

Zendesk Coupa Supplier Information Management (SIM)



zendesk

This training deck should guide you through:

- Receiving your SIM Link via email
- Filling out the SIM Form without signing up for the Coupa Supplier Portal
- Signing up for the Coupa Supplier Portal
- Filling out and submitting your SIM Form from the Portal
- Updating your SIM Profile
- Inactivating and adding your Remit To Information



Receiving your SIM Link via email



Receiving your SIM Link via email

As a supplier doing business with Zendesk, you should've received an email from Coupa to your contact email that you've provided Zendesk with. If you did not receive the email, check your junk folder or contact the Zendesk supplier team at supplier@zendesk.com. Below is the email you should've received:

Hi Supplier,

Zendesk, Inc. wants you to provide/update your profile information for them. It is important that your profile is complete and up to date so your customer has the information they need to transact with you. Get started by registering or logging into the Coupa Supplier Portal (CSP). Once registered, you can:

- Manage your company information
- Configure your PO transmission preferences
- Create an online catalog
- View purchase orders
- Create electronic invoices
- Provide info without registering

Zendesk's preference is for you to register through the CSP, using the SECOND link below. Not registering may delay the onboarding process and will not allow you the self service features mentioned above.

Thanks!

Zendesk, Inc.

Questions: supplier@zendesk.com

Click this link to provide info without registering: https://zendesk-sandbox.coupacloud.com/enter_supplier_information/8138d72c3ea0dbdfb642b324145a633a3a4e87e3

To register on the CSP and complete the requested profile information, please click the link below:

<https://supplier-test.coupacloud.com/signup/8fd533aa01051a127461909b59e95d8982ac3c2b>



Receiving your SIM Link via email

From the email, you are able to provide your information by clicking on the first link without signing up on the Coupa Supplier Portal or clicking on the second link where you can sign up for the Coupa Supplier Portal and easily manage your information from the Portal. Zendesk would prefer that you register to avoid any delays in conducting business.

Hi Supplier,

Zendesk, Inc. wants you to provide/update your profile information for them. It is important that your profile is complete and up to date so your customer has the information they need to transact with you. Get started by registering or logging into the Coupa Supplier Portal (CSP). Once registered, you can:

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Questions: supplier@zendesk.com

Click this link to provide info without registering: https://zendesk-sandbox.coupa.com/enter_supplier_information/8138d72c3ea0d9dfb642b324145a633a3a4e87e3 **1**

To register on the CSP and complete the requested profile information, please click the link below:

<https://supplier-test.coupa.com/signup/8fd533aa01051a127461909b59e95d8982ac3c2b> **2**



Filling out the SIM Form without signing up for the Coupa Supplier Portal



Filling out the SIM Form without signing up for the Coupa Supplier Portal

If you have opted out of signing up for the Coupa Supplier Portal, clicking on the first link will take you directly to the SIM form for you to fill out your information. Depending on which region you service Zendesk in, you will receive the form for that region. Ensure that region is correct. The regions applicable are: **USA**, **EMEA** and **APAC**. Below is what the form will look like.

Hello,

We are looking forward to working with you. In order to set you up for payment and agreement of services, we will need your support to work with our finance and procurement process. For additional resources, please visit the Zendesk Website for more information for suppliers.

Quotes/ Service Orders/ Insertion Orders Terms
We require the following information for all quotes/service orders/ insertion orders:

- Supplier Name and Address
- Zendesk Subsidiary - Bill to and Ship to Address
- Payment Terms - Net 40 days from invoice date
- Zendesk Requestor Name
- Material or Service Description in details
- Quotation Date and Quotation Expiry Date
- Quotation Currency
- Unit Price and Quantity
- Applicable Taxes if any (VAT rate and amount)
- Applicable Freight Costs if any
- Quotation should be in non-editable format like PDF

We cannot accept online or click-through as the governing terms & conditions. Our expectation is to work closely with you to reach mutually agreed conditions via a contractual agreement (i.e. Master Services Agreement, Sales Agreement, etc.)

Supplier Onboarding Form (USA Only)

Company information

Name

Trading Name/DBA

Tax ID

Tax ID Type

Business/Tax Classification Type

****US Tax form W9 or W8 is required. Missing forms will delay onboarding and payment.**

* Tax Form

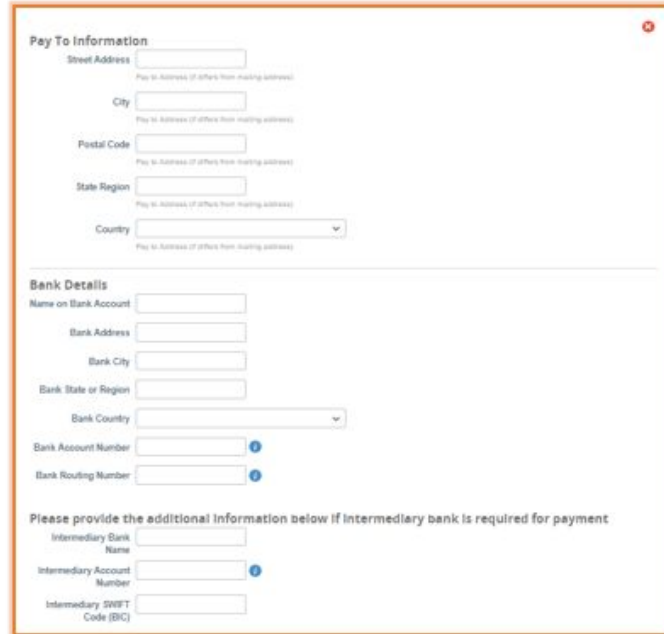
Type

Attachments [Add File](#)



Filling out the SIM Form without signing up for the Coupa Supplier Portal

Proceed to fill out all the applicable fields as you scroll through the form carefully reading the instructions provided on the form. In the Remit-To Address Lines section, click on “**Add**” to add your Remit To information. Missing information in this area will result in payment delays up to 90 days. Upon clicking “**Add**” you will be prompted to fill in your Pay To Information and Bank Details.



The image shows a screenshot of a web form titled "Pay To Information" with a red close button in the top right corner. The form is divided into three main sections:

- Pay To Information:** This section contains six input fields, each with a small instruction below it: "Pay to: Address (if different from mailing address)". The fields are: Street Address, City, Postal Code, State/Region, and Country (a dropdown menu).
- Bank Details:** This section contains six input fields: Name on Bank Account, Bank Address, Bank City, Bank State or Region, Bank Country (a dropdown menu), Bank Account Number, and Bank Routing Number. The last two fields have a blue question mark icon to their right.
- Additional Information:** A heading reads "Please provide the additional information below if intermediary bank is required for payment". Below this are three input fields: Intermediary Bank Name, Intermediary Account Number (with a blue question mark icon), and Intermediary SWIFT Code (BIC).



Filling out the SIM Form without signing up for the Coupa Supplier Portal

Once the form is completely filled out, click on “**Submit**” at the bottom of the form to send the form back to Zendesk. You will be notified that your information has been submitted and is “pending approval”.

Profile: Zendesk, Inc.

Your information has been submitted

Pending Approval

Supplier Information: USA Supplier 5.5

Decline Submit

Q: How long does it take to be set-up as a supplier?
A: If the supplier onboarding form is complete (all mandatory fields are complete and required forms are included) will be delayed if Zendesk receives incomplete data/ forms.

Q: Where should I send my invoice?
A: For suppliers who registered via Coupa Supplier Portal (CSP) you can submit your invoices through the portal or via PDF invoice into an invoice. Invoices submitted via email should always contain PDF format attachments. See "Invoicing" section at the top for where to email PDF copies of invoices.

A valid PO Number must be referenced on invoices, any invoices without a PO Number or exceeding the authorized amount will result in delayed payment.

Please include appropriate information on the first page of invoice such as PO# (Label "PO#"), GL coding / cost center / department, Zendesk Contact Persons or Business owners' information.
(Email submissions are sent to an automated system, so body of emails will not be read for content)

Note: PDF submission Guide
One e-mail submission per one PDF invoice
The PDF must be attached – not an online link for accessing supplier's site
The PDF cannot be password protected
The PDF must allow printing

Q: How do I check on payment status?
A: For suppliers who registered via Coupa Supplier Portal (CSP) you can look this up by logging into the CSP. For those that prefer email, please email all inquiries to apinquiries@zendesk.com

Q: How do I update Company information (e.g. bank account info/ address/ company name)?
A: For any changes – ...

For any company name changes, we will also require a new Tax form. See "Company Information" section for applicable form required.

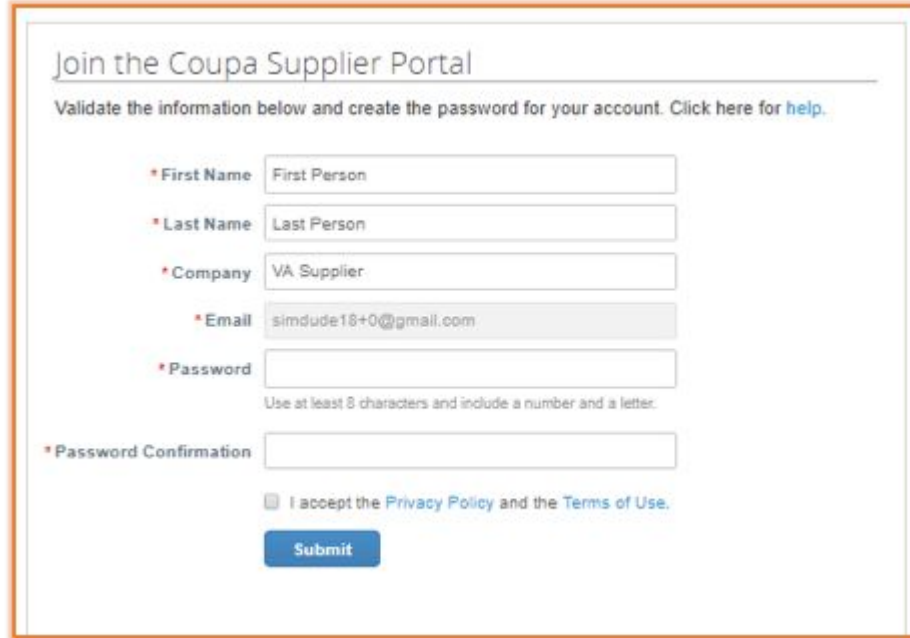


Signing up for the Coupa Supplier Portal



Signing up for the Coupa Supplier Portal

When you click on the second link to sign up, Coupa will prompt you to join the Coupa Supplier Portal by creating an account.



The image shows a web form titled "Join the Coupa Supplier Portal". Below the title is a sub-header: "Validate the information below and create the password for your account. Click here for [help](#)." The form contains several input fields, each with a red asterisk indicating it is required. The fields are: "First Name" (containing "First Person"), "Last Name" (containing "Last Person"), "Company" (containing "VA Supplier"), "Email" (containing "simdude18+0@gmail.com"), "Password" (empty), and "Password Confirmation" (empty). Below the "Password" field is a note: "Use at least 8 characters and include a number and a letter." Below the "Password Confirmation" field is a checkbox with the text "I accept the [Privacy Policy](#) and the [Terms of Use](#)." At the bottom of the form is a blue "Submit" button.

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* 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](#).



Signing up for the Coupa Supplier Portal

If you already have an account in the Coupa Supplier Portal, you will NOT be prompted to create another account. Instead, you will be notified through your email that Zendesk has added you on the Coupa Supplier Portal.

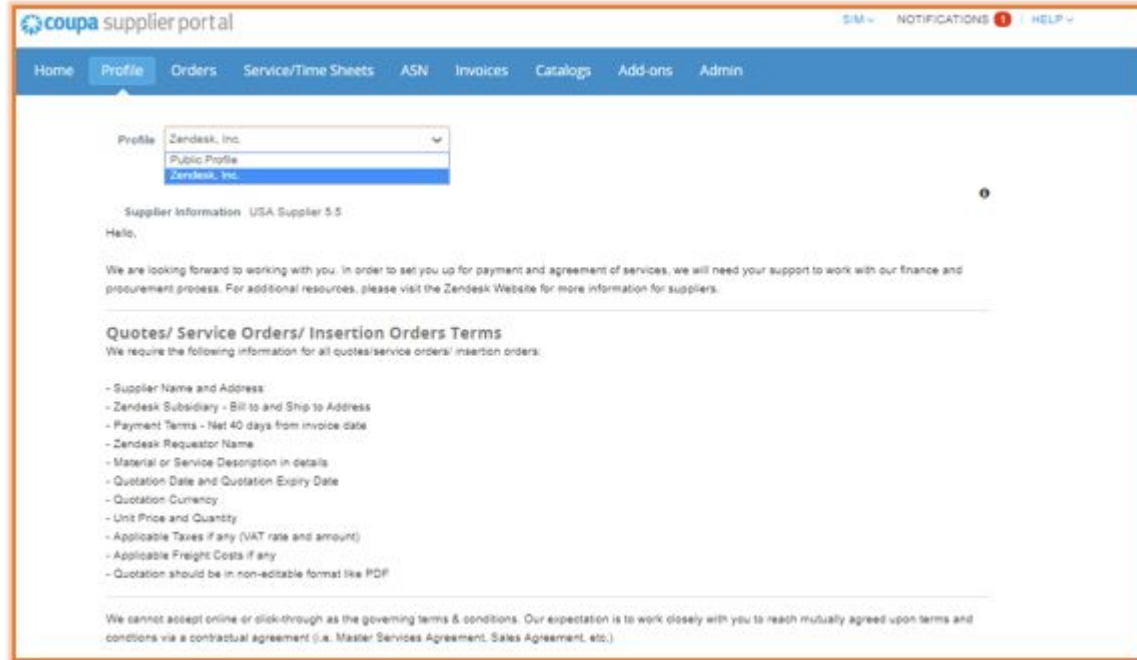


Filling out and submitting SIM Form from the Portal



Filling out and submitting SIM form from the Portal

Once you have signed in to the Coupa Supplier Portal, you will be brought to the Supplier Portal homepage or the form itself. If you are at the homepage, click on “**Profile**”. From the drop down, make sure Zendesk is selected. Fill out the form accordingly.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile (highlighted), Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. In the top right corner, there are links for SIM, NOTIFICATIONS (with a red notification icon), and HELP.

Below the navigation bar, there is a dropdown menu for the Profile. The current selection is "Zendesk, Inc.", and the dropdown menu is open, showing "Public Profile" and "Zendesk, Inc." as options.

Below the dropdown menu, there is a section for "Supplier Information" with the text "USA Supplier 5.5".

Below the "Supplier Information" section, there is a "Hello," greeting.

Below the greeting, there is a paragraph of text: "We are looking forward to working with you. In order to set you up for payment and agreement of services, we will need your support to work with our finance and procurement process. For additional resources, please visit the Zendesk Website for more information for suppliers."

Below the paragraph, there is a section titled "Quotes/ Service Orders/ Insertion Orders Terms".

Below the section title, there is a paragraph of text: "We require the following information for all quotes/service orders/insertion orders:"

- Supplier Name and Address
- Zendesk Subsidiary - Bill to and Ship to Address
- Payment Terms - Net 40 days from invoice date
- Zendesk Requestor Name
- Material or Service Description in details
- Quotation Date and Quotation Expiry Date
- Quotation Currency
- Unit Price and Quantity
- Applicable Taxes if any (VAT rate and amount)
- Applicable Freight Costs if any
- Quotation should be in non-editable format like PDF

Below the list, there is a paragraph of text: "We cannot accept online or click-through as the governing terms & conditions. Our expectation is to work closely with you to reach mutually agreed upon terms and conditions via a contractual agreement (i.e. Master Services Agreement, Sales Agreement, etc.)"



Filling out and submitting SIM form from the Portal

Depending on which region you service Zendesk in, you will receive the form for that region. Ensure that region is correct. The regions applicable are: **USA**, **EMEA** and **APAC**.

Hello,

We are looking forward to working with you. In order to set you up for payment and agreement of services, we will need your support to work with our finance and procurement process. For additional resources, please visit the Zendesk Website for more information for suppliers.

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- Quotation Currency
- Unit Price and Quantity
- Applicable Taxes if any (VAT rate and amount)
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Supplier Onboarding Form (USA Only)

Company Information

Name

Trading Name/DBA

Tax ID

Tax ID Type

Business/Tax Classification Type

****US Tax form W9 or W8 is required. Missing forms will delay onboarding and payment.**

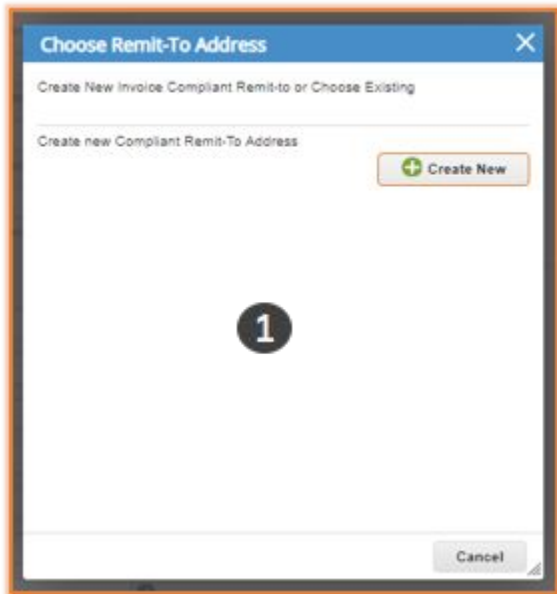
* Tax Form

Attachments [Add File](#)

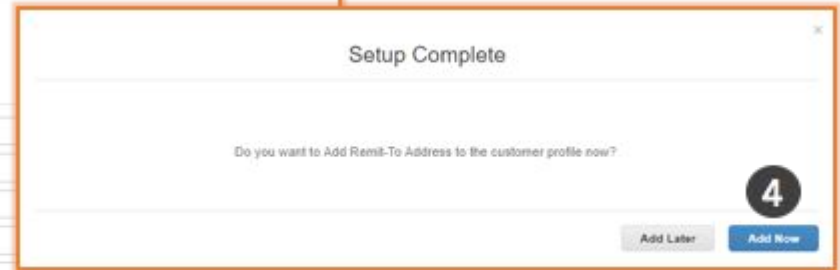


Filling out and submitting SIM form from the Portal

Proceed to fill out all the applicable fields as you scroll through the form carefully reading the instructions provided on the form. In the Remit-To Address Lines section, click on **“Add”** to add your Remit To information. Missing information in this area will result in payment delays up to 90 days. Upon clicking **“Add”** you will be prompted to create a new Remit-To Address if you do not have an existing one. Click on **“Done”** once you have completed it. Select **“Add Now”** to continue adding the rest of the Remit-To information.



This screenshot shows a form titled "Tell your customers about your organization". The first section is "What address do you invoice from?" with a large black circle containing the number "2" overlaid on it. This section includes input fields for "Address Line 1", "Address Line 2", "City", "State", and "Postal Code", and a dropdown menu for "Country" set to "United States". Below these fields are two checkboxes: "Use this address for Remit-To" and "Use this for Ship From address". The second section is "What is your Tax ID?" with a large black circle containing the number "3" overlaid on it. It includes a "Country" dropdown set to "United States", a "Tax ID" input field, and a checkbox labeled "I don't have a VAT/GST Number". A "Cancel" button is at the bottom left of this section.



Filling out and submitting SIM form from the Portal

Proceed to fill in your Pay To Information and Bank Details. If the information you entered is inaccurate, click on the x and re-add the Remit-To address.

Remit-To Address Lines

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To-Address.

Pay To Information ✖

Street Address:
Pay to Address (if differs from mailing address)

City:
Pay to Address (if differs from mailing address)

Postal Code:
Pay to Address (if differs from mailing address)

State/Region:
Pay to Address (if differs from mailing address)

Country:
Pay to Address (if differs from mailing address)

Bank Details

Name on Bank Account:

Bank Address:

Bank City:

Bank State or Region:

Bank Country:

Bank Account Number: ⓘ

Bank Routing Number: ⓘ

Please provide the additional information below if intermediary bank is required for payment

Intermediary Bank Name:

Intermediary Account Number: ⓘ

Intermediary SWIFT Code (BIC):



Filling out and submitting SIM form from the Portal

Once the form is completely filled out, click on “**Submit**” at the bottom of the form to send the form back to Zendesk. You will be notified that your information has been submitted and is “pending approval”.

The screenshot displays a web interface for submitting a Supplier Information form. At the top, a dropdown menu shows the profile as 'Zendesk, Inc.'. A prominent green notification bar states 'Your information has been submitted' with a close button (X). Below this, the status is 'Pending Approval' with a help icon. The form title is 'Supplier Information USA Supplier 5.5'. At the bottom, there are two buttons: 'Decline' and 'Submit'. The background shows a FAQ section with questions and answers regarding invoice submission and company information updates.

Q: How long does it take to be set-up as a supplier?
A: If the supplier onboarding form is complete (all mandatory fields are complete and required forms are included), it will take... will be delayed if Zendesk receives incomplete data/ forms.

Q: Where should I send my invoice?
A: For suppliers who registered via Coupa Supplier Portal (CSP) you can submit your invoices through the portal or flip a PO... submitted via email should always contain PDF format attachments. See "Invoicing" section at the top for where to email PDF...

A valid PO Number must be referenced on invoices, any invoices without a PO Number or exceeding the authorized amount will result in delayed payment.

Please include appropriate information on the first page of invoice such as PO# (Label "PO#"), GL coding / cost center / department, Zendesk Contact Persons or Business owners' information.
(Email submissions are sent to an automated system, so body of emails will not be read for content)

Note: PDF submission Guide
One e-mail submission per one PDF invoice
The PDF must be attached – not an online link for accessing supplier's site
The PDF cannot be password protected
The PDF must allow printing

Q: How do I check on payment status?
A: For suppliers who registered via Coupa Supplier Portal (CSP) you can look this up by logging into the CSP. For those that prefer email, please email all inquiries to apinquiries@zendesk.com

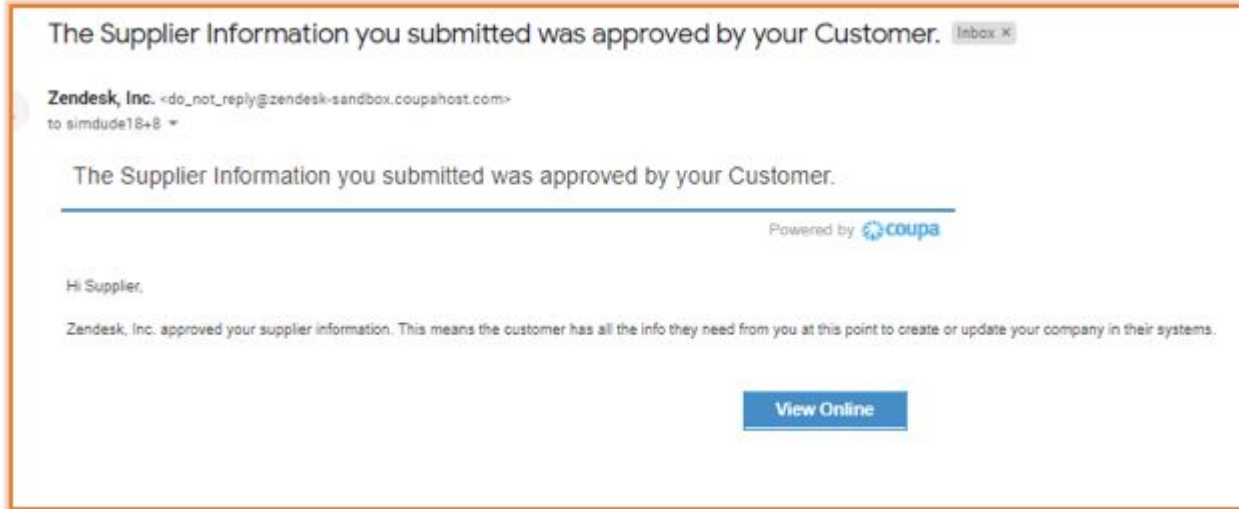
Q: How do I update Company information (e.g. bank account info/ address/ company name)?
A: For any changes – ...

For any company name changes, we will also require a new Tax form. See "Company Information" section for applicable form required

Decline Submit

Filling out and submitting SIM form from the Portal

Once your form is approved by Zendesk, you will be notified through your email.



Updating your SIM Profile



Updating your SIM Profile

From the “Applied” form, you are able to update your information as necessary by clicking on “Update Info” and updating the fields you need. This is only possible from the Coupa Supplier Portal if you have signed up. Once completed, “Submit for Approval”.

Profile:

Applied

Supplier Information: USA Supplier 5.5

Hello,

We are looking forward to working with you. In order to set you up for payment and agreement of services, we will need your support to work with our finance and procurement process. For additional resources, please visit the Zendesk Website for more information for suppliers.

Quotes/ Service Orders/ Insertion Orders Terms
We require the following information for all quotes/service orders/ insertion orders:

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- Applicable Freight Costs if any
- Quotation should be in non-editable format like PDF

spnquotes@zendesk.com

Q: How do I update Company information (e.g. bank account info/ address/ company name)?
A: For any changes – ...

For any company name changes, we will also require a new Tax form. See "Company Information" section for applicable form required

1 Update Info

2 Decline Save Submit for Approval



Inactivating and adding your Remit To Information




Inactivating and adding your Remit To Information

During the update process in your SIM profile, you can also inactivate your **existing** Remit-To information that you have created. In the Remit-To section, toggle the **Active field** area to “**Inactive**”. Select “**Add**” to add another remit-to address as needed. Once completed, submit the entire form for approval. Remit To cannot be submitted individually.

Please provide the additional information below if intermediary bank is required for payment

Intermediary Bank Name

Intermediary Account Number 

Intermediary SWIFT Code (BIC)

Active active" if you want to inactivate the existing Remit To Information)

Remit-To Address Lines

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Pay To Information



Questions?

Please contact the Zendesk Procurement Team at supplier@zendesk.com



zendesk