



ERGO Supplier Registration

Coupa Platform

First Steps

As an ERGO supplier, there are two ways to fill out your supplier self-assessment.

→ One is by creating a Coupa Supplier Account or

→ Or the other is to access the form directly on the website.

Creating the account in the Coupa Supplier Portal (CSP) is strongly recommended, as this allows you to adapt the information submitted at any time and not requires you to enter your information again in case of necessary changes. To do so, please select “Join and Respond” in our Email.

Best regards,
ERGO Technology & Services S.A.
Procurement Team
24, Droszyńskiego st.
80-381 Gdańsk, Poland



Join and Respond

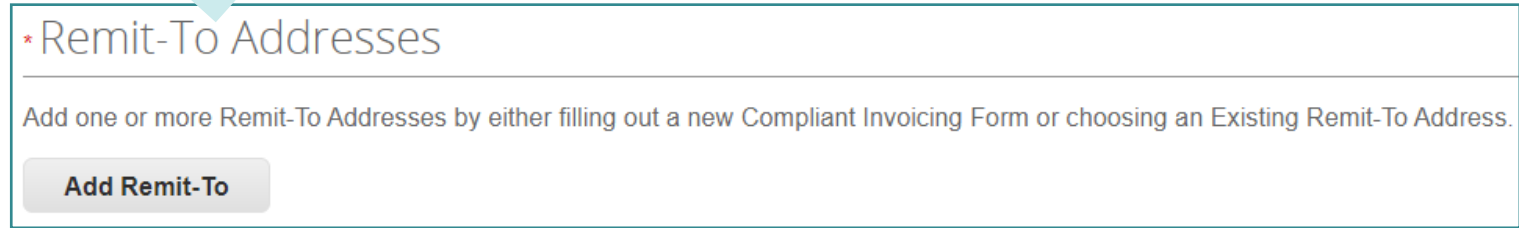
Respond Without Joining

	COUPA SUPPLIER PORTAL (Join and Respond)	WITHOUT AN ACCOUNT (Respond Without Joining)
Fully capture supplier information	✓	✓
Attach documents and certificates	✓	✓
Saving and editing again	✓	✗
Changing data already entered and submitted	✓	✗
Communicate within the form via "Comment" functionality	✓	Restricted

Add Banking Details

→ Every ERGO Supplier must provide at least one set of Banking details within Coupa. These banking details will later be used for invoices submitted by you. To do so, please click on “**Add Remit-To**”.

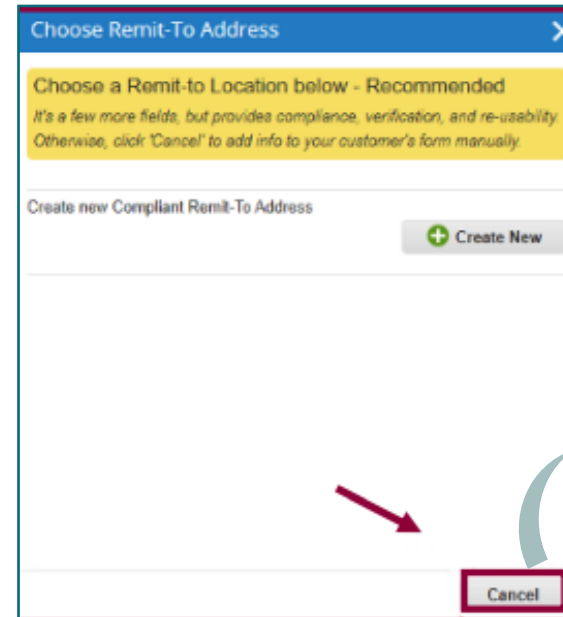
→ For Coupa Supplier Portal (CSP) suppliers, a pop-up window will then appear. Please close this window by clicking on "Cancel". Non-CSP suppliers can simply ignore this step.



* 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.

Create new Compliant Remit-To Address

+ Create New

Cancel

→ Please proceed by entering the banking information fields that are now available

Bank Information

→ Type of bank account

If you have a bank account within the Single Euro Payment Area (SEPA) or with an IBAN number, please click on "IBAN number". If you do NOT have a bank account with an IBAN number, for example, because your bank is located in the USA, please click on "Bank Account + Routing Number".

1

→ Bank Information

When entering the bank information, please ensure that all fields are filled out and spelled correctly. No spaces are allowed in the IBAN number, and the initial Country-identifier must be entered. When copying your IBAN from another document, it may happen that you copy spaces (e.g., at the end of the number). In this case, please remove the spaces.

2

→ Proof of ownership

In order to verify the correctness of the bank information provided, we require proof of ownership. This proof can be a bank confirmation, a blank invoice, a copy of the bank statement or any other document providing the banking information

3

* Remit-To Address

New Bank Account: Please keep in mind that only one single bank account per currency is to be added and that only one single bank account will be used for all payments to you!

* Bank Account Options IBAN Number Bank Account + Routing Number

Please provide either the IBAN Number (e.g. for EU / SEPA countries) OR the Bank Account + Routing Number (e.g. for the U.S.)

* Beneficiary Name

* Bank Name

* IBAN Number ⓘ

* SWIFT Code (BIC) ⓘ

* Bank Country

* Account Currency

* Proof of Ownership No file chosen

REQUIRED to validate any new Bank Account created within Coupa

1

2

3

Welcome to the ERGO Supplier Onboarding

Welcome to the ERGO Group AG supplier registration process. With 20 million customers, ERGO is one of the leading insurance groups in Germany. Outside Germany, ERGO is active in more than 30 countries, with a focus on private customer business. The focus of its international activities is on Europe and Asia. In Europe, ERGO is the market leader in health and legal expenses insurance; in its home market of Germany, ERGO is the leader in all insurance segments.

Please visit the ERGO Supplier Portal for further information, training materials and guidelines:
<https://www.ergo.com/en/Unternehmen/Geschaeftspartner>

1. Company Information

* Company Name

Including full legal form.

* Primary Address

Country/Region	<input type="text" value="Poland"/>
Address Name	<input type="text"/>
Street Address	<input type="text" value="Droszyńskiego"/>
Street Address 2	<input type="text" value="24"/>
City	<input type="text" value="Gdańsk"/>
State Region	<input type="text" value="pomorskie"/>
Postal Code	<input type="text" value="80-381"/>
Location Code	<input type="text"/>
PO Box	<input type="text"/>
PO Box Postal Code	<input type="text"/>

Website

Start onboarding

- Please ensure the **full legal name** of your company is entered
- Please provide **all relevant information** for a clear identification and communication with your company.
- Mandatory are:
 - **Street Address**
 - **Postal Code**
 - **City**
 - **Country**

Add your contact details

→ The **Primary Contact** will be our default contact in case of questions and communications with your company.

2. Contact

* Primary Contact

* **First Name**

* **Last Name**

* **Email Address** ⓘ

* **Primary Phone**

Country/RegionArea/City Local Extension (optional)

Including dial-through number

Mobile Phone

Country/RegionArea/City Local Extension (optional)

Central Company Number

Country/RegionArea/City Local Extension (optional)

→ Please provide us also with a **dedicated email address** for all purchase orders. If similar to the primary contact, please enter primary contact email details again. The accounting contact will be used for all accounting related transactions and questions.

* **Email for Purchase Orders** ⓘ
If you don't have a dedicated email account, please enter your own company email address

* **Add Accounting Contact** Yes No
Do you want to add an additional contact which will be used for all accounting related topics?


* **Accounting Contact Given Name**

* **Accounting Contact Family Name**

* **Accounting / Remittance Email-Adresse**

Company Details

3. Company details

DUNS Number 

* Do you have a VAT-Number? Yes No

* VAT ID

* Do You have a Tax Residency Certificate? Yes No
Please select "Yes" if you have a Tax Certificate

* Tax Residency Certificate Upload Tax residen...certificate.pdf
Please Upload Your Tax Residency Certificate

Company Registration Number
(Company Registration Number, e.g. CEIDG or Commercial Register or KRS)

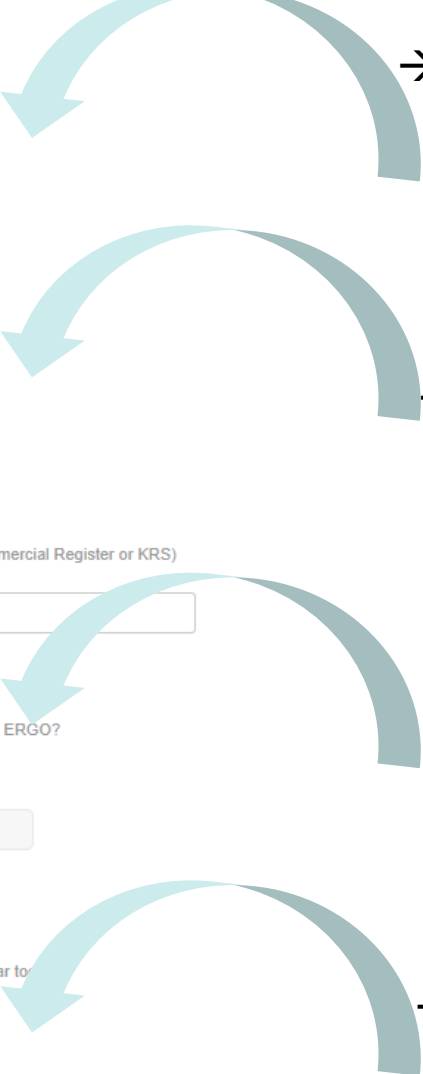
REGON Number

* IT Products / IT Services Yes No
Are you going to supply IT Products or IT Services to ERGO?

Competency Matrix

Please submit the filled Competency Matrix Competency matrix.pdf
Download the form above and edit it in excel or similar to

* Will the service be provided under B2B contract?
Business-To-Business, Sole Trader



→ Please provide either the **EU-VAT** or your local **tax ID**. Please insert the country code (two letters before the EU-VAT number). Country code can be checked here: https://ec.europa.eu/taxation_customs/vies/

→ Please provide the **tax residency certificate**, if available.

→ Please download and fill out the **competency matrix** if your company provides IT products or services.

→ If the service be provided under **B2B contract (sole trader)** please select ,yes' and upload relevant documents

Financial information

3.1 Key Corporate Figures

3.1.1 Turnover in EUR

* Year before last

In EUR. If your company did not exist at that time please enter 0.

* Last year

In EUR. If your company did not exist at that time please enter 0.

* Current year (projection)

In EUR

3.1.2 Financial Information

Please attach a current financial information

Financial Statement.pdf

If multiple files are required please use a ZIP file.

3.1.3 Number of Employees

* Year before last

If your company did not exist at that time please enter 0

* Last year

If your company did not exist at that time please enter 0

* Current year

Please provide your companies turnover in Euro. If your company did not exist and therefore not generate any turnover, please enter a "0".

Please attach a reliable financial statement.

Please provide the number of employees of your company. If your company did not exist and therefore not employ any employees, please enter a "0"

3.2 References Relevant to ERGO

3.2.1 Reference 1:

Company Name

Insurance Gmbh

Products / Services provided

Insurance services,
risk management,
additional details are...

Please provide context in regard to the products and/or services offered.

Volume

2,0000000

In EUR

Beginning of offering

12/01/21



Date of contract signature

End of offering

08/04/22



Date of last business transaction




Please provide references relevant to future business transactions with ERGO Group.

3.3 Primary Commodity Group

Please select which commodity group best reflects the products you are providing. ERGO will use this information to route this form to a relevant buyer.

* **Primary Commodity Group**

1.4.1 Software maintenance 



The Primary Commodity Group will be used as an initial allocation for internal routing of your onboarding form.

3.4 Banking Information

→ It is mandatory to provide at least one set of banking information. To do so, please click on **“Add Remit-To”**.



* CSP Account Yes
 No

Did you create an account with the Coupa Supplier Portal (CSP) to access this self-assessment (log-in WITH password)?

It is MANDATORY to provide at least one bank account information.

Please add your preferred bank account by pressing "Add Remit-To".

If you do so, a "Wizard" appears. We do not need all the information requested in the "Wizard", it is sufficient to select "Cancel" and continue with the reduced onboarding form.

*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

New Bank Account: Please keep in mind that only one single bank account per currency is to be added and that only one single bank account will be used for all payments to you!

* Bank Account IBAN Number
Options Bank Account + Routing Number

Please provide either the IBAN Number (e.g. for EU / SEPA countries) OR the Bank Account + Routing Number (e.g. for the U.S)

* Beneficiary Name

* Bank Name

* IBAN Number ⓘ

* SWIFT Code (BIC) ⓘ

* Bank Country/Region

* Account Currency

* Proof of Bank details Bank confirmation.pdf

REQUIRED to validate any new Bank Account created within Coupa

→ Please make sure that the "proof of ownership" of the bank details is uploaded as well.

→ This can be a bank confirmation, a blank invoice or a copy of the bank statement etc. or any other document




→ If you registered with a password, a pop-up window will appear. Please select to “close” this window and do not enter any information there. The bank data can afterwards be entered in a simplified form.

4. Quality Information & Compliance

4.1 Compliance

Required compliance and declaration documents



Please download this zip-File to download the package of required compliance and declaration documents

*** Declaration of confidentiality (NDA)**

NDA.pdf

Please upload the signed version of the Declaration of confidentiality (NDA)

*** Confirmation of Compliance with the Principles of the Global Compact**

Global compact.pdf

Please upload the signed version of the Global Compact

*** Anti-Corruption Agreement**

Anti-corruption.pdf

Please upload the signed version of the Anti-Corruption Agreement

*** Consent to electronic invoice processing**

Yes
 No

Do you accept to issue and share invoices in electronic form?

*** Declaration Upload**


Invoicing.pdf


Please upload the signed declaration form




Please upload the signed documents in the respective upload functions

ISO 9001

Effective Date 04/14/22 

Expiration Date 08/26/22 

Attachments Add [File](#)


 9001_certificate.pdf


Description

If your company is **ISO 9001** or **ISO 14001** certified, please upload your certificates including effective and expiration date. These certificates are mandatory if required for the business relation with ERGO


Please also upload any other certificate relevant for the business relationship with ERGO.

ISO 14001

Effective Date 06/13/22 

Expiration Date 07/20/22 


Attachments Add [File](#)


 14001_certificate.pdf

Description

Please upload additional certificates such as REACH, RoHS or other Quality Assurance systems you might be certified in. Indicate the name of the certification in the description box (such as "REACH").

Other Certificate 1:

Effective Date 10/01/19 

Expiration Date 10/01/22 


Attachments Add [File](#)


Details / Description EU REACH Compliance certificate

5. Other Information


* Does your company publish a sustainability report? Yes No

Please Include a copy

Effective Date 

Expiration Date 

Attachments [Add File](#)

 Sustainability_report_ERGO.pdf

Description



Please add the sustainability report of your company if available.

* Previous experience with a company of Munich Re Group? Yes No

Have you previously done any work for any company within the Munich Re Group?

* Entity

For which entity/entities

* Year

If you are already an active supplier of any other Munich RE group company, please provide further details here.

Here is room for any other remarks you wish to submit



We are currently an active Munich Re supplier. We are looking forward to a successful business relationship

Submit your response form

With CSP account

- You can save and return to your onboarding form at any time by clicking on “save”.
- By clicking on „Submit for Approval”, your form will be sent to ERGO for review and internal processing.
- After submitting, you will receive information about any change in status of your form (approved / rejected).

Decline

Save

Submit for Approval

Without CSP account

- You can not save and return later. The form shall be completed during one session.
- You will not be able to make any changes once the form is submitted for approval.
- By clicking on „Submit”, your form will be sent to ERGO for review and internal processing.
- After submitting, you will receive information about any change in status of your form (approved / rejected).

Decline

Submit

ERGO

Technology & Services

Thank you!

Should you need any help filling out the form, please do not hesitate to contact:

sm-etspl-supplier.coupa@ergo.com

