

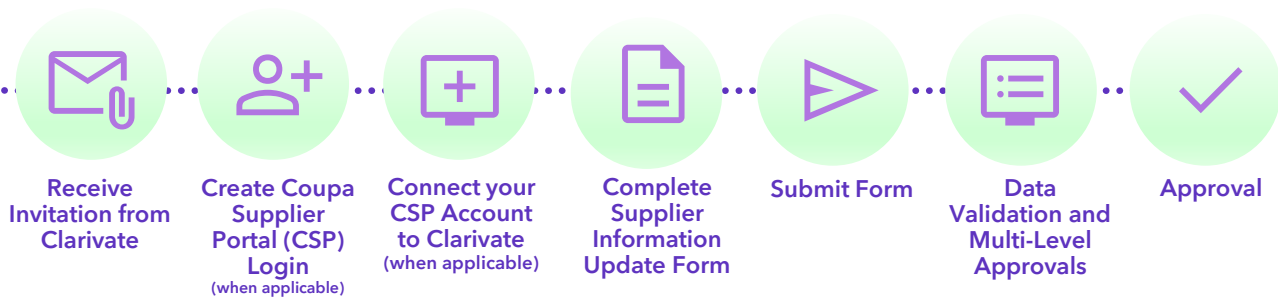
Supplier Guide to Coupa Supplier Form

Thank you for being a valued Clarivate supplier. This guide will walk you through updating your Supplier information in Coupa via our External Update Form. It is important to complete the supplier form upon receipt to ensure timely onboarding to commence our business relationship.

For issues/support: Clarivate.Vendor.Master@Clarivate.com

Steps to a Successful Supplier Onboarding

Let us guide you through a successful update to your company's information



Email from Coupa will come from the following email:
Coupa Supplier Portal do_not_reply@supplier.coupahost.com

Supplier Guide to Coupa Supplier Form

1. You've received an email from Clarivate, choose:
Join and Respond - best for recurring, repetitive suppliers. Join the Coupa Supplier Portal and connect with Clarivate and other customers.
Or Respond without Joining - Ideal for one-time or smaller suppliers. Submit your information without creating a Coupa account

Profile Information Request [Inbox x](#)



Coupa Supplier Portal <do_not_reply@supplier.coupahost.com>

Fri, Oct 18, 2024, 10:10 PM ☆ ☺ ↶ ⋮

Powered by 



Profile Information Request

Dear Prospective Supplier,

Clarivate has partnered with Coupa, to enhance the way we work together. We're excited to invite you to join us on this secure, user-friendly

Why Join Coupa's Supplier Portal (CSP)?

- **Completely Free:** There's no cost to join or use the platform.
- **Easy Setup:** Get started in minutes with our simple onboarding process.
- **Improved Efficiency:** Communicate with us and manage purchase orders, in one place.
- **Enhanced Communication:** Receive real-time updates, SMS alerts, and track your transactions effortlessly.

Your Benefits Include:

- A secure, centralized portal to update and manage your company's profile.
- The ability to connect with Clarivate and other organizations using Coupa for seamless collaboration.
- Quick access to resources like purchase order details, and invoice statuses.

Get Started in 2 Simple Steps:

1: You've received an email from Clarivate, select **button**:

- **Join and Respond** - Join the Coupa Supplier Portal where you become a part of the Coupa community with other potential customers. Best choice for re-occurring suppliers with Clarivate.
- **Respond without Joining** - enter your information for Clarivate business, without joining the Coupa community. Best choice for one-time suppliers with Clarivate. Does not require the supplier to enter into Multi-Factor Authentication (MFA)

Need Help?
Go to our supplier support site <https://clarivate.com/legal-center/supplier-support/> to learn more. For detailed assistance, refer to our [FAQ Guide](#). If you encounter any issues, feel free to reach out to us at Supplier.Enablement@Clarivate.com.
I agree.

Join today to unlock all the benefits of Coupa and ensure smooth, efficient transactions with Clarivate.
We appreciate your prompt action and look forward to collaborating with you on Coupa!

Join and Respond

Respond Without Joining


Business Spend Management

2. Login with **registered email**, Click **Continue**

 supplier portal Secure

Login

* Email

Continue

New to Coupa? [CREATE AN ACCOUNT](#)

[Forgot your password?](#)

Supplier Guide to Coupa Supplier Form

3. Once logged into the CSP, and on the Coupa home screen, click **Business Profile** at the top left, then **Legal Entities**. If you already have a legal entity within Coupa, you will see the Legal Entity under the **"Legal Entities"** tab. If not, then it will remain blank.

coupa supplier portal

CLARIVATE | NOTIFICATIONS 1 | HELP

Home Invoices Orders **Business Profile** Setup Service Sheets ASN Sourcing Forecasts Catalogs Community More...

Business Profile **Legal Entities** Information Requests Performance Evaluation Subscriptions

Legal Entities

Create

Search

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
EMAIL NOTIFI...	street 12345 test, New York, NJ, 546738, United States	UM:675689376	Check	street 12345 test, New York, NJ, 546738, United States	Clarivate
			Virtual Card	Cla*****@gma*****	Clarivate
			Bank Account	BANK OF AMERICA *****7895	Clarivate

Supplier Guide to Coupa Supplier Form

4. If no Legal Entity is present, enter your company information under **“Create” Legal Entity**

 supplier portal ELEVEN ▾ NOTIFICATIONS 17 HELP ▾

[Home](#) [Invoices](#) [Orders](#) [Business Profile](#) [Payments](#) [Setup](#) [Service Sheets](#) [ASN](#) [Sourcing](#) [Forecasts](#) [Catalogs](#) [More...](#)

[Business Profile](#) [Legal Entities](#) [Information Requests](#) [Performance Evaluation](#)

Legal Entities

[Create](#)  

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
No legal entity found. Please create a legal entity					

Create Legal Entity

×

* Legal Entity Name

* Country/Region

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region

* Address Line 1

Address Line 2

* City

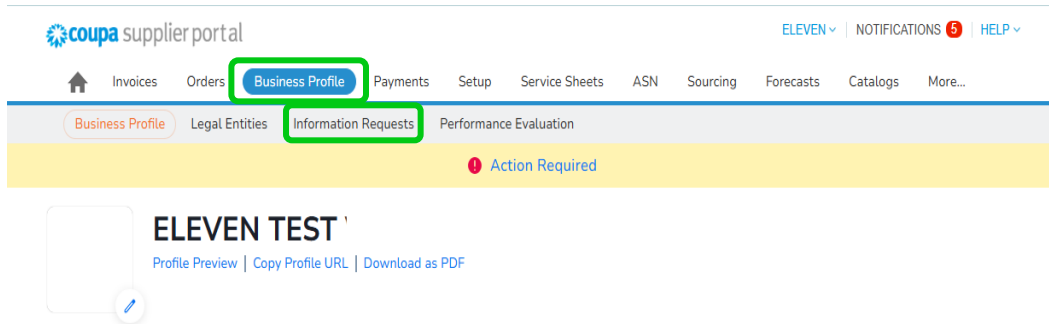
* State

* Postal Code

Invoice From Code ⓘ

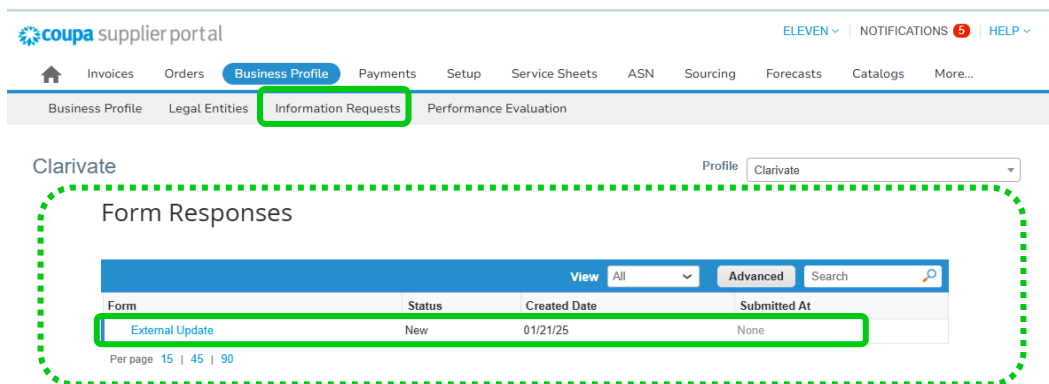
Supplier Guide to Coupa Supplier Form

- Once logged into the CSP, and on the Coupa home screen, click **Business Profile** at the top left, then **Information Request**



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

- On the Coupa home screen, click **Business Profile** at the top left, then **Information Request**, you will see a response form from Clarivate. Click **External Update Form** to input your pertinent business information.



Supplier Guide to Coupa Supplier Form

7. Populate your full business address (* mandatory fields):

Type

Individual

Organization

Primary Address

Invoice

Purchase

Bill

Other Address

Service Center

Warehouse

*** Supplier Legal Entity Name**

ELEVEN TEST VENDOR

Business Name/Disregarded Entity

If different from legal entity name

*** Type**

Type

*** PO Email**

*** Primary Address**

Address Purpose

Select Some Options

*** Region**

Country/Region

United States

State Region

None

State ISO Code

Supplier's legal name must match your tax ID

Enter if DBA is used or reported

Select the supplier type base upon company profile

Enter email address for the recipient of Clarivate POs

Select the appropriate invoice mailing address

Enter supplier country of origin doing business with Clarivate

Enter supplier's State or Region or Province

Enter supplier's State ISO Code **if applicable**

Supplier Guide to Coupa Supplier Form

7. (cont.) If you have additional company addresses such as Invoice Address or Ship From Address, enter below:

Note: Please follow your country's address standard formatting

Address Name

Enter invoice or ship-from address name

* Street Address

Enter Street Address * **Mandatory**

Street Address 2

If applicable

Street Address 3

If applicable

Street Address 4

If applicable

* City

Enter City * **Mandatory**

* Postal Code

Enter Postal Code * **Mandatory**

Location Code

If applicable

Supplier Guide to Coupa Supplier Form

7. (cont.) Applicable to **INDIA SUPPLIERS ONLY**

Are you located in India and doing business with any of the following legal entities?

☒ Yes

☐ No

- 8001 - Clarivate Analytics India Private Limited
- 8002 - LONGBOW LEGAL SERVICES PRIVATE LIMITED
- 8003 - DRG Analytics and Insights Pvt. Ltd.
- 8005 - CPA Global Support Services India Pvt Ltd

If you have a Lower TDS certificate, please email Clarivate.vendor.master@clarivate.com with the subject 'Lower TDS Certificate' to enter your Lower TDS certification and ensure your Lower TDS rate is applied correctly.

E-Invoice Required?

☐

Check for E-Invoicing

If you are required to submit an E-Invoice, check this box.

PAN Number

Enter or Update PAN Number

Reason for Exemption

If applicable, enter exemption

MSME Registration Number

Enter MSME Registration Number

MSME Certification

Choose File

No file chosen

Upload MSME Certificate INDIA vendor

Supplier Guide to Coupa Supplier Form

7. (cont.) Populate supplier information **primary and additional contacts:**

- Please ensure this is updated to your company's **Finance** contact
- Suppliers must have First Name populated
- Suppliers must have Last Name populated
- Suppliers must have Email Address populated

• Primary Contact

First Name → Enter contact First Name * **Mandatory**

Last Name → Enter contact Last Name * **Mandatory**

Email address → Enter Contact Email * **Mandatory**

Work Phone → Enter contact telephone number

Mobile Phone → If applicable

Fax → If applicable

Additional Contacts

Contact Purpose *i*

First Name

Last Name

Email address *i*

Work Phone

Enter additional contact such as sales, accounting, diversity, sustainability, etc.

Supplier Guide to Coupa Supplier Form

8. **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.



Then **Add Payment Method:**

How would you like to be paid?

All Methods

Bank Transfers

Checks

Credit Cards

Clarivate supports Credit Cards, Bank Transfers, Checks Payments.

Add Payment Method

9. A pop-up window will appear, after clicking **Enable Multi Factor Authentication**, you will be taken outside of this form. You will need to come back to this form after completing the **Multi Factor Authentication** step:

Multi Factor Authentication or Confirmation needs before you can access this feature.

Please click below link that will open a new tab to enable or confirm Multi Factor Authentication.

Once you enable or confirm Multi Factor Authentication please revisit to this page again

Waiting for Multi Factor Authentication or Confirmation...

Enable Multi Factor Authentication

Supplier Guide to Coupa Supplier Form

10. Multi Factor Authentication via App requires you to **scan QR code** to enter into the authentication app, you will receive a 6- digit code to enter, click enable.

Multi Factor Authentication via App

1

Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device.
[Learn more](#)
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal



TBGUILC32TQCUIPKASTMK
F6QV4XSOKP2
Click to copy Security Key

2

Enter the 6-digit verification code from your device.

Cancel

Enable

Copy/Download/Print codes to use at a later time:

Save Your Backup Codes

These codes were generated on January 21, 2025

Emergency Recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

GW1kXw	De6Dcw
ZazVNWw	3hStAw
zyNH2w	7kzzcQ

Copy

Download

Print

Supplier Guide to Coupa Supplier Form

11. Select **"Add Remit-To"**, and **"Add Payment Method."**

*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.

Add Remit-To

How would you like to be paid?

All Methods

Bank Transfers

Checks

Credit Cards

Clarivate supports Credit Cards, Bank Transfers, Checks Payments.

Add Payment Method

Credit Cards

Bank Transfers

Checks

Currently, there are no valid accounts available for your selection

Supplier Guide to Coupa Supplier Form

12. Enter banking information for payment method.

Add Payment Method

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * State

* Bank Account Currency

Beneficiary Name

Bank Name

Account Number ⓘ

Confirm Account Number

ACH Routing Number ⓘ

Wire Routing Number ⓘ

☐ My company expects international payments

Branch Code

Bank Account Type

Email Address ⓘ

Remit-To Code ⓘ

Supplier Guide to Coupa Supplier Form

- Once you have selected **"Add Remit-To"**, select **"Address"** (default option), to continue to the next step.

***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.

Add Remit-To → Click Add Remit To (populate supplier banking details) City ***Mandatory**

***Banking and Remittance Information**

Active
Active → Select **active** to update latest banking details. Note: Inactive means DNU (Do Not Use) banking details from Invoice

***Payment Type**
Select → Select **Electronic** for payment type

If you need to set up a Remit-To via check or direct debit reach out to your business contact. If you have permission email Clarivate.Vendor.Master@clarivate.com.

***Select what business(es) should be linked to this payment type**
Select Some Options → Select Clarivate business legal entity doing business

***Is this Remit-To being set up for a payment method in India?**
Select → Select **Yes** to update latest banking details. Note: Inactive means DNU (Do Not Use) banking details from Invoice

***GST Liabilities**
Do not check if GST reverse charge is applicable.

***GSTIN #**

***Street Address**
Enter Bank Street Information

***Select what business(es) should be linked to this payment type**
Clarivate
Innovative
MEDIA LAB LLC
PROQUEST CHILE
PROQUEST COLOMBIA
PROQUEST INFORMATION & LEARNING LTD (UK)
PROQUEST LLC (US)
PROQUEST MEXICO OPERATING

Supplier Guide to Coupa Supplier Form

14. Populate **Banking Information:**

* Street Address

Bank street address ***Mandatory**

Street Address 2

If applicable

* City

Bank City ***Mandatory**

* Region

Country/Region

Bank Country ***Mandatory**

State Region

Bank Region ***Mandatory**

State ISO Code

State ISO Code

* Postal Code

Bank Postal Code ***Mandatory**

* Remit To Contact Email



Supplier Remittance email ***Mandatory**

Beneficiary Name in English

Supplier name in **English only**

Local Language Beneficiary Name

Supplier name in **Local Language** e.g., China

Bank Name in English

Bank name in **English only**

Local Language Bank Name

Bank name in **Local Language** e.g., China

* Bank Country/Region

Bank Country ***Mandatory**

Supplier Guide to Coupa Supplier Form

14. (cont). **Banking Information:**

Bank Address

Enter Bank Address

Bank City

Enter Bank City / Region

Bank Postal Code

Enter Bank Postal code /Zip Code

Bank State or Region

Enter Bank State / Region

* Payment Currency

Choose Payment Currency

Bank Account Number



Enter Supplier Bank Account Number **only**

- For Sweden, enter Giro number.
- For Argentina, enter CBU Number.
- For Mexico, enter CLABE.

Bank Routing Number



Enter Bank Routing Number e.g., ACH /ABA Routing number for USA Country

IBAN Number



Enter IBAN Number for all European Countries

SWIFT Code (BIC)



Enter SWIFT Code / BIC Code for European Countries

Bank Code



Enter Bank Code e.g., China, Japan

- For China, enter CNAPS Code.

Branch Code

Enter Branch Code E.g., China, Japan

BSB Number



Enter BSB Code like Australia

Supplier Guide to Coupa Supplier Form

14. (cont). **Banking Information:**

IFSC Code



Enter IFSC Code **India ONLY**

Israel Bank Branch Number

Enter for **Israel Banking ONLY**

Wire Routing Number



Enter only Wires ABA routing number, e.g., USA

Bank Account Type

Select Saving/ Checking Account **Japan ONLY**

For Japan Bank Accounts Only.

Do you have an intermediary bank tied to this payment method?

- ☐ Yes
☐ No

Select Option only when it is an Intermediary Bank Information

Pay Group

Internal **Clarivate Use ONLY**

For internal Clarivate use only

Supplier Guide to Coupa Supplier Form

15. Populate **Tax Information**:

Tax Information

DUNS Number



Enter supplier DUNS Number **(if applicable)**

Will you be providing goods or services to Clarivate in the US?

- ☐ Yes
☐ No

* Tax Classification

US Suppliers, select the Tax Class from the supplier's W9 Form

Are you providing a W-8?

☐

If you are a supplier outside of the US and providing services to a Clarivate US legal entity, W8 is required.

* Federal Tax Form

* Type

Please attach W8 or W9 as required

* Attachments

Add [File](#)

Supplier Guide to Coupa Supplier Form

16. Add **Supplier Diversity** information:

Supplier Diversity

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

Add Diversity

Click Add if you are certified Diverse Supplier under a Certifying Agency

Supplier Diversity

Country

United States

Diversity Category

Select

Diversity Certificate

Agency

Select

Select Certifying Agency

Effective Date

mm/dd/yy

Expiration Date

mm/dd/yy

Provide Certification Dates

Attachments

Add File

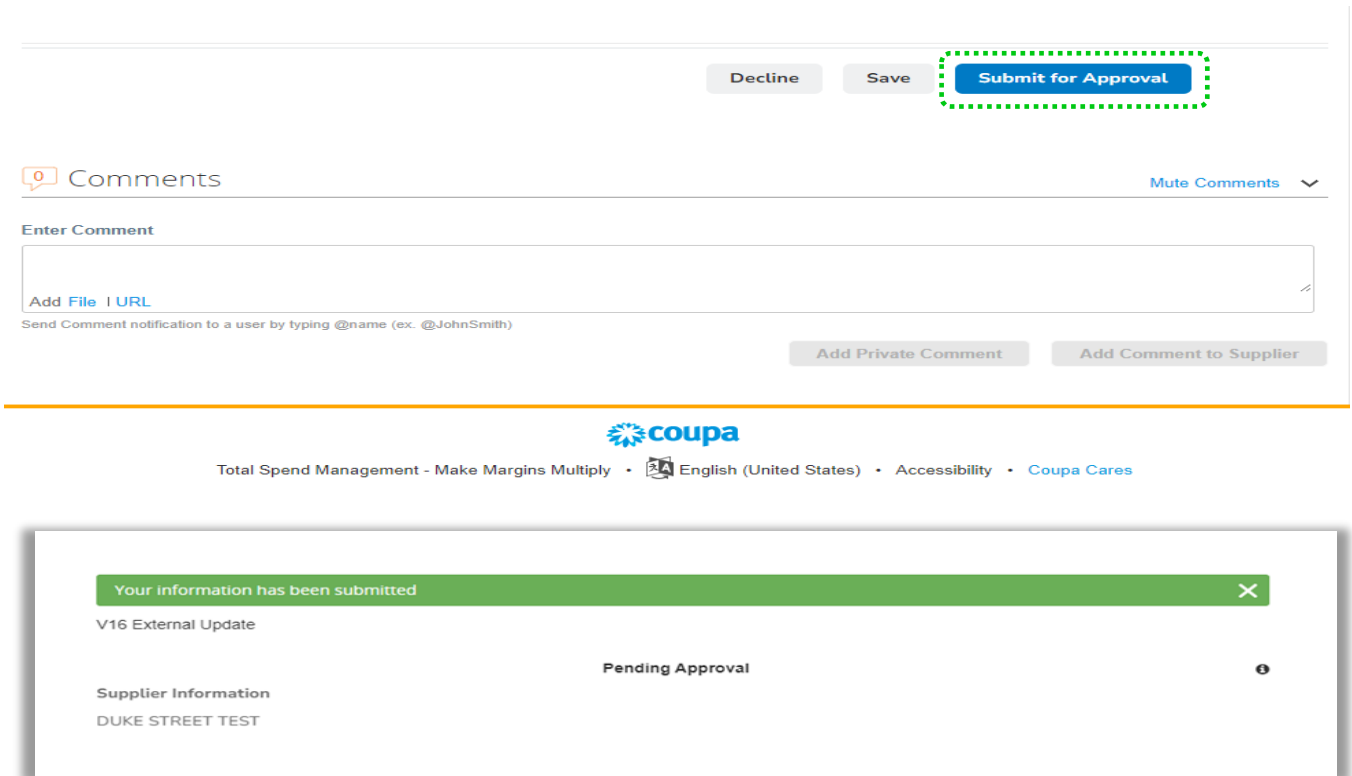
Any diverse suppliers without certification attachment will be asked to resubmit the update form with documentation attached

Description

Enter any additional comments on diversity that are applicable

Supplier Guide to Coupa Supplier Form

17. Submit for Approval:



Decline Save **Submit for Approval**

Comments [Mute Comments](#) ▼

Enter Comment

Add File | URL

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

Add Private Comment Add Comment to Supplier

 Total Spend Management - Make Margins Multiply •  English (United States) • Accessibility • [Coupa Cares](#)

Your information has been submitted ✕

V16 External Update

Pending Approval ⓘ

Supplier Information

DUKE STREET TEST

For **Submission:**

- **Comments:** Provide any comments for the Clarivate
- **Submit:** **Until you click the "Submit for Approval" button, the form will remain in the draft status**
- **Pending Approval:** Upon clicking "Submit for Approval", a pop-up notification will appear showing your information has been submitted and is now pending approval with Clarivate.