



RFS



Coupa Supplier Portal (CSP)

Supplier User Guide (full version)



Coupa Supplier Portal User Guide (full version)

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SIM – Coupa Introduction



Coupa is a cloud-based platform, design specially for buyers and suppliers to collaborate.

NSW Rural Fire Service uses Coupa as their chosen platform for Supplier Management. You must use this electronic system so NSW RFS can trade with you as your customer, and if we need you to update your company details.

This guide will step you through the 2 ways you can set up your company when NSW RFS sends you a request, this will ensure we correctly create your vendor account.

These are 2 ways you can use the Coupa System to provide your details :-

1. **Join and Respond** via the Coupa Supplier Portal (CSP) - (slides 9 - 45)
2. **Respond without Joining** the CSP – (slides 46 - 62)

We recommend completing this process on a laptop or PC for a better experience. Using a mobile phone limits the page views, and some of the links in the form may not work.

Please note that the Coupa Supplier portal is FREE, and RFS doesn't require you to be verified via the Coupa Verify.

Info regarding Firewalls and Spam filters

In some instances, Coupa Supplier Portal emails can be blocked by some supplier's firewall and spam filters being used. It is recommended that if suppliers are having issues receiving our emails to consult with their IT departments to ensure that emails from the following domains are not blocked and marked as safe and added to the allowlist.

do_not_reply@rfsnsw.coupahost.com

and

@rfsnsw.coupahost.com

SIM – Coupa Introduction



You will receive an email from the NSW RFS requesting your supplier information. This email will come from NSW Rural Fire Service do_not_reply@rfsnsw.coupahost.com

Please note that the Coupa Supplier portal is **FREE**, and RFS doesn't require you to be verified via the Coupa Verify.

At this point you will need to decide if you :-

1. **Join and Respond**
2. **Respond without Joining**

Once decided then please click on the button

Join and Respond

via the Coupa Supplier Portal (CSP)

Select this option if you want to register as a RFS supplier whilst also maintaining your public profile and look for extra customers that Coupa have. You will create your business account / profile and can then use various option eg view PO's, create invoices, track payments. Most of your data will be prefilled into the SIM form which is then sent to RFS. After registering, you will have access to your profile.

Respond without Joining

without registering for CSP (SAN)

Select this option if you want to fill in the application form without creating a CSP profile to become a RFS supplier. Takes you directly to the "Information Request" form by a one-time link – you can complete your company details without any further registration. If you supply on a one-off basis or are a small business, it might make more sense to select this.

A screenshot of an email from the NSW Rural Fire Service. The email is titled "NSW Rural Fire Service Profile Information Request - Action Required". It addresses the recipient as "Hello Supplier," and explains that NSW Rural Fire Service uses Coupa as their chosen platform for Supplier Management. The email states that the recipient must use this system so NSW RFS can trade with them as a customer, and they need to update their company profile. It offers two ways to use the Coupa System: 1. "Join and Respond" via the Coupa Supplier Portal (CSP), or 2. "Respond Without Joining" the CSP. The email also mentions that joining allows for easier updates and access to purchase orders, invoices, and SMS alerts. It provides instructions on how to forward the registration to another person and offers links for further help and information. At the bottom of the email, there are two buttons: "Join and Respond" and "Respond Without Joining".

Note – to update any additional company details after this registration process with RFS you will need a form sent to you. Please advise procurement@rfs.nsw.gov.au or finance@rfs.nsw.gov.au



Coupa Supplier Portal (CSP)

SIM – Coupa Introduction (Status)



Supplier Status – Supplier can have the following statuses. What does the status mean?

STATUS	DESCRIPTION
New	The form has not been opened or completed yet
Draft	The form was saved as a draft by the user (supplier) and has not been submitted as yet.
Pending Approval	The form is awaiting approval by the required RFS approvers
Pending Manual Application	The form has been approved but has not been applied yet
Cancelled	The form was cancelled because the form expired or a new version of a form was sent to the supplier (when a new form is sent, existing forms in New/Draft status are cancelled)
Declined	The form was declined by the supplier. Communicate with your supplier and resend the form for them to complete.
Applied	The form was automatically applied because the Auto Approve option was enabled when the form was created. Upon approval, the form was automatically applied to update the supplier's information in your instance.

















SIM – Coupa Key Terminologies

Key Terminologies used in the Coupa system

Term	Description
Purchase Order (PO)	A legal & commercial document issued by RFS (Customer) to a supplier as a commitment to purchase goods or services in agreed upon type, quantity and prices.
PO Acknowledgement	For a supplier to confirm receipt of the PO, after which the effectiveness of this PO will be acknowledged
Invoice	Billing document issued to RFS, stating financial obligations for goods received or service provided
Dispute Invoice	An invoice rejected and sent back by RFS (customer), for supplier to re-submit the new invoice
Credit Note	An invoice with negative value, to offer a credit to the RFS (customer) or to resolve the issue
Remit-to accounts	Account where RFS pays for their invoices to your company
Payment Term	The expected duration between the date your customer received the invoice and sent payment. Payment terms are set up while onboarding
Supplier Actionable Notifications (SAN)	SAN is when you act on an email without logging into the CSP. This gives you the ability to act directly from your email inbox when you receive a PO. With this option, you will receive an email notification for every PO so you do not need to register or log anywhere to acknowledge it or create an invoice
Supplier Information Management (SIM)	Coupa's software is called SIM (Supplier Information Management) which allows suppliers to easily initiate updates when they're receiving a PO, sending an invoice, or using the supplier portal

SIM – Coupa Icons

Main icons used in Coupa

ICON	ACTION / FUNCTION	ICON	ACTION / FUNCTION
	Print		Expand Table
	Edit		Collapse Table
	View		Information
	Save		Add Item
	Delete		Resolve
	Void (cancel)		Mark as read
	Create (flip PO into) an invoice		Calendar
	Create credit note		Secure Information - not published to your public profile

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

When RFS sends you an invite to join Coupa you are given the option to “Join and Respond”. These are the steps to follow to complete the form when you join the Coupa Supplier Portal - CSP.

When you click the “Join and Respond” button, you will be taken to the **Create an Account**

Join and Respond

Your CSP account is based on a specific email address. For the initial set up this is the email that you provided to RFS in your first discussion.

A screenshot of an email from NSW Rural Fire Service (RFS) titled "NSW Rural Fire Service Profile Information Request - Action Required". The email content includes a greeting "Hello Supplier," followed by an explanation that NSW Rural Fire Service uses Coupa for Supplier Management and needs the supplier to update their company profile. It lists two options: "1. Join and Respond via the Coupa Supplier Portal (CSP), or 2. Respond Without Joining the CSP". Below this, it explains that joining allows for easier updates and provides more features like purchase orders and real-time alerts. It also includes links for "Doing Business with the NSW RFS" and "For Suppliers". At the bottom, there are two buttons: "Join and Respond" (highlighted with a red box) and "Respond Without Joining".

Note – RFS recommend completing this process on a laptop or PC for a better experience. Using a mobile phone limits the page views, and some of the links in the form may not work.

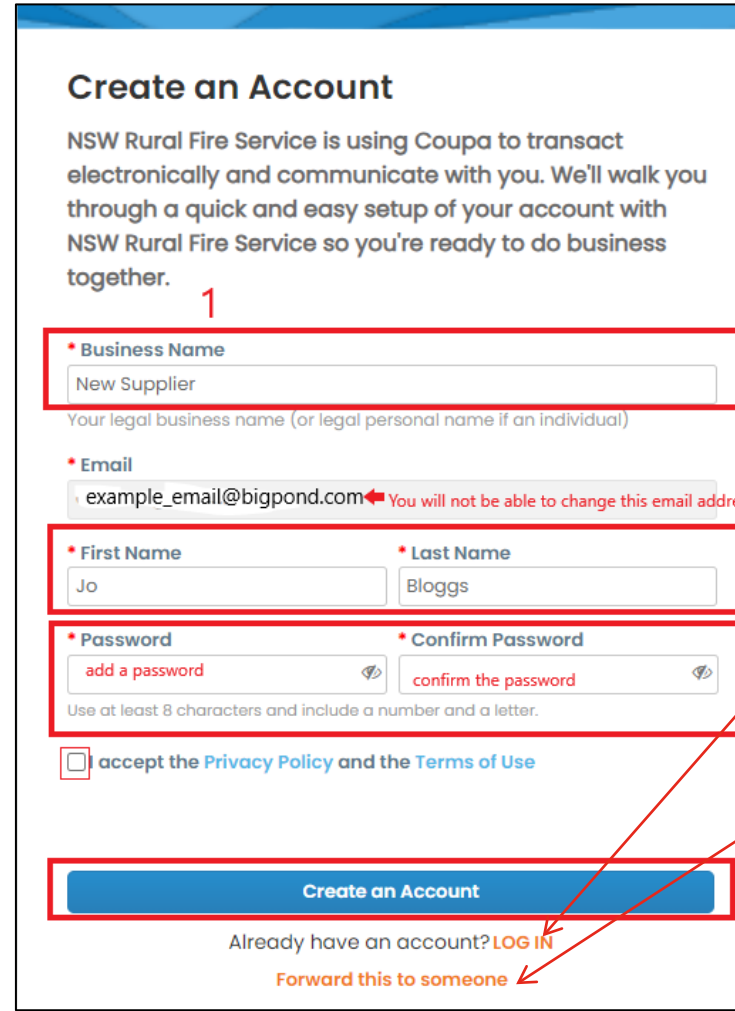
SIM – Filling in the form via CSP

(Registering for the CSP)

“Join and Respond”

Under **Create an Account** section - First step of joining the CSP is to create an Account - (mandatory fields are marked with *)

1. **Create an Account – Business name, First name & Last Name** will be prepopulated from the New supplier request that an RFS member instigated. Please change this if incorrect. You will not be able to change the **Email**. Add a **password** and then **confirm password**. Accept the **privacy policy** and **terms of use**. Once information has been entered then click the **Create an account** button.
2. If you already have an account, click the **Log In**
3. If you are not the correct person to register for your company, click **“Forward this to someone”** instead.



Create an Account

NSW Rural Fire Service is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with NSW Rural Fire Service so you're ready to do business together.

1

* **Business Name**
New Supplier
Your legal business name (or legal personal name if an individual)

* **Email**
example_email@bigpond.com You will not be able to change this email address

* **First Name** * **Last Name**
Jo Bloggs

* **Password** * **Confirm Password**
add a password confirm the password
Use at least 8 characters and include a number and a letter.

accept the Privacy Policy and the Terms of Use

Create an Account

Already have an account? **LOG IN**

Forward this to someone

Already have an account? **LOG IN** 2

Forward this to someone 3

Note – Once you have created an account and signed in for the first time, Coupa offers to take you on a tour of the CSP. We highly recommend you take this tour in order to gain valuable insight into the functionality provided.

SIM – Filling in the form via CSP

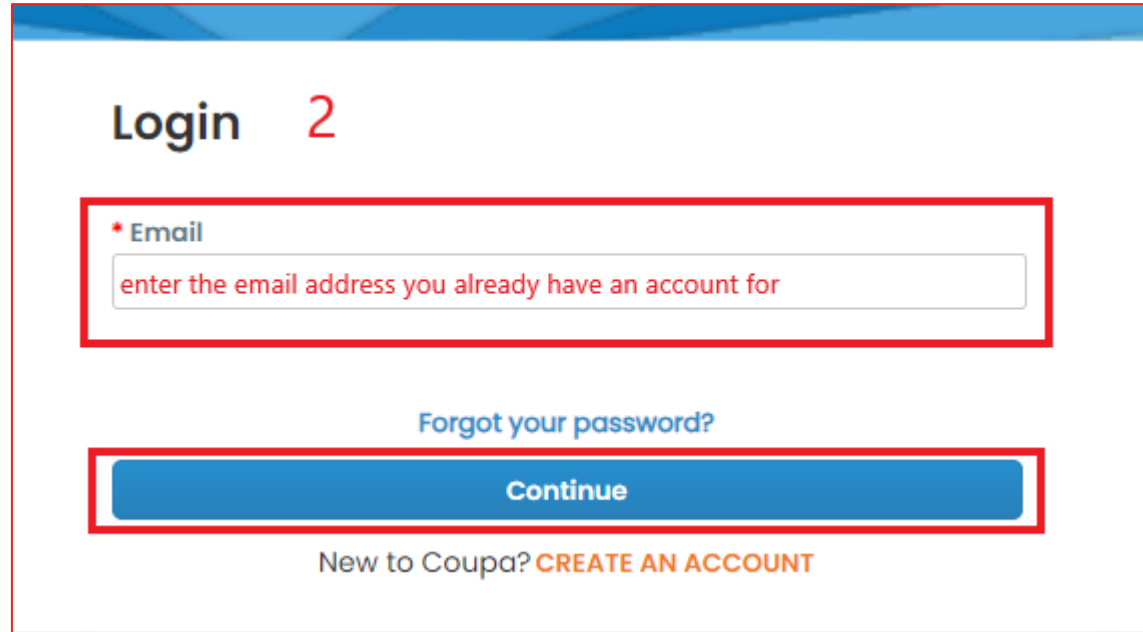
(Registering for the CSP)

“Join and Respond”

Under **Login** section - Already have an Account

2. If you already have an account, click the **Log In**. This will take you to the Login screen – enter the **Email** address you already have an account for then click the **Continue** button

Already have an account? **LOGIN** 2



The screenshot shows the Coupa Login interface. At the top, it says "Login 2". Below this is a red-bordered box containing an email input field with the placeholder text "enter the email address you already have an account for". Below the input field is a blue link that says "Forgot your password?". At the bottom of the red-bordered box is a blue "Continue" button. Below the entire red-bordered box is the text "New to Coupa? CREATE AN ACCOUNT".

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Forward this Invitation** section to someone else – (mandatory fields are marked with *)

3. If you are not the correct person to register for your company, click **“Forward this to someone”** instead. This will take you a screen called **Forward This Invitation** add in the email of the correct person and click the **forward** button

Forward this to someone 3

Forward This Invitation

NSW Rural Fire Service is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with NSW Rural Fire Service so you're ready to do business together. 3

* Email

add email @bigpond.com

Forward

SIM – Filling in the form via CSP

(Registering for the CSP)

“Join and Respond”

Under **Email Verification** section - after creating an account, you will need to fill in the **Verification Code**

4. **Email Verification** - after creating an account, you need to fill in the Verification Code to verify your email. A one-time code will be sent to the email address which was provided.

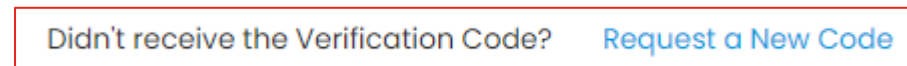
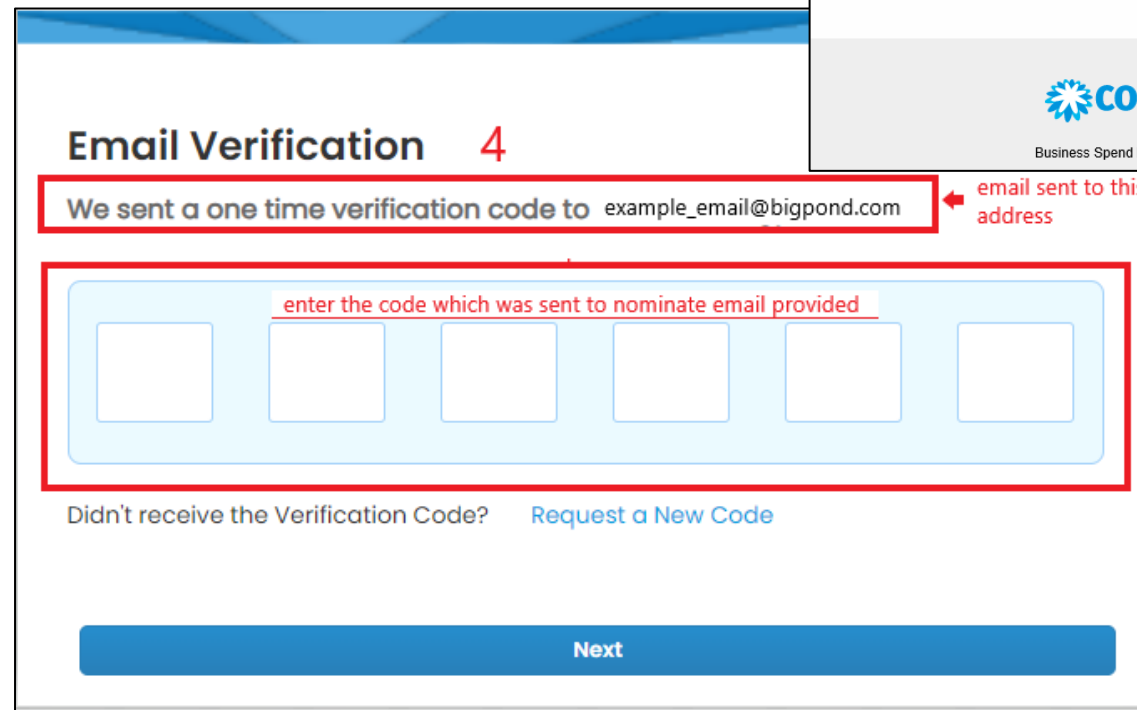
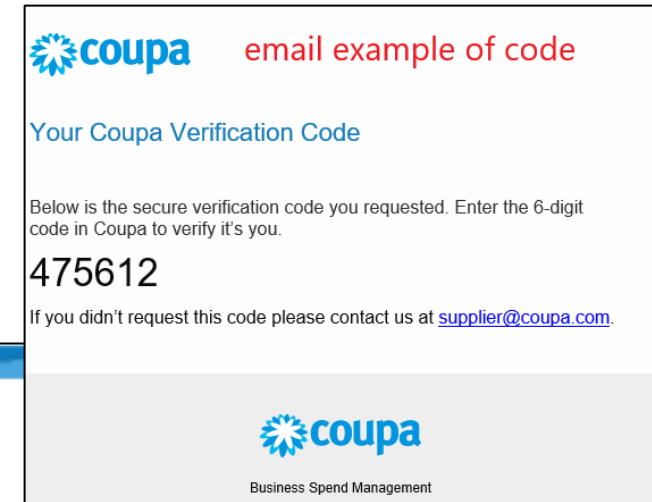
Email will come from Coupa Supplier Portal

do_not_reply@rfs.coupahost.com

subject **Your Coupa Verification Code**

Enter the code and then click the **Next** button

Note – you can **Request a new code** if you didn't receive it



SIM – Filling in the form via CSP

(Registering for the CSP)

“Join and Respond”

Under Secure your Payment Information section. Two-Factor Authentication

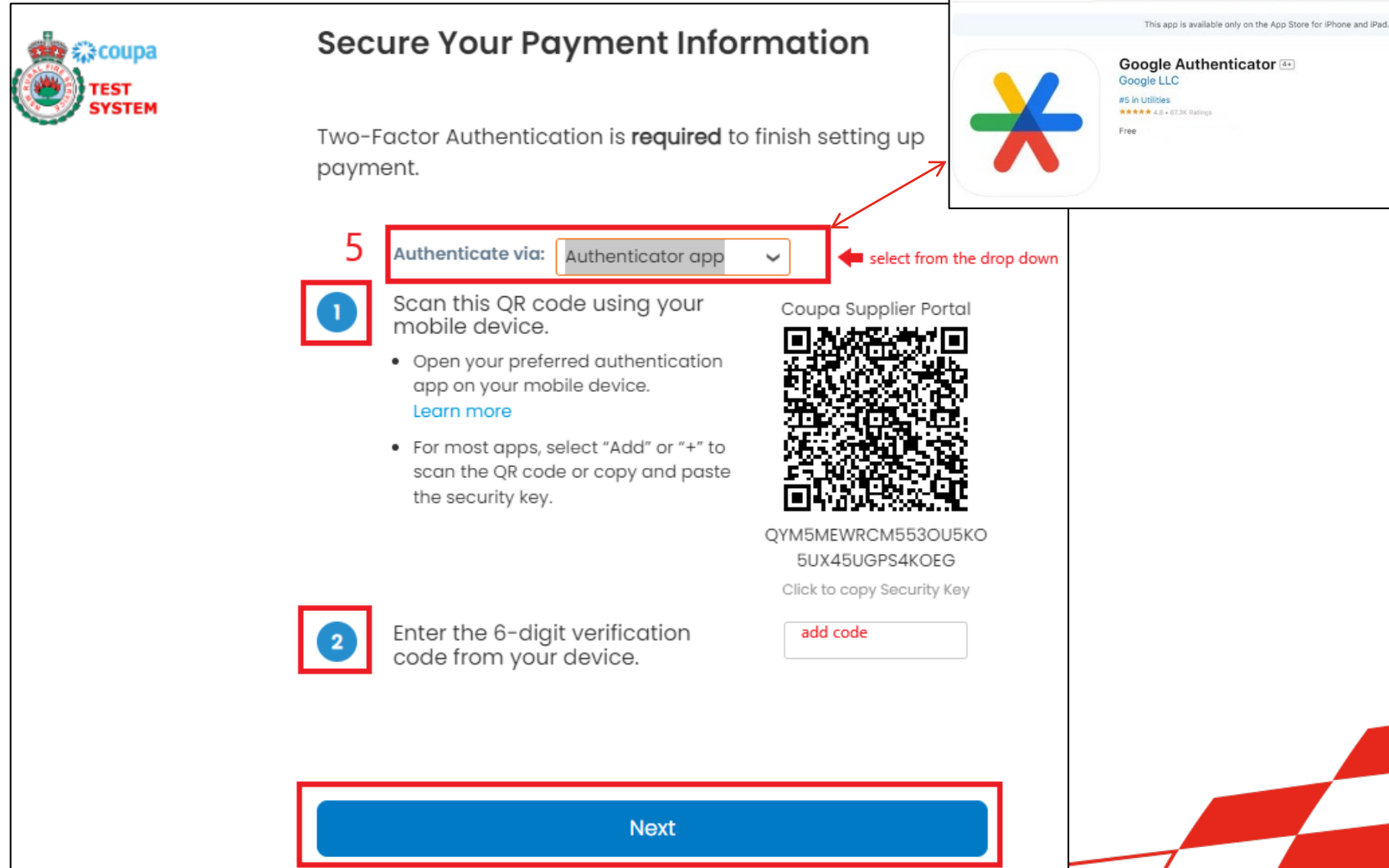
5. Two-Factor Authentication is required to finish setting up payment.

Option 1 Authenticator app

Point 1. Scan the QR code using your mobile phone under **authenticate via : authenticator app** after selecting from the drop down.

Point 2. enter the 6-digit verification code received to your phone.

Then click **Next** button.



Secure Your Payment Information


Two-Factor Authentication is **required** to finish setting up payment.

5 **Authenticate via:** Authenticator app select from the drop down

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. [Learn more](#)
- For most apps, select “Add” or “+” to scan the QR code or copy and paste the security key.

Coupa Supplier Portal



QYM5MEWRM553OU5KO
5UX45UGPS4KOEK
Click to copy Security Key


add code

2 Enter the 6-digit verification code from your device.

Next

App Store Preview Example of one of the authenticators available

This app is available only on the App Store for iPhone and iPad.



Google Authenticator (4.5)
Google LLC
#5 in Utilities
★★★★★ 4.5 • 81.3K Ratings
Free

SIM – Filling in the form via CSP

(Registering for the CSP)

“Join and Respond”

Under **Secure your Payment Information** Section.
Two-Factor Authentication

6. Two-Factor Authentication is required to finish setting up payment.

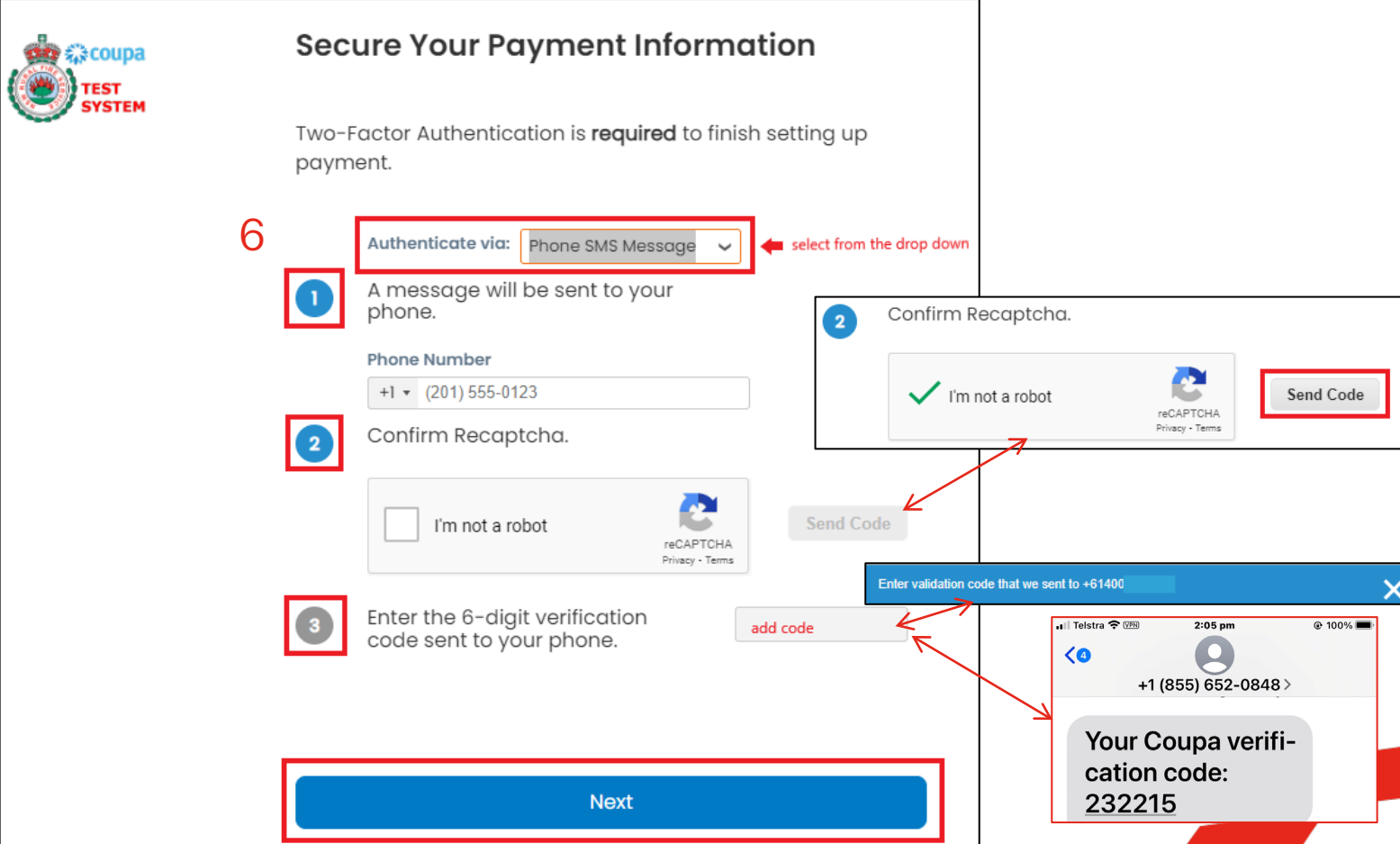
Option 2 **Phone SMS Message**

Point 1. Message sent to your phone via SMS add your mobile phone under **authenticate via : phone SMS message** after selecting from the drop down.

Point 2. Confirm re Captcha, once verified click **send code** button

Point 3. enter the 6-digit verification code received to your phone.

Then click **Next** button.



Secure Your Payment Information

Two-Factor Authentication is **required** to finish setting up payment.

- 6 **Authenticate via:** Phone SMS Message
- 1 A message will be sent to your phone.
Phone Number: +1 (201) 555-0123
- 2 Confirm Recaptcha.
 I'm not a robot
- 3 Enter the 6-digit verification code sent to your phone.

Enter validation code that we sent to +61400

Next

Mobile Phone Screenshot: Your Coupa verification code: 232215

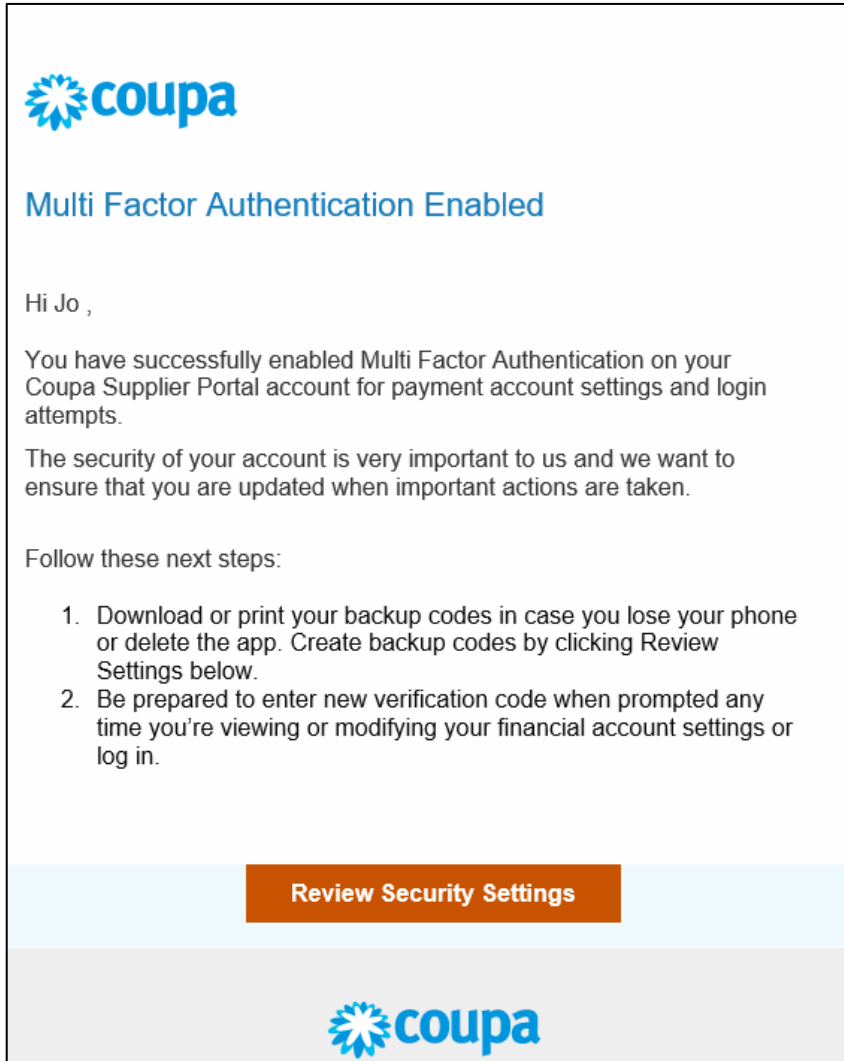
SIM – Filling in the form via CSP

(Registering for the CSP)

“Join and Respond”

Under Multi Factor Authentication Enabled section

- 7. Multi Factor Authentication Enabled**
You will receive an email advising the Multi Factor authentication has been enabled.
Email will come from do_not_reply@rfsnsw.coupahost.com
subject : Multi Factor Authentication enabled
Follow the steps to review security setting.



The screenshot shows an email from Coupa. At the top is the Coupa logo. Below it, the subject line reads "Multi Factor Authentication Enabled". The body of the email starts with "Hi Jo," followed by a message: "You have successfully enabled Multi Factor Authentication on your Coupa Supplier Portal account for payment account settings and login attempts." Below this, it states: "The security of your account is very important to us and we want to ensure that you are updated when important actions are taken." It then says "Follow these next steps:" and lists two instructions: 1. Download or print your backup codes in case you lose your phone or delete the app. Create backup codes by clicking Review Settings below. 2. Be prepared to enter new verification code when prompted any time you're viewing or modifying your financial account settings or log in. At the bottom of the email content is a blue button with the text "Review Security Settings". The footer of the email contains the Coupa logo.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Emergency Recovery Code section

8. Emergency Recovery Codes

this is the only way to restore access if you lose access to your authenticating device or app

Print/Download or Copy these codes. Then click **Next**

Note – It is suggested that you save a copy of these codes somewhere safe but accessible

8i. You can also retrieve your **Emergency Recovery codes** under **My Account**, click in the top right-hand corner of the homepage next to notifications then **Security & Multi Factor Authentication** this will show **Recovery codes** and **Regenerate Recovery Codes**.

8 Emergency Recovery Codes

Emergency Recovery codes are the only way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.
Save your recovery codes somewhere safe but accessible.

w8g6	TcR.	fQlu*
_z7E	Po8u.	luKl

example only

Print Download Copy

These codes were generated on February 14, 2024

Next

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Your Contact Information section (mandatory fields are marked with *)

9. Your Contact Information :- First/Last Name will appear prepopulated, this can be changed.
10. Phone Number – from the drop down select 61 for eg Australia then add your number.
11. Country/Region – from the drop down select eg Australia
12. Address Line 1 – start to type your address and autocomplete will display a list of addresses – select your address
City/State/Postal Code – this will prepopulate once you have selected your Address Line 1
click **Next** once done

The screenshot shows the 'Your Contact Information' form with the following fields and annotations:

- 9**: First Name (Jo) and Last Name (Bloggs) fields. An annotation 'prepopulated' points to the Last Name field.
- 10**: Phone Number field with placeholder 'enter your phone numbe here'.
- 11**: Country/Region dropdown menu. An inset shows the dropdown list with 'Australia +61' selected and highlighted.
- 12**: Address Line 1 field with placeholder 'Start typing in your address, autocomplete will display suggested addresses - select your address from the list'. An inset shows the autocomplete list with '4 Murray' selected. An annotation 'prepopulated once street address is added' points to the City, State, and Postal Code fields below.

At the bottom of the form are 'Next' and 'Skip for Now' buttons.

SIM – Filling in the form via CSP

(Registering for the CSP)

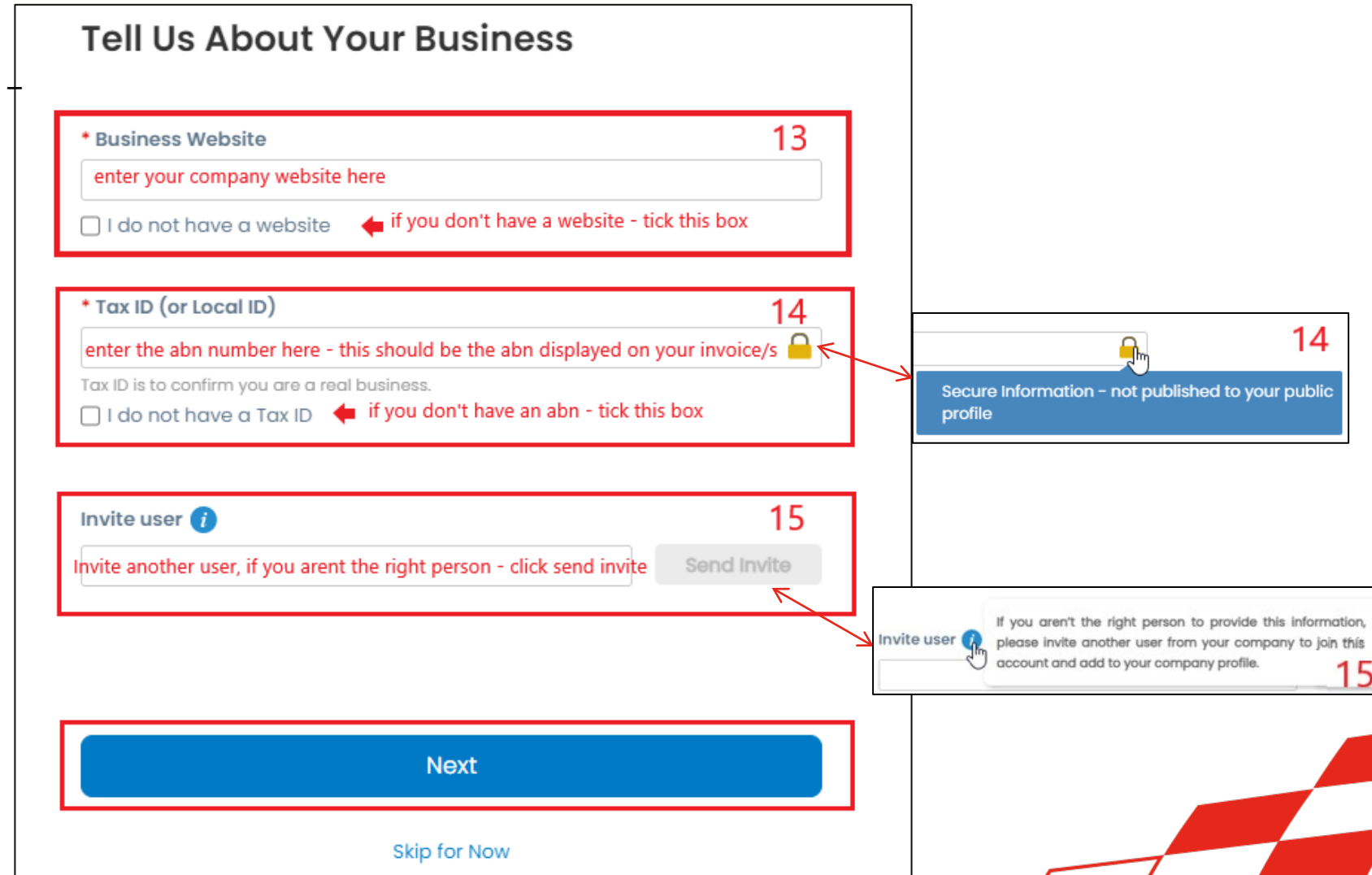
“Join and Respond”

Under Tell us about your Business section (mandatory fields are marked with *)

- 13. Tell us about your Business :-
Business Website – if you have a company website please enter here, otherwise tick the I do not have a website box
- 14. Tax ID – entered your abn number, otherwise tick I do not have a Tax ID box

Note – the padlock means this is secure and will not be made public to your public profile on Coupa

- 15. Invite User – if you aren't the right person, invite another user from your company by clicking the Send Invite
Then click Next



The screenshot shows a form titled "Tell Us About Your Business" with several sections:

- Section 13: Business Website** (marked with a red asterisk). It contains a text input field with the placeholder "enter your company website here" and a checkbox labeled "I do not have a website". A red arrow points to the checkbox with the text "if you don't have a website - tick this box".
- Section 14: Tax ID (or Local ID)** (marked with a red asterisk). It contains a text input field with the placeholder "enter the abn number here - this should be the abn displayed on your invoice/s" and a yellow padlock icon. Below the field is the text "Tax ID is to confirm you are a real business." and a checkbox labeled "I do not have a Tax ID". A red arrow points to the padlock icon with the text "if you don't have an abn - tick this box".
- Section 15: Invite user** (marked with an 'i' icon). It contains a text input field with the placeholder "Invite another user, if you aren't the right person - click send invite" and a "Send Invite" button.
- Section 14 (continued): Secure Information**. A blue bar with a yellow padlock icon and the text "Secure Information - not published to your public profile". A red arrow points from the padlock icon in the Tax ID section to this bar.
- Section 15 (continued): Invite user**. A blue bar with an 'i' icon and the text "If you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile." A red arrow points from the "Send Invite" button in the previous section to this bar.
- Next Button**: A large blue button labeled "Next".
- Skip for Now**: A blue link labeled "Skip for Now".

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Confirm Invoice – From Location** section – (mandatory fields are marked with *)

16. **Confirm Invoice – From Location**
Country/Region & Address will prepopulate from “Your contact” details page but if different address you will be invoicing RFS from then enter it here.
17. **Tax Country/Region** – leave as Australia unless overseas. Add in your ABN number.
18. **Another opportunity is given to Invite User** – if you aren’t the right person, invite another user from your company by clicking the **Send Invite**
Then click **Next**

Confirm Invoice-From Location

This is the main address of your registered business or the registered entity you will be invoicing your customer from.

* Country/Region
Australia

* Address Line 1
100 Pacific High address you are invoicing RFS from

* City State * Postal Code
North NSW 2060

Advanced Invoicing

Invoice-From Code

Recommended if you plan to use with NSW Rural Fire Service in integration for invoicing (cXML or SFTP).

* Preferred Invoicing Language
English (Australia)

Tax Country/Region * ABN
Australia enter abn number

I don't have ABN Number

Invite user Send Invite

Additional Tax ID

Next

Skip for Now

invite user If you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Confirm Pay-To Location (Remit-To)** Same as Invoice-From Location section – (mandatory fields are marked with *)

19. Confirm Pay-To Location (Remit-To)

This is the address that RFS will send your payment to, remittance address.

No changes are needed if same as invoice address.


Click **Next**


20. If different then click the down arrow next to **Same as Invoice – From Location** and change.

See next page

21. Another opportunity is given to **Invite User** – if you aren't the right person, invite another user from your company by clicking the **Send Invite**

Confirm Pay-To Location (Remit-To) 19
This is the address your customer will use to send your payment, remittance address.


Same as Invoice-From Location 20  ← click the down arrow & change your selection


* Country/Region
Australia 

* Address Line 1
100 Pacific Highv...

* City State * Postal Code
North NSW 2060

Advanced Invoicing
Recommended if you plan to use with NSW Rural Fire Service in integration for invoicing (cXML or SFTP).

Invite user  21

invite user  If you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile. 21

SIM – Filling in the form via CSP

(registering for the CSP)



“Join and Respond”

Under **Confirm Pay-To Location (Remit-To)** Add **New Pay-To Location** section – (mandatory fields are marked with *)

22. Confirm Pay-To Location (Remit-To)

Add New Pay-To Location

If address is different to invoice address for remittance, then selection **Add New Pay-To Location**. In **Address Line 1** add the remittance address

23. Advanced Invoicing wording will change to Pay-to (Remit-To) Code once you have selected Add New Pay-To Location

24. Another opportunity is given to Invite User – if you aren't the right person, invite another user from your company by clicking the **Send Invite**

Confirm Pay-To Location (Remit-To)
This is the address your customer will use to send your payment, remittance address.

22 Add New Pay-To Location

23 if different address for remittance, select this from drop down

* Country/Region
Australia

* Address Line 1
add different remittance address here

* City State * Postal Code

Advanced Invoicing
Pay-To (Remit-To) Code this will automatically populate **23**
Recommended if you plan to use with NSW Rural Fire Service in integration for invoicing (cXML or SFTP).

24 Invite user

invite user
if you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile. **24**

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Confirm Ship-From Location** section – (mandatory fields are marked with *)

25. Confirm Ship-From Location

Same as Invoice-From location

This address is your warehouse location if different from invoice location.

No changes are needed if same as invoice address. Click **Next**

26. If different then click the down arrow next to **Same as Invoice – From Location** and change.

See next page

27. Another opportunity is given to **Invite User** – if you aren't the right person, invite another user from your company by clicking the **Send Invite**

Confirm Ship-From Location 25

This is usually your warehouse location.

Same as Invoice-From Location 26

Country/Region: Australia

Address Line 1: 100 Pacific High

City: North State: NSW Postal Code: 2060

Advanced Invoicing

Invite user 27

Next

click the down arrow & change your selection

Same as Invoice-From Location 26

Same as Pay-To Location

Add New Ship-From Location

invite user 27

If you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Confirm Ship-From Location**
Add New Ship-From Location section –
(mandatory fields are marked with *)

28. Confirm Ship-From Location

Add New Ship-From Location

If address is different to invoice address for shipping, then selection **Add New Ship-To Location**.
In **Address Line 1** add the new ship address

29. Advanced Invoicing wording will change to Ship-From Code

once you have selected **Add New Ship-From Location**

30. Another opportunity is given to Invite User – if you aren't the right person, invite another user from your company by clicking the **Send Invite**

Confirm Ship-From Location
This is usually your warehouse location.

Add New Ship-From Location 28

* Country/Region
Australia

* Address Line 1

* City State * Postal Code

Advanced Invoicing
Ship-From Code 29
Recommended if you plan to use with NSW Rural Fire Service in integration for invoicing (cXML or SFTP).

Invite user i 30 Send Invite

Next

Invite user i If you aren't the right person to provide this information, please invite another user from your company to join this account and add to your company profile. 30

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Additional information section

31. Additional Information

Before RFS can do business with you, we require some additional information.

Click the **Take Me There** button and you will be directed to the **Supplier Information update** form.

32. If you click **Skip for Now** this will take you to the portal homepage and we won't be able to capture this information and you will need to navigate back to this form.

NSW Rural Fire Service requires some additional information

This information must be provided before you can do business with NSW Rural Fire Service.

Take Me There

31

Skip for Now

32

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Information Update – Supplier details** section – (mandatory fields are marked with *)

Note – some info will be prefilled from your Coupa Account set up

Supplier Information Update form, so that RFS can capture your Company name, contact details, address location & bank details so we can set up a vendor. Please complete all mandatory information.

Supplier Details :-

- 33. **Entity Name** – enter the Entity name that appears in the ABN lookup for your company
<https://abr.business.gov.au>
- 34. **Company/Business Name** – enter the business name that appears in the ABN lookup (if you don't have one enter the Entity name here as well).
- 35. **Industry** – this will be completed by RSP, generally this is Private Sector.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Information Update – Supplier Contacts & address** section – (mandatory fields are marked with *)

Note – some info will be prefilled from your Coupa Account set up

Supplier Contacts & Address

- 36. **PO Email** – enter the email address you would like PO's from RFS sent to
- Primary Contact :-**
- 37. **Contact Purpose** – click on the drop down to select an option
- 38. **First name** – enter the primary contact first name (main contact/verified admin)
- 39. **Surname** – enter the primary contacts surname
- 40. **Primary contact email** – enter the email address who is the main contact (verified admin)

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

Supplier Contacts & Address

*** PO Email**

email address RFS will send PO to 36

This is where POs will be sent, which can be the same or different from primary contact and/or remittance email address.

*** Primary Contact**

The primary contact is the person responsible for sole representative on behalf of your company – the main contact for the application.

Contact Purpose

Other x 37

*** First Name**

primary contacts first name 38

*** Last Name**

primary contacts surname 39

*** Primary Contact Email**

main (verified admin) contact email 40

Contact Purpose

- Accounting 37
- Diversity
- Executive
- Legal
- Other
- Procurement
- Sales
- Service Desk
- Sourcing

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Supplier Information Update – Supplier Contacts & address section – (mandatory fields marked with *)

Note – some info will be prefilled from your Coupa Account set up

Supplier Contacts & Address

41. Mobile & Work Phone Number –

change the default from US/Canada to “other” to enter the phone number.

First box – country code eg 61

Second box – area code eg 2

Third box – local or mobile number

Phone numbers – follow an international standard for text boxes

Mobile Phone

US/Canada

click on the down arrow to select other

• Change the default to “Other” to enter Australian phone numbers.
• First Box - country code, e.g. “61” (digits only, no + required).
• Second Box - area code, e.g. “2” for NSW (no leading zero).
• Third Box - local number (for mobiles, no leading zero.)

Work Phone

US/Canada

click on the down arrow to select other

Phone numbers – follow an international standard for text boxes **41**

Mobile Phone example only

Other

Country/Region Area/City Local Extension (optional)

• Change the default to “Other” to enter Australian phone numbers.
• First Box - country code, e.g. “61” (digits only, no + required).
• Second Box - area code, e.g. “2” for NSW (no leading zero).
• Third Box - local number (for mobiles, no leading zero.)

Work Phone eg NSW area code example only

Other

Country/Region Area/City Local Extension (optional)

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Supplier Information Update – Supplier Contacts & address section – (mandatory fields are marked with *)

Note – some info will be prefilled from your Coupa Account set up

Supplier Contacts & Address

42. Additional contacts – if you have more than one contact at your company and would like to list them then please complete this section.

43 Add contact – you can click the add contact button to add more

44. Red Cross - If you don't have any additional contacts then click on the red cross to remove this section

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

Contacts

Add one or more Contacts.

Add Contact 43

Additional Contacts

Additional contacts are the second point of contact for business work/department purposes e.g. accounts, procurement, PO. If you don't have any additional contacts, please click the red cross on the right to remove this. 44

Contact Purpose

Select Some Options 42

First Name

Last Name

Contact Email

Phone numbers – follow an international standard for text boxes

Mobile Phone

US/Canada 650-555-1212

Work Phone

US/Canada 650-555-1212

Fill in the details of the additional contact, you can add extra by clicking on the "Add Contacts" button eg Sales, Accounting, Procurement etc

click on the down arrow to select other

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Supplier Information Update – Supplier Contacts & address section – (mandatory fields are marked with *)

Note – some info will be prefilled from your Coupa Account set up

Supplier Address

- 45. **Address Purposes** – this field is not mandatory, but you can select an option from the drop down
- 46. **Region** –
 - I. **Country/Region** – select the country from the drop down
 - II. **State Region** – select the state from the drop down. State ISO Code will automatically populate when the state is selected.
- 47. **Address** – enter your **street address** you can carry over into street address 2,3,4 if needed
- 48. **City/Postal Code** – enter the suburb and post code for your location

The screenshot shows the 'Supplier Address' form in the CSP. It includes a success message at the top: 'We have auto-filled some information from your Public Profile.' The form fields are as follows:

- Address Purpose:** A dropdown menu with '45' next to it. A callout box shows the options: Branch, Franchise, HQ, Other Address, Service Centre, Warehouse.
- Region:** A section containing:
 - Country/Region:** A dropdown menu with '46' next to it. A callout box shows a list of countries including Australia, Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Australia (highlighted), Austria, and Azerbaijan. A callout '46i.' points to this list.
 - State Region:** A dropdown menu with '46ii.' next to it. A callout box shows a list of Australian states and territories including New South Wales - NSW (highlighted), Australian Capital Territory - ACT, Northern Territory - NT, Queensland - QLD, South Australia - SA, Tasmania - TAS, Victoria - VIC, and Western Australia - WA.
 - State ISO Code:** A text field containing 'AU-NSW'.
- Address Name:** A text field.
- Street Address:** A text field containing '100 Pacific High' with '47' next to it.
- Street Address 2, 3, 4:** Empty text fields.
- City:** A text field containing 'North Syd' with '48' next to it.
- Postal Code:** A text field containing '2000'.
- Location Code:** An empty text field.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Payment Details – Remit-To Addresses** section – (mandatory fields are marked with *)

Note – some info will be prefilled from your Coupa Account set up

49. **Supplier Payment Details – “YES”**, if you are a new supplier then you must click **yes** to add bank account details. This will then display the **Remit-To Addresses** section. Click **Add Remit-To** button
50. If you provided this info during the CSP account setup then click the **Choose** button to select the default remit-to address. (We cannot make payment without this).
51. **Payment Details – “NO”**, only click **no action** if you are an existing supplier and don’t need to update bank details

Supplier Payment Details

* Do you need to update your banking details?

Yes - Add / Update bank account details **49 YES**

No Action

All new suppliers must select Yes to provide bank details for EFT payment.

Please click "Add Remit-To" to add your bank account details.

*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

Choose Remit-To Address

Choose a Remit-to Location below - Recommended

It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.

Choose existing or create new Remit-To Address:

100 Pacific High **50** **Choose**

North Syd NSW 2060
Australia
Australia (12345678912)

Check that this is the correct remit to-address & abn

←

+ Create New Remit-To Address

Cancel

Supplier Payment Details

* Do you need to update your banking details?

Yes - Add / Update bank account details

No Action **51 NO**

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Payment Details – Bank Details** section – (mandatory fields are marked with *)

52. New Supplier- If you are a New supplier, please enter your remittance details in the form.

- **Remittance email** – this is where RFS will send payment advice when making EFT payment
- **Bank Name** – enter the name of the bank that your account is held with
- **Account Name** – enter the account holders name that appears in your bank details
- **Bank account Number** – enter the account number of where the funds will be deposited
- **BSB Number** – enter the BSB number that identifies your banks branch
- **Branch Name** – enter if known the location
- **Bank Country/Region** – country the bank is located generally Australia

*Remit-To Addresses **52**

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

* Bank Details

If you are a **New Supplier**, please enter your remittance details in the form below.

* Remittance Email ← enter email address for remittance advice
This is where RFS will send payment advice when making an EFT payment.

* Bank Name ← Fill in the name of the Financial institution you bank with eg CBA (Commonwealth bank)

* Account Name ← enter account name registered with your bank which appears on the bank evidence to be provided

* Bank Account Number ← enter account number (up to 9 digits)
Australian Bank Account Numbers have a maximum of 9 digits

* BSB Number ← enter the BSB number that identifies your banks branch (6 digits)
Please enter your 6 digits BSB number without "-"

Branch Name ← not mandatory but can be completed if known

* Bank Country/Region ← click the drop down and select Australia overseas select the country location

Note – Bank details will be encrypted (masked) once form has been approved by RFS.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Payment Details – Bank Details** section – (mandatory fields are marked with *)

53. **Existing Supplier**- If you are an Existing supplier and need to provide new remittance details.
54. Click the **red cross** on the right to delete this existing info and then click **Add Remit-To** to enter new remittance details
55. Then click **Add Remit-To** which will bring up the bank details fields for you to provide your new details

Note – Bank details will be encrypted (masked) once form has been approved by RFS.

*Remit-To Addresses **53**

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 **55**

* Bank Details

click on the "x" to get rid of old bank details page → **54** ✖

If you are an Existing Supplier and like to provide a New Remittance, please click the red cross on the right to delete this existing one and then click Add Remit-To above to enter your new remittance details.

* Bank Details **55** after clicking "Add Remit-to" the bank details fields will display

If you are an Existing Supplier and like to provide a New Remittance, please click the red cross on the right to delete this existing one and then click Add Remit-To above to enter your new remittance details.

* Remittance Email **55** ← enter email address for remittance advice
This is where RFS will send payment advice when making an EFT payment.

* Bank Name ← Fill in the name of the Financial institution you bank with eg CBA (Commonwealth bank)

* Account Name ← enter account name registered with your bank which appears on the bank evidence to be provided

Bank Account Number **55** ← enter account number (up to 9 digits)
Australian Bank Account Numbers have a maximum of 9 digits.

* BSB Number **55** ← enter the BSB number that identifies your banks branch (6 digits)
Please enter your 6 digits BSB number without "00"

Branch Name ← not mandatory but can be completed if known

* Bank Country/Region ← click the drop down and select Australia

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Supplier Payment Details – Bank Supporting Document section – (mandatory fields are marked with *)

56. Banking Supporting Document : Attachment – To verify the bank details entered into the form. We require the following documentary evidence of your banking details, **this must show**

- *Bank name/logo*
- *Account name*
- *Account Number*
- *BSB number*

Please click “File” and attach the evidence (preferably in pdf format)

*Banking Supporting Document 56

*Attachments

Add File

Please click "File" to provide one of the following as documentary evidence of your banking details, showing Bank Name, Account Name, BSB, and Account Number: A copy of a Bank Deposit Slip, OR Bank Statement, OR Internet Banking Screenshot - omitting balances.

Please click "File" to provide one of the following as documentary evidence of your banking details, showing Bank Name, Account Name, BSB, and Account Number: A copy of a Bank Deposit Slip, OR Bank Statement, OR Internet Banking Screenshot - omitting balances.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Tax Registration / ABN section – (mandatory fields are marked with *)

57. Tax Registration – GST Registered :

If you are GST registered then please click **Yes**, if you are not registered for GST then please click **No**.

RFS will check this information via the ABN lookup

58. Tax Registration - ABN number :

Click **Yes** and add your 11 digit **ABN number** in the field provided. Generally suppliers should have an ABN to do business with RFS, if for some reason you don't then we may need to withhold an amount from the payment called “no ABN withholding”

A screenshot of a web form titled "Tax Registration". It contains three sections, each highlighted with a red border. The first section is a radio button question: "* Are you GST registered?" with options "Yes" and "No", and a red "57" next to it. The second section is another radio button question: "* Do you have an ABN?" with "Yes" selected and "No" as an option, and a red "58" next to it. The third section is a text input field with the label "* ABN" and a placeholder text "add your 11 digit abn here".

ABN Lookup

ABN Lookup visit - <https://abr.business.gov.au/>

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Diversity** section you will find questions about **SME** – please answer these questions with Yes/No (mandatory fields are marked with *)

59. Supplier Diversity

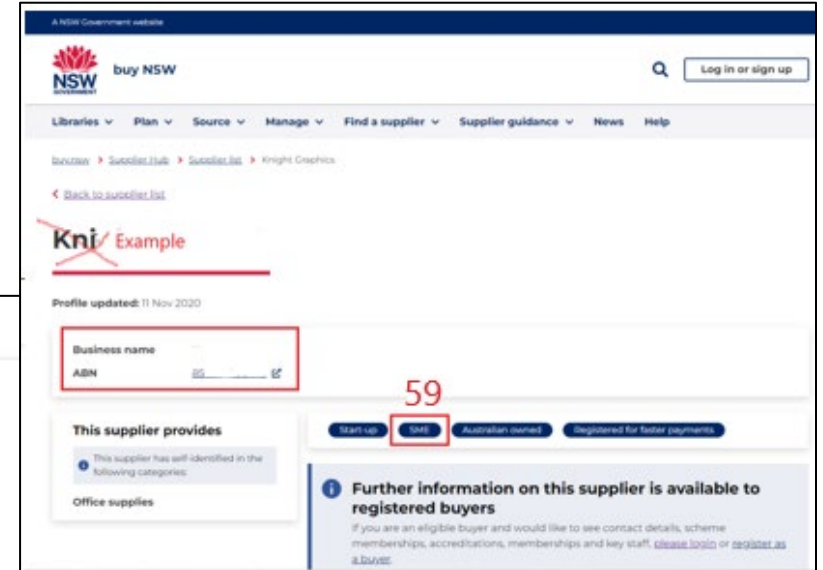
SME – (Small and Medium Enterprise)

SME suppliers that supply to NSW Govt. can register to receive Faster Payment Terms for goods & services. If you are an SME and already registered with BuyNSW then please click **Yes** and add a screenshot of your portal page that shows you are registered for SME by clicking the **Choose file**.

If you aren't registered, then click **No**, otherwise to register go to <https://buy.nsw.gov.au/login/signup>

For further info go to buy.nsw@customerservice.nsw.gov.au or call 1800 670 289

Example of screen shot from Buy NSW portal →



Supplier Diversity **click Yes**

* Are you a Small Medium Enterprise Supplier?

Yes
 No

*** SME Registration** **59**

Choose file No file chosen

Please attach a copy or screenshot of your SME Registration.

click No

* Is this supplier a Small Medium Enterprise Supplier? Yes No **59**

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Diversity** section you will find questions about SME, **Owned Business** & Disability Enterprises – please answer these questions with Yes/No (mandatory fields are marked with *)

60. Supplier Diversity

Aboriginal or Torres Strait Islanders – Owned Business

If your organisation is owned by Aboriginal or Torres Strait Islanders, then please click **Yes**, add **Effective & Expiry date** of the recognition issued in the box provided as well as a brief description. Click on **File** and attach a copy of your recognition from organisation such as First Australians Chamber of Commerce or Supply Nation. Otherwise click **No** if this does not apply

Site reference <https://fncci.org.au/> & <https://supplynation.org.au/>

* Is this an Aboriginal or Torres Strait Islander owned business? **60** **click No**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation, such as First Australians Chamber of Commerce or Supply Nation.

* Is this an Aboriginal or Torres Strait Islander owned business? **60** **click Yes**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation, such as First Australians Chamber of Commerce or Supply Nation.

* Certificate Details

Effective Date	d/m/yy		← add date recognition was issued, if not known, then add today's date
* Expiry Date	d/m/yy		← if known, add expiry date, otherwise add 5 years onto effective date & enter this
* Attachments	Add	File	← attach file by clicking File
Description	add brief description of what recognition you have attached		

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Supplier Diversity** section you will find questions about SME, Business owners & **Disability Enterprises** – please answer these questions with Yes/No (mandatory fields are marked with *)

61. Supplier Diversity

Australian Disability Enterprises (ADE)

If your organisation supports employees with a disability, then please click **Yes** add in date this started if known under **effective & expiry date**, add a copy of the recognition from an appropriate organisation by clicking **file** next to the attachments & add a brief **description**.

* Is this an Australian Disability Enterprises (ADE)? **61** **click No**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation.

* Is this an Australian Disability Enterprises (ADE)? Yes **61** **click Yes**
 No

If yes, please attach a copy of recognition by an appropriate organisation.

* Certificate Details

Effective Date ← add date recognition was issued, if not known, then add today's date

* Expiry Date ← If known, add expiry date, otherwise add 5 years onto effective date & enter this

* Attachments Add [File](#) ← attach file by clicking [File](#)

Description

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Declaration of Conflict of Interest section – section fill in all the fields on the form (mandatory fields are marked with *)

62. Declaration of Conflict of Interest

Suppliers wanting to do business with RFS must declare any perceived or potential conflict of interest. Click the down arrow next to **select** and choose the statement that is correct.

63. If you declare and select “I am a member of a NSW RFS Brigade” you will need to add additional information about the conflict. Add a detailed description in the box under **Describe your conflict** and add documents relating to the conflict under attachments click **choose file**

Declaration of Conflict of Interest

Suppliers must declare any information or circumstances that result in actual, perceived or potential conflict of interest. Conflict of interest may include: paid employment with the NSW RFS, a relationship or association with member of NSW RFS, being a brigade member or any other personal or financial interests that may cause a perceived, potential or actual conflict of interest for the vendor and as such should be reviewed prior to being set up in the RFS vendor system.

* Conflict of interest

Select

click the down arrow and then select

* Conflict of interest

Select

62

I declare, I do not have an actual, perceived or potential Conflict of Interest with NSW RFS

I am a member of a NSW RFS brigade or declare the following:

select the statement that is correct by clicking on it

* Conflict of interest

63

I am a member of a NSW RFS... x

if you select this

* Describe your conflict

You must detail your conflict in this box

Attachment

Choose file

No file chosen

attach any documents here that relate to the conflict

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Confirmation / Terms and Conditions section – (mandatory fields are marked with *)



64. Confirmation


(Terms and Conditions)

Please open and read the Terms and Conditions by clicking on the pdf called **Terms_and_Conditions.pdf** once you have read then click the **Yes** or **No** to confirm your registration as a supplier to the NSW Rural Fire Service.

Confirmation

Terms and Conditions

 [Terms_and_Conditions.pdf](#)  click file to open & read

 Terms_and_Conditions.pdf

* I confirm that I have read the Terms and Conditions and wish to register as a supplier to the NSW Rural Fire Service (ABN25003129221).

Yes **64**

No

SIM – Filling in the form via CSP

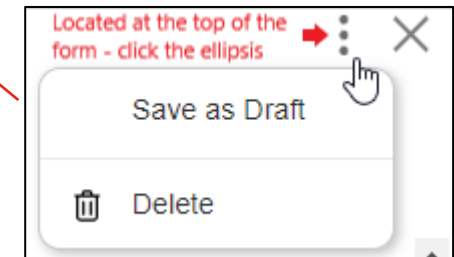
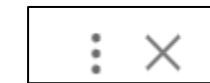
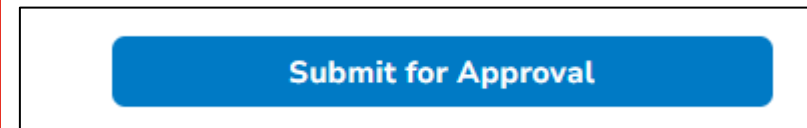
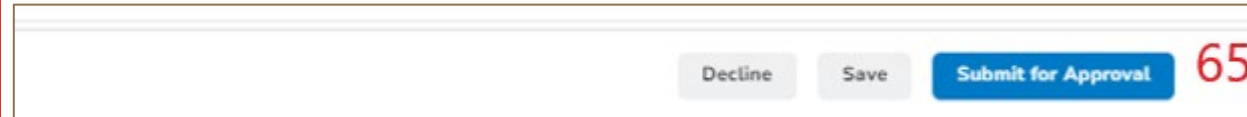
(Registering for the CSP)

“Join and Respond”

Under **Submit for Approval** section – section fill in all the fields on the form (mandatory fields are marked with *)

65. Submit for Approval – once you have reviewed the form detail, please click the **Submit for Approval** button. At this point you can also **Decline & Save**.

66. Error - You will not be able to submit the information for approval, if any mandatory fields are incomplete. The system will display an error and advise to **Please fix the error below** – missing info will be highlighted



SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Pending Approval section – section fill in all the fields on the form (mandatory fields are marked with *)

67. Pending Approval – If everything is filled out correctly and the form has been submitted for approval you will get this message “**Pending Approval**” status at the top of the page, the form will no longer be editable unless you click the withdraw button, a green bar will show “**Your information has been submitted**”.

You should also receive an email advising of the Profile info submitted.

The screenshot shows the Coupa Supplier Portal interface. At the top right, there is a 'Sign Out' link. In the center, the text 'Supplier Information RFS_ST_SIM_003' is displayed above 'Supplier Details'. A red box highlights the 'Pending Approval' status, with the number '67' next to it. A blue notification box on the right says 'You've submitted your request!' with a checkmark icon. Below this, a green notification bar says 'Your information has been submitted' with a close button. At the bottom, it says 'Supplier Information Update' and 'Pending Approval'.

The screenshot shows an email message with the following content:

EMAIL MESSAGE -
you should receive an email similar to this

Profile Info submitted to NSW Rural Fire Service was Approved

Hi name,

The company profile information that you submitted to your customer, NSW Rural Fire Service 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.

* It's important to note that the profile approval doesn't mean that the supplier is ready to go. The RFS Procurement/Finance Team will receive the form and check your entries. In case of any queries, you will be contacted, or the form might be rejected for correction. After approval by the Finance Team, the status of your form will change to Applied, your supplier record will become active for RFS, and the Onboarding process is complete.

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Save This Information to Your Profile** section – (mandatory fields are marked with *)

68. **Save this Information to Your Profile?** - After clicking **Submit for approval** this page will come up, you can click **Yes, Save to Profile** or click **Not Now**. If you need more info then click on **Learn More**

Save This Information to Your Profile? ×

Save this info to your profile so that you'll be able to re-use it when other customers request you the same information.

The following info will be saved to your profile:

Name	Jo Cru Training
Doing Business As	Jo Cru Training
PO Email	joannecruden121+4@gmail.com
Primary Address	
Address Line 2	
Primary Contact	
Work Phone	+61 2 12345678

[Learn More](#)

68

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under Comments section – (mandatory fields are marked with *)

69. Comments box -

If at this point you wish to add any correspondence to RFS staff, then please add your comment in the **Enter comment** box – you can also add an attachment. Once done click **Add Comment**.

Comments Mute Comments

Enter Comment

If needed - add any questions or comments here for RFS staff

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

69 **Add Comment**

SIM – Filling in the form via CSP

(Registering for the CSP)



“Join and Respond”

Under **Withdraw** section – section fill in all the fields on the form (mandatory fields are marked with *)

70. Withdraw button – if you notice an error. If for any reason at this stage after submitting the form, you feel something was entered wrong then you have the opportunity to click the **Withdraw** button, this will open the form again for editing. Make the necessary changes and click the **Submit for Approval** once the changes have been made.

Withdraw 70

Submit for Approval

SIM – Filling in the form via SAN (without registering for the CSP)

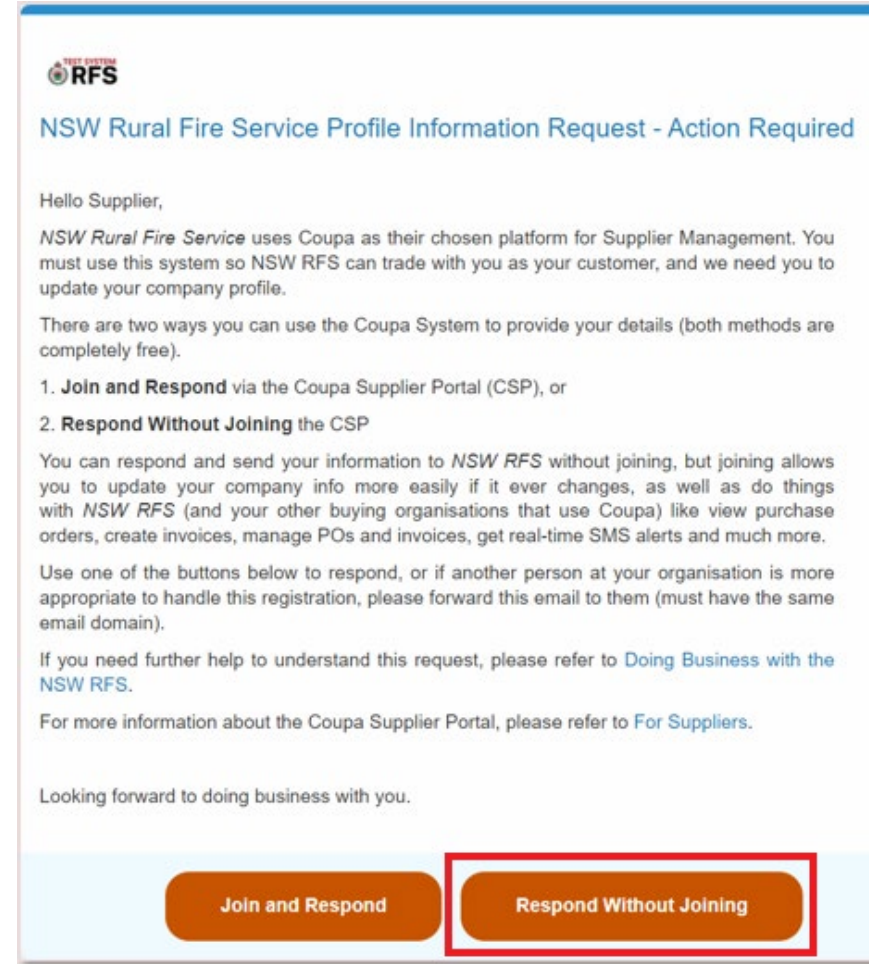
“Respond without Joining”

When RFS sends you an invite to join Coupa you are given the option to “Respond without Joining”.

Respond Without Joining

These are the steps to follow to complete the form when you don't join the CSP – called **SAN (Supplier Actionable Notification)** :-

When you click the “Respond without joining” button, you will be taken directly to the form.
Fill in all the fields on the form



RFS

NSW Rural Fire Service Profile Information Request - Action Required

Hello Supplier,

NSW Rural Fire Service uses Coupa as their chosen platform for Supplier Management. You must use this system so NSW RFS can trade with you as your customer, and we need you to update your company profile.

There are two ways you can use the Coupa System to provide your details (both methods are completely free).

1. **Join and Respond** via the Coupa Supplier Portal (CSP), or
2. **Respond Without Joining** the CSP

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

Use one of the buttons below to respond, or if another person at your organisation is more appropriate to handle this registration, please forward this email to them (must have the same email domain).

If you need further help to understand this request, please refer to [Doing Business with the NSW RFS](#).

For more information about the Coupa Supplier Portal, please refer to [For Suppliers](#).

Looking forward to doing business with you.

Join and Respond Respond Without Joining

Note – RFS recommend completing this process on a laptop or PC for a better experience. Using a mobile phone limits the page views, and some of the links in the form may not work.

SIM – Filling in the form via SAN (without registering for the CSP)



“Respond without Joining”

Under **Supplier Details** section – please fill in all the fields on the form (mandatory fields are marked with *)

1. **Entity Name** – enter the Entity name that appears in the ABN lookup for your company
<https://abr.business.gov.au>
2. **Business Name** – enter the business name that appears in the ABN lookup (if you don't have one enter the Entity name here as well).
3. **Industry** – this will be completed by RSP (no need to fill in) generally this is Private Sector.
4. **PO Email** – enter the email address you would like PO's from RFS sent to.

The image shows two screenshots. The left screenshot is the Coupa Supplier Portal (CSP) 'Supplier Details' form. The right screenshot is the 'ABN Lookup' website showing details for ABN 25 003 129 221.

ABN Lookup Details:

Current details for ABN 25 003 129 221	
Entity name:	NSW RURAL FIRE SERVICE
ABN status:	Active from 01 Nov 1999
Entity type:	State Government Entity
Goods & Services Tax (GST):	Registered from 01 Jul 2000
Main business location:	NSW 2127

Business name(s):

Business name(s)	
Trading name	Department of Rural Fire Service NSW Rural Fire Service

Coupa Supplier Portal (CSP) Fields:

- * Entity Name: [Red box 1]
- * Business Name: [Red box 2]
- Industry: [Red box 3]
- * PO Email: [Red box 4]

Red arrows point from the ABN Lookup details to the corresponding fields in the CSP form.

SIM – Filling in the form via SAN (without registering for the CSP)

“Respond without Joining”

Under **Primary Contact** section – please fill in all the fields on the form (mandatory fields are marked with *)

5. **Contact Purpose** – click on the drop down to select an option
 - i. **First name** – enter the primary contact name (main contact)
 - ii. **Surname** – enter the primary contacts surname
 - iii. **Primary contact email** – enter the email address who is the main contact
6. **Mobile & Work Phone Number** – change the default to “other” to enter the phone number.
 - First box – country code eg 61
 - Second box – area code eg 2
 - Third box – local or mobile number

* Primary Contact

The primary contact is the person responsible for sole representative on behalf of your company – the main contact for the application.

Contact Purpose Select Some Options ⓘ

* **First name**

* **Surname**

* **Primary Contact Email** ⓘ

Phone numbers – follow an international standard for text boxes

Mobile Phone Other ▼

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

• Change the default to “Other” to enter Australian phone numbers.
• First Box - country code, e.g. “61” (digits only, no + required).
• Second Box - area code, e.g. “2” for NSW (no leading zero).
• Third Box - local number (for mobiles, no leading zero.)

Work Phone US/Canada ▼

650-555-1212

Contact Purpose

- Accounting
- Diversity
- Executive
- Legal
- Other
- Procurement
- Sales
- Service Desk
- Sourcing

5

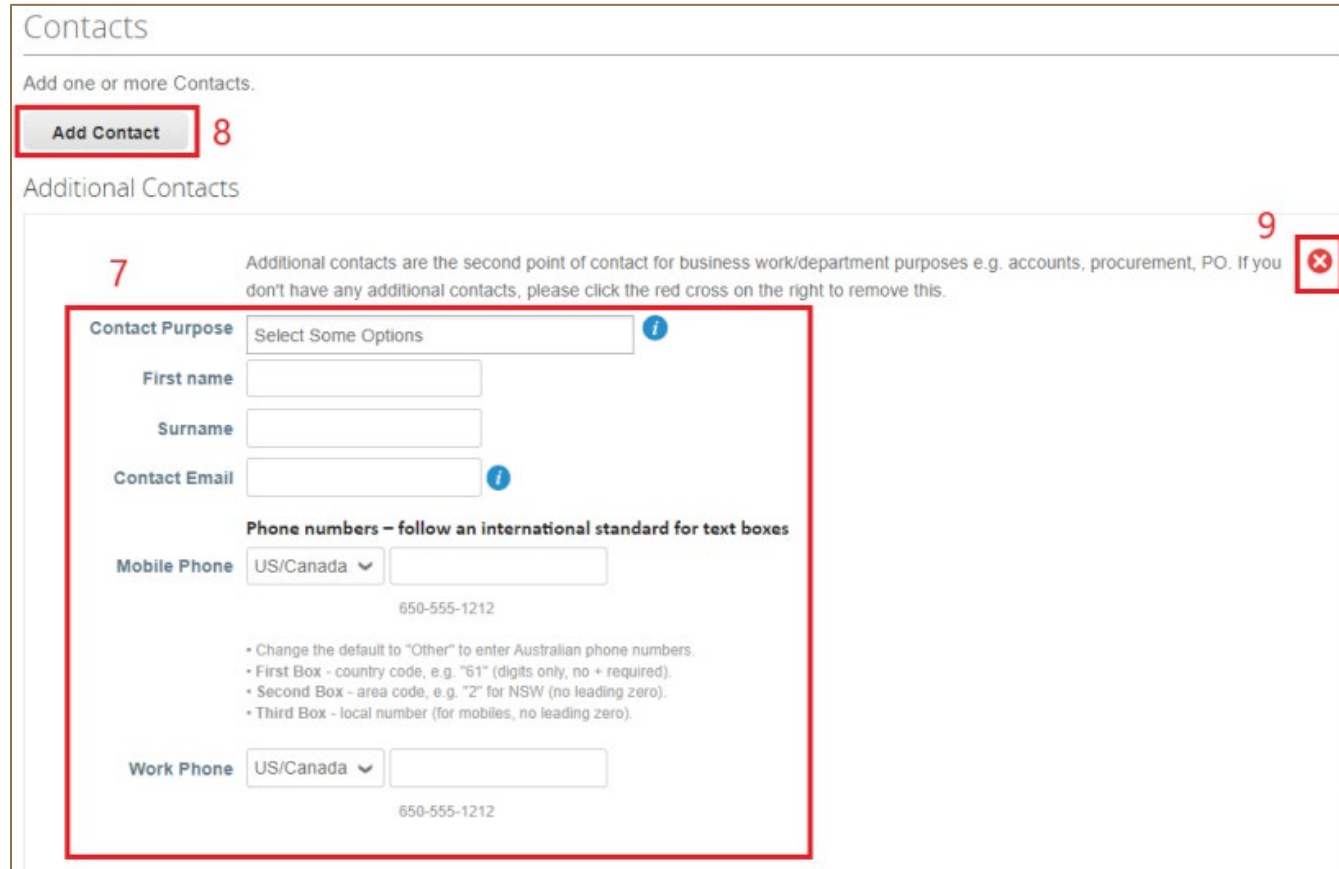
6

SIM – Filling in the form via SAN (without registering for the CSP)

“Respond without Joining”

Under Contacts “Additional” section fill in all the fields on the form (mandatory fields are marked with *)

7. **Additional contacts** – if you have more than one contact at your company and would like to list them then please complete this section.
8. **Add contact** – you can click the add contact button to add more.
9. **Red Cross** - If you don't have any additional contacts then click on the red cross to remove this section



Contacts

Add one or more Contacts.

Add Contact 8

Additional Contacts

7 Additional contacts are the second point of contact for business work/department purposes e.g. accounts, procurement, PO. If you don't have any additional contacts, please click the red cross on the right to remove this. 9

Contact Purpose Select Some Options *i*

First name

Surname

Contact Email *i*

Phone numbers – follow an international standard for text boxes

Mobile Phone US/Canada 650-555-1212

- Change the default to "Other" to enter Australian phone numbers.
- First Box - country code, e.g. "61" (digits only, no + required).
- Second Box - area code, e.g. "2" for NSW (no leading zero).
- Third Box - local number (for mobiles, no leading zero).

Work Phone US/Canada 650-555-1212

SIM – Filling in the form via SAN

(without registering for the CSP)



“Respond without Joining”

Under **Supplier Address** section – please fill in all the fields on the form (mandatory fields are marked with *)

10. **Address Purposes** – this field is not mandatory, but you can select an option from the drop down
11. **Region** –
 - i. **Country/Region** – select the country from the drop down
 - ii. **State Region** – select the state from the drop down. State ISO Code will automatically populate when the state is selected.

Note - If you get an error here – please ensure you are completing the form on a laptop or PC and not a mobile phone

12. **Address** – enter your **street address** you can carry over into street address 2,3,4 if needed
13. **City/Postal Code** – enter the suburb and post code for your location

* Supplier Address

Address Purposes ⓘ

11 * Region

Country/Region ⓘ i.

State Region x ii.

State ISO Code

Address Name

* Street Address 12

Street Address 2

Street Address 3

Street Address 4

* City 13

* Postal Code

Location Code

Address Purposes

- Branch
- Franchise
- HQ
- Other Address
- Service Centre
- Warehouse

Country/Region

- Australia
- Afghanistan
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas

State Region

- New South Wales - NSW
- Australian Capital Territory - ACT
- New South Wales - NSW
- Northern Territory - NT
- Queensland - QLD
- South Australia - SA
- Tasmania - TAS
- Victoria - VIC
- Western Australia - WA

SIM – Filling in the form via SAN

(without registering for the CSP)

“Respond without Joining”

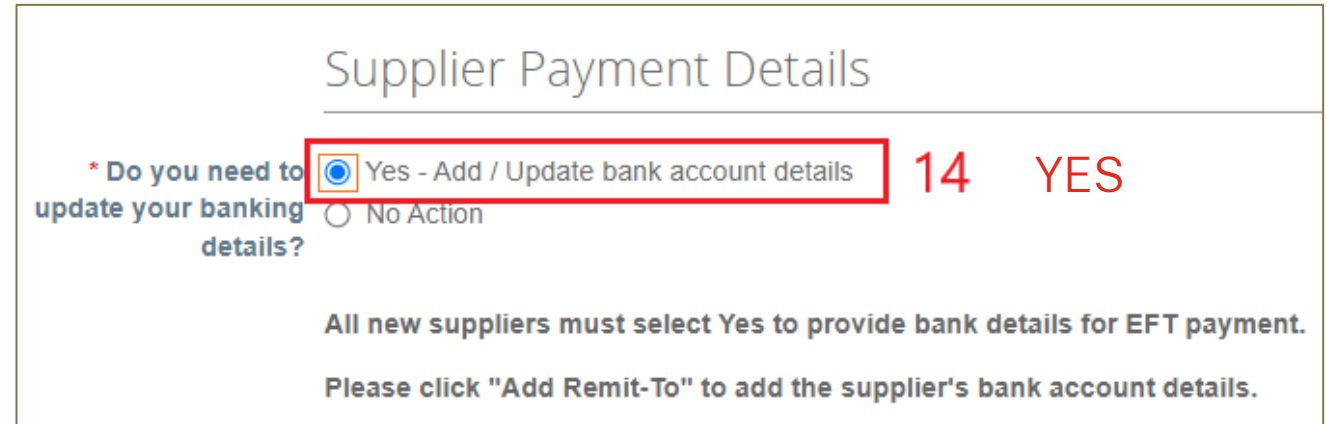
Under **Supplier Payment Details** section – please fill in all the fields on the form (mandatory fields are marked with *)

Supplier Payment Details

14. **Payment Details – “YES”**, if you are a new supplier then you must click **yes** to add bank account details.

This will then display the **add-remit-to** section. (see next page – point 16.)
(We cannot make payment without this).

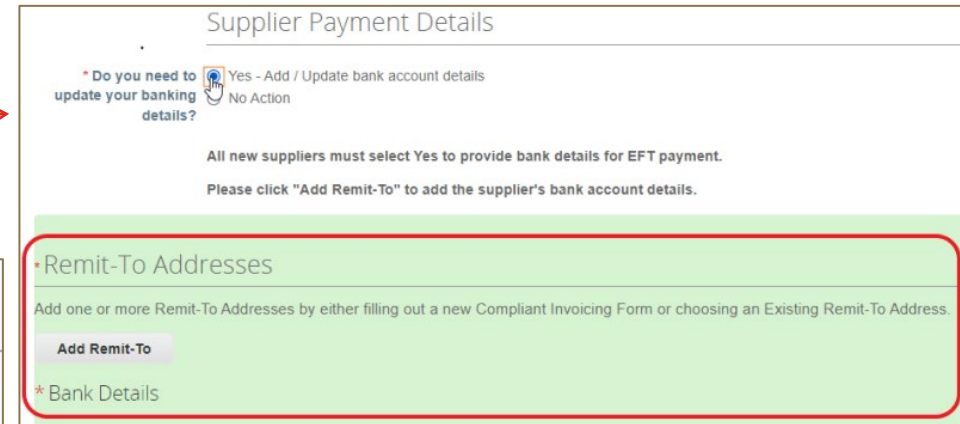
15. **Payment Details – “NO”**, only click **no action** if you are an existing supplier and don't need to update bank details.



Supplier Payment Details

* Do you need to update your banking details? Yes - Add / Update bank account details **14 YES** No Action

All new suppliers must select Yes to provide bank details for EFT payment.
Please click "Add Remit-To" to add the supplier's bank account details.



Supplier Payment Details

* Do you need to update your banking details? Yes - Add / Update bank account details No Action

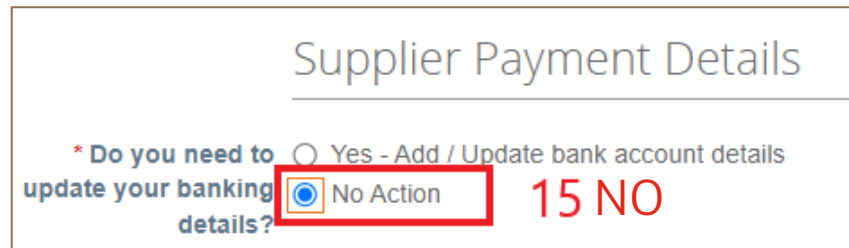
All new suppliers must select Yes to provide bank details for EFT payment.
Please click "Add Remit-To" to add the supplier's bank account details.

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

* Bank Details



Supplier Payment Details

* Do you need to update your banking details? Yes - Add / Update bank account details No Action **15 NO**

SIM – Filling in the form via SAN (without registering for the CSP)

“Respond without Joining”

Under Remit-To Addresses section -“New Supplier” please fill in all the fields on the form (mandatory Fields are marked with *)

16. Add Remit-To (Bank Details) :

New Supplier- If you are a New supplier, please enter your remittance details in the form.

- **Remittance email** – this is where RFS will send payment advice when making EFT payment
- **Bank Name** – enter the name of the bank that your account is held with
- **Account Name** – enter the account holders name that appears in your bank details
- **Bank account Number** – enter the account number of where the funds will be deposited
- **BSB Number** – enter the BSB number that identifies your banks branch
- **Branch Name** – enter if known the location
- **Bank Country/Region** – country the bank is located generally Australia

*Remit-To Addresses **16 i.**

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

* Bank Details

If you are a **New Supplier**, please enter your remittance details in the form below.

* Remittance Email **i** ← enter email address for remittance advice
This is where RFS will send payment advice when making an EFT payment.

* Bank Name ← Fill in the name of the Financial institution you bank with eg CBA (Commonwealth bank)

* Account Name ← enter account name registered with your bank which appears on the bank evidence to be provided

* Bank Account Number **i** ← enter account number (up to 9 digits)
Australian Bank Account Numbers have a maximum of **9 digits**.

* BSB Number **i** ← enter the BSB number that identifies your banks branch (6 digits)
Please enter your **6 digits** BSB number without “-”

Branch Name ← not mandatory but can be completed if known

* Bank Country/Region ← click the drop down and select Australia overseas select the country location

Bank Country/Region dropdown menu:
Afghanistan
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua and Barbuda
Argentina
Armenia
Aruba
Australia

Note – Bank details will be encrypted (masked) once form has been approved by RFS.

SIM – Filling in the form via SAN (without registering for the CSP)



“Respond without Joining”

Under Remit-To Addresses section -“New Supplier” – please fill in all the fields on the form (mandatory fields are marked with *)

17. Add Remit-To (Bank Details) :
Existing Supplier – If you are an Existing supplier and need to provide a new remittance details.
18. Click the **red cross** on the right to delete this existing info and then click Add Remit-To to enter new remittance details.
19. Then click **Add Remit-To** which will bring up the bank details fields for you to provide your new details

Note – Bank details will be encrypted (masked) once form has been approved by RFS.

* Remit-To Addresses 17

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 19

* Bank Details

18

If you are an **Existing Supplier** and like to **provide a New Remittance**, please click the red cross on the right to delete this existing one and then click Add Remit-To above to enter your new remittance details.

* Bank Details

If you are an **Existing Supplier** and like to **provide a New Remittance**, please click the red cross on the right to delete this existing one and then click Add Remit-To above to enter your new remittance details.

* Remittance Email ← enter email address for remittance advice
This is where RFS will send payment advice when making an EFT payment.

* Bank Name ← Fill in the name of the Financial institution you bank with eg CBA (Commonwealth bank)

* Account Name ← enter account name registered with your bank which appears on the bank evidence to be provided

* Bank Account Number ← enter account number (up to 9 digits)
Australian Bank Account Numbers have a maximum of 9 digits.

* BSB Number ← enter the BSB number that identifies your banks branch (6 digits)
Please enter your 6 digits BSB number without "-"

Branch Name ← not mandatory but can be completed if known

* Bank Country/Region ← click the drop down and select Australia

SIM – Filing in the form via SAN

(without registering for the CSP)

“Respond without Joining”

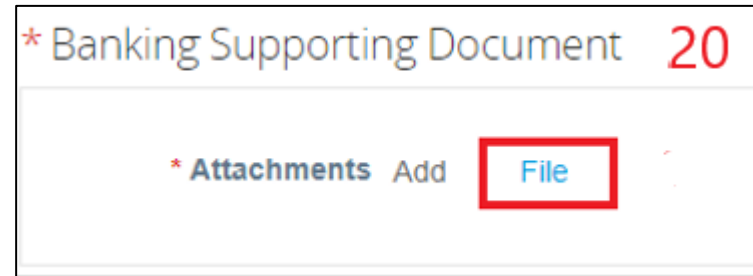
Under **Banking Supporting Document** section – please attach document on the form (mandatory fields are marked with *)

20. Banking Supporting Document : Attachment – To verify the bank details entered into the form. We require the following documentary evidence of your banking details, **this must show**

- *Bank name/logo*
- *Account name*
- *Account Number*
- *BSB number*

Please click **“File”** and attach the evidence (preferably in pdf format)

Note – this is required for auditing and ICAC purposed (to prevent fraud)



Please click "File" to provide one of the following as documentary evidence of your banking details, showing Bank Name, Account Name, BSB, and Account Number: A copy of a Bank Deposit Slip, OR Bank Statement, OR Internet Banking Screenshot - omitting balances.

SIM – Filling in the form via SAN

(without registering for the CSP)



“Respond without Joining”

Under Tax Registration section – please fill in all the fields on the form (mandatory fields are marked with *)

21. Tax Registration – GST Registered :

If you are GST registered then please click **Yes**, if you are not registered for GST then please click **No**.

RFS will check this information via the ABN lookup

22. Tax Registration - ABN number :

Click **Yes** and add your 11 digit **ABN number** in the field provided. Generally suppliers should have an ABN to do business with RFS, if for some reason you don't then we may need to withhold an amount from the payment called “no ABN withholding”

A screenshot of the 'Tax Registration' section of a form. It contains three questions, each with a red asterisk indicating it is mandatory. The first question is 'Are you GST registered?' with radio buttons for 'Yes' and 'No', and a red '21' next to it. The second question is 'Do you have an ABN?' with radio buttons for 'Yes' (selected) and 'No', and a red '22' next to it. The third question is 'ABN' with a text input field containing the placeholder text 'add your 11 digit abn here'. All three questions and their respective input areas are enclosed in red rectangular boxes.

ABN Lookup

ABN Lookup visit - <https://abr.business.gov.au/>

SIM – Filling in the form via SAN (without registering for the CSP)



“Respond without Joining”

Under Supplier Diversity section you will find questions about **SME** – please answer these questions with Yes/No (mandatory fields are marked with *)

23. Supplier Diversity

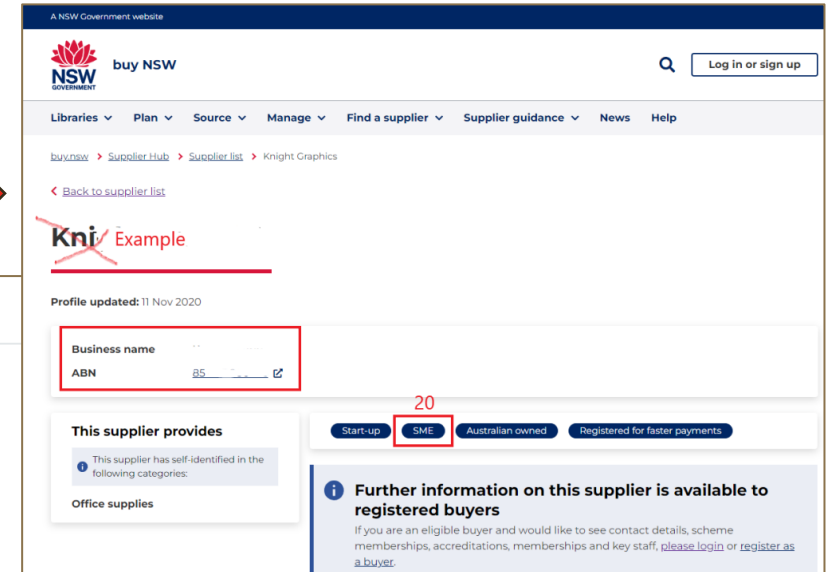
SME – (Small and Medium Enterprise)

SME suppliers that supply to NSW Govt. can register to receive Faster Payment Terms for goods & services. If you are an SME and already registered with BuyNSW then please click **Yes** and add a screenshot of your portal page that shows you are registered for SME by clicking the **Choose file**.

If you aren't registered, then click **No**, otherwise to register go to <https://buy.nsw.gov.au/login/signup>

For further info go to buy.nsw@customerservice.nsw.gov.au or call 1800 670 289

Example of screen shot from Buy NSW portal →



Supplier Diversity **click Yes**

* Are you a Small Medium Enterprise Supplier?

- Yes
 No

SME suppliers that supply to NSW Govt. can register to [Receive Faster Payment Terms](#) for goods & services. For more info - [Faster Payment Terms](#). **If you are already registered** & have a supplier profile, please click "yes" & provide a screenshot of your portal page showing you are registered. **If you aren't registered** & don't have a supplier profile, [you can sign up here](#), & be given the option to join the faster payments register. If you need help with registering for Faster Payments, you can contact Buy NSW at buy.nsw@customerservice.nsw.gov.au or by calling 1800 670 289

* SME Registration

Choose file No file chosen

20

Please attach a copy or screenshot of your SME Registration.

click No

* Is this supplier a Small Medium Enterprise Supplier? Yes **20**
 No

SIM – Filling in the form via SAN

(without registering for the CSP)



“Respond without Joining”

Under Supplier Diversity section you will find questions about SME, **Owned Business** & Disability Enterprises – please answer these questions with Yes/No (mandatory fields are marked with *)

24. Supplier Diversity

Aboriginal or Torres Strait Islanders – Owned Business

If your organisation is owned by Aboriginal or Torres Strait Islanders, then please click **Yes**, add **Effective & Expiry date** of the recognition issued in the box provided as well as a brief description. Click on **File** and attach a copy of your recognition from organisation such as First Australians Chamber of Commerce or Supply Nation. Otherwise click **No** if this does not apply

Site reference <https://fncci.org.au/> & <https://supplynation.org.au/>

* Is this an Aboriginal or Torres Strait Islander owned business? **21** **click No**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation, such as First Australians Chamber of Commerce or Supply Nation.

* Is this an Aboriginal or Torres Strait Islander owned business? **21** **click Yes**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation, such as First Australians Chamber of Commerce or Supply Nation.

* Certificate Details

Effective Date	d/m/yy		← add date recognition was issued, if not known, then add today's date
* Expiry Date	d/m/yy		← if known, add expiry date, otherwise add 5 years onto effective date & enter this
* Attachments	Add	File	← attach file by clicking File
Description	add brief description of what recognition you have attached		

SIM – Filling in the form via SAN

(without registering for the CSP)



“Respond without Joining”

Under **Supplier Diversity** section you will find questions about SME, Business owners & **Disability Enterprises** – please answer these questions with Yes/No (mandatory fields are marked with *)

25. Supplier Diversity

Australian Disability Enterprises (ADE)

If your organisation supports employees with a disability, then please click **Yes** add in date this started if known under **effective & expiry date**, add a copy of the recognition from an appropriate organisation by clicking **file** next to the attachments & add a brief description.

* Is this an Australian Disability Enterprises (ADE)? **22** **click No**

Yes
 No

If yes, please attach a copy of recognition by an appropriate organisation.

* Is this an Australian Disability Enterprises (ADE)? Yes **22** **click Yes**
 No

If yes, please attach a copy of recognition by an appropriate organisation.

* Certificate Details

Effective Date ← add date recognition was issued, if not known, then add today's date

* Expiry Date ← if known, add expiry date, otherwise add 5 years onto effective date & enter this

* Attachments Add [File](#) ← attach file by clicking File

Description

SIM – Filling in the form via SAN

(without registering for the CSP)



“Respond without Joining”

Under Declaration of Conflict of Interest section – section fill in all the fields on the form (mandatory fields are marked with *)

26. Declaration of Conflict of Interest

Suppliers wanting to do business with RFS must declare any perceived or potential conflict of interest. Click the down arrow next to **select** and choose the statement that is correct.

27. If you declare and select “I am a member of a NSW RFS Brigade” you will need to add additional information about the conflict. Add a detailed description in the box under **Describe your conflict** and add documents relating to the conflict under attachments click **choose file**

Declaration of Conflict of Interest

Suppliers must declare any information or circumstances that result in actual, perceived or potential conflict of interest. Conflict of interest may include: paid employment with the NSW RFS, a relationship or association with member of NSW RFS, being a brigade member or any other personal or financial interests that may cause a perceived, potential or actual conflict of interest for the vendor and as such should be reviewed prior to being set up in the RFS vendor system.

* Conflict of interest

Select



click the down arrow and then select

* Conflict of interest

27

I am a member of a NSWRF... x



if you select this

* Conflict of interest

Select



26

I declare, I do not have an actual, perceived or potential Conflict of Interest with NSW RFS



select the statement that is correct by clicking on it

I am a member of a NSW RFS brigade or declare the following:

* Describe your conflict

You must detail your conflict in this box

Attachment

Choose file

No file chosen

attach any documents here that relate to the conflict

SIM – Filling in the form via SAN (without registering for the CSP)



“Respond without Joining”

Under **Confirmation (Terms and Conditions)** section – section fill in all the fields on the form (mandatory fields are marked with *)


28. Confirmation


(Terms and Conditions)

Please open and read the Terms and Conditions by clicking on the pdf called **Terms_and_Conditions.pdf** once you have read then click the **Yes** or **No** to confirm your registration as a supplier to the NSW Rural Fire Service.

Confirmation

Terms and Conditions

 [Terms_and_Conditions.pdf](#) ← click file to open & read

 Terms_and_Conditions.pdf

* I confirm that I have read the Terms and Conditions and wish to register as a supplier to the NSW Rural Fire Service (ABN25003129221).

Yes **28**

No

SIM – Filling in the form via SAN (without registering for the CSP)

“Respond without Joining”

Under **Review** section – section fill in all the fields on the form (mandatory fields are marked with *)

29. Review – once you have completed all the fields in the form and comfortable with the information provided, please click the **Review** button.

At this point you can also **Delete** and **Save as Draft** – this is located at the top of the form by clicking the 3 dots (ellipsis)

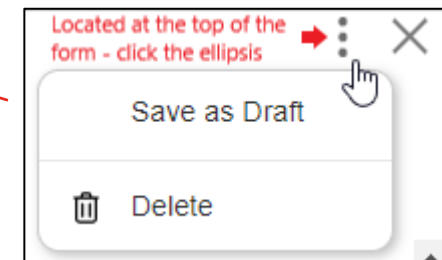
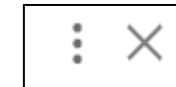
30. If you haven't filled in mandatory fields the form will give a warning sign to **Please fix the errors below** and the fields will highlight noting they **can't be blank** – correct these errors and the form will take you to the next screen.



29 Cancel Delete Save as Draft Review



Review



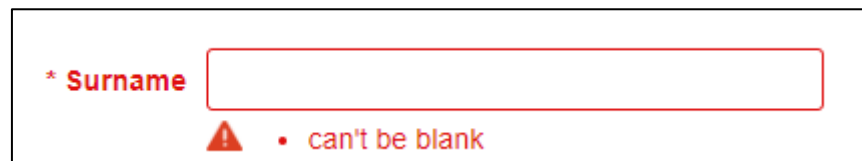
Located at the top of the form - click the ellipsis

Save as Draft

Delete



Please fix the errors below. 30



* Surname

⚠ • can't be blank

SIM – Filling in the form via SAN

(without registering for the CSP)

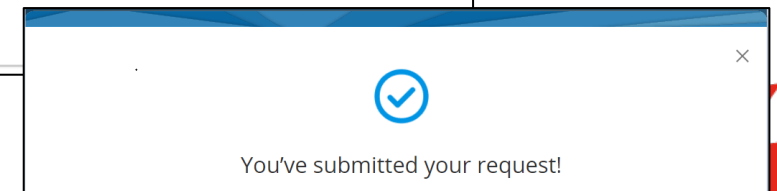
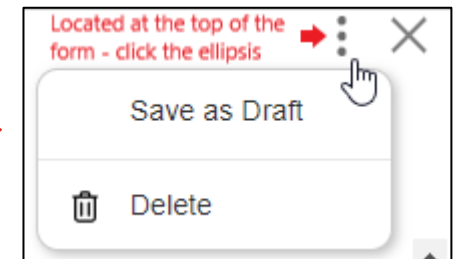
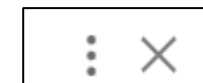
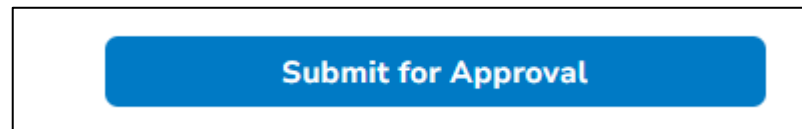
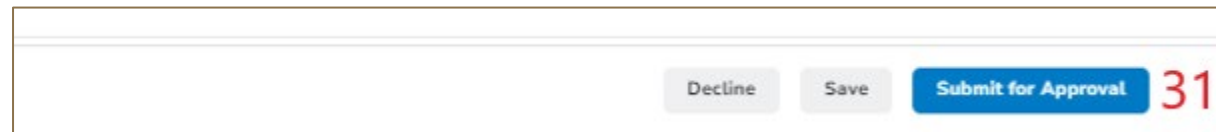
“Respond without Joining”

Under **Submit for Approval** section – section fill in all the fields on the form (mandatory fields are marked with *)

31. Submit for Approval – once you have reviewed the form detail, please click the **Submit for Approval** button.

At this point you can also **Decline & Save**, this is located at the top of the form by clicking the 3 dots (ellipsis)

32. Pending Approval – you will know the form is submitted when a Pending Approval status is visible at the top of the form, and the form is no longer editable.



Note – The Procurement/Finance Team will receive the form and check your entries. In case of any queries, you will be contacted, or the form might be rejected for correction. After approval by the Finance Team, the status of your form will change to Applied, your supplier record will become active for RFS, and the Onboarding process is complete.

SIM – Form Comments (Communication)

In the Comments Section you have the possibility to Communicate with RFS.

If you have any questions or comments when a form has been approved or rejected – use Coupa’s comment functionality to contact RFS. RFS can also send you messages via this section if we have issues on what has been submitted. You will also receive this message via an email.

1. To add a comment for RFS, scroll to the bottom of the form and locate the comments box, enter your comment and click **Add comment**.
2. All comments entered will be visible by RFS in history at the bottom of the page



The screenshot shows a 'Comment' form interface. At the top left is a speech bubble icon and the word 'Comment'. At the top right is a 'Mute Comments' dropdown menu. Below this is a text input field labeled 'Enter Comment'. Underneath the input field is a smaller text field for 'Send Comment notification to a user by typing @name (ex. @JohnSmith)'. Below that is an 'Attachments' section with 'Add File | URL' links. At the bottom right, there is a red number '1' next to an 'Add Comment' button.

SIM – Notification of Form Rejection



Once RFS have reviewed the information you have submitted via the SIM form, they will approve or reject, if the information provided is not accepted, they will **reject**, and the form will be returned to you with a reason.

- An email notification informing you of the rejection
- A notification with the reason(s) for the rejection which includes a comment on why the form was rejected
- Click on “**Update Info**” or “**Respond**” – the form will open, and all fields are editable, once you have fixed the issue, then resubmit.

“Join and Respond”

Profile Info submitted to NSW Rural Fire Service was Not Approved (CSP)

To

Hi XXX,
The company profile information that you submitted to your customer, NSW Rural Fire Service was not accepted. This usually means that some information was not correct and they cannot activate your new information as is. You can click below to view additional details or update your info.

“Respond without Joining”


Profile Info submitted to NSW Rural Fire Service was Not Approved (SAN)

To

Hi XXX,
The supplier information you submitted was rejected by NSW Rural Fire Service. You will need to create an account on the Coupa Supplier Portal to resubmit this information (to keep your information secure) by using the link below and confirming your email. Use below link to create an account. Use this email address to register. After you create an Account, confirm the email sent to you and log in, go to the Profile tab to resubmit your information to your customer.

Note – you can also see the reason why the form was rejected at the bottom of the page, in the comments section

to supplier

 Qisi rejected on 5/1/24 at 9:42 AM

The ABN entity name is different from the bank account name. Please provide correct ABN or bank details.

SIM – Notification of Form Approval



Once RFS has reviewed and approved the information you have submitted via a SIM (Supplier Information Management) form you will receive the following email confirming it has been approved.



Profile Info submitted to NSW Rural Fire Service was Approved

Hi John,

The company profile information that you submitted to your customer, NSW Rural Fire Service 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.

SIM – Notification of Form Approval - SAP



Once RFS has created the vendor number will you receive an email notifying you of your unique vendor number which is a 6-digit number, this vendor number can be quoted to RFS staff to easily locate your profile/account. Email will come from no-reply@rfs.nsw.gov.au with subject line New Vendor Notification

From: <no-reply@rfs.nsw.gov.au>
Date: Tue, 16 May 2023, 12:03 am
Subject: New Vendor Notification

Dear Supplier

Thank you for commencing the process to become a Supplier to the NSW Rural Fire Service.

This process is now complete and your Vendor number is 0000140000.

Please pass this number to anyone in your organisation that deals with RFS and quote it on all correspondence with the RFS.

DISCLAIMER: This email message, including any attachments, is intended for the individual or entity to whom it is addressed and may contain information that is confidential, privileged and/or exempt from disclosure under applicable law. If you have received this email in error you must not disclose or use the information in it. Please delete the email and any copies and notify the sender. Confidentiality or privilege are not waived or lost by reason of the mistaken delivery to you. Views expressed in this message are those of the individual sender, and are not necessarily the views of the Department of Communities and Justice. The Department accepts no liability for any loss or damage arising from the use of this email or attachments and recommends that the recipient check this email and any attached files for the presence of viruses.

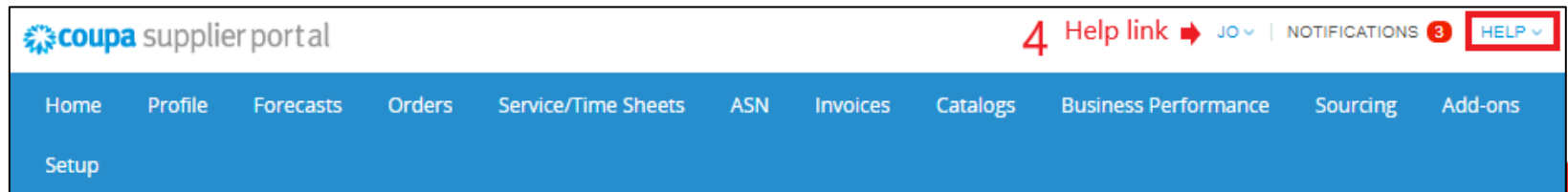
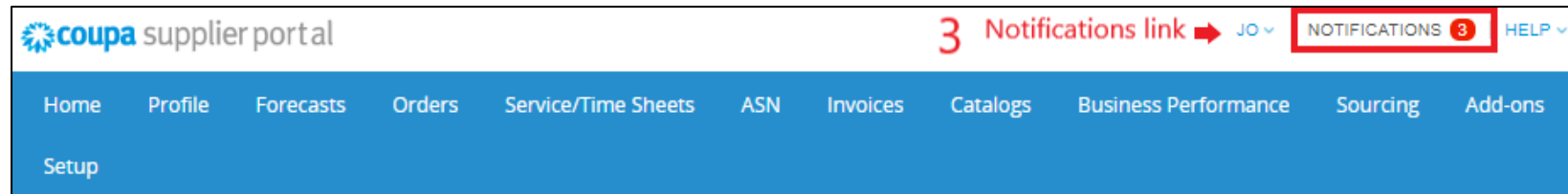
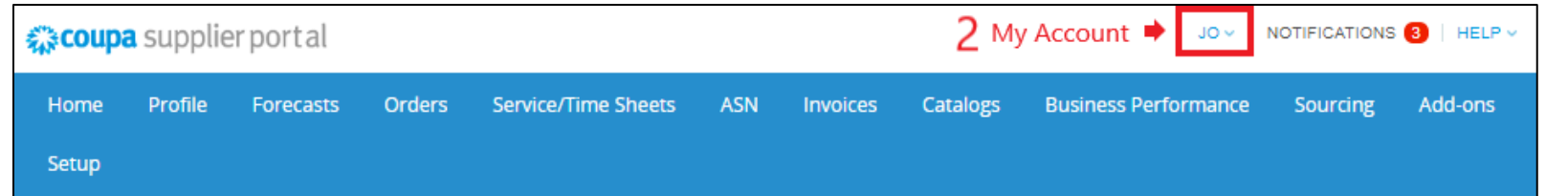
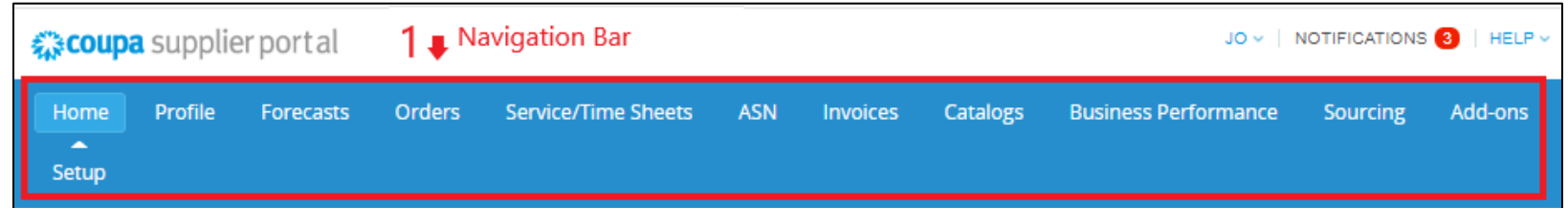
SIM – Coupa Homepage



Once you have successfully signed in, you will be taken to the Coupa Homepage. This section will explain the functions available in the portal.

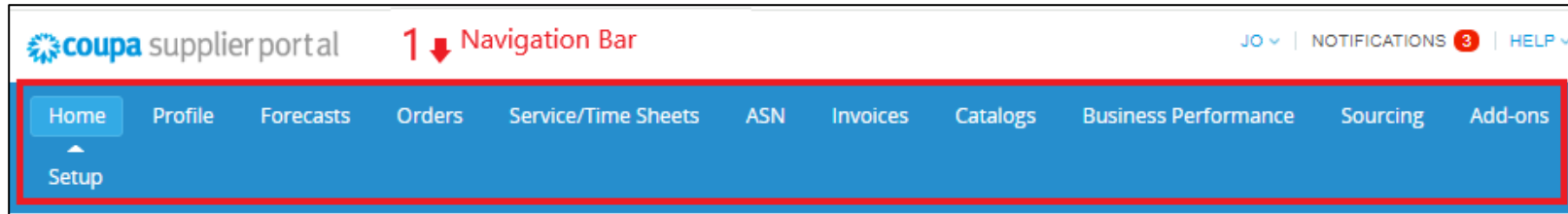
On the homepage you will see the key buttons :-

1. **Navigation Bar** – which includes Home, Profile, Orders, Invoices, Catalog & Setup
2. **My Account** – Manage the platform & change passwords to your CSP account
3. **Notifications** – confirm your preferences for receiving
4. **Help** – Online Help Menu Button with Coupa standard videos and training modules.



SIM – Coupa Homepage Navigation bar

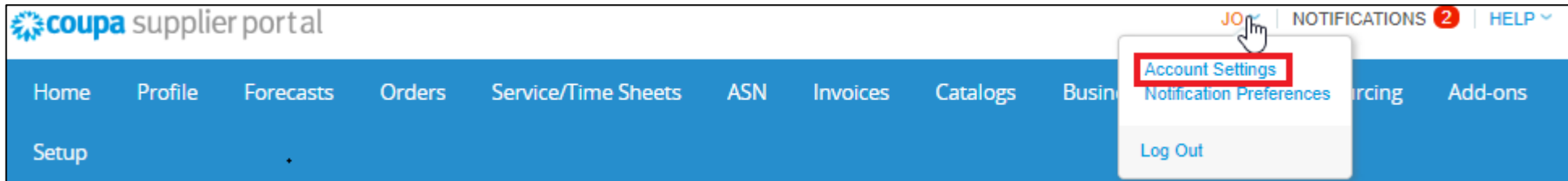
On the homepage at the top you will find the menu for the options available within the portal. Below are the functions you can perform from the blue Navigation bar – some functions are not supported for RFS and greyed out in the below list.



- **Home** – Manage your public profile for transacting with other customers on Coupa
- **Profile** – Manage your profile on the Coupa Portal
- **Forecasts** – not supported for RFS
- **Orders** – Manage purchase orders
- **Service/Time Sheets** – not supported for RFS
- **ASN** – not supported for RFS
- **Invoices** – View all invoices created and current status.
- **Catalogues** – for creation and management of catalogues please contact procurement@rfs.nsw.gov.au if you would like to manage your catalogue through CSP.
- **Business Performance** – gives you insights into your transactions with RFS
- **Sourcing** –
- **Add-ons** – not supported for RFS
- **Setup**
 - **User Information** – invite add, edit or remove users
 - **Merge Requests** – merge or unmerge other accounts

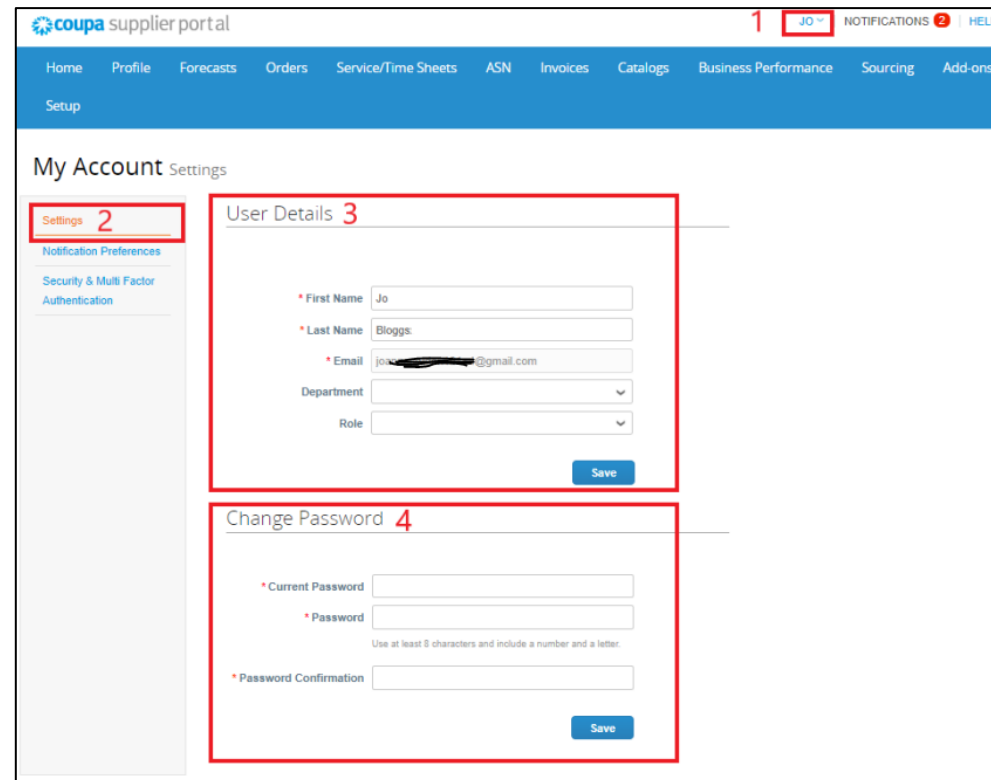
SIM – My Account > Account Settings

My Account > Account settings – here you can manage details and your password



Under My Account > Account Setting you can manage your user details and change password.

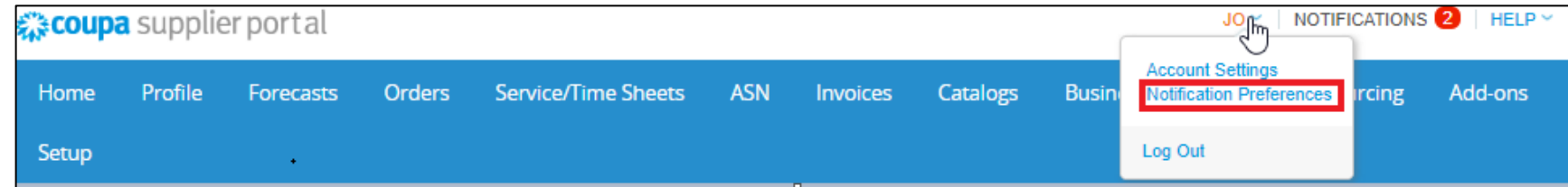
1. **My Account (listed with a name)** click on the arrow then
2. **Settings** – click on settings
3. **User Details** –check info is correct and update if needed, you can also add in your department and role once entered click save
4. **Change Password** – option to change your password if needed then click save



SIM – My Account > Notification Preferences



My Account > Notification Preferences – here you can enable or disable your notifications



Under **My Account > Notification Preferences** you can manage the way you receive notifications by enabling or disabling

1. **My Account** - Click on the down arrow next to **My Account** then click
2. **Notification Preferences** this screen will display all the notification selections that you have as a supplier, you can configure it to suit your needs.
3. **Heading** - Under each category heading tick the box next to the notification type you want to receive **Online** (to do list), **Email** or **SMS**. Once done click **Save**. Greyed out fields can't be changed.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email [redacted]@gmr Mobile(SM) +61 400 4... **Verify**

Verify number to receive SMS

Category	Online	Email	SMS
Request to Join	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Merge Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Announcements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Customer Announcement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service/Time Sheets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A Service/Time Sheet is rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A Service/Time Sheet is approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

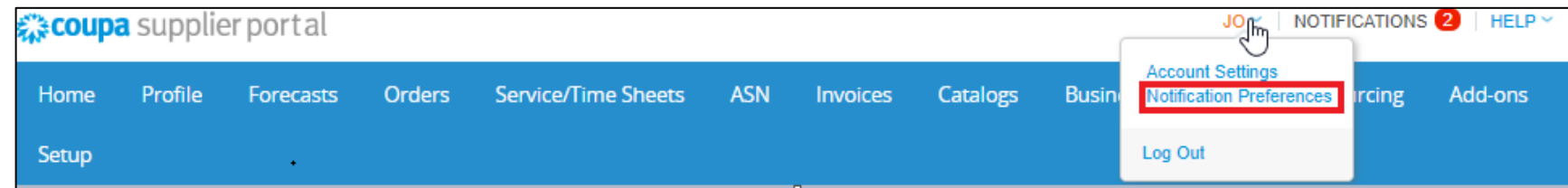
Cancel **Save**

Extract of some of the category headings from Notification Preferences

SIM – My Account > Security & Mutli Factor Authentication

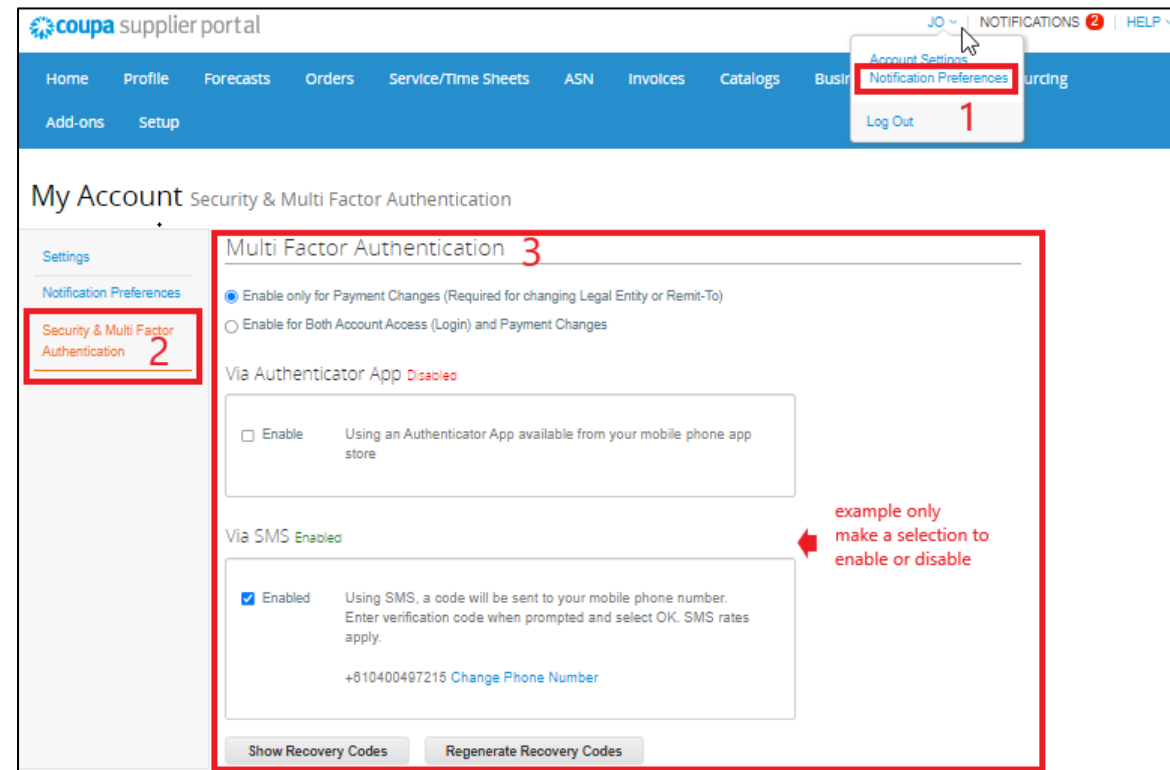


My Account > Security & Multi Factor Authentication - here you can enable or disable your Multi Factor Authentication



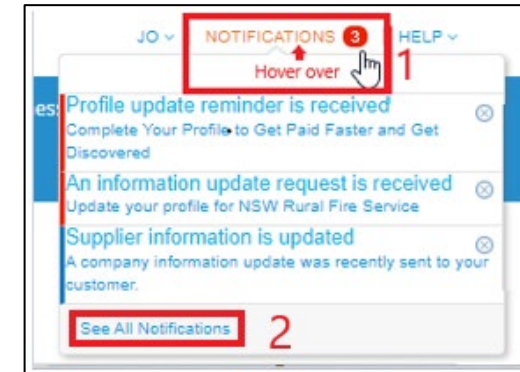
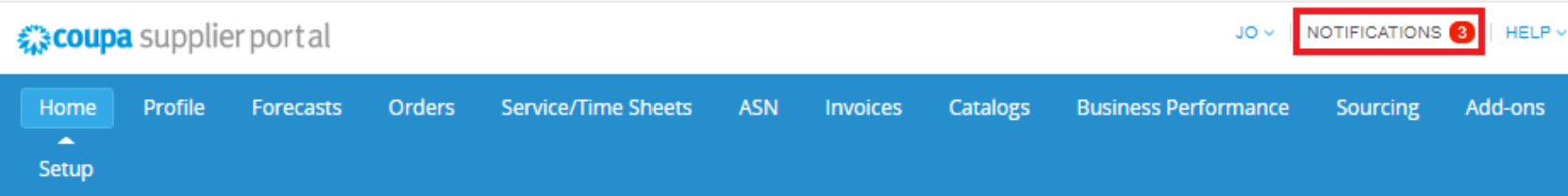
Under My Account > Security & Mutli Factor Authentication you can change the current setting for additional security of your CSP account.

1. **My Account** - Click on the down arrow next to My Account then click **Notification Preferences**
2. **Security & Multi Factor Authentication** is located under the left nav after clicking **Notification Preferences**.
3. **Multi Factor Authentication** – here you can enable or disable and select how you would like to receive the verification codes either via authenticator app or via sms.



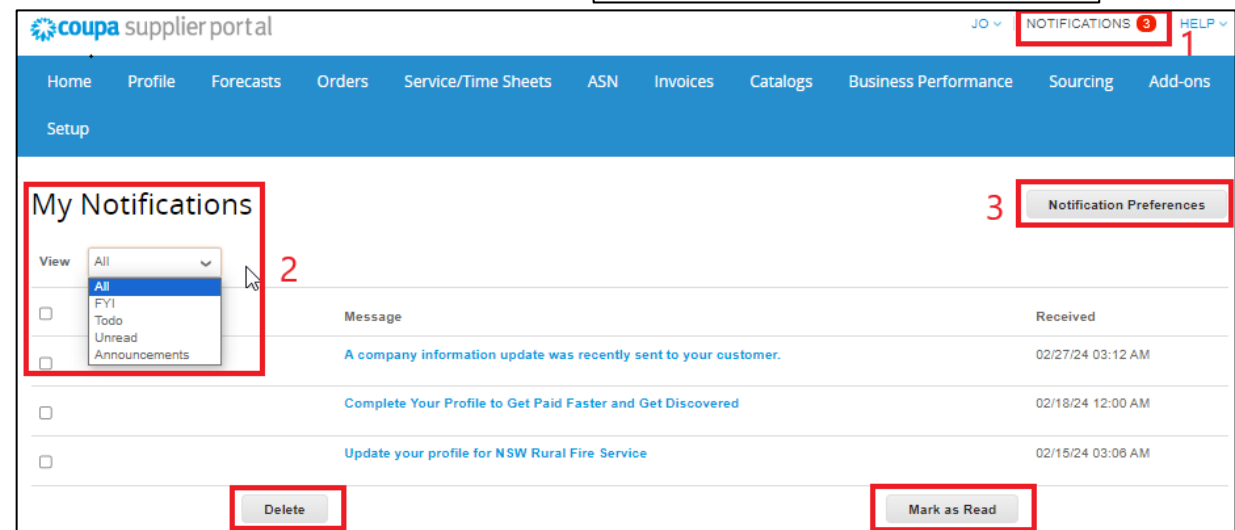
SIM – Notifications

Notifications - here you can view your notifications and see what is new



Under **Notifications** you can view new messages and change your notification settings.

1. **Notifications** - You can hover the Notifications link to see your unread system messages. Only 3 most recent ones are shown.
2. **See all Notifications** – click on the **See all Notifications** when you hover over **Notifications** link or view all the notifications with their details and to manage them, click on **Notifications** link and then view **All** from the drop down. You can select and **delete**, or **mark as read**.
3. **Notification Preference** – click on the **Notification Preferences** button to change your setting. You can also access this via **My Account**.
Once you have enabled and disabled the notifications you would like to receive – click **save**.



SIM – Coupa Home tab

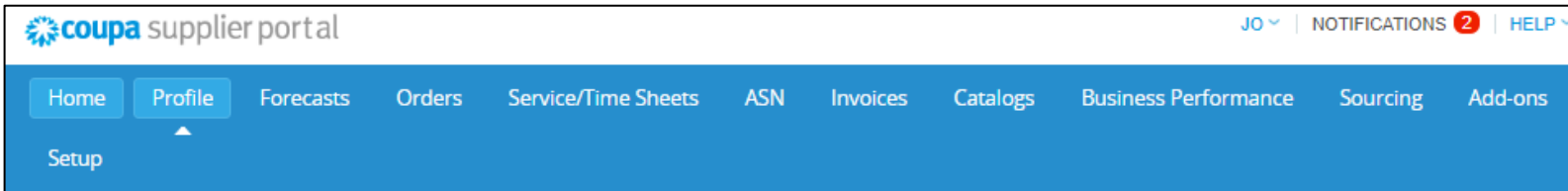


Home tab – under this main page includes all access, you can view and improve your public company profile, view recent activity & announcements

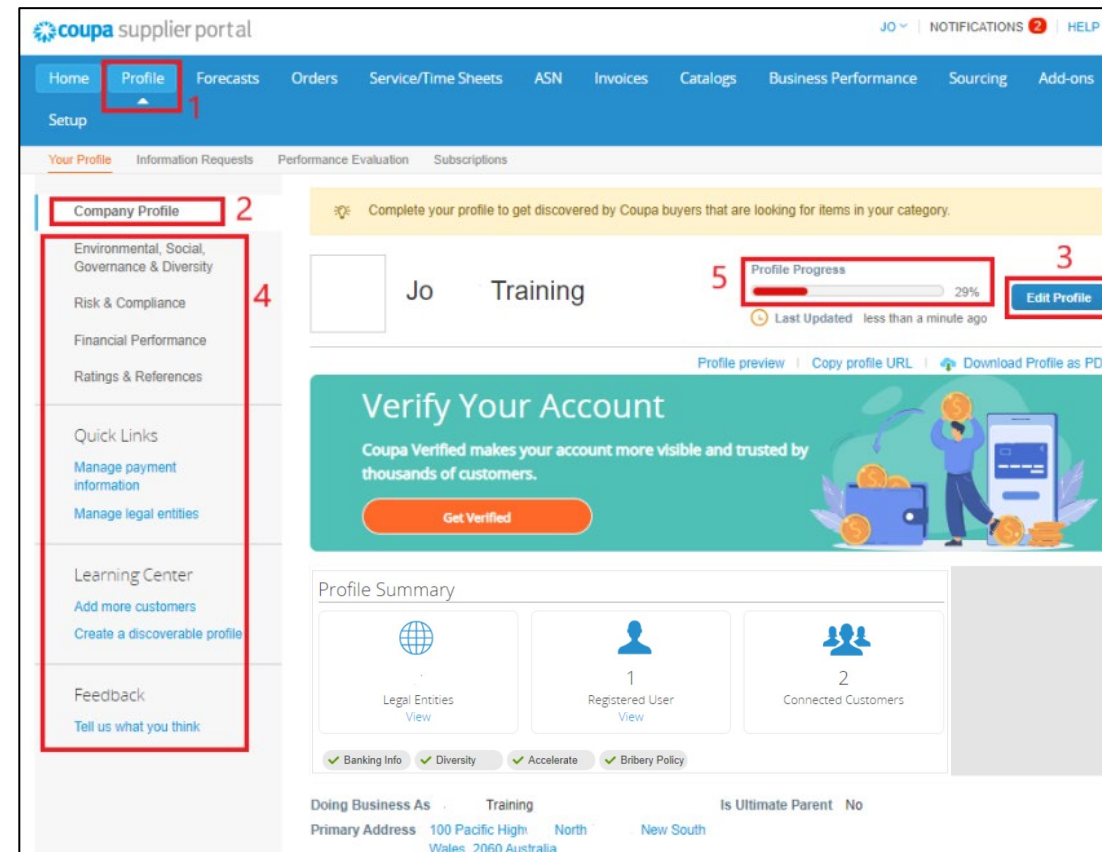
A screenshot of the Coupa Supplier Portal Home tab. The page has a blue header with the 'coupa supplier portal' logo and navigation links: Home (highlighted with a red box), Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below the header is a 'Verify Your Account' banner with a 'Get Verified' button. The user profile for 'Jo Training' is shown with a 'Get Verified' button and profile progress information. The 'Recent Activity' section lists information requests from 'NSW Rural Fire Service' with status indicators like 'Submitted' and 'Due Now'. The 'Announcements' section shows 'No Announcements'. At the bottom, there are four summary cards: 'Two Factor Security' (1 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection). A red watermark 'example only' is overlaid on the activity section.

SIM – Coupa Profile tab

Profile tab – This section relates to your Company profile. Here you can manage your public profile on the Coupa Portal. Your public profile is visible to Coupa users in the Supplier Directory. Also see [Coupa Compass](#)



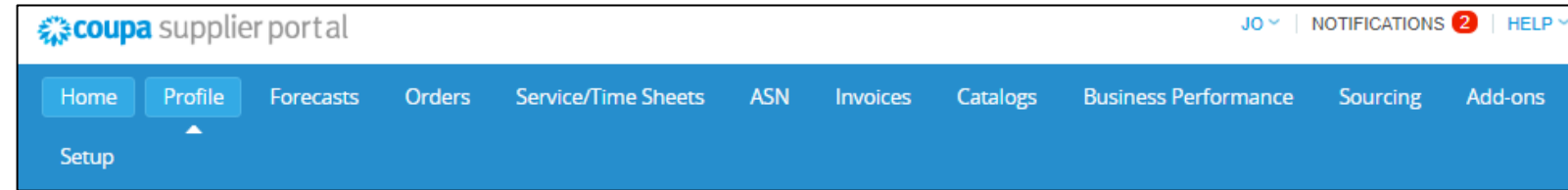
1. **Profile Tab** – here you can create your public profile to let customers know what your business does
2. **Company Profile** – give customers background information about your business.
3. **Edit Profile** – select the edit profile button to update your information or edit each individual section from the left nav bar
4. **Left Navigation bar** – here you can complete additional information by clicking on the relevant sections.
5. **Profile Progress** – this indicator provides a summary of how complete your profile is and when the profile was last updated.



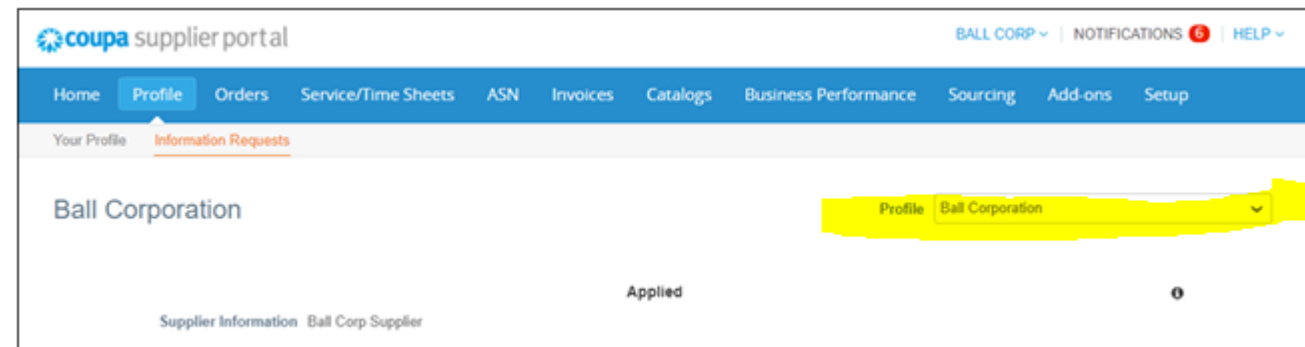
SIM – Coupa Profile tab



Profile tab > Information Request - This section relates to the supplier updating their information with the customer.
(Update a profile from an information request)



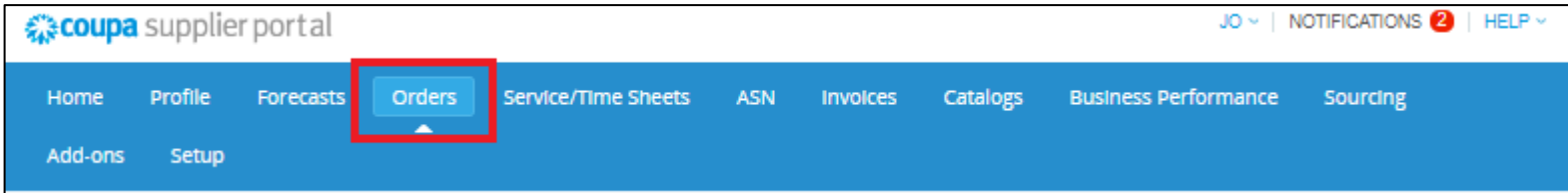
- 1. Profile Tab – Information Request** when RFS request information from you the supplier, you will see Information requests in a sub header under your profile. You can also access Information Request by clicking links in notifications.
- 2. Profile** - In the Profile drop down, make sure RFS is selected.
- 3. Information Request** - any pending requests appear on this page – click into the request, complete and then submit





Scroll to the bottom of the form and click update info
The form is now editable and all fields within the form can be updated
Note – if the form is still pending approval from RFS, the button will say withdraw.

SIM – Coupa Orders tab

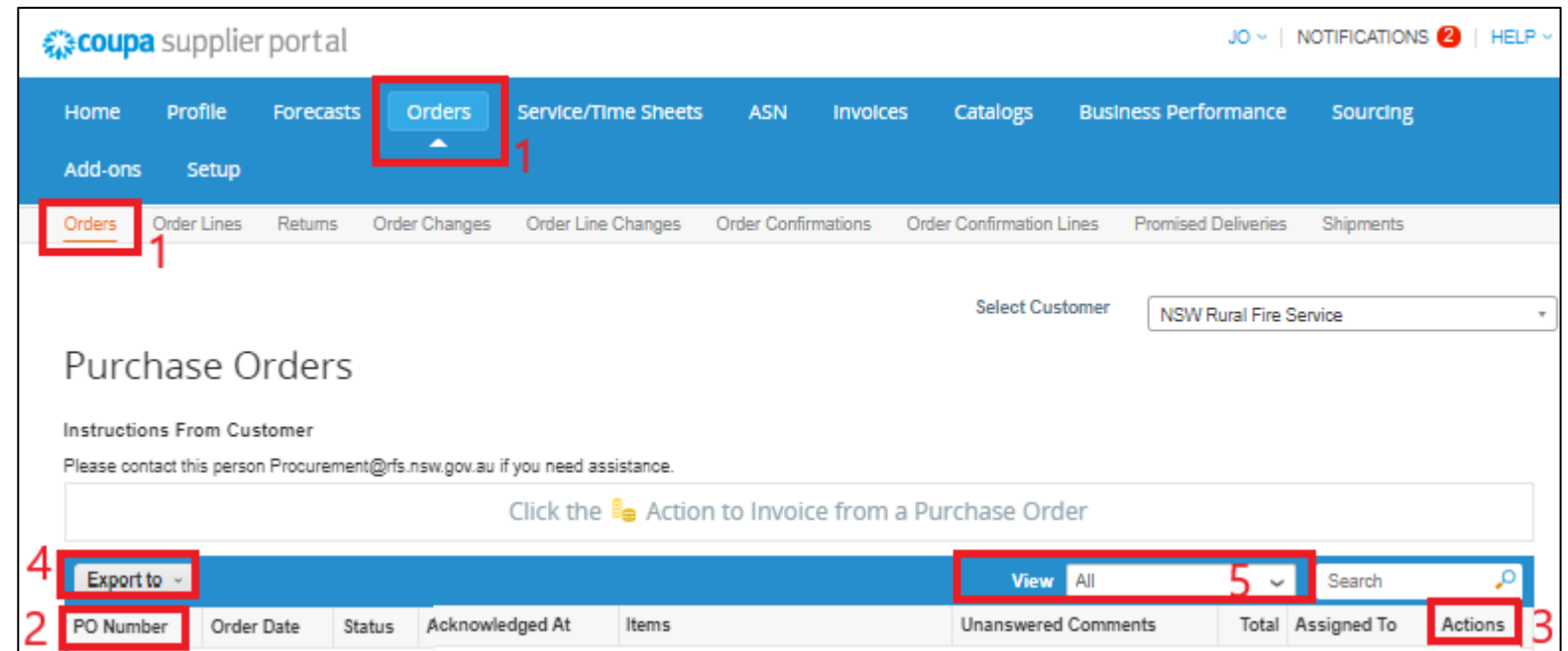
Orders tab – here you can manage your Purchase Orders (PO's) you have received from RFS



1. **Orders** – here you will be able to see the history of POs
2. **PO Number** – to view details of the order, click on the order number you wish to review.
3. **Actions** – you can create invoices & credit notes under the action section by clicking on the relevant icon

	Create (flip PO into) an invoice
	Create credit note

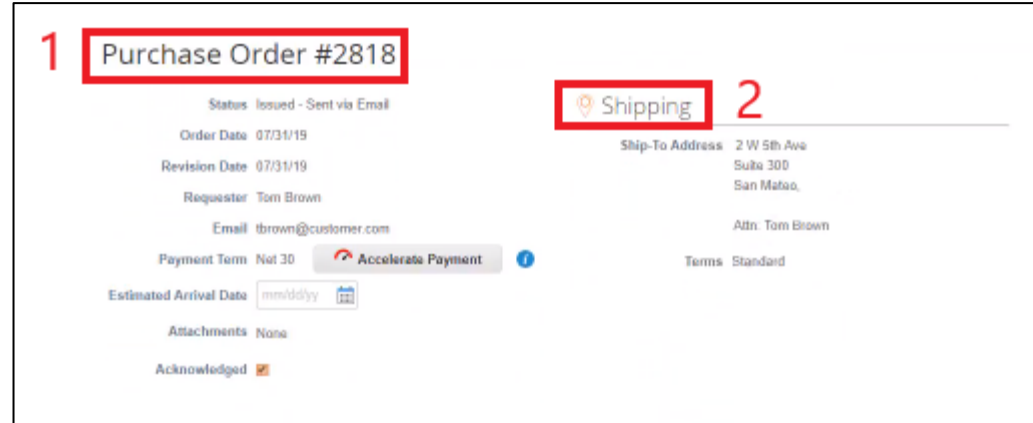
4. **Export to** – run report to excel
5. **View** – you can customise your view by clicking the down arrow & selecting



SIM – Coupa Orders tab

Orders tab – here you can review the information contained in a Purchase Order.

1. **PO display** – click the PO number you wish to view and drill down on this will display a description of the order including the status.
2. **Shipping** – the address linked to the PO will be visible under the Shipping section.
3. **Lines** – if there are separate lines or items in the PO you will see them displayed here.
4. **Create Invoice, Save or Print View** – these are the options for processing the purchase order



1 **Purchase Order #2818**

Status: Issued - Sent via Email

Order Date: 07/31/19

Revision Date: 07/31/19

Requester: Tom Brown

Email: tbrown@customer.com

Payment Term: Net 30 [Accelerate Payment](#)

Estimated Arrival Date:

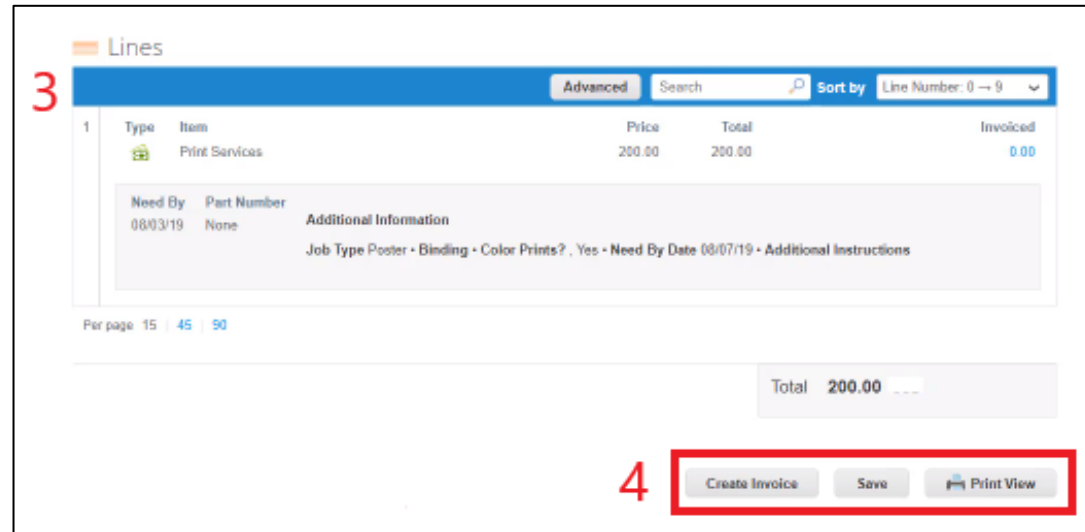
Attachments: None

Acknowledged

2 **Shipping**

Ship-To Address: 2 W 5th Ave
Suite 300
San Mateo,
Attn: Tom Brown

Terms: Standard



3 **Lines**

Advanced Search Sort by Line Number: 0 - 9

Type	Item	Price	Total	Invoiced
	Print Services	200.00	200.00	0.00

Need By: 08/03/19 Part Number: None

Additional Information: Job Type Poster • Binding • Color Prints? • Yes • Need By Date 08/07/19 • Additional Instructions

Per page: 15 | 45 | 90

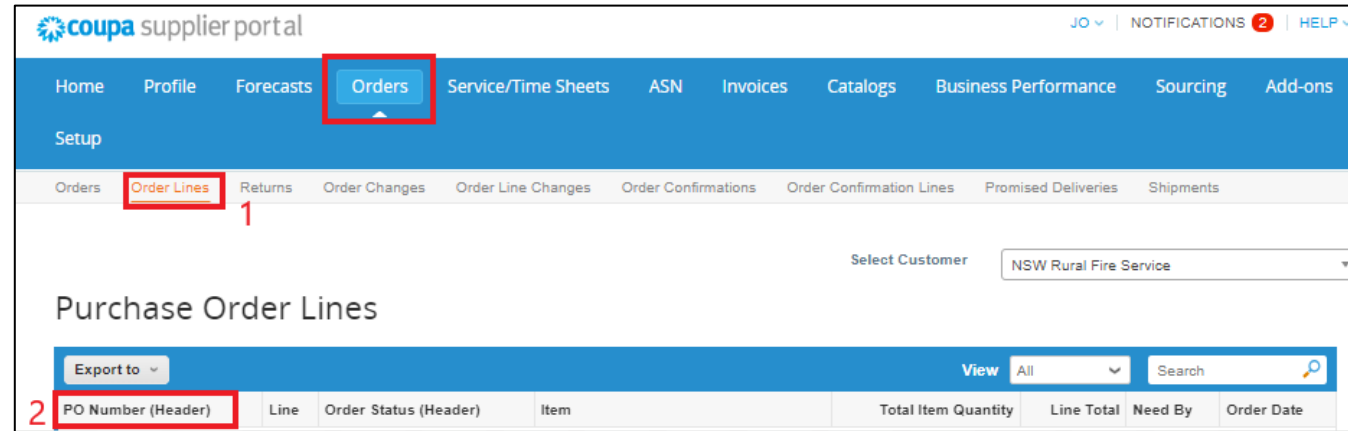
Total: 200.00

4 **Create Invoice** **Save** **Print View**

SIM – Coupa Orders tab

Orders tab – here you can view Order Lines and Order Changes

1. **Order Lines** – here you will find the history of order lines associated to POs
2. **PO Number (Header)** – the Purchase orders will be listed under here by number.
3. **Order changes** – here you will be able to view changes to PO
4. **PO changes** – the changed Purchase orders will be listed under here by number



coupa supplier portal

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

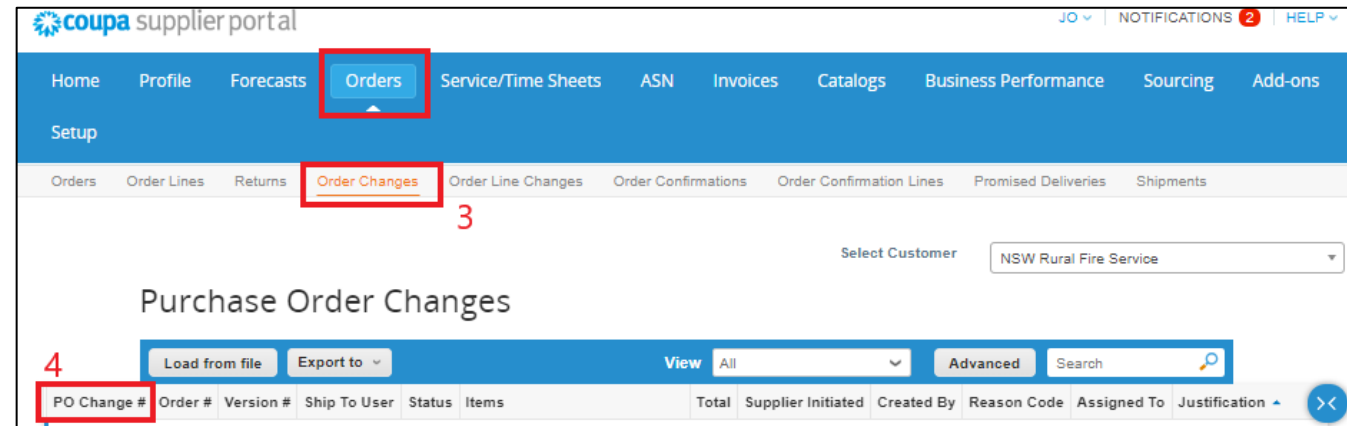
Orders **Order Lines** Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer NSW Rural Fire Service

Purchase Order Lines

Export to View All Search

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total	Need By	Order Date
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coupa supplier portal

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

Orders Order Lines Returns **Order Changes** Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer NSW Rural Fire Service

Purchase Order Changes

Load from file Export to View All Advanced Search

PO Change #	Order #	Version #	Ship To User	Status	Items	Total	Supplier Initiated	Created By	Reason Code	Assigned To	Justification
--------------------	---------	-----------	--------------	--------	-------	-------	--------------------	------------	-------------	-------------	---------------

Note – suppliers will not be able to make changes on POs, this option is disabled. You will be able to view change

SIM – Coupa Orders tab

Orders Status – PO's can have the following statuses. What does the status mean?

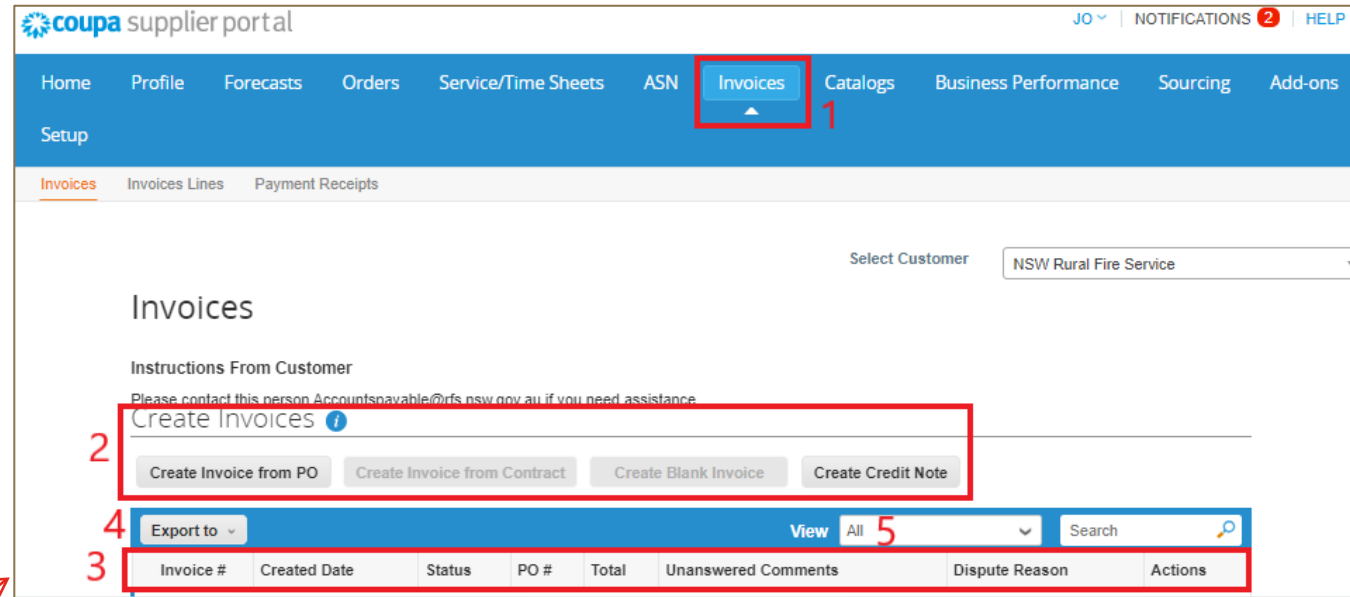
STATUS	DESCRIPTION
Issued	The PO was approved and sent to you
Buyer Hold	The PO is approved but requires your Coupa customer to review it
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status
Closed	The issued PO was received and then closed, either manually or automatically within Coupa
Cancelled	The PO was cancelled and does not need to be fulfilled
Error	Something is wrong with the PO. Contact RFS to get the PO back on track

SIM – Coupa Invoices tab

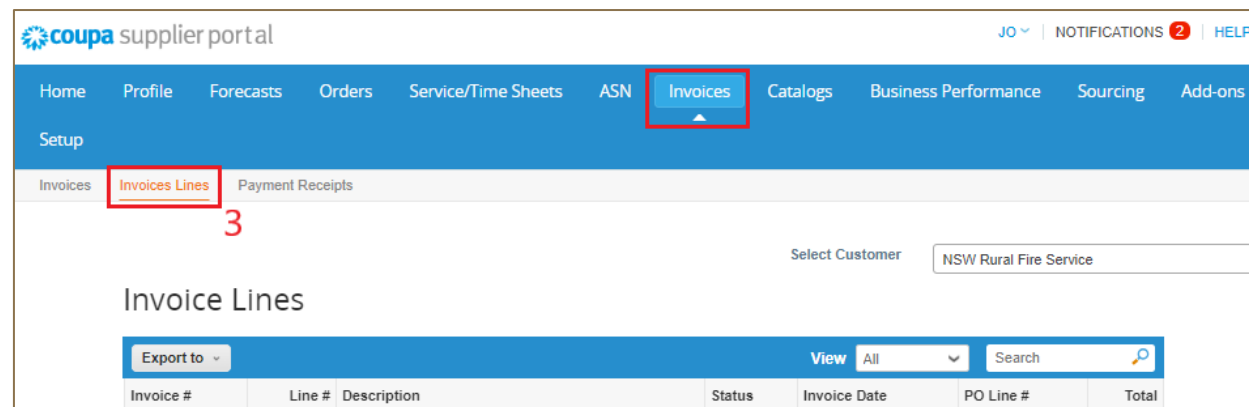
Invoices tab – here you can view the invoices that have been created. To generate a new invoice, you must enter through the orders tab. It may take up to 24 hours for a payment to appear in the CSP after it has been processed. RFS normally process a weekly payment run.

1. **Invoices** – here you will find the history of invoices
2. **Create Invoices** – you have several selections to choose from **Create invoice from PO & Create credit note**
3. **Invoices lines** – you will find general information on the invoices you have made and their status. Click Invoices line to see more info.
4. **Export to** – run a report to excel
5. **View** – you can customise your view by clicking the down arrow & selecting

Note – To generate a new invoice, you must enter through the orders tab



The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted with a red box and '1'), 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. A 'Select Customer' dropdown menu is set to 'NSW Rural Fire Service'. The main heading is 'Invoices'. Below it, there is a section for 'Instructions From Customer' with a link to 'Please contact this person Accounts@rfs.nsw.gov.au if you need assistance'. A red box labeled '2' highlights the 'Create Invoices' section, which contains four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below this, there is an 'Export to' dropdown menu (labeled '4') and a 'View' dropdown menu (labeled '5') set to 'All'. A table header is visible with columns: 'Invoice #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', 'Dispute Reason', and 'Actions'. A red box labeled '3' highlights the table header.

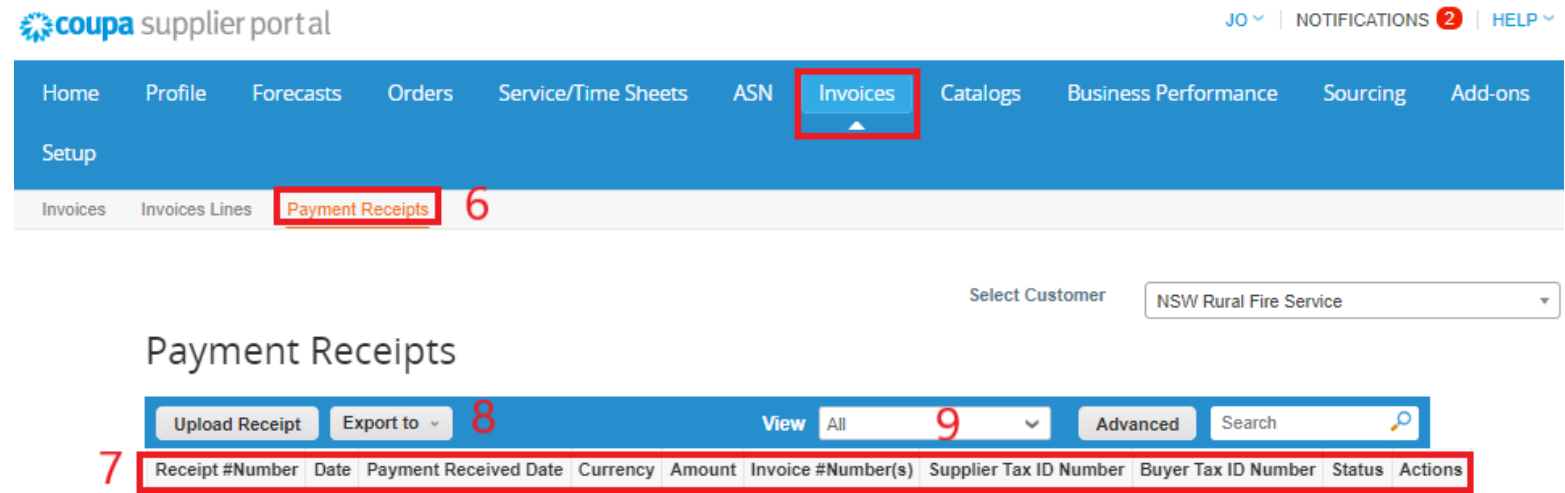


The screenshot shows the 'coupa supplier portal' interface. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines' (highlighted with a red box and '3'), and 'Payment Receipts'. A 'Select Customer' dropdown menu is set to 'NSW Rural Fire Service'. The main heading is 'Invoice Lines'. Below it, there is an 'Export to' dropdown menu (labeled '4') and a 'View' dropdown menu (labeled '5') set to 'All'. A table header is visible with columns: 'Invoice #', 'Line #', 'Description', 'Status', 'Invoice Date', 'PO Line #', and 'Total'.

SIM – Coupa Invoices tab

Invoices / Payment Receipts tab – here you can view the status of your payments by navigating to the payment receipts tab. Each payment is linked to the associated invoices for easy reconciliation.

6. Under the **Invoices** tab select **Payment Receipts** – here you will find the history of payments made with the receipt number.
7. **Payment Receipts line** – you will find general information on the payment and their status. Click the individual receipt to see more info.
8. **Export to** – run a report to excel
9. **View** - you can customise your view by clicking the down arrow & selecting



The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'JO | NOTIFICATIONS 2 | HELP' is on the right. A blue navigation bar contains the following tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a red box), Catalogs, Business Performance, Sourcing, and Add-ons. Below this, a sub-navigation bar shows 'Invoices', 'Invoices Lines', and **Payment Receipts** (highlighted with a red box and a red '6' next to it). A 'Select Customer' dropdown menu is set to 'NSW Rural Fire Service'. The main heading is 'Payment Receipts'. Below the heading is a toolbar with 'Upload Receipt', 'Export to' (with a red '8' next to it), 'View' (with a dropdown menu set to 'All' and a red '9' next to it), and 'Advanced' with a search icon. A table header is highlighted with a red box and a red '7' next to it, containing the following columns: Receipt #Number, Date, Payment Received Date, Currency, Amount, Invoice #Number(s), Supplier Tax ID Number, Buyer Tax ID Number, Status, and Actions.

SIM – Coupa Invoices tab

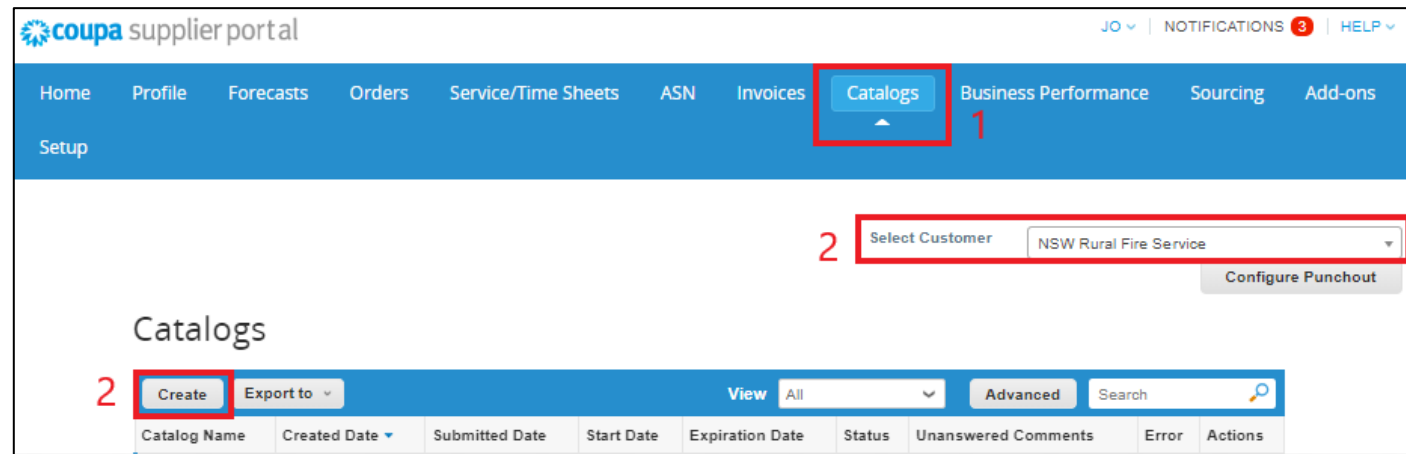
Invoices Status – Invoices can have the following statuses. What does the status mean ?

STATUS	DESCRIPTION
Draft	The invoice has been created, but not yet submitted to RFS and can still be edited
Pending Approval	The invoice is currently under review & awaiting approval for payment by RFS
Approved	The invoice has been accepted/approved for payment by RFS
Processing	The invoice is being processed by AP, submitted and received by RFS and should be paid soon
Disputed	The invoice has been disputed by RFS
Voided	The invoice not valid, something is wrong (status of invoice once resolution of a disputed invoice)

SIM – Coupa Catalogs tab

Catalogs tab – here you can create, manage and update Catalogues in the CSP which will undergo approvals in Coupa. Please discuss Catalogs with RFS Procurement by emailing procurement@rfs.nsw.gov.au

1. **Catalogs** – are managed by RFS
2. **Create (manual)** – select customer from the drop down and then click create
3. **Enter info** – enter the Catalogue name, start date, expiry date and currency.
4. **Create (Load from file)** – to create from a file you can insert data into an excel template, save and start upload



coupa supplier portal

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices **Catalogs** Business Performance Sourcing Add-ons

Setup

Select Customer NSW Rural Fire Service **2** Configure Punchout

Catalogs

2 Create Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
--------------	--------------	----------------	------------	-----------------	--------	---------------------	-------	---------



Select Customer R28 Coupa Configure Punchout

Initech Catalog 3 Edit

Customer R28 Coupa

Catalog Name Initech Catalog 3

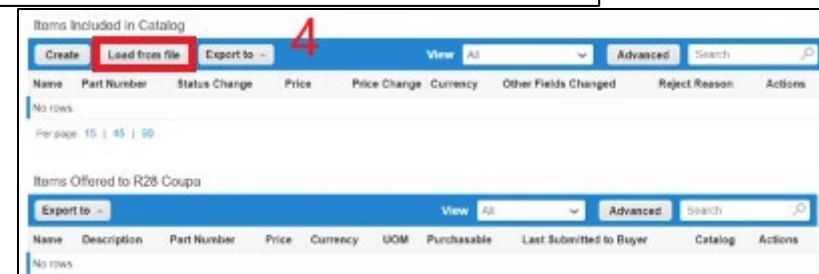
Status Draft

Start Date date when catalog prices become effective **3** enter the details into the fields

Expiration Date date when catalog prices become expire

Currency USD

Back



Items Included in Catalog

4 Create Load from file Export to View All Advanced Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
No rows								

Per page 15 | 45 | 90

Items Offered to R28 Coupa

Export to View All Advanced Search

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
No rows									

SIM – Coupa Setup tab > Users



Setup tab > Users – here you can invite new users from your company and grant users their permissions & customer connections

1. **Set up** – click the **Setup** button which takes you into Admin section.
2. **Users** – select **Users** from the left nav.
3. **Invite Users** – click the **Invite User** button, you will be prompted with Multi factor authentication if turned on. **Invite User** window will appear - fill in the information of the user you which to add, then grant permissions and customer access by click the box with a tick to enable and disable.
4. **Send Invitation** – once done click the **Send invitation** button

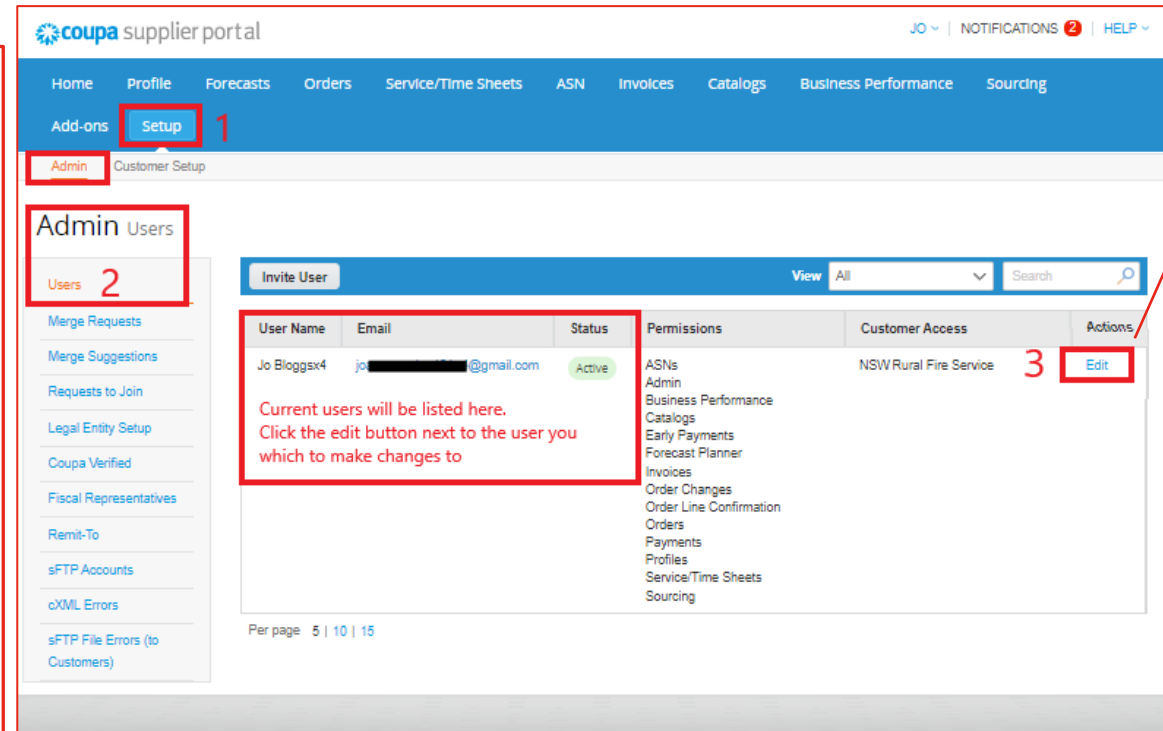
The screenshot displays the Coupa Supplier Portal interface. At the top, the 'Setup' button is highlighted with a red box and the number 1. Below it, the 'Admin Users' section is highlighted with a red box and the number 2. The 'Invite User' button is highlighted with a red box and the number 3. The 'Invite User' modal window is open, showing fields for First Name, Last Name, and Email. The 'Permissions' and 'Customers' sections are visible, with various options checked. The 'Send Invitation' button is highlighted with a red box and the number 4.

User Name	Email	Status	Permissions	Customer Access
Jo Bloggs	jo.bloggs@rfs.nsw.gov.au	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service

SIM – Coupa Setup tab > Edit

Setup tab > Edit – here you can edit users - change their permissions & customer connections

1. **Set up** – click the **Setup** button which takes you into Admin section.
2. **Users** – select **Users** from the left nav.
3. **Edit** – click the **Edit** button next to the user you which to modify/change. The **Edit User access for [name]** window will appear– enable or disable the permissions or customers setting by click on the box with a tick.
4. **Save** – once done click the **Save** button



coupa supplier portal

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing

Add-ons **Setup** 1

Admin Customer Setup

Admin Users

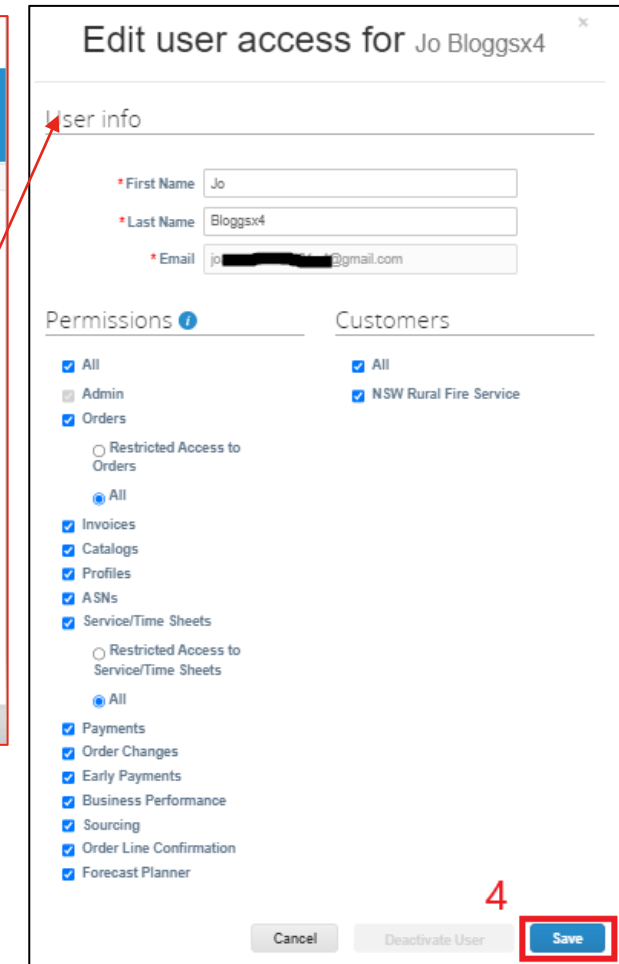
Users 2

Invite User View All Search

User Name	Email	Status	Permissions	Customer Access	Actions
Jo Bloggsx4	jo [REDACTED]@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service	3 Edit

Current users will be listed here.
Click the edit button next to the user you which to make changes to

Per page 5 | 10 | 15



Edit user access for Jo Bloggsx4

User info

* First Name Jo

* Last Name Bloggsx4

* Email jo [REDACTED]@gmail.com

Permissions Customers

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Order Line Confirmation

Forecast Planner

Cancel Deactivate User **4 Save**

Coupa Support

At any time while completing the onboarding process you need to speak with someone you can click the Chat with Coupa Support located at the bottom right-hand side of your screen.



For any general CSP technical or functional question you can try searching in the [Supplier Help Centre](#) otherwise if you can't find the answer there, then you can contact the Couper Supplier Support Team at supplier@coupa.com

For more information about Coupa, Supplier can visit the [Coupa Supplier Page](#)

While logged into the CSP – you can also click the **Help** tab for **Help Tour**, **Blog** and **Online Help** this will navigate to the Coupa Success Portal

