

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**

John Lewis Partnership Profile Information Request - Action Required

Dear Charitable Organisation,

We would like to onboard you to John Lewis Partnership's supplier portal "Coupa".

Click [Join and Respond](#) below to register on Coupa Supplier Portal, then enter and submit your details via the JLP Customer Profile within 30 days.

Please read and follow our [Coupa Registration Guide \(click to open\)](#) while completing your registration and submitting your details. NB Ignore the Payment Discount Preferences screen; this is not enabled in John Lewis Partnership.

If you'd like to read more information about Coupa please click [here](#)


Following the use of the above guides, if you have further questions you can email coupa_onboarding@johnlewis.co.uk for support


[Join and Respond](#) 1

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**

* First Name Sarah

* Last Name Smith

2 * Password 

* Confirm Password 

Use at least 8 characters and include a number and a letter.

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

4

[Create an Account](#)

Already have an account? [LOG IN](#)

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**

A screenshot of the "Email Verification" form. It has the title "Email Verification" and the text "We sent a one time verification code to wavetwotesting+sarah.smith@gmail.com". Below this is a light blue box containing six input fields with the digits 1, 2, 9, 5, 8, and 8. Below the input fields is the text "Didn't receive the Verification Code?" followed by a blue link "Request a New Code". A red box highlights the digit "6" in the input field. At the bottom is a blue button labeled "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 * Last Name

* Phone Number

* Country/Region X ▾

* Address

* City State * Postal Code

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**

John Lewis Partnership requires some additional information

This information must be provided before you can do business with John Lewis Partnership.

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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.

John Lewis Partnership

✓ We have auto-filled some information from your Public Profile.

Supplier Information

Home Help (UK)

* Charity Name

Home Help (UK)

10

Charity Registration Number

* Please enter a summary of the charitable activities carried out by your organisation

This grant will make a huge difference to the elderly in our area who need extra help to remain living at home

11

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

Country/Region United Kingdom

This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel Continue 15

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


17. Click **Save & Continue**


This screenshot shows the 'Legal Entity' setup page in Coupa. The form includes fields for 'Legal Entity Name' (Home Help UK), 'Country/Region' (United Kingdom), 'Type of Company' (Charity), and 'Board of Directors'. A red box labeled '16' highlights the 'Type of Company' field. To the right, a grey box contains a note: 'Conducting business in certain countries/regions requires your invoice to contain specific information about your company.' At the bottom right, there are 'Cancel' and 'Save & Continue' buttons, with a red box labeled '17' highlighting the 'Save & Continue' button.

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')

This screenshot shows the 'Which customers do you want to see this?' and 'What address do you invoice from?' sections. In the first section, both 'All' and 'John Lewis Partnership' checkboxes are selected, with a red box labeled '18' highlighting the 'John Lewis Partnership' checkbox. The second section contains fields for 'Address Line 1' (1 High Street), 'Address Line 2', 'City' (London), 'State', 'Postal Code' (N1 1NW), and 'Country/Region' (United Kingdom). A red box labeled '19' highlights the 'City' field. To the right, a blue box labeled 'REQUIRED FOR INVOICING' contains a note: 'Enter the registered address of your legal entity. This is the same location where you receive government documents.' At the bottom, there are two checkboxes: 'Use this address for Remit-To' and 'Use this for Ship From address', both of which are selected. A red box labeled '20' highlights the 'Use this for Ship From address' checkbox.

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:


Bank Account Currency:


Beneficiary Name:

Bank Name:

27 Account Number: 

Confirm Account Number:

Sort Code: 

SWIFT/BIC Code: 


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

Branch Code:

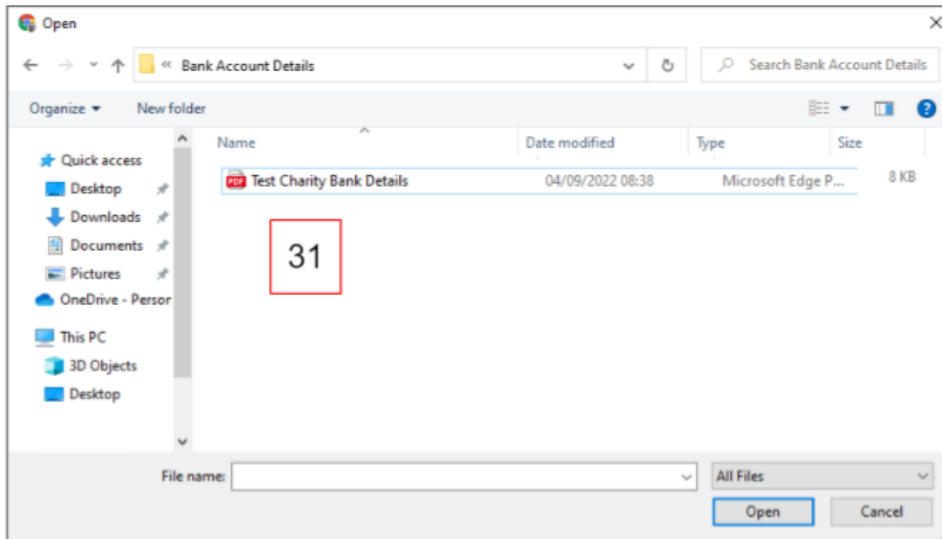
Bank Account Type: 29

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

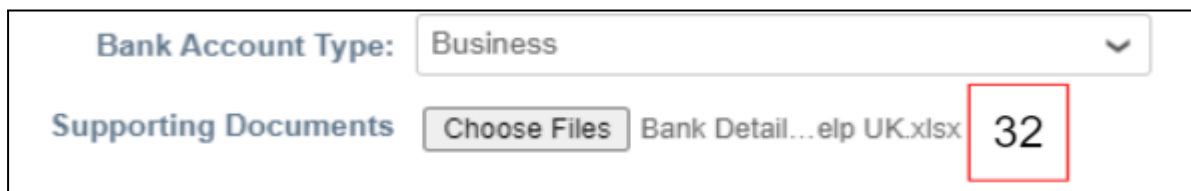
Bank Account Type:

Supporting Documents No file chosen 30 

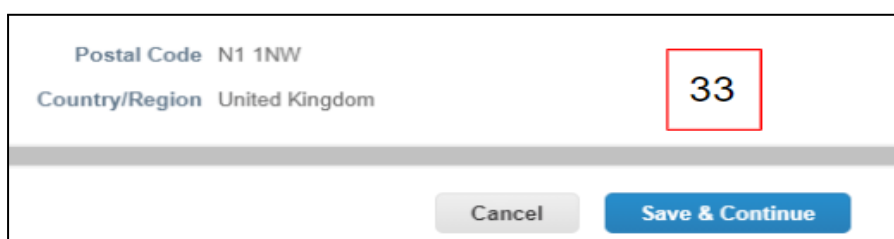
31. Locate where you have saved the file containing the **Bank Account** details and **double click** on the File Name



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**

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account HSBC Home Help UK *****5678 112233	1 High Street London N1 1NW United Kingdom	Active	Manage

Deactivate Legal Entity Cancel Next

35

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

Title	Status	
1 High Street London N1 1NW United Kingdom	Active	Manage

Deactivate Legal Entity Done

36

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

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

37

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' if none apply

Create Remit To

Charity Organisation Type

38

Bank Name

Bank Branch Name

- Environmental
- Arts & Culture
- Education
- Emergency Relief
- Social Welfare
- Health
- Other

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

Bank Details

Bank Name HSBC

Bank Branch Name HSBC Bristol

Bank Account Name Home Help UK

Bank Account Number *****678

Bank Country/Region United Kingdom

Sort Code ***233

Please enter bank branch number

39

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

Please attach proof of your Bank Account

Choose File No file chosen

40

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

Charity Address

* Address Line 1 1 High Street

* Address Line 2

Address Line 3

* City London

County

* Post Code N1 1NW

* Country/Region United Kingdom

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

* Country/Region United Kingdom

* Remittance email address

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

*** Charity Address**

Country/Region	United States	43
Address Name	Syrian Arab Republic	
Street Address	Taiwan	
Street Address 2	Tajikistan	
City	Tanzania, United Republic of	
State Region	Thailand	
Postal Code	Timor-Leste	
Location Code	Togo	
PO Box	Tokelau	
PO Box Postal Code	Tonga	
	Trinidad and Tobago	
	Tunisia	
	Turkmenistan	
	Turks and Caicos Islands	
	Tuvalu	
	Türkiye	
	Uganda	
	Ukraine	
	United Arab Emirates	
	United Kingdom	
	United States	

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

45. Click **Submit for Approval**

* Please tick to accept*: ☒ 44

You as the Charitable Organisation are solely responsible for ensuring that this information is, and remains, correct and up-to-date and for keeping this information secure.

John Lewis Partnership is not liable for any losses or damages incurred by the Charitable Organisation if the information is not correct or up-to-date (including if this results in delayed or failed payments to the Charitable Organisation), or if the information is misused by the Charitable Organisation or a third party.

For Internal Use Only

Before approving this form, please open the attached file and check that the bank details supplied match the details visible in this notification. Then, if satisfied to proceed, click the Edit button and select Yes in the Integrate field. Once both of these actions are complete, click Update.

Supplier Type Charity
Please ensure that the Supplier Type is Charity

Integrate None
Please ensure that Integrate is set to Yes

45

Decline Save **Submit for Approval**

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

Please fix the errors below

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](#)

Create Remit To

* Charity Organisation Type

Bank Details

* Bank Name

* Bank Branch Name
⚠ can't be blank

* Bank Account Name
⚠ can't be blank

* Bank Account Number ⓘ

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

John Lewis Partnership

Your information has been submitted

Charity creates/updates details

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Pending Approval

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.