How to Complete IRT's On-boarding Process for New Suppliers

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

Use this guide to set up your company in the Coupa Supplier Portal (CSP) so you can transact with IRT.

Follow Steps 1–12 to create your account, complete basic setup, submit the IRT form and add a payment method.

Refer to Helpful tips, What happens next and Need help? for additional guidance.

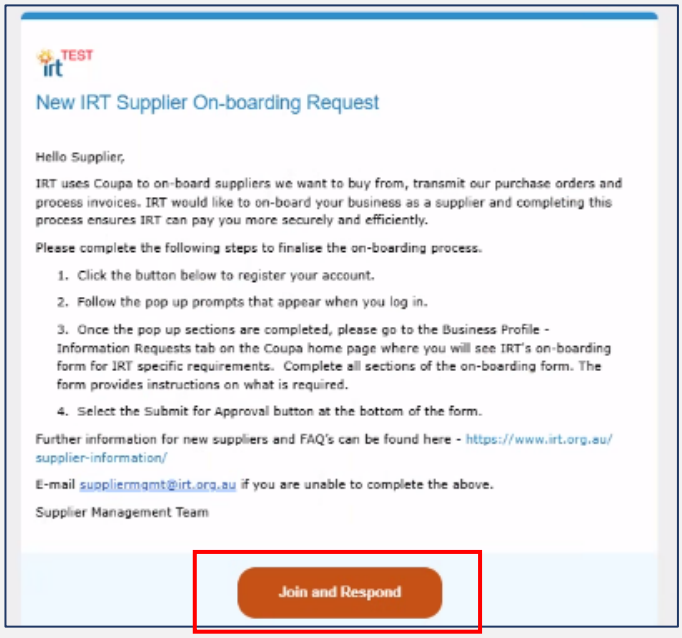
Before You Start

- Use a **laptop or desktop computer** (mobile may not work properly)
- Have ready:
  - Your **ABN**
  - **Bank details**
  - Any **compliance documents** such as insurances etc

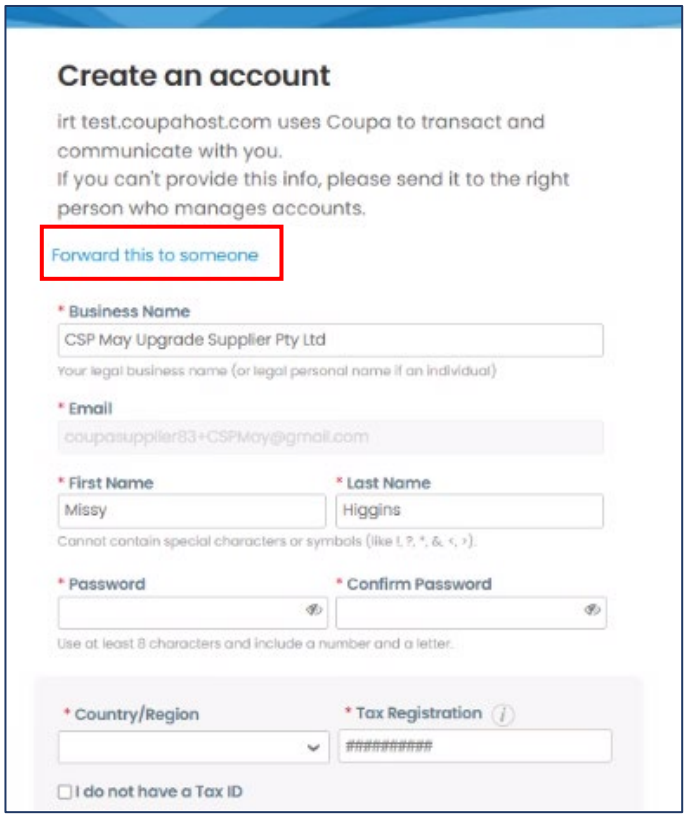
What's in this guide

1. Create your account (1 min)
2. Basic setup (2 mins)
3. Complete the IRT form (10 mins)
4. Add a Payment Method
5. Helpful tips
6. What happens next
7. Need help?

Create your account (1 minute)



Step 1
Open the email from IRT and click **Join and Respond**

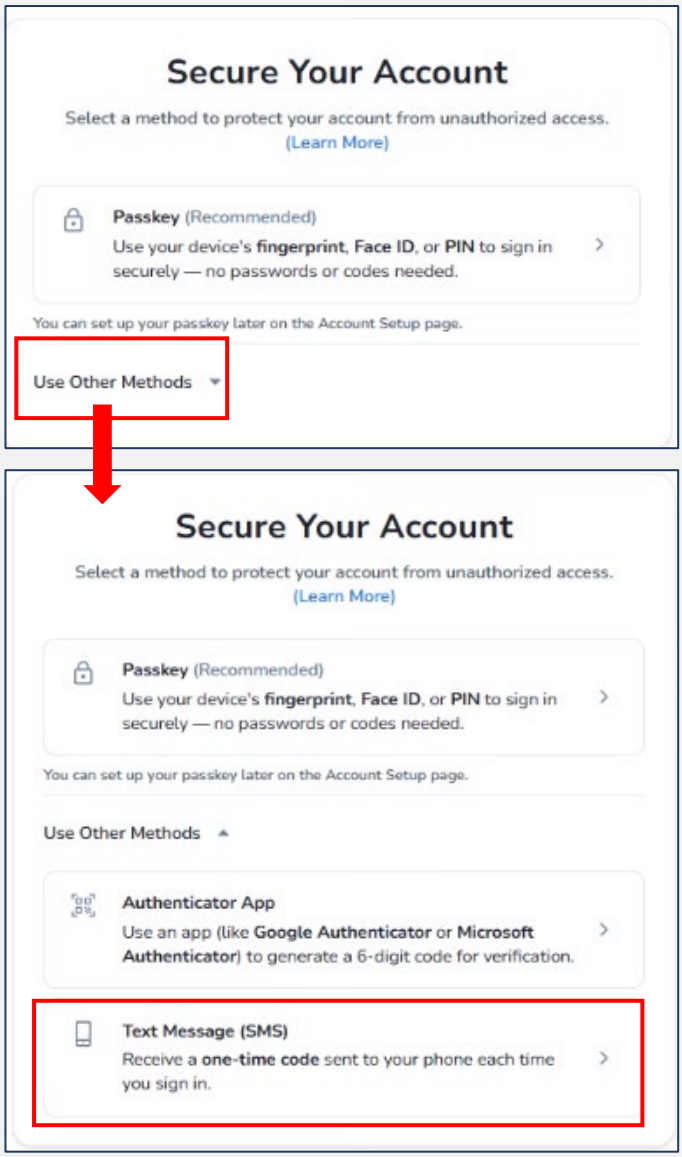


Step 2
Enter:

- Password**.**
- Country**: Australia.**
- Your **ABN.**

Accept terms and click **Create Account.**

Not the right person? Use **Forward this to someone.**

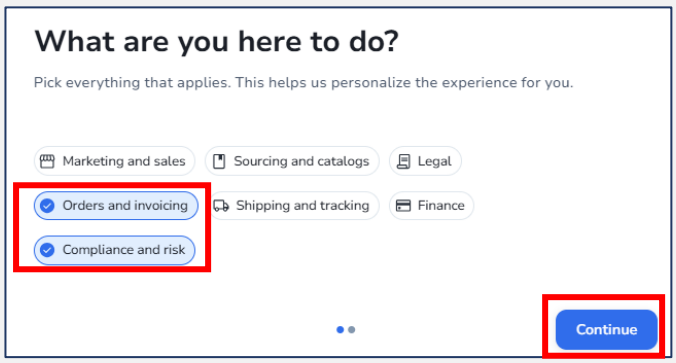


Step 3
Set up multi-factor authentication

Choose **Passkey**, or select **Use Other Methods** if you prefer text-message authentication.

Proceed to the next page

Basic setup (2 minutes)



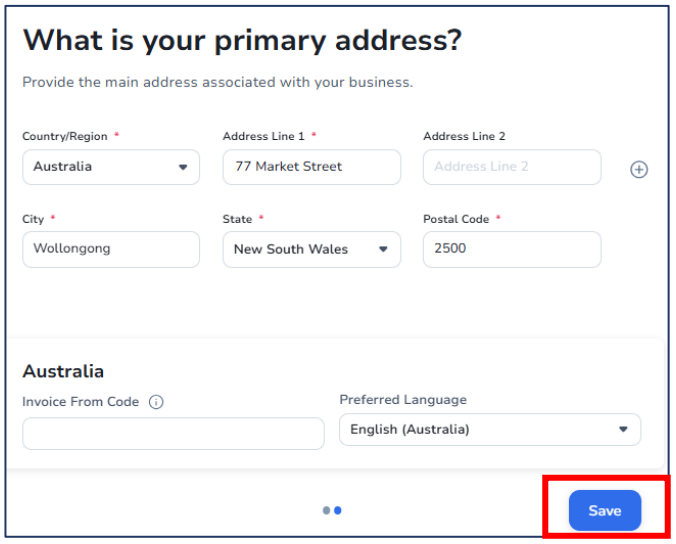
Step 4

On the screen shown on the left, select the following options to transact with IRT:

- Orders and invoicing
- Compliance and risk

You can select any other options applicable to you.

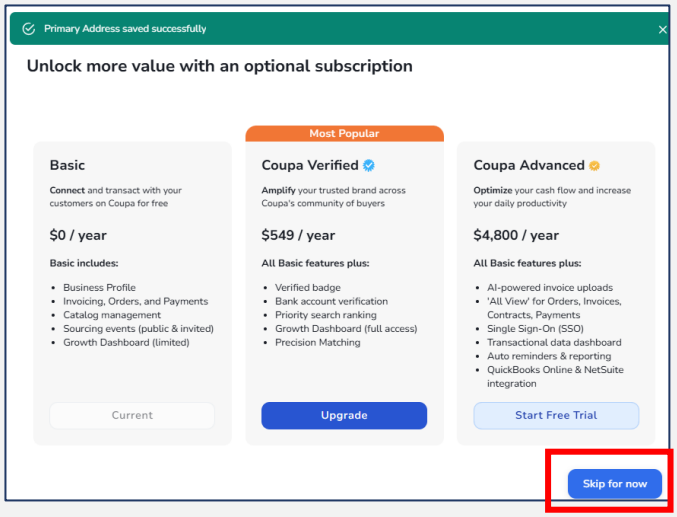
Select **Continue**



Step 5

Enter your company details.

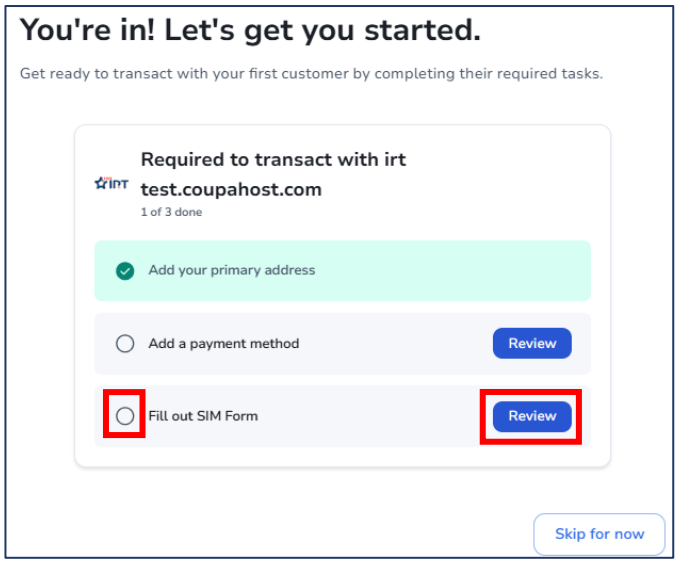
Click **Save.**



Step 6

Select **Skip for now.**

You do **NOT** need to pay anything to transact with IRT.

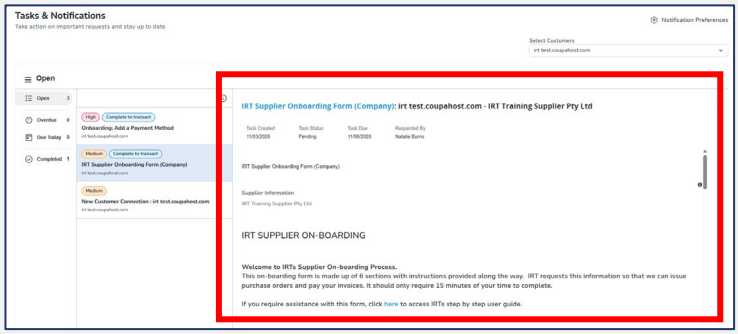


Step 7

Select the **Fill out SIM Form** option and select **Review**.

Proceed to the next page

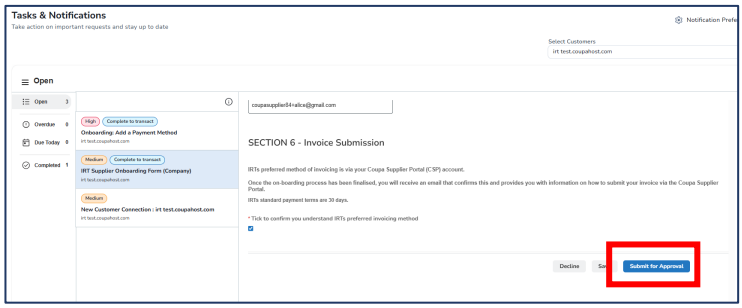
Complete the IRT form (10 minutes)



Step 8

Complete all sections of the IRT Supplier On-Boarding form.

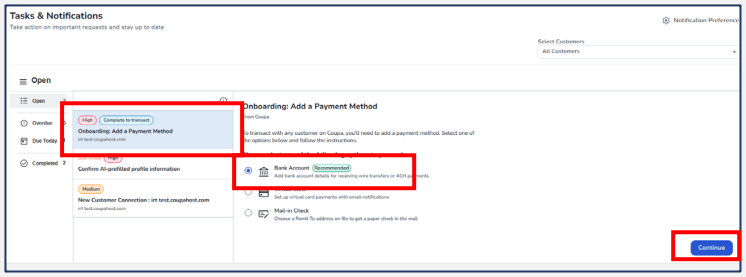
This information will be used to finalise your company information in our purchase to pay system.



Step 9

Once all sections of the form have been completed, select **Submit for Approval.**

Add a Payment Method (5 minutes)

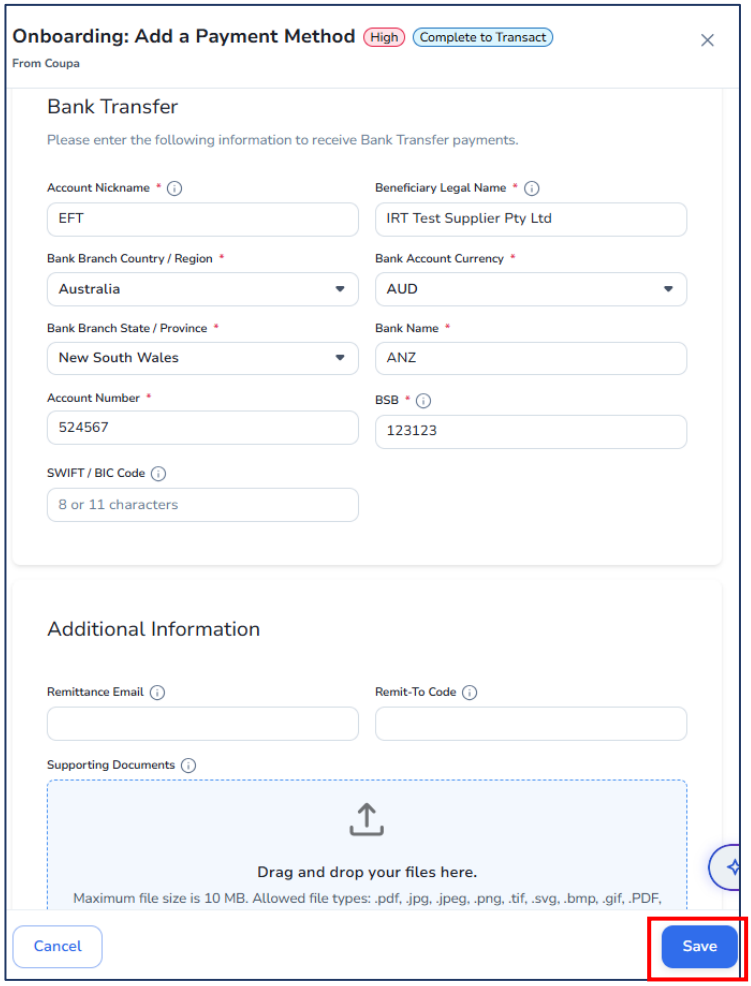


Step 10

Select **Onboarding: Add a Payment Method** from the Tasks & Notifcations page.

Select **Bank Account**

Select **Continue**



Step 11

Complete the required fields. This will enable you to invoice IRT.

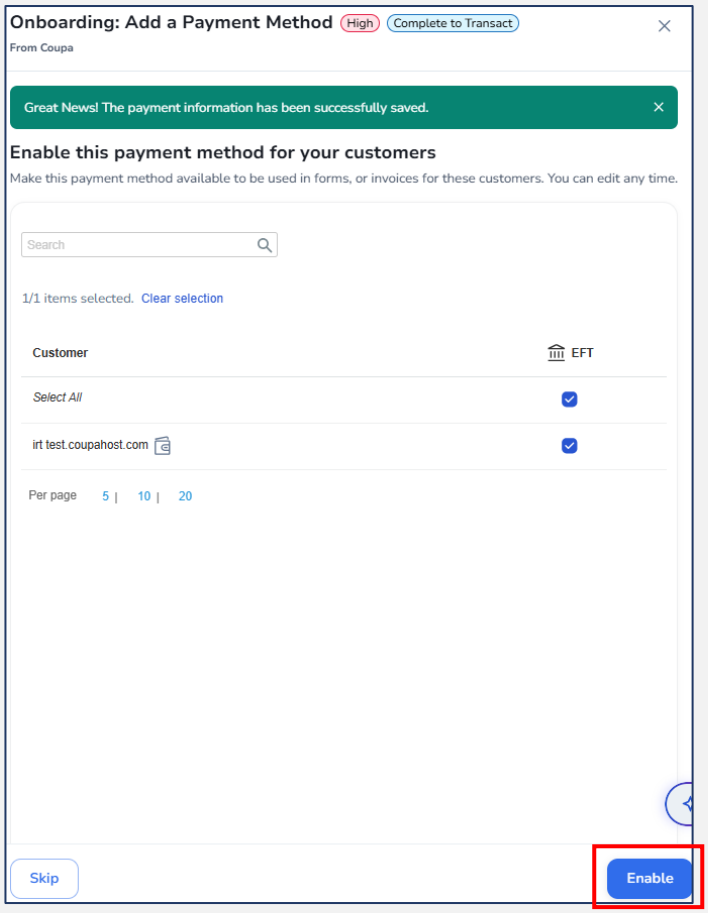
In the Supporting Documents section at the bottom, please upload one of the following:

- Bank statement header
- Deposit slip

Ensure the following:

- The bank name or logo is visible;
- The account name, BSB, and account number are visible; and
- The account name matches the supplier entity/business name.

Select **Save.**



Step 12

Enable your payment method for IRT.

Helpful tips

Use this section if you get stuck on specific parts of the form.



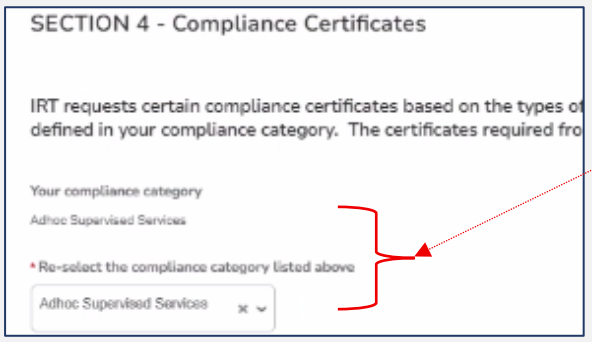
Check your language setting:

- Scroll to bottom of any screen in the Coupa Supplier Portal → set to **English (Australia)**



Contact and Address Information

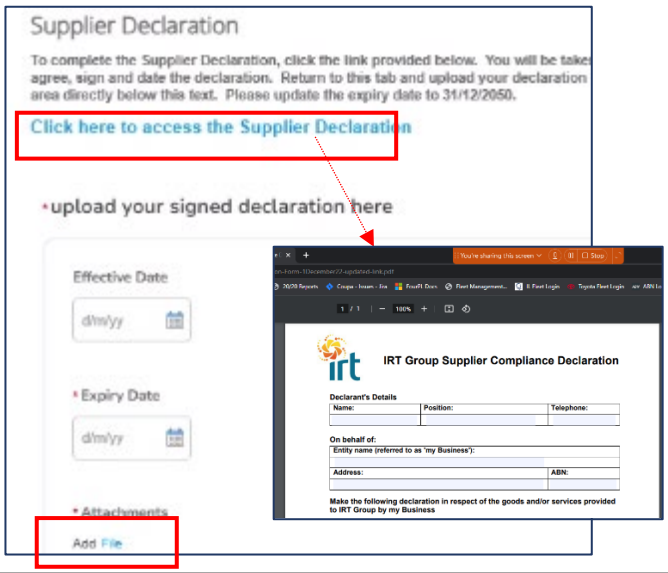
- Enter phone numbers in the correct format as shown.



Compliance Certificates

- Select the compliance category that matches the one shown above.

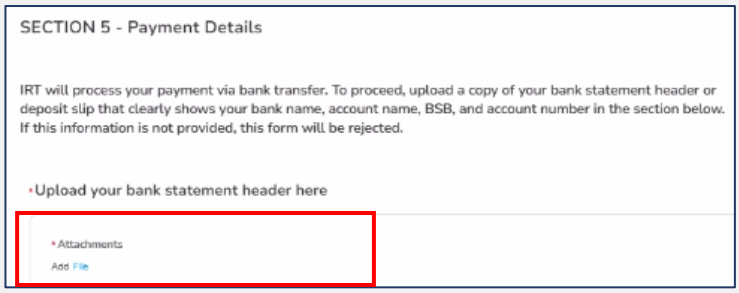
This triggers the compliance documents required by IRT such as insurances, police checks, trade licences etc.



Supplier Declaration

1. Open the link
2. Fill in, sign, and save
3. Upload it back into the form

Use expiry date 31/12/2050 for the supplier declaration.



Bank Details

Upload one of the documents listed below to verify your bank details:

- Bank statement header
- Deposit slip
- Screenshot of online banking

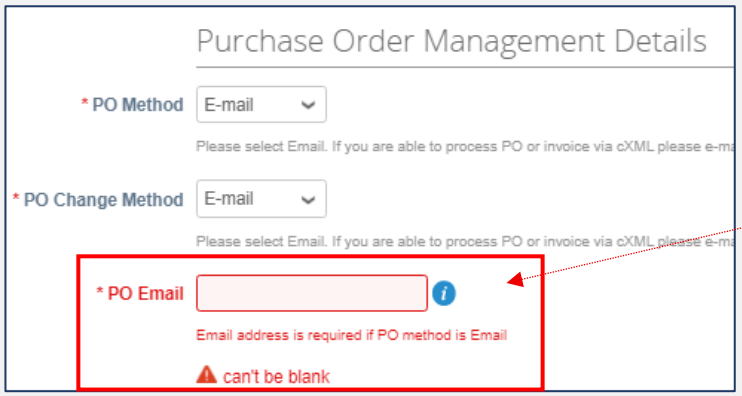
Must show:

- Bank name/logo
- Account name
- BSB
- Account number



Submitting the Form

Click **Submit for Approval** located at the bottom of the form.



Error on submission?

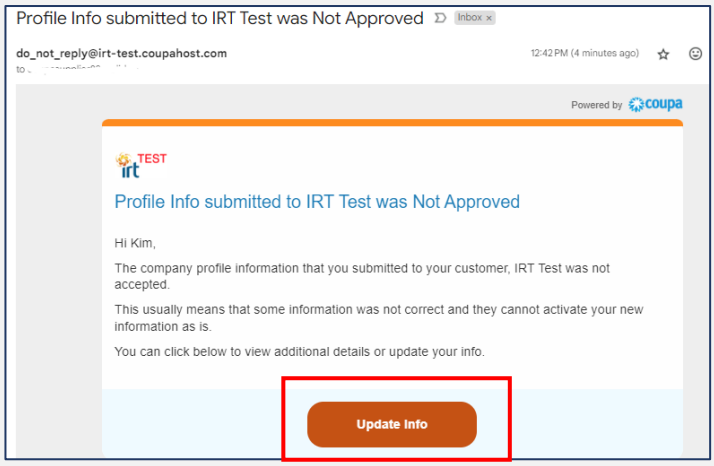
If it won't submit

- Scroll up
- Fix any fields highlighted in **red**

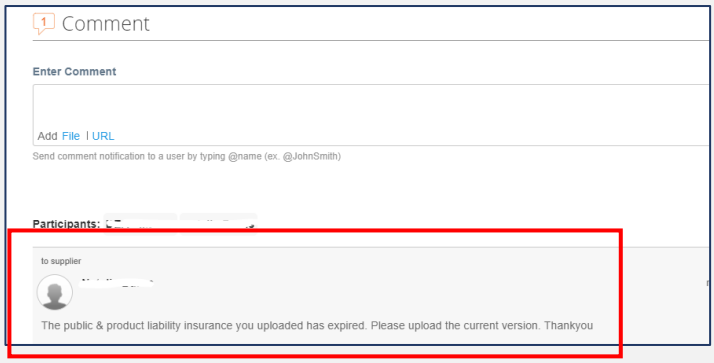


Need to make changes after submission?

You can **Withdraw** the form (if not yet approved)



Comment



If Your Form Is Rejected
You'll get an email or notification.

Common reasons:

- Invalid or closed **ABN**
- Missing information
- Expired or missing documents

Check comments at the bottom of the form and fix the issue.

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What happens next

For IRT Staff

This supplier is now active in Coupa. You can place purchase orders and code and approve invoices when required.

For the Supplier

You may now receive purchase orders for any goods or services required from you.

You can start invoicing for any goods or services already provided. On your invoice, please quote the full PO number if you have received one, including the "IRT" at the beginning e.g. IRT0111111.

Please submit your invoices via the Coupa Supplier Portal. This ensures you are paid on time and can see the status of each invoice submitted in the Portal.

Here is a link to some videos to help with this process if required.

https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/

Please note when submitting an invoice without a PO (blank invoice), the requestor name and email address should be an IRT employee's name and email address. If the service relates to IRT Home Care, the requestor name is Home Care Finance Team and the email is homecareadmin@irt.org.au. If the service is not home care related, the requestor name and email address is the IRT one included in the TO section of this email. This is the person who is engaging you and will be the primary contact unless you are informed otherwise by them.

IRT's standard payment terms are 30 days from date of invoice.

Regards,
IRT Supplier Management

IRT reviews your form.

Once approved:

- You'll receive a confirmation email.
- IRT can start sending purchase orders.
- You can begin invoicing.

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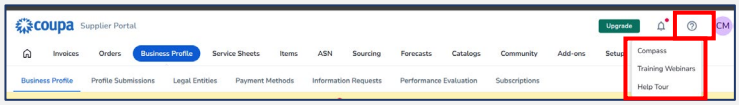
Need help?



There are several avenues for help if you experience any issues:

- In Coupa: click the **"?" icon**
- Email Coupa: **supplier@coupa.com**
- Email IRT: **suppliermgmt@irt.org.au**

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