

HashiCorp Supplier Guide

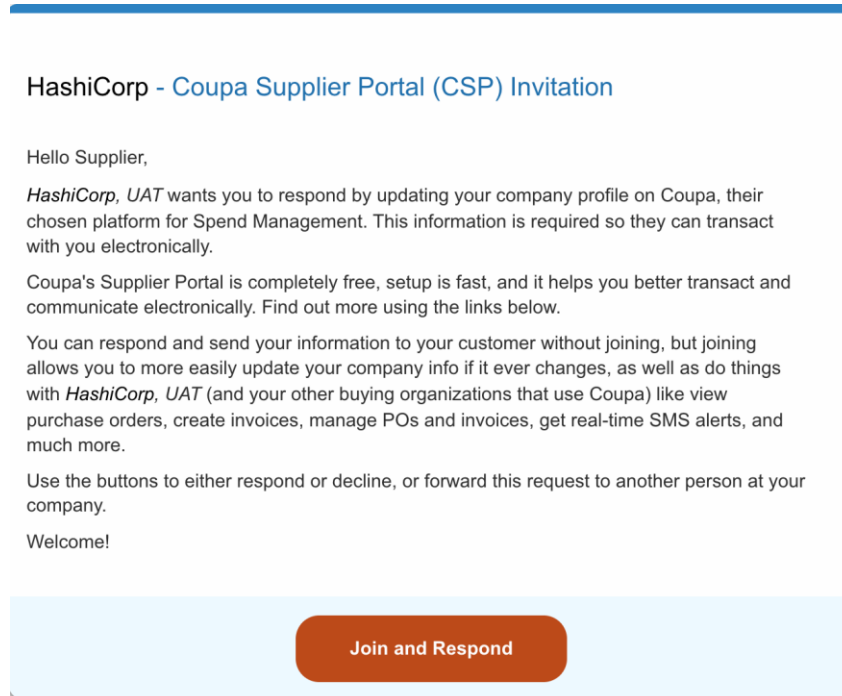
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Coupa

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)."

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

 Your legal business name (or legal personal name if an individual)

* Email

* First Name * Last Name

* Password * Confirm Password

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

Already have an account? [LOG IN](#)

[Forward this to someone](#)

[Send a support request](#)

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

 Your legal business name (or legal personal name if an individual)

* Email

* First Name * Last Name

* Password * Confirm Password

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

United States

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/VAT 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

Select

• 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

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

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

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

Create Invoice [Create](#)

General Info

* Invoice #12345

* Invoice Date12/21/20

Payment TermNet 60

* CurrencyUSD

StatusDraft

Image Scan

Choose File

Screen Shot...0.15.31 PM

Supplier Note

AttachmentsAdd [File](#) | [URL](#) | [Text](#)

From

* SupplierDeloitte LLP

* Invoice From Addresstest bank account 2
100 main main street
san francisco, CA 94111
United States

* Remit-To Addresstest bank account 2
100 main main street
san francisco, CA 94111
United States

* Ship From Addresstest bank account 2
100 main main street
san francisco, CA 94111
United States

To

CustomerHashiCorp, Inc.

8

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

Lines

☐ Line Level Taxation

Type	Description	Price	
	IT purchase	1,000.00	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

Enter a tax reason description.

Handling

Tax

%

0.000

Tax Reference

Enter a tax reason description.

Misc

Tax

%

0.000

Tax Reference

Enter a tax reason description.

Tax

0.00

%

0.000

Total Tax

0.00

Net Total

1,000.00

Total

1,000.00

delete

Cancel

Save as Draft

Calculate

Submit

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.

Create Invoice Create

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

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

Requester Name

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

Lines

☐ Line Level Taxation

Type	Description	Qty	UOM	Price	
Qty	Things	1.000	Bag	10,000.00	10,000.00
PO Line	Contract	Supplier Part Number			
None					

[+ 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 Total1,000.00

Shipping

Tax

%

0.000

Tax Reference

Enter a tax reason description.

Handling

Tax

%

0.000

Tax Reference

Enter a tax reason description.

Misc

Tax

%

0.000

Tax Reference

Enter a tax reason description.

Tax

0.00

%

0.000

Total Tax0.00

Net Total1,000.00

Total1,000.00

Delete

Cancel

Save as Draft

Calculate

Submit

Check Payment Status

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

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

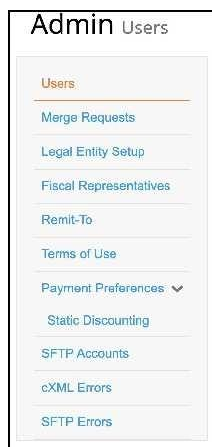
Export to View ✓ Payment Information
Abandoned
Approved
Credit Notes
Disputed
Disputes with a supplier response
Disputes without supplier response
Draft
Overdue invoices
Pending Approval
Processing
Unpaid invoices
Voided
Create View

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

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 for any questions to do with Coupa.