

Supplier Profile Information Request Guide

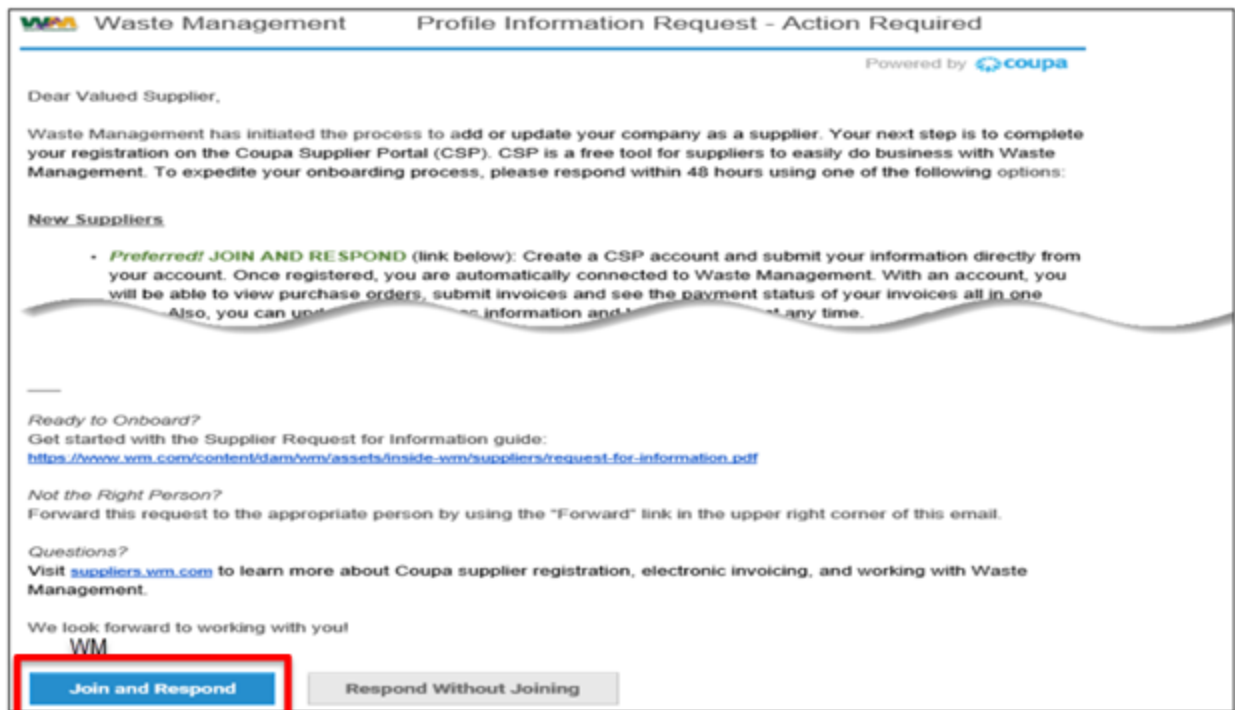
About this Guide:

This guide provides an overview of the process to complete the Profile Information Request from WM as initiated through the email received from Coupa. You will be able to add your company as a supplier, or review and update your supplier information. The Coupa Supplier Portal (CSP) is a free, online portal that allows Suppliers to transact electronically with WM. By joining Coupa, you will be able to submit your supplier profile updates, receive POs, submit invoices against POs, and see payment status – all in one place. Join today and enjoy the benefits of a **no-cost** CSP account!

Step 1 – Choose How to Respond

FIRST, you will receive an email invitation requesting information from the Coupa Supplier Portal (CSP) like the one displayed below.

SECOND, based on your response decision, click on the corresponding email link below the WM signature.



New Suppliers:

1. (**Preferred**) To join the Coupa Supplier Portal and create an account, click **Join and Respond**
2. To provide the required supplier information without registering on the CSP, click **Respond Without Joining**.

Existing Suppliers:

1. If you have a CSP account, click **Update Profile** to respond to the information request. Once you have logged in, update your form starting from **Step 6 – Company Information** in this guide.

Supplier Profile Information Request Guide

Step 2 – Create Your Coupa Account

Coupa asks you to provide some basic information about your company for your public profile.

After selecting **Join and Respond**, a new window will open for you to create your CSP account.

1. The **Email** field will be the email address which received the Request for information and cannot be changed.
2. Create your password and confirm by entering the same password again.
3. Check the box to accept the Privacy Policy and Terms of Use.
4. Click **Create an Account**.

NOTE: If the invitation should be forwarded to another contact, then select the **Forward this to someone** option and follow those instructions

Create an Account

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

* Business Name
Emerald City Test Lc
Your legal business name (or legal personal name if an individual)

* Email
linda.caban@gmail.com

* First Name
Grace

* Last Name
Emerald

* Password
Use at least 8 characters and include a number and a letter.

* Confirm Password

accept the [Privacy Policy](#) and the [Terms of Use](#)

Create an Account

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

Step 3 – Provide Information for Your Profile

After creating your account, the “Tell us about your business screen” will appear. Complete the profile information. This information should be updated to your company’s address where orders should be sent.

NOTE: This address should be a business location or physical address.

IMPORTANT: If your Remit-To address is different from your ordering address, uncheck the **Pay to location (Remit-To)** box to open and complete the Remit-To address fields.

Click **Next**.

Waste Management Powered By **coupa**

Basics Profile

Tell us about your business

* Company Name
Emerald City Test Lc
Your official registered company name

Website

* Country/Region
United States

* Address Line 1
15 Mariani Street

Address Line 2

* City
Hempstead

State
NY

* Postal Code
11590

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

Pay to location (Remit-To)

* Address Line 1

Address Line 2

* City

State
Example: CA

* Postal Code

Ship from location

Advanced Invoicing We support integration for Invoicing (XML or SFTP) and plan to use it with Waste Management

Preferred Invoicing Language
English (US)

Tax Country/Region
United States

Tax ID

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

I don't have Tax ID Number

[Add additional tax id](#)

Next

Supplier Profile Information Request Guide

Step 4 – Discounts (skip this section)

Skip this section and click **Next**.

NOTE: WM does not use payment discounts offered through Coupa. For payment discounts, contact your local WM representative.

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Basics Payment Profile

Would you like to offer discounts to get paid faster? **0**

Payment Discount Preferences

Your default payment term	Automatically replace with this discount (you can change this later)
Net 30	None
Net 45	None
Net 60	None
Net 75	None
Net 90	None
Net 120	None

Back **Next**

Step 5 – Open Supplier Information Form

After you provide the basic information, click, **Take Me There**, to go to WM's supplier form.

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Basics Payment Profile

You are one step away from doing business with Waste Management

Waste Management requires some additional information

Take Me There

Supplier Profile Information Request Guide

Step 6 - Company Information

Complete or update the following fields, carefully following the form instructions:

- **Company Name (DBA)**
- **Legal Entity Name**

IMPORTANT: Ensure supporting documentation files are uploaded where required. Coupa will not allow incomplete forms to be submitted for approval.

The screenshot shows the 'Waste Management' profile page in the Coupa Supplier Portal. The 'Company Information' section is visible, with a red box highlighting the 'Company Name (DBA)' field. The page also includes a 'Primary Contact' section with fields for Name, Email address, and Work Phone.

Step 7 - Ordering Address (Primary Address)

Complete or update the **Ordering Address** information to reflect the primary company address.

The following fields should be left blank – do not populate:

- **Address Name**
- **Location Code**

The screenshot shows the 'Ordering Address Information' form. A red box highlights a warning message at the top: "IMPORTANT! Do not fill out the fields 'Address Name', 'Location Code', 'PO Box' and 'PO Box Postal Code' as these are not valid fields." Below this, there are two sections for 'Primary Address'. The top section has red boxes around the 'Address Name' and 'Location Code' fields, both containing the text 'DO NOT USE'. The bottom section is identical but has a red box around the 'Location Code' field, which also contains 'DO NOT USE'.

Supplier Profile Information Request Guide

Step 8 - Remittance Currency & Payment Method

This section contains information about receiving payments from WM. It is important to follow all instructions on the form carefully to prevent payment delays.

Payment Currency (select one)

- USD
- CAD
- None (blank) indicates that both CAD and USD are accepted

NOTE: Payment Currency should be specified if requesting ACH / EFT payments.

Remittance Currency & Payment Method

Payment Currency

Leave blank if both USD and CAD are accepted

* Requested Payment Method

Please select the correct payment method. Please note ACH/EFT is Waste Management's preferred method

Requested Payment Method (select one)

- ACH (WM preferred method)
- Virtual Card by Email
- Credit Card by Phone
- Paper Check

Step 9 - Remittance Form Instructions & Current Remit-To Information

Remittance Address & ACH Information

Instructions are displayed at the top. Carefully follow all instructions.

Existing Suppliers:

Current Remit-To information is displayed below the instructions. This information cannot be edited. Continue to **Step 10** to make changes to your Remit-To address or ACH information.

New Suppliers:

You **will not see** this display section. Go to **Step 10**.

Requested Payment Method & Payment Currency

* Requested Payment Method

Please select the correct payment method. Please note ACH/EFT or Virtual Credit Card are Waste Management's preferred methods

Payment Currency

Leave blank if both USD and CAD are accepted

Existing Remittance and/or ACH/EFT Information

IMPORTANT - Please Read

FOR EXISTING SUPPLIERS - Your existing Remit To address will be displayed below and cannot be edited.

- If there are CHANGES to your Remit To address OR you need to change or add ACH information, please note that the existing Remit To information cannot be edited. You will need to INACTIVATE the existing Remit To information and then click the "ADD REMIT TO" button to ADD a new remit to section and/or ACH information.
- For any changes related to your Remit To information, Waste Management will contact you to VERIFY the changes.
- If NO changes are required, please skip this section.

Remit-To Address

If you are an existing supplier, below is your current Remit To information. This information CANNOT BE EDITED. Please inactivate the current Remit To section and click the "ADD REMIT TO" button to CHANGE your Remit To information.

Street Address

Street Address 2

City

State Region

Postal Code

Country/Region

Supplier Profile Information Request Guide

Step 10 - Remit-To Address

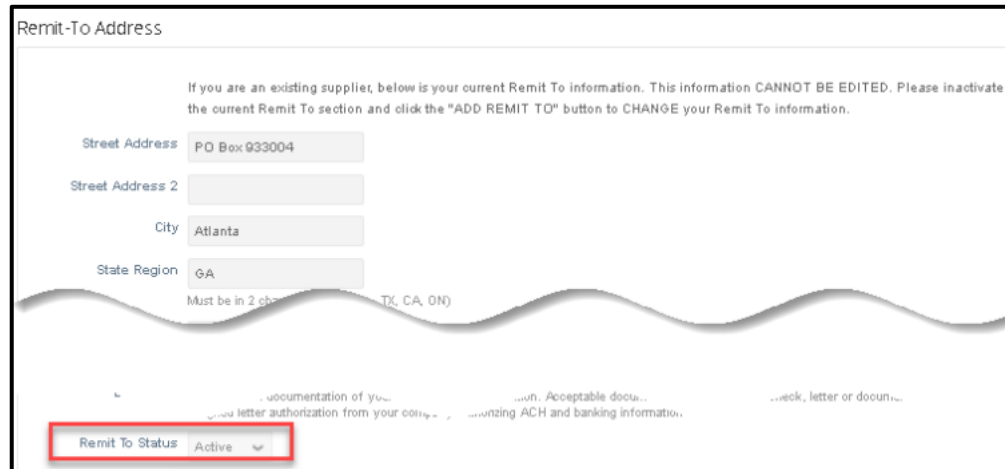
For New Suppliers:

Complete Step 10 beginning with the **REMIT-TO ADDRESS** instructions below:

For Existing Suppliers:

If no changes are required to your Remit-To address or ACH information, go to **Step 13**.

If changes are required to the current Remit-To address or ACH information, you must first deactivate the existing Remit-To information prior to submitting new information. To deactivate an existing Remit-To address:



Remit-To Address

If you are an existing supplier, below is your current Remit To information. This information CANNOT BE EDITED. Please inactivate the current Remit To section and click the "ADD REMIT TO" button to CHANGE your Remit To information.

Street Address: PO Box 933004

Street Address 2:

City: Atlanta

State Region: GA

Must be in 2 characters (TX, CA, ON)

Remit To Status: Active

1. Scroll to the end of the Remit-To Addresses form
2. Under the Remit-To Status, select **Inactive**
3. You can now complete changes as follows:

To add a new Remit-To address,
continue **Step 10**.

To change your current ACH information,
go to **Step 12**.

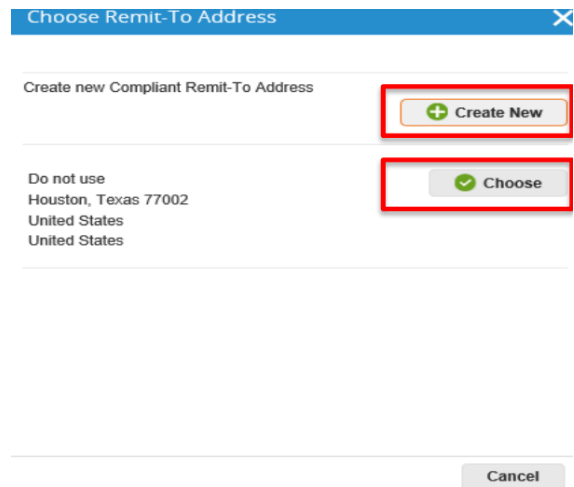
REMIT-TO ADDRESSES

Your Remit-To Address and ACH / EFT information are in the **Remit-To** section. If ACH / EFT is selected as the payment method, click the **Add Remit-To** button to add a Remit-To section for the remitting address and / or banking details.

After clicking **Add Remit-To**, a new Choose Remit-To Address box will open. To select an available Remit-To address created previously as part of your initial Coupa Supplier Portal setup, click Choose. You can then skip to **Step 12**.

To create a new Remit-To address, click **Create New** and continue to **Step 11**.

NOTE: To see this "Choose Remit-To Address" box, you may need to scroll down.



Choose Remit-To Address

Create new Compliant Remit-To Address

+ Create New

Do not use
Houston, Texas 77002
United States
United States

Choose

Cancel

Supplier Profile Information Request Guide

Step 11 – Create New Remit-To Address

In Coupa, a new Remit-To address must initially be associated with a legal entity.

Provide your Legal Entity Name.

Select the Country/Region for your Remit-To address.

Click **Continue**.

Select the customers that should see the Remit-To address.

To avoid having to manually type information from your Coupa profile, ensure you select the **Waste Management** checkbox.

Provide your company's address details under What address do you invoice from? Provide your Legal Entity **Country/Region** and **Tax ID**.

Skip the **Miscellaneous** fields.

Click **Save & Continue**.

Where's your business located?

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

* Legal Entity Name

Country/Region

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

Cancel **Continue**

Tell your customers about your organization

Which customers do you want to see this?

All

Waste Management

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region

REQUIRED FOR INVOICING

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

Use this address for Remit-To

Use this for Ship From address

What is your Tax ID?

Country/Region

Tax ID

I don't have Tax ID Number

Add additional Tax ID

Miscellaneous

Invoice From Code

Preferred Language

Cancel **Save & Continue**

Supplier Profile Information Request Guide

Step 11 – Create New Remit-To Address (Cont'd)

Select **Address** for Payment Type.

NOTE: In this Remit-To section, the only Payment Type accepted by Waste Management is Address.

Click **Save & Continue**.

Confirm the address information is correct and click **Next**.

The screenshot shows a dialog box titled "Where do you want to receive payment?". It features a progress indicator with four steps, where the third step is highlighted. Below the progress bar, there is a text prompt: "Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next." and an "Add Remit-To" button. A table below lists the current Remit-To location:

Remit-To Account	Remit-To Address	Status	
Address	123 Maple Drive Houston TX 77002 United States	Active	Manage

At the bottom of the dialog, there are three buttons: "Deactivate Legal Entity" (red), "Cancel" (grey), and "Next" (blue, highlighted with a red box).

OPTIONAL If goods are shipped from a different location, a Ship From address can be added to the legal entity by clicking **Add Ship From**.

Click **Done**.

The screenshot shows a dialog box titled "Where do you ship goods from?". It features a progress indicator with four steps, where the fourth step is highlighted. Below the progress bar, there is a text prompt: "For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered." and an "Add Ship From" button. A table below lists the current Ship From location:

Title	Status	
123 Maple Drive Houston TX 77002 United States	Active	Manage

At the bottom of the dialog, there are three buttons: "Deactivate Legal Entity" (red), "Done" (blue, highlighted with a red box), and a partially visible "Cancel" button.

Click **Add Now** to add the Remit-To address to the form. The Remit-To address is now added to the form. Click **Done**.

The screenshot shows a dialog box titled "Setup Complete". It features a progress indicator with four steps, where the fourth step is highlighted. A large green checkmark is displayed in the center. Below the checkmark, the text reads: "Congratulations! This legal entity can now be used on new invoices." Below this, there is a yellow callout box with the following text:

To get paid - Most customers require that you send them this payment info in in addition to providing it on the invoice.

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

At the bottom of the dialog, there are four buttons: "Go to Orders" (grey), "Go to Invoices" (grey), "Return to Admin" (grey), and "Done" (blue, highlighted with a red box).

Supplier Profile Information Request Guide

Step 12 – Provide ACH / EFT Information

If ACH / EFT was NOT selected as the payment method previously, select No to the question if ACH / EFT was selected as the payment method. IF ACH / EFT was selected as the payment method, select Yes to open the banking information fields. Follow the form instructions to provide your banking details in the appropriate fields.

NOTE: Documentation of your banking details is required. This documentation should be a voided check, bank letter, or document on company letterhead as noted on the form instructions.

ACH / EFT Information

As part of WM's commitment to the environment, paper check remittances are discouraged. As paperless alternatives, WM offers ACH/EFT and virtual card payment options. Please indicate below if your company can accept ACH/EFT payments and provide your ACH/EFT remittance information below. If you prefer virtual card, select No and skip to the Virtual Card Information section.

Was ACH/EFT selected as the payment method above? Yes No

Bank Details

Bank Name

Account Type
Only indicate "Checking" or "Savings"

Account Currency

Bank Account Number

Bank Routing Number

9 digit bank routing number is required for US suppliers. Should not be used by Canadian supplier. Please use the Canadian Branch and Bank ID fields below for your bank routing number.

Canadian Bank ID
A 4 digit bank ID is required for Canadian suppliers. NOTE: If a 3 digit Canadian Bank ID is provided, a leading zero will be added as it is required for EFT payments.

Canadian Branch ID
9 digit branch ID is required for Canadian suppliers.

Bank Country/Region

Bank Account Document
Please attach documentation of your bank account information. Acceptable documents include a voided check, letter or document from your bank, or a signed letter authorization from your company authorizing ACH and banking information.

Active

Please select inactive if the remit to information is no longer valid.

Step 13 - Legal Entity Information

Select your Legal Entity type and complete the appropriate fields, including any required support documentation.

Legal Entity Information

* Legal Entity Name
Name that is used on your Federal Tax Return. For a Sole Proprietor business, the name of the owner is required.

* Organization Type

* Legal Entity Country US Company Canadian Company Other

Supplier Profile Information Request Guide

Step 14 – Certificate of Insurance

Provide the **Expiration Date** for the insurance.

Attach your current **Certificate of Insurance**.

Step 15 – Supplier Sustainability Program

Waste Management supports Supplier's efforts to **cut waste, use recycled materials, and maximize the use of their resources** to help us meet our sustainability goals.

If you have an **established sustainability program**, please let us know in this section.

Step 16 – Diversity Certification

*WM may use that information to contact you for ways to support your program. WM is committed to **supporting diverse Suppliers**. We accept the following certifications:

- Small Business Enterprise
- Veteran-Owned
- LGBT
- Women Business Enterprise
- Minority Business Enterprise

If any of these apply, please provide your certification details, and attach your certification document for verification.

Supplier Profile Information Request Guide

Step 17 – Certification of Accuracy and Contact Information

The Primary Contact information will be used for future information requests as well as requests to connect on the Coupa Supplier Portal.

Completing the information in this section serves as your signature certifying that all of the provided information in this form is **complete, true, and accurate**.



Step 18 – Completing the Form

Carefully **follow** form instructions.

IMPORTANT NOTES:

1) Supporting Documents

Required file attachments must be uploaded in order to submit for approval.

When you are ready to upload your file(s):

1. Log in to your Coupa account
2. Go to Profile from the top navigation ribbon
3. Go to Your Customer Profiles; the Waste Management form will display
4. Complete any missing information and attach any missing file(s) on the form
5. Submit the form for approval following Step 17

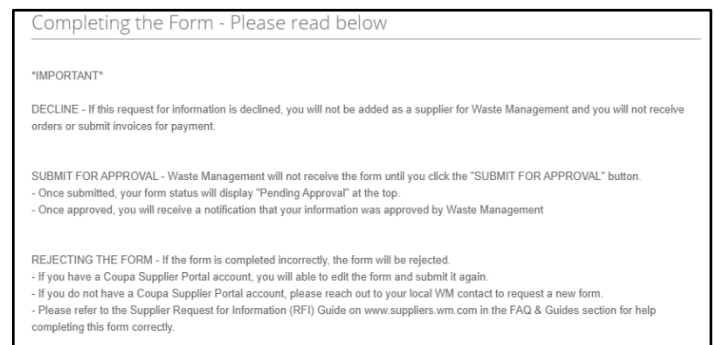
2) Correcting Errors

After submitting for approval, scroll to the top of the form to ensure there are no errors that require correction.

If you have errors in your form, you will be prompted to fix your errors at the top of the form.

Go through the form carefully and correct any errors highlighted in red font.

When done, submit the form for approval following **Step 18**.



Supplier Profile Information Request Guide

Step 19 – Submitting the Form

Skip the **WM USE ONLY** section – it is for Waste Management use only.

Click Submit for Approval to submit the form to Waste Management for processing.

For New Suppliers:

Selecting Decline will prevent your company from being a completed supplier for Waste Management.

For Existing Suppliers:

Selecting Decline will cause your information to not be updated, resulting in payment delays.

All Suppliers: Waste Management will reject any incomplete forms or forms completed incorrectly, requiring you to complete the Request For Information process again.

WM USE ONLY - Please do not complete any of the information below

Type of Goods or Services Professional Services-Underwriter Fees

WM Requester Email Icaban1@wm.com

WM Area K00033 / KL0033 - Information Technology

PO Method Prompt

PO Change Method Prompt

Compass No

Content Group

Supplier ID None

Coupa Supplier ID None

ERP None

SF2O No

Decline Save Submit for Approval

Next Steps

What you can do next:

- Visit our Supplier page at www.suppliers.wm.com to view our:
 - Supplier Code of Conduct
 - Terms and Conditions
 - Additional Coupa guidance related to ordering and invoicing
- After you receive notification of Waste Management approval of your information, you can begin submitting invoices

What we will do next:

- The information you provided will be **routed for proper approvals**
- Once approved, we will **update the information** in our system
- You will be notified when this update has been completed

NOTE: This process may take up to two weeks.