

Entering Details of your Organisation into Coupa

For Suppliers providing a one off service to the John Lewis Partnership and will submit an invoice for payment

Purpose:

This guide explains how one time Suppliers should enter their details into **Coupa**, which is the system the John Lewis Partnership (JLP) uses to manage processing and payment of invoices. To facilitate payment of your invoice, you will **receive an email** called 'Profile Information Request' which invites you to **register** on Coupa, where you can enter all the details JLP needs to make its payment to you.

Important: Please use this guide to help you work carefully through completing the form in Coupa. Please note also that some questions appear more than once which can seem confusing. Please also ensure that every question marked * is completed as these questions are mandatory and if any are left blank, you won't be able to send the form back to us.

The John Lewis Partnership will only pay one off invoices in **GBP** and to a **UK based bank account**

Note: We recommend that you use the **Google Chrome** web browser to perform the steps described below

Actions:

1. On receipt of the email click **Join and Respond**
2. Create a **Password** for yourself and **re-enter** this to **confirm**
3. Select your **Country/Region** - eg United Kingdom
4. Enter your **Tax Registration ID** - eg your VAT number

If you are not tax registered, tick the box 'I do not have a Tax ID' and a Reason - eg "Not registered for Tax"

5. **Tick** to accept the **Privacy Policy** and **Terms of Use**
6. Click **Create an Account**

Next you will be asked to verify your email account

1. Return to you email and make a note of the six digit code email to you from Coupa
2. Enter the code into the boxes as shown below:

Email Verification

We sent a one time verification code

7

1

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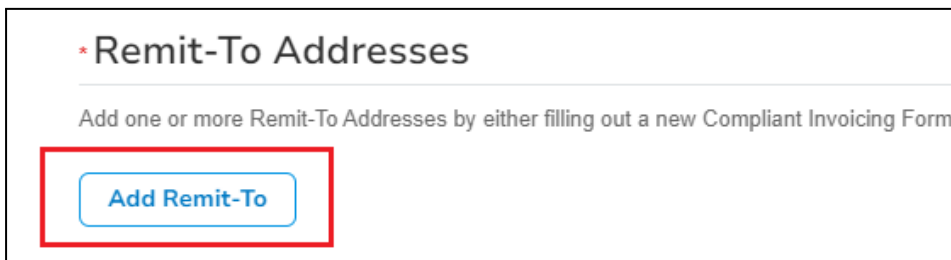
8

2

Didn't receive the Verification Code? [Request a New Code](#)

3. Click **Next**
4. Enter a **Work Phone** number - in case we need to contact you
5. Enter details of your **Business Website** or click 'I do not have a website'
6. Select your **Country/Region** - eg United Kingdom
7. Click **Next**

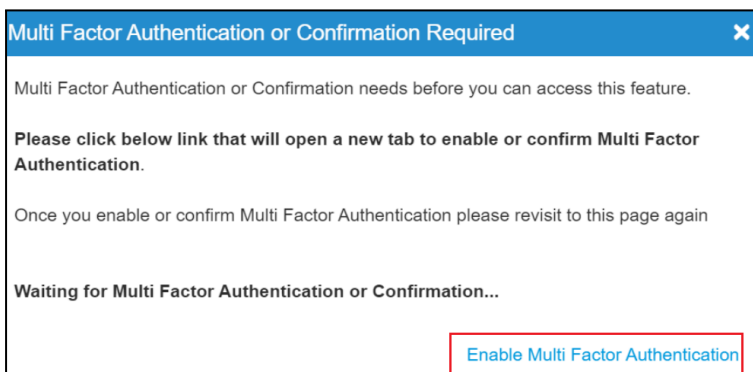
8. Start typing your address in **Address Line 1** - select the correct option from the search results
9. Click **Next**
10. A message asking for more some additional information appears - click **Take Me There**
11. Enter your Company Registration Number - or enter 'Not Registered' if you are not a registered company
12. Next, click the **Add Remit-To** button



Next, you may be asked to set up **Multi Factor Authentication**.

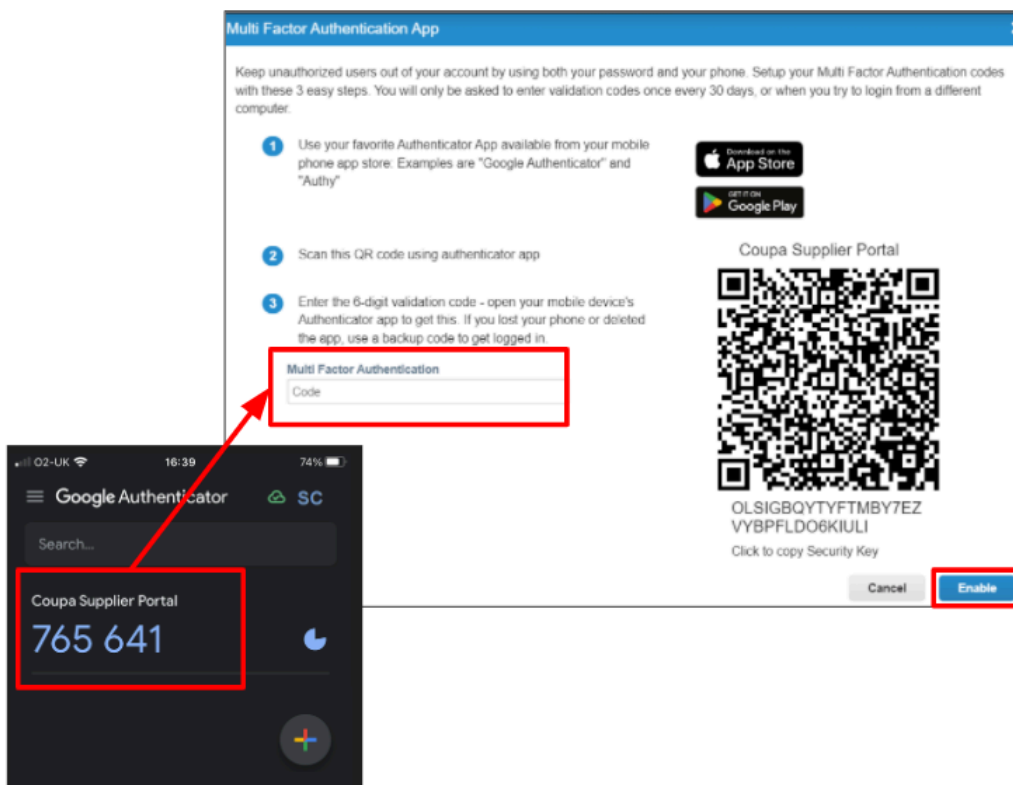
To do this, follow these bullet points and once complete, continue to Step 13

- Click on **Enable Multi Factor Authentication**



- Follow the on-screen instructions summarised here:

- Using a mobile device, download an **Authenticator App** from your Google or Apple App Store
- Open the App and **scan the QR Code** on screen
- Enter the **Six Digit Code** from the mobile App into the Multi Factor Authentication box on screen (as shown below)
- Click **Enable** to complete



Once this is done:

13. Under 'How would you like to be paid?', select **Bank Transfers** and click the **+ Add Payment Method** button:

How would you like to be paid?

All Methods
Bank Transfers
Checks
Credit Cards

+ Add Payment Method

John Lewis Partnership supports Bank Transfers Payments.

Note: The John Lewis Partnership will **only** pay using **Bank Transfers** so please **do not** select any other option or your requested will be cancelled and payment of your invoice will be delayed

14. Enter the **Legal Entity Name** for your organisation
15. Select again your **Country/Region**
16. Click **Continue**
17. Enter your **Type of Company** - eg Consultancy, Construction
18. Click **Save & Continue**

Next, we need to ask you a few more questions about your organisation:

19. Leave the 'All' and 'John Lewis Partnership' boxes **ticked**
20. Enter again your **Address Line 1**
21. Enter the **City** (or Town)
22. Enter you **Postal Code**
23. Leave the 'Remit to' and 'Ship to' boxes **ticked**
24. Enter you **VAT ID** or click 'I don't have a VAT/GST Number'
25. Enter your **Local Tax ID** (eg VAT number) or enter "Not Registered"
26. Leave the 'Invoice from Code' field blank
27. Click **Save & Continue**

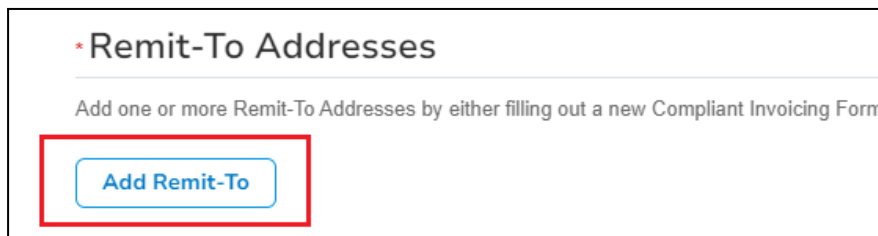
Next, we need to collect your bank Details

28. Enter your **Bank Name** - eg HSBC, Barclays
29. Enter and Confirm your bank **Account Number**
30. Enter your **Sort Code**

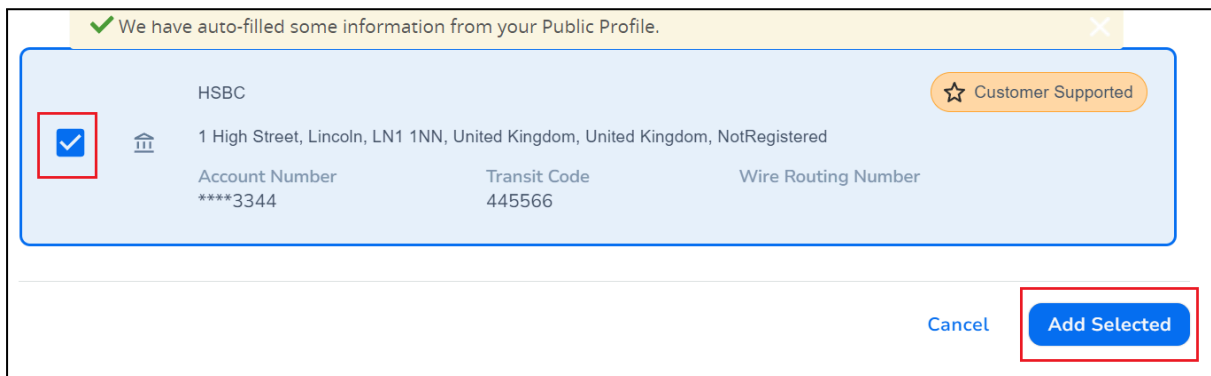
31. Enter your bank **SWIFT/BIC Code** - or tick the box 'My bank does not have a BIC code'
32. Click **Save & Continue**
33. For 'Where do you want to receive payment' click **Next**
34. For 'Where do you ship the goods from', click **Done**
35. On the Setup Complete screen click **Add Now**

You will now be taken to a final form where there are a few more questions to answer:

36. If blank, enter your **Company Registration Number** - or enter 'Not Registered' if you are not a registered company
37. Click the **Add Remit-To** button (again)



The address and bank details you entered previously will appear. **Tick** the box on the left and click **Add Selected**:



Under the Create Remit-to section:

38. Answer **Yes** or **No** to state if you are registered for VAT/GST
 - 38.1. If Yes, enter your **VAT/GST Registration Number**
 - 38.2. and select your **VAT Country**
39. Answer **Yes** or **No** to state whether your company is part of a group for VAT/GST registration purposes
 - 39.1. If Yes, click **Choose File** and upload a copy of your **VAT Registration Certificate**

Next, we need to complete any missing bank details:

40. Enter the **Branch Name**
41. Enter your **Bank Account Name**
42. Under "Bank Supporting Document", please click on **Add File** and then **Browse** to upload a PDF or Photo of your bank statement header, bank cheque or bank paying in slip

Note: JLP does **not** need to see any of your transactions, but **we do** need to see a formal bank document showing your **Account Name**, **Account Number** and **Account Sort Code**. JLP will use this information to verify that the payment it makes reaches the correct account safely.

43. Next, scroll down the remainder of the form and enter details into any boxes marked * which are blank - eg Address Line 2
44. Enter your **Remittance Email Address** - which is where a notification will be sent once payment has been made
45. Leave the Company Address section **blank** but change the County/Region if this is incorrect (often this defaults to United States)

Finally, scroll down and:

46. **Tick** the box to **accept** the statement starting “Supplier is solely responsible for ensuring.....”


47. Click **Submit for Approval**

Note: You may see a message asking you to “Please fix the errors below”:

Please fix the errors below

Where this happens, it means one or more of the mandatory fields marked * is missing important information:

* Branch Name


 • can't be blank

Please scroll back through the form to enter the missing details. Once done, click **Submit for Approval** again

49. You will then be asked if you want to “Save this Information to Your Profile”. JLP recommends that you click **Yes, Save to Profile**

50. You should see a message confirming that “Your information has been submitted”.

What happens next?

- On receipt of your submission, the John Lewis Partnership will check and approve the details and raise a payment to you in due

course. If we need to contact you, we will do this using the details you have supplied to us in this form

- Please supply the John Lewis or Waitrose Partner who has asked you to complete work for us, with an electronic version of your legal invoice fully detailing the work you carried out. This will be used later in the process to raise our payment to you.