



Description	Instructions to setup CSP account, Receive Orders and Submit Invoices and Credit Notes
Audience	Inchcape Suppliers

# Instructions

# Setup CSP Account

- 1. Select Setup tab, Admin tab, select Legal Entity Setup from side menu
- 2. Click Add Legal Entit

Trome.	ordero ocriteri					
Add-ons Setup						
Admin Customer Se	etup Connection Reque	sts				
Admin Legal B	Entity Setup					Add Legal Entity
Users	Legal Entity					
Merge Requests	> Lithuania Te	est				Actions -
Legal Entity Setup	Invoice From	Remit-To Ac	counts	Locations	TAX IDs	Customers
Fiscal	Konstitucijos pr.	Address	1 customer	Konstitucijos pr.	LT999999999	Inchcape
Representatives	21B, 08130	Remit To	Konstitucijos	21B, 08130		
Remit-To	Vilnius 01107	Address	pr. 21B,	Vilnius 01107		
Terms of Use	Lithuania		Vilnius	Lithuania		
Payment			01107			
Preferences 🗸			Active			

### NOTES

- You can deactivate a legal entity by selecting Deactivate Legal Entity from the Actions drop-down. Relevant for mkistakes
- You cannot edit information once saved – mistake = deactivate and set up correct legakl entity
- All data used in the Legal Entity pages will be included in invoices created in Coupa

# Create an Invoice from Purchase Order

- 1. From the homepage, open the **Orders** tab.
- 2. Select Inchcape on the Select Customer dropdown menu.
- 3. Locate the relevant PO and click the **Gold Coins** icon.

Home	Profile	Orders	Service/Time Sh	eets ASN	Invoices	Catalogs	Business Pe	erformance	Sourcing	
Add-ons	Setup									
Orders	Order Lines	Returns	Order Changes	Order Line Chan	ges Order	Header Confirm	ations Shipm	nents		
Purch	ase Or	ders			Si	elect Customer	Inchcape			·
			Click the 💐	Action to In	voice froi	n a Purchas	se Order			
Export to	×					View All		✓ Si	earch	₽
PO Numbe	r Order Date	Status	Acknowledged At	Items	_	Unanswere	d Comments	Total	Assigned To	Actions
LT0000493	6 01/26/23	Issued	None	100 Each of Tes	st	No		1,000.00 EUR		
	C	reate	e Invoice	<b>e</b> Create			ł.			
	{Q	Gen	ieral Info				- 61			
		_	* Invoice #							
		*1	nvoice Date 02/	03/23 🛗	1		- 60			

### NOTES

The invoice date must be the same as the tax date of the invoice. Do not leave it as submission date as it will cause delays to your payments





- 4. Complete the relevant fields and click **Calculate** to work out the VAT element of the invoice
- 5. Click **Submit**

Гуре	Description	Qty	MOU	Price	1 000 00 8
<u>e</u>	Test	100	Each 🗸	10.00	1,000.00
PO Line LT000048	936-1	Service/Time Sh None	eet Line Cor	ntract	Supplier Part Number
Tax Code None	e Default	Vehicle Identifica None	tion Number (VIN)		
Billing K-302320	4011821115				
Taxes					
VAT Ra	ate	VAT Amount	Tax Reference		
	~	0.00			
Add Line	Pick lines from	Contract	Totals & Ta	axes	
			Lines N Lines V	et Total AT Totals	1,000.00
			Total VA	λŢ	0.00
			Net Tota	al	1,000.00
			Gros	is Total	1,000.00
				Court Court of Court of Court	Draft Calculate Submit
			Delete	Cancel Save as	Galculate

### **Raise Credit Note**

1. Go to **Orders** tab from Home Page, locate the PO and click on **Red Coins** icon against it

Purcha	ase Or	ders						
			Click the 📒	Action to Invoice from	a Purchase Order			
Export to	-				View All	<b>√</b> S	Search	₽
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
LT00004936	01/26/23	Issued	None	100 Each of Test	No	1,000.00 EUR		8: Se
						000 00 EUD		





2. Complete the mandatory fields, **Credit Note #**, **Credit Note Date**, **Original Invoice #** and **Original Invoice Date**, **currency** fields

Create Cred	it Note Create
🔅 General Info	C
* Credit Note #	
* Credit Note Date	03/23/23
Payment Term	Z000_Payable immediately Due net
Original Date of Supply	03/23/23
* Currency	EUR 🗸
Delivery Number	
Status	Draft
* Original Invoice #	
* Original Invoice Date	mm/dd/yy
Image Scan	Choose File No file chosen
Image Scan	Choose File No file chosen

3. Fill the relevant fields, Click **Calculate** to work out the VAT element of the invoice

4.	CI	ick	Sι	Jþ	mì	Í

Ture Ture	Description	05-	11014	Deine			•
iype g	Test	-100.0	Each	Price	10.00	1,000.00	ø
PO Line LT0000493	6-1	Service/Time She None	eet Line	Contract		Supplier Part Number	
Tax Code E None	Default	Vehicle Identifica None	tion Number (VI	N)			
Billing K-30232040	011821115						
Taxes							
VAT Rat	e	VAT Amount	Tax Reference	e			
	~	0.00					
Add Line	Pick lines from	Contract	In	tals & Taxes			
				Lines Net Total Lines VAT Totals		1,000.00 0	
				Total VAT		0.	.00
				Net Total		1,000.	00
				Gross Total		1,000.0	00

# COUPA QUICK REFERENCE GUIDE



5. Alternatively, go to Invoices tab and click Create Credit Note

	Orders S	ervice/Time Sheets	ASN	Invoices Cat	alogues	Business Perf	formance Sol	urcing
dd-ons Setur								
nvoices Invoices	Lines Payment	Receipts						
				Select C	ustomer	Inchcape		
woices								
ivoices								
<b>voices</b> reate Invoic	es 🚺							
reate Invoice	es 🥡	voice from Contract	Create BI	ank Invoice	Create Cree	dit Note		
IVOICES reate Invoic Create Invoice from Export to v	es 7 PO Create In	voice from Contract	Create BI	lank Invoice	Create Cr	dit Note	✓ Search	, D
TVOICES Teate Invoice Create Invoice from Export to ~ Invoice #	ES 7 PO Create In Created Date	voice from Contract Status	Create BI	lank Invoice Gross Total	Create Cr	dit Note ered Comments	Search	ر n Actions

# NOTES

Global Business Services

You can create a credit note only for the invoices created by you in the CSP

6. Select the Invoice from the drop-down and click Continue

Credit Note		×
If you are issuing a credit note in regards to a p include the invoice number. If you are issuing a customer, please select other.	roblem with an invoice or goods credit note purely to offer a cre	s shipped, please dit to your
Reason	121212	~
Other (e.g. rebate)	<u>`</u>	
	Cancel	Continue

7. Choose how you want to correct the Invoice and click Create

Credit Note		×
How do you want to correct invoice "121212" ?		
<ul> <li>Completely cancel the invoice with a credit note <i>i</i></li> <li>Adjust invoice with a credit note <i>i</i></li> </ul>		
	Cancel	Create





### 8. Enter Credit Note #, Credit Note Date and Credit Reason



#### NOTES

You can attach Invoice/Credit Note copy in **Image Scan** field and attach additional documents in **Attachments** field

### 9. Click Submit

istment Ty	pe Quantity 🗸					
Type	Description	Qty	UOM	Price		1 000 00
Щ.	Test	-100	Each	~	10.00	-1,000.00
PO Line		Service/Time Sh	eets Line	Contract		Supplier part number
LT000049	36-1	None		~		
Tax Code	Default	Vehicle Identific	ation Number (VI	N)		
None		None				
Billing	4011821115					
Taxes						
VAT Ra	te	VAT Amount	Tax Reference	je		
24.0%	$\sim$	-240.00				
			То	tal Taxes		
				Lines Net Total		-1.000.00
				Lines VAT Totals		-240.00
				Total VAT		-240.00
				Net Total		-1,000.00
				Gross Total		-1,240.00
			Delete	Cancel	Save as dra	aft Calculate Submit