



## HOW TO COMPLETE THE ON-BOARDING PROCESS FOR NEW SUPPLIERS

(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.

We recommend completing this process on a laptop or PC for a better experience. Using a mobile phone limits the page views and some of the links in the form may not work.

### Part 1 – Creating your Coupa Supplier Portal Account

*This part of the on-boarding process should only take a minute*

**irt**

### New IRT Supplier On-boarding Request

Hello Supplier,

IRT Test uses Coupa to on-board suppliers we want to buy from, transmit our purchase orders and process invoices. IRT would like to on-board your business as a supplier and completing this process ensures IRT can pay you more securely and efficiently.

Please complete the following steps to finalise the on-boarding process.

1. Click the button below to register your account.
2. Follow the pop up prompts that appear when you log in
3. Once the pop up sections are completed, you will automatically be taken to IRT's onboarding form for IRT specific requirements. Complete all sections of the on-boarding form. The form provides instructions on what is required.
4. Select the Submit for Approval button at the bottom of the form.

Supplier Management  
Illawarra Retirement Trust

**Join and Respond**

#### Step 1

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

### Create an Account

Illawarra Retirement Trust is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Illawarra Retirement Trust so you're ready to do business together.

**Business Name**  
New Supplier Pty Ltd  
Your legal business name (or legal personal name if an individual)

**Email**  
coupasupplier83+5555@gmail.com

**First Name** Harry **Last Name** Potter

**Password** **Confirm Password**

Use at least 8 characters and include a number and a letter.

I accept the [Privacy Policy](#) and the [Terms of Use](#)

#### Step 2

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

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



# COUPA SUPPLIERS

## QUICK REFERENCE GUIDE

### Email Verification

We sent a one-time verification code to [coupasupplier84+irttest@gmail.com](mailto:coupasupplier84+irttest@gmail.com)

Didn't receive the Verification Code? [Request a New Code](#)

Next

### Step 3

Enter the code you have received to your email address.

Select the "Next" button.



Verify your email for Coupa Supplier Portal

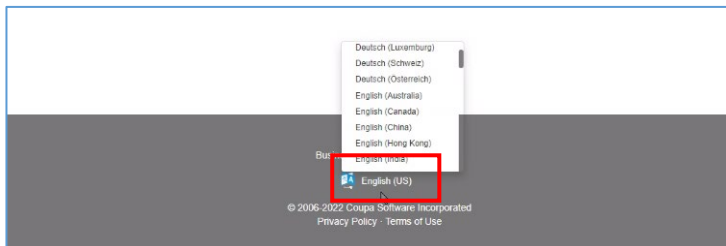
Below is the Security Code necessary to verify your email.

**567736**

If you did not make this request, you can ignore this email.



The email will look like this.



### Step 4

Scroll to the English (US) setting at the bottom of the page and change it to English (Australia) if not already displaying as English (Australia).

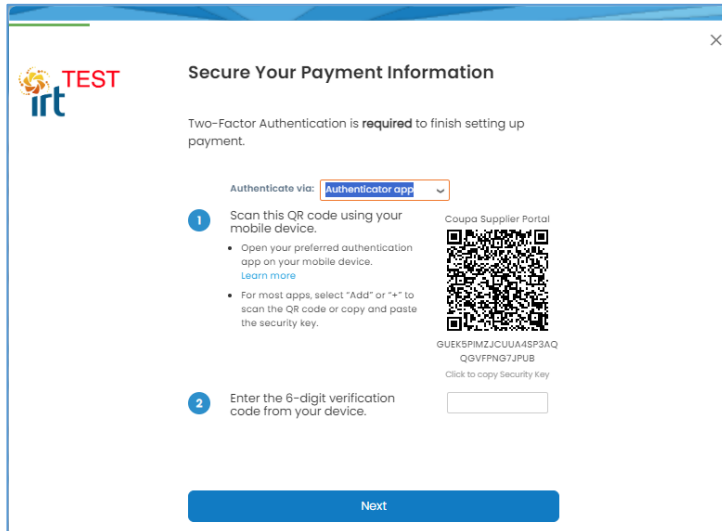
## Part 2 – General Coupa Supplier Portal Requirements

*This part of the on-boarding process should only take 5 minutes*



# COUPA SUPPLIERS

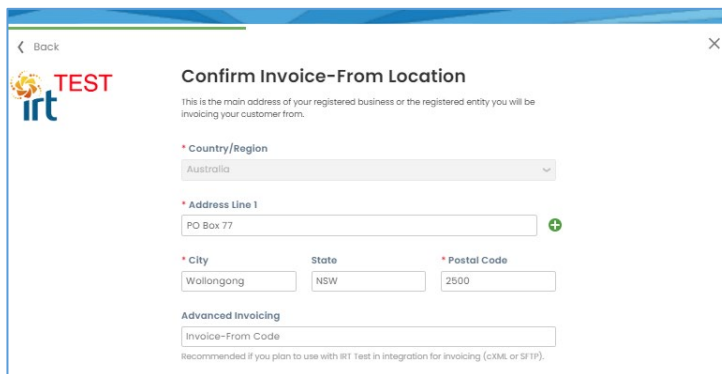
## QUICK REFERENCE GUIDE



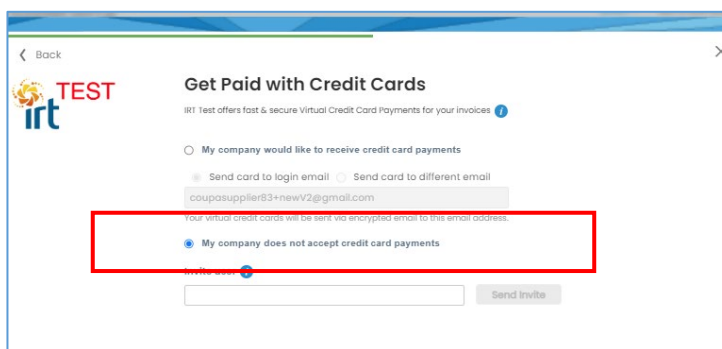
### Step 5

Once you land on the Coupa home page you will receive a series of pop up prompts. Complete each pop up with your company information that applies to IRT.

This is a guided process, so each time you complete one pop up screen, just select the next button to proceed to the next pop up.



When you arrive at the “Confirm Invoice-From Location, Confirm Pay-To Location and Confirm Ship-From Location pop ups, it is important to complete these as they will become your remit to information for any invoices you submit via the portal, ensuring you are submitting a tax compliant invoice.



When you arrive at the “Get Paid with Credit Cards” pop up, please select the option “My Company does not accept credit card payments” as IRT currently only pays via EFT.

You can invite additional users from your company on any of the screens if you need to.

**It is important that you complete all the pop up screens to ensure you can complete the next part of the on-boarding process which is IRT’s specific requirements.**



# COUPA SUPPLIERS

## QUICK REFERENCE GUIDE

The screenshot shows a mobile-style pop-up window with a white background. At the top left is a back arrow and the text 'Back'. At the top right is a close 'X' icon. Below the back arrow is the 'irt' logo. The main heading is 'IRT Test requires some additional information' in bold. Below the heading is a smaller line of text: 'This information must be provided before you can do business with IRT Test.' At the bottom of the pop-up, there are two buttons: a blue button with the text 'Take Me There' and a smaller, lighter blue button with the text 'Skip for Now'. A red rectangular box highlights the 'Take Me There' button.

### Step 6

The last pop up will request you to complete some additional information, this is the IRT specific requirements, please select the "Take Me There" button



## Part 3 – IRT Specific On-boarding Requirements

*This part of the on-boarding process should only take 10 minutes*

IRT SUPPLIER ON-BOARDING

Welcome to IRT's Supplier On-boarding Process.  
This on-boarding form is made up of 6 sections with instructions provided along the way. IRT requests this information so that we can issue purchase orders and pay your invoices. It should only require 15 minutes of your time to complete.

If you require assistance with this form, click [here](#) to access IRT's step by step user guide.

**SECTION 1 - Business Details**

\* Business Name

Display Name

*The Display Name should be the name that appears on your invoice.*

ABN

Select the regions you supply to

Click in the box to access the options in a drop down

coupa supplier portal BUDDY ~ NOTIFICATIONS HELP ~

Home **Profile** Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

Your Profile **Information Requests** Performance Evaluation Subscriptions

**Step 7**  
There are 6 sections to IRT's on-boarding form that will need to be completed.

There are instructions provided in the form.

Use the Save button located at the bottom of the form at any time if you need to complete the form at a later time.

To access your form again, select the Profile tab, then select "Information Requests".



Supplier Primary Contact

\* First name  
Harry

\* Surname  
Potter

\* Email address  
coupasupplier83+5555@gmail.com

**Work Phone**

Other	61	2	42216654	
Country/Region	Area/City	Local	Extension (optional)	

**Mobile Phone**

Other	61	4	23761088	
Country/Region	Area/City	Local	Extension (optional)	

### Step 8

This step shows you how to set up your contact numbers correctly in Section 2 – Supplier Address and Contact Information.

**SECTION 4 - Compliance Certificates**

IRT requests certain compliance certificates based on the types of goods and services defined in your compliance category. The certificates required from you are listed below.

Your compliance category  
Adhoc Supervised Services

\* Re-select the compliance category listed above

Adhoc Supervised Services x v

Examples include entertainers, meeting engagements only (where no unsupervised contact is anticipated).

**Annual Supplier Declaration**

To complete the Annual Supplier Declaration, click the link provided below. You will be taken to a document where you agree, sign and date the document. Return to this tab and upload it using the "Add File" link below this text. Expiry date is one year from the date of signing.

[Click here to access the Annual Supplier Declaration](#)

\* upload your signed declaration here

Effective Date  
mm/dd/yy

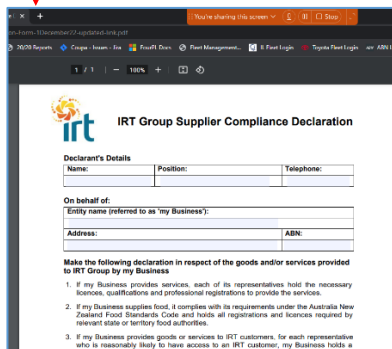
\* Expiration Date  
mm/dd/yy

\* Attachments  
Add File

### Step 9

This step shows you how to complete Section 4 – Compliance Certificates

- Ensure you select the compliance category from the drop down that matches the one above. This determines the compliance documents that IRT requires from you.
- To complete the annual supplier declaration, click the link to access the declaration, it will open in a new browser tab.
- You will need to add the expiry date of each certificate you upload.
- Use the blue "File" link to upload the compliance certificate by browsing and selecting or dragging the file.



IRT Group Supplier Compliance Declaration

Declarant's Details

Name:	Position:	Telephone:

On behalf of:

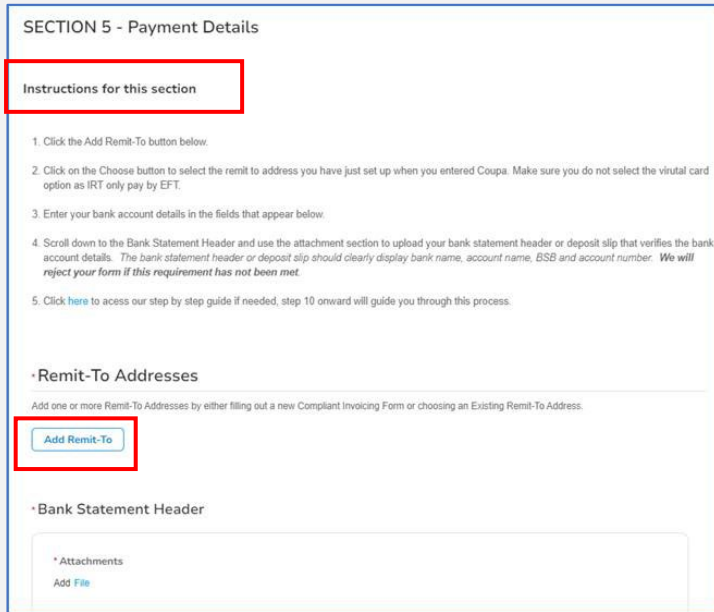
Entity name (referred to as 'my Business'):	
Address:	ABN:

Make the following declaration in respect of the goods and/or services provided to IRT Group by my Business

1. If my Business provides services, each of its representatives hold the necessary licences, qualifications and professional registrations to provide the services.
2. If my Business supplies food, it complies with its requirements under the Australia New Zealand Food Standards Code and holds all registrations and licences required by relevant state or territory food authorities.
3. If my Business provides goods or services to IRT customers, for each representative who is reasonably likely to have access to an IRT customer, my Business holds a valid licence or registration to supply those goods or services to IRT customers.

Fill in the required fields in the declaration, sign and date it and save it as a file on your device.

You can then go back to the Coupa Supplier Portal tab and upload it into the Attachments area as shown in the screenshots above.



SECTION 5 - Payment Details

**Instructions for this section**

1. Click the Add Remit-To button below.
2. Click on the Choose button to select the remit to address you have just set up when you entered Coupa. Make sure you do not select the virtual card option as IRT only pay by EFT.
3. Enter your bank account details in the fields that appear below.
4. Scroll down to the Bank Statement Header and use the attachment section to upload your bank statement header or deposit slip that verifies the bank account details. The bank statement header or deposit slip should clearly display bank name, account name, BSB and account number. We will reject your form if this requirement has not been met.
5. Click [here](#) to access our step by step guide if needed, step 10 onward will guide you through this process.

·Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

**Add Remit-To**

·Bank Statement Header

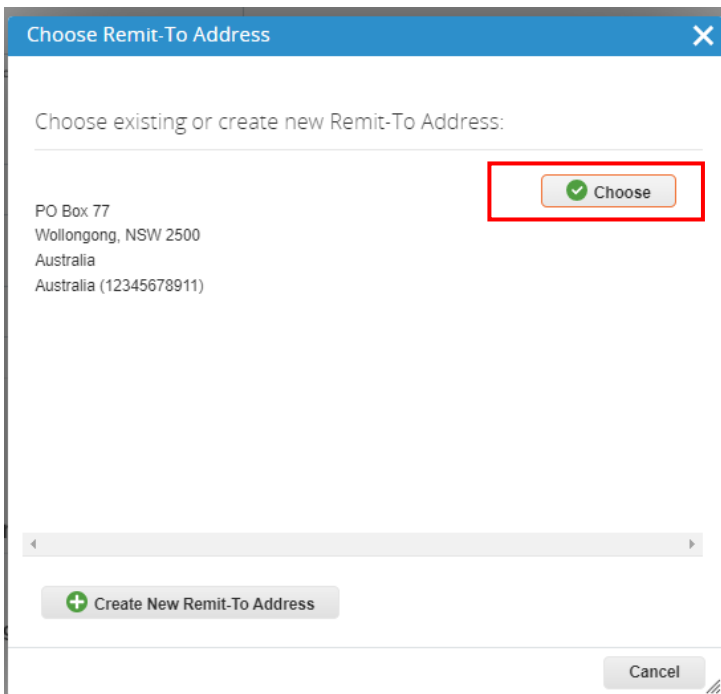
\* Attachments  
Add File

### Step 10

Steps 10 to 18 cover the requirements of Section 5 - Payment Details.

This is where you will add your remittance information that you set up in part 2 and your bank account details by selecting the “Add Remit To” button

*Detailed instructions are included in the form called “Instructions for adding your bank details”.*



Choose Remit-To Address

Choose existing or create new Remit-To Address:

PO Box 77  
Wollongong, NSW 2500  
Australia  
Australia (12345678911)

**Choose**

+ Create New Remit-To Address

Cancel

### Step 11

After selecting the Add Remit To button mentioned in step 10, you will land on this screen.

Select the Choose button to select the remit to address you created in part 2 of this process. Note if you did complete the “Get Paid by Credit Cards” options, this will also appear in this field, please ensure you select the other option as IRT do not currently pay by credit card.

*If there is nothing to select, you will need to select the option “Create New Remit To Address” and follow the prompts.*



**\* Bank Account Details**


**\* Bank Name**


**\* Account Name**

**\* BSB Number**

**\* Bank Account Number**

**Bank Country/Region**

### Step 12

You will land back in the onboarding form, scroll down until you get to the “Bank Account Details” and complete all required fields.

**\* Bank Statement Header**

**\* Attachments**

[Add File](#)

Verifiable evidence of your bank account details is required. Upload a bank statement header or deposit slip that clearly shows bank name, account name, BSB and account number.

### Step 13

Attach a bank statement header or deposit slip that verifies your bank details. This document must clearly show bank name, account name, BSB and account number.

**SECTION 6 - Invoice Submission**

IRTs preferred method of invoicing is via your Coupa Supplier Portal (CSP) account.

Once the on-boarding process has been finalised, you will receive an email that confirms this and provides you with information on how to submit your invoice via the Coupa Supplier Portal.

\* Tick to confirm you understand IRTs preferred invoicing method

Decline Save **Submit for Approval**

### Step 14

Verify you understand IRTs preferred invoicing method and submit for approval.

**Purchase Order Management Details**

\* PO Method E-mail

Please select Email. If you are able to process PO or invoice via cXML please e-m

\* PO Change Method E-mail

Please select Email. If you are able to process PO or invoice via cXML please e-m

\* PO Email  i

Email address is required if PO method is Email

! can't be blank

### Step 15

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.

**Withdraw**

### Step 16

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.

**My Notifications** Notification Preferences

View All

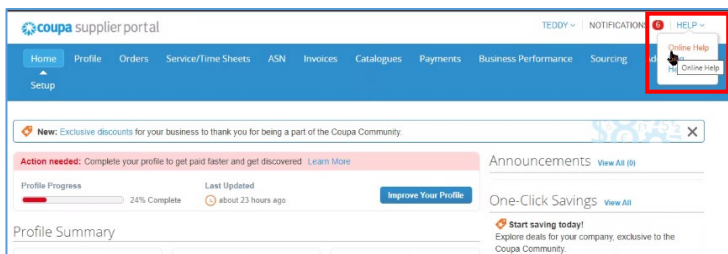
<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	The Supplier Information you submitted was approved by IRT	08/25/21 05:53 AM

### Step 17

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 and you will also receive a confirmation email from [suppliermgmt@irt.org.au](mailto:suppliermgmt@irt.org.au).

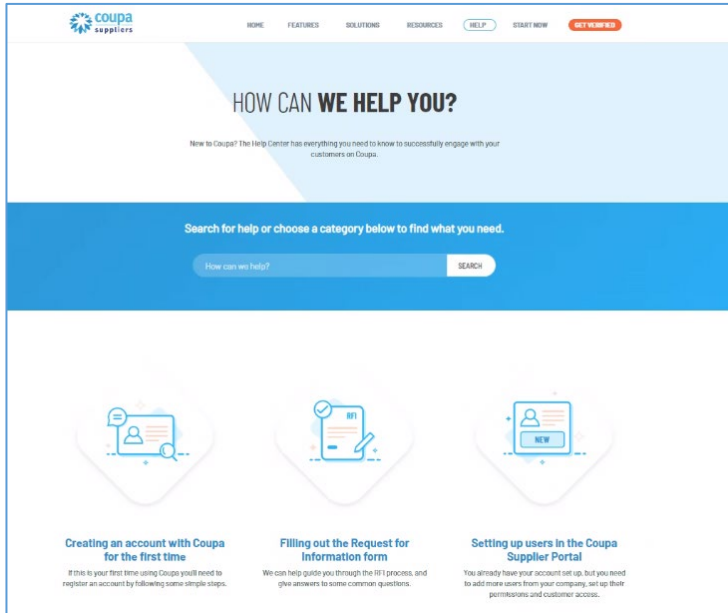
IRT can then begin issuing purchase orders as required.



### Step 18

Coupa provides help for suppliers using the CSP.

To access help, click on the HELP drop down at top right of the home page and select Online Help.



This will take you to a new tab in your browser where you can access more information about invoicing, purchase orders, adding users etc.