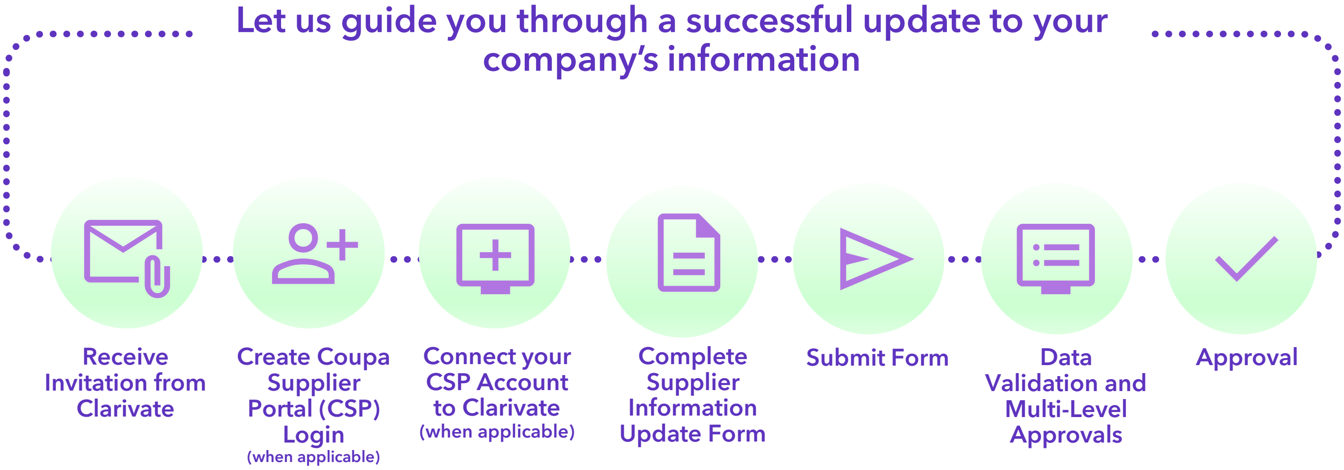
Supplier Guide to Coupa Supplier Form

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

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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

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

Fri, Oct 18, 2024, 10:10 PM

Powered by coupa

Clarivate

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)

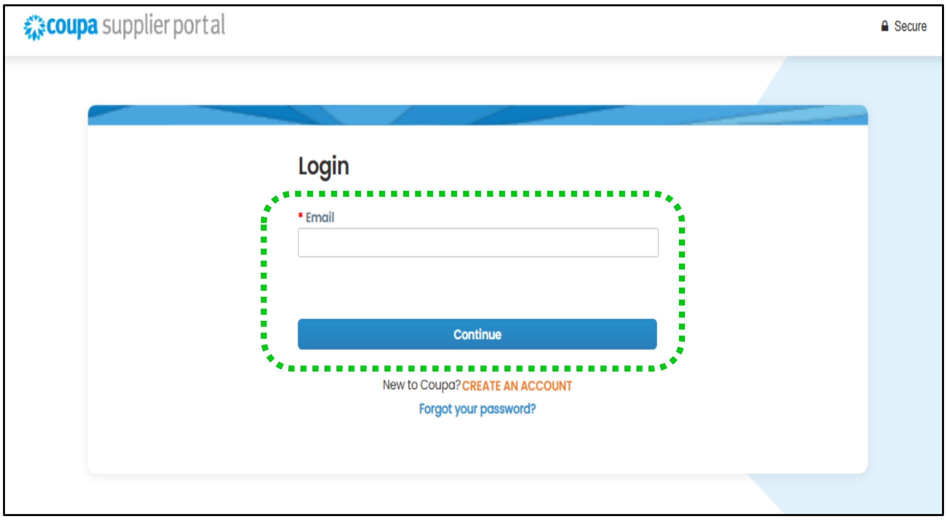
Need Help?
Go to our supplier support site **https://clarivate.com/legal-center/supplier-support/** to learn more. For detailed assistance, refer to our **FAQ Guide** . If you encounter any issues, feel free to reach out to us at **Supplier.Enablement@Clarivate.com**.
I agree.

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

coupa
Business Spend Management

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



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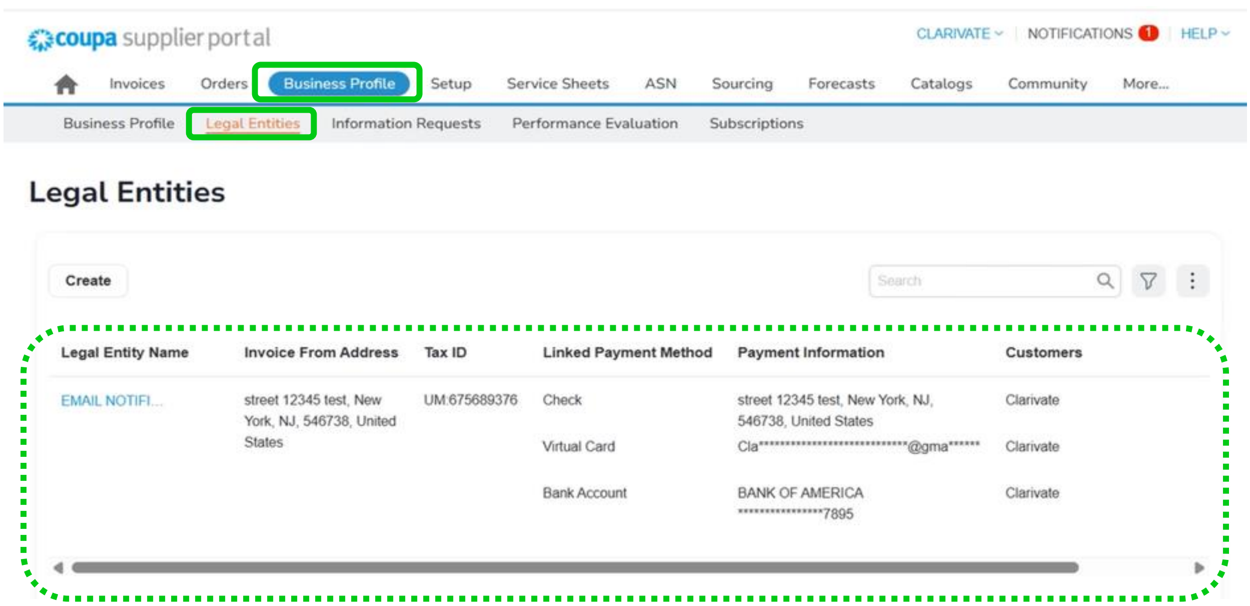
3. Once logged into the CSP, and on the Coupa home screen, click **Business Profile** at the top left, then **Legal Entities.** If you already have a legal entity within Coupa, you will see the Legal Entity under the **"Legal Entities"** tab. If not, then it will remain blank.



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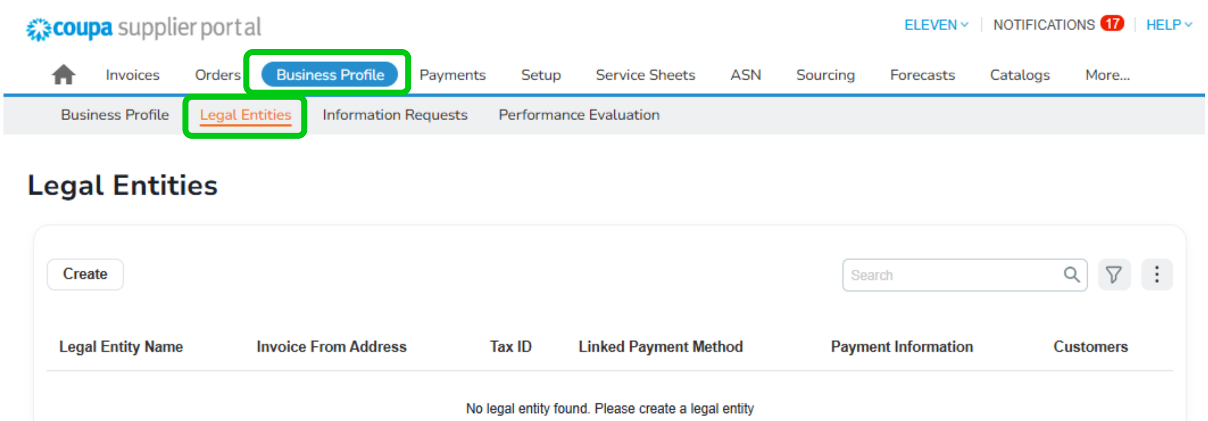
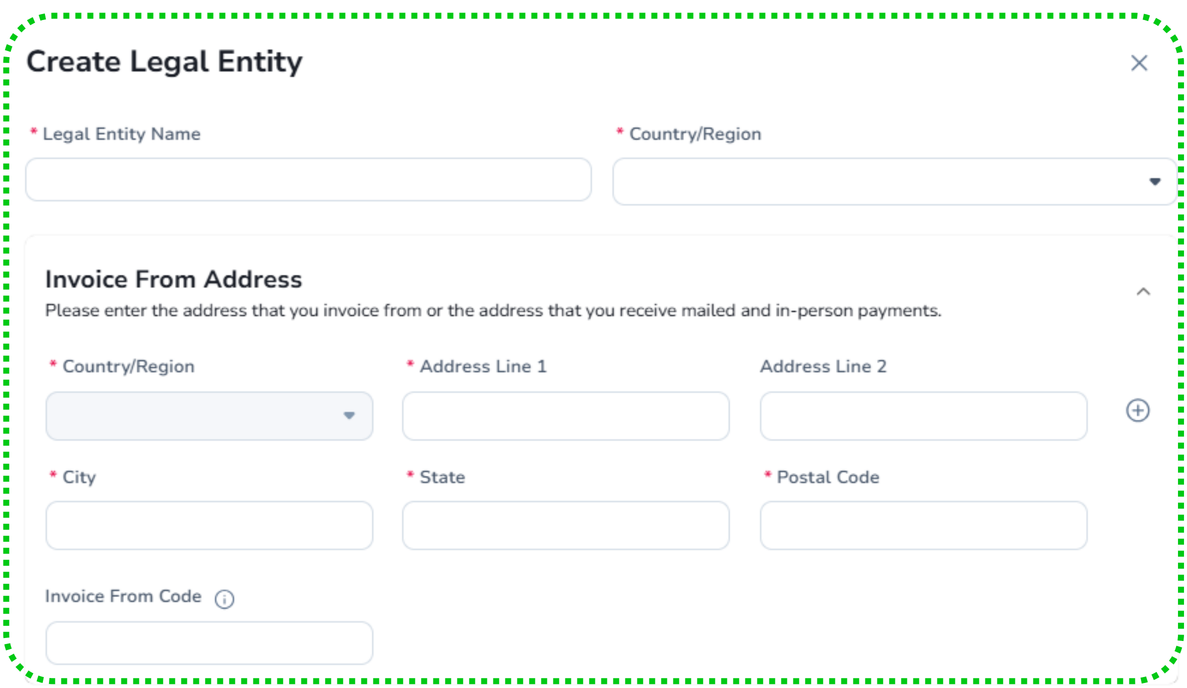
4. If no Legal Entity is present, enter your company information under **"Create" Legal Entity**





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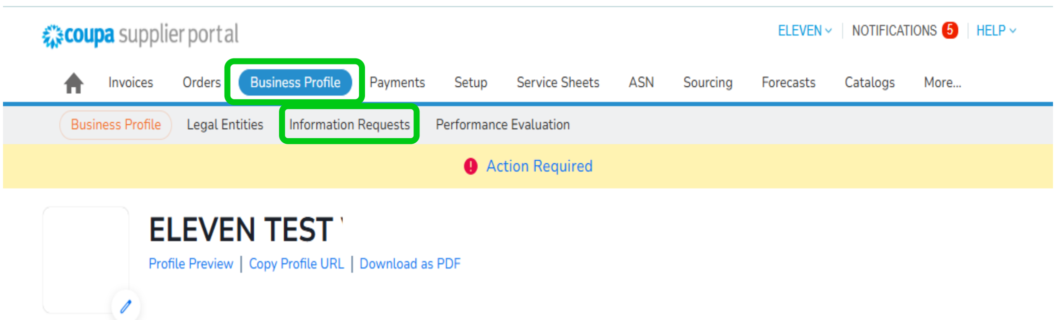
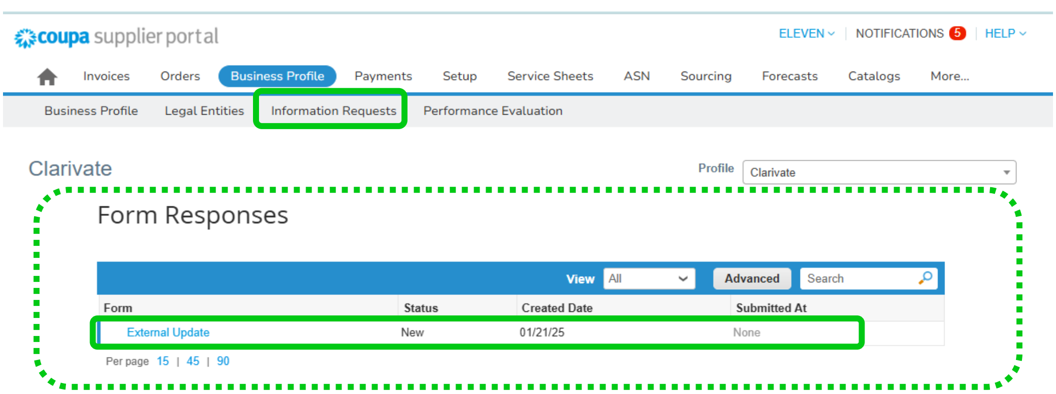
5. Once logged into the CSP, and on the Coupa home screen, click **Business Profile** at the top left, then **Information Request**



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

6. 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.



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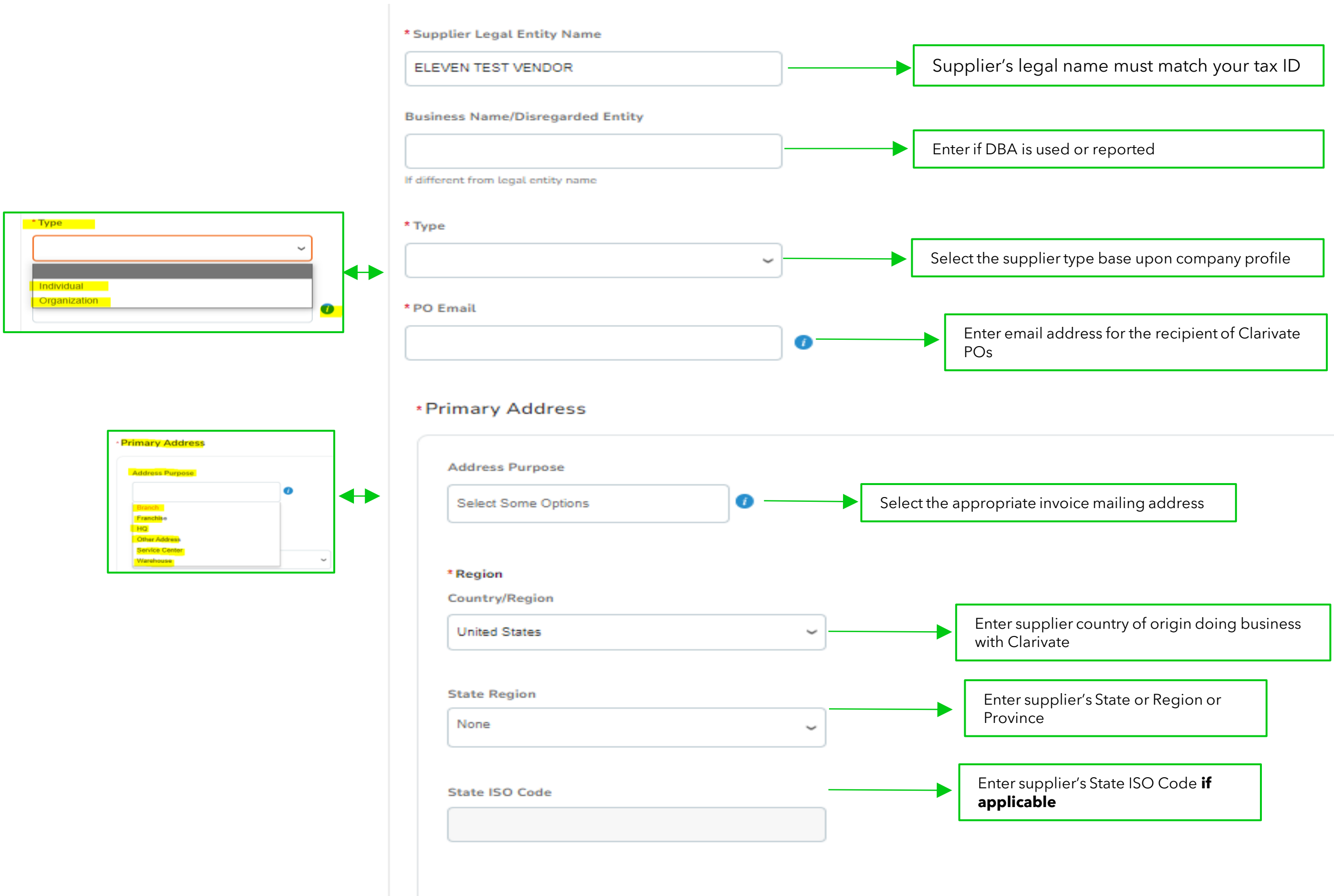
7. Populate your full business address (* mandatory fields):



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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

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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 Certificatate' 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

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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

US/Canada

650-555-1212

Enter contact telephone number

Mobile Phone

US/Canada

650-555-1212

If applicable

Fax

US/Canada

650-555-1212

If applicable

Additional Contacts

Contact Purpose

Select Some Options

First Name

Last Name

Email address

Work Phone

US/Canada

650-555-1212

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

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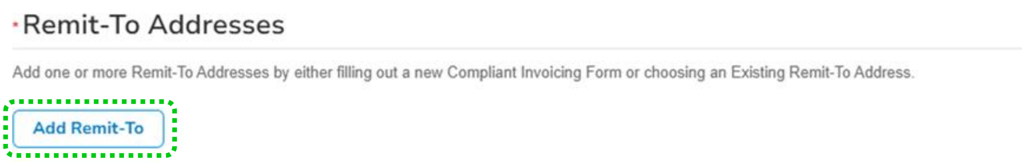
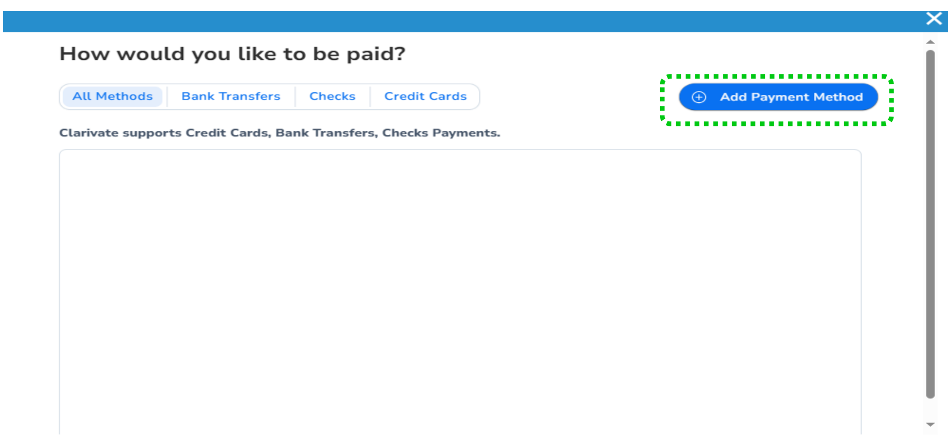
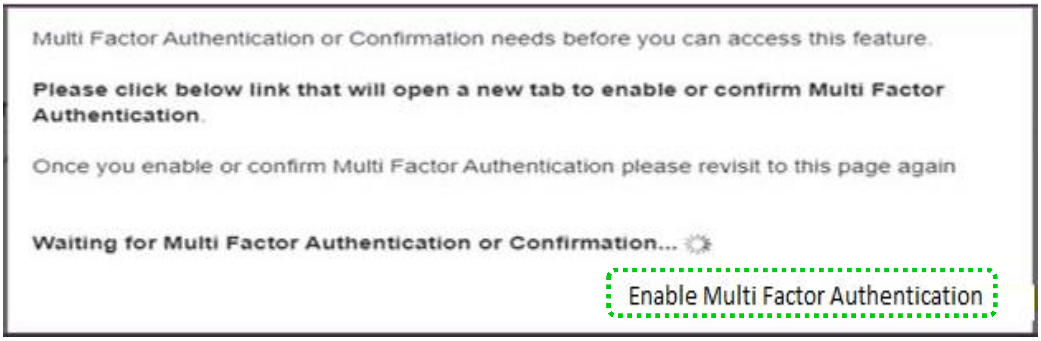
8. **Add Remit-To**: Add payment information and remittance address



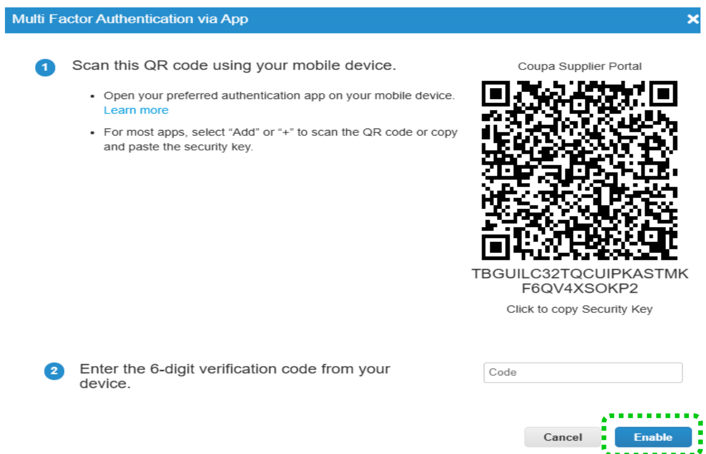
Then **Add Payment Method:**



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**:**

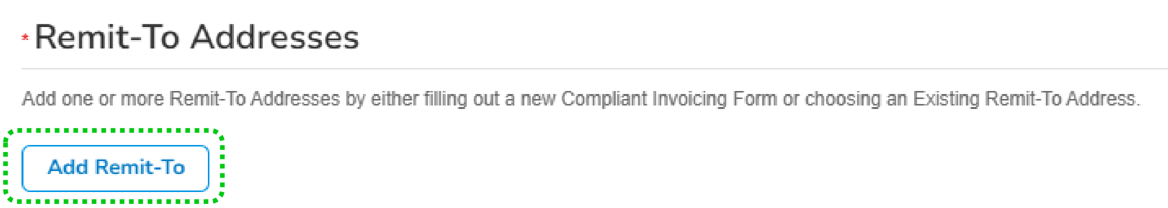


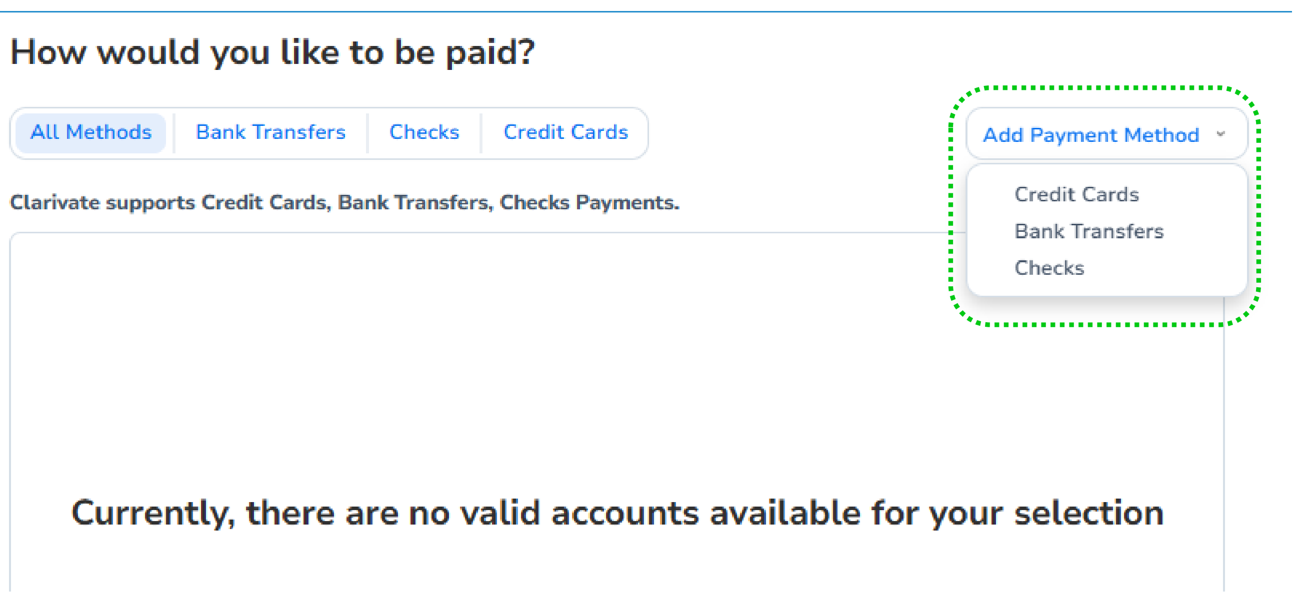
10. Multi Factor Authentication via App requires you to **scan QR code** to enter into the authentication app, you will receive a 6- digit code to enter, click enable.



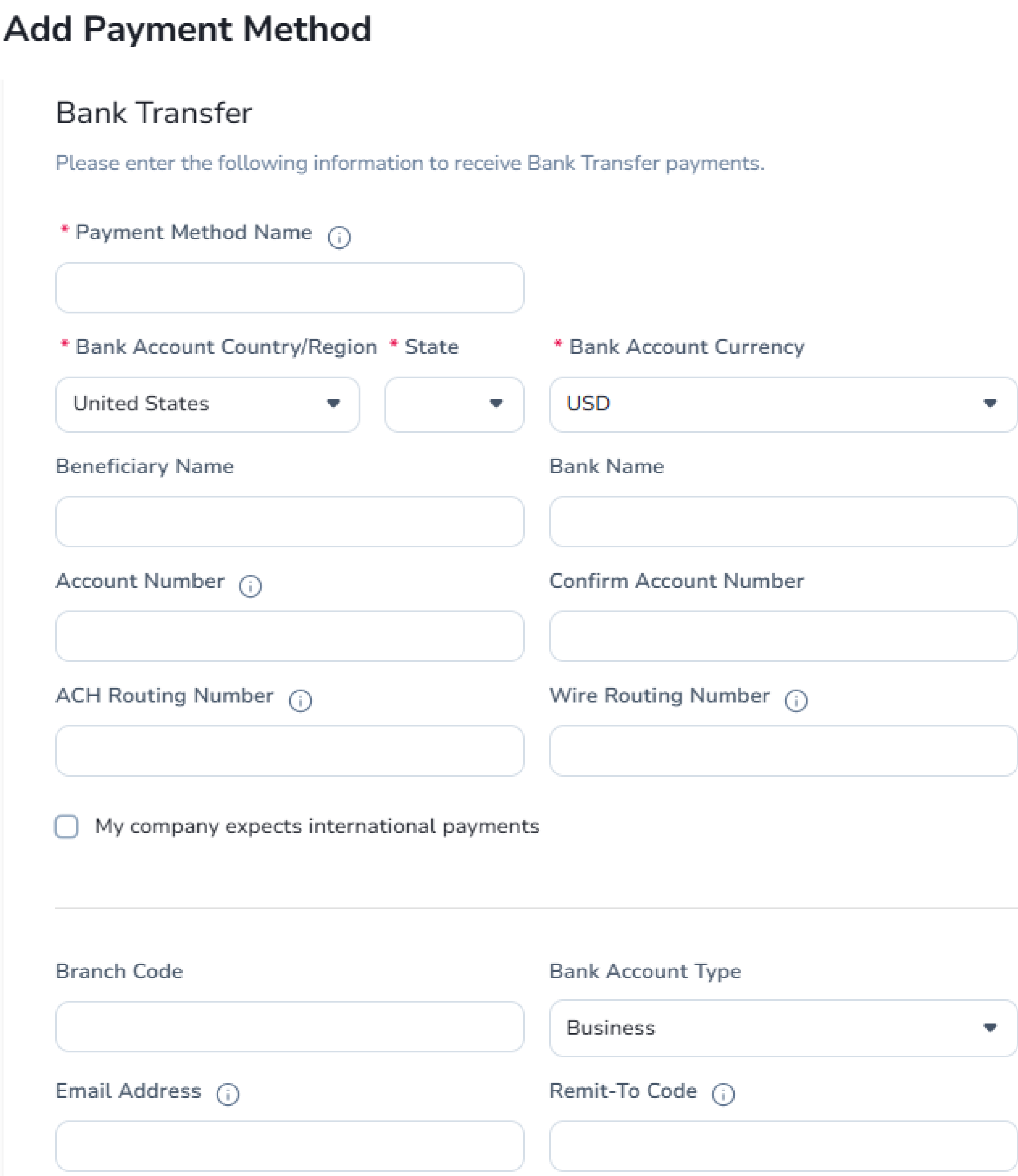
Copy/Download/Print codes to use at a later time:

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





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: United States
* State
* Bank Account Currency: USD

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: Business

Email Address

Remit-To Code

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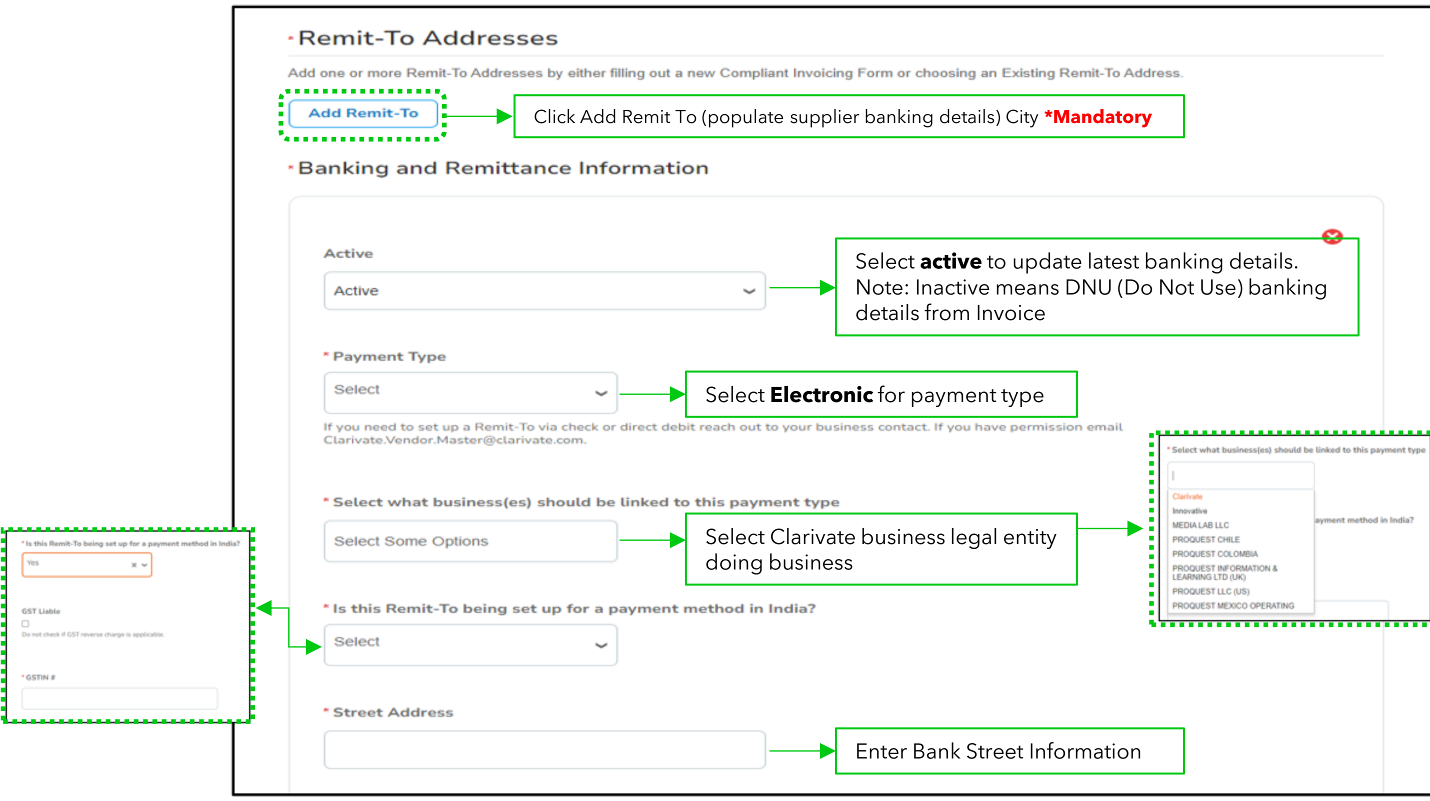
13. Once you have selected **"Add Remit-To",** select **"Address"** (default option), to continue to the next step.



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14. Populate **Banking Information:**

* Street Address	Bank street address ***Mandatory**
Street Address 2	**If applicable**
* City	Bank City ***Mandatory**
* Region Country/Region: United States	Bank Country ***Mandatory**
State Region: None	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**

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: USD → 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

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

IFSC Code

Enter IFSC Code **India ONLY**

Israel Bank Branch Number

Select

Enter for **Israel Banking ONLY**

Wire Routing Number

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

Bank Account Type

Select

For Japan Bank Accounts Only.

Select Saving/ Checking Account **Japan ONLY**

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

- Yes
- No

Select Option only when it is an Intermediary Bank Information

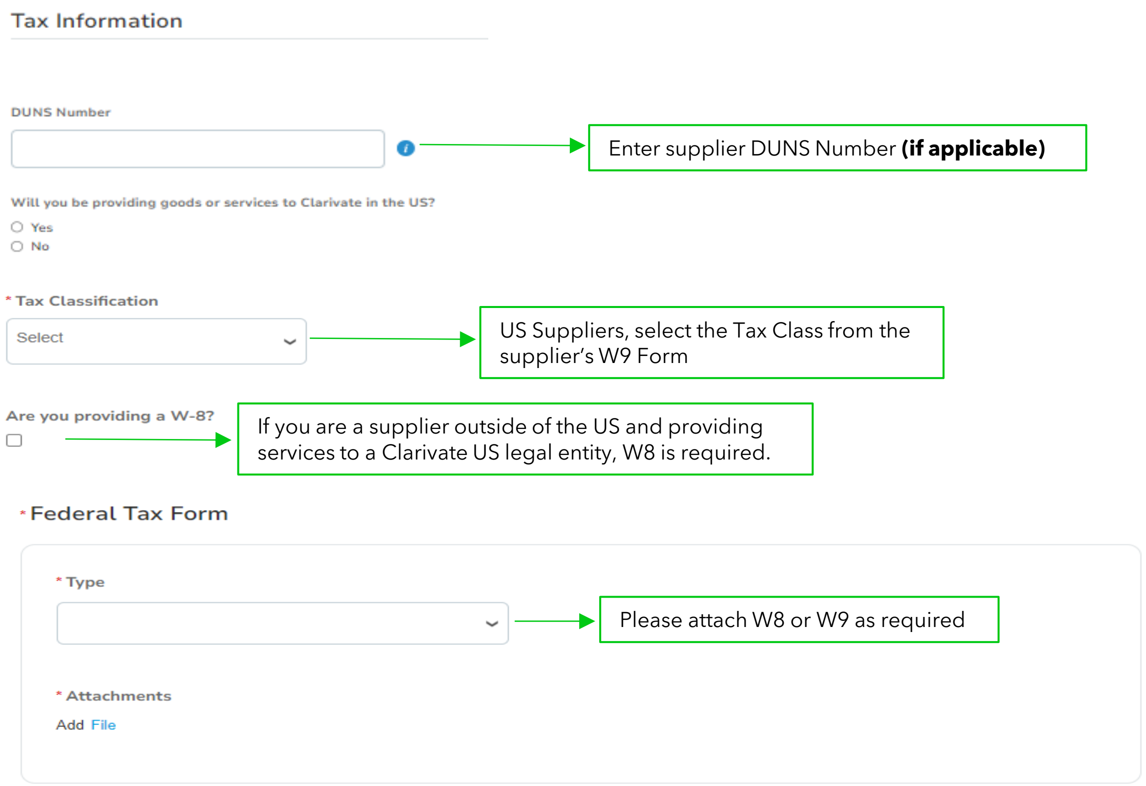
Pay Group

Select

For internal Clarivate use only

Internal **Clarivate Use ONLY**

15. Populate **Tax Information**:



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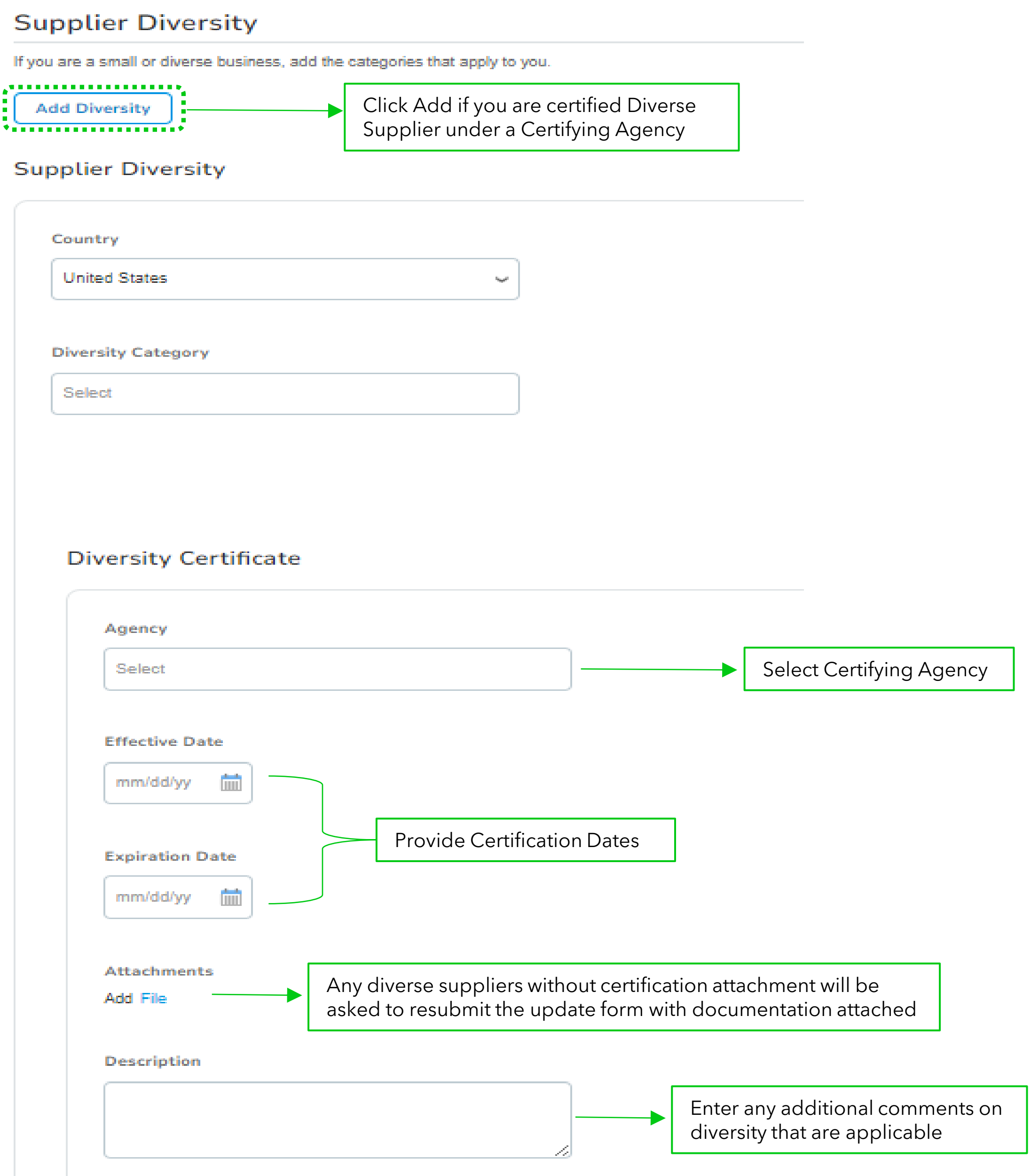
16. Add **Supplier Diversity** information:



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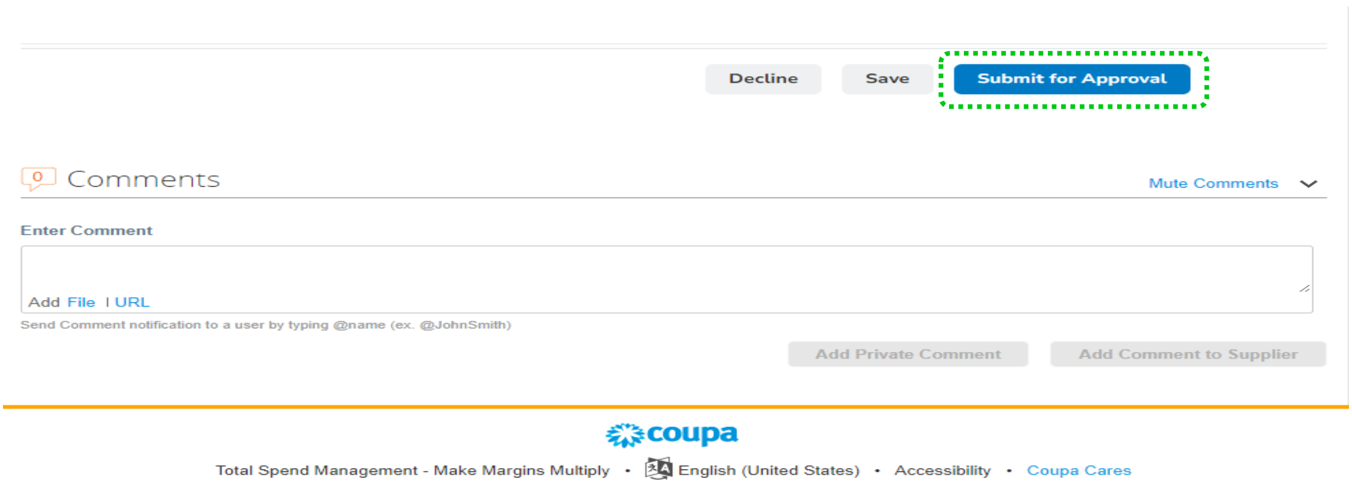
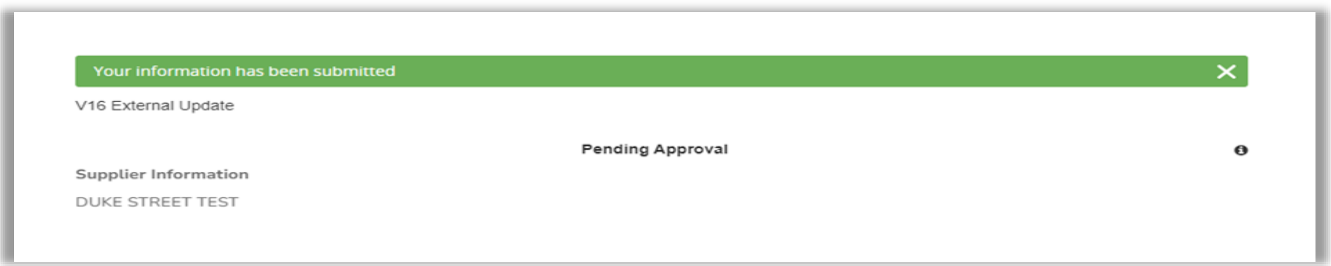
17. Submit for Approval:





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.

