Registering for an Account on Coupa

For: Home Services Suppliers new to the John Lewis Partnership

Purpose:

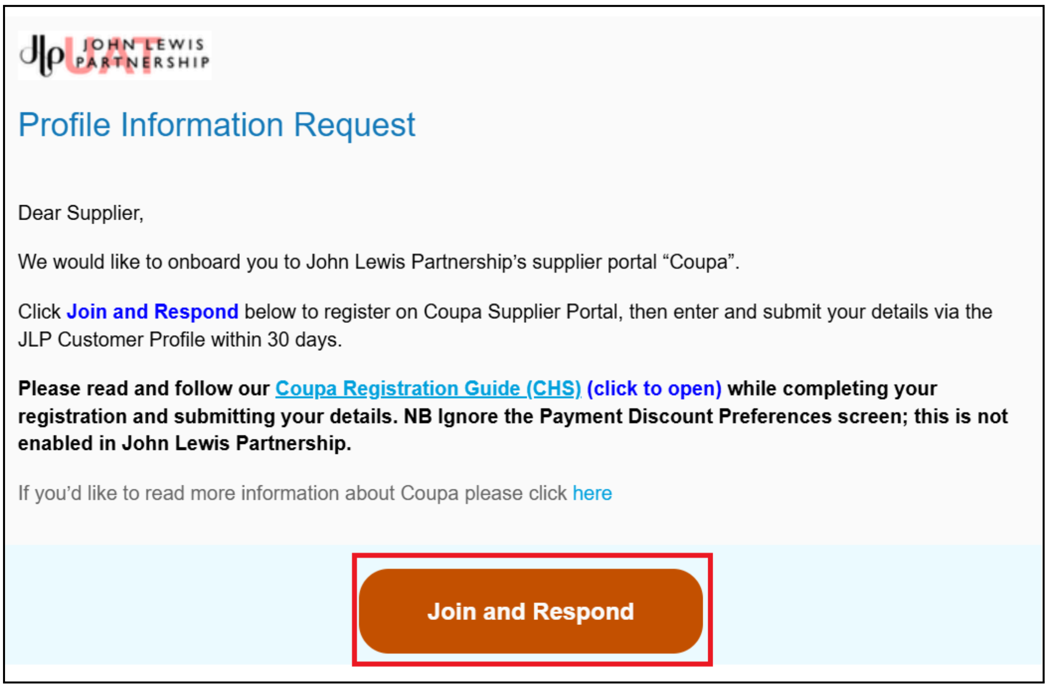
This guide explains how to register for a supplier account on the **Coupa Supplier Portal**. Note: mandatory fields in Coupa are marked *

Frequency:

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

Actions:

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



Profile Information Request

Dear Supplier,

We would like to onboard you to John Lewis Partnership's supplier portal "Coupa".

Click **Join and Respond** below to register on Coupa Supplier Portal, then enter and submit your details via the JLP Customer Profile within 30 days.

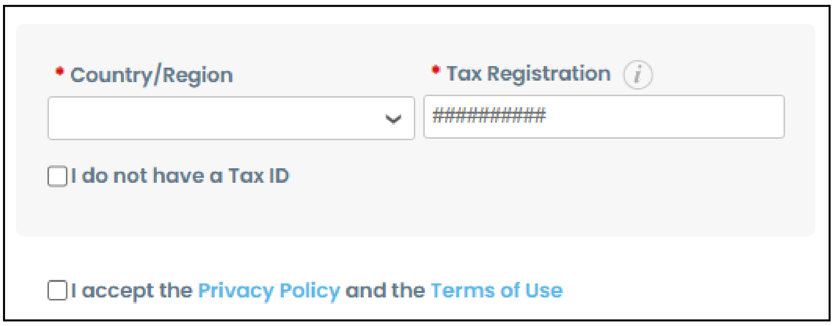
Please read and follow our Coupa Registration Guide (CHS) (click to open) while completing your registration and submitting your details. NB Ignore the Payment Discount Preferences screen; this is not enabled in John Lewis Partnership.

If you'd like to read more information about Coupa please click here

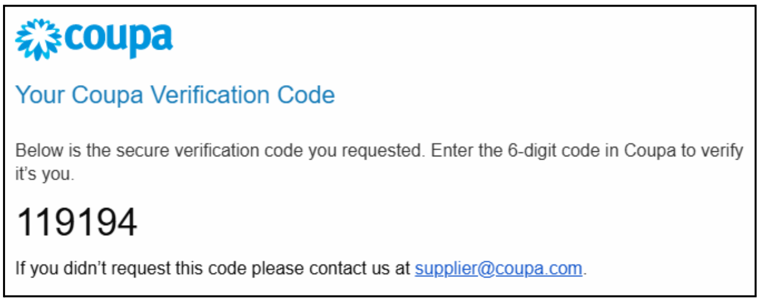
Join and Respond

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

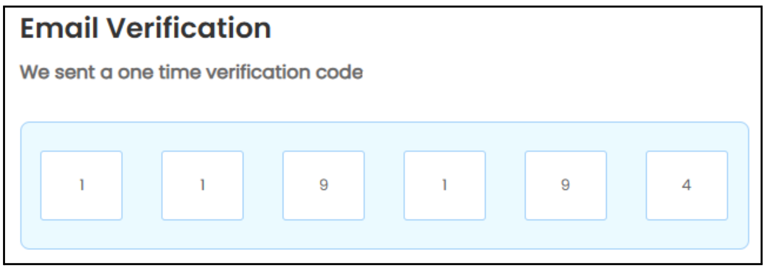
3. Select the **Country** you are based in and where applicable enter your **VAT** or **Tax ID**
4. If you do **not** have a Tax ID **tick** the ‘I do not have a Tax ID’ box and type a reason
5. **Tick** the box to accept the Privacy Policy and Terms of Use once read:



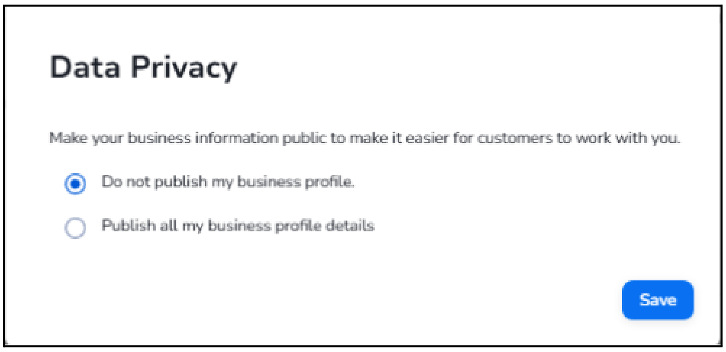
6. Click **Create an Account**
7. If you responded to the invite within 24 hours, proceed to Step 10. If you respond to the invite after 24 hours, you will receive an email containing a **six digit verification code** similar to the one below:



8. Enter the received code into Coupa:

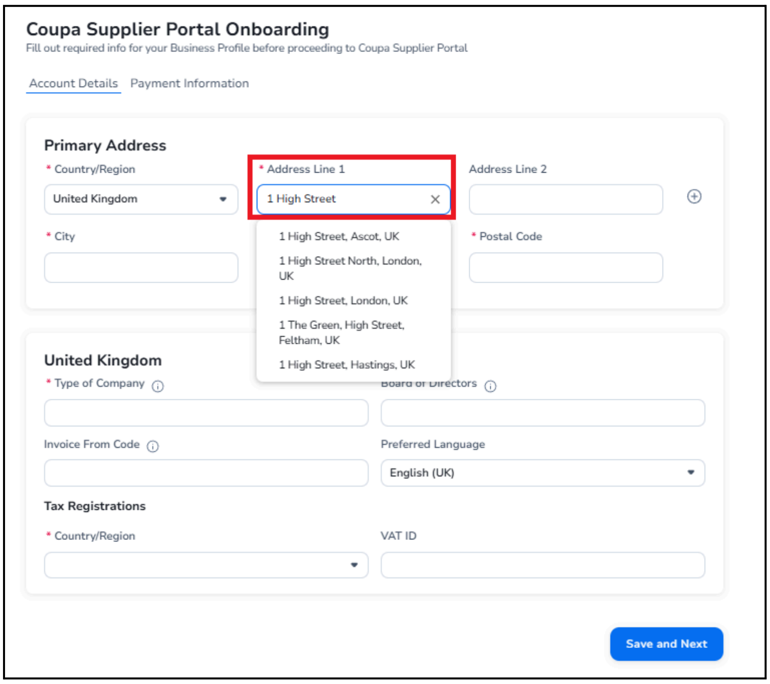


9. Click **Next**
10. Next, answer the question about publishing your **business profile** and click **Save**

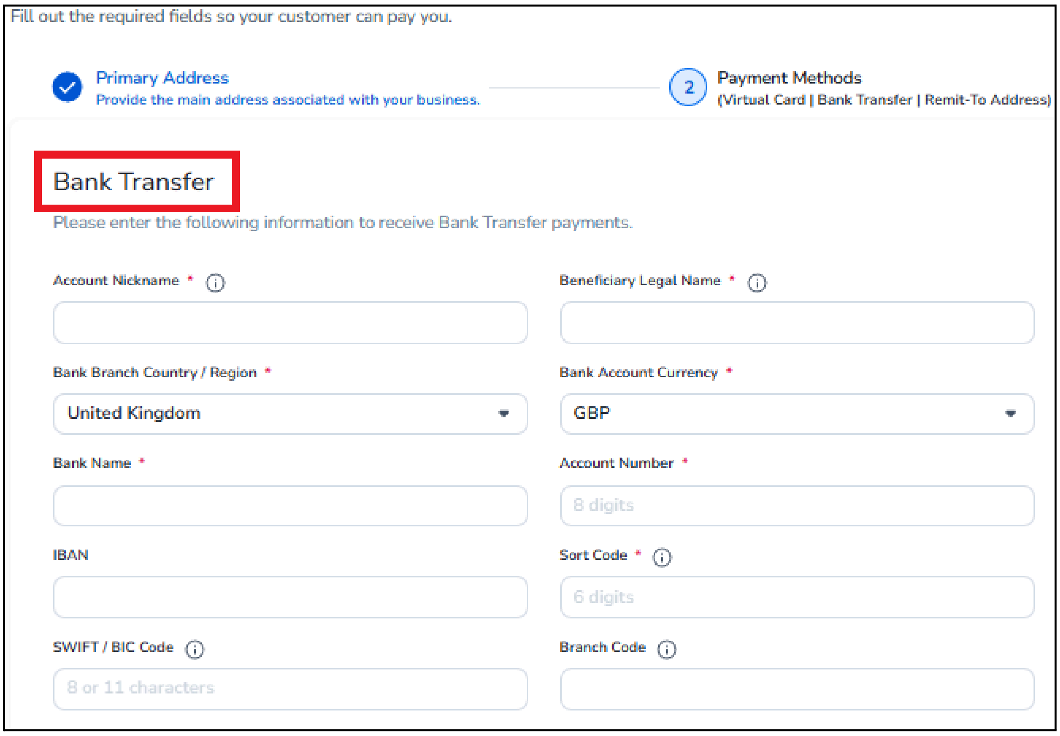


Note: This decision will not impact your registration with JLP

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:

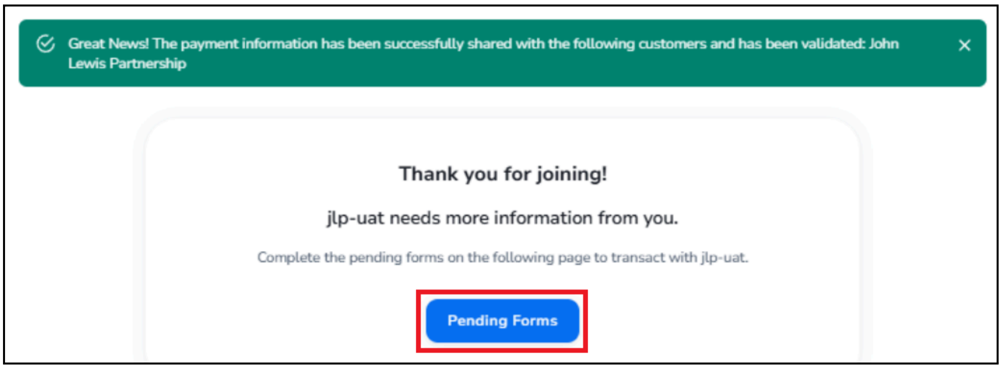


14. Type in your **Type of Company**, confirm your **Country/Region** and **VAT ID** (if applicable) then click **Save and Next**
15. You will then be taken to **Payment Information,** tick the box that says **'Do not accept Virtual Card payments from this customer'** (as this is not this is not enabled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

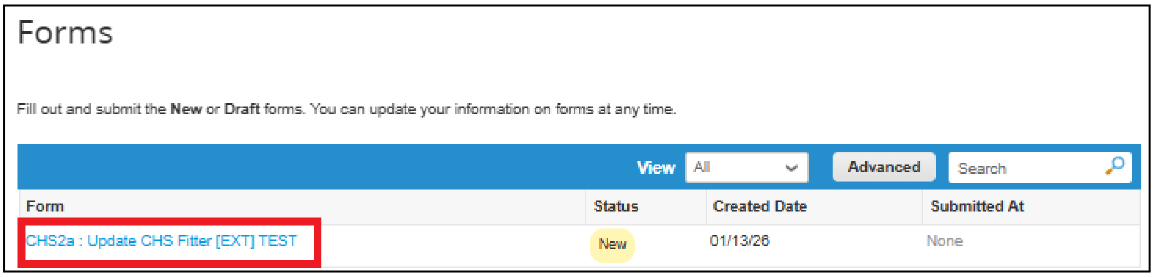


*Note: If you have UK bank details, the postcode for your **Bank Branch Address** must be in capital letters or it will not be accepted, for example 'AB1 2CD', not 'ab1 2cd'*

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 called **CHS2a: Update CHS Fitter [EXT],** click on this:



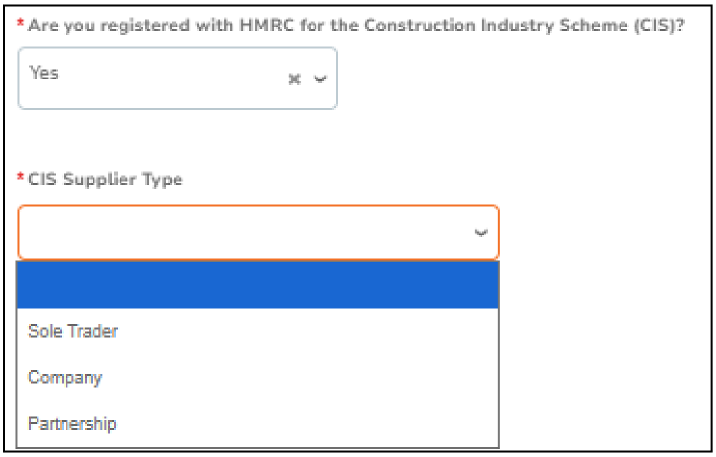
19. Check the **Company Name** is accurate - correct if wrong

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'

20. Answer the **Fitting Service** question and then tick the boxes for all **skills and capabilities** you have
21. Enter your **Company Registration Number** or, if not registered, enter "Not Registered"
22. 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**

Note: If you are a Fitted Kitchens Supplier, you must be registered for CIS



23. Enter your **NI Number** if you are a **Sole Trader** or **Partnership**
24. Enter your **Partnership Name** and **Partnership UTR Number** (if applicable)
25. Enter your **UTR Number** (if applicable) and **tick** the box to **accept the CIS details you have provided are up to date and correct**
26. Enter your **Currency** (e.g. GBP)
27. Answer **No** to the question regarding **Self Billing** as this is not set up for Home Services Suppliers.
    27.1. Where **No** is answered you will be asked a question regarding eInvoicing:
        27.1.1. Selecting 'Coupa Supplier Portal' means you will submit your own invoices against Purchase Orders in Coupa

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

28. Attach your **Public Liability Insurance** and enter the **Expiry Date**

29. Attach **DBS, Gas Safety, Electrical Safety** and **Asbestos Certificates** if you have them

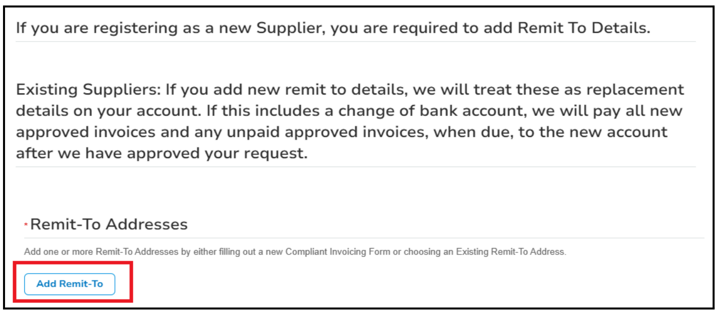
Note: these certificates are not mandatory to attach, however, if you do not hold a certain certificate, e.g. Asbestos Certificate, after Coupa registration, the Fitter Manager may help you sign up to a course

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

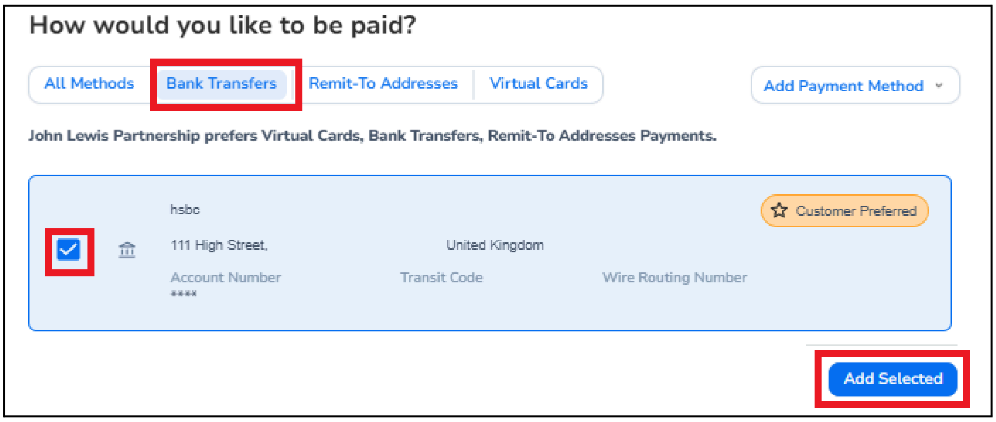
31. Enter an email address which you would like to use to receive **Purchase Orders** from the John Lewis Partnership (JLP)

32. In the **Company Address** section, the address may be pulled from when you first registered, check that it is accurate - correct if wrong or enter it in

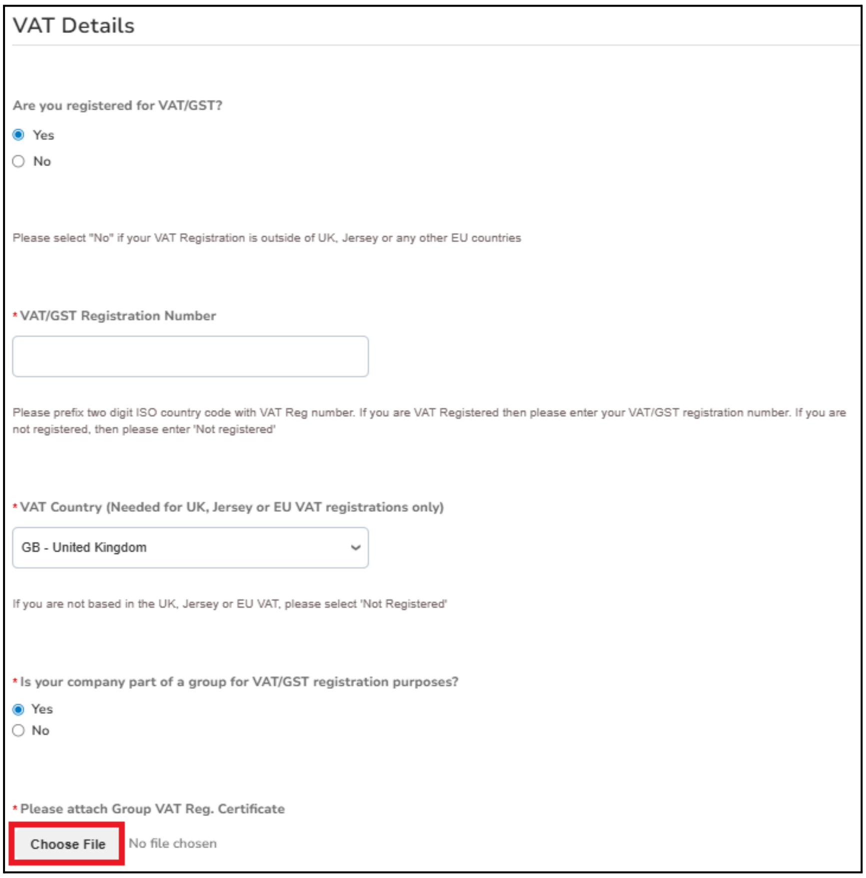
33. In the **Remit-To Addresses** section, click **Add Remit-To**:



34. Select **Bank Transfers** (do **not** select Virtual Cards) and then click **Add Selected**



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



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

37. Answer the question on **Factoring**

    37.1. 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)

38. Complete any **missing mandatory fields** regarding details of your bank (mandatory fields are marked *)
39. Enter a **Remittance Email Address** where you would like your remittance advices sent to
40. **Tick** the box to accept the statement shown below:

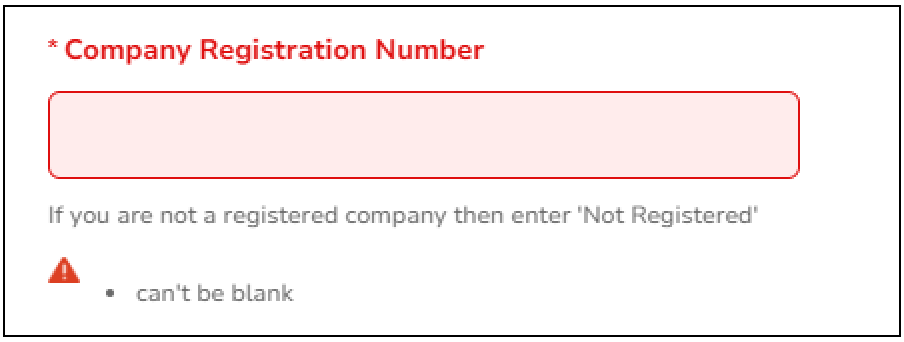
> * Please tick to accept*: Supplier is solely responsible for ensuring that this information is, and remains, correct and up-to-date and for keeping this information secure. John Lewis Partnership is not liable for any losses or damages incurred by Supplier if the information is not correct or up-to-date (including if this results in delayed or failed payments to Supplier), or if the information is misused by Supplier or a third party.
> ☑

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:

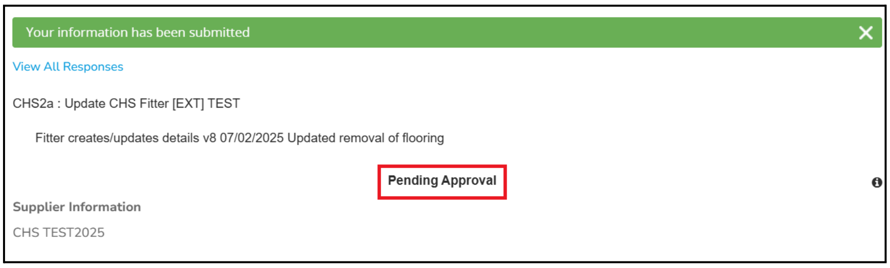
Please fix the errors below

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

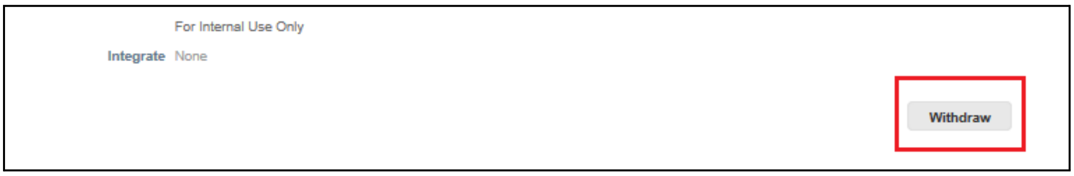
On successful submission, you will receive this message and the status of which will be **Pending Approval**



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.



You will also be sent:

- A copy of your contract separately via **Docusign**. The Docusign email sent will contain a link for you to click on to easily electronically sign your contract and send it back to us
- An email to register with **Coupa Risk Assess**, which is how renewal documentation will be updated such as Public Liability

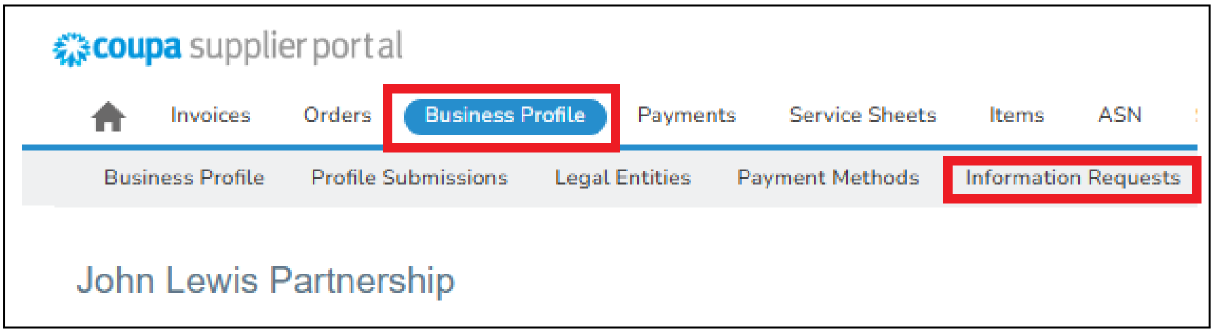
Insurance. On first time use, an email and log in code will be sent to allow you to set up a Password so you can log in and upload documents when prompted

If you have any questions/issues with this section please speak to your Fitter Manager as the first port of call.

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]