Supplier Request for Information form

1. If you have never performed a business activity for Marquette University and have been approved as a new supplier or if you are an existing supplier that has not completed a Coupa Profile, you will receive an email from the "Coupa Supplier Portal" with the subject line "Request for Information from Marquette University".

2. Click on the "Join and Respond" button and create an account in the Coupa Supplier Portal.

Create a password and confirm this password for COUPA Supplier Portal entry. Accept the privacy policy and terms by checking the I ACCEPT box. Click GET STARTED.

MARQUETTE UNIVERSITY
BE THE DIFFERENCE.

Powered by **coupa**

Create your business account

Welcome to Marquette University!

We are excited to work with you. Please click on the link below for detailed instructions on how to complete your Coupa Supplier Portal profile.

COUPA SUPPLIER PORTAL INSTRUCTIONS

*** A FEW HELPFUL ONBOARDING TIPS***

- Complete the Remit-To section

- Select payment method: Virtual Pay Card (preferred), ACH, or Check

- Agree to one of our Terms & Conditions

Email   hendricks.mark4974@gmail.com

Password

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

Password Confirmation

☐ I accept the Privacy Policy and the Terms of Use.

Get Started

Having an issue with signup?

Forward this to someone

3. Fill out the following fields: Company Name, Country/Region, Address Line 1, City, State, and Postal Code. Click "Next"

5. Click "Take Me There"

4. Complete the Supplier Information fields; "Name", "Organization Type", "Country/Region of Operation".

7. Contact information will be automatically populated

5. Primary address fields must contain "Country/Region", "Street Address", "City", "State Region" and "Postal Code". If your address is a PO Box, enter as the "Street Address"

* Primary Address

Country/Region	United States
Address Name	
Street Address	1 MAIN ST
Street Address 2	
City	MILWAUKEE
State Region	Select an Option
Postal Code	53022
Location Code	
PO Box	
PO Box Postal Code	

Enter state information

*** Please enter address or PO Box in the Street Address field. Foreign entities are required to fill in the State Region field. If not applicable, enter your city name.***

6. If United States is selected, the Federal Tax ID or SSN field appears. If International the International Tax ID field appears. Enter the Tax ID or SSN without dashes (xxxxxxxxx). If you select "Yes" for "Are you using your Social Security # as your tax identifier", a series of required questions will appear. If "No", the questions will not appear.

Tax And Certificate Information

* Are you a US or an International based company?
- ○ United States
- ○ International

** Do not enter your banking information in the REMIT TO fields if you have a foreign bank account.**

* Are you using your Social Security # as your tax identifier?
- ○ Yes
- ○ No

Federal Tax Form

Type W9 ⌄

Saved Attachments 📄 W9-Test.pdf

Attachments Add File

* To be on-boarded you MUST ATTACH your W8 or W9 form. ***

* Federal Reportable ☑

Check box if you are required to file an information return with the IRS. Do not check if tax exempt or a corporation.

Tax-Exempt Other Explanation [   ]

7. Attach W-9 or W8BEN. Click on File to add. If you are Federally Reportable, check box. If exempt enter exemption information in "Tax-Exempt Other Explanation" field.

* Federal Tax Form

Type   ⌄

Attachments   Add File

*** To be on-boarded you MUST ATTACH your W8 or W9 form. ***

* Federal Reportable ☐

Check box if you are required to file an information return with the IRS. Do not check if tax exempt or a corporation.

Tax-Exempt Other Explanation

8. Select how you would like to be paid by Marquette University. Choose either Virtual Pay Card (Net15 payment terms offered and preferred), ACH or Check (Net 45 payment terms). You will see various hints to assist you in completing this section based on your payment choice

Banking & Remittance Information

* How would you like to be paid by Marquette? | Virtual Pay Card (Net 15)   × ∨

*** HINT FOR VIRTUAL PAY CARD ***
Suppliers will receive an automated email notification for each payment. These emails will contain a link to a secure web portal where the supplier will obtain the unique 16-digit Visa virtual credit card number, the amount to charge, and the other pertinent details of the transaction needed to process and reconcile the payments. You will receive further instructions for processing from a U.S. Bank representative.

* Standard processing fees administered by the supplier's merchant acquiring bank will apply

*** HINT FOR DIRECT DEPOSIT/ACH PAYMENT ***
Please enter your Remit-To Email address below and complete the Remit-To section by clicking the "Add" button. The following fields are required: BENEFICIARY NAME, BANK NAME, BANK ACCOUNT NUMBER, & BANK ROUTING NUMBER.

*** HINT FOR CHECK PAYMENT ***
If you've selected to be paid via check, please complete the Remit-To information section by clicking the "Add" button and leave the Banking Information blank.

Remit-To Email   [   ]

*** Please complete this field if you have selected Virtual Pay Card or Direct Deposit/ACH for your 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]

9. Click on the "Add Remit-to" button to create a Remit-to Address and to enter banking information for ACH payments. If selecting to be paid via check, select the "Add Remit-to" button, fill out the remit to address and leave the banking information blank.

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

Choose Remit-To Address   ✕

Choose a Remit-to Location below - Recommended
It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.

Choose existing or create new Remit-To Address:

1 MAIN ST
MILWAUKEE, WI 53022
United States
United States

✓ **Choose**

If choosing populated address, you will be directed to the Banking Information section

◀   ▶

➕ **Create New Remit-To Address**

Cancel

***If you choose the populated address, you will be directed to the banking section. If you choose "create new remit to address", you will be directed to a new window.

Enter "Legal Entity Name" and choose "Country/Region"

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

Cancel   Continue

Complete the "What address do you invoice from?" section and click the "Save and Continue" button. You can skip the "What is your Tax ID?" and "Miscellaneous" sections

Tell your customers about your organization

Which customers do you want to see this?

☑ All

☑ Marquette University

What address do you invoice from?

*Address Line 1	
Address Line 2	
*City	
State	
*Postal Code	
Country	United States

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 ⓘ

What is your Tax ID? ⓘ

Country	United States ▾ ✕
Tax ID	

☐ I don't have Tax ID Number

Add additional Tax ID

Miscellaneous

Invoice From Code	ⓘ
Preferred Language	English (US) ▾

Cancel   Save & Continue

10. If you selected Virtual Pay Card in Step 8, DO NOT SELECT VIRTUAL PAY CARD HERE.

 Select "Address" for check or "Bank Account" for ACH deposit. **DO NOT ENTER VIRTUAL CARD HERE-select above in Step 8.**

If choosing ACH, Enter the Bank Name, Beneficiary Name, Routing Number, Account Number, Confirm Account Number, and Bank Account Type to complete the banking information section. The rest of the fields are not required. You can leave all other fields blank and scroll to the bottom of the

Confirm the information is correct and click the "Next" button

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	
Address	45 Pointe Place Milwaukee WI 53233 United States	Active	Manage

Deactivate Legal Entity   Cancel   **Next**

Confirm the information is correct and click the "Done" button

Where do you ship goods from?

1 2 3 **4**

For many countries 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	
45 Pointe Place Milwaukee WI 53233 United States	Active	Manage

Deactivate Legal Entity   **Done**

The system will ask if you want to add another Remit-To address, if complete, click the "Add Now" button

Setup Complete

1 2 3 **4**

Do you want to Add Remit-To Address to the customer profile now?

Add Later   **Add Now**

11. If appropriate Indicate if you are a Small Business, Minority Business, or Women Business Enterprise. If none of the above leave blank.

Ownership

Small Business
Enterprise

Effective Date   mm/dd/yy

Expiration Date   mm/dd/yy

Attachments   Add File

Description

12. You must select and agree to at least one set of Terms & Conditions. Fellowship or Stipend should NOT be selected for speaker agreements, please select standard services.

Goods/Services Terms & Conditions *** You MUST select Yes to one of the below terms ***

* Are you receiving a
fellowship or stipend?
○ Yes
◉ No

* Will you be supplying
standard products?
◉ Yes
○ No

Products Terms &
Conditions
📄 Standard_Purchase_Order_Terms_and_...

* Do you agree to the
Standard Terms &
Conditions?
◉ Yes
○ No

Click Submit for Approval to complete the form

Decline   Save   Submit for Approval

13. You will receive a confirmation email once the form is approved by Marquette University.