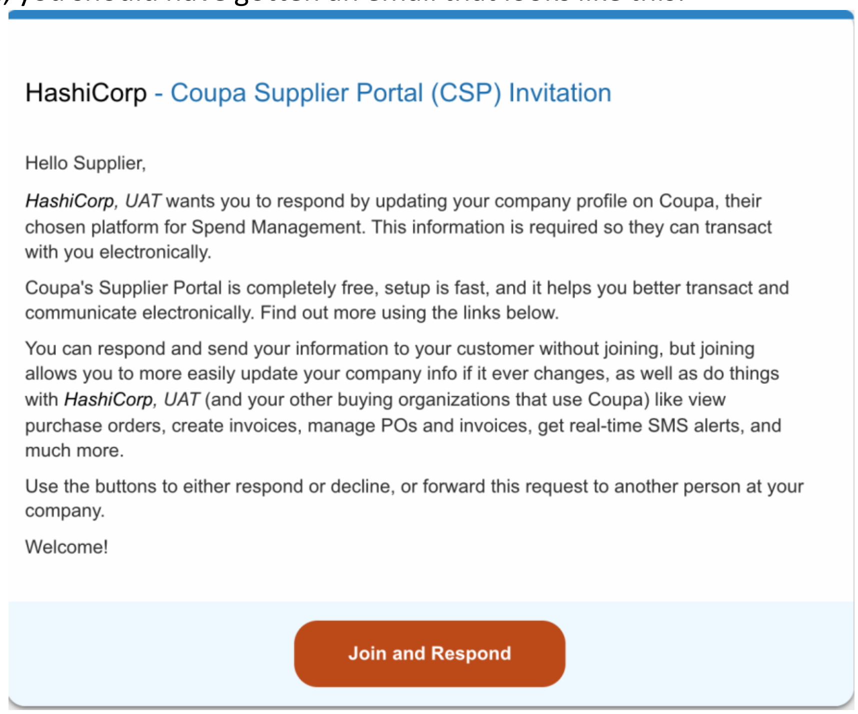
HashiCorp Supplier Guide

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:



HashiCorp - Coupa Supplier Portal (CSP) Invitation

Hello Supplier,

HashiCorp, UAT wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically. Find out more using the links below.

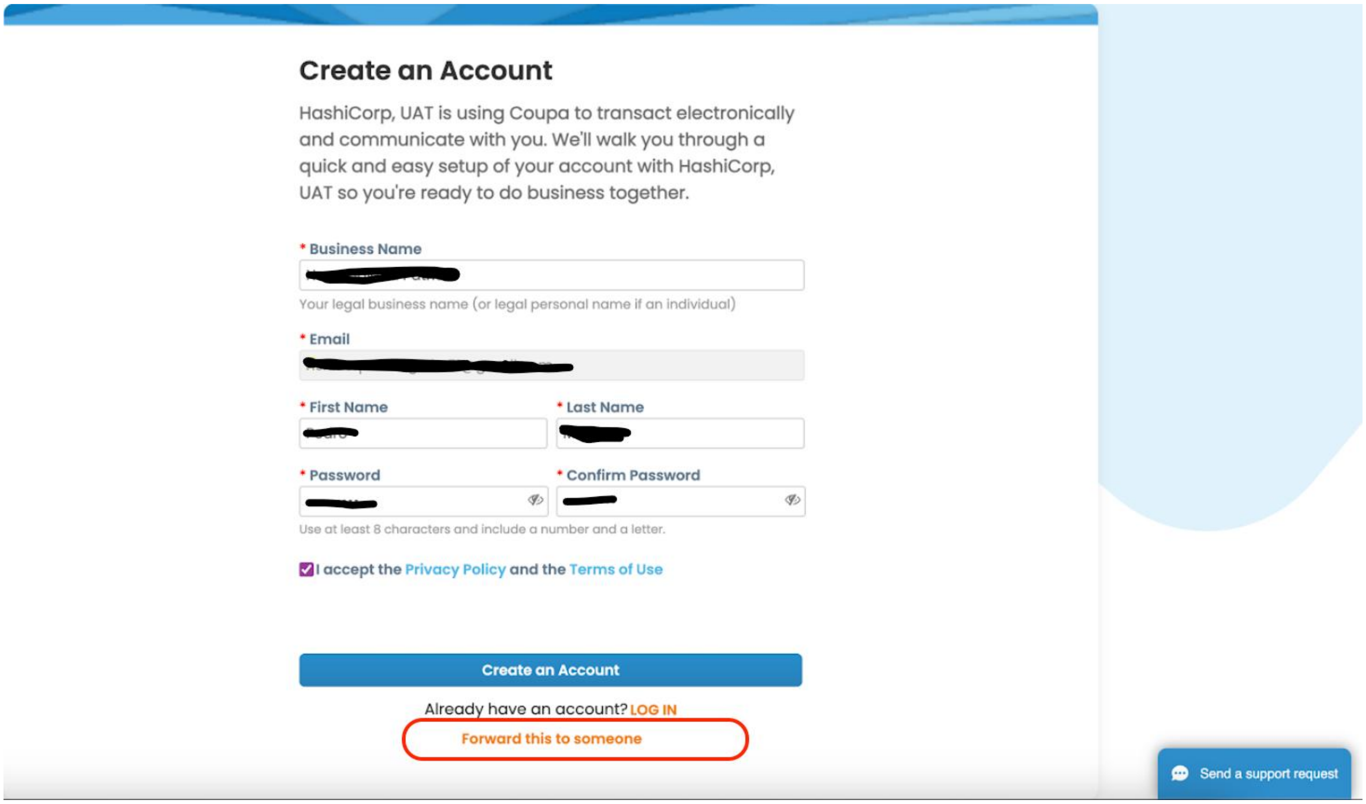
You can respond and send your information to your customer without joining, but joining allows you to more easily update your company info if it ever changes, as well as do things with *HashiCorp, UAT* (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Use the buttons to either respond or decline, or forward this request to another person at your company.

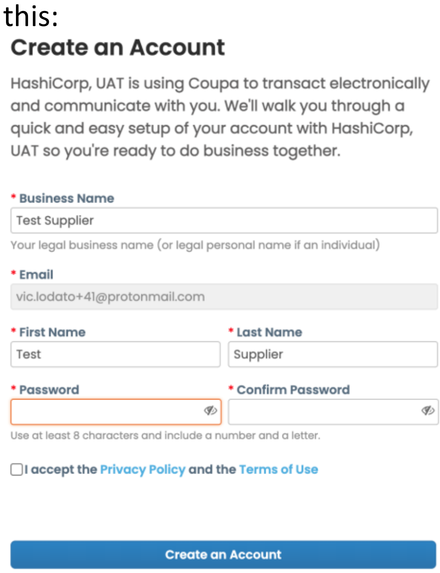
Welcome!

Join and Respond

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).



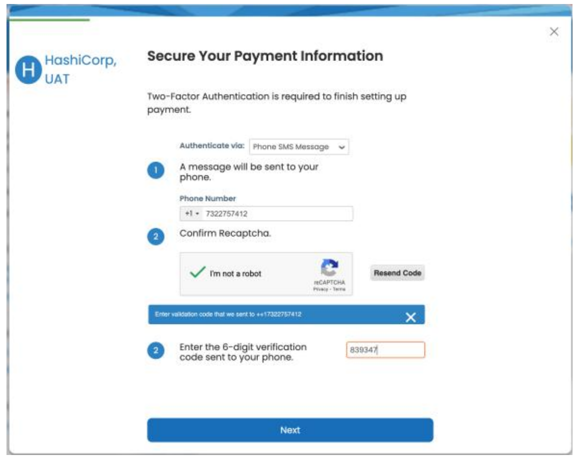
Step 1: Click "Join and Respond". After clicking "Join and Respond", you will be directed to a webpage that looks like this:



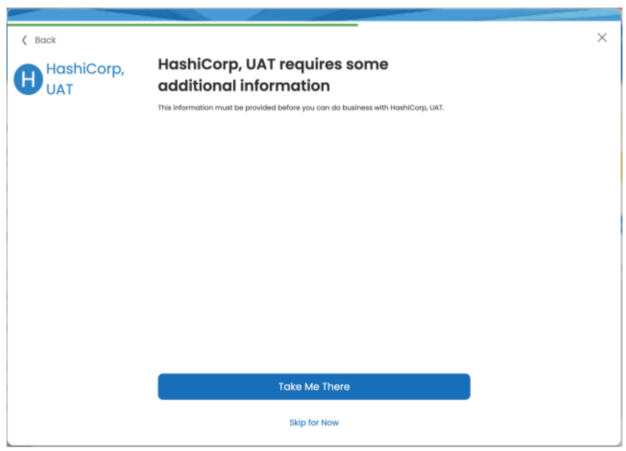
Step 2: Create and confirm a password for your Coupa account.

Step 3: Click on "I accept the Privacy Policy and the Terms of Use" and then click "Get Started".

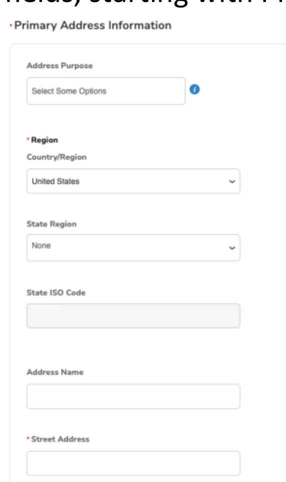
Step 4: You will be directed to setup two factor authentication. Once this is complete hit 'Next'.



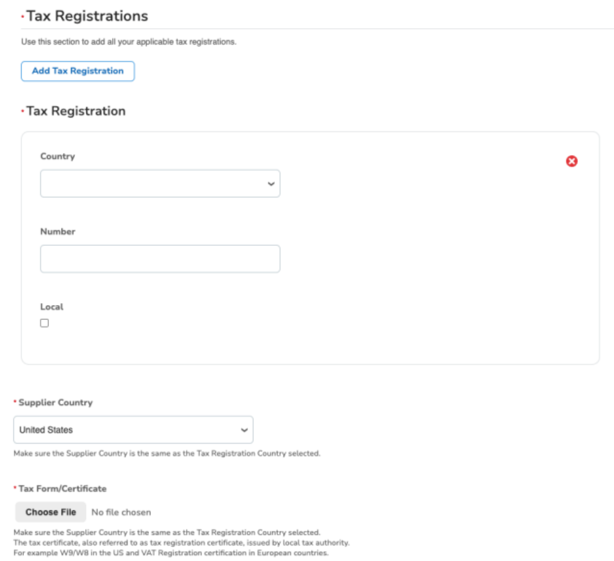
Step 5: After entering some basic information on your company a page will say 'HashiCorp requires some additional information.' Click on 'Take Me There'.



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

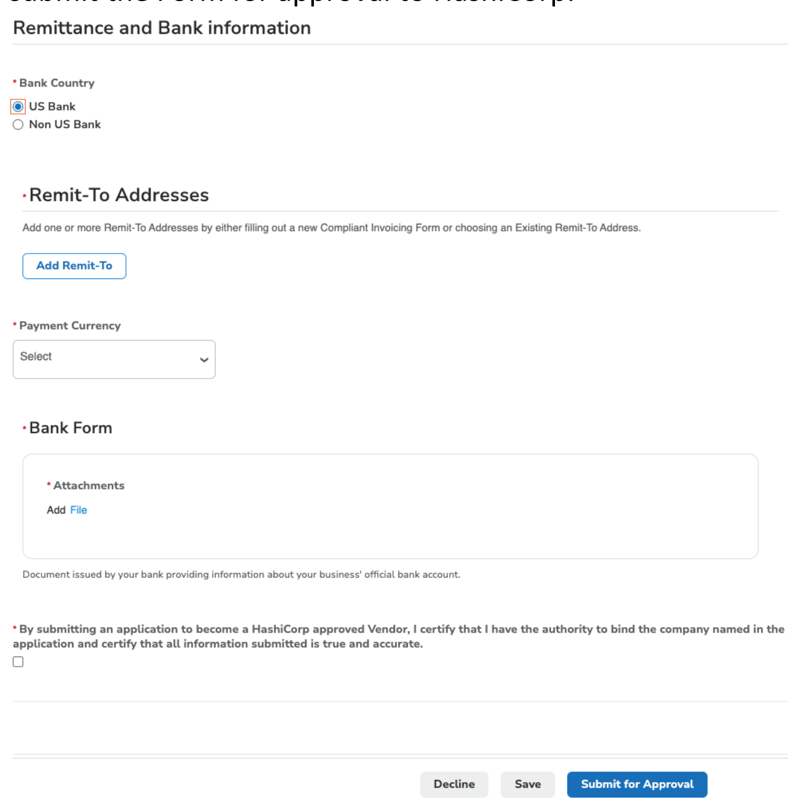
Make sure the Supplier Country is the same as the Tax Registration Country selected.

* 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/W8 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

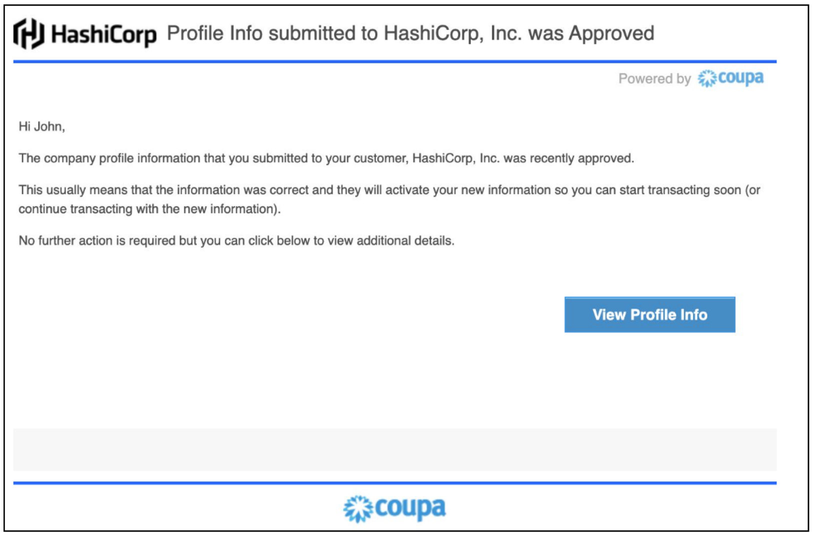
Add File

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 coupa

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).

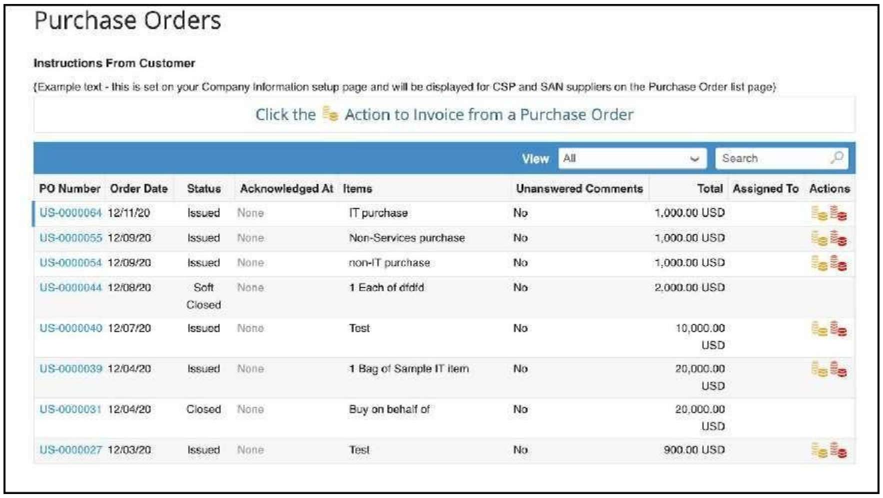
No further action is required but you can click below to view additional details.

View Profile Info

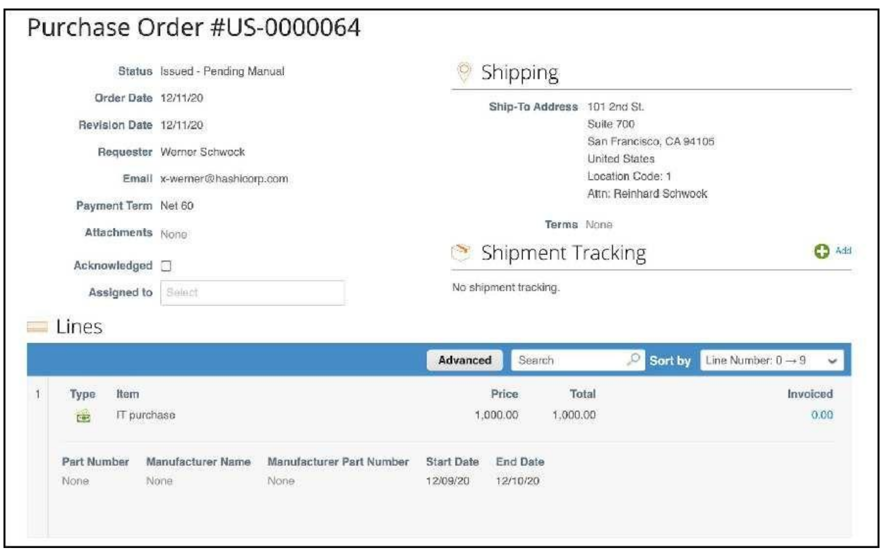
coupa

Submitting PO Backed Invoices

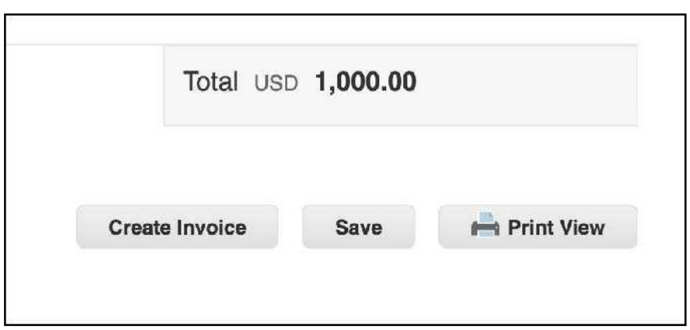
Step 1: Click on the “orders” tab on the navigation bar. It should look like this:



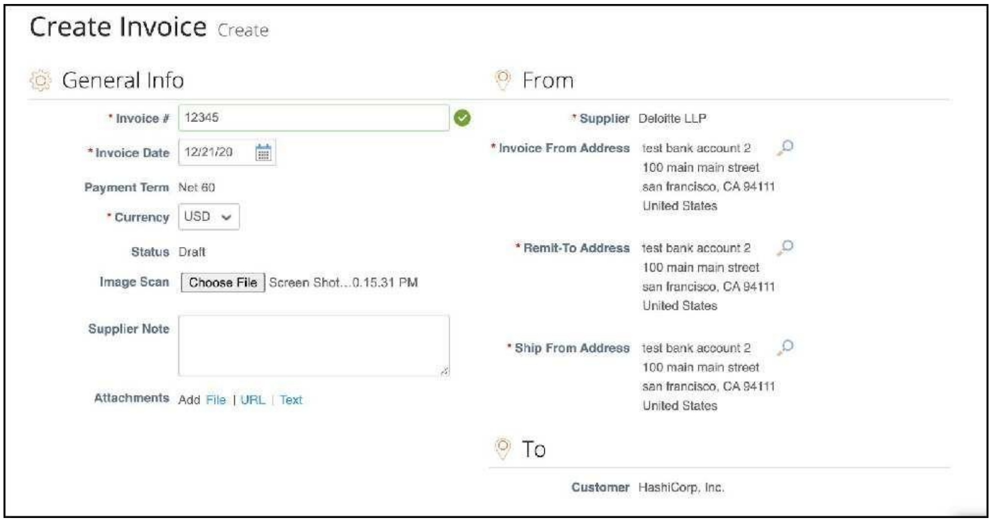
Step 2: Click into whichever PO you would like to invoice. Double check that it is the correct purchase order.



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

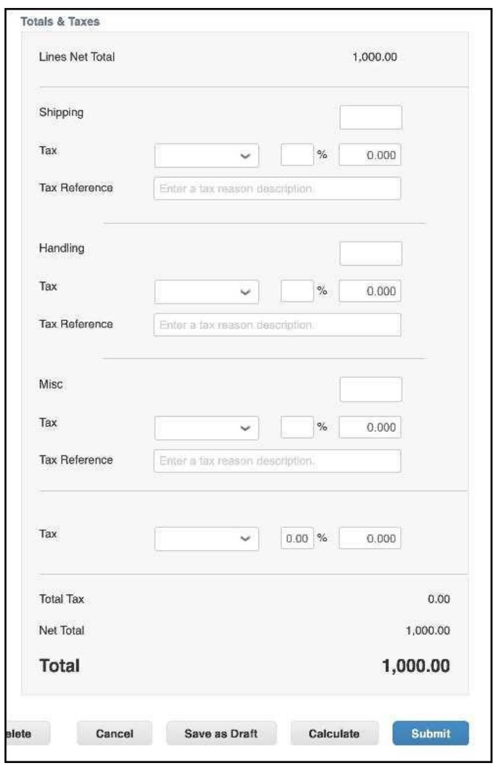


Step 4: Enter the invoice number, invoice date, and currency. Then upload a picture of the invoice through Image Scan using the “Choose File” button. Scroll down and click on “Submit” and then “Send Invoice”.



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

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

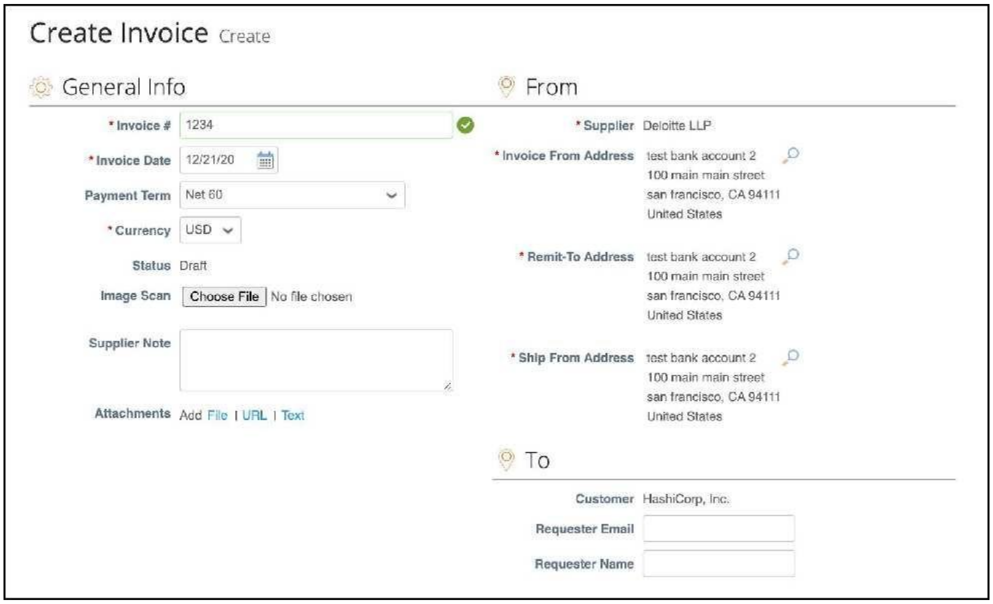


Submitting Non-PO Backed Invoices

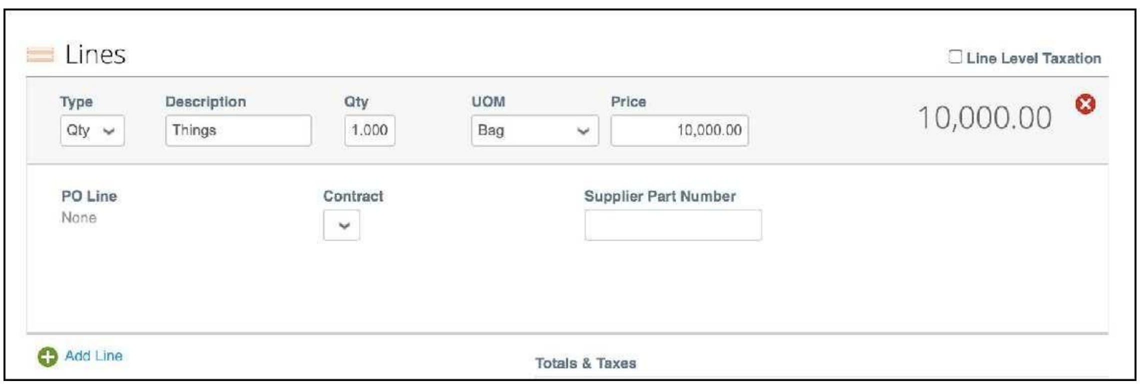
Step 1: Click on the “invoices” tab on the navigationbar.

Step 2: Click on “Create Blank Invoice”.

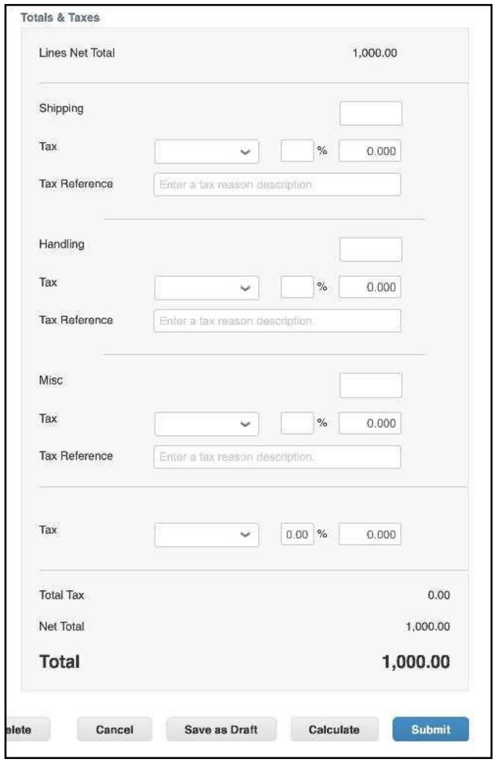
Step 3: Enter the invoice number, invoice date, payment terms, and currency. Then upload a picture of the invoice through Image Scan using the “Choose File” button.



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



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

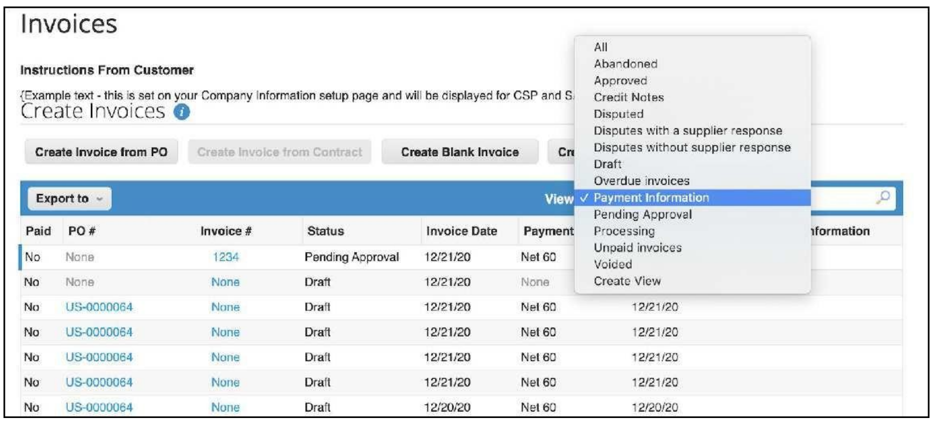


Check Payment Status

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

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

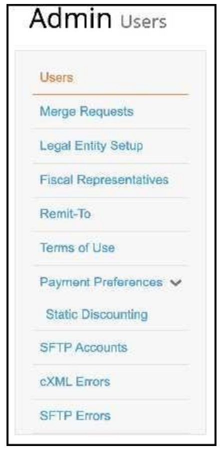
Step 3: Select “Payment Information.”



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 for any questions to do with Coupa.