

Click the link below to create your Stripe account:

<https://dashboard.stripe.com/register?redirect=%2Faccount%2Fonboarding>

The screenshot shows the 'Create your Stripe account' page. It has fields for Email, Full name, Country, and Password. The Email field contains 'Branch@pcuk.org'. The Full name field contains 'Branch Name'. The Country dropdown is set to 'United Kingdom'. The Password field is redacted. Below the password field, a note says 'Nice work. This is an excellent password.' There is a checkbox for 'Email me about product updates and resources.' and a 'Create account' button.

Once you have entered the Branch email address (branch@pcuk.org) the **Full Name** – this should be the Branch Name which is used on the Branch bank account and a **password**, you can then select **Create account**.

You will be asked to verify your email address; it will send an email to the Branch email to be verified. This email will be sent from - notifications@stripe.com

Once your account has been activated you will be asked to log in again, the following screen will show:

You will need to select '**Activate Payments**'

The screenshot shows the 'Activate payments on your account' page. It has two buttons: 'Activate payments →' and 'Skip for now'. Below the buttons, there are two sections: 'What information will I need?' and 'How long does it take?'. The 'What information' section says 'You'll be asked to provide standard business details, such as contact information and industry type.' The 'How long' section says 'Complete your business profile in 5-10 minutes, so you can take your first payment straight away.'

1. The type of business must be **Individual/Sole Trader**

X | Activate payments

The screenshot shows the Stripe account setup interface. On the left, a vertical navigation menu lists five steps: 1. Verify your business (Business type is selected), 2. Add your bank, 3. Secure your account, 4. Add extras, and 5. Review and finish. To the right, the main area has a heading "Let's start with some basics" and a sub-instruction "Choose your location and business type to get started." Below this, there are two dropdown menus: "Business location" set to "United Kingdom" and "Type of business" set to "Individual / Sole Trader". A large blue "Continue →" button is at the bottom.

1 Verify your business
• Business type
• Business details
• Fulfillment details
• Public details
2 Add your bank
3 Secure your account
4 Add extras
5 Review and finish

Let's start with some basics

Choose your location and business type to get started.

Business location

United Kingdom

Type of business

Individual / Sole Trader

Continue →

There will be just one name on the account so to ensure there is segregation of duty between administering the account and recording of information, the name on the Stripe account should not be the Treasurer so we would recommend that the account is set up in the name of the DC or another committee member not the Treasurer.

2. **Personal details:** You will be asked to enter the '**Legal Name**' first and last name, **DOB** and **Home address**. We recommend you add the DC or another committee member not the Treasurer.

X | Activate payments In progress

- 1 Verify your business
- Business type
- Personal details
- Business details
- Fulfillment details
- Public details
- 2 Add your bank
- 3 Secure your account
- 4 Add extras
- 5 Review and finish

Verify your personal details

Stripe collects this information to verify your identity and keep your account safe.

Legal name

First name

Last name

Email address

ellie.elkhamlich@pcuk.org

Date of birth

DD / MM / YYYY

Home address

United Kingdom

Address line 1

Address line 2

Town or City

Postal code

Phone number

GB +44 121 234 5678

Continue →

3.

4. **Business details:** Next you will need to select the 'Industry type', click on '**Membership Organizations**' and then select '**Charities or social service**

organizations' & continue.

X | Activate payments In progress

- 1 Verify your business
 - Business type
 - Personal details
 - **Business details**
 - Fulfillment details
 - Public details
- 2 Add your bank
- 3 Secure your account
- 4 Add extras
- 5 Review and finish

Tell us more about your business

Stripe collects this information to better understand and serve your business.

VAT number Optional

GB 123456789

Industry

Charities or social service organizations

Business website

www.example.com

Product description

Continue →

5. Fulfilment Details: Please select '**Within one day**' from the dropdown & **continue**

X | Activate payments In progress

- 1 Verify your business
 - Business type
 - Personal details
 - Business details
 - **Fulfillment details**
 - Public details
- 2 Add your bank
- 3 Secure your account
- 4 Add extras
- 5 Review and finish

Describe how you fulfill orders

In order to help Stripe keep your business compliant, we need to know a little bit more about how you provide goods or services.

On average, how long after paying will your customers typically receive their goods or services?

Within one day

Continue →

6. You will then be asked to enter the '**Statement Descriptor**' this should be the Branch Name & '**Shortened descriptor**'

Statement Descriptor = Your statement descriptor shows up on your customers' bank or credit card statements. It should be 5-22 characters

Shortened descriptor E.g Rallies/Events = You may provide more specific details about a charge with dynamic suffixes. When a suffix is used, it is combined with the shortened descriptor on card statements.

X | Activate payments In progress

1 Verify your business
Business type
Personal details
Business details
Fulfillment details
Public details
2 Add your bank
3 Secure your account
4 Add extras
5 Review and finish

Add public details for customers

This information may be visible in payment statements, invoices, and receipts.

Statement descriptor
Your business name
⚠ Please provide a statement descriptor.

Shortened descriptor
Business
⚠ Please provide a shortened descriptor.

Customer support phone number
UK +44 7954 390088

Continue →

Your statement descriptor shows up on your customers' bank or credit card statements. It should be 5-22 characters.

7. Bank Details: You will need to enter the Branch bank account details here

X | Activate payments In progress

1 Verify your business
2 Add your bank
Bank details
3 Secure your account
4 Add extras
5 Review and finish

Add your bank to receive payouts

A payout is the transfer of funds from Stripe to your bank account.

Currency
GBP - British Pound

Country of bank account
United Kingdom

Sort code
108800

Account number
00012345

Confirm account number
00012345

I, the account holder, am the only person required to authorise debits. By submitting a bank account, I authorise Stripe to transfer to and from this bank account through the Bankers' Automated Clearing Services (Bacs), protected by the Bacs direct debit guarantee, and confirm that I have read and agree to the Services Agreement, including the Bacs Direct Debit Instructions.

Continue →

- 8. Two-step authentication** - Stripe requires two-step authentication to keep your account secure. We would recommend selecting ‘**Use SMS**’ this will send a code to the mobile number you have entered.

The screenshot shows the Stripe account setup process at step 4, 'Add extras'. A sidebar on the left lists steps 1 through 5: Verify your business, Add your bank, Secure your account, Two-step authentication (which is bolded), Add extras, and Review and finish. The main content area is titled 'Keep your account secure' and explains the importance of two-step authentication for security. It offers three options: 'Use an authenticator app', 'Add a security key', and 'Use SMS', with 'Use SMS' highlighted by a yellow background. A large blue 'Continue →' button is at the bottom.

9. Tax Calculation – Select ‘No thanks’

The screenshot shows the Stripe account setup process at step 4, 'Add extras'. A sidebar on the left lists steps 1 through 5: Verify your business, Add your bank, Secure your account, Tax calculation (which is bolded), and Review and finish. The main content area is titled 'Automate VAT calculation' and discusses monitoring tax obligations and using Stripe Tax. It includes a section for 'Select your product category' with a dropdown menu set to 'General - Services'. A note states that this will only treat services as taxable if the jurisdiction taxes services generally. Another note says there's no charge until settings are finished. A large blue 'Continue →' button is at the bottom, and a yellow 'No thanks' button is also present.

10. Summary - Review and finish up

You're almost ready to start exploring Stripe. Take a moment to review and confirm your information. Then once you have reviewed your details you can select ‘**Agree & Submit**’ to finalise the process.

Please Note: When the account has been opened, the account is configured to ensure that payments are made automatically into the Branch bank account within the minimum time rather than the money sitting in the Stripe account. (With Paypal you have to withdraw the funds but with Stripe it can be set up to automatically pay into the relevant account).