

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.

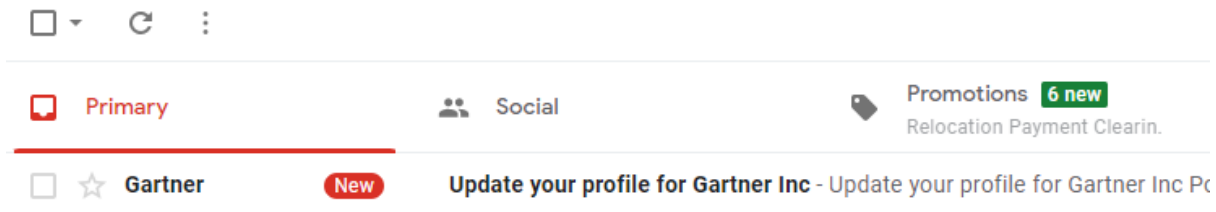
Contact for issues/support: supplierprocuretopay@gartner.com

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)**.

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Gartner Gartner Registration Instructions - Action Required

Powered by Coupa

Hello Peter Parkers Supplier,

We handle all our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.

Acquis Admin
Gartner

[Join Coupa](#)

[Forward this invitation](#)

[Overview](#)

Learn more about the
Coupa Supplier Portal

[Need Help?](#)

Answers to common
questions and issues

[Coupa Info](#)

Learn more about how
companies use Coupa



Business Spend Management

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.

supplier-test.coupahost.com/signup/e4dd446f11768dca07e170945b46277b0b124a30

supplier portal

Activate your Coupa account

Audience: Suppliers

Your name

Company

Create a Password

Use at least 8 characters and include a number and a letter.



I accept the [Privacy Policy](#) and the [Terms of Use](#).

Activate Coupa Account

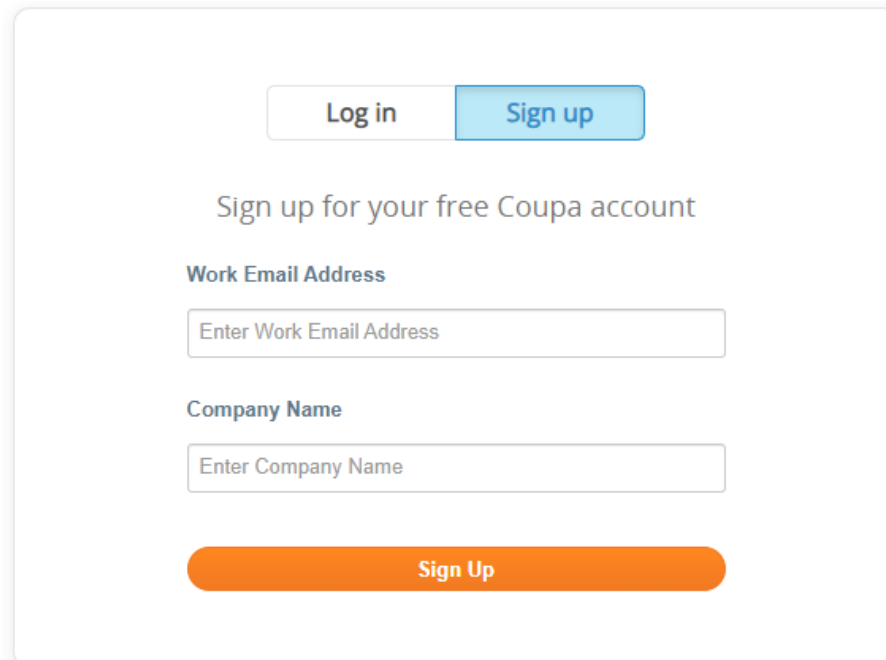
4. Once you click Activate Coupa Account, you will be directed to the Coupa Supplier Portal

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CSP Direct Sign Up

1. Begin by navigating to **www.supplier.coupa.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.



The screenshot shows a web interface for signing up for a free Coupa account. At the top, there are two buttons: "Log in" and "Sign up". Below these buttons is the heading "Sign up for your free Coupa account". Underneath, there are two input fields: "Work Email Address" and "Company Name". Each field has a placeholder text "Enter Work Email Address" and "Enter Company Name" respectively. At the bottom of the form is a large orange button labeled "Sign Up".

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

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Action Required - Click Below to Complete Coupa Registration

Thank you for initiating the registration process with Coupa. To complete this request, click on the Confirm Email button below.

Note that most actions in Coupa require that you be linked to a Coupa buying organization. However, until then you can still keep your profile up-to-date and help buying organizations find and connect with you, as well as set up your account security and early payment preferences through the Admin tab.

Once linked to customers, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more. Contact your customer to request them to link to your account.

If you are participating in a Public Event, you will receive an email invitation once the buyer has accepted your request.

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below. Welcome!

[Confirm Email](#)

[Overview](#)

Learn more about the Coupa Supplier Portal

[Need Help?](#)

Answers to common questions and issues

[Coupa Info](#)

Learn more about how companies use Coupa



Business Spend Management

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

supplier-test.coupacloud.com/signup/e4dd446f11768dca07e170945b46277b0b124a30

supplier portal

Activate your Coupa account

Audience: Suppliers

Your name

Company

Create a Password

Use at least 8 characters and include a number and a letter.

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Activate Coupa Account

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

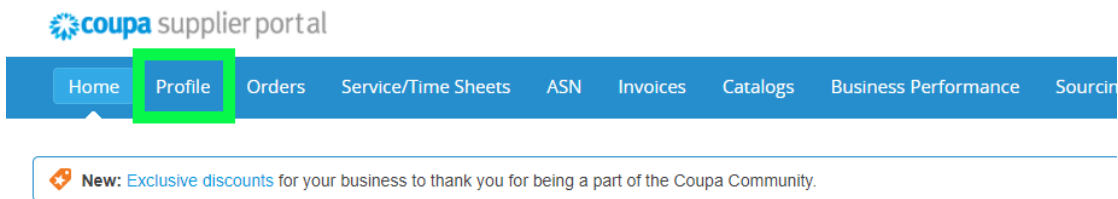
External Update Form

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

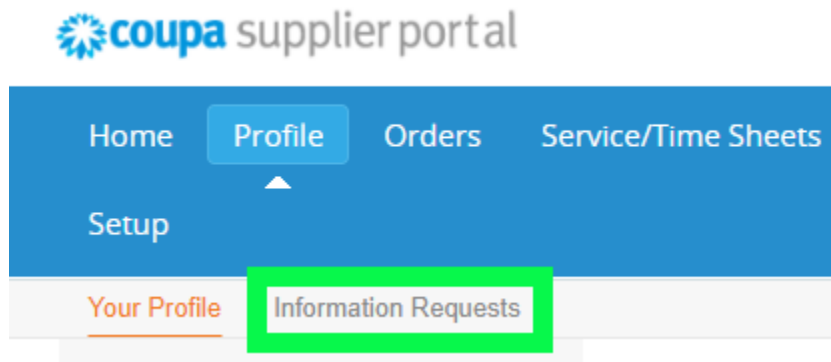
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The image shows a login form for a Coupa account. At the top, there are two buttons: "Log in" (highlighted in light blue) and "Sign up". Below these is the text "Login to your Coupa account". The form contains two input fields: "Email Address" with the placeholder text "Enter email address", and "Password" with the placeholder text "Enter password". Below the password field is a link for "Forgot Password?". At the bottom of the form is a large orange button with the text "Log in" highlighted in green.

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



9. On the left, click "Information Requests"



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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.

Supplier Information Test Supplier 027

Supplier Name

* Description of Goods/Services to be provided to Gartner

Default Spend Category None
This internal Gartner field is non-editable, if incorrect please indicate in comments section of form

* Are you based in the US or outside the US?
US-Based
Non-US Based

* Primary Contact (

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

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* Primary Contact (Only one can exist)

First Name	<input type="text" value="Joe"/>
Last Name	<input type="text" value="Denly"/>
Email address	<input type="text" value="testsupplier027@gmail.com"/>
Work Phone	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>
Mobile Phone	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>
Fax	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>

* Organization Type

* Remit-To Address

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

- Corporation
- Foreign Corporation
- Individual
- Foreign Individual
- Partnership
- Foreign Partnership

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

* Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Tax Information

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.

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Choose Remit-To Address ✕

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

◀ ▶

+ Create New Remit-To Address

Cancel

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.

Audience: Suppliers

Choose Remit-To Address ✕

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

⏪ ⏩

+ Create New Remit-To Address

Cancel

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**”.

Where's your business located? ✕

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel Continue

Audience: Suppliers

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

Tell your customers about your organization

Which customers do you want to see this?

- All
-
-
-
-
-
-
-
- Gartner Inc - Test Supplier 027
-
-

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

What address do you invoice from?

Use an existing address

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

- Use this address for Remit-To
- Use this for Ship From address

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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

What is your Tax ID?

Country/Region	United States	
Tax ID	<input type="text"/>	
<input type="checkbox"/> I don't have Tax ID Number		

[Add additional Tax ID](#)

Miscellaneous

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.

Miscellaneous

Invoice From Code	<input type="text"/>	
Preferred Language	English (US)	

Supplier selects “**Save and Continue**”

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Use this for Ship From address

What is your Tax ID?

Country/Region: United States

Tax ID:

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code:

Preferred Language: English (US)

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.

Where do you want to receive payment?

1 2 3 4

* Payment Type: Address

Address
Bank Account
Virtual Card

What is your Re...?

Address Line 1

Address Line 2

City: Pittsburgh

State: PA

Postal Code: 15201

Country/Region: United States

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.

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- **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

What are your Bank Account Details? [i](#)

Bank Account Country/Region:

Bank Account Currency:

Beneficiary Name:

Bank Name:

Account Number: [i](#)

Confirm Account Number:

ACH Routing Number: [i](#)

Wire Routing Number: [i](#)

SWIFT/BIC Code: [i](#)

Bank Account Type:

Supporting Documents No file chosen [i](#)

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

Audience: Suppliers

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

What is your Bank's Branch Address?

Address Line 1:

Address Line 2:

City:

State:

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.

Who is your Remit-To Contact? (optional)

First Name

Last Name

	Phone Type	Country	Code	Phone Number
Contact Number	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text"/>	<input type="text"/>

	Country/Region	Tax ID
Tax ID	<input type="text" value="v"/>	<input type="text"/>

Email

Web Site

Remit – to address is prepopulated.

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What is your Remit-To Address?

Address Line 1 123 Address Dr.

Address Line 2

City Chicago

State IL

Postal Code 43452

Country/Region United States

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.

Where do you want to receive payment?

1 2 3 4

* Payment Type Virtual Card

Virtual Card information

* Email Address

Process credit cards automatically?

What is your Remit-To Address?

Address Line 1 123 Address Dr.

Address Line 2

City Chicago

State IL

Postal Code 43452

Country/Region United States

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.

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Where do you want to receive payment? ×

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
Virtual Card acq*****@gma*****	123 Address Dr. Chicago IL 43452 United States	Active	Manage

Deactivate Legal Entity Cancel Next

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”**.

Where do you ship goods from? ×

1 2 3 4

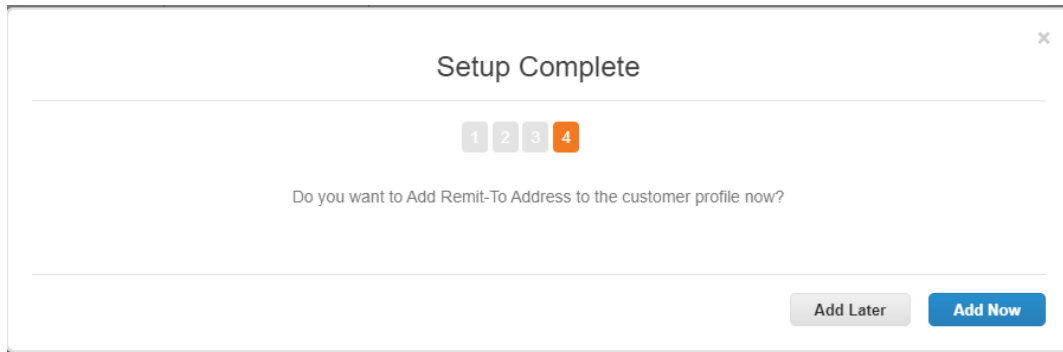
For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
133 Pittsburgh PA 15241 United States	Active	Manage

Deactivate Legal Entity 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.

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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.

Banking Information

* Payment Preference x v

* Gartner Bill to Location(s) ^ v

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? ^ v

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.

Virtual Card Email address

Only needed if you selected Virtual Card above

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

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.

Audience: Suppliers

- **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 x v

Account Currency

* Gartner Bill to Location(s)

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?

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

Name on Bank Account

Bank Name

* Bank Account Type

Bank Account Number

Bank Routing Number

Is the bank located outside the US? Yes No

Audience: Suppliers

Bank Country/Region

For the above bank account, please upload either a cancelled check or a bank statement validating your account information

No file chosen

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.

Tax Information

Tax Region

Tax Classification

If applicable, please complete one of the following IRS tax forms and attach below

W-9

W-8BEN-E

W-8BEN

If outside of the US but doing business with Gartner US and NOT providing services/goods in the US use this tax declaration form

* Tax Form

* Type

* Attachments

Please upload your tax form here. If the form is not a W-8 or W-9 form, simply select W-8 from the type and upload your applicable document(s) - multiple are supported

Date Tax Form Signed


a. UK Suppliers please provide IR 35 SDS


- **Effective Date and Expiration date:** Date range the IR 35 SDS is active during.

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- **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.

UK Suppliers please provide IR 35 SDS

Effective Date 

Expiration Date 

Attachments [Add File](#)


Description


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.

Other Information

General Liability Insurance Certificate

Effective Date 

Expiration Date 

Attachments [Add File](#)

Description

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.

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- **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.

Supplier Diversity

If you are a small or diverse business, add the categories that apply to you.

Add Diversity

Small and Diverse Supplier Information

Country ✖

Diversity Category

Diversity Certificate

Agency

Effective Date

Expiration Date

Attachments [Add File](#)

Description

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.

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Add Diversity


Small and Diverse Supplier Information


Country ✖

Diversity Category

Diversity Certificate

Agency

Effective Date 

Expiration Date 

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

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

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

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

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

This field is read only and cannot be changed

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

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.

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Acknowledgement

Supplier Code of Conduct Link

- * Please download and review the Gartner Supplier Code of Conduct and acknowledge
- Yes, I Agree and acknowledge
 - No, I do not agree - please contact me to discuss
 - Acknowledged with Exceptions

By submitting this form I confirm I am legally authorized to sign on behalf of the aforementioned company and have reviewed the above information and confirm it to be true and accurate.

Decline

Save

Submit for Approval

- 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.

Comments

Mute Comments ▾

Enter Comment

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

Add Comment

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.