

### **Indirect Procurement Management**

#### Ivalua

#### **Purpose of Document**

- To provide a step-by-step guide of how to respond to the Request For Information related to your supplier record in Ivalua
- This training document contains screenshots from the Ivalua Tool

#### Intended Audience

This job aid is intended for Suppliers

#### Accessing the System

A Supplier must be invited by a Celestica Indirect Procurement team member to access Ivalua and a link will be provided at that time.

The mandatory fields to fill in are:

- Supplier English Name
- Supplier Address
- Supplier (Group or Head Office)
  - The Supplier will receive an email notification to advise of the login and user name with a temporary password.
  - The General Terms of use must be completed.

#### **Getting Help**

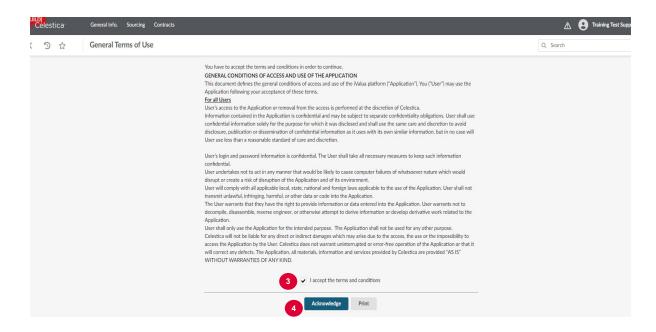
 Please email <u>indirect-documentation-cls@celestica.com</u> if you have other questions or need help using Ivalua.

# **Table Of Contents**

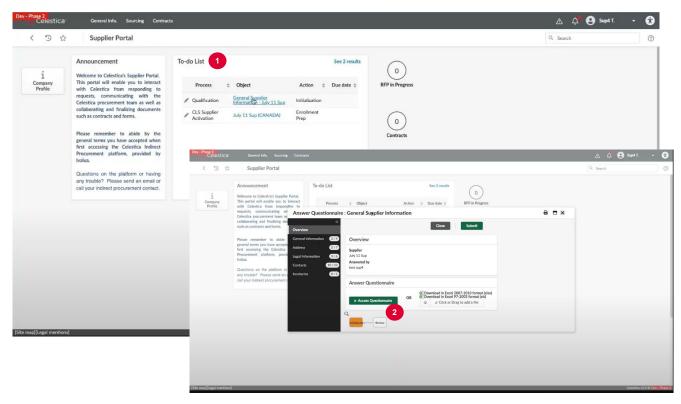


Supplier Onboarding Setup

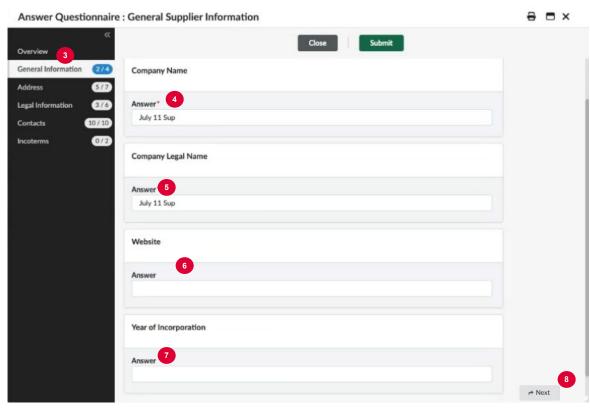
#### 1.Supplier Ivalua Login



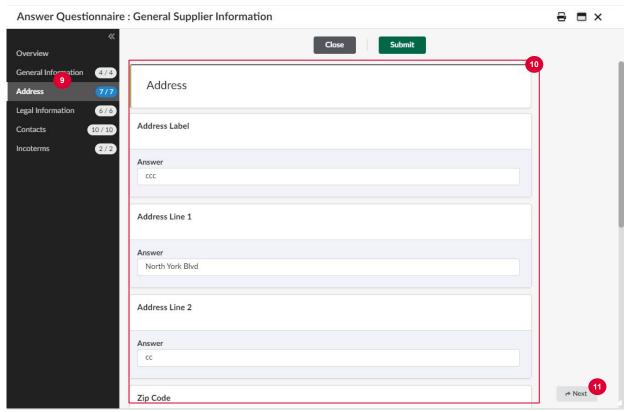
- The supplier contact will have received an invitation email to log into Ivalua. The email will have been initiated by the Celestica Category Management Team
- The Supplier Contact, logs into Ivalua using a link provided in the invitation email
- Selects the checkbox beside 'I accept the terms and conditions'
- 4. Select 'Acknowledge'



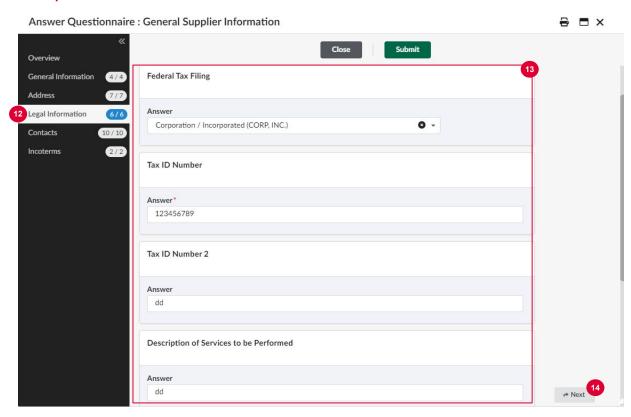
- From the Supplier Portal landing page, under the 'To-do List- Object column', select 'General Supplier Information
- 2. Select 'Access Questionnaire'



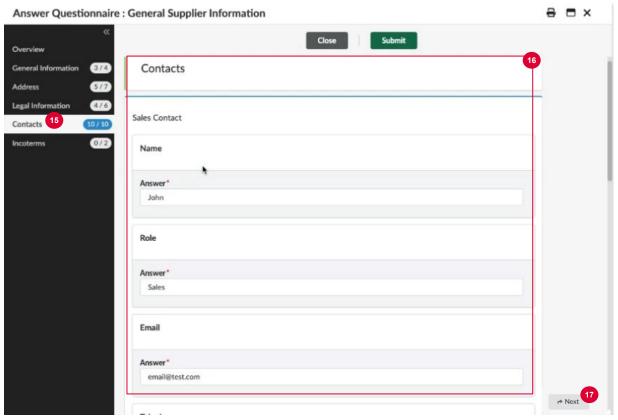
- 3. Click on supplier "General Information"
- 4. Populate the company Name
- 5. Populate the company Legal Name
- 6. Populate an website URL in the 'Website' field
- 7. Populate the year of incorporation
- 8. Click on "Next" after completing and filing in the answers



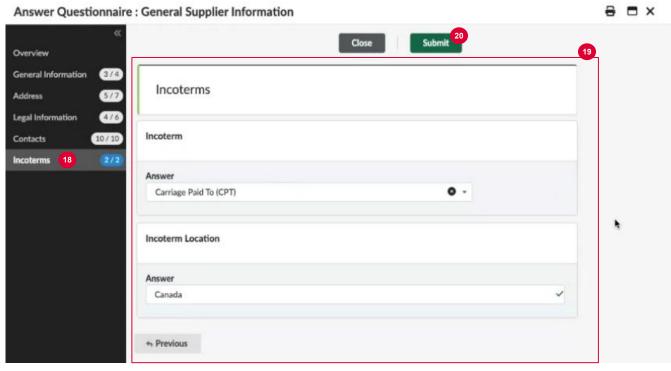
- 9. Click on supplier "address"
- 10. Answer the seven questions related to "Adress informations":
  - a. Populate the company Address
    Line 1
  - Populate the company AddressLine 2
  - Populate the company ZIP Code
  - d. Populate the company city
  - e. Populate the state/ Province
  - f. Select the country
- 11. Click on "Next" after completing and filing in the answers



- 12. Click on supplier "Legal Information"
- 13. Answer the six questions related to "Legal information":
  - a. Populate the Federal Tax Filing
  - Populate the Tax ID Number
  - c. Populate the Tax ID Number 2
  - d. Describe the services to be performed
  - e. Select the Vendor Operations
    Location
  - f. Populate the Federal TIN Category
- 14. Click on "Next" after completing and filing in the answers

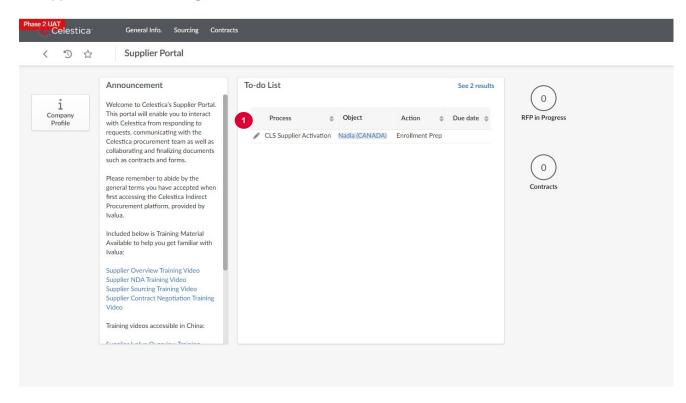


- 15. Click on supplier "Contact"
- 16. Answer the ten questions related to "Contacts":
  - a. Populate the sales contact
  - b. Populate the role
  - c. Populate email
  - Populate the phone number
  - e. Populate the Fax
  - f. Populate the Remittance contact
  - g. Populate the Remittance role
  - h. Populate the Remittance email
  - i. Populate the Remittance phone number
  - j. Populate the Remittance Fax
- 17. Click on "Next" after completing and filing in the answers



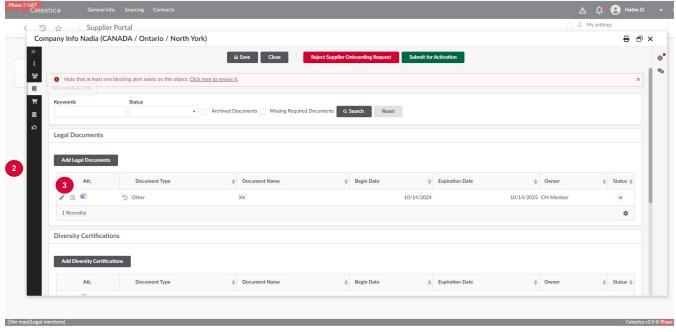
- 18. Click on supplier "Incoterms"
- 19. Answer the two questions related to "Incoterms":
  - a. Select incoterm type
  - b. Populate incoterm location
- 20. Click on "Submit" after completing and filing in the answers

#### 3. Supplier Document Management



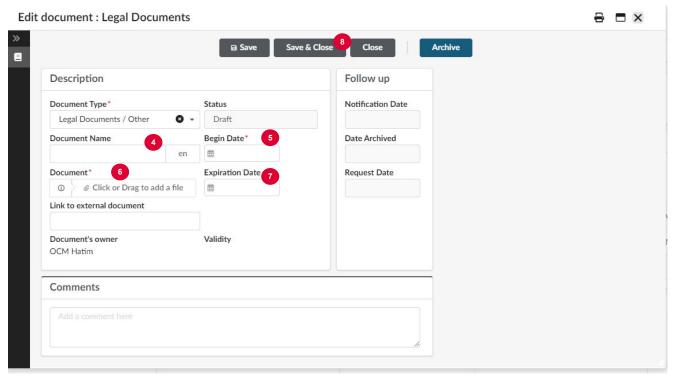
1. From 'To-do List' select 'supplier name' under the object column

3. Supplier Document Management - Legal documents (1/2)



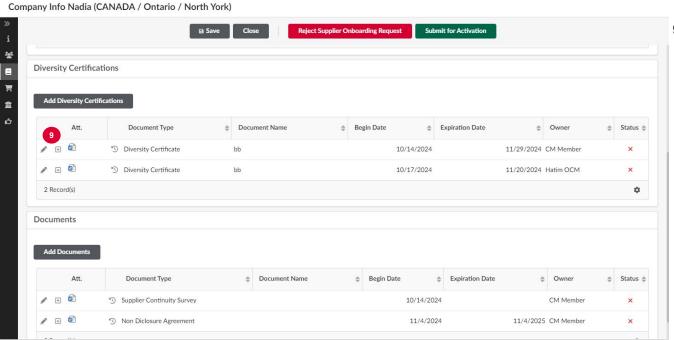
- 2. Select the 'Documents' tab
- Select the '+' icon beside the required document

3. Supplier Document Management - Legal documents (2/2)



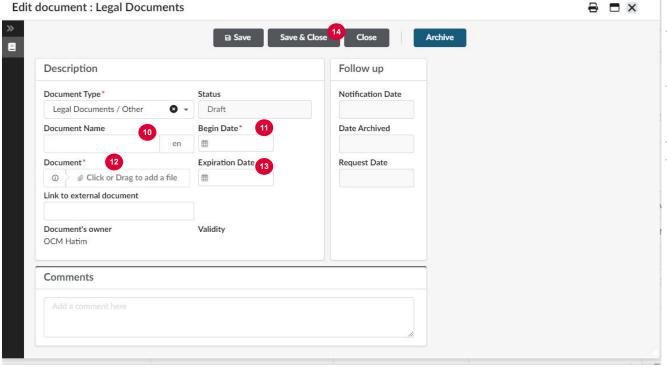
- 4. Enter a name in the 'Document Name' field
- 5. Select the begin date
- Select the 'Click or drag to add a file' and select a file from your local computer
- 7. Select the expiration date
- 8. Select 'Save & Close'

3. Supplier Document Management - Diversity Certifications (1/2)



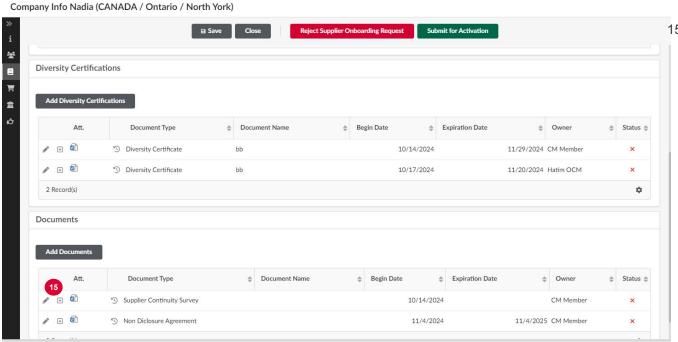
9. Select the '+' icon beside the required document

3. Supplier Document Management - Diversity Certifications (2/2)



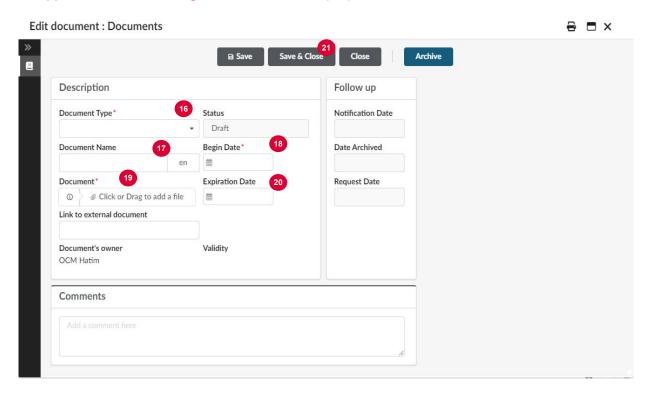
- 10. Enter a name in the 'Document Name' field
- 11. Select the begin date
- Select the 'Click or drag to add a file' and select a file from your local computer
- 13. Select the expiration date
- 14. Select 'Save & Close'

3. Supplier Document Management - Documents(1/2)



15. Select the '+' icon beside the required document

3. Supplier Document Management - Documents (2/2)

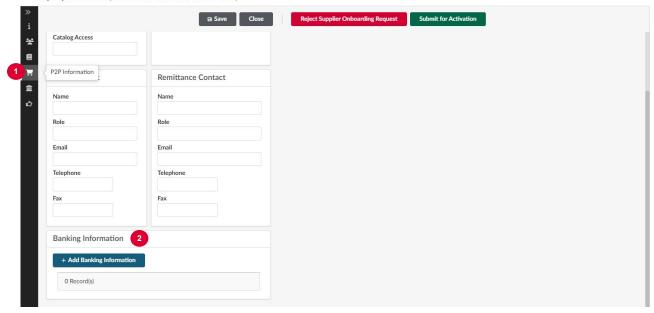


- 16. Select the document type
- 17. Enter a name in the 'Document Name' field
- 18. Select the begin date
- Select the 'Click or drag to add a file' and select a file from your local computer
- 20. Select the expiration date
- 21. Select 'Save & Close'

# **Supplier Banking Information**

4. P2P information - Add Banking Information (1/2)

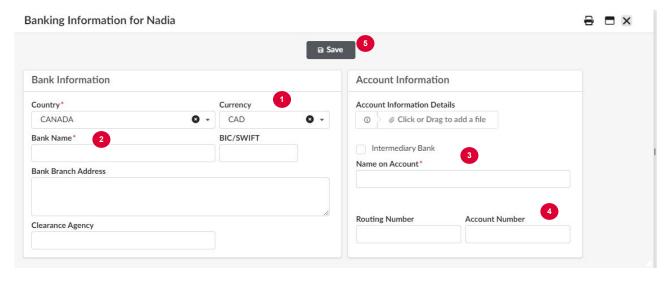
Company Info Nadia (CANADA / Ontario / North York)



- 1. Select the 'P2P Information' tab
- 2. Select '+Add Banking Information'

# **Supplier Banking Information**

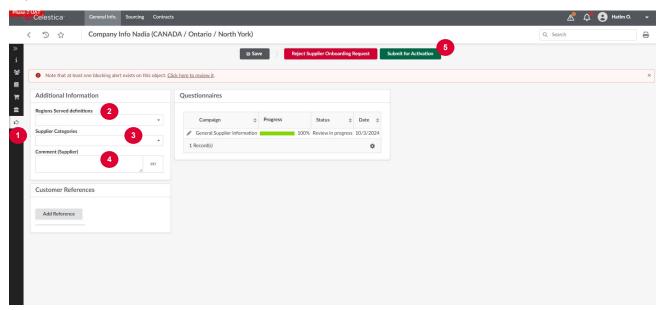
4. P2P information - Add Banking Information (2/2)



- 1. Select the currency field and select the currency corresponding to the assigned currency for this scenario
- 2. Enter a name in the 'Bank Name' field
- 3. Enter a name in the 'Name on Account' field
- 4. Enter a valid 'Account Number' in the field
- 5. Enter a valid 'Transit number' in the field
- 6. Select 'Save'

# **Supplier Banking Information**

#### 5. Qualifications



- 1. Select the 'Qualifications' tab
- Add some countries to 'Regions Served definitions'
- 3. Add some categories to 'Supplier categories'
- 4. Enter a comment in the 'Comment (Supplier)' field
- 5. Select 'Submit for Activation'

# Thank You

