
Inside will be a brief description of what to do and a link to the e-questionnaire.

Example of the letter

For your convenience, there are two options:

The first is to fill in the application form without registration and creating a profile on the Coupa supplier portal. In this case, the system will open an electronic questionnaire, in which you need to enter the necessary information.

The second is to join the Coupa Supplier Portal (CSP). This portal is completely free for suppliers. In this case, you will be able to:

- Create your profile and use various options (for example, receive orders, maintain catalogs of your products, send invoices, track the payment for the orders, etc.).

- After registration, you will have access to a database of customers who also use the Coupa worldwide. You will be able to send requests for cooperation, and all your products or services will be available for all users of the portal.

## 2.	Respond Without Joining

After you press **Respond Without Joining**, the system automatically opens a window with an additional question.

Choose your country from the dropdown. If you cannot find your country in the list, choose the International option.

The system automatically opens the window with the appropriate questionnaire.

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Example of the questionnaire

Supplier Information   New company

    * Company name   New company

Field "**Company name**" is auto filled by default, but you are able to make changes if needed.

* Primary Address

Address Purposes ⓘ   Select Some Options

    * Region
Country/Region

State Region   Select an Option

Address Name

* Street Address

Street Address 2

* City

* Postal Code

Location Code

Field "**Primary address**" here you need to provide the legal registration address of your company.

Please, pay attention to the **mandatory fields**, they are marked with a red star.

* Primary contact data

    * First Name

    * Last Name

    * Email Address   ⓘ

Field "**Primary contact data**" is auto filled by default, but you are able to make changes if needed.

* Registration number

DUNS Number   ⓘ

Please add ultimate
beneficiary owner

Field "**Registration number**" here you need to provide your company's registration number.

Please follow the link and read SoftServe eligibility criteria and Supplier code of conduct

🔗 https://www.softserveinc.com/en-us/beco…

Follow the link and read our documents for the suppliers, to know better SoftServe's rules and expectations.
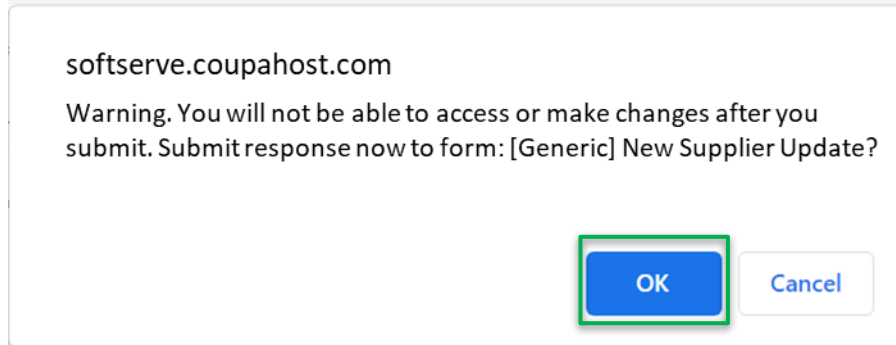
*I agree to the SoftServe's Eligibility criteria and Supplier code of conduct and have read them

☐

Decline   Submit

After you press **Submit**:

After you filed in need information check it and press **Submit**.

- If everything is clear, system shows a warning message to confirm your answers. In this case press **OK**.

Example of the warning message

softserve.coupahost.com

Warning. You will not be able to access or make changes after you submit. Submit response now to form: [Generic] New Supplier Update?

OK   Cancel

- If any mistake, the system highlights the place where you missed filling in the information. Please, add the needed information and press **Submit**.

Example of the typical mistake

Please fix the errors below

Supplier Information   HEALTH WELLBEING SERVICES SP. Z O.O. (BOBO Coworking)

* Nazwa firmy | HEALTH WELLBEING SERV |

·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

* Główna osoba kontaktowa:

* Imię | |
* Nazwisko | |
* E-mail | |

In this case, you need to press **Add Remit-To**, and the system opens the table where you need to provide the required information.

3. Join and Respond via Coupa Supplier Portal

If you choose this option, you need:
- create an account on Coupa supplier portal.

Example of the account creation

Powered by **coupa**

Create your business account

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

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

☐ I accept the Privacy Policy and the Terms of Use.

Get Started

> Field "**Email**" is auto filled by default, you cannot change it here.
> Create the **Password**, confirm it and accept the Privacy Policy.
> To continue press, **Get Started**.

- After you press **Get Started**, the system automatically opens window with additional questions.

Example of the additional questions

Powered By **coupa**

Basics ————————————— Profile

Tell us about your business ⓘ

* Company Name   New company
Your official registered company name

Website

* Country/Region

* Address Line 1

Address Line 2

* City

State   Example: CA

* Postal Code

> Field "**Company name**" is auto filled by default, but you are able to make changes if needed.

> In the part of **address** information here you need to provide the legal registration address of your company.
> Please, pay attention to the **mandatory fields**, they are marked with a red star.
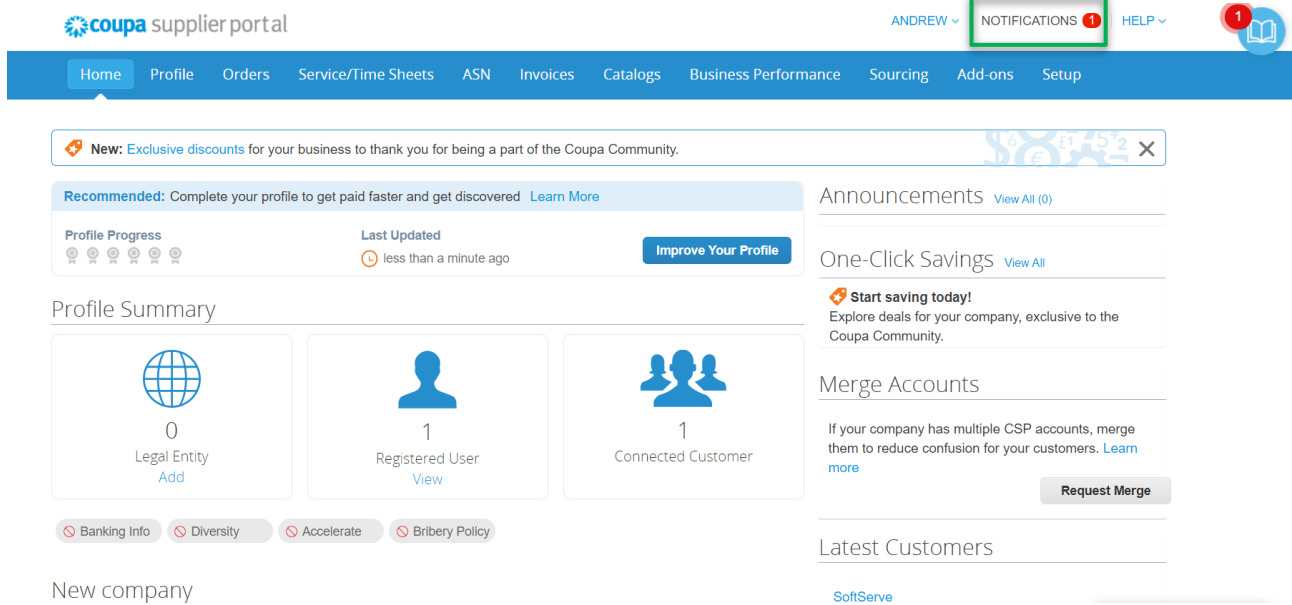> After you filed in need information check it and press **Next**.

✓ All set for now. On your first invoice with SoftServe, we will guide you through your legal entity setup.

Next

- System opens your company profile.

Press **Notification** to see all requests and messages.

Example of the company profile

The system shows all new requests or messages for you in the Notification tab.

- To see information or action what you need to do press on needed message.

Also, here you have possibility to manage notications:

Use **View** - to sort all your notifications into different categories;
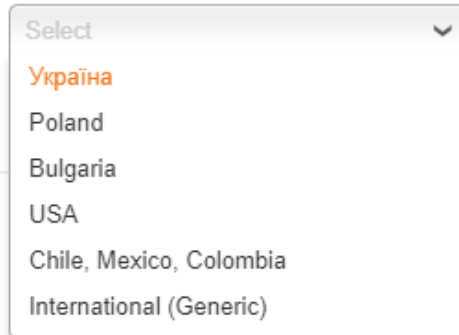
Use **Delete** – to drop chosen notification;

Use **Mark as Read** – to mark a chosen notification as read without opening.
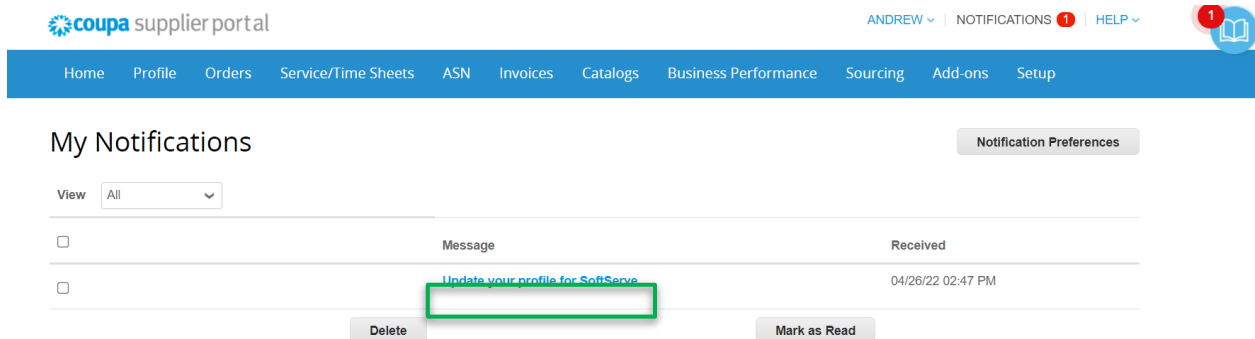
- System automatically opens new questionnaire or message.
- In the case of questionnaire, choose your country from the dropdown. If you cannot find your country in the list, choose the International option.

Supplier Information

* Please, choose your country/region of operation

Select ⌄
Україна
Poland
Bulgaria
USA
Chile, Mexico, Colombia
International (Generic)

- The system automatically opens the window with the appropriate questionnaire.

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Example of the questionnaire

SoftServe

Profile SoftServe ▾

✔ We have auto-filled some information from your Public Profile.   ✕

❶

Supplier Information New company

* Company name New company

> Field "**Company name**" is auto filled by default, but you are able to make changes if needed.

* Primary Address

Address Purposes ⓘ Sel

* Region
Country/Region Ukraine ▾

State Region

Address Name

* Street Address Naukova

Street Address 2 116

* City Lviv

* Postal Code 79069

Location Code

> Field "**Primary address**" is auto filled by default, but you are able to make changes if needed.
> Please, pay attention to the **mandatory fields**, they are marked with a red star.

* Primary contact data

* First Name Andrew

* Last Name Door

* Email Address _____ ⓘ

> Field "**Primary contact data**" is auto filled by default, but you are able to make changes if needed.

* Registration number _____

DUNS Number _____ ⓘ

Please add ultimate beneficiary owner _____

> Field "**Registration number**" here you need to provide your company's registration number.

Please follow the link and read SoftServe eligibility criteria and Supplier code of conduct

🔗 https://www.softserveinc.com/en-us/beco...

> Follow the link and read our documents for the suppliers, to know better SoftServe's rules and expectations.

* I agree to the SoftServe's Eligibility criteria and Supplier code of conduct and have read them
☐

Decline   Save   **Submit for Approval**

> To submit your answers press, **Submit for Approval**.
> **Pay attention if you did not submit your answers requestor will not receive them.**

Enter Comment

[   ]

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

Add Comment

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4. Communication via onboarding process

In the comments section you have possibility to communicate with requestor.
Enter your message into the comment section and press **Add Comment**.

Example of the communication

- After you Submit answers system sends you notification that your company's information was changed.
- If cooperation **approved**, you receive message:

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In case, you have any questions you can send them on an Email
vendormgmt@softserveinc.com

SoftServe <do_not_reply@softserveinc-test.coupahost.com>
кому: мне ▾

softserve   Info submitted to SoftServe was Approved

Powered by ❄️coupa

Hi Supplier,

Thank you for applying!

Unfortunately, at the moment we have to refuse your request for collaboration.

If you would like to get more details, please contact us on an e-mail: vendormgmt@softserveinc.com

Regards,

SoftServe procurement team

View Profile Info

5. Video guides how to use Coupa Supplier Portal (CSP):

- Coupa supplier portal (CSP) introduction
- Your Coupa supplier portal (CSP) profile
- Coupa supplier portal help messages
- How to administrate your CSP profile?
- How to view announcements on your CSP profile?
- How to view received orders on your CSP profile?
- How to create invoices on your CSP profile?
- How to create catalogs on your CSP profile?
- How to set payment preferences (static discounting) on your CSP profile?
- How to create one-Click Savings on your CSP profile?