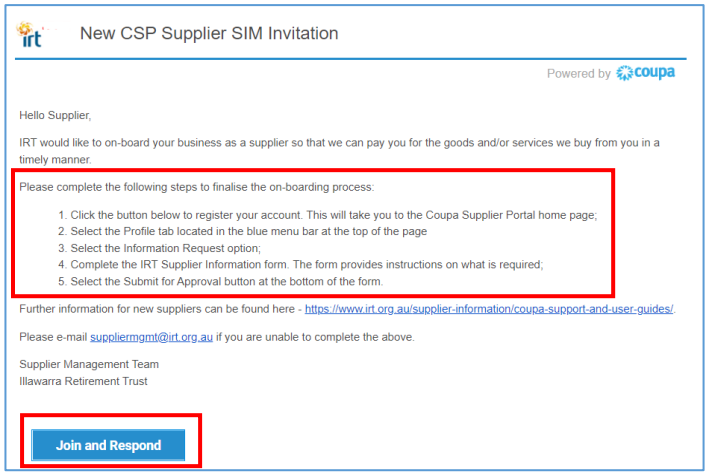
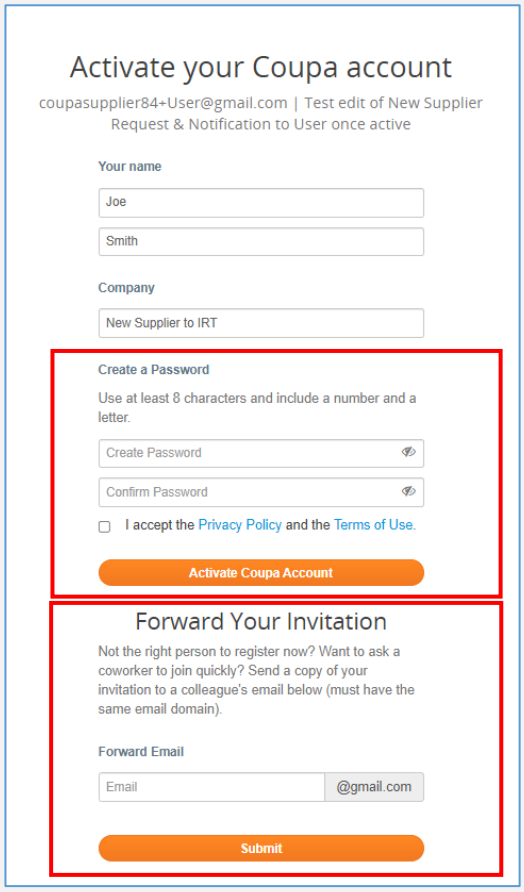
HOW TO COMPLETE THE NEW SUPPLIER PROCESS

(*Increase the zoom to view the screenshots clearly*.)

This guide will step you through how to set up your company in the Coupa Supplier Portal (CSP) to ensure you can transact with IRT.



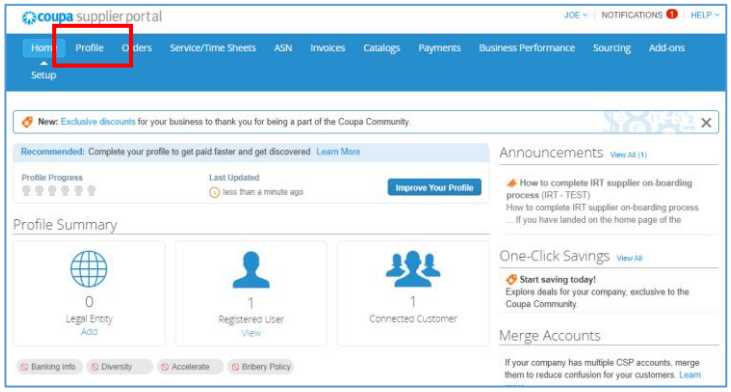
Step 1
Click on the Join and Respond button at the bottom of the e-mail and proceed to step 2.



Step 2

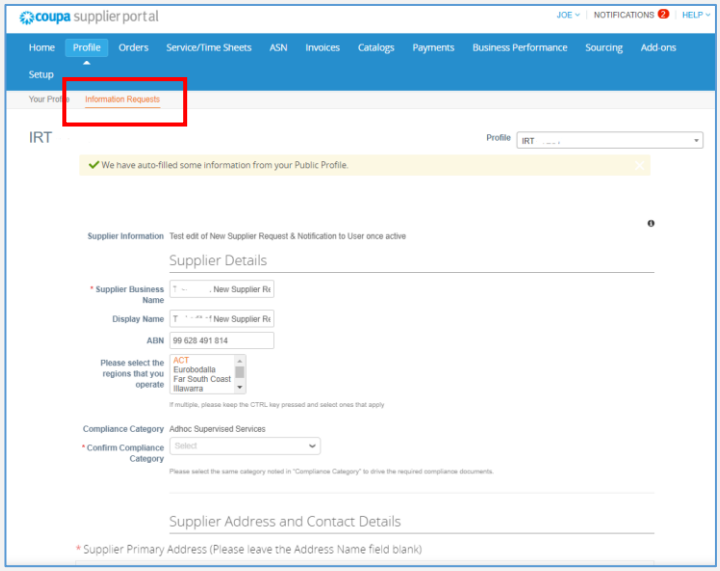
- Create and confirm your password.
- Accept the privacy policy and terms of use.
- Select the Activate Coupa Account button.

If you are not the correct person to register for your company, complete the Forward Your Invitation section instead.



Step 3

- You have now landed on the Coupa Supplier Portal home page.
- **Select profile from the blue banner at the top of the home page.**



Step 4

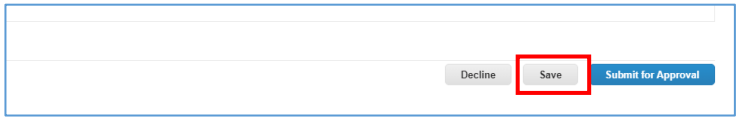
- You must select the option called “Information Requests” to access and complete IRTs supplier on-boarding form.

Step 5

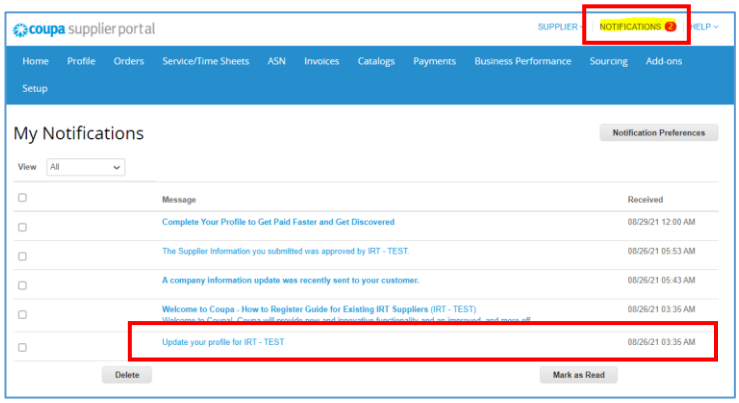
This step is all about confirming your company details such as:

- Address
- Contact numbers
- Bank details
- Purchase order contact details
- Remittance contact details
- Uploading compliance documents such as insurances etc.

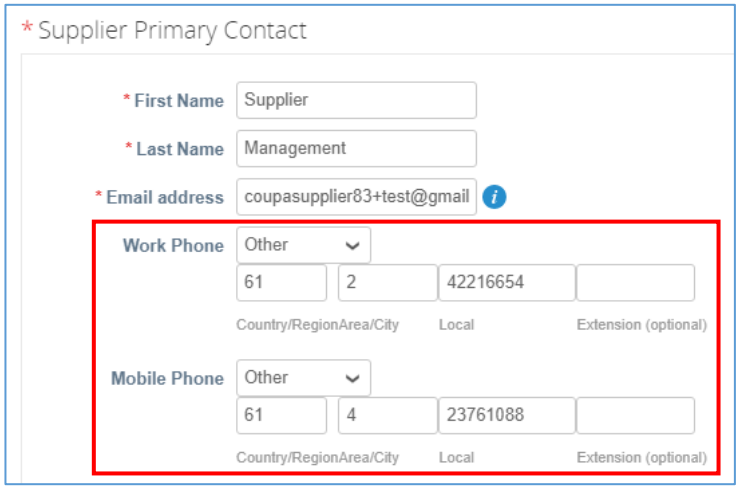
The form contains instructions along the way, so please ensure to read all areas and complete each mandatory field. Also refer to the New Supplier Process Frequently Asked Questions document



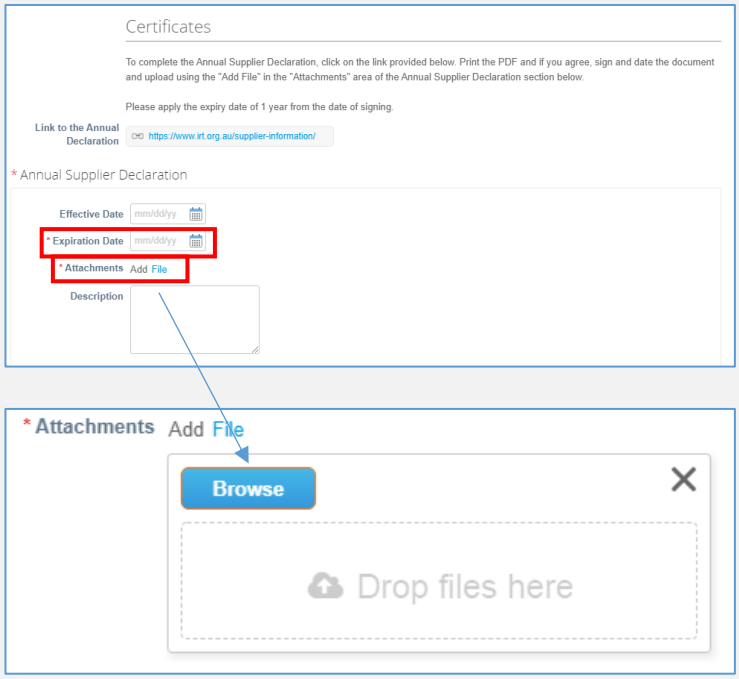
You can use the Save button located at the bottom of the form at any time if you need to complete the form at another time.



To access your form again, you can follow steps 3 and 4 above, or find the form in your notifications in your CSP account.

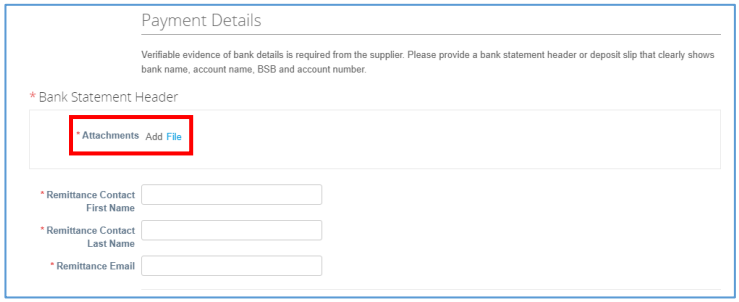


Step 6
This step shows you how to set up your contact numbers in the form.



Step 7
To upload the requested compliance certificates:

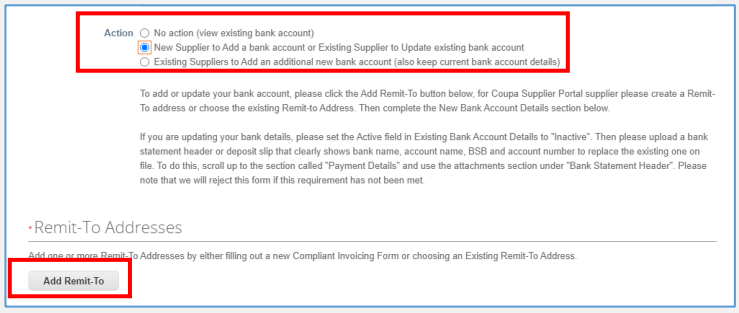
- Ensure to add the expiry date of the certificate.
- Use the blue "File" link to upload the compliance certificate by browsing and selecting or dragging the file where indicated.



Step 8 – Part 1

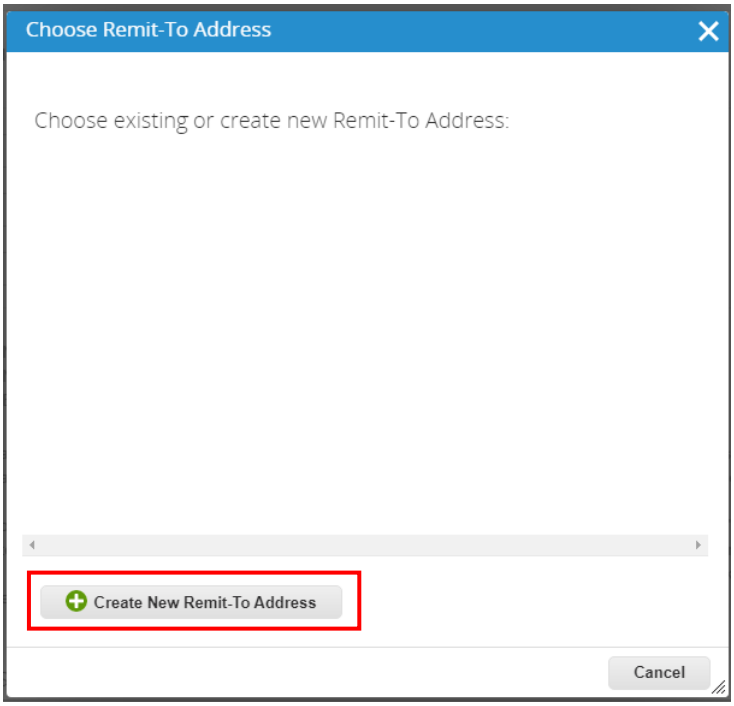
Payment Details section is where you will add your bank details and set up your legal entity to allow electronic invoicing. To do this:

- Attach your bank statement header or deposit slip.
- Complete the remittance information.



Step 8 – Part 2

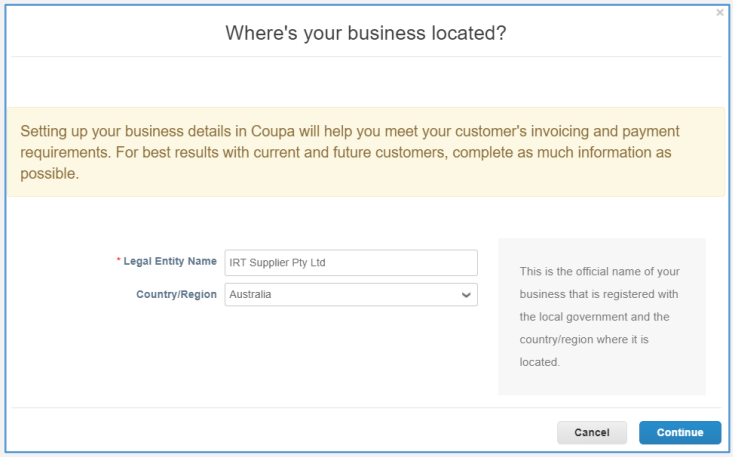
- Under the Action area, select the middle option - New Supplier to Add a bank account option.
- Select the Add Remit To button.



Step 9

The following steps will complete the addition of bank details and legal entity information so you can submit tax compliant invoices via the Coupa Supplier Portal.

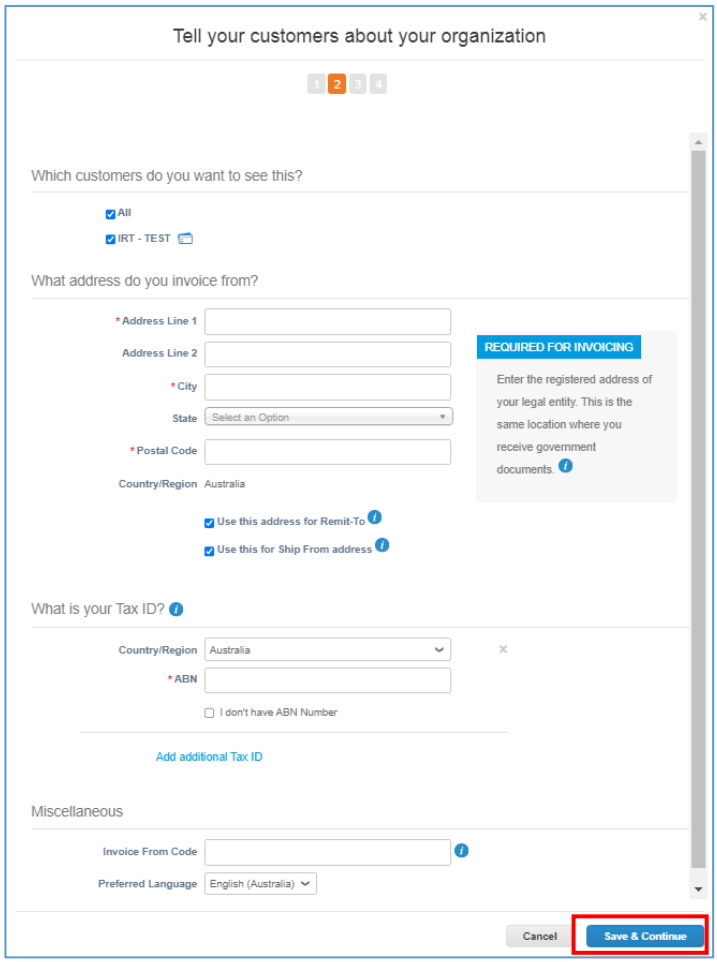
- Select the Create New Remit-To Address.



Step 10

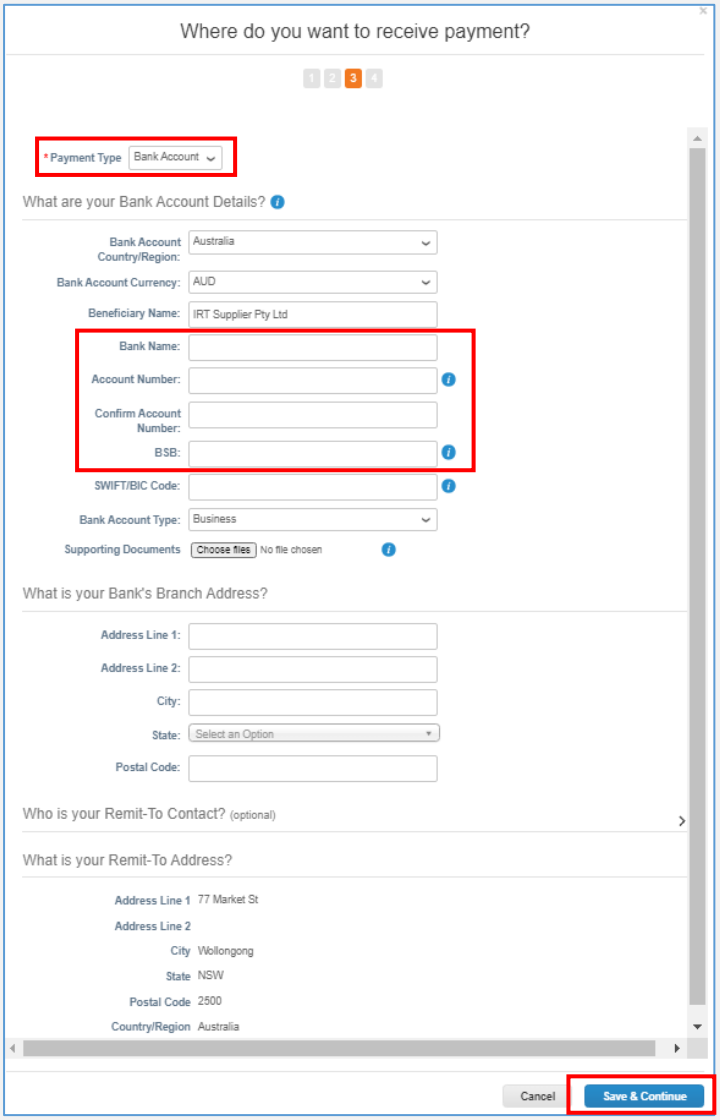
- Enter your legal entity name.
- Ensure the country/region is updated correctly.
- Select Continue.

Your legal entity name is as per the Australian Business Register.



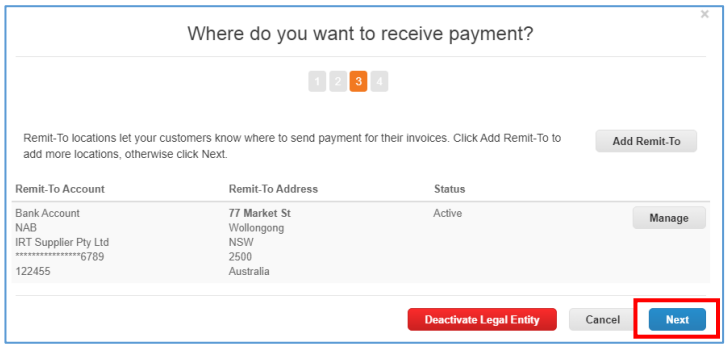
Step 11

- Complete all mandatory requirements on this page as marked with an asterisk.
- You can nominate the visibility level of your profile by leaving the default setting, or by unselecting All, and just selecting IRT.
- Enter your invoicing address.
- Enter your ABN number.
- Select the Save & Continue button located at the bottom right of the page.



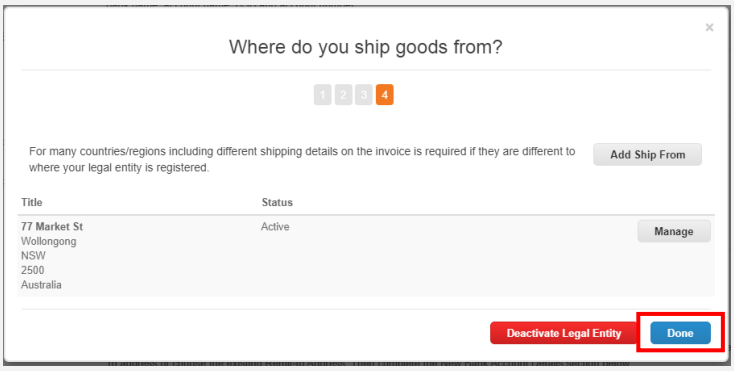
Step 12

- Update the Payment Type to Bank Account.
- Enter your bank details.
- Select the Save & Continue button.



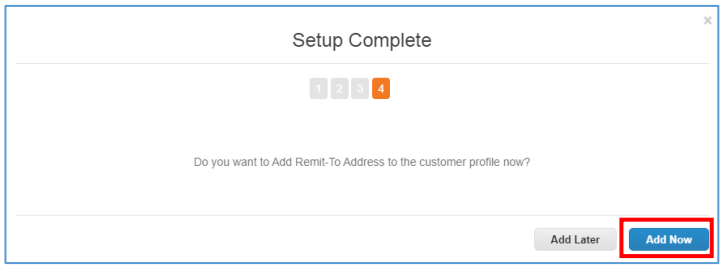
Step 13

- Select the Next button.



Step 14

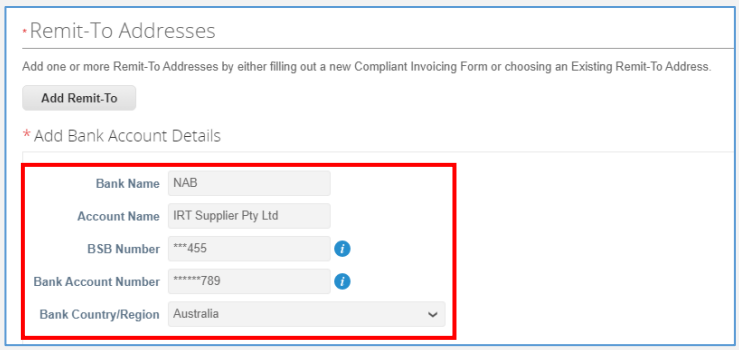
- Select the Done button.



Step 15

The legal entity set up is now complete.

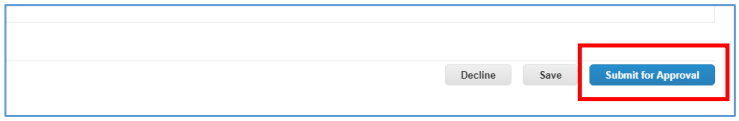
- Select the **Add Now** button.



Step 16

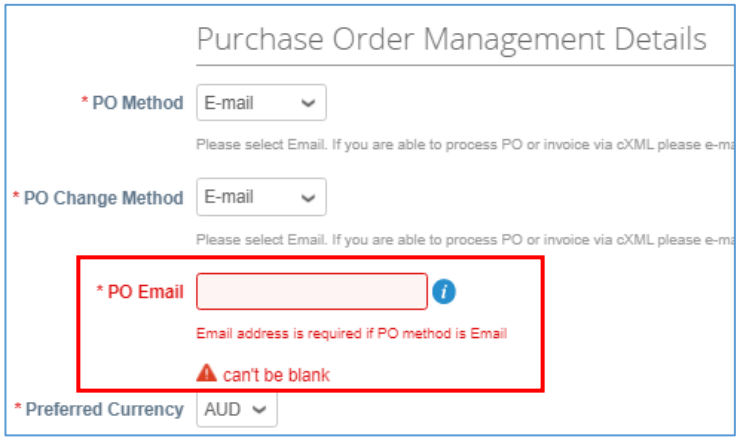
Your bank details should now have updated on IRTs supplier information form.

If they haven't, please enter them.



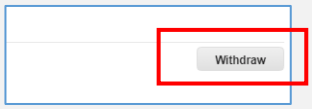
Step 17

Select the Submit for Approval button.



Step 18
If the form does not submit, scroll up to find any errors or missing data. These will be highlighted in red.

Fix any errors or missing data and select the Submit for Approval button again.



Step 19
You will know the form has submitted as a Withdraw button will be visible on the form.

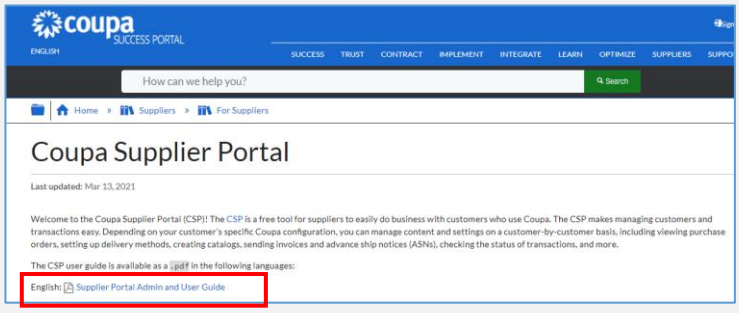
The form will do an ABN check to ensure the ABN provided on the form is valid and will then route to IRT for review and approval.

If the ABN is not valid or has been closed, you will receive a rejection notification. You will need to open the initial form and update the ABN to a valid ABN number.

Step 20
This is all that is required to complete the IRT new supplier process.

Once IRT have finalised setting up your company information in Coupa, you will receive a notification as shown in the screenshot.

IRT can then begin issuing purchase orders as required.



Step 21
Coupa provides an extensive Coupa Supplier Portal (CSP) user guide for suppliers.

The document can be found at the following link - Coupa Supplier Portal Admin and User Guide , along with other information about the CSP.