Providing your Company Details to HSBC

Procurement Processes

Supplier Guide

Onboarding Via Coupa

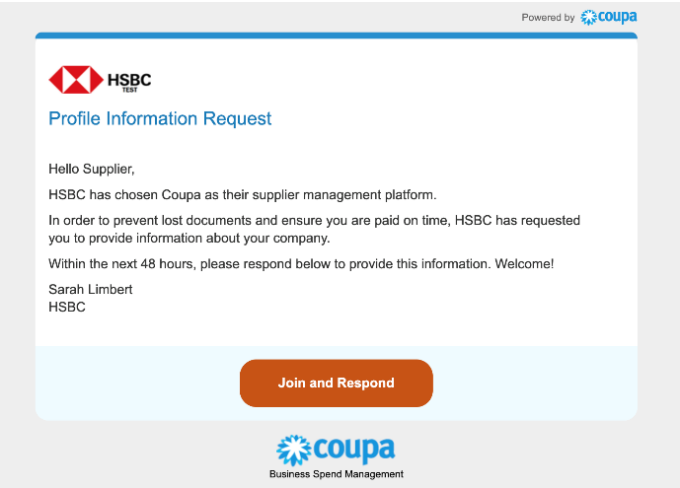
As part of HSBC's digital transformation, we are using Coupa to collaborate with suppliers and exchange documents.
Coupa is a user-friendly Procurement software and platform, which covers the entire procurement process from initiating sourcing activity and contracting through to purchase orders and invoicing.
You will now receive an email notification when we request information from you to support the onboarding process.
This guide will help you to complete and submit the information request to onboard you as a supplier to HSBC.

This guide includes steps for the registration of suppliers who are not ready to provide their company payment details to HSBC (source to contract – S2C)

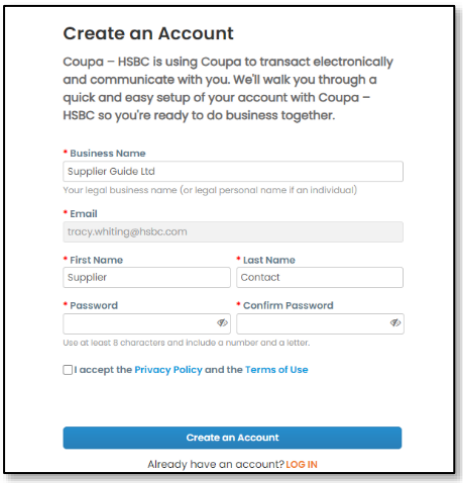
Please ensure all information is accurate and if you are unsure about what information to enter, please ask your HSBC buyer before submitting

Step 1. Register to use Coupa Supplier Portal

When a supplier is being onboarded by HSBC an email explaining the purpose of the contact will be sent from Coupa
Select 'Join and Respond'



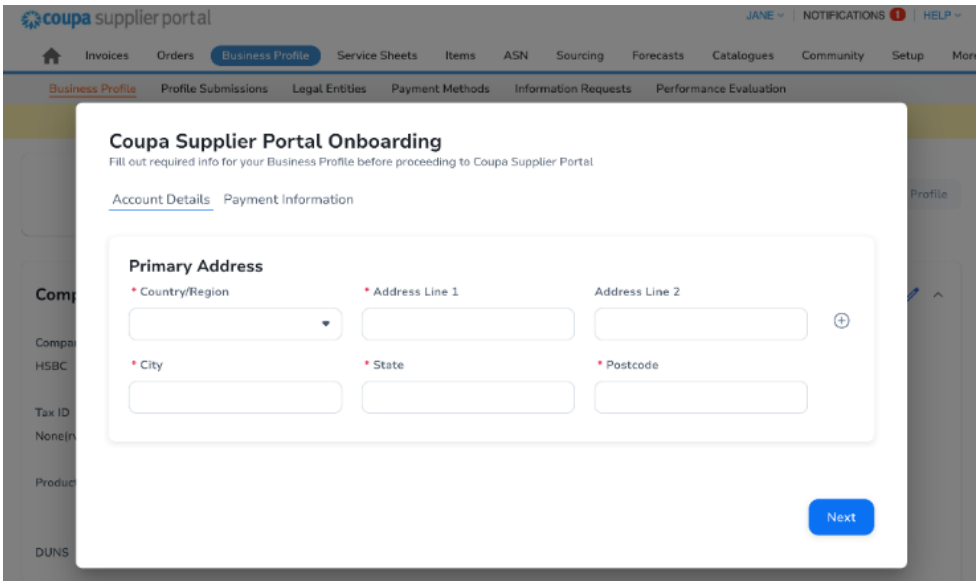
You will be prompted to Create an Account



- Add your Legal Business Name
- Your email address and First Name/Last Name fields will be automatically populated
- Create a Password
- Click on the Privacy Policy and Terms of Use to review. Then click on the box to accept
- Click Create an Account

Click on the dropdown arrow and select Country/Region

- Add your Legal Registered Address
- Add City, State and Postal Code
- Click Next



Complete Coupa Supplier Portal Onboarding. Supplier Payment Account Details.

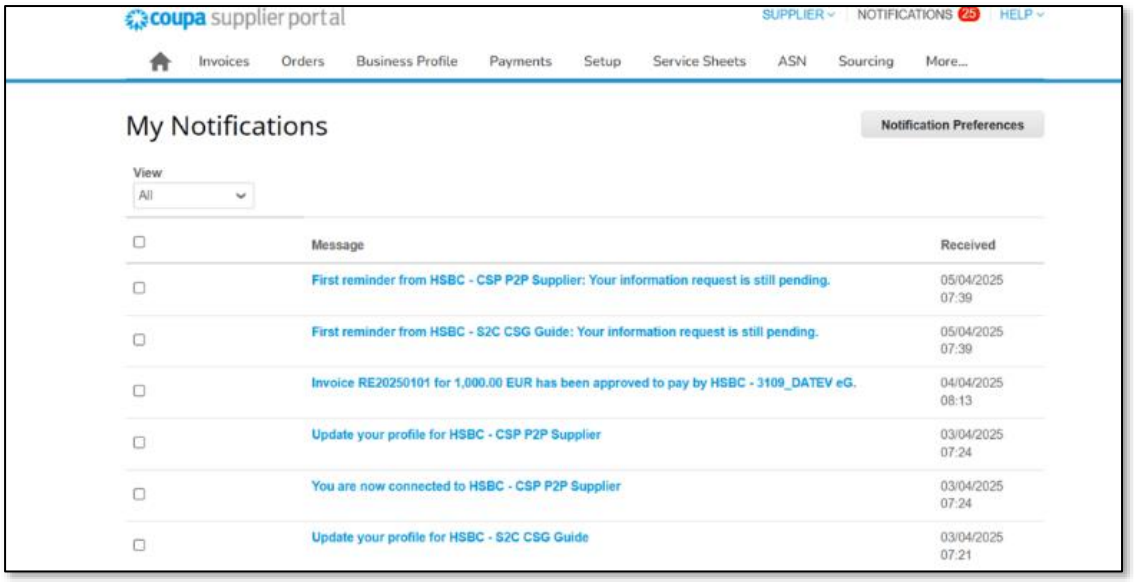
- Coupa will prompt you to provide payment details (Bank Transfer Payment Type only accepted by HSBC)
- HSBC does not require you to provide this information at this stage.
- Please bypass this step by selecting the option "My company does not accept Bank Transfer Payments" from the bottom of the screen and click Next.

Step 2. Respond to HSBC Information Request

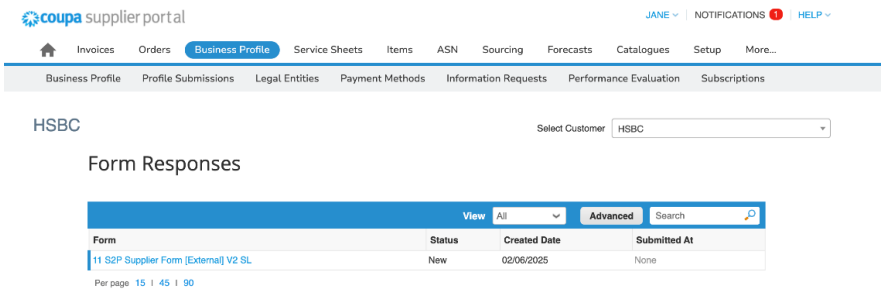
Accessing new requests for information if you have already registered for Coupa Supplier Portal

From Home Page, click on Notifications icon top right.

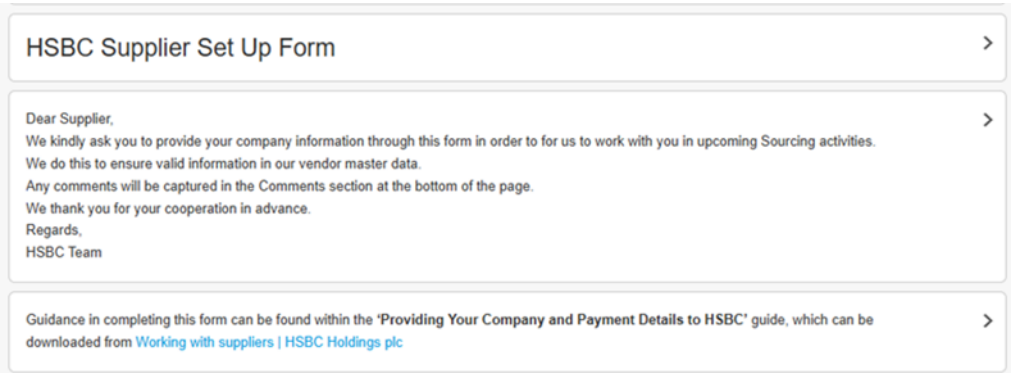
You will see Form Responses – these are information requests for you to respond to. You can check the Status and Submitted At to identify the new request for information.



Alternatively, you can also navigate to Business Profile>Information Requests to see Form Responses – these are information requests for you to respond to.



You will be directed to the HSBC Supplier Set Up Form.

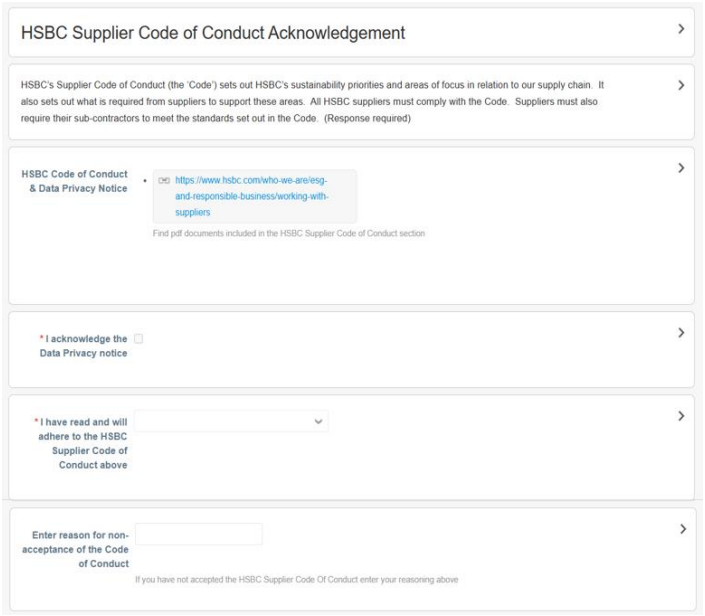


Code of Conduct

HSBC's Supplier Code of Conduct ('the Code') sets out HSBC's sustainability priorities and areas of focus in relation to HSBC's supply chain. It also sets out what is required from suppliers to support these areas. All HSBC suppliers must comply with the Code. Suppliers must also require their sub-contractors to meet the standards set out in the Code.

- Click, open and read the HSBC Code of Conduct & Data Privacy Notice
- Click the dropdown arrow and confirm you have read and will adhere to the HSBC Supplier Code of Conduct

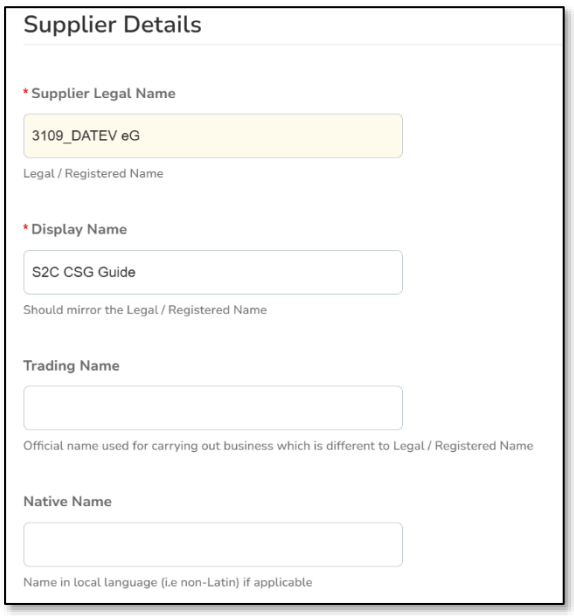
- Enter reason for non-acceptance (if applicable)

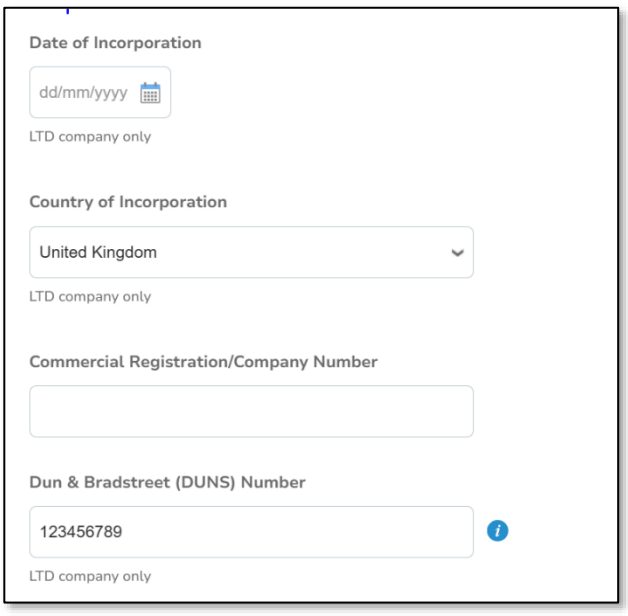


HSBC Supplier Details

Supplier Legal Name will be pre-populated

Complete as much information in the remaining fields as you can



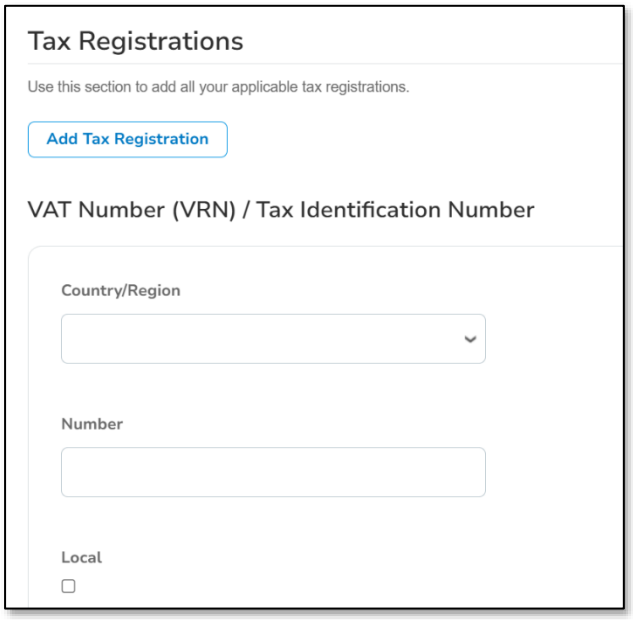


HSBC Tax Details

Click on Add Tax Registration

The following box will appear. Click on the dropdown arrow to select the Country

Add your Tax Number



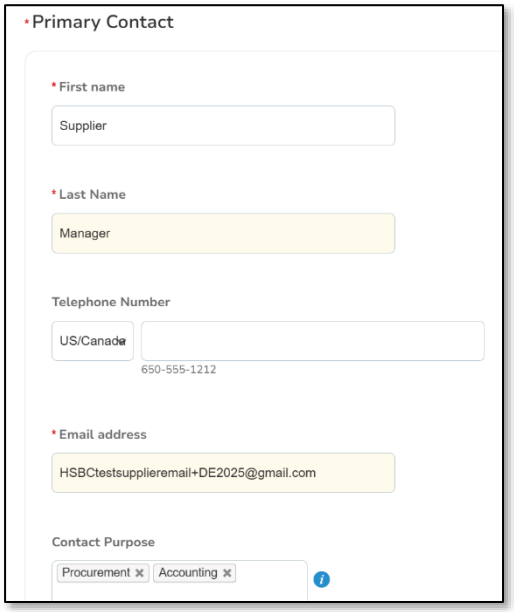
HSBC Primary Contact Details

First Name/Last Name will be pre-populated; add a contact Telephone Number (this can be left blank if preferred and is not mandatory)

Email address will be pre-populated

Click on the Contact Purpose field to select an option (this can be left blank if preferred and is not mandatory)

Please note: The details you entered for Coupa Registration will not be pulled through to the HSBC Form

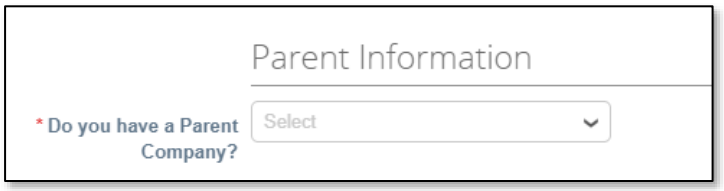


HSBC Parent Information

If you are a subsidiary supplier owned by a Parent Company, please click on the dropdown arrow and select Yes. You will be asked to add the name of your Parent Company.

Once this Form is submitted and approved by HSBC, this information is visible by our Procurement Team so that HSBC is aware of your Parent Company information.

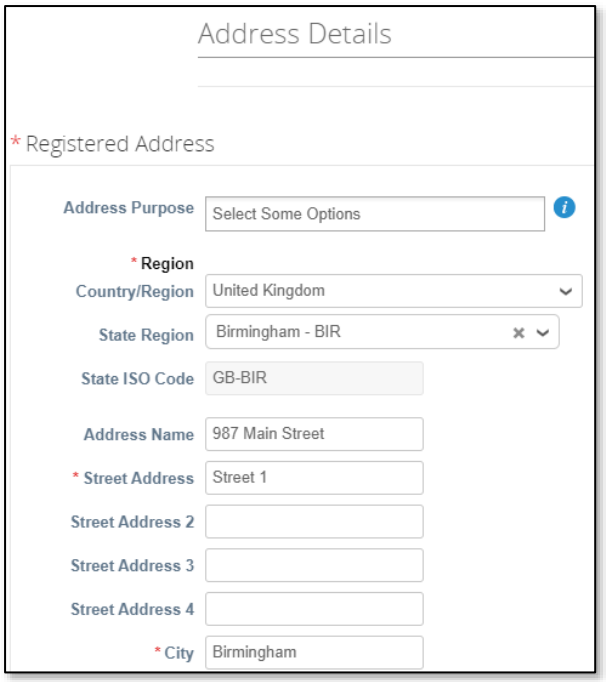
Otherwise, select No and continue



HSBC Address Details

Click on the Address Purpose to select an option i.e. when HSBC is to use this address (this can be left blank if preferred and is not mandatory)

Other mandatory fields will be pre-populated. You can update these details if required



Environment, Supplier Inclusion and Human Rights

The following Environment, Supplier Inclusion and Human Rights sections require you to select all response options applicable to your organisation's current status. Please ensure you provide a response to each section, taking care not to select a 'None of the above is applicable' option with another response option within the same question.

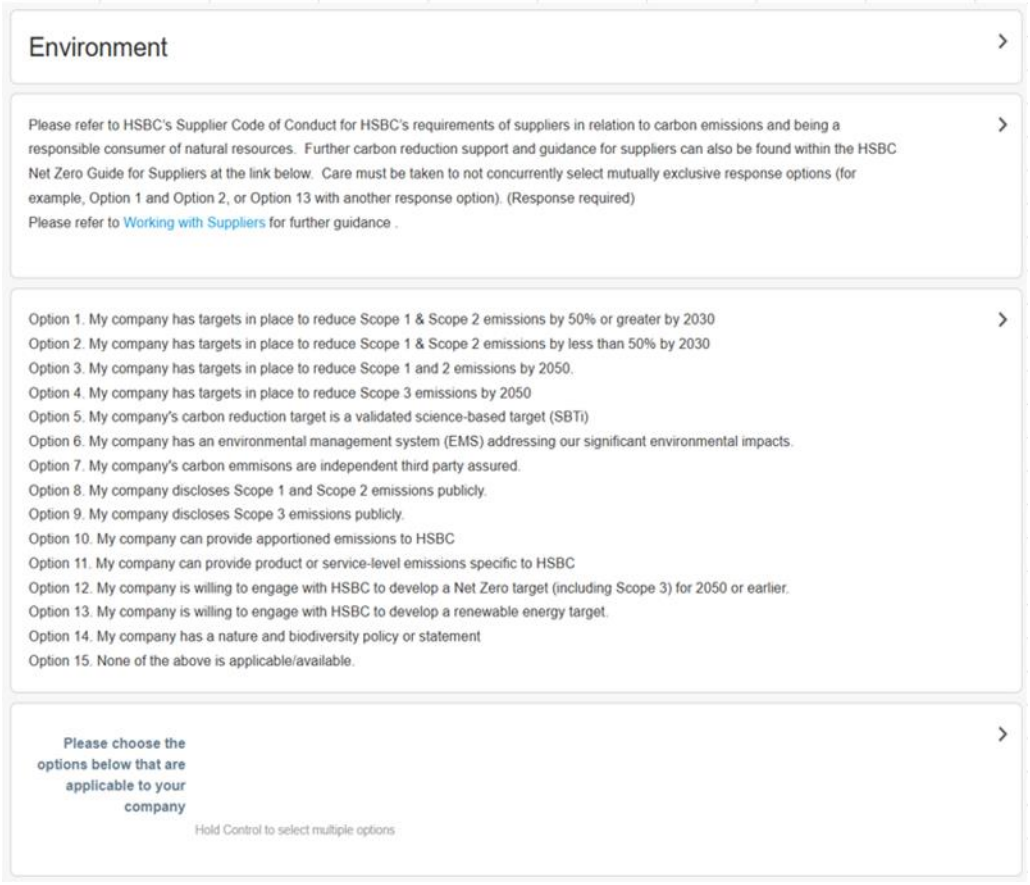
HSBC Environment Details

Supporting the transition to net zero is a key priority for HSBC and we aim to achieve net zero in our own operations, travel and supply chain by 2050, in line with our overarching net zero ambition.

Please refer to HSBC's Supplier Code of Conduct for HSBC's requirements of suppliers in relation to carbon emissions and being a responsible consumer of natural resources. Further support and guidance can also be found within the 'HSBC Net Zero Guide for Suppliers' on Working with suppliers | HSBC Holdings plc

Note: Please take care to not concurrently select mutually exclusive options such as Option 1 and Option 2.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

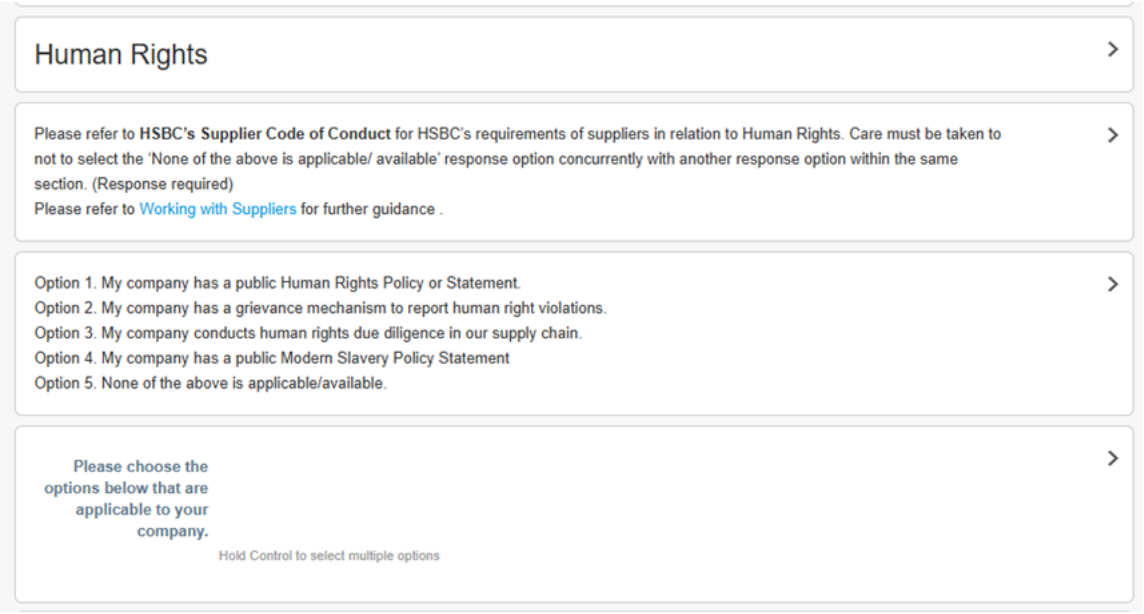


HSBC Human Rights & ESG Details

As set out in HSBC's Human Rights Statement (ESG reporting centre l HSBC Holdings plc), we recognise the role of business in respecting human rights. Our approach is guided by the UN Guiding Principles on Business and Human Rights and OECD Guidelines for Multinational Enterprises on Responsible Business Conduct. We expect our suppliers to uphold these same standards, to not cause or contribute to adverse human rights impacts, and address impacts when they occur.

Please refer to HSBC's Supplier Code of Conduct on Working with suppliers | HSBC Holdings plc for HSBC's requirements of suppliers in relation to Human Rights.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

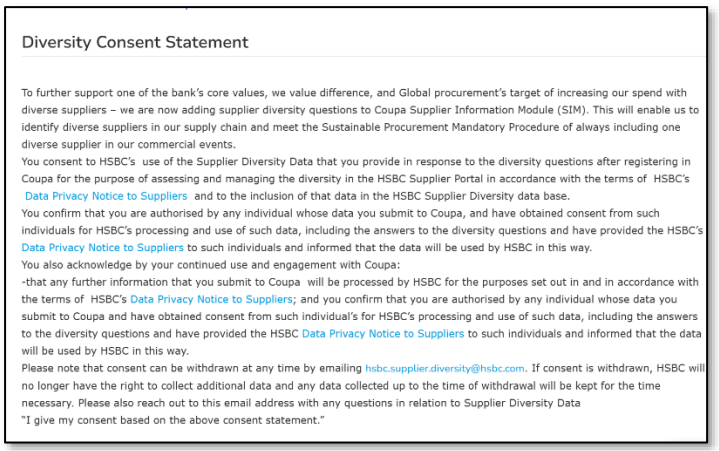


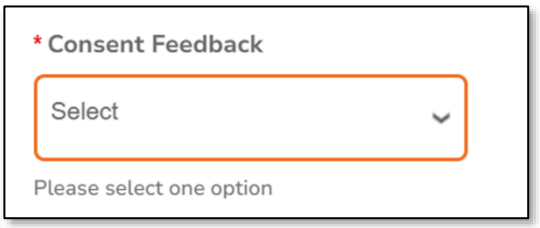
HSBC Supplier Inclusion

HSBC wants to ensure our suppliers represent our employees, our customers and the communities we serve to create a world of opportunity. We believe that creating a diverse supply chain drives innovation and increases our agility and adaptability. HSBC aims to ensure that inclusion is recognised in the goods and services we buy from suppliers, and that supplier teams providing services to HSBC are diverse and the goods and services suppliers deliver are equally accessible to everyone. Supplier Inclusion at HSBC refers to the practice of ensuring equal opportunities for diverse owned businesses to compete for contracts.

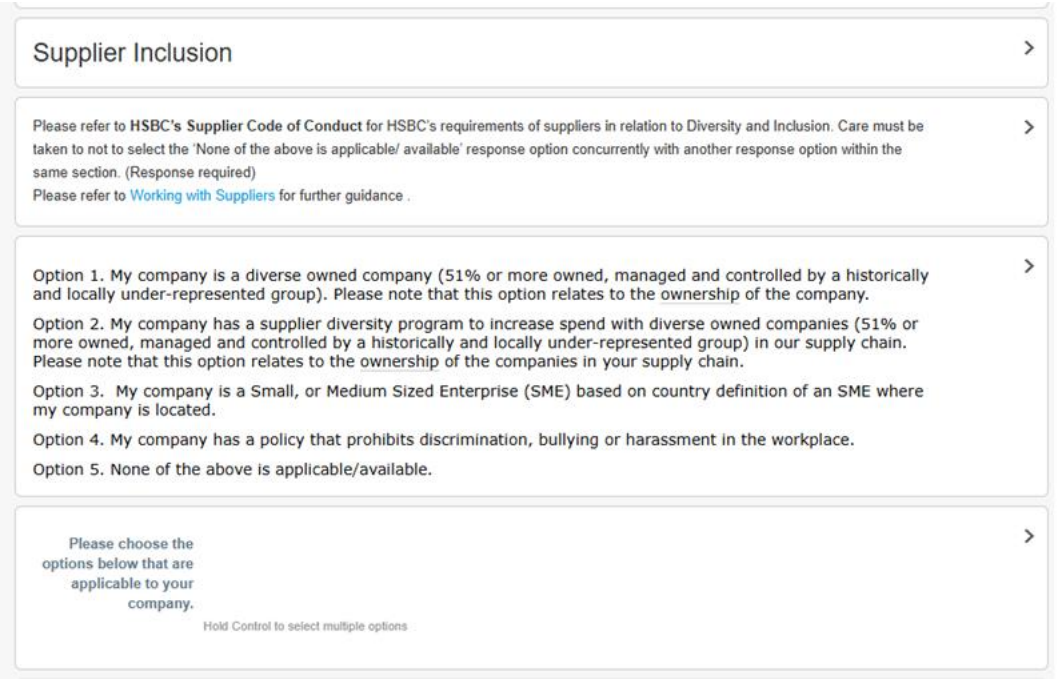
Please refer to HSBC's Supplier Code of Conduct on Working with suppliers | HSBC Holdings plc for HSBC's requirements of suppliers in relation to diversity and inclusion.

- Read through the Diversity Consent Statement and select your Consent Feedback





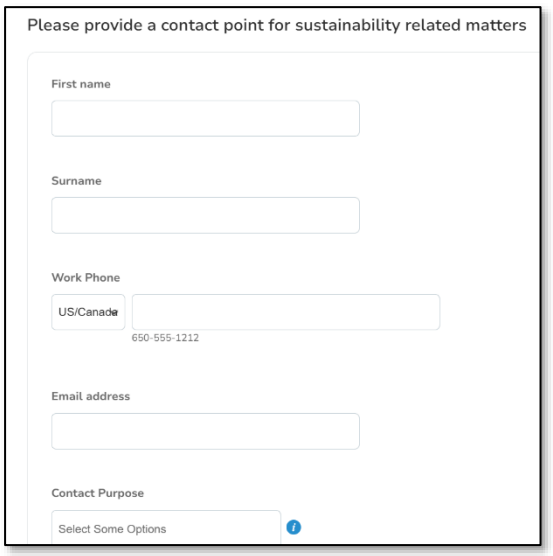
- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options



HSBC Sustainability Contact

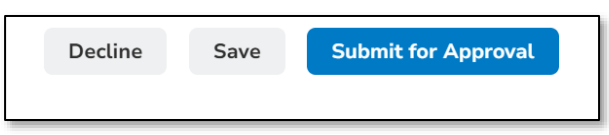
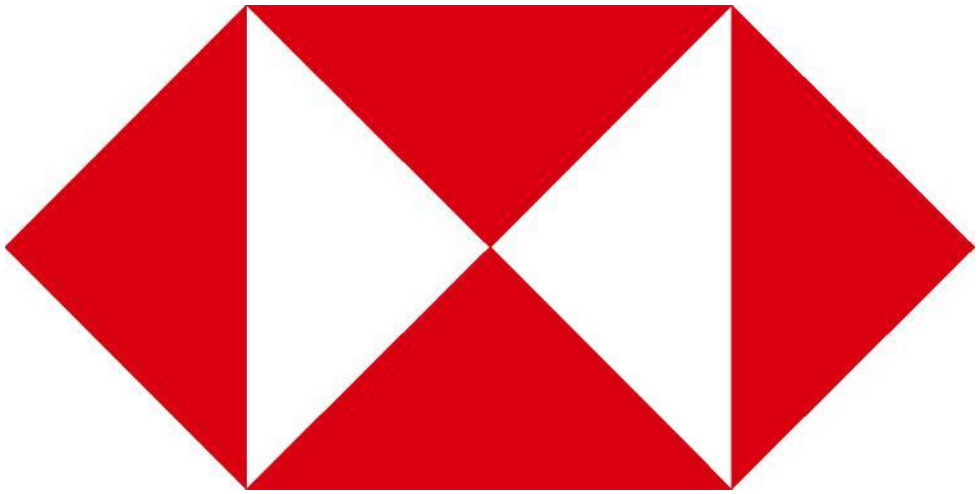
Add a Contact Name and select Contact Purpose.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options



Review details and Submit to HSBC

Review Contact Details and click Submit for Approval. You can also click on Save if you want to return to the Form to review before submitting for approval



You will see a Green banner which confirms your information has been submitted to HSBC and is Pending Approval. You will receive an email confirmation that your Supplier Profile information has recently been updated in Coupa.