

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 Community Based 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 **register** in Coupa. It is here where you enter all the details JLP needs to make its donation to you.

Important: Please use this guide to help you work carefully through completing the form in Coupa. Please note also that some questions appear more than once which can seem confusing. Please also ensure that every question marked * is completed as these questions are mandatory and if any are left blank, you won't be able to send the form back to us.

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

Please work **carefully** through every step in this guide:

Actions:

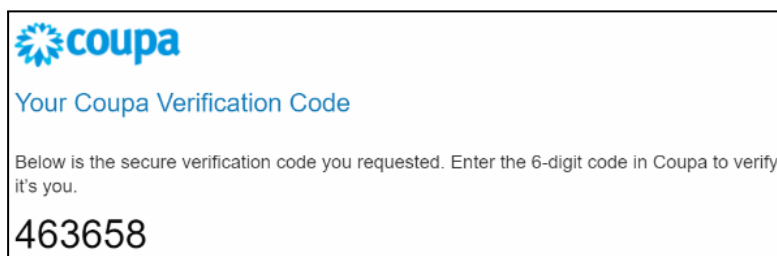
1. On receipt of the invitation email, click **Join and Respond**
2. Create a **Password** for yourself and **re-enter** this to **confirm**
3. Select your **Country/Region** - eg United Kingdom
4. Enter your **Tax Registration ID** - eg your VAT number

If you are **not** tax registered, **tick** the box 'I do not have a Tax ID' and enter a Reason - eg "Not registered"

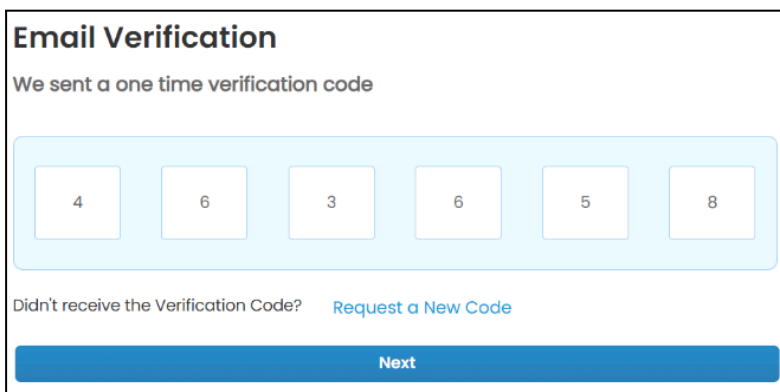
5. **Tick** to accept the **Privacy Policy** and **Terms of Use**
6. Click **Create an Account**

Next, you will be asked to verify your email account:

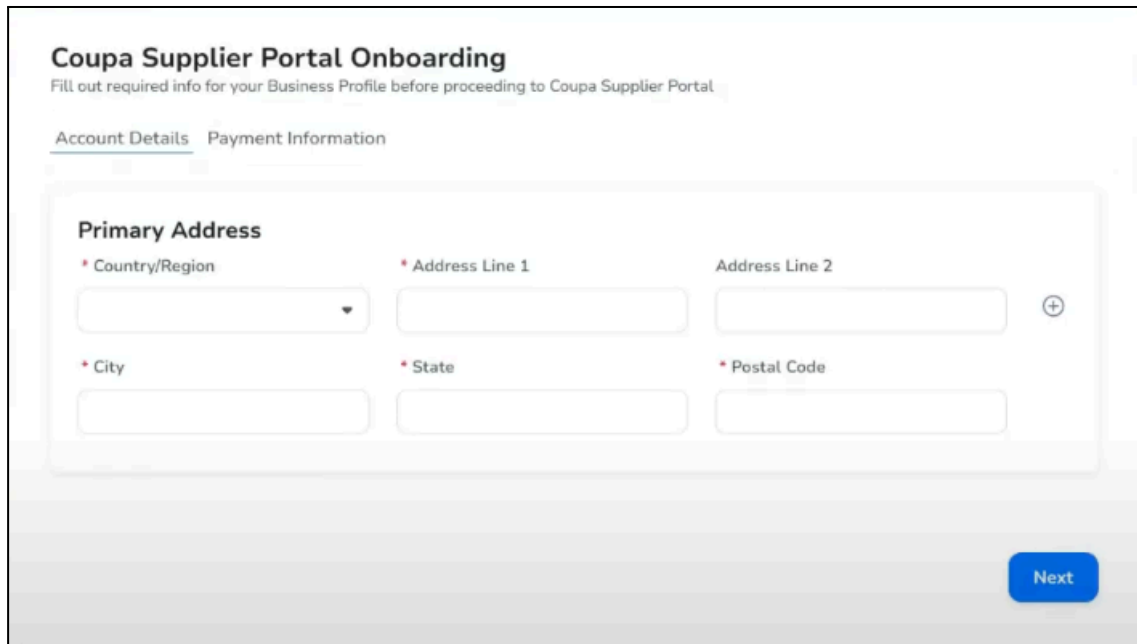
7. Return to your email and make a note of the **six digit code** emailed to you from Coupa:



8. **Enter the code** into the boxes as shown below and click **Next**:



9. Enter your **Primary Address** details:



Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details | Payment Information

Primary Address

* Country/Region | * Address Line 1 | Address Line 2 (+)

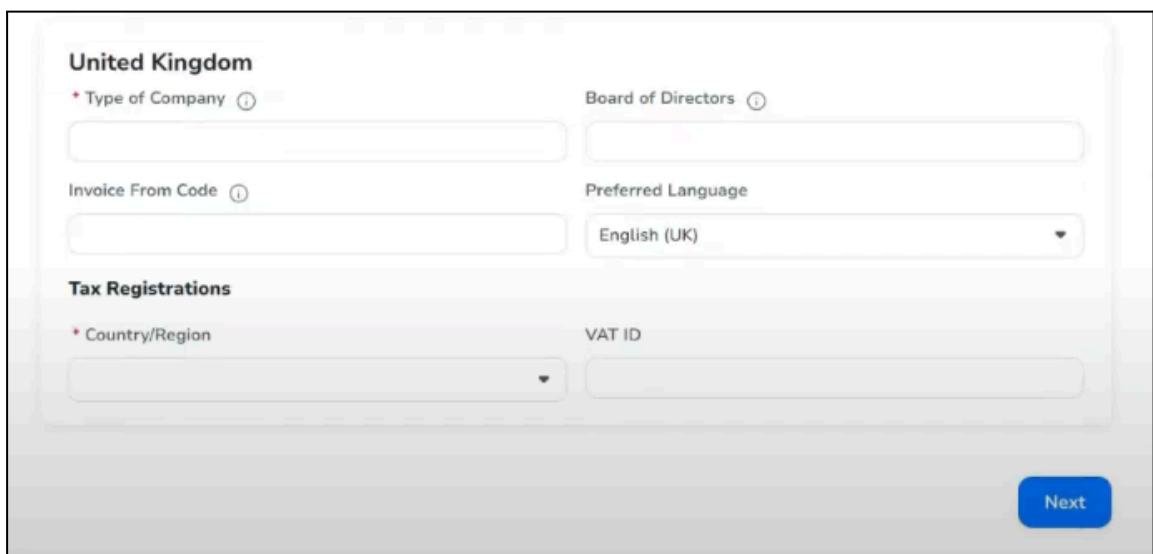
* City | * State | * Postal Code

Next

10. Scroll down and enter the **Type of Company** eg.. 'Charity'

11. Enter your **VAT ID** and **Country/Region**

If you are not tax registered, tick the box 'I do not have a VAT ID' and enter "**Not registered**" into **Local TAX ID**



United Kingdom

* Type of Company ⓘ | Board of Directors ⓘ

Invoice From Code ⓘ | Preferred Language

English (UK)

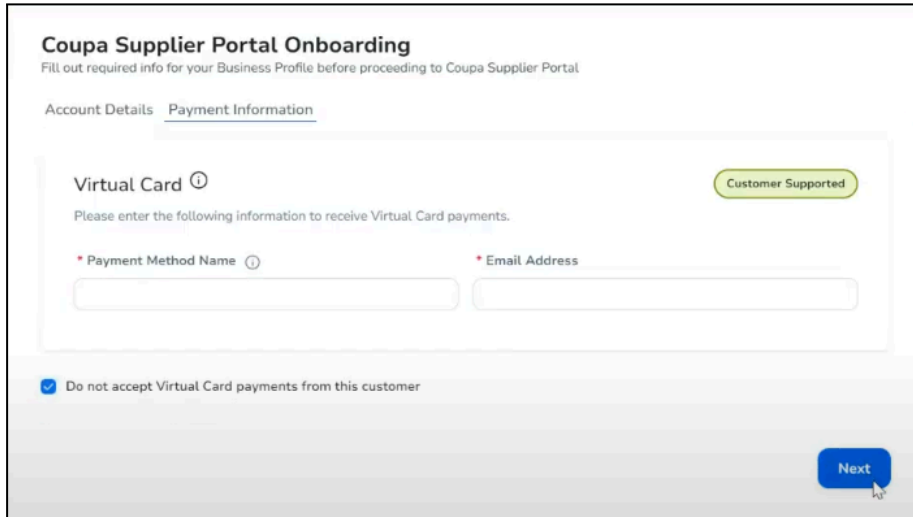
Tax Registrations

* Country/Region | VAT ID

Next

12. Click **NEXT**

13. **Tick 'Do not accept Virtual Card payments from this customer'**
14. Click **NEXT**



Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Virtual Card ⓘ Customer Supported

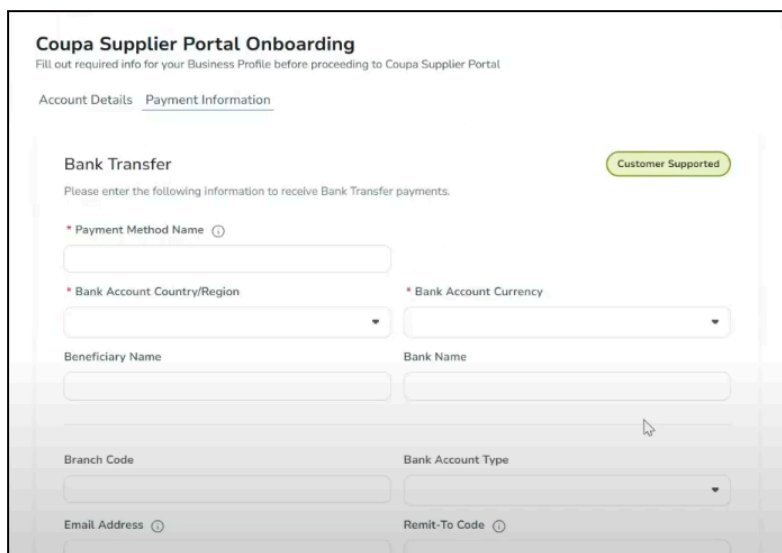
Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ * Email Address

☒ Do not accept Virtual Card payments from this customer

Next

15. On this **Bank Transfer** page, please enter your organisation's bank details



Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Bank Transfer ⓘ Customer Supported

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * Bank Account Currency

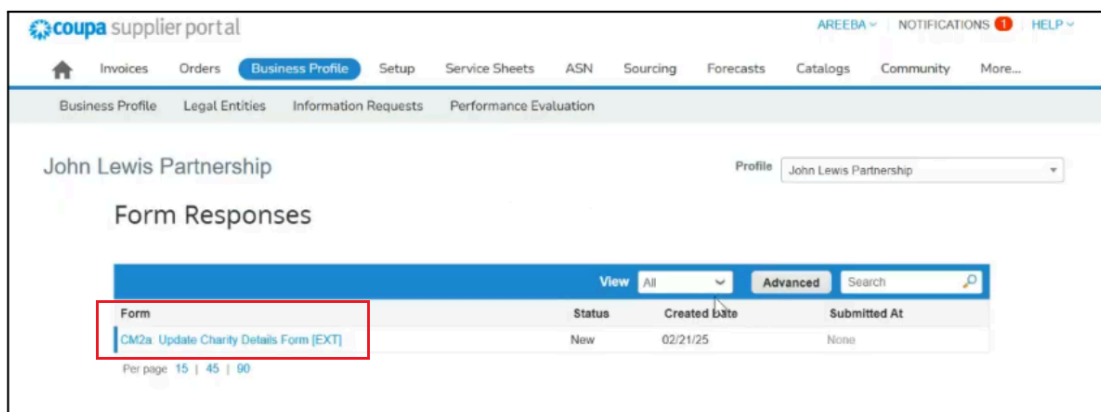
Beneficiary Name Bank Name

Branch Code Bank Account Type

Email Address ⓘ Remit-To Code ⓘ

16. **Payment Method Name:** Please choose an easy to remember 'nickname' for this payment method
17. Select the **Bank Account Country/Region**

18. Select **Bank Account Currency** - please only select GBP
19. Enter **Beneficiary Name** if applicable
20. Enter **Bank Name**
21. Enter the **Account Number** and **Confirm Account Number**
22. Enter **Sort code**
23. Leave **unticked** 'My company expects international payments'
24. Enter the **Branch Code** if applicable (optional)
25. Select **Business** for 'Bank Account Type'
26. Leave **Remit to Code** blank
27. Upload Supporting Documents, please click on **Browse** to upload a PDF or Photo of your most recent bank statement header, bank cheque or bank paying in slip
28. Please **DO NOT** tick **Do not accept Bank Transfers from this customer**
29. Click **Next**
30. On the next page scroll down and **Tick** - '**Do not accept Check payments from this customer**'
31. Click **Next**
32. On **Form Responses**, please click the most recent **CM2a** form link under the **Form** column:



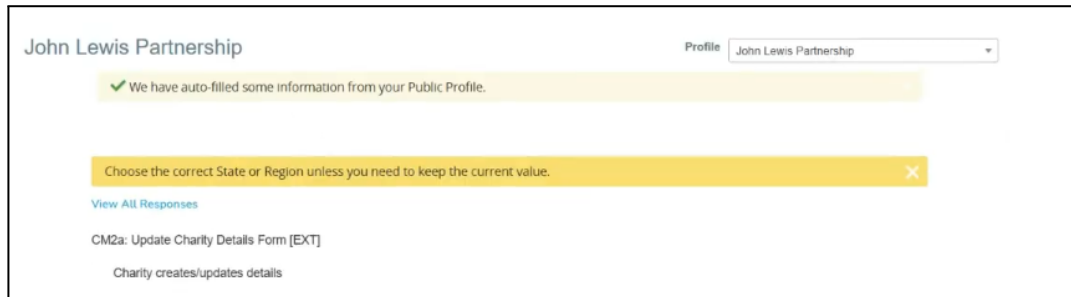
The screenshot shows the 'coupa supplier portal' interface. The 'Business Profile' tab is selected. Under 'Form Responses', there is a table with columns: Form, Status, Created date, and Submitted At. The first row shows 'CM2a: Update Charity Details Form [EXT]' in the 'Form' column, 'New' in 'Status', '02/21/25' in 'Created date', and 'None' in 'Submitted At'. A red box highlights the 'Form' column header and the first row.

Form	Status	Created date	Submitted At
CM2a: Update Charity Details Form [EXT]	New	02/21/25	None

33. You will then be taken to the John Lewis Partnership CM2a form.

Ensure the **Charity Name** is the same as **Supplier Information**.

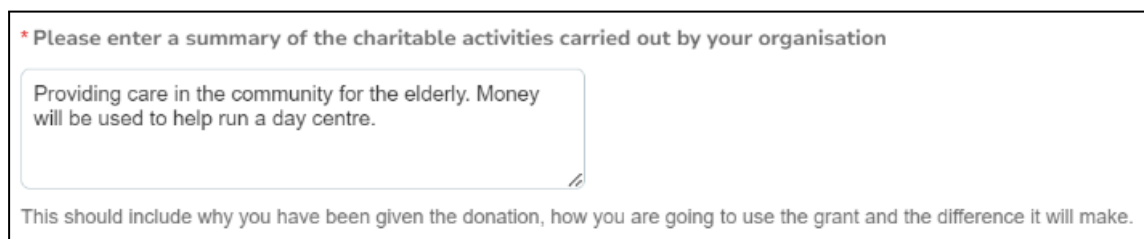
Note: If the names don't match the form will be returned to you for you to amend.



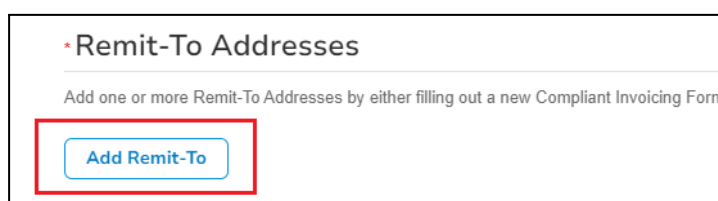
34. Enter your **Charity Registration Number** - or enter 'Not Registered' if you are not a registered charity

35. 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. For example:

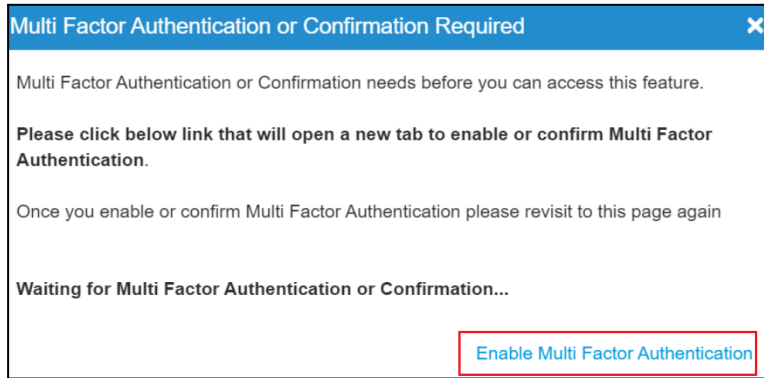


36. Next, click the **Add Remit-To** button

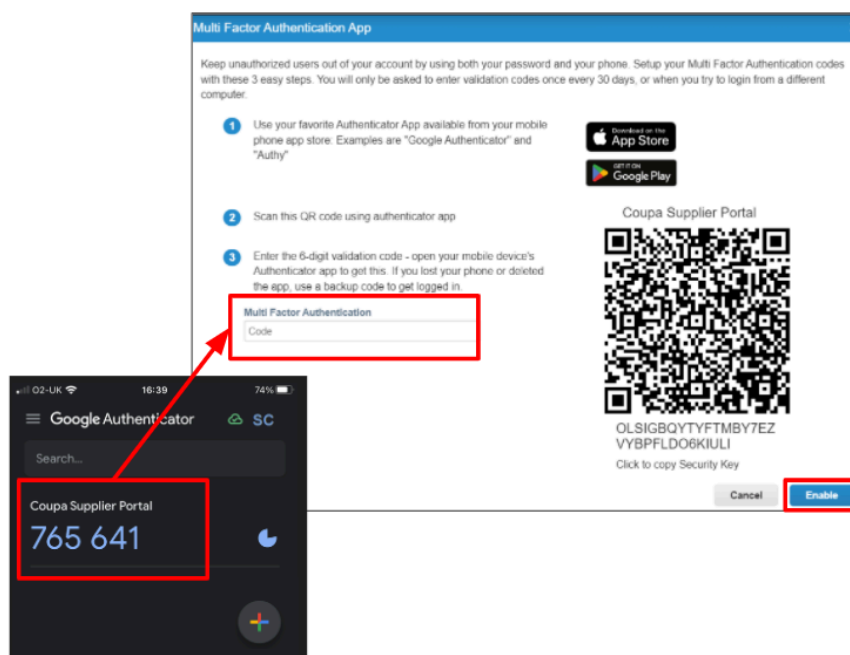


Next, you may be asked to set up **Multi Factor Authentication**. To do this, follow these bullet points and once complete, continue to Step 37

- Click on **Enable Multi Factor Authentication**



- Follow the on-screen instructions summarised here:
 - Using a mobile device, download an **Authenticator App** from your Google or Apple App Store
 - Open the App and **scan the QR Code** on screen
 - Enter the **Six Digit Code** from the mobile App into the Multi Factor Authentication box on screen (as shown below)
 - Click **Enable** to complete



- Once **Multi Factor Authentication** is successfully set up a set of six-digit backup codes are generated. Please save these codes using the **Download** or **Print** option. These codes can be used at a later date if access is lost to Coupa or the authentication app:

Save Your Backup Codes

Backup codes are the only way to restore access if you lose access to your authenticating phone or app.

Keep these somewhere safe but accessible

XxlXBQ	wWM3Xg
AfgffA	ViaBow
agBQsA	4kY4cA

You can only use each backup code once.

These codes were generated on May 25, 2023

Download
Print

Once this is done:

- Under **How would you like to be paid?**, select **Bank Transfers** and click the tick button next to your bank details and click **Add Selected**:

How would you like to be paid?

All Methods

Bank Transfers

Checks

Credit Cards

Add Payment Method

John Lewis Partnership prefers Credit Cards, Bank Transfers, Checks Payments.

Testing Changes Bank

1 Drummond Gate, Pimlico, London, London, SW1V 2QQ, United Kingdom

Account Number

****5678

Transit Code

123456

Wire Routing Number

☆ Customer Preferred

Cancel

Add Selected

Note: The John Lewis Partnership will **only** pay using **Bank Transfers** so please **do not** select any other option or your request will be cancelled and payment of your invoice will be delayed.

You are now taken back to the original form to complete a few more details.

38. Within **Create Remit To** choose the option that best describes your **Charity Organisation Type**. Select 'Other' if none apply:

*** Charity Organisation Type**

▼

Environmental
Arts & Culture
Education
Emergency Relief
Social Welfare
Health
Other

39. Next, scroll down the remainder of the form and enter details into any boxes marked ***** which are blank - eg **Bank Branch Name**, **Bank Account Name**
40. **Please attach proof of your Bank Account**, please click on **Choose File** to upload a PDF or Photo of your most recent bank statement header, black cheque or bank paying in slip:

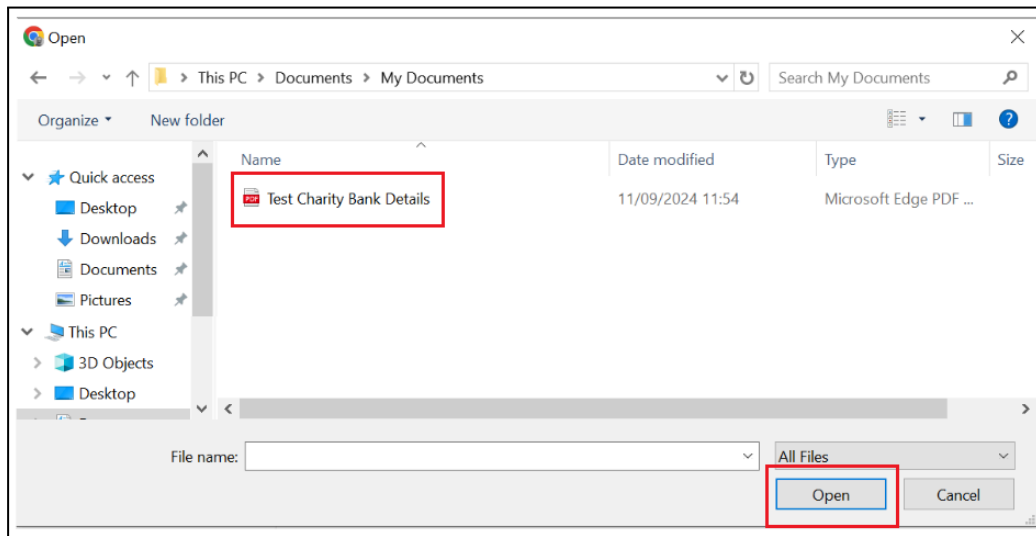
*** Please attach proof of your Bank Account**

Choose File

No file chosen

Please attach evidence of your organisation's business bank account. Either a scan or photo of a cheque, paying in slip or an extract of the heading on a bank statement is required. Files must be either PDF or an Image file

41. Locate where you have saved the file containing the **Bank Account** details, **click** on the File Name and then click **Open**



Note: JLP does **not** need to see any of your transactions, but **we do** need to see a formal bank document showing your **Account Name**, **Account Number** and **Account Sort Code**. JLP will use this information to verify that the payment it makes reaches the correct account safely.

42. Enter your **Remittance email address** - this is where a notification will be sent once payment has been made
43. Select the **Address Purpose** within the **Charity Address**
44. Add your **Work Contact Number** within the **Contact** section
45. In the dropdown select **Other**.

If you are entering a landline, please enter as below. Example number 0131 123 45 67.

1. Country/Region: 0044
2. Area/City: 0131
3. Local: 234567

If you are entering a mobile, please enter as below. Example number 07123456789

1. Country/Region: 0044
2. Local: 07123456789

Finally, scroll down and:

46. **Tick** the box to **accept** the statement starting “Supplier is solely responsible for ensuring.....”
47. Click **Submit for Approval** (see the section below on ‘Error Messages and Amendments’ if you get an error when submitting your form)
48. You will then be asked if you want to “Save this Information to Your Profile”. JLP recommends that you click **Yes, Save to Profile**
49. You should see a message confirming that “Your information has been submitted”

What happens next?

- On receipt of your submission, the John Lewis Partnership will check and approve the details, and raise a payment to you in due course. If we need to contact you, we will do this using the details you have supplied to us in this form.


Error Messages and Amendments:

You may see a message asking you to “Please fix the errors below”:

Please fix the errors below

Where this happens, it means one or more of the mandatory fields marked * is missing important information:

*** Branch Name**


 • can't be blank

Please scroll back through the form to enter the missing details. Once done, click **Submit for Approval** again (see step 47 above)

Note: Forms that are **Pending Approval** can be recalled for further editing or amendment by clicking the **Withdraw** option at the bottom of the page

Integrate

None

Please ensure that Integrate is set to Yes

Withdraw