JOHN LEWIS PARTNERSHIP | JOHN LEWIS | WAITROSE

coupa

Registering for an Account on Coupa

For: GNFR Suppliers new to the John Lewis Partnership

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

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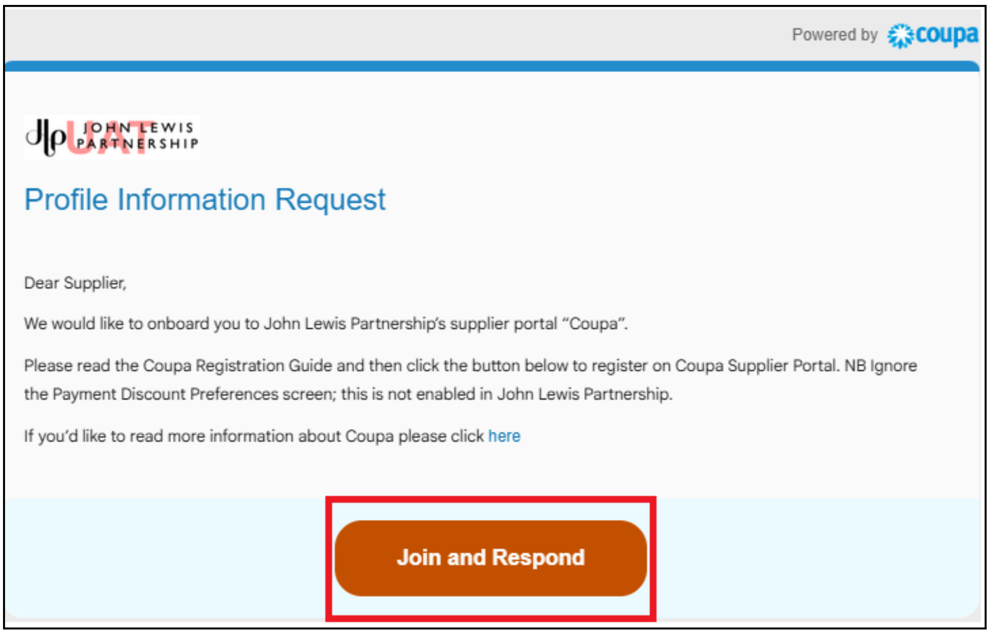
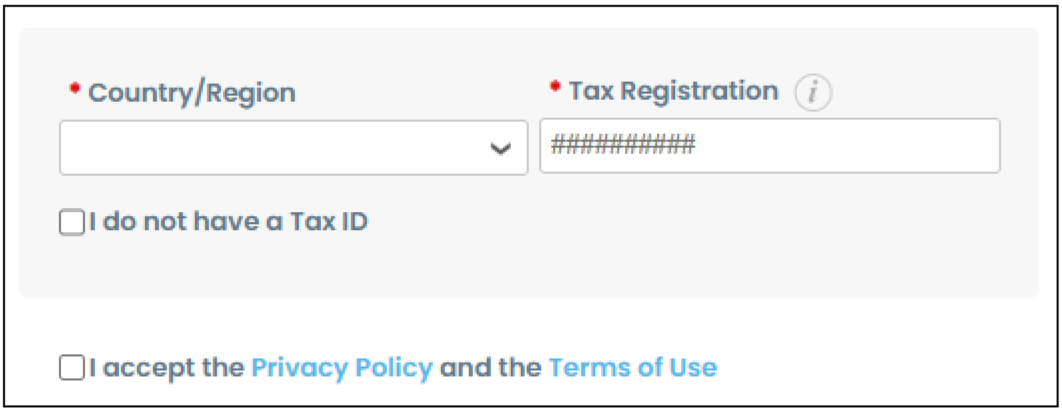
Actions:

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

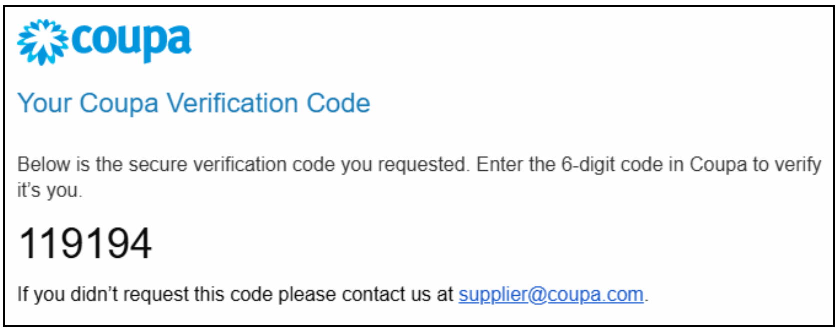


2. **Create** and **Confirm** a **Password** for your new account

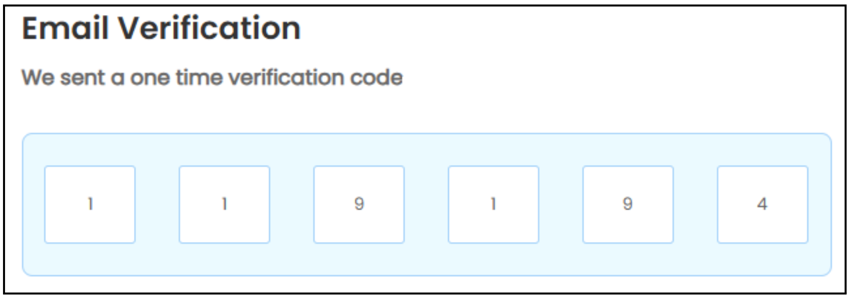
3. Select the **Country** you are based in and where applicable enter your **VAT** or **Tax ID**
4. If you do **not** have a Tax ID **tick** the ‘I do not have a Tax ID’ box and type a reason
5. **Tick** the box to accept the Privacy Policy and Terms of Use once read:



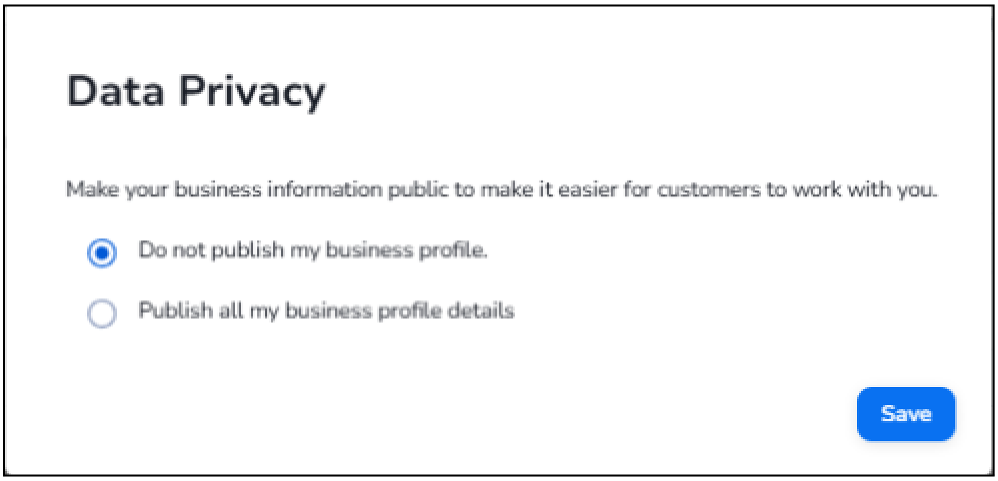
6. Click **Create an account**
7. If you responded to the invite within 24 hours, proceed to Step 10. If you respond to the invite after 24 hours, you will receive an email containing a **six digit verification code** similar to the one below:



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:

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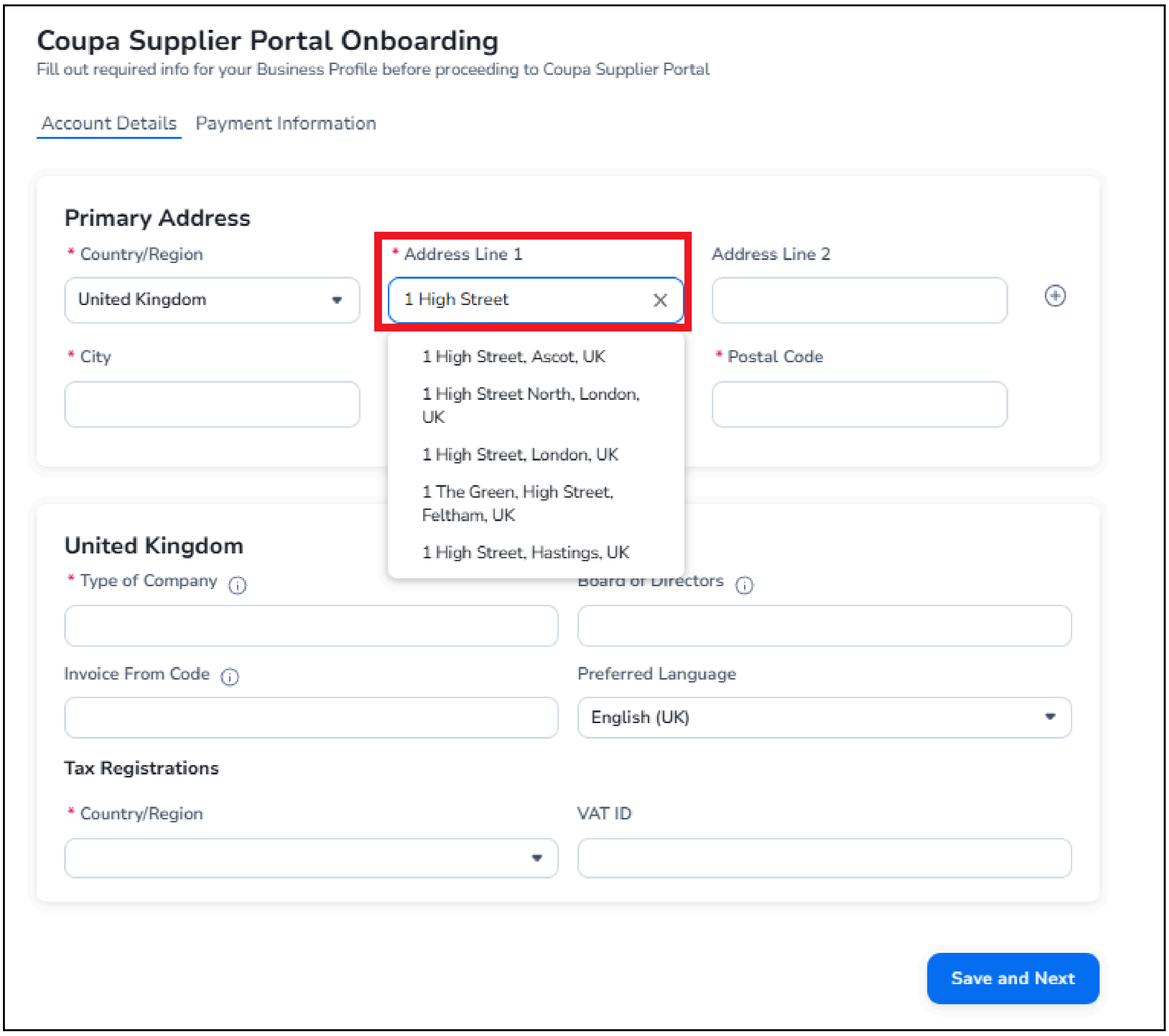
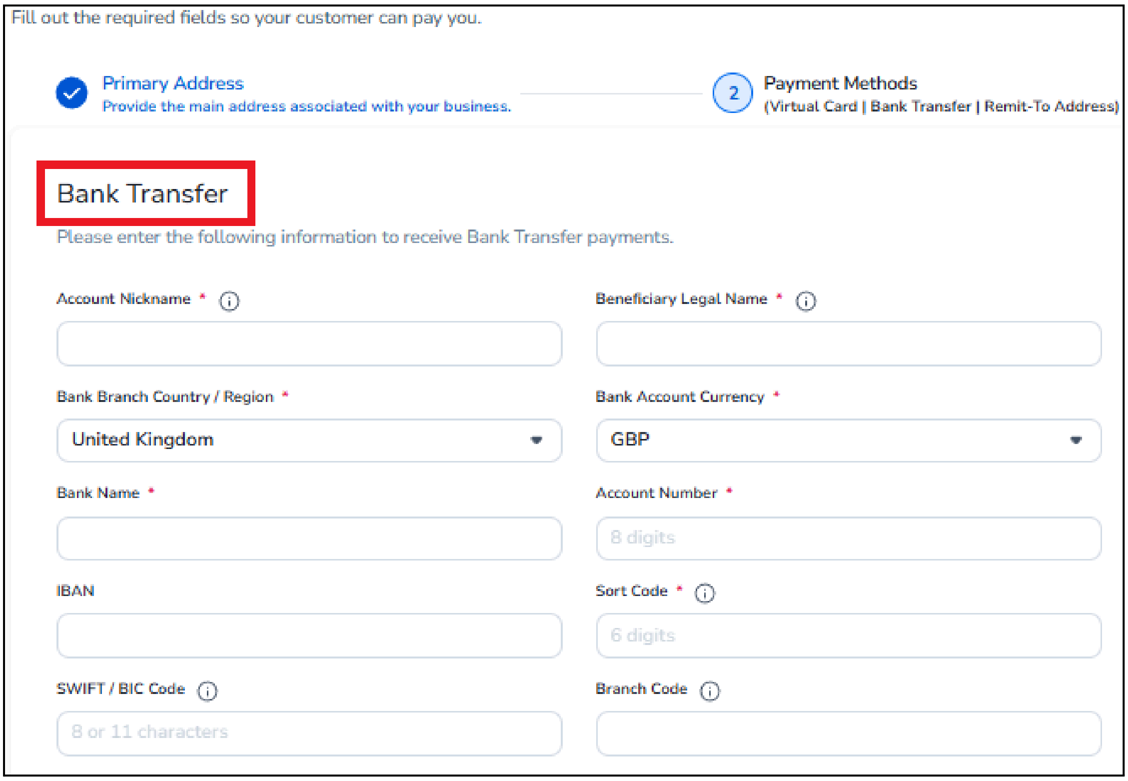
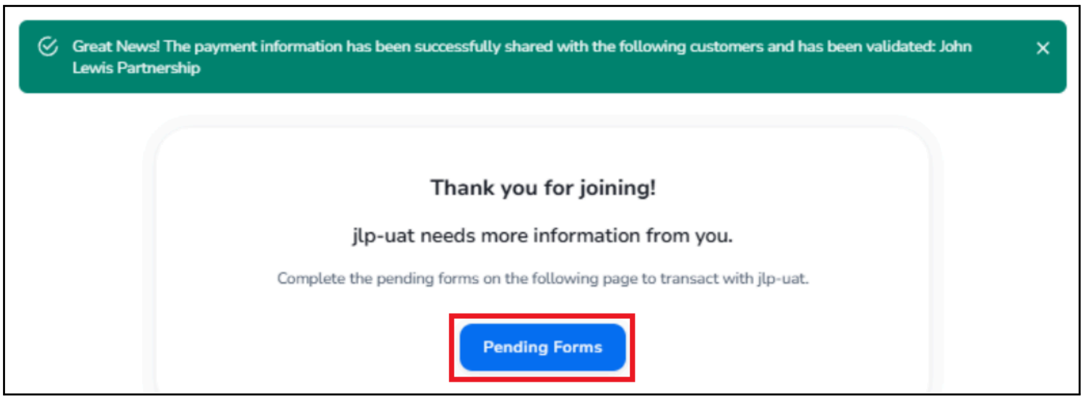


14. Type in your **Type of Company**, confirm your **Country/Region** and **VAT ID** (if applicable) then click **Save and Next**
15. You will then be taken to **Payment Information,** tick the box that says **'Do not accept Virtual Card payments from this customer'** (as this is not this is not enabled in John Lewis Partnership). Click **Save and Next**
16. The next payment method is **Bank Transfer,** complete the required fields (including **Bank Branch Address** and **Contact Information**) then click **Save and Next**:

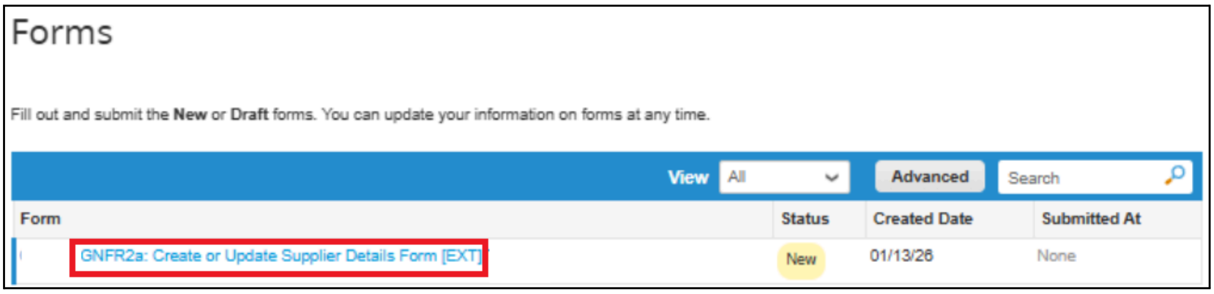


*Note: If you have UK bank details, the postcode for your **Bank Branch Address** must be in capital letters or it will not be accepted, for example 'AB1 2CD', not 'ab1 2cd'*

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 and there will be a form called **GNFR2a: Create or Update Supplier Details Form,** click on this:



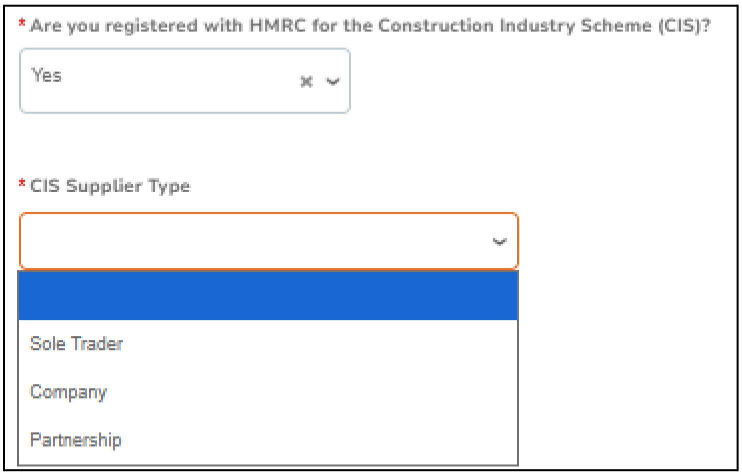
19. Check the **Company Name** is accurate - correct if wrong

*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. Answer the **Sole Trader** question
21. Enter your **Company Registration Number:**
    - 21.1. If you are a **UK registered company** this is provided by Companies House
    - 21.2. If you are registered **outside of the UK**, please enter the registration number from the country where you are based
    - 21.3. If you are **not** a registered company**,** please enter **'Not Registered'**
22. Type in the **Country of Registration** where your organisation is registered
23. If answering **Yes** to **Are you registered with the HMRC for the Construction Industry Scheme (CIS),** select your **CIS Supplier**

Type from the dropdown list (only applicable for CIS Registered Suppliers). If you are not registered, select **No** and proceed to **Step 26**



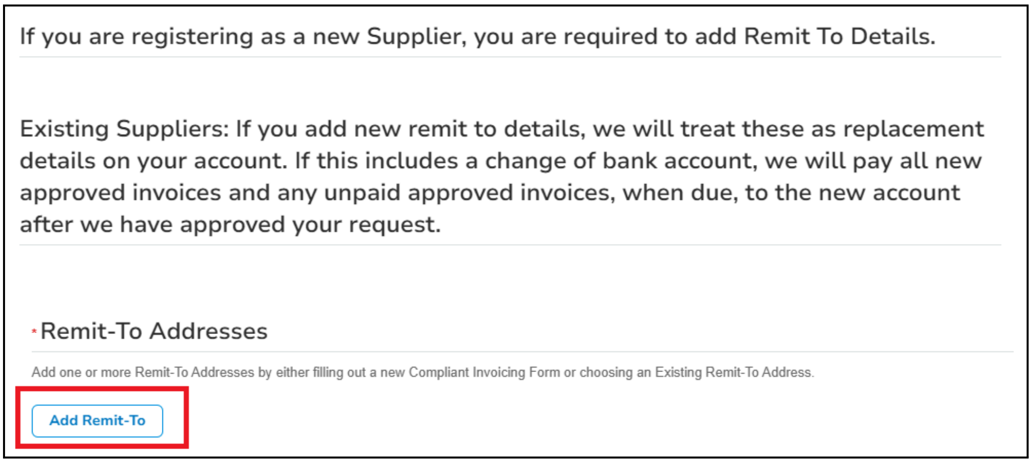
24. Enter your **NI Number** if you are a **Sole Trader** or **Partnership**
25. Enter your **Partnership Name** and **Partnership UTR Number** (if applicable)
26. Enter your **UTR Number** (if applicable) and **tick** the box to **accept the CIS details you have provided are up to date and correct**
27. Enter your **Currency** (e.g. GBP)
28. Answer the question **Yes** or **No** regarding **Self Billing**
    28.1. Where **Yes** is answered, you <u>**must**</u> have prior agreement from your JLP contact that you are approved for Self Billing, JLP will send you the agreement after this form is submitted and approved
    28.2. Where **No** is answered, you will be asked a question regarding **eInvoicing**:

28.2.1. Selecting ‘Coupa Supplier Portal’ means you will submit your own invoices against Purchase Orders in Coupa.

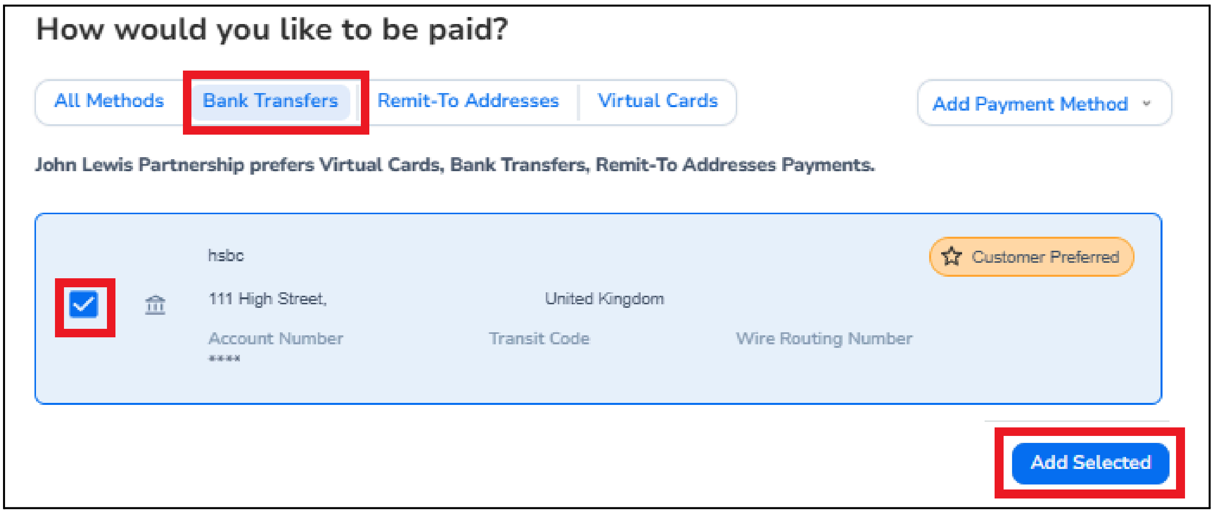
28.2.2. ‘Tungsten’ means you will use a Third Party who act as a go-between to prepare and present your invoices to JLP

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

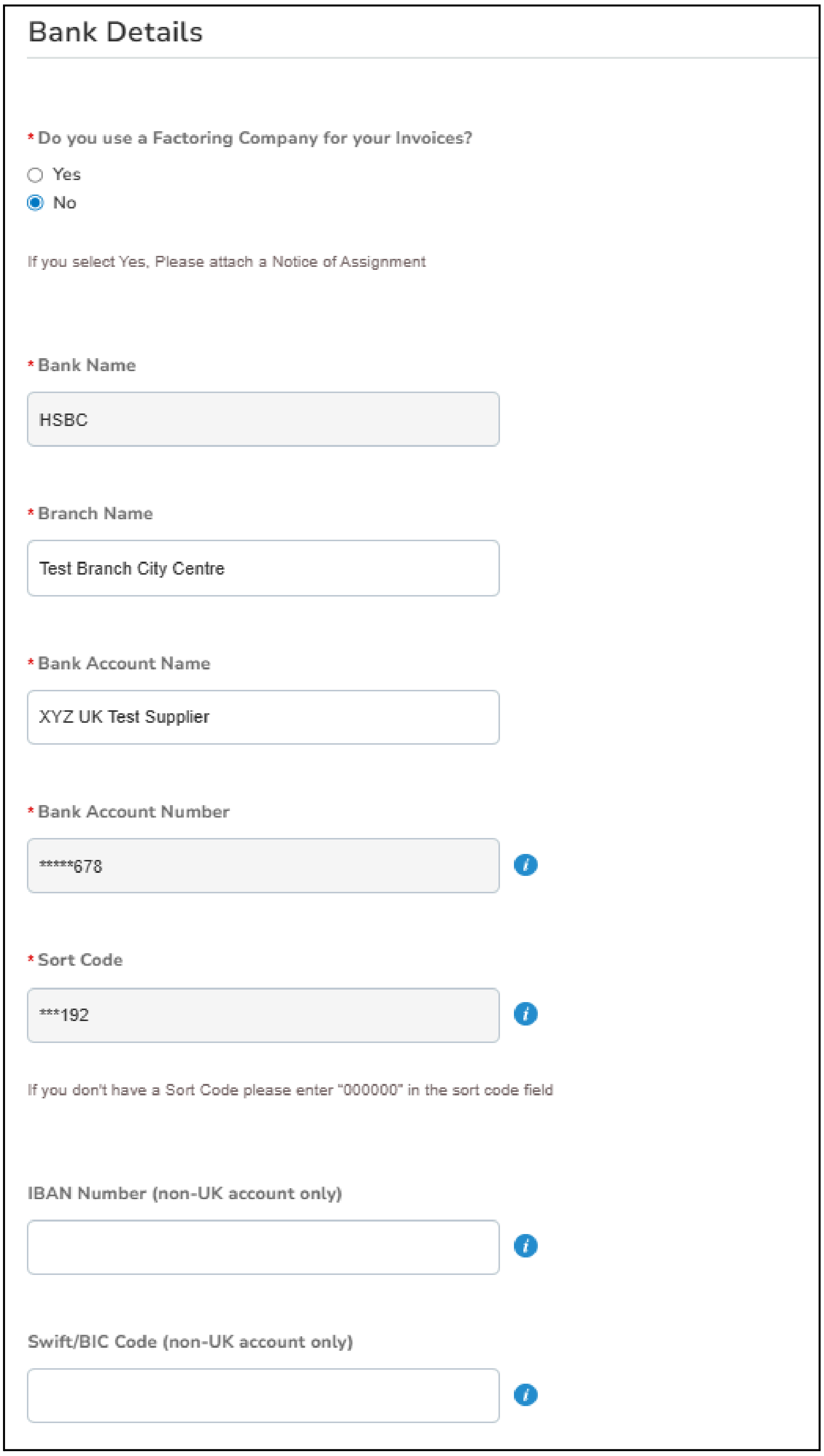
30. Enter an email address which you would like to use to receive **Purchase Orders** from the John Lewis Partnership (JLP)
31. In the **Company Address** section, the address is pulled from when you first registered, check that it is accurate - correct if wrong
32. In the **Remit-To Addresses** section, click **Add Remit-To**
33. Complete the **Contact Details** section if any fields are incomplete
34. Complete the **Company Details** section if any of the fields are incomplete
35. Answer **Yes** to the question ‘Are you registering as a new supplier?’
36. Click **Add Remit-To**:



37. Select **Bank Transfers** (do **not** select Virtual Cards) by ticking the box and then click **Add Selected:**



38. In the **Remit-To Addresses** section you can now answer the **VAT Details** questions regarding **VAT** or **GST,** attach **Group VAT Certificate** if **Yes**
39. Enter or add more details of your **Bank Account** (example below)
40. Answer the question on **Factoring**
    40.1. If **Yes** is answered then please use the **Choose File** button to attach a copy of your ‘Factor Notice of Assignment’



Bank Details

* Do you use a Factoring Company for your Invoices?

- ○ Yes
- ◉ No

If you select Yes, Please attach a Notice of Assignment

* Bank Name

HSBC

* Branch Name

Test Branch City Centre

* Bank Account Name

XYZ UK Test Supplier

* Bank Account Number

*****678

* Sort Code

***192

If you don't have a Sort Code please enter "000000" in the sort code field

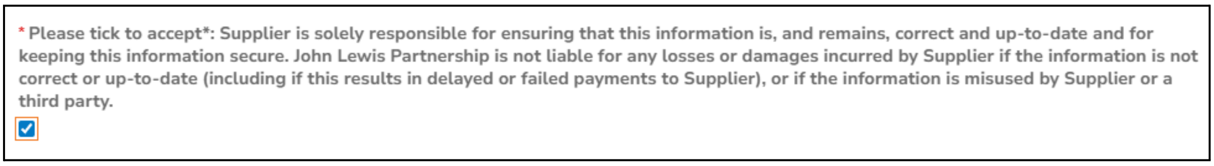
IBAN Number (non-UK account only)

Swift/BIC Code (non-UK account only)

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

42. Enter a **Remittance Email Address** where you would like your remittance advices sent to

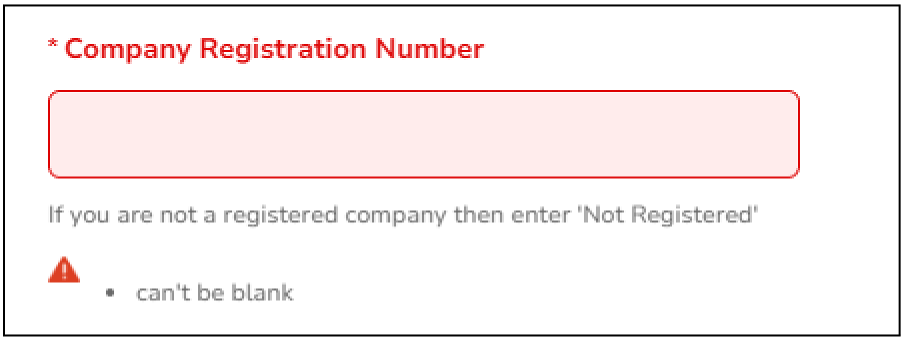
43. **Tick** the box to accept the statement shown below:



44. Click **Submit for Approval**

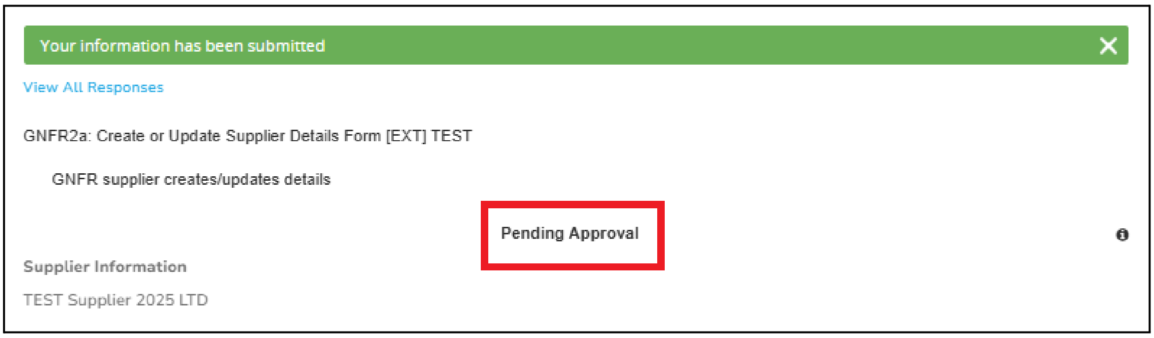
If all fields are completed correctly you will receive a confirmation message (see screenshot in step 46). If, however, one or more of the mandatory fields are missing information you will receive this error message:

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



46. 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:

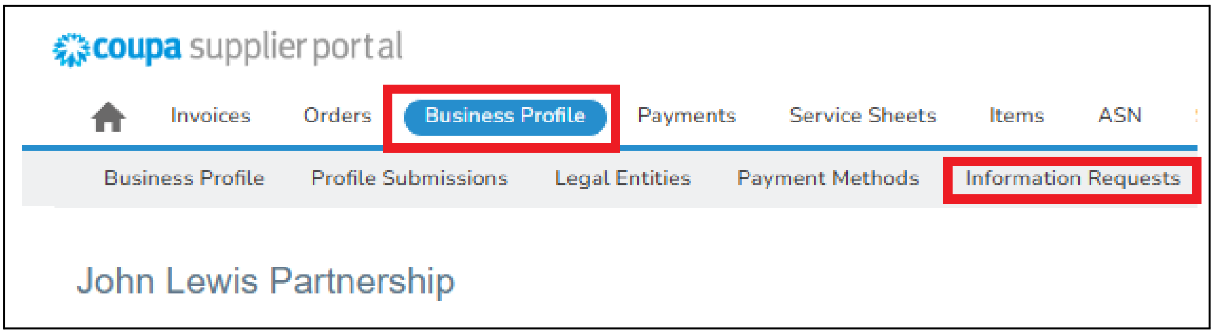
- The John Lewis Partnership will receive and review your submission and may need to contact you directly to discuss the details you have entered.
- Once your details are validated by JLP this status will change to **Applied.**

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