

Focusing on our core utility businesses

SIM Supplier Guide

External Job Aid



Review and Revision History

Revision No.	Review/ Revision Date	Summary of Changes	Effective Date
Original Version 2023.1		First Final	12/1/2023

NOTE: Minor changes (e.g. typos, spacing, updated reference format, broken links, etc.) are not normally tracked in the Audit Trails.

Introduction

This guide covers the following:

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Purpose

The purpose of this procedure is to assist CenterPoint Energy suppliers in navigating the process of providing supplier information via Coupa’s Supplier Information Management (SIM) module.

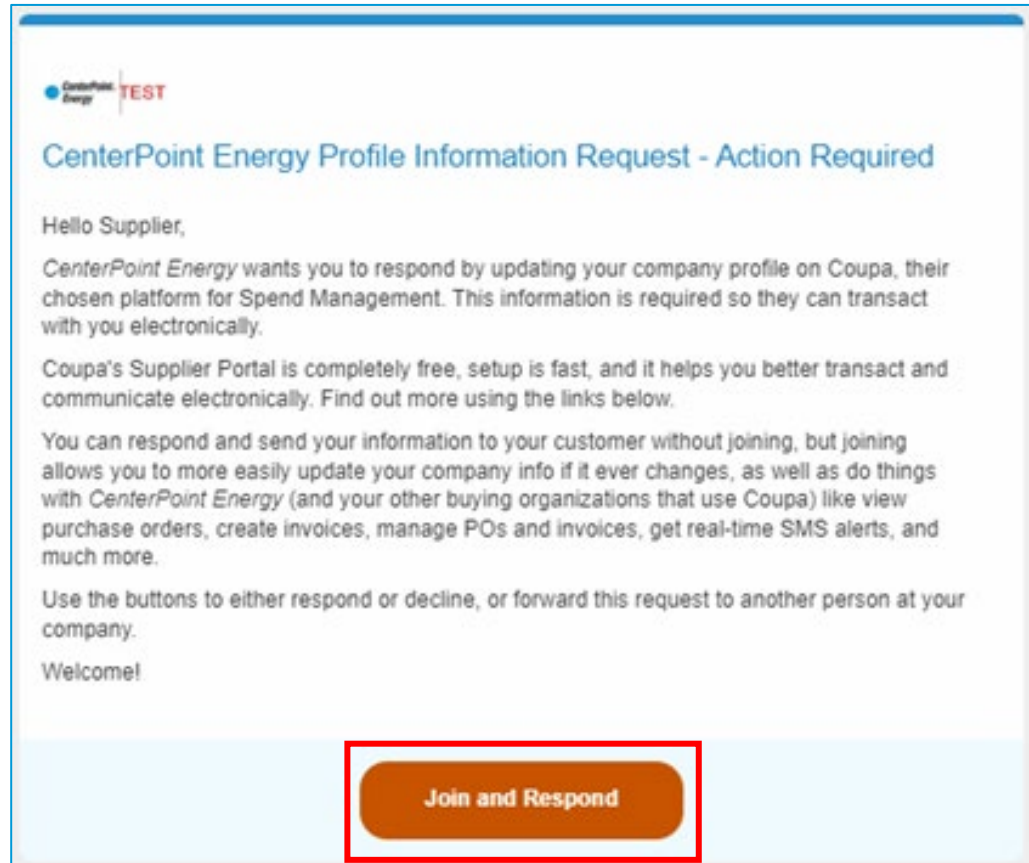
Before you begin

This process is for new and existing suppliers updating their information.

New Supplier Onboarding

You will receive an email from CenterPoint Energy requesting information.

Review the email and click the **Join & Respond** button in the email notification.



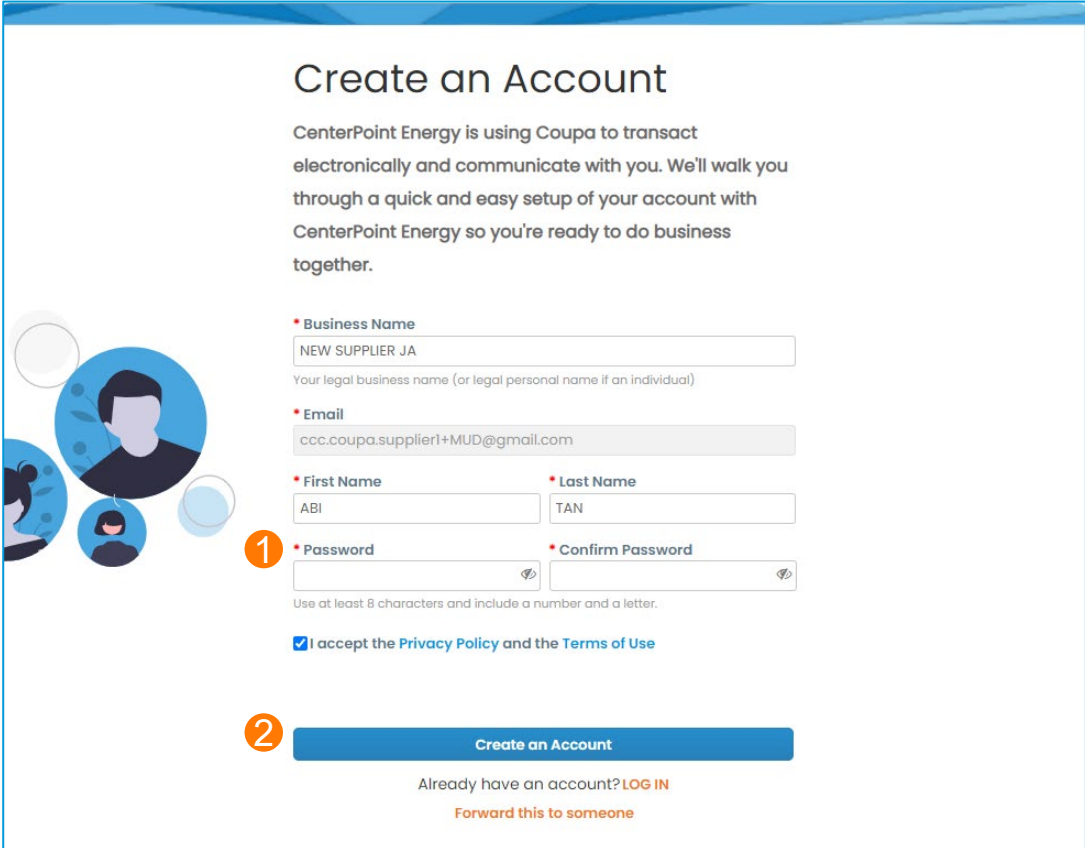
New Supplier Onboarding

New suppliers without an existing Coupa Supplier Portal (CSP) account will be prompted to create a password and provide company details.

1. Add a Password and Confirm Password. Accept the Privacy Policy and Terms of Use.
2. Then, click Create an Account.
3. You will receive a verification code via email. Please enter that code to continue.

Notes:

- Suppliers with an existing account may choose to log in directly instead via the “LOG IN” button”
- Suppliers will see a page to manage payment discount preferences in CSP. This information is not applicable as pay terms are managed by CenterPoint Energy internally via contractual agreements. Please click the Next button to proceed with setup.



Create an Account

CenterPoint Energy is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with CenterPoint Energy 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**

1 *** 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](#)

2

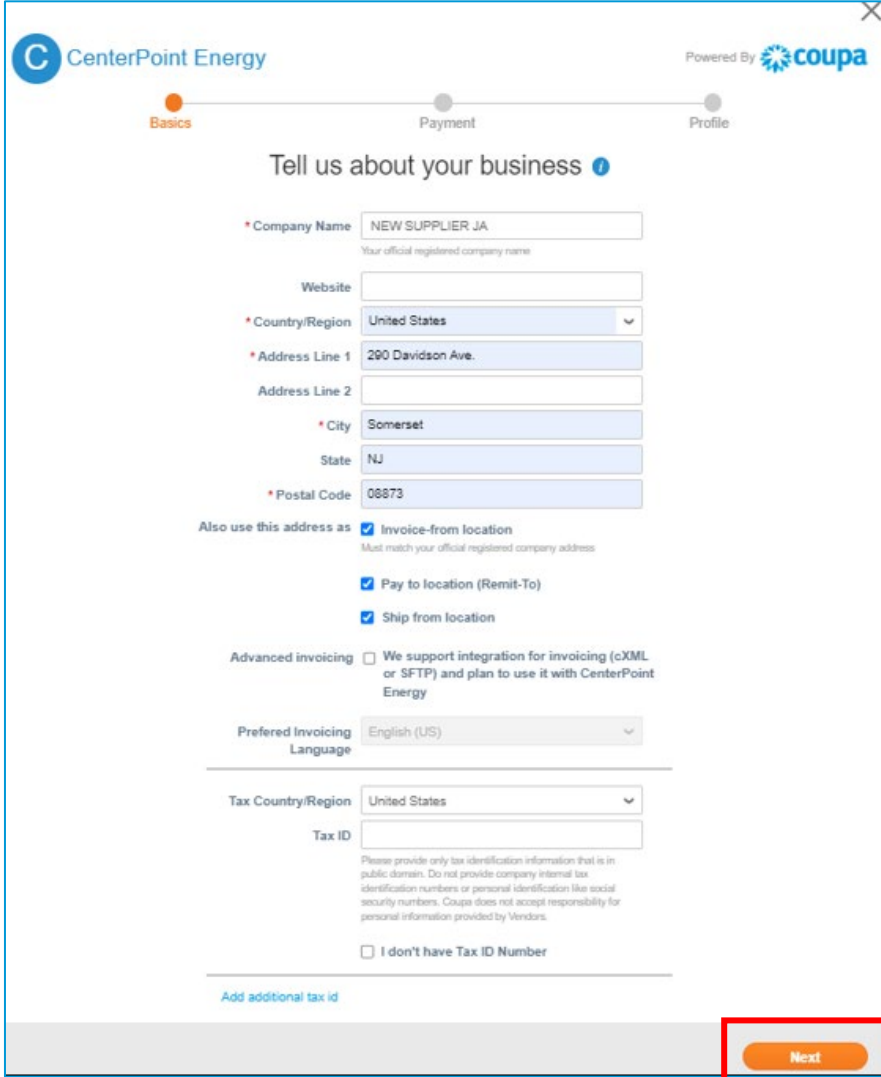
Already have an account? [LOG IN](#)
[Forward this to someone](#)

New Supplier Onboarding


New suppliers will be prompted to fill in details about their business. This section will be part of the supplier's public profile.

Once complete, click **Next**.

Note: Coupa will offer a Verified status for a fee. Using the Coupa Supplier Portal (CSP) is free and the Verification is not required.



CenterPoint Energy

Powered By 

Basics Payment Profile

Tell us about your business

* Company Name
Your official registered company name

Website

* Country/Region

* Address Line 1

Address Line 2

* City

State

* Postal Code

Also use this address as Invoice-from location
Must match your official registered company address

Pay to location (Remit-To)

Ship from location

Advanced invoicing We support integration for invoicing (cXML or SFTP) and plan to use it with CenterPoint Energy

Preferred Invoicing Language

Tax Country/Region

Tax ID

Please provide only tax identification information that is in public domain. Do not provide company internal tax identification numbers or personal identification like social security numbers. Coupa does not accept responsibility for personal information provided by Vendors.

I don't have Tax ID Number

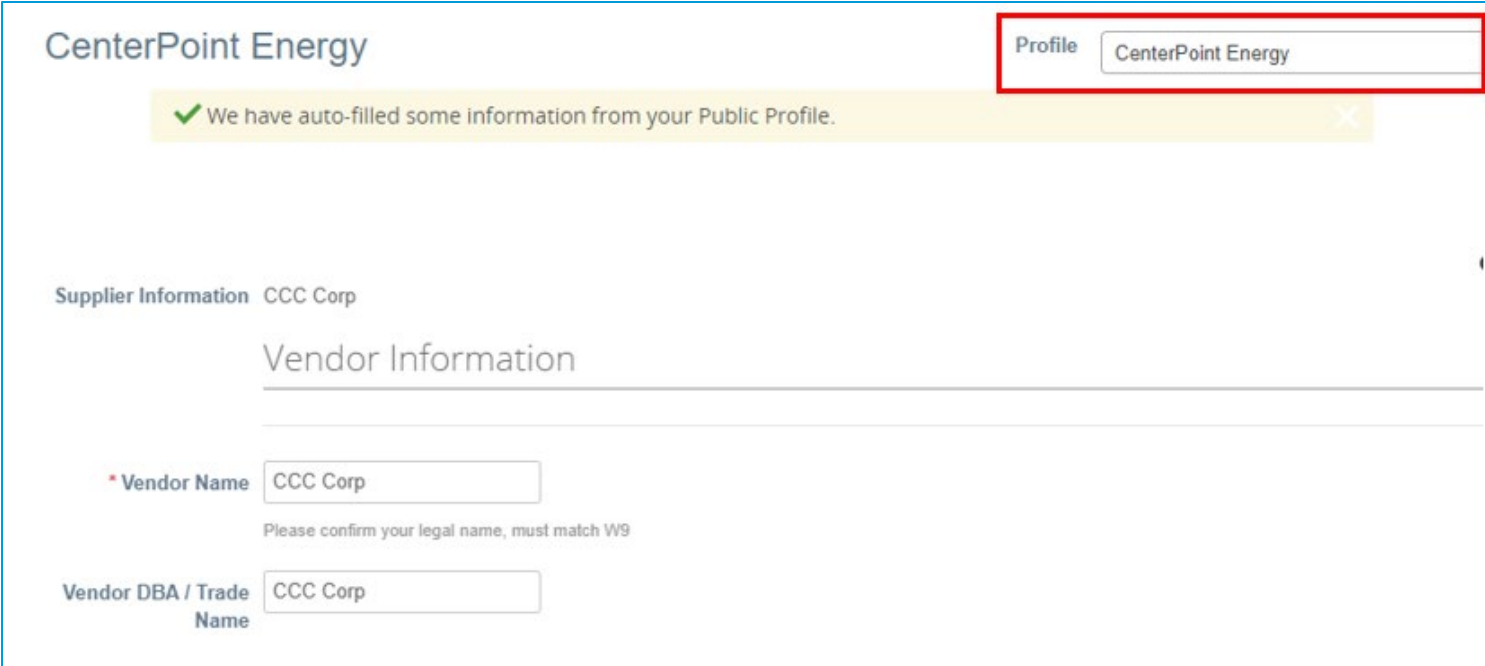
[Add additional tax id](#)

Next

New Supplier Onboarding

After completing the public profile information, the Supplier Response Form will open in order to provide additional information required by CenterPoint Energy.

Suppliers may have multiple customers using the CSP, and the Profile drop-down will toggle between suppliers. Please verify CenterPoint Energy is listed as the Profile.



CenterPoint Energy

Profile CenterPoint Energy

✓ We have auto-filled some information from your Public Profile.

Supplier Information CCC Corp

Vendor Information

* Vendor Name CCC Corp
Please confirm your legal name, must match W9

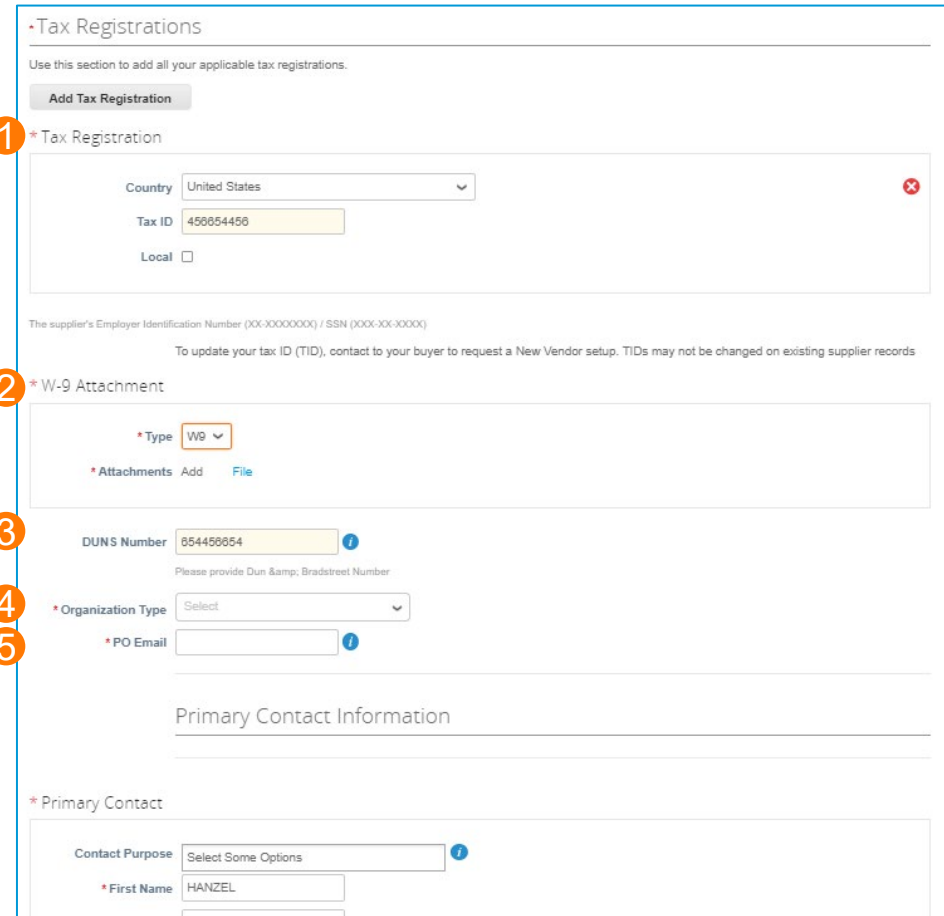
Vendor DBA / Trade Name CCC Corp

New Supplier Onboarding




Complete the form, providing key information needed for CenterPoint Energy’s onboarding process.

This will include company details, tax classification, Tax ID, email (for PO recipient), payment method (ACH, Virtual Card), and other key details.

1. Tax Registration: enter tax ID and country.
2. W-9 Attachment: attach a PDF copy of your W-9.
3. DUNS: enter DUNS number.
4. Organization Type: choose from the options in the drop-down menu.
5. PO Email: enter the email address where POs should be sent. This may be different from the primary contact’s email address.



The screenshot shows a web form titled "Tax Registrations" with the following sections and elements:

- Section 1: Tax Registration** (indicated by a blue circle with the number 1):
 - Country: United States (dropdown menu)
 - Tax ID: 456654456 (text input)
 - Local:
- Section 2: W-9 Attachment** (indicated by a blue circle with the number 2):
 - Type: W9 (dropdown menu)
 - Attachments: Add File (links)
- Section 3: DUNS Number** (indicated by a blue circle with the number 3):
 - DUNS Number: 654456654 (text input)
 - Info icon: 
 - Text: Please provide Dun & Bradstreet Number
- Section 4: Organization Type** (indicated by a blue circle with the number 4):
 - Organization Type: Select (dropdown menu)
- Section 5: PO Email** (indicated by a blue circle with the number 5):
 - PO Email: (text input)
 - Info icon: 
- Section: Primary Contact Information**
 - Primary Contact Information: (text input)
- Section: Primary Contact**
 - Contact Purpose: Select Some Options (dropdown menu)
 - Info icon: 
 - First Name: HANZEL (text input)

Form screenshots continue on the next page.

New Supplier Onboarding

Complete the form, providing key information needed for CenterPoint Energy’s onboarding process.

1. Primary Contact: defaults from the public profile, but should be reviewed for accuracy and updated if needed.
2. Physical Address / Ordering Address: defaults from the public profile, but should be reviewed for accuracy and updated if needed.

Form screenshots continue on the next page.

1 * Primary Contact

Contact Purpose

* First Name

* Last Name

* Email address

* Work Phone
650-555-1212

Mobile Phone
650-555-1212

Fax
650-555-1212

Physical Address / Ordering Address

2 * Physical Address / Ordering Address

Address Purpose

* Region

Country/Region

State Region

State ISO Code

Address Name

* Street Address

Street Address 2

Street Address 3

Street Address 4

* City

* Postal Code

Location Code

New Supplier Onboarding

Payment Information may be selected by the supplier.

Note: If there are provisions in a contract with CenterPoint Energy for payment method, the details entered here must align to that contract.

Payment Information

Choosing Virtual Card will result in more favourable payment terms – fewer days until payment

Changing pay methods from Virtual Card to ACH will lengthen payment terms – additional days until payment

Please do not select the "Check" payment method. This is for internal purposes only. CenterPoint will reject the form back to you if you select Check

*** Payment Method**

Do not select "Check". This is for internal purposes only.

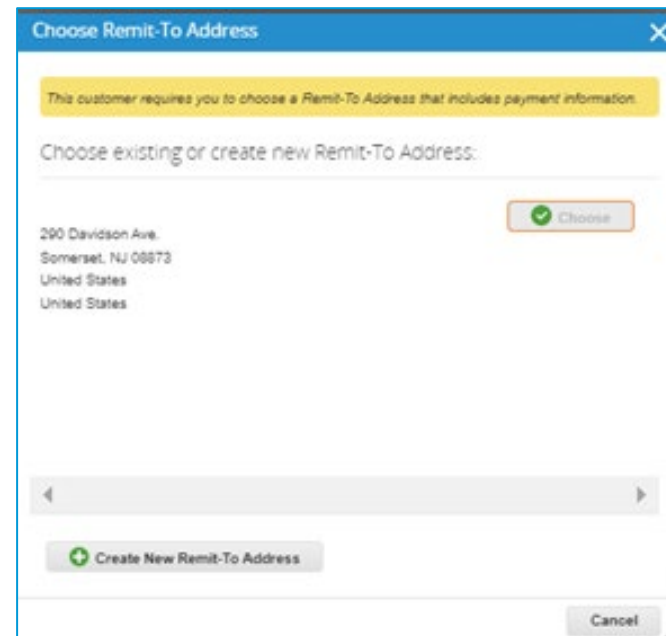
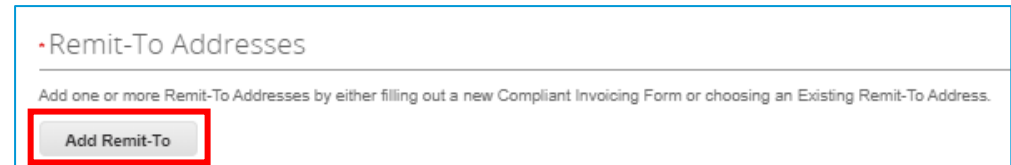
*** Is Payment Method Selected Virtual Card ?** Yes No

Remit to Information

New Supplier Onboarding

To Add a remit-to address, click Add Remit-To and follow the prompts to either provide a new remit-to address or select a remit-to from the existing addresses.

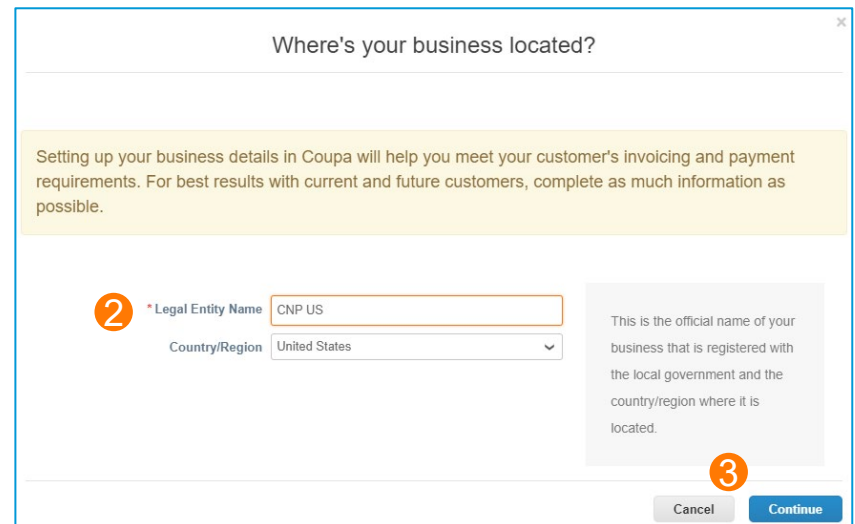
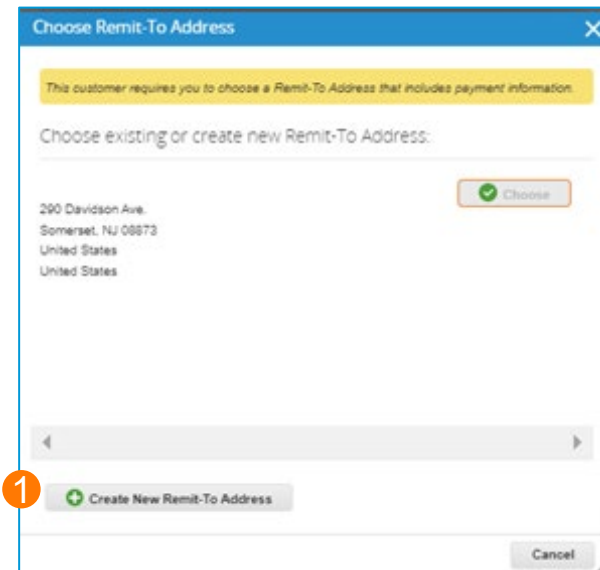
Note: You may add multiple addresses in Coupa, but only the most recently updated address will be used. Remit-to addresses cannot be edited once saved, but a new remit-to can be created instead.



New Supplier Onboarding

For suppliers who will create a new remit-to address,

1. Click **Create New Remit-To Address**. The Where's your business located? page appears.
2. Enter the **Legal Entity** and **Country/Region**.
3. Then, click **Continue**.

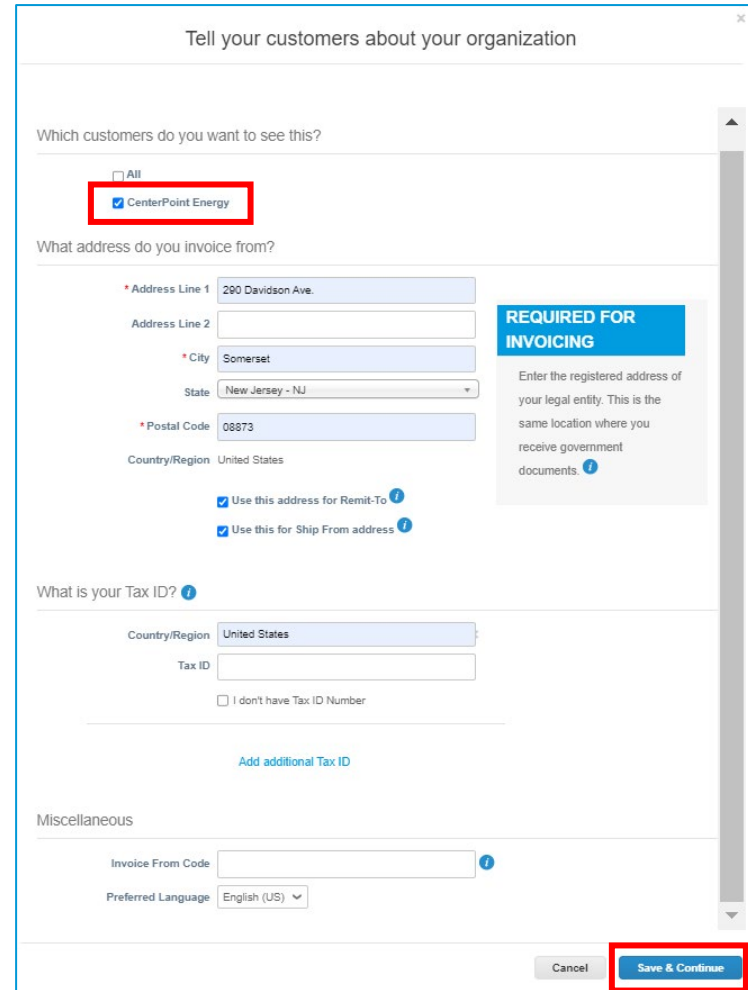


New Supplier Onboarding

On the “Tell your customers about your organization” page, populate all the required fields, marked with a red asterisk (*) and important fields.

Make sure to choose CenterPoint Energy as the customer.

Click **Save & Continue**.



Tell your customers about your organization

Which customers do you want to see this?

All

CenterPoint Energy

What address do you invoice from?

* Address Line 1 290 Davidson Ave.

Address Line 2

* City Somerset

State New Jersey - NJ

* Postal Code 08873

Country/Region United States

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

What is your Tax ID?

Country/Region United States

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

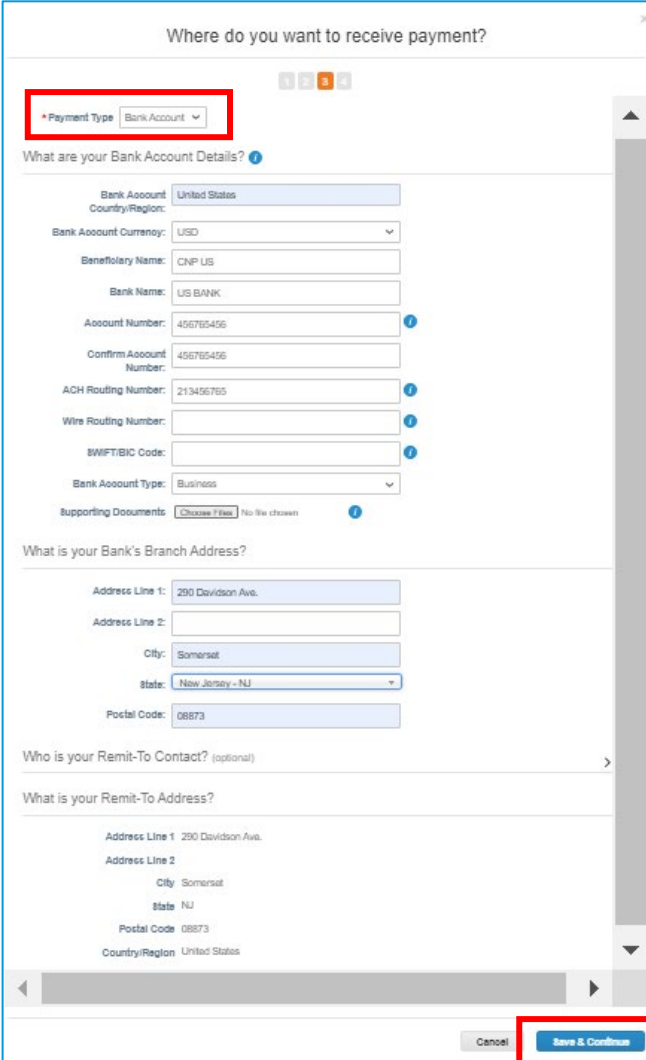
Preferred Language English (US)

Cancel **Save & Continue**

New Supplier Onboarding

On the Payment Type, select “Bank Account” and populate the bank account details and branch address.

Then, click **Save & Continue**.



Where do you want to receive payment?

Payment Type: Bank Account

What are your Bank Account Details?

Bank Account Country/Region: United States

Bank Account Currency: USD

Beneficiary Name: CNP US

Bank Name: US BANK

Account Number: 456765456

Confirm Account Number: 456765456

ACH Routing Number: 213456765

Wire Routing Number:

SWIFT/BIC Code:

Bank Account Type: Business

Supporting Documents: Choose Files No file chosen

What is your Bank's Branch Address?

Address Line 1: 290 Davidson Ave.

Address Line 2:

City: Somerset

State: New Jersey - NJ

Postal Code: 08873

Who is your Remit-To Contact? (optional)

What is your Remit-To Address?

Address Line 1: 290 Davidson Ave.

Address Line 2:

City: Somerset

State: NJ

Postal Code: 08873

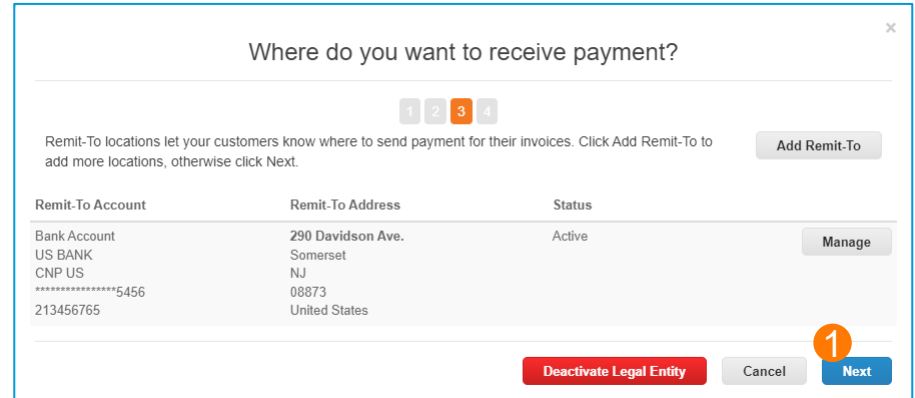
Country/Region: United States

Cancel Save & Continue

New Supplier Onboarding

Details from your remit-to address and ship-from address will default from previous screens.

1. If the appropriate Remit-To Account populates, click **Next**. If not, click **Manage** to add the details.
2. If the appropriate Ship-From address populates, click **Done**. If not, click **Manage** to add the details.
3. After clicking **Done**, the Setup Complete screen will show. Click **Add Now** to return to the supplier information form to complete the remaining fields.



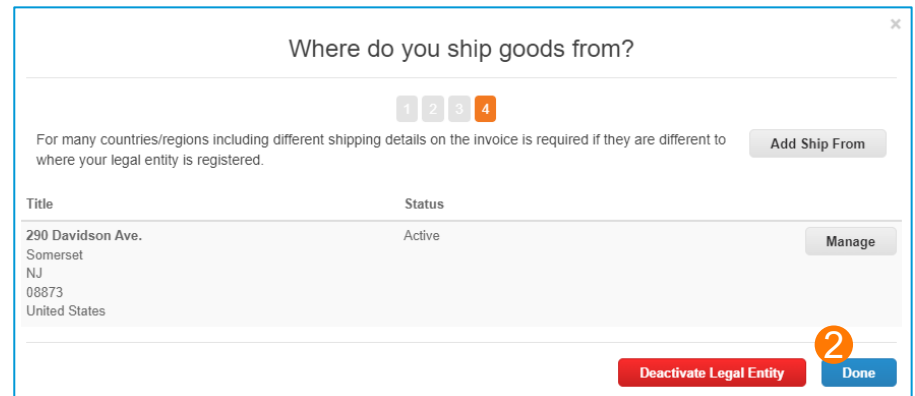
Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account US BANK CNP US *****5456 213456765	290 Davidson Ave. Somerset NJ 08873 United States	Active	Manage

Deactivate Legal Entity Cancel Next



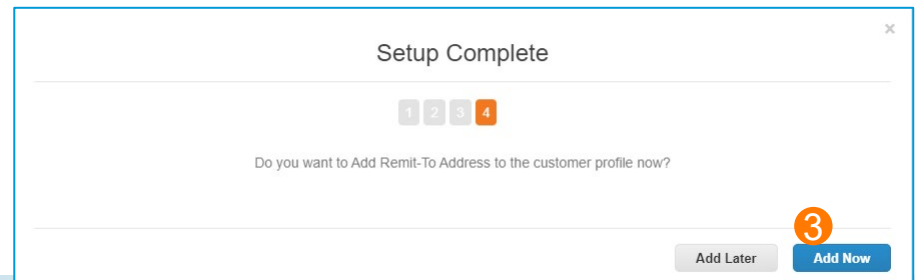
Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
290 Davidson Ave. Somerset NJ 08873 United States	Active	Manage

Deactivate Legal Entity Done



Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

New Supplier Onboarding

After the Remit-To screens are completed, additional fields will show on the form. Populate remaining required information on the Remit to Address section:

1. Remittance Email
2. Financial Contact Name
3. Financial Contact Number
4. Account Type
5. Account Holder Name

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](#)

Remit-To Information

Active: Active ✖

Choosing Virtual Card will result in more favorable payment terms – fewer days until payment.

Address Name:

If you have a P.O. Box, please include the information here.

* Street Address:

Street Address 2:

* City:

* Region:

State Region:

State ISO Code:

* Postal Code:

Bank Information

Bank Name:

Bank Address:

Bank City:

Bank State or Region:

Bank Postal Code:

Bank Country/Region:

Bank Routing Number:

Bank Account Number:

* Remittance Email:

This will be used for remit to summary.

* Financial Contact Name:

* Financial Contact Phone Number:

In XXX-XXX-XXXX format.

Account Type:

Account Holder Name:

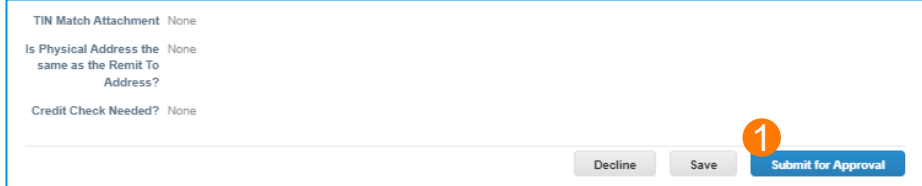
- 1
- 2
- 3
- 4
- 5

New Supplier Onboarding

There will be Internal Only fields at the bottom of the form. These are to be completed by CenterPoint Energy employees when reviewing supplier responses to the rest of the form.

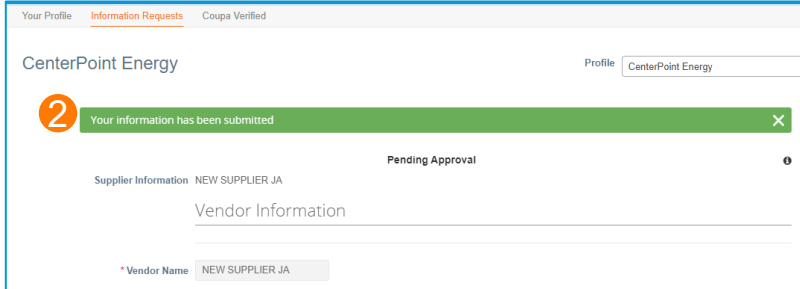
1. Once all fields are complete (barring Internal Only fields), click **Submit for Approval**.
2. Once submitted, the request is automatically sent to CenterPoint Energy for review and approval.
3. The supplier is redirected to their Profile page on the Coupa Supplier Portal, where they can view the profile details submitted on the form.
 - The supplier will also receive an email notification that their information was recently updated and is pending approval.
 - *Note: fields in the Internal Only section will be completed by CenterPoint Energy internal process.*

The supplier can view the status of the submission by going to Information Requests.



TIN Match Attachment None
 Is Physical Address the same as the Remit To Address? None
 Credit Check Needed? None

Decline Save **Submit for Approval**



Your Profile Information Requests Coupa Verified

CenterPoint Energy Profile CenterPoint Energy

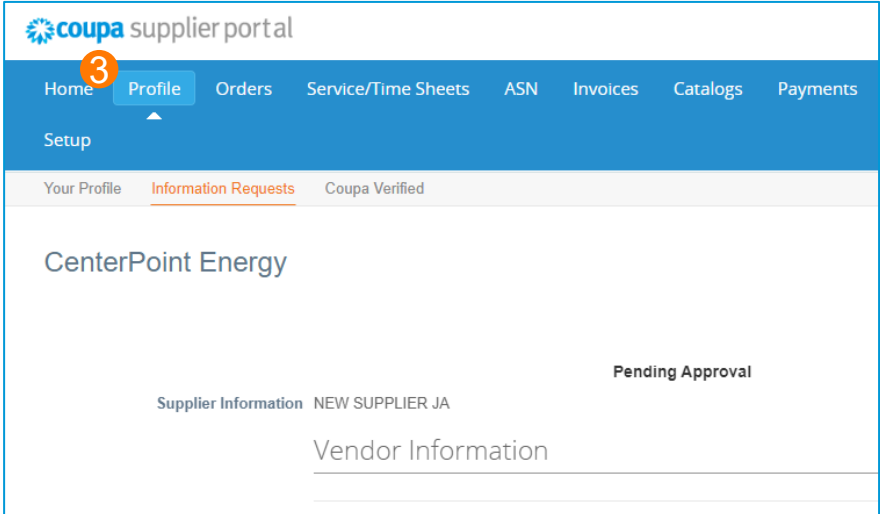
2 Your information has been submitted

Pending Approval

Supplier Information NEW SUPPLIER JA

Vendor Information

* Vendor Name NEW SUPPLIER JA



coupa supplier portal

Home **3** Profile Orders Service/Time Sheets ASN Invoices Catalogs Payments

Setup

Your Profile Information Requests Coupa Verified

CenterPoint Energy

Pending Approval

Supplier Information NEW SUPPLIER JA

Vendor Information

Information Updates for Existing Suppliers

There are two ways that suppliers can update their information for CenterPoint Energy:

- 1.CenterPoint Energy sends a request to the supplier through Coupa.
- 2.The supplier updates the information via the Coupa Supplier Portal without receiving a request.

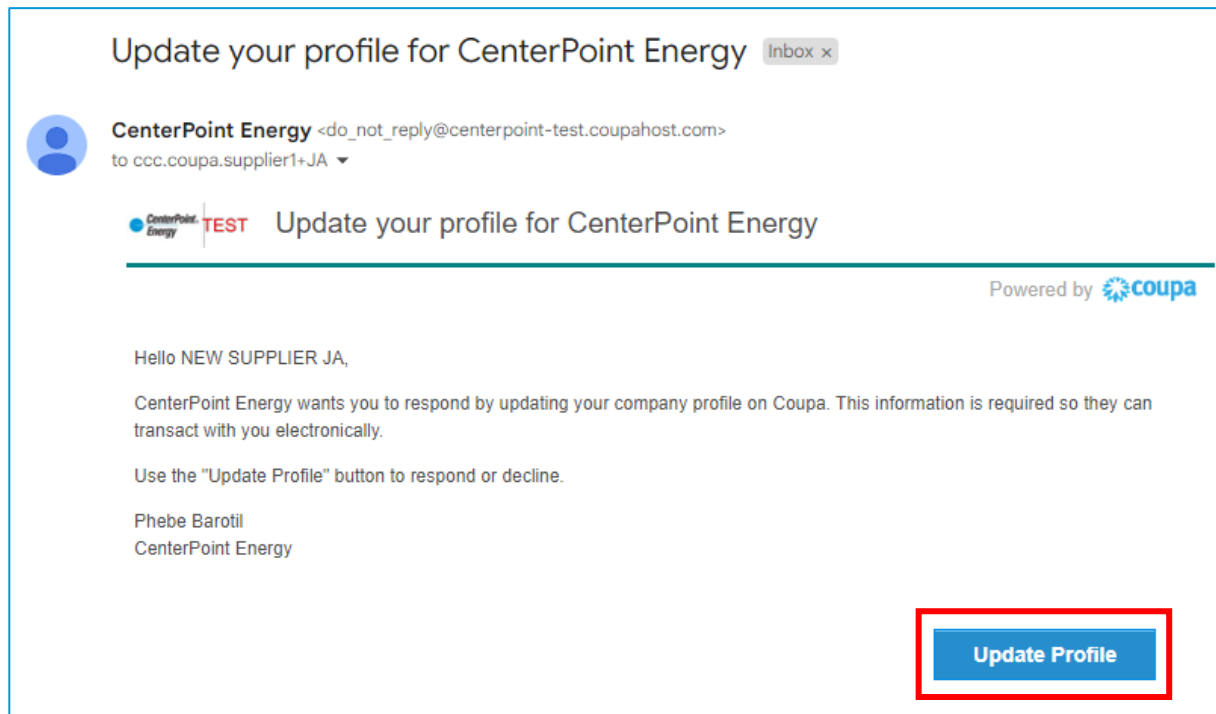
Note: The first time you want to update the information, you must contact CenterPoint Energy to initiate the External Supplier Information Update Form.

Information Updates for Existing Suppliers

CenterPoint Energy Requests Updates through the CSP

You will receive an email notification to update your profile for CenterPoint Energy.

Click **Update Profile** in the email to log in and complete the updates.

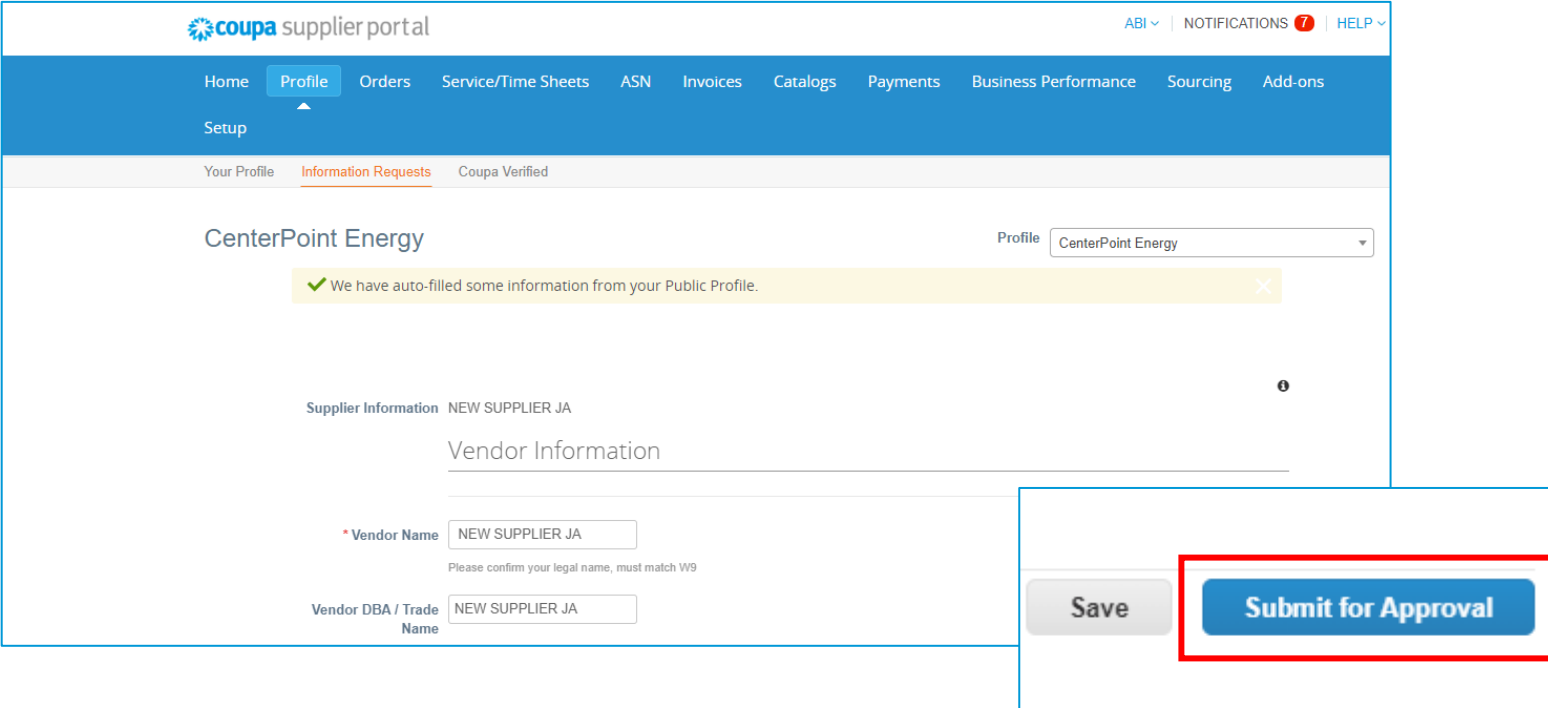


Information Updates for Existing Suppliers

CenterPoint Energy Requests Updates through the CSP

Update the information and once completed, click **Submit for Approval**. The form will have the same fields as the initial request that is sent, shown in previous slides.

The request is automatically sent to CenterPoint Energy for review and approval. Submitted forms will show under **Information Requests**.



The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Profile' tab is active. Below the navigation bar, the breadcrumb trail shows 'Your Profile' > 'Information Requests' > 'Coupa Verified'. The main content area is titled 'CenterPoint Energy' and features a 'Profile' dropdown menu set to 'CenterPoint Energy'. A yellow notification banner states: 'We have auto-filled some information from your Public Profile.' Below this, the 'Supplier Information' section shows 'NEW SUPPLIER JA'. The 'Vendor Information' section contains two input fields: 'Vendor Name' and 'Vendor DBA / Trade Name', both with the value 'NEW SUPPLIER JA'. A note below the 'Vendor Name' field reads: 'Please confirm your legal name, must match W9'. At the bottom right, there are two buttons: a grey 'Save' button and a blue 'Submit for Approval' button, which is highlighted with a red rectangular box.

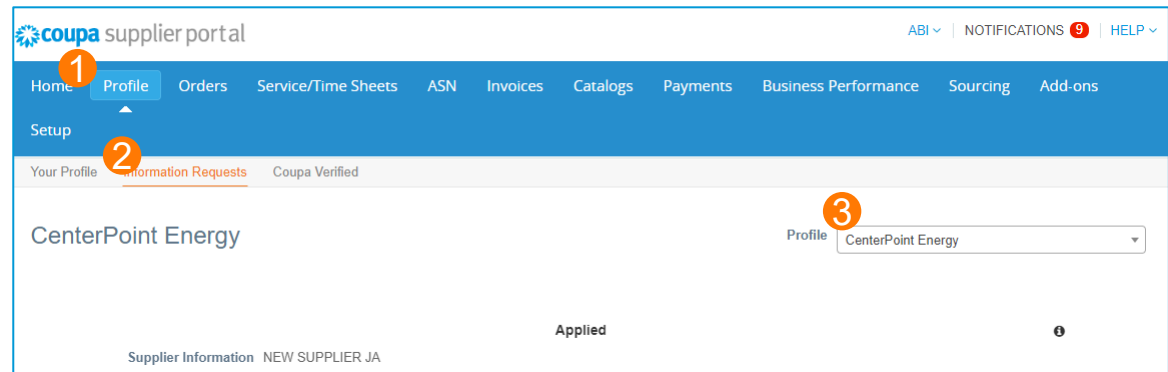
Information Updates for Existing Suppliers

Supplier initiates the information update in the CSP

Note: the first time a supplier wishes to initiate an information update, they must request the form from CenterPoint Energy. For any subsequent update, the form will be available within the CSP.

Once logged in:

1. Navigate to the **Profile** tab.
2. Click on the **Information Requests** sub-tab.
3. Under the **Profile**, select **CenterPoint Energy** to begin the information update you would like to update your record from.

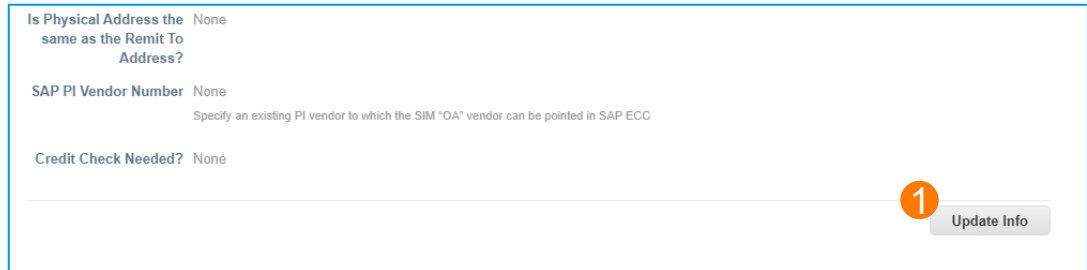


Information Updates for Existing Suppliers

Supplier initiates the information update in the CSP

Complete all the fields that require an update. The fields will be the same as those shown on the new supplier form on the previous slides.

1. Scroll down at the bottom of the page and click **Update Info** to make your changes.
2. Once done with all the updates, click **Submit for Approval**. The request is automatically sent to CenterPoint Energy for review and approval.

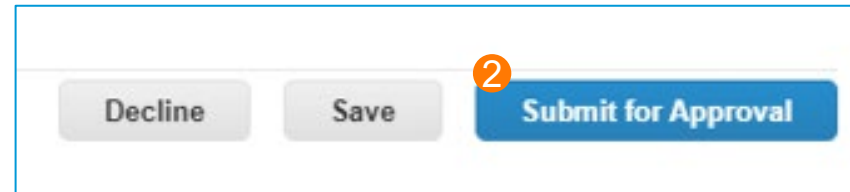


Is Physical Address the same as the Remit To Address? None

SAP PI Vendor Number None
Specify an existing PI vendor to which the SIM "OA" vendor can be pointed in SAP ECC

Credit Check Needed? None

1 Update Info



2 Decline Save Submit for Approval

Note: information updates will also have Internal Only fields. You will not be able to edit these.