



HOW TO COMPLETE THE ON-BOARDING PROCESS FOR NEW SUPPLIERS

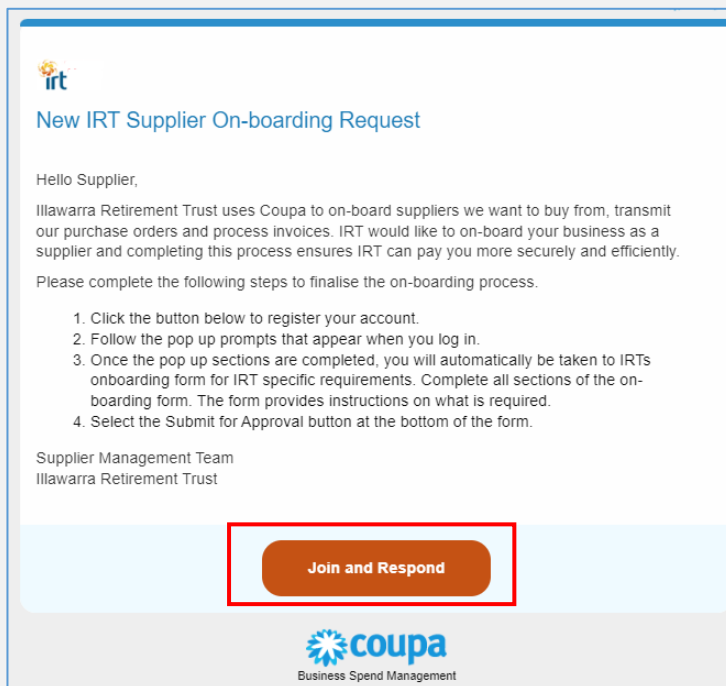
(Increase the zoom to view the screenshots clearly.)

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 and proceed to step 2.



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

Create an Account

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

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

*** Email**
coupasupplier83+May24@gmail.com

*** First Name** Stefan *** Last Name** Edberg

*** Password** *** Confirm Password**
Use at least 8 characters and include a number and a letter.

*** Country/Region** Australia *** ABN** (?) #####
 I do not have a Tax ID

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

Create an Account

Already have an account? [LOG IN](#)
[Forward this to someone](#)

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.

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

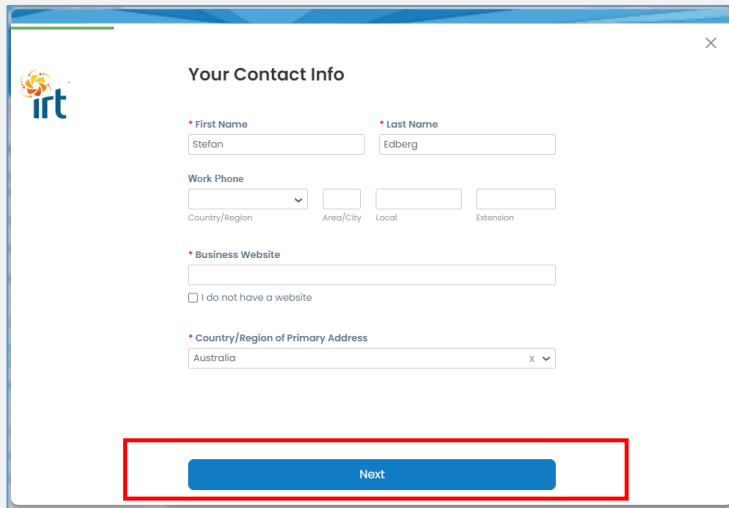
If you did not make this request, you can ignore this email.

Business Spend Management

The email will look like this.

Part 2 – General Coupa Supplier Portal Requirements

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

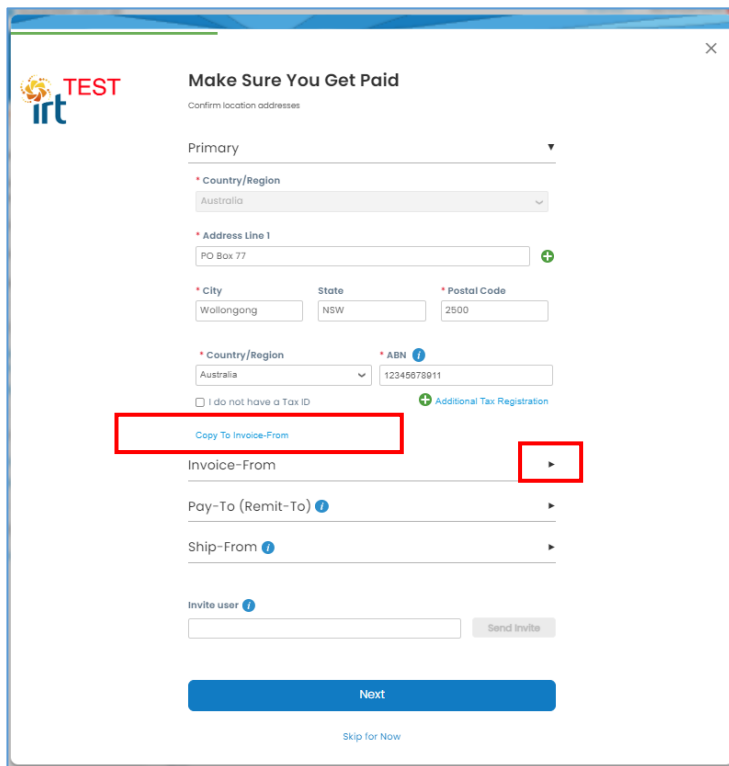


The screenshot shows a web form titled "Your Contact Info" with the IRT logo in the top left. The form contains the following fields: "First Name" (Stefan), "Last Name" (Edberg), "Work Phone" (Country/Region, Area/City, Local, Extension), "Business Website" (with a checkbox "I do not have a website"), and "Country/Region of Primary Address" (Australia). A blue "Next" button is highlighted with a red rectangular box at the bottom of the form.

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.



The screenshot shows a web form titled "Make Sure You Get Paid" with the IRT logo and "TEST" in the top left. The form is for "Confirm location addresses" and includes: "Primary" dropdown, "Country/Region" (Australia), "Address Line 1" (PO Box 77), "City" (Wollongong), "State" (NSW), "Postal Code" (2500), "Country/Region" (Australia), and "ABN" (12345678911). There is a checkbox "I do not have a Tax ID" and a link "Additional Tax Registration". A blue button labeled "Copy To Invoice-From" is highlighted with a red box. Below it are dropdowns for "Invoice-From", "Pay-To (Remit-To)", and "Ship-From", each with a right-pointing arrow. A "Next" button is at the bottom, and a "Skip for Now" link is below it.

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.



COUPA SUPPLIERS QUICK REFERENCE GUIDE

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, 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.

IRT Test requires some additional information

This information must be provided before you can do business with IRT Test.

Take Me There

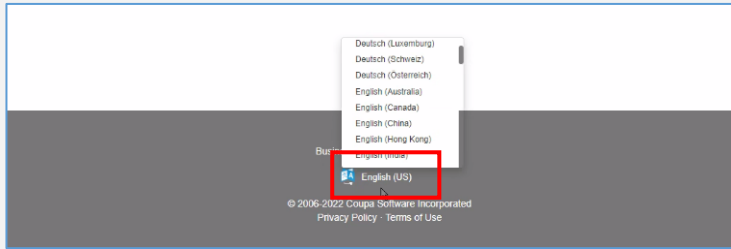
Skip for Now

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).

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.

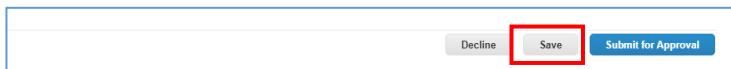
ABN

Select the regions you supply to

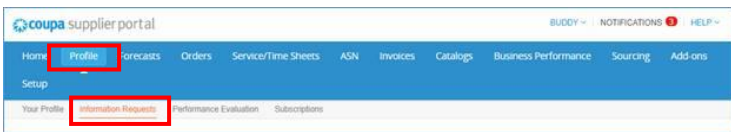
Click in the box to access the options in a drop down

Step 9
 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".



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

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 10

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.

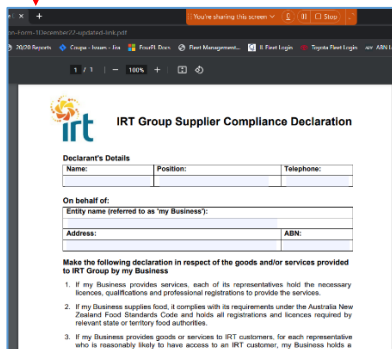
[Click here to access the Annual Supplier Declaration](#)

* upload your signed declaration here

Effective Date
mm/dd/yy

* Expiration Date
mm/dd/yy

* Attachments
Add File



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

- If my Business provides services, each of its representatives hold the necessary licenses, 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 reasonably likely to have access to an IRT customer, my Business holds a valid and current Certificate of Identity for the relevant state or territory.

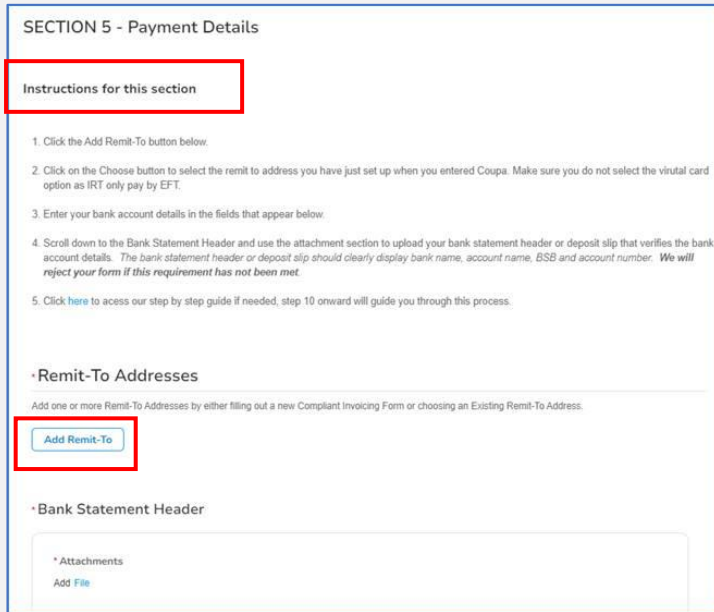
Step 11

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.

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

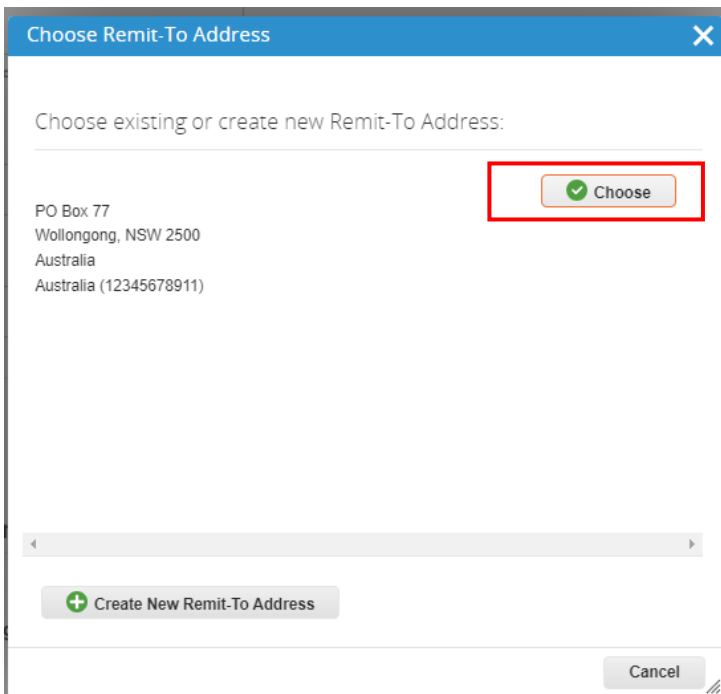
Add File

Step 12

Steps 12 to 15 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 13

After selecting the Add Remit To button mentioned in step 12, 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**

 i

*** Bank Account Number**

 i

Bank Country/Region

Step 14
You will land back in the on-boarding 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 15
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

Step 16
 Verify you understand IRTs preferred invoicing method and submit for approval.

Purchase Order Management Details

* PO Method

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

* PO Change Method

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

* PO Email

Email address is required if PO method is Email

⚠ can't be blank

Step 17
 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 18
 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

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

Step 19
 This is all that is required to complete the IRT new supplier process.

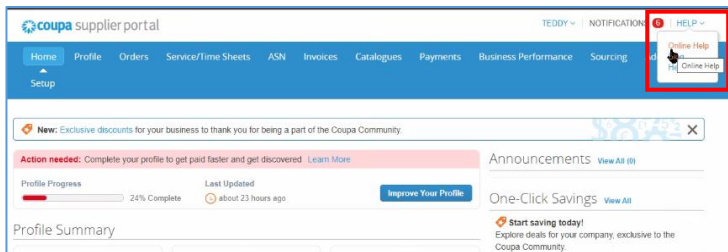


COUPA SUPPLIERS

QUICK REFERENCE GUIDE

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.

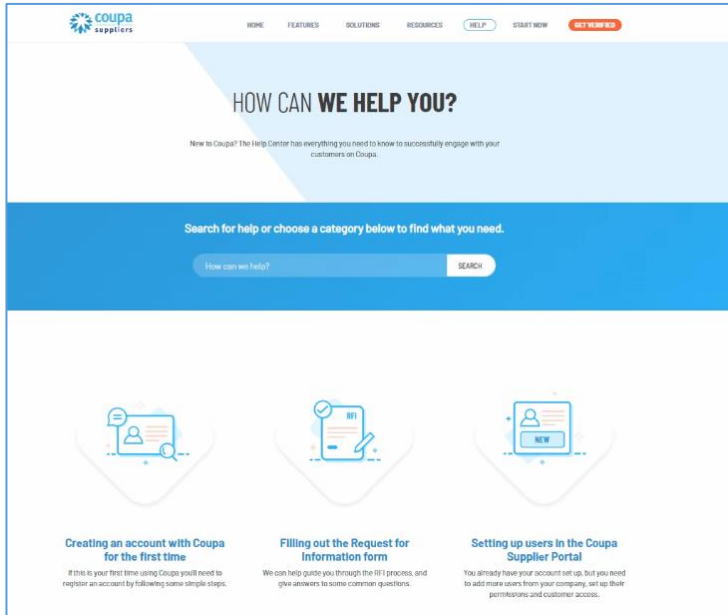
IRT can then begin issuing purchase orders as required.



Step 20

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.