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

> **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.

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

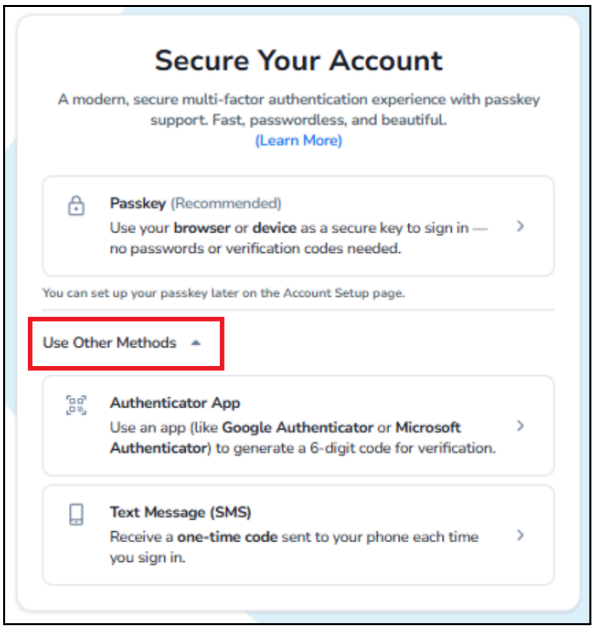
   If you are not tax registered, tick the box 'I do not have a Tax ID' and a Reason - eg "Not registered for Tax"

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

6. Click **Create an Account**

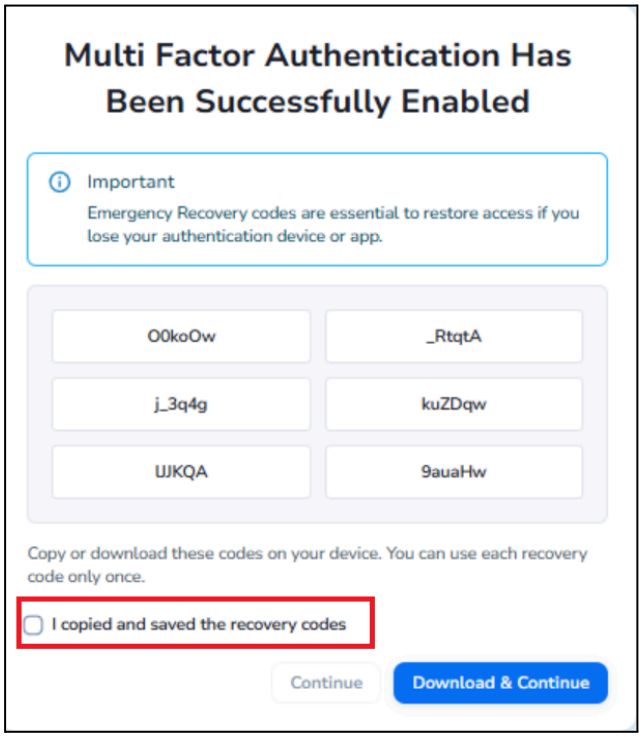
Next you will be asked to secure your coupa account

7. Select a method to secure your account, click on **Use Other Methods** to see all available options:



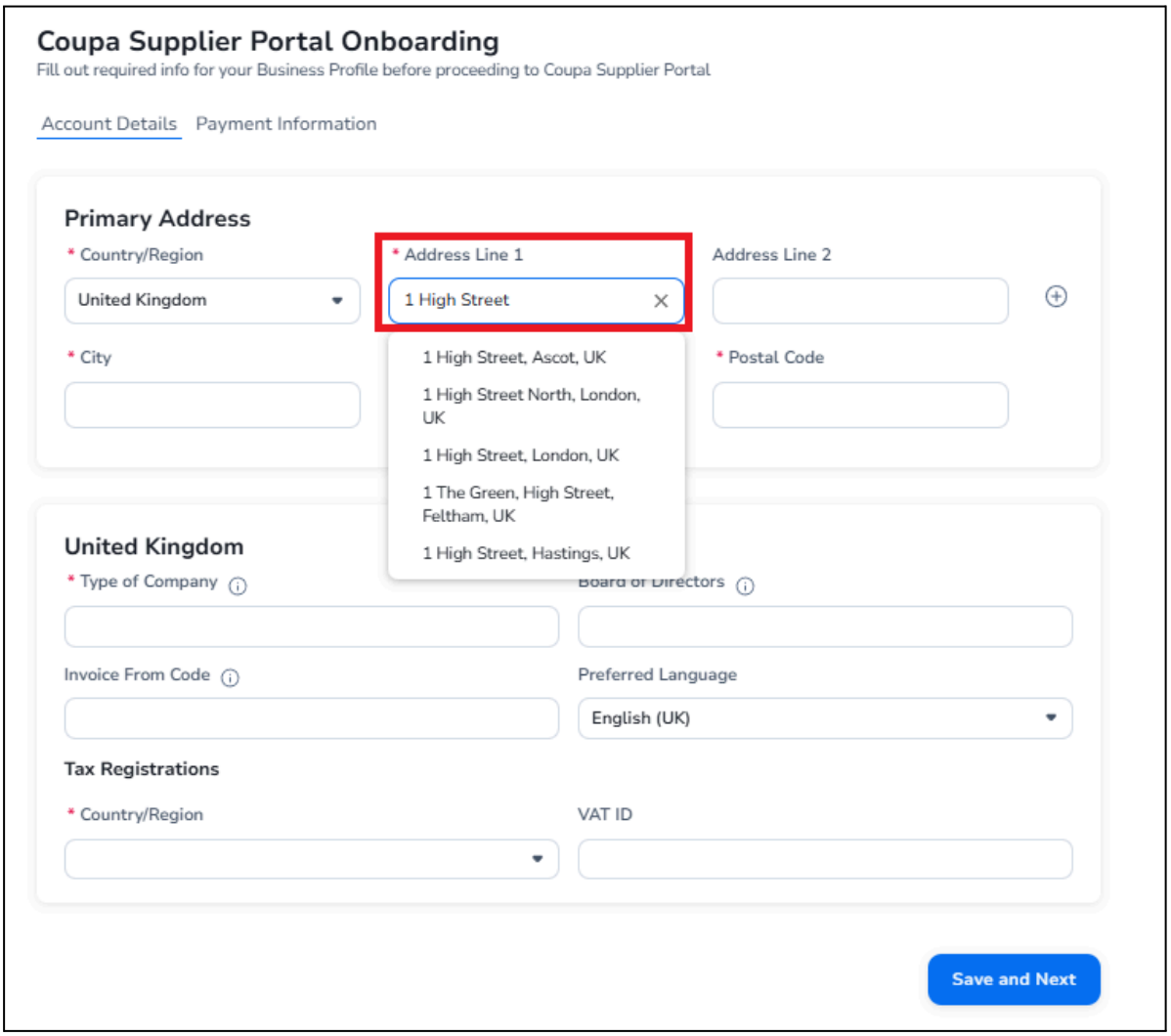
***Note**: If you select Text Message (SMS) this phone number will be kept on record with Coupa for future authentication*

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

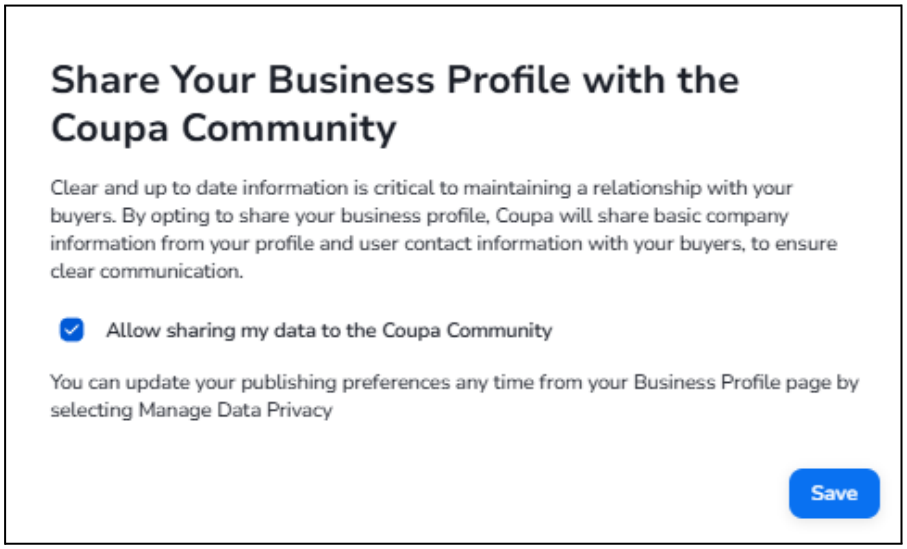
10. Begin typing the **first line of your address** in the 'Address Line 1' field and select the correct option from the search results, the remaining address fields should populate



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

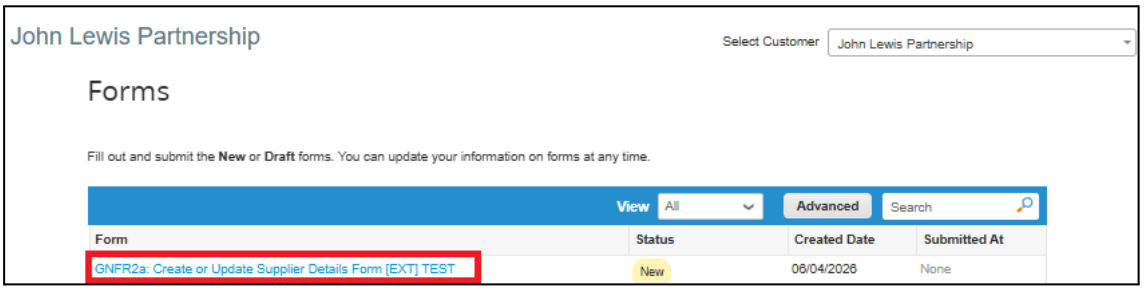
12. Next, you will see confirmation you have joined Coupa

13. Answer the question about publishing your **Business Profile** and click **Save**



***Note**: This decision will not impact your registration with JLP*

14. You will now be taken to the **Form Responses** page and there should be a form called **GNFR2a: Create or Update Supplier Details Form,** click on it



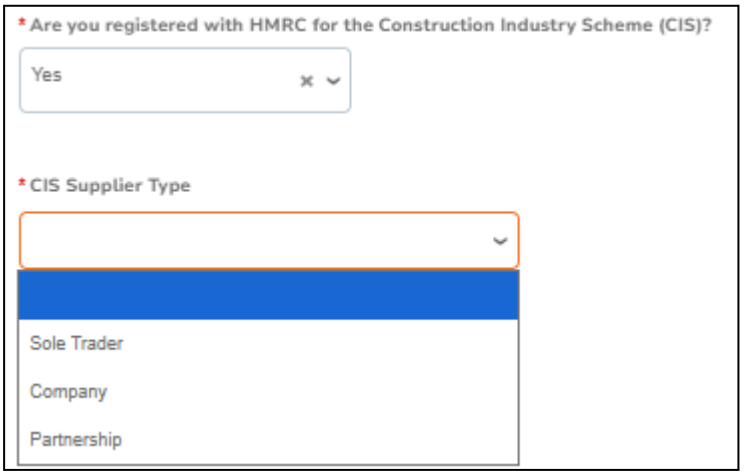
***Note**: If you are logged out, you can locate this form by logging back into Coupa, clicking on **Business Profile > Information Requests** in the top menu bar*

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

***Note**: This should match what is on Companies House/HMRC unless you are group VAT registered. This includes matching if 'Limited' is shortened to 'Ltd'*

16. Enter your Company Registration Number - or enter 'Not Registered' if you are not a registered company

17. Answer the **Sole Trader** question
18. Enter your **Company Registration Number:**
    - 18.1. If you are a **UK registered company** this is provided by Companies House
    - 18.2. If you are registered **outside of the UK**, please enter the registration number from the country where you are based
    - 18.3. If you are **not** a registered company**,** please enter **'Not Registered'**
19. Type in the **Country of Registration** where your organisation is registered
20. 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 24**



21. Enter your **NI Number** if you are a **Sole Trader** or **Partnership**
22. Enter your **Partnership Name** and **Partnership UTR Number** (if applicable)

23. Enter your **UTR Number** (if applicable) and **tick** the box to **accept the CIS details you have provided are up to date and correct**

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

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

    25.1. Where **Yes** is answered, you **must** 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

    25.2. Where **No** is answered you will be asked a question regarding eInvoicing:

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

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

26. Next, 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

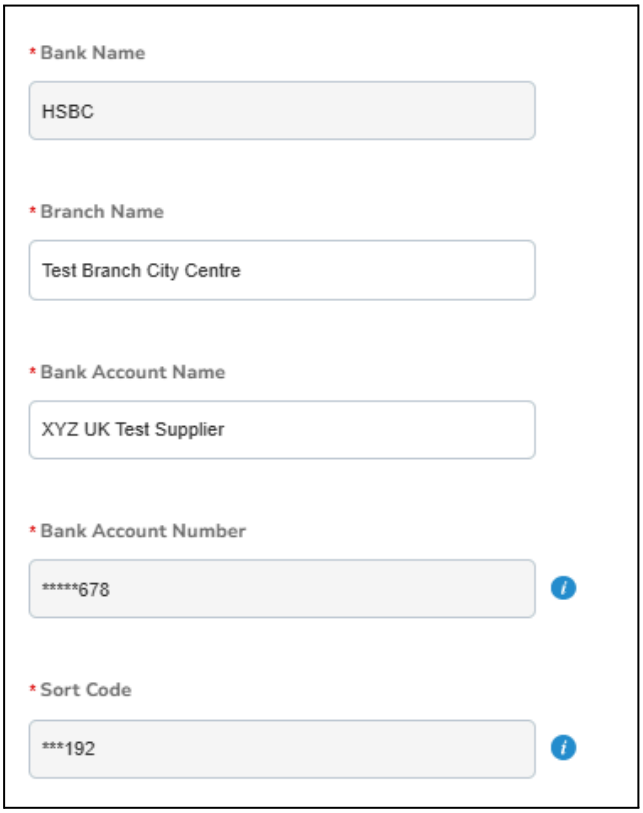
Note**: If a payment method needs setting up, please select **Bank Transfers** and complete the relevant information (do **not** select Checks or Credit Cards as this is not accepted by JLP) and click **Save

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

28. In the **Remit-To Addresses** section you can now answer the **VAT Details** questions regarding **VAT** or **GST,** attach **Group VAT Certificate** if **Yes**

29. Enter or add more details of your **Bank Account** (example below) and attach **Proof of Bank Details** in the **Banking Supporting Document** section by clicking **Add File**

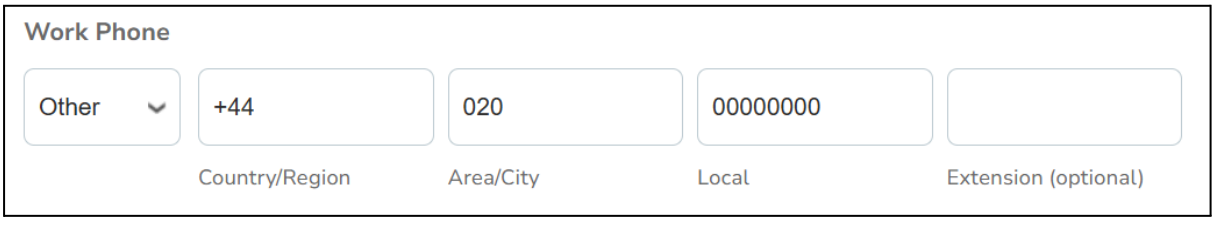
***Note**: we accept a PDF or Photo of your bank statement header, a blank cheque or bank paying in slip. JLP does not need to see any of your transactions, but we do need to see a formal bank document showing your **Account Name, Account Number** and **Account Sort Cod**e. JLP will use this information to verify that the payment it makes reaches the correct account safely*



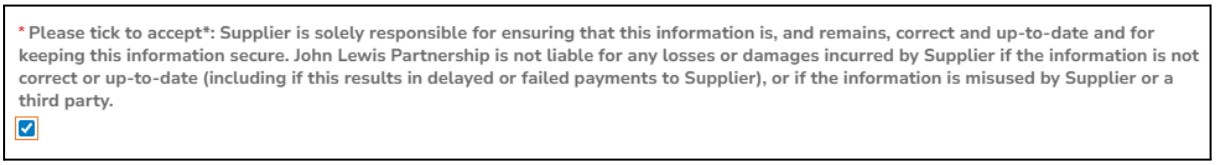
30. Complete any **missing mandatory fields** regarding details of your bank (mandatory fields are marked *)

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

32. 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



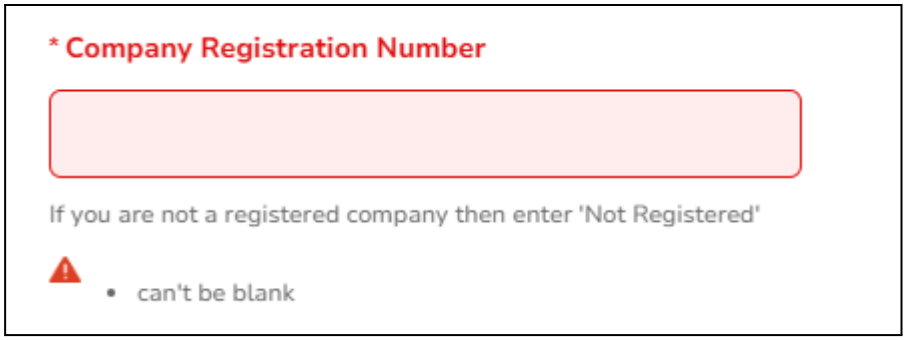
33. **Tick** the box to accept the statement shown below



34. Click **Submit for Approval**

    If all fields are completed correctly you will receive a confirmation message (see screenshot in step 36). If, however, one or more of the mandatory fields are missing information you will receive this error message

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



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

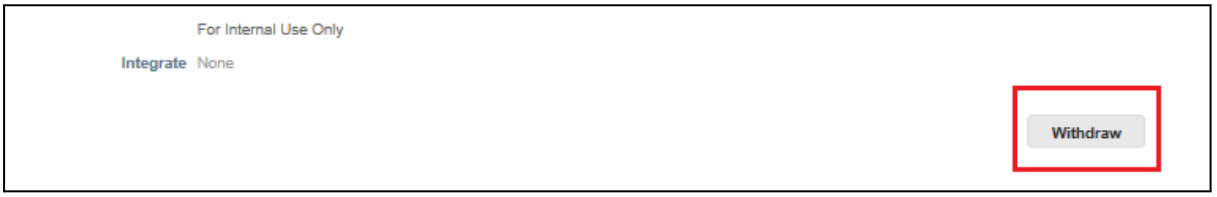
On submission, you will receive the message below with confirmation the submission is **Pending Approval**

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.**

If you have entered any of the details incorrectly, you can amend them by scrolling to the bottom of the form and pressing **Withdraw.**

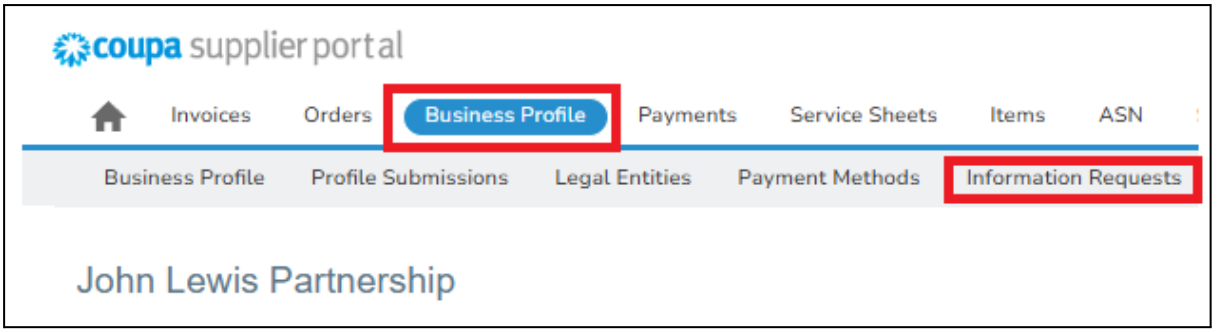
You can then amend the details and re-submit for approval, as above.



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