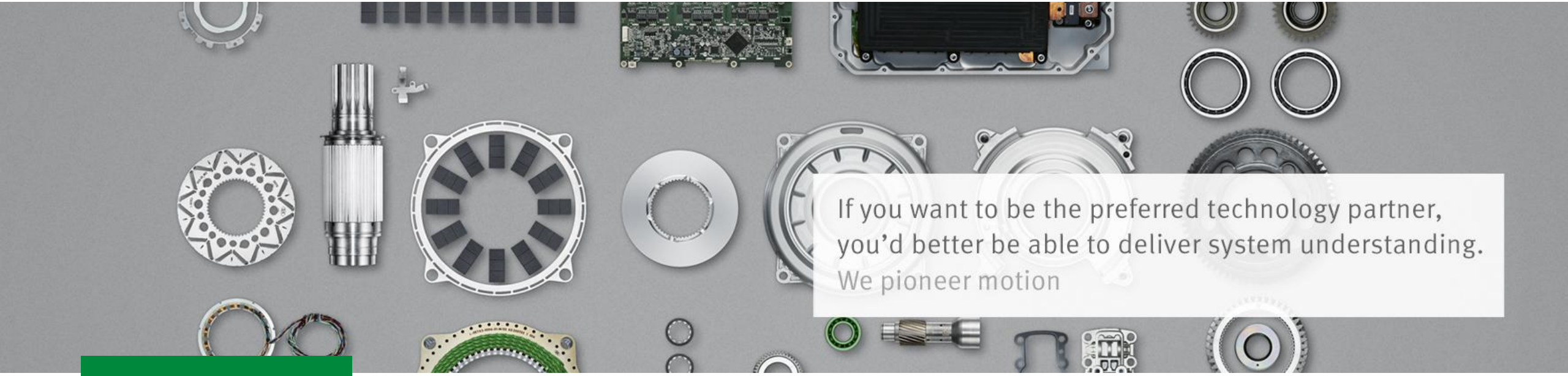
SCHAEFFLER



Guide for registering as new supplier for Schaeffler

Version: Global
Created: August 9th 2024

We pioneer motion

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Overview

1 What is Coupa?
2 First Time Registration
3 Create an Account in Coupa
4 Verification via Email
5 Join an existing Account
6 Navigating to Information Requests
7 General Data
8 Primary Address
9 Additional Information
10 Financial Data
11 Certified Management System (Code of Conduct, Certifications etc)
12 EFT Form
13 Federal Tax Form
14 Registered Diverse/Minority Suppliers
15 Final Step: Submit for Approval
16 Help & Support

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What is Coupa?

Coupa is a cloud-based Business Spend Management platform that allows organizations such as Schaeffler to manage their spend across Procurement, Supply Chain, and Finance.

Schaeffler has adopted Coupa as the tool to drive efficiencies across the following processes:

- Sourcing
- Contracting
- **Supplier Onboarding**
- Supplier Information Management
- Purchase Order (PO) Processing for specific commodities

Coupa is a secure and reliable portal that is free of charge for you to use and provides the following advantage:

- **Information Management**: On the Coupa Supplier Portal (CSP), you will be able to maintain your customer information such as contacts, addresses, and banking details.

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First Time Registration

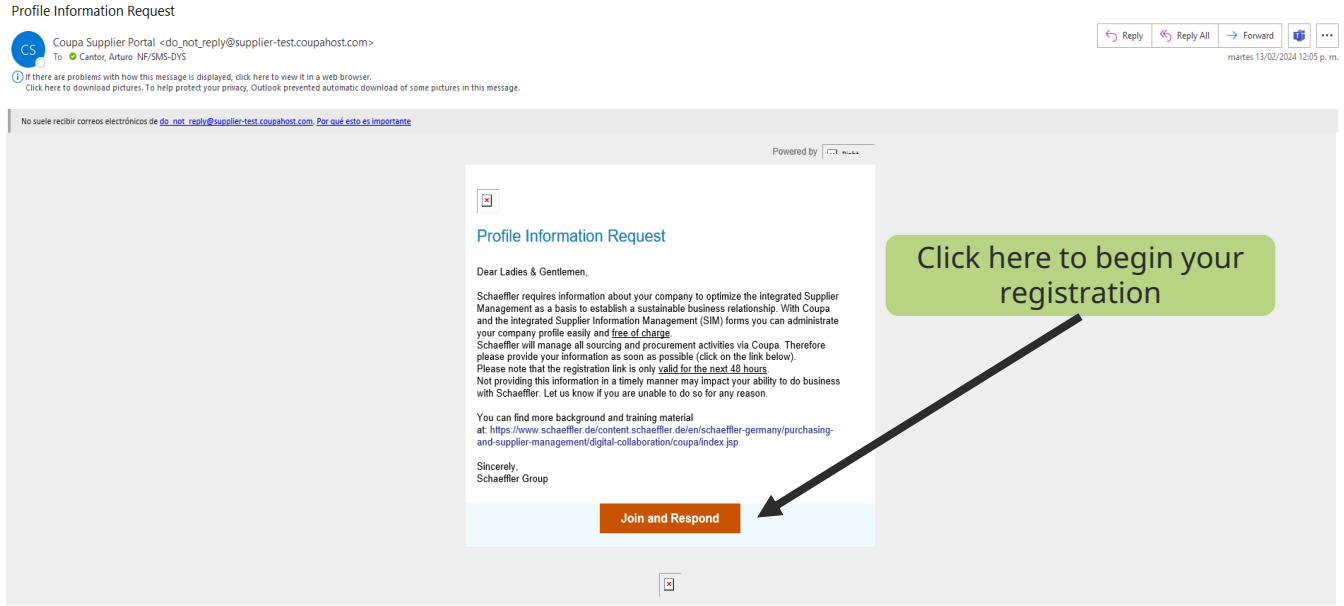
Schaeffler has initiated your onboarding process, and you will receive an email invitation to connect on the Coupa Supplier Portal **(CSP)**.

Please do not forward the email invitation to anyone else in your organization. The email address that is receiving the connection request is the one that must be used to log into the Coupa Portal.

Let us know if anyone else in your company should be completing the onboarding process and we will resend the request to their contact.

If you are **new** to the **CSP** you will receive an email as shown to the right.

If you have **previously** used the CSP with other customers, you will be linked to Schaeffler upon login. You will still need to complete your profile information request and send it back to Schaeffler.



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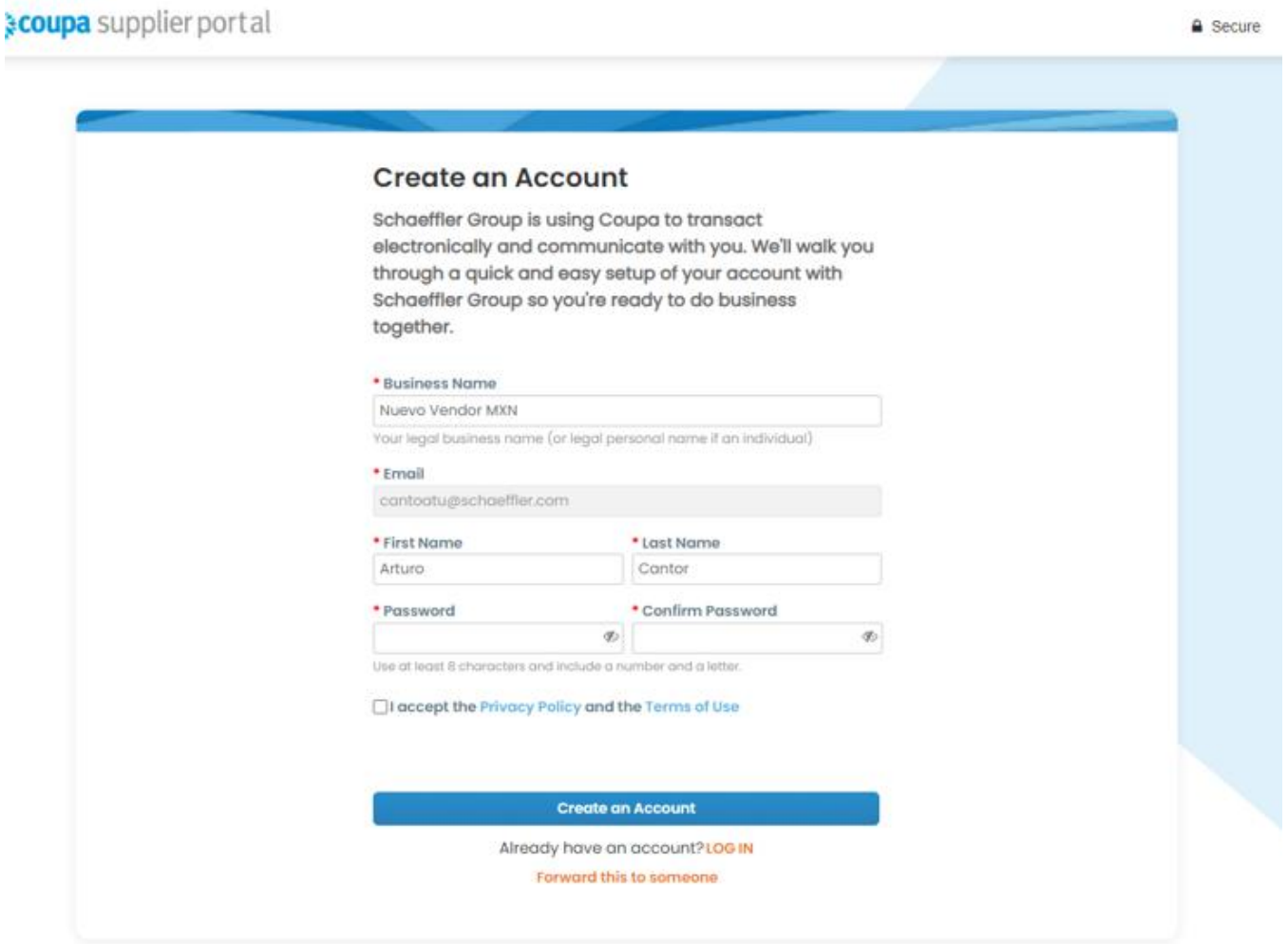
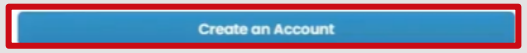
Create an Account in Coupa



- Please confirm or fill out the following fields

1. *Business Name**
2. *Email**
3. *First Name**
4. *Last Name**
5. *Password **
6. *Confirm password**

- Once done, **click on the "Create an Account" button**



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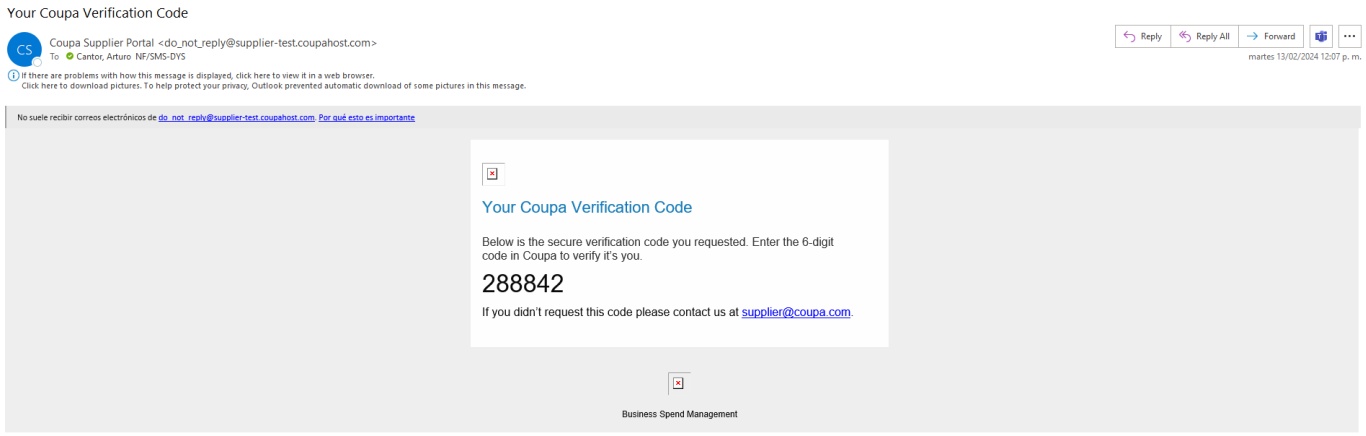
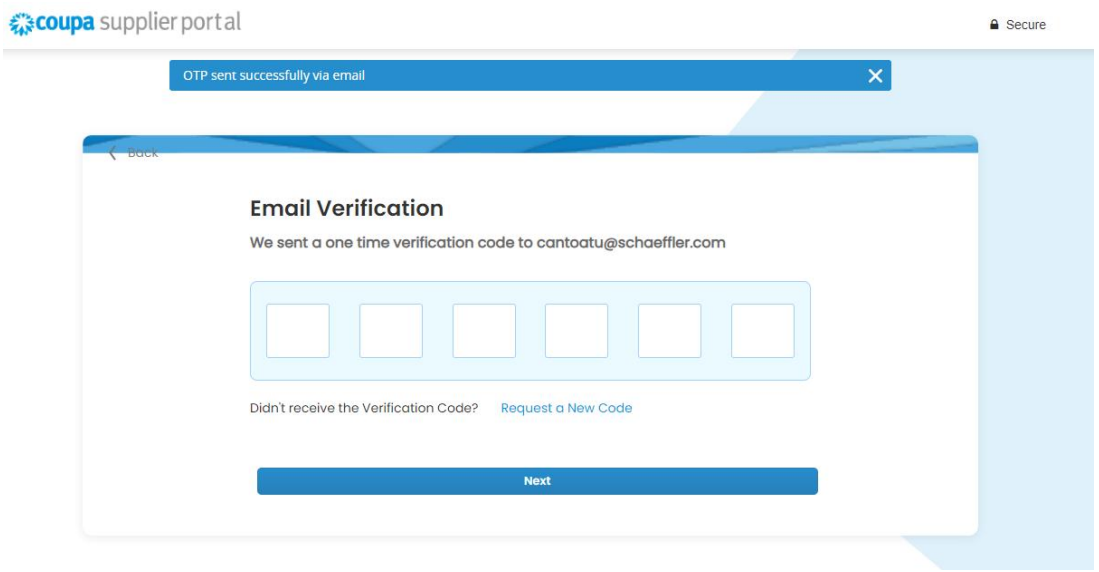
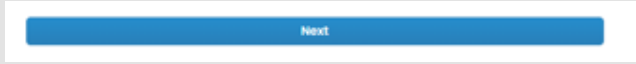
Verification via email





- For security reasons, Coupa has a two-step verification. You will receive a second email with 6-digit code (screenshot below) that you must enter in the Coupa Portal
- Once done, **please click on the "Next" button**



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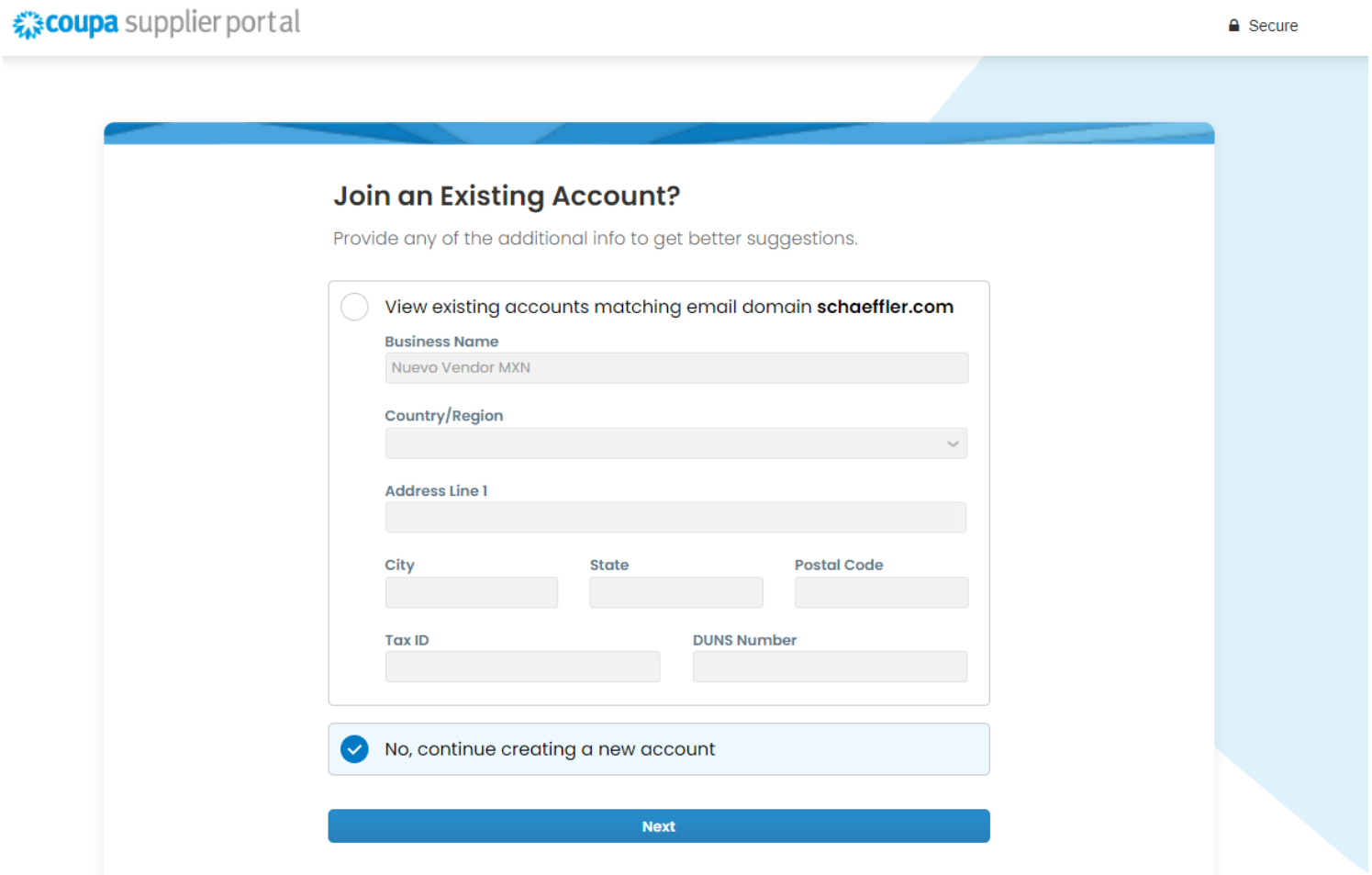
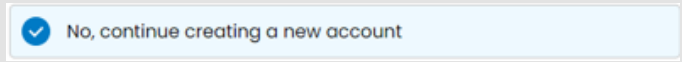
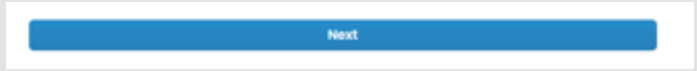
Join an existing Account (Option 1)



- Please just select “No, continue creating a new account” option if you are **new** to the Coupa Supplier Portal.



- **Please click on “Next” button**



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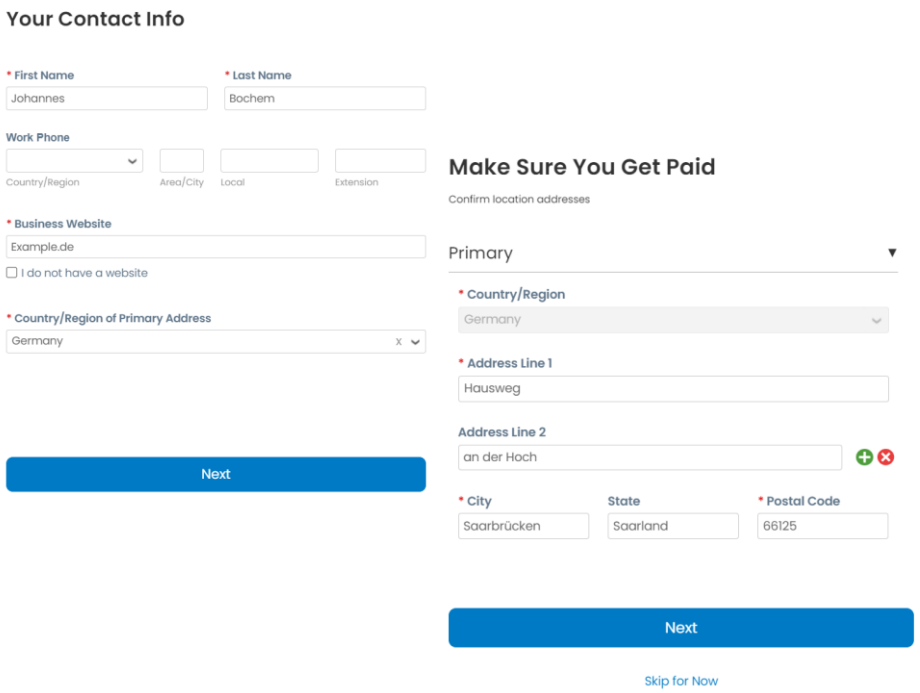
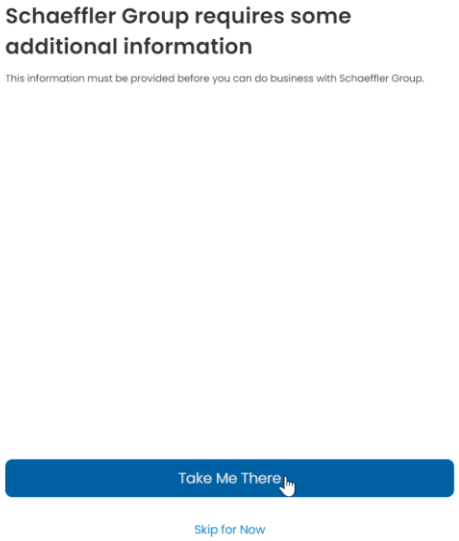
You are new with Coupa (Option 2)





- Fill out your Contact info -> Click next
- Fill out “Make Sure you get Paid” -> Click next
- Click “Take me There”

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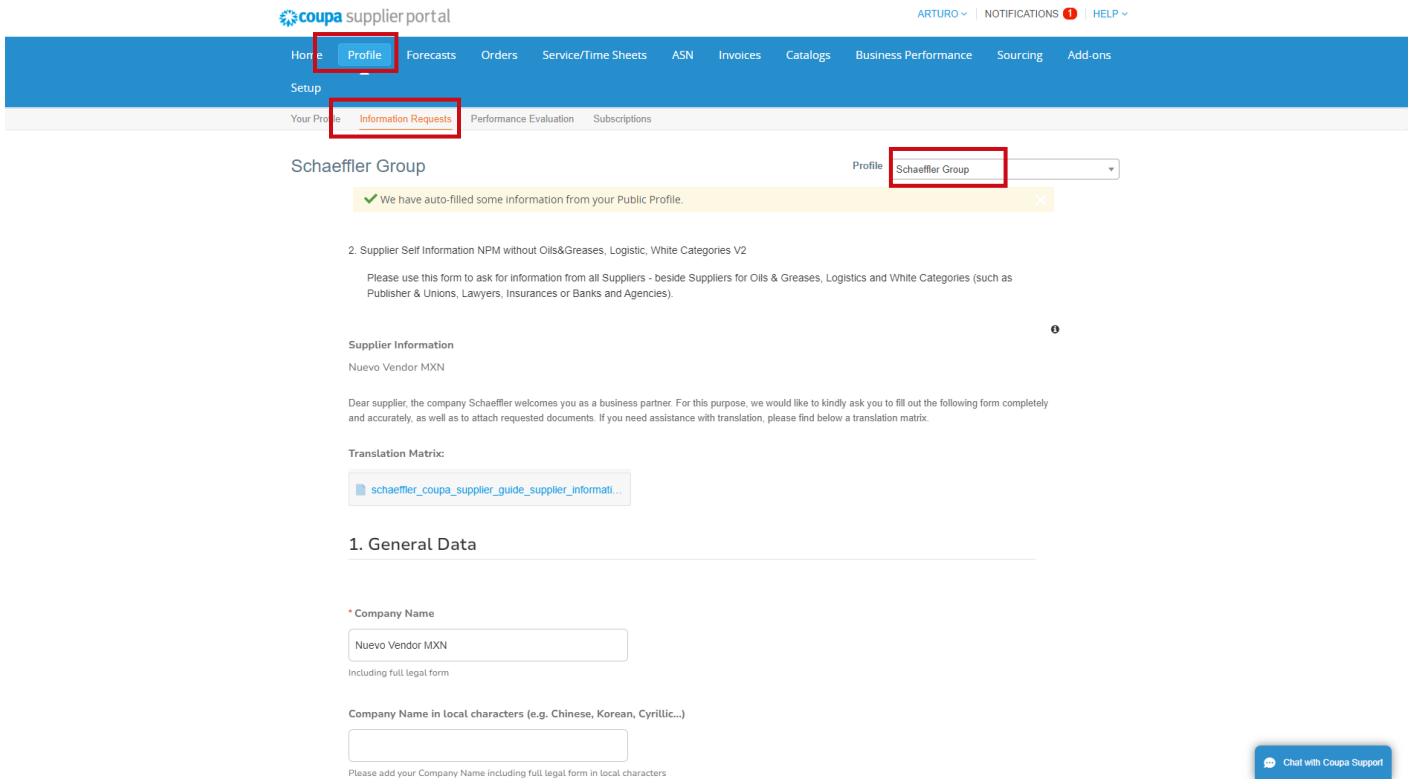
Navigating to Information Requests (If you skip the forms displayed before)



You can also access this screen if you click ***"Profile" >> "Information Requests"***

Please ensure *Schaeffler Group* is selected in the drop down on the right-hand side.

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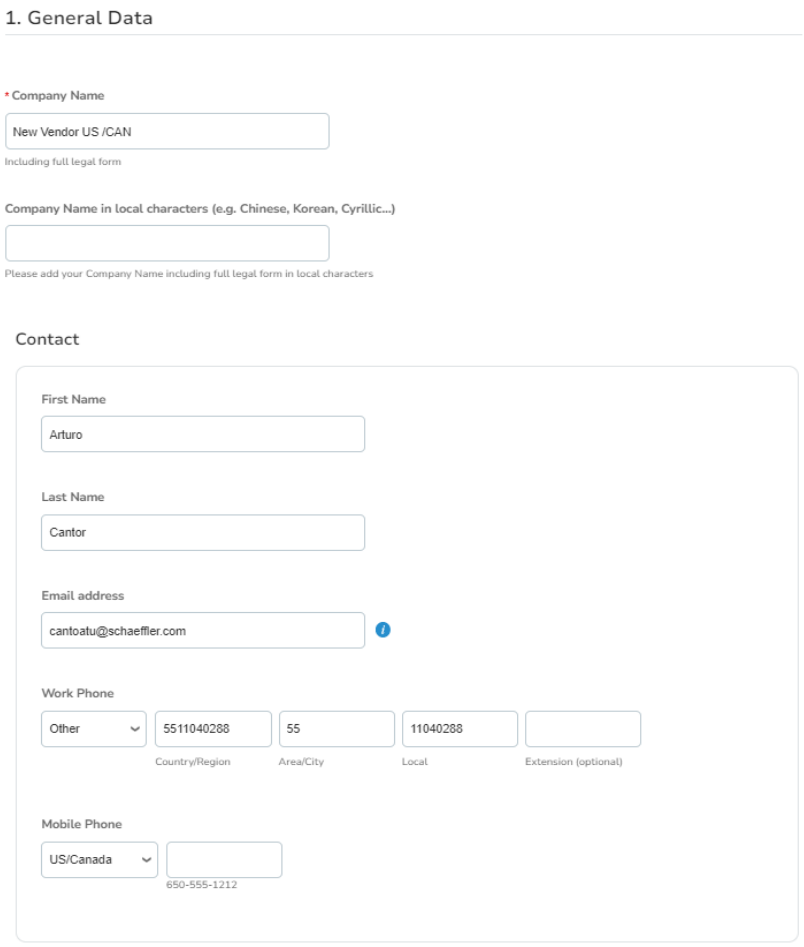
General Data



On this screen you will start to fill out your company information and attach the requested documents

- Please verify:
  1. Company Name* *(*As shown in your legal establishment document)*
  2. First Name*
  3. Last Name*
  4. Email Address
  5. Work phone*
  6. Mobile Phone (*Optional*)

Note: the fields marked with a red asterisk (*) **are mandatory**

Please scroll down

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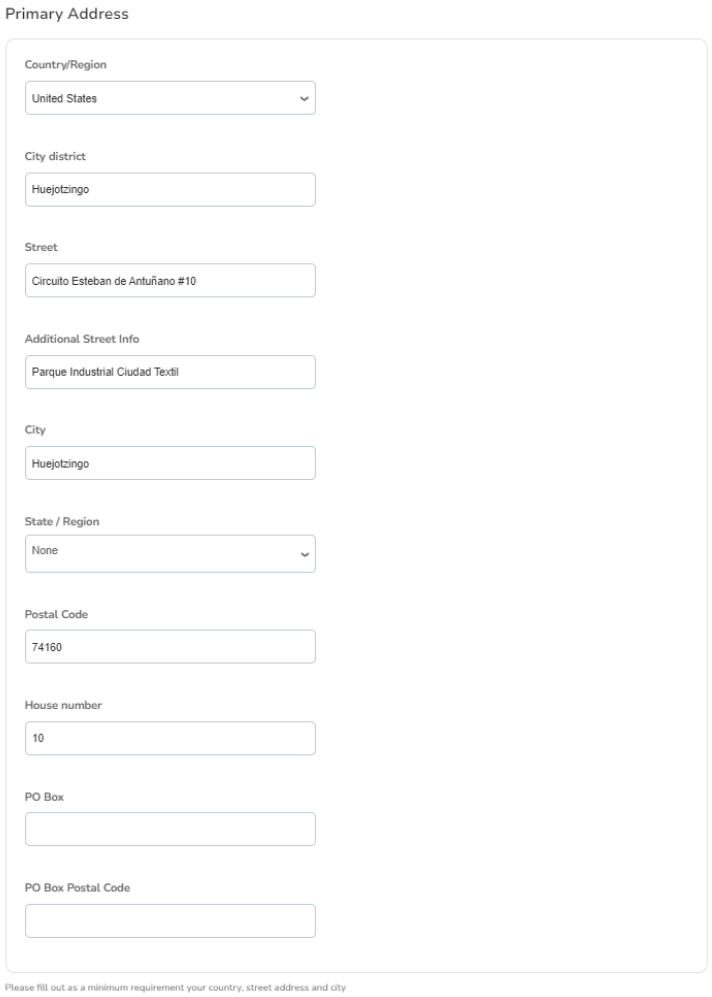
Primary Address



Note: Please do not modify this section unless there is a mistake from our side.

We have already pre-filled the following fields for you, please verify if it is correct:

1. **Country/Region**
2. **City District**
3. **Street**
4. **Additional Street Info**
5. **City**
6. **State /Region**
7. Postal Code
8. PO BOX (Optional)
9. PO BOX Postal code (Mandatory if you fill out PO Box field)

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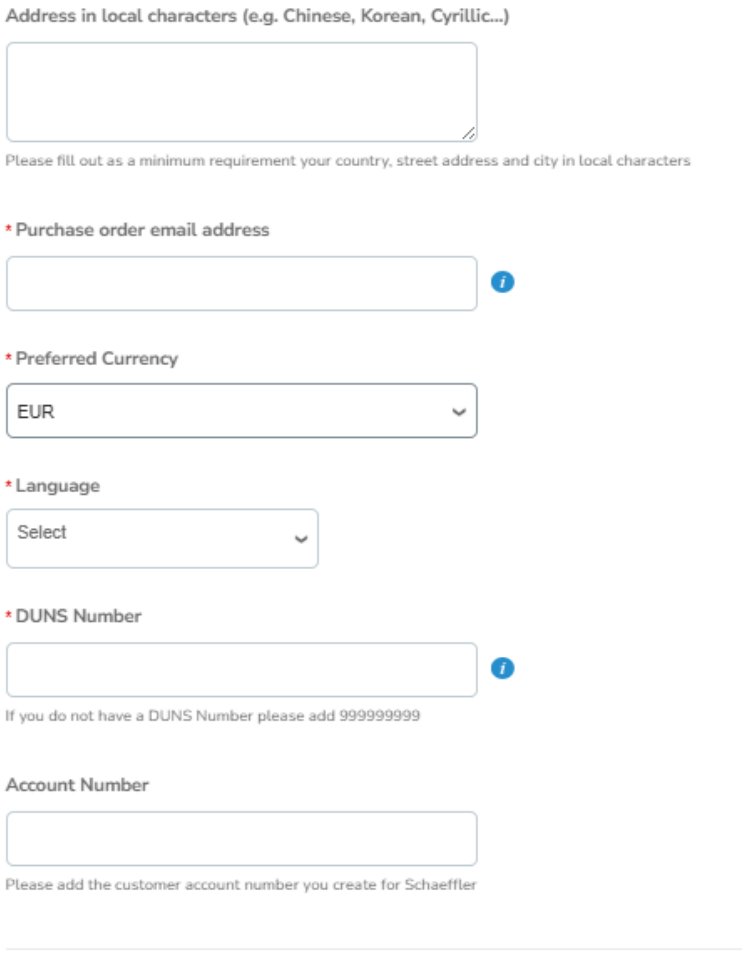
Additional Information



Enter your information and email for receiving our purchase orders

Please complete or verify the following fields

1. ***Purchase order email address****
2. **Preferred Currency* (Just one and same as the bank account)**
3. **Language***
4. **DUNS Number***: If you have a DUNS number please enter, **otherwise add 999999999 (ninefold the number 9**)
5. Parent Company Name

Note: the fields marked with a red asterisk (*) **are mandatory**

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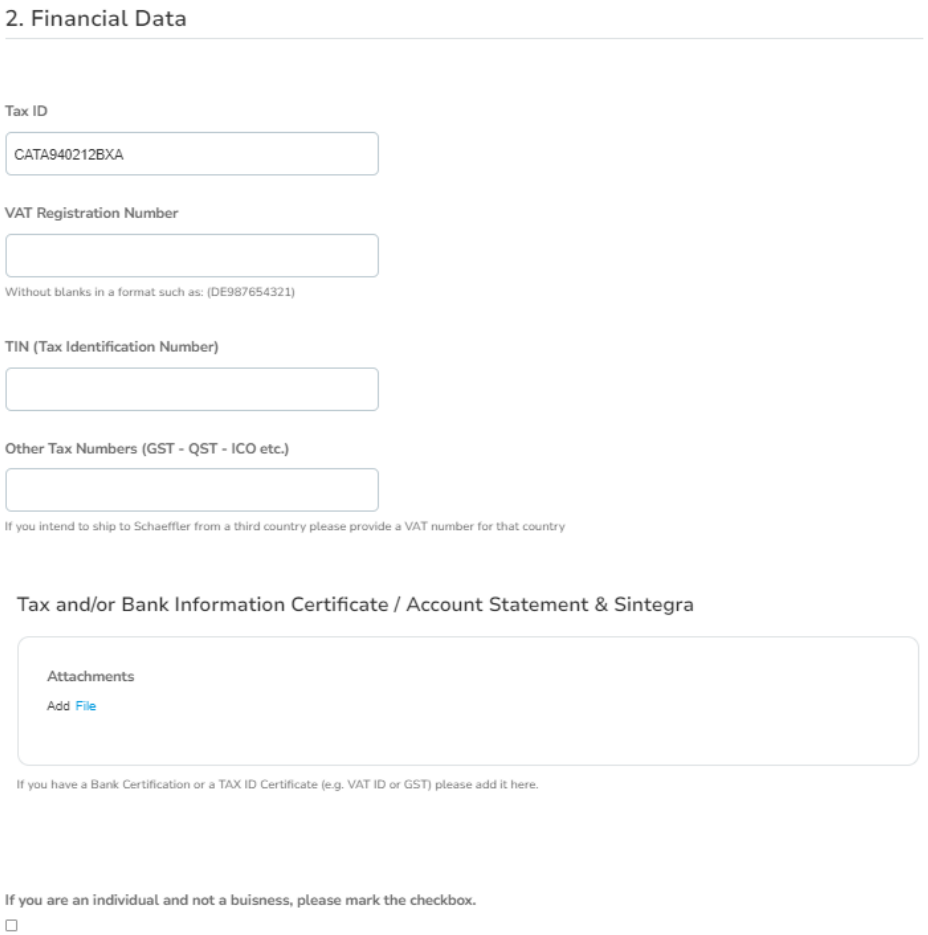
Financial Data



1. Enter your Tax ID
   - ***For Canadian Suppliers:*** TIN (Tax Identification Number) 15-digit code
   - ***For USA Suppliers:*** Tax Number: Employee Identification Number on W9
2. Please indicate if you are an individual and not a business

Note: the fields marked with a red asterisk (*) **are mandatory**

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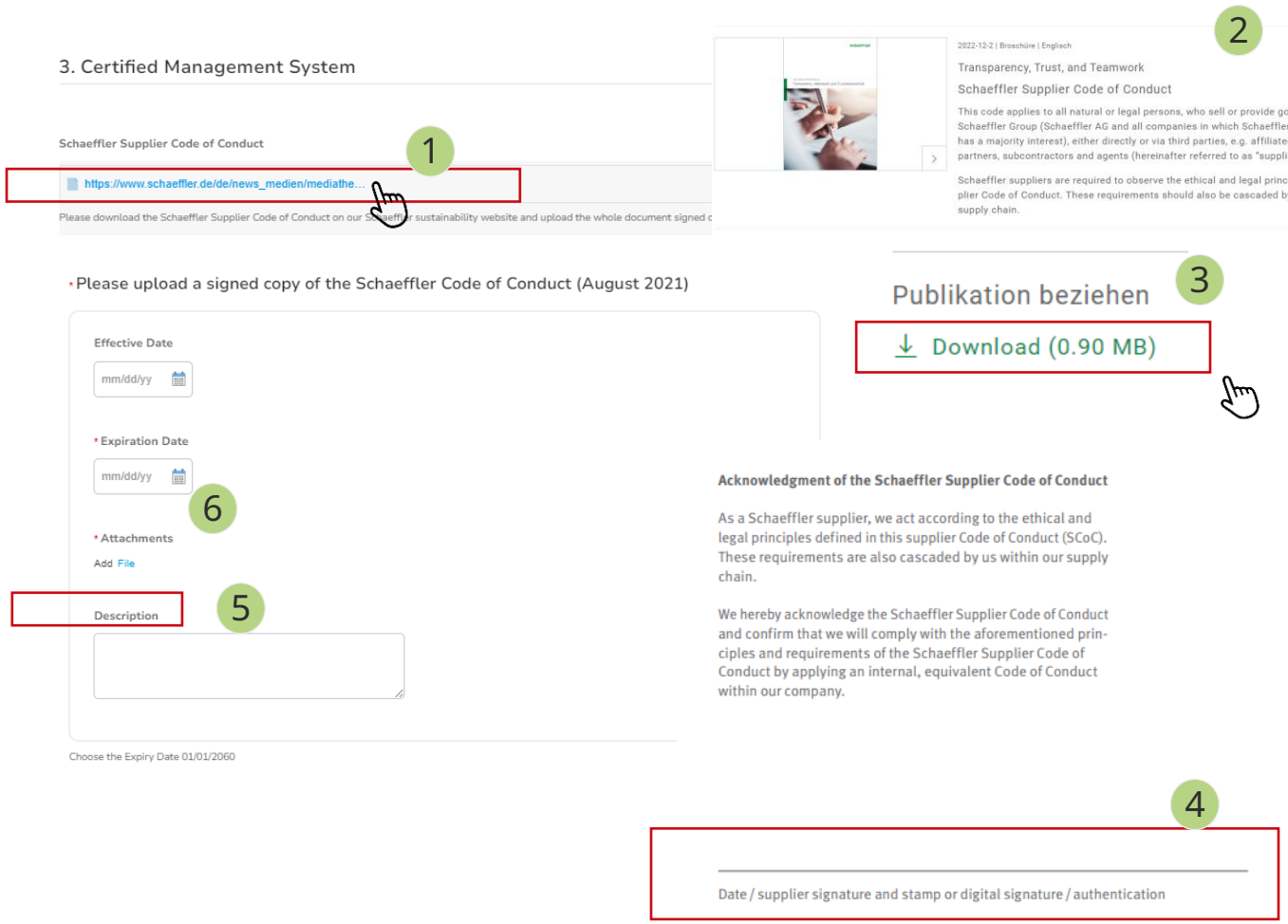
Certified Management System (Optional)



1. Please click on the link underlined to download our **Code of Conduct.** A new browser window will be open.
2. You will be forwarded to the Schaeffler Website. Please scroll down until you can find the English version.
3. Then download the PDF file.
4. The document must be signed by your company legal representative on page 12*.
5. Please attach the document in Coupa*
6. Choose as expiration date: 01/01/2060*

Note: the fields marked with a red asterisk (*) **are mandatory**

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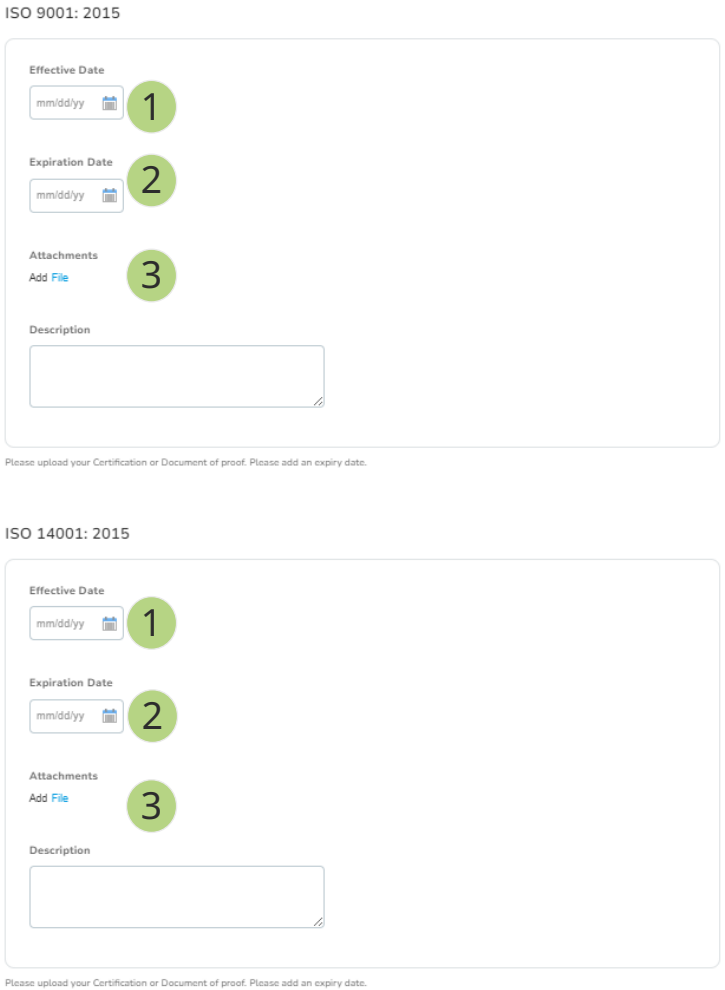
Certified Management System (Optional)



If your company is ISO 9001 and/or ISO 14001 certified and you want to attach in Coupa, please fill the fields on the left, ***if you do not have any of these certificates you can skip this step.***

1. Choose today as effective date: *
2. Choose the expiration date of your certificate.
3. Attach your documents

Note: the fields marked with a red asterisk (*) **are mandatory**

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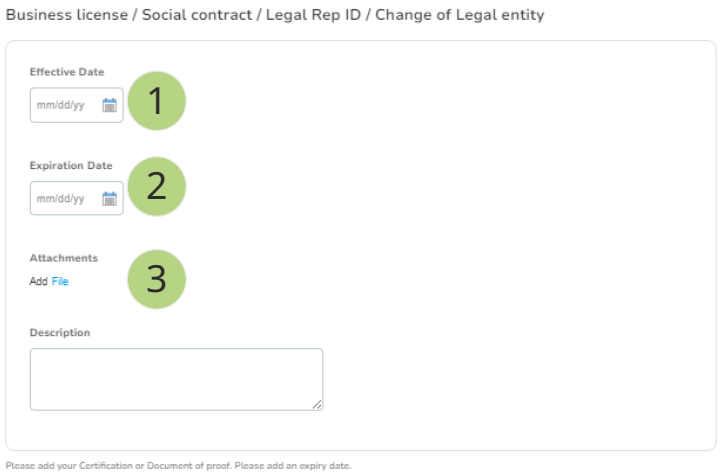
Attach documents: Legal ID and Company Profile (Optional)



This information is **optional** for suppliers delivering to Schaeffler USA and Canada

Business license /Legal Rep ID

Please attach your companies legal representative ID Document

1. Choose today as effective date.
2. Choose **01/01/2060*** as expiration date.
3. **Attach your document in Coupa.**

Company Profile:

1. Choose today as effective date.
2. Choose **01/01/2060*** as expiration date.
3. **Attach your documents in Coupa.**

– Legal establishment document or business register document of your company valid on your country.

– **For instance,** *USA : W9 / CAN: W8.*

Note: the fields marked with a red asterisk (*) **are mandatory**

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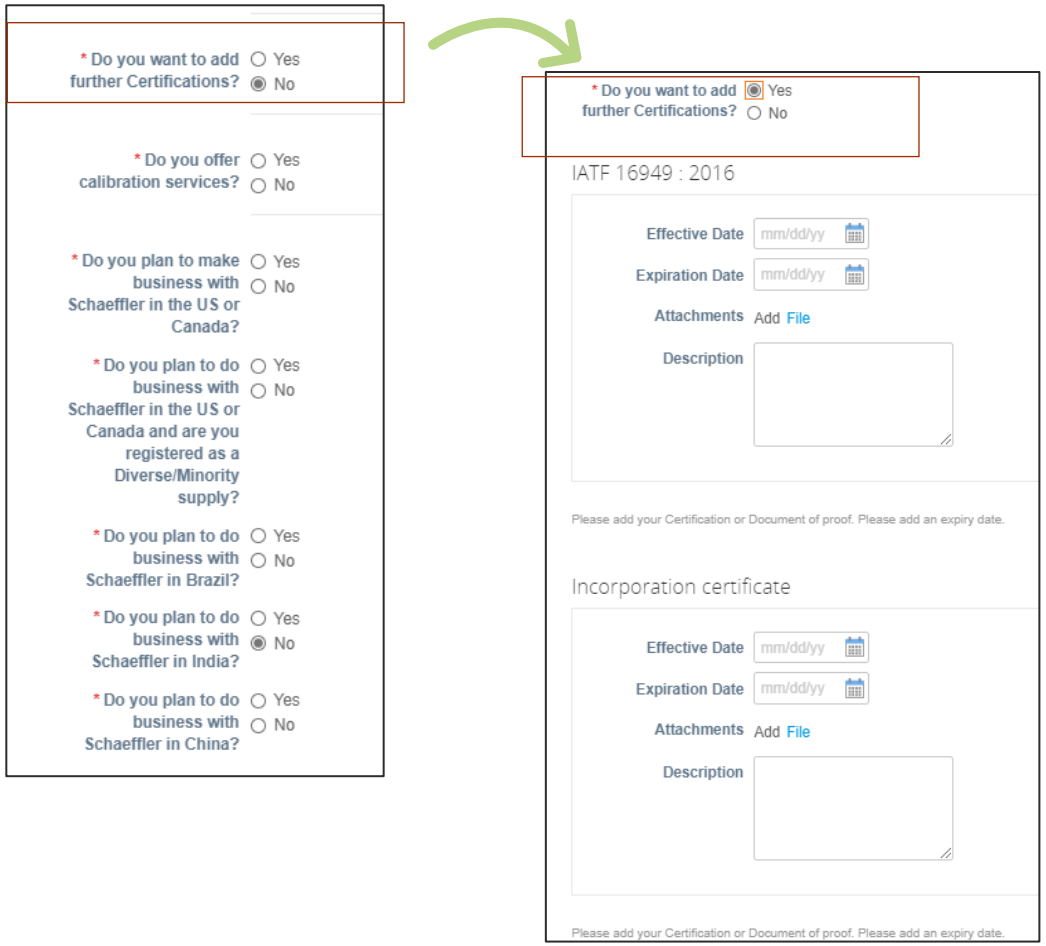
Attach documents: additional Certifications (Optional)



1. If you want to add other certifications, please select **"Yes"** to the question *"Do you want to add further Certifications?"*
2. Once selected "Yes", an extra form section will be opened.
3. If you do not want to attach an extra certifications, please select **"No"** option**.**

Note: the fields marked with a red asterisk (*) **are mandatory**

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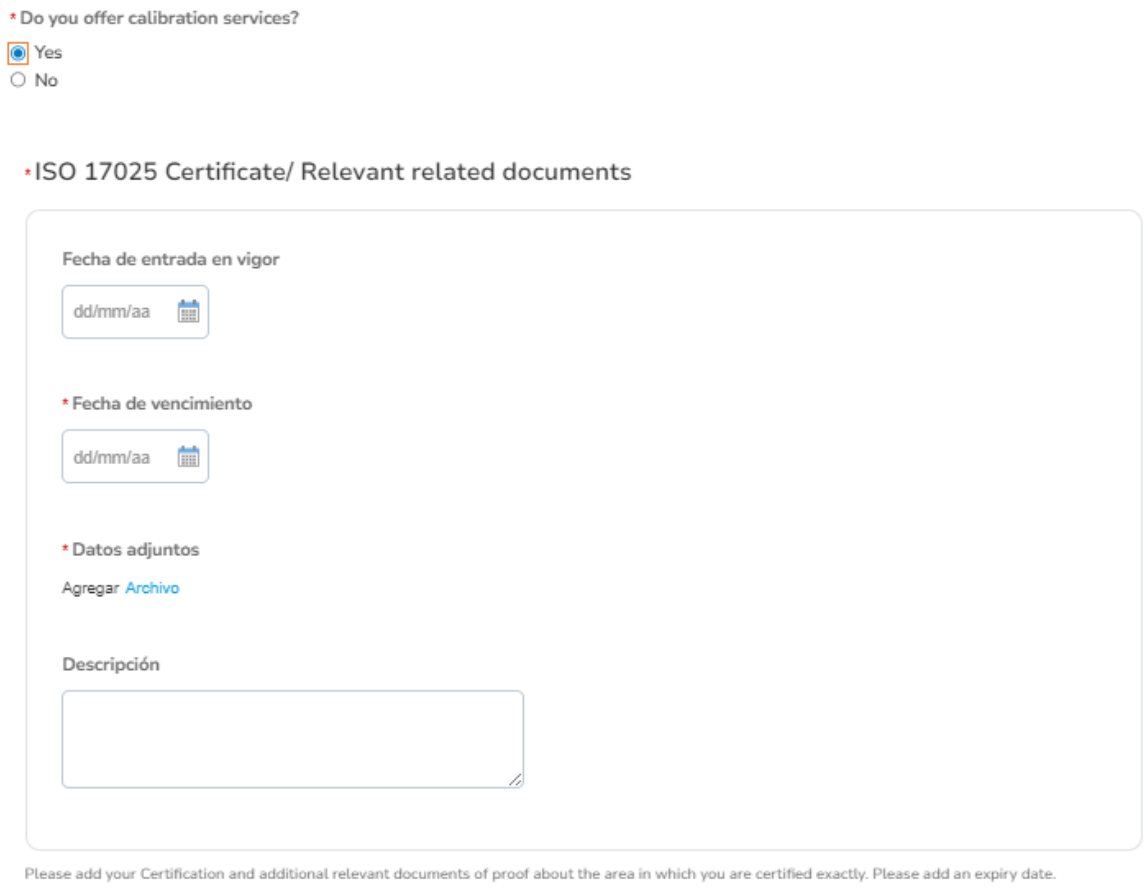
Special Case: Calibrations (Optional)



1. If your company will provide any accredited Calibration Services to Schaeffler, **it is mandatory to attach the ISO 17025 certification + Scope.**
2. Please click "Yes" below the question *"Do you offer calibration services? "*
3. Once selected "Yes", an extra section will populate for you to attach your certificate*.
4. Choose the expiration date as your document certificate states*.

If your company does not offer accredited Calibration Services, just select ***"No"***

Note: the fields marked with a red asterisk (*) **are mandatory**

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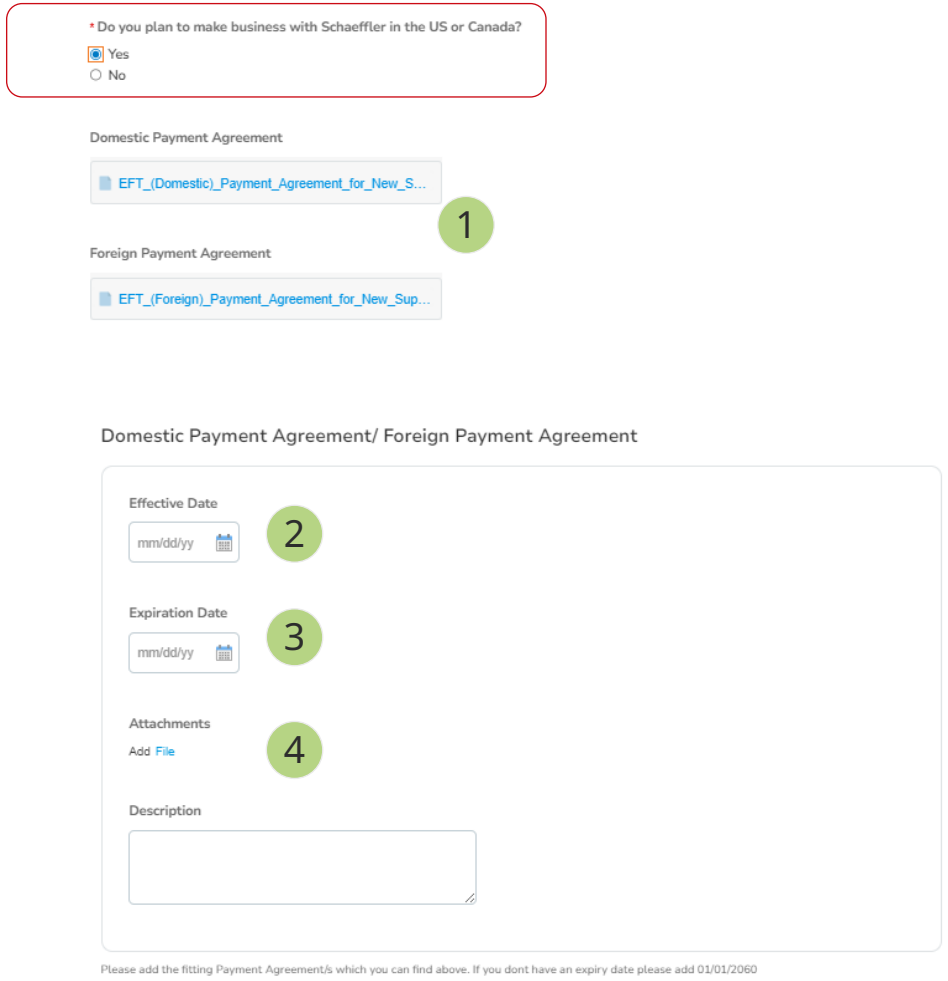
Financial Documents – EFT (Optional)



For domestic companies supplying materials and/or services to any Schaeffler plant in US and /or Canada, please select “yes” for the question shown on your left.

1. Download the EFT form and fill out with your company data
2. Choose today as effective date
3. Choose **01/01/2060*** as expiration date of your document .
4. **Attach your EFT document in Coupa.**

Note: Please make sure all your data is accurate otherwise the document will be rejected. The document must be signed by your company legal representative*.

Note: the fields marked with a red asterisk (*) **are mandatory**

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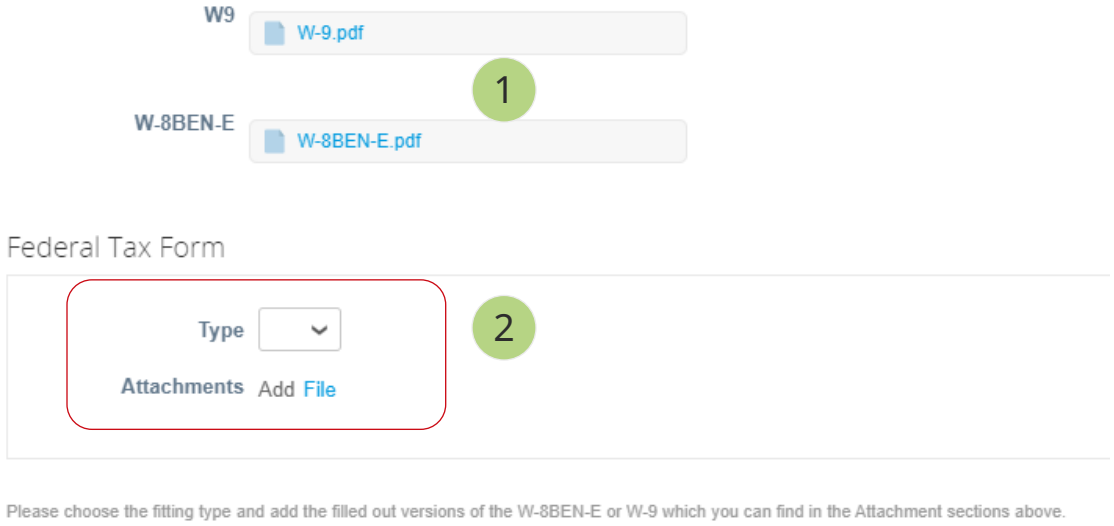
Financial Documents – Federal Tax Form (Optional)



1. Please download the empty W9 for US company and W-8BEN-E for Canadian company
2. Please select the type of tax form from the drop-down menu and upload your information

Note: the fields marked with a red asterisk (*) **are mandatory**

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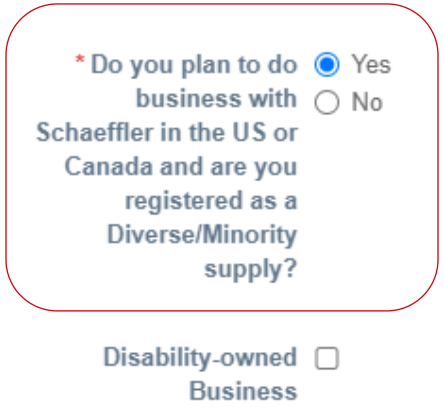
Registered Diverse/Minority Suppliers



Available Minority business types:

- Minority Business Enterprise or another similar document
- Women Business Enterprise
- Small Business Association 8(A) Program
- Veteran-owned Business
- Hubzone Business
- LGBT-owned Business
- Disadvantaged Business Enterprise

1. Please Click on “Yes” against the next question if your company is registered as **Diverse/ Minority supplier.**
2. Please find your business type and upload your certification or document of proof.

Note: the fields marked with a red asterisk (*) **are mandatory**

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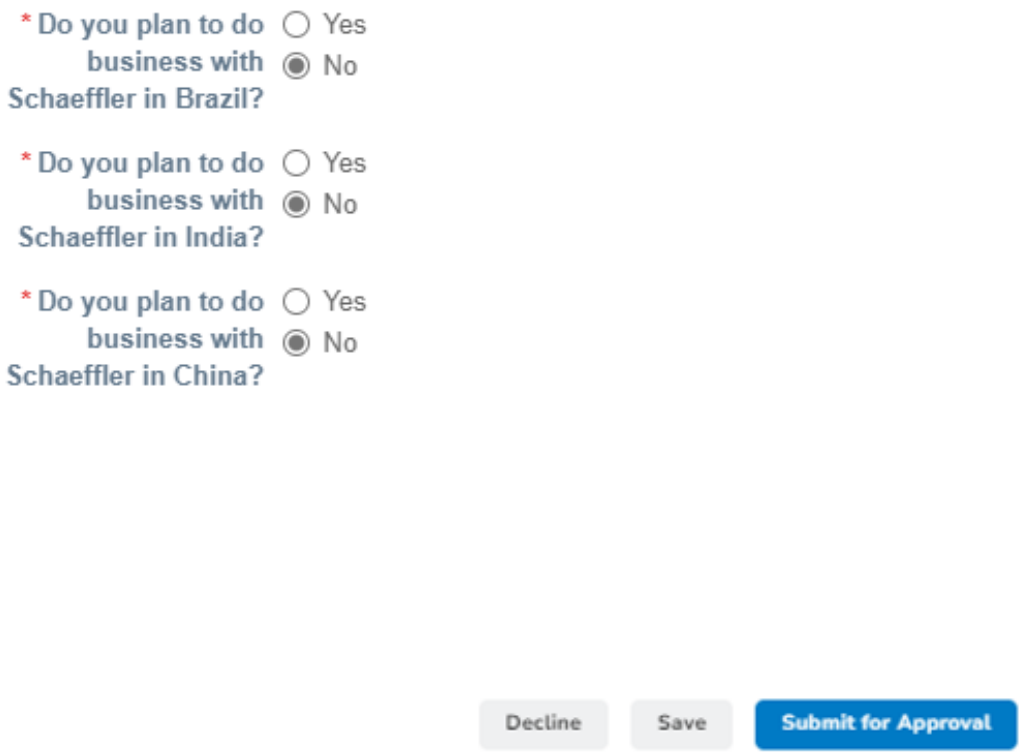
Final Step: Submit for Approval



For companies that will supply materials and/or services to any Schaeffler plant in USA/Canada, please select “no” for the questions shown on your left.

Once you have filled out all mandatory fields in the Coupa form, and you verified it is all correct, click ***“Submit for Approval”***

Note: the fields marked with a red asterisk (*) **are mandatory**

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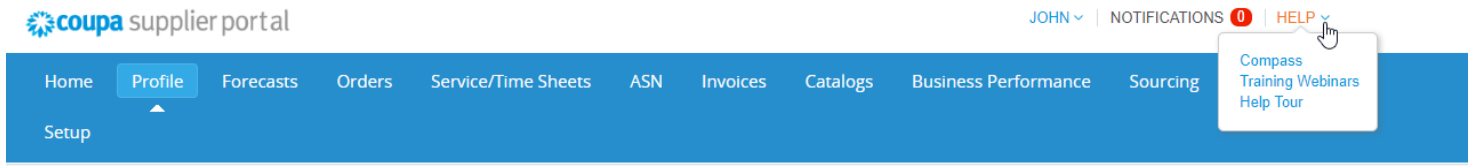
Help & Support

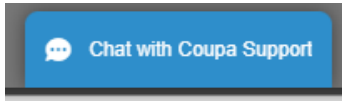
There are several ways to receive help and support in the Coupa Supplier Portal

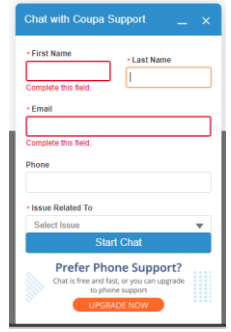
1. Hover over **Help** in the upper right-hand corner to access the following resources:
   - Compass: Be redirected to the Coupa Compass Help Page in a new tab
   - Training Webinars: Be redirected to a new page to register for upcoming webinars
   - Help Tour: Watch the introductory tour for the section of the CSP you are in (e.g., Orders, Invoices)



2. Click **Chat with Coupa Support** on the bottom right of the page to get support for a specific issue

3. Go to the Help Page for Coupa Suppliers





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