Supplier Information Management

With Texas Instruments

Content

Course Objectives

After completing this course, you should be able to:

- Register and access the application
- Navigate and find your company information within the Ivalua application
- Create and maintain contacts for your company
- Maintain your company's information by performing various change request

Source to Pay Portal for Texas Instruments

Texas Instruments Source to Pay Transformation

- TI is making major improvements in our global Source to Pay processes. This project will be deployed in 3 phases.
- As a key feature of the Supplier Information Management module, supplier engagements will transition from current email and phone call based processes to the maintenance of information within a secure, web based portal.
- Some of the advanced features of this initial deployment include:
  - Automated onboarding, registration and self-maintenance capabilities, such as the ability for multiple supplier contacts, management of banking information, etc.
  - A secure repository for uploading and managing documents

Future Deployments

- Future phases will include:
  - Improved PO issuance & acknowledgement functions
  - Advanced invoicing features for our suppliers (PO to invoice flip) and a centralized invoice hub
  - Broader deployment of eCatalogs for faster, more automated TI/supplier engagements
  - Enhanced MRP collaboration features to improve communications for demand driven material requirements
- To learn more about the Ivalua platform, go to the Ivalua web site by clicking this link, and search for *“Source to Pay”.*

Ivalua Homepage Link

Benefits of Supplier Portal for Supplier

- Seamless collaboration with TI using platform
- One application for all communications with TI
- Supplier self-management of critical information
  - Company Information
    - Name & Address
    - Tax ID information
    - Banking information
  - Account representation
    - Sales
    - Quality
    - Accounts Payable

Supplier Information Management in Ivalua

Onboarding Process

Create Supplier Request

- Internal TI requester initiates new setup request entering supplier details into Ivalua portal.

Approve or Reject Supplier Request

- Request routes to CPT or Local Site Procurement for approval or rejection.

Supplier Inputs

- Supplier receives invite from portal to create a login.
- Supplier will submit additional information and required documents.

3rd Party Checks

- Supplier information goes through 3rd party validations:
- D&B
  - Name
  - Tax ID
- nsKnox
  - Banking

Exception Review

- Request stop for various exception reviews:
- Name mismatch
- Tax ID mismatch
- Non Std Pay Terms
- Non Std Inco Terms
- nsKnox exception
- Bank Beneficiary Name

Document & Tax Review

- Requires a review of documents and tax information provided by the supplier.

Final SIMT Approval

- SIMT performs final review and inputs remaining necessary information.

SAP Interface

- After the final approval SAP interface will be triggered to create the supplier account in SAP.

Supplier Setup is Complete

- SAP supplier number assigned to the Supplier account in Ivalua.
- Supplier record in Ivalua moved to an Active Supplier status.

Supplier Information Management (SIM)

- Information Change Process

Request Information Change

- Initiation of the change process.
- Change make to company profile.
- Change log is updated.

Submit Required Documents

- **Examples:** New business registration questionnaire, tax documents, minority business questionnaire, etc.

Submit Change Request to TI

- Details of request sent to TI.
- A new ID is created. This will be removed once request is complete.

TI to Approve or Reject

- Notifications will be sent to provide status of either response from TI
- Notification for rejections will contains detailed notes.

Change Request Complete

- New ID number is removed.
- Changes are applied to company profile.

Supplier Information Management (SIM), cont.

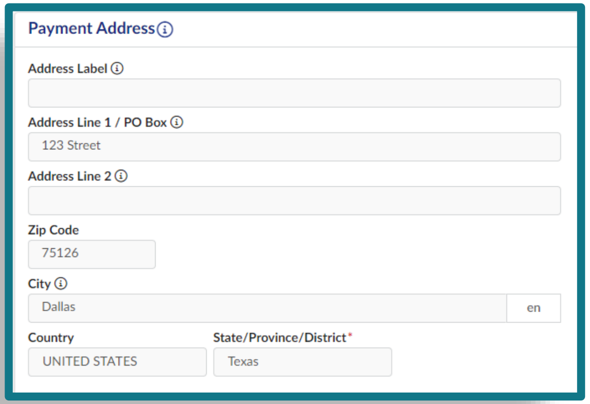
The Source to Pay portal enables suppliers to maintain critical information for their company.

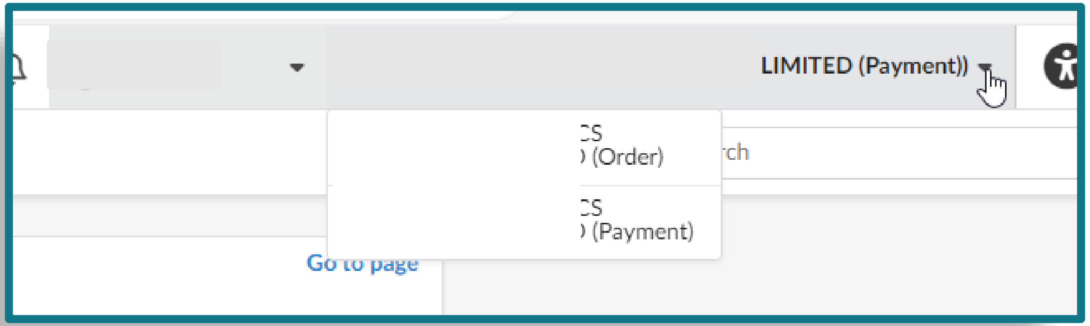
Types of Accounts

A different ID number will be assigned to each account type that is needed for your engagement with TI.

- Order Accounts – determines who TI will place an order with
- Payment Accounts – determines where TI will make payments

You can determine the type of account by reviewing the title for the address section and by clicking your company's name in the top right corner of the screen.





You will only see multiple account if your contact information is listed on each account.

Supplier Information Management (SIM), cont.

The Source to Pay portal enables suppliers to maintain critical information for their company.

Types of Updates

- Company Name
- Banking Data
- Tax ID
- Address
- Phone Number
- Contacts
- Certifications

A new ID number will be created for each change request. This number will be removed once the change request is approved by TI.

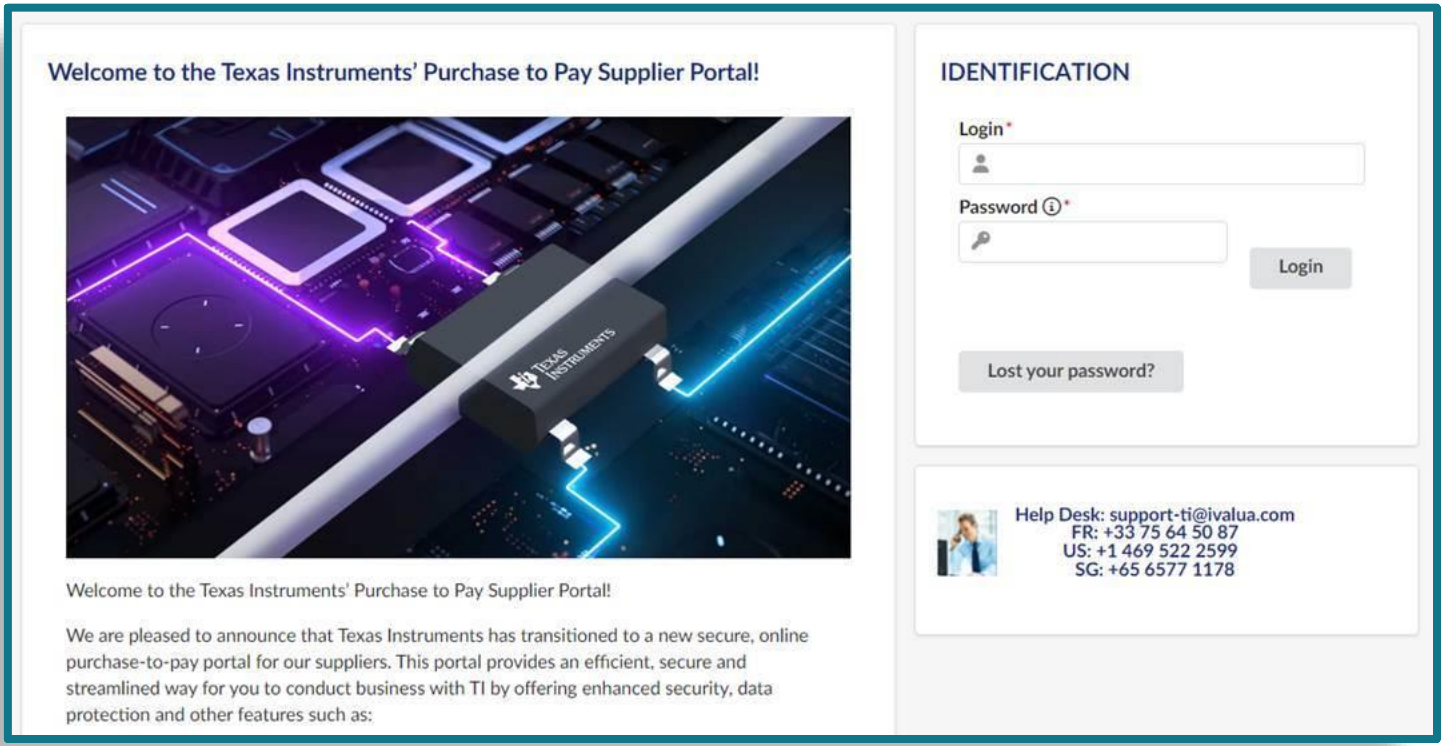
Accessing the Portal

Link to Application

Supplier Registration

- In order to access the system, you must complete the registration process
- You will receive an email with details that will direct you to create a password using the user id/email that was provided to TI

- After accessing the application link, enter your email and select “Lost your password?”



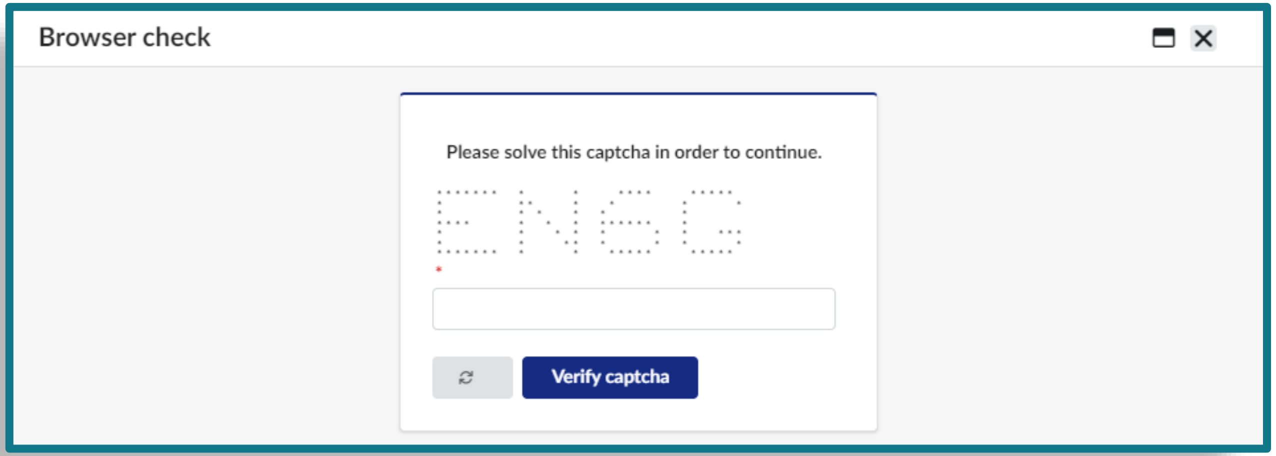
Supplier Registration, cont.

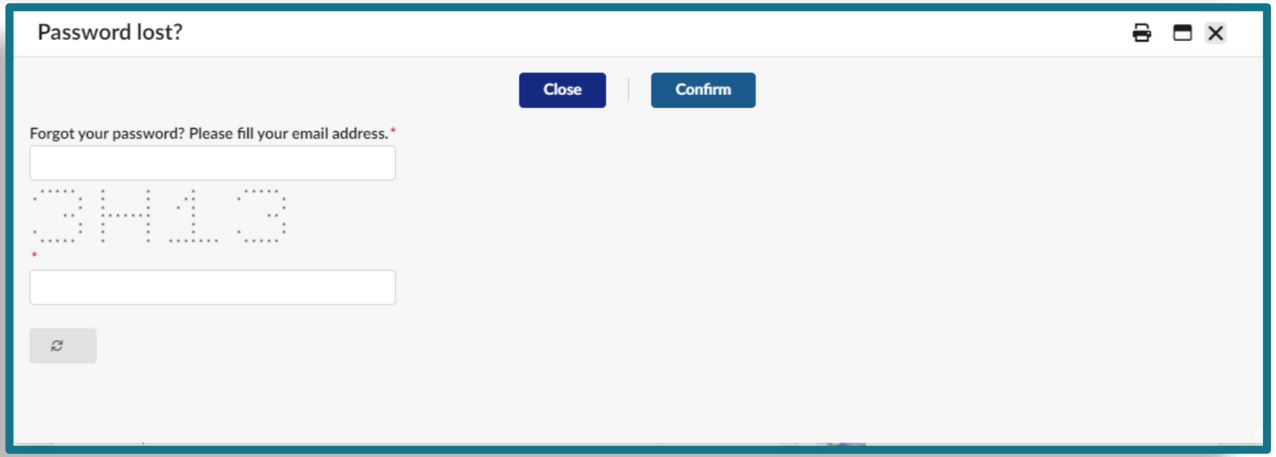
- Complete the browser check on the next screen

- Enter your email address and enter a password for your account

Your password must meet the following requirements:

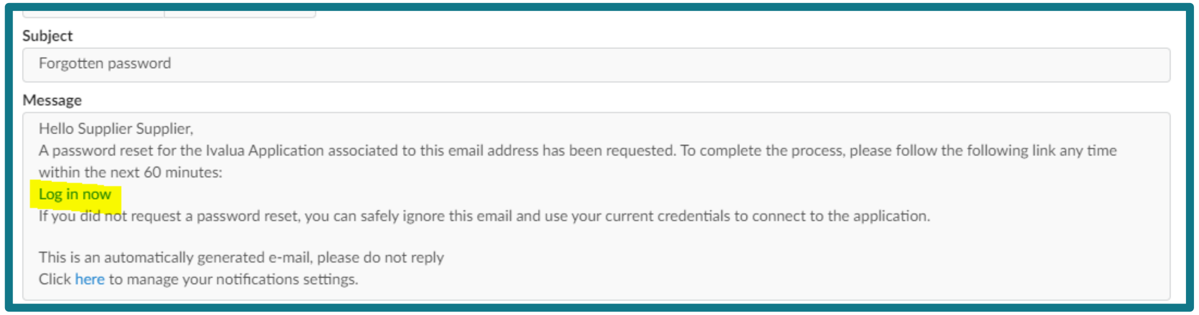
- Must be a total of 8 characters.
- Must contain at least one upper case letter (A-Z)
- Must contain at least one lower case letter (a-z)
- Must contain at least one number (0-9)
- Must NOT contain any other special characters
- Must be different than your previous 20 passwords



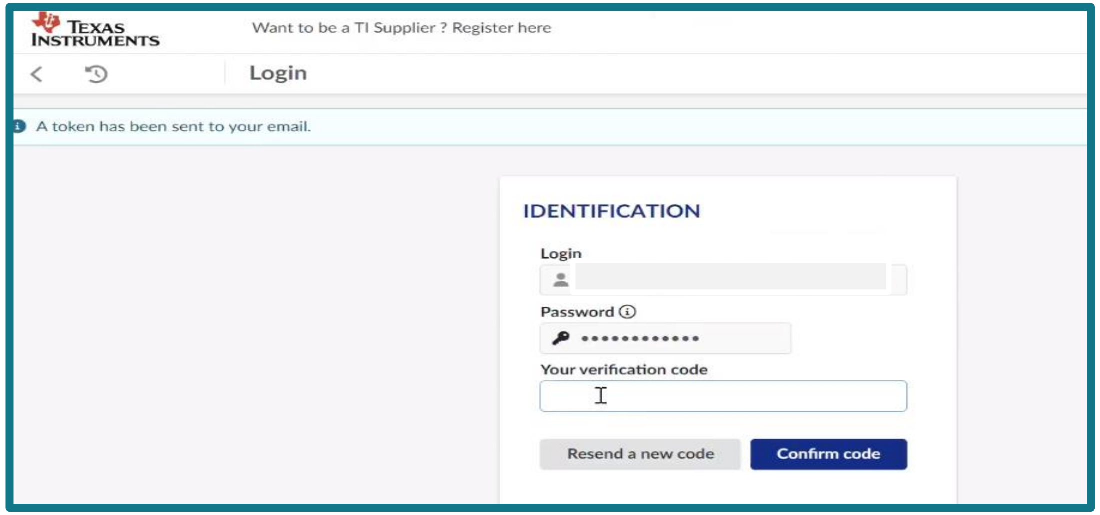


Supplier Registration, cont.

- You will receive the email below.
- Follow the instruction to set a password for your account.



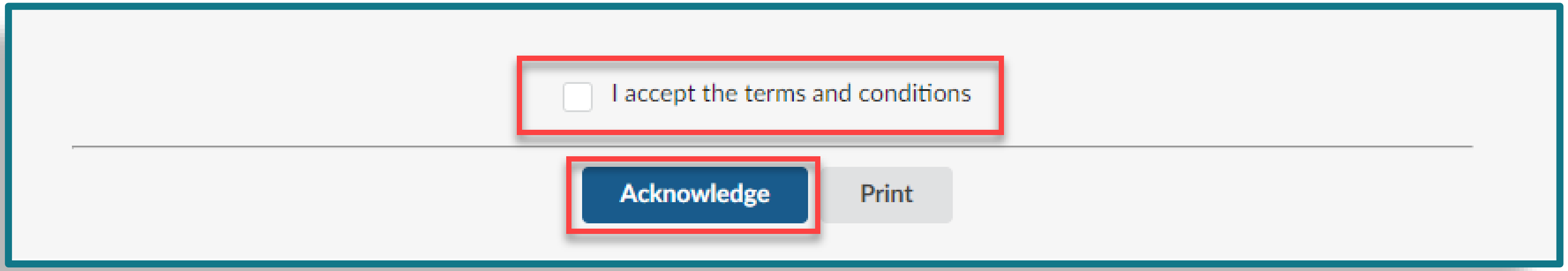
- Two factor authentication required. The token will be sent to your email.



General Terms of Use

- When logging into the system for the first time, you will be required to review and Accept the General Terms of Use.
  - These General Terms of Use are related to the use of the Supplier Portal. **These are not TI's Standard Terms and Conditions.**

- After reviewing, Select "I accept the terms and conditions"
- Press "Acknowledge"



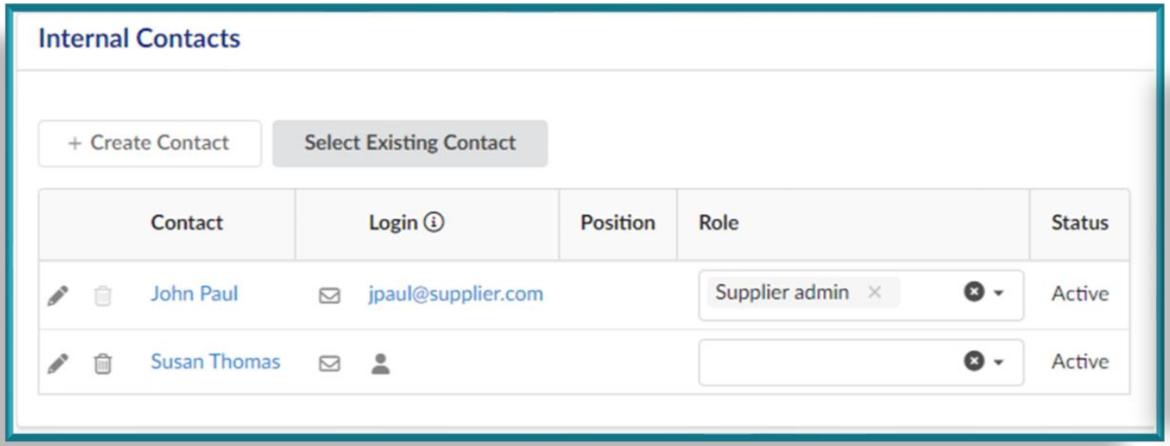
Trouble Logging In?

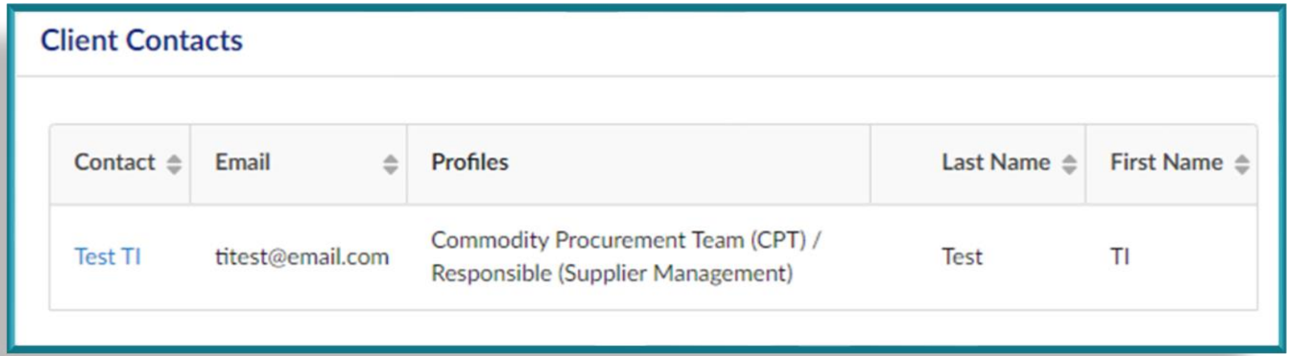
- If you need support logging into the portal, please use the contact information provided below.

Help Desk: support-ti@ivalua.com
FR: +33 75 64 50 87
US: +1 469 522 2599
SG: +65 6577 1178

Additional Contacts

- As the registered contact for your company (Internal Contacts), you will receive all communications related to your company's relationship with TI.
- If additional contacts are needed, you can initiate the account setup process on the Contacts tab.
  - We will cover this in more detail later.
- Client Contacts will contain contact information for resources at TI.

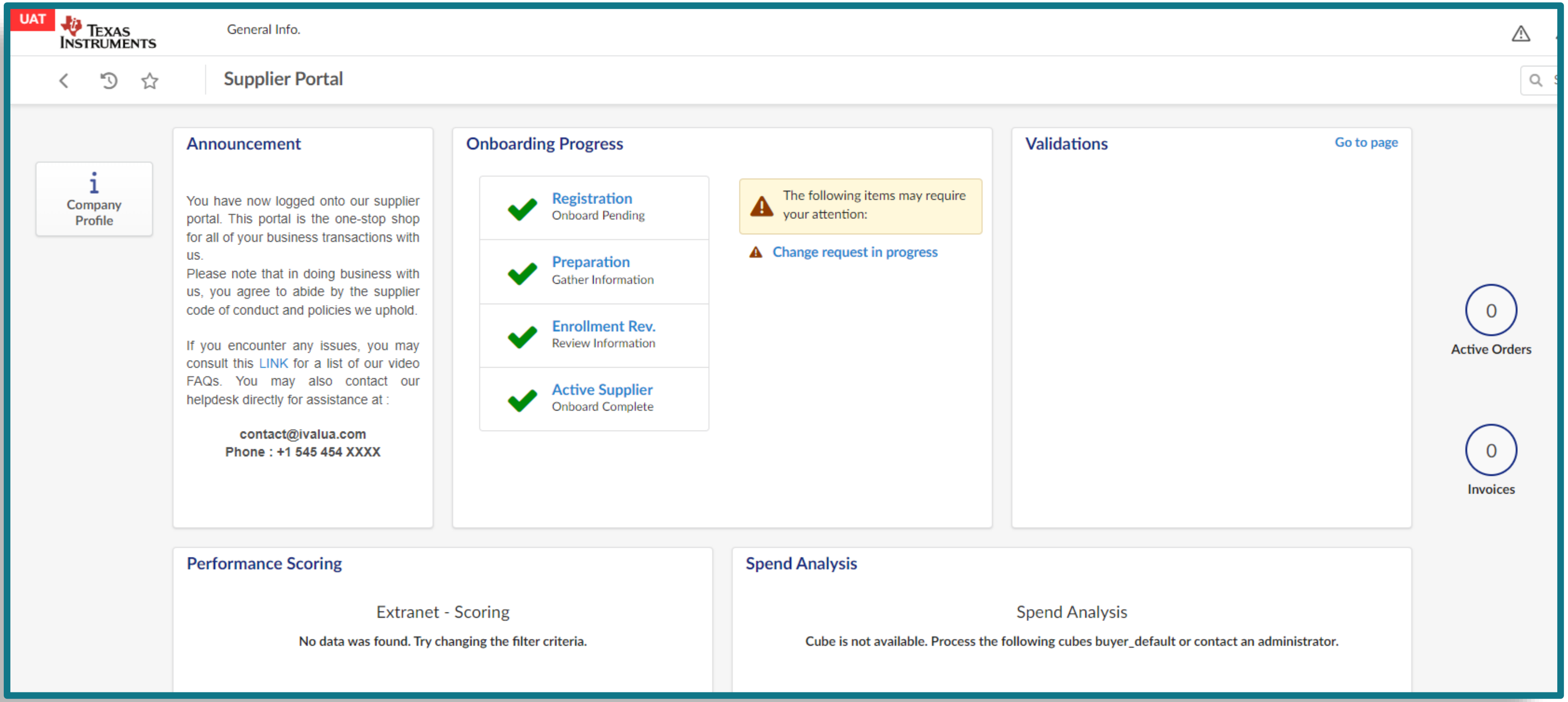




Navigating the Portal

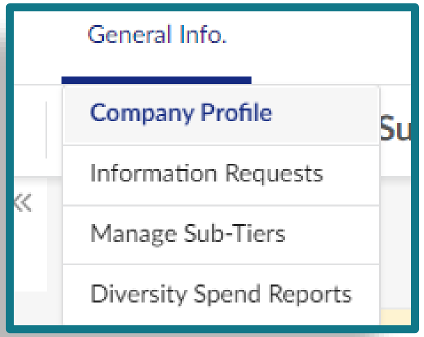
Supplier Home Page

- After accessing the system, you will be automatically directed to your Supplier Portal.



Supplier Home Page, cont.

The option at the top of the screen that will allow you to view information related to your relationship with TI.

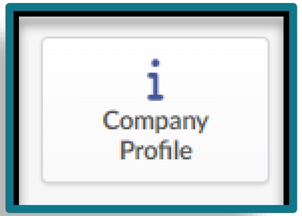


Menu Options:

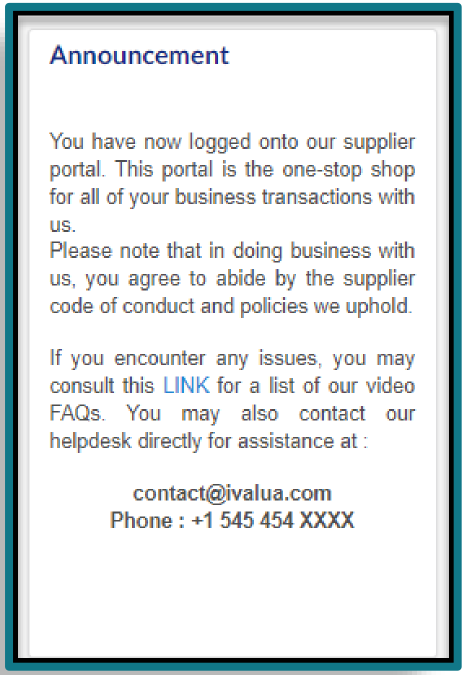
- Company Profile – Your company's information
- Information Request – Documents provided to TI
- Manage Sub Tiers – Will not be used at this time
- Diversity Spend Reports – Will not be used at this time

There is an additional option on left side of the screen.

- Company Profile will take you to your company's information



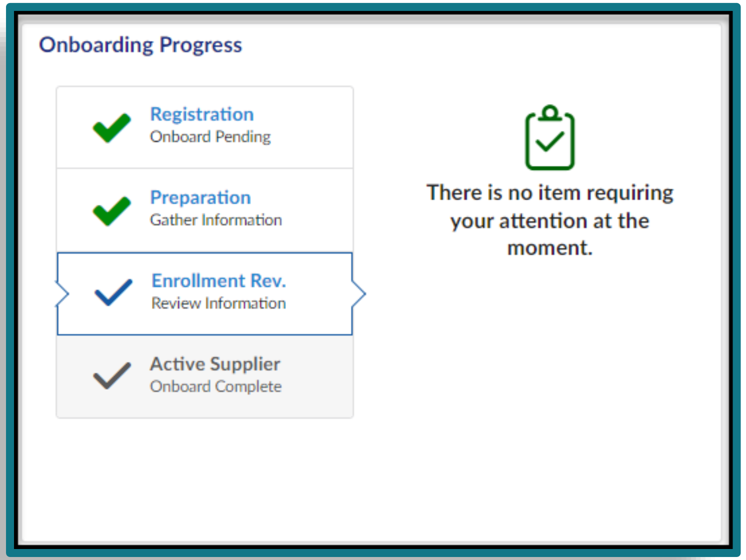
Supplier Home Page, cont.



Announcements will be used by TI to share important information to all suppliers.

Onboarding Progress will show the status of your onboarding process and alerts for change request.

You will have 4 green checkmarks when the onboarding process is complete.



Validations will display records here when you have pending actions to complete.

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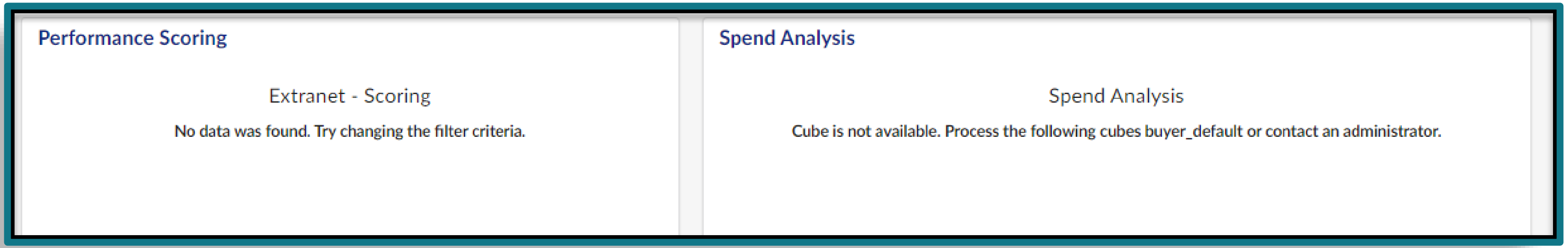
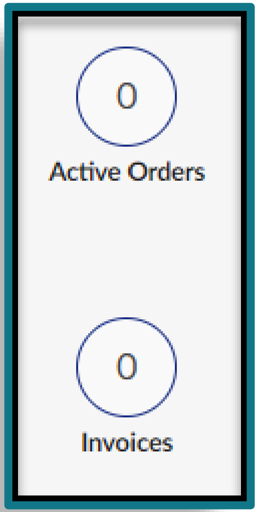
Supplier Home Page, cont.

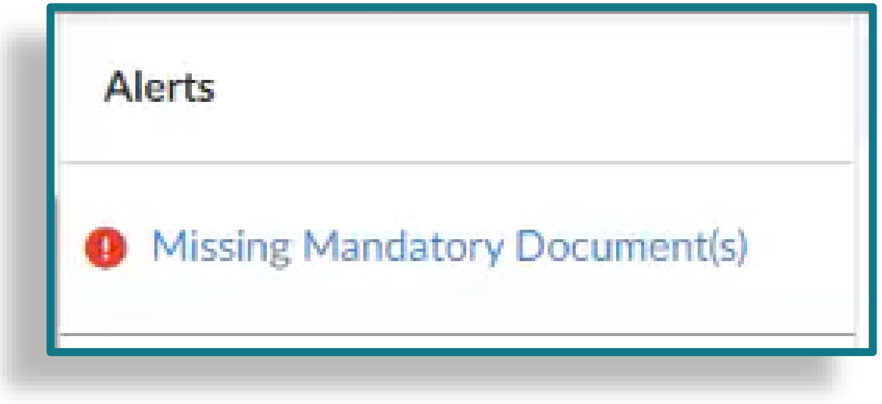
- The following dashboard are defaults but will not be used at this time.
  - Performance Scoring
  - Spend Analysis
  - Active Order
  - Invoices





Alerts

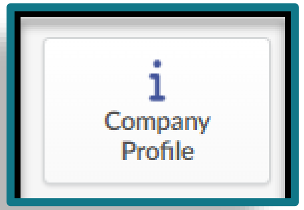
- During the Onboarding or Change Request processes, you may see Alerts on the right side of the screen.
- Alerts will indicate what information is being required from TI.
- Clicking on each alert will take you to the screen where the data must be entered.



- Complete the required information and click Save.

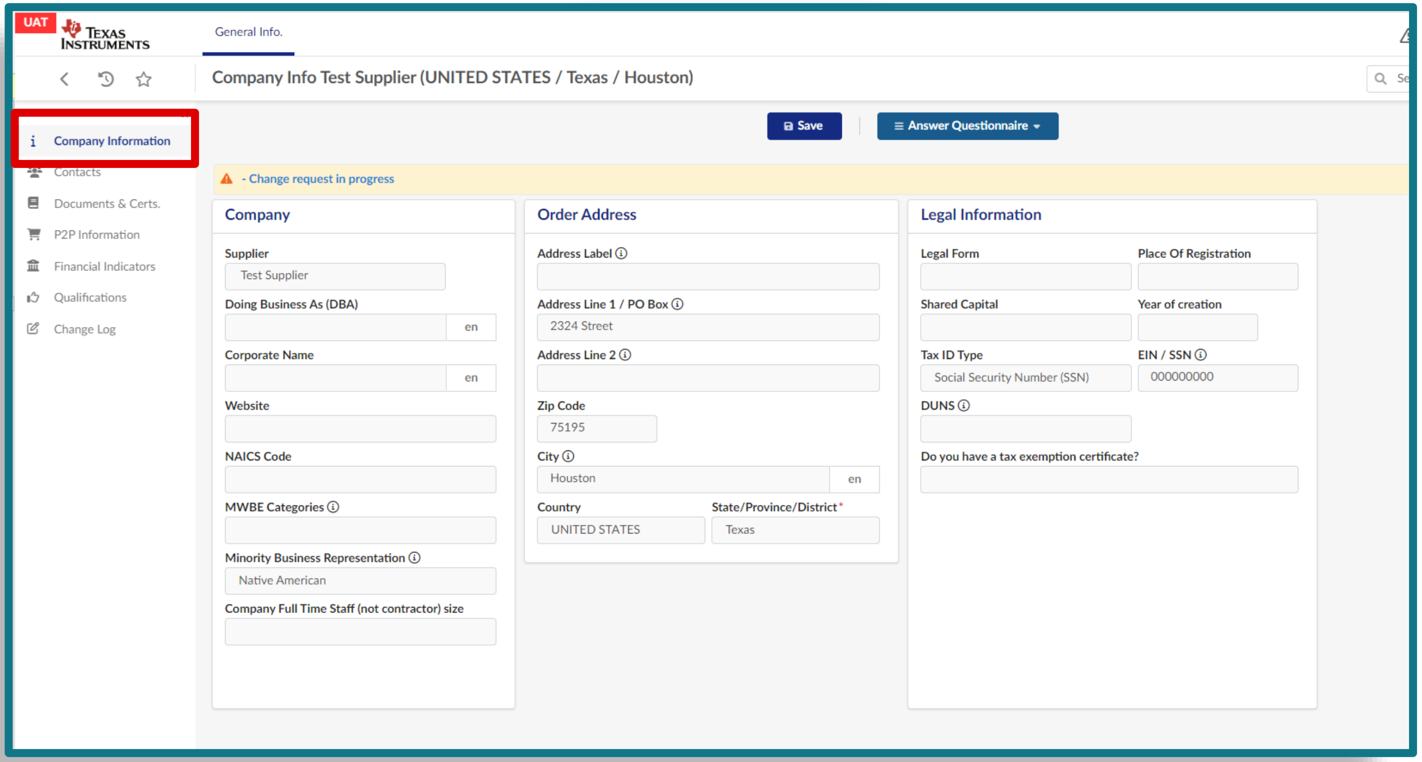
Company Information

- Once you click Company Profile, you will be able to view your company's information.



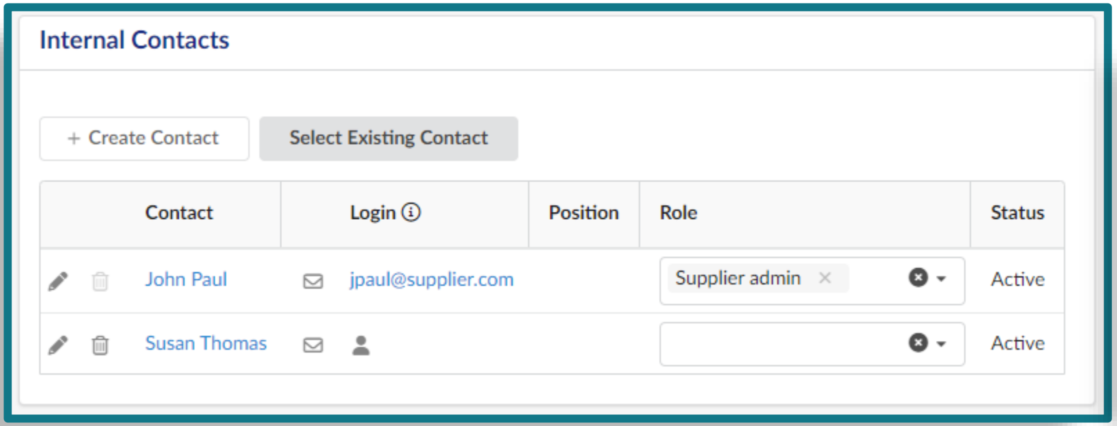
Information on this tab:

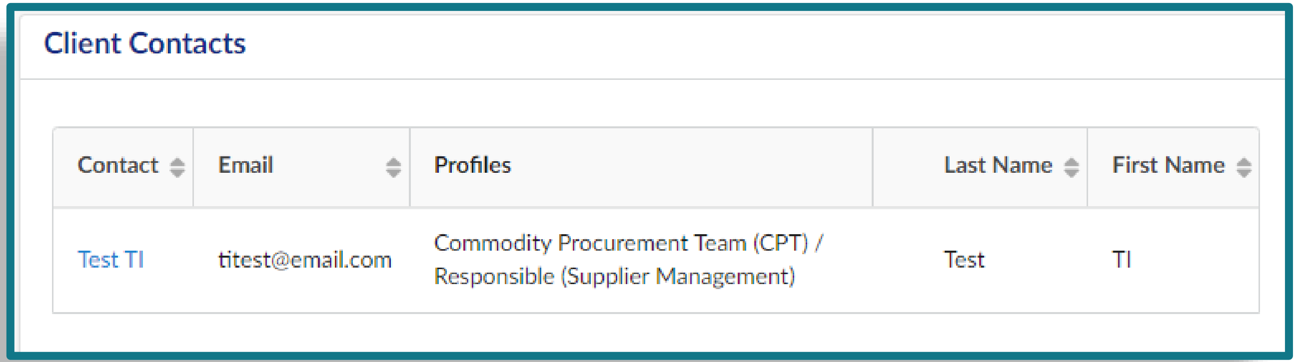
- Company Name
- Order or Payment Address
- Minority Business Identifiers
- Legal Information



Contacts

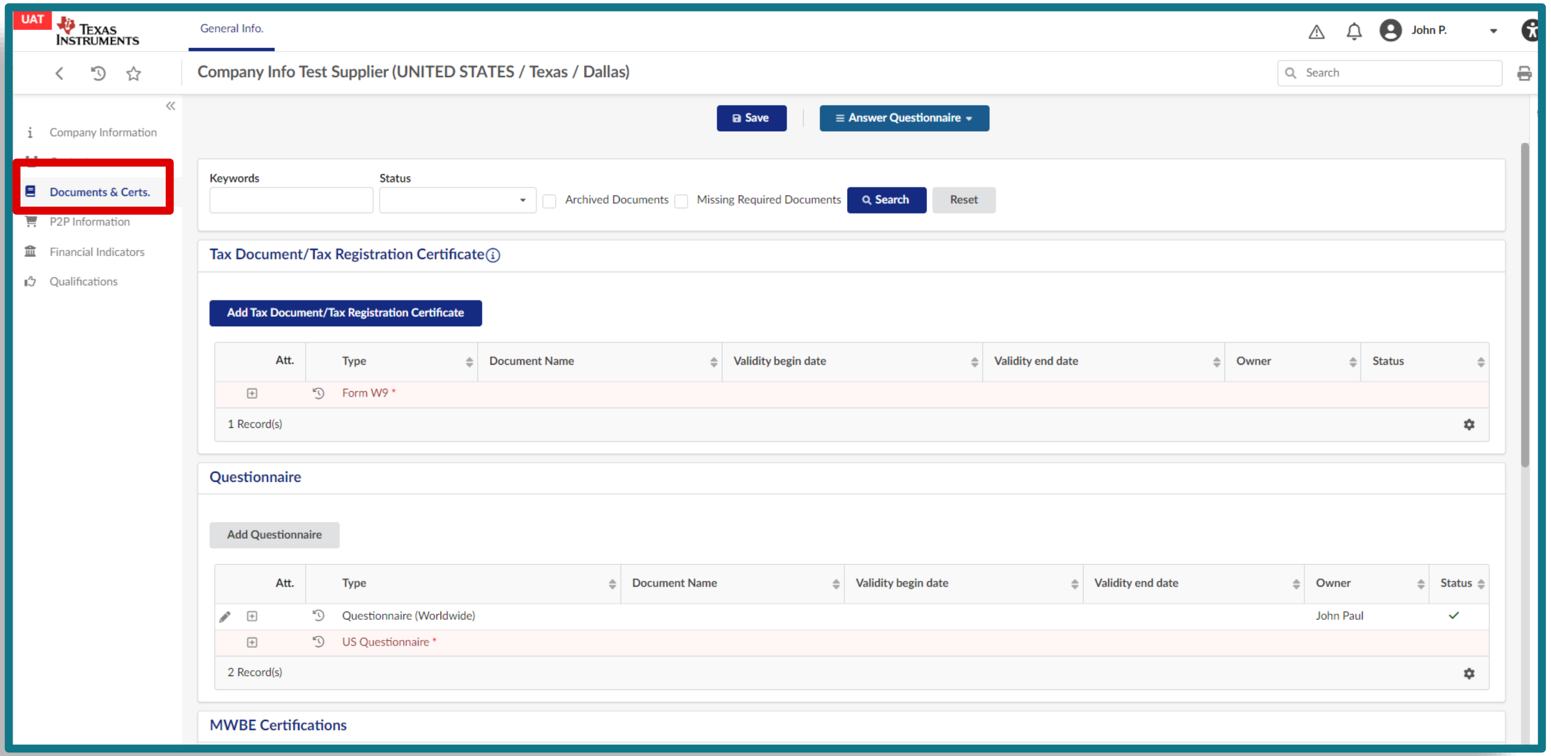
- **Internal Contacts** – Provides a list of contacts for your company who should access the portal
  - There are 3 primary types of contacts (Only one contact can be assigned to each type):
    - **Supplier Admin** – The contact is required for all account types and that will receive communications from TI.
      - The initial contact for the supplier will be responsible for entering the additional contacts. Instructions provided later.
    - **PO Recipient** – The contact is required for order accounts and will receive communication related to Purchase Orders
    - **Accounts Receivable** – The contact is required for payment accounts and will receive information related to payment.
- **Client Contacts** - Provides a list of contacts from TI who can be contacted with any questions related to your supplier profile.





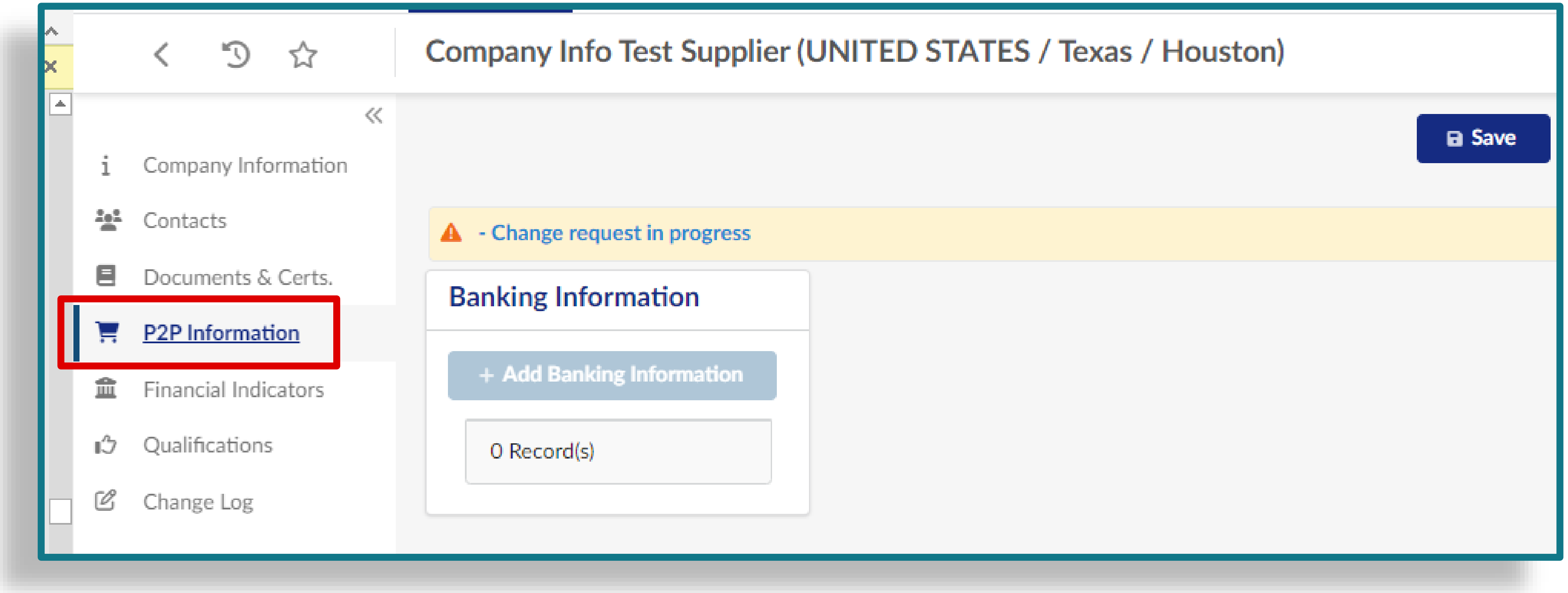
Documents & Certs.

- Will store all documents and certifications for your company.
- There will be Questionnaires that must be completed as part of the onboarding process
  - Note:
    - Red items indicates the document have not been submitted.
    - To archive an uploaded document, click on the pencil icon then click on Archive and click on Save.



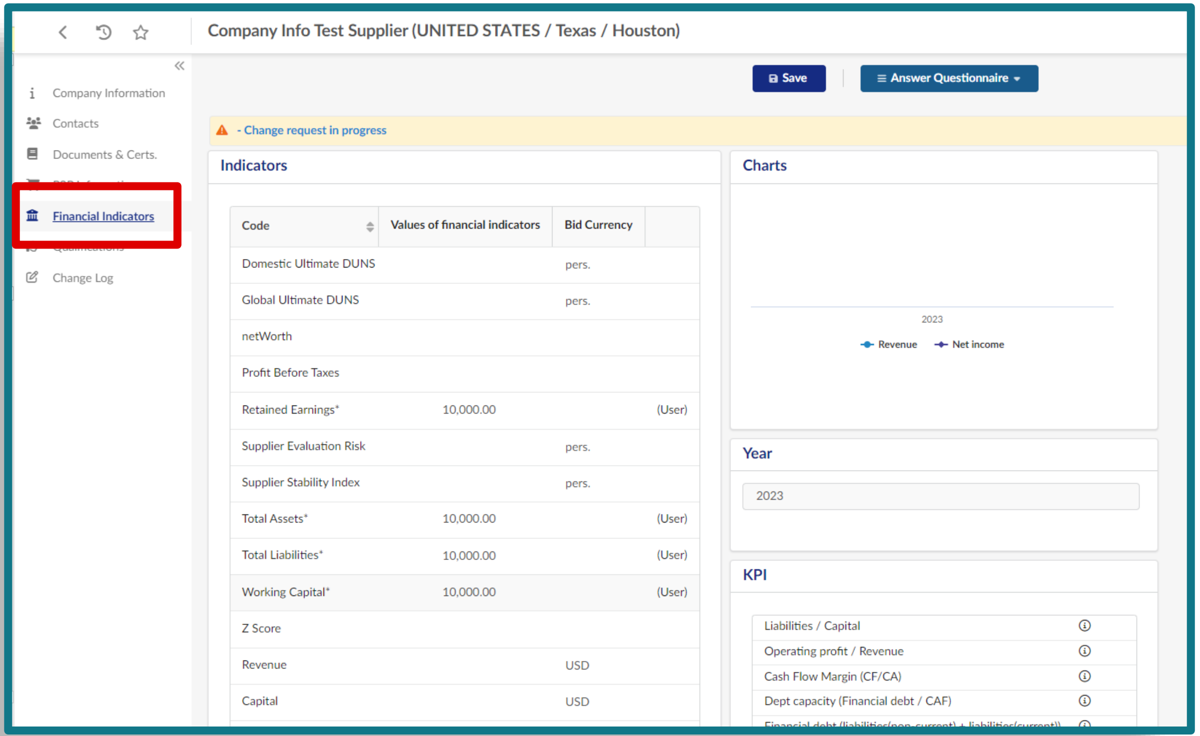
P2P Information

- P2P Information tab is used to store and update your Banking Information.
  - This is only applicable to Payment accounts.
  - Only one bank account can be linked to a payment account.



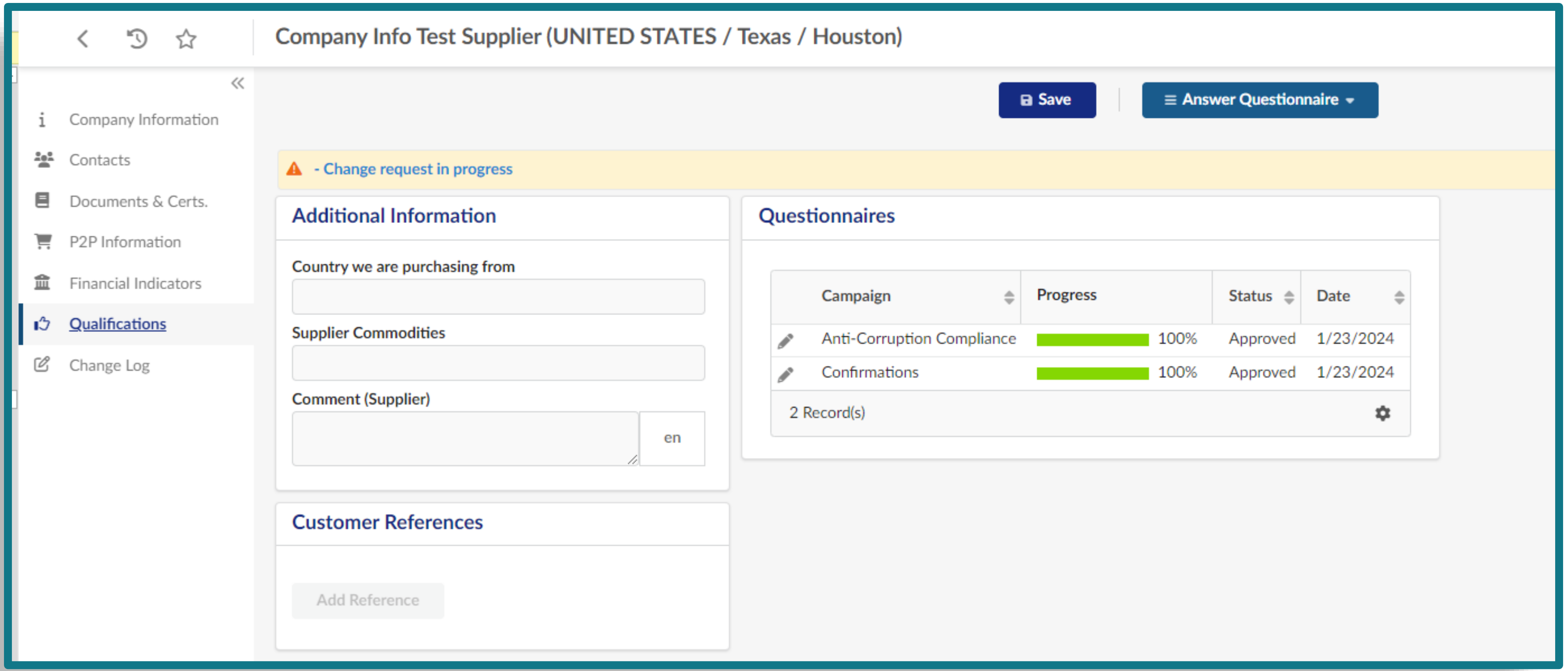
Financial Indicators

- This tab will show financial information provided by Dunn & Bradstreet.
  - If financial information is not returned from Dunn & Bradstreet, you will be required to complete a Financial Questionnaire.
- Financial Indicators are only needed for order accounts.
- Your Z-Score will be displayed



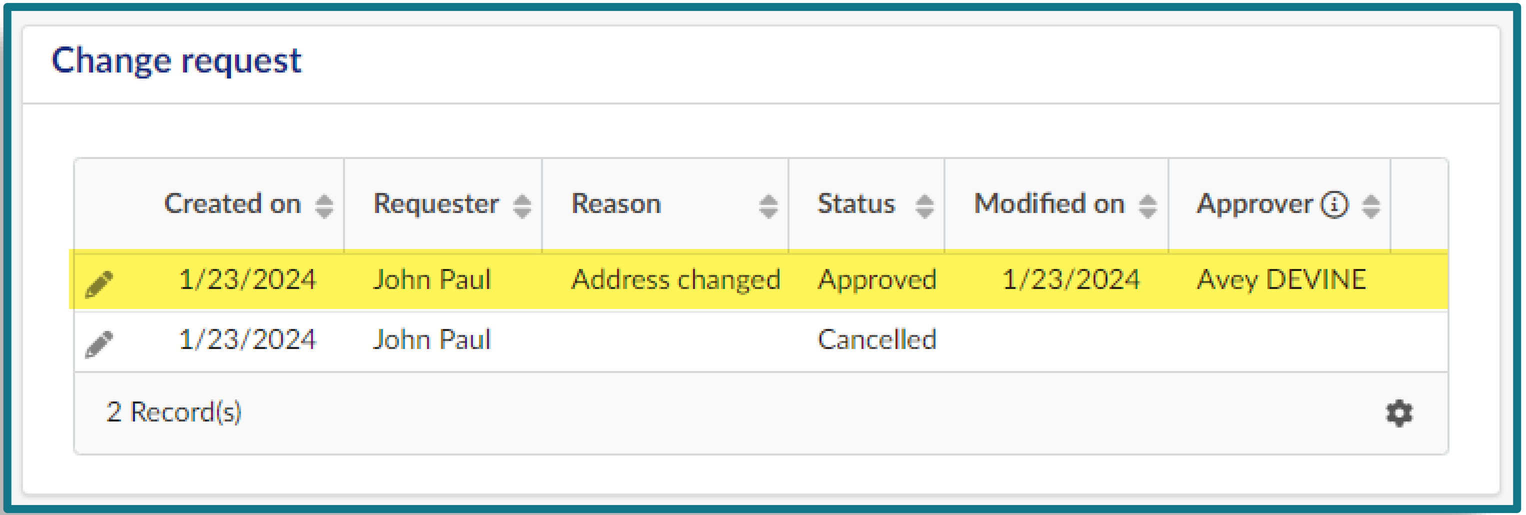
Qualifications

- Qualifications will provide a list of Questionnaires that have been submitted to TI.
- You can also answer Questionnaires from this tab using the Answer Questionnaire button.
  - Begin Dates for Questionnaire cannot be in the future.
- After a questionnaire has been saved, use the Edit (Pencil Icon) to view the answers.
  - *After a questionnaire is saved, it cannot be changed*. A change request is required to complete a new questionnaire.



Change Log

- Provides log of Change request submitted for your company
  - You can use this tab to monitor the status of your change request



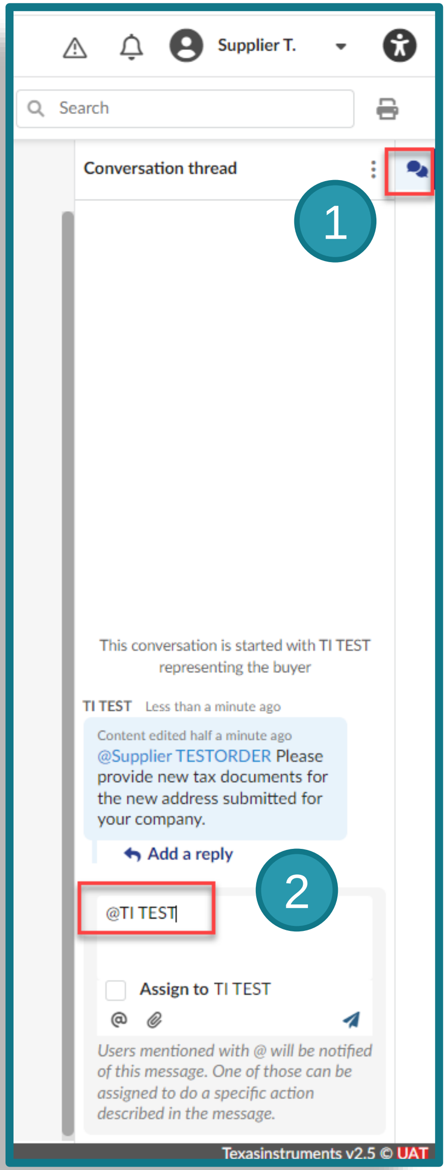
Change request

	Created on	Requester	Reason	Status	Modified on	Approver
	1/23/2024	John Paul	Address changed	Approved	1/23/2024	Avey DEVINE
	1/23/2024	John Paul		Cancelled		

2 Record(s)

Portal Conversation

- TI will use Conversations to communicate information to you.
  - Conversations will take the place of using email to ask questions or respond to request from TI.
    - *Example:* Sharing what documents are required for the address change for your company.
  - Conversations can be found on the right side of the screen. 1
  - It is important to use "@name" to tag the TI contact you are trying to reach or respond to. 2

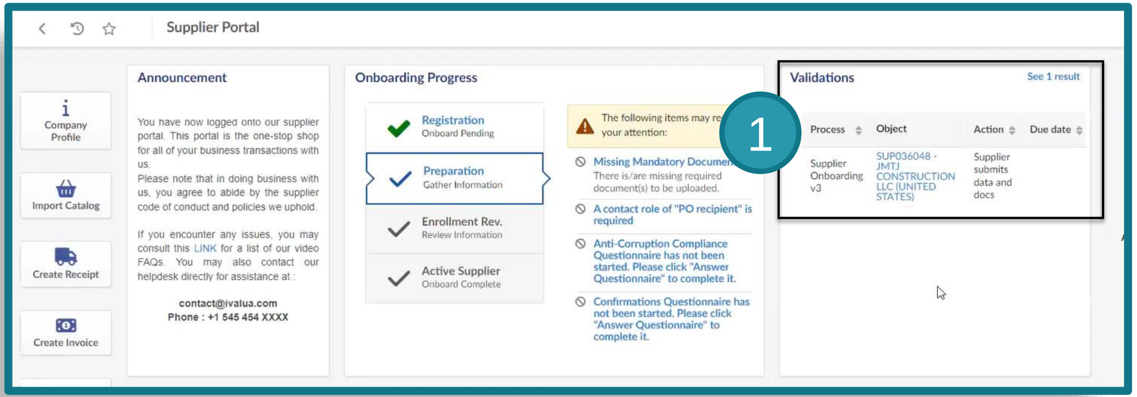


Supplier Onboarding – Order Account

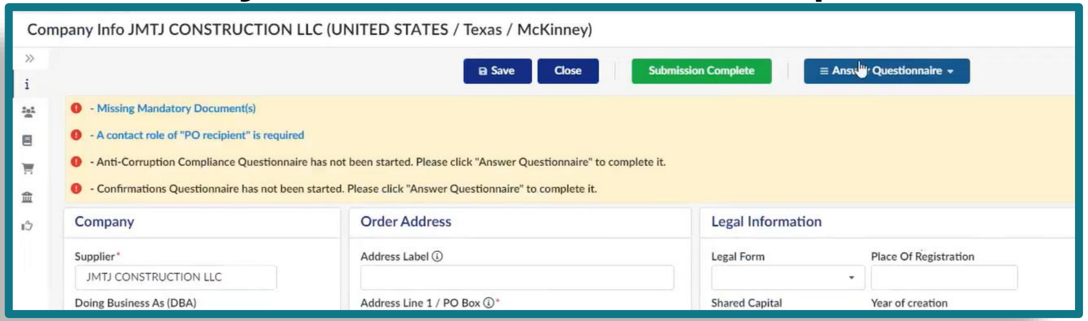
Validations

- During the Onboarding process, you will find actions pending in the Validations section.

Step 1: Click the link under the Object column.

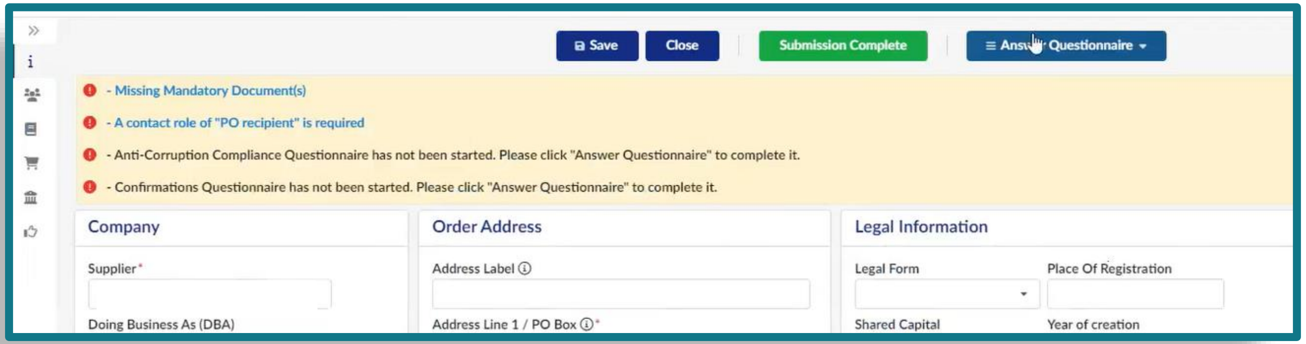


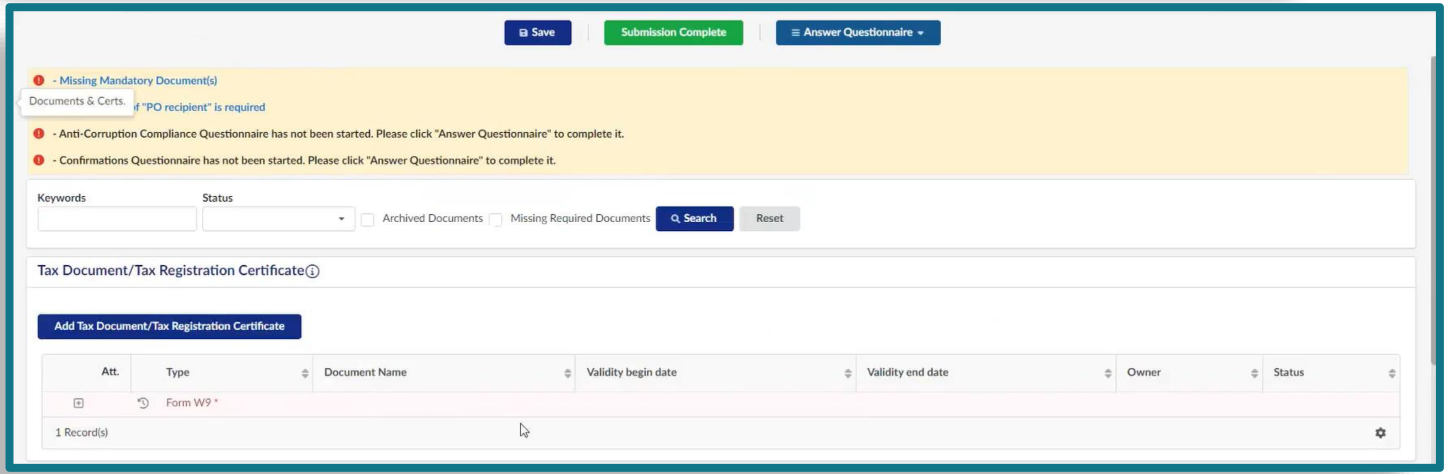
- This will open the company information and you can view the required information at the top of the screen.



Validations, cont.

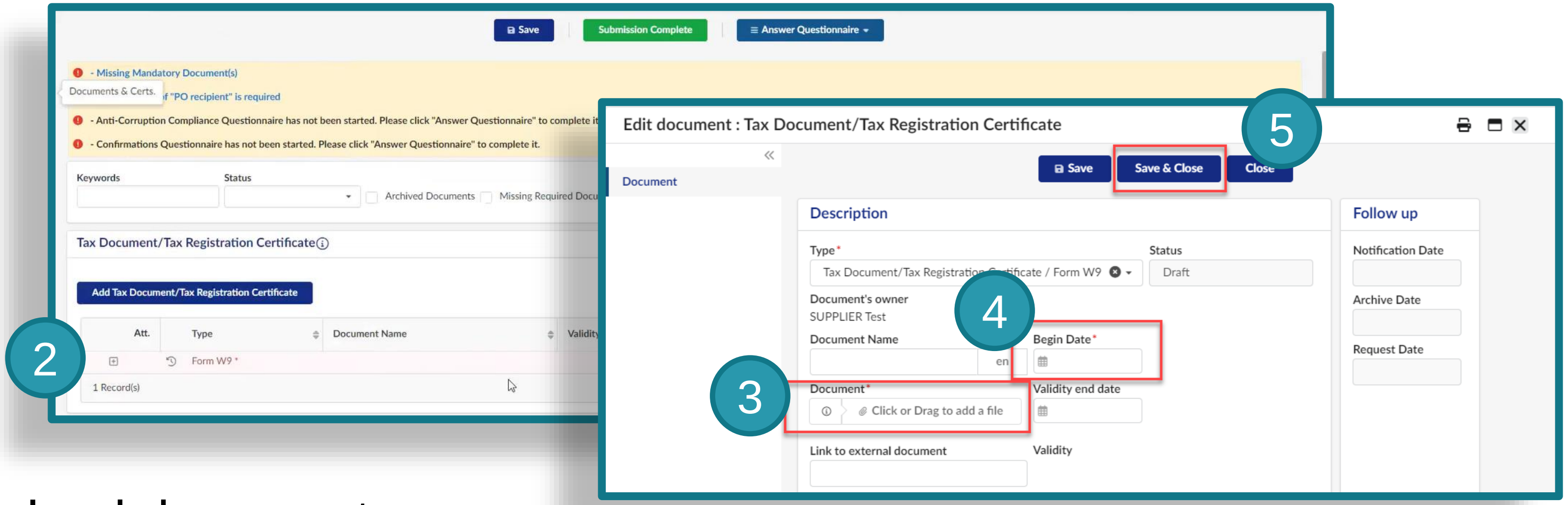
- Clicking on each requirements will bring you to the screen where that information should be entered.





Submitting Documents

Step 2: Click the ‘+’ icon



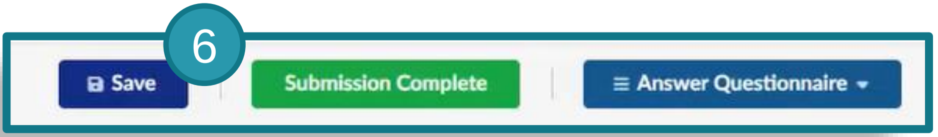
Step 3: Upload document

Step 4: Enter Begin Date for the document. (This is the effective date for the document being provided.)

Step 5: Click Save and Close

Validity End Date is not required

Step 6: Click Submission Complete to submit Document to TI.



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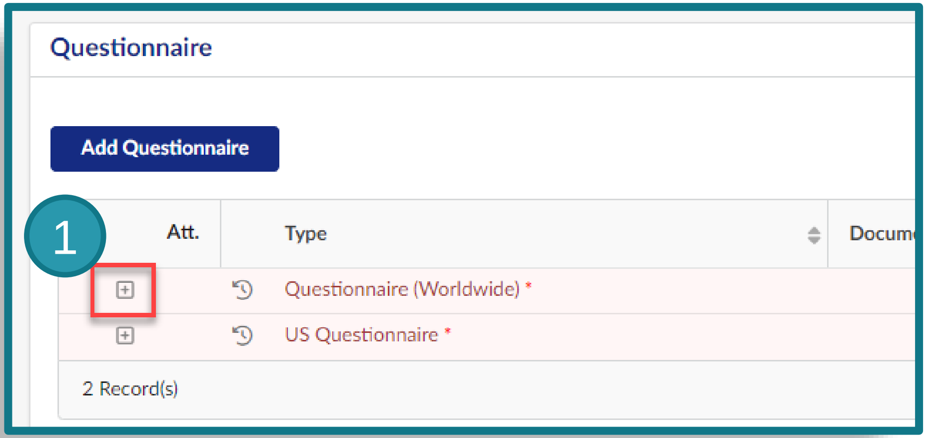
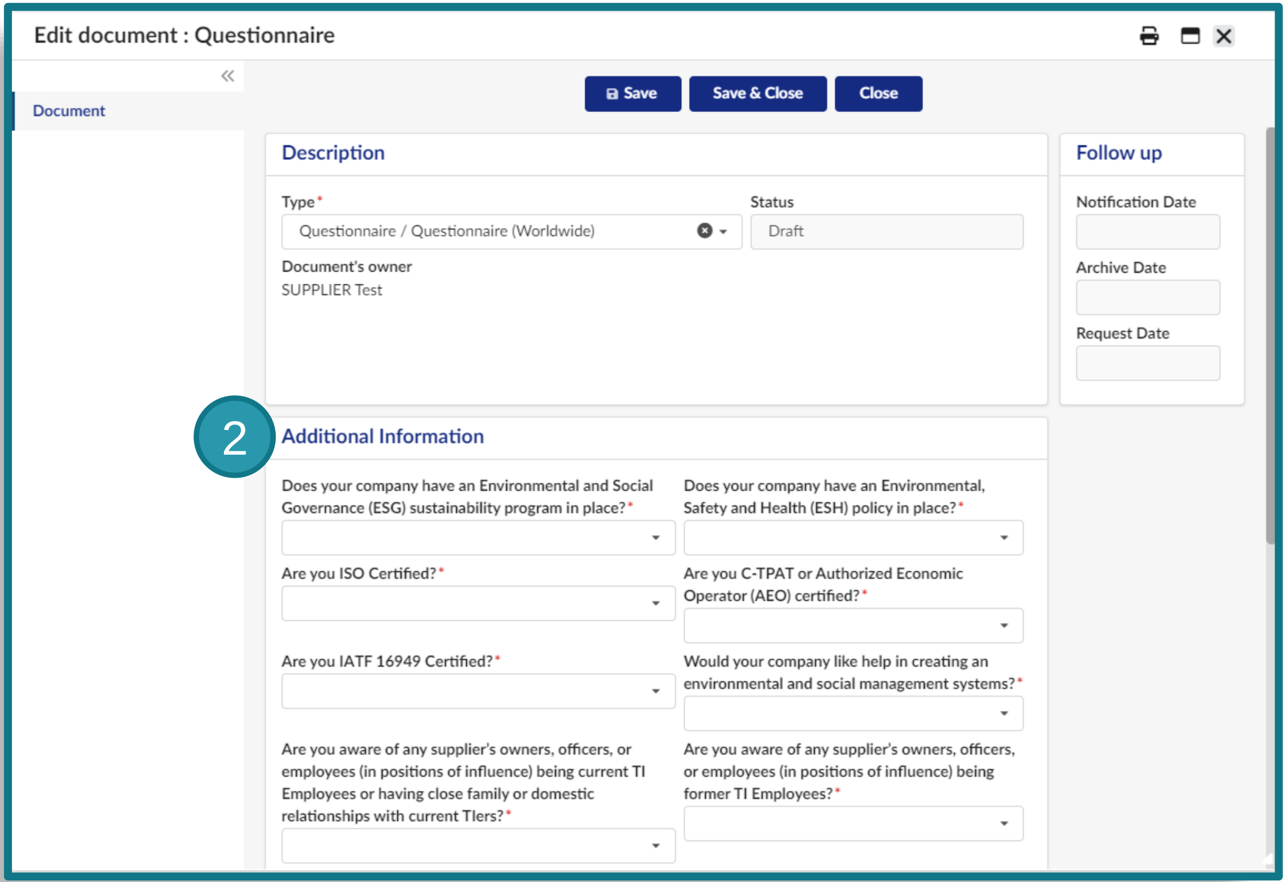
Submitting Questionnaires

Step 1: Click the ‘+’ icon to open the questionnaire



- **Step 2:** Respond to all questions.

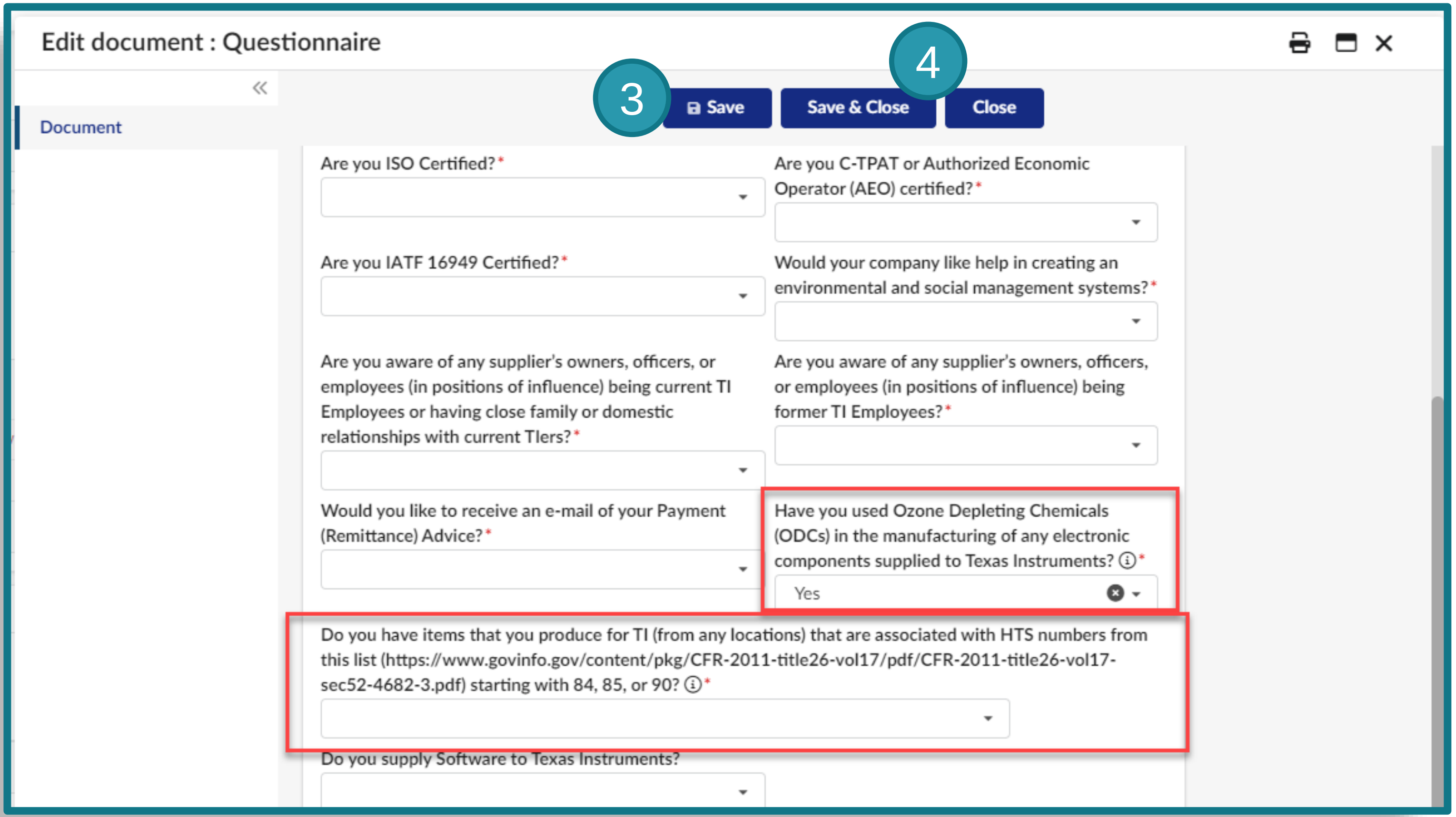


Submitting Questionnaires, cont.

- Important to note: If you answer Yes to the outlined question, you will need to review this document and respond to the 2nd outlined question.

Step 3: Click Save to save inputs and ensure no fields have been missed.

Step 4: Click Save & Close

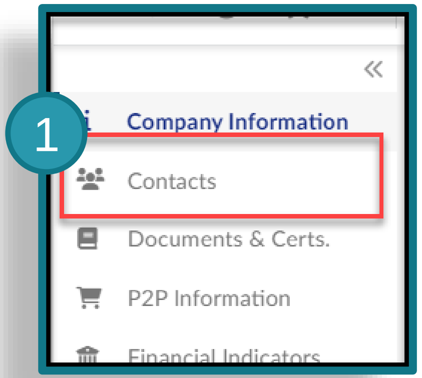


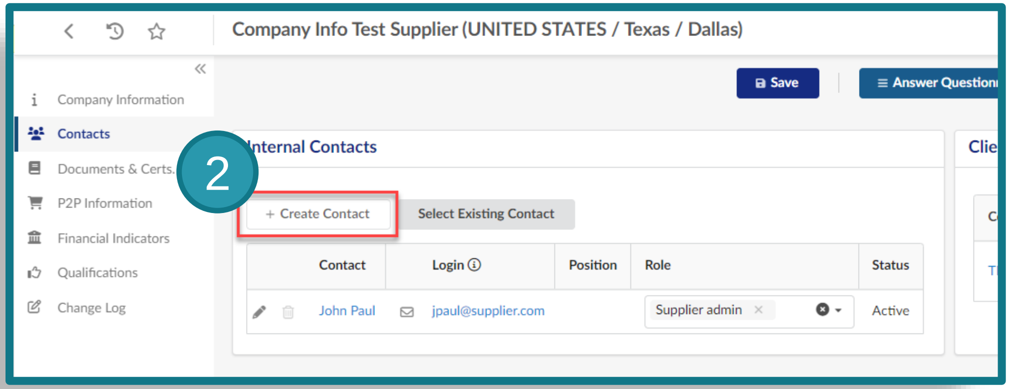
Create a New Contact

- Contacts should be maintained to ensure TI has an active party to reach out to when needed.
- Contacts for your company will be able to access the supplier portal and update critical information for your company. We recommend that you use an individuals’ email address and not utilize an email list so security reasons.
- Adding a Contact
  - Create a New Contact – add a contact that is not already existing in the portal
  - Select Existing Contact – select a contact that is already existing in the portal. This contact could also be listed an order account or payment account.

Step 1: Click the Contacts tab on the left side of the screen

Step 2: Click Create Contact





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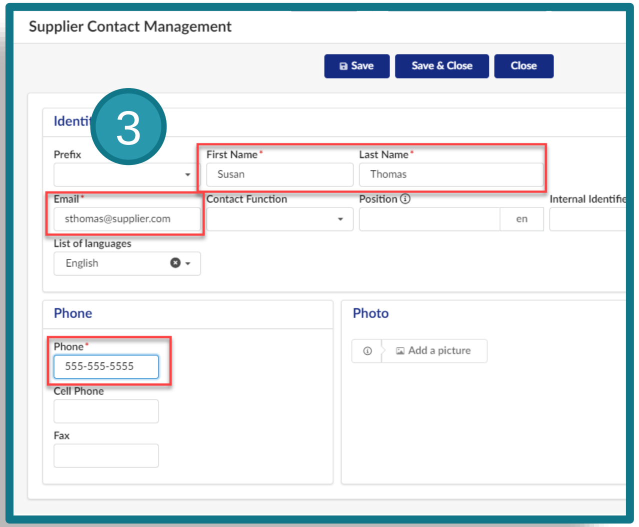
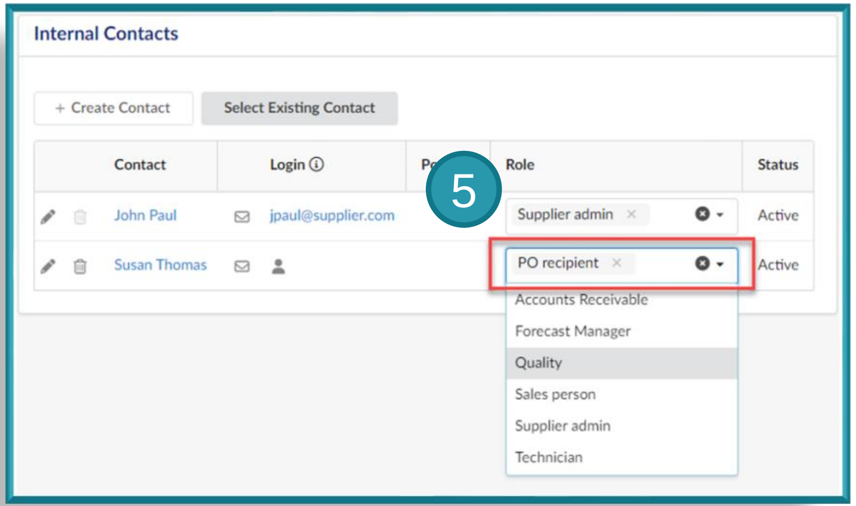
Create a New Contact, cont.

- **Step 3:** Enter the required details:
  - First Name
  - Last Name
  - Email
  - Phone



- **Step 4:** Click Save and Close

- **Step 5:** Select a Role for the contact (Only one contact can be assigned to each type)
  - PO Recipient – Required for order accounts to identify who will receive communications related to Purchase Orders
  - Accounts Receivable – Required for payment accounts to identify who will receive information related to payments
  - Other contacts are optional

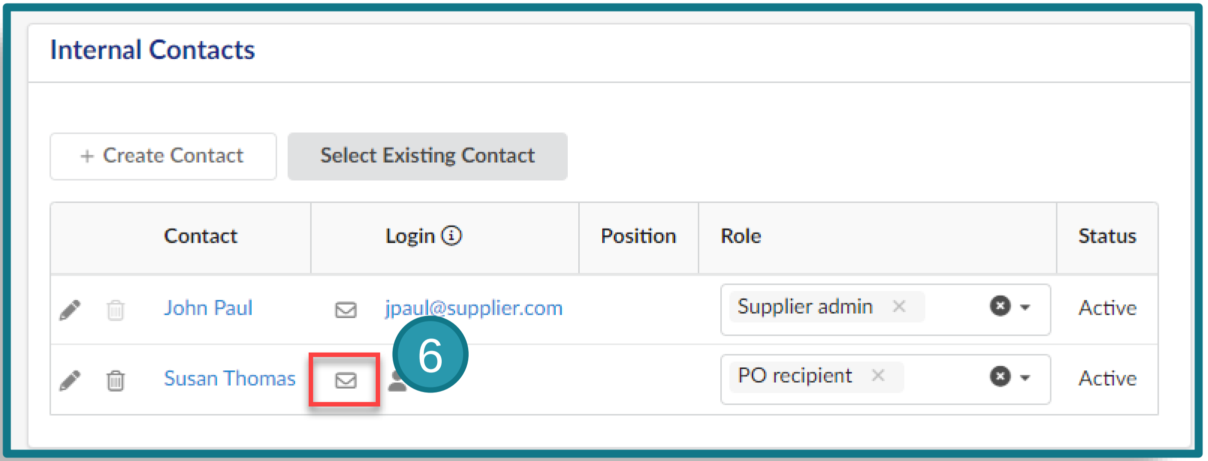


The Supplier Admin role should not be reassigned until that resource has been added as a contact and signed into the portal.

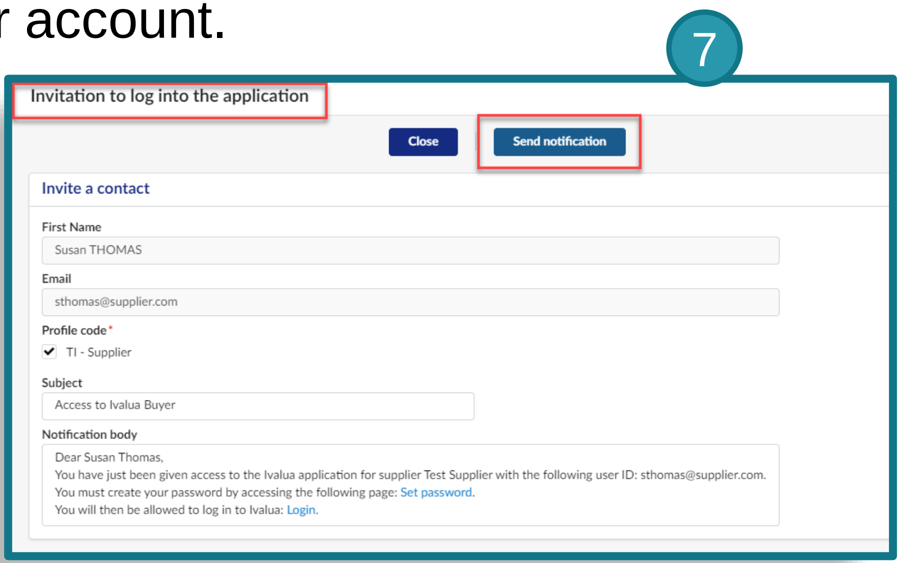
Create a New Contact, cont.

- After creating the contact and assigning a role, you must invite the contact to register.

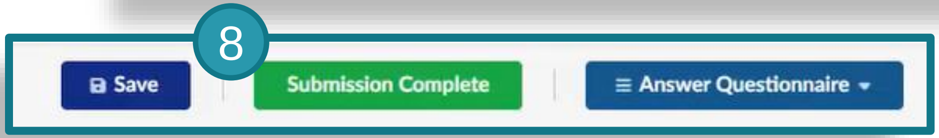
Step 6: Click the envelope to send the registration invitation email to the additional contacts.



Step 7: On the Invitation to log into the application window, click Send Notification. The contact will receive the email needed to create a password for their account.



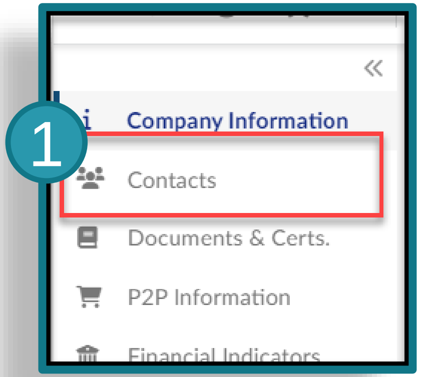
Step 8: Click Submission Complete once all error have been cleared.

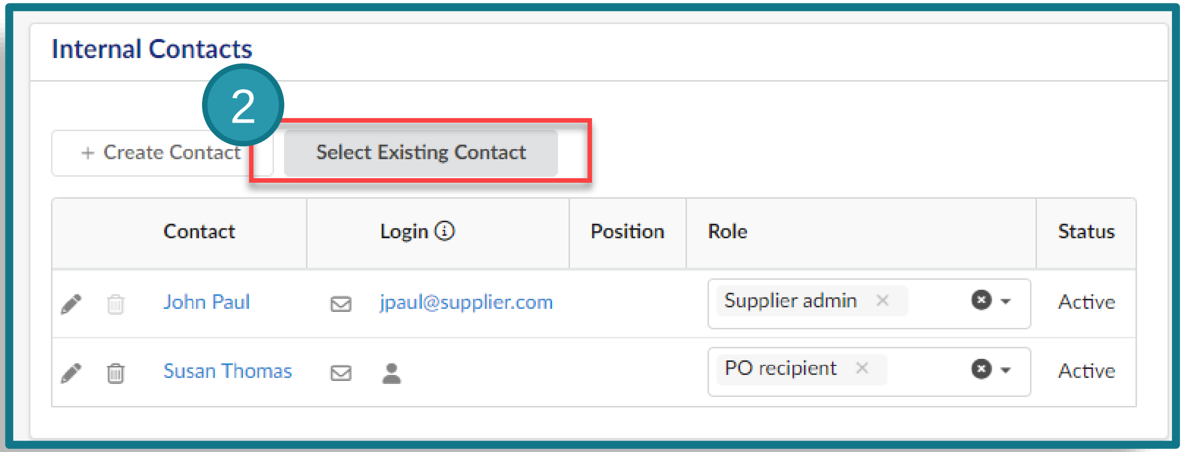


Select Existing Contact

Step 1: Click the Contacts tab on the left side of the screen

Step 2: Click Select Existing Contact

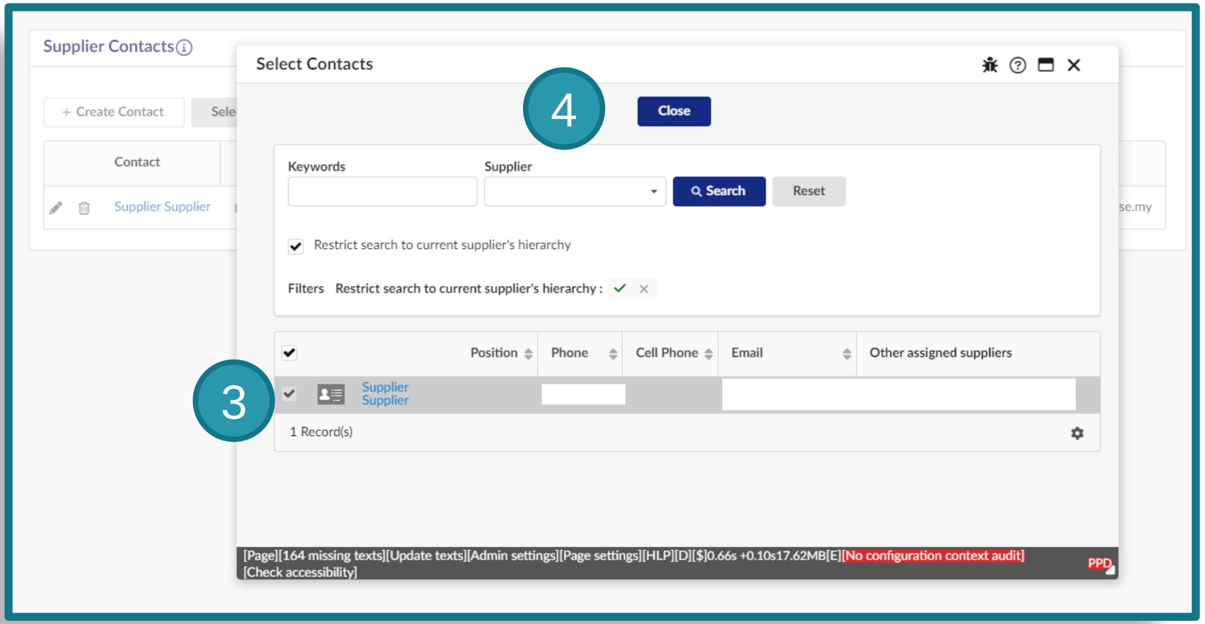




Select Existing Contact

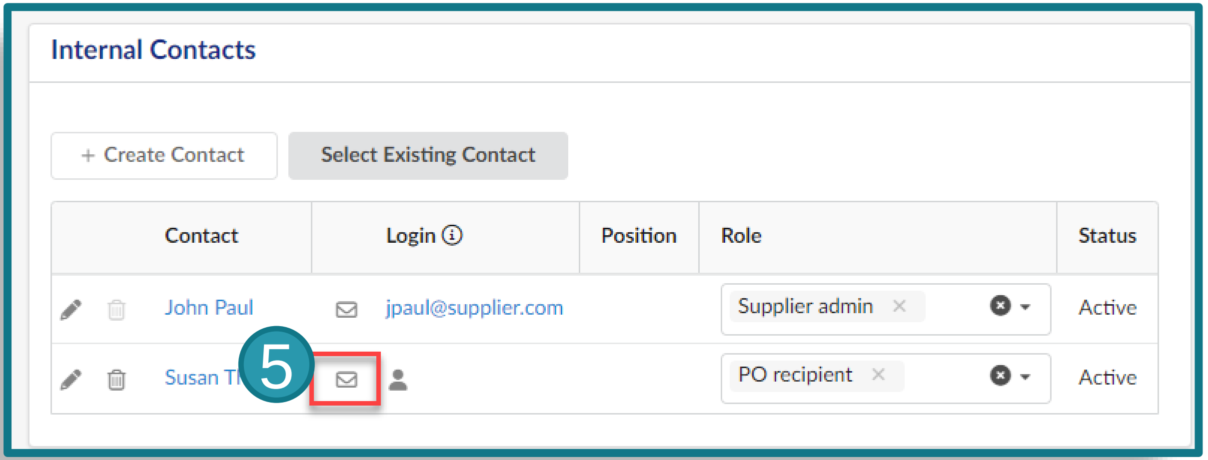
- A window will appear with a list of contact that are available for selection for your company.

- **Step 3:** Make a selection by clicking the checkbox next to the contact name.
- **Step 4:** Click Close

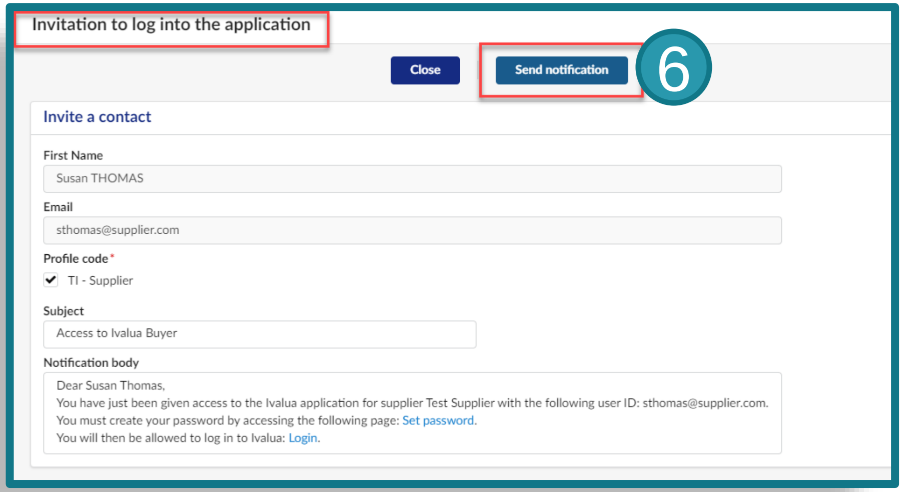


Select Existing Contact

Step 5: Click the envelope to send the registration invitation email to the additional contacts.



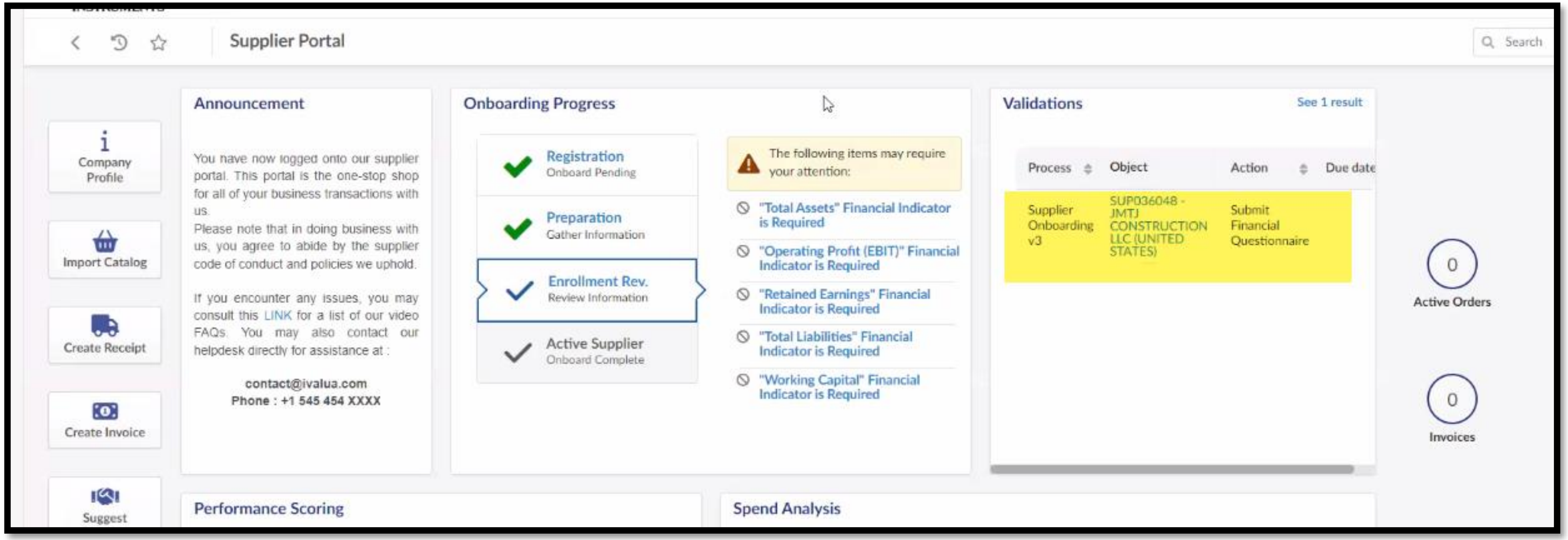
Step 6: On the Invitation to log into the application window, Click Send Notification



The contact will receive the email needed to create a password for their account.

Financial Questionnaire

- If financial information is not returned from Dunn & Bradstreet, you will be required to complete the Financial Questionnaire.
- In Validations, you will see an action, as listed below. Click your company's name under Object.
- The system will take you to the screen where the data is required.



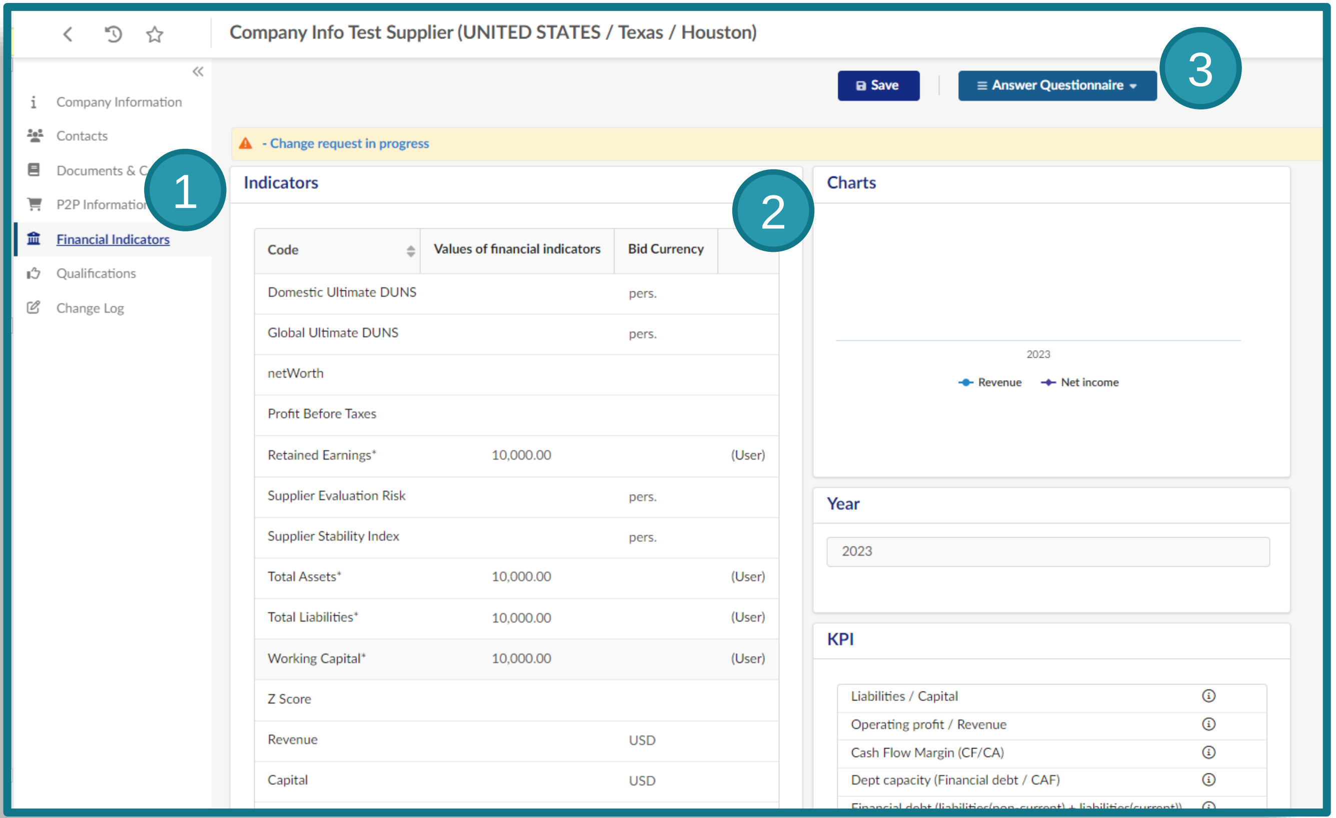
Financial Indicators

- Financial Indicators are only needed for order accounts.
- Financial Indicators will populate from Dun & Bradstreet where available.
- When it is not available, TI will initiate a request for you to submit a Financial Questionnaire

Step 1: Click Financial Indicators

Step 2: Enter financial information

Step 3: Click Submit Financial Questionnaire



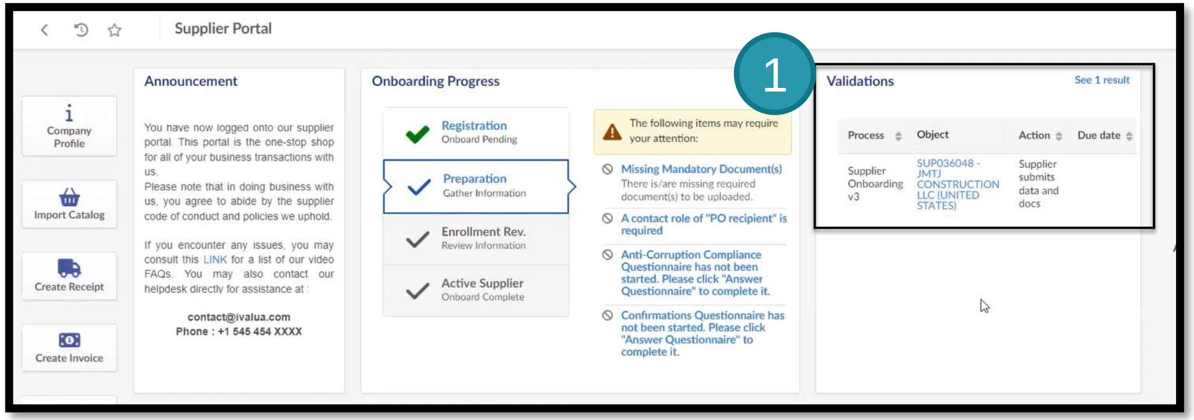
Once your request is submitted, TI will review and respond.

Supplier Onboarding – Payment Account

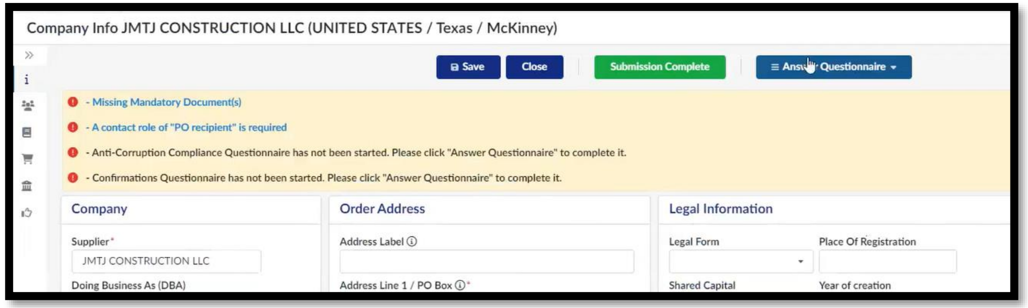
Validations

- During the Onboarding process, you will find actions pending in the Validations section.

Step 1: Click the link under the Object column.

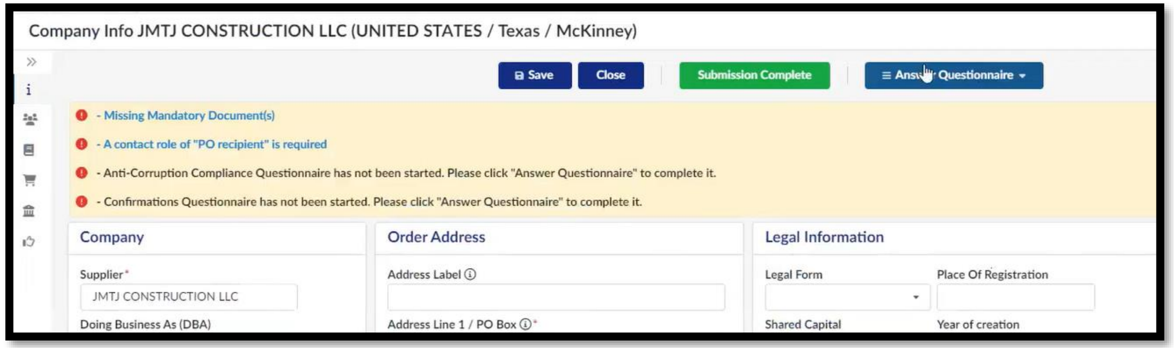


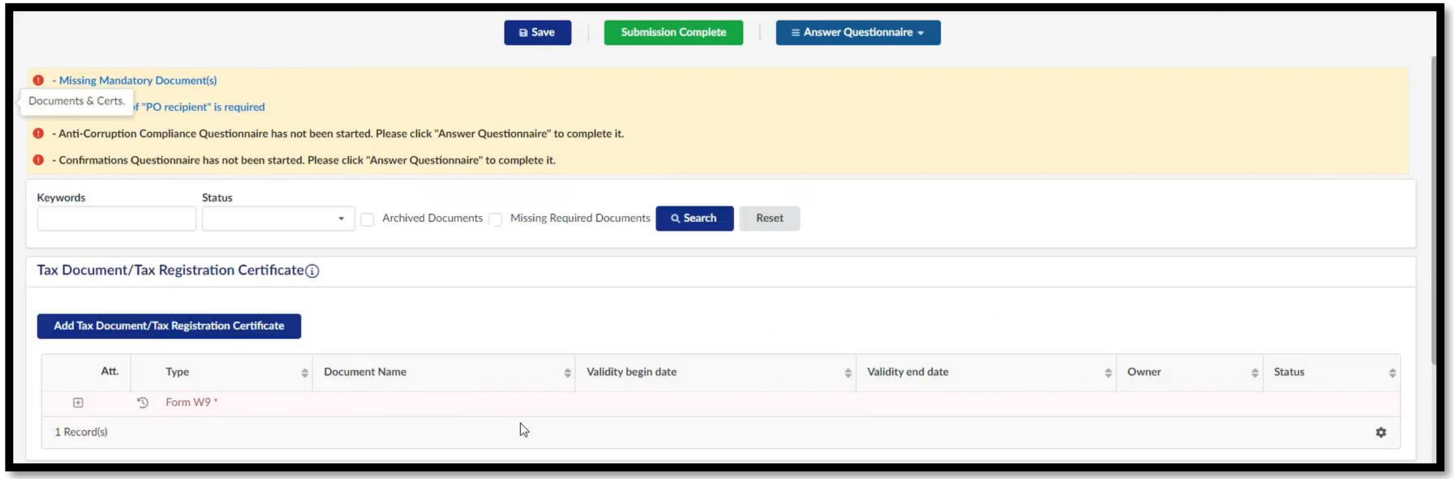
- This will open the company information and you can view the required information at the top of the screen



Validations, cont.

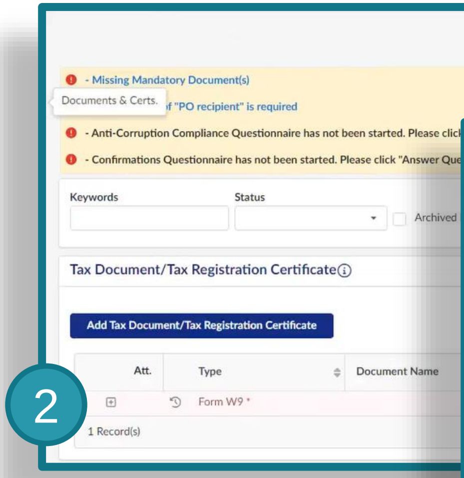
- Clicking on each requirements will bring you to the screen where that information should be entered.

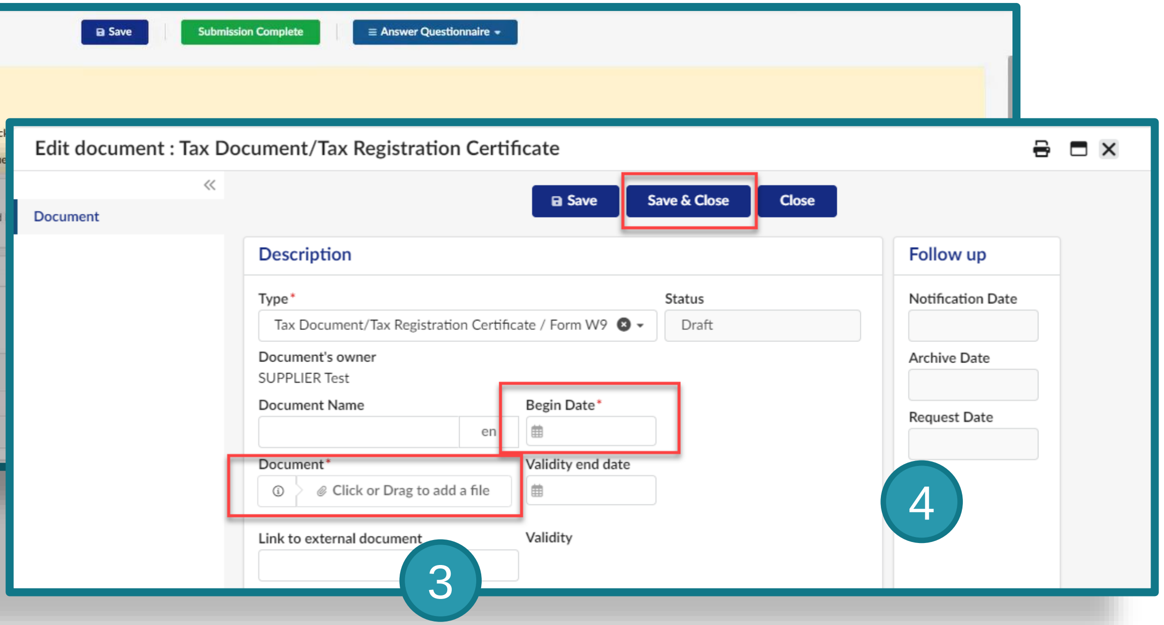




Submitting Documents

Step 2: Click the ‘+’ icon

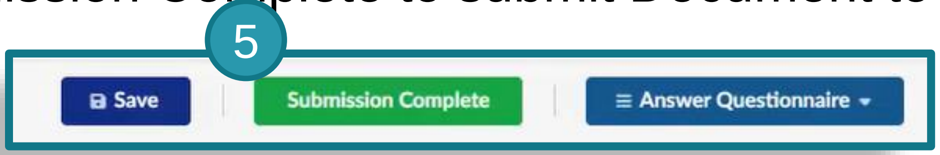




Step 3: Upload document

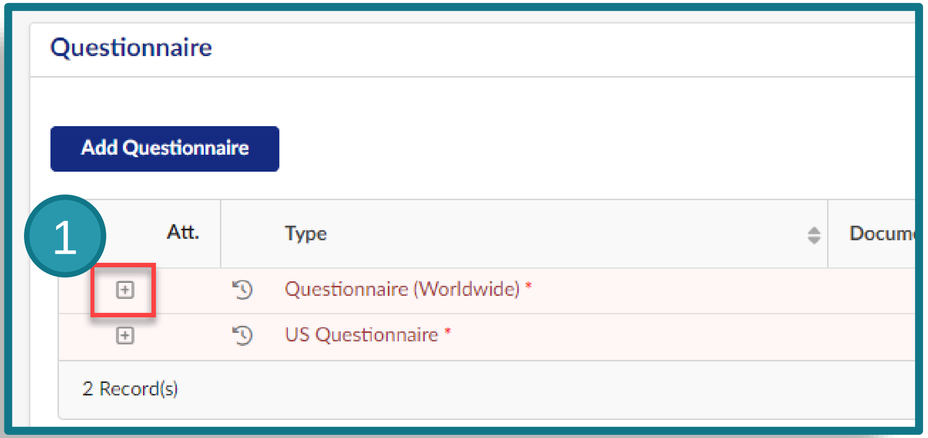
Step 4: Enter Begin Date for the document. (This is the effective date for the document being provided.)

Step 5: Click Submission Complete to submit Document to TI.

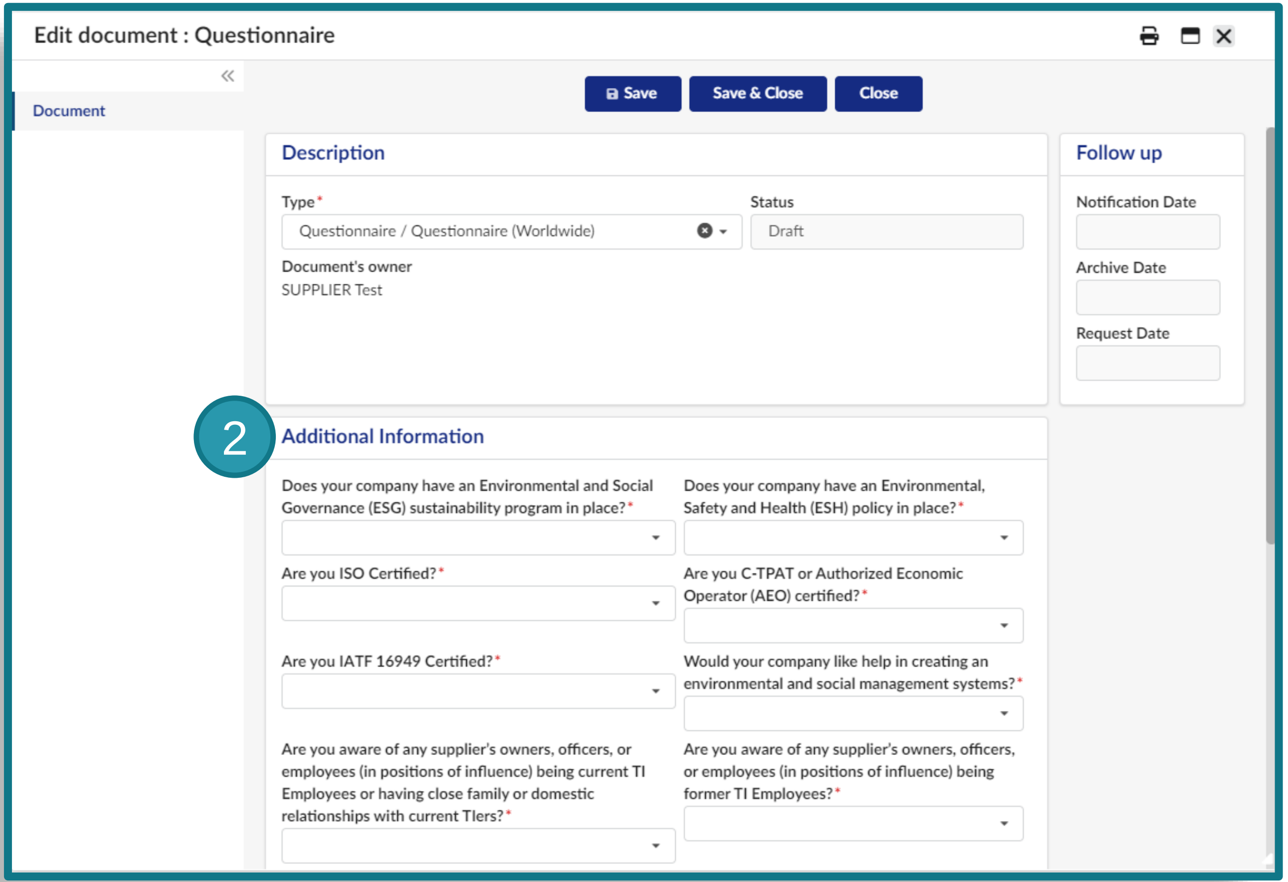


Submitting Questionnaires, cont.

Step 1: Click the '+' icon to open the questionnaire



- **Step 2:** Respond to all questions.

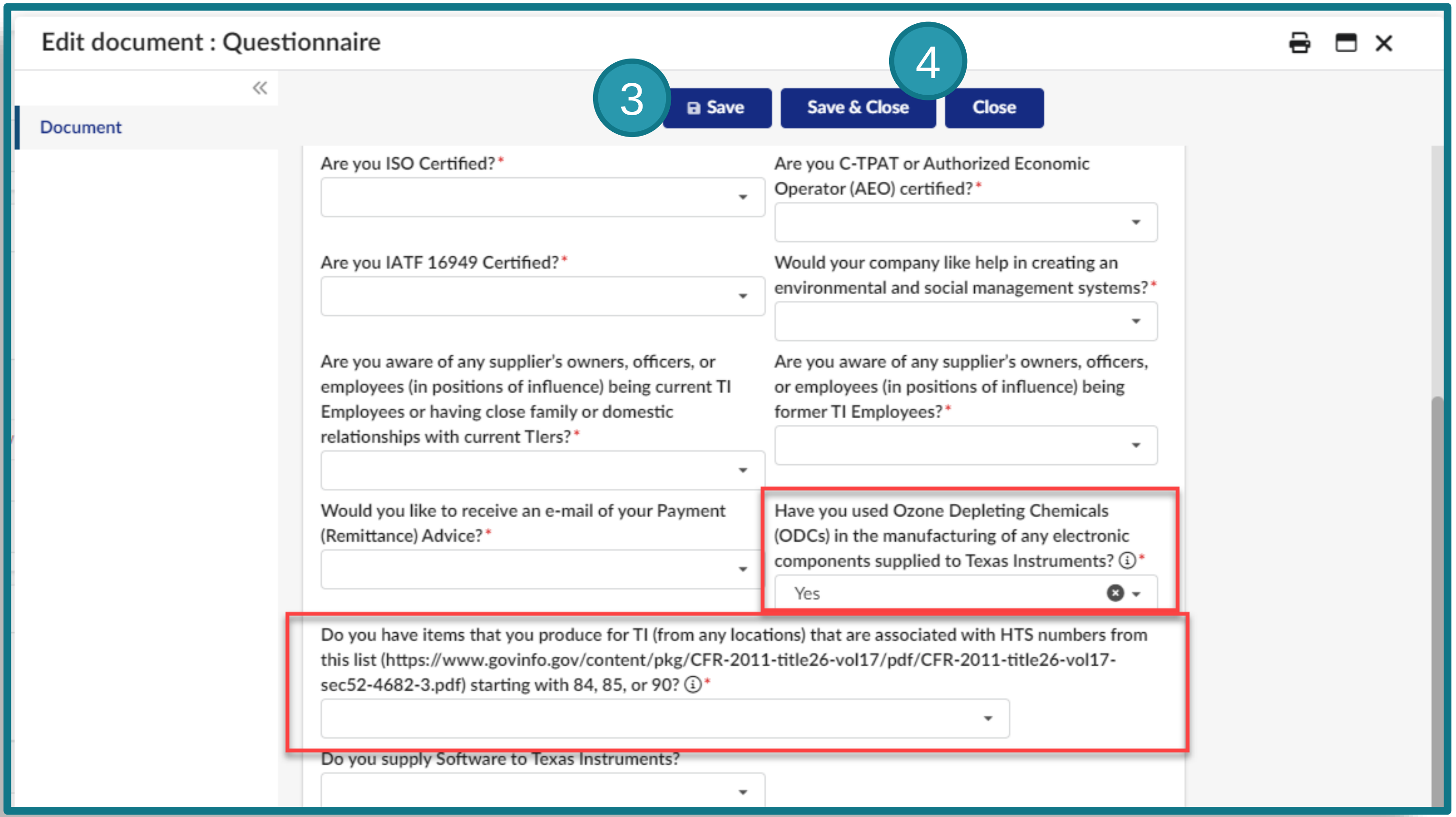


Submitting Questionnaires

- Important to note: If you answer Yes to the outlined question, you will need to review this document and respond to the 2nd outlined question.

Step 3: Click Save to save inputs and ensure no fields have been missed.

Step 4: Click Save & Close

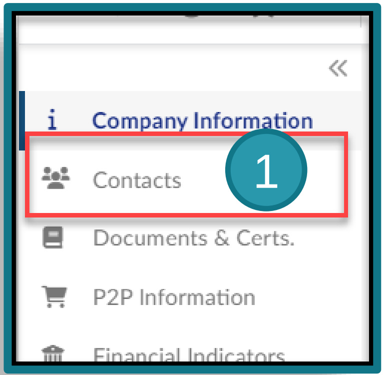


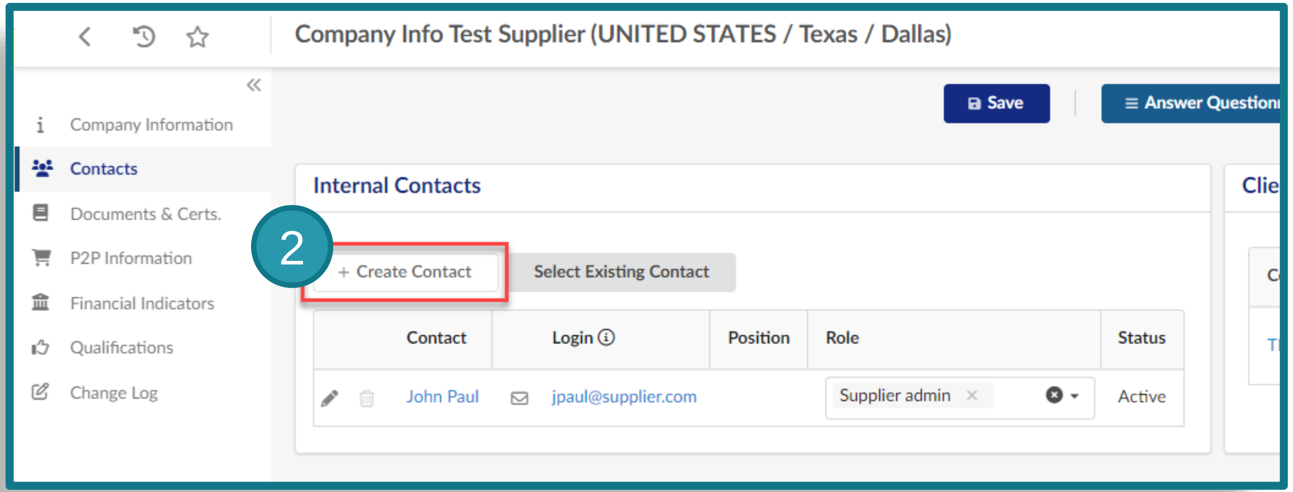
Create a New Contact

- Contacts should be maintained to ensure TI has an active party to reach out to when needed.
- Contacts for your company will be able to access the supplier portal and update critical information for your company. We recommend that you use an individuals' email address and not utilize email list so security reasons.

Step 1: Click the Contacts tab on the left side of the screen

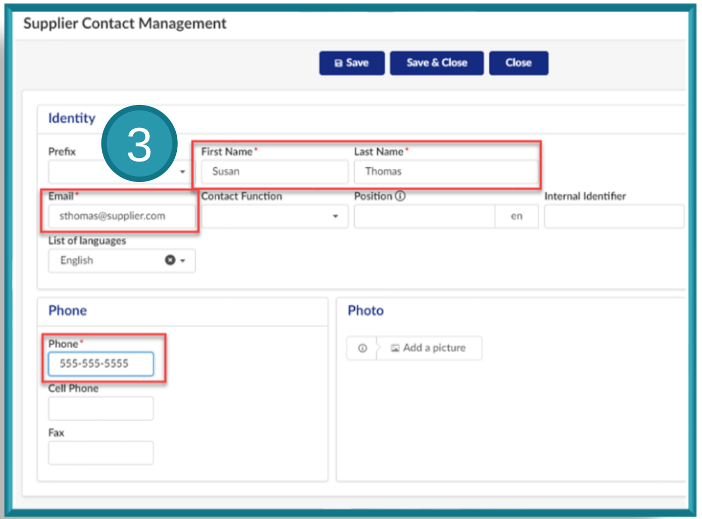
Step 2: Click Create Contact





Create a New Contact, cont.

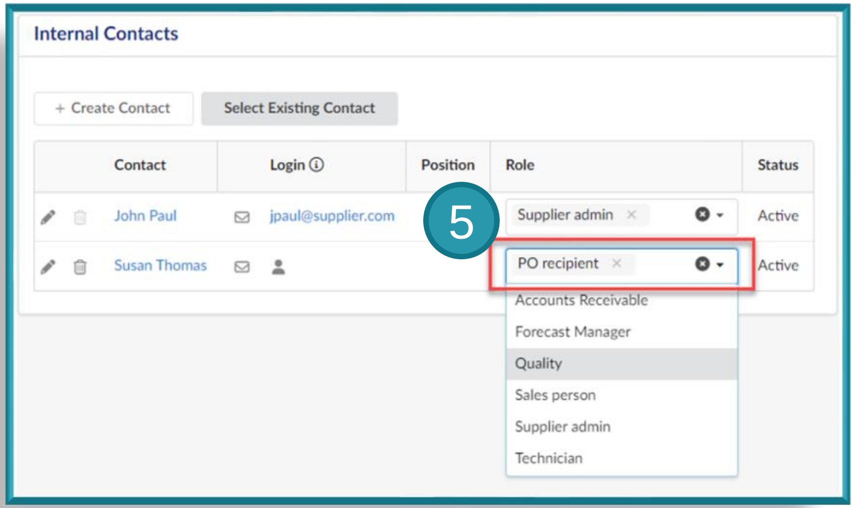
- **Step 3:** Enter the required details:
  - First Name
  - Last Name
  - Email
  - Phone



- **Step 4:** Click Save and Close

The Supplier Admin role should not be reassigned until that resource has been added as a contact and signed into the portal.

- **Step 5:** Select a Role for the contact (Only one contact can be assigned to each type)
  - PO Recipient – Required for order accounts to identify who will receive communications related to Purchase Orders
  - Accounts Receivable – Required for payment accounts to identify who will receive information related to payments
  - Other contacts are optional



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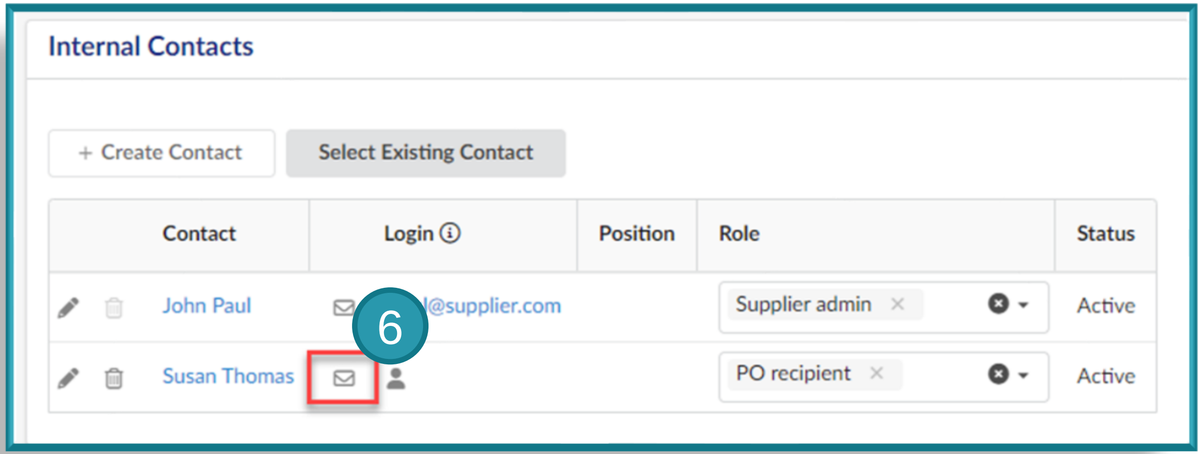
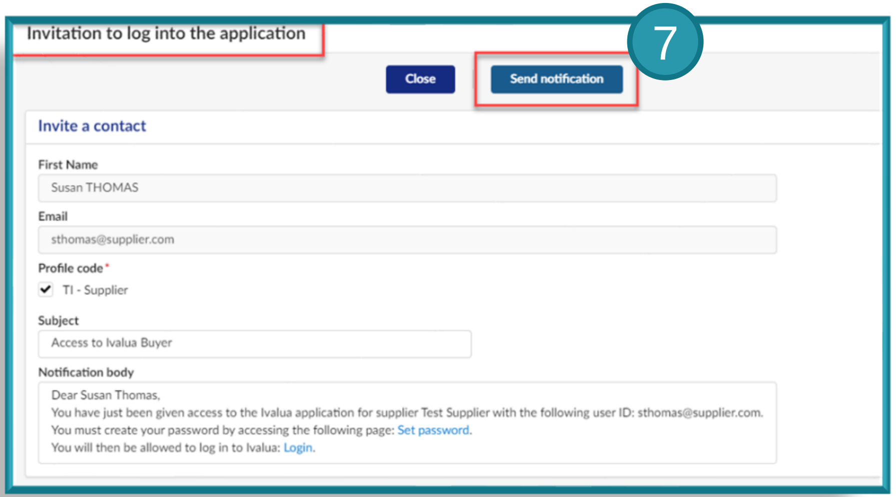
Create a New Contact, cont.

- After creating the contact and assigning a role, you must invite the contact to register.

Step 6: Click the envelope to send the registration invitation email to the additional contacts.



Step 7: On the Invitation to log into the application window, Click Send Notification

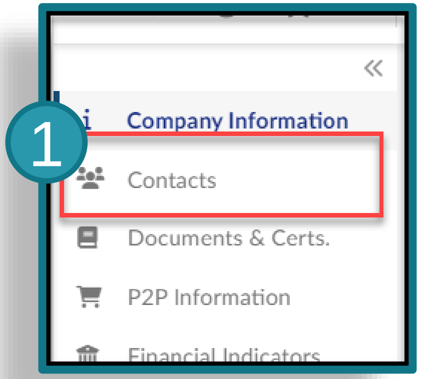


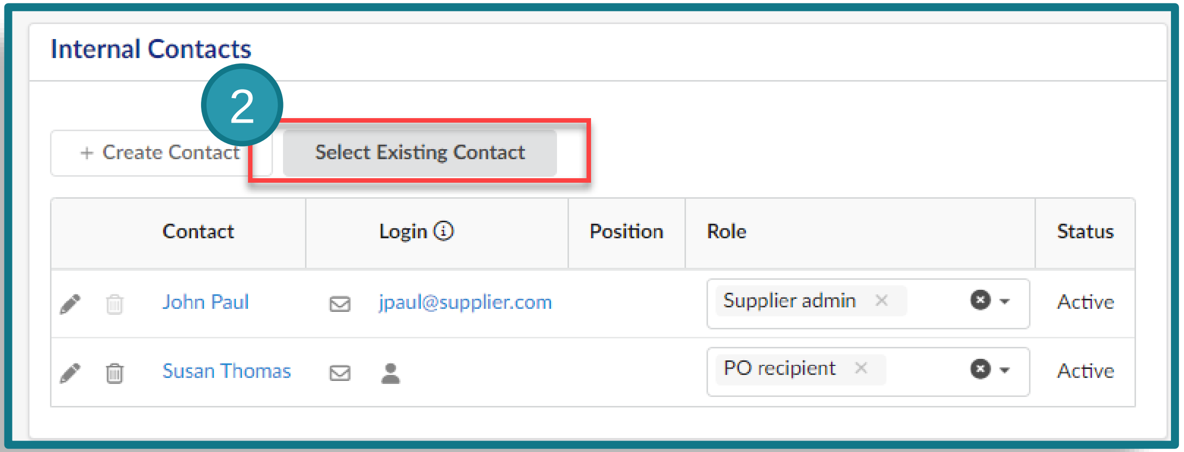
The contact will receive the email needed to create a password for their account.

Select Existing Contact

Step 1: Click the Contacts tab on the left side of the screen

Step 2: Click Create Contact

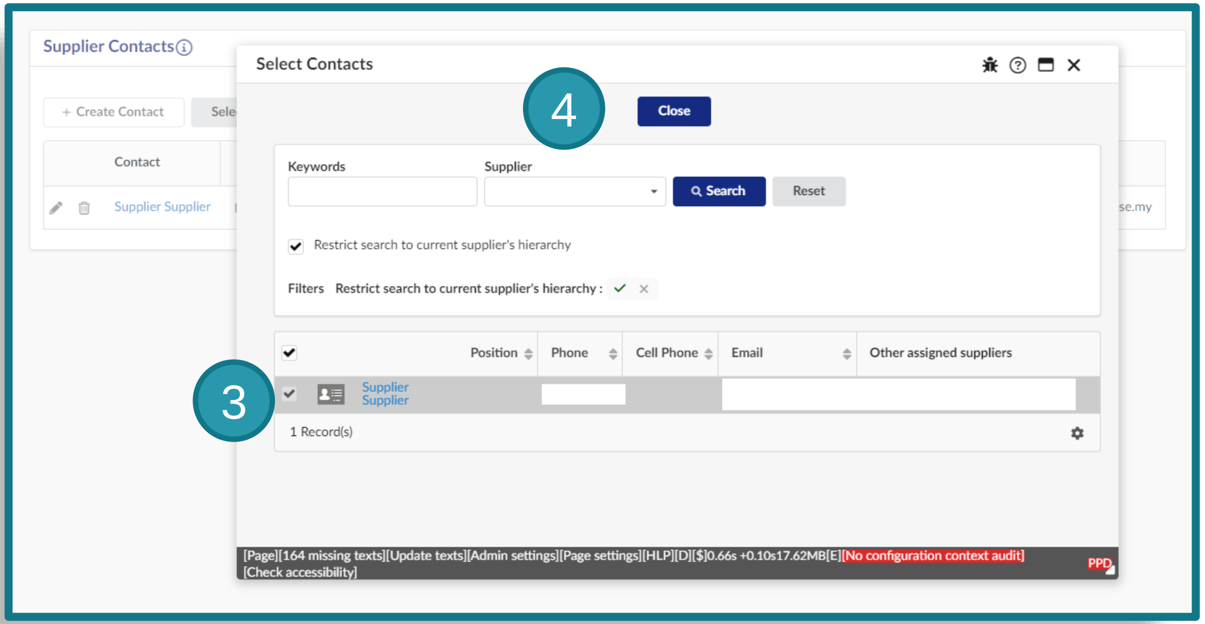




Select Existing Contact

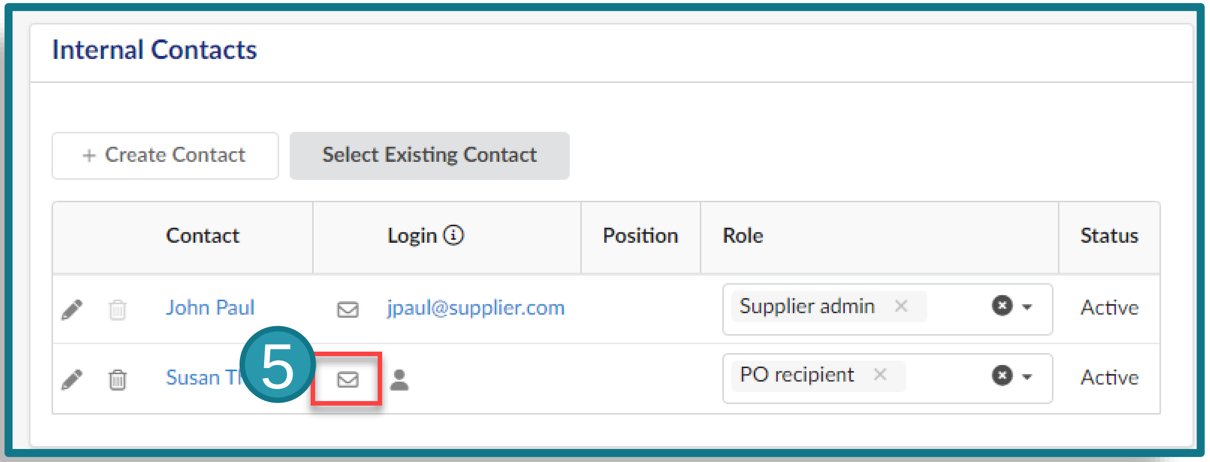
- A window will appear with a list of contact that are available for selection for your company.

- **Step 3:** Make a selection by clicking the checkbox next to the contact name.
- **Step 4:** Click Close

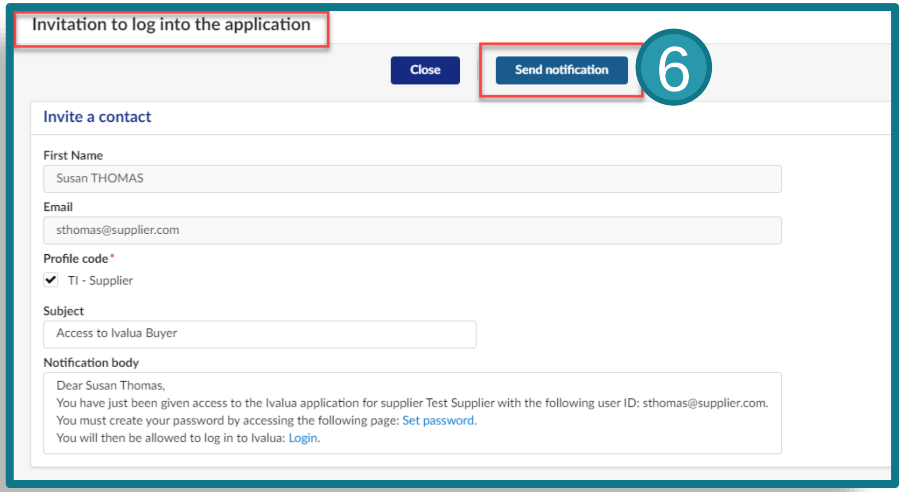


Select Existing Contact

Step 5: Click the envelope to send the registration invitation email to the additional contacts.



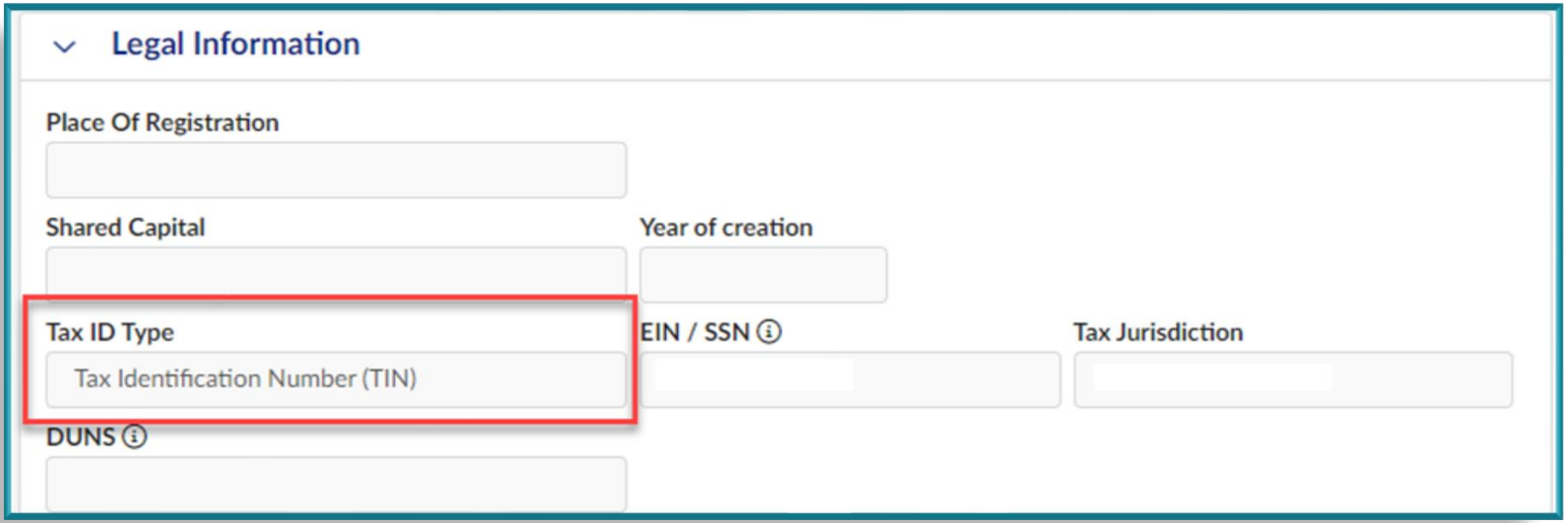
Step 6: On the Invitation to log into the application window, Click Send Notification



The contact will receive the email needed to create a password for their account.

Review Tax ID

- Check if tax ID/VAT ID field has been completed.
- If Tax information has not been completed, enter those details and Click Save.



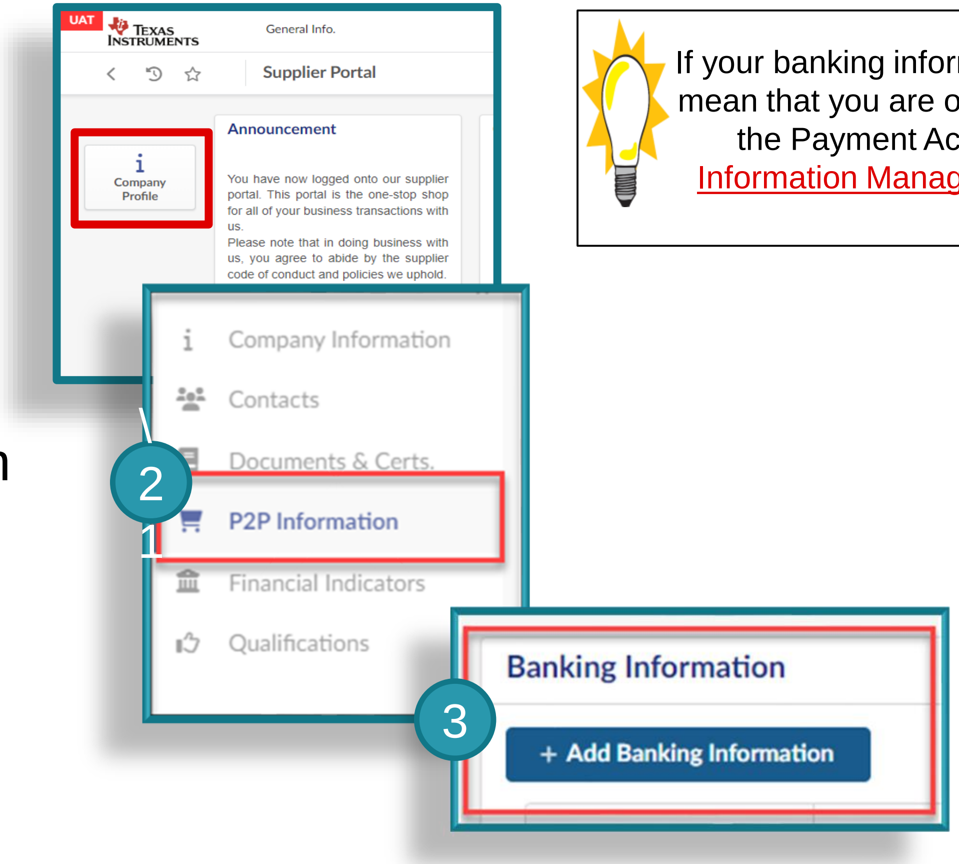
Add Banking Information

- Banking information is only applicable to payment accounts.
- Only one bank account can be linked to a payment account

Step 1: Click Company Profile

Step 2: Click P2P Information

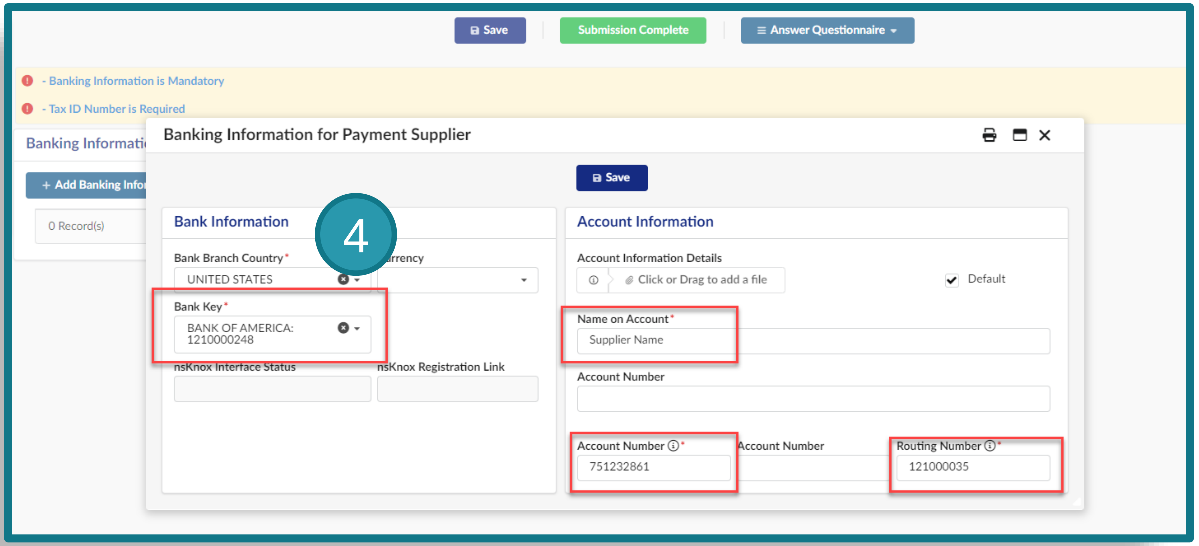
Step 3: Click Add Banking Information



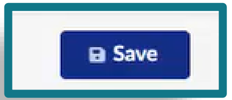
If your banking information is grayed out, it might mean that you are on the Order Account and not the Payment Account. See the Supplier Information Management (SIM) slide for more details.

Add Banking Information, cont.

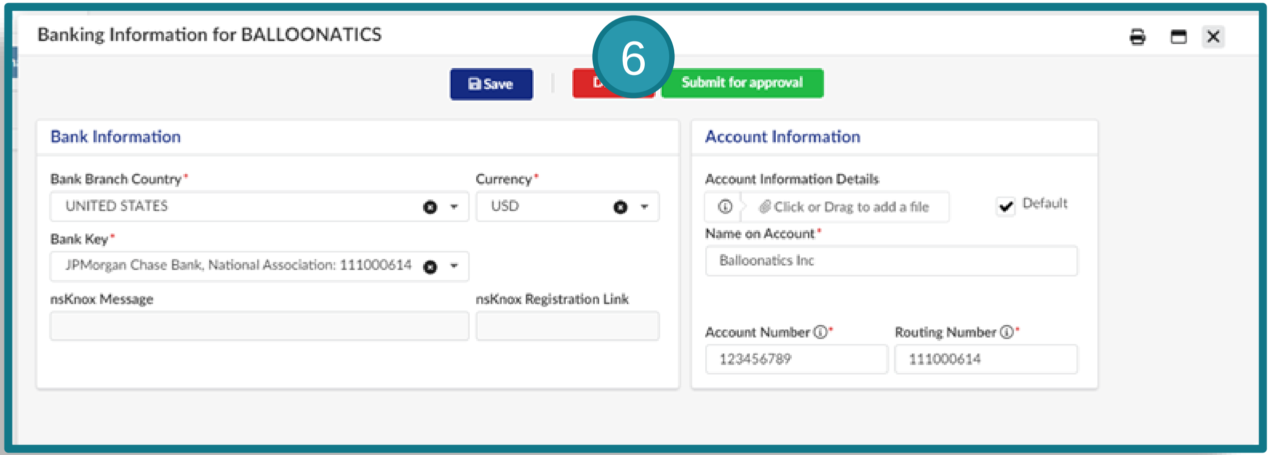
Step 4: Provide Banking Information



Step 5: Click Save



Step 6: Click Submit for Approval



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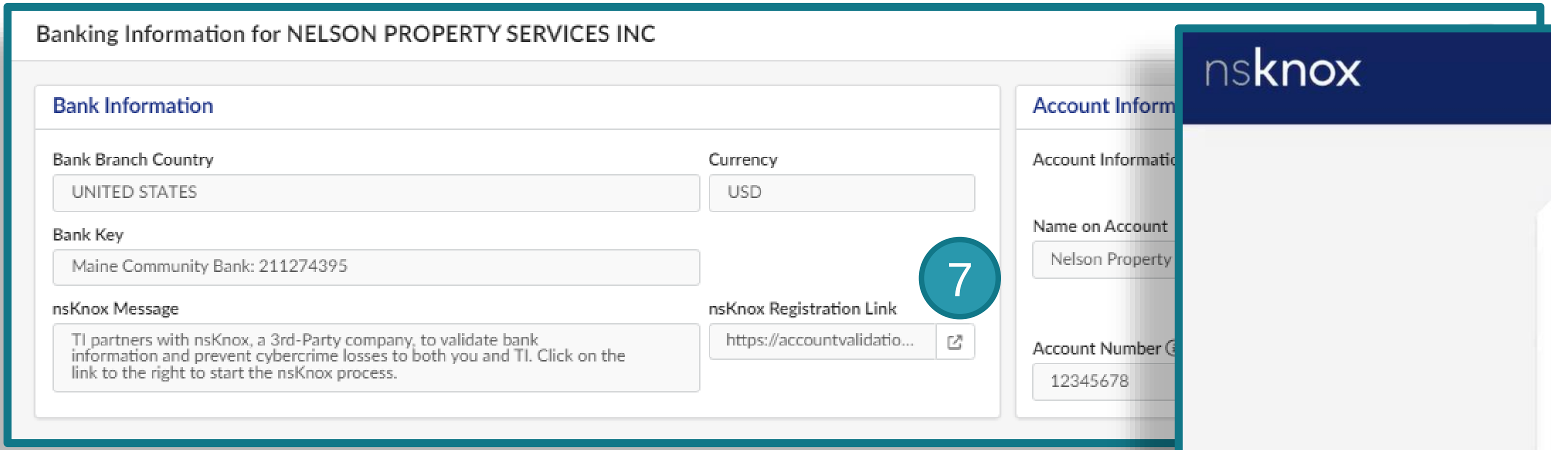
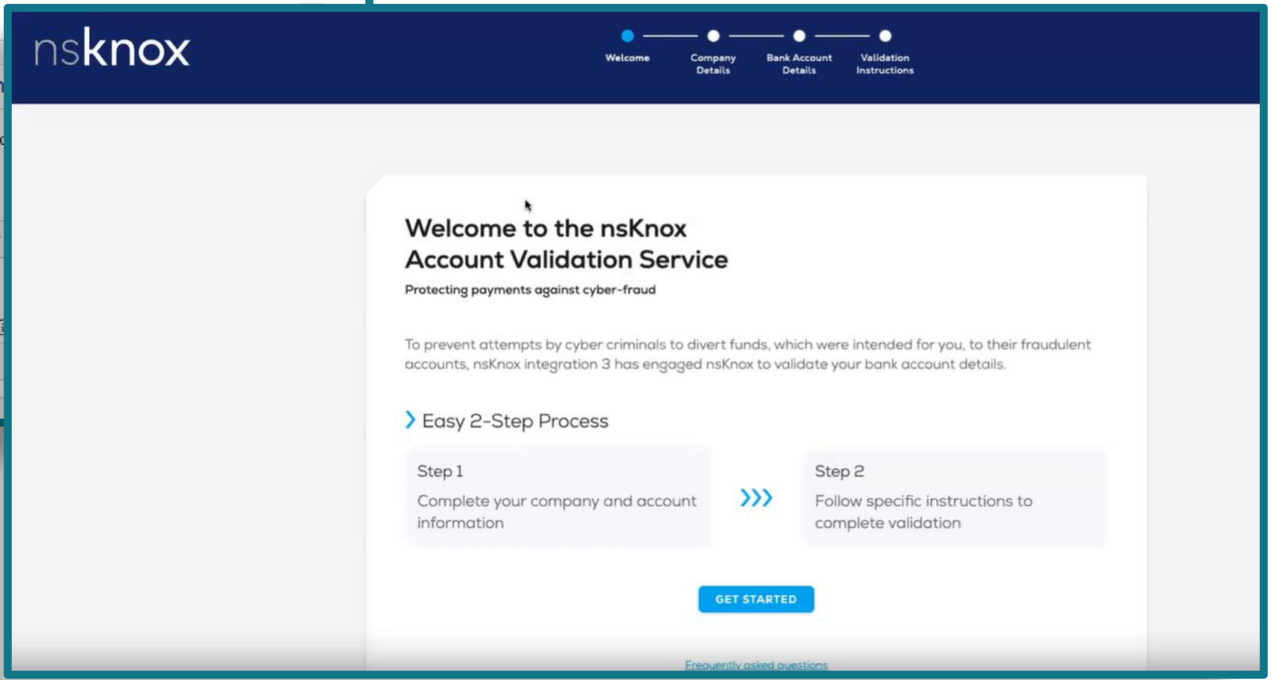
Add Banking Information, cont.

- **Step 7**: Click the link from nsKnox Registration Link field.

You will see this screen

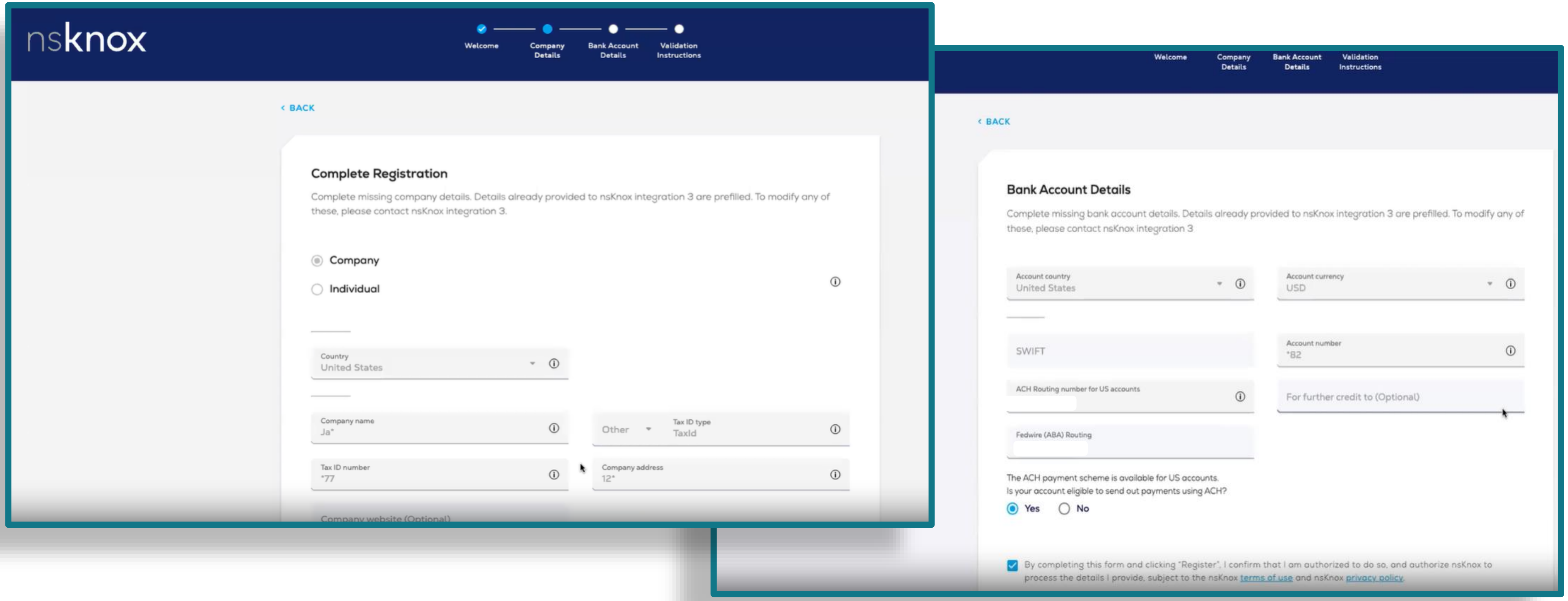




Note: If the nsKnox link is not generated, delete the existing bank information and click Save. Next, add tax ID and click on Save. Finally, add bank information again.

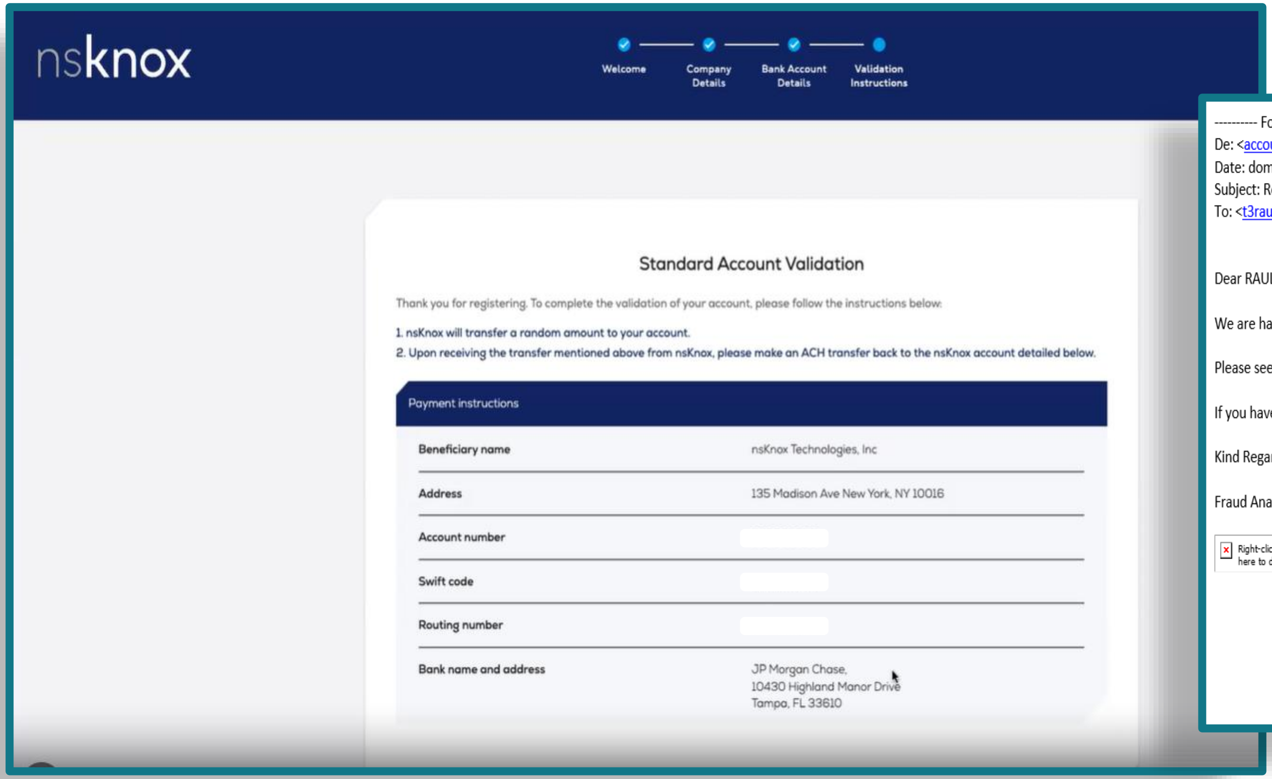
Add Banking Information, cont.

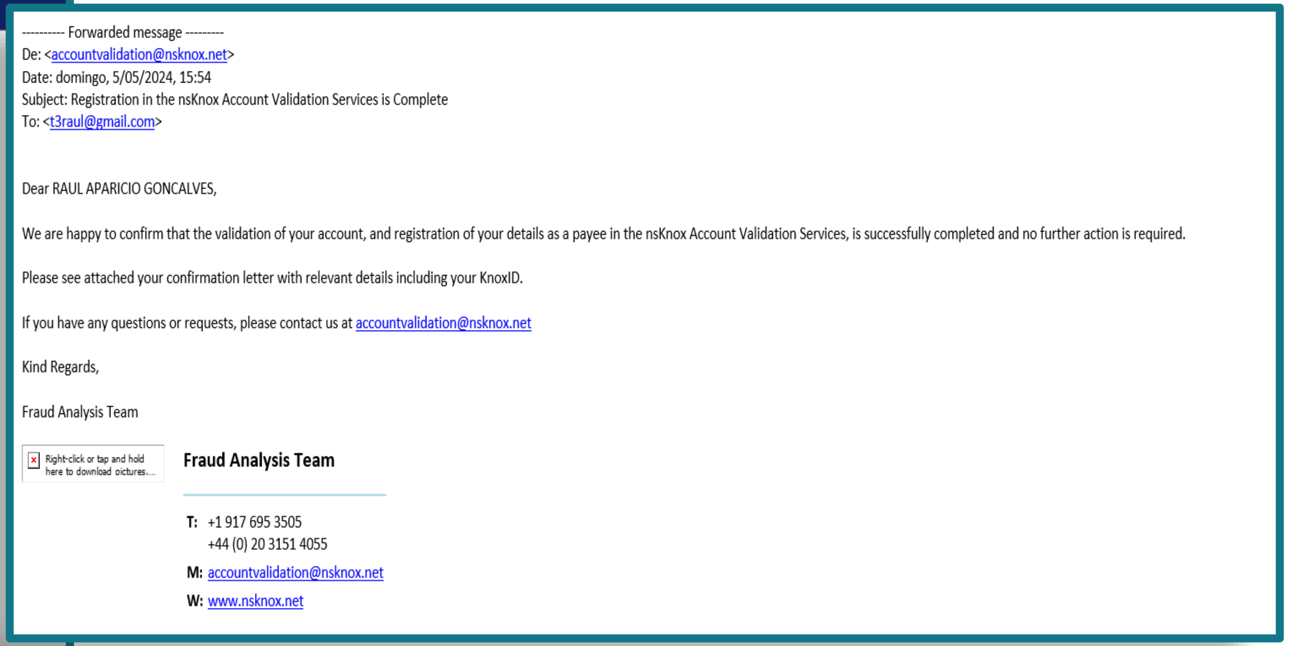
- After clicking the link from Ivalua, you can complete the registration process by reviewing the banking and company information that was carried over from Ivalua.
- Depending on the bank country, there could be additional fields to complete. Ensure that you review the form in its entirety before moving forward.



Add Banking Information, cont.

- Once you have completed the registration process you will see this confirmation screen. You will also receive a Welcome Letter from nsKnox that will also confirm your registration is complete.





---------- Forwarded message ---------
De: <accountvalidation@nsknox.net>
Date: domingo, 5/05/2024, 15:54
Subject: Registration in the nsKnox Account Validation Services is Complete
To: <t3raul@gmail.com>

Dear RAUL APARICIO GONCALVES,

We are happy to confirm that the validation of your account, and registration of your details as a payee in the nsKnox Account Validation Services, is successfully completed and no further action is required.

Please see attached your confirmation letter with relevant details including your KnoxID.

If you have any questions or requests, please contact us at accountvalidation@nsknox.net

Kind Regards,

Fraud Analysis Team

Right-click or tap and hold here to download pictures...

Fraud Analysis Team

T: +1 917 695 3505
+44 (0) 20 3151 4055
M: accountvalidation@nsknox.net
W: www.nsknox.net

Add Banking Information, cont.

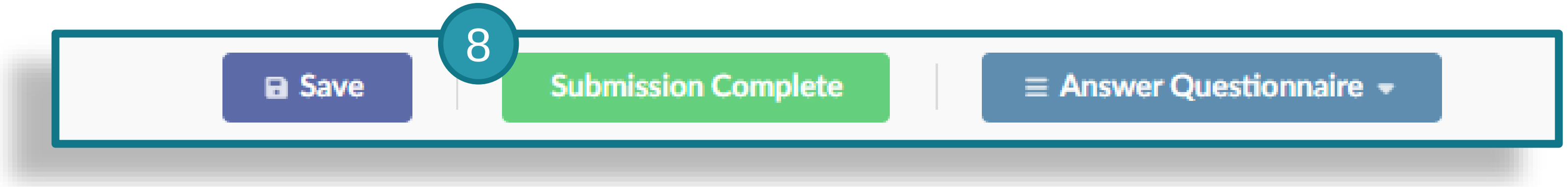
- Once registration is complete, it could take up to 48 hours for verification. Once validated, a confirmation will be received.
- that nsknox will verify if there is any action required, even if bank country is listed as exempt.
- If there is any mismatch of information provided, nsKnox will initiate the Global Wire validation.

	No action required	Planned	US, CA: ACH/EFT validation	EU: SEPA validation	Global: Wire validation
Payee	• UK • Poland • South Africa • Some US • India • China (CNY) • Japan (JPY) • Brazil • Mexico (MXN) • Chile (CLP) • Argentina (ARS) • Vietnam (VND) • Israel • France • Netherland • Italy • Indonesia	• South Korea • Sweden • Other	• PaymentKnox transfers a random amount • Payee returns same amount to nsKnox validation account over ACH/EFT	• Payee transfers 1 EUR to nsKnox validation account over SEPA	• Payee wires 10 USD or equivalent in any currency to nsKnox validation account

- nsKnox will transfer a random amount as part of the validation process. The process and amounts are based on Country as outlined below.

Add Banking Information, cont.

Step 8: Click Submission Complete



Supplier Self Service Maintenance

Maintaining your Data

Change Request vs New Account Setup

Change Request

- There are many types of changes that can be performed in Ivalua:
  - Company Name
  - Banking Data
  - Tax ID
  - Phone Number
  - Address
  - Contact
  - New Document or Certifications

New Account Setup

- However, if you need to change both your **company name** and **tax ID** you will need to setup a new account.
  - You must also request to deactivate the account that is no longer valid.
- If you submit this type of change request, you will be required to cancel the request and initiate the deactivation process.

Supplier Self Service Maintenance

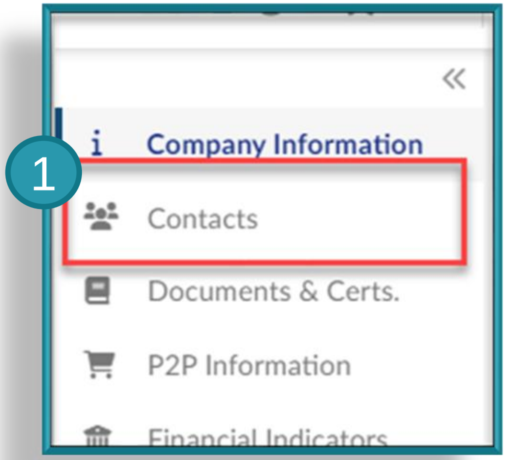
Contacts

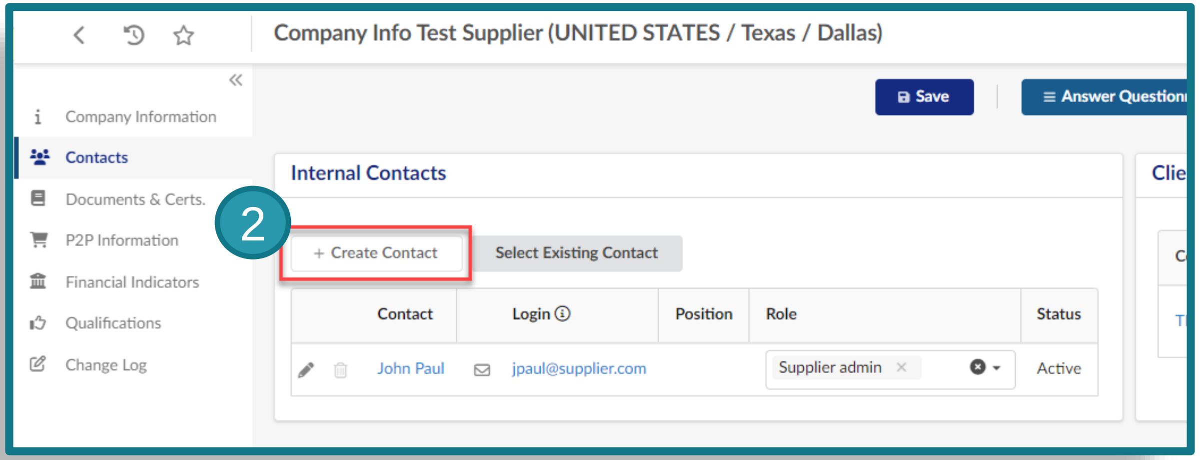
Create a New Contact

- Contacts should be maintained to ensure TI has an active party to reach out to when needed.

Step 1: Click the Contacts tab on the left side of the screen

Step 2: Click Create Contact

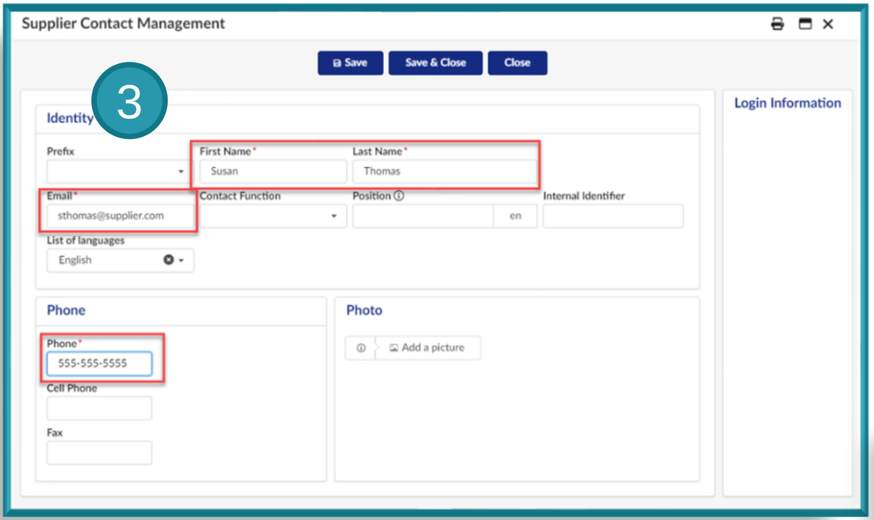




Note: If you initiate a change request, you may not have visibility to the Contacts tab.

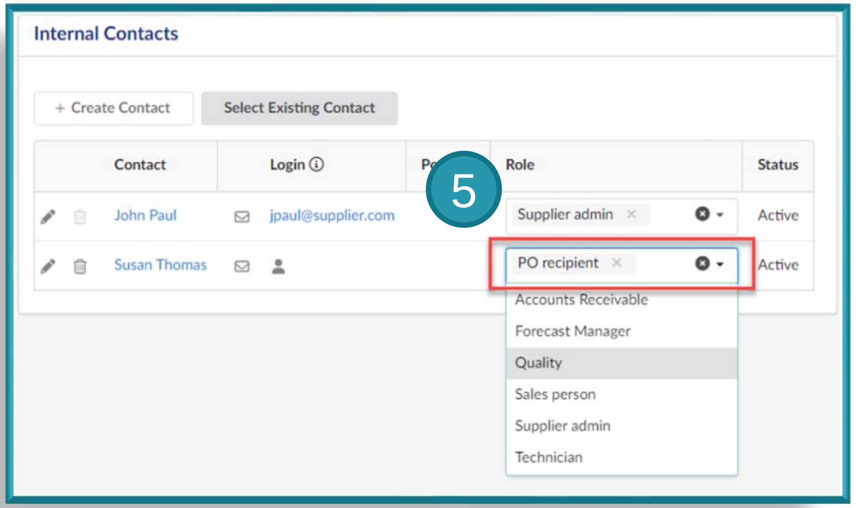
Create a New Contact, cont.

- **Step 3:** Enter the required details:
  – First Name
  – Last Name
  – Email
  – Phone



- **Step 4:** CLICK Save and Close

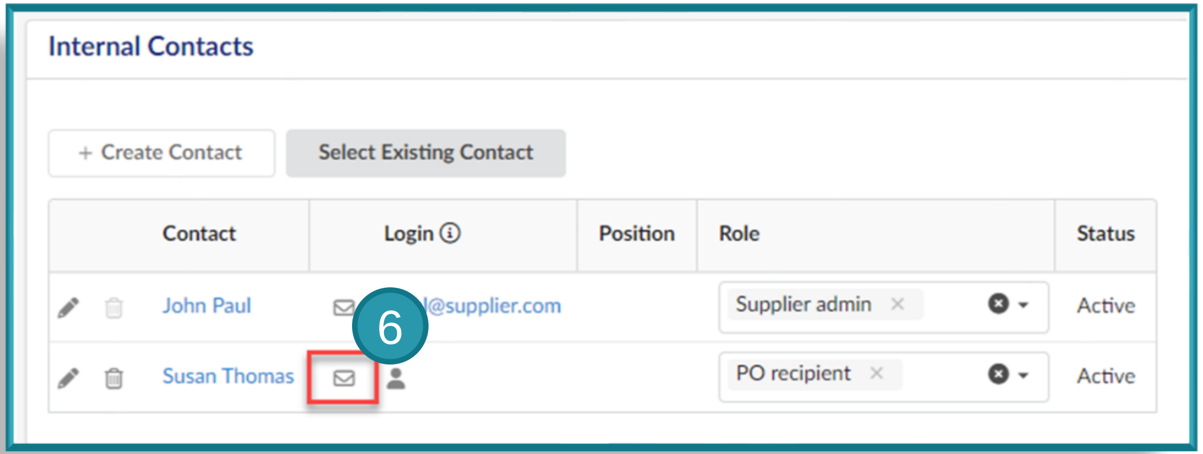
- **Step 5:** Select a Role for the contact
  - PO Recipient – Required for order accounts to identify who will receive communications related to Purchase Orders
  - Accounts Receivable – Required for payment accounts to identify who will receive information related to payments
  - Other contacts are optional



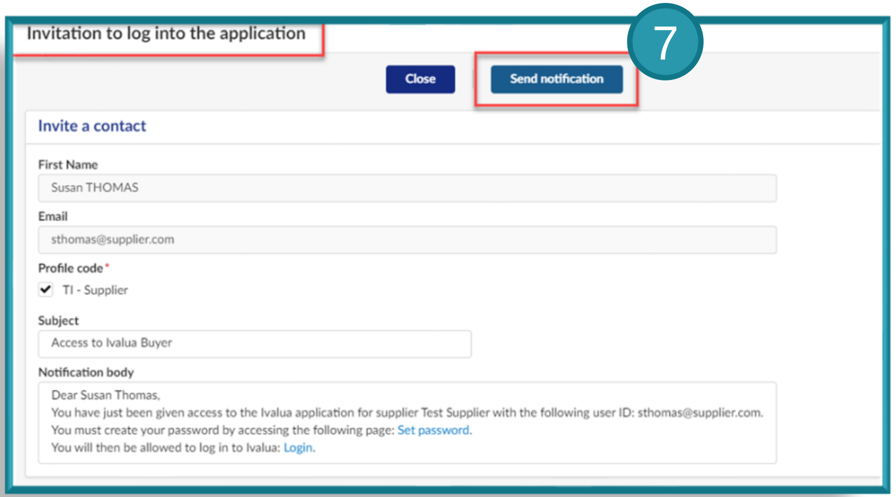
Create a New Contact, cont.

- After creating the contact and assigning a role, you must invite the contact to register.

Step 6: Click the envelope to send the registration invitation email to the additional contacts.



Step 7: On the Invitation to log into the application window, Click Send Notification

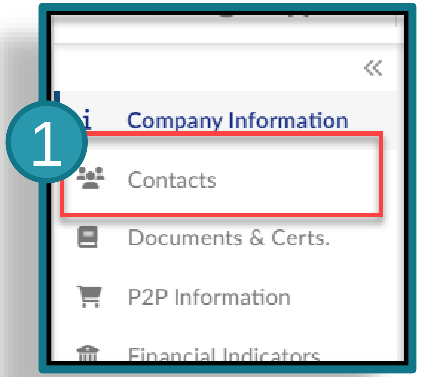


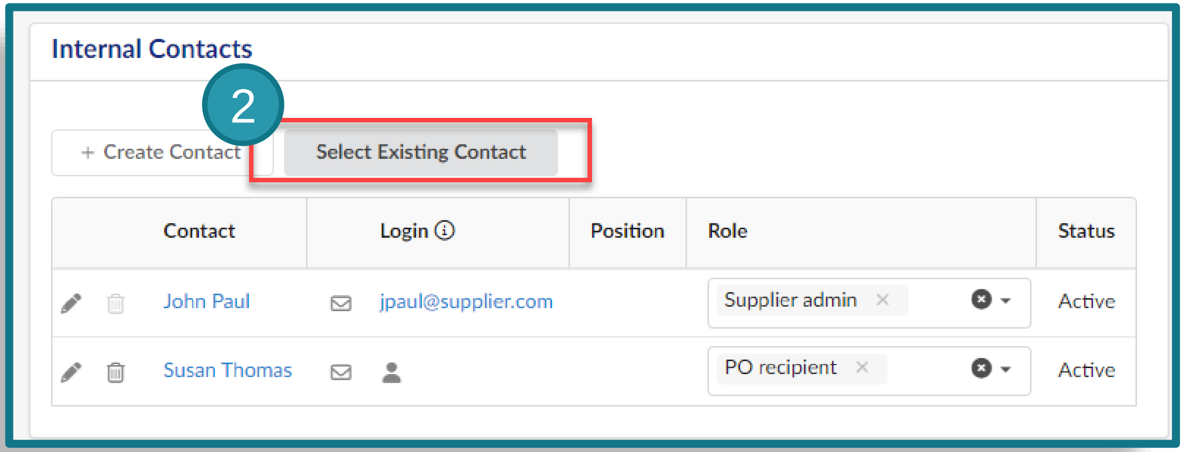
The contact will receive the email needed to create a password for their account.

Select Existing Contact

Step 1: Click the Contacts tab on the left side of the screen

Step 2: Click Select Existing Contact





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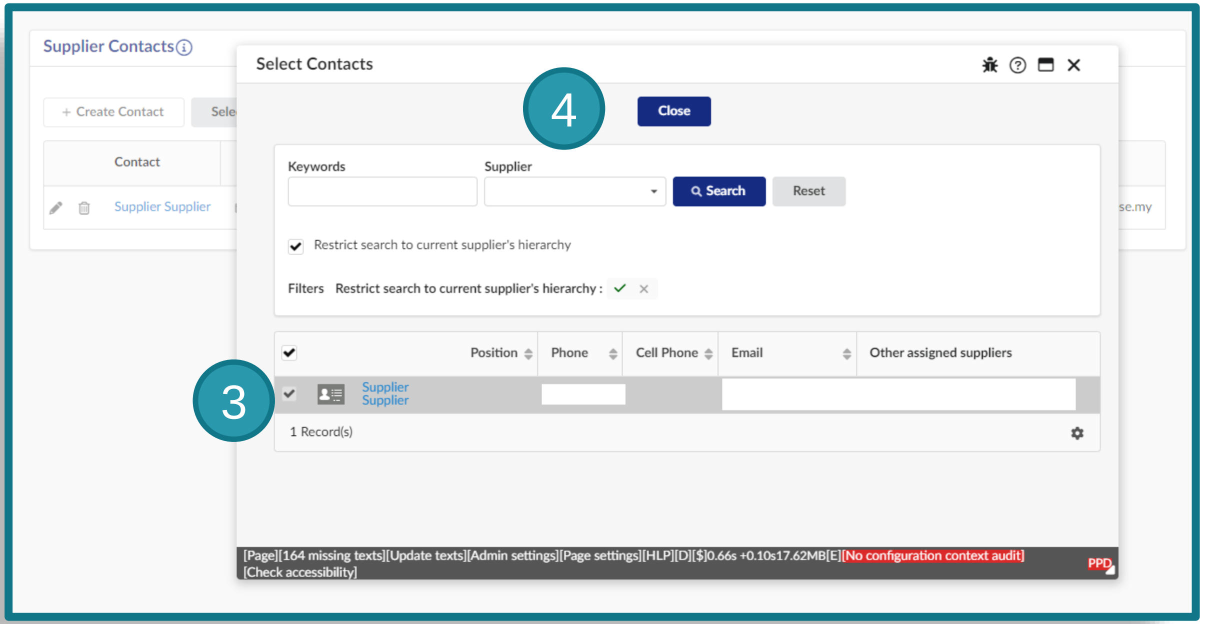
Select Existing Contact

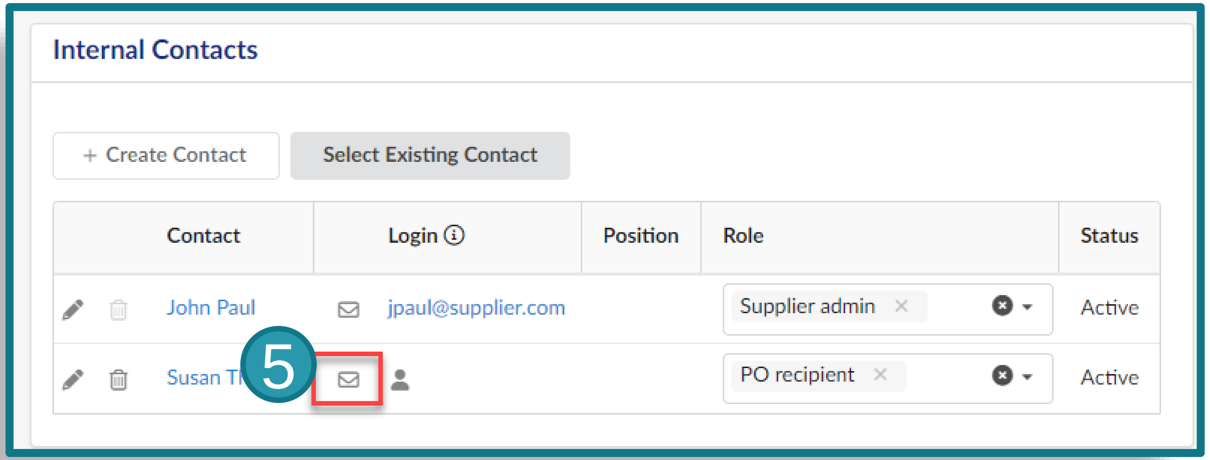
- A window will appear with a list of contact that are available for selection for your company.

- **Step 3:** Make a selection by clicking the checkbox next to the contact name.
- **Step 4:** Click Close

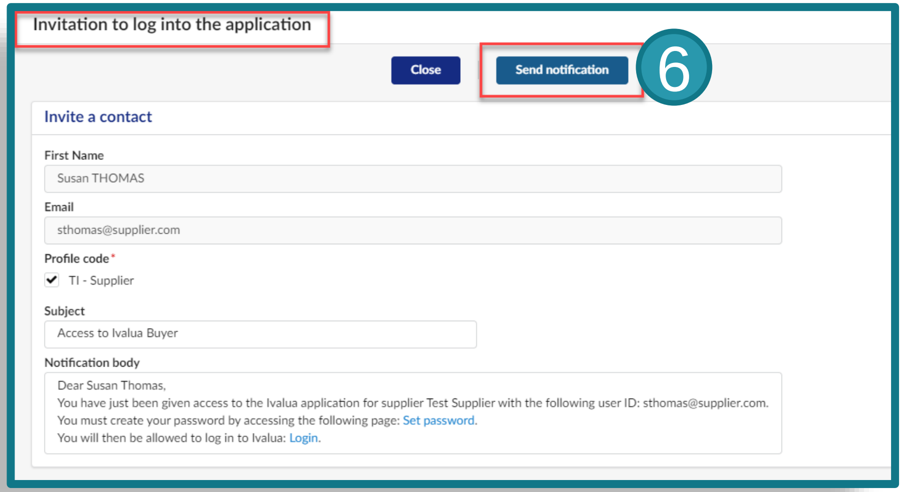


Select Existing Contact

Step 5: Click the envelope to send the registration invitation email to the additional contacts.



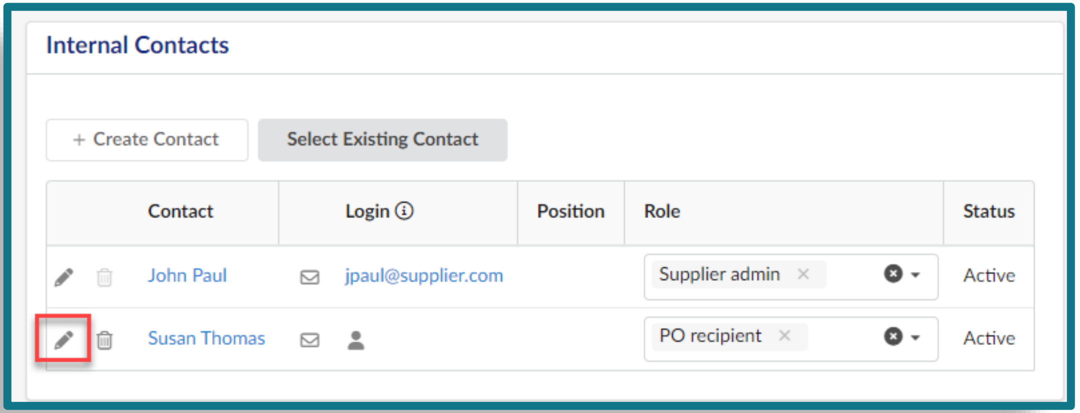
Step 6: On the Invitation to log into the application window, Click Send Notification



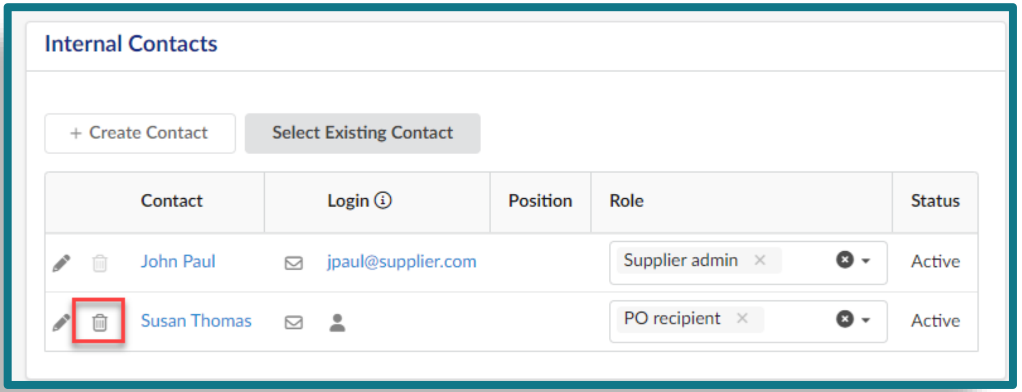
The contact will receive the email needed to create a password for their account.

Edit or Delete a Contact

- To Edit an existing contact, Click Edit (Pencil Icon)
  - Examples of changes would be last name, email or phone number



- To Delete a contact Click Delete (Trash Can Icon)



Supplier Self Service Maintenance

Company Information Changes

Company Information Change

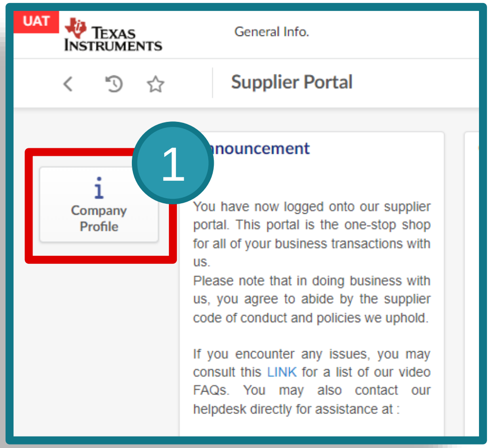
- Types of Information Changes:
  - Company Name
  - Address
  - Tax ID/SSN
  - Minority Business Indicator
  - Doing Business As (DBA) Information

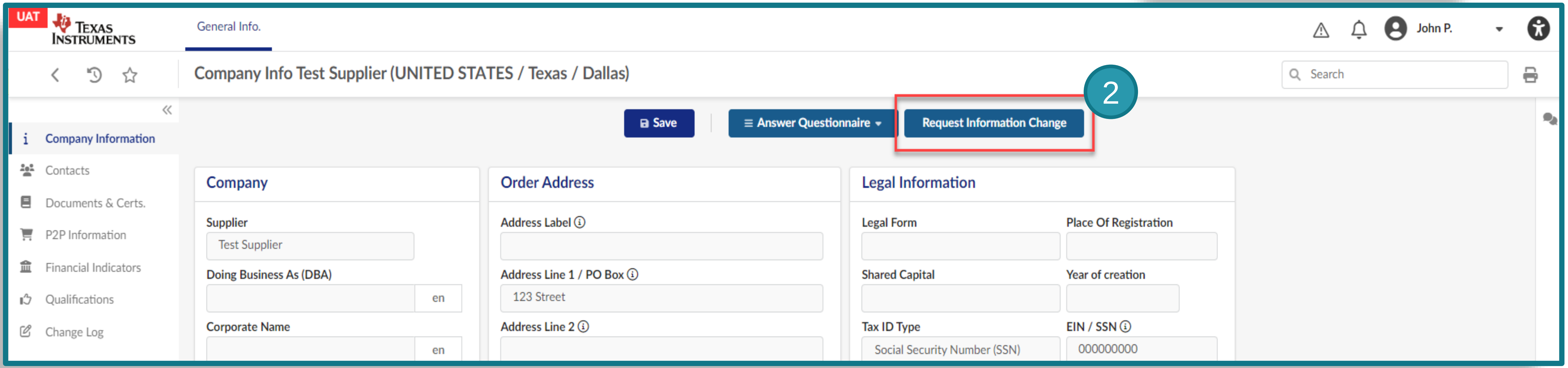
- This portion of the training will talk through 2 examples of Information Change Request: Address Change and Tax ID Change

Address Change

Step 1: Click Company Profile from the Supplier Portal home page.

Step 2: Click Request Information Change



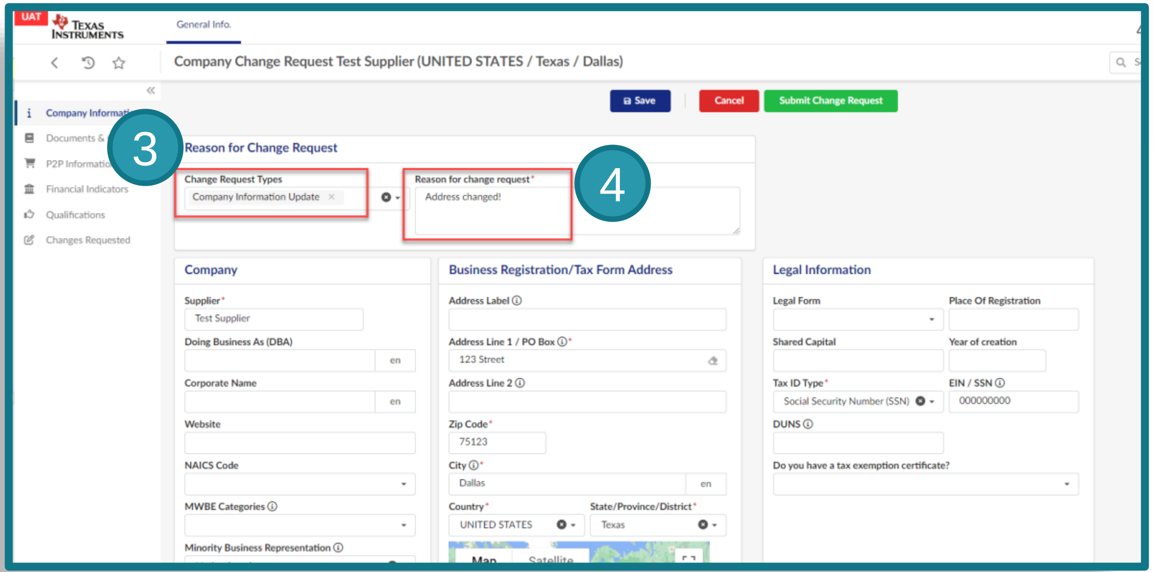


Address Change, cont.

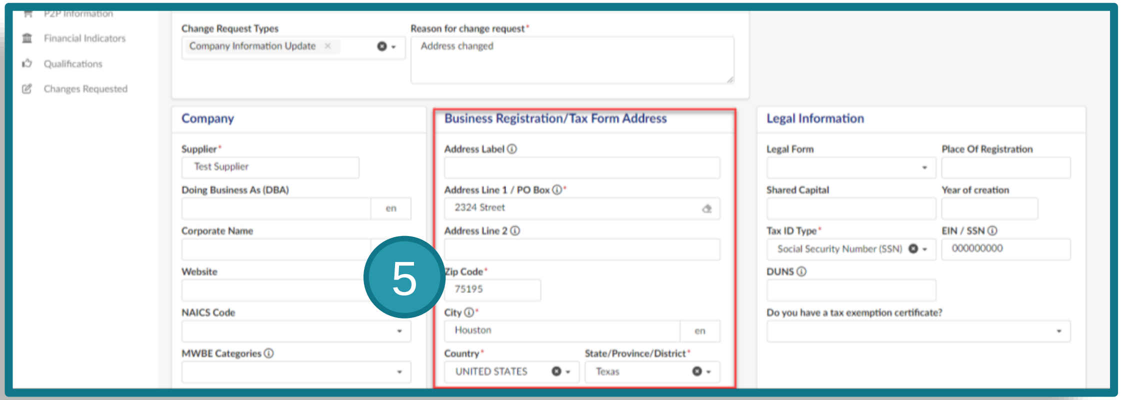
Step 3: Select a Change Request Type

- Change Request Type is used for reporting purposes only. It will not drive any functionality in the system.

Step 4: Enter a Reason for change request. This should include what changes were made and justification for that change.



Step 5: Update address



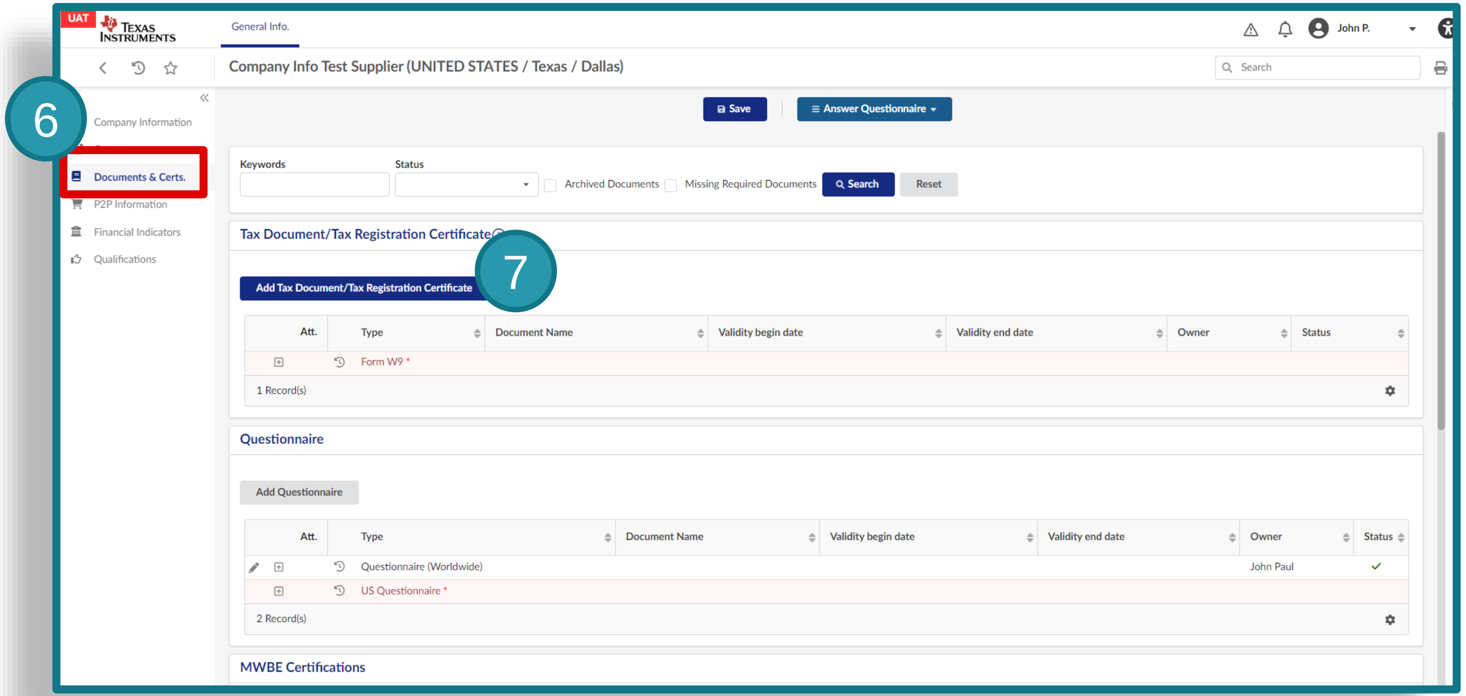
Address Change, cont.

Once you address information has been updated:

Step 6: Click the Documents & Certs tab

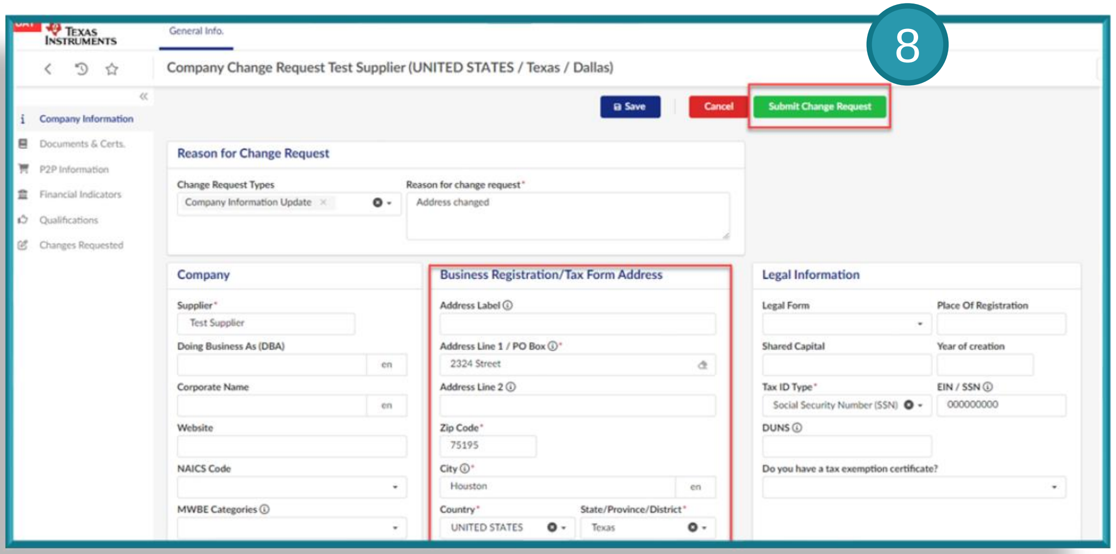
Step 7: Provide updated business registration and Tax documents

If you have questions about what information is required, please use conversations to reach your contact at TI.



Address Change, cont.

Step 8: Click Submit Change Request

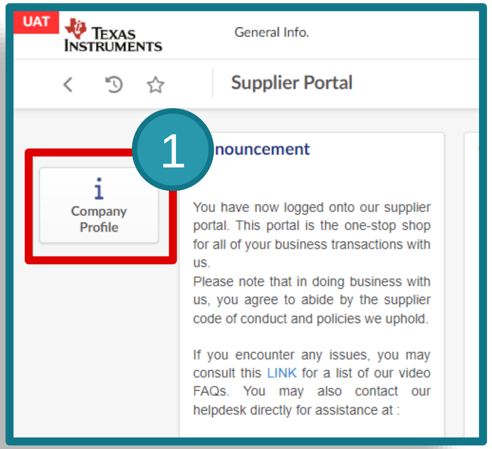


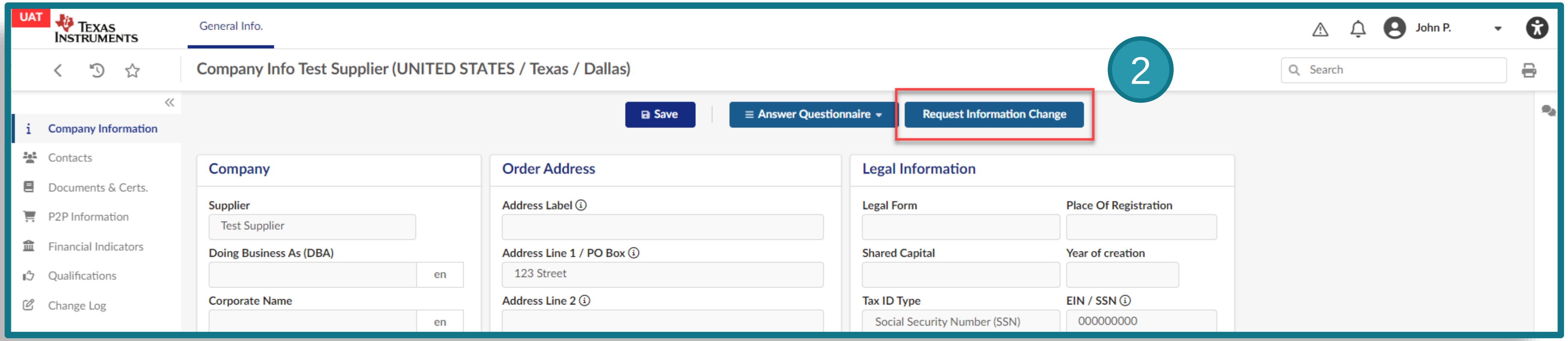
Once your request is submitted, TI will review and approve/reject this change request. Any additional information will be shared using Conversations.

Tax ID Change

Step 1: Click Company Profile from the Supplier Portal home page.

Step 2: Click Request Information Change



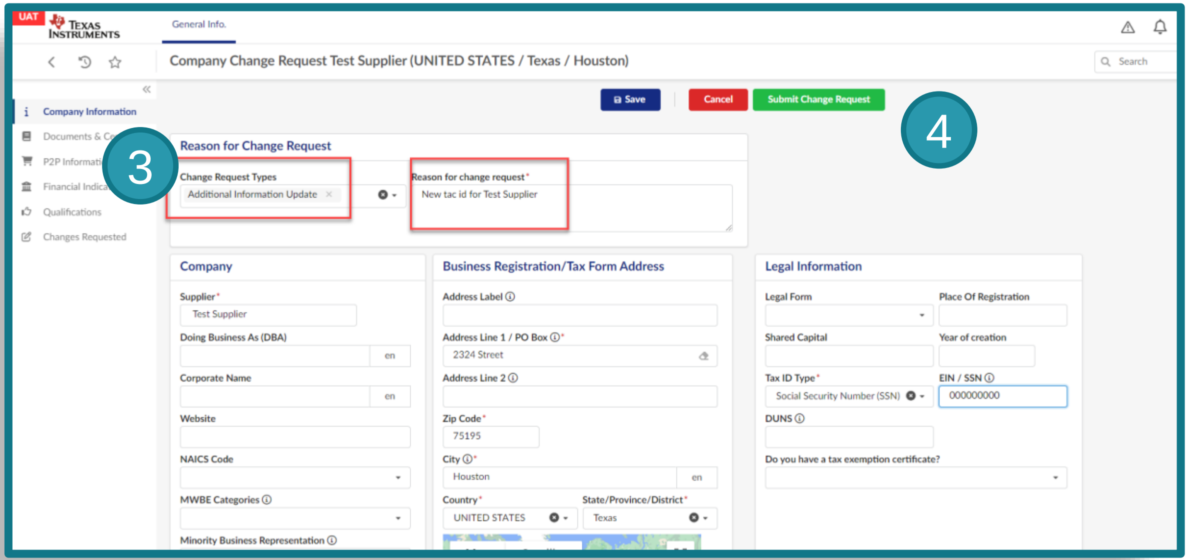


Tax ID Change, cont.

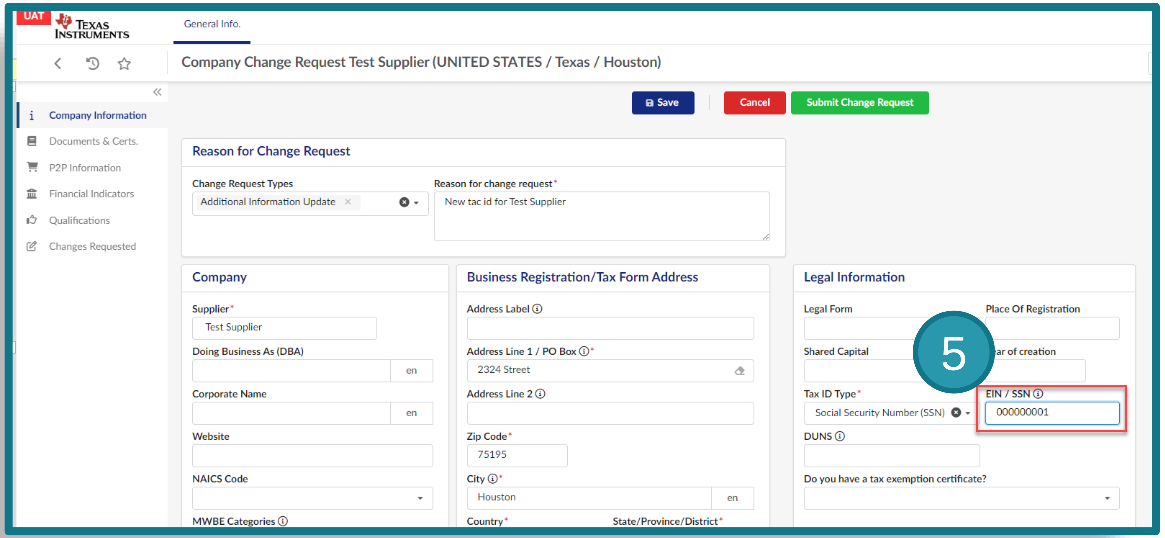
Step 3: Select a Change Request Type

– Change Request Type is used for reporting purposes only. It will not drive any functionality in the system.

Step 4: Enter a Reason for change request



Step 5: Update Tax ID



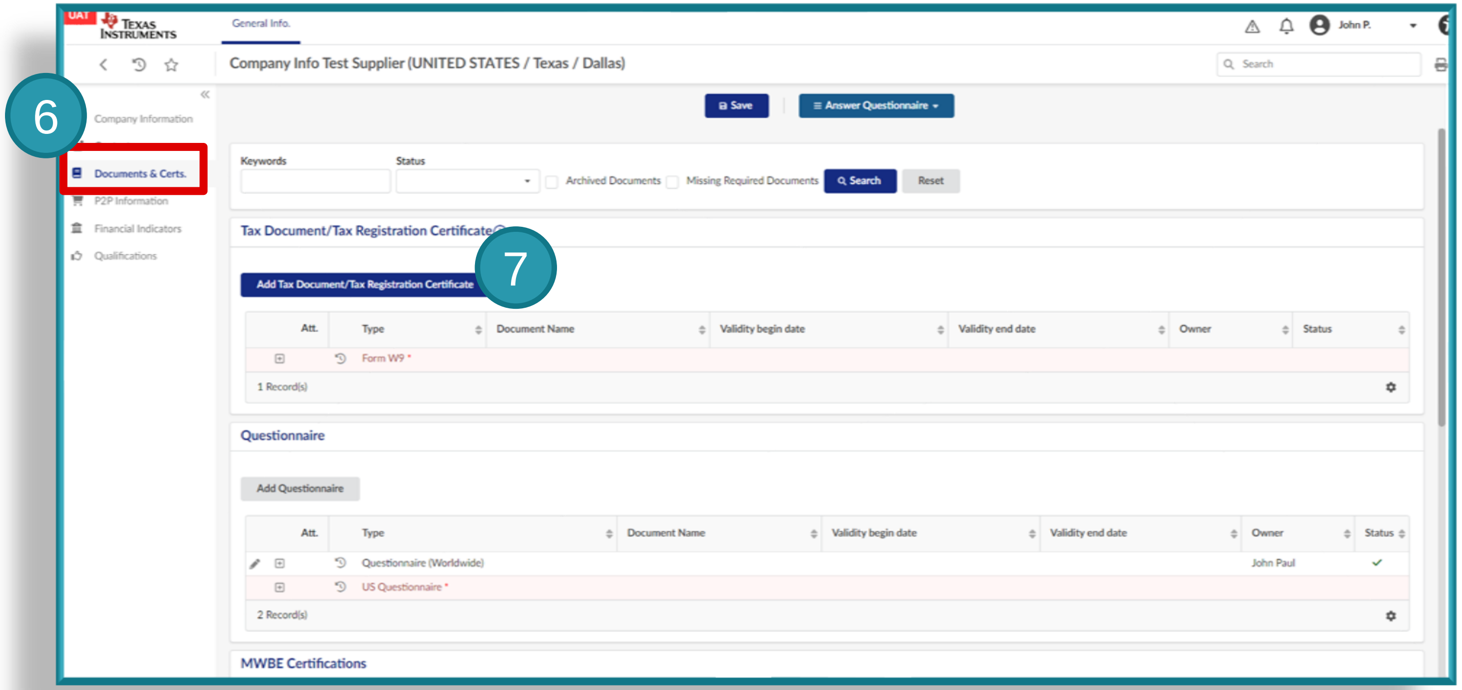
Tax ID Change, cont.

Once you address information has been updated:

Step 6: Click the Documents & Certs tab

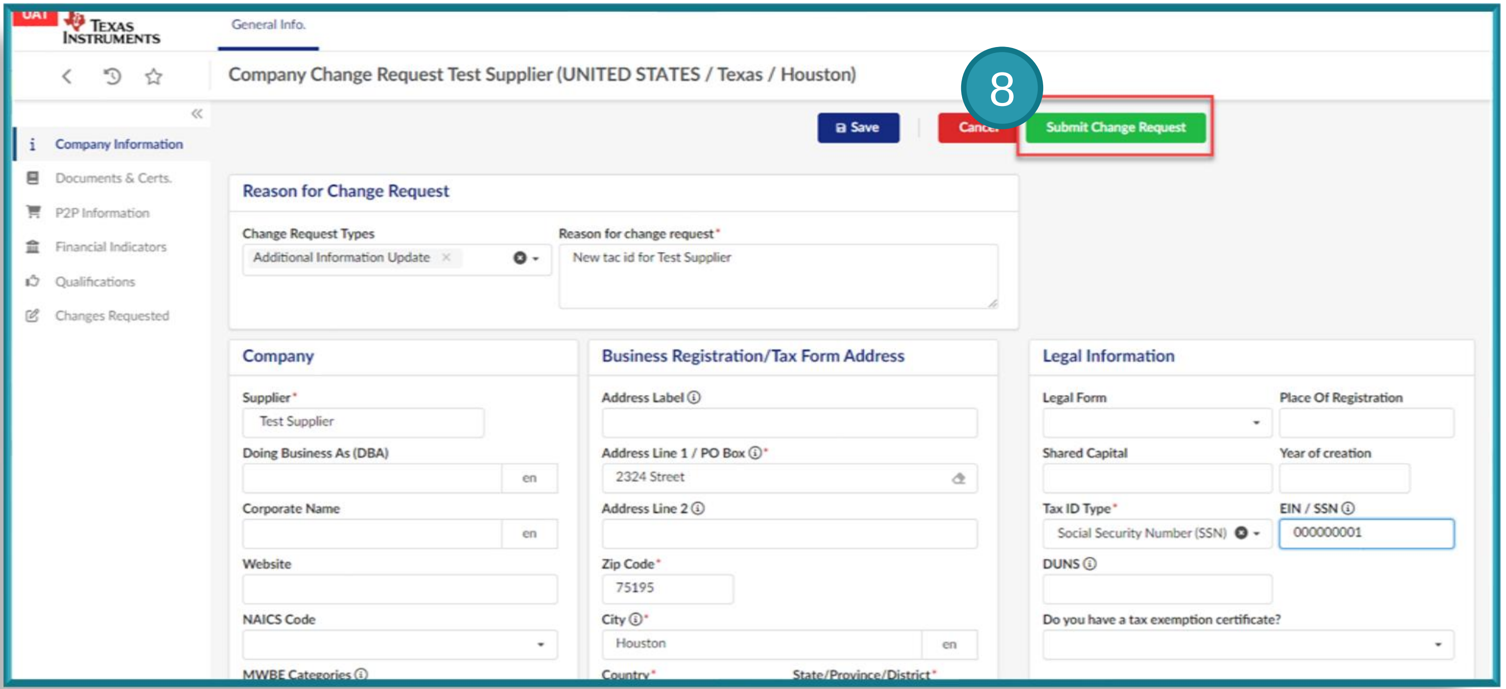
Step 7: Provide new Tax documents

If you have questions about what information is required, please use conversations to reach your contact at TI.



Tax ID Change, cont.

- **Step 8:** Click Submit Change Request



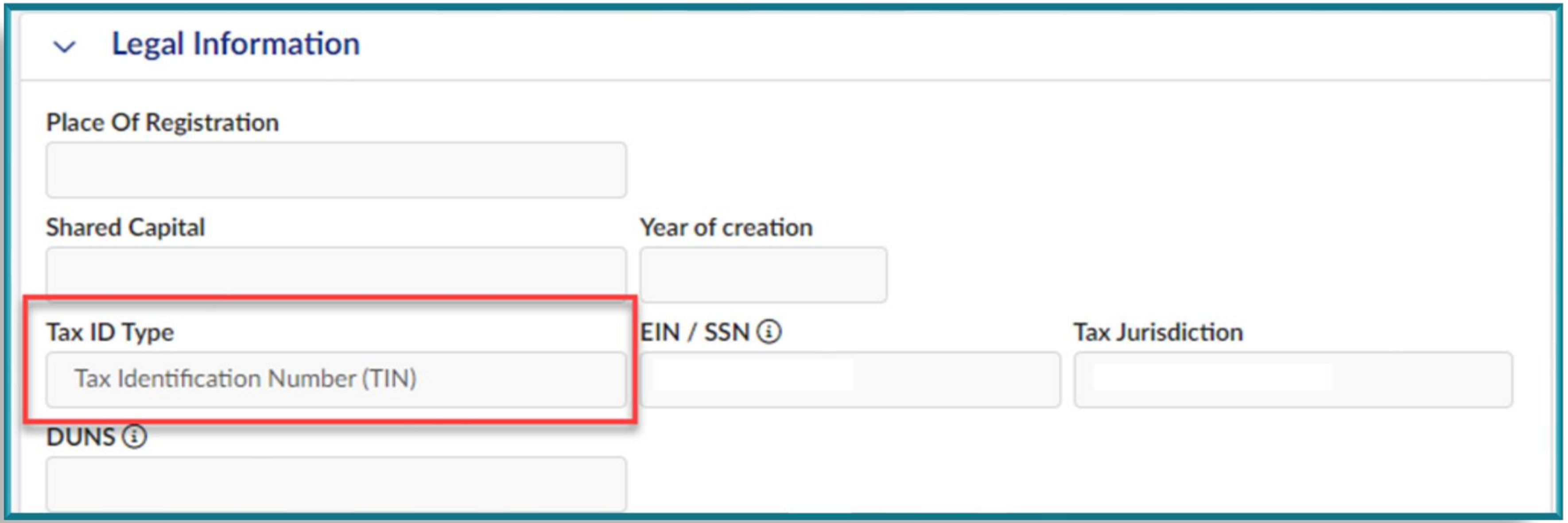
Once your request is submitted, TI will review and determine what new tax documents must be provided. This information will be shared using Conversations.

Supplier Self Service Maintenance

Banking Information

Review Tax ID

- Check if tax ID/VAT ID field has been completed.
- If Tax information has not been completed, enter those details and click Save.

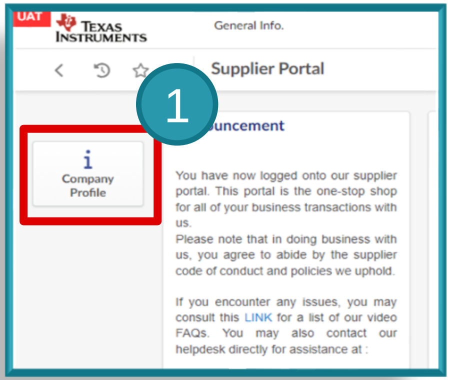


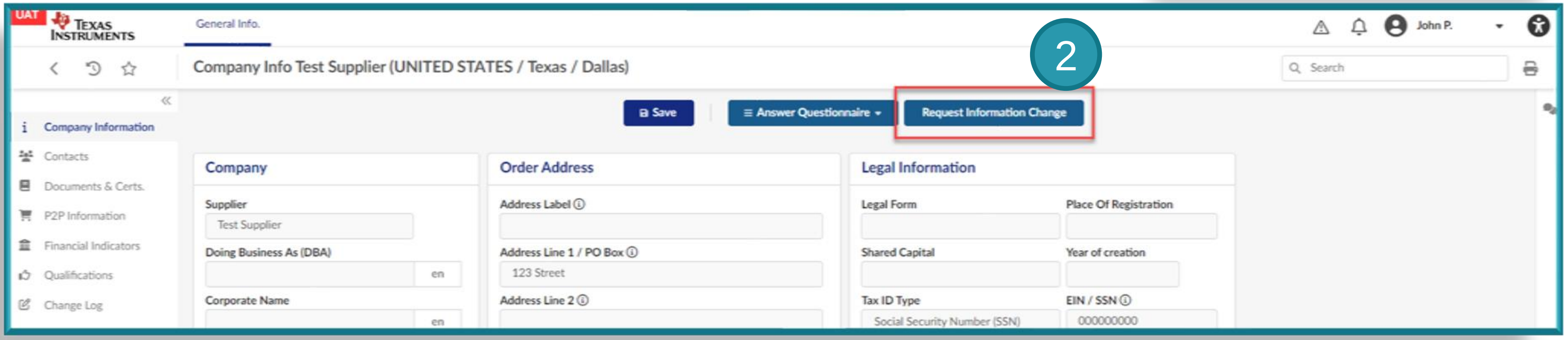
Update Banking Information

- Banking information is only applicable to payment accounts.
- Only one bank account can be linked to a payment account
- To initiate a banking information change, you must first delete the existing banking information.

Step 1: Click Company Profile

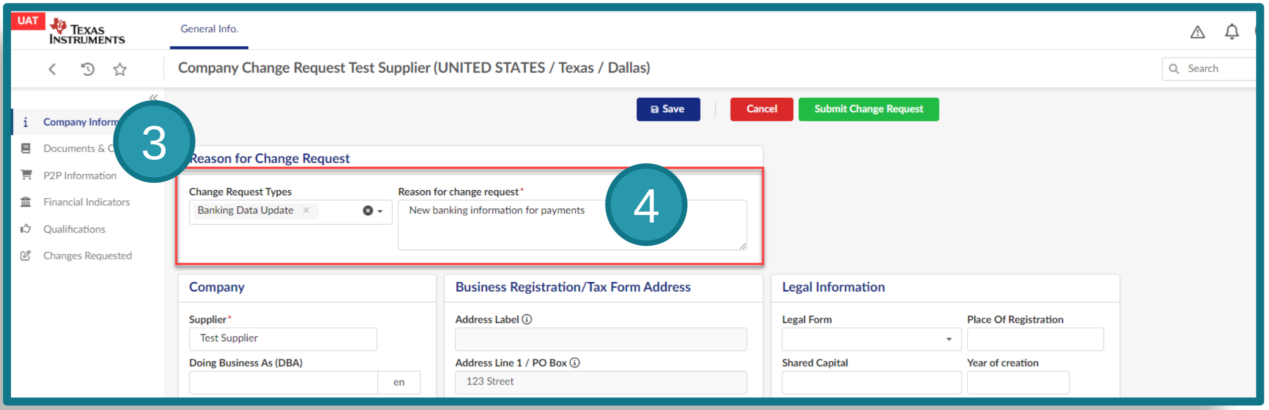
Step 2: Click Request Information Change





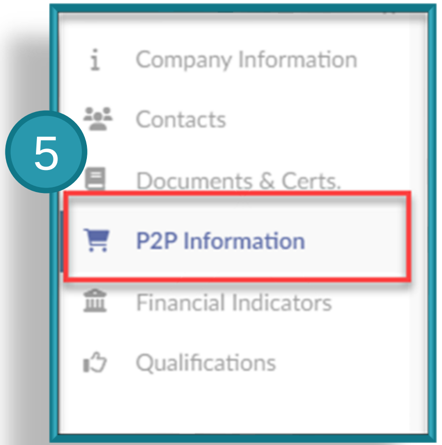
Update Banking Information, cont.

Step 3: Select a Change Request Type
- Change Request Type is used for reporting purposes only.

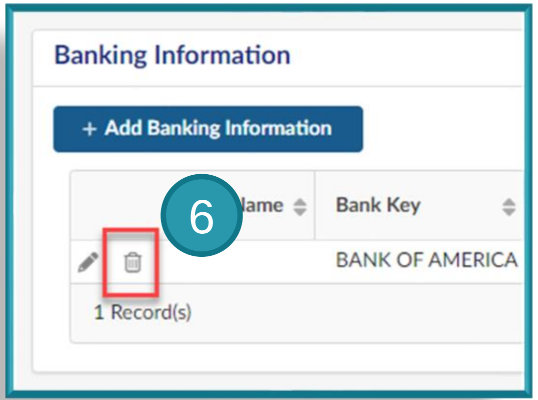


Step 4: Enter a Reason for change request

Step 5: Click P2P Information



Step 6: Click Delete (trash can icon) to remove the existing banking information



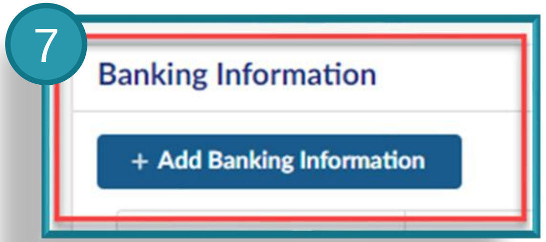
Step 7: Click Save

Update Banking Information, cont.

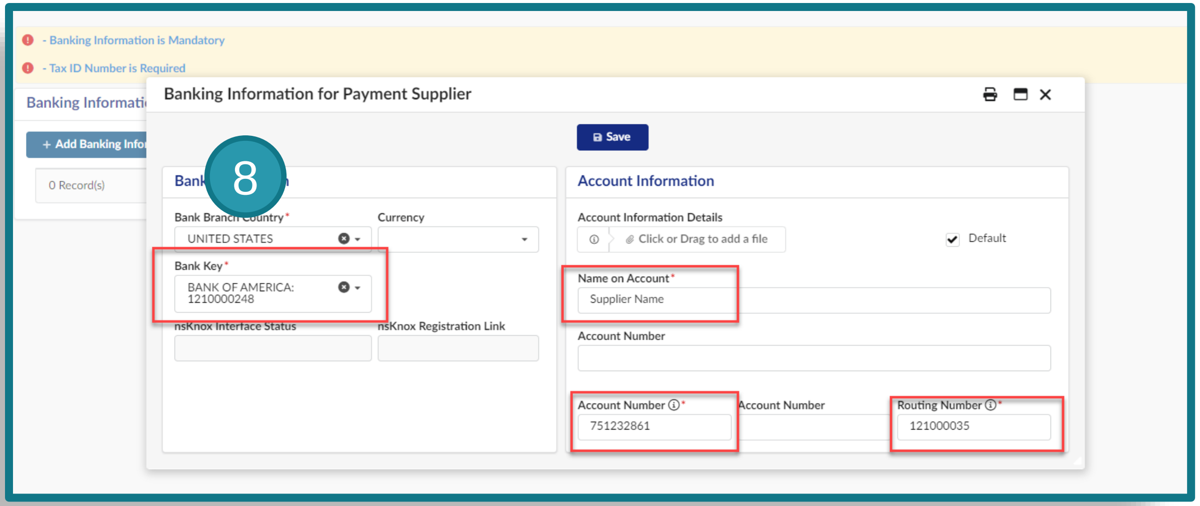
Banking information is only applicable to payment accounts.

Only one bank account can be linked to a payment account

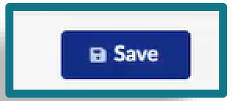
Step 7: Click Add Banking Information



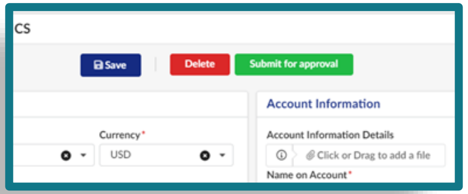
Step 8: Provide Banking Information



Step 9: Click Save



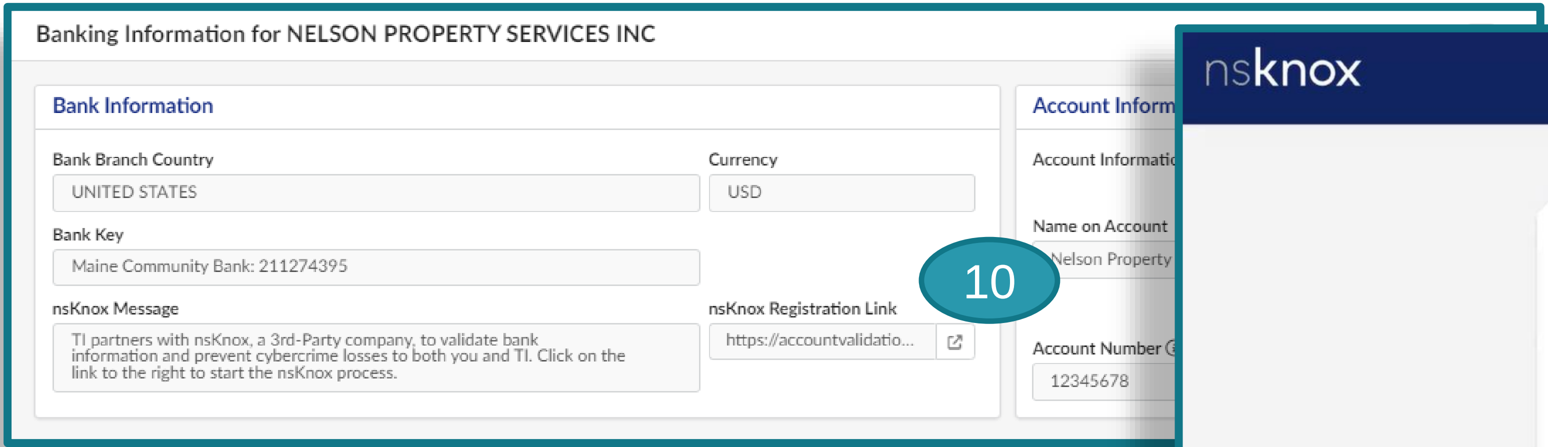
Step 10: Click Submit for Approval

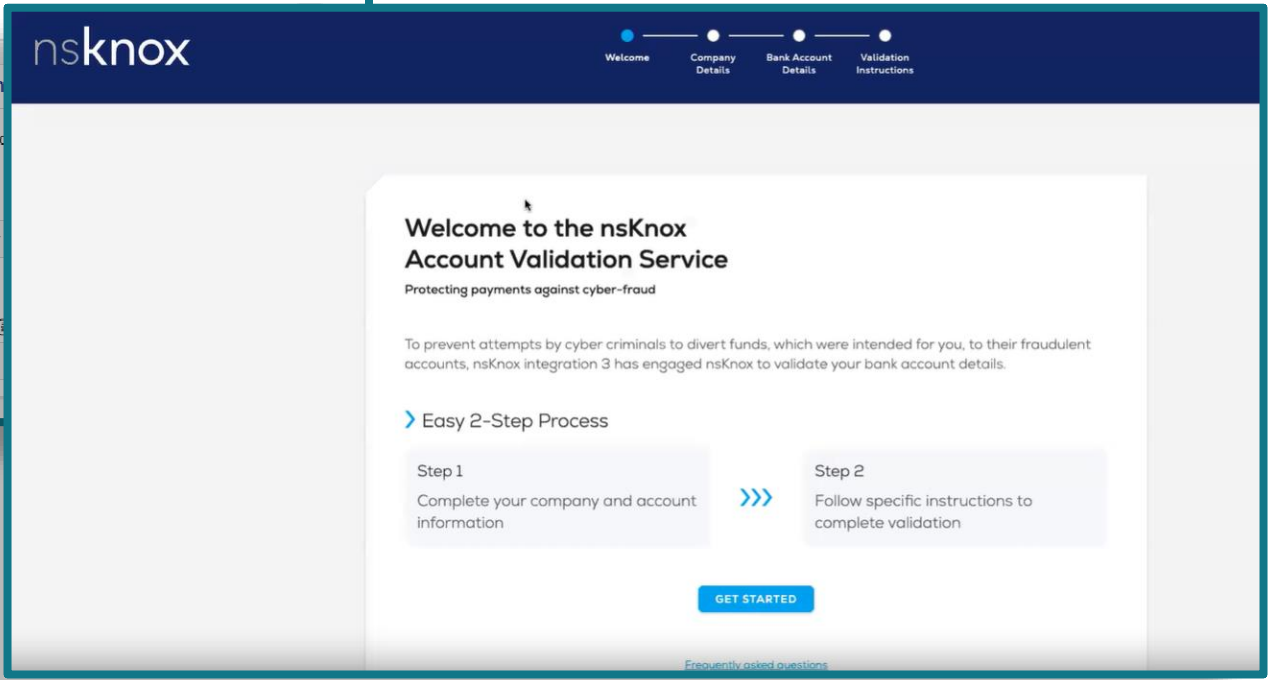


Update Banking Information, cont.

Step 10: Click the link from nsKnox Registration Link field.

You will see this screen

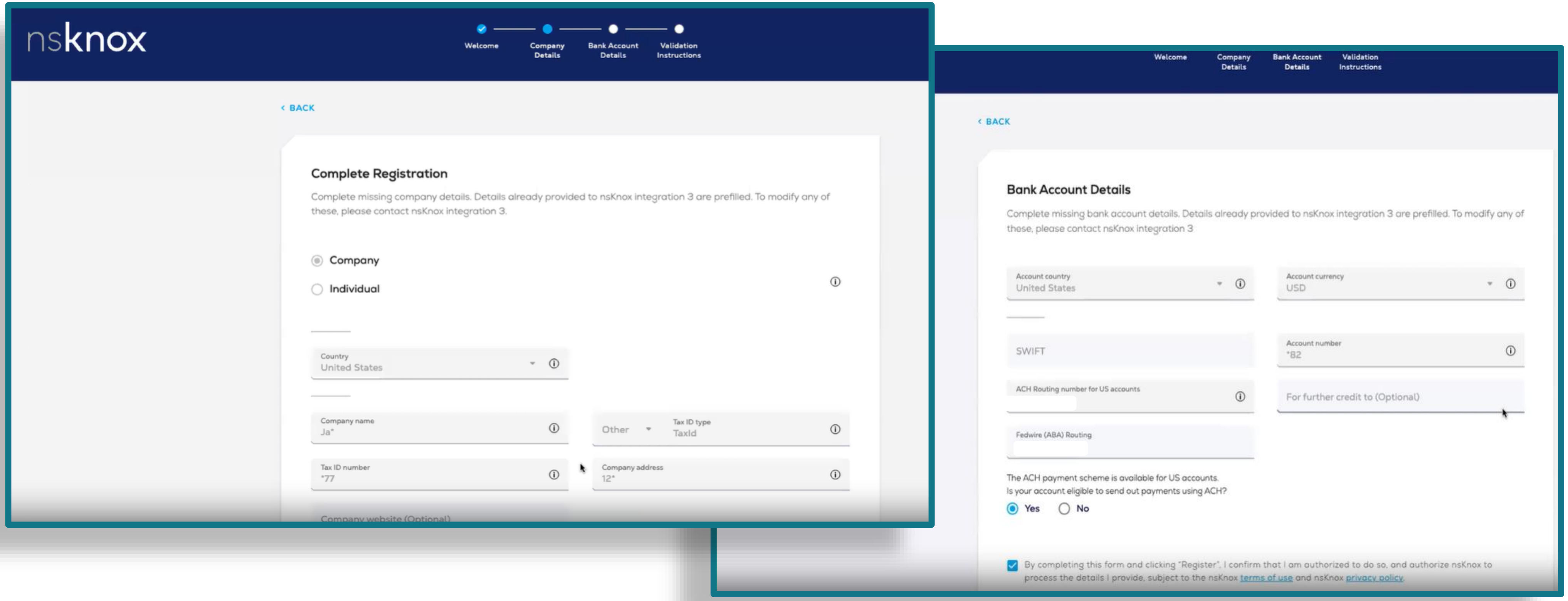




Note: If the nsKnox link is not generated, delete the existing bank information and click Save. Next, add tax ID and click on Save. Finally, add bank information again.

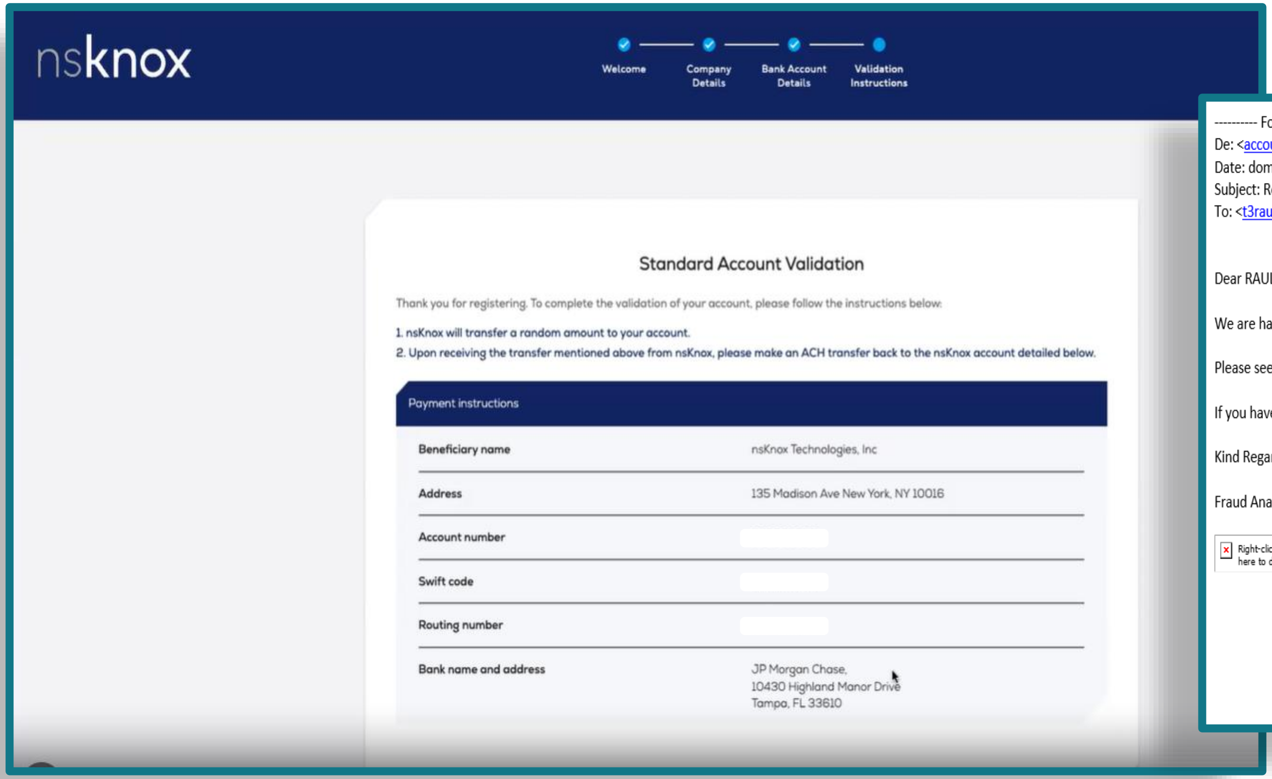
Update Banking Information, cont.

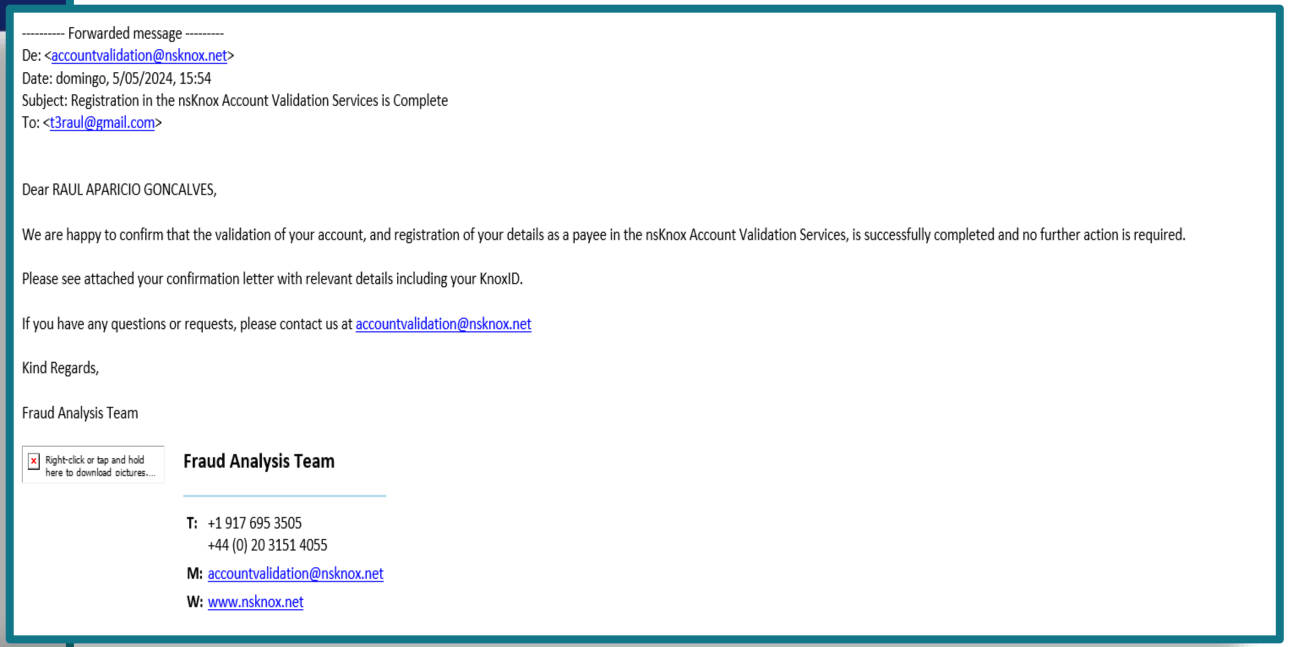
- After clicking the link from Ivalua, you can complete the registration process by reviewing the banking and company information that was carried over from Ivalua.
- Bank country will determine what additional fields must be completed. Ensure that you review the form in its entirety before moving forward.



Update Banking Information, cont.

- Once you have completed the registration process you will see this confirmation screen. You will also receive a Welcome Letter from nsKnox that will also confirm your registration is complete.





---------- Forwarded message ---------
De: <accountvalidation@nsknox.net>
Date: domingo, 5/05/2024, 15:54
Subject: Registration in the nsKnox Account Validation Services is Complete
To: <t3raul@gmail.com>

Dear RAUL APARICIO GONCALVES,

We are happy to confirm that the validation of your account, and registration of your details as a payee in the nsKnox Account Validation Services, is successfully completed and no further action is required.

Please see attached your confirmation letter with relevant details including your KnoxID.

If you have any questions or requests, please contact us at accountvalidation@nsknox.net

Kind Regards,

Fraud Analysis Team

Right-click or tap and hold here to download pictures...

Fraud Analysis Team

T: +1 917 695 3505
+44 (0) 20 3151 4055
M: accountvalidation@nsknox.net
W: www.nsknox.net

Add Banking Information, cont.

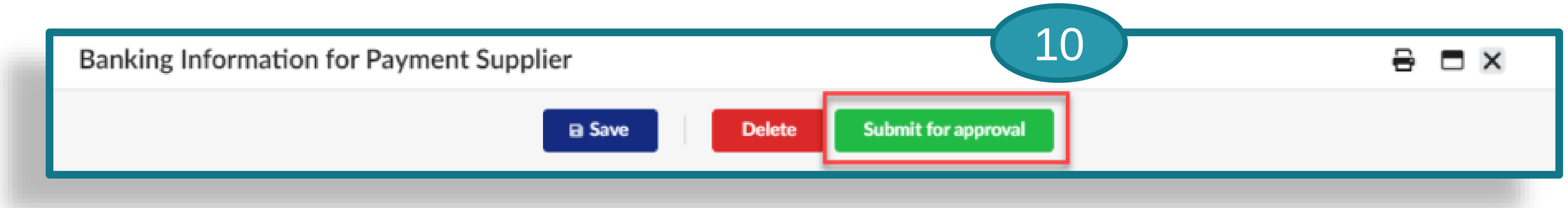
- Once registration is complete, it could take up to 48 hours for verification. Once validated, a confirmation will be received.
- that nsknox will verify if there is any action required, even if bank country is listed as exempt.
- If there is any mismatch of information provided, nsKnox will initiate the Global Wire validation.

	No action required		Planned	US, CA: ACH/EFT validation	EU: SEPA validation	Global: Wire validation
Payee	• UK • Poland • South Africa • Some US • India • China (CNY) • Japan (JPY) • Brazil • Mexico (MXN)	• Chile (CLP) • Argentina (ARS) • Vietnam (VND) • Israel • France • Netherland • Italy • Indonesia	• South Korea • Sweden • Other	• PaymentKnox transfers a random amount • Payee returns same amount to nsKnox validation account over ACH/EFT	• Payee transfers 1 EUR to nsKnox validation account over SEPA	• Payee wires 10 USD or equivalent in any currency to nsKnox validation account

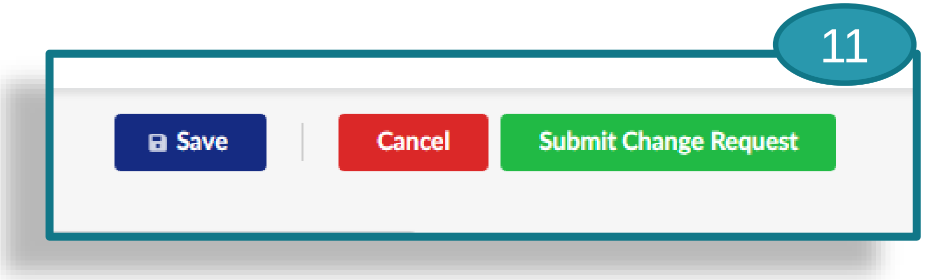
- nsKnox will transfer a random amount as part of the validation process. The process and amounts are based on Country as outlined below.

Update Banking Information, cont.

Step 10: Click Submit for Approval



Step 11: Click Submit Change Request



Supplier Self Service Maintenance

Financial Indicators

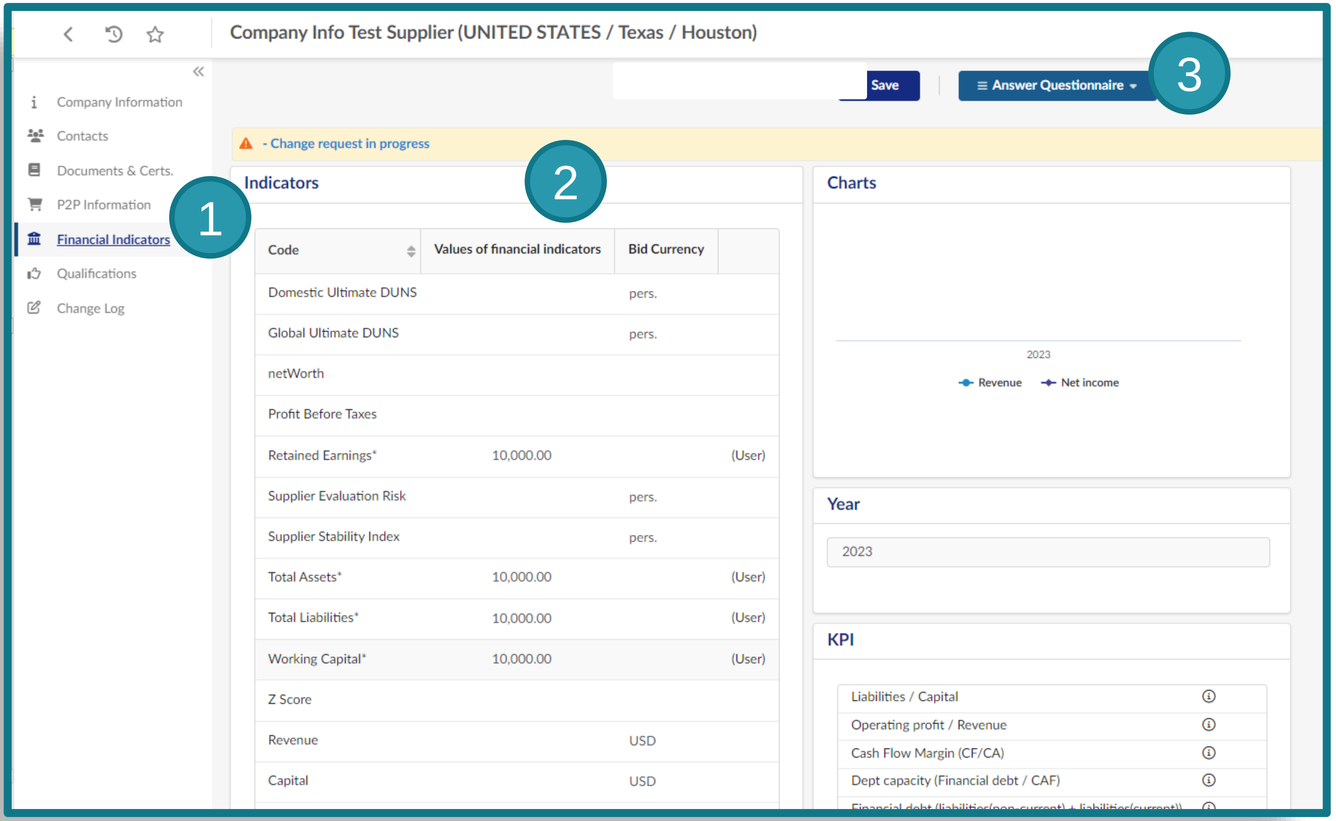
Financial Indicators

- Financial Indicators are only needed for order accounts.
- Financial Indicators will populate from Dun & Bradstreet where available.
- When it is not available, TI will initiate a request for you to submit a Financial Questionnaire

Step 1: Click Financial Indicators

Step 2: Enter financial information

Step 3: Click Submit Financial Questionnaire



Once your request is submitted, TI will review and respond.

Course Summary

Thank you for your participation in this course.

Now, you should be able to:

- Register and access Ivalua for Texas Instruments
- Navigate to find your company information within the Ivalua application
- Create and maintain contacts for your company
- Maintain your company's information

Thank you!