

Ariba Supplier Lifecycle Management

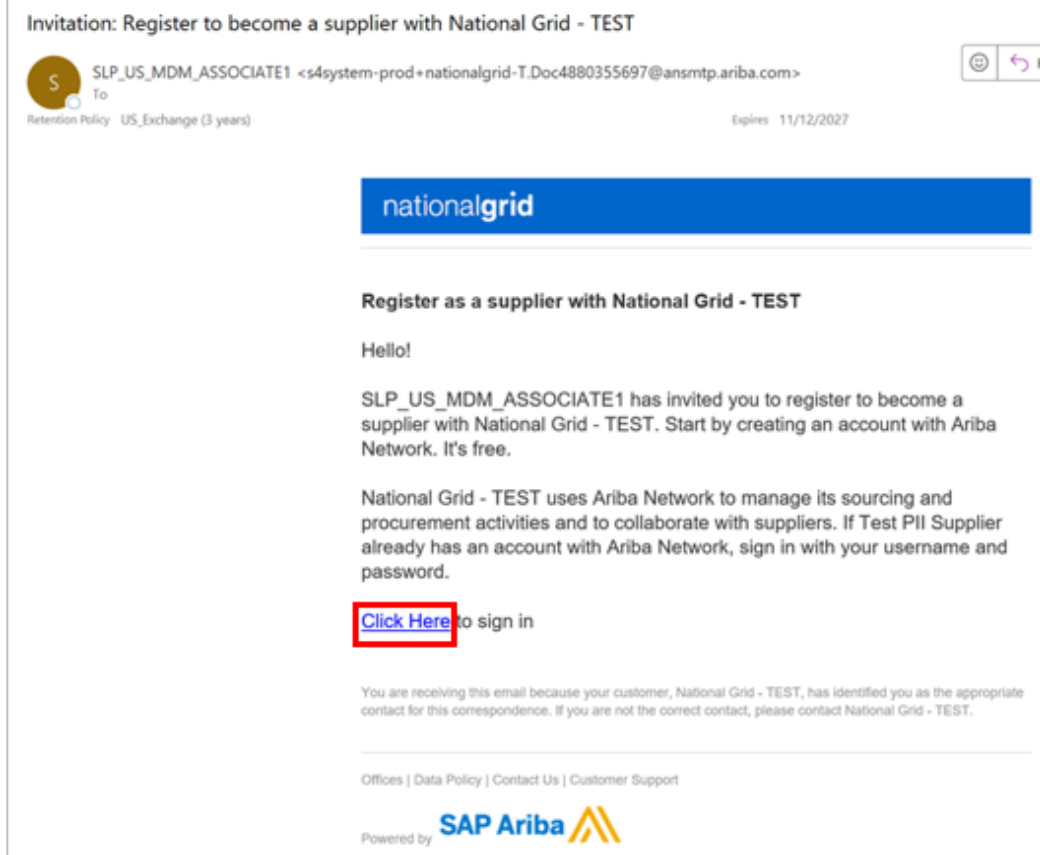
How to Complete the Trading Information Questionnaire - Supplier

Purpose: The purpose of this document is to guide suppliers through the process of completing the Trading Information Questionnaire as part of the Supplier Registration process with National Grid. This document is intended to ensure that suppliers provide all necessary information accurately and efficiently. The completion of this questionnaire is crucial for establishing a trading relationship for procurement and accounts payable activities via the Ariba Business Network.

Completing the Trading Information Questionnaire – Supplier

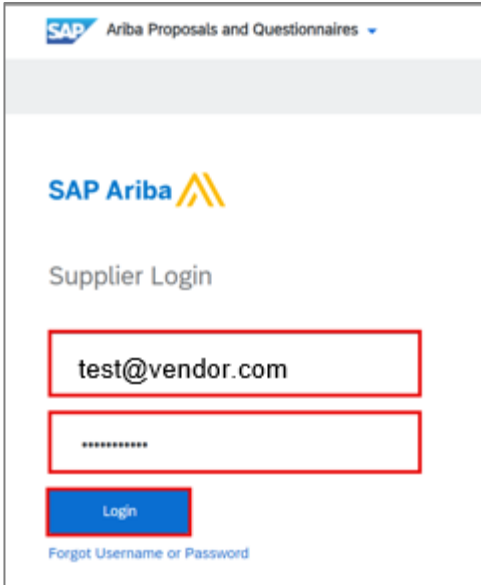
1. Supplier receives email to inviting them to submit their Trading Information Questionnaire. Select “**Click Here**” to Sign in into Ariba Network.

Example email below:



2. If the account already exists on Ariba Network, proceed to login by using existing account credentials. Otherwise, create a new supplier account first.

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Approved by:		Version: 1.0



3. The Trading Information Questionnaire is displayed. Validate and fill below mandatory questionnaire fields:

- General Supplier Information

- Supplier Full Legal Name: (For eg Test PII Supplier)
- Supplier Legal Name: (Auto-populated)
- Onboarding Request Type: (Auto-populated)
- Regions: (Auto-populated)
- Main Address: (Auto-populated)
- Telephone or Mobile Number: Click on 'Add Telephone or Mobile Number' and add the details.

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< Go back to National Grid - TEST Dashboard Desktop File Sync

Console Doc4880355697 - Trading Information Questionnaire Time remaining
6 days 23:31:05

Event Messages

Event Details

Response History

Response Team

▼ Event Contents

All Content

1 General Supplier Inf...

2 Trading Information

3 Transaction Information

4 Payment Methods

7 Organization Informa...

9 Withholding Tax Details

All Content

Name ↑

▼ 1 General Supplier Information

1.1 Supplier Full Legal Name * Test PII Supplier

1.2 Supplier Legal Name (up to 35 characters) * Test PII Supplier

1.3 Doing Business As (DBA) or additional space for Supplier Legal Name if greater than 35 characters

1.4 Attention To

1.5 Formerly Known As (FKA)

1.6 Onboarding Request Type * Purchase order Only

1.8 Regions +USA [select]

+Show More

Street: Suite 2200 House Number:

Street 2:

Street 3:

Street 4: 2 Tower Center Boulevard

District:

Postal Code: 08816-1100 City: East Brunswick

Country/Region: United States (US) State/Province/Region:

1.9 Main address

1.10 Telephone or Mobile Number Add Telephone or Mobile Number (1)

○ Trading Information

- By ticking this box you are confirming that you will transmit and receive traditional Procurement and Accounts Payables documents, such as Purchase Orders, Order Confirmations, Advance Shipment Notifications and Invoices, electronically via the Ariba Business Network? (Select “Yes” - mandatory)
- Please provide your preferred Ariba Business Network ID that you would like National Grid to establish the Trading Relationship for Purchase Order and Invoicing purposes. (For e.g ANxxxxxxx-T)

<p>2.3 By ticking this box you are confirming that you will transmit and receive traditional Procurement and Accounts Payables documents, such as Purchase Orders, Order Confirmations, Advance Shipment Notifications and Invoices, electronically via the Ariba Business Network?</p>	<p>* Yes <input type="button" value="v"/></p>
<p>2.4 Please provide your preferred Ariba Business Network ID that you would like National Grid to establish the Trading Relationship for Purchase Order and Invoicing purposes.</p>	<p>* ANxxxxxxx-T</p>

○ Transaction Information

- PO Contact Person: (For e.g. “Po Contact”)
- PO Contact Email Address: (For e.g. “pocontact@ng.com”)
- PO Contact Phone Number: (For e.g. “9876543234”)
- Remittance Advice Email: (For e.g. “remadvice@ng.com”)
- Remittance Contact Person: (For e.g. “Rem Clerk”)
- Remittance Contact Email Address: (For e.g. “remclerk@ng.com”)
- Remittance Contact Phone Number: (For e.g. “7676565642”)

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▼ 3 Transaction Information	
3.1 PO Contact Person ⓘ	* Po Contact
3.2 PO Contact Email Address ⓘ	* pocontact@ng.com
3.3 PO Contact Phone Number	* 9876543234
3.4 Remittance Advice Email	* remadvice@ng.com
3.6 Remittance Contact Person	* Rem Clerk
3.7 Remittance Contact Email Address	* remclerk@ng.com
3.8 Remittance Contact Phone Number	* 7676565642

○ Payment Methods

- Is your bank located outside the United States?: (For e.g. “No”)
- Do you accept virtual card (Vcard) payments?: (For e.g. “No”)
- Do you accept ACH payments?: (For e.g. “Yes”)

▼ 4 Payment Methods	
4.1 Is your bank located outside the United States?	* No ▾
4.3 Do you accept virtual card (Vcard) payments? ⓘ	* No ▾
4.6 Do you accept ACH payments?	* Yes ▾

○ Organization Information

- Are you an Individual Owned or an Organization based entity?: (For e.g. “Individual Owned”)

▼ 7 Organization Information	
<p>7.1 Individually Owned Businesses: Business entities owned and operated by a single individual. In this type of business, there is no legal distinction between the owner and the business itself. Tax and banking information provided will pertain to the individual owner and not a separate business entity.</p> <p>Organization-Based Businesses: Legal entities separate from their owners. Tax and banking information provided will pertain to the business itself and not to a named individual business owner.</p> <p>Please note: Only businesses located in the United States should select Individually owned if applicable. All others must select Organization based.</p>	
7.2 Are you an Individual Owned or an Organization based entity?	* Individual Owned ▾
<p>7.3 If you are operating as an individual, we are unable to accept the submission of Personal Identifiable Information on this form. Upon submission of your registration, a secure link will be sent via email from Relish IQ (support@relishiq.com) to collect your tax information and payment details. The primary contact on your National Grid supplier profile will receive the email and will need to complete the Relish PII form before you can be registered as a supplier and able to transact with National Grid. Please reach out to us with any questions or concerns via the message board.</p>	

○ Withholding Tax Details

- Please select the appropriate Federal Tax Classification: (For e.g. “C Corporation”)

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▼ 10 **Withholding Tax Details**

10.1 Please select the appropriate Federal Tax Classification * C Corporation ▼

****Note: When adding bank details, incase of multiple bank accounts, ensure that the GB/UK based account is added last for optimal processing.****

4. After entering all the details, click on Submit Entire Response.

Submit Entire Response | Save draft | Compose Message | Excel Import

5. A pop-up appears for confirmation. Select OK to confirm.

Ad

✓ **Submit this response?**

Click OK to submit.

OK | Cancel

Trading Information Questionnaire intake form has been successfully submitted by the supplier.

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All Content	
Name ↑	
▼ 1 General Supplier Information	
1.1 Supplier Full Legal Name	Test PII Supplier
1.2 Supplier Legal Name (up to 35 characters)	Test PII Supplier
1.3 Doing Business As (DBA) or additional space for Supplier Legal Name if greater than 35 characters	
1.4 Attention To	
1.5 Formerly Known As (FKA)	
1.6 Onboarding Request Type	Purchase order Only
1.8 Regions	USA

Personally Identifiable Information (PII) Validation

As a part of Trading Information Questionnaire, if the supplier selects “Individual Owned” entity, PII Validation is triggered. **** PII validation should only be used for US based suppliers"**

Individually Owned Businesses: Business entities owned and operated by a single individual. In this type of business, there is no legal distinction between the owner and the business itself. Tax and banking information provided will pertain to the individual owner and not a separate business entity.

Organization-Based Businesses: Legal entities separate from their owners. Tax and banking information provided will pertain to the business itself and not to a named individual business owner.

Please note: Only businesses located in the United States should select Individually owned if applicable. All others must select Organization based.

In this type of business, there is no legal distinction between the owner and the business itself. Tax and banking information provided will pertain to the individual owner and not a separate business entity, then Relish Data Assure PII approval trigger for validation. As part of Relish PII validation, supplier will receive PII link via email and supplier must fill Relish PII form by adding Bank information, Tax detail and supporting documents/attachments.

The supplier receives the below email:

1. Select “Go To PII Form”

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Relish - PII Invitation

support@relishiq.com
To

Retention Policy US_Exchange (3 years) Expires 11/12/2027

Tue 11/12/2024 3:08 PM

Summarize

Reply Reply All Forward

The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

Secure Session Request: PII Information

Hello: saumya.khurana@pwc.com

You recently registered as a supplier for National Grid Test and indicated that you had Personally Identifiable Information (PII) as part of your registration.

The link below will take you to a secure session in which we can take your information, validate it and encrypt it to complete your registration process.

[Go To PII Form](#)

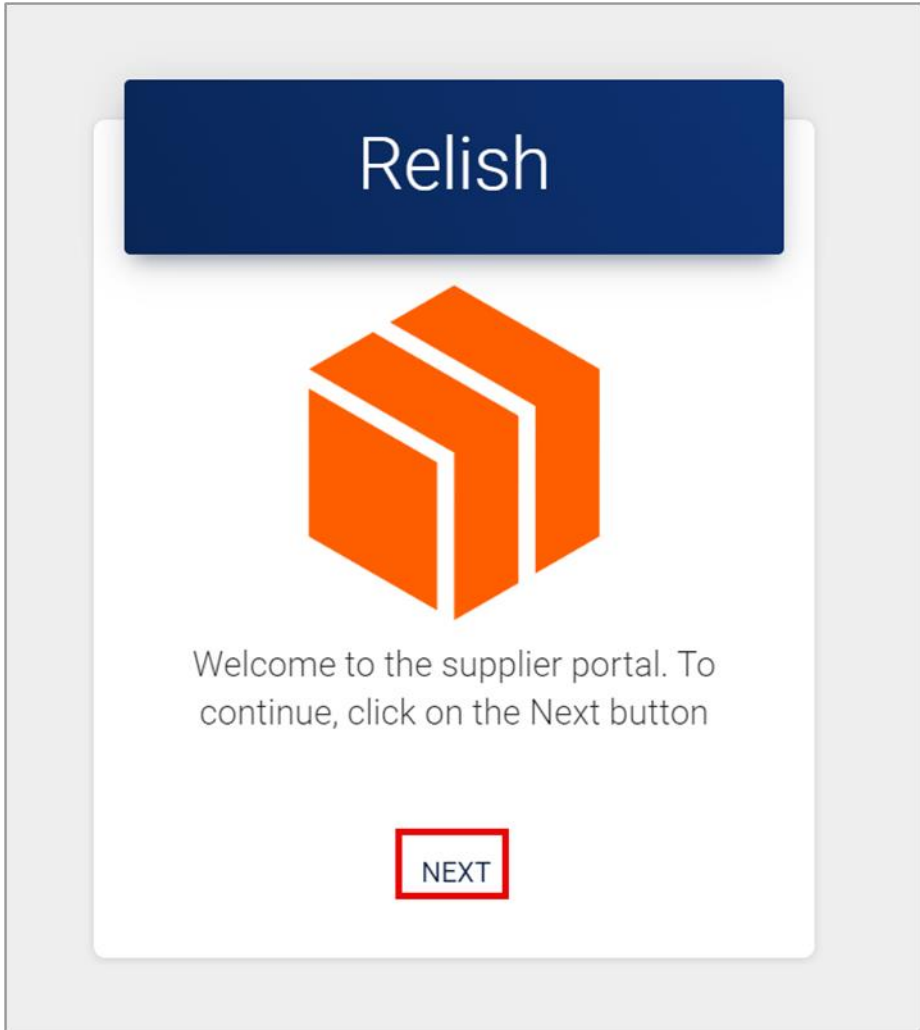
If you are having any issues with your account, please don't hesitate to contact us by replying to this mail.

Relish 3000 Auburn Drive Suite 430 Beachwood, Ohio 44122 USA

You're receiving this email because you have an PII request. If you are not sure why you're receiving this, please contact us at support@relishiq.com.

2. Select Next

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- Supplier receives another email with Access Code. Enter the same access code for Personally Identifiable Information (PII) Validation and click Login.

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Relish - PII Token

Summarize



support@relishiq.com

To

Reply Reply All Forward

Tue 11/12/2024 3:23 PM

Retention Policy US_Exchange (3 years)

Expires 11/12/2027

If there are problems with how this message is displayed, click here to view it in a web browser. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

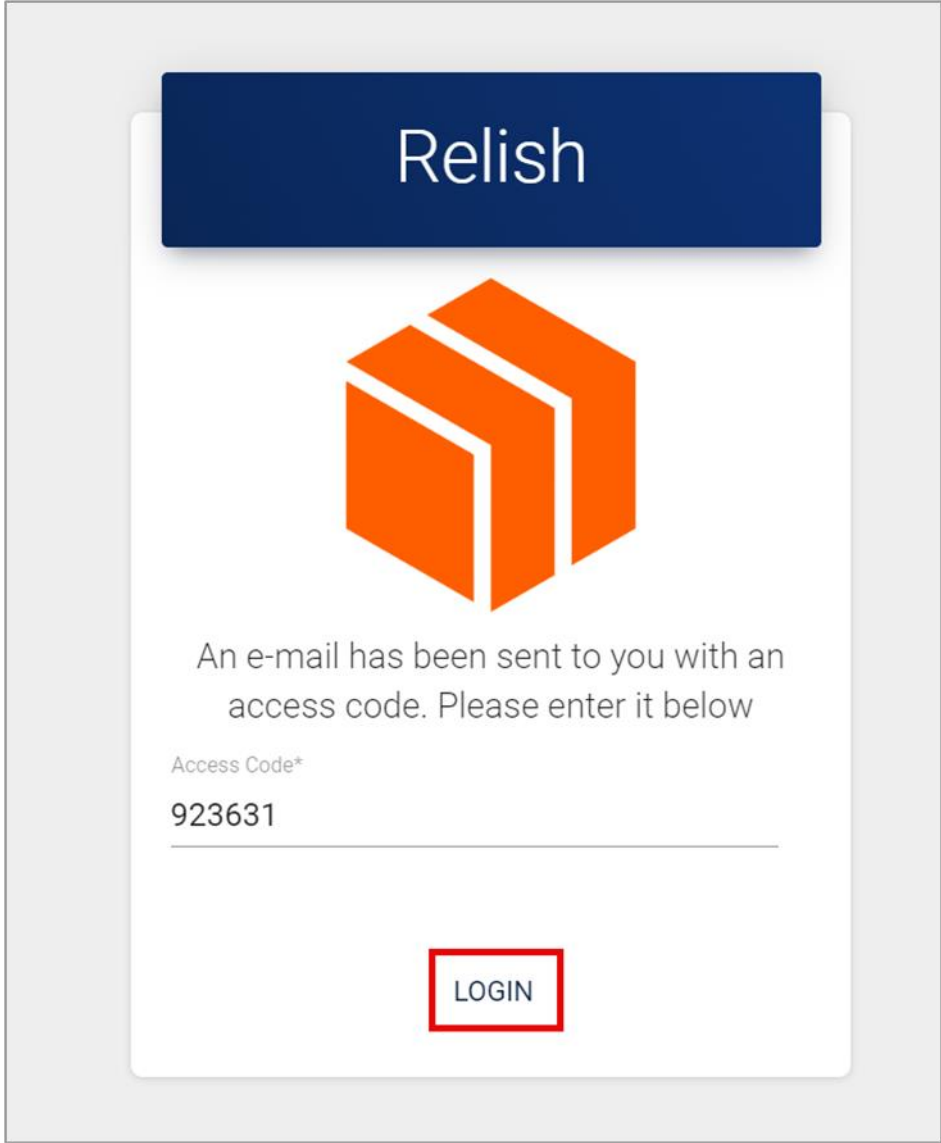
Hi saumya.khurana@pwc.com

Please use the access code below on PII Portal to confirm your identity.

Access Code:
923631
This token will expire in 10 minutes

Relish 3000 Auburn Drive Suite 430 Beachwood, Ohio 44122 USA

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- 4. Personally Identifiable Information (PII) Validation form opens, enter the required details and select “CLICK TO ENCRYPT AND SEND DATA”.

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Sensitive Data Entry and Verification Form

For Supplier: Test PII Supplier (S70147196)

[RESET](#)

Personal Tax ID Info

Upload Tax Documentation

Tax Country*
United States

Supplier Type* Individual Tax Type* SSN

Name*
LISA BRADFORD ✓

Social Security Number*
220119357 👁️ ✓

[VALIDATED](#)

Banking Details

Upload Bank Documentation

Bank's Country United States Account Number 123456789 ✓

IBAN Number Routing Number 026009593 ✓

SWIFT code

Bank Name*
Bank of America NA ✓

[VALIDATED](#)

Additional Attachments

Attach documentation of a voided check or letter from bank verifying bank account and routing numbers

1. Sample document.docx

Drag and drop your file here or click.

[UPLOAD FILE](#)

[CLICK TO ENCRYPT AND SEND DATA](#)

5. The form is submitted

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Sensitive Data Entry and Verification Form

Thank you for submitting your information. You can close this window, no further action is required.

6. Supplier receives the below email upon successful Personally Identifiable Information (PII) information submission.

Relish - PII Form Submitted

support@relishiq.com
To

Retention Policy US_Exchange (3 years) Expires 11/12/2027

[Summarize](#)

[Reply](#) [Reply All](#) [Forward](#) [Share](#) [More](#)

Tue 11/12/2024 3:41 PM

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[Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.](#)

The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

Secure Session Request: PII Information

You have completed your registration with National Grid Test by successfully concluding your secure session with us. Your Personally Identifiable Information was gathered, validated and encrypted.

If you are having any issues with your account, please don't hesitate to contact us by replying to this mail.

Once the Supplier data is approved by Relish, the record will be created.

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