



SUPPLIER PORTAL QUICK REFERENCE GUIDE

COUPA REGISTRATION & PROFILE SET-UP

For NEW G8 Education Suppliers

WHAT'S COVERED IN THIS GUIDE?

- Invitation to Join Coupa (Email)
- Creating Your Coupa Account
- Closing the Public Profile Pages
- Setting Up Your Business Profile with G8 Education
- Customer Setup
- Completing Remit-To Address
- Other Requirements
- Profile Submitted Confirmation

WHERE DO I GO IF I NEED HELP?

INVITATION TO JOIN COUPA (EMAIL)

1. Check your email inbox for an invitation from G8 Education.
2. Select the 'Join and Respond' link in the email to begin the registration process.

NOTE:

If you haven't received the invitation, check your spam/junk folder first, and if it's not there, email themarketplacesuppliers@g8education.edu.au to request an invite.



CREATING YOUR COUPA ACCOUNT

1. Insert your Business Name, Email Address, Name and Password into the online form.
2. Read Coupa's Privacy Policy and Terms of Use. You can agree to these terms by clicking inside the box.
3. Select CREATE NEW ACCOUNT.

You are now registered on Coupa and ready to create your account.

NOTE:

If you're the first user in your company to register on the CSP, you'll automatically be assigned Admin/Set-Up privileges.

You can invite others any time by entering their email address in the **Forward Email** field in the Forward your invitation section and selecting Submit, or by selecting the **Forward this to someone** link if you see the welcome message.

The screenshot shows the 'Create an Account' page on the Coupa Supplier Portal. The page title is 'coupa supplier portal' and it is marked as 'Secure'. The main heading is 'Create an Account'. Below the heading, there is a brief introduction: 'G8 Education is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with G8 Education so you're ready to do business together.' The form contains the following fields and elements:

- 1**: Business Name (with a sub-note: 'Your legal business name (or legal personal name if an individual)').
- 2**: Email.
- First Name and Last Name (separate fields).
- Password and Confirm Password (separate fields).
- A note: 'Use at least 8 characters and include a number and a letter.'
- A checkbox: 'I accept the Privacy Policy and the Terms of Use'.
- A blue button: 'Create an Account'.
- Links: 'Already have an account? LOG IN' and 'Forward this to someone'.

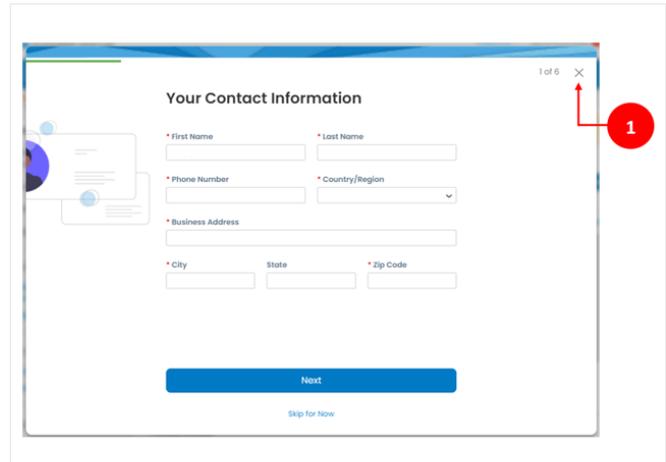
IMPORTANT NOTE:

While setting up your profile for G8 business, you will have the option to complete a public profile on the CSP to share your details with Coupa's other customers. **You DO NOT need to complete your public profile to supply goods or services to G8 Education.** Completing your public profile with Coupa does not trigger any entitlement to be paid faster by G8 Education. We will pay you in accordance with our purchase order terms and conditions irrespective of whether or not you complete your public profile on the CSP.

CLOSING THE PUBLIC PROFILE SET-UP PAGES

1. Select the 'X' in the top right corner to close this page.

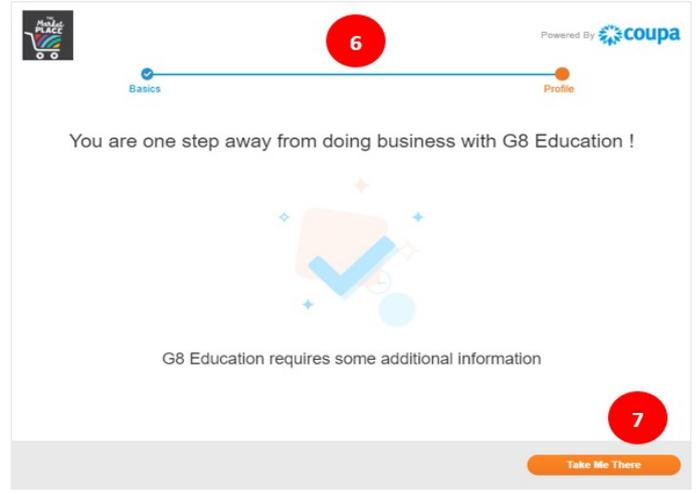
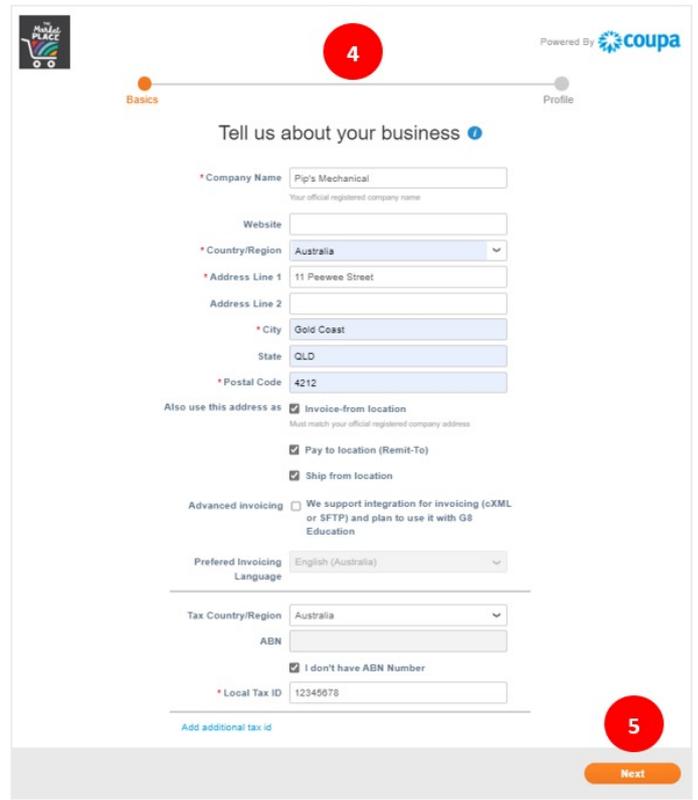
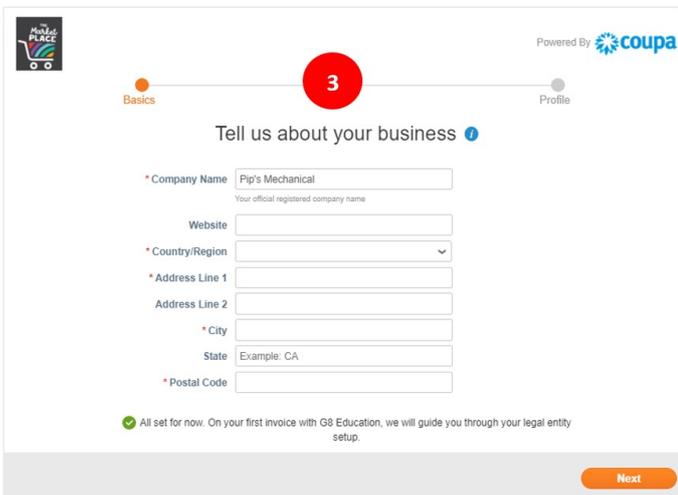
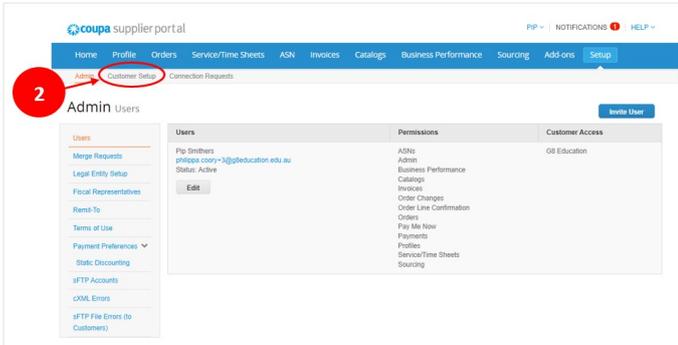
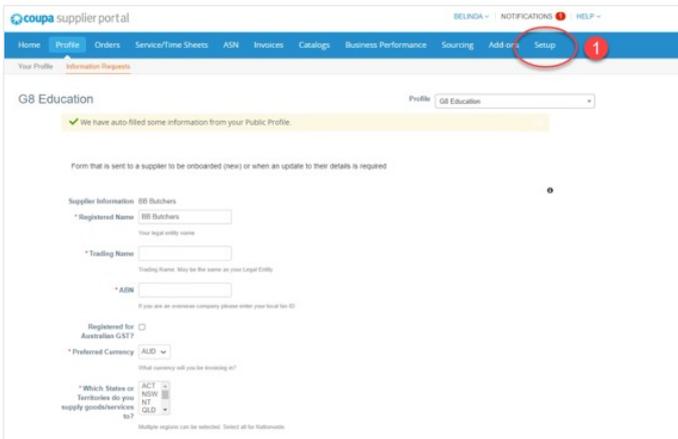
Closing this page will redirect you to your Coupa Dashboard where you will be able to set up your business profile with G8 Education.



SETTING UP YOUR BUSINESS PROFILE WITH G8 EDUCATION

You are now on your Company Profile page.

1. Select 'Setup'
2. Select 'Customer Setup'.
3. 'Tell us about your business' form will display. **The form will expand as entries are made.**
4. Complete your basic business profile by populating the form fields.
5. Select 'Next'.
6. You're just one step away from doing business with G8 Education.
7. Select 'Take Me There'.



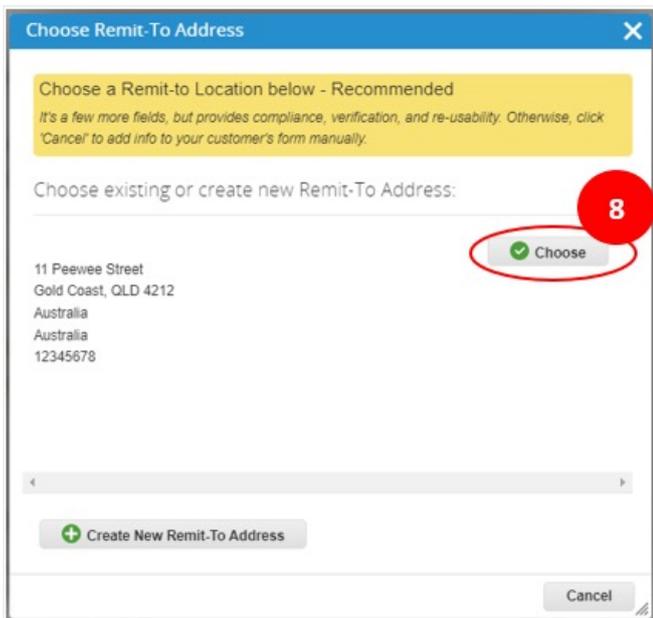
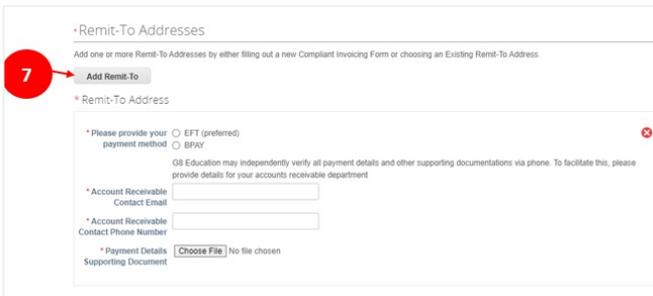
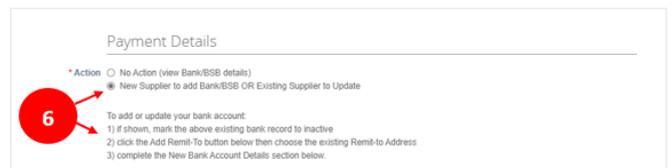
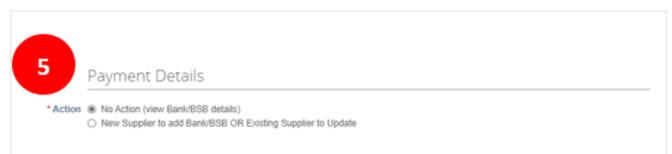
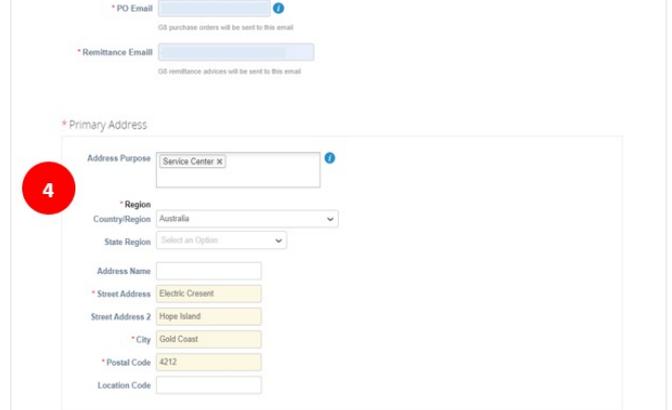
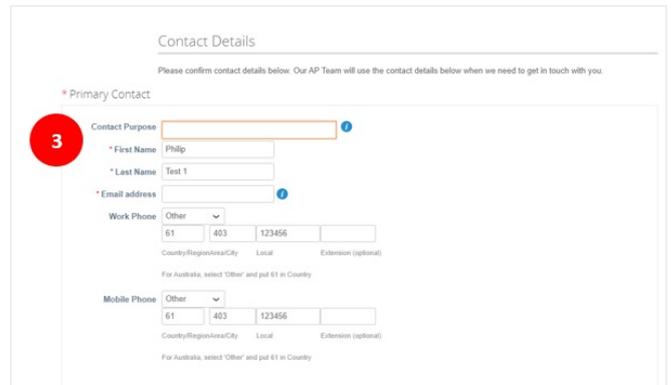
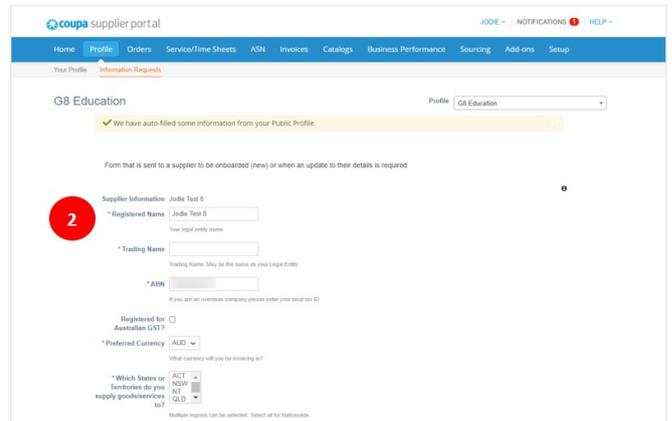
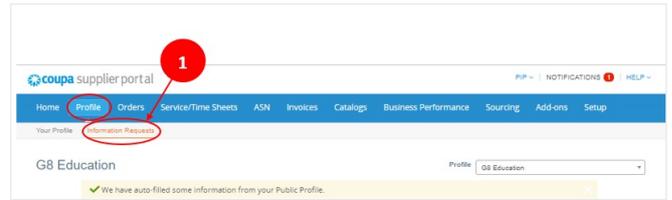
CUSTOMER SETUP

You are now back on your Company Profile page.

1. Select Information Requests.
2. Enter supplier information, trading name, ABN, operating states etc.
3. Enter the Primary Contact details for your business/ company, along with the email addresses for Purchase Orders and Remittances.
4. Enter your Primary Address details.
5. Payment Details will display as 'No Action' by default.
6. Select 'New Supplier to Add Bank/BSB...'

NOTE: If you are adding or updating your bank account, you'll need to mark any existing account as 'inactive' before completing the New Bank Account Details section.

7. Select 'Add Remit-To'
8. Select 'Choose' on the Remit-To Address form that pops up onto the screen.



COMPLETE REMIT-TO ADDRESS

1. Select your preferred payment method.
2. Depending on your selection of EFT or BPAY, the form fields will automatically adapt to suit.

Complete the form fields with your banking details.

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

* Remit-To Address

* Please provide your payment method EFT (preferred) BPAY

G8 Education may independently verify all payment details and other supporting documentations via phone. To facilitate this, please provide details for your accounts receivable department

* Account Receivable Contact Email

* Account Receivable Contact Phone Number

* Payment Details Supporting Document No file chosen

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Add Remit-To

* Remit-To Address

* Please provide your payment method EFT (preferred) BPAY

G8 Education requires Australian EFT Bank Details

* Bank Name

* BSB Number

* Bank Account Number

G8 Education may independently verify all payment details and other supporting documentations via phone. To facilitate this, please provide details for your accounts receivable department

* Account Receivable Contact Email

* Account Receivable Contact Phone Number

The bank EFT verification can be in any one of the following formats:

1. Bank EFT deposit slip
2. Signed and dated letter from the bank showing account name and number.
3. Bank statement with transactional details omitted.
4. Screenshot from internet banking showing account name and number.

* Payment Details Supporting Document No file chosen

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

* Remit-To Address

* Please provide your payment method EFT (preferred) BPAY

G8 Education requires Australian BPAY Details

* BPAY ID

G8 Education may independently verify all payment details and other supporting documentations via phone. To facilitate this, please provide details for your accounts receivable department

* Account Receivable Contact Email

* Account Receivable Contact Phone Number

The BPAY verification can be in any one of the following formats:

1. Bank confirmation of your BPAY details
2. Signed and dated letter from the bank showing your BPAY ID
3. BPAY statement with transactional details omitted
4. Screenshot from internet banking showing your BPAY ID

* Payment Details Supporting Document No file chosen

OTHER REQUIREMENTS

1. Select 'Yes' or 'No' to advise if there is a 'Conflict of Interest'. If 'YES' is selected a box will appear to capture the conflict.
2. Add Public Liability Insurance details and upload proof of insurance.
3. Select 'Yes' or 'No' to tell us if you will be visiting our facilities during business hours. If 'YES' is selected new form fields will appear to capture the details of your Blue Card/Working with Children Card.
4. Click 'Submit for Approval'

Other Requirements

* Does your organisation have any conflicts of interest with G8 Education Limited? A conflict of interest could include (but is not limited to):

No Yes

A conflict of interest could include (but is not limited to):

- an employee of the Supplier having a personal or any other private relationship with a G8 Education employee;
- the Supplier is owned or controlled by a competitor of G8 Education Limited;
- the Supplier employees or has otherwise engaged a current employee of G8 Education Limited; or
- the Supplier has provided a gift or incentive to a G8 Education employee to facilitate the suppliers engagement

* Public Liability Insurance

Effective Date

* Expiration Date

* Attachments

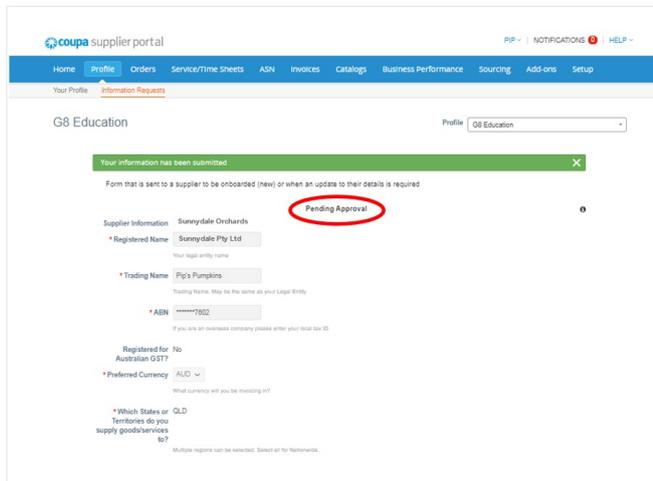
Description

* Will you be attending our centres during business hours? Yes No

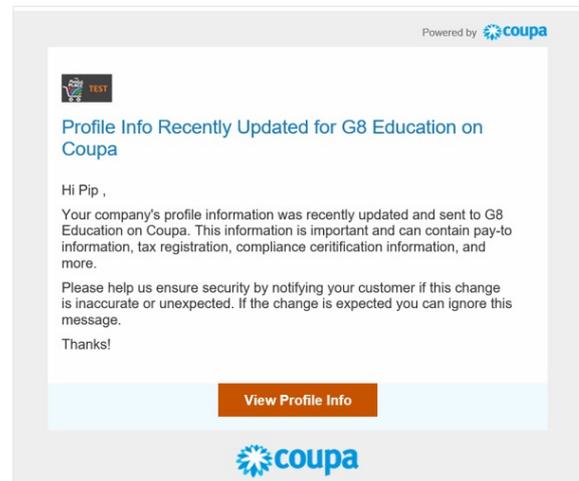
YOU WILL RECEIVE CONFIRMATION THAT YOUR PROFILE HAS BEEN SUBMITTED TO G8 EDUCATION.

Your profile will display as **'Pending Approval'**.

...and you'll receive confirmation by email, that your profile was submitted.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below this, the 'Information Requests' section is active. The main content area shows 'G8 Education' as the selected profile. A green notification bar at the top of the form states 'Your information has been submitted'. Below this, a message reads 'Form that is sent to a supplier to be onboarded (new) or when an update to their details is required'. The status 'Pending Approval' is circled in red. The form fields include: Supplier Information: Sunnydale Orcharads; Registered Name: Sunnydale Pty Ltd; Trading Name: Pip's Pumpkins; ABN: 7502; Registered for: No Australian GST; Preferred Currency: AUD; and a checkbox for 'Which States or Territories do you supply goods/services to?'. A 'View Profile Info' button is visible at the bottom right of the form area.



The screenshot shows an email notification from Coupa. The header says 'Powered by coupa'. The main content area has a subject line 'Profile Info Recently Updated for G8 Education on Coupa'. The body of the email reads: 'Hi Pip , Your company's profile information was recently updated and sent to G8 Education on Coupa. This information is important and can contain pay-to information, tax registration, compliance certification information, and more. Please help us ensure security by notifying your customer if this change is inaccurate or unexpected. If the change is expected you can ignore this message. Thanks!'. At the bottom, there is a 'View Profile Info' button and the Coupa logo.

A **Two-factor authentication (2FA)** prompt may be presented to every supplier when first logging into the CSP, and to existing suppliers who haven't yet set-up this function. It is an optional feature that can be closed by clicking the 'x' or 'Cancel' button.

To set up this feature, please refer to the **Two-Factor Authentication Quick Reference Guide**.

WHERE DO I GO IF I NEED HELP?

- For technical assistance with Coupa go to: supplier.coupa.com/help/ - if you cannot find an answer there, email: supplier@coupa.com
- For all procurement-related enquiries, email themarketplacesuppliers@g8education.edu.au