

# Registration and Onboarding

## A Guide for WV Suppliers, Partners, and Sub-Grantee

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version 1.0

This document is a step-by-step guide for World Vision’s suppliers, Partners, and subgrantees (hereinafter referred to as suppliers) in the onboarding process. Please read this document in its entirety.

World Vision (WV) is committed to a paperless source-to-pay process enabled by Coupa. Coupa is a cloud-based spend management platform that facilitates World Vision’s procurement and invoicing processes.

If you are a new supplier, partner or subgrantee who has successfully gone through World Vision’s qualification process, please follow the onboarding invitation email from “**Coupa Supplier Portal <do\_not\_reply@supplier.couphost.com...>**” with the subject “**World Vision International Profile Information Request – Action Required**”

### Preparation before responding to WV’s invitation email

1. Before responding to WV’s invitation email to register, please read this document in its entirety to understand what information will be required during the registration process.
2. If you did not receive the invitation email from World Vision, check your spam folder or contact your World Vision Buyer to verify the contact email address we have on file for you is correct and request the Buyer to resend the information request to you.
3. You may forward this invitation email to another member of your team who has access to the requested information
4. Please have electronic copies of the following documents on hand. You will be asked to submit these documents as part of the supplier onboarding process
  - a. Copy of your business registration – If you do have an official Business Registration, you must have an approved exception from World Vision. Please contact your Buyer if you do not have a copy of the business registration.
  - b. Copy of your Tax ID / Tax registration
  - c. Copy of your voided check or Bank statement that shows your company’s legal name and bank account number

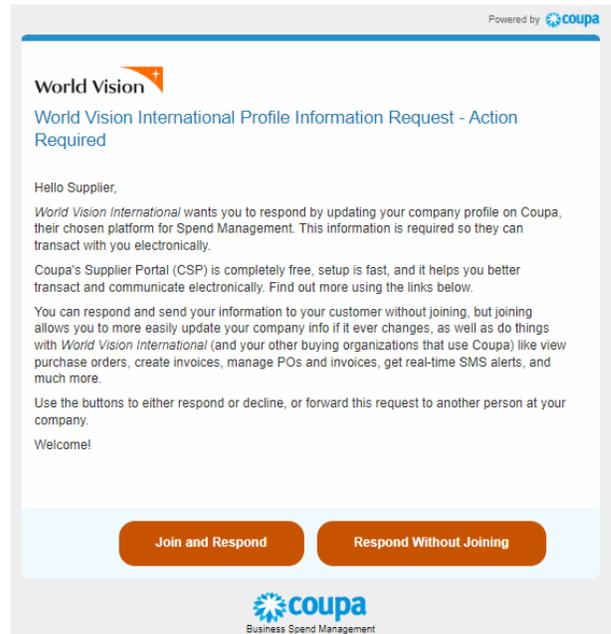
## STEP 1: Invitation Email

To begin the process, check your email inbox from Coupa Supplier Portal. See the sample invitation email image to the right.

If this is your very first time receiving this invitation, you will see two buttons to register as a supplier with World Vision:

### 1. Join and Respond

This button will allow you to create an account with [Coupa Supplier Portal](#) (CSP). Joining CSP will allow you to manage your purchase orders from World Vision (WV) and electronically submit invoices directly from your CSP home page. Click on the link [here](#) to learn more about CSP. Once your CSP account is created, you can proceed to STEP 2 below.



**NOTE:** Coupa Supplier Portal (CSP) will require you to create a username and password. You must enter your username and password the next time you log in to CSP. Click [here](#) for instructions to log in to your CSP account. You will be asked to establish a two-factor authentication the first time you use CSP using a QR code. The reason for this two-step authentication is to protect your personal information and strengthen the security access to your account.

### 2. Respond without Joining

The second method is to **“Respond without Joining”**. This button will open up a secure online form for you to complete and submit your information in STEP 2. Note that if you have already created an account with CSP, this button will not be visible on the email invitation.

## STEP 2: Fill out the Registration Form

This Supplier Registration is an important first step to conducting business with World Vision. Below is a list of all the data fields and its description to aid you in completing the SIM Supplier Form.

All required fields are marked with an “asterisk.” Please fill out the form thoroughly and provide all the necessary documentation to avoid any delay.

## Supplier Information

1. **Legal Company Name:** Legal/Registered name of the company. Legal name must have the same spelling as it appears on your business registration.
2. **Payment Terms:** The number of days in which the supplier should be paid by the terms negotiated in the contract. This information is provided by WV Buyer and is available here for your information only. Contact your WV Buyer, if you have any questions.
3. **Preferred Payment Method:** Indicate your preferred mode of payment. The drop-down list includes the following options: Bank Transfer, Cheque, Mobile Money
4. **PO Email:** Enter your e-mail address to which World Vision will send a purchase order. This email cannot be a World Vision e-mail.
5. **Invoice Sender E-Mail:** provide the e-mail address or domain name from which you will send invoices to World Vision. Our system will only accept invoices sent to us from this designated e-mail address. This cannot be a World Vision e-mail.

Manage your profile and more with Coupa. [Create Your Account](#)

World Vision

Supplier Information MARY ANN CHAN

Supplier Information

This form is intended for suppliers to provide information for update/onboarding purposes.

\* Legal Company Name   
Legal/Registered Name of the Company

Payment Terms

This shows the number of days in which the supplier should be paid in accordance with the terms negotiated in the contract

\* Preferred Payment Method   
Indicate the mode of payment the Supplier prefers to be paid

PO Email  i  
Enter the E-mail address where Purchase Orders will be sent

Invoice Sender email   
Enter the E-mail address or domain name that will submit invoice to WV

## \* Primary Contact Information

6. **First Name:** Contact person's first name
7. **Last Name:** Contact person's last name (surname)
8. **E-Mail Address:** Contact person's E-mail, or general company email. This is a mandatory field and cannot be a World Vision E-mail.
9. **Work Phone:** Contact person's work number
10. **Mobile Phone:** Contact person's mobile number
11. **Organizational Type:** This field is for internal WV use only.
12. **Preferred Currency:** This is the currency in which you prefer to receive payment. It must be the same as the currency of your Bank provided in the Remit-to information below.
13. **Shipping Terms (Incoterms):** These are International Commercial Terms or Shipping Terms used for sending goods to World Vision, if applicable. Skip this question if you only provide services. Select how the goods are going to be sent to the country of destination. Available options in the drop-down list include:
  - a. ExWorks

\* Primary Contact Information

\* First Name   
First Name of Contact Person

\* Last Name   
Last Name (Surname) of Contact Person

\* Email address  i  
Email Address of Contact Person

Work Phone  Other   
Country/Region/Area/City Local Extension (optional)

Work phone number of Contact Person

Mobile Phone  US/Canada   
650-555-1212  
Mobile Phone number of Contact Person

Organization Type

For GCO and VGC use only. This indicates the type of organization which the Global Supplier fall under.

\* Preferred Currency

Indicate the Currency which the Supplier would like to be paid in. This currency will be the one to be saved in the Supplier profile.

Shipping Terms (Incoterms)

Select the means in which the goods are going to be sent to the country of destination.

\* Business registration ID   
Please input the business registration number as evidence that the business is officially registered with the authority.

Attachment  No file chosen  
Please attach your Business ID & Tax ID related documents. ZIP folder are acceptable

- b. Free Carrier
- c. Carriage Paid to
- d. Carriage and Insurance Paid to
- e. Delivered at Terminal
- f. Delivered at Place
- g. Free Alongside Ship
- h. Free on Board
- i. Cost and Freight
- j. Cost, Insurance, and Freight
- k. Delivered at Place Unloaded

14. **Business Registration ID:** Input the business registration number as evidence that the business is officially registered with the local authority. Suppliers who do not have a Business Registration must obtain an exception to WV’s policy from your designated WV Buyer.
15. **Business Registration Attachment:** Upload a digital copy of your official Business Registration.

## Tax Registration

16. **Add Tax Registration:** Click on **Add Registration** Button to enter your Registered Tax Number. This is the tracking number that government entities use for tax-related purposes. Upon clicking the “Add Tax Registration” button it will prompt you complete to the following fields

- a. **Country:** Country of business registration
- b. **Number:** Tax Number of your business. If none, enter ‘000000’
- c. **Local:** **DO NOT** tick this field. If this box is ticked you may get an error message *“Local tax number (XXXXX) must be for the same country/region as the associated address ()”*.

17. **Type:** If you will be doing business with a World Vision entity in the US, select the appropriate W8 or W9 in the drop-down; otherwise, you can ignore it.

- a. Use the **W8 form** for Non-US based suppliers doing business in the US. If you are a U.S. citizen based internationally, please submit a completed W-9 tax form instead (point “b” below). If your company was formed or incorporated outside the U.S. and your company’s/organization’s work for World Vision will take place within the U.S. or its territories, please attach a completed and signed W-8BEN-E tax form. Click here for the link to download the W8 form: [Form W-8 BEN \(Rev. October 2021\) \(irs.gov\)](https://www.irs.gov/pub/irs-pdf/fw8ben.pdf)
- b. Use the **W9 form** for US-based suppliers doing business in the US. Click here for the link to download the W9 form: [Form W-9 \(Rev. October 2018\) \(irs.gov\)](https://www.irs.gov/pub/irs-pdf/fw9.pdf)

The screenshot shows a web form titled "Tax Registrations". At the top, it says "Use this section to add all your applicable tax registrations." Below this is a button labeled "Add Tax Registration". Underneath the button, it says "Tax Form Attachment - US Suppliers only". There is a "Type" dropdown menu and buttons for "Attachments", "Add", and "File". Below this, there is a section for "If supplier will do business in the US, download the appropriate W8 or W9 form and attach here". This section contains three rows, each with a "Form Link" label and a link to a PDF form: "W8 Form Link" with the link "https://www.irs.gov/pub/irs-pdf/fw8ben.pdf", "W9 Form Link" with the link "https://www.irs.gov/pub/irs-pdf/fw9.pdf", and "World Vision code of conduct" with the link "https://www.wvi.org/suppliers/code-conduct". At the bottom, there is a checkbox labeled "I agree to WV Code of Conduct".

18. **Attachments:** The W8 and W9 form are provided in the links above (17a and 17b). Download the form that corresponds with your status, complete the form, save it to your hard drive then upload it here.

**NOTE:** W8/W9 attachment is required for any suppliers conducting business in the U.S. to be paid by World Vision International based in the US. Your Response form will be rejected if this is not attached.

19. **WV Code of Conduct:** You can review the WV's code of conduct by clicking the link below:  
<https://www.wvi.org/suppliers/code-conduct>
20. **I Agree to the WV Code of Conduct:** You must check this Box in order successfully submit your registration form.

## Remit-to Address

Remit-to is information you provide to World Vision informing us where to send a payment. If you already have a CSP account, a pop-up window will prompt you to choose an existing Remit-to Address or Create a New Remit-to Address. You can just click "Cancel" button to continue and fill out the fields manually.

21. **Add Remit-to:** Click on Add Remit-to button to provide your payment information.
22. **Address Name:** Remit-to / Billing Address Name
23. **Street Address:** Remit to street address if available
24. **Street Address 2:** continuation of Remit-to Address
25. **City:** City of your Remit-to Address
26. **State or Region:** Geographic location of remit-to address
27. **State ISO Code:** this is not editable you can ignore this field
28. **Postal Office:** Postal Code of Remit-to Address
29. **Bank Name:** Name of Bank where payment should be made

\*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

**Add Remit-To**

\*Remit-To Address

Remit-to (Payee Address) for Payment

\* Address Name   
Remit-to/Billing Address Name

\* Street Address   
Street Address 2   
Continuation of remit-to street address, if needed

\* City   
City of remit-to address

\* Region  
Country/Region   
State Region   
State ISO Code   
Geographic location of remit-to address

Postal Code

30. **Beneficiary Name:** Name of the account holder
31. **Bank Account Number:** Bank Account Number where payment should be made
32. **Bank Routing Number:** Unique nine-digit number which functions as an address for your bank. Used for electronic transactions (fund transfers, direct deposits, digital checks, and bill payments). Leave this field blank if you do not have Bank Routing Number.
33. **SWIFT Code (BIC):** Skip this field if you will not be conducting an international transaction with World Vision. SWIFT code is a global Bank identifier which securely verifies a specific bank or an international transaction. This data is necessary for international funds transfers. Call up your bank if you don't know your Bank's SWIFT code or you can visit

The screenshot shows a form with the following fields and labels:

- \* Bank Name** (text input) - Name of Bank payment should be made to
- \* Beneficiary Name** (text input) - Supplier Account number - Account number payment should be made to
- \* Bank Account Number** (text input) - Supplier Account number - Account number payment should be made to
- Bank Routing Number** (text input)
- SWIFT Code (BIC)** (text input)
- IBAN Number** (text input)
- Bank Branch Name** (text input) - Please input the bank branch name here, if needed.
- Priority code** (text input) - None
- Supplier Category (S1)** (text input) - None Vendor
- Income Tax Type (S2)** (dropdown menu) - Select
- Bank Sub Code** (text input) - None
- Bank Sort Code** (text input) - None

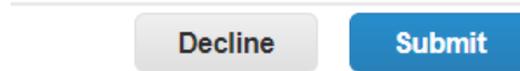
<https://www.thswiftcodes.com/> to check the Bank's Swift Code.

**NOTE:** Please do not put space or any special characters or it will prompt an error

34. **IBAN Number:** Skip this field if you will not be conducting an international transaction with World Vision. IBAN is an International Bank Account Number – a standard international numbering system developed to identify an overseas bank account. The number starts with a two-digit country code, then two numbers, followed by several more alphanumeric characters. Note that an IBAN does not replace a bank's account numbering, as it's only meant to provide additional information that helps in identifying overseas payments. This is only required for payment internationally. You may ask your local bank for the IBAN or leave this blank if you don't know your IBAN.
35. **Bank Branch Name:** Name of the Bank's Branch if available
36. **Priority Code:** this is an internal data field used by WV for our analysis. This field is not editable
37. **Supplier Category (S1):** This is an internal data field used by WV for our analysis. This field is not editable.
38. **Income Tax Type (S2):** This is an internal data field used by WV for our analysis. This field is not editable
39. **Bank Sub Code:** This is an internal data field used by WV for our analysis. This field is not editable
40. **Bank Sort Code:** This is an internal data field used by WV for our analysis. This field is not editable. If your bank has a sort code, please provide that information in the Comment box.

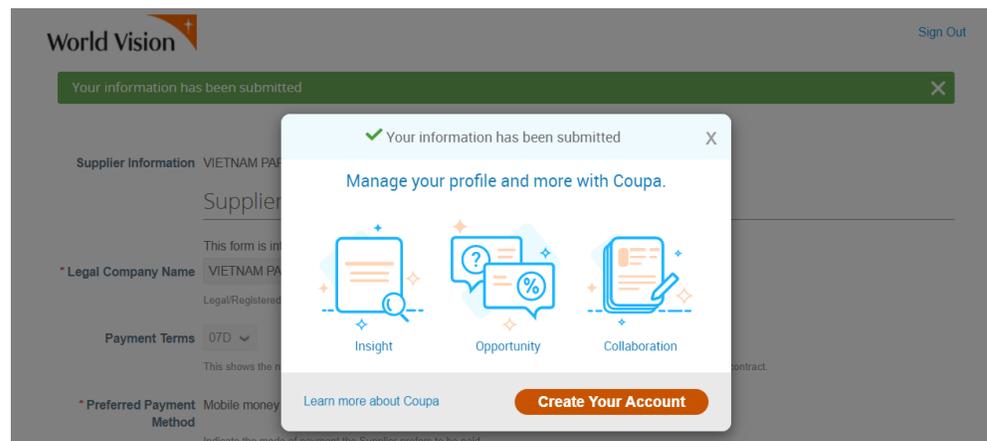
### STEP 3: Submit your form

You **MUST** click “**Submit**” to send your information to World Vision. If you choose “Decline” or fail to click “submit”, your information will not be sent to World Vision.



You will see a confirmation pop-up box confirming that your information has been submitted (see screen shot below). This pop-up box gives you another chance to create a “Coupa Supplier Portal” (CSP) account. If you choose to not create an account, just click on the “X” at the top right corner of the pop-up box to close.

Click [here](#) for the step-by-step guide to create an account in CSP.



### STEP 4: Approval

Once the form is submitted, World Vision will receive a notification, and the approval process will begin.

You will be notified via email if your form is approved or more information is required.

### STEP 5: Whom to Contact regarding the status of your registration?

Contact your World Vision Buyer.