Entering Details of your Organisation into Coupa

For: Suppliers providing a one off service to the John Lewis Partnership and will submit an invoice for payment

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Purpose:

This guide explains how one time Suppliers should enter their details into **Coupa**, which is the system the John Lewis Partnership (JLP) uses to manage processing and payment of invoices. To facilitate payment of your invoice, you will **receive an email** called 'Profile Information Request' which invites you to **register** on Coupa, where you can enter all the details JLP needs to make its payment to you.

Important: Please use this guide to help you work carefully through completing the form in Coupa. Please note also that some questions appear more than once which can seem confusing. Please also ensure that every question marked * is completed as these questions are mandatory and if any are left blank, you won't be able to send the form back to us.

The John Lewis Partnership will only pay one off invoices in **GBP** and to a **UK based bank account**

Note: We recommend that you use the **Google Chrome** web browser to perform the steps described below

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Actions:

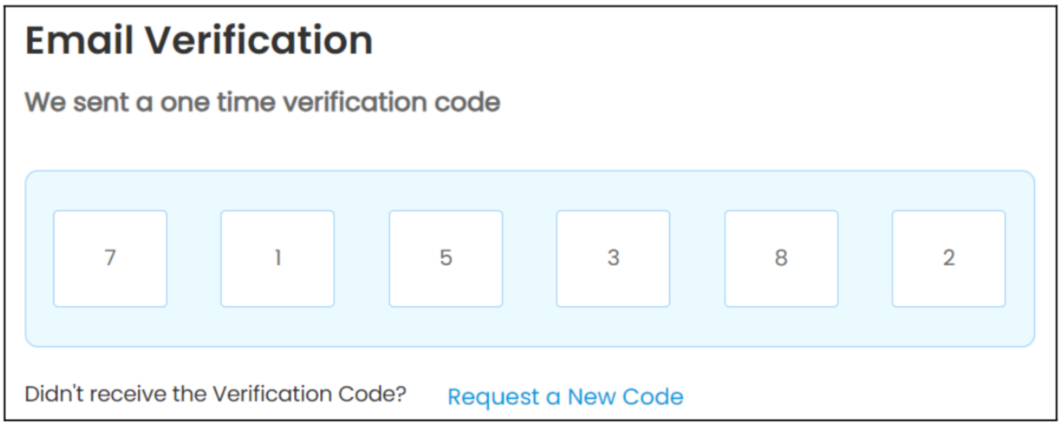
1. On receipt of the email click **Join and Respond**
2. Create a **Password** for yourself and **re-enter** this to **confirm**
3. Select your **Country/Region** - eg United Kingdom
4. Enter your **Tax Registration ID** - eg your VAT number

If you are not tax registered, tick the box ‘I do not have a Tax ID’ and a Reason - eg “Not registered for Tax”

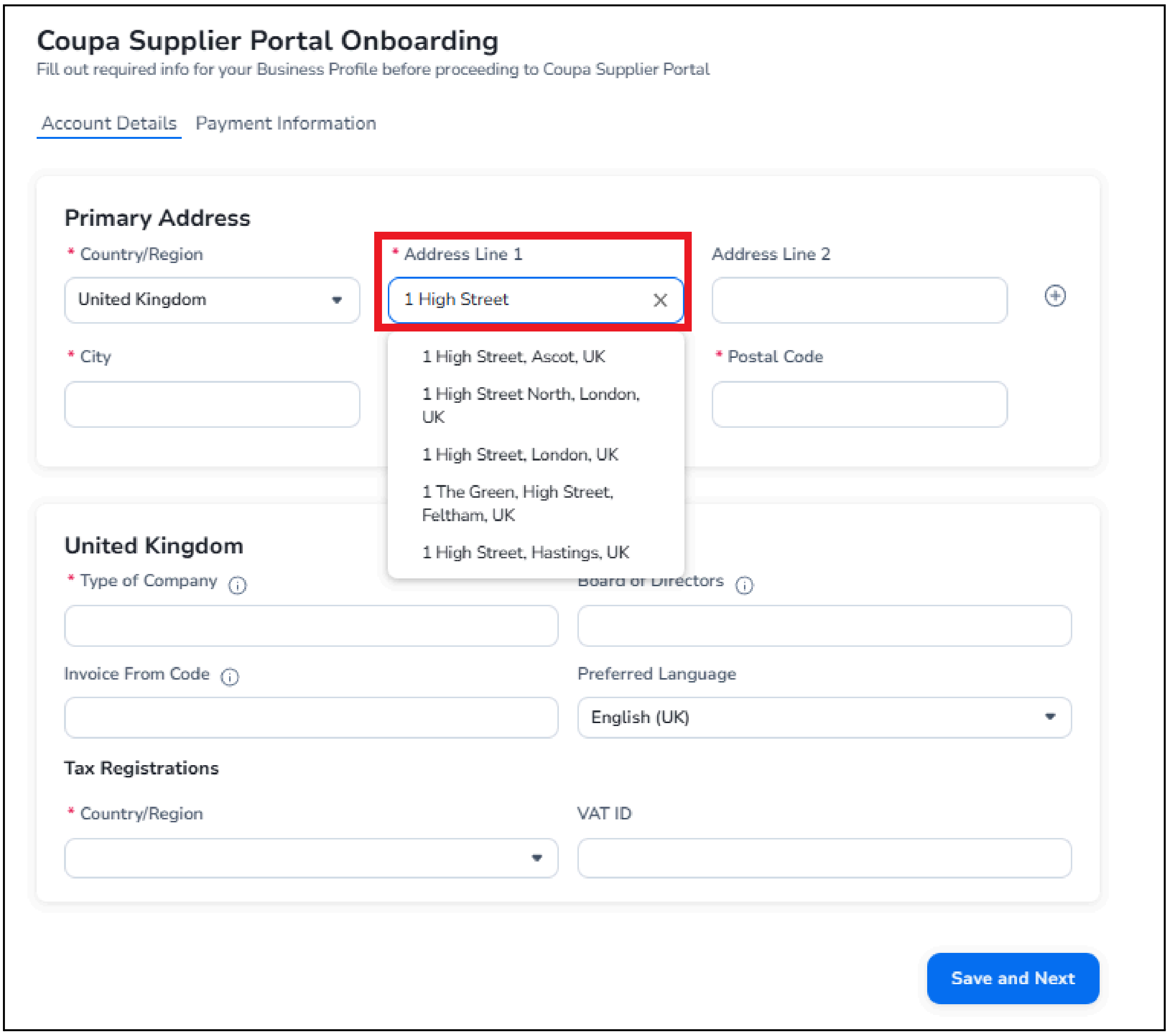
5. **Tick** to accept the **Privacy Policy** and **Terms of Use**
6. Click **Create an Account**

Next you will be asked to verify your email account

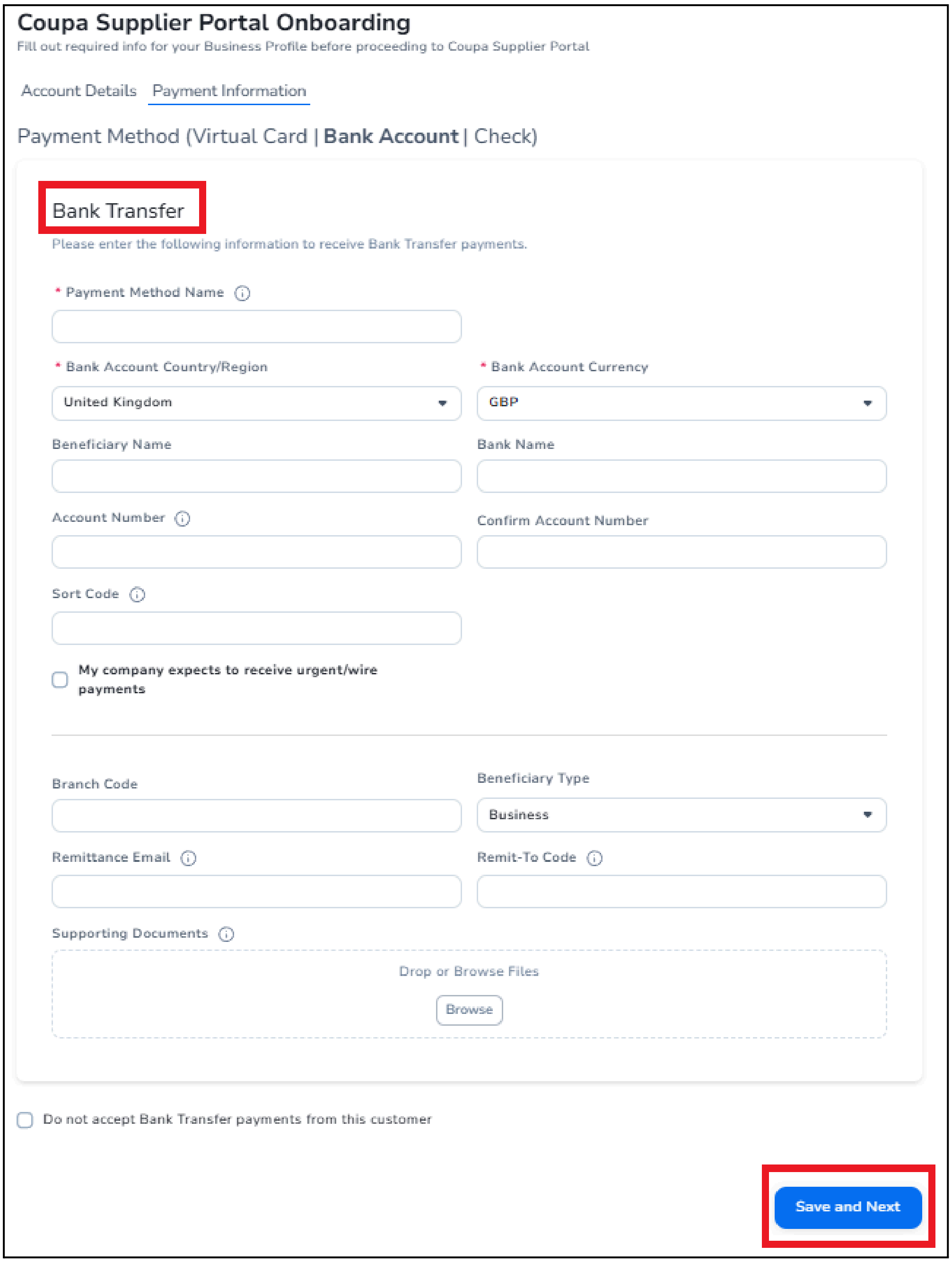
1. Return to your email and make a note of the six digit code email to you from Coupa
2. Enter the code into the boxes as shown below:



3. Click **Next**
4. Complete **Your Contact Info** details as requested
5. Click **Next**
6. 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:



7. Type in your **Type of Company**, confirm your **Country/Region** and **VAT ID** (if applicable) then click **Save and Next**
8. 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**
9. The next payment method is **Bank Transfer,** complete the required fields and click **Save and Next**

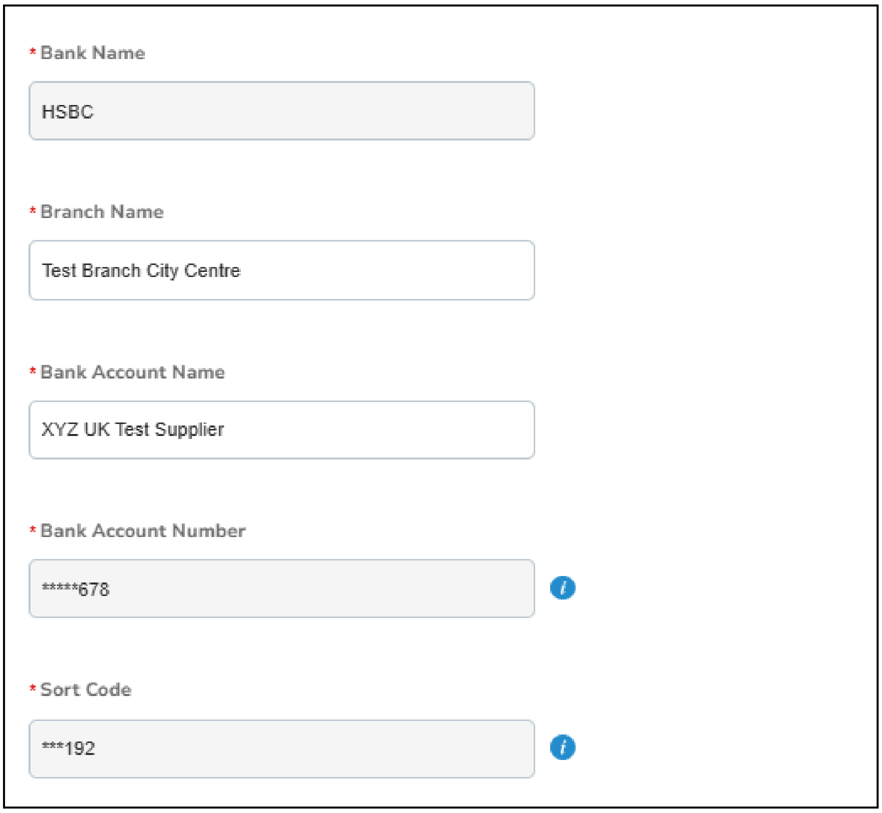


10. The final payment method is **Checks** (Cheques), tick the box that says **'Do not accept Check payments from this customer'** (as this is not this is not enabled in John Lewis Partnership) and click **Save and Next**

11. You will now be taken to the **Form Responses** page and there should be a form called **OTV2a : Update OTV Supplier [EXT] Form,** click on it
12. Enter your Company Registration Number - or enter ‘Not Registered’ if you are not a registered company
13. Next, click the **Add Remit-To** button

14. Select **Bank Transfers** (do **not** select Checks or Credit Cards) and then click **Add Payment Method**
15. In the **Remit-To Addresses** section you can now answer the **VAT Details** questions regarding **VAT** or **GST,** attach **Group VAT Certificate** if **Yes**
16. 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 Code**. JLP will use this information to verify that the payment it makes reaches the correct account safely*



17. Complete any **missing mandatory fields** regarding details of your bank (mandatory fields are marked *)
18. Enter a **Remittance Email Address** where you would like your remittance advice sent to
19. 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

20. **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.

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21. Click **Submit for Approval**

If all fields are completed correctly you will receive a confirmation message (see screenshot in step 23). If, however, one or more of the mandatory fields are missing information you will receive this error message:

Please fix the errors below

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

* Company Registration Number

If you are not a registered company then enter 'Not Registered'

- can't be blank

23. 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?

- On receipt of your submission, the John Lewis Partnership will check and approve the details and raise a payment to you in due course. If we need to contact you, we will do this using the details you have supplied to us in this form

- Please supply the John Lewis or Waitrose Partner who has asked you to complete work for us, with an electronic version of your legal invoice fully detailing the work you carried out. This will be used later in the process to raise our payment to you.

Useful Links:

Link to: [Coupa Supplier Portal]

Link to: [Technical Help Using Coupa]