New 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, you will receive an email from “Coupa Supplier Portal” with the subject line “Request for Information from Marquette University”.

![Email screenshot](image-url)
2. Click on the “Join and Respond” button and create a record in the Coupa Supplier Portal. Fill out the following fields: First name, Last name, Company, email, password, and password confirmation. Accept the privacy policy and click “Submit”. Reminder: Do not forward the invitation.
3. Enter the necessary fields, note that fields with an * are required.

**Supplier Information**

* Name: MU SUPPLIER SET UP INST

Doing Business As Name: Enter DBA name here

* Organization Type: Corporation

* Country of Operation: United States

4. The Primary Contact section will be auto populated. You can edit if necessary

**Contact Information**

**Primary Contact**

* First Name: YOUR

* Last Name: NAME

* Email address: MUTESTSUPPLIER2019@C

* Work Phone: US/Canada +1 (414) 288-7359

Mobile Phone: US/Canada 650-555-1212
5. Complete the Primary Address fields. The following fields are necessary to complete the process: “Street address”, “Postal Code”, “City”, “State Region”, and “Country”.

6. Enter your tax information including your FEIN or SSN. If you are using your SSN you will need to complete a questionnaire. If you have a FEIN, the questionnaire will not appear.
7. If you entered an SSN as your Federal Tax ID number a set of 9 questions will need to be completed. If a FEIN was entered, the set of 9 questions will not appear and you can move on to the next step.

**Tax And Certificate Information**

- Tax Region: US
- Federal Tax ID: FEIN or SSN Here
- Are you using your Social Security # as your tax identifier?  
  - Yes 
  - No
- Have you filed a business or self-employment income tax return with the IRS based on substantially similar work or service in the previous year?  
  - Yes 
  - No

8. Attach a W-9 or W-8BEN and check the box if you are Federal Reportable. The W-9 or W-8BEN is required to be approved to Coupa.

***To be on-boarded you MUST ATTACH your W9 Form***

International Tax ID: 

* Federal Reportable: 

Tax-Exempt Other Explanation: 

Click on the File link to upload W-9 or W-8
9. If you would like to receive payment via ACH, click the “Add” button to enter banking details. If check is preferred, you can continue to step 11.

10. Follow the prompts to add banking information.
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

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

[Continue] [Cancel]
Tell your customers about your organization

Which customers do you want to see this?
- All
- Marquette University Test

What address do you invoice from?
- Address Line 1
- Address Line 2
- *City
- *State
- *Postal Code
- Country: United States
- Use this address for Remit-Tt
- Use this for Ship From address

Banking information
- Bank Account Country: United States
- Bank Account Currency: 
- Bank Name: 
- Beneficiary Name: 
- Routing (Bank Code) Number: 
- Account Number: 
- Account Number Country: 
- IBAN: 
- SWIFT/BIC Code: 
- Bank Account Type: Business

Bank address
- Address Line 1: 
- Address Line 2: 
- City: 
- State: 
- Postal Code: 

Complete the form and click on the “Done” button when finished
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

Expiration Date

Attachments

Description

12. You must select and agree to one set of Terms & Conditions. In order to be approved into Coupa, you must answer “Yes” to at least one of the questions in this section.

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

* 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

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