Registering for an Account on Coupa

For: John Lewis GFR Suppliers new to the John Lewis Partnership

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Purpose:

This guide explains how to register 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

Important: Please note that **Multi Factor Authentication** is enabled within Coupa and can not be disabled. Please ensure you maintain the Multi Factor Authentication codes, passkeys or apps for any future Coupa actions with the John Lewis Partnership or other organisations you may transact with.

Important: Please ensure you are using a UK/ US keyboard when completing your information as special characters will not be accepted and could delay your onboarding. If you are selecting your address from the Coupa dropdown, please remove the special characters and replace them with UK/ US keyboard characters, e.g 'Ñ' should be replaced with 'N'. You will need to edit and resubmit your information if it is incorrect.

Actions:

1. On receipt of the email click **Join and Respond**

2. If you are a new supplier, create a **Password** for yourself and **re-enter** this to **confirm.** If you are an existing supplier and have already completed Steps 3 to 14 previously, proceed to **Step 15**

3. Select your **Country/Region** - eg United Kingdom

4. Enter your **Tax Registration ID** - eg your VAT number

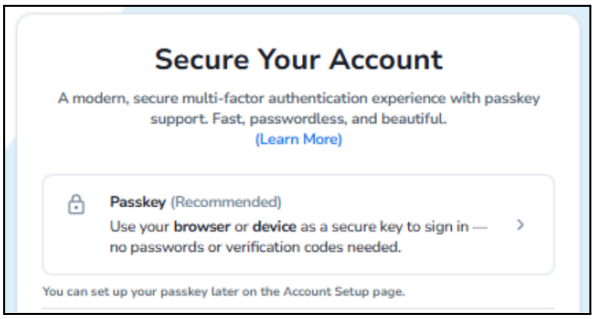
   If you are not tax registered, tick the box 'I do not have a Tax ID' and a Reason - eg "Not registered for Tax"

5. **Tick** to accept the **Privacy Policy** and **Terms of Use**

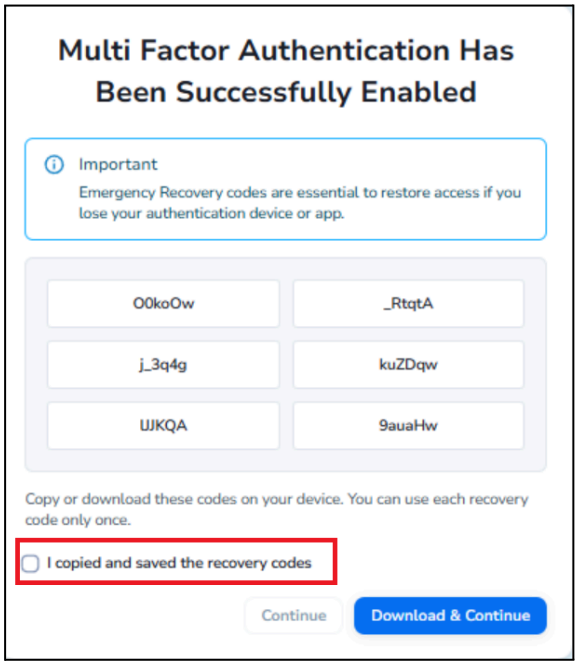
6. Click **Create an Account**

Next you will be asked to secure your Coupa account

7. Secure your account

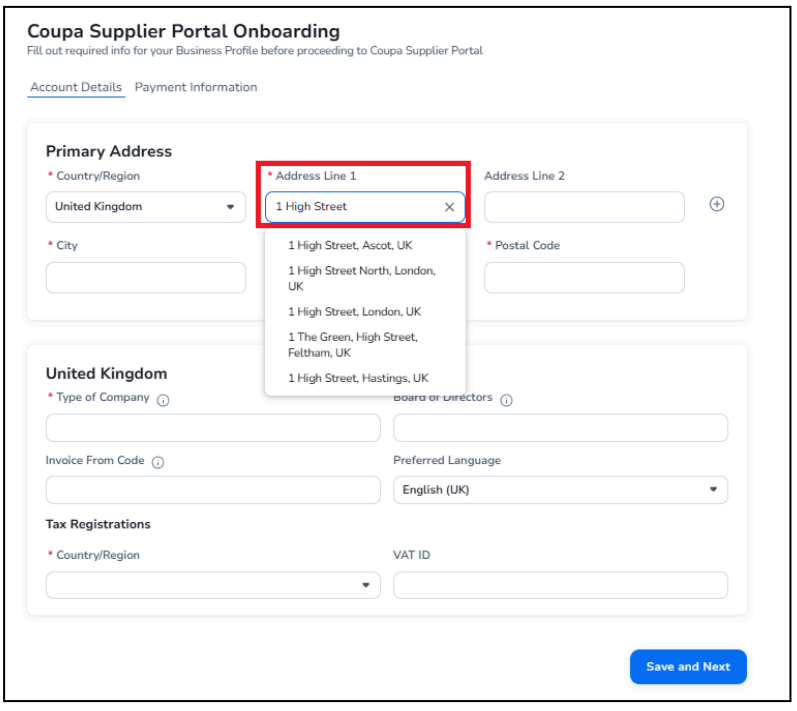


8. Next, you will be prompted to copy, download and save the recovery codes, once done click **Continue** or **Download and Continue**



9. Complete your **Onboarding Information** details as requested

10. 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:



Note: *If special characters appear in your address, please remove them and use a UK/US keyboard character before continuing, e.g. 'Ñ' should be replaced with 'N'. If these special characters are not removed, this could delay your onboarding process*

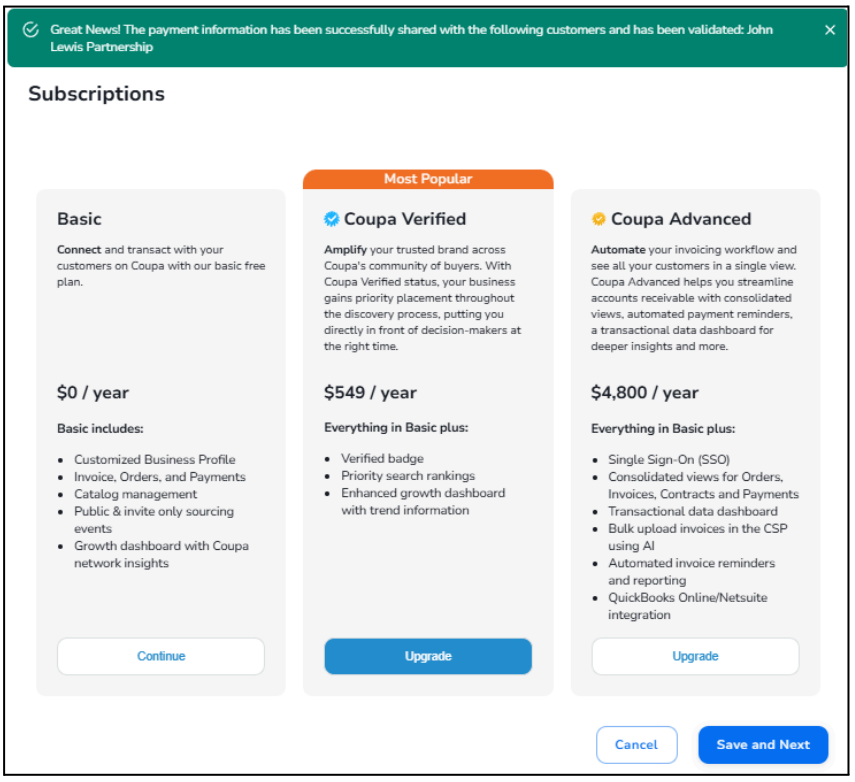
11. Type in your **Type of Company**, confirm your **Country/Region** and **VAT ID** (if applicable) then click **Save and Next**

12. Next, you will then be taken to the **Virtual Card** screen, tick the box that says **'Do not accept Virtual Card payments from John Lewis Partnership'** (as this is not this is not enabled in John Lewis Partnership) and click **Save and Next**

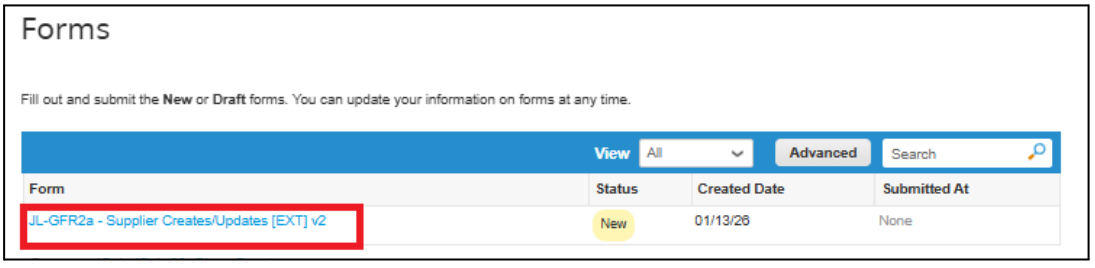
13. The next payment method is **Bank Transfer,** complete the required fields and click **Save and Next**

    Note: *If you use a Factoring Company, the Bank Details must be entered that belong to the Factoring Company. The Beneficiary Legal Name on the Bank Account must match that of the Factoring Company. If you submit the incorrect information, you will need to go and update this in the Payment Methods section*

14. Next, you will be presented with a Coupa Subscriptions page, click **Cancel** to continue



15. You will now be taken to the **Form Responses** page and there will be a form called **JL-GFR2a - Supplier Creates[EXT],** click on this



*Note: If you are not taken directly to the Forms page, please click **Business Profile**, then **Information Requests** and select **JLP** from the **Select Customer** dropdown*

16. 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)

17. Enter your **Company Registration Number**

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

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

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

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

Note: Enter your full country name (e.g., 'United Kingdom' or 'United States'). Do not use abbreviations

19. Enter your **Currency** (e.g. GBP)

20. Answer the question **Yes** or **No** regarding **Self Billing**

    20.1. If you are an SOR, D2C Mirakl Supplier or have a pre-agreed Self-Billing arrangement, select **Yes** for Self Billing. Once Self Billing has been agreed, you will be contacted to confirm this once this form has been submitted and approved

20.2. Select **No** if you work with us under a different business model to the above and you will be asked a question regarding eInvoicing

20.2.1. Selecting 'Coupa Supplier Portal' means you will submit your own invoices against Purchase Orders in Coupa

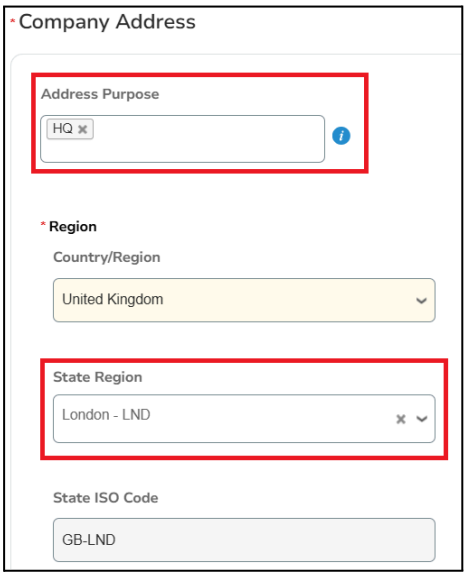
20.2.2. EDI means you will use a Third Party who acts as a go-between to prepare and present your invoices to JLP. You will be contacted after this form is submitted and approved if you have selected EDI

Note: Tungsten is not enabled for GFR Suppliers. EDI is enabled only for UK Wholesale suppliers

21. In the **Contact** section, add a **Work Phone** number (see recommended format below):

22. Add your email address contacts for **Communications, Returns and Sales**

23. In the **Company Address** section, select an **Address Purpose** e.g **HQ** and add your **State Region Code.** The address is pulled from when you first registered, check that it is accurate - correct if wrong:



24. Add your **Company Address** country

25. In the **Ordering Address** section, select an **Address Purpose** e.g **HQ** and add your **State Region Code** and fill out the ordering address

26. Add an **Ordering Address Country, Ordering Address Contact Number** and **Ordering Email Address** and a Company **Internet Address**

    ***Note**: Ordering email address is where all Purchase Orders will be sent to*

27. Click the **Add Remit-To** button:

27. In the Remit-To section, select a **Payment Method** or set one up if you do not have a payment method

*Note: If a payment method needs setting up, please select **Bank Transfers** and complete the relevant information (do **not** select Virtual Cards as this is not accepted by JLP) and click **Save***

Note: Multi Factor Authentication may be required when adding bank details

29. In the **Remit-To Addresses** section you can now answer the **VAT Details** questions regarding **VAT** or **GST**

    29.1. If you responded **No** to being registered for VAT or GST or you are not registered, enter 'Not Registered'

    29.2. If you responded **Yes** to being registered for VAT or GST, enter your VAT number including the 2-digit country code with no spaces e.g. XX123456789

    29.3. If you responded **Yes** to **Group VAT,** attach your Group VAT **Certificate**

30. In the **VAT Country** section, please select the two digit ISO country code associated with your VAT number. If you are not registered, then please select 'Not Registered' from the dropdown

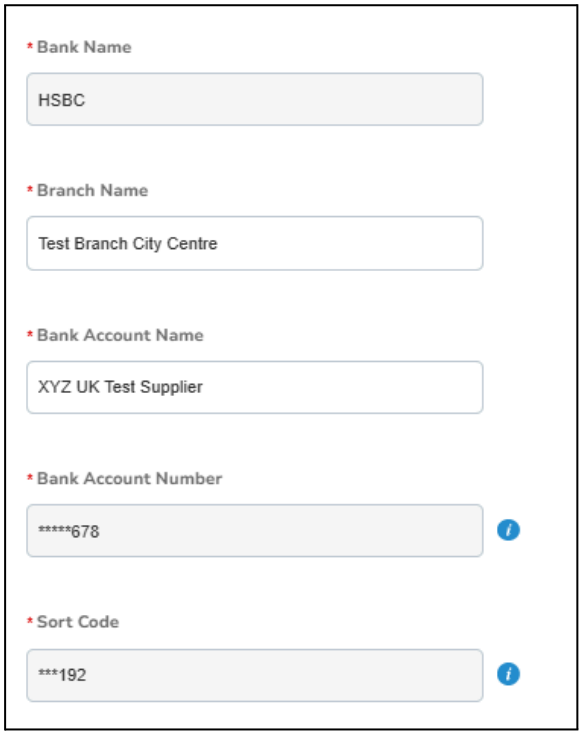
31. In the **Bank Details** section, answer the question on **Factoring**

    ***Note:** If you are using Factoring, please ensure that you set up the bank details for the factoring company*

    31.1. If **Yes** is answered then please use the **Choose File** button to attach a copy of your 'Factor Notice of Assignment'

Note: Please ensure the name on the Factor Notice matches the Factoring name and Bank Account

32. Enter or add more details of your **Bank Account** (example below)



33. Complete any **missing mandatory fields** regarding details of your bank (mandatory fields are marked *)

34. Complete the **Company Address** section and update any details in the **Contact** section if required. If you are updating **Work Phone** number, see the recommended format below

35. If applicable, enter Intermediary Details

Note: An intermediary is any third-party company that helps transfer goods, services, or payments between you and JLP

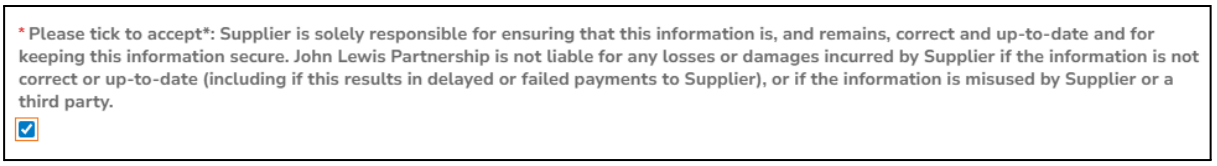
36. Enter a **Remittance Email Address** where you would like your remittance advice sent to

37. Enter a **Debit Note Email Address**

38. Ignore the section that says **Internal Use Only**

39. Click **Submit for Approval**

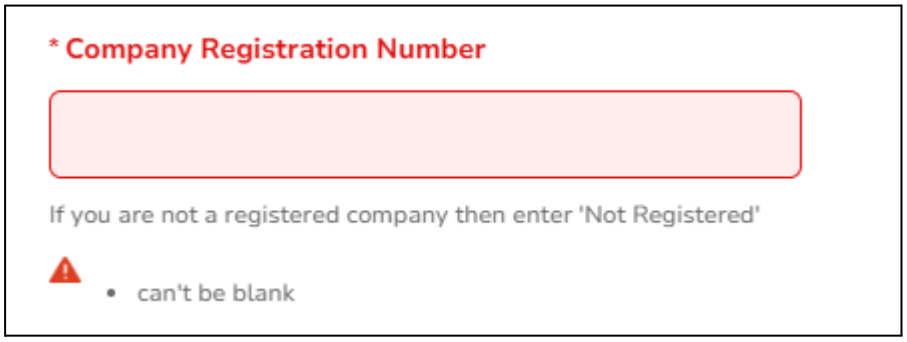
40. **Tick** the box to accept the statement shown below



41. Click **Submit for Approval**

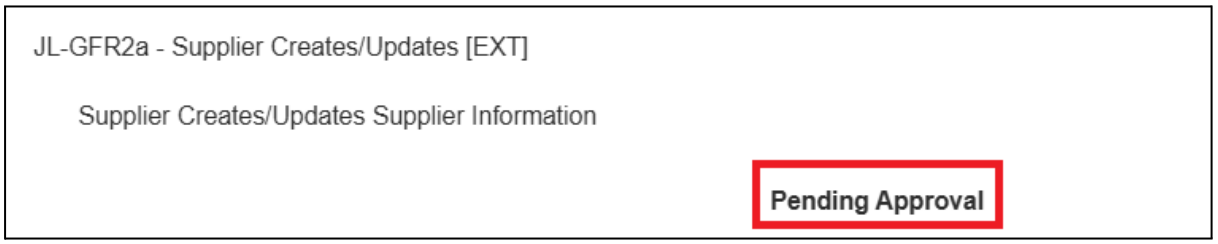
    If all fields are completed correctly you will receive a confirmation message (see screenshot in step 43). If, however, one or more of the mandatory fields are missing information you will receive this error message

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



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

On submission, you will receive the message below with confirmation the submission is **Pending Approval**



What Happens Next

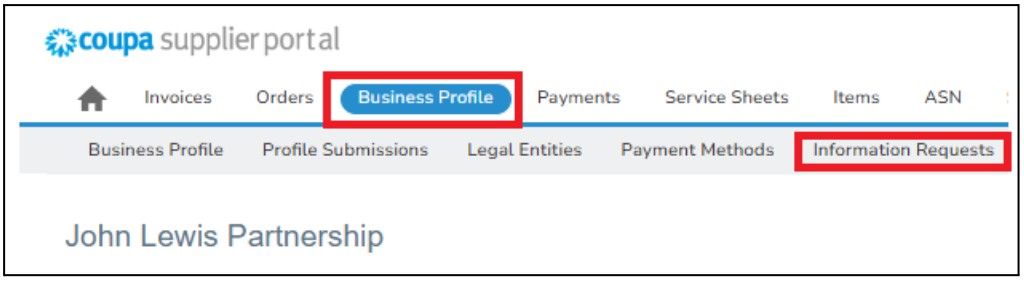
- The John Lewis Partnership will receive and review your submission and may need to contact you directly to discuss the details you have entered
- Once your details are validated by JLP this status will change to **Applied**

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, to complete your details:

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

Link to: Two factor authentication within Coupa Supplier Portal

Link to: Setting Up a Legal Entity in Coupa

Link to: John Lewis EDI Set Up

Link to: User Management