Zendesk Coupa Supplier Information Management (SIM)

zendesk

Agenda

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 you 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

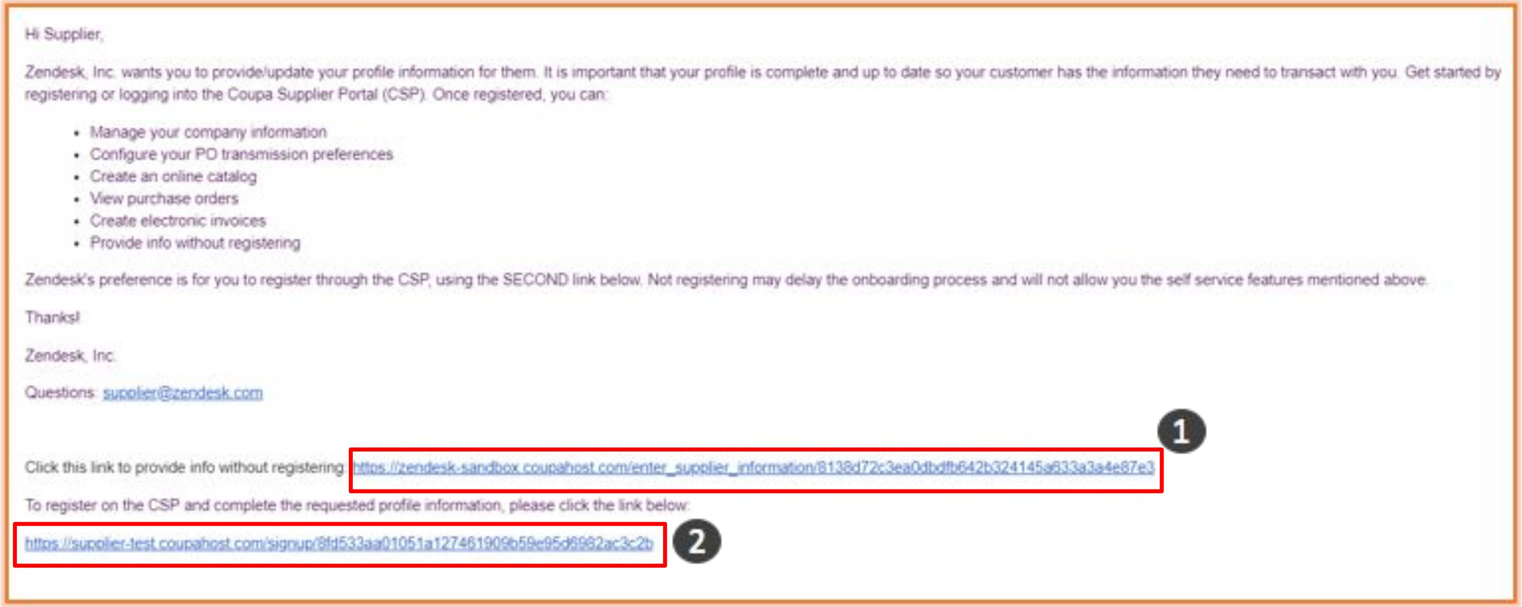
Click this link to provide info without registering: https://zendesk-sandbox.coupahost.com/enter_supplier_information/8138d72c3ea0dbdfb642b324145a633a3a4e87e3

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

https://supplier-test.coupahost.com/signup/8fd533aa01051a127461909b59e95d6982ac3c2b

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.



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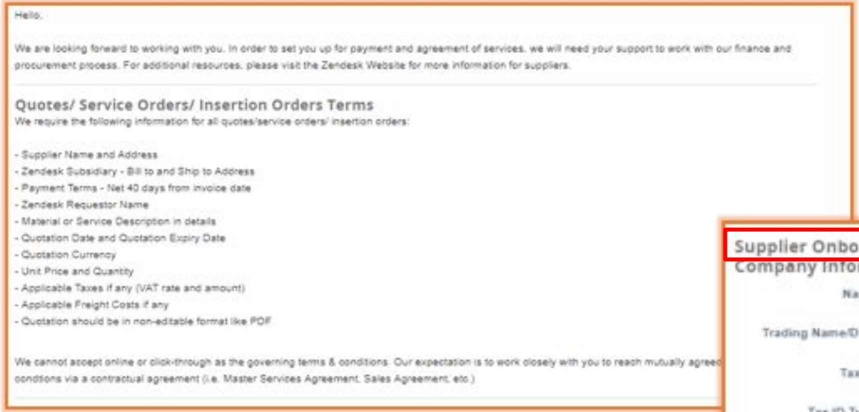
Filling out the SIM Form <u>without</u> signing up for the Coupa Supplier Portal

Filling out the SIM Form <u>without</u> 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,

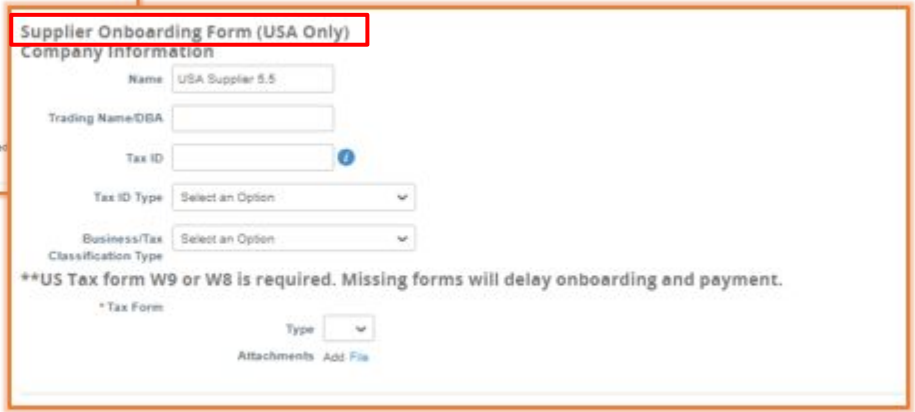
We are looking forward to working with you. In order to set you up for payment and agreement of services, we will need your support to work with our finance and procurement process. For additional resources, please visit the Zendesk Website for more information for suppliers.

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 agree
condtions via a contractual agreement (i.e. Master Services Agreement, Sales Agreement, etc.)



Supplier Onboarding Form (USA Only)

Company Information

Name: USA Supplier 5.5

Trading Name/DBA

Tax ID

Tax ID Type: Select an Option

Business/Tax Classification Type: Select an Option

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

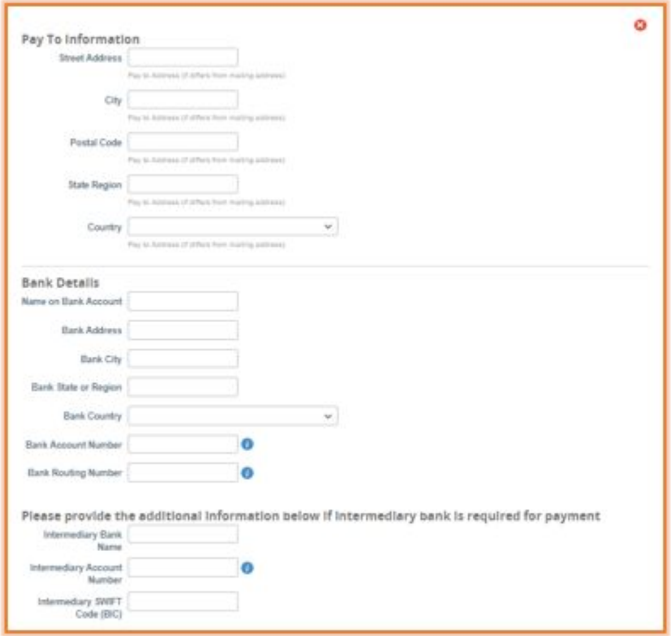
* Tax Form

Type

Attachments: Add File

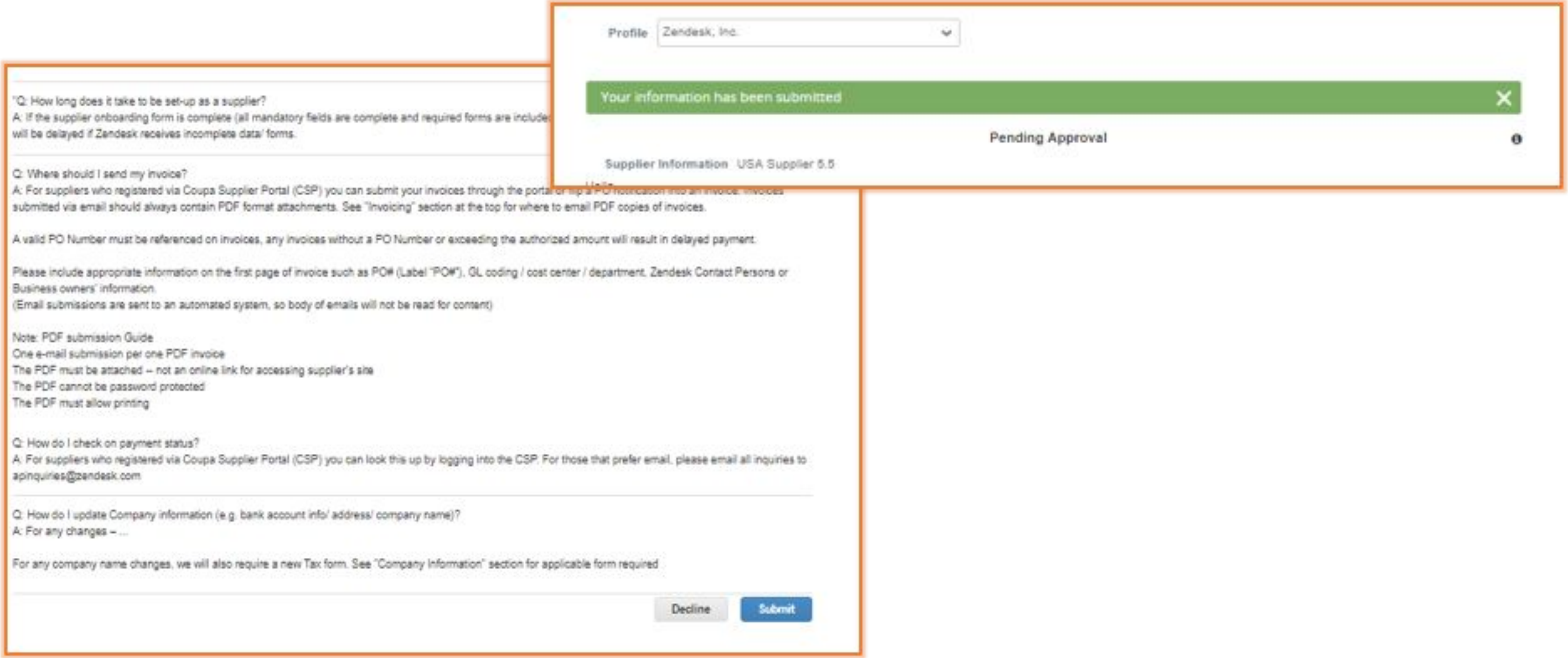
Filling out the SIM Form <u>without</u> signing up for the Coupa Supplier Portal

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.



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

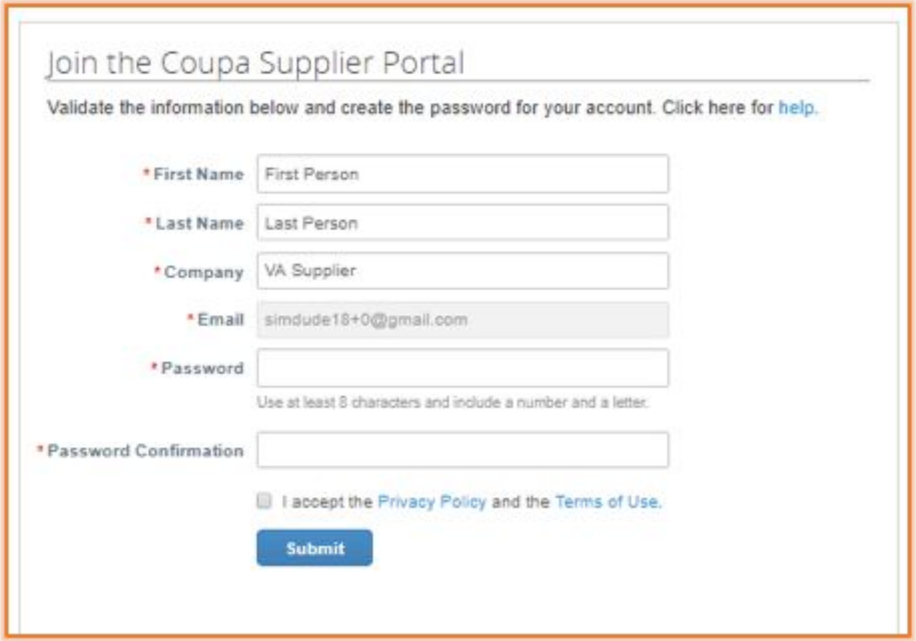
Once the form is completely filled out, click on "**Submit**" at the bottom of the form to send the form back to Zendesk. You will be notified that your information has been submitted and is "pending approval".



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.



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.

Your customer has been added to the Coupa Supplier Portal Inbox

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to me

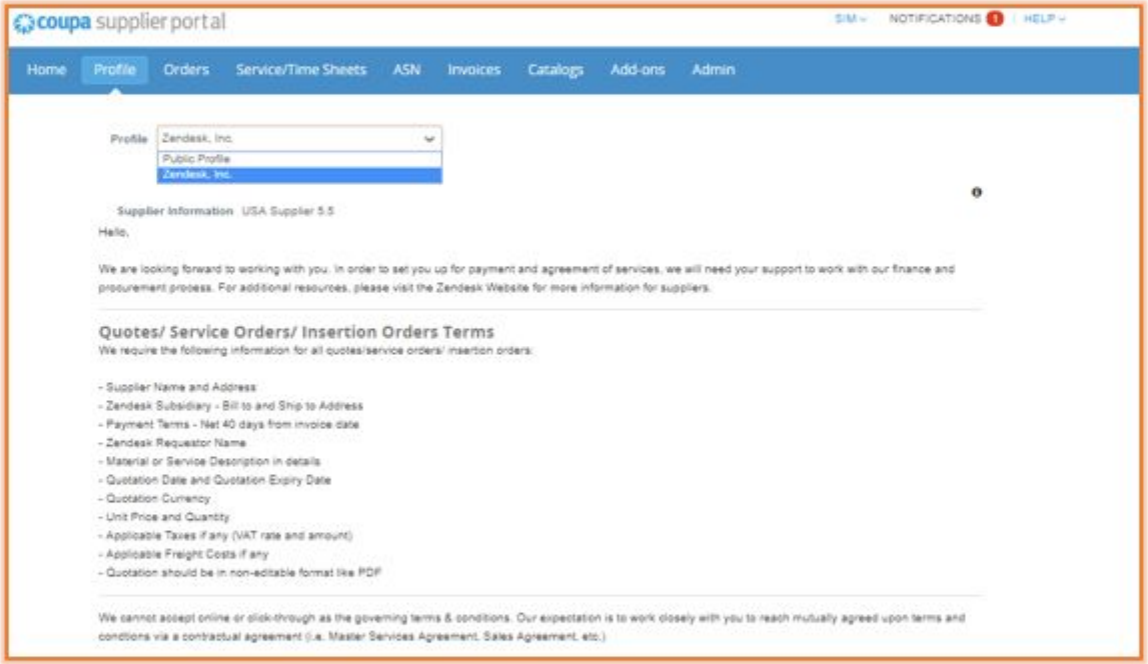
Congratulations! Zendesk, Inc. has added you as a supplier on the Coupa Supplier Portal. Click here to sign in so you can:

- Configure your PO transmission preferences
- Create an online catalog
- View purchase orders
- Create electronic invoices

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.



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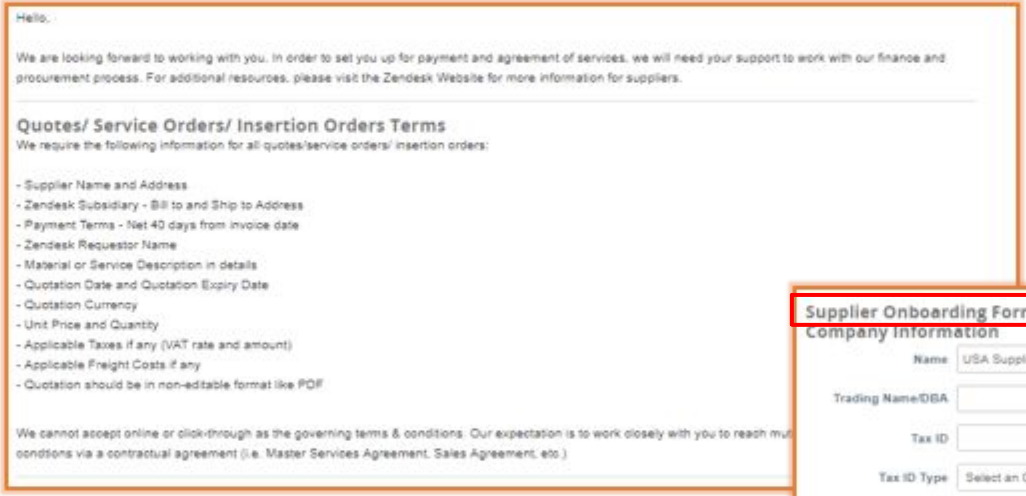

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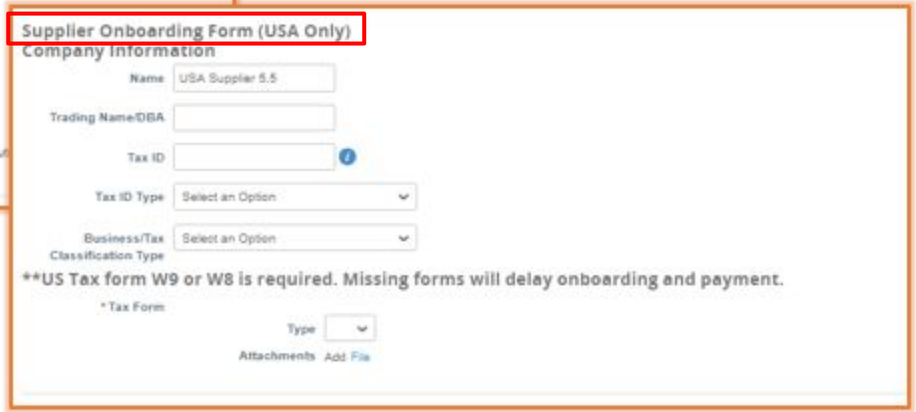

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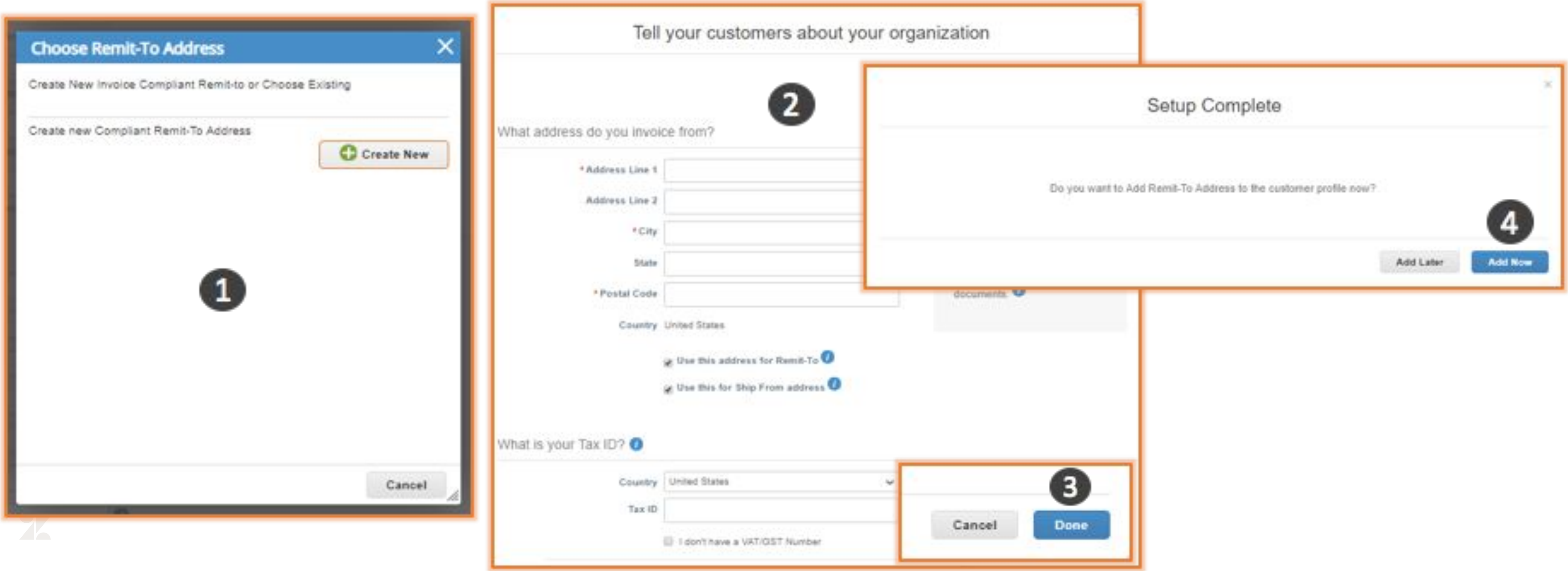
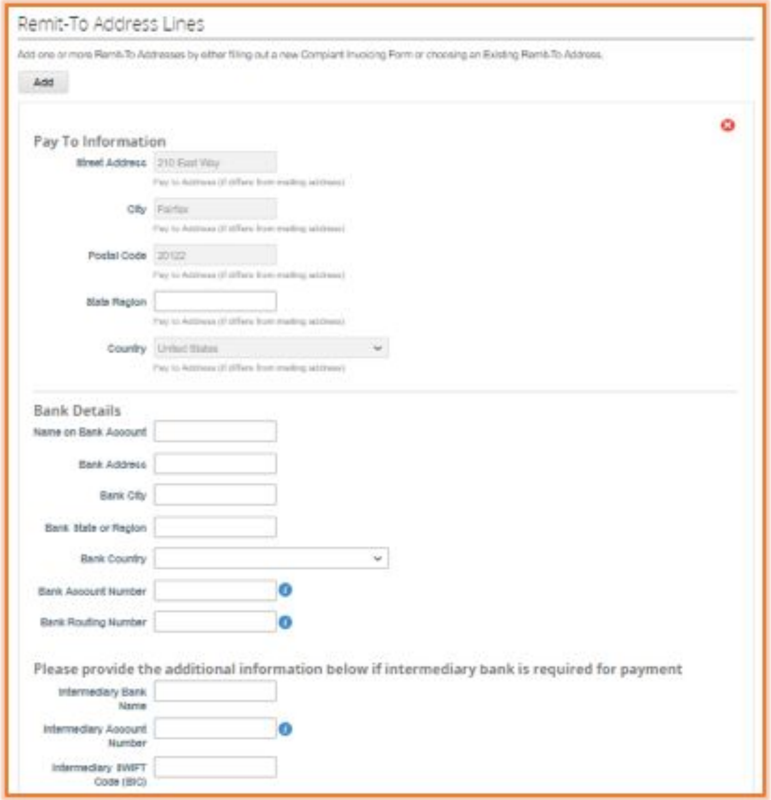


Filling out and submitting SIM form from the Portal

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.



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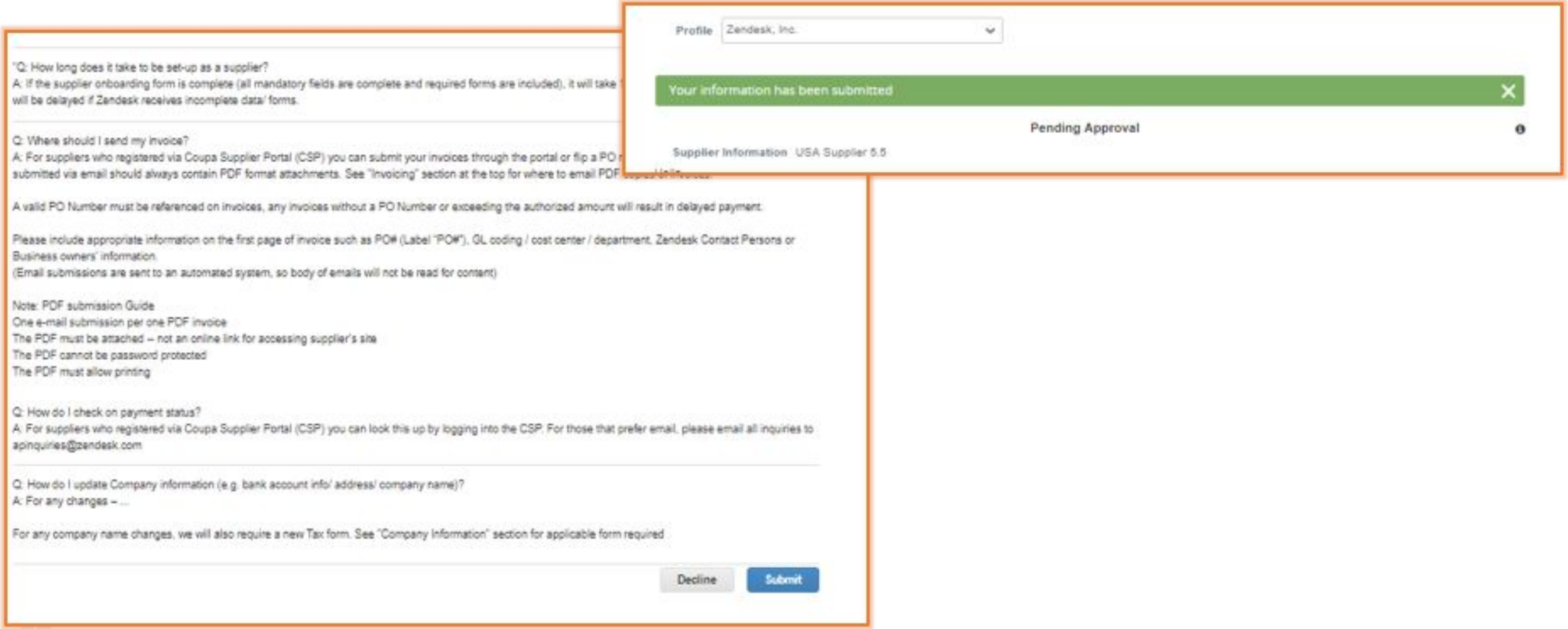
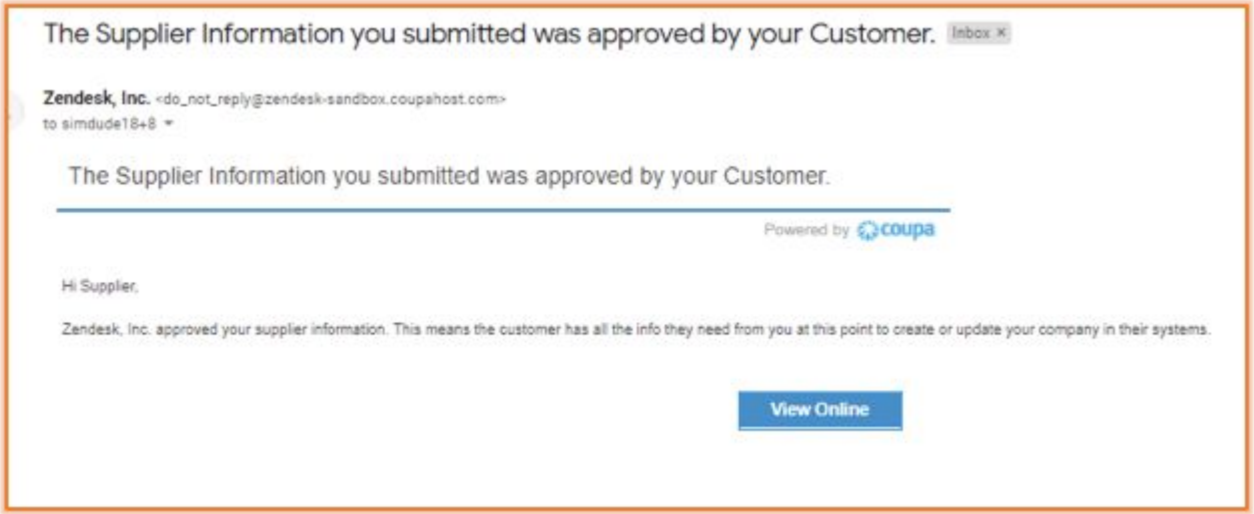


Filling out and submitting SIM form from the Portal

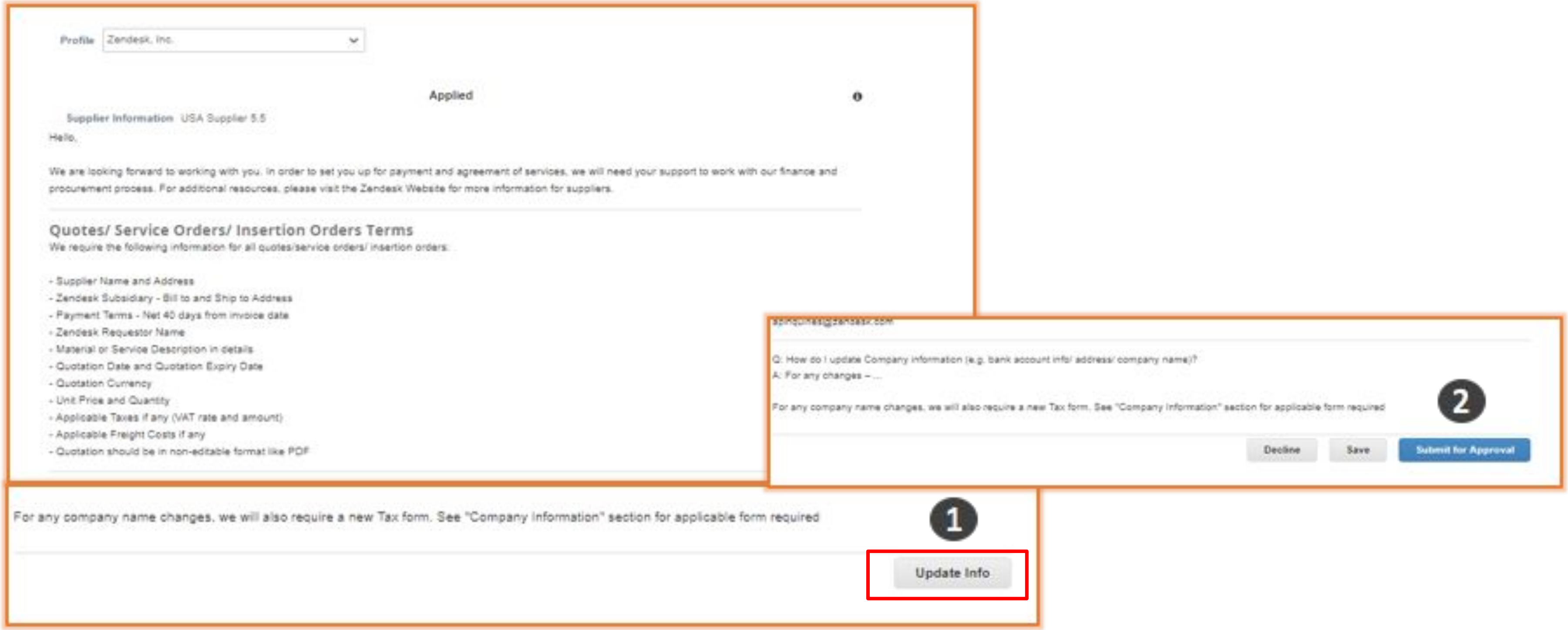
Once your form is approved by Zendesk, you will be notified through your email.



Updating your SIM Profile

Updating your SIM Profile

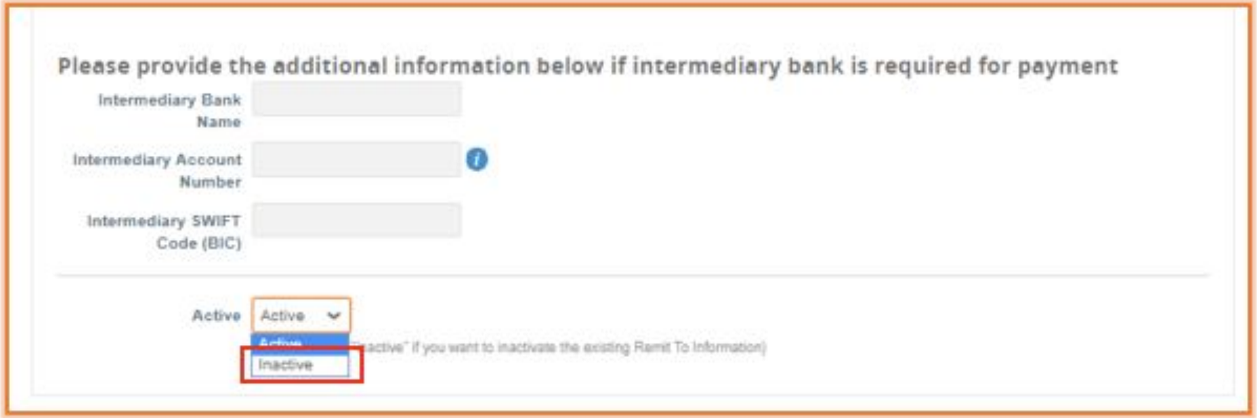
From the “Applied” form, you are able to update your information as necessary by clicking on “Update Info” and updating the fields you need. This is only possible from the Coupa Supplier Portal if you have signed up. Once completed, “Submit for Approval”.



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.



Questions?

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