Supplier onboarding guidance

Welcome to the Pearson Supplier Onboarding Process! This document is designed to help you through the onboarding process without joining the Coupa portal.

You will receive an email invitation from Pearson like the one displayed below.

Pearson Profile Information Request - Action Required

Powered by coupa

Hello Supplier,

Pearson wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast and it helps you better transact and communicate electronically. Find out more using the links below.

You can respond and send your information to your customer without joining, but joining allows you to more easily update your company info if it ever changes, as well as do things with Pearson (and your other buying organisations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts and much more.

Use the buttons to either respond or decline, or forward this request to another person at your company.

Welcome!

Pearson

Join and Respond   **Respond Without Joining**

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

Your contact at Pearson will inform you when to expect the above email to be sent to you.

In preparation to receive this very important email, add the following email address as a safe sender in your email application: do_not_reply@supplier.coupahost.com

Also, be sure to monitor the **Spam** folder in your email application so that you do not miss the email. Without the email you can't onboard, and without onboarding you cannot do business with Pearson.

1   Click the **Respond Without Joining** button to respond to the Request for Information from Pearson.

(i)   The **Pearson Supplier Onboarding** form is displayed.

(i)   Please note that once you have launched the form, you will need to complete it, as there is no **Save** function. Please ensure you have enough time to complete the form to avoid losing your work.

(i)   If you want to get the latest materials that show how to fill in this form, click on the link for instructions and guidance.

(i)   If you have any questions or issues whilst filling in the **Pearson Supplier Onboarding** form, please send an email to coupasupplier@pearson.com.

2   Ensure the **Company Name & Classification** section of the form is visible on your screen.

3   If your company has a parent company, please enter the name of the parent company in the **Parent Company Name** field.

Company Name & Classification:

* What is the name of the legal entity from which you will be invoicing Pearson?

VideoScript Limited

Parent Company Name

Please enter Parent Company details if the company supplying goods/services to Pearson is part of a Group.

* Category of goods or services your organisation will be providing:

VIDEO SCRIPT WRITING

ⓘ The **Category** of goods or services your organisation will be providing has already been selected by your Pearson contact. There should be no need to change this.

4   Ensure the **Incorporated Companies** section of the form is visible on your screen.

5   Answer the question if your company is incorporated with either "Yes" or "No".

6   Enter the number of employees that work in your company in the **Number of Employees** field, for example: "8".

Incorporated Companies:

* Is your Company Incorporated?   * Number of Employees? (If a sole proprietor or independent contractor please enter '1')

◉ Yes
○ No   8

ⓘ If you are a sole proprietor or independent contractor, please enter "1" in the **Number of Employees** field.

7   In the **Primary Operating Territory** section, select in which country your organisation's goods or services will mostly be delivered.

Primary Operating Territory:

* In which country will your organisation's goods or services mostly be delivered?

ⓘ Note that the list is sorted alphabetically but the **United States** are listed at the top of the list, to make it easier to select.

ⓘ Tip: Click in the **Country** field and enter the first letter of the country you want to select, for example "C" (if you want to select Canada). This will show the first countries in the list of which the name starts with "C". Select the appropriate country from the list.

8   In the **Primary Operating Currency** section, state your organisation's preferred currency for invoicing and payment, for example "GBP".

Tip: Click in the **Currency** field and enter the first letter of the currency you want to select, for example "G". This will show the first currencies in the list of which the abbreviation starts with "G". Select the appropriate currency from the list.

ⓘ Frequently used currencies are:

CAN = Canadian Dollar

EUR = European Euro

GBP = Great British Pound

USD = United States Dollar

9   In the **Organisation Classification** section, select your organisation's type, for example "Private company limited by shares".

10   In the **Organization Type** field, select the appropriate value, for example "Corporation".

11   Scroll down to the section that contains your contact information.

YOUR CONTACT INFORMATION

It is MANDATORY to provide First Name, Last Name, Email and Telephone Number. Failure to do so will result in the form being returned to you for the correct information.

* Primary Contact

First Name: Joe

Last Name: Bloggs

Email: pearson.uat1+271119@gmail

Mobile Phone: US/Canada — 650-555-1212

Work Phone: US/Canada — 650-555-1212

Fax: US/Canada — 650-555-1212

12   Add a **mobile** phone, **work** phone and/or **fax** number, as appropriate.

This information is not mandatory to provide.

Hover your mouse over the blue information icon to see further information regarding the field it is displayed next to.

If you are entering a US/Canada number, there is no need to enter the country code. Use the same number format as in the example displayed in grey below the number field.

If the number you are providing is **not** a US/Canada number, change the country from US/Canada to "Other" first. Then, make sure to enter the following information:

Country code, for example, "44" for United Kingdom

Area/city code, for example, "20" for London

Local number, for example, "7010 2000"

Note that the **Extension** field is optional.

13   Now let us know how you would like your Purchase Orders (POs) to be sent to you.

HOW WOULD YOU LIKE YOUR PURCHASE ORDERS (PO) SENT TO YOU?

* How does your organisation prefer to receive POs? (Pearson's recommendation is: Email)

| E-mail ⌄ |

* How does your organisation prefer to receive PO changes? (Pearson's recommendation is: Email)

| E-mail ⌄ |

* What is your organisation's email address to receive POs?

| pearson.uat1+271119@gmail | ⓘ

ⓘ Pearson recommends the above settings, which means that an **email** is sent to the email address provided in the above field for every PO that is generated.

ⓘ The email address provided here can be different from the email address that was used to register to the Coupa Supplier Portal. The email address will typically be an address from the **Sales** or **Accounts Receivable** department in your company.

14   Move down to the **REMITTANCE CONTACT INFORMATION** section.

REMITTANCE CONTACT INFORMATION

Pearson requires accurate bank details in order to transact with your organisation. Please note this section looks to accept banking for suppliers who might bank in very different countries. As such, please use those banking details you are familiar with providing for your organisation's country of banking. You can ignore many fields in this section if they are not relevant for your organisation, but other suppliers may require them. If you have questions, email coupasupplier@pearson.com for support to creating new details.

It is mandatory to provide your REMIT-TO address (your payment address), please click on the 'ADD' button below. This will open a new window to provide details. Once completed you will come back into this form to continue.

* Remittance Contact Name

| Joe Bloggs |

Hint for Your Payment Contact Name: Enter your contact name for payment questions.

* Remittance Contact Email

| pearson.uat1+271119@gmail.com |

Hint Your Payment Contact Email: Enter your payment contact name email address for payment questions.

* Remittance Contact Phone Number

| 02070102000 |

Hint for Your Payment Contact Phone Number: DO NOT ENTER ANY SPACES OR SPECIAL CHARACTERS.

15   In the **Remit-To Address Lines** section, click **Add** to add a Remit-To 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.

[Add]

Any additional banking information? (only necessary for very few organisations)

Use this field to provide other miscellaneous banking information such as routing information.

ⓘ A new section, **PAYMENT ADDRESS INFORMATION**, is displayed within the Remit-To Address Lines section.

PAYMENT ADDRESS INFORMATION

Please use this initial selection to add your additional required addresses.

Street Address, City, Postal Code and Country are Mandatory.

* Address Name

* Street Address

Street Address 2

* City

* State / Region / County

* Postal Code

* Country

---

16   In the **Address Name** field, enter a name for the address that you are entering, for example "Remit-To address".

17   In the **Street Address** field, enter the street address, for example "100 Example Street".

ⓘ If the full street address does not fit into the **Street Address** field, use the **Street Address 2** field. For example "Unit 5".

18   In the **City** field, enter the city, for example "London".

19   In the **State / Region / County** field, enter the state, field or county in which the city is located, for example "Greater London".

20   In the **Postal Code** field, enter the postal code (or post code), for example "E1 7ND".

21   In the **Country** field, select the country from the dropdown list, for example "United Kingdom".

Tip: Click in the **Country** field and enter the first letter of the country you want to select, for example "C" (if you want to select Canada). This will show the first countries in the list of which the name starts with "C". Select the appropriate country from the list.

PAYMENT ADDRESS INFORMATION

Please use this initial selection to add your additional required addresses.

Street Address, City, Postal Code and Country are Mandatory.

* Address Name	Remit-To Address
* Street Address	100 Example Street
Street Address 2	Unit 5
* City	London
* State / Region / County	Greater London
* Postal Code	E1 7ND
* Country	United Kingdom

22   Scroll down to the **BANK DETAILS** section and enter the bank details below:

Please note that the fields you need to enter can differ for each country. In the below example, the typical details required for a UK bank account are shown.

BANK DETAILS

This section is required. Please note this section looks to accept banking for supplier who might bank in very different countries. As such, please use those banking details you are familiar with providing for your country of banking. You can ignore many fields in this section, but other suppliers may require them. If you have questions, email coupasupplier@pearson.com for support.

* Bank Name   TSB

MANDATORY: Bank Name is a required field. The Bank Name and Bank Country will generate the bank address for Pearson.

* Beneficiary Name   John Smith

MANDATORY: Bank Account Name is a required field.

* Bank Account Number   35529968

MANDATORY: Bank Account Number is a required field

Sort Code   775612

DO NOT enter ANY special characters such as spaces or hyphens. E.g. Sort Code for UK banks should be: 600835. MANDATORY: Depending on Bank Country for the account either: Sort Code, Routing Number, or SWIFT Code MUST BE COMPLETED.

23   In the **Bank Name** field, enter the name of the bank, for example "TSB".

24   In the **Beneficiary Name** field, enter the name to which the bank account is registered, for example "John Smith".

25   In the **Bank Account Number** field, enter the bank account, for example "35529968".

26   In the **Sort Code** field, enter the sort code of the bank branch, for example "775612".

For any non-UK Bank Account, **SWIFT Code AND one** of these three fields (**Routing Number, IBAN,** or **Sort Code**) **MUST BE POPULATED** for the bank to be found. The relevant fields depend on the **Bank Country** for the account.

Sort Code: This is a six-digit number, usually formatted as three pairs of numbers, for example 12-34-56. It identifies both the bank and the branch where the account is held.
Bank Routing Number: a nine-digit code that's based on the US Bank location where your account was opened.
SWIFT Code: an international bank code that identifies particular banks worldwide. It's also known as a Bank Identifier Code (BIC).
IBAN Number: a number consisting of an alphabetical country code, followed by two digits, and then up to thirty-five characters for the bank account number. **It should be entered without spaces.**

BSB Number: This is a six-digit number that identifies banks and branches across Australia

27   Scroll down if required.

Bank Routing Number	
	Please provide this information where known / relevant
SWIFT Code (BIC)	
	Please provide this information where known / relevant
IBAN Number	
BSB Number	
* Bank City	London
	Please provide bank city
Bank State or Region	
* Bank Postal Code	CA28 7DT
	Please provide bank postal code
* Bank Country	United Kingdom
	Please provide bank country
Any additional banking information? (only necessary for very few organisations)	
	Use this field to provide other miscellaneous banking information such as routing information

28   In the **Bank City** field, enter the city in which your bank branch is located, for example "London".

29   In the **Bank Postal Code** field, enter the postal code (or post code) of the bank branch, for example "CA28 7DT".

30   In the **Bank Country** field, select the country from the dropdown list, for example "United Kingdom".

ℹ   Tip: Click in the **Country** field and enter the first letter of the country you want to select, for example "C" (if you want to select Canada). This will show the first countries in the list of which the name starts with "C". Select the appropriate country from the list.

31   Scroll down to the **INTERMEDIARY BANK DETAILS** section.

ℹ   Most suppliers do not use **intermediary** or secondary banks to support their payments and can ignore this section. If your organisation does use intermediary banks please complete this section.

INTERMEDIARY BANK DETAILS

Most suppliers do not use intermediary banks to support their payments and can ignore this section. If your organisation does use intermediary banks please complete this section.

Intermediary SWIFT Code (BIC)
Please provide this information where known / relevant.

Intermediary IBAN Number
Please provide this information where known / relevant.

Intermediary Bank Name
Please provide the information where known / relevant.

32   Scroll down to the **TAX INFORMATION** section.

TAX INFORMATION

Tax fields below are dependent on where your organisation is tax registered. Most organisations will only need to provide their Primary Tax ID and can ignore other fields. If you are supplying goods/services to other countries please provide relevant tax details.
For the UK please provide your I Tax ID below:

* Are you registered for any National or State Taxes?
Yes
No

33   Answer the question if you are registered for any **National** or **State** taxes with "Yes" or "No".

If you answer "Yes", some additional fields are displayed in green.

Enter the details are required.

Primary Tax ID: This field is relevant for Non-US Goods/services. Enter your corresponding VAT registration if applicable.

TAX INFORMATION

Tax fields below are dependent on where your organisation is tax registered. Most organisations will only need to provide their Primary Tax ID and can ignore other fields. If you are supplying goods/services to other countries please provide relevant tax details.
For the UK please provide your I Tax ID below:

* Are you registered for any National or State Taxes?

◉ Yes
○ No

Primary Tax ID GB123456789

If your organisation is supplying goods/service to Pearson in the US please complete the following section. If not, please leave blank.

Federal Tax ID [   ] ⓘ

Federal Tax Form

Type [˅]
Attachments Add File

State Tax Form

Type [˅]
Attachments Add File

If your organisation is supplying goods/service to Pearson in Canada please complete the following section. If not, please leave blank.

Additional Tax IDs [   ]
eg. PST for Canada

ⓘ If your organisation is supplying goods/service to Pearson in the **US**, enter a Federal Tax ID in the **Federal Tax ID** field. If not, leave this field blank.

ⓘ If your company is registered in the **US** and you want to attach a **W8** or **W9** form, use the **Federal Tax Form** section. Select the appropriate type and attach the relevant file.

ⓘ If your company is registered in the **US** and you want to attach a **587, 588 or 590** form, use the **State Tax Form** section. Select the appropriate type and attach the relevant file.

ⓘ If your company is supplying goods/services to Pearson in **Canada**, enter the relevant additional tax ID's in the **Additional Tax IDs** field. For example, PST.

34   Scroll down to the **MANDATORY RISK ASSESSMENT INFORMATION** section on the form.

35   Answer the question if you have a personal or business relationship which could call into question the impartiality as to: 1) how you came or continue to be a supplier, OR 2) work you will be required to do on behalf of Pearson.

Conflict of Interest

* Q1. Do you have a personal or business relationship which could call into question the impartiality as to: 1) how you came or continue to be a supplier, OR 2) work you will be required to do on behalf of Pearson?

◯ Yes / Oui
◉ No / Non

Q1a. If Yes to Q1, please provide details for further review: For More information, follow the link below. Link:

🔗 https://neo.pearson.com/docs/DOC-7226...

36   If you selected "Yes", please provide details in the text field directly below the question.

ⓘ   Use the link on the right-hand side of the page for more information on Pearson's conflicts of interest policy.

37   Answer the question if any constituent of your organisation, your affiliates, or your subcontractors, is a target of any trade sanctions or investigation in any jurisdiction.

Answer with "Yes / Oui" or "No / Non".

Trade Sanctions

* Q2. Trade Sanctions: Is any constituent of your organisation, your affiliates, or your subcontractors, a target of any trade sanctions or investigation in any jurisdiction?

◯ Yes / Oui
◉ No / Non

If you have answered yes to the above question, please enter details here for further review

38   If you selected "Yes", please provide details in the text field directly below the question.

39   Answer the question if any constituent of your organisation, your affiliates, or your subcontractors: (i) operates; (ii) provides any services to Pearson; or (iii) sells or distributes any Pearson products in any of the countries listed directly below the question.

Answer with "Yes / Oui" or "No / Non".

Sanctioned Countries

* Q3. Sanctioned Countries: Does any constituent of your organisation, your affiliates, or your subcontractors: (i) operate; (ii) provide any services to Pearson; or (iii) sell or distribute any Pearson products in any of the following countries?

◯ Yes / Oui
◉ No / Non

HIGH RISK: Iran, North Korea, Syria, Sudan, Belarus, Cuba, Crimea and Sevastopol regions;
MEDIUM RISK: Afghanistan, Balkans (Bosnia, Montenegro, Serbia), Burundi, Central African Republic, Democratic Republic of Congo, Egypt, Eritrea, Federal Republic of Yugoslavia and Serbia, Iraq, Ivory Coast, Lebanon, Libya, Myanmar, Republic of Guinea, Republic of Guinea-Bissau, Russia, Somalia, Tunisia, Ukraine, Venezuela, Yemen, Zimbabwe, Zimbabwe

40   Answer the question if you supply Pearson with any of the products or services listed.

Sustainability

Do you supply Pearson with any of the following products or services: -

- Print services
- HR services
- Facilities management
- Cleaning
- Catering
- Security
- Construction
- Waste disposal
- Data centres
- Software development
- Transport
- Fleet services
- Travel

* Q4 - Select Yes or No

○ Yes / Oui
⦿ No / Non

41   If you selected "Yes", please provide details in the text field directly below the question.

42   Move to the **Supplier Personnel Travel** section and tick the checkbox to confirm your understanding and adherence to the above.

Supplier Personnel Travel:

The Supplier acknowledges and agrees it is solely responsible for the safety and well-being of personnel, engaged directly or indirectly by the Supplier, when travelling in relation to any services provided to Pearson. Without prejudice to the previous, in the instance the supplier arranges any travel for the Supplier's personnel independently, the Supplier shall conform to good industry practice in such regard.

Should the supplier request Pearson arranges travel on-behalf of the Supplier personnel, the Supplier should contact Pearson well in advance of the required travel date for this to be arranged through Pearson's travel management partners.

* Please confirm your understanding and adherence to the above:
☑

43   Move to the **TAX OBLIGATIONS** section and tick the checkbox to confirm your obligations to the above question.
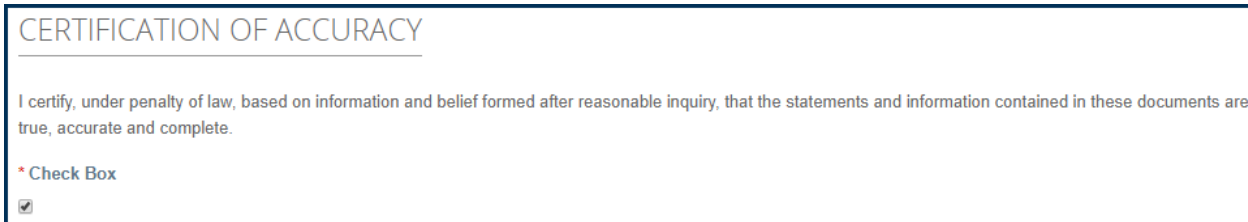
TAX OBLIGATIONS

Where there is a provision of labour to Pearson you must declare your organisation will meet: - any and all Employment Tax regulations and obligations for the tax jurisdiction in which that labour is being provided (for example: PAYE for UK; Taxable Income and FICA for USA) - and remit any taxes (inclusive of national insurance for UK or social security for USA as required) - and any levies to the government, inclusive of State or Federal, tax authorities when due.

If this is not applicable and you will not be providing persons for direct delivery of labour for Pearson, please check the box below to signal your understanding of your employment tax obligations should this become relevant at any point.

* Check this box to confirm your obligations to the above question.
☑

44   Move to the **CERTIFICATION OF ACCURACY** section and tick the checkbox to certify, under penalty of law, based on information and belief formed after reasonable inquiry, that the statements and information contained in these documents are true, accurate and complete.

CERTIFICATION OF ACCURACY

I certify, under penalty of law, based on information and belief formed after reasonable inquiry, that the statements and information contained in these documents are true, accurate and complete.

* Check Box
☑

You have the following options available if you do not wish to submit the form for approval at this stage.
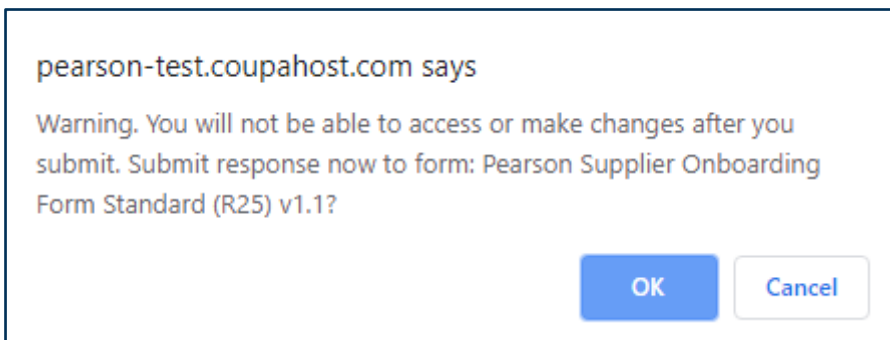
Click **Decline** if you do not wish to proceed to onboard as a supplier with Pearson.

Click the **Submit** button to submit the form to Pearson for review.

45   Click the **Submit** button to submit the form to Pearson for review.

PEARSON ADMIN SECTION. PLEASE LEAVE ALL FIELDS IN THIS SECTION BLANK AND MOVE TO FORM REVIEW AND SUBMISSION

ADMIN, LEAVE BLANK
☐
LEAVE BLANK

Decline   **Submit**

46   A message is displayed. Click **OK** to continue.

pearson-test.coupahost.com says

Warning. You will not be able to access or make changes after you submit. Submit response now to form: Pearson Supplier Onboarding Form Standard (R25) v1.1?

OK   Cancel

If any mandatory information is missing, a message is displayed at the top of the page. Also, the fields that require your attention will be highlighted in red for you.

Scroll up and check any red text and correct / add as appropriate. Click **Submit** again when you have made your corrections.

47   Once the form has been fully approved by Pearson, you will receive an email confirmation.

48   Your supplier details will be available to users in Pearson within **48 hours** after receiving the email confirmation. In other words, your contact in Pearson can start to raise Purchase Orders for you within 48 hours after you received the above email confirmation. Your Pearson contact receives the same email confirmation to inform them as well.

Remember, if you have any issues or questions about the **Coupa Supplier Portal** or the onboarding process, please contact the **Supplier Helpdesk** at coupasupplier@pearson.com.

This concludes this job aid.

Version log			
Version	**Detail**	**Sign off**	**Upload date**
1.0	Document created for Alexander Orchard	Designated Sign Off	19/12/2019

Development log			
Version	**Stage**	**Name**	**Date**
0.1	Work in Progress	Deesha Nathubhai	12/12/2019
0.2	Peer Review	Mark Zeedzen	17/12/2019
0.3	Business Review	John Taylor	19/12/2019
0.4	Quality Review	Deesha Nathubhai	19/12/2019
1.0	Signed Off	Alexander Orchard	19/12/2019