

# HashiCorp Supplier Guide

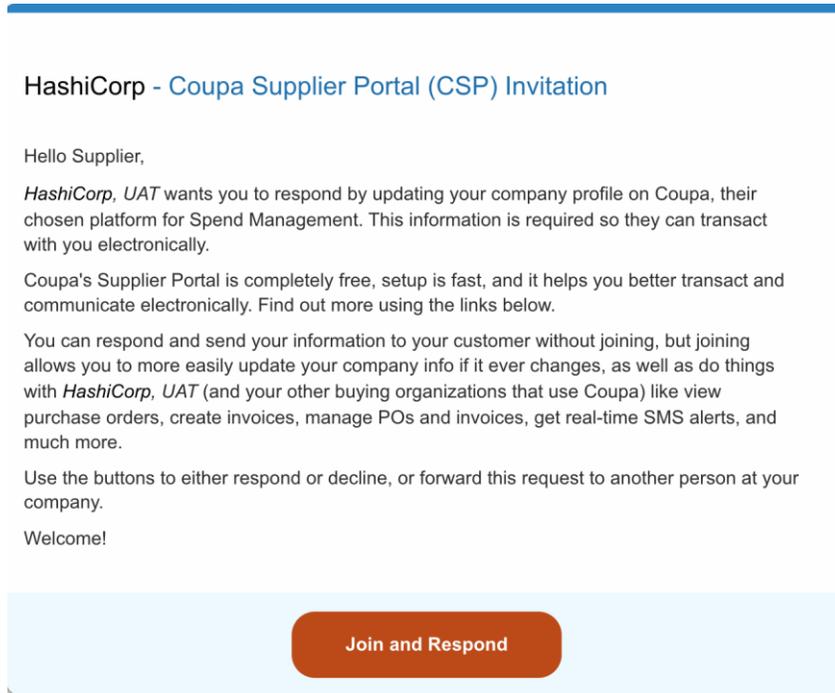
<b>Coupa</b>	<b>2</b>
Creating an Account	2
Submitting PO Backed Invoices	7
Submitting Non-PO Backed Invoices	10
Check Payment Status	12
Add a New User	13
Getting Help	14

# Coupa

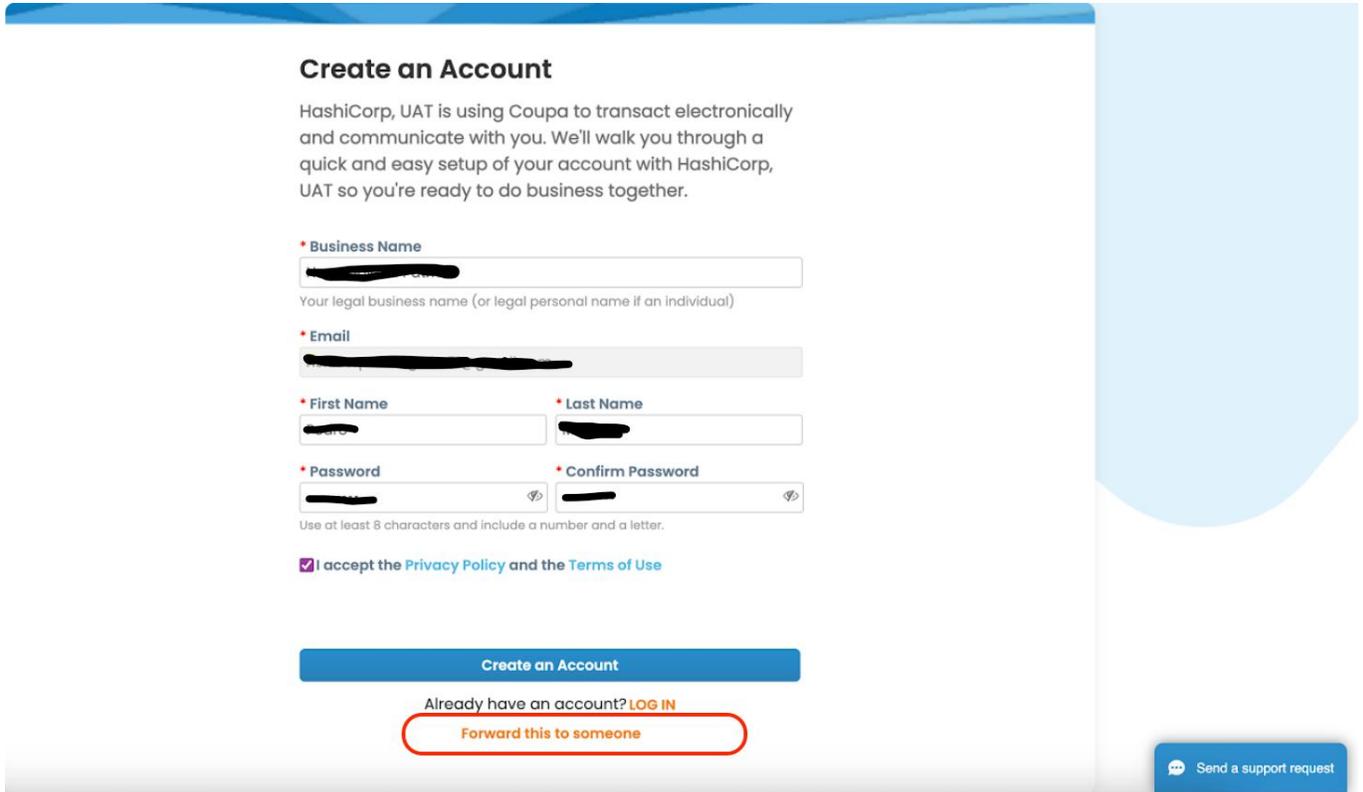
Coupa is HashiCorp’s purchase order and payment system. All new suppliers at HashiCorp will need to go through the Coupa SIM onboarding process. We request all our suppliers create an account to receive purchase orders, submit invoices and to check payment status.

## [Creating an Account](#)

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



Note: You can forward the invite to someone else in your email domain by opening the invite and clicking “Forward this to someone (refer to the screenshot below).”



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

### Create an Account

HashiCorp, UAT is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with HashiCorp, UAT so you're ready to do business together.

**\* Business Name**  
Test Supplier  
Your legal business name (or legal personal name if an individual)

**\* Email**  
vic.lodato+41@protonmail.com

**\* First Name**      **\* Last Name**  
Test                      Supplier

**\* Password**      **\* Confirm Password**  
[Redacted]              [Redacted]

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

I accept the [Privacy Policy](#) and the [Terms of Use](#)

**Create an Account**

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 setup two factor authentication. Once this is complete hit ‘Next’.

Step 5: After entering some basic information on your company a page will say ‘HashiCorp requires some additional information.’ Click on ‘Take Me There’.

Step 6: Complete all required fields, starting with Primary Address Information.

Step 7: In the next section you’ll add your company’s Tax Information. Select the Add Tax Registration button to start this process. Fill out the information required based on your country and attach your company’s Tax Form/Certificate.

### • Tax Registrations

Use this section to add all your applicable tax registrations.

[Add Tax Registration](#)

### • Tax Registration

Country ✖

Number

Local

### • Supplier Country

Make sure the Supplier Country is the same as the Tax Registration Country selected.

### • Tax Form/Certificate

[Choose File](#) No file chosen

Make sure the Supplier Country is the same as the Tax Registration Country selected. The tax certificate, also referred to as tax registration certificate, issued by local tax authority. For example W9/V9 in the US and VAT Registration certification in European countries.

Step 8: For Remittance and Bank Information select if you use a US bank or a Non-US bank. Then hit the Add Remit-To button to setup your remittance. The last step is to attach a bank form verifying ownership of your business' official bank account. You'll then check the box to certify all information provided is correct and submit the Form for approval to HashiCorp.

### Remittance and Bank information

### • Bank Country

- US Bank  
 Non US Bank

### • 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](#)

### • Payment Currency

### • Bank Form

#### • Attachments

[Add File](#)

Document issued by your bank providing information about your business' official bank account.

• By submitting an application to become a HashiCorp approved Vendor, I certify that I have the authority to bind the company named in the application and certify that all information submitted is true and accurate.

[Decline](#)

[Save](#)

[Submit for Approval](#)

Step 9: Congratulations! You have completed your Coupa Supplier account set up request and

will be notified by HashiCorp, Inc. after your profile has been approved. Your notification will look like this:

 **HashiCorp** Profile Info submitted to HashiCorp, Inc. was Approved

---

Powered by 

Hi John,

The company profile information that you submitted to your customer, HashiCorp, Inc. was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

[View Profile Info](#)

---



## 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@hashcorp.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 

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

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

Total USD **1,000.00**

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. Scroll down and click on “Submit” and then “Send Invoice”.

Create Invoice [Create](#)

**General Info**

\* Invoice #  ✓

\* Invoice Date

Payment Term

\* Currency

Status

Image Scan  Screen Shot...0.15.31 PM

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

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

Type	Description	Price
	IT purchase	1,000.00

PO Line: US-0000064-1

Contract:

Supplier Part Number:

Billing: 1-8-8454

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 navigationbar.

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.

The screenshot shows the 'Create Invoice' form with the following fields and values:

- General Info:**
  - Invoice #: 1234
  - Invoice Date: 12/21/20
  - Payment Term: Net 60
  - Currency: USD
  - Status: Draft
  - Image Scan: Choose File (No file chosen)
  - Supplier Note: (empty)
  - 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.
  - Requester Email: (empty)
  - Requester Name: (empty)

Step 4: Next, scroll down and fill out the form.

The screenshot shows the 'Lines' section of the invoice form with the following details:

Type	Description	Qty	UOM	Price	
Qty	Things	1.000	Bag	10,000.00	10,000.00

Below the table, there are fields for:

- PO Line: None
- Contract: (empty)
- Supplier Part Number: (empty)

At the bottom, there is an 'Add Line' button and a 'Totals & Taxes' section.

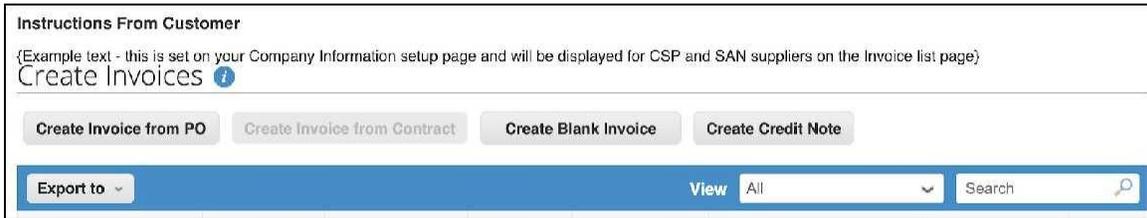
Step 5: Enter any tax, handling, shipping, or other expenses. When done, click on “Submit” and then click on “Send Invoice”.

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>

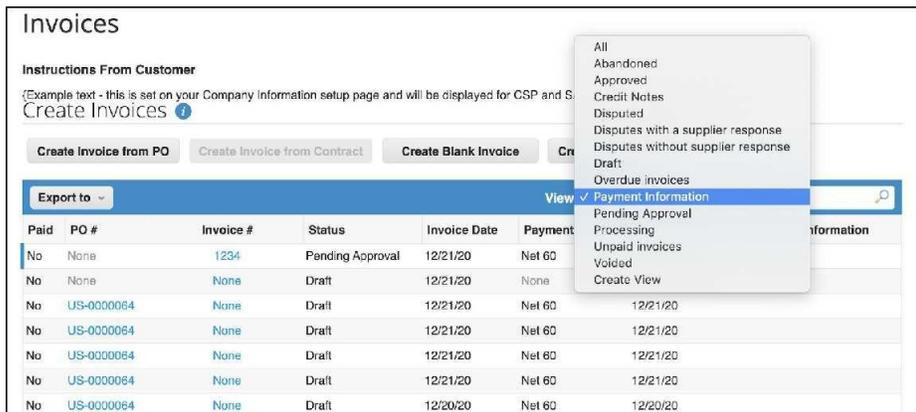
## Check Payment Status

Step 1: Click on the “Invoices” tab on the navigationbar.

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



Step 3: Select “Payment Information.”



## 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 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.