

Background & Project Overview

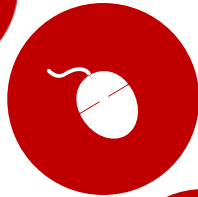
- Global approval in 2018 to implement Coupa as the chosen Global Purchasing and Invoice System ('P2P') system for Inchcape. The implementation has the Support of the Group Executive as well as local leaders
- It will support a number of measures to digitise and streamline our purchasing and invoicing processes, delivering improved efficiencies to both Inchcape and our Suppliers
- A Global design has been adopted to ensure consistency across Inchcape, with localisation where regulatory or cultural requirements dictate a tailored solution



Why Inchcape has chosen to implement Coupa



Coupa will allow Inchcape to spend smarter, in a more efficient way
POs will be raised BEFORE goods/services are delivered



Intuitive, guided buying to preferred suppliers,
online experience similar to shopping online.



Improved business practices and policies
Electronic invoicing and visibility for Inchcape and Suppliers



Streamlined and automated way of working, with upfront
approvals to control spend



Enhanced staff and supplier experience



Enriched quality data to inform procurement decisions



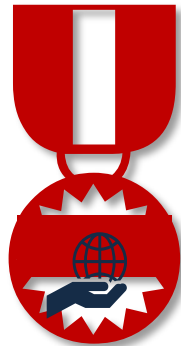
Bring Inchcape into line with similar FTSE 250 global business

What does this mean for you?

- You will start to receive POs from our Coupa system.
- Any Coupa PO which you receive **must** be invoiced electronically through Coupa against a valid Coupa PO number
- Any invoice relating to a Coupa PO which is not submitted on the portal will not be registered or reviewed – This will result in non-payment of that invoice

What's in it for you?

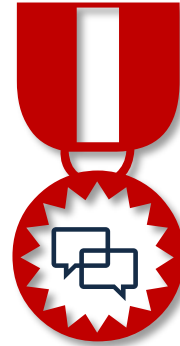
- Streamlined and efficient process - Moving away from paper and manual activities.
- Faster access to Purchase Orders – Quick & easy invoice creation
- Create more transparent relationships with you, our Suppliers – Easy access to the status of invoice payments via CSP
- Improve the invoicing process with a seamless electronic system that will reduce errors, resulting in faster invoice matching and approval of invoice for payment



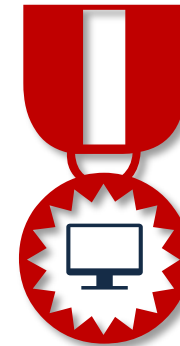
Greater control over
order processing



Ability to create
electronic invoices



Better communication
and visibility with
Inchcape
Real-time invoice status
information



No installation of hardware
or software required

...Best of all, it's free of charge! There is no cost for the supplier to transact through Coupa

Further Information

E-Mail:

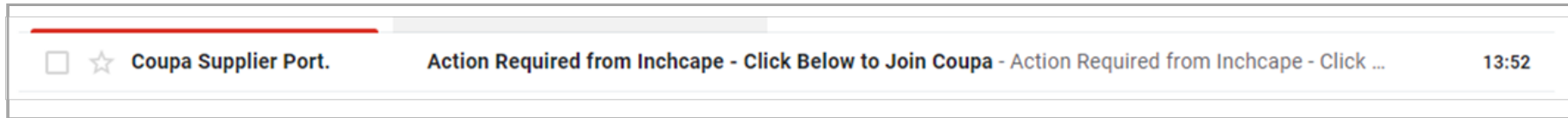
GlobalCoupa.Support@Inchcape.com

Coupa Website:

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

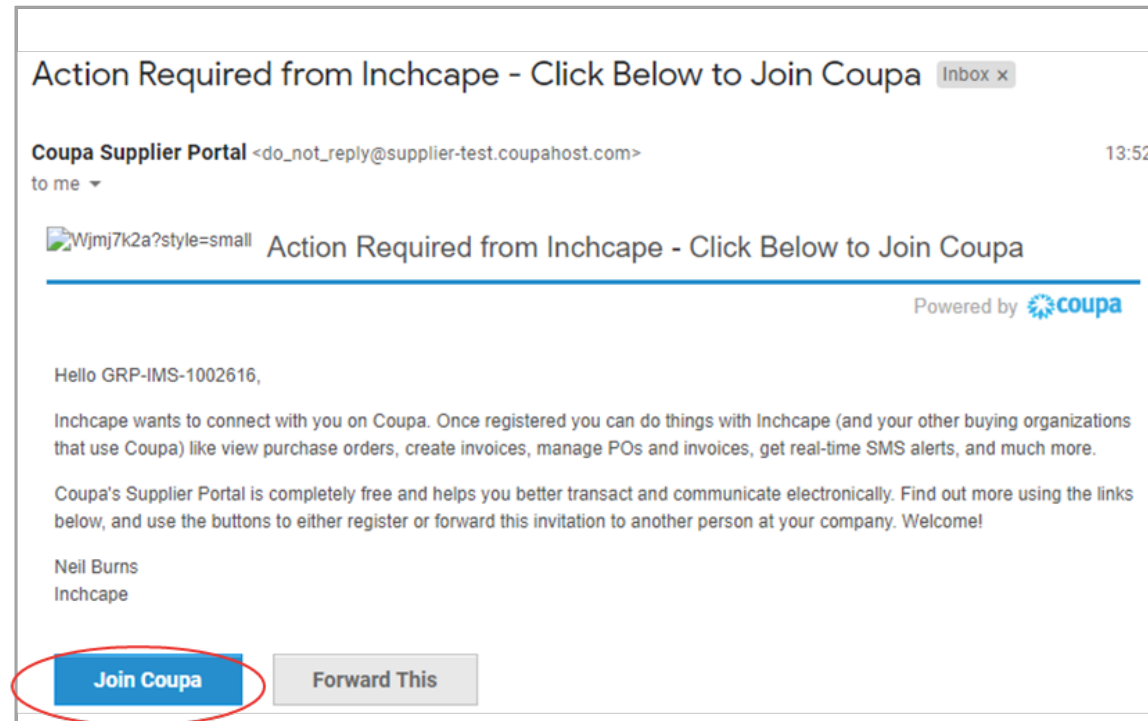
Registering with the CSP

- You will receive an automated invite to join the portal. The email is sent to the primary contact you've provided, if you would like this amending please send the alternative email address to GlobalCoupa.Support@Inchcape.com



The email is an action requiring you to register with the CSP

Click – Join Coupa



Registering with the CSP



Create your business account

Inchcape is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Inchcape so you're ready to do business together.

The email address field will be automatically populated

Create a password and re-enter it into the password confirmation box.

Tick the box to accept the Privacy Policy & Terms of Use then click get started.

The registration form consists of several fields and a button. The "Email" field is pre-filled with "joe [redacted]@gmail.com". The "Password" and "Password Confirmation" fields are highlighted in yellow. A red arrow points from the text "Create a password and re-enter it into the password confirmation box." to the "Password" field. Another red arrow points from the text "Tick the box to accept the Privacy Policy & Terms of Use then click get started." to the checkbox. The "Get Started" button is also circled in red.

Email

Password

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

Password Confirmation

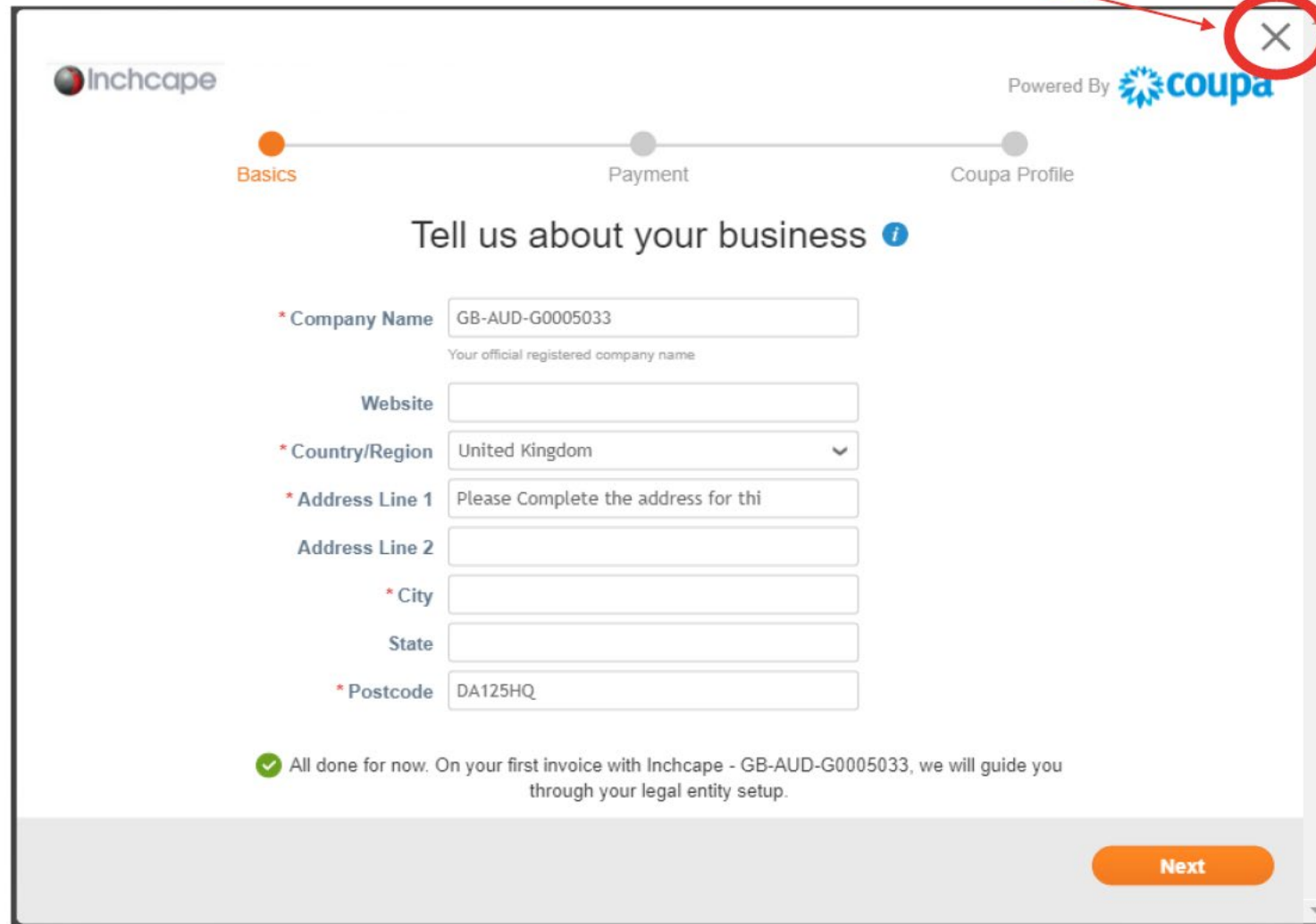
I accept the [Privacy Policy](#) and the [Terms of Use](#).


[Having an issue with signup?](#)

[Forward this to someone](#)

Registering with the CSP

You will be taken into the portal automatically, click on the cross on the below screen



Inchcape Powered By 

Basics Payment Coupa Profile

Tell us about your business i

* Company Name
Your official registered company name

Website

* Country/Region v

* Address Line 1

Address Line 2

* City

State

* Postcode

✔ All done for now. On your first invoice with Inchcape - GB-AUD-G0005033, we will guide you through your legal entity setup.

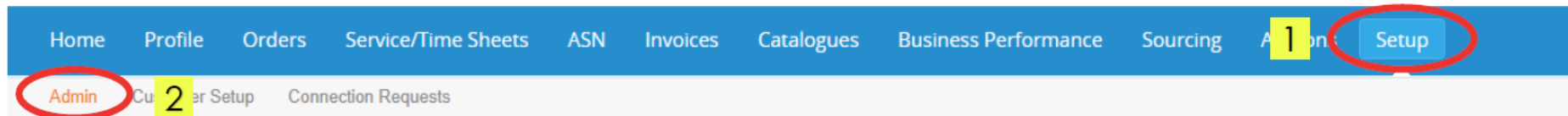
[Next](#)

Setting up your legal entity

The next step is to setup your legal entity

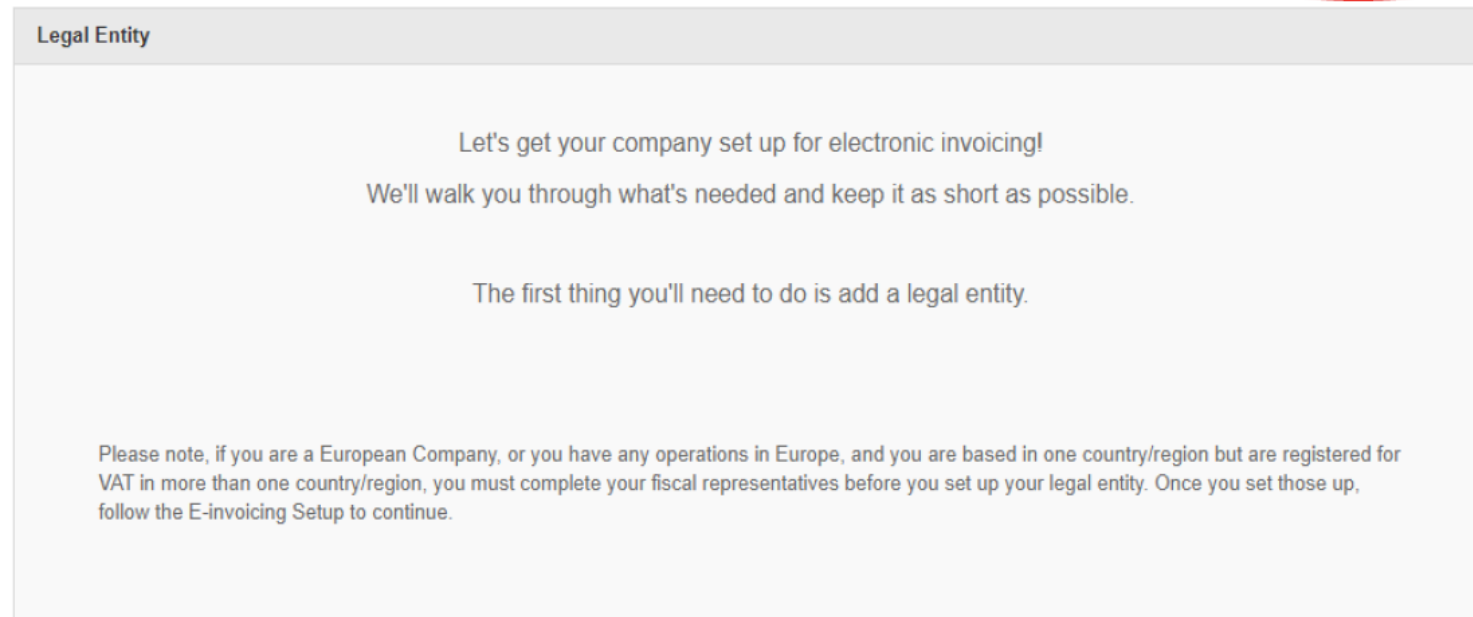
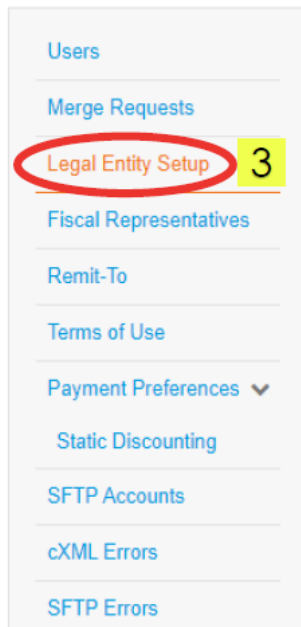
1. Go to the Setup tab
2. Choose The Admin section
3. Choose Legal Entity setup
4. Click Add Legal entity

Please note, all data used in the Legal Entity pages will pull through to the legal invoice Coupa creates so it must be accurate.



Admin Legal Entity Setup

4 Add Legal Entity



Setting up your legal entity

Add your Legal Entity name and choose your Country

Where's your business located? ×

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name
Country

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

Cancel **Continue**

Miscellaneous Information ×

1 2 3 4

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

* Type of Company

Board of Directors

Conducting business in certain countries requires your invoice to contain specific information about your company.

Cancel **Save & Continue**

Add your type of company. E.g. Accounting, Consulting, Parts Supplier etc.

You don't need to add Board of Directors so you can skip this part.

Setting up your legal entity

1. Make sure “**ALL**” is ticked so you can view all of the Inchcape entities
2. Insert your registered Office Address
3. Make sure both boxes are ticked – This will save you from having to enter your address multiple times.

Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

- 1 All
 Inchcape

What address do you invoice from?

* Address Line 1

Address Line 2

2 * City

State

* Postal Code *i*

Country United Kingdom

- 3 Use this address for Remit-To *i*
 Use this for Ship From address *i*


REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

Setting up your legal entity

Vat Registered? If you are VAT registered enter you VAT number here, you need to add **GB** before the number for it to register.


What is your Tax ID? 


Country/Region 

* VAT ID

I don't have a VAT/GST Number

Not Vat Registered? If you are not VAT registered tick the ox next to I don't have a VAT/GST Number. The field that appears below is a required field so enter **0000** to move to the next step

What is your Tax ID? 

Country/Region 

VAT ID

I don't have a VAT/GST Number

* Local Tax ID


Setting up your legal entity

Please **DO NOT** add any banking information. This information is held by Inchcape in their ERP system and not held in Coupa. For any amendments, please contact Inchcape directly.

On this page if you choose Address as the payment type, this will mean you do not have to enter any bank details. Remittances will continue to be emailed to you as normal.

Where do you want to receive payment? ×

1 2 3 4

* Payment Type Address 

Note: If you have added bank details they are secure this step is just to prevent extra work

What is your Remit-To Address?

Address Line 1 23 Sandancer Lane

Address Line 2 Tyne Bridge

City North East

County

Post Code NE1 4ST

Country/Region United Kingdom

Cancel Save & Continue

Setting up your legal entity

Payments will continue to be made via your bank account, Coupa will not change the payment process.

x

Where do you want to receive payment?

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	Banking information	Status	
77 North Road Bristol BS16 5LU United Kingdom	None	Active	<button>Manage</button>

Deactivate Legal Entity Cancel **Next**

Setting up your legal entity

If the address where you ship goods from is different to your registered office address you can add a separate ship to address if required.

For example, if you are registered in the UK but ship goods from China, this may be required to be stated on the invoice as it may have tax implications.

×

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
77 North Road Bristol BS16 5LU United Kingdom	Active	Manage


Deactivate Legal EntityDone

Setting up your legal entity

Setup is now complete!!!

Setup complete ×

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

To get paid – Most customers require that you send them this payment info in **in addition to providing it on the invoice.** [i](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#) [Done](#)

Setting up your legal entity

Once saved, you'll now see your legal entity. If you've made an error, click on "Actions" then click "Deactivate legal entity" and start again. You cannot edit once saved. Additionally, under actions you can "Manage" which allows you to open the legal entity details to other Coupa customers or to add Remit and Ship From addresses

Admin Legal Entity Setup

Add Legal Entity

Users	Legal Entity			
Merge Requests	CTS test Actions			
Legal Entity Setup	Invoice From	Remit-To Accounts	Locations	Customers
Fiscal Representatives	Level 2, 4 Burbank Place Baulkham hills New south wales NSW 2153 Australia	Address Remit-To Address Level 2, 4 Burbank Place Baulkham hills New south wales NSW 2153 Australia Active	1 customer	Level 2, 4 Burbank Place Baulkham hills New south wales NSW 2153 Australia Inchcape
Remit-To	Test Australia Actions			
Terms of Use	Invoice From	Remit-To Accounts	Locations	Customers
Payment Preferences	33 IAL Lane SYDNEY	Address	0 customers	33 IAL Lane SYDNEY
Static Discounting				
sFTP Accounts				
cXML Errors				
sFTP File Errors (to Customers)				

Chat with Coupa Support

Important information

- Please ensure you set up your legal entity correctly. It's extremely important this is correct as it will be visible on all Coupa generated invoice.
- If you are having issues with set up of your profile please contact GlobalCoupa.Support@Inchcape.com

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right side of the navigation bar, there are links for 'FIRST', 'NOTIFICATIONS' (with a red badge showing '7'), and 'HELP'. Below the navigation bar is a blue header with a menu of options: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The main content area features a 'New' announcement about exclusive discounts. Below this is a 'Recommended' section with a 'Profile Progress' indicator (5 icons, 4 filled), 'Last Updated' information ('about 10 hours ago'), and an 'Improve Your Profile' button. The 'Profile Summary' section contains three cards: '2 Legal Entities' (with a 'View' link), '1 Registered User' (with a 'View' link), and '1 Connected Customer'. Below these cards are four tags: 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The bottom left corner displays the ID 'AU-IAL-803530'. On the right side, there are sections for 'Announcements', 'One-Click Savings', and 'Merge Accounts' (with a 'Request Merge' button). At the bottom right, there is a 'Chat with Coupa Support' button.

coupa supplier portal

FIRST | NOTIFICATIONS 7 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress: 5 icons (4 filled) | Last Updated: about 10 hours ago | [Improve Your Profile](#)

Profile Summary

- 2 Legal Entities [View](#)
- 1 Registered User [View](#)
- 1 Connected Customer

Banking Info | Diversity | Accelerate | Bribery Policy

AU-IAL-803530

Announcements

[View All \(0\)](#)

One-Click Savings

[View All](#)

Start saving today!
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

If your company has multiple CSP accounts, merge them to reduce confusion for your customers. [Learn more](#)

[Request Merge](#)

Latest Customers

Inchcape

[Chat with Coupa Support](#)

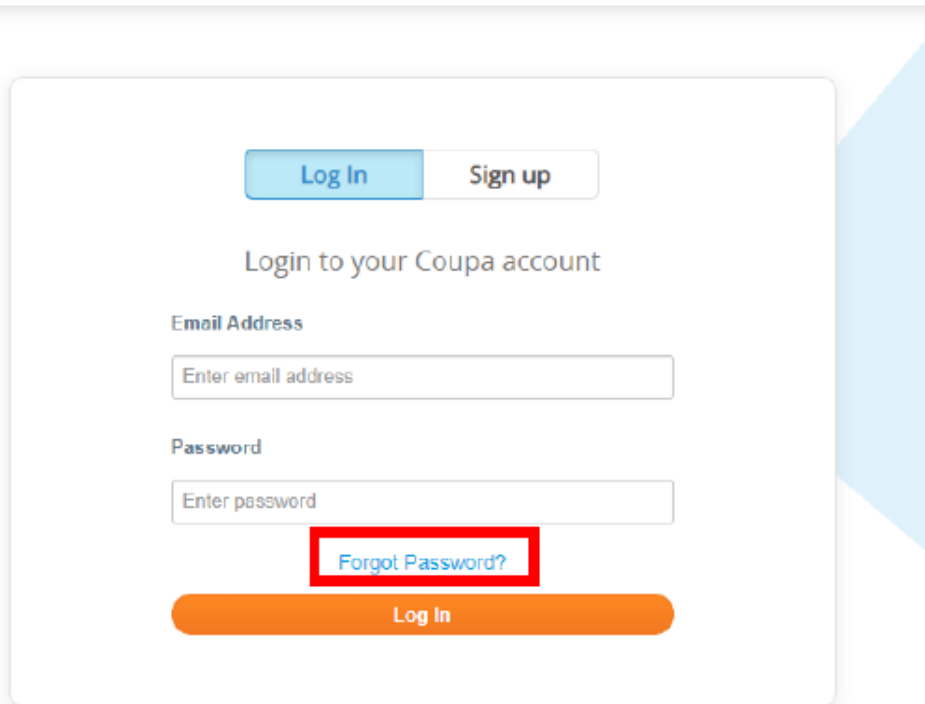
Signing into CSP

This is the link to the Inchcape Coupa Portal <https://supplier.coupahost.com/sessions/new>.

Use your email address that the invite was sent to and the password you created when joining. If you have forgotten your password you can click the “Forgot Password” link please remember to use the email address you joined the portal with when requesting a new password.

Note: Inchcape are not able to provide you with your password or create you a new one. This is done by Coupa.

 coupa supplier portal



[Log In](#) [Sign up](#)

Login to your Coupa account

Email Address

Password

[Forgot Password?](#)

[Log In](#)

Not showing customer – help

If you are not showing any customers in your portal

1. Go to the Setup tab
2. Choose The Admin section
3. Choose Legal Entity setup
4. Click the blue Actions button

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is identified as JOANNE, with a notifications icon showing 0 and a help dropdown. The main navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, and a highlighted 'Setup' button (1). Below this, the 'Admin' section (2) is selected, containing 'Legal Entity Setup' (3) and 'Connection Requests'. The 'Legal Entity Setup' page shows a table for 'Legal Entity' with one entry: 'Motors Ltd' (4). The 'Actions' button for this entry is circled in red. A dropdown menu for 'Actions' is shown below, with 'Manage Legal Entity' highlighted in yellow. A red arrow points from the 'Actions' button in the table to the dropdown menu. The text 'Select Manage Legal Entity' is written below the dropdown menu.

Legal Entity Setup

Invoice From	Remit-To Accounts	Locations	Customers
23 Sandancer Lane Tyne Bridge North East NE1 4ST United Kingdom	Address Remit-To Address 23 Sandancer Lane Tyne Bridge North East NE1 4ST United Kingdom Active	23 Sandancer Lane Tyne Bridge North East NE1 4ST United Kingdom	0 customers

Actions

- Manage Legal Entity
- Manage Remit-To Accounts
- Deactivate Legal Entity

Select Manage Legal Entity

Not showing customer – help

1. Click Continue on the first page.
2. Make sure “All” is ticked then scroll to the bottom of the page and click “Continue!”
3. You can continue to click the Blue button at the bottom right of each screen until all pages are completed.

2

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

- All
- Inhcaped - GB-HO-G0005030
- Inhcaped - GB-PROP-G0005030
- Inhcaped - GB-AUD-G0005030
- Inhcaped - GB-POR-G0005030
- Inhcaped - GB-BMW-G0005030
- Inhcaped - GB-VWG-G0005030
- Inhcaped - GB-JLR-G0005030
- Inhcaped - GB-MERC-G0005030
- Inhcaped - GB-TOYLEX-G0005030

Deactivate Legal Entity Cancel **Continue**

1

Miscellaneous Information

1 2 3 4

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

Company Name JP Motors Ltd 2
Country/Region United Kingdom
Type of Company Motor
Board of Directors

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Deactivate Legal Entity Cancel **Continue**

4. You should now see “9” customers connected to your legal entity

Invoice From	Remit-To Accounts
23 Sandancer Lane Tyne Bridge	Address 4 9 customers
	Remit-To Address 23 Sandancer Lane

How to raise an invoice





CREATING AN INVOICE – PO FLIP

1. Select the Inchcape Entity/ Brand you need to raise an invoice against. You do this by selecting from the “Select Customer” Drop Down Box.
2. Find from the list the Purchase Order you wish to invoice against
3. Click on the Gold Coins Icon – this takes you to the create an Invoice Page (see page 3)
4. The Red Coins Icon is for raising a credit note.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, it shows 'DAVE' with a dropdown arrow, 'NOTIFICATIONS 3', and 'HELP'. Below this is a main navigation bar with tabs: Home, Profile, Orders (highlighted), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Underneath, there are sub-tabs: Orders (highlighted), Order Lines, Order Changes, and Order Line Changes.

In the main content area, there is a 'Select Customer' dropdown menu with 'Inchcape' selected. A yellow '1' is placed next to it. To its right is a 'Configure PO Delivery' button.

Below this is the 'Purchase Orders' section. It contains a search bar with the text 'Click the Action to Invoice from a Purchase Order'. Below the search bar is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. A yellow '2' is placed to the left of the first row. A yellow '3' is placed to the right of the first row. A blue arrow points from the 'Gold Coins' icon in the 'Actions' column of the first row to the 'Select Customer' dropdown menu.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
GRP00002803	09/09/19	Issued	09/09/19	100 Days of Accounting Services - Coupa Project	No	100,000.00 GBP	 
GRP00002802	09/09/19	Issued	None	10 Days of Accounting Services	Yes	10,000.00 GBP	 

How to raise an invoice

THIS IS THE CREATE AN INVOICE PAGE

Section 1

1. Add an Invoice Number
2. Change the Invoice Date – **Please ensure this is changed to the the Tax date of the invoice, do not leave as the submission date as this will cause delay's to your payments**

Create Invoice Create

General Info

* Invoice # **1**

* Invoice Date **2**

Payment Term Z060_Payment due 60 days from the date of invoice

Date of Supply

* Currency

Delivery Number

Status Draft

Image Scan

Supplier Note

Attachments | [URL](#) | [Text](#)

From

* Supplier

* Supplier VAT ID

* Invoice From Address
77 North Road Accountancy
Bristol
BS16 5LU
United Kingdom

* Remit-To Address
77 North Road
Bristol
BS16 5LU
United Kingdom

* Ship From Address
77 North Road
Bristol
BS16 5LU
United Kingdom

Section 2

1. Check the quantity and net value is correct
2. Select your VAT rate
3. Click Calculate to work out the VAT element of the Invoice
4. Click Submit - Invoice Completed

Lines

Type	Description	Qty	UOM	Price	
Accounting Services		100.0	Days	1,000.00	100,000.00

1

PO Line Contract

Supplier Part Number

Tax Code Default

Billing

Taxes

VAT Rate	VAT Amount	Tax Reference
2 <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Totals & Taxes

Lines Net Total	100,000.00
Lines VAT Totals	0
<hr/>	
Total VAT	0.00
Net Total	100,000.00
Gross Total	100,000.00

3 **4**

Adding additional users

Inchcape are only able to setup one user on your portal, this person becomes the admin for your portal automatically.

If you want to add new users, click on the Setup tab then Users.

coupa supplier portal JOANNE ▾ | NOTIFICATIONS **1** | HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons **Setup**

Admin Customer Setup Connection Requests

Admin Users

Users **Invite User**

Users	Permissions	Customer Access
Joanne Paterson joanne.paterson@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogues Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Inchcape - GB-AUD-G0005030 Inchcape - GB-BMW-G0005030 Inchcape - GB-HO-G0005030 Inchcape - GB-JLR-G0005030 Inchcape - GB-MERC-G0005030 Inchcape - GB-POR-G0005030 Inchcape - GB-PROP-G0005030 Inchcape - GB-TOYLEX-G0005030 Inchcape - GB-VWG-G0005030

Left sidebar menu items: Merge Requests, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences ▾, Static Discounting, SFTP Accounts, cXML Errors, SFTP Errors

Adding additional users

Add the new users name and email address

You can choose the permissions you'd like them to have. We advise you choose at least one other person in your company to have admin access, this will prevent any issues in the future.

Click the send invitation button.

The person you have added as a user will receive an invitation to join your companies portal.

Additional users will not need to complete any of the setup or the legal entity as you are inviting them to join your companies Coupa portal which is already setup. Please note only users with admin access can add/ remove legal entities.

Invite User ×

First Name

Last Name

* Email

Permissions i

- All
- Admin
- Orders
 - Restricted Access to Orders
 - All
- Invoices
- Catalogues
- Profiles
- ASNs
- Service/Time Sheets
 - Restricted Access to Service/Timesheets
 - All
- Payments
- Order Changes
- Pay Me Now
- Business Performance
- Sourcing

Customers

- All
- Inchcape - GB-HO-G0005030
- Inchcape - GB-PROP-G0005030
- Inchcape - GB-AUD-G0005030
- Inchcape - GB-POR-G0005030
- Inchcape - GB-BMW-G0005030
- Inchcape - GB-VWG-G0005030
- Inchcape - GB-JLR-G0005030
- Inchcape - GB-MERC-G0005030
- Inchcape - GB-TOYLEX-G0005030

Cancel

Types of invoices

The screenshot displays the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Invoices' section is active, showing a 'Select Customer' dropdown set to 'Inchcape'. Below this, the 'Create Invoices' section features four buttons: 'Create Invoice from PO' (circled 1), 'Create Invoice from Contract' (circled 2), 'Create Blank Invoice' (circled 3), and 'Create Credit Note' (circled 4). A table below shows a list of invoices with the following data:

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
None	09/06/22	Draft	None	0.00 AUD	No		
testcn08062022-1	08/06/22	Approved	AU00008830	-10.30 AUD	No		
test08062022-1	08/06/22	Approved	AU00008830	238.85 AUD	Yes	Price different from PO/Contract or Catalog	

1. Create Invoice from PO option you can use for creating invoices against POs received from the customer.
2. Create Invoice from Contract can be used against Invoice-to-Contract type of Invoices.
3. Create Blank Invoice can be used for Non-PO-backed and Non-contract backed invoices.
4. Create Credit Note option can be used for creating credit notes against dispute invoices, incorrect invoices etc.