Registering for an Account on Coupa

For: Home Services 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

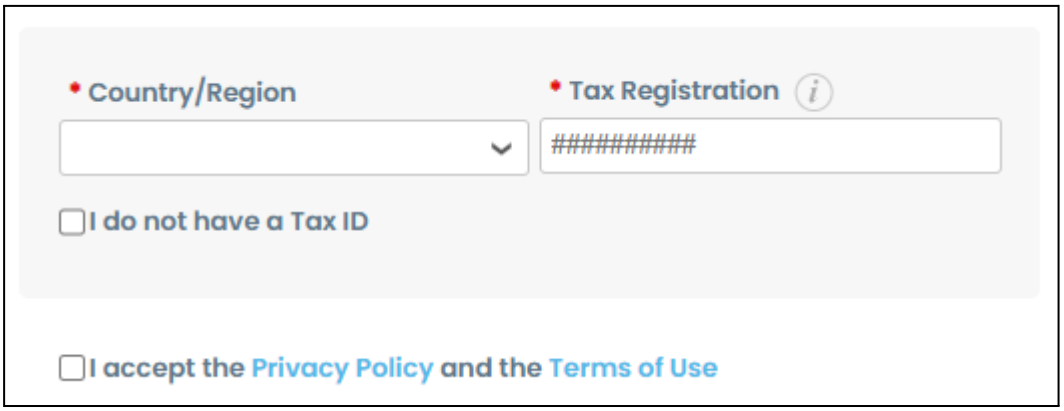
Important: Please note that **Multi Factor Authentication** is enabled within Coupa and can not be disabled. Please ensure you maintain the Multi Factor Authentication codes, passkeys or apps for any future Coupa actions with the John Lewis Partnership or other organisations you may transact with.

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**

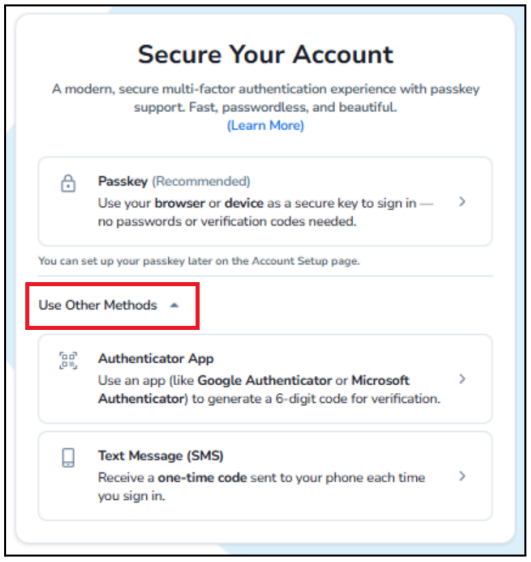
4. If you do **not** have a Tax ID **tick** the 'I do not have a Tax ID' box and type a reason

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



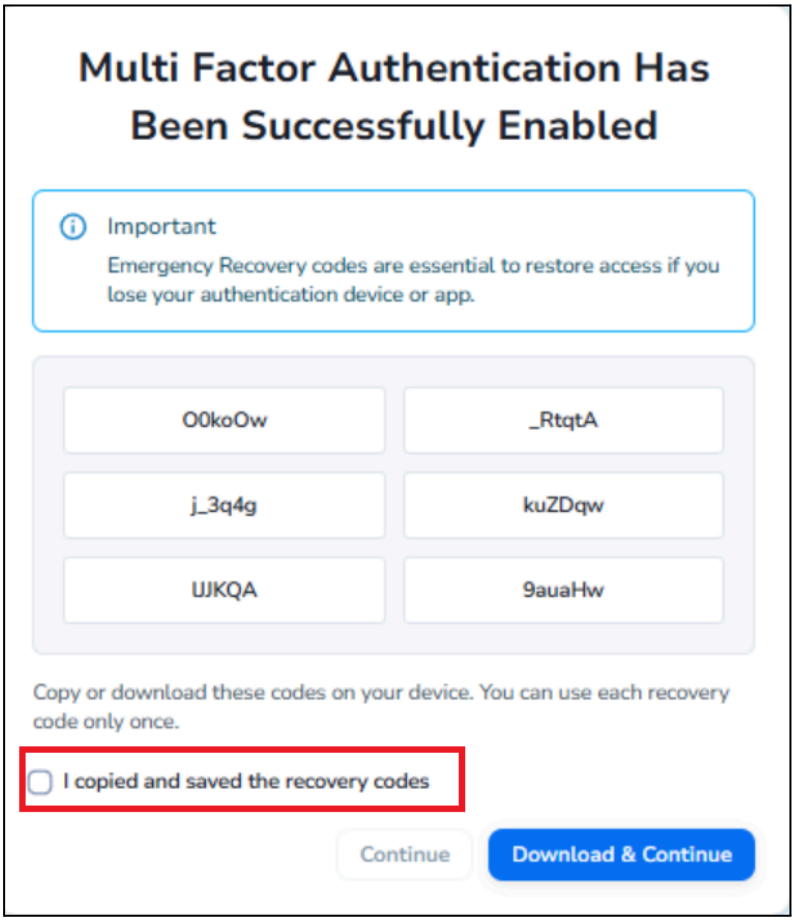
6. Click **Create an Account**

7. Next you will be asked to secure your coupa account. Select a method to secure your account, click on **Use Other Methods** to see all available options



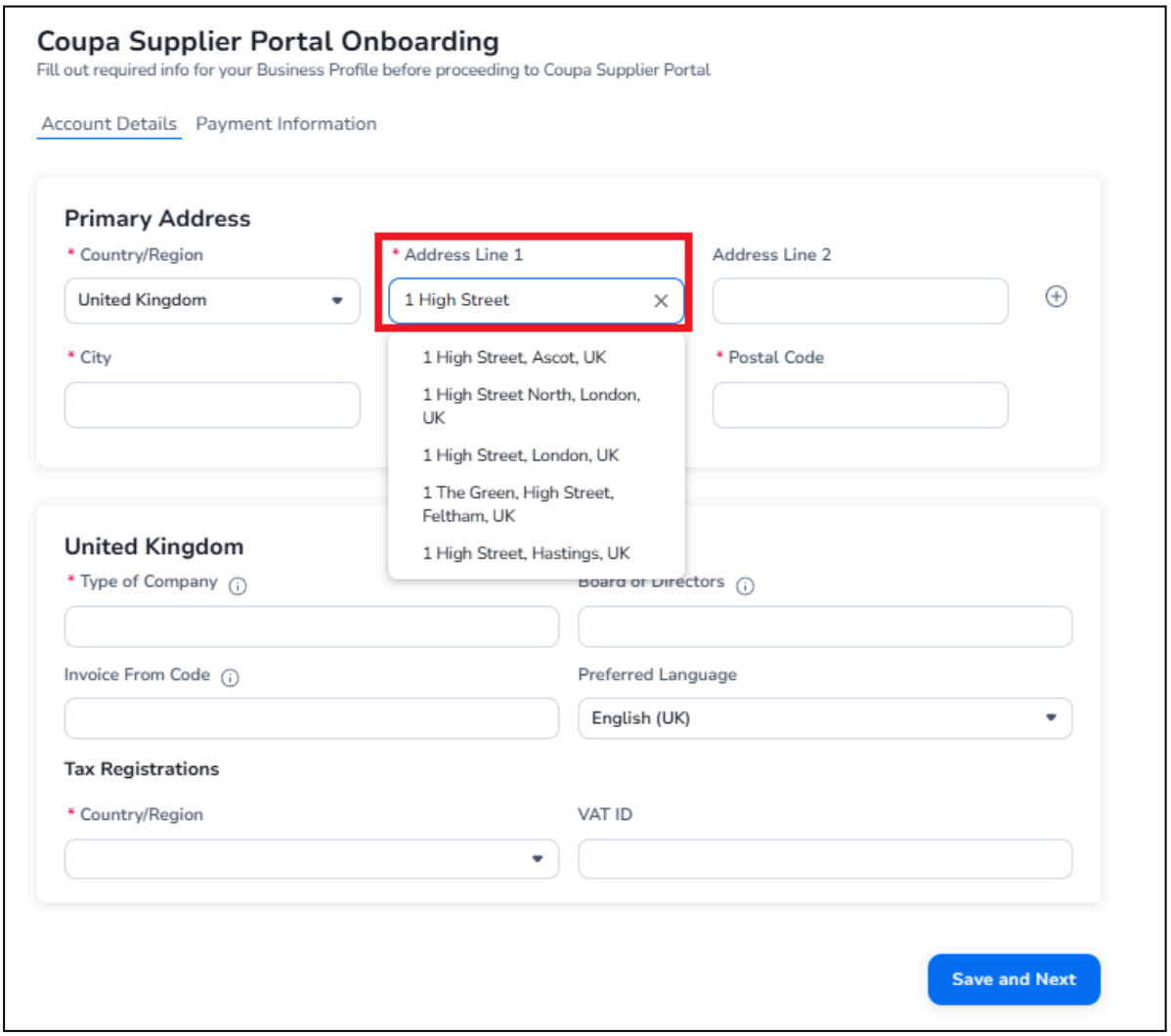
***Note**: If you select Text Message (SMS) this phone number will be kept on record with Coupa for future authentication*

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

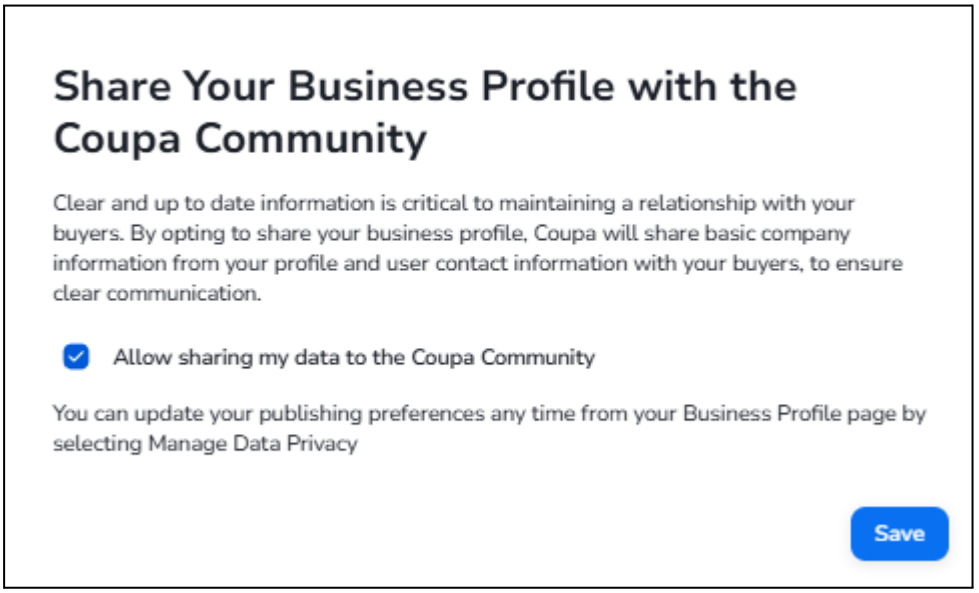
10. Begin typing the **first line of your address** in the 'Address Line 1' field and select the correct option from the search results, the remaining address fields should populate



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

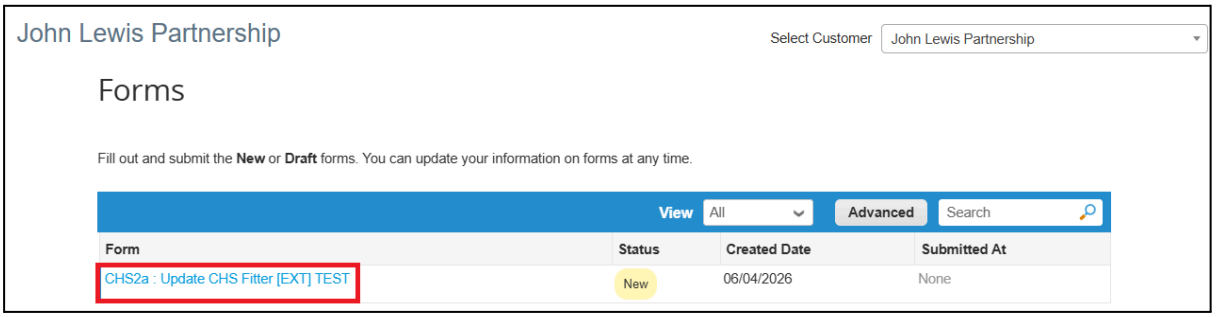
12. Next, you will see confirmation you have joined Coupa

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 **CHS2a: Update CHS Fitter [EXT],** 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. Answer the **Fitting Service** question and then tick the boxes for all **skills and capabilities** you have

17. Enter your **Company Registration Number** or, if not registered, enter “Not Registered”

18. 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 22**

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

19. Enter your **NI Number** if you are a **Sole Trader** or **Partnership**

20. Enter your **Partnership Name** and **Partnership UTR Number** (if applicable)

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

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

23. Answer **No** to the question regarding **Self Billing** as this is not set up for Home Services Suppliers

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

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

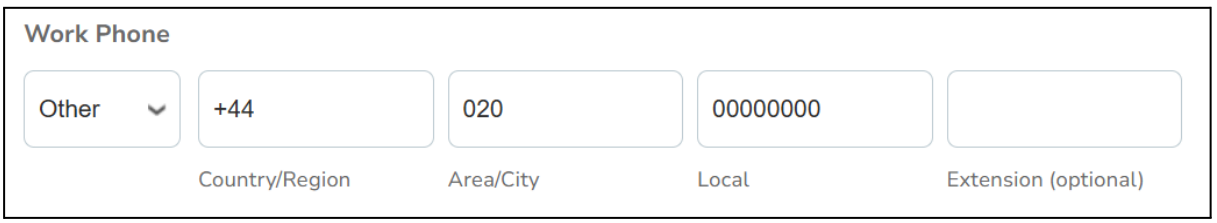
        23.1.2. Tungsten means you will use a Third Party who act as a go-between to prepare and present your invoices to JLP

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

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

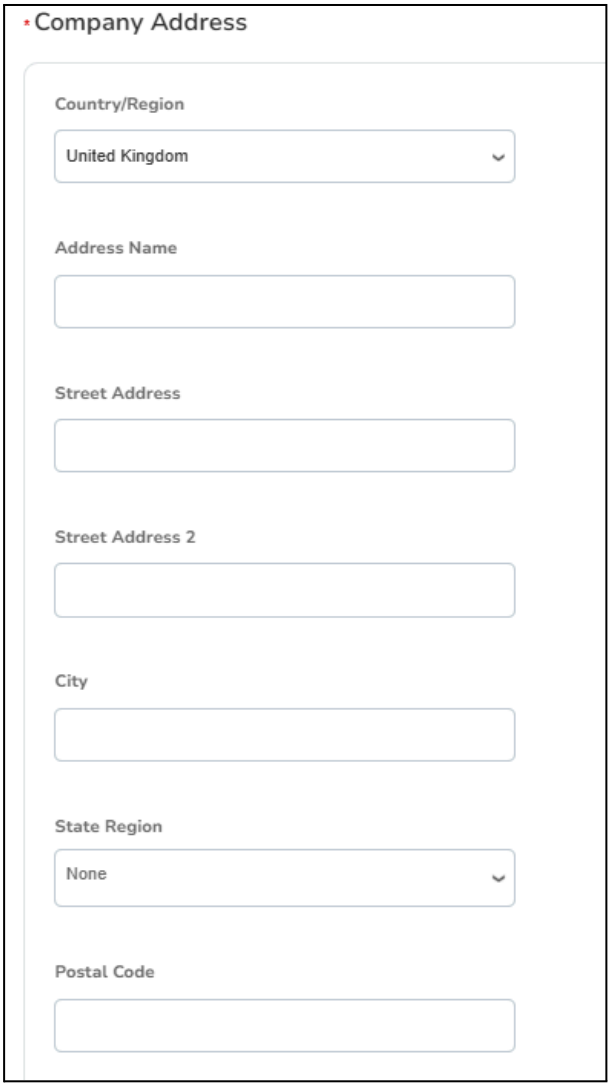
    ***Note**: these certificates are not mandatory to attach, however, if you do not hold a certain certificate, e.g. Asbestos Certificate, after Coupa registration, the Fitter Manager may help you sign up to a course*

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

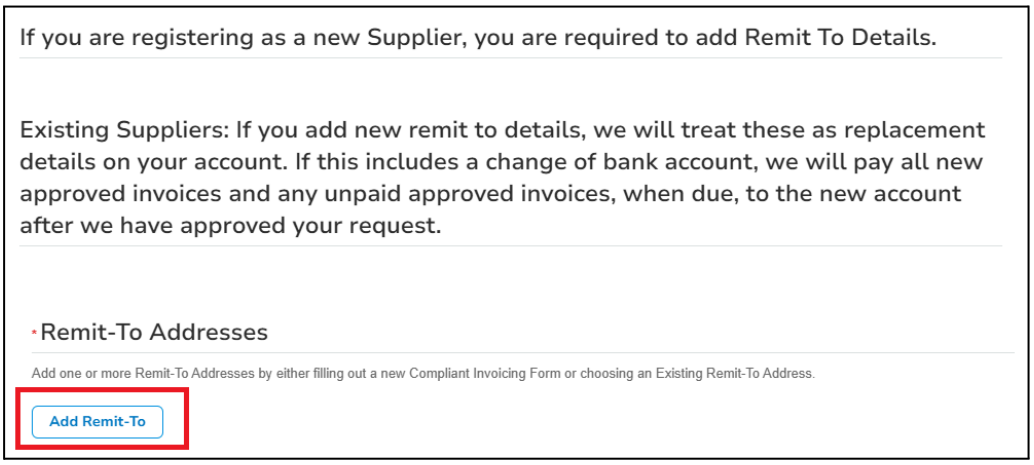


27. Enter an email address which you would like to use to receive **Purchase Orders** from the John Lewis Partnership (JLP)

28. 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

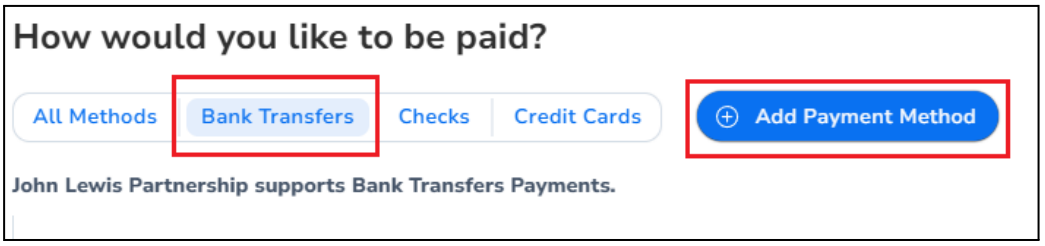


29. In the **Remit-To Addresses** section, click **Add Remit-To**



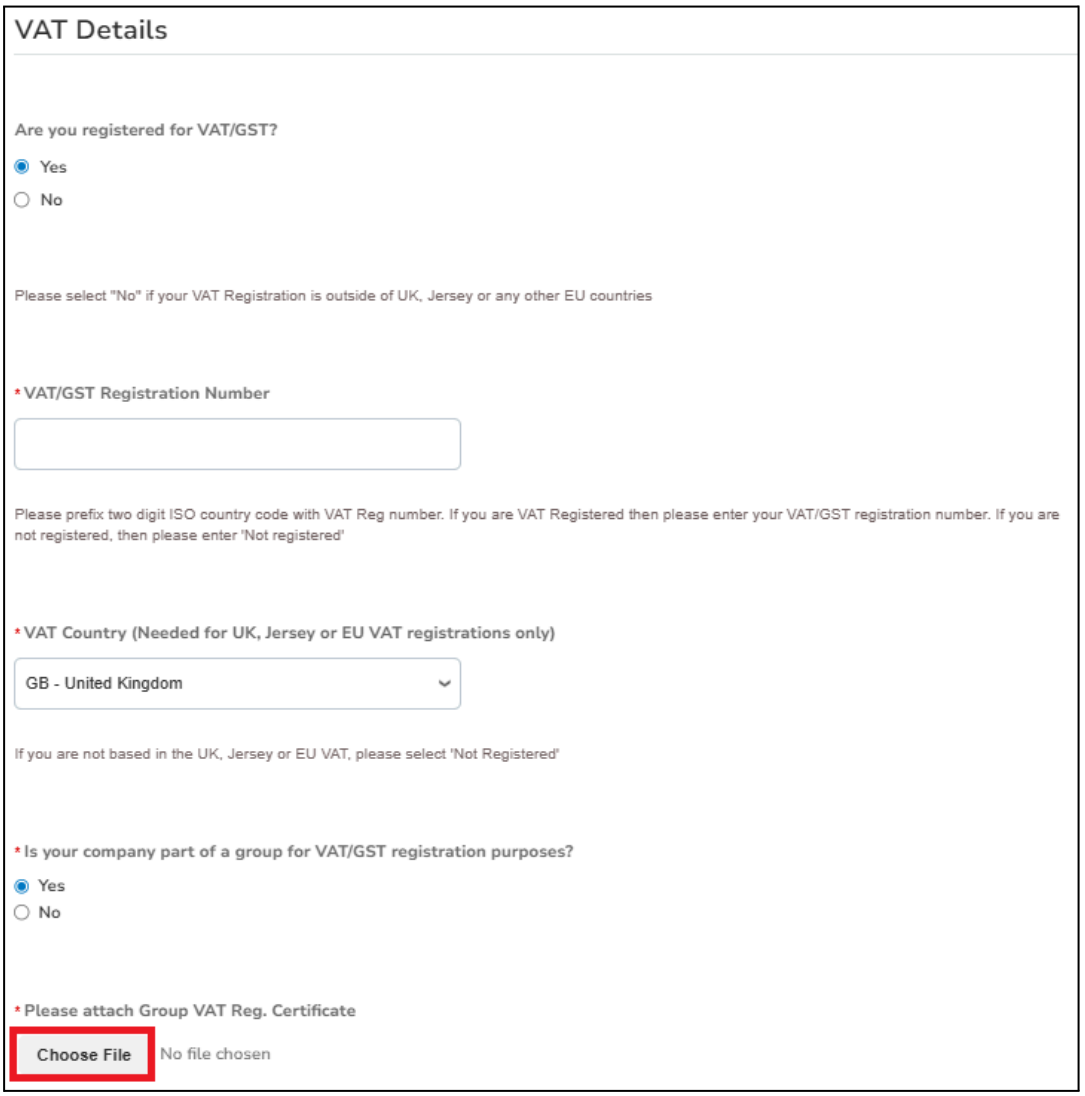
30. In the Remit-To section, select a **Payment Method** or set one up if you do not have a payment method

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



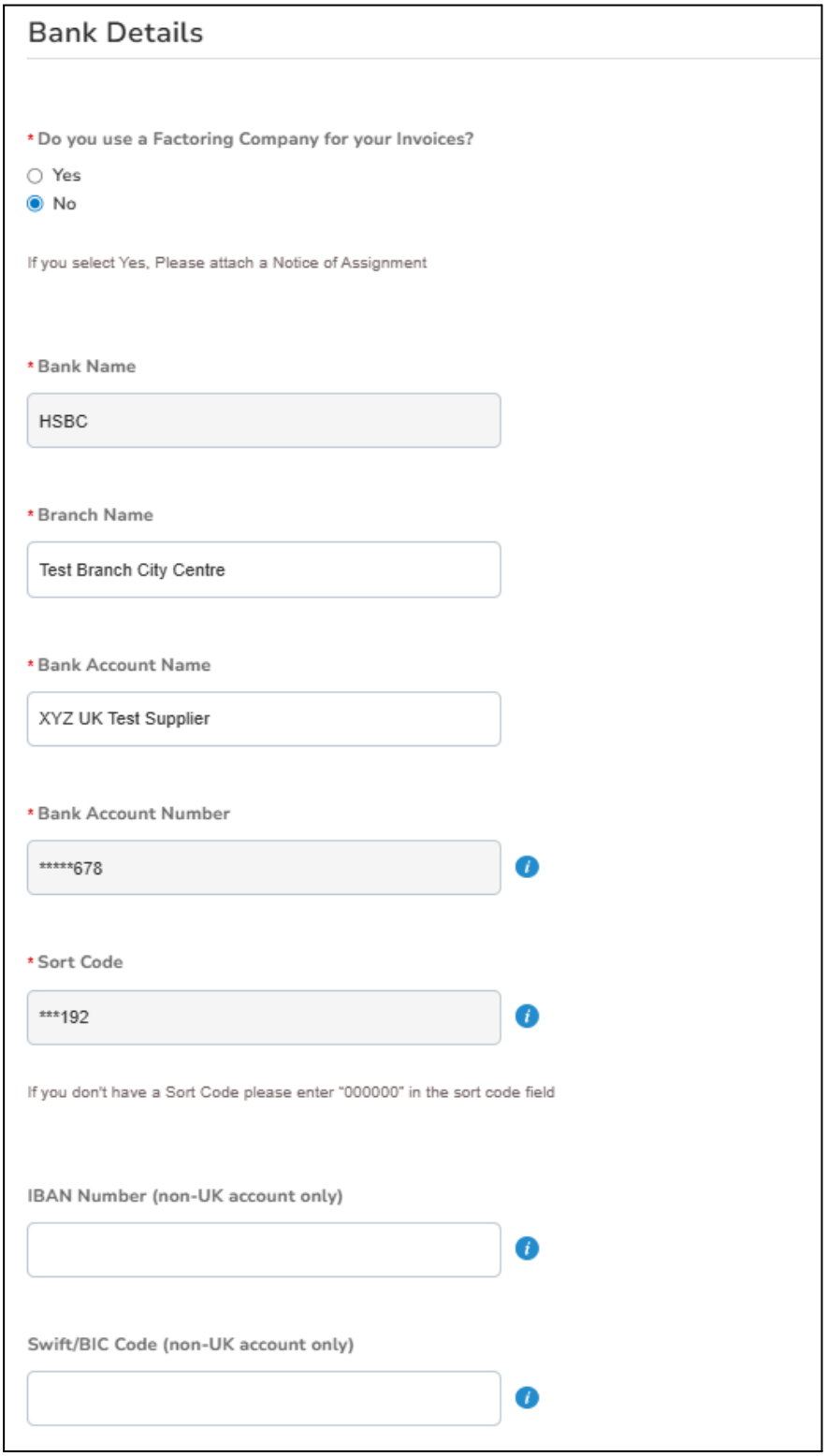
***Note**: Multi Factor Authentication may be required when adding bank details*

31. 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**



32. Enter or add more details of your **Bank Account** (example below)
33. Answer the question on **Factoring**

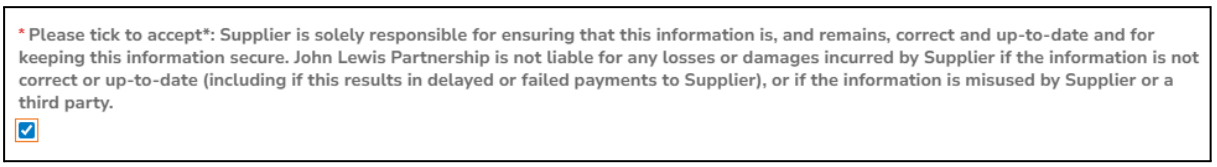
    33.1. If **Yes** is answered then please use the **Choose File** button to attach a copy of your 'Factor Notice of Assignment'



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

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

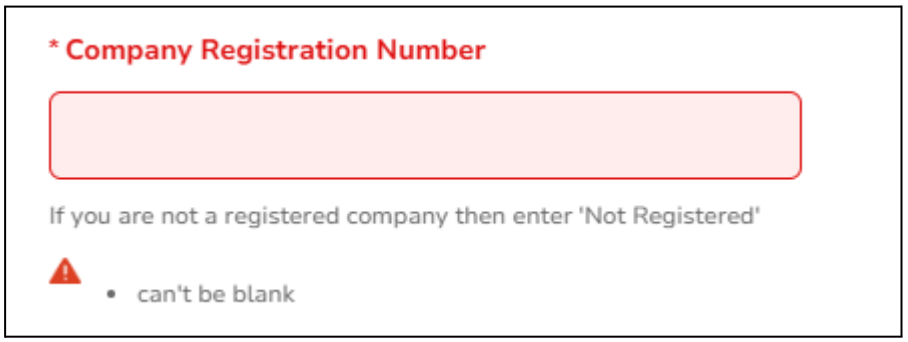
36. **Tick** the box to accept the statement shown below



37. Click **Submit for Approval**

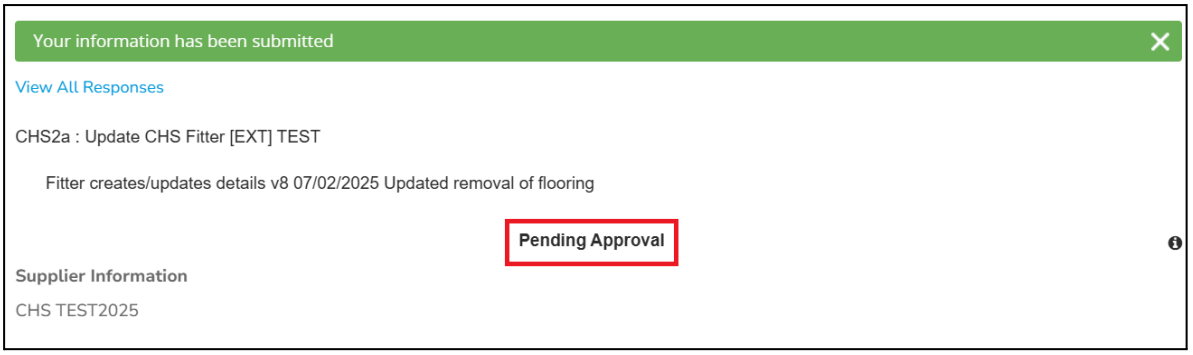
If all fields are completed correctly you will receive a confirmation message (see screenshot in step 39). If, however, one or more of the mandatory fields are missing information you will receive this error message

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



39. 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.**

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.

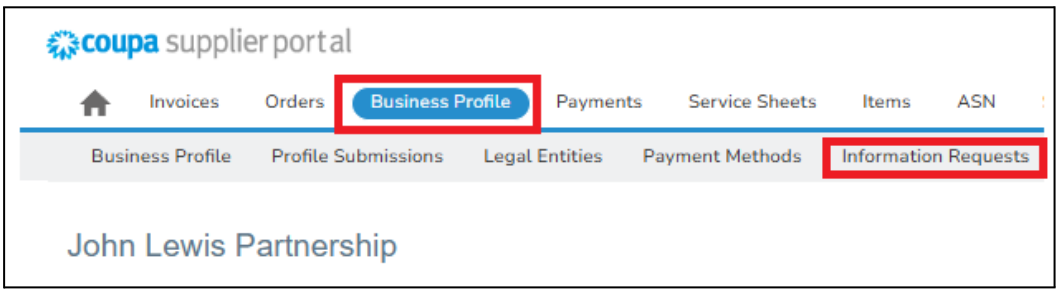
You will also be sent an email to register with Coupa Risk Assess, which is how renewal documentation will be updated such as Public Liability Insurance. On first time use, an email and log in code will be sent to allow you to set up a Password so you can log in and upload documents when prompted.

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