

# HashiCorp Supplier Guide

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# Certa

Certa is HashiCorp's centralized system for security/privacy reviews and supplier onboarding. When a HashiCorp employee wishes to onboard a new supplier they will start the process in Certa.

## Logging into Certa

To log in, you would have received an email invitation to Certa that looks like the below.



Dear Elvis,

It's our pleasure to welcome you to Certa - HashiCorp's vendor onboarding portal.

We are in the process of evaluating you as a vendor. As part of this process we will need to gather some information from you which may include:

- General Company Information
- Tax and Banking Information
- Security and Privacy - related information (if applicable)

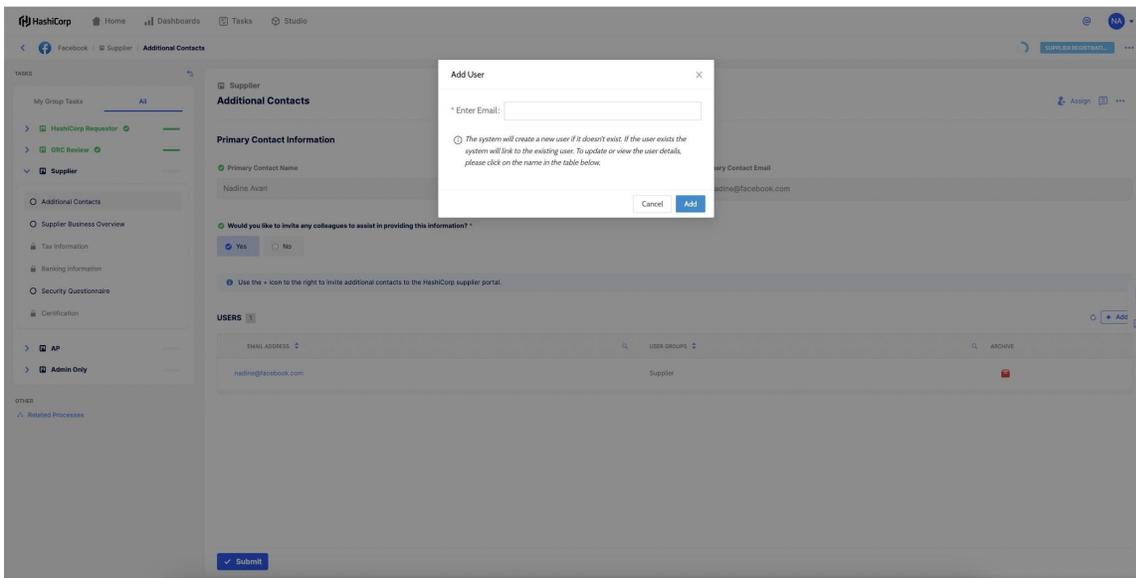
Please use the following link to navigate to the portal:

<https://hashicorp.certa.site/process/880/>

Enter your email on the portal to generate a secure one-time password that will be sent to your inbox. This code will last for 5 hours. Use the code to login to your account.

HashiCorp Team

By clicking the link embedded within the email and then entering your email address in the portal, a One Time Password (OTP) will be generated and sent to your inbox. Using the OTP will open the Certa screen. At this point you will be able to invite additional colleagues (e.g., Accounting or Security Teams) to assist in providing necessary information. A similar onboarding email will be sent to their emails.



## Supplier Business Overview

Next you will be prompted to fill out the Supplier Business overview page. Some of these answers will already be populated based on the information previously entered by the HashiCorp employee who initiated the process. You will have the ability to verify this information or override those answers.

The screenshot shows the 'Supplier Business Overview' form in the HashiCorp system. The form is titled 'Supplier Business Overview' and includes a 'Supplier Information' section. The form is populated with the following information:

- Supplier Legal Entity Name:** Facebook
- Supplier DBA Name:** Facebook
- Supplier Country:** United States
- Which HashiCorp entity are you working with?:** US
- Accounts Receivable - Email Address:** nad@getcerta.com
- Remit to Address:**
  - Country/Region:** United States
  - State:** California
  - Street Address:** 20824 Pamela Way
  - Street Address 2:**
  - City:**
  - Postal Code:**

The form includes a 'Submit' button at the bottom left.

## Tax Information

Based on the country selected on the Supplier Business Overview page Certa will ask for your company's tax information. For example, all suppliers working with the HashiCorp US entity will be asked to provide a W8 or W9 form.

For all U.S.-based suppliers, Certa will validate that the EIN provided matches the registered company name via an integration with the IRS. If there is a mismatch, this step will automatically be unsubmitted. You will receive an email notification asking to review and verify the information.

The screenshot shows the 'Tax Information' form in the HashiCorp system. The form is titled 'Tax Information' and includes the following information:

- Federal Tax ID (e.g., SSN, EIN):** 083919223
- Suppliers are required to provide a completed W9 or W8 attachment if you are doing business with HashiCorp, Inc., a business registered in the U.S.**
  - W9 - U.S.-based Vendor working with HashiCorp, Inc.
  - W8 - International (Non-U.S.) Vendor working with HashiCorp, Inc.
- Please download the W9 document from this link here**
- Upload the completed and duly signed W9 document below**
- W9/W8\_Sample.docx**
- We were unable to validate your tax identifier within our database. Please re-enter your Tax ID and confirm that the information provided above is correct.**
- I confirm that the tax identifier, entity name and other details that I have provided are correct.**
- Yes**  **No**

The form includes a 'Submit' button at the bottom left.

## Banking Information

This step will vary based on the region the supplier is located in. Certa will verify the information is in the correct format (E.g., checking for a routing number of 9 digits for U.S.-based suppliers). If Certa attempts to validate the information and fails, the step will automatically be unsubmitted. You will receive an email notification asking to review and verify the information.

The screenshot shows the HashiCorp Supplier Banking Information form. The form is titled "Banking Information" and is part of a "Supplier" profile. It contains two main sections: "Bank Detail" and "Bank Address".

**Bank Detail:**

- Bank Name: Silicon Valley Bank
- Payment Currency: USD
- Bank Account Number: 1233299293
- Bank Routing Number: 334463938

A red box highlights a validation error message: "We were unable to validate your banking details within our database. Please re-enter your bank account number and/or routing number and confirm that the information provided above is correct." Below the message is a confirmation checkbox: "I confirm that the account number, routing number and other details that I have provided are correct." with "Yes" selected.

**Bank Address:**

- Bank Country/Region: United States
- Bank State or Region: California
- Bank Street Address: 3005 Tasman Dr
- Bank City: Santa Clara
- Bank Postal Code: (empty)

A "Submit" button is located at the bottom of the form.

## Privacy/Security Questionnaires

If the services you provide to HashiCorp involves (1) storing, processing or hosting Hashicorp or its' customers' data, or (2) integrations with our products / services, you will be asked to provide responses to additional questions around Privacy and Security.

## Certification

The last step in the Certa onboarding process is the Certification page. On this page the supplier will certify that all information submitted is true and accurate. Once this page is submitted the information previously filled out will route for review to the appropriate internal teams. Any questions on the Certa process can be directed to [grc@hashicorp.com](mailto:grc@hashicorp.com).

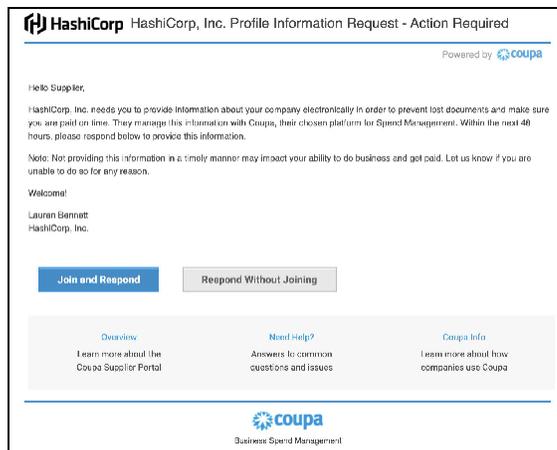
# Coupa

Coupa is HashiCorp’s purchase order and payment system. We request all of our suppliers to create an account to receive purchase orders, submit invoices and to check payment status.

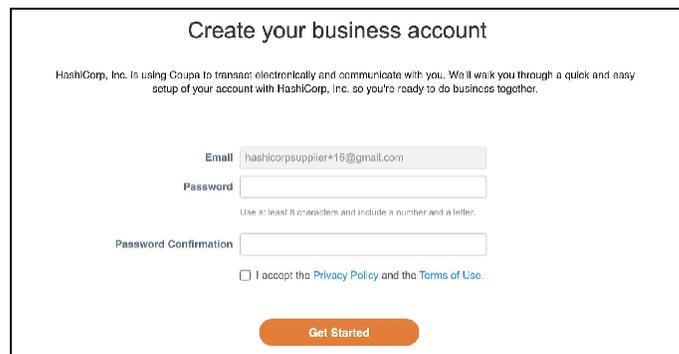
## Creating an Account



To begin, you should have gotten an email that looks like this:



Step 1: Click “Join and Respond”. After clicking “Join and Respond”, you will be directed to a webpage that looks like this:

A form titled "Create your business account". It contains fields for "Email" (pre-filled with "hashicorpsupplier+16@gmail.com"), "Password", and "Password Confirmation". Below the password fields is a checkbox for "I accept the Privacy Policy and the Terms of Use." and a "Get Started" button.

Step 2: Create and confirm a password for your Coupa account.

Step 3: Click on “I accept the Privacy Policy and the Terms of Use” and then click “Get

Started”

Step 4: You will be directed to a screen asking for basic company information. Please fill out and double check for accuracy. After double-checking, click “next” in the bottom right corner.

The screenshot shows a web form titled "Tell us about your business" with a progress indicator at the top showing "Basics" as the active step. The form contains the following fields and options:

- Company Name:** HashiCorp Test (with a note: "Your official registered company name")
- Website:** hashicorp.com
- Country/Region:** United States (dropdown menu)
- Address Line 1:** 101 2nd St #700
- Address Line 2:** (empty)
- City:** San Francisco
- State:** CA
- Postal Code:** 94105

Below the address fields, there are three checked checkboxes under the heading "Also use this address as":

- Invoice from location (Note: "Must match your official registered company address")
- Pay to location (Remit-To)
- Ship from location

At the bottom, there is an unchecked checkbox for "Advanced invoicing" with the text: "We support integration for invoicing (cXML or SFTP) and plan to use it with HashiCorp, Inc."

A "Next" button is located in the bottom right corner.

Step 5: Choose your preferences on the following screen and click “next” when done

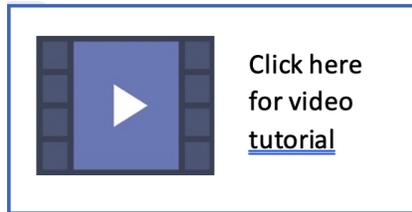
The screenshot shows a web form titled "Would you like to offer discounts to get paid faster?" with a progress indicator at the top showing "Payment" as the active step. The form is titled "Payment Discount Preferences" and contains the following sections:

- Your default payment term:** A list of terms with right-pointing arrows: Net 30, Net 45, Net 60, Net 75, Net 90, and Net 120.
- Automatically replace with this discount (you can change this later):** A list of dropdown menus, each currently set to "None".

At the bottom, there is an unchecked checkbox with the text: "Use these preferences for all your customers".

A "Next" button is located in the bottom right corner.

## Submitting PO Backed Invoices



Step 1: Click on the “orders” tab on the navigation bar. It should look like this:

Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Invoice from a Purchase Order

View: All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
US-0000064	12/11/20	Issued	None	IT purchase	No	1,000.00 USD		
US-0000055	12/09/20	Issued	None	Non-Services purchase	No	1,000.00 USD		
US-0000054	12/09/20	Issued	None	non-IT purchase	No	1,000.00 USD		
US-0000044	12/08/20	Soft Closed	None	1 Each of etfdd	No	2,000.00 USD		
US-0000040	12/07/20	Issued	None	Test	No	10,000.00 USD		
US-0000039	12/04/20	Issued	None	1 Bag of Sample IT item	No	20,000.00 USD		
US-0000031	12/04/20	Closed	None	Buy on behalf of	No	20,000.00 USD		
US-0000027	12/03/20	Issued	None	Test	No	900.00 USD		

Step 2: Click into whichever PO you would like to invoice. Double check that it is the correct purchase order.

Purchase Order #US-0000064

Status: Issued - Pending Manual

Order Date: 12/11/20

Revision Date: 12/11/20

Requester: Werner Schwock

Email: x-werner@hashicorp.com

Payment Term: Net 60

Attachments: None

Acknowledged:

Assigned to:

Shipping

Ship-To Address: 101 2nd St.  
Suite 700  
San Francisco, CA 94105  
United States  
Location Code: 1  
Attn: Reinhard Schwock

Terms: None

Shipment Tracking  Add

No shipment tracking.

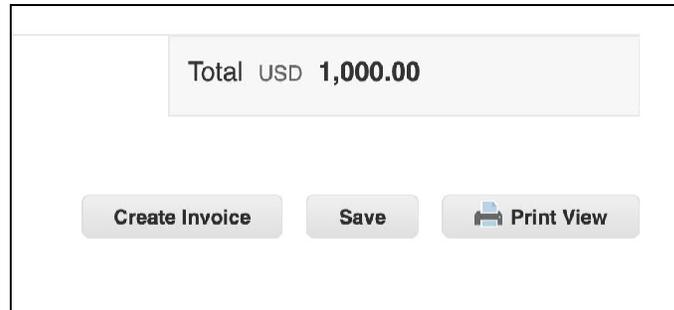
Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Price	Total	Invoiced
	IT purchase	1,000.00	1,000.00	0.00

Part Number: None  
Manufacturer Name: None  
Manufacturer Part Number: None  
Start Date: 12/09/20  
End Date: 12/10/20

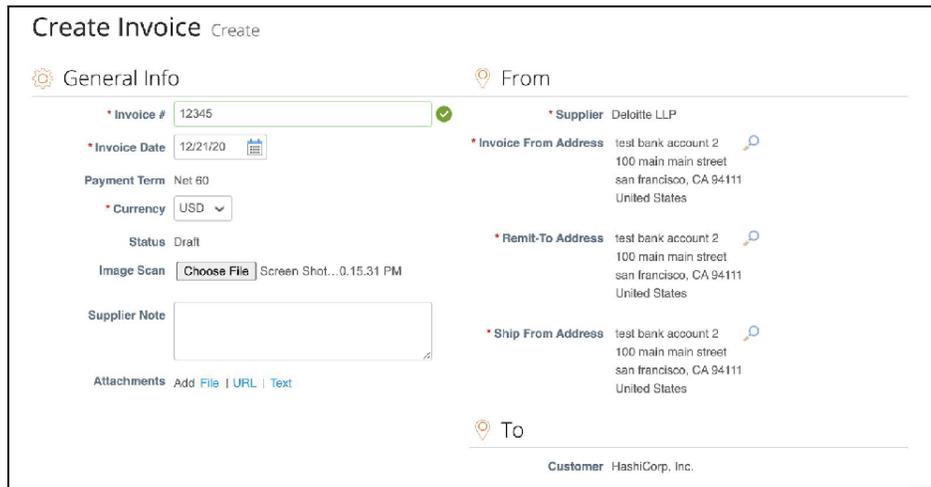
Step 3: Scroll down and click on “Create Invoice”



Total USD **1,000.00**

[Create Invoice](#) [Save](#) [Print View](#)

Step 4: Enter the invoice number, invoice date, and currency. Then upload a picture of the invoice through Image Scan using the “Choose File” button. Then scroll down and click on “Submit” and then click on “Send Invoice”.



**Create Invoice** Create

**General Info**

- \* Invoice #: 12345 ✓
- \* Invoice Date: 12/21/20
- Payment Term: Net 60
- \* Currency: USD
- Status: Draft
- Image Scan: [Choose File](#) Screen Shot...0.15.31 PM
- Supplier Note:
- Attachments: [Add File](#) | [URL](#) | [Text](#)

**From**

- \* Supplier: Deloitte LLP
- \* Invoice From Address: test bank account 2  
100 main main street  
san francisco, CA 94111  
United States
- \* Remit-To Address: test bank account 2  
100 main main street  
san francisco, CA 94111  
United States
- \* Ship From Address: test bank account 2  
100 main main street  
san francisco, CA 94111  
United States

**To**

**Customer** HashiCorp, Inc.

Step 5: Scroll down and review the items being invoiced, the invoice amount, and make any edits if needed.

Type	Description	Price
	IT purchase	1,000.00

PO Line: US-0000064-1

Contract:

Supplier Part Number:

Billing: 1-8-8454

Line Level Taxation

Step 6: Enter any tax, handling, shipping, or other expenses. When done, click on "Submit" and then click on "Send Invoice".

Totals & Taxes

Lines Net Total: 1,000.00

Shipping:

Tax:  % 0.000

Tax Reference:

Handling:

Tax:  % 0.000

Tax Reference:

Misc:

Tax:  % 0.000

Tax Reference:

Tax:  0.00 % 0.000

Total Tax: 0.00

Net Total: 1,000.00

**Total: 1,000.00**

## Submitting Non-PO Backed Invoices

Step 1: Click on the “invoices” tab on the navigation bar.

Step 2: Click on “Create Blank Invoice”.

Step 3: Enter the invoice number, invoice date, payment terms, and currency. Then upload a picture of the invoice through Image Scan using the “Choose File” button.

### Create Invoice Create

---

#### General Info

\* Invoice #  ✓

\* Invoice Date

Payment Term

\* Currency

Status

Image Scan  No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

#### From

\* Supplier

\* Invoice From Address   
100 main main street  
san francisco, CA 94111  
United States

\* Remit-To Address   
100 main main street  
san francisco, CA 94111  
United States

\* Ship From Address   
100 main main street  
san francisco, CA 94111  
United States

#### To

Customer

Requester Email

Requester Name

Step 4: Next, scroll down and fill out the following form. If needed, click on “Add Line” to add additional items/services.

### Lines Line Level Taxation

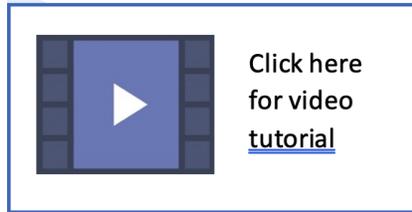
Type	Description	Qty	UOM	Price	
<input type="text" value="Qty"/>	<input type="text" value="Things"/>	<input type="text" value="1.000"/>	<input type="text" value="Bag"/>	<input type="text" value="10,000.00"/>	10,000.00
PO Line		Contract		Supplier Part Number	
None		<input type="text"/>		<input type="text"/>	

[+ Add Line](#) Totals & Taxes

Step 5: Enter any tax, handling, shipping, or other expenses. When done, click on "Submit" and then click on "Send Invoice".

Totals & Taxes	
Lines Net Total	1,000.00
<hr/>	
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Handling	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Tax	<input type="text"/> 0.00 % <input type="text"/> 0.000
<hr/>	
Total Tax	0.00
Net Total	1,000.00
<b>Total</b>	<b>1,000.00</b>

## Check Payment Status



Step 1: Click on the “invoices” tab on the navigation bar.

Step 2: Click on the drop-down menu next to “View”.

Instructions From Customer  
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices ⓘ

Create Invoice from PO   Create Invoice from Contract   Create Blank Invoice   Create Credit Note

Export to   View All   Search

Step 3: Select “Payment Information”.

Invoices

Instructions From Customer  
{Example text - this is set on your Company Information setup page and will be displayed for CSP and S

Create Invoices ⓘ

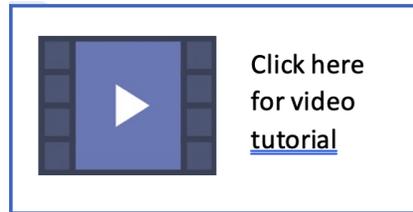
Create Invoice from PO   Create Invoice from Contract   Create Blank Invoice   Cr

Export to   View ✓ Payment Information   Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment	Information
No	None	1234	Pending Approval	12/21/20	Net 60	
No	None	None	Draft	12/21/20	None	
No	US-0000064	None	Draft	12/21/20	Net 60	12/21/20
No	US-0000064	None	Draft	12/21/20	Net 60	12/21/20
No	US-0000064	None	Draft	12/21/20	Net 60	12/21/20
No	US-0000064	None	Draft	12/21/20	Net 60	12/21/20
No	US-0000064	None	Draft	12/20/20	Net 60	12/20/20

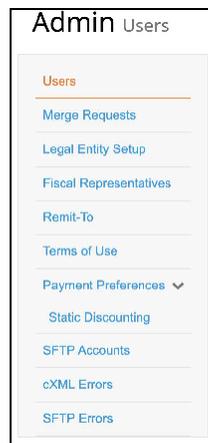
- All
- Abandoned
- Approved
- Credit Notes
- Disputed
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Overdue invoices
- ✓ Payment Information
- Pending Approval
- Processing
- Unpaid invoices
- Voided
- Create View

## Add a New User



Step 1: Click on the “Setup” tab on the navigation bar.

Step 2: Click on “Users” on the menu on the left-hand side of the screen.



Step 3: Click on “Invite User” on the right side of the screen.

Step 4: Fill out form and click “Send Invitation”

## Getting Help

Refer to <https://www.hashicorp.com/suppliers> for instructions and FAQ's on how to do business with HashiCorp.

Email [procurement@hashicorp.com](mailto:procurement@hashicorp.com) for any questions to do with Coupa.