

BCG Onboarding Guidelines for LAB Suppliers

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Introduction

As a BCG supplier, we require you to register your company's details on our Coupa Supplier Portal before any invoices can be processed.

Setting up your company information will facilitate the timely processing of invoices.

If you are not already registered as a user of the Coupa Supplier Portal, you will need to register as a user before you can register your company's details. The link provided in your welcome email will take you directly to the registration page.

If you are already a user of the Coupa Supplier Portal, you will need to log in to Coupa via the link provided in your welcome email. Once logged in you will be taken to the BCG Coupa home page where you can register your company's details.

BCG has therefore compiled this user guide to assist you in setting up your company details accurately. Once you have completed your information it must be submitted to the BCG Procurement team. The Procurement team will validate your information and will reach out to you if any discrepancies are identified.

Should you have any queries or require any additional assistance please contact BCG Procurement Support by raising a request at BCGProcPaySupport@bcg.com

Join the Coupa Supplier Portal

The following information needs to be completed so that your details are registered on the Coupa Supplier Portal. The information needs to be completed by the person mandated to act on behalf of the company and, where applicable, the invitation must be forwarded to the correct representative.

If you are the correct company representative, please complete the information below:

Create an Account

Grow your Business on Coupa with a Free Account

*** 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

← Enter the correct Business Name or Legal Entity name.

← Enter the correct email for the company representative.

← Complete your personal details to set up your profile.

← Create and confirm a unique password.

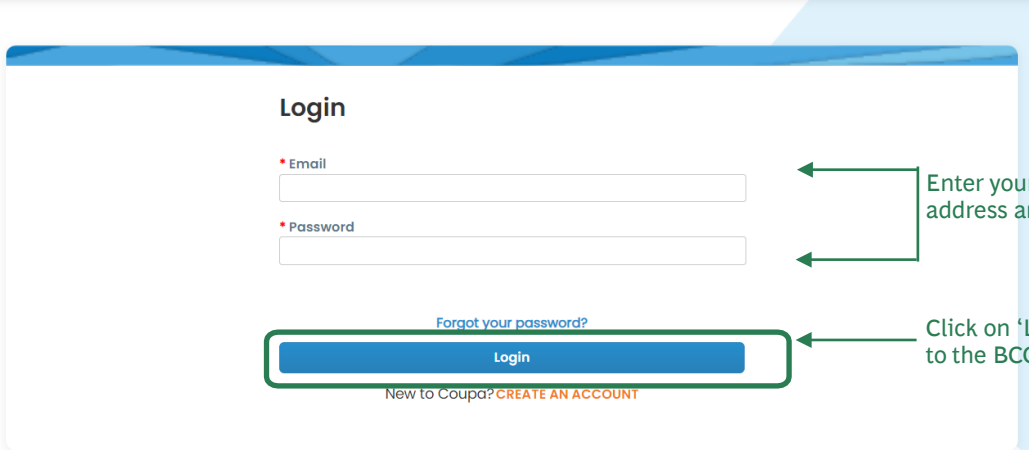
← View and accept the Privacy Policy and Terms of Use.

← Click on 'Create an Account' to send your registration details to BCG.

You (the company representative) will receive an email notification that your request to join the Coupa Supplier Portal has been accepted and will be prompted to complete your customer profile via the link provided.

Log In to the Coupa Supplier Portal

Log in to the Coupa Supplier Portal using your existing email address and password so that you can register your company details as a BCG Supplier.



The screenshot shows the Coupa Supplier Portal login interface. At the top left, the logo reads "coupa supplier portal". The main heading is "Login". Below this, there are two input fields: "Email" and "Password", each with a red asterisk indicating a required field. A blue button labeled "Login" is positioned below the password field. To the left of the "Login" button is a link that says "Forgot your password?". Below the "Login" button is a link that says "New to Coupa? CREATE AN ACCOUNT". Annotations with green arrows point to the input fields and the "Login" button, providing instructions on how to use the page.

Enter your existing email address and password.

Click on 'Log In' to navigate to the BCG Home Page.

Accessing Your User Guides

User guidelines on completing the required information are available via the **Home** tab. Selecting **View All** next to **Announcements** will allow you to access the user guide you are looking for.

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as AARUSHI with 5 notifications. The navigation bar includes Home (highlighted with a green box), Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Business Performance, and Sourcing. Below the navigation bar, the user's profile is displayed as P1 PSC 1908 with a 6% profile progress. The main content area is divided into three sections: Recent Activity, Announcements, and a summary of key metrics. The Announcements section is highlighted with a green box and shows 'No Announcements'. The Recent Activity section shows a request from Boston Consulting Group - LAB PSC 2602 received today. The summary section includes: Two Factor Security (0 of 1 Users), Join Requests (0 Users), Merge Suggestions (0 Duplicates), and Linked Customers (2 Connections).

Complete Your Customer Profile

To complete your customer profile, select **Profile** from the tab at the top of the screen and then select **Information Requests**.

The screenshot shows the Coupa Supplier Portal Profile page for PSC 1908. The navigation bar is the same as in the previous screenshot, but the Profile tab is highlighted with a green box. Below the navigation bar, the user's profile is displayed as PSC 1908 with a 6% profile progress. The main content area is divided into two sections: Company Profile and Information Requests. The Company Profile section includes a message: 'Complete your profile to get discovered by Coupa buyers that are looking for items in your category.' The Information Requests section shows a request from Boston Consulting Group - LAB PSC 2602 requiring additional information to conduct business with you. The profile progress bar is at 6% and the last updated date is 7 days ago. The Edit Profile button is highlighted with a blue box. The bottom of the page shows links for Profile preview, Copy profile URL, and Download Profile as PDF.

Your Company information

Please tell us about your company

The fields marked with red asterisk(*) are mandatory fields.

* Legal Entity Name

Please enter your company's legal name (exactly as it would appear on contracts, articles of incorporation, etc.).

* Trading/Doing Business As(DBA) name

Please enter the name you commonly use for invoicing, if different from the legal entity name below. In case you don't have a different Trading/DBA name, keep this field same as Legal Entity Name.

* Your website URL

Enter your company's website address (e.g. www.bcg.com) LinkedIn Profile or any other social networking web address.

Enter your Legal Entity name. It cannot exceed 40 characters, including spaces. Please note that for US Suppliers this name must be same as that on the W8/9 Form

Enter your 'Doing Business As' name if currently used for invoicing.

Enter your company's URL.

Your Tax and Payment information

Tax Details

* Tax Registration Details I have a VAT ID / Tax ID Services not applicable for VAT / Tax

* Tax Registration Type

* Tax ID

Enter Tax Registration Type and Tax ID

Tax Details

* Tax Registration Details I have a VAT ID / Tax ID Services not applicable for VAT / Tax

* I agree that my invoices to BCG will not carry VAT ID / Tax ID

In case this option is selected and invoices carry VAT ID / Tax ID, they will be rejected

If your services are not applicable for VAT / Tax Ensure you agree that invoices will not carry VAT / Tax

Supplier Contact Information

Please provide the name and contact information of the best person to speak with at your company about your engagement with BCG.

* Primary Contact

Your Primary Contact

* First name

* Surname

* Email address

* Mobile Phone Other

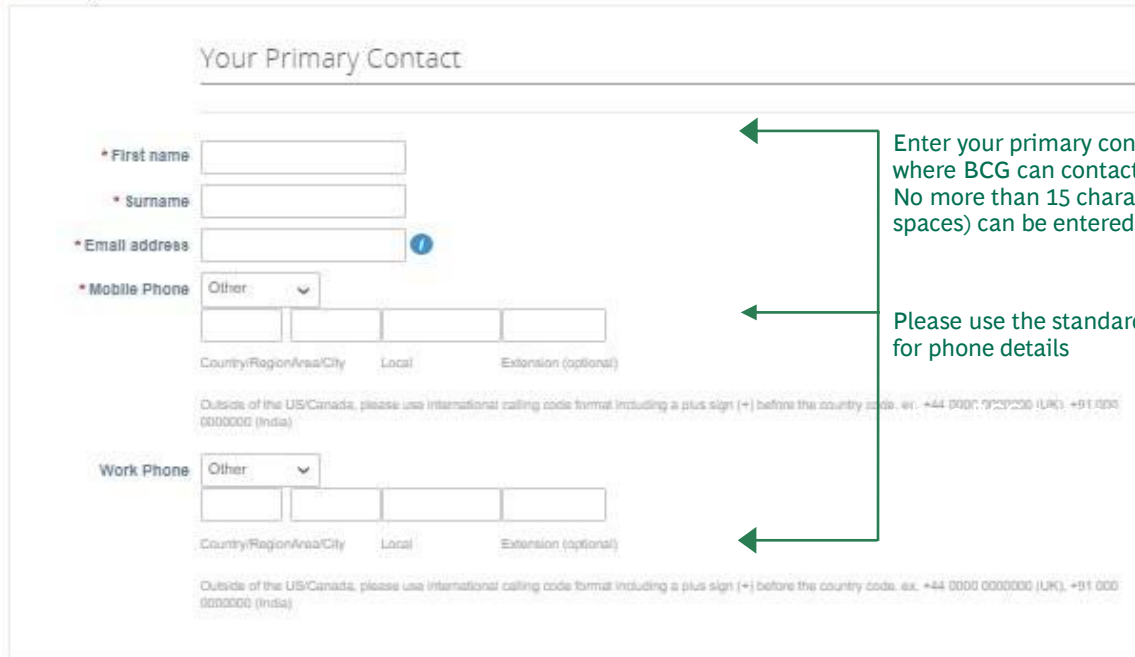
Country/Region/Area/City Local Extension (optional)

Outside of the US/Canada, please use international calling code format including a plus sign (+) before the country code. ex. +44 0000 999999 (UK), +91 000 0000000 (India)

Work Phone Other

Country/Region/Area/City Local Extension (optional)

Outside of the US/Canada, please use international calling code format including a plus sign (+) before the country code. ex. +44 0000 0000000 (UK), +91 000 0000000 (India)



Enter your primary contact details where BCG can contact you if required. No more than 15 characters (including spaces) can be entered in 'First Name'.

Please use the standard country format for phone details

* Supplier Primary Address

Address Purpose Select Some Options

* Region United States

Country/Region None

State Region

State ISO Code

Address Name

* Street Address

Street Address 2

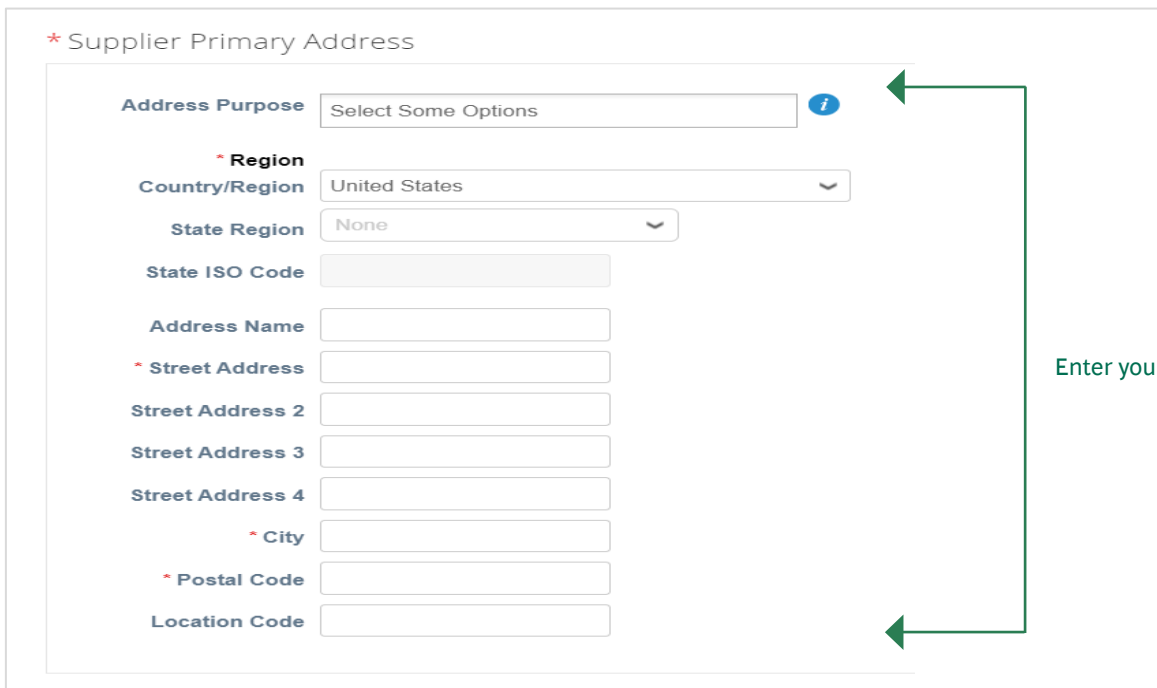
Street Address 3

Street Address 4

* City

* Postal Code

Location Code



Enter your Company's Primary Address

Click the **Add Remit-To** button, the following pop-up will appear:

The actual information required will differ from country to country and will be in line with your country’s regulatory requirements.

Please note that the screens provided in the Remit-To section are examples for guidance purposes only. Should you require any additional assistance please contact BCG Procurement Support by raising a request at BCGProcPaySupport@bcg.com.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name
Country

This is the official name of your business that is registered with the local government and the country where it is located.

Cancel

Continue

Click on **Continue** to capture the rest of the information that is required.

Please ensure that the address details captured are the same that appear on your Invoices.

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

- All
- Boston Consulting Group - Test P SC2
- Boston Consulting Group - Test Supplier
- Boston Consulting Group - Test Global ME1
- Boston Consulting Group - Khushboo Arora

What address do you invoice from?

* Address Line 1
Address Line 2
* City
State
* Post Code
Country/Region

- 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 as where you receive government documents.

What is your Tax ID? ⓘ

Country/Region: United Arab Emirates

VAT ID: [Empty]

I don't have a VAT/GST Number

* Local Tax ID: 890842

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code: [Empty] ⓘ

Preferred Language: English (United Arab Emirates)

Select the country in which you are based.

If you have a VAT ID, please ensure that you enter the correct format, e.g., ESJ66647000.

Dependent on your country, VAT ID may not be mandatory. If you do not have a VAT ID, please check 'I don't have a VAT/GST Number' and enter your Local Tax ID. This could also be your Driver's license number or Passport number

Tax ID and Miscellaneous is not mandatory as it is not required by BCG and will not be utilized.

Where do you want to receive payment?

1 2 3 4

* Payment Type: Address

What is your Remit-To Address?

Address Line 1: Test Street

Address Line 2: [Empty]

City: Dubai

State: [Empty]

Post Code: 7898

Country/Region: United Arab Emirates

Please select **Address** from the three drop-down options as this is the BCG standard payment type.

This information does not need to be completed as the information provided earlier will be pre-populated.

Click on **Save & Continue** to capture the rest of the information that is required.

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	
Address	xxx xxx 123456 India	Active	Manage

Deactivate Legal Entity

Cancel

Next

Please Note: Only one Remit-To Address and Bank Account will be accepted and stored at BCG. Should you need to add additional Remit-To Addresses and/or Bank Accounts, these can be added once you have been onboarded as a BCG Supplier.

You should only select **Deactivate Legal Entity** or **Cancel** if you need to clear the information already recaptured. Please note that these selections will clear the form and all information will need to be completed again?

Click on **Next** to capture the rest of the information that is required.

Where do you ship goods from?

1 2 3 4

For many countries 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	
xxx xxx 123456 India	Active	Manage

Deactivate Legal Entity

Done

This information will be pre-populated and will reflect as an Active status as confirmation that your Remit-To Address is confirmed.

Click on **Done** to capture the rest of the information that is required.

Setup Complete

1 2 3 4

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

Add Later

Add Now

Click on **Add Now** to be redirected to the main form to confirm your Remit-To Address and complete your banking information.

Your Banking Details

Banking Information

* Country where Bank is Located ← Enter the Name of the Country where your bank is situated
Select the country from the dropdown where your bank is located

* Beneficiary Name ← Enter the name of the Account holder to whom payment must be made. No more than 80 characters can be entered, including spaces.
Enter the name of the account holder that your bank account is registered under.

* Bank Name ← Enter the Name of the Bank associated with your account.

* Bank Account Number ← Enter the Bank Account Number to which payment must be credited. No more than 100 characters can be entered, including spaces.

Additional Banking Details

* Please confirm the country where bank is located. ← Enter the Name of the Country where your bank is situated
Please select others if the your Bank country is not available in the list

* Sort Code ← For supplier based out of UK, please enter 6 numeric digit sort code without dashes. For E.g., 000000

* SWIFT Code (BIC) ← Your SWIFT Code will be validated as per your bank. Please ensure that only CAPS are entered. No more than 50 characters can be entered, including spaces.

Banking Supporting Document

Attachments Add File

Please include supporting documentation to confirm your banking information e.g. redacted Bank Statement, Letter from bank etc.

← Add supporting documentation related to the provided banking information

Additional Information

Are you a MSME? Check the MSME box, if you are Medium-sized enterprise.

A MSME (small to medium-sized enterprise) is a supplier with fewer than 250 employees and annual turnover of less than £50,000,000.

DUNS Number Enter the DUNS Number.

* PO Email Enter PO Email address.

If you have a specific Purchase Order email address, please include it here. If not, please copy the Remittance Email.

← Check the MSME box, if you are Medium-sized enterprise.

← Enter the DUNS Number.

← Enter PO Email address.

Supplier Code of Conduct

Do you accept BCG's Code of conduct?

BCG Supplier Code of Conduct represents our core values and applies to all Suppliers providing goods and/or services to BCG. Please attest to accepting BCG's Supplier Code of Conduct by checking the box or provide the latest version of your own

← Either accept BCG's code of conduct or attach your company's code of conduct.

* Please check this box to confirm the accuracy of above information. Any inaccuracies in the information may result in delay of payments.

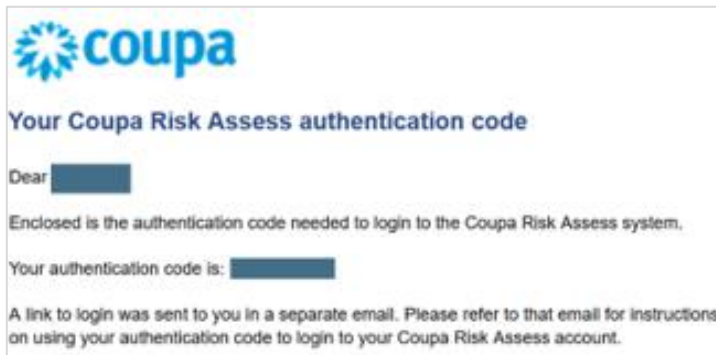
Decline Save **Submit for Approval**

← Finally, please check the box before clicking on review and submitting the form for approval..

Click on **Submit for Approval** to submit your information to the BCG Procurement team. The Procurement team will validate your information and will reach out to you if any discrepancies are identified.

Should you have any queries or require any additional assistance please contact BCG Procurement Support by raising a request at BCGProcPaySupport@bcg.com.

After BCG has conducted an initial due diligence, suppliers may receive additional supplier risk questionnaires



1. Access to the supplier risk questionnaire(s):
 1. **For new suppliers**, open the activation email and complete the Coupa Risk Assess dashboard setup instructions
 2. **For returning suppliers**, login to the Coupa Risk Assess dashboard by clicking the link in the activation email
2. On the main dashboard in Coupa Risk Assess, select the Show Me All button on the blue Evaluations tile to view all evaluations pending supplier action. You may be assigned more than one questionnaire, so this will allow you to view all pending items.
3. Answer all mandatory questions, which will have an asterisk.
 - If you try to submit the evaluation without completing a required question, you will be given an error warning.
4. When you are finished, select the blue **Submit** button.
5. On the next screen, select the green **Submit** button.