Entering Details of your Organisation into Coupa

For Charities and other Organisations who receive Community Matters Donations and for JLP Partners who help support the process.

Purpose:

This guide explains how Charities or other Organisations should enter their details into **Coupa**, which is the system the John Lewis Partnership (JLP) uses to manage and raise its donations. Once your Organisation has been selected to receive a donation from JLP, you will **receive an email** to invite you to **create an account** in Coupa. It is here where you enter all the details JLP needs to make its donation to you.

When completing your details in Coupa, please note that all fields marked * are **mandatory** and cannot be left blank.

Note: We recommend that you use the **Google Chrome** web browser to perform the steps described below.

Important message: Registering on Coupa is **FREE OF CHARGE**. If you receive a message asking you to 'Verify your Business' for a fee (usually in US Dollars), this is merely a Coupa marketing advert which you can ignore and skip (click on X to close). The John Lewis Partnership does not expect you, or require you, to pay any fee to register on Coupa.

Actions:

1. On receipt of the email click **Join and Respond**

2. Create a **Password** for yourself and **re-enter** this to **confirm**
3. **Tick** to accept the **Privacy Policy** and **Terms of Use**
4. Click **Create an Account**

5. You will now be sent an email with a **Six Digit Code** to verify your email address

6. Enter this code into Coupa and click **Next**

7. Enter your **Contact Information** such as Name, Phone Number, Country, Address, City and Postcode. Once complete, click **Next**

Your Contact Information

7

* First Name
Sarah

* Last Name
Smith

* Phone Number
01234 456789

* Country/Region
United Kingdom   x ∨

* Address
1 High Street

* City
London

State

* Postal Code
N1 1NW

Next

Skip for Now

8. We don't need to know about your website, Tax ID or DUNS number so you can tick the boxes as shown and click **Next**

Tell Us About Your Business

8

Business Website

☑ I do not have a website

Tax ID (or Local ID)

Tax ID is to confirm you are a real business. Individuals may use your Social Security number.

☑ I do not have a Tax ID

DUNS Number

Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.

Next

9. Next, you will get a message saying we need some additional information. Click **Take Me There**

10. Enter your **Charity Name** (or name of your Organisation) and your **Charity Registration Number** (if applicable)

11. Enter a **Summary** of the work your organisation does.

Note: This should include why you have been given the donation, how you are going to use the grant and the difference it will make.

12.　Next, click **Add Remit-To**

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　　12

13.　Click **Create New Remit-To-Address**

Choose Remit-To Address　　✕

This customer requires you to choose a Remit-To Address that includes payment information.

Choose existing or create new Remit-To Address:

⊕ Create New Remit-To Address　　13

Cancel

14.　Enter the **Legal Entity Name** and the **Country**

15.　Click **Continue**

14　*Legal Entity Name　Home Help UK　　This is the official name of your business that is registered with the local government and the country/region where it is located.
　　Country/Region　United Kingdom

Cancel　Continue　15

16.　Describe the **Type of Company** (eg. Charity or Community Group)

17.　Click **Save & Continue**

18. **Tick** the 'All' and the 'John Lewis Partnership' boxes

19. Enter your **Address** details are correct and amend if not

20. **Tick** both boxes ('Remit to' and 'Ship From')

21. If you are VAT registered, enter your **VAT ID**

22. If you are not VAT registered, **Tick** the box 'I don't have a VAT/GST Number'...

23. …and type is '**Not Registered**' into the **Local Tax ID box**

What is your Tax ID? ⓘ

Country/Region	United Kingdom	✕
21 VAT ID		
22	☑ I don't have a VAT/GST Number	
* Local Tax ID	Not Registered	**23**

24.   Leave 'Invoice From Code' blank

25.   Click **Save & Continue**

Miscellaneous

24 Invoice From Code		ⓘ
Preferred Language	English (UK) ⌄	**25**
	Cancel	**Save & Continue**

26.   For Payment Type, **Bank Account** is automatically selected and cannot be changed

Where do you want to receive payment?

26   1 2 **3** 4

* Payment Type   Bank Account ⌄

27.   Enter the details of your **Organisation's Bank Account**:

27.1.   **Beneficiary Name**,

27.2.   **Bank Name**,

27.3.   8 digit **Account Number**

27.4.   6 digit **Sort Code**

28.   Tick My bank does not have a BIC code if you are UK based

29.   Select **Business** for the Bank Account Type (please note Personal Accounts are **not** acceptable)

What are your Bank Account Details? ⓘ

Bank Account Country/Region:	United Kingdom
Bank Account Currency:	GBP
Beneficiary Name:	Home Help (UK)
Bank Name:	HSBC
Account Number:	12345678
Confirm Account Number:	12345678
Sort Code:	112233
SWIFT/BIC Code:	

27

☑ My bank does not have a BIC code
Wire payments made to you by customers might fail

28

Branch Code:	
Bank Account Type:	Business

29

30.   Click **Choose Files** (see note at the end of this document*)

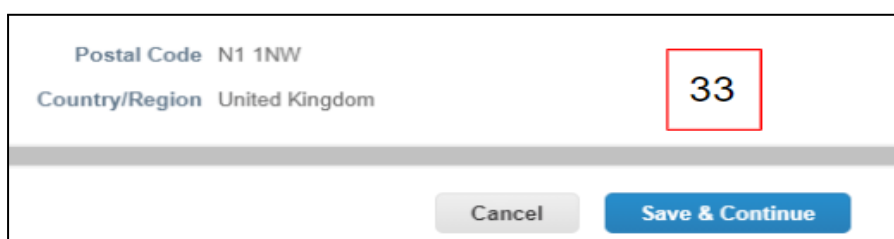|	
Bank Account Type:	Business
Supporting Documents	Choose Files No file chosen

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PARTNERSHIP

coupa

31. Locate where you have saved the file containing the **Bank Account** details and **double click** on the File Name
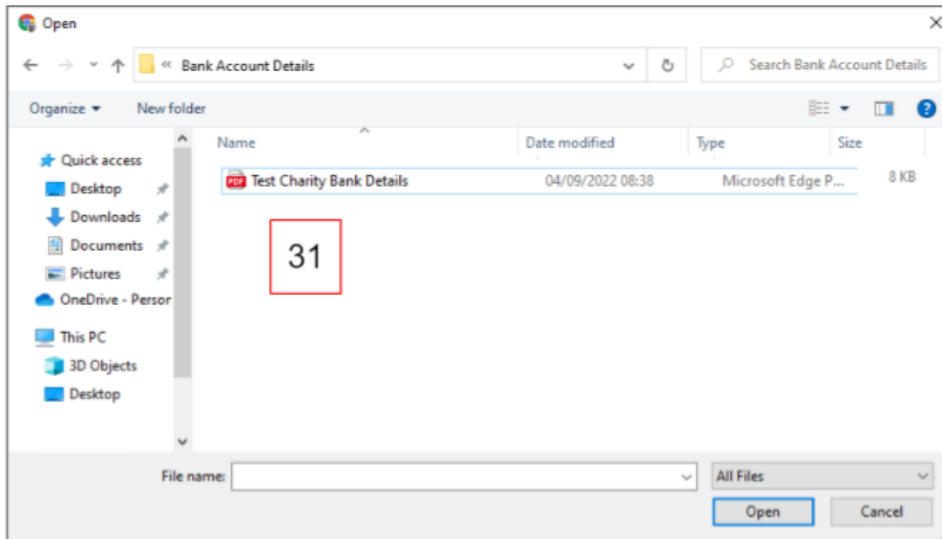
32. This adds the file into Coupa as shown here:
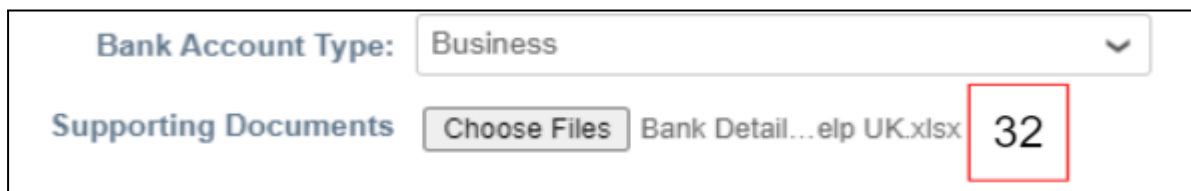
33. To complete this page, click **Save & Continue**

34. Next you will be presented with the final steps to complete your Remit to Details

35. On the next screen (3 of 4), click **Next**

36. On the next screen (4 of 4) click **Done**

37. On the Setup Complete page, Click **Add Now**

38. You are now taken back to the original form, to complete, first choose the option that best describes your **Charity Organisation Type**. Select 'Other' in none apply

39. Complete the **Bank Branch Name** and the **Bank Account Name** if these fields are empty

40. Check that the **Proof of Bank Account** file is attached. If not, click **Choose File** and re-follow steps 30 to 32

41. Make sure all fields marked * are completed for your address details

42. Enter a **Remittance email address**. We will send you a notification to this email when we make a payment to you

43. As Coupa is an American based organisation, the **Country/Region** will always default to the United States. Please change this to **United Kingdom**

44. **Tick** the box to accept the statement

45. Click **Submit for Approval**

46. If you receive any **Red Error Messages**, scroll back up the page and correct

47. Once all sections are completed, you should you then receive this **Confirmation Message**

What happens next?

- On receipt on your submission, the John Lewis Partnership will check and approve the details and raise a donation to you in due course

- Once a donation is approved, you will receive a notification that a **Purchase Order** has been raised. No action is required by you - this notification and PO is for information only and merely informs you that a payment is on its way.

- If you have any follow up queries, it will be helpful if you can quote the PO number (which will look something like this - JLDCM000000123)

Additional Notes:

* We need to see proof of your organisation's bank account before we can make our payment to you. Therefore, please be prepared to attach a scanned copy or image (PDF or Image file) showing the bank account details. This can be an image or scan of a cheque, a paying-in slip, or the top section of a bank statement showing the account details.