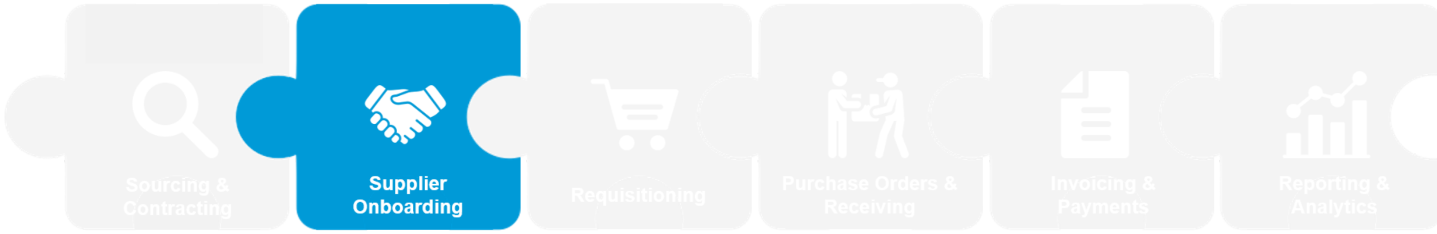
Coupa Spend Management Platform
SUPPLIER UPDATE FORM

Audience: Suppliers



Welcome to the Coupa Supplier Portal (CSP)! The CSP is a free tool for suppliers to easily do business with Gartner. This guide will walk you through the onboarding process and the form that you will need to submit.

Please note: To preserve our reputation for independence and objectivity, Gartner's selection of any provider for any product or service does not constitute an endorsement or recommendation.

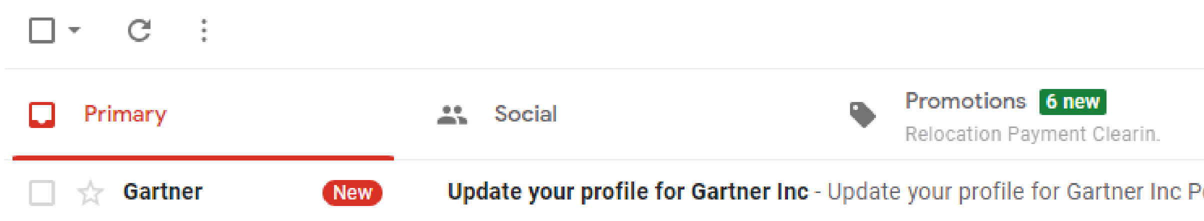
Contact for issues/support: *supplierprocuretopay@gartner.com*

Create Your Account

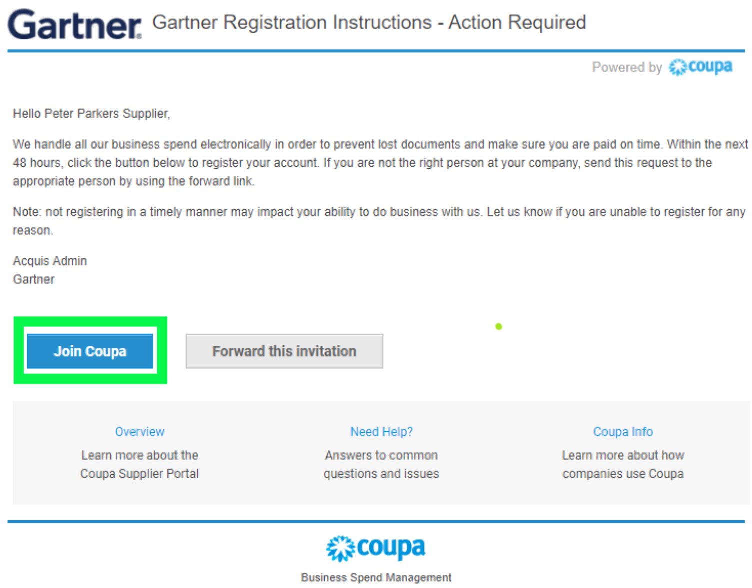
To create an account in the CSP, you can either sign up using the email invitation from Gartner or directly via the portal site.

Gartner Email Sign Up

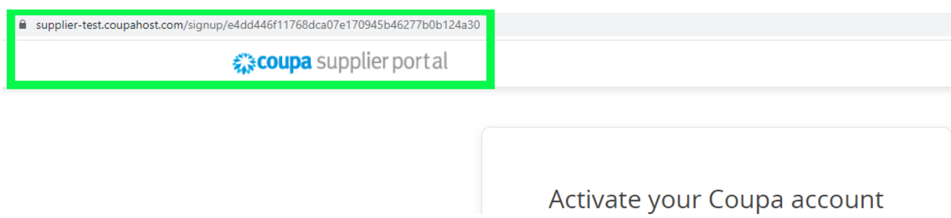
1. An email will be provided from Gartner that starts the onboarding process in **Coupa Supplier Portal (CSP).**

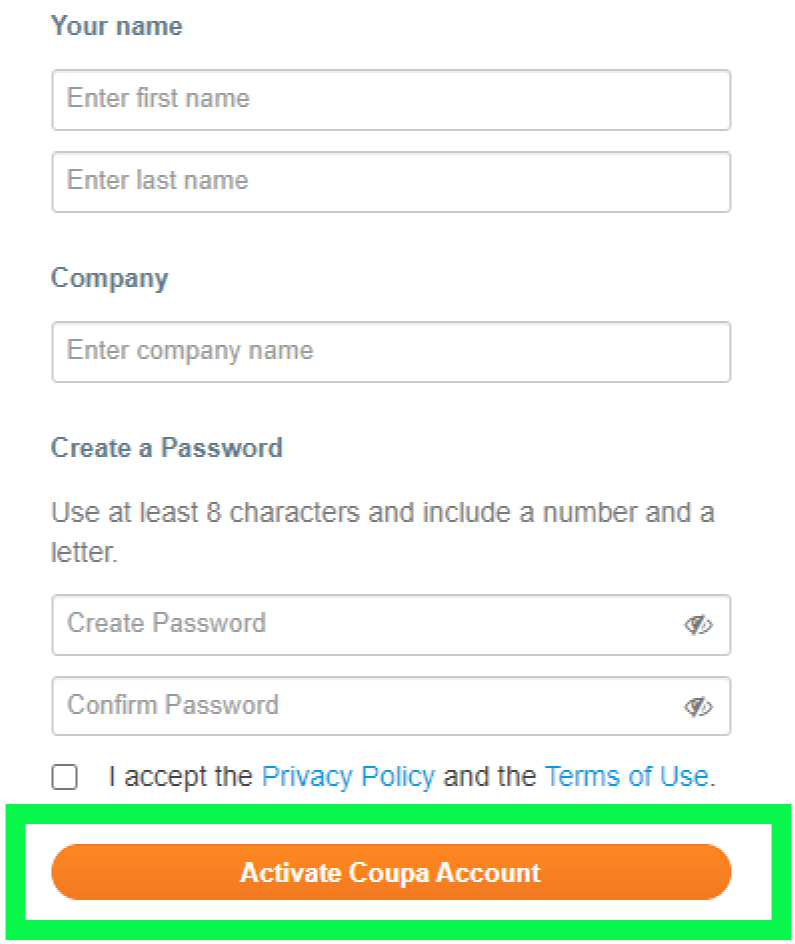


2. When you open the email, select the **"Join Coupa"** pushbutton. This will direct you to login into **Coupa Supplier Portal (CSP).**

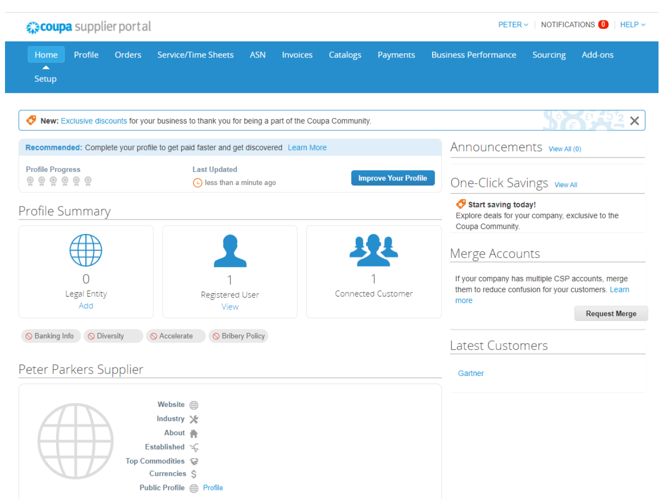


3. Fill out your information click **"I accept the Privacy Policy and the Terms of Use"** and click **"Activate Coupa Account."** You can also forward this invitation to a different user to fill out the information on your behalf.



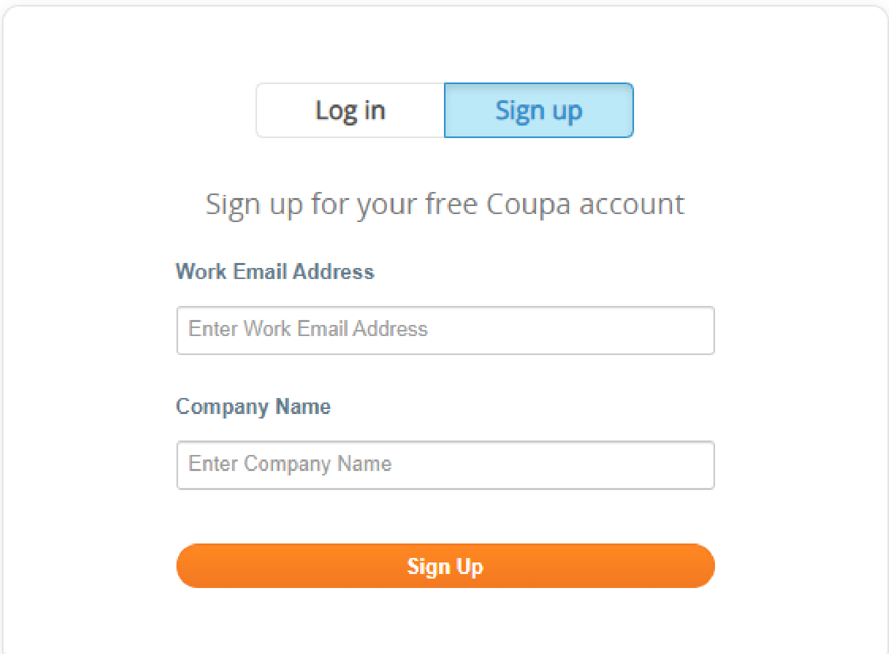


4. Once you click Activate Coupa Account, you will be directed to the Coupa Supplier Portal

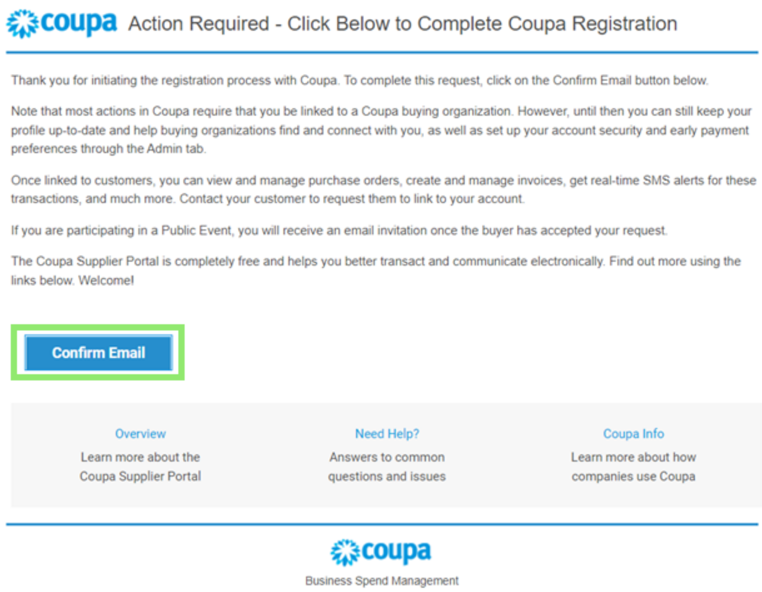


CSP Direct Sign Up

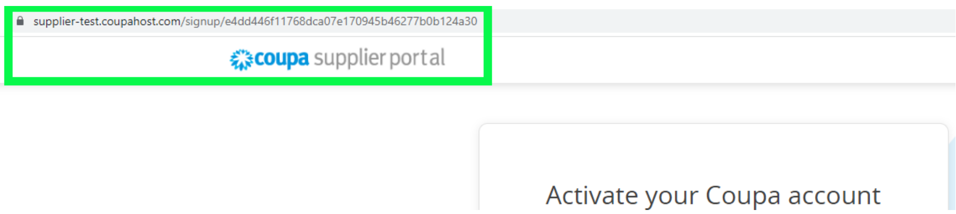
1. Begin by navigating **to www.supplier.coupahost.com** in your browser.
2. Select the ‘Sign up’ option. Enter your “**Work Email Address**” and “**Company Name**”. You will then receive an invitation to that email address to register for the CSP.
   NOTE: Once Gartner creates a record with your email address, your account will be linked with Gartner.

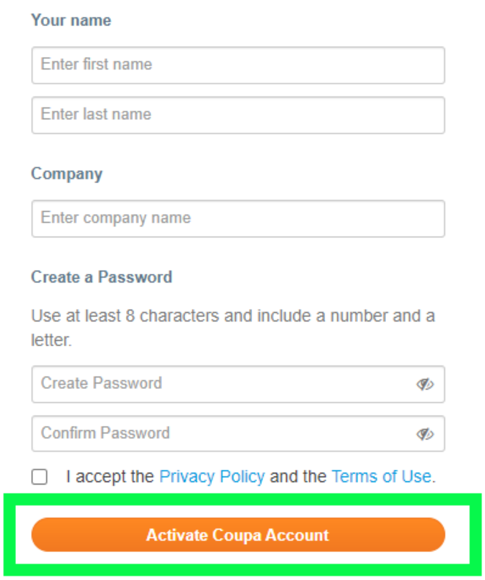


5. Once the email has been received, click the **“Confirm Email”** button to be brought into the CSP.

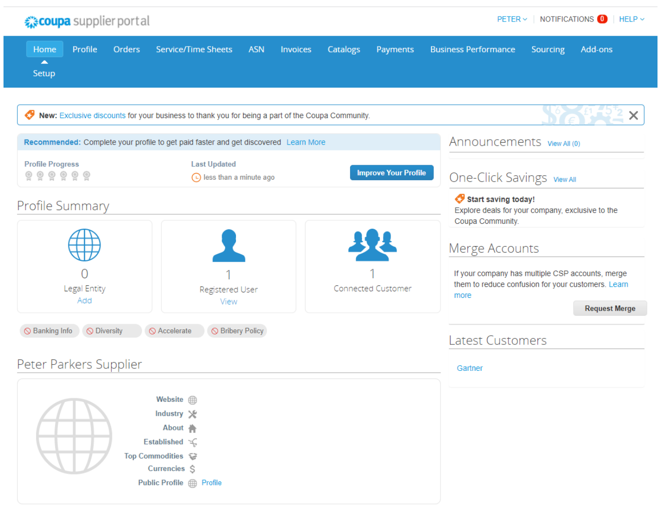


6. Fill out your information click **"I accept the Privacy Policy and the Terms of Use"** and click **"Activate Coupa Account."**



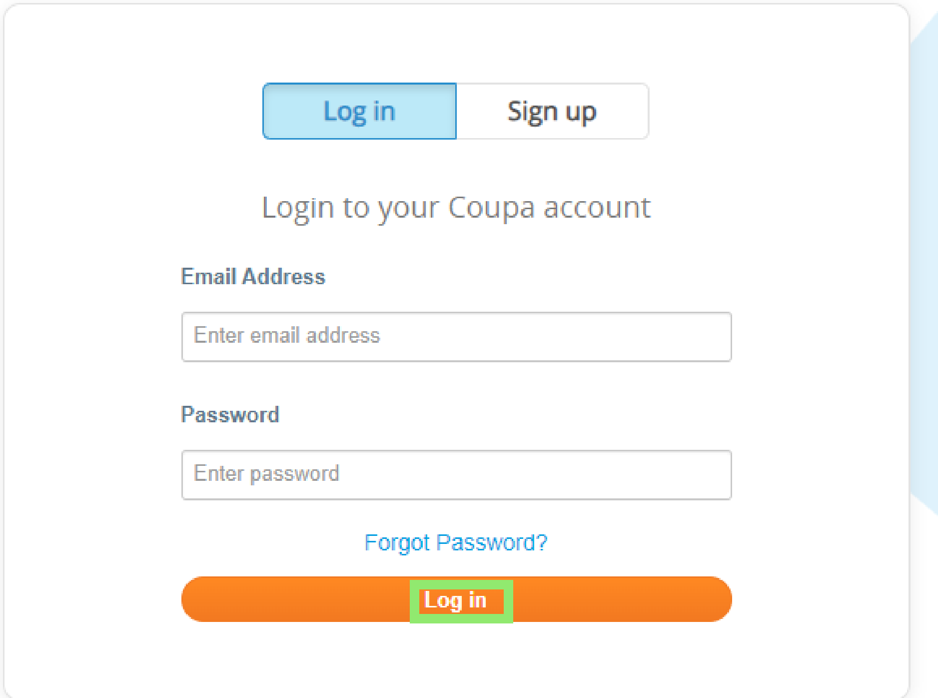


7. Once you click Activate Coupa Account, you will be directed to the Coupa Supplier Portal

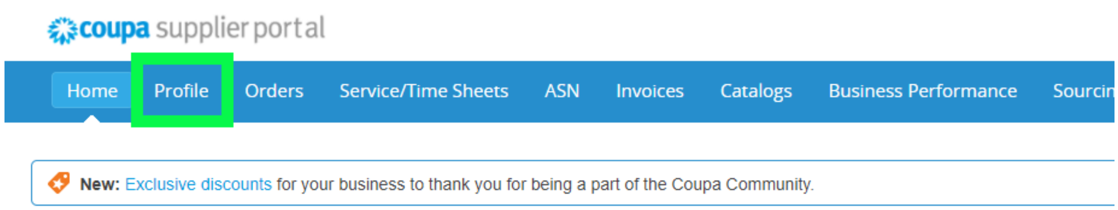


External Update Form

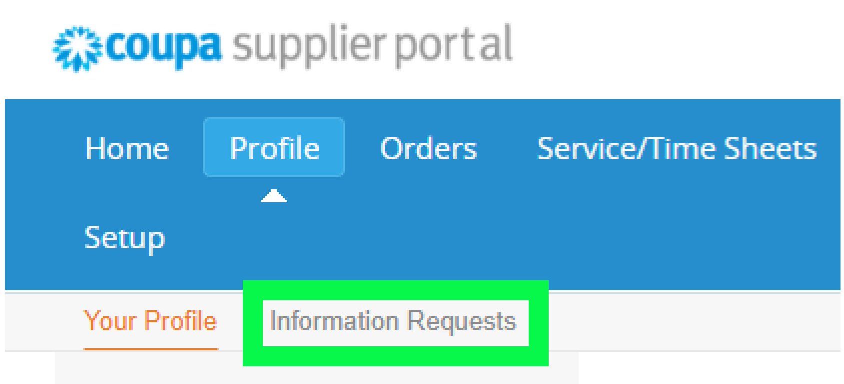
1. Begin by signing into the CSP. If you do not yet have an account, follow the account creation steps above.



8. Once logged into the CSP, click **Profile** at the top left

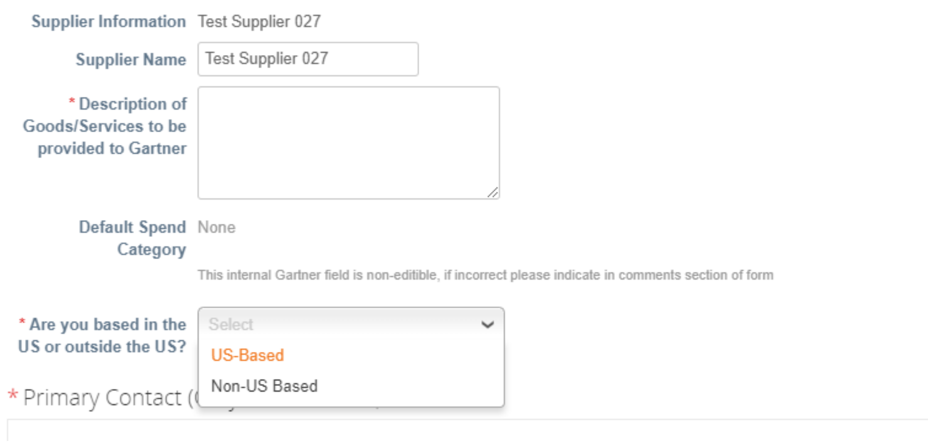


9. On the left, click **"Information Requests"**

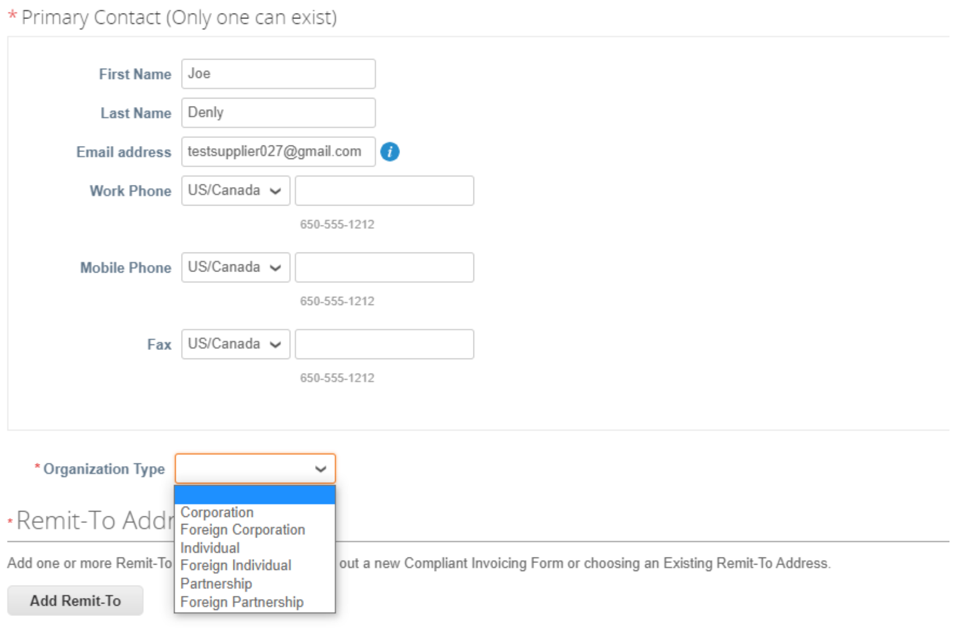


NOTE: Information Requests page will only be available if Gartner has performed the Request for Information action in Coupa

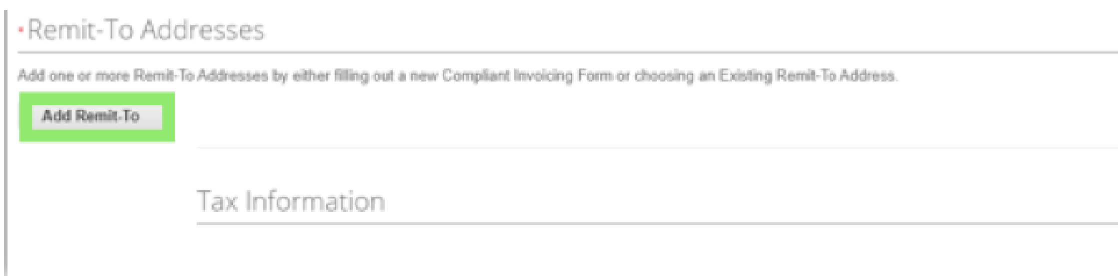
10. Complete the fields as described below:
    a. **Supplier Name:** Legal entity of the business
    b. **Description of Goods/Services to be provided to Gartner:** Detail of goods and services provided
    c. **Default Spend Category:** Internal field to Gartner. If incorrect, you can indicate in the comments section of the form
    d. **Are you based in the US or outside the US:** Select option from drop-down.



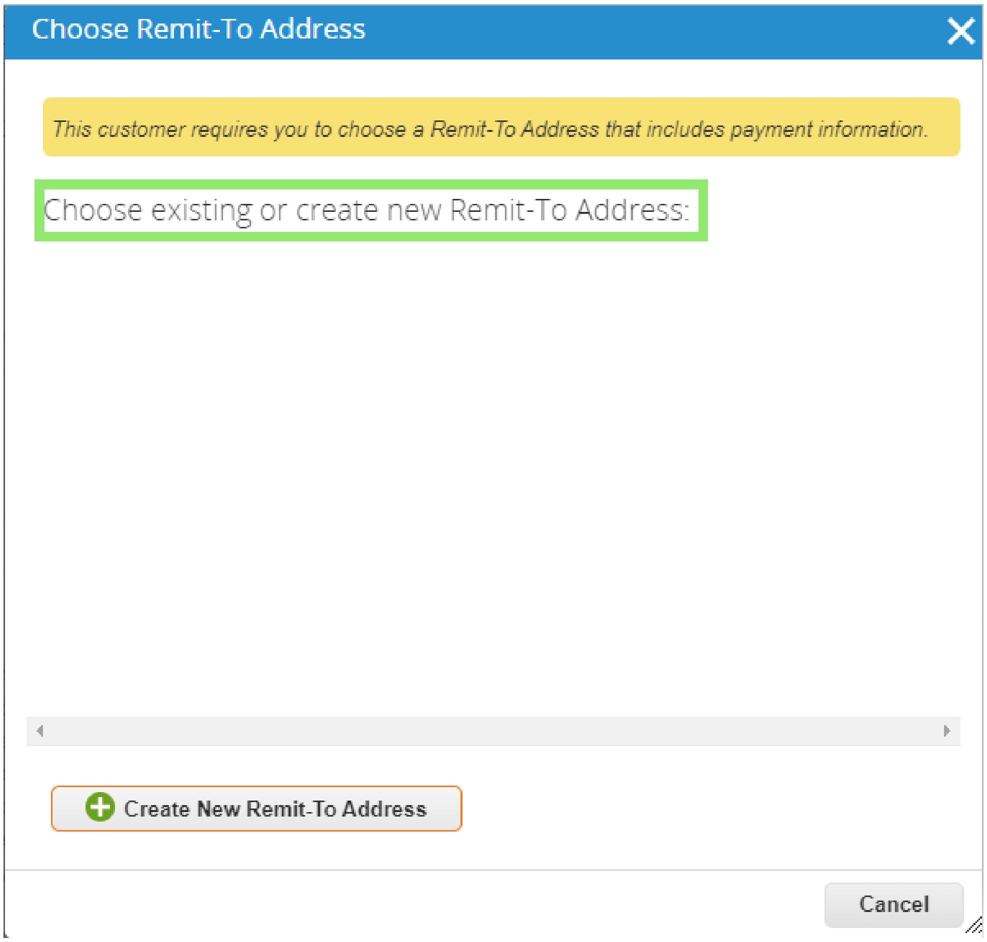
    e. **Primary Contact:** Name and Contact details pre-populates but can be edited
    f. **Organization Type**: Select company type from drop down



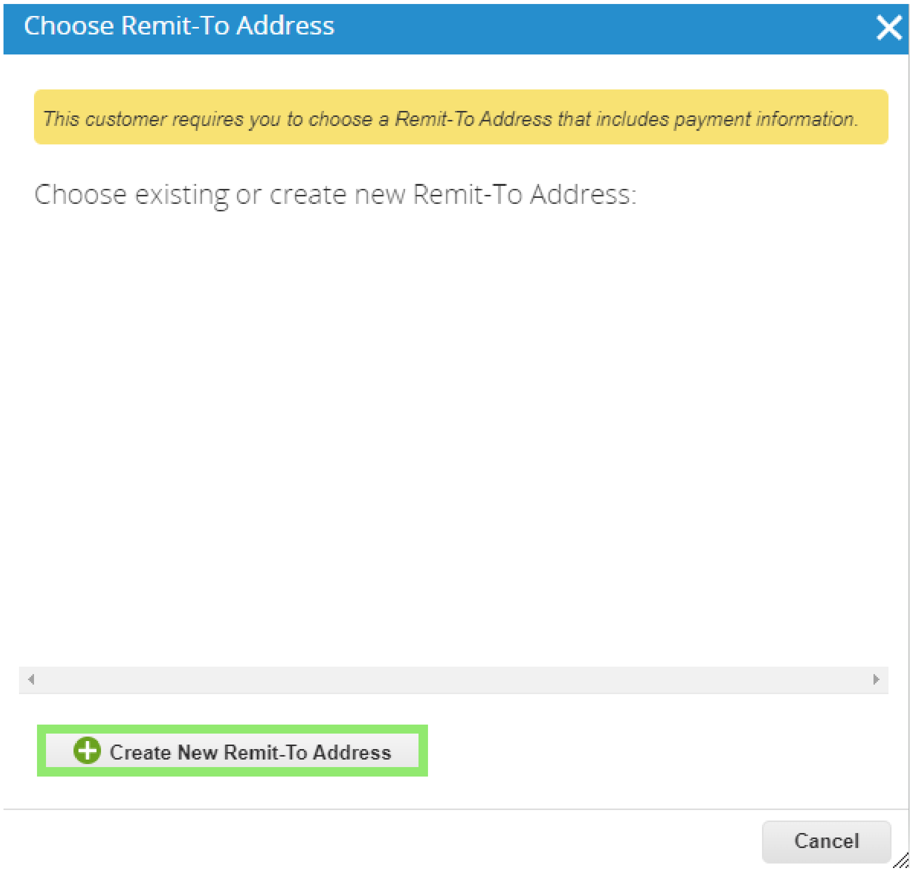
11. **Add Remit-To**: Add payment information and remittance address



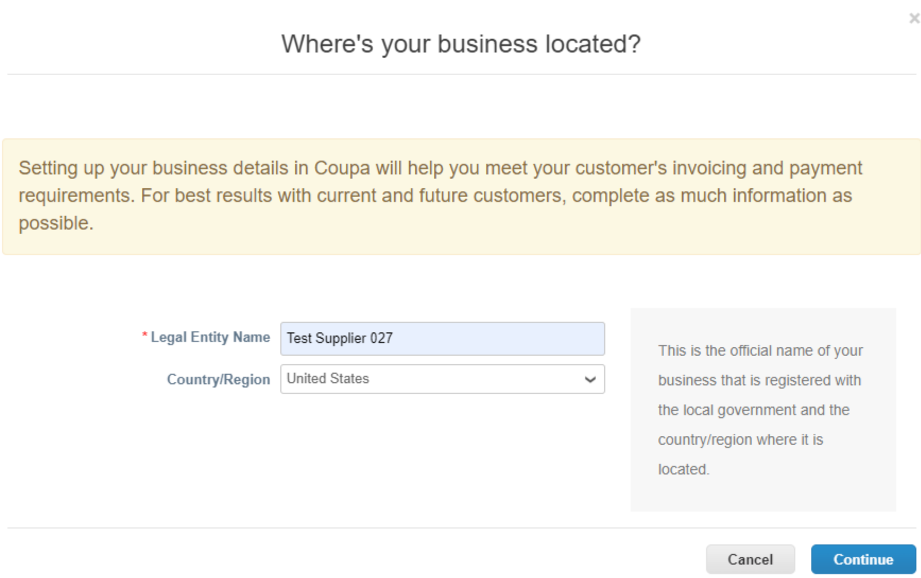
By clicking "**Add Remit-To**", you will be recommended to use the existing payment information provided during the initial set-up. If you select an existing remittance record, information that has previously been provided will be migrated to the update form.



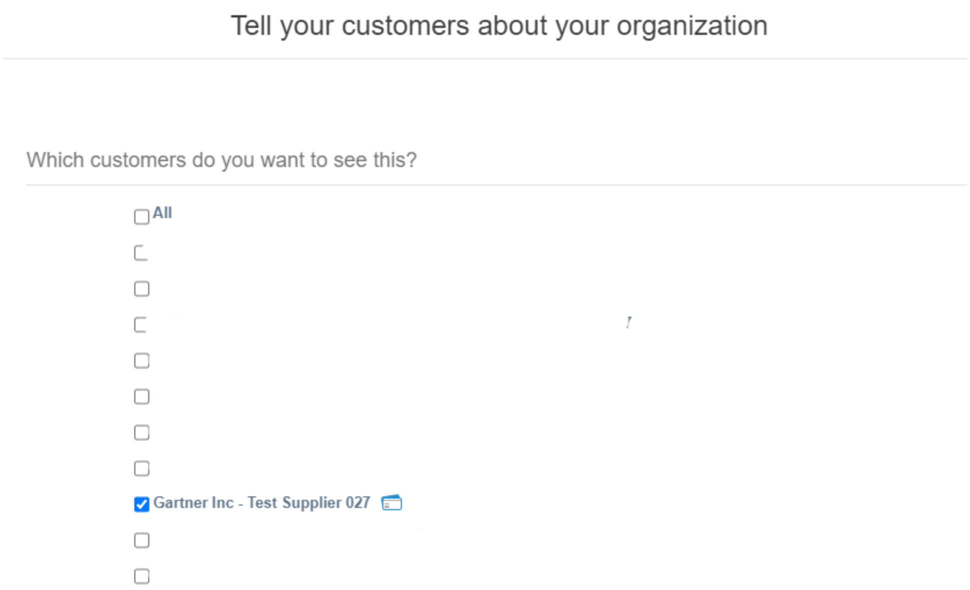
If you have previously skipped the initial onboarding setup and do not have existing legal entity information or are looking to create a new legal entity, you may select "**Create New Remit-To Address"** to add a new Legal Entity and payment information. This setup process behaves similarly to the initial onboarding setup.



If you click “Create New Remit-To Address”, a pop-up window appears where you can enter the **legal name** and **country/region** and select **“Continue”.**

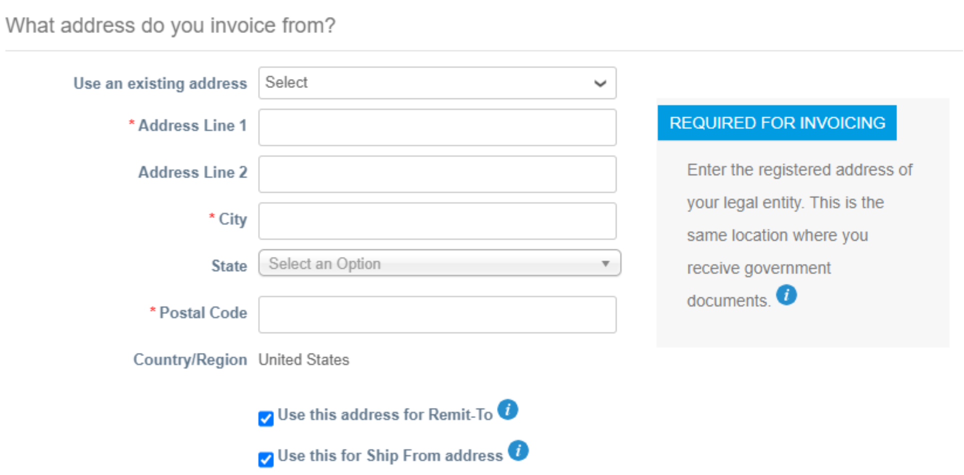


Select all or the specific customer(s) that you want to see their legal entity information.



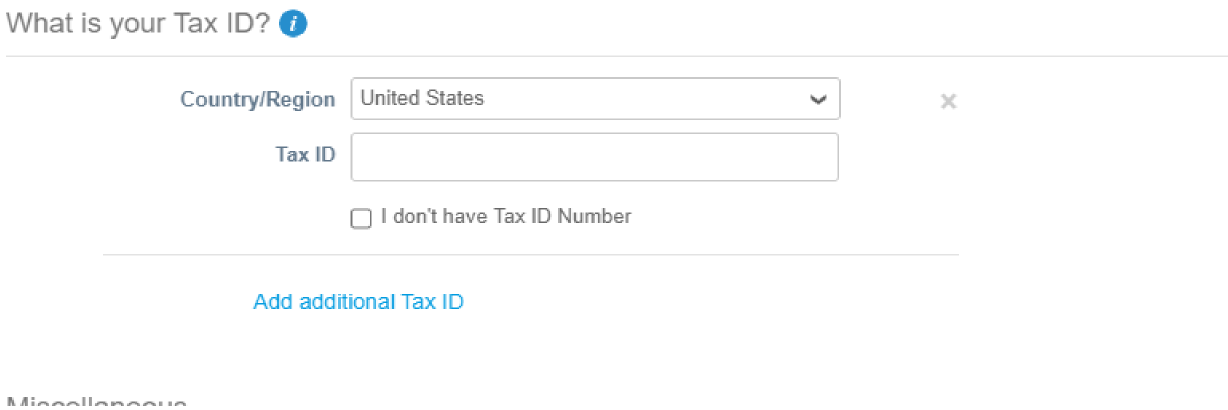
Enter Remit-To address details for invoicing. You can uncheck "**Use this address for Remit-To**" if you have more than one remit-to location or your remit -to address is different from their legal entity. Similarly, you can uncheck "**Use this for Ship from Location"** if you have more than one location or their ship-from address is different from your legal entity.

- **Address Line 1:** Allows entry of Street address line 1 of remittance address
- **Address Line 2:** Allows entry of Street address line 1 of remittance address
- **City:** Allows entry of remittance address city
- **State:** Allows entry of remittance address state/province/region
- **Postal Code:** Allows entry of remittance address postal code



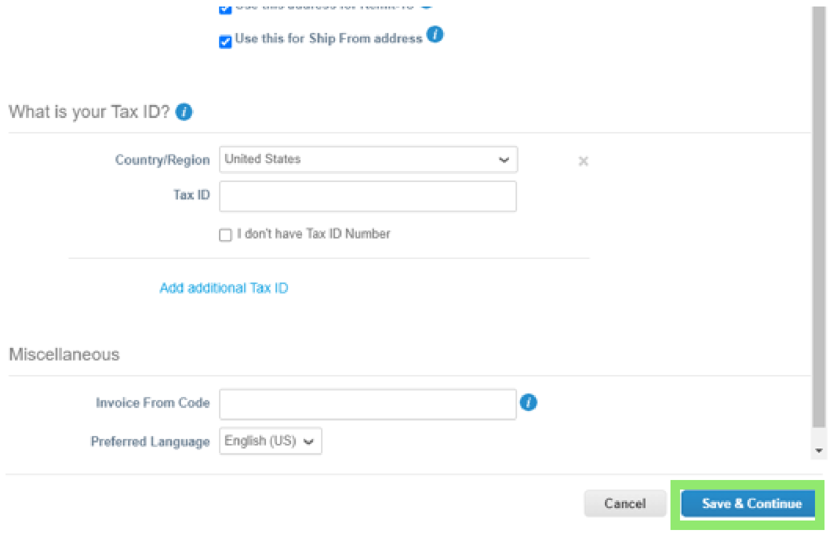
You can enter one or more (select "Add additional tax ID") formatted Tax ID (optional), according to your region of operation or can check "I don't have Tax ID Number" if you want to enter a local Tax ID.

- **Country/Region:** Select your tax country/region from the drop-down list.
- **Tax ID:** Enter the tax/VAT ID, including the prefix to the number

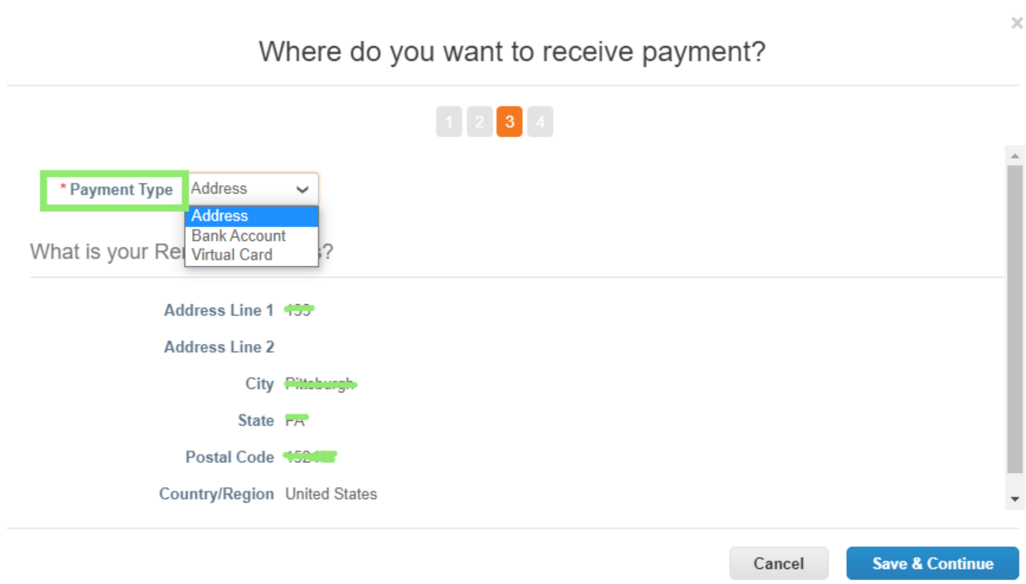


You can add "Invoice from Code" to tie your CSP invoice from address (registered address) with the corresponding address in your ERP.
Select preferred language from the drop-down list.

Supplier selects "**Save and Continue**"



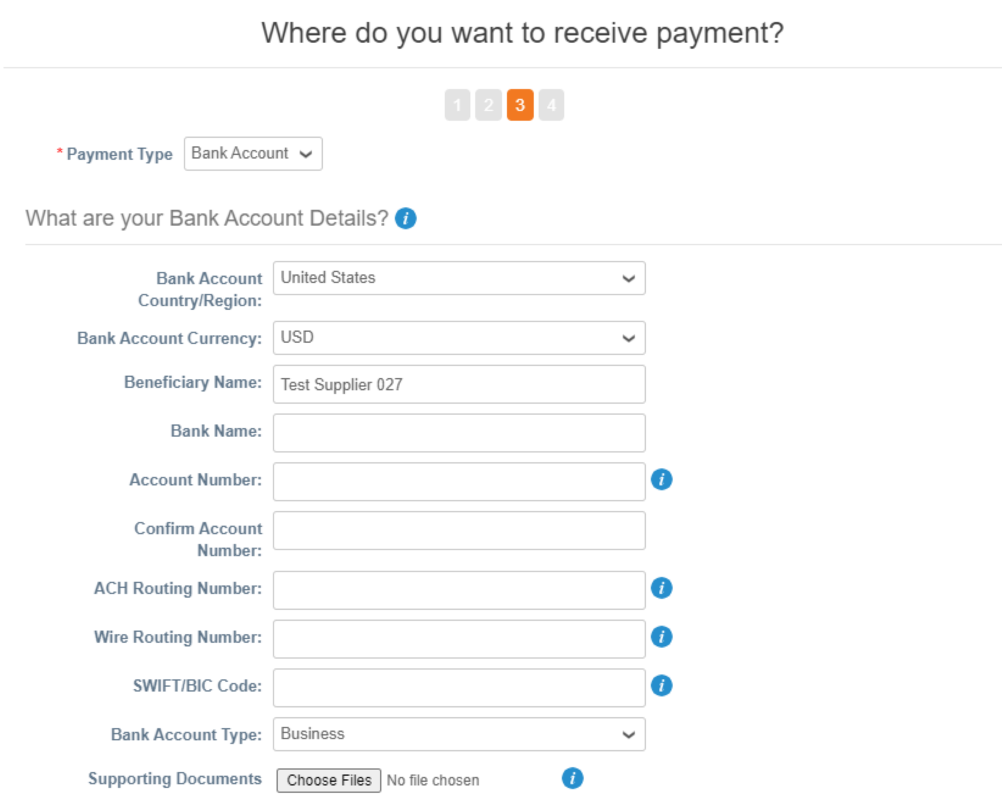
Select "**Payment Type**", where you want to receive payment. If you select "**Address**" (default option), you can continue to the next step as you already provided the address(es) on the previous page.
NOTE: This address is for check payments which is not a preferred method of payment. If selected, you will be contacted by Gartner to understand the reasoning behind the selection.



For "Bank Account" as "Payment Type":

- **Bank Account Country/Region:** Select the country from the drop-down list. By default, legal entity country/region is selected.
- **Bank Account Currency**: Select the currency from the drop-down list. By default, it is the currency of the bank account country/region.

- **Beneficiary Name**: Enter the name of the beneficiary. By default, it is the legal entity name.
- **Bank Name**: Name of bank in which supplier has account
- **Account Number**: Allows for entry of bank account number associated to remittance address
- **Confirm Account Number**: Confirm your account number by entering it again.
- **ACH Routing Number**: Allows for entry of bank routing number associated to remittance address
- **Wire Routing Number**: Allows for entry of routing number to send money from one account to another bank (Optional)
- **SWIFT/BIC Code:** Enter a string of eight or eleven characters that identify the international bank by bank code, country, location, and branch. It's also known as a Bank Identifier Code (BIC) (Optional)
- **Bank Account Type**: Allows the supplier to identify the nature of their bank account.
- **Supporting Documents**: Select Choose Files to upload up to five files (BMP, PDF, JPEG, PNG, TIFF, or GIF) that customers can use to verify banking information. If the supplier wants to replace the attachment(s) before saving, select “Choose Files” again and choose different attachments to upload, which replaces any existing attachments in the process.


Where do you want to receive payment?

1 2 3 4

* Payment Type: Bank Account

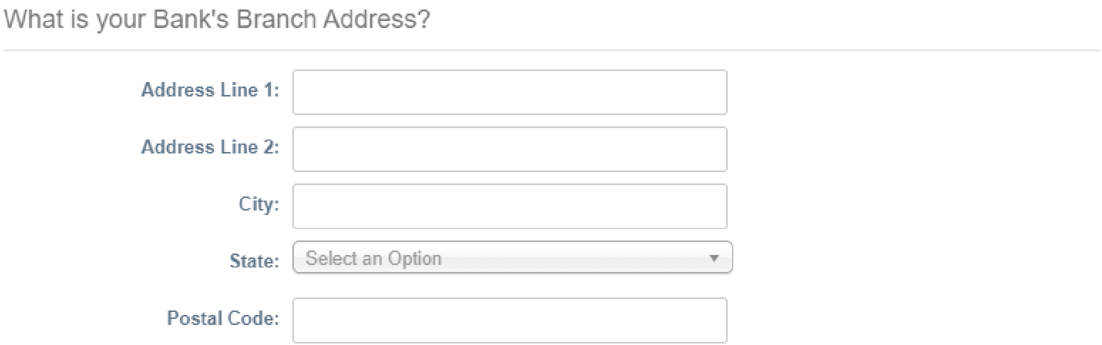
What are your Bank Account Details?

Bank Account Country/Region:	United States
Bank Account Currency:	USD
Beneficiary Name:	Test Supplier 027
Bank Name:	
Account Number:	
Confirm Account Number:	
ACH Routing Number:	
Wire Routing Number:	
SWIFT/BIC Code:	
Bank Account Type:	Business
Supporting Documents	Choose Files No file chosen

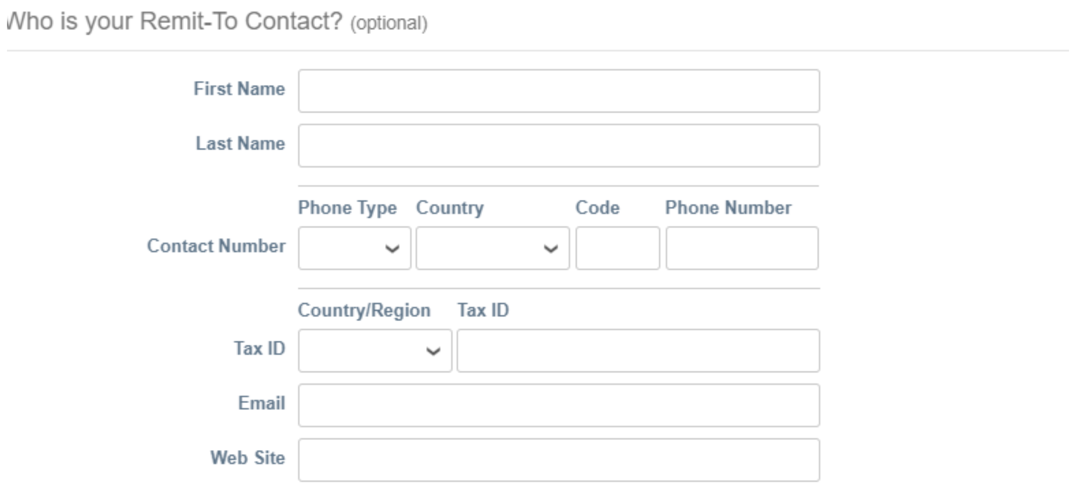
Enter the **Bank’s Branch Address** with pin code

- **Address Line 1:** Allows entry of Street address line 1 of bank
- **Address Line 2:** Allows entry of Street address line 2 of bank

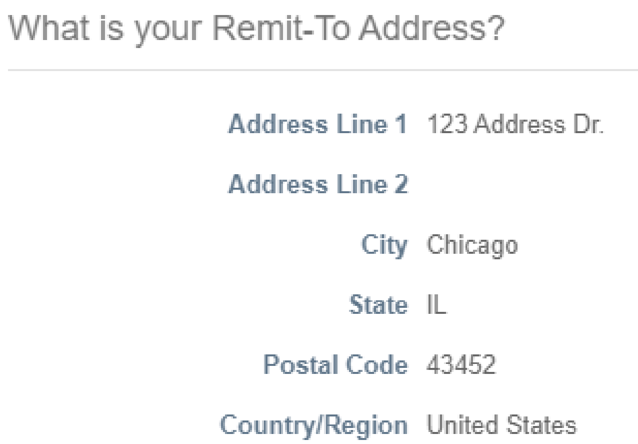
- **City:** Allows entry of bank city
- **State:** Allows entry of bank state/province/region
- **Postal Code:** Allows entry of bank postal code



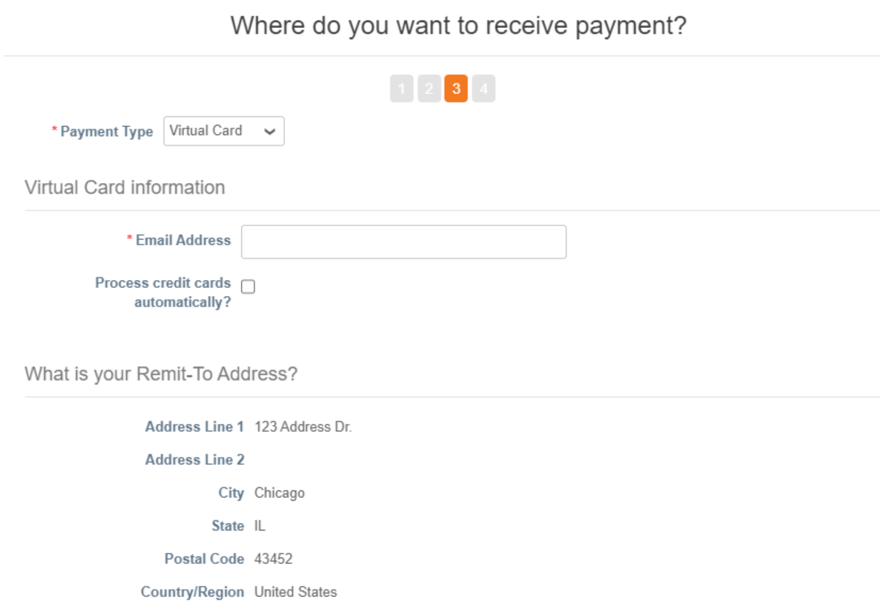
Add optional **Remit-To contact information** if applicable. If a remit-to contact is not listed for the remit-to address then the primary contact will be used as the remittance email address.



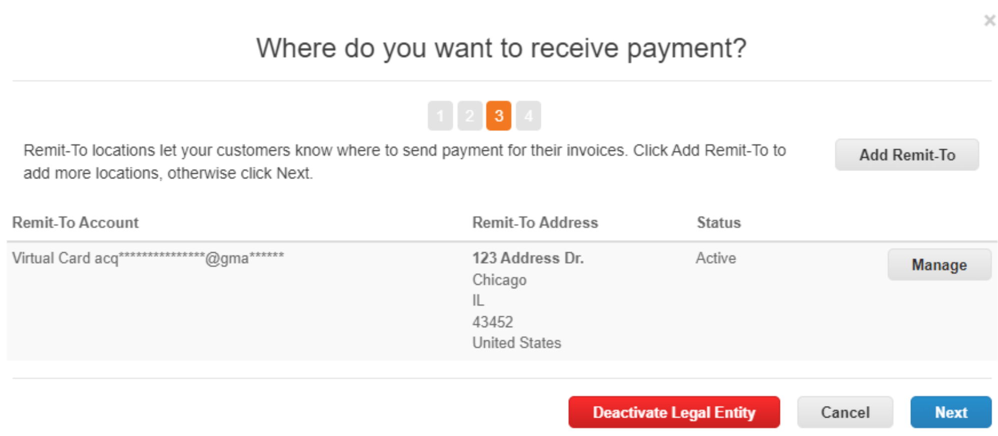
Remit – to address is prepopulated.



For "Virtual Card" as "Payment Type": enter the email address where you will receive virtual card details. NOTE: Virtual card is available in the US and Canada.

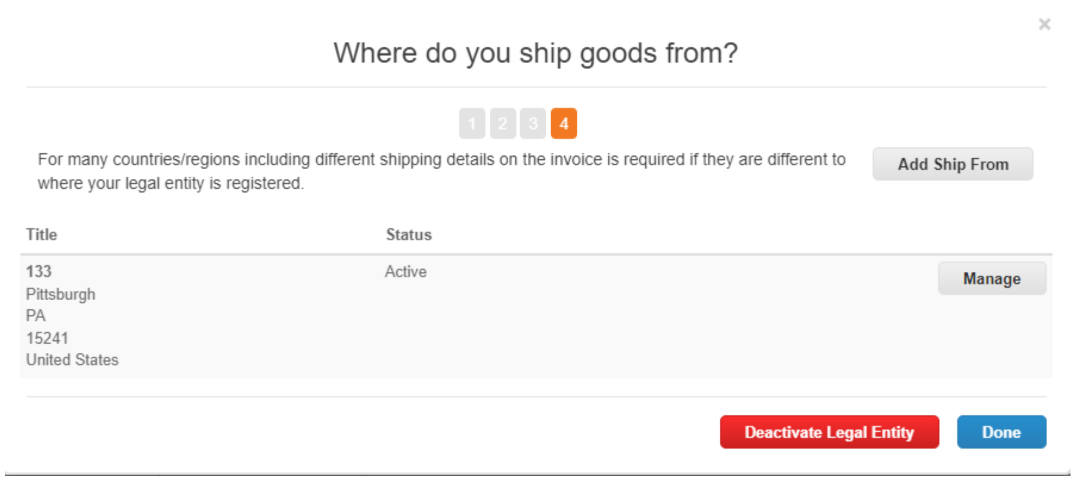


Remit to account and remit to address are pre-filled based on provided details. You can "**add remit to**" to add a new remit-to address. You can also edit details by selecting "**manage**".
You can deactivate a legal entity by selecting "**Deactivate Legal Entity**" from the Actions button or on any of the appearing windows.

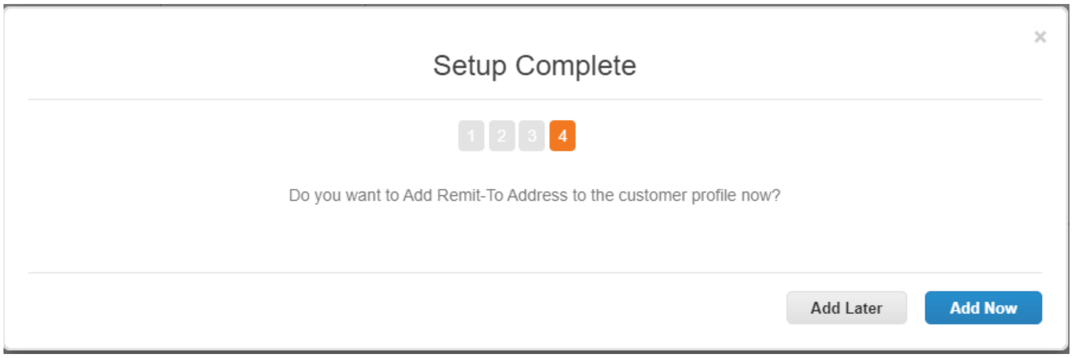


NOTE: If information such as Email Address for the Virtual Card Payment Type **is incorrectly entered** users must Deactivate that Remit-To address/Legal Entity and Fill out a new Remit-to Address

Add shipping details by selecting “**Add ship from**”.
When completed select “**Done**”.

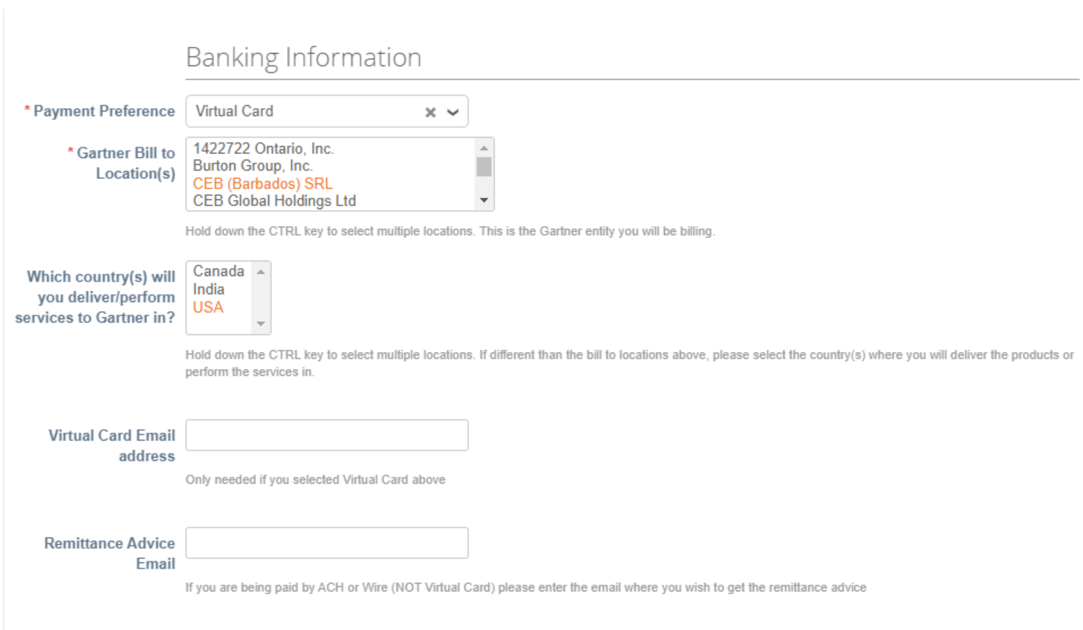


Select **“add now”** to add remit-to details to the CSP and create a Supplier Payment Account that will be put in “new” status until approved.



If Virtual Card is created: After selecting "Add now", you are navigated back to the form, where billing Address is automatically added by remit -to setup.

- **Payment Preference**: Select **Virtual card** if supplier want to add virtual card as payment type.
- **Gartner Bill to Location(s):** Select location of Gartner where your services will be invoiced
- **Which country(s) will you deliver/perform services to Gartner in?** Select where you will provide services.
- A new **Virtual Card Email address** can be added if applicable.



If Bank Account is created: After Supplier selects "Add now", they are navigated back to the form, where billing Address is automatically added by remit -to setup.

- **Payment preference**: Required field, select Electronic
- **Account Currency:** USD
- **Gartner Bill to Location(s):** Required field, select location of Gartner where your services will be invoiced
- **Which country(s) will you deliver/perform services to Gartner in?** Select where you will provide services.

- **Remittance Advice Email:** If you are being paid by ACH or Wire (NOT Virtual Card) please enter the email where you wish to get the remittance advice
- **Beneficiary Name:** Auto-defaults name on bank account
- **Bank Name:** Auto-defaults
- **Bank Account Type:** Required field, select Checking or Savings
- **Bank Account Number:** Auto-defaults
- **Bank Routing Number:** Auto-defaults
- **Is the Bank located outside the US?:** Yes/No
- **Bank Country/Region:** Auto-defaults
- **For the above bank account, please upload either a cancelled check or a bank statement validating your account information:** Allows for file upload

Banking Information

* Payment Preference: Electronic
Virtual Card
Electronic

Account Currency

* Gartner Bill to Location(s): 1422722 Ontario, Inc.
Burton Group, Inc.
CEB (Barbados) SRL
CEB Global Holdings Ltd

Hold down the CTRL key to select multiple locations. This is the Gartner entity you will be billing.

Which country(s) will you deliver/perform services to Gartner in?: Afghanistan
Albania
Algeria
American Samoa

Hold down the CTRL key to select multiple locations. If different than the bill to locations above, please select the country(s) where you will deliver the products or perform the services in.

Remittance Advice Email

If you are being paid by ACH or Wire (NOT Virtual Card) please enter the email where you wish to get the remittance advice

Beneficiary Name: New Bank

Name on Bank Account

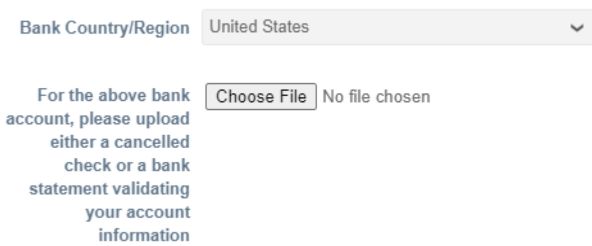
Bank Name: New Bank

* Bank Account Type

Bank Account Number: *******890

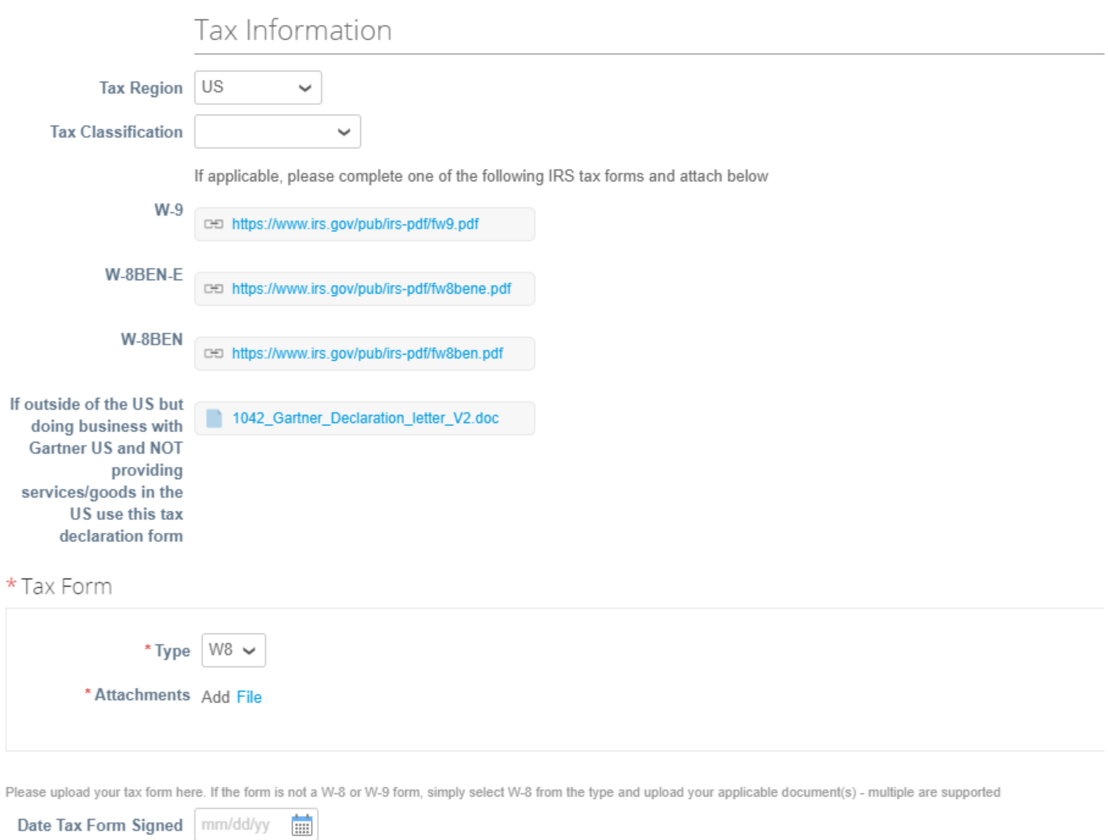
Bank Routing Number: ******505

Is the bank located outside the US? Yes / No



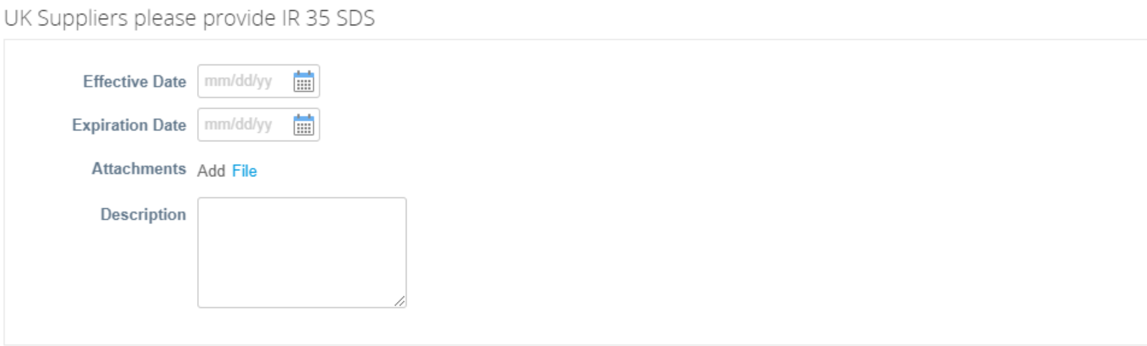
12. Once Remit-To addresses are completed, complete the rest of the Information Request form

Tax Information: If applicable, complete one of the W8 or W9 IRS tax forms and attach below under Tax Forms. This is required if doing business with Gartner US. If not submitted, your form will be rejected and sent back. Tax declaration is also acceptable as stated on the form. If you require a 1099, please select 1099 from the tax classification dropdown.

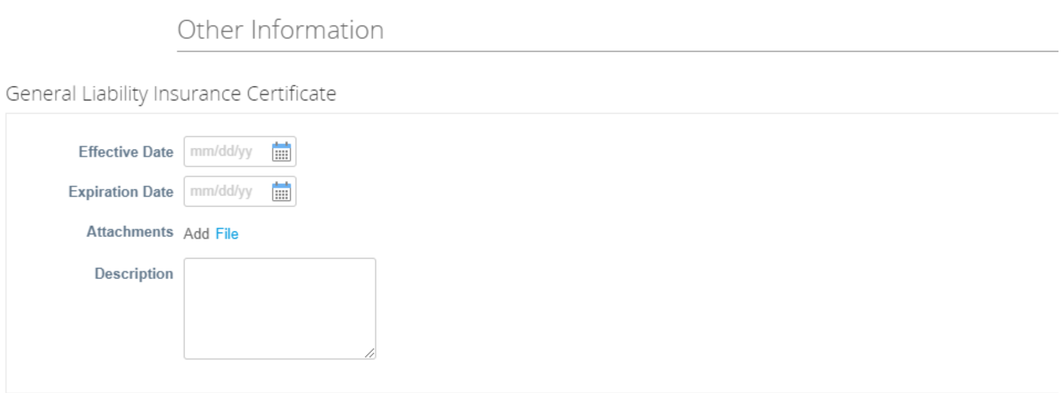


a. **UK Suppliers please provide IR 35 SDS**
   - **Effective Date** and **Expiration date:** Date range the IR 35 SDS is active during.

- **Attachments:** Evidence that the supplier holds the IR 35 SDS. This field is mandatory if any of the Diversity IR 35 CDS fields are completed.
- **Description**: Description of the IR 35 CDS.

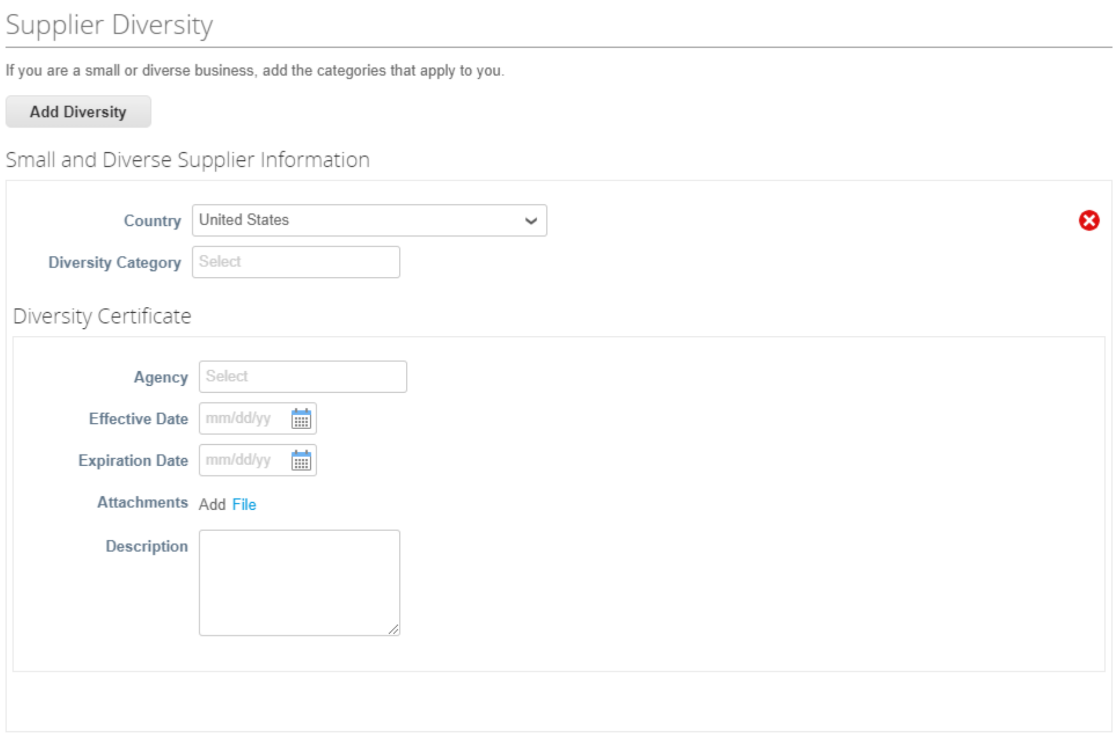


b. **General Liability Insurance Certificate**
- **Effective Date** and **Expiration date:** Date range the General Liability Insurance Certificate is active during.
- **Attachments:** Evidence that the supplier holds the certificate. This field is mandatory if any of the Diversity General Liability Insurance Certificate fields are completed.
- **Description**: Description of the General Liability Insurance Certificate.

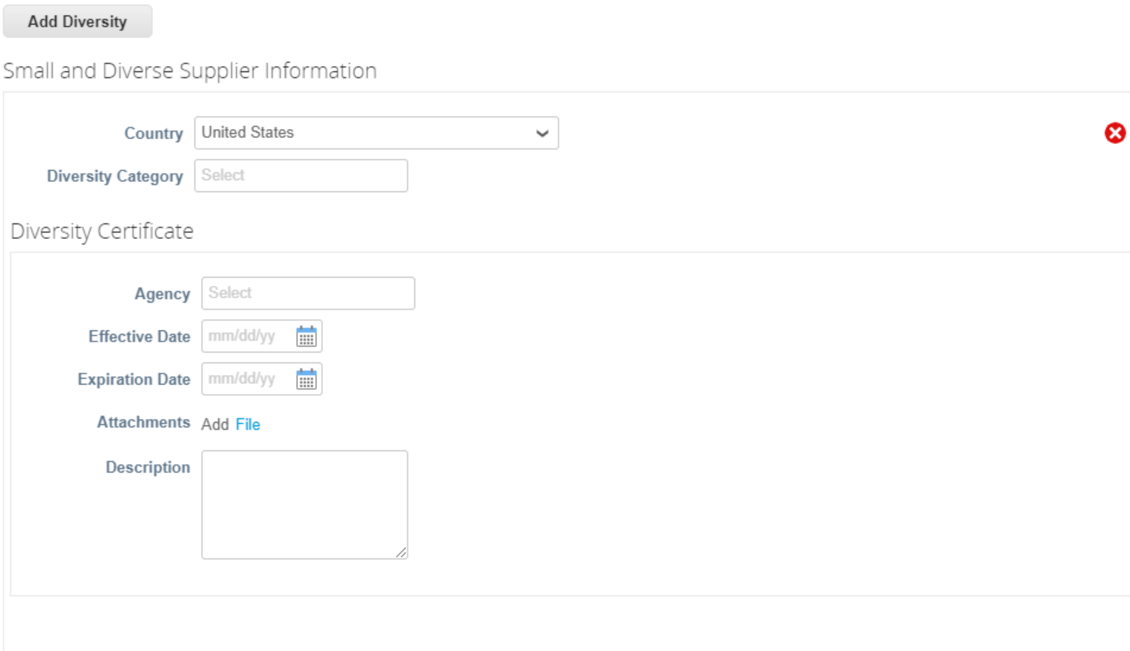


c. **Supplier Diversity**: Suppliers add the categories and attach diversity certificates.
- **Country:** Country the diversity certificate was certified in. If the supplier has diversity information in their profile, the subform pre-populates the country found in the supplier's profile.
- **Diversity Category:** Diversity certificate type. If the supplier has diversity information in their profile, the sub form prepopulates the diversity category found in the supplier's profile.
- **Agency:** Agency that approved the certification.

- **Effective Date and Expiration date:** Date range the certificate is active during.
- **Attachments:** Evidence that the supplier holds the certificate. This field is mandatory if any of the Diversity Certificate fields are completed.
- **Description**: Description of the certificate.



NOTE: Clicking **"Add Diversity"** Will populate Small and **Diverse Supplier Information and Diversity Certificate fields**. The Country field can be updated to find applicable categories for each country.


Add Diversity

Small and Diverse Supplier Information

Country: United States

Diversity Category: Select

Diversity Certificate

Agency: Select

Effective Date: mm/dd/yy

Expiration Date: mm/dd/yy

Attachments: Add File

Description:

d. **General Questions to Supplier:**

- Will you have access to any Gartner Non-Public Data?
- Will there be any integrations or network connections to Gartner systems?
- Will there be any setup or installation on Gartner systems?
- Gartner Records indicate the following: You will have access to or process any personal information:
- Please confirm whether or not you will access to or process any personal information?
- If yes to above question, select the types of personal information you will have access to?
- Do you plan to use any other entities, individuals or third parties to perform services under the proposed agreement to Gartner, or to represent Gartner?
- Will you have any interaction with government or public officials on Gartner's behalf

* Will you have access to any Gartner Non Public Data? ○ Yes ○ No

* Will there be any integrations or network connections to Gartner systems? ○ Yes ○ No

* Will there be any setup or installation on Gartner systems? ○ Yes ○ No

Gartner Records indicate the following: You will have access to or process any personal information: None

This field is read only and cannot be changed

* Please confirm whether or not you will access to or process any personal information? ○ Yes ○ No

If yes to above question, select the types of personal information you will have access to?
- Associate
- Attendee
- Client
- Prospect

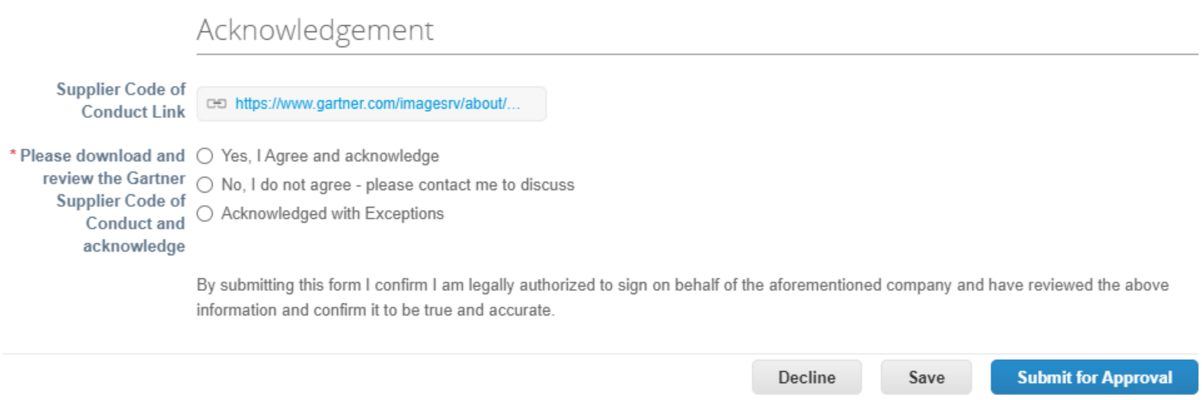
Do you plan to use any other entities, individuals or third parties to perform services under the proposed agreement to Gartner, or to represent Gartner? ☐

Check the box if the answer is yes

Will you have any interaction with government or public officials on Gartner's behalf ☐

Check the box if the answer is yes

e. Download and review the “**Gartner Supplier Code of Conduct”** before acknowledging and submitting the form for approvals. If you don’t agree to Gartner’s Supplier Code of Conduct, you should provide a copy of your own code of conduct or code of ethics that your company operates under for Gartner review.



f. To send comments to approvers, scroll to the bottom of the screen and enter the comments in the "**Comments**" field. "**Add Comment**" to add the comment to the form response.

13. Click **"Submit for Approval"** at the bottom of the page
    a. After the form is approved, details are updated in Supplier Information Record and status changes to "**Applied**" in the CSP.