

**Coupa Quick
Reference Guide for
Suppliers | Supplier
Information
Management (SIM)**

Sign-Up to the CSP

You will be notified via email that Schaeffler would like to onboard you as a supplier or if you need to update your information, such as legal entity, address and contact details. Please click “Join and Respond” to sign-up to the Coupa Supplier Portal (CSP).



Hello Supplier,

Schaeffler needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 48 hours, please respond below to provide this information.

Welcome!

Schaeffler

[Join and Respond](#)



Note:

Please check your spam folder for this email and note that this invitation will **expire in 48 hours**. This means that you won't be able to use this link anymore.

Getting started

You will be asked to create a business account. Please create and confirm your password. Click “*Get Started*” to continue.

A screenshot of the Coupa 'Create your business account' form. The form includes the Coupa logo, the title 'Create your business account', a sub-header 'Schaeffler Group is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Schaeffler Group so you're ready to do business together.', and input fields for 'Email' (pre-filled with 'schaefflercoupatest+lukeharrer@gmail.com'), 'Password', and 'Password Confirmation'. Below the password fields is a checkbox for 'I accept the Privacy Policy and the Terms of Use'. A prominent orange 'Get Started' button is highlighted with a red border. At the bottom, there are links for 'Having an issue with signup?' and 'Forward this to someone'.

Note:

If you already have an account with Coupa please log in with your details.

Getting started

The given data has been provided by Schaeffler. Please check and if needed change all relevant information. Fill in missing information.

All fields marked * are mandatory.

To continue click “Next”.

A screenshot of the 'Tell us about your business' form in the Coupa Supplier Portal. The form is titled 'Tell us about your business' and has a progress indicator at the top with three steps: 'Basics' (selected), 'Payment', and 'Profile'. The 'Basics' section contains several mandatory fields marked with an asterisk (*):

- * Company Name: Luke J. Harref (with a subtext 'Your official registered company name')
- Website: (empty)
- * Country/Region: Germany (dropdown menu)
- * Address Line 1: Ingoldstadter Weg 185
- Address Line 2: (empty)
- * City: Berlin
- State: (empty)
- * Postal Code: 10589

At the bottom of the form, there is a green checkmark icon and the text: 'All set for now. On your first invoice with Schaeffler Group, we will guide you through your legal entity setup.' A red-bordered 'Next' button is located at the bottom right of the form.

Getting started

Here you have the option to enter payment discounts. However, this information is not relevant for Schaeffler and can be skipped.

To continue click “Next”.



SCHAEFFLER

Powered By coupa

Basics Payment Profile

Would you like to offer discounts to get paid faster?

Payment Discount Preferences

Your default payment term	Automatically replace with this discount (you can change this later)
Net 30	0.5%/20 NET 30
Net 45	1%/25 NET 45
Net 60	2.5%/10 NET 60
Net 75	2%/35 NET 75
Net 90	None
Net 120	None

Use these preferences for all your customers

Back Next



Note:

You can select that all payment discount preferences will be used for all clients.

Filling in additional information for Schaeffler



Schaeffler requires additional information from you.

To continue and fill out the information click *“Take Me There”*.



SCHAEFFLER

Powered By coupa

Basics Payment Profile

You are one step away from doing business with Schaeffler Group !

Schaeffler Group requires some additional information

Take Me There

Language settings

To change the language, please scroll to the bottom of the page and **click on the region to select your desired language.**



Filling in additional information for Schaeffler



Please insert all required information.

All fields marked * are mandatory.



Financial Data



Please insert all required information.

All fields marked * are mandatory.



2. Financial Data

* Do you have a VAT ID? Yes No

* VAT ID
Without blanks in a format such as: (DE)987654321

Second VAT ID
If you intend to ship to Schaeffler from a third country please provide a VAT number for that country

Tax / Bank Information Certificate

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

If you have a Bank Certification or a TAX ID Certificate (e.g. VAT ID or GST) please add it here.

If you are an individual and not a business, please mark the checkbox.

Code of Conduct



- 1 Please download the Code of Conduct by clicking on the Link, sign it and
- 2 upload it back to CSP by clicking on “File”.

All fields marked * are mandatory.



3. Certified Management System

1

* Please upload a signed copy of the Schaeffler Supplier Code of Conduct.

2

* Attachments

Description

Choose the Expiry Date: 31.12.9999

Certificates and form submission

Before you can submit your information to Schaeffler you will be asked some questions regarding regions where you will be providing Schaeffler with your item/services.

Please provide additional information if you have selected “Yes”.

All fields marked * are mandatory.



* Do you plan to make business with Schaeffler in the US or Canada? Yes No

* Do you plan to do business with Schaeffler in the US or Canada and are you registered as a Diverse/Minority supply? Yes No

* Do you plan to do business with Schaeffler in India? Yes No

* Do you plan to do business with Schaeffler in China? Yes No

* Do you offer calibration services? Yes No

* ISO 17025 Certificate/ Relevant related Documents

Effective Date

* Expiration Date

* Attachments [Add File](#)

Description

Please add your Certification and additional relevant documents of proof about the area in which you are certified exactly. Please add an expiry date.



Note:

Questions and mandatory field may vary depending on the region or category in which you are doing business with or they may be asked differently.

Certificates and form submission

Please upload all certifications and information that is relevant for doing business with Schaeffler.

Once you filled in all information continue by clicking *“Submit for Approval”*.



ISO 14001

Effective Date

Expiration Date

Attachments [Add File](#)

Description

IATF 16949

Effective Date

Expiration Date

Attachments [Add File](#)

Description

Formerly ISO TS 16949

Additional information

Conflict Minerals

Effective Date

Expiration Date

Attachments [Add File](#)

Description

[Decline](#) [Save](#) [Submit for Approval](#)

Comments

Enter Comment

[Add Comment](#)

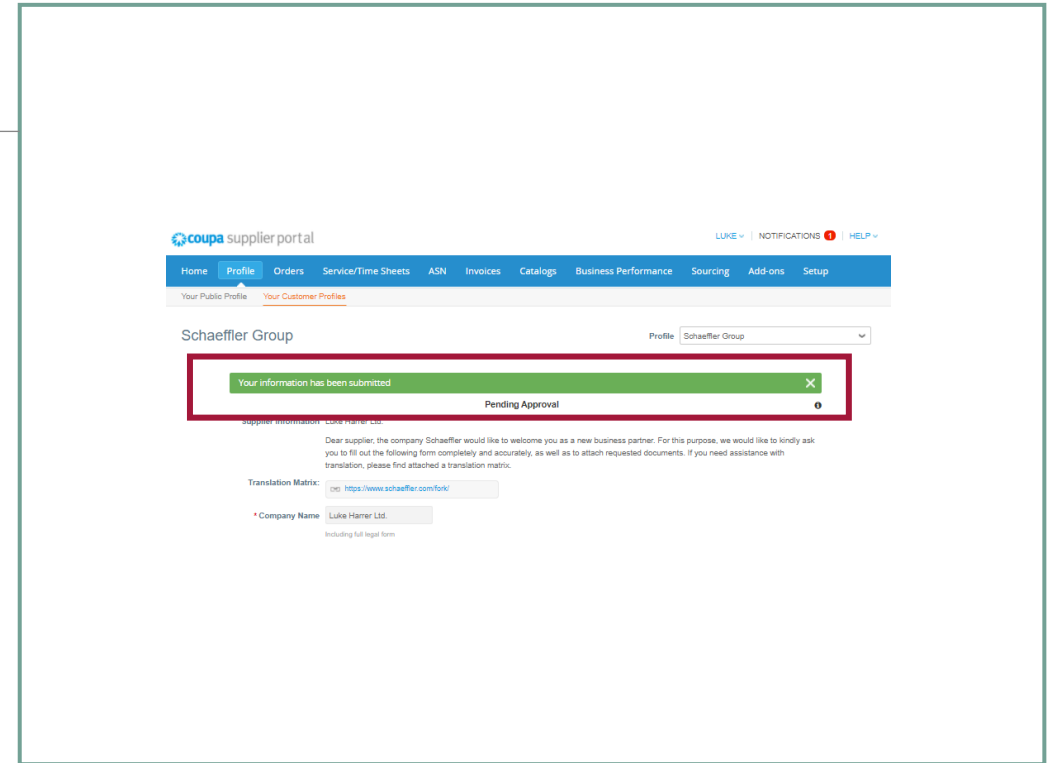


Note:
If you have questions for Schaeffler, please use the Comment function.

Form submission & approval

Once you have submitted your form it must be approved by a Schaeffler employee.

The status of your form will appear at the top of your Customer Profile.

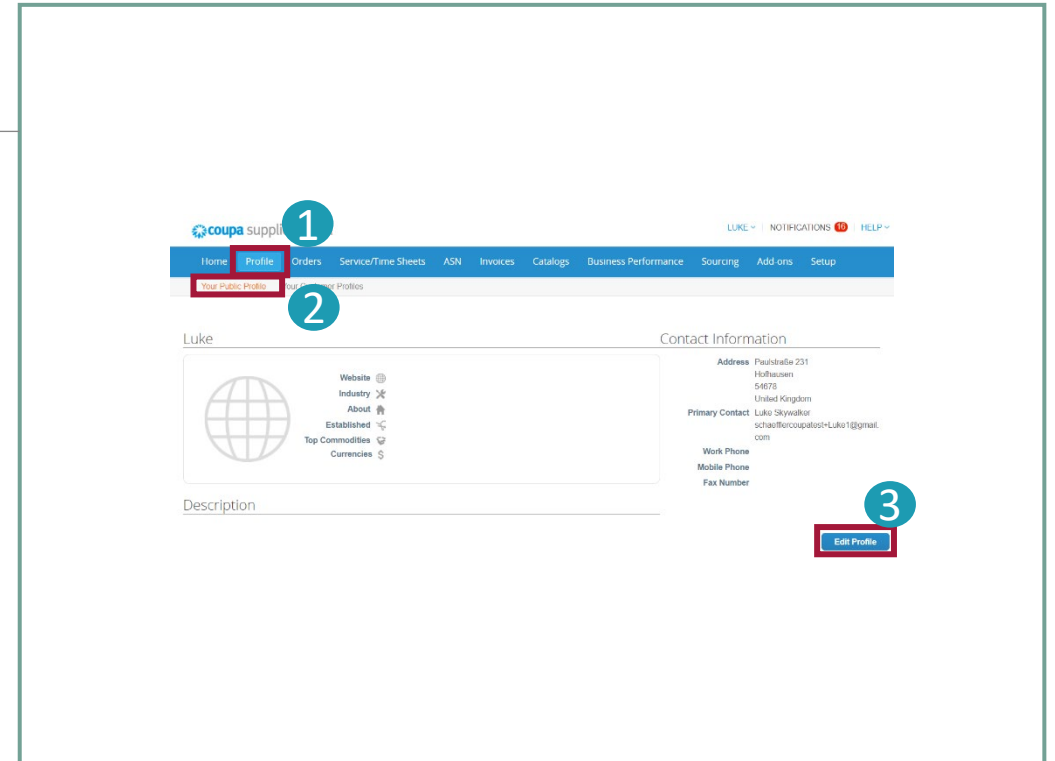


Update your information

If your information, certificates, contact details, etc. change, please let Schaeffler know as soon as possible.

This can be done through the CSP.

- 1 Please click on *“Profile”*.
You can update general information such as **Name, Address & Contact Details** under
- 2 *“Your Public Profile”*.
- 3 Click *“Edit”*.
Once you have updated the information, this will automatically be updated in your customer profiles.



Update your information

Your Schaeffler specific information, certificates, etc. changes, need to be updated under *“Your Customer Profiles”*.

Please click on

- 1 *“Profile”*
- 2 *“Your Customer Profiles”* to update your information.

Once you have updated the information, please click *“Submit for Approval”* to transmit the new information to Schaeffler.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Profile' menu item is highlighted with a red box and a '1' in a blue circle. Below the navigation bar, the 'Your Customer Profiles' link is highlighted with a red box and a '2' in a blue circle. The main content area shows the 'Schaeffler Group' profile page. The 'Supplier information' section includes 'Luke Harrer Ltd' and a message: 'Dear supplier, the company Schaeffler would like to welcome you as a new business partner. For this purpose, we would like to kindly ask you to fill out the following form completely and accurately, as well as to attach requested documents. If you need assistance with translation, please find attached a translation matrix.' The 'Translation Matrix' section includes a link: 'https://www.schaeffler.com/txv'. The 'Company Name' field is filled with 'Luke Harrer Ltd'. At the bottom right, the 'Submit for Approval' button is highlighted with a red box and a '3' in a blue circle. Other buttons include 'Decline' and 'Save'.