

**BlackRock**®

# **Supplier Onboarding & Registration in Coupa**

# Contents

- **Supplier Information Management (SIM) for New Suppliers** **3**
    - ✓ Onboarding Requirements for New Suppliers
    - ✓ Quick Reference Guide for New Suppliers
  - **Supplier Information Management (SIM) for Existing Suppliers** **22**
    - ✓ Quick Reference Guide for Existing Suppliers
- 

**If chosen as a BlackRock supplier, you will go through eight steps to become an approved vendor: Onboarding, Financial, Risk & Operational Diligence, Contract Negotiations & Reviews, Internal Approvals, Contract Signatures, Purchase Order, Invoicing and Payment.**

After registering on [Coupa Supplier Portal](#), you'll be able to view contracts and purchase orders with BlackRock. BlackRock strives to make its invoicing and payment processes as efficient as possible via the use of Purchase Orders. Invoicing against Purchase Orders (PO), also known as PO-Backed invoices, supports a streamlined end-to-end invoice process in Coupa.

If there are any questions, please reach out to BlackRock Supplier Maintenance and/or Sourcing & Vendor Management by clicking [here](#). **More resources can be found on BlackRock for Suppliers (click on back button) or go directly on the [Coupa website](#).**

# Supplier Information Management (SIM)

Quick Reference Guide for New Suppliers

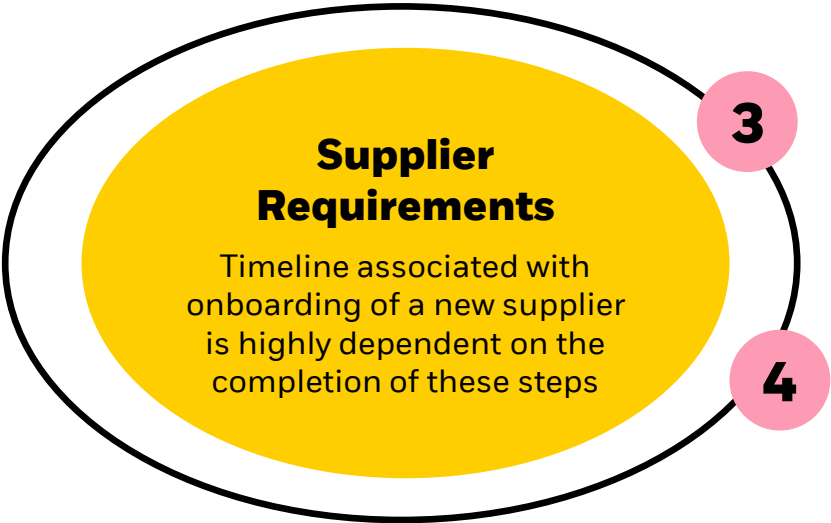
# Onboarding Requirements for New BlackRock Suppliers

## Confirm Scope Requirements & Cost Allocation

BlackRock must confirm requirements, scope of services and cost allocation details

## Complete Risk Assessment(s)

BlackRock suppliers are required to undergo financial, risk and operational diligence prior to doing business with BlackRock



## Register as a Supplier with BlackRock

Suppliers are required to register with BLK and provide banking and tax details via Coupa Supplier Portal

## Agree to BlackRock's contractual terms & conditions

Suppliers are required to provide details on their control environment, depending on potential risk, as well as agree to BLK terms & conditions

# AGENDA



**Register in Coupa**

**Setup Profile**

**Rejected Profile**

**Frequently Asked Questions**

## Become a BlackRock Supplier | Register by Email Invite

We have partnered with Coupa to deliver an ordering and invoicing platform to our suppliers. Coupa is an intuitive and user friendly system that provides greater visibility into purchase orders and invoices – **at no cost to you**. If you are a supplier who is interested in doing business with BlackRock, you are required to register on [Coupa](#) to provide your organization's general and banking information.

Once registered to the [Coupa Supplier Portal \(CSP\)](#), a free tool for suppliers to easily do business with BlackRock, you will be able to:

- Receive and view purchase orders & contracts
- Create, view, and send invoices
- Manage your public and customer-specific company profiles and remit-to information
- Check the status of transactions with your customers such as BlackRock

As a first step, an invitation by email should have been received from BlackRock to the Coupa Supplier Portal. **Next please read through this guide to help you connect with BlackRock promptly without errors or delays.** If there are any questions when filling out the form, please reach out to BlackRock Supplier Maintenance team by clicking [here](#).

# STEP 1: REGISTRATION

## Invitation by email

To become a new Supplier of BlackRock, an invitation by email should have been received. As a next step, submit your company information (incl. banking information) via Coupa. **Information received in any other form or format will not be accepted by BlackRock.**

1. You will receive an email from Coupa titled 'Request for Information from BlackRock' from BlackRock [do\\_not\\_reply@blackrock.coupa.com](mailto:do_not_reply@blackrock.coupa.com).
  - ❖ If you are already a user of Coupa, the email might be titled 'You are Connected to BlackRock on Coupa'. We still need you to follow the process shown in this training deck in order to confirm your company/bank information.
2. Click on **'Join and Respond'**

Request for Information from BlackRock

Powered by 

Dear Supplier,

As a potentially new supplier to BlackRock, it is required that we collect mandatory information on your company - including contact details, tax information and banking details - as part of our on-boarding process and prior to the commencement of services and payment of any invoices. To facilitate the information collection process, issue Purchase Orders and pay invoices, BlackRock exclusively uses Coupa's Procure to Pay platform.

As an initial step, please register for the Coupa Supplier Portal (CSP) by clicking on 'Join and Respond' below (or 'Login' if you have already registered). Upon registering you will be prompted to complete the required Supplier Profile form with BlackRock. On the Profile page within the CSP, please make sure you select the 'BlackRock' profile from the drop down list.

If you have any questions for BlackRock, please reach out to [suppliermaintenance@blackrock.com](mailto:suppliermaintenance@blackrock.com)

If you are having technical issues with Coupa, please reach out to [supplier@coupa.com](mailto:supplier@coupa.com)

By registering for the Coupa Supplier Portal (CSP) and linking with BlackRock you'll be able to:

1. View real-time progress of submitted invoices
2. Manage your company information
3. Configure your PO transmission preferences
4. View Purchase Orders
5. Create electronic invoices
6. Create an online catalog, if applicable

Please note that failure to provide required information and submit any future invoices via the Coupa portal may result in significant processing delays.

Thank you as we look forward to your partnership!

BlackRock

2

**Join and Respond**

Respond Without Joining

- ✓ Bookmark the Coupa CSP address for future use:

<https://supplier.coupa.com/>

# STEP 1: REGISTRATION

## Join Coupa

3. In the Coupa Supplier Portal (CSP) registration page, complete the required fields and click on 'Submit'.
  - If you are already registered to Coupa (for other clients), you will only need to log into the CSP.
  - If the registration should be handled by a colleague, please enter his/her email address in the 'Forward your Invitation' and click 'Submit'
4. Once your account is created, you will reach the CSP homepage.

### Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

\* First Name

\* Last Name

\* Company

\* Email

\* Password

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

\* Password Confirmation

3

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Submit

### Forward your invitation

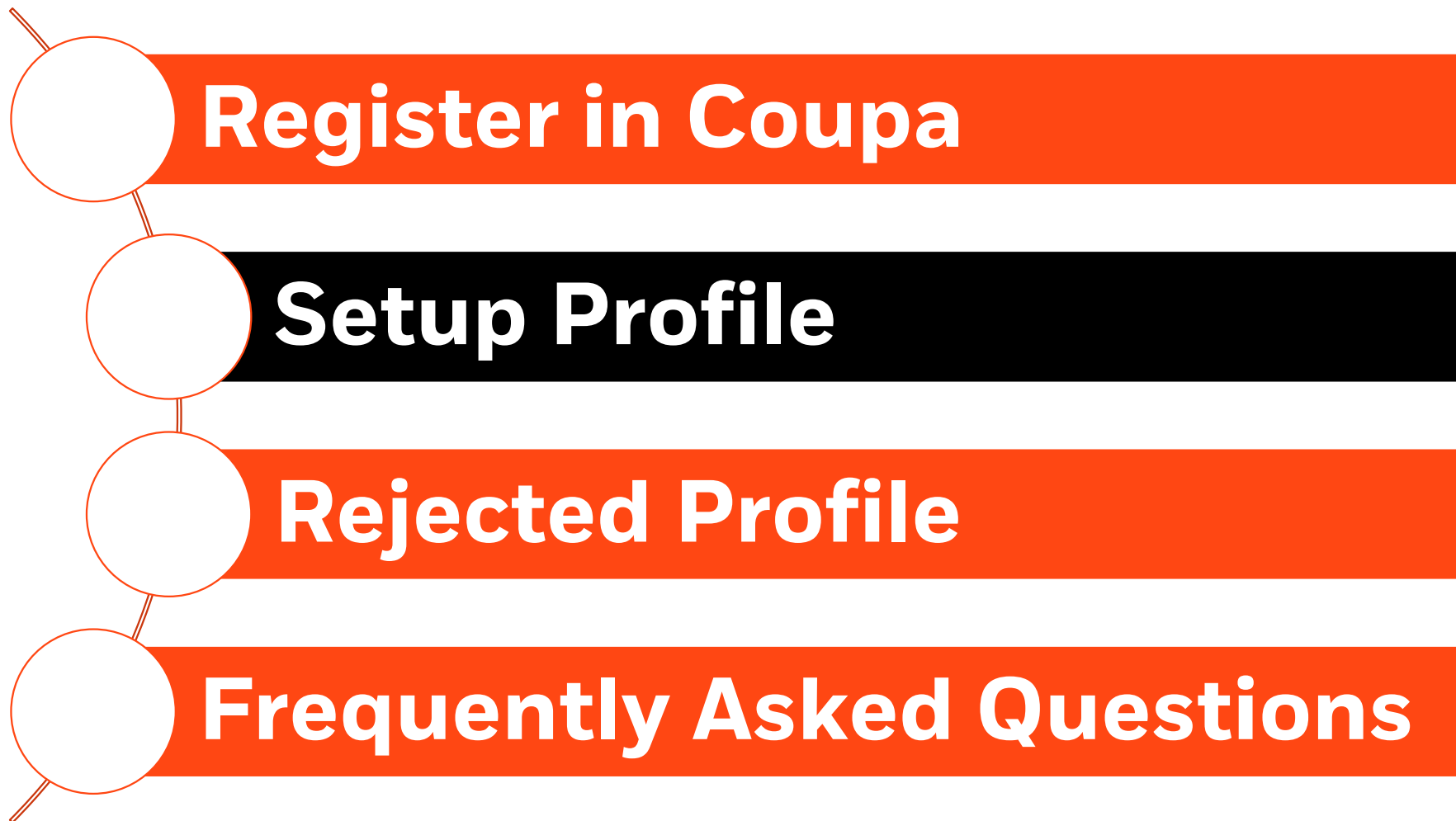
Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).

Forward email

Submit



# AGENDA



# STEP 2: SETUP YOUR PROFILE

## Setup your Profile in Coupa for BlackRock

1. In the **Profile** tab, click on **Your Customer Profiles** and select the Profile for **BlackRock**
  - Please note it might take a few minutes for this page to load- please be patient.

### Complete the 'General Information' Section

2. Update the Supplier Name to reflect your invoicing entity name. If correct, leave as is.
3. Enter the currency you (mostly) invoice BlackRock in
4. Complete the additional fields (optional) for a complete profile

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Your Public Profile **Your Customer Profiles**

Profile BlackRock

Supplier Information Test New Supplier Inc

Please complete all applicable information before submitting this form. This request may be rejected back to you by BlackRock's Supplier Maintenance Team if incomplete or incorrect.

General Information

2 \* Supplier Name Test New Supplier Inc

Alternate Supplier Name This field is MANDATORY for China, Japan & Taiwan (in local language).

Federal Tax ID

International Tax ID Where applicable please provide your VAT, GST, ABN, PAN or GUI ID.

3 \* Invoicing Currency

Are you a diverse supplier?  if you are a certified diverse supplier, please ensure you tick this box.

DUNS Number

Ensure 'BlackRock' is selected here

Update, if necessary, to reflect the correct legal entity name

Update currency to the invoicing Currency

# STEP 2: SETUP YOUR PROFILE

## Setup your Profile in Coupa for BlackRock

5. Confirm you comply with the BlackRock Supplier Code of Conduct located here: <https://www.blackrock.com/corporate/literature/publication/blackrock-supplier-code-of-conduct-and-ethics.pdf>.

*All policies relating to Doing Business with BlackRock can be found on BlackRock Corporate website: <https://www.blackrock.com/corporate/about-us/suppliers>.*

- 5 BlackRock expects its service providers which supply goods, materials or services to maintain minimum standards in relation to human rights, inclusion and diversity, environmental sustainability, integrity and ethics in management practices as defined in our Supplier Code of Conduct found here: <https://www.blackrock.com/us/individual/literature/publication/blackrock-supplier-code-of-conduct-and-ethics.pdf>

\* By checking this box   
you confirm that you  
comply with the above  
BlackRock Supplier  
Code of Conduct

---

# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

### Complete the 'Primary Contact Details' Section

6. Enter your First and Last Name
7. Enter your email address
8. Add any additional contact that supports the BlackRock account

### Complete the 'Remit To Address' Section



9. Click on 'Add' to add your remit to address.

Failure to do so will not allow you to connect successfully to BlackRock

#### Primary Contact Details

This section should contain the details of your primary point of contact. The email address given below will be used to issue purchase orders in the first instance, as well as invoice remittance. If you register for the CSP you will be able to manage additional users.

The supplier's main contact details should be captured below. The email address entered will be used to send the supplier the request to on-board with BlackRock through Coupa.

6 \* First Name

\* Last Name

7 \* Email address

Work Phone

#### 8 Additional Contact Details

Please use this section to provide details of any additional contacts (for example account manager, if different from primary contact).

\* First Name

\* Last Name

\* Email Address

#### Remit-To Address Lines

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

9

Please ensure you have clicked on 'Add' above, to add your address and banking information before continuing. Failure to do this will result in your form being rejected by BlackRock.

\* Please confirm you  have clicked on 'Add' above?



# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

Complete the 'Remit To Address' Section

10. Click on 'Create New'
11. Enter your company's **Legal Entity Name** (same as that will be shown on invoice)
12. Enter the **Country** that the company is registered in
  - Please note that depending the country selected, additional fields might be required.
13. Click on **Continue**

### 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 you customer's form manually.*

Create new Compliant Remit-To Address 10

+ Create New

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.

11 \*Legal Entity Name

12 Country

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

13 Cancel Continue

# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

14. Complete all the Required Fields including Bank Information

15. Click on **Done**

Which customers do you want to see this?

- All
- BlackRock

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

Banking information

Bank Account Country: United States

Bank Account Currency:

Bank Name:

Beneficiary Name:

### RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't

Account Number

Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

Bank address

Address Line 1:

Address Line 2:

City:

State: Select an Option

Postal Code:

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

Done

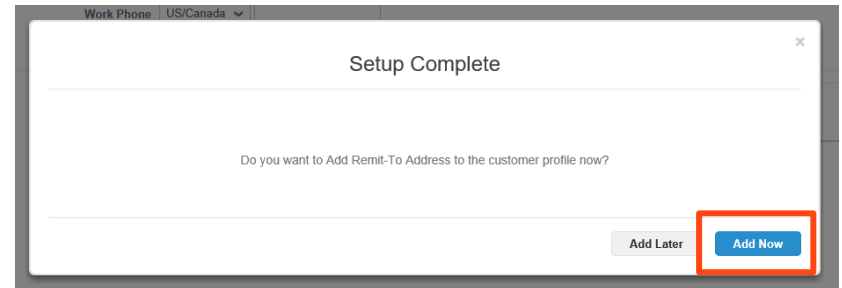
# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

16. Click on 'Add Now'

17. The form will be updated with additional 'Banking Details' fields for the new Remit To Address you just setup. Complete the required\* fields.

- If the Banking Details section (see screenshot below) does not appear, click on Add *again* and then 'Choose'



16

### 17 Banking Details

Please ensure this section is complete with the fields correctly populated. Because this is a global process, some fields may not appear to be mandatory, but for your jurisdiction will be applicable. Failure to provide the correct information will delay BlackRock's on-boarding process.

\* Bank Name

\* Bank Account Name

\* Bank Account Number   
Please note for Mexico, you should provide your CLABE number (Bank + Branch Code).

Branch Code  ⓘ  
Also known regionally as Routing Number, ABA Number, Transit Number, IFSC Code.

Sort Code  ⓘ  
This field is MANDATORY for the UK.

BSB Number  ⓘ  
This field is MANDATORY for Australia.

SWIFT Code (BIC)  ⓘ

IBAN Number  ⓘ

Account Type   
This field is MANDATORY for Japan.

Please ensure you have clicked on 'Add' above, to add your address and banking information before continuing. Failure to do this will delay the on-boarding process.

- \* Please confirm you  have clicked on 'Add' above?

18. If applicable for your jurisdiction, complete the 'Additional Banking Details' fields

- For US, pls confirm if you accept ACH payment

### 18 Additional Banking Details

Supplementing the above section, BlackRock also require the below banking information to be provided (dependant on local jurisdiction as outlined below).

- \* Please confirm if you accept ACH payment?  Yes  No / Not Applicable

Branch Name

Alternate Bank Name

This field is MANDATORY to Japan (half with katakana) language).

Alternate Branch Name

This field is MANDATORY to Japan (half with katakana) language).

Alternate Bank Account Name

This field is MANDATORY to Japan & Taiwan (in local language).

Bank Code

This field is MANDATORY to Canada, China, Hong Kong, Japan, Korea, Singapore & Taiwan.

Check Digits

# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

19. Attach any mandatory documentation as listed in the **Supporting Documentation Section**, e.g. W9 for a US based supplier
20. Click on **'Save'**
21. Click on **'Submit for Approval'**

### Supporting Documentation

Please use this to include any applicable documentation (for example W8, W9, PANCARD COPY, Cancelled Cheque).

1. If you are a US based supplier and will be billing BlackRock in the US, a W9 is mandatory.
2. If you are a non-US based supplier and will be billing BlackRock in the US, a W8 is mandatory. In addition please also ensure the following are provided:
  - a) Foreign Taxpayer Identification Number (TIN)
  - b) Claim of tax treaty benefits (if applicable)
  - c) confirmation if activities will be performed outside the US.

Without the appropriate documentation, payment cannot be made.

Attachment   **19**  
Please note, only 1 attachment can be added.

**20**  
Decline

**20**  
Save

**21**  
**Submit for Approval**



# STEP 2: SETUP PROFILE

## Setup your Profile in Coupa for BlackRock

### Was your information submitted correctly to BlackRock?

✓ Check 1: Did you receive an email from Coupa stating 'Profile Info Recently Updated for BlackRock on Coupa'

Profile BlackRock - DAVINIA TEST SUPPLIER 1

✓ Check 2: Scroll to the top of the screen. Do you see 'Pending Approval'?

- Or do you see the error message 'Please fix the entries below'? If so, fill out the highlighted fields and click 'Submit for Approval' again

Supplier Information DAVINIA TEST SUPPLIER 1

Pending Approval

Please fix the errors below

Once both checks are successful, it means the Form has reached BlackRock. **Thank you!**

As a next step, the BlackRock Supplier Maintenance team will review and:

- Approve your form, if all information is available. No further action needed.
- Reject it back to you if there is missing information (see pg 16 for more detail on rejections)

As a final step, click on 'Not Now' or 'Yes, Copy to Profile', as desired. We recommend to click on 'Yes, Copy to Profile'

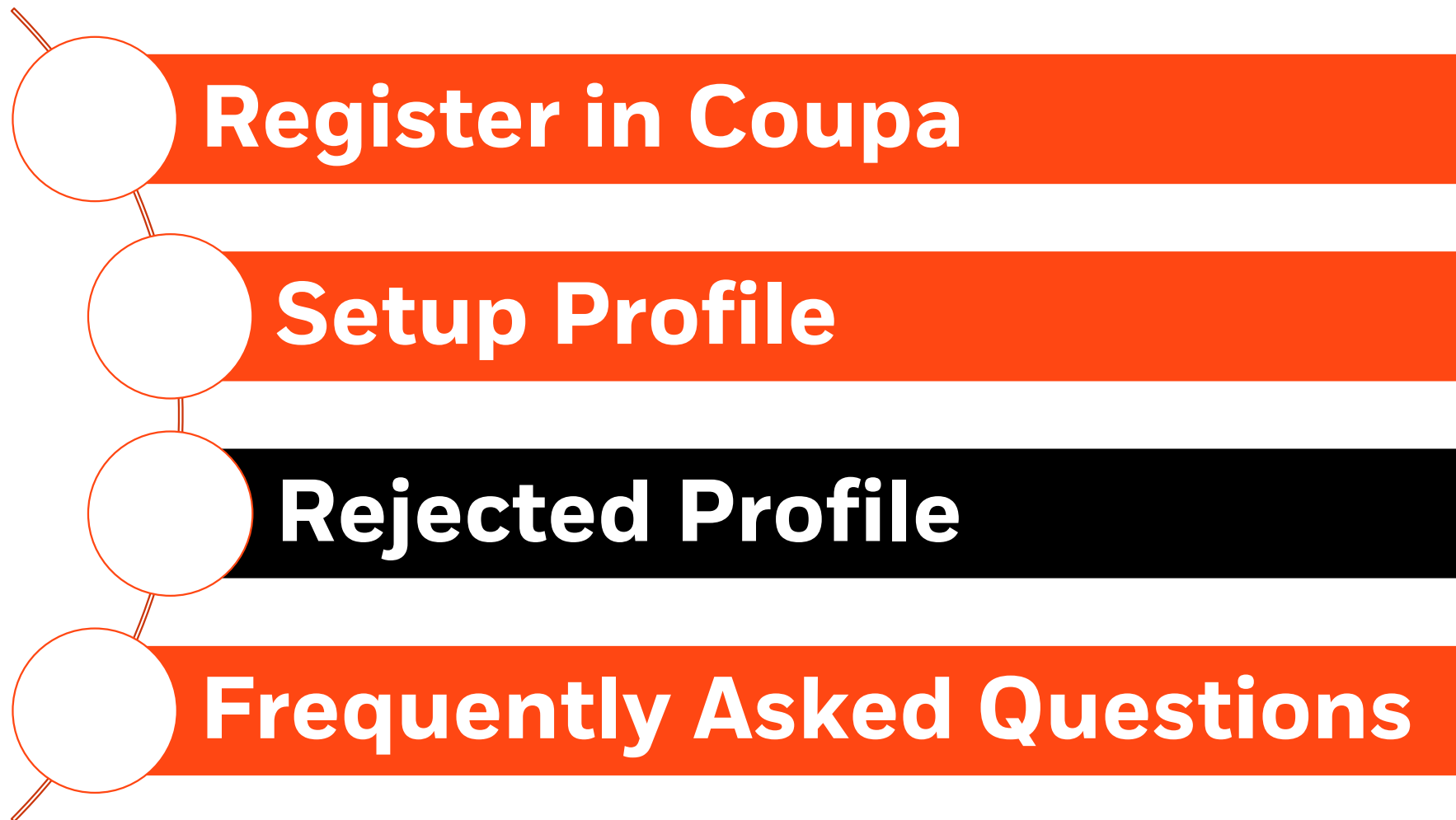
Save This Information to Your Public Profile?

With a complete and current profile, you can:

- Get discovered by Coupa's buying community
- Help your other Coupa buyers link to your account
- Set early pay discounts and more

Not Now Yes, Copy to Profile

# AGENDA



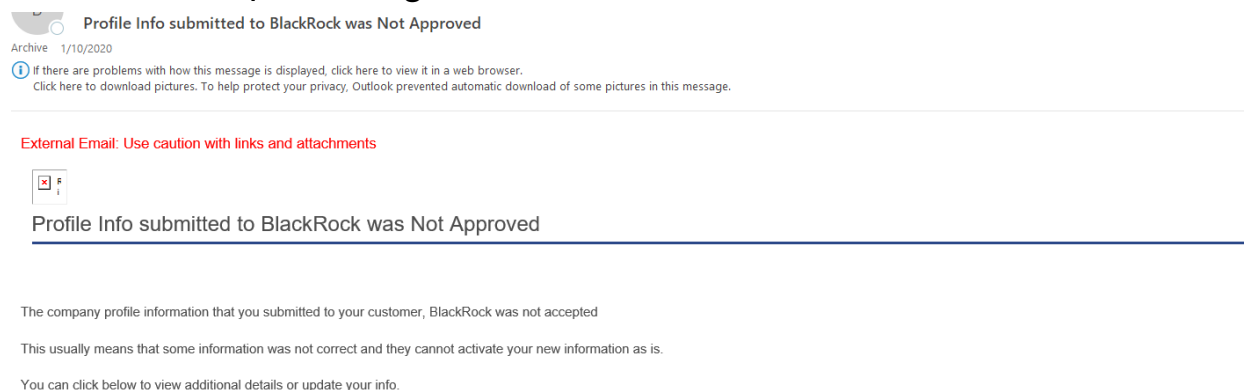
# STEP 3: FIX REJECTED PROFILE

## Update your Profile if rejected by BlackRock

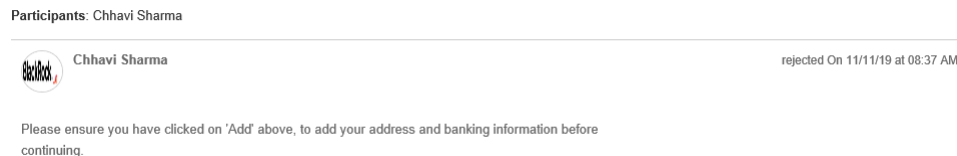
After Submitting the Supplier Information Form to BlackRock, the Supplier Maintenance team reviews it for completeness and accuracy.

If there is any mandatory information or supporting documentation missing, your form will be Rejected.

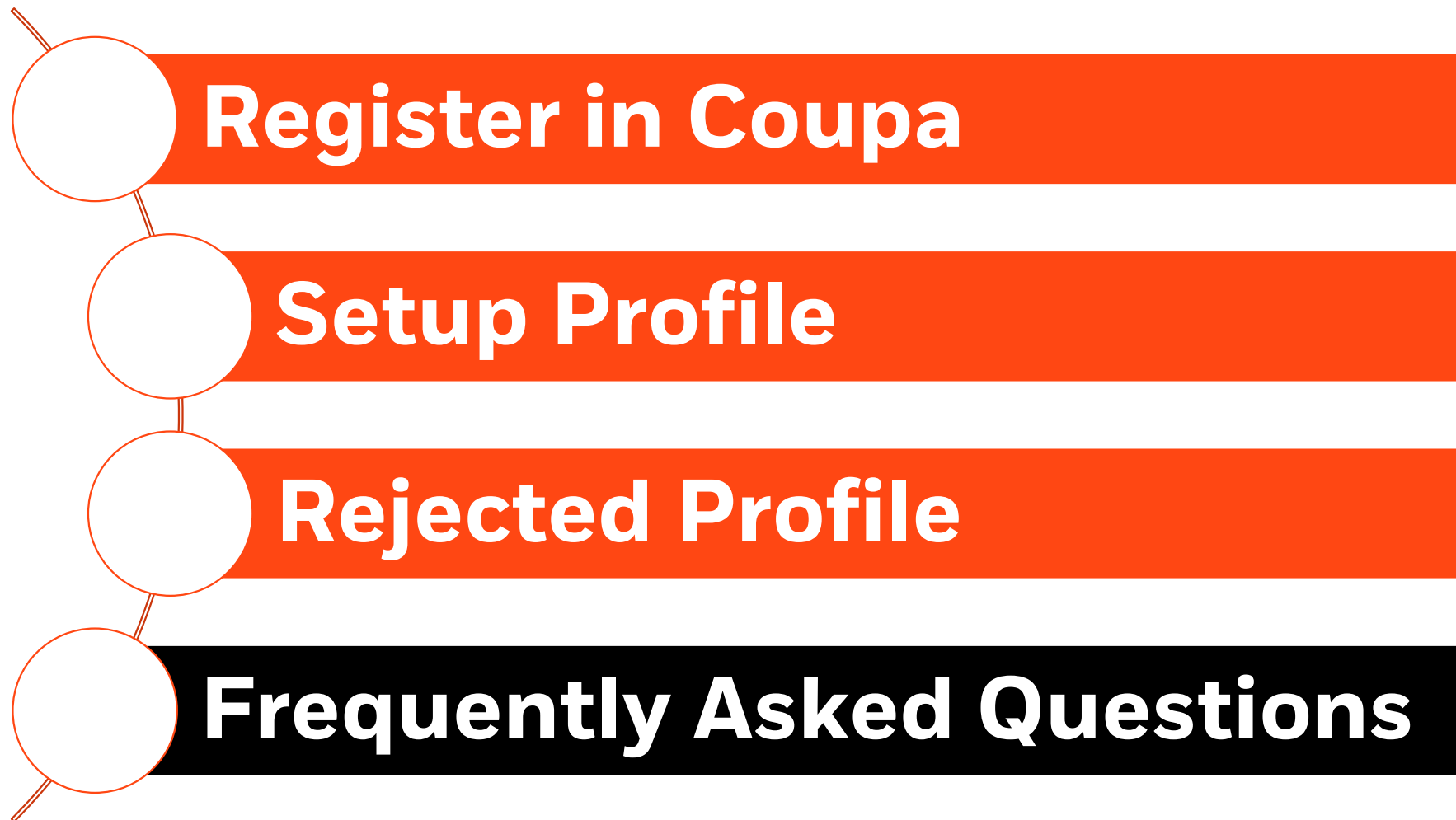
1. You will receive an email from Coupa stating *'Profile Info submitted to BlackRock was not Approved'*



2. Click on Update Info, or log into Coupa (<https://supplier.couphost.com/>)
3. Go to the Profile Tab again and click on Client 'BlackRock'.
4. Scroll down to the Comments section to view the comment from BlackRock (see example)
5. Update the information and 'Submit For Approval' again
6. Check if Profile update was successful (see page 14 for details)



# AGENDA



# Frequently Asked Questions

- **Where do I sign in to the CSP?**

- <http://supplier.coupa.com>

- **What happens if I forget my login?**

- Forgotten passwords can be retrieved via the forgotten password link on the CSP. Why don't I get the password reset emails? Check your spam/junk email folder. E-mails sometimes get flagged as spam. If you still cannot find the email, write to [supplier@coupa.com](mailto:supplier@coupa.com).

- **What is SIM?**

- As part of the supplier on-boarding process at BlackRock, BlackRock Coupa users initiate the New Supplier Request Form via SIM (Supplier Information Management). SIM is a Coupa tool to request, approve and maintain information about BlackRock's suppliers.

- **I do not see 'BlackRock' under Profile?**

- In order to see BlackRock as a client in the Profile Tab, you need have received an invitation from BlackRock to Coupa (by email). If you haven't, please contact [suppliermaintenance@blackrock.com](mailto:suppliermaintenance@blackrock.com).
- If you provide BlackRock with the same email address that you use to connect to your other Coupa customer(s) via the CSP, BlackRock will send you an invitation to that e-mail to join. Once you confirm the new connection request, you are automatically connected to BlackRock and your previous customers within the CSP.

- **Where do I complete the information?**

- Go to the Profile tab and follow the instructions on Pg. 7 of this training deck.
- Alternatively, log into the CSP and go to Notifications and click on 'Update your profile for BlackRock' and fill out the form. Click Submit for Approval. If you want to save a draft now and continue to work on the form later, click on Save instead.

- **I completed the form, but BlackRock cannot see it.**

- If BlackRock has not received it, you probably did not complete the form in its entirety. Pls see pg 13 for details on how to correct and resubmit.

- **BlackRock rejected my form. How to I fix?**

- Please see pg. 15 of this training deck for details.

- **My company details have changed. Do I update them via the CSP?**

- No, at the moment SIM is currently only being used for new supplier setup. Please send any updates directly to [Suppliermaintenance@blackrock.com](mailto:Suppliermaintenance@blackrock.com).

# **Supplier Information Management (SIM)**

Quick Reference Guide for Existing Suppliers

# Creating an Account with BlackRock on Coupa

## Instructions for Suppliers being onboarded by BlackRock.

If you're already a BlackRock supplier but are not registered on Coupa. To set you up as a new supplier of BlackRock, we require you complete the Supplier Information Onboarding Form (in Coupa).

- You will receive an email from the Coupa Supplier Portal ([do\\_not\\_reply@supplier.coupahost.com](mailto:do_not_reply@supplier.coupahost.com)) inviting you to register and join the CSP. *Ensure your organization can receive emails from Supplier.Coupahost.com.*
- In the email, Click on 'Join Coupa' to access the CSP registration page.
- In the Coupa Supplier Portal registration page, complete the required fields and click on 'Submit'.
- Once your account is created, you will reach the CSP homepage.
- **Bookmark the Coupa CSP address for future use:** <https://supplier.coupahost.com/>.

Action Required from BlackRock - Click Below to Join Coupa



Hello Supplier,

BlackRock wants to connect with you on Coupa. Once registered you can do things with BlackRock (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Coupa's Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!

Simon Todd  
BlackRock

[Join Coupa](#) [Forward This](#)

[Overview](#) Learn more about the Coupa Supplier Portal   [Need Help?](#) Answers to common questions and issues   [Coupa Info](#) Learn more about how companies use Coupa



### Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

\* First Name

\* Last Name

\* Company

\* Email

\* 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](#).

[Submit](#)

### Forward your invitation

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).

Forward email

[Submit](#)

# Creating an Account with BlackRock on Coupa (Cont.)

The screenshot shows the Coupa supplier portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. The user is logged in as 'DAVINIA' and has 0 notifications. The main navigation menu includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. A red banner indicates an 'Action needed' to complete the profile. Below this, there is a 'Profile Progress' section showing 8% completion and a 'Last Updated' timestamp of 6 minutes ago. The main content area is titled 'BLK Supplier Training' and features a globe icon and several menu items: Website, Industry, About, Established, and Employees. A language selection dropdown menu is open, listing various languages and regions. The 'English (US)' option is highlighted with a red box. Other visible options include Dansk (Danmark), Deutsch (Belgien), Deutsch (Deutschland), Deutsch (Luxemburg), Deutsch (Schweiz), Deutsch (Österreich), English (Australia), and English (Canada). The footer contains copyright information for Coupa Software Incorporated and links to Privacy Policy and Terms of Use.

To change the language:

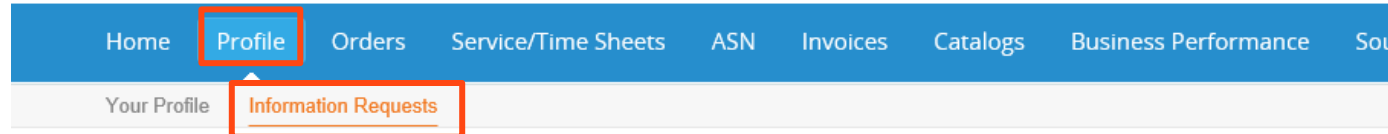
1. Click the English (US) link at the bottom of the Coupa homepage.
2. Select your language from the list.



# Creating an Account with BlackRock on Coupa (Cont.)

## Setup your Profile in Coupa for BlackRock

1. In the **Profile** tab, click on **Information Requests** and select the Profile for **BlackRock**
  - Please note it might take a few minutes for this page to load.



### Complete the 'General Information' Section

2. Update the Supplier Name to reflect your invoicing entity name. If correct, leave as is.
3. Enter the currency you (mostly) invoice BlackRock in
4. Confirm compliance with BlackRock's Supplier Code of Conduct

Profile:  ← Ensure 'BlackRock' is selected here

---

#### General Information

**2** \* Supplier Name  ← Update, if necessary, to reflect the correct legal entity name

Alternate Supplier Name   
This field is MANDATORY for China, Japan & Taiwan (in local language).

Federal Tax ID  i

International Tax ID   
Where applicable please provide your VAT, GST, ABN, PAN or GUI ID.

**3** \* Invoicing Currency:  ← Update currency to the invoicing Currency

Are you a diverse supplier?   
if you are a certified diverse supplier, please ensure you tick this box.

DUNS Number  i

**4**  \* By checking this box you confirm that you comply with the above BlackRock Supplier Code of Conduct

BlackRock expects its service providers which supply goods, materials or services to maintain minimum standards in relation to human rights, inclusion and diversity, environmental sustainability, integrity and ethics in management practices as defined in our Supplier Code of Conduct found here: <https://www.blackrock.com/us/individual/literature/publication/blackrock-supplier-code-of-conduct-and-ethics.pdf>

# Creating an Account with BlackRock on Coupa (Cont.)

## Complete the 'Primary Contact Details' Section

5. Enter your First and Last Name
6. Enter your email address
7. Add any additional contact that supports the BlackRock account

## Complete the 'Remit To Address' Section



8. Click on 'Add' to add your remit to address.

Failure to do so will not allow you to connect to BlackRock successfully.

### Primary Contact Details

This section should contain the details of your primary point of contact. The email address given below will be used to issue purchase orders in the first instance, as well as invoice remittance. If you register for the CSP you will be able to manage additional users.

The supplier's main contact details should be captured below. The email address entered will be used to send the supplier the request to on-board with BlackRock through Coupa.

5 \* First Name

\* Last Name

6 \* Email address

Work Phone

### 7 Additional Contact Details

Please use this section to provide details of any additional contacts (for example account manager, if different from primary contact).

\* First Name

\* Last Name

\* Email Address

### Remit-To Address Lines

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

8

Please ensure you have clicked on 'Add' above, to add your address and banking information before continuing. Failure to do this will result in your form being rejected by BlackRock.

\* Please confirm you  have clicked on 'Add' above?



# Creating an Account with BlackRock on Coupa (Cont.)

Complete the 'Remit To Address' Section

9. Click on 'Create New'
10. Enter your company's **Legal Entity Name** (same as that will be shown on invoice)
11. Enter the **Country** that the company is registered in
  - Please note that depending the country selected, additional fields might be required.
12. Click on **Continue**

**Choose Remit-To Address** [X]

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 you customer's form manually.*

Create new Compliant Remit-To Address **9** + Create New

Where's your business located? [X]

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.

**10** \*Legal Entity Name

**11** Country

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

Cancel **12** Continue

# Creating an Account with BlackRock on Coupa (Cont.)

13. Complete all the Required Fields including Bank Information

14. Click on **Done**

Which customers do you want to see this?

- All
- BlackRock

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

Banking information

Bank Account Country: United States

Bank Account Currency:

Bank Name:

Beneficiary Name:

### RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't

Account Number

Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

Bank address

Address Line 1:

Address Line 2:

City:

State: Select an Option

Postal Code:

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:

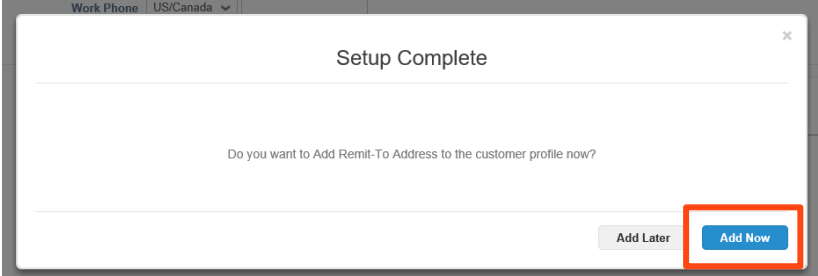
Preferred Language: English (US)

# Creating an Account with BlackRock on Coupa (Cont.)

15. Click on 'Add Now'

16. The form will be updated with additional 'Banking Details' fields for the new Remit To Address that was setup. Complete the *required*\* fields.

- If the Banking Details section (see screenshot below) does not appear, click on *Add again* and then 'Choose'



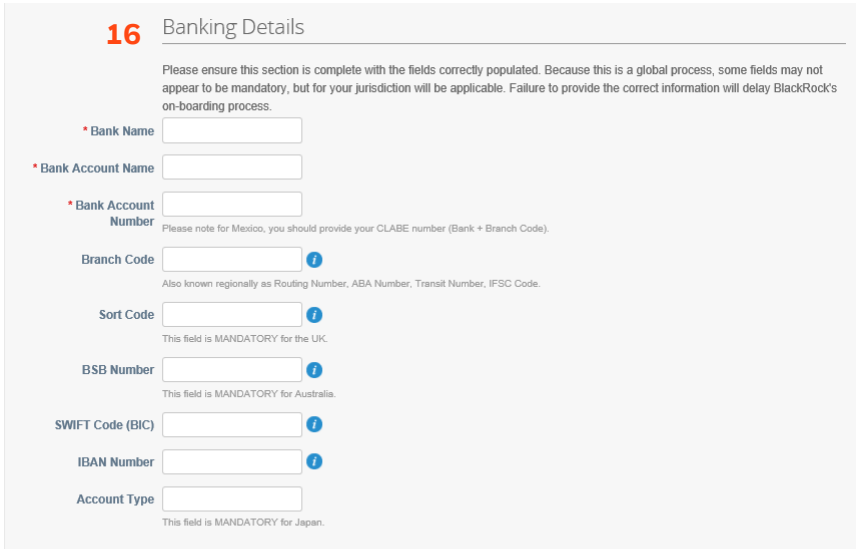
Work Phone | US/Canada

### Setup Complete

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

Add Later **Add Now**

15



### 16 Banking Details

Please ensure this section is complete with the fields correctly populated. Because this is a global process, some fields may not appear to be mandatory, but for your jurisdiction will be applicable. Failure to provide the correct information will delay BlackRock's on-boarding process.

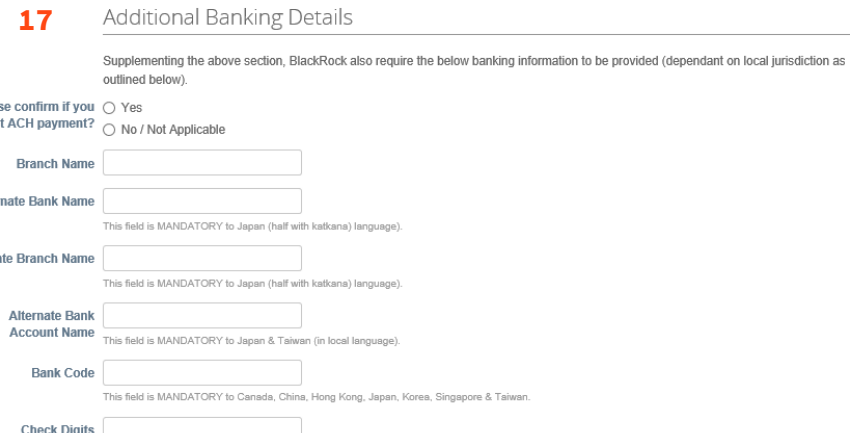
- \* Bank Name
- \* Bank Account Name
- \* Bank Account Number  
Please note for Mexico, you should provide your CLABE number (Bank + Branch Code).
- Branch Code  
Also known regionally as Routing Number, ABA Number, Transit Number, IFSC Code.
- Sort Code  
This field is MANDATORY for the UK.
- BSB Number  
This field is MANDATORY for Australia.
- SWIFT Code (BIC)
- IBAN Number
- Account Type  
This field is MANDATORY for Japan.

Please ensure you have clicked on 'Add' above, to add your address and banking information before continuing. Failure to do this will delay the on-boarding process.

\* Please confirm you have clicked on 'Add' above?

17. If applicable for your jurisdiction, complete the 'Additional Banking Details' fields

- For US, pls confirm if you accept ACH payment



### 17 Additional Banking Details

Supplementing the above section, BlackRock also require the below banking information to be provided (dependant on local jurisdiction as outlined below).

\* Please confirm if you accept ACH payment?  Yes  No / Not Applicable

- Branch Name
- Alternate Bank Name  
This field is MANDATORY to Japan (half with katakana) language.
- Alternate Branch Name  
This field is MANDATORY to Japan (half with katakana) language.
- Alternate Bank Account Name  
This field is MANDATORY to Japan & Taiwan (in local language).
- Bank Code  
This field is MANDATORY to Canada, China, Hong Kong, Japan, Korea, Singapore & Taiwan.
- Check Digits

# Creating an Account with BlackRock on Coupa (Cont.)

18. Attach any mandatory documentation as listed in the **Supporting Documentation Section**, e.g. W9 for a US based supplier
19. Click on **'Save'**
20. Click on **'Submit for Approval'**

## Supporting Documentation

Please use this to include any applicable documentation (for example W8, W9, PANCARD COPY, Cancelled Cheque).

1. If you are a US based supplier and will be billing BlackRock in the US, a W9 is mandatory.
2. If you are a non-US based supplier and will be billing BlackRock in the US, a W8 is mandatory. In addition please also ensure the following are provided:
  - a) Foreign Taxpayer Identification Number (TIN)
  - b) Claim of tax treaty benefits (if applicable)
  - c) confirmation if activities will be performed outside the US.

Without the appropriate documentation, payment cannot be made.

Attachment  Browse... **18**  
Please note, only 1 attachment can be added.

Decline

**19**

Save

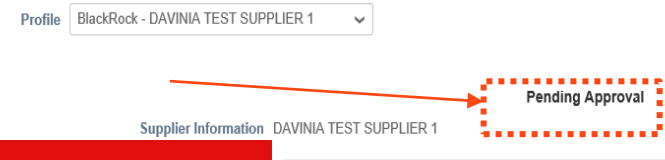
**20**

Submit for Approval

# Creating an Account with BlackRock on Coupa (Cont.)

## Was your information submitted correctly to BlackRock?

- ✓ Check 1: Did you receive an email from Coupa stating 'Profile Info Recently Updated for BlackRock on Coupa'?
- ✓ Check 2: Scroll to the top of the screen. Do you see 'Pending Approval'?
  - Or do you see the error message 'Please fix the entries below'?  
If so, fill out the highlighted fields and click 'Submit for Approval' again



Once both checks are successful, it means the form has reached BlackRock. Thank you!

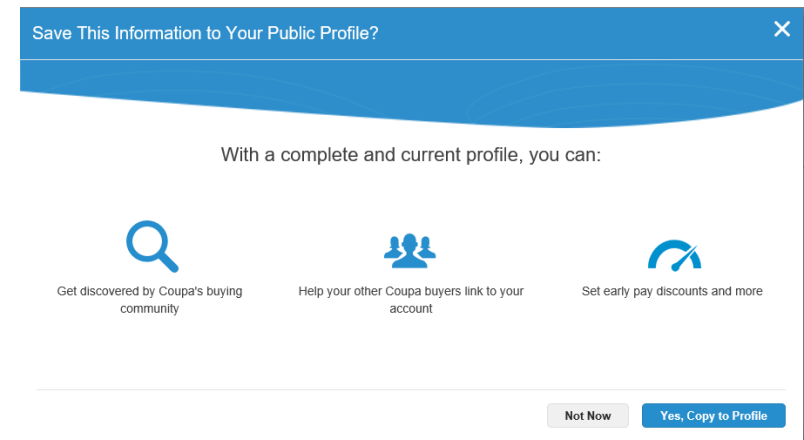
The BlackRock team will review and:

- Approve your form, if all information is available. No further action needed from you.
- Reject it back to you if there is missing information. If there are rejections, please follow same steps designated above.

As a final step, click on 'Not Now' or 'Yes, Copy to Profile', as desired. We recommend to click on 'Yes, Copy to Profile'.

If there are any questions, please reach out to BlackRock Supplier Maintenance by clicking [here](#).

**More resources can be found on BlackRock for Suppliers (click on back button) or go directly on the [Coupa website](#).**



# Frequently Asked Questions

- **Where do I sign in to the CSP?**

- <http://supplier.coupa.com>

- **What happens if I forget my login?**

- Forgotten passwords can be retrieved via the forgotten password link on the CSP. Why don't I get the password reset emails? Check your spam/junk email folder. E-mails sometimes get flagged as spam. If you still cannot find the email, write to [supplier@coupa.com](mailto:supplier@coupa.com).

- **What is SIM?**

- As part of the supplier on-boarding process at BlackRock, BlackRock Coupa users initiate the New Supplier Request Form via SIM (Supplier Information Management). SIM is a Coupa tool to request, approve and maintain information about BlackRock's suppliers.

- **I do not see 'BlackRock' under Profile?**

- In order to see BlackRock as a client in the Profile Tab, you need have received an invitation from BlackRock to Coupa (by email). If you haven't, please contact [suppliermaintenance@blackrock.com](mailto:suppliermaintenance@blackrock.com).
- If you provide BlackRock with the same email address that you use to connect to your other Coupa customer(s) via the CSP, BlackRock will send you an invitation to that e-mail to join. Once you confirm the new connection request, you are automatically connected to BlackRock and your previous customers within the CSP.

- **Where do I complete the information?**

- Go to the Profile tab and follow the instructions on Pg. 7 of this training deck.
- Alternatively, log into the CSP and go to Notifications and click on 'Update your profile for BlackRock' and fill out the form. Click Submit for Approval. If you want to save a draft now and continue to work on the form later, click on Save instead.

- **I completed the form, but BlackRock cannot see it.**

- If BlackRock has not received it, you probably did not complete the form in its entirety. Pls see pg 13 for details on how to correct and resubmit.

- **BlackRock rejected my form. How to I fix?**

- Please see pg. 15 of this training deck for details.

- **My company details have changed. Do I update them via the CSP?**

- No, at the moment SIM is currently only being used for new supplier setup. Please send any updates directly to [Suppliermaintenance@blackrock.com](mailto:Suppliermaintenance@blackrock.com).