

Supplier Activities

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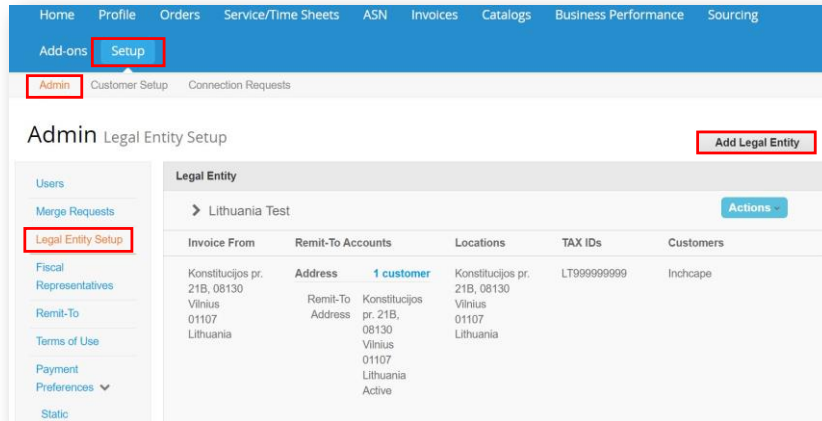
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Supplier Activities

Setup CSP Account

1. Select **Setup** tab, **Admin** tab, select **Legal Entity Setup**
2. Click **Add Legal Entity**



Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Address Remit-To Address 1 customer Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania Active	Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	LT999999999	Inchcape

NOTES

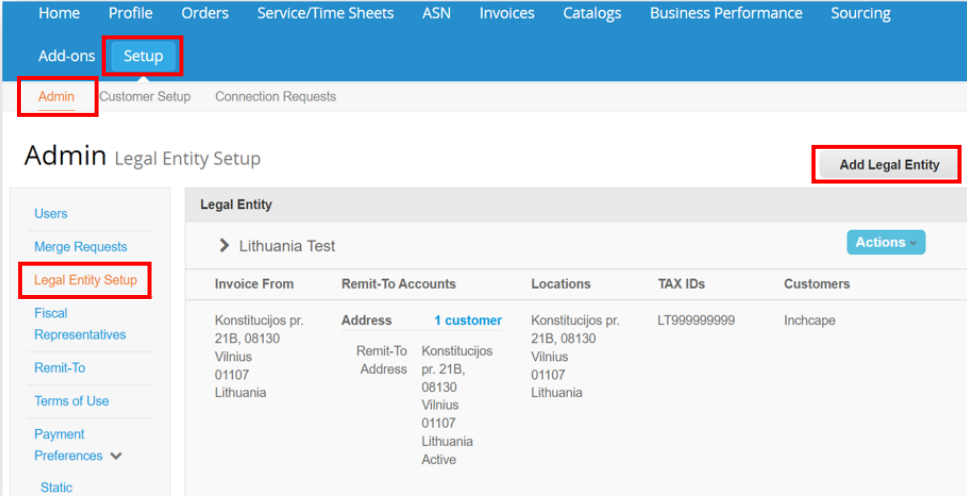
- You can deactivate a legal entity by selecting **Deactivate Legal Entity** from the Actions drop-down. Relevant for mkistakes
- You cannot edit information once saved – mistake = deactivate and set up correct legal entity
- All data used in the Legal Entity pages will be included in invoices created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

Supplier Activities

Setting up Legal Entity

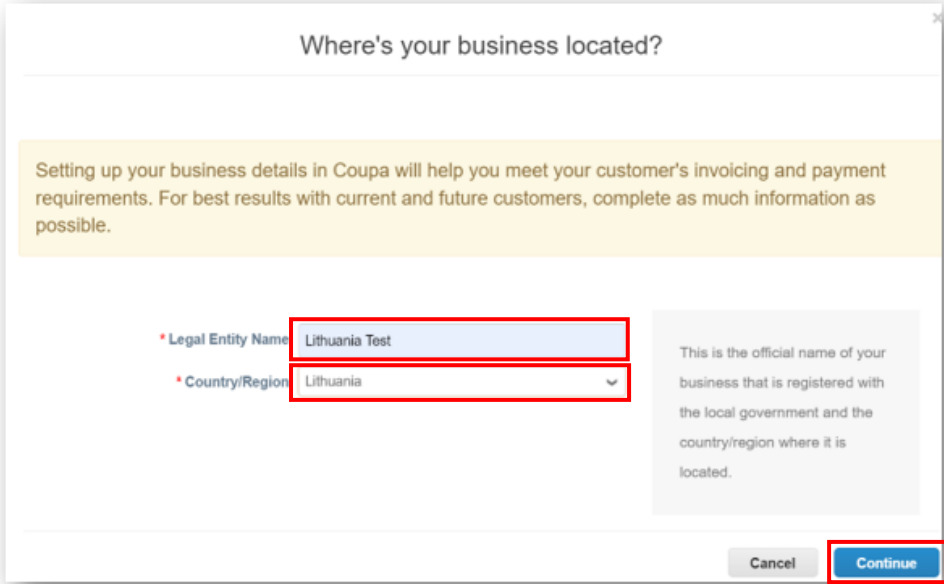
1. Go to the setup tab
2. Select **Admin**
3. Select **Legal Entity Setup**
4. Click **Add Legal Entity**

NOTES
All data used in the Legal Entity pages will pull through to the legal invoices Coupa creates so it must be accurate



Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Address 1 customer Remit-To Address Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania Active	Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	LT999999999	Inchcape

5. Enter your **Legal Entity Name**
6. Select your **Country**
7. Click **Continue**



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/Region

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

Supplier Activities

8. Tick **ALL** so you can view all Inchcape entities
9. Enter your registered Office address
10. Tick **Use this address for...** AND **Use this for Ship....** boxes. This will save you from having to enter your address multiple times

Tell your customers about your organization

Which customers do you want to see this?

All

Inchcape

What address do you invoice from?

*Address Line 1: Korantuoja pr. 21B, 08130

Address Line 2: [Empty]

*City: Vilnius

State: [Empty]

*Postal Code: 08127

Country/Region: Lithuania

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

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

What is your Tax ID?

Country/Region: Lithuania

*VAT ID: LT000000000

I don't have a VAT/GST Number

Add additional Tax ID

Miscellaneous

Invoice From Code: [Empty]

Preferred Language: Lithuanian (Lithuania)

Cancel Save & Continue

11. VAT registered?

- If you are VAT registered, enter your VAT number here, you need to add your company prefix (eg: EE for Estonia) before the number for it to register

What is your Tax ID?

Tax Country/Region: Lithuania

*VAT ID: LT000000000

I don't have a VAT/GST Number

Not VAT registered?

- If you are not VAT registered, tick the box next to "I don't have a VAT/GST Number". The field that appears below is a required field so enter 000 to move to the next step

Supplier Activities

What is your Tax ID? ⓘ

Country/Region x

VAT ID

I don't have a VAT/GST Number

* Local Tax ID

12. Choosing **Address** as the payment type means 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

What is your Remit-To Address?

Address Line 1 Konstitucijos pr. 21B, 08130

Address Line 2

City Vilnius

State

Postal Code 01107

Country/Region Lithuania

Cancel Save & Continue

NOTES

- **Do not add any banking information.**
- This information is in Inchcape's ERP system and not in Coupa.
- For any changes to your banking details, please contact Inchcape Business representative directly

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

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.

Remit-To Account	Remit-To Address	Status	
Address	Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Active	<input type="button" value="Manage"/>

Supplier Activities

14. If the address where you ship goods from is different from your registered office address, you can add a separate 'Ship From' address

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/regions 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	
Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Active	Manage

[Deactivate Legal Entity](#) [Done](#)

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.** [?](#)

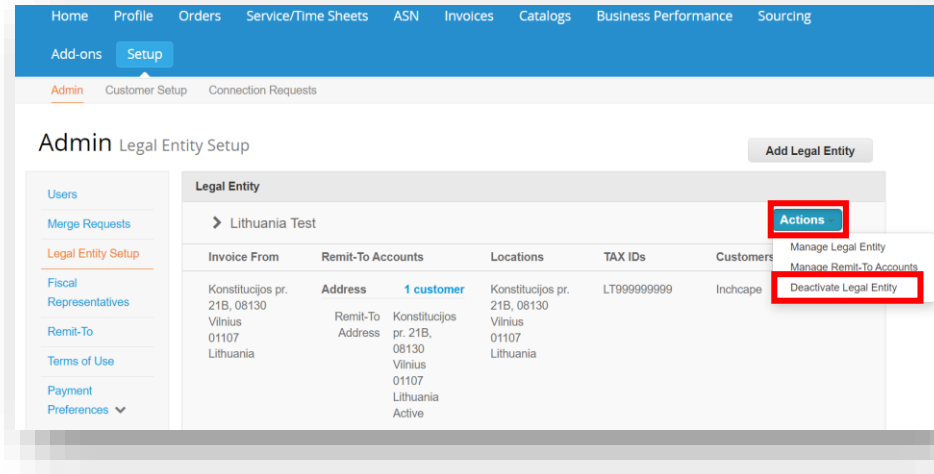
- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

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

Supplier Activities

Modifying Legal Entity

1. The details of your legal entity cannot be edited once saved.
2. If you have made an error, click **Actions** then **Deactivate Legal Entity** to start again



NOTES

- 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
- Please ensure you set up your legal entity correctly. It is extremely important this is correct as it will be visible on all Coupa generated invoices

Supplier Activities

Add Additional Users to the CSP

Inchcape is only able to setup one user on your portal, this person is defaulted as the CSP admin for your company

1. To add additional users, click on the Setup tab, then click Users

The screenshot shows the Coupa portal's 'Setup' page. The 'Setup' tab is highlighted in the top navigation bar. Below it, the 'Admin Users' section is visible, containing a table of users and an 'Invite User' button. The 'Users' column in the table lists 'Lithuania Test Supplier' with the email 'ashutosh.bisani@cognizant.com'. The 'Permissions' column shows 'ASNs' and 'Admin'. The 'Customer Access' column shows 'Inchcape'. A red box highlights the 'Invite User' button, and another red box highlights the 'Users' link in the left sidebar.

Users	Permissions	Customer Access
Lithuania Test Supplier ashutosh.bisani@cognizant.com	ASNs Admin	Inchcape

NOTES

- We recommend to provide full admin access to at least one additional person from your company
- Only users with admin access can add / remove legal entities

1. Enter **First Name**, **Last Name** and **Email**
2. Select the relevant user **Permissions**.

The screenshot shows the 'Invite User' form. It has three input fields for 'First Name', 'Last Name', and 'Email'. Below these are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has a list of checkboxes for various permissions, all of which are checked. The 'Customers' section has two checkboxes: 'All' and 'Inchcape', both of which are checked. At the bottom right, there are two buttons: 'Cancel' and 'Send Invitation', with the 'Send Invitation' button highlighted by a red box.

1. Click **Send Invitation**
2. The person you have added as a user will receive an invitation to join your company portal
3. Additional users will not need to complete any of the setup or the legal entity as you are inviting them to join your company's Coupa portal which is already setup.

Supplier Activities

Customers Not Visible in CSP

If you cannot see any customers in your portal

1. Go to the **Setup** tab
2. Select **Admin**
3. Select **Legal Entity Setup**
4. Click **Actions** and select **Manage Legal Entity**

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing

Add-ons **Setup**

Admin Customer Setup Connection Requests

Admin Legal Entity Setup

Add Legal Entity

Users

Merge Requests

Legal Entity Setup

Fiscal

Representatives

Remit-To

Terms of Use

Payment

Preferences

Legal Entity

Lithuania Test

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customer
Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Address 1 customer Remit-To Address Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania Active	Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	LT999999999	Inchcape

Actions

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

5. Click **Save & 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 Lithuania Test

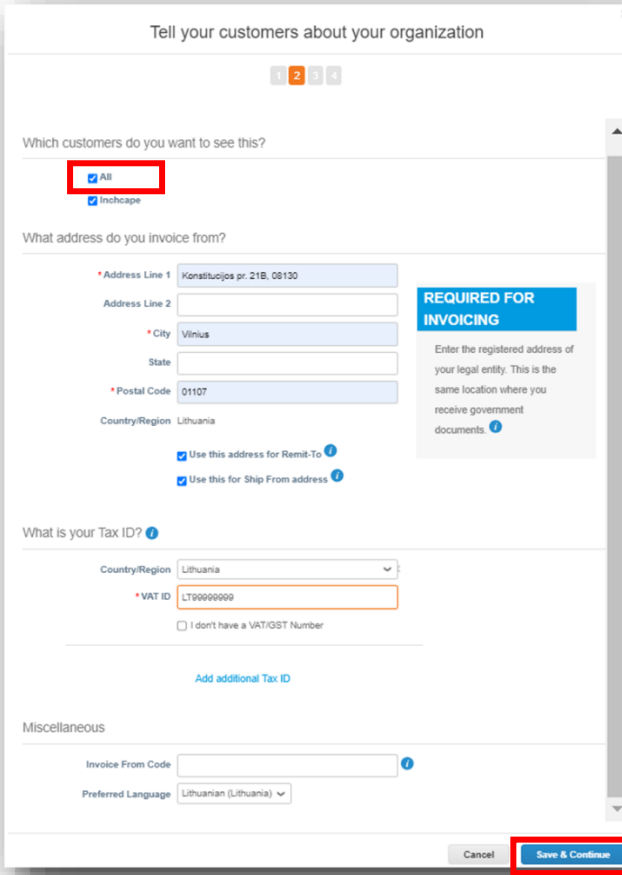
* Country/Region Lithuania

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

Deactivate Legal Entity Cancel **Save & Continue**

Supplier Activities

6. Make sure **All** is ticked then scroll to the bottom of the page and click **Continue**



Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All

Inchcape

What address do you invoice from?

* Address Line 1: Konstitucijos pr. 21B, 08130

Address Line 2: [Empty]

* City: Vilnius

State: [Empty]

* Postal Code: 01107

Country/Region: Lithuania

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

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

What is your Tax ID?

Country/Region: Lithuania

* VAT ID: LT90090099

I don't have a VAT/GST Number

Add additional Tax ID

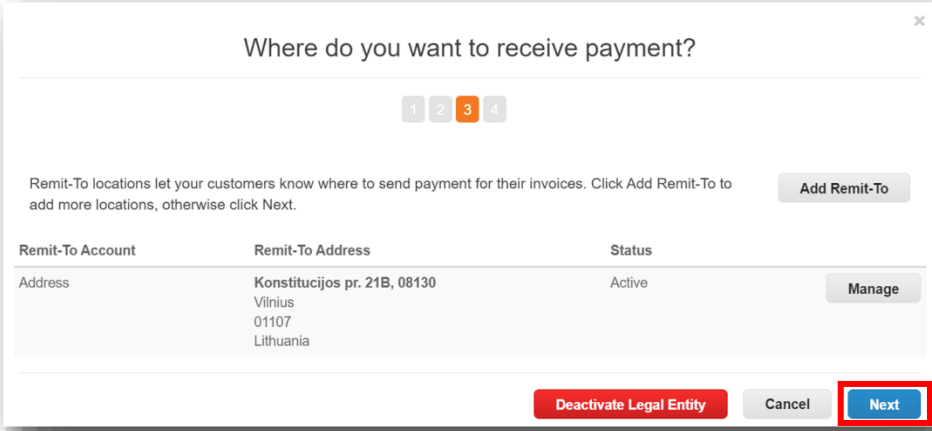
Miscellaneous

Invoice From Code: [Empty]

Preferred Language: Lithuanian (Lithuania)

Cancel Save & Continue

7. Continue to click **Next** on each screen until all pages are completed



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 Account	Remit-To Address	Status	
Address	Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Active	Manage

Deactivate Legal Entity Cancel Next

Supplier Activities

8. You should now see customers connected to your legal entity

Where do you ship goods from? ×

1 2 3 4

For many countries/regions 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	
Konstitucijos pr. 21B, 08130 Vilnius 01107 Lithuania	Active	Manage

Deactivate Legal Entity Done

Supplier Activities

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.

The screenshot shows the 'Orders' tab in the COUPA system. The 'Select Customer' dropdown is set to 'Inchcape'. Below this, there is a table of 'Purchase Orders' with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row is highlighted with a red box: PO Number: LT00004936, Order Date: 01/26/23, Status: Issued, Acknowledged At: None, Items: 100 Each of Test, Unanswered Comments: No, Total: 1,000.00 EUR, and an Actions icon. Below the table, the 'General Info' section is visible, with the 'Invoice Date' field set to '02/03/23', highlighted with a red box.

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**

The screenshot shows the 'Lines' page in the COUPA system. It displays a form for a purchase order line with the following fields: Type (Shopping cart icon), Description (Test), Qty (100), UOM (Each), Price (10.00), and a total price of 1,000.00. Below this, there are sections for PO Line (LT00004936-1), Service/Time Sheet Line (None), Contract (dropdown), Supplier Part Number (input field), Tax Code Default (None), Vehicle Identification Number (VIN) (None), Billing (K-3023204011--821115), and Taxes (VAT Rate, VAT Amount, Tax Reference). At the bottom, there is a 'Totals & Taxes' section with the following values: Lines Net Total (1,000.00), Lines VAT Totals (0), Total VAT (0.00), Net Total (1,000.00), and Gross Total (1,000.00). The 'Calculate' and 'Submit' buttons are highlighted with red boxes.

Supplier Activities

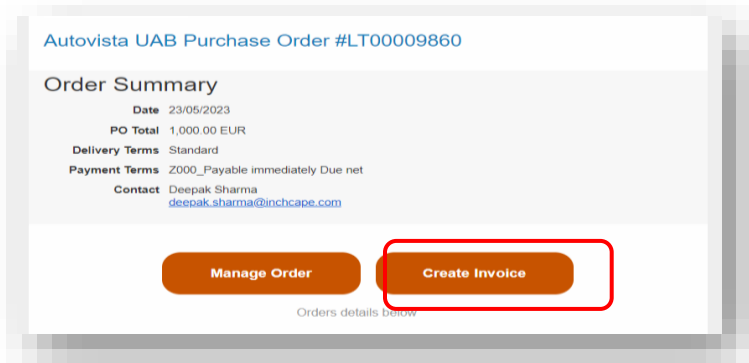
Invoicing using SAN (Supplier Actionable Notifications)

What is SAN?

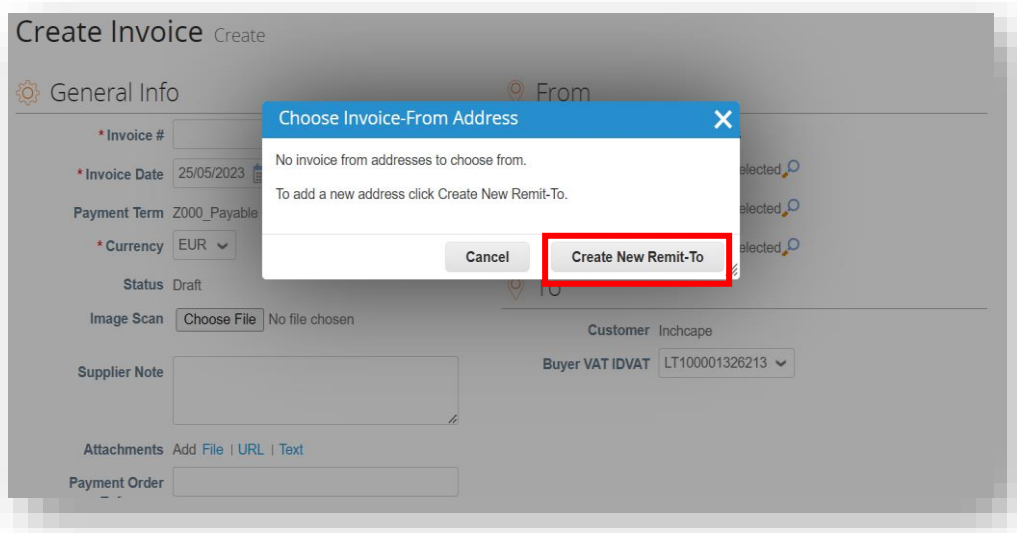
Supplier Actionable Notification (SAN) is one of the e-Invoicing channels that can push Invoices from the supplier's directly into Coupa. Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications for POs created in Coupa, having the option to **create an Invoice** or create a CSP account if you want to take advantage of the benefits of working with your customers through the CSP.

How to create an e-invoice using SAN

1. Open your mailbox in which you receive **Purchase Orders**(POs)
2. Open the email and click **Create Invoice**

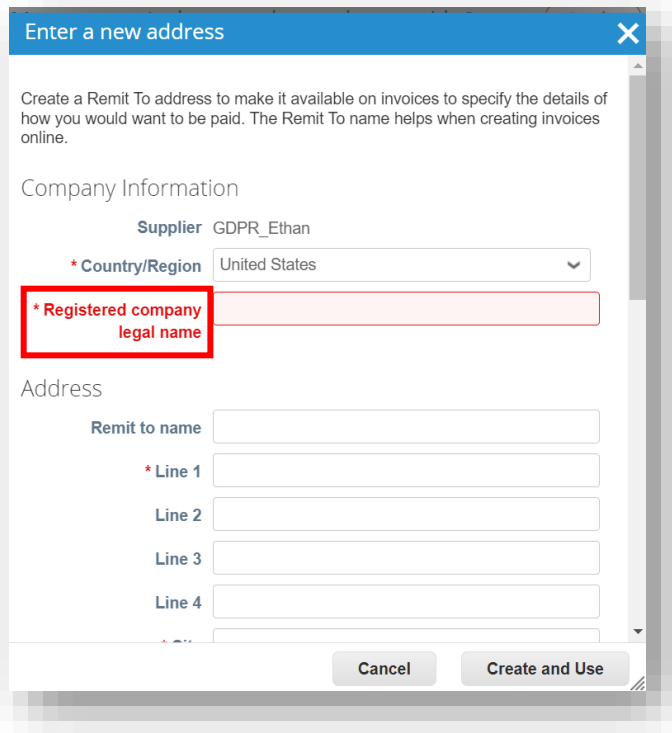


3. Before you can create an Invoice, you must create a new **Remit-to** address



Supplier Activities

4. Fill in the required details



Enter a new address [X]

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

Company Information

Supplier: GDPR_Ethan

* Country/Region: United States

* Registered company legal name

Address

Remit to name

* Line 1

Line 2

Line 3

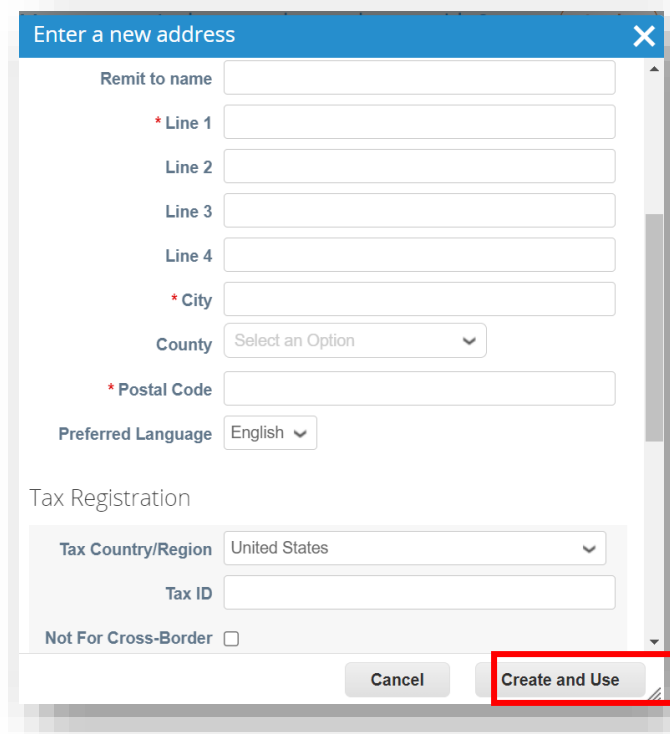
Line 4

Cancel Create and Use

NOTES

- Choose your Country/Region, Company Name, Company Address
- Fields marked with a * are mandatory

5. Once filled, click **Create and Use**



Enter a new address [X]

Remit to name

* Line 1

Line 2

Line 3

Line 4

* City

County: Select an Option

* Postal Code

Preferred Language: English

Tax Registration

Tax Country/Region: United States

Tax ID

Not For Cross-Border

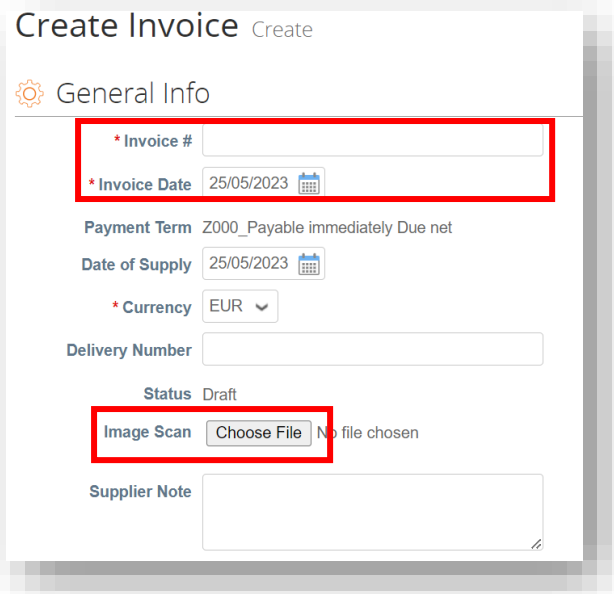
Cancel Create and Use

NOTES

- Fill in the City, Postal Code and Tax ID
- Fields marked with a * are mandatory

Supplier Activities


6. Enter the unique **Invoice #**, **Invoice date**




Create Invoice Create

General Info

* Invoice #

* Invoice Date 25/05/2023 

Payment Term Z000_Payable immediately Due net

Date of Supply 25/05/2023 

* Currency EUR

Delivery Number

Status Draft

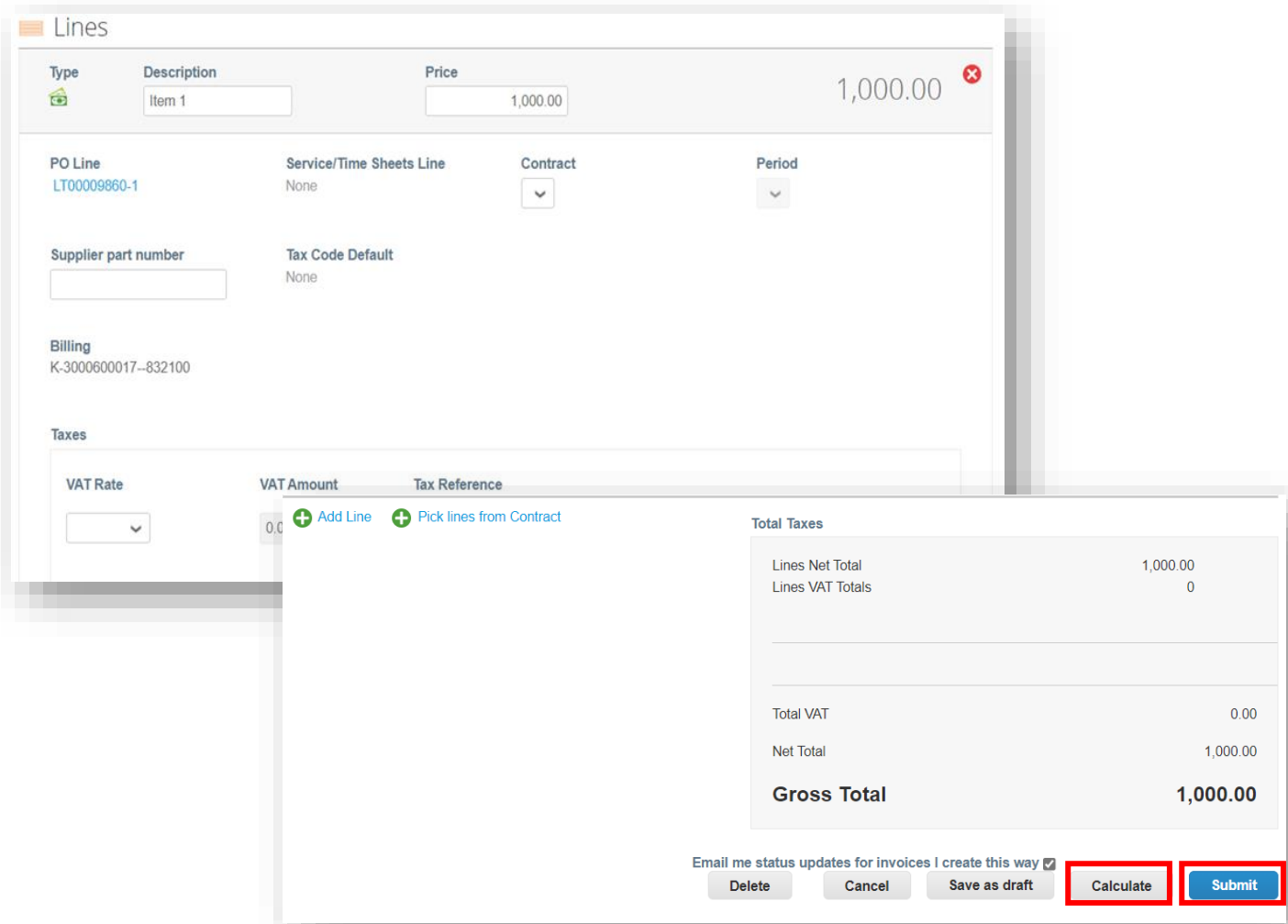
Image Scan No file chosen

Supplier Note


NOTES

- Please ensure the Invoice Date is changed to the Tax date of the invoice. Do not leave it as the submission date as this will cause delays to your payments
- Select an invoice attachment in PDF format in the Image Scan section

7. Complete the relevant fields and click **Calculate** to work out the VAT element of the invoice and click **Submit**



Lines

Type	Description	Price
	Item 1	1,000.00

PO Line: LT00009860-1

Service/Time Sheets Line: None

Contract:

Period:

Supplier part number:

Tax Code Default: None

Billing: K-3000600017-832100

Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text"/>	0.0	<input type="text"/>

Total Taxes

Lines Net Total	1,000.00
Lines VAT Totals	0
<hr/>	
Total VAT	0.00
Net Total	1,000.00
Gross Total	1,000.00

Email me status updates for invoices I create this way

Supplier Activities

Raise Credit Note - Option 1

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

Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to View All 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		
LT00004876	01/12/23	Cancelled	None	3 Each of Smoke detector 02	No	300.00 EUR		

Create Credit Note Create

General Info

* Credit Note #

* Credit Note Date

Payment Term Z000_Payable immediately Due net

Original Date of Supply

* Currency

Delivery Number

Status Draft

* Original Invoice #

* Original Invoice Date

Image Scan No file chosen

2. Complete the mandatory fields:
Credit Note #, Credit Note Date, Currency, Original Invoice # and Original Invoice Date,

3. Complete the relevant fields,
4. Click **Calculate** to work out the VAT element of the invoice
5. Click **Submit**

Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
	Test	-100.0	Each	10.00	1,000.00

PO Line Service/Time Sheet Line Contract

Tax Code Default Vehicle Identification Number (VIN)

Billing

Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>

+ Add Line + Pick lines from Contract

Totals & Taxes

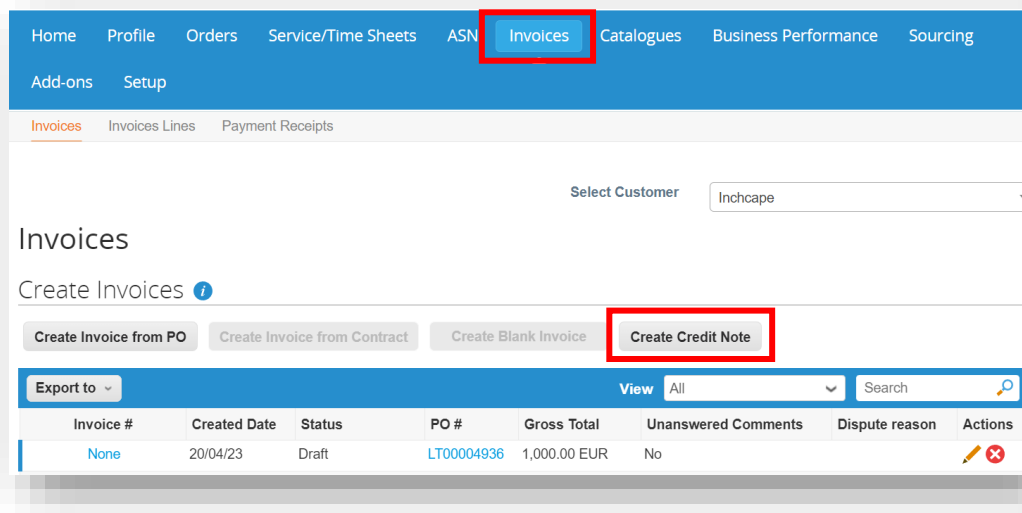
Lines Net Total	1,000.00
Lines VAT Totals	0
Total VAT	0.00
Net Total	1,000.00
Gross Total	1,000.00


Delete Cancel Save as Draft Calculate **Submit**

Supplier Activities

Raise Credit Note - Option 2

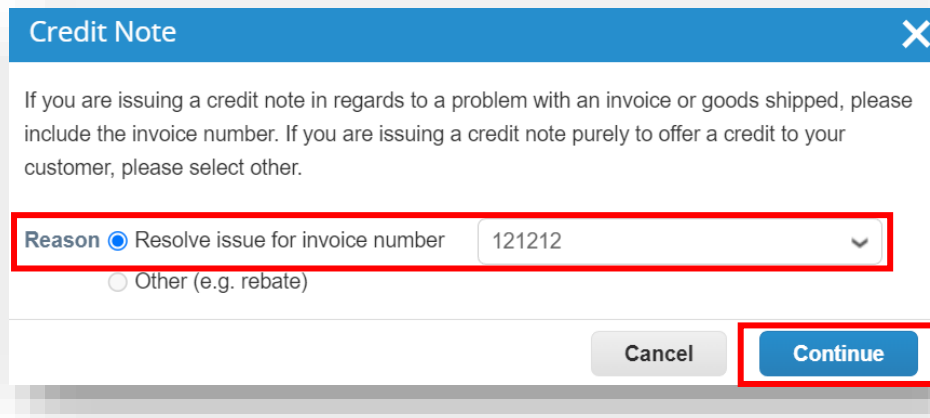
1. Go to **Invoices** tab and click **Create Credit Note**



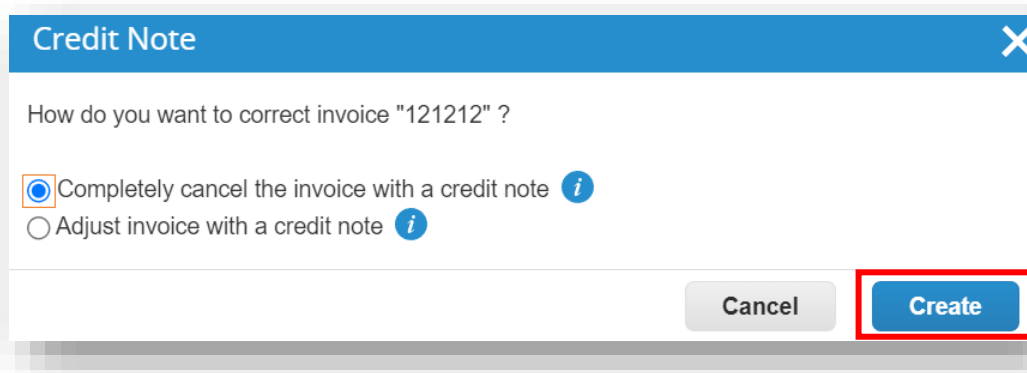
Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
None	20/04/23	Draft	LT00004936	1,000.00 EUR	No		

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

2. Select the Invoice from the drop-down and click **Continue**

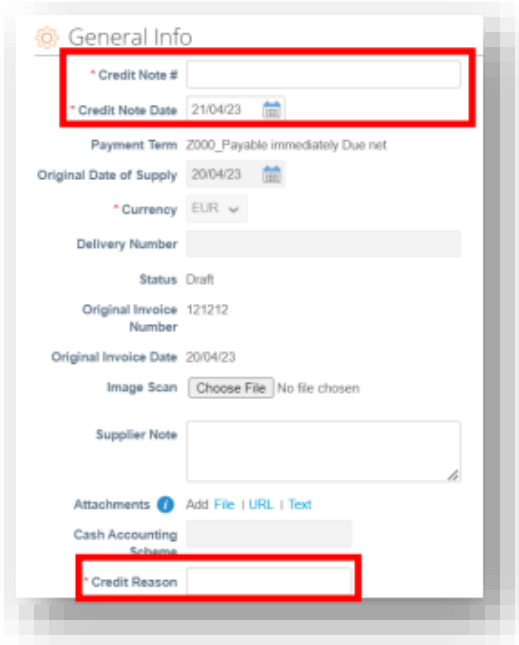


3. Choose how you want to correct the Invoice and click **Create**



Supplier Activities

4. Enter **Credit Note #**, **Credit Note Date** and **Credit Reason**



General Info

* Credit Note #

* Credit Note Date 21/04/23

Payment Term Z000_Payable immediately Duo net

Original Date of Supply 20/04/23

* Currency EUR

Delivery Number

Status Draft

Original Invoice Number 121212

Original Invoice Date 20/04/23

Image Scan No file chosen

Supplier Note

Attachments

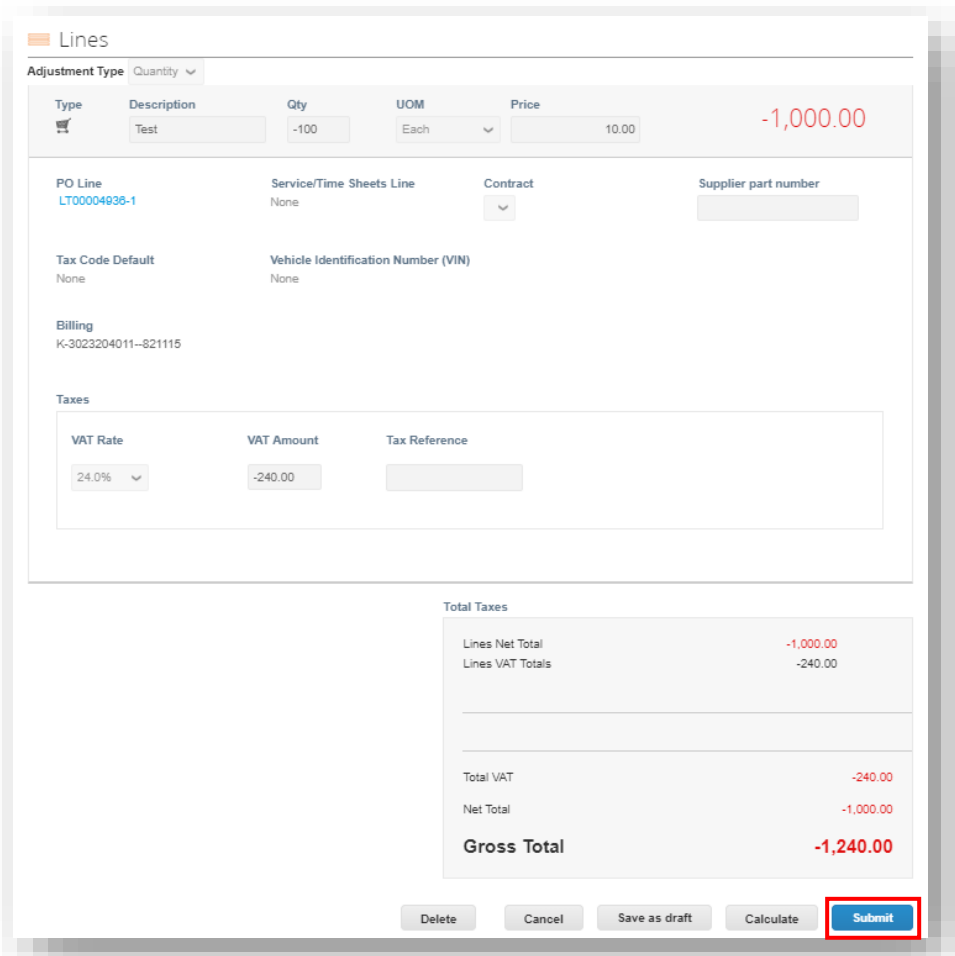
Cash Accounting

* Credit Reason

NOTES


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

5. Click **Submit**



Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
	Test	-100	Each	10.00	-1,000.00

PO Line [LT00004936-1](#) Service/Time Sheets Line Contract Supplier part number

Tax Code Default None Vehicle Identification Number (VIN) None

Billing K-3023204011--821115

Taxes

VAT Rate	VAT Amount	Tax Reference
24.0%	-240.00	<input type="text"/>

Total 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