Supplier's Guide for Registering their Details in Coupa

For Suppliers of Financial Services only

Purpose:

This guide explains how to register your details for a supplier account on the **Coupa Supplier Portal**. Note: mandatory fields in Coupa are marked *

Frequency:

Once - when the John Lewis Partnership invites you to create an account to register your company or organisation's details in Coupa

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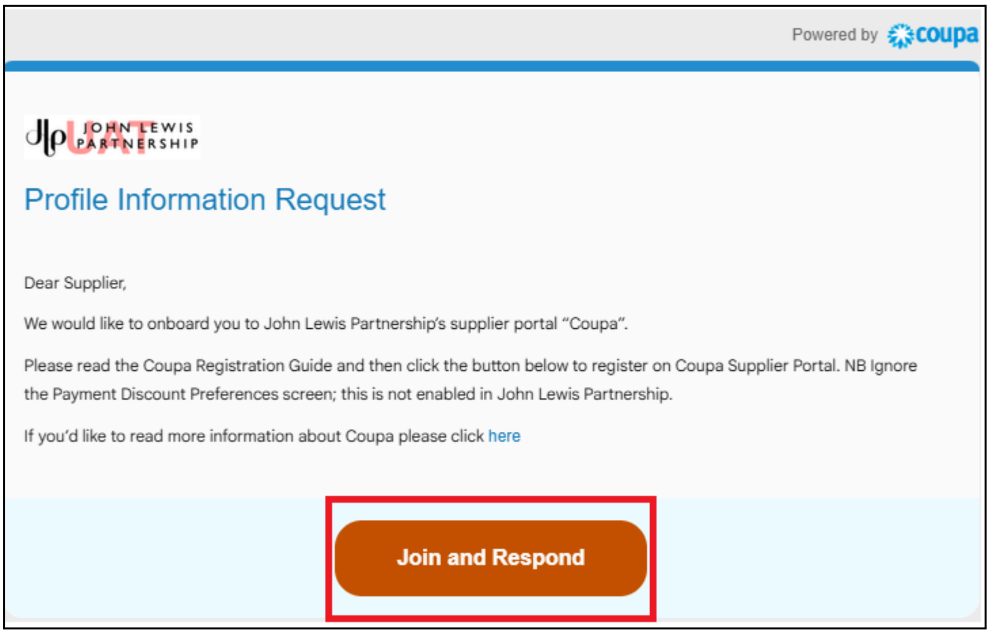
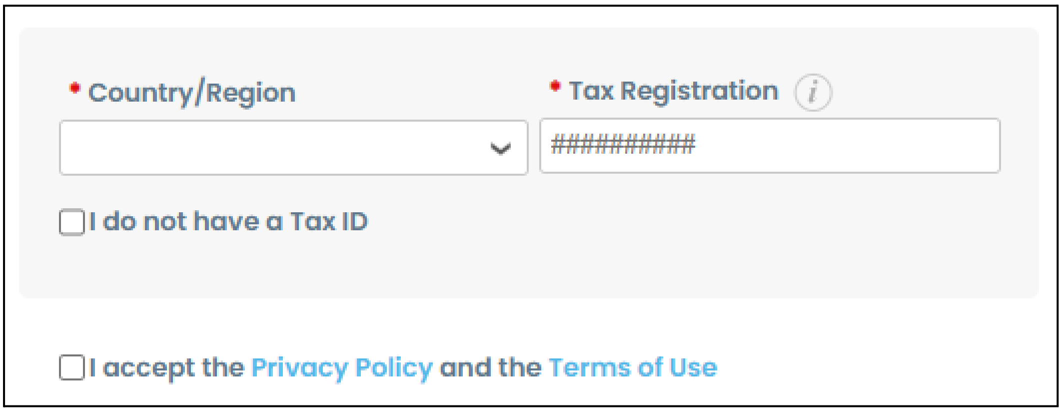
Actions:

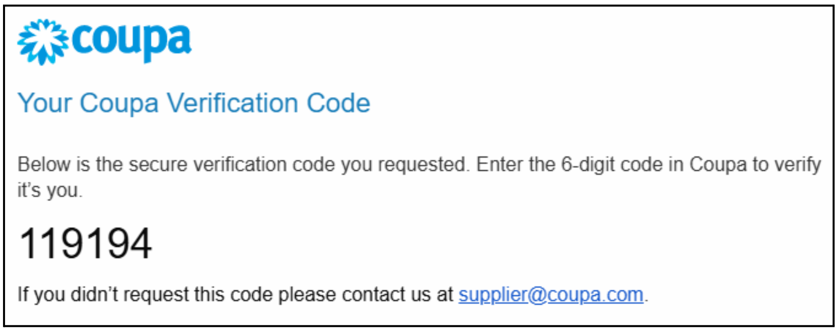
1. On receipt of a 'Profile Information Request' email, click on **Join and Respond**



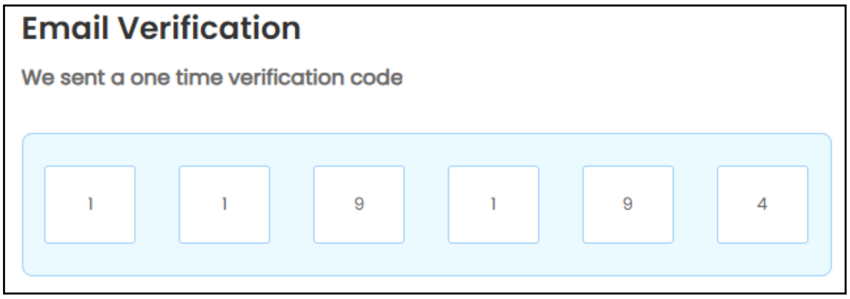
2. **Create** and **Confirm** a **Password** for your new account
3. Select the **Country** you are based in and where applicable enter your **VAT** or **Tax ID**
4. If you do **not** have a Tax ID **tick** the ‘I do not have a Tax ID’ box and type a reason
5. **Tick** the box to accept the Privacy Policy and Terms of Use once read



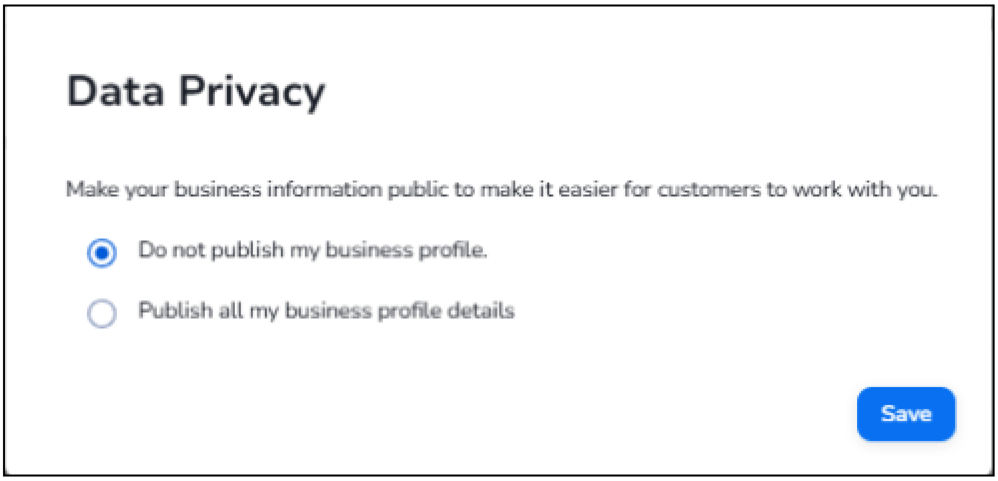
6. Click **Create an account**
7. If you responded to the invite within 24 hours, proceed to Step 10. If you respond to the invite after 24 hours, you will receive an email containing a **six digit verification code** similar to the one below:



8. Enter the received code into Coupa:

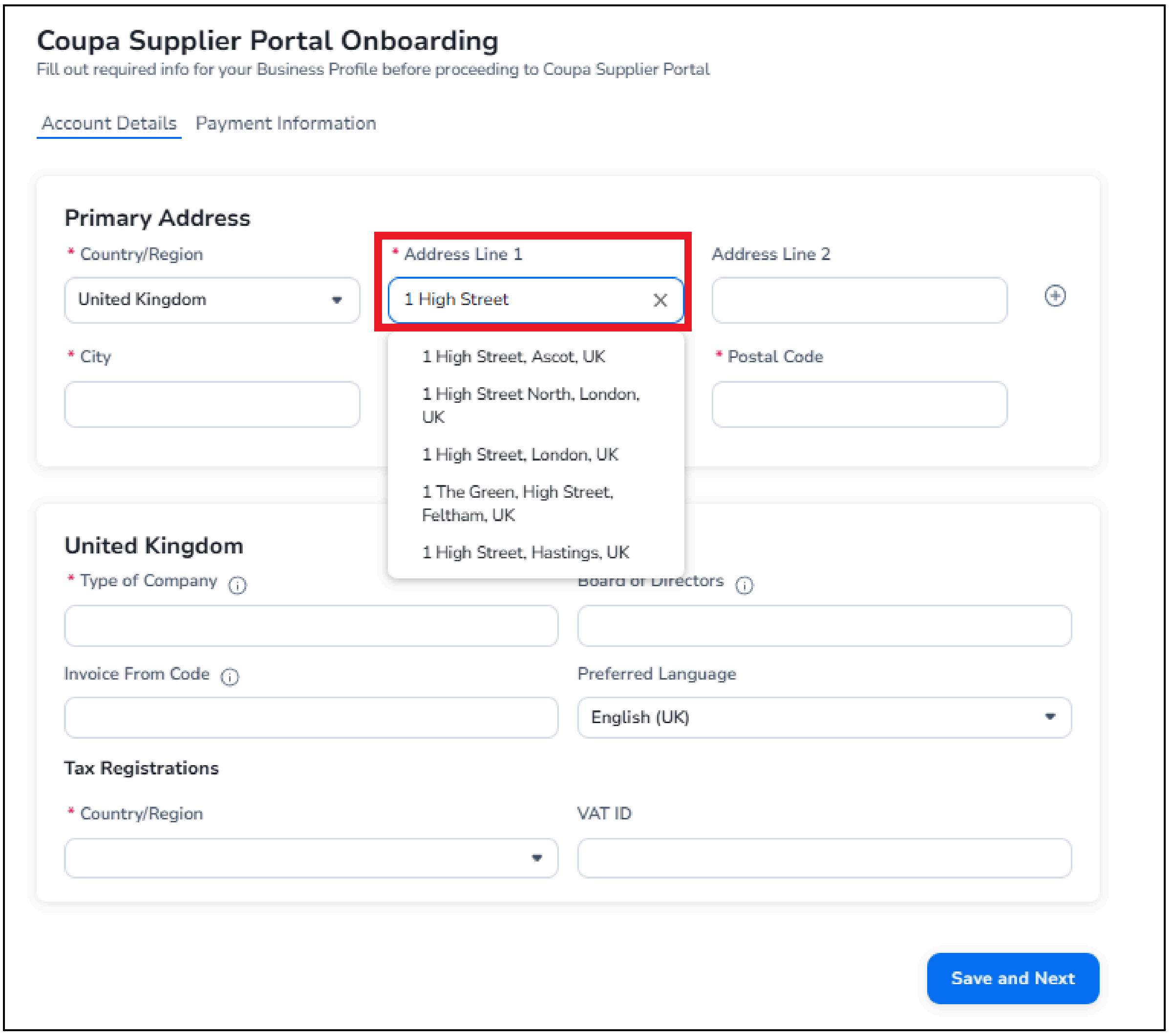


9. Click **Next**
10. Answer the question about publishing your **business profile** and click **Save**



Note: This decision will not impact your registration with JLP

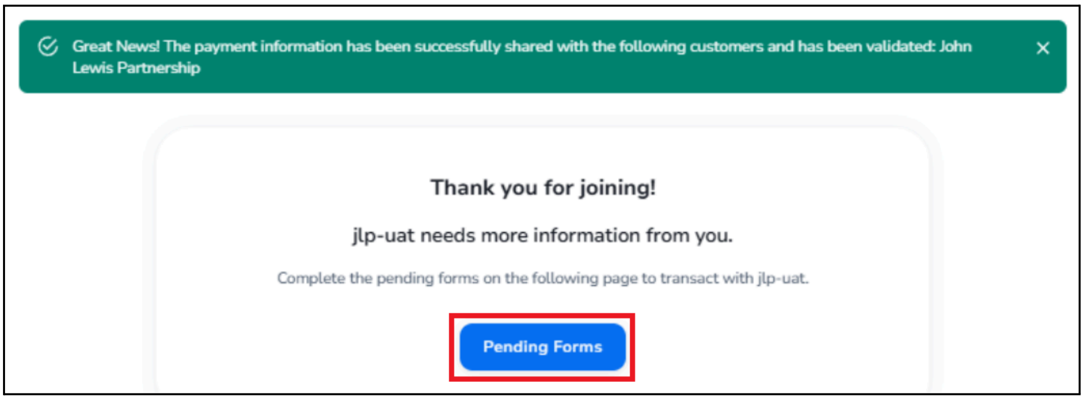
11. Complete **Your Contact Info** details as requested
12. Click **Next**
13. Begin typing the **first line of your address** in the ‘Address Line 1’ field and select the correct option from the search results, the remaining address fields should populate:



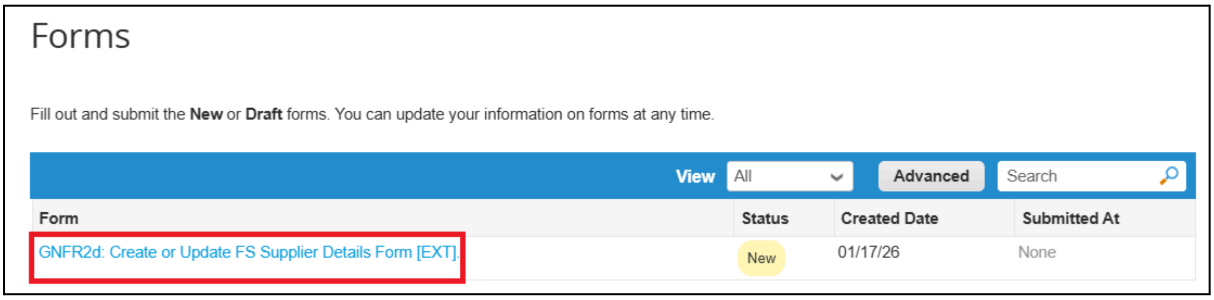
14. Type in your **Type of Company**, confirm your **Country/Region** and **VAT ID** (if applicable) then click **Save and Next**
15. You will then be taken to **Payment Information,** tick the box that says **'Do not accept Virtual Card payments from this customer'** (as this is not this is not enabled in John Lewis Partnership). Click **Save and Next**
16. The next payment method is **Bank Transfer,** tick the box that says **'Do not accept Bank Transfer payments from John Lewis Partnership'** (because we have identified you are a Financial

Services supplier who is not expecting payments from us). Click **Save and Next**

17. Next you will see a prompt confirming you have joined:



18. The prompt will automatically close and will take you to the **Form Responses** page where there will be a form called **GNFR2d: Create or Update FS Supplier Details Form,** click on this:



19. Check the **Company Name** is accurate - correct if wrong

*Note: For **UK based suppliers,** this should match what is on Companies House / HMRC unless you are group VAT registered.*

(Tip - If your company is registered as 'Limited', make sure you enter this in full - please don't shorten to 'Ltd' as this will fail matching)

20. Enter your **Company Registration Number:**

20.1. If you are a **UK registered company** this is provided by Companies House

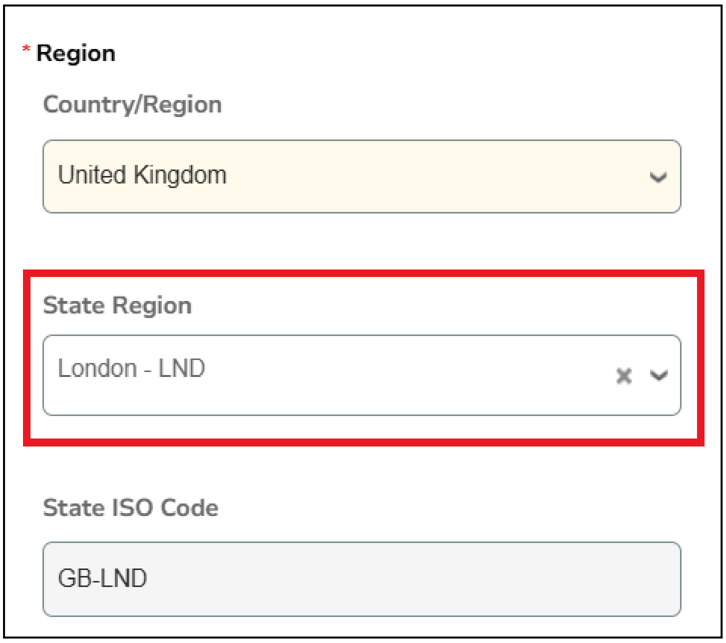
20.2. If you are registered **outside of the UK**, please enter the registration number from the country where you are based

20.3. If you are **not** a registered company**,** please enter **'Not Registered'**

21. Type in the **Country of Registration** where your organisation is registered

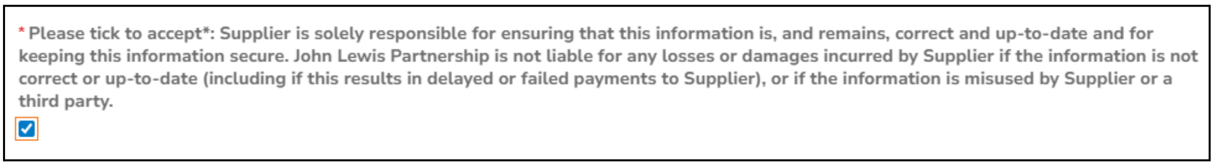
22. In the **Contact** section, add a **Work Phone** number (see recommended format below and repeat the format for **Mobile Phone** and **Fax** if applicable)

23. In the **Company Address** section, the address is pulled from when you first registered, check that it is accurate - correct if wrong and ensure you add your **State Region**



*Note: The **State ISO Code** will automatically populate once you select your State Region*

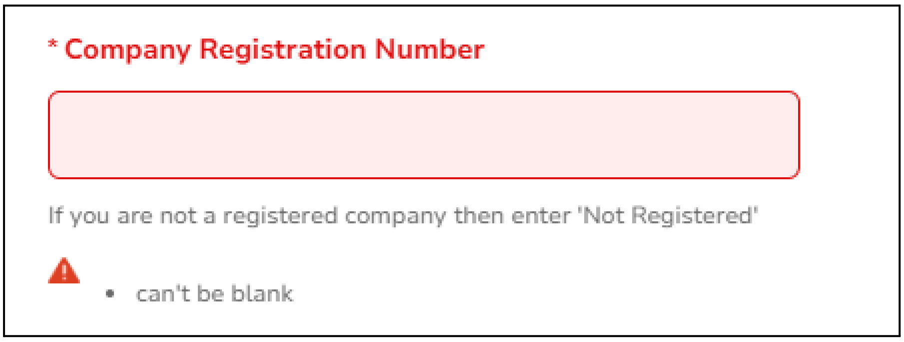
24. Select an option to indicate your **Supplier Indicated Diversity Status**
25. **Tick** the box to accept the statement shown below:



26. Click **Submit for Approval**

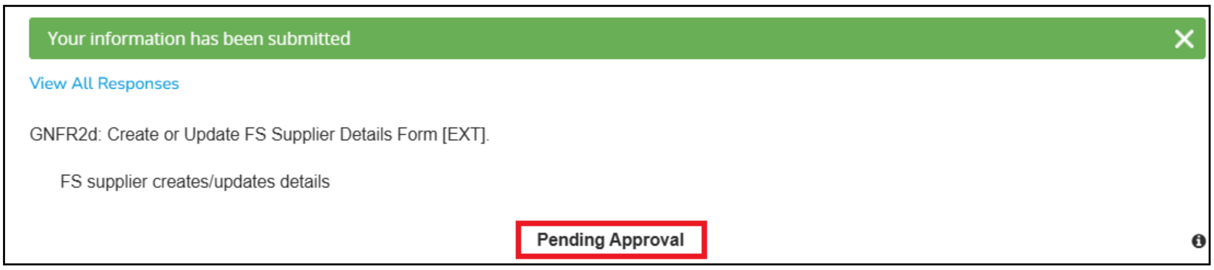
If all fields are completed correctly you will receive a confirmation message (see screenshot in step 28). If, however, one or more of the mandatory fields are missing information you will receive this error message:

27. Where this happens, scroll back through the form to look for the missing information which will be highlighted to you like this:



28. Complete the missing information for each error and once complete click **Submit for Approval** again

On successful submission, you will receive this message and the status of which will be **Pending Approval**



What Happens Next:

- The John Lewis Partnership will receive and review your submission and may need to contact you directly to discuss the details you have entered

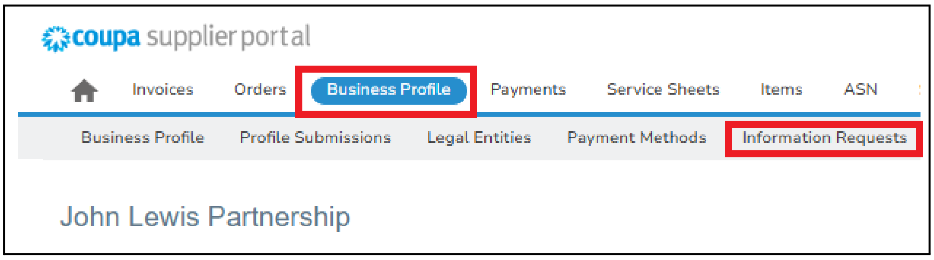
- Once your details are validated by JLP this status will change to **Applied**

Note: If you have entered any of the details incorrectly, you can amend them by scrolling to the bottom of the form and pressing **Withdraw.** You can then amend the details and re-submit for approval, as above.

Additional Information:

You may find that you are ‘timed out’ from Coupa after a period of inactivity. Where this happens, and you still need to complete details in the form:

1. Log back into Coupa (link below) using the user name (email address) and password you created in step 2
2. Once logged in, you can return to the form by navigating to **Business Profile > Information Requests**



3. You will then be able to complete and submit the form

Useful Links:

Link to: Coupa Supplier Portal

Link to: Technical Help Using Coupa