

# Intelex Reference Guide For Suppliers



## **Intelex Reference Guide for Suppliers**

### **Purpose:**

The Vendor Setup is done via an electronic form through Intelex to create a new supplier record in the Nexteer purchasing system. The form needs to be processed in proper order with the required supporting documentation to create the supplier. By using Intelex for the supplier setup process we are holding the supplier accountable for their information to be correct while improving the flow of data.

### **Responsibility:**

Suppliers will be directed to the Nexteer website under the heading "Doing Business with Nexteer" ([www.nexteer.com/doing-business-with-nexteer/](http://www.nexteer.com/doing-business-with-nexteer/))

This document will provide some explanation of the data needed and required for properly set up the new supplier for Nexteer.

### **Overview:**

**Section 1:** Create Request

**Section 2:** Complete Form Data

### Section 1 - Create Request

*This is the initial stage of the Vendor Setup application. This stage is meant to allow any organization not currently doing business with Nexteer to request to begin the process of becoming a Nexteer Vendor.*

1. Access the public form from Nexteer's Webpage at <https://www.nexteer.com/doing-business-with-nexteer/>
2. Acknowledge the Data Privacy Notice & Sustainability Requirements statements. **If you do not acknowledge this information, a request cannot be submitted to Nexteer.**

Complete the remaining fields on the form. Required fields will be denoted with an asterisk \* on the web form.

3. **Organization Name:** Enter your company's name as it should appear on purchase orders and bank payments. If you have a valid duns# in Duns & Bradstreet the name must also match the D&B record.
4. **Local Language Organization Name:** Enter your organizations name in your local language. This is **required** for suppliers located in China doing business with Nexteer in China.
5. **Supplier Contact Name, Email Address and Phone Number:** This information will be used to provide you access to Nexteer's Intelex system (a requirement for doing business with Nexteer). Please be sure you will have access to this email address. The information can be changed after the request is completed, if necessary.
6. **Supplier Type: Direct or Indirect** (This will determine the type of data we are required to collect from you):
  - a. **Direct:** You provide raw materials and goods directly related to our production. (Will usually have an open, blanket PO and receive schedules (releases) and provide ASN's.)
  - b. **Indirect/Prototype:** You provide goods and services not related to our production. (Will usually get separate PO's for a specific amount of product.)
  - c. If you are unsure which to select you can reach out to the buyer you have been working with or select your best guess. You can always add a comment to the type of product/service you provide.
7. **Location Type: This should be the Supplier Head Office.** A supplier's head office address MUST have a physical location. If a supplier wishes for their Head Office address to be a PO Box, they must still provide a physical location, this will be set up as Head Office Physical. The addresses will be entered later in the screen.
8. **Nexteer Location requesting Setup:** Select the region you are doing business with. If you have not been in touch with someone at Nexteer you may select the region you wish to do business with. The request will need to be approved by the local purchasing department.

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9. **Nexteer Ship To Regions:** Select the Nexteer regions that you intend to do business with. This is just for informational purposes. You may be required to complete an additional form for other regions due to different requirements.
10. **Nexteer Buyer Name:** Enter the name of the Nexteer person you have been in contact with. If unknown please leave blank.
11. **Supplier Location Address Information:** This should be your company's Head Office information. If you would like to have the Head Office location set to a PO Box you may do so but you must still include a physical address. Once you receive the form back requesting additional data you will have the opportunity to provide additional addresses (such as remittance, manufacturing, ship from).
12. **Duns Number:** Please provide your Duns number if your company has one registered with Duns and Bradstreet. Having the duns number helps identifies your company and provides us with a background check. **A Duns# is required for all DIRECT suppliers.**
13. **Supplier Comments:** You may leave comment such as the type of services/goods your company provides or other information you feel will help us with your setup. Please remember you will get a chance to enter additional information once the form is approved by Nexteer.
14. **Connected Parties Transactions:** Confirm whether the company you represent, and its owners and/or executives, are Connected Persons in relation to AVIC or any of its subsidiaries or affiliates.
15. Click **Submit** at the top of the screen.
16. The form will be sent to someone within Nexteer for review. If the request is approved, the form will be returned to the Supplier Contact you provided. You will then be asked to log back in to complete your Supplier Profile and provide the required information needed to set your company up as a Nexteer Supplier in our systems.

### Section 2 – Complete Form Data

*This stage allows the supplier to enter the remaining data that is required by Nexteer before being setup in their purchasing system.*

*The form can be completed over time (saved as you supplier go along) without requiring all fields to be complete. However, you will need to check the box near “Comments” indicating that the form is complete before you can submit the form back to Nexteer.*

1. Once you receive your confirmation email you may access the data form using the login information contained in the email. Please note you may have to reset your password upon your first login.
2. Click on **Edit** to open the fields up for editing.

Complete the remaining fields on the form. Required fields will be denoted with an asterisk \* on the web form. **NOTE:** There may also be forms or documents that are required for you to attach.

3. **Remittance Address & Remittance Mailing Address:** If the remittance address is different than your Head Office location already provided please enter it here. If your Remittance address is a PO Box please also provide a Remittance Physical Location.
4. **Bank Information:** The banking fields that are required will depend on the country your bank is in and the region you are being set up for. Provide at minimum the banking information required.
  - a. Scroll to the top of the screen to see ‘Bank & Tax forms’. Some regions will require you provide a bank document with signature and/or stamps. Once you go to the Bank & Tax forms page you can select the proper forms for the region you are requesting to be setup in. You must print these forms out to attach them to the setup form.
  - b. You may provide a secondary bank account if you wish to set up two different currencies. Even if the same bank account allows you to receive payment in different currencies you must still complete the secondary bank section as we can only set up one currency for each account.
  - c. If the name of your bank account differs from your organizations name please make sure to make note of it on the bank forms or in the comments section at the bottom of the page.
  - d. Be sure you remember to attach the required bank forms and additional bank information (if required) to the Intelex page under the Bank Information section.
5. **Tax Information:** The tax fields that are required will depend on the region you are being set up for.
  - a. Scroll to the top of the screen to see ‘Bank & Tax forms’. Some regions will require you provide a tax document or business license and some with signature and/or stamps. Once you go to the Bank & Tax forms page you can select the proper forms for the region you are requesting to be setup in. You must print these forms out to attach them to the setup form.
  - b. Be sure you remember to attach the required forms and additional information (if required) to the Intelex page under the Tax Information section.

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- c. It is always better to provide too much information than not enough so we don't have to return the form for missing or incomplete information.
6. **Minority Information:** This is only for US located suppliers if applicable.
  - a. Please provide the data requested and attach a copy of your minority certificate.
7. **Union Information:** This is only for US located suppliers if applicable.
8. **Contact Information:**
  - a. **Sales & Finance contacts are required for all suppliers:** Provide a sales and finance contact so we can contact your company regarding purchases and/or payment issues. If the same contact is used for both sales & finance please enter the contact in both fields.
  - b. **Remittance Email Address is required for all suppliers receiving payment via WIRE or ACH:** Provide the email address where you would like the pdf remittance email to go after each payment.
  - c. **EDI contact:** An EDI contact should always be provided for all Direct Suppliers that will receive schedules against the purchase orders.
9. **Comments:** Feel free to provide any comments that will help up set up your company as a Nexteer supplier. **Note:** This is not a space to negotiate terms but to initially set your organization up in our system.
10. Click on **'Save'**. You will be asked to attach your Corporate Organization Structure in the Connected Parties Transactions section.
  - a. **Indirect supplier:** Skip to step 12
  - b. **Direct supplier:** Continue to step 11
11. **Business Relation Locations (Manufacturing & Ship From Location Info): This is required for DIRECT suppliers and will not be shown on the form for Indirect suppliers.**
  - a. Click on **'Add Entry'**
    - i. Enter Location Type, Location Name, Location Address and Duns Number
    - ii. Click on **'Save & Exit'**.
  - b. You will need to add **AT LEAST ONE Location Type of Manufacturing** location for you company. Even if this is the same as the Head Office location your already provided at the top of the screen.
  - c. You must provide a **valid** duns number for **ALL manufacturing** locations.
  - d. You cannot complete the setup without **AT LEAST ONE Manufacturing location**.
  - e. If you have additional Manufacturing or Ship From locations you may add them here one at a time by repeating step 11.a.i
12. **Check this box to mark form as complete:** Be sure you have attached any required documents. You may be requested to provide additional data/documents based on each region. Then check this box to verify you have completed all requirements before the form is submitted.
13. Click on **'Form Completed'** to submit the form to Nexteer.