



Coupa Supplier Portal (CSP) & Morningstar/PitchBook Supplier Information Management Forms

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Last Updated: 7th July 2020*



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Background

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily conduct business with Morningstar/PitchBook using Coupa. You also can manage various content and settings for your Morningstar/PitchBook profile.

Some of the content and information that is available to manage is:

- Manage Company Information
- Ability to view invoice status and payment information
- View purchase orders from all customers - To be available in the future
- Ability to easily create invoices via PO flip - To be available in the future

Please note our supplier set up process consists of two parts:

1. Registering on the Coupa Supplier Portal. Although registration on the CSP is not essential at this time, we encourage you to register as this will allow you to view the status of your invoices and manage your company information.
2. Completing our online Supplier Information Management forms (required for all suppliers). To learn more about completing our forms without registering for the CSP, please see the [COMPLETE MORNINGSTAR'S SUPPLIER INFORMATION MANAGEMENT FORMS SECTION](#)

Helpful Hints & Where to Go for Help

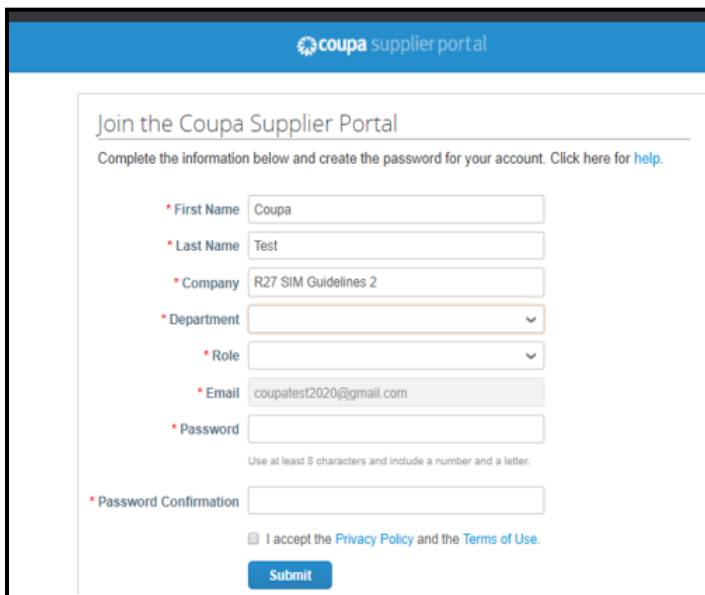
- If you need any assistance with the CSP registration process or completing our Supplier Information Management forms, please reach to below email id's
 - Morningstar Supplier should reach to payables@morningstar.com and cc to MorningstarSupplierMgmt@morningstar.com
 - Pitchbook Supplier should reach to accountspayable@pitchbook.com and cc to MorningstarSupplierMgmt@morningstar.com
- The recommended browser for Coupa is Chrome. We have experienced functionality and navigation issues using Internet Explorer.
- Please be aware of the autofill settings on your browser. If they are turned on, data may populate incorrectly in the forms.
- When using the CSP, please note that it may take a few minutes for the Morningstar profile to load.
- If you elect to complete our Supplier Information Management forms without registering for the CSP, please ensure that you retain the original email that is sent to you with the link to the form. In instances where updates to the information provided in the form are required, you will need to navigate back to the link in the original email to access the form again.

Step 1: Register for the CSP with an Invitation from Morningstar/PitchBook

You will receive an e-mail from our Coupa system (do_not_reply@supplier.coupahost.com) with a unique link to join the Coupa Supplier Portal at the bottom of the email. Click on the link, you will be directed to the CSP to register your account.

Important notes:

- You must register for the CSP using the email address that received the invitation. If you would like to register for the CSP using a different email address or you are not the correct person to be completing the forms, please forward your invitation as per the details in the "Log in with an existing account" section below.
- The invitation will continue upto 15 days until action has been completed and will expire after 30 days.



The screenshot shows the 'Join the Coupa Supplier Portal' registration form. The form includes the following fields and options:

- First Name:** Coupa
- Last Name:** Test
- Company:** R27 SIM Guidelines 2
- Department:** (Dropdown menu)
- Role:** (Dropdown menu)
- Email:** coupatest2020@gmail.com
- Password:** (Text field with a note: "Use at least 8 characters and include a number and a letter.")
- Password Confirmation:** (Text field)
- I accept the [Privacy Policy](#) and the [Terms of Use](#).
- Submit** button.

1. Fill in the required fields as indicated by the (*).

2. You will also be required to check the box to accept the Privacy Policy and the Terms of Use.

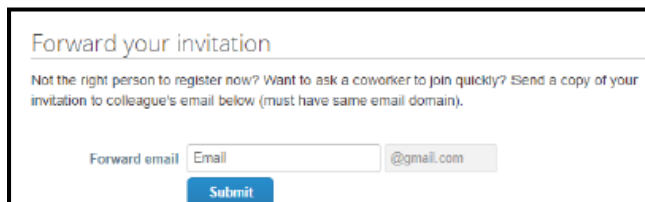
3. Hit Submit.

Helpful Hint

Save <https://supplier.coupahost.com> as a favorites link for quick access when you need to return to the site.

Log in with an existing account

If you are already on the CSP, login with your existing CSP login & password. If we have emailed the CSP invitation to an incorrect contact at your company, please let us know morningstarSupplierMgmt@morningstar.com and reference the incorrect email address as well as the correct contact name and email and we can resend.



The screenshot shows the 'Forward your invitation' form. The form includes the following fields and options:

- Forward email:** (Text field with a note: "Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).")
- Email:** (Text field)
- @gmail.com** (Text field)
- Submit** button.

If you are not the correct person to be completing these forms, you have an option to forward your CSP invitation to someone else in your company located below the CSP login details section.

They will receive an invitation to the CSP and will be granted admin access to your company's CSP profile. They will be required to complete Morningstar's Supplier Information Management forms to complete the onboarding process.

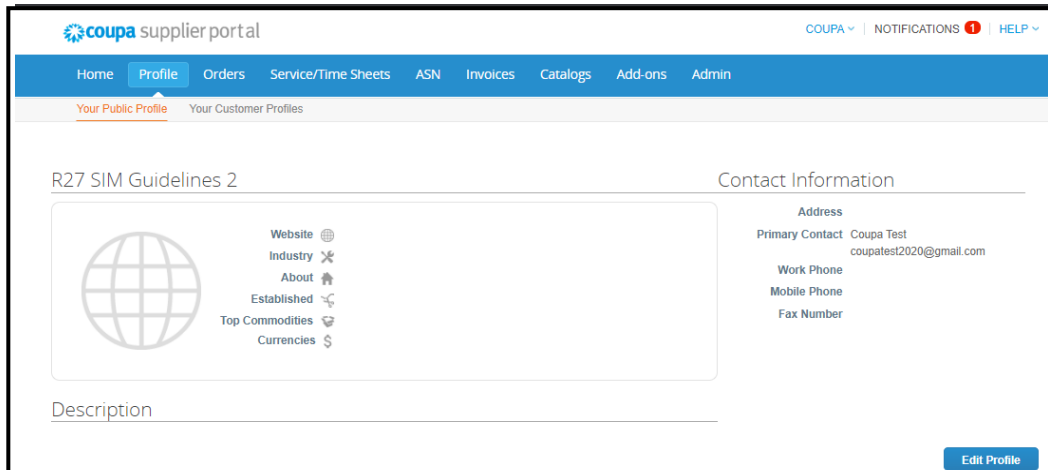
[COMPLETE MORNINGSTAR'S SUPPLIER INFORMATION MANAGEMENT FORMS SECTION.](#)

Understand the CSP Home Screen Structure

1. Navigation Bar

- You can configure your profile/account and administer your connection through the CSP.
- Access to these tabs provides you with real-time status of invoices with Morningstar/PitchBook.
- You can even communicate through the CSP to Morningstar/PitchBook through the comments section on invoices.

After logging in it directs you to Your Public Profile, after which you need to go to “Your Customer Profiles”.

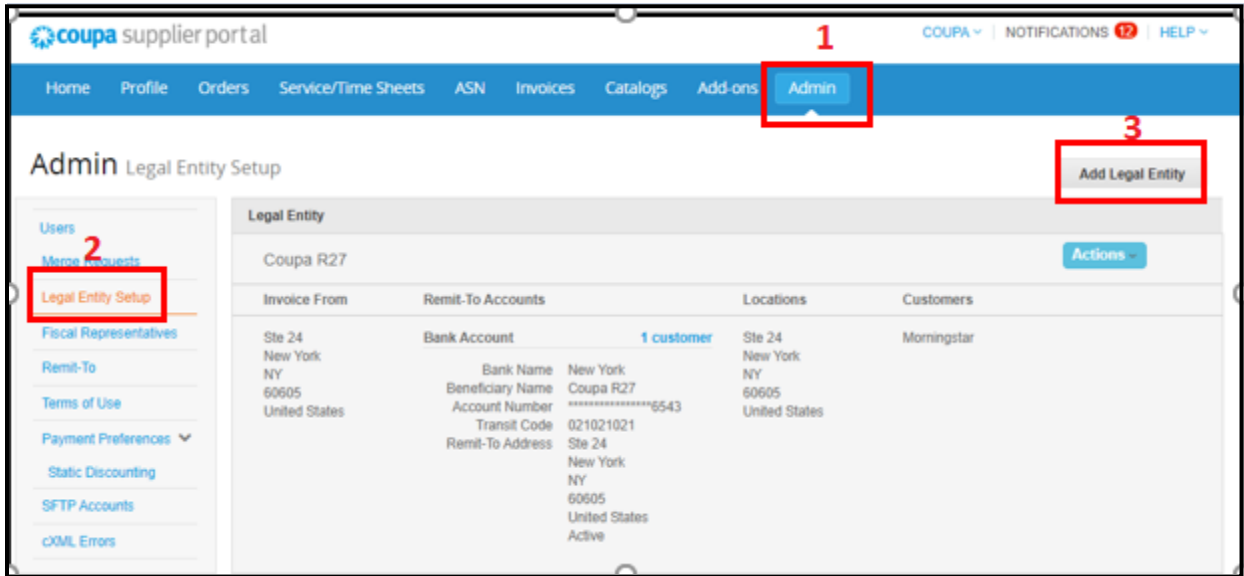


2. Notifications

- You'll notice in the top right of the home screen, the red bubble next to Notifications. You can easily see if there is something requiring your attention, such as a request to complete a Supplier Information Management form.

Step 2: Manage Company Information & Create a Legal Entity

If your company has not connected with other customers on the CSP, you'll need to create a **Legal Entity**. Navigate to the **Admin** tab, click **E-Invoicing Setup**, then hit **Add Legal Entity**



After clicking **Add Legal Entity**, expect to see the following forms that you need to fill out.

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.

Cancel Continue

- Where's your business located? Complete the "Legal Entity Name" field in addition to selecting a "Country" for your business location
- Tell your customers about your organization: Complete the required fields when the CSP prompts you to complete "What address do you invoice from?". After completing required address information, scroll down and select "Bank Info and Assign Customers" beneath Miscellaneous.
- Bank Info & Assign Customers: You can populate your banking details here, but you may not find all the banking detail fields required for your country. There will be an opportunity to edit/complete the banking details as part of the Morningstar specific Supplier Information Management forms. In the Assign Customers section, you must at least click Morningstar. Clicking All will connect this legal entity for all your customers. Click **Done**.

Tell your customers about your organization

Which customers do you want to see this?

All
 Morningstar - R27 SIM Guidelines 2

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 x
Tax ID
 I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code ⓘ
Preferred Language English (US)

Where do you want to receive payment?

1 2 3 4

* Payment Type Address

What is your Remit-To Address?

Address Line 1 Ste 24
Address Line 2
City Chicago
State
Postal Code 60602
Country United States

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	Ste 24 Chicago 60602 United States	Active	Manage

Deactivate Legal Entity
Cancel
Next

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	
Ste 24 Chicago 60602 United States	Active	Manage

Deactivate Legal Entity
Done

Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

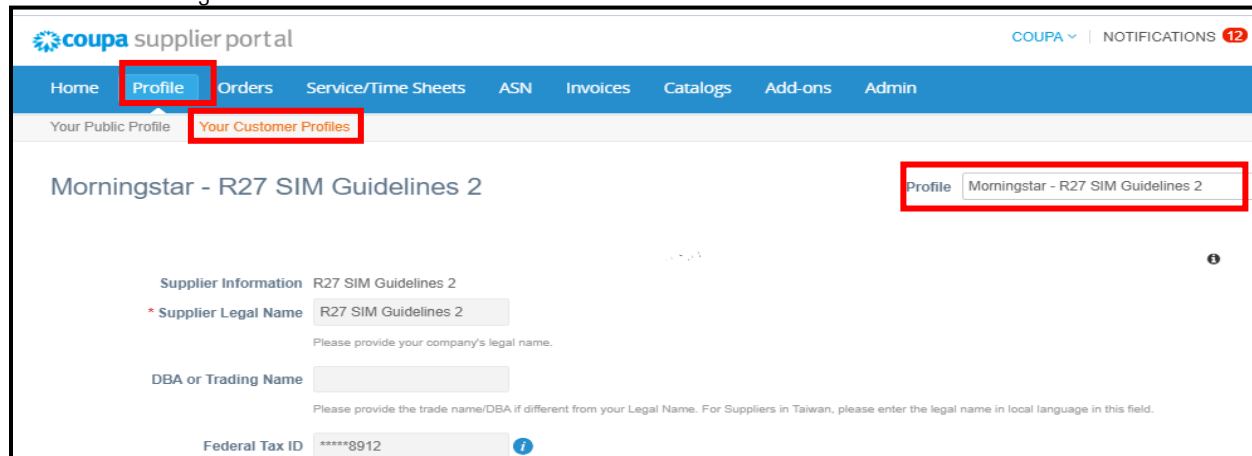
To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** ⓘ

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Go to Orders
Go to Invoices
Return to Admin
Done

Complete the Morningstar Supplier Information Forms (Required for All Suppliers)

Morningstar/PitchBook will be sending you Supplier Information forms so that we can keep your information updated in our system. Click on the **"Profile"** tab at the top of the page, then click on **"Your Customer Profile"** tab and select **"Morningstar"** from the Profile drop down. Request you to hold on few seconds as it will take some time for the page to get load. Our Supplier Information Form will appear. If you have not registered for the CSP, click the unique link at the bottom of the email you received from do_not_reply@supplier.coupahost.com to navigate to our online Supplier Information Management forms.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Profile' tab is highlighted. Below the navigation bar, there are two sub-tabs: 'Your Public Profile' and 'Your Customer Profiles', with the latter being active. The main content area displays 'Morningstar - R27 SIM Guidelines 2'. A dropdown menu is open, showing 'Profile' and 'Morningstar - R27 SIM Guidelines 2'. Below this, there are input fields for 'Supplier Information' (R27 SIM Guidelines 2), 'Supplier Legal Name' (R27 SIM Guidelines 2), 'DBA or Trading Name', and 'Federal Tax ID' (****8912). There are also instructions for each field, such as 'Please provide your company's legal name.' and 'Please provide the trade name/DBA if different from your Legal Name. For Suppliers in Taiwan, please enter the legal name in local language in this field.'

Follow the instructions below to complete our forms. The fields required on our Supplier Information Management forms depend on the location of the Morningstar/PitchBook entity with whom you will be doing business. As a result, you may see some instructions about fields that do not appear on the form our Supplier Management team has sent to you. You can disregard instructions for fields you do not see on your form. We require the following information to approve your form:

1. **Supplier Legal Name**
2. **DBA or Trading Name** (if any)
3. Enter one of the following depending on the Country where you are located. For suppliers working with our US entities one of these fields is always required. For suppliers working with our entities outside US and you are not registered for VAT/GST, please enter '0' in the International Tax ID field.
 - a) **Federal Tax Id** (for suppliers in the US)- enter 9 digits without any "-".
 - b) **International Tax Id** (for suppliers outside the US).
4. For Suppliers doing business with our Morningstar/PitchBook Entities in the US, please complete the following tax reporting fields. If you are doing business with our entities outside the US, please see step 5.
 - a) **Supplier Classification** – Please select the tax classification according to what has been selected on your W-9 or W-8.
 - b) **Will the income earned be effectively connected with your US Business Trade:** If you are in the US, this is typically "Yes" (as a result of signing the W-9 form). If you are located outside the US, please review the W-8 form your company is providing and answer "Yes" or "No" as applicable.
 - c) **Nature of Goods & Services:** Select according to your Business.
 - d) **Software Purchase Details:** Select according to your Business. If we are not purchasing software from you, please select N/A.

Supplier Information Jitender Singh

* Supplier Legal Name
Please provide your company's legal name.

DBA or Trading Name
Please provide the trade name/DBA if different from your Legal Name. For Suppliers in Taiwan, please enter the legal name in local language in this field.

Federal Tax ID ⓘ

International Tax ID
VAT/GST ID, Canadian GST/HST and GST Business #, Australian Business No.

* Supplier Classification (USA) x v

* Will the income earned be effectively connected with your US Trade or Business?
Please enter "YES" only if the following conditions apply to your company: (1) Has a trade or business in the US (2) Will be filing a US Tax Return with the IRS (3) Has obtained a US Taxpayer ID Number to submit these returns. Otherwise, please enter "NO"

* Nature of Goods/Services x v
Select Type of Good/Services your company will provide.

* Software Purchase Details

- Services
- Lease of Hardware/Equipment
- Hosted Software
- Lease of Data connection
- Installed Software
- Other
- N/A

If Software has been selected above, please choose the type of Software. If Software has not been selected above, please select "N/A".

e. **W-9 or W-8 Form:** Choose the form you are attaching from the drop down and attach the latest signed version in the attachment field. We require suppliers to have a form signed within the last 12 months. We will request new forms every three years.

*You can refer the link available on the form for the most recent version of the W-9 or W-8 form can be downloaded from the IRS website.

5. For our suppliers working with Morningstar entities outside the US:

a. Organization Type: Please select Organization or Individual from the drop down

b. For our suppliers in India working with Morningstar entities in India:

i. **PAN No:** Please provide your PAN number in this field

ii. **Supplier Classification (IND):** Please select your classification from the drop down.

6. **Primary Contact:** Update the Primary Contact details such as First Name, Last Name, Email address (these 3 are required fields), Mobile Phone, Work Phone, Fax no, Invoicing Email Address (the email you will use to send us AP invoices) , Remittance Email Address (if you would like us to send you Remittance notifications when an invoice is paid in our ERP, please include it here) & PO Email Address (in the future, we may require Purchase Orders on our transactions with you. This is the email where you would like us to send those P.O.s).

*** W-9 or W-9 Form**

Type

Attachments [Add File](#)

Please attach a copy of the appropriate signed W-9 or W-9-E series (depending upon your individual/company profile).

The most recent version of the W-9 or W-9-E form can be downloaded from the IRS website at this link <https://apps.irs.gov/app/picklist/list/forms...>

Attachment 1 No file chosen
Please attach additional documents as needed.

Attachment 2 No file chosen
Please attach additional documents as needed.

Attachment 3 No file chosen
Please attach additional documents as needed.

*** Primary Contact**

First Name

Last Name

Email ⓘ

Mobile Phone +1 (982) 047-8845 ⓘ
800-000-1212

Work Phone ⓘ
850-555-1212

Fax ⓘ
800-000-1212

Invoicing Email Address
Email ID that you will use to send us invoices.

Remittance Email Address
Email ID if you would like to receive remittance notifications.

PO Email Address ⓘ
Email ID where you want to receive Purchase Orders.

7. Primary Address: Please read the instructions in the address fields carefully and enter information only in the Street Address, Street Address 2, Postal Code, City, State Region and Country Fields.

Important note: Do not enter any data in the Location Code, Address Name, PO Box and PO Box Postal Code fields.

*** Primary Address**

Country

Address Name

Street Address

Street Address 2

City

State Region

Postal Code

Location Code

PO Box

PO Box Postal Code

*** Country of Residence/Domiciled**
Please indicate the country where your company is a resident/domiciled. This is typically your country of incorporation.

8. Supplier Diversity & Compliance

To qualify as a diverse supplier, please attach any relevant certifications.

Small Business Certification

Effective Date

Expiration Date

Attachments [Add File](#)

Description

Women Business Certification

Effective Date

Expiration Date

Attachments [Add File](#)

Description

a. For suppliers working with our entities in US and CAN, please complete this section if your company classifies as a diverse supplier.

GDPR Compliance

Effective Date

Expiration Date

Attachments [AMM_GDPR_Policy.pdf](#)

Description

Please attach your GDPR Policy if you are GDPR compliant. If you do not attach your policy, we will deem you to be non-compliant. The date fields are not required.

Please review Morningstar's GDPR policy at this link

<https://bit.ly/2W064y0>

Modern Slavery Act Compliance

Effective Date

Expiration Date

Attachments [AMM_Modern_Slavery_Act_Statement_...](#)

Description

Please attach your statement of compliance with the Modern Slavery Act. The date fields are not required.

b. For Suppliers working with our entities in EMEA, please review and update the GDPR and Modern Slavery Act Compliance sections as applicable

9. **Invoice Frequency and Currency** - Please indicate how often you'll send us invoices and the currency of those invoices

* Invoice Frequency *
Please update how frequently invoices will be sent.

* Preferred Currency

10. **Banking Details**- Please attach any one document (in PDF format only) which we can use to verify your banking details. Document such as Cancelled/Void Check, an invoice having bank details, a letter from your bank, banking details on company Letter Head or an ACH authorization letter from your company with the banking details. This field can be found below Preferred Currency and above the Remit to Address Lines section. You will also be required to enter those banking details in the Remit to Address Section.

* Bank Document Attachment

Attachments [Add File](#)

Please attach a pdf document to validate your company's bank details (e.g. invoice copy, letter from your bank, bank statement or ACH Authorization form).

For new suppliers please click the "ADD" button below the Remit-To Address Lines to enter your banking information.

For existing suppliers updating banking information, please choose "Inactive" to deactivate your old banking details and scroll down to enter your new "Active" banking details.

* 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.

11. **Remit to Address Lines**- this is the section where you are required to enter your banking details. To expand this section, please click the ADD Remit to button and click on Cancel.

12. The banking details entry form will open, please enter your Bank Name, the Bank Country and enter/edit your banking details as needed.

* Active

* Bank Name

* Bank Country

Please select the country where your bank is located.

* Bank Account Name

* Bank Account Number

Bank Routing Number i
For suppliers in USA, please enter the 9 digit ABA #. For suppliers in Canada, please enter the 9 Digit Routing # (0+3 Digit Branch # +5 Digit Transit #).

BSB i
Suppliers in Australia or New Zealand Only.

Sort Code i

IBAN Number i

BIC (Swift Code) i

Bank Giro No.
Suppliers in Sweden and Denmark Only.

IFSC Code
Suppliers in India Only.

Bank Code
Suppliers in Taiwan Only.

13. Select the Submit for Approval button at the bottom of the page - you will then see a pop-up that says your form has been submitted. Once submitted, the status of the form will be Pending Approval (refer to the top of the screen).

coupa supplier portal JITENDER ▾ | NOTIFICATIONS 1 | HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

Profile

Pending Approval i

Supplier Information Jitender Singh

* Supplier Legal Name
Please provide your company's legal name.

DBA or Trading Name
Please provide the trade name/DBA if different from your Legal Name. For Suppliers in Taiwan, please enter the legal name in local language in this field.


Federal Tax ID i

International Tax ID
VAT/GST ID, Canadian GST/HST and QST Business #, Australian Business No.


14. Our Financial Shared Services Supplier Management team will review your form to ensure everything is filled out correctly and we have all the information we need. If everything is ok, we'll approve it and your supplier record will be created in Coupa. If we are missing anything, we'll send back the form and rejection reason will be stated in the email.

This email will be received on your CSP registered email address from do_not_reply@supplier.coupahost.com.

Profile Info submitted to Morningstar was Not Approved Inbox x

 **Morningstar** <do_not_reply@morningstar-test.coupahost.com> 16:35 (1 minute ago)
to me ▾

Profile Info submitted to Morningstar was Not Approved

Powered by 

Hi Coupa,


The company profile information that you submitted to your customer, Morningstar was not accepted.

This usually means that some information was not correct and they cannot activate your new information as is.


You can click below to view additional details or update your info.

[Update Info](#)

New Comment on Profile Info submitted to Morningstar Inbox x

 **Morningstar** <do_not_reply@morningstar-test.coupahost.com> 16:35 (4 minutes ago) ☆
to me ▾

New Comment on Profile Info submitted to Morningstar

Powered by 

Gitesh Shinde at Morningstar added a new comment on 05/29/20 at 06:05 AM to the company information profile you submitted.

The comment is "Rejected as kindly attach W-9 copy"

You can review the profile of submitted information or respond by clicking below.

[View Profile](#) [Respond](#)

Other CSP Functionality

Invoices

Invoices						
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
MS105	04/12/18	Pending Approval	None	17.12 USD	No	
MS104	04/12/18	Approved	US1000707	97.64 USD	No	
MS103	04/12/18	Pending Approval	None	5.00 USD	No	
MS102	04/12/18	Approved	US1000707	428.32 USD	No	
None	04/10/18	Draft	None	0.00	No	
628614	04/06/18	Approved	US1000692	290.08 USD	No	
None	04/06/18	Draft	US1000692	290.08 USD	No	
44322	04/05/18	Approved	US1000686	291.58 USD	No	

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- Selecting the **"Invoices"** tab from the menu will take you to a screen where you can view invoices. This will provide a summary of all previously entered invoices. Clicking on the blue invoice number will open the invoice.
- This screen provides a real-time view into the current stage of the invoice status.
 1. **"Approved"** status indicates the invoice has been processed for payment.
 2. **"Draft"** invoices have not been submitted to Morningstar/PitchBook and can be edited by clicking on the pencil icon in the "Actions" column.
 3. **"Pending Approval"** indicates the invoice is pending approval in Coupa by Morningstar/PitchBook.

Admin Users			Invite User
Users	Permissions	Customer Access	
Coupa T coupatest2019+05@gmail.com <input type="button" value="Edit"/>	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	Morningstar - Test123 Morningstar - Coupa - CSP Profile	
NA NA coupatest.062019@gmail.com <input type="button" value="Edit"/>	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	Morningstar - Test123	
pooja bhoir pooja.bhoir@morningstar.com <input type="button" value="Edit"/>	ASNs Admin Catalogs Invoices Order Changes Orders - Restricted Access to Orders	Morningstar - First Email Content Morningstar - R27 new supplier testing Morningstar - R27 Address Instruction Morningstar - R27 SIM Guidelines Morningstar - Test123 Morningstar - R26-Test	

- Selecting the **"Admin"** icon from the menu will take you to a screen where you can administer the users, general company information, merge requests with already existing CSP portals for your company, and remit to addresses for the CSP.
- Each company will have one specific CSP administrator. This is typically the person who received the invitation request from Morningstar/PitchBook.

- Selecting **“Users”** will provide functionality to add other users in your company to utilize the CSP. You can set their permissions and the customers they can view. You can also transfer the administrative role to another user in your company.
- Selecting **“Merge Requests”** will allow you to merge with any other CSP profiles from your company. This may happen if you have many divisions and customers using Coupa. Use this feature to keep them all together in the CSP.
- Selecting **“Remit To”** allows you to add or change your remit to address in the CSP.

My Account

Selecting the **“Account Settings”** option from the dropdown under your name will take you to a screen where you can change your log-in information for the CSP.

- In this screen you can add a photo, change your name, e-mail address and password.
- Selecting the **“Log Out”** icon from the dropdown under your name will log you out of the CSP and bring you back to the log-in screen.

Thank You