



HOW TO COMPLETE THE ON-BOARDING PROCESS FOR NEW SUPPLIERS

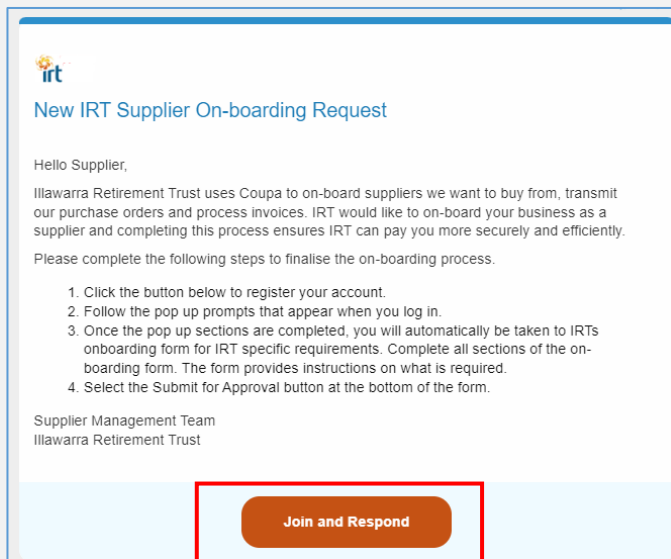
(Increase the zoom to view the screenshots clearly.)

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.

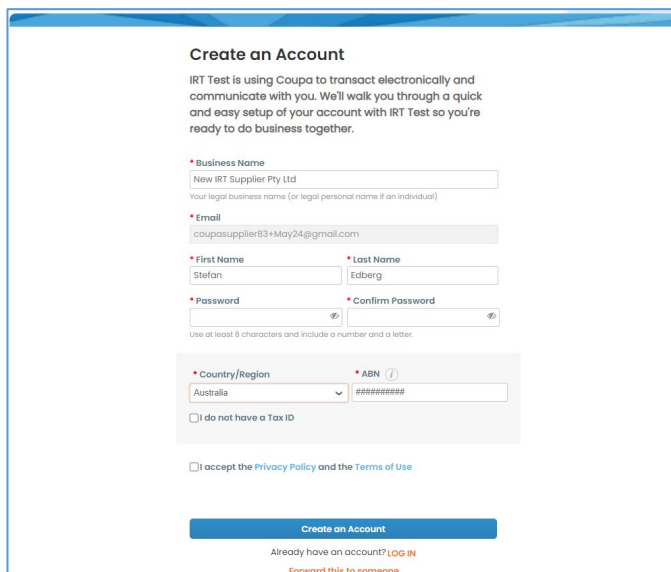
We recommend completing this process on a laptop or PC for a better experience. Using a mobile phone limits the page views and some of the links in the form may not work.

Part 1 – Creating your Coupa Supplier Portal Account

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



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



Step 2

- Create and confirm your password.
- Enter your ABN
- 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.



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Email Verification

We sent a one-time verification code to 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.

Part 2 – General Coupa Supplier Portal Requirements

This part of the on-boarding process should only take 2 minutes

Your Contact Info

* First Name: Stefan

* Last Name: Eotberg

Work Phone: Country/Region, Area/City, Local, Extension

* Business Website:

I do not have a website

* Country/Region of Primary Address: Australia

Next

Step 4

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.



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Make Sure You Get Paid
Confirm location addresses

Primary

* Country/Region
Australia

* Address Line 1
PO Box 77

* City State * Postal Code
Wollongong NSW 2500

* Country/Region * ABN
Australia 12345678911

I do not have a Tax ID [Additional Tax Registration](#)

[Copy To Invoice-From](#)

Invoice-From

Pay-To (Remit-To)

Ship-From

Invite user

Send Invite

Next

Skip for Now

Step 5

In the “Make Sure you Get Paid” pop up, select the “Copy to Invoice From” option to use the same details in that section.

You will have to open that section and enter your ABN manually.

Get Paid with Credit Cards
IRT Test offers fast & secure Virtual Credit Card Payments for your invoices

My company would like to receive credit card payments

Send card to login email Send card to different email
coupasupplier83+newv2@gmail.com
Your virtual credit cards will be sent via encrypted email to this email address.

My company does not accept credit card payments

Invite user

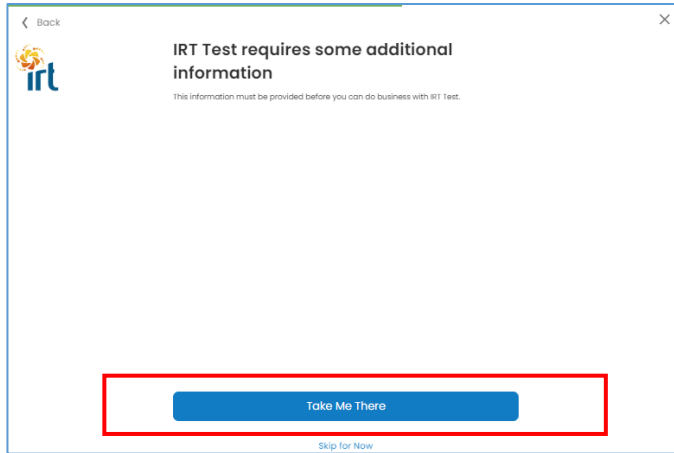
Send Invite

Step 6

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

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 and invoice with no issues.

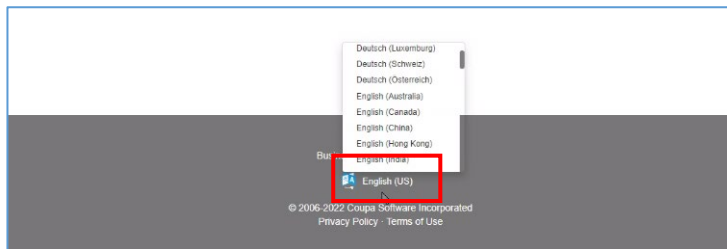


Step 7

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 and refer to Part 3 of this user guide.

Part 3 – IRT Specific On-boarding Requirements

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



Step 8

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).

Proceed to the next page for step 9



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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

The screenshot shows the Coupa Supplier Portal navigation menu. The 'Profile' tab is highlighted with a red box. Below the main menu, the 'Information Requests' sub-tab is also highlighted with a red box.

Step 9

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

Instructions are provided in the form.

You can use the Save button at the bottom of the form anytime to save your progress and complete it later.

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

Part 4 – Section Specific Assistance

If needed, use Part 4 for section-specific assistance.

Supplier Primary Contact

* First name

* Surname

* Email address

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)	

How to enter phone numbers.

This screenshot shows you the correct format for entering your contact numbers in Section 2 – Contact and Address 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

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 asked to 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

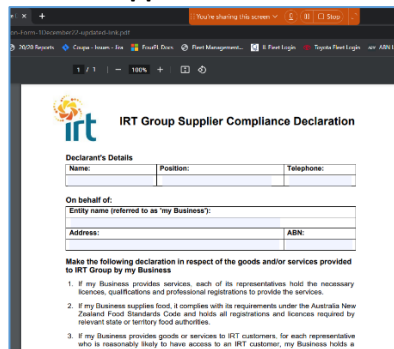
* Attachments
Add File

How to complete Section 4 Compliance Certificate

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 open it in a new tab. Fill in the required fields, sign, date, and save it. Then, return to the Coupa Supplier Portal and upload the file in the Attachments area as shown.
- 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.

Annual Supplier Declaration



IRT Group Supplier Compliance Declaration

Declarant's Details

Name:	Position:	Telephone:
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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

- If my Business provides services, each of its representatives hold the necessary licences, qualifications and professional registrations to provide the services.
- 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.
- If my Business provides goods or services to IRT customers, for each representative who is responsible for access to an IRT customer, my Business holds a National Police Check which is valid for the duration of the contract.



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Adding your bank details

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.

This information will be stored in our payment system and used for each invoice submitted.

Unable to submit

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 your form

You can withdraw your form after submission if you find you have missed something. If IRT have already approved your form, the button will be unavailable.

Notifications in Coup

Form Rejection

You will receive a notification in the Coupa Supplier Portal or via email if your form is rejected.

There are two reasons your form may be rejected:

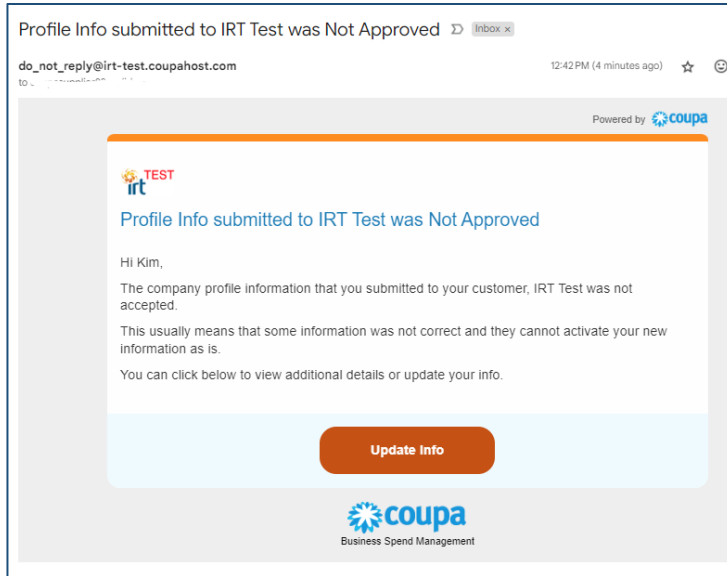
1. The form will do an ABN check to ensure the ABN provided on the form is valid and will then route to IRT for review and approval. If the ABN is not valid or has been closed, you will receive a rejection



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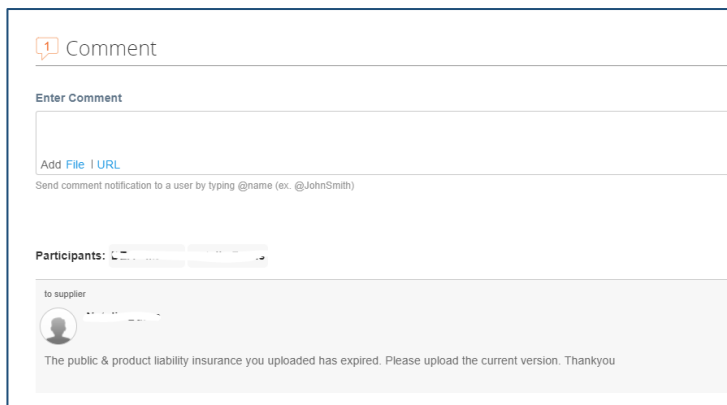
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By Email

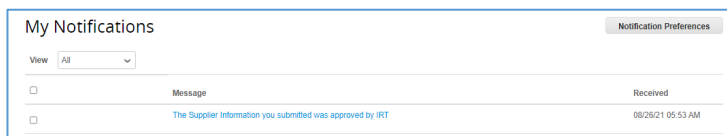


notification. You will need to open the initial form and update the ABN to a valid ABN number.

2. If there is missing information on the form, or expired certificates, IRT will reject the form and you will receive a notification. Scroll to the bottom of the form to review the comment, this will advise what was missing.



Part 5 – Finalising On-boarding as a supplier to IRT



Once you submit your form, it will be reviewed by IRT to make sure all requirements have been met.

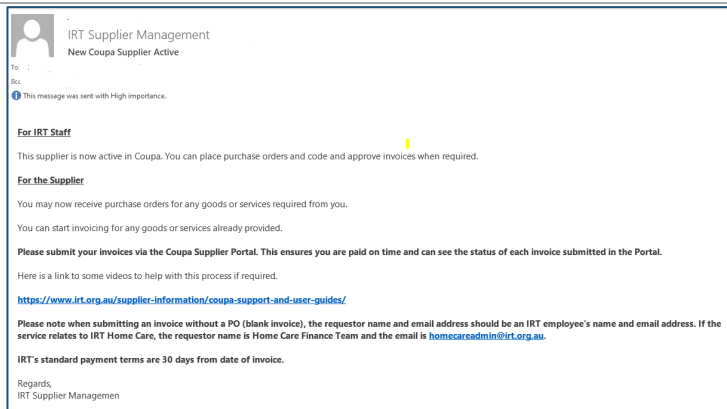
On approval of your form, you will receive a notification as shown in the screenshot and you will also receive a confirmation email from suppliermgmt@irt.org.au.

IRT can then begin issuing purchase orders as required and you can begin invoicing.

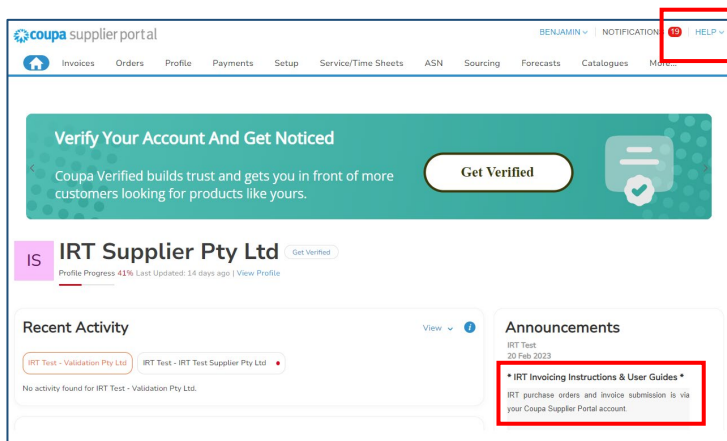


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Part 6 – Getting help with the Coupa Supplier Portal

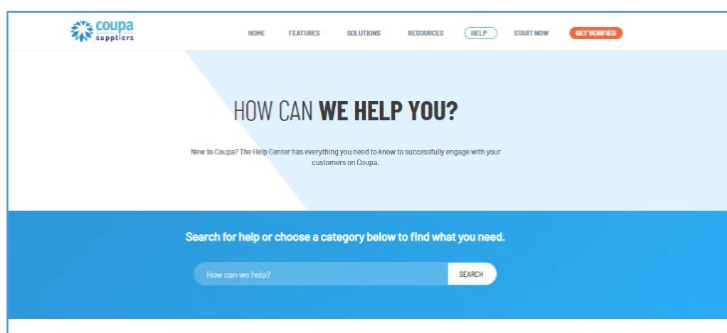


Step 17

Coupa provides help for suppliers using the CSP as does IRT.

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.



You can also email Coupa with any issues to supplier@coupa.com.

You can access IRT's short user guides and video's by clicking on the link in the Announcements section on the home page, or via the purchase order and invoicing tabs.