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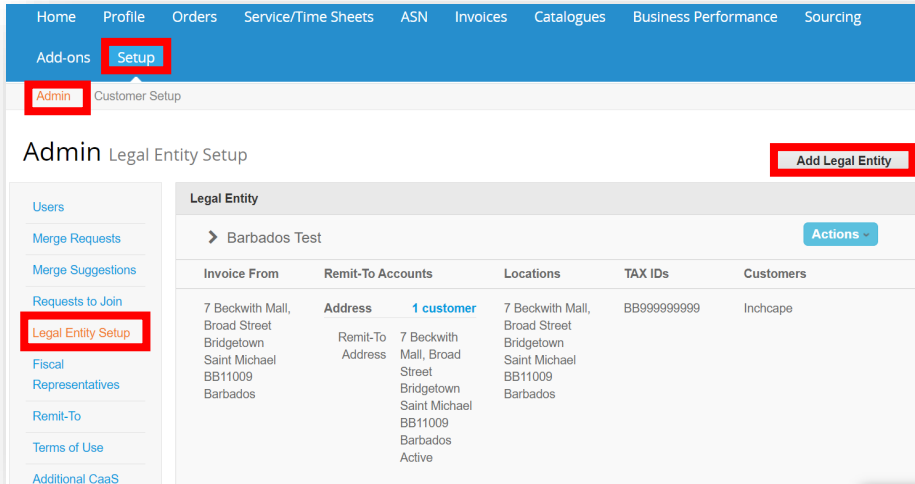
[Create an Invoice using SAN \(Supplier Actionable
Notifications\)](#)

[Raise a Credit Note](#)

Supplier Activities

Setup CSP Account

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



The screenshot shows the Coupa Admin interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', and 'Sourcing'. Below this, there are 'Add-ons' and 'Setup' tabs. The 'Setup' tab is highlighted. Under 'Setup', there are 'Admin' and 'Customer Setup' sub-tabs. The 'Admin' sub-tab is selected. The main content area is titled 'Admin Legal Entity Setup' and features an 'Add Legal Entity' button in the top right corner. A left-hand sidebar contains various menu items, with 'Legal Entity Setup' highlighted. The main content area displays a table for 'Legal Entity' with the following data:

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Address Remit-To Address 7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados Active	1 customer	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Inchcape

NOTES

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

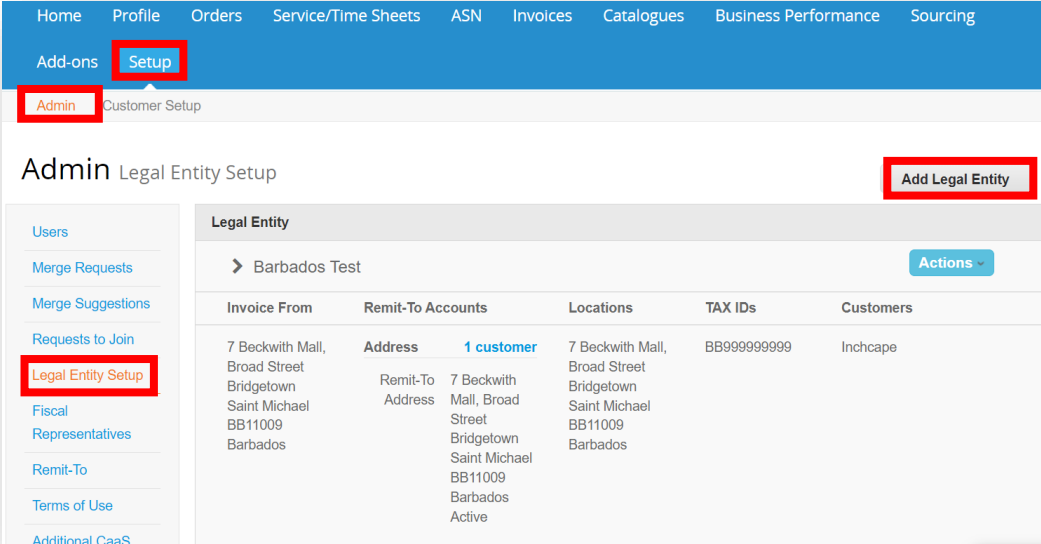
Supplier Activities

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 into the legal invoices created by Coupa, so the information must be accurate



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

Add-ons **Setup** Customer Setup

Admin Customer Setup

Admin Legal Entity Setup **Add Legal Entity**

Users

Merge Requests

Merge Suggestions

Requests to Join

Legal Entity Setup

Fiscal Representatives

Remit-To

Terms of Use

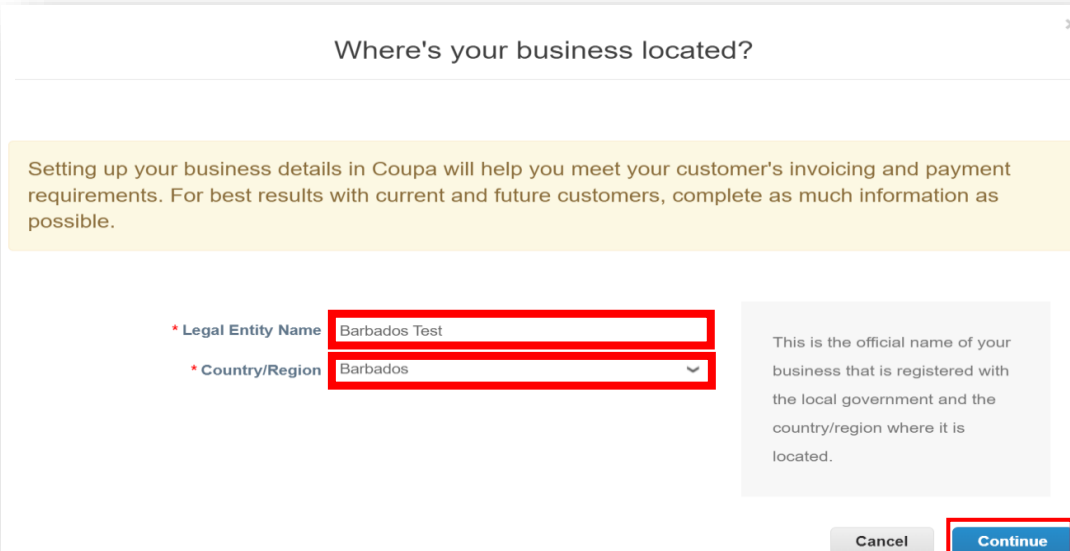
Additional CaaS

Legal Entity

Barbados Test **Actions**

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Address 1 customer Remit-To Address 7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados Active	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	BB999999999	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.

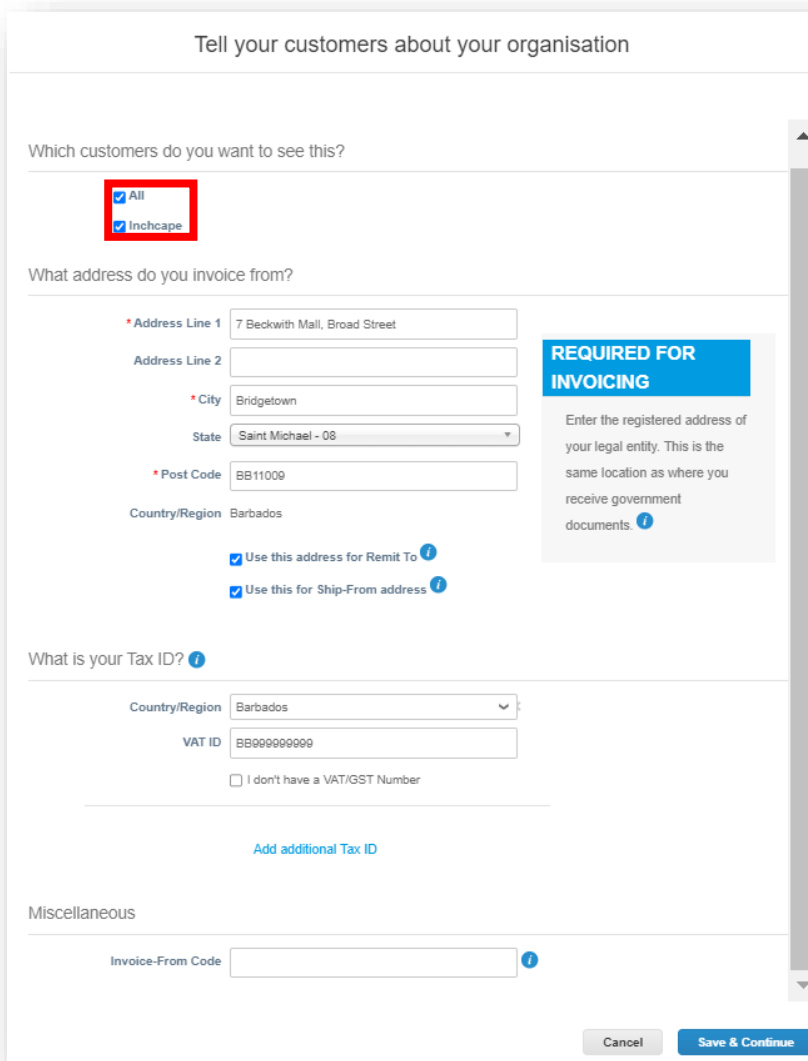
* Legal Entity Name

* 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 organisation

Which customers do you want to see this?

All
 Inchcape

What address do you invoice from?

* Address Line 1
Address Line 2
* City
State
* Post Code
Country/Region

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 as where you receive government documents.

What is your Tax ID?

Country/Region
VAT ID
 I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

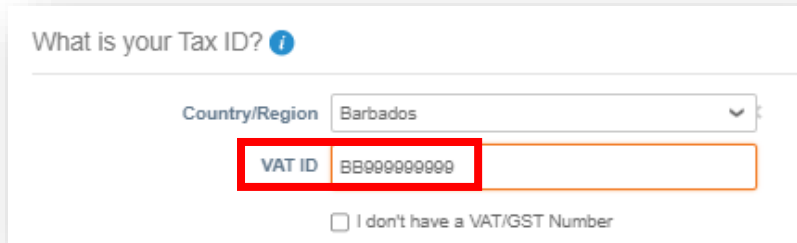
Invoice-From Code

Cancel Save & Continue

11. VAT registered?

- If your tax is registered, enter your TAX ID here, you need to add your company prefix (e.g., BB for Barbados. Refer the table in the Appendix section at the end to check the country code for your country) before the number for it to register

Supplier Activities



What is your Tax ID? ⓘ

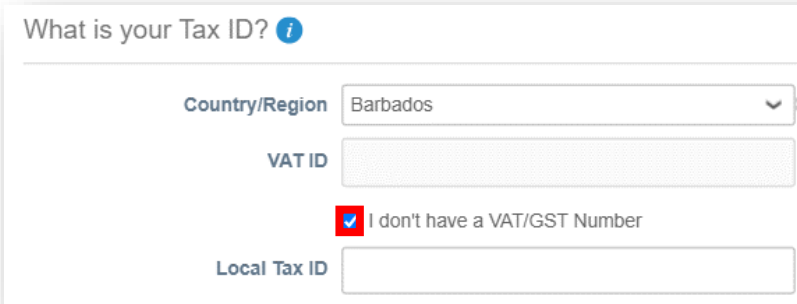
Country/Region

VAT ID

I don't have a VAT/GST Number

Not VAT registered?

- If tax is not 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



What is your Tax ID? ⓘ

Country/Region

VAT ID

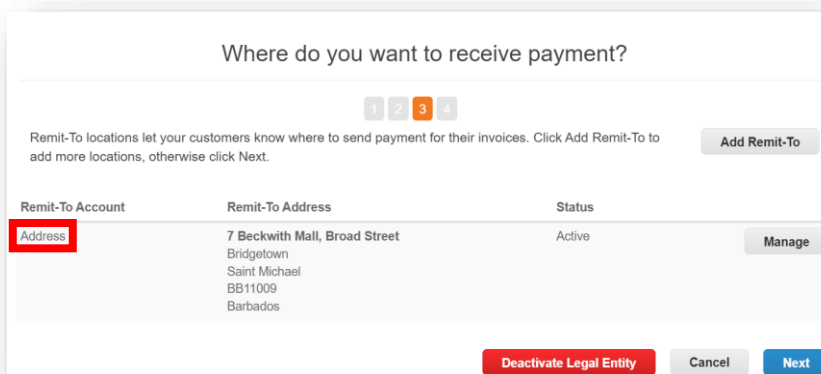
I don't have a VAT/GST Number

Local Tax ID

NOTES

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

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? x

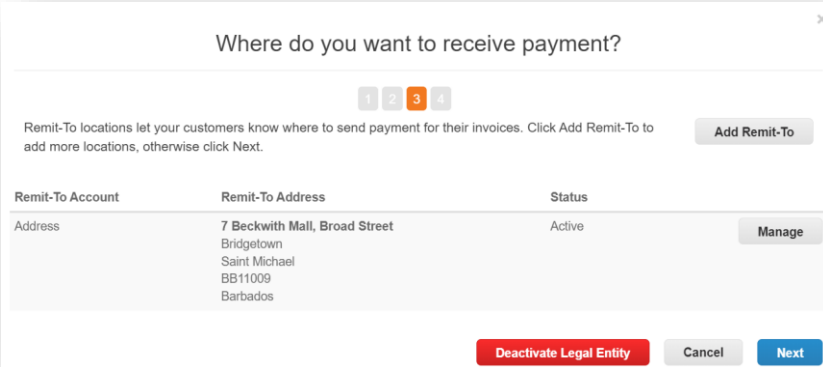
1 2 3 4

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	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Active	<input type="button" value="Manage"/>

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

Supplier Activities



Where do you want to receive payment?

1 2 3 4

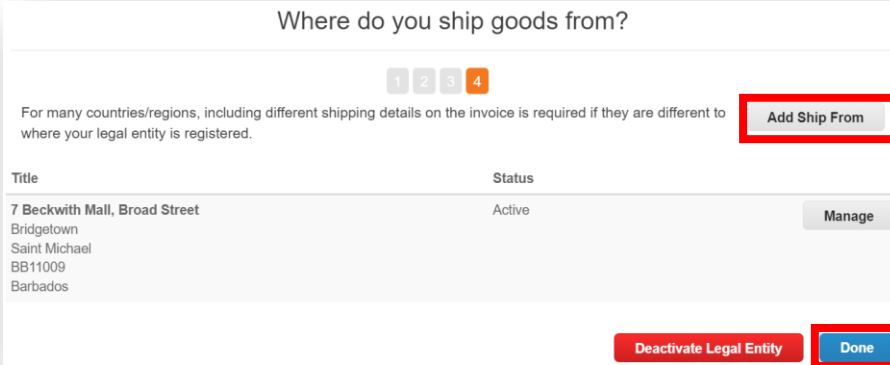
Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Active	Manage

Deactivate Legal Entity Cancel Next

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	
7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Active	Manage

Deactivate Legal Entity Done

Supplier Activities

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**

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 the information is correct as it will be visible on all Coupa generated invoices**

Modifying Legal Entity

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

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

Admin Customer Setup

Admin Legal Entity Setup

Add Legal Entity

Legal Entity	Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers	Actions
> Barbados Test	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Address 1 customer Remit-To Address 7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados Active	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	BB99999999	Inchcape	Manage Legal Entity Manage Remit-To Account Deactivate Legal Entity

Supplier Activities

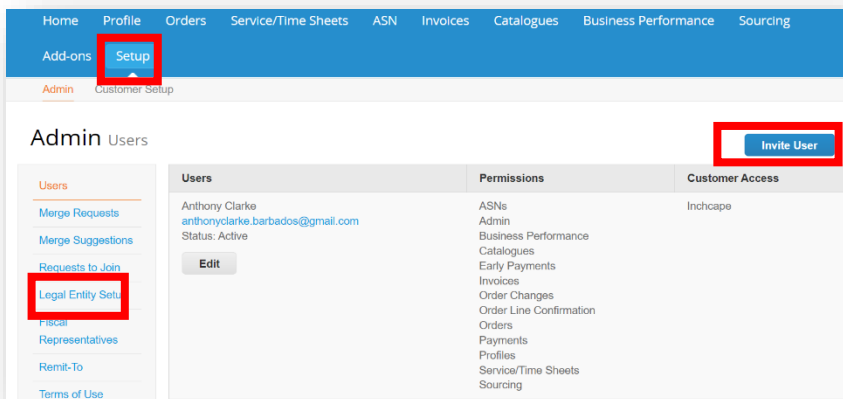
Add Additional Users to the CSP

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

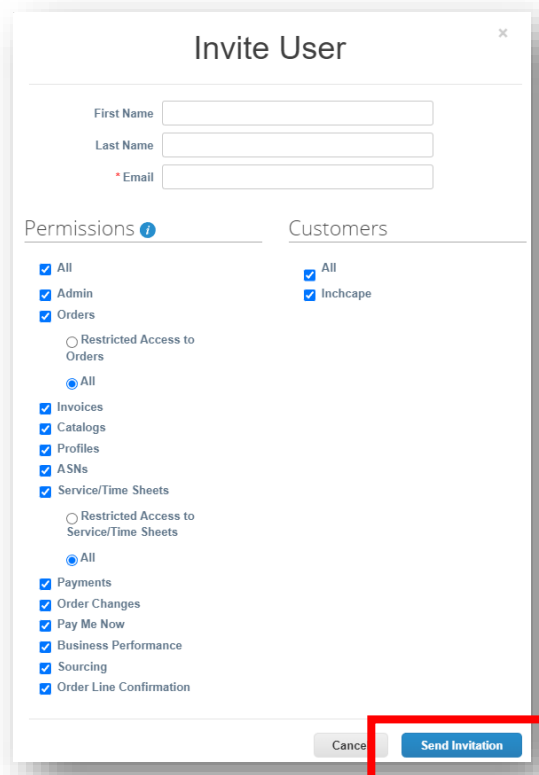
1. To add additional users, click on the Setup tab, then click Users
2. Enter **First Name**, **Last Name** and **Email**
3. Select the relevant user **Permissions**.

NOTES

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



4. Click **Send Invitation**
5. The person you have added as a user will receive an invitation to join your company portal
6. Additional users are not required to provide any company information or set up a legal entity. They are added to your company's Coupa portal which is already setup.



Invite User

First Name

Last Name

* Email

Permissions **i** Customers

All All

Admin Inchcape

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Pay Me Now

Business Performance

Sourcing

Order Line Confirmation

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**

The screenshot shows the Coupa Admin portal navigation bar with 'Setup' highlighted. Below it, the 'Admin' tab is selected, leading to the 'Customer Setup' page. The 'Legal Entity Setup' section is active, showing details for 'Barbados Test'. A table lists 'Invoice From' (7 Beckwith Mall, Broad Street, Bridgetown, Saint Michael, BB11009, Barbados), 'Remit-To Accounts' (Address: 7 Beckwith Mall, Broad Street, Bridgetown, Saint Michael, BB11009, Barbados; Remit-To Address: 7 Beckwith Mall, Broad Street, Bridgetown, Saint Michael, BB11009, Barbados, Active), 'Locations' (7 Beckwith Mall, Broad Street, Bridgetown, Saint Michael, BB11009, Barbados), 'TAX IDs' (BB99999999), and 'Customers' (Inchcape). An 'Actions' dropdown menu is open, showing options: 'Manage Legal Entity', 'Manage Remit-To Accour', and 'Deactivate Legal Entity'.

5. Click **Save & Continue**

The 'Miscellaneous Information' dialog box contains a message: '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.' Below the message, the 'Company Name' is 'Barbados Test' and the 'Country/Region' is 'Barbados'. A text box on the right states: 'Conducting business in certain countries/regions requires your invoice to contain specific information about your company.' At the bottom, there are three buttons: 'Deactivate Legal Entity' (red), 'Cancel' (grey), and 'Continue' (blue, highlighted).

Supplier Activities

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

Tell your customers about your organisation

Which customers do you want to see this?

All
 Inchcape

What address do you invoice from?

Address Line 1 7 Beckwith Mall, Broad Street
Address Line 2
City Bridgetown
State Saint Michael
Post Code BB11009
Country/Region Barbados

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 as where you receive government documents. ⓘ

What is your Tax ID? ⓘ

Tax Country/Region Barbados
VAT ID BB000000000
 I don't have a VAT/GST Number

Miscellaneous

Remit-To Code
Preferred Language

[Deactivate Legal Entity](#) [Cancel](#) [Continue](#)

Supplier Activities

- 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	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Active	Manage

Deactivate Legal Entity Cancel Next

- 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

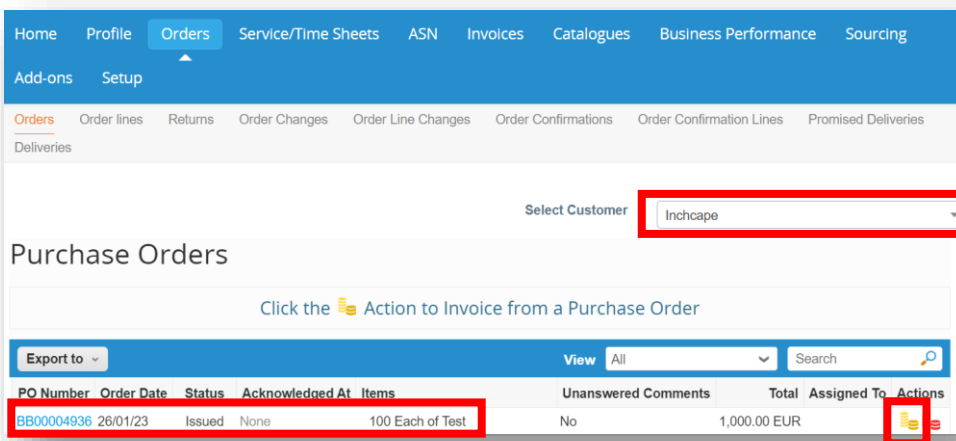
Title	Status	
7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	Active	Manage

Deactivate Legal Entity Done


Supplier Activities

Create an Invoice from Purchase Order

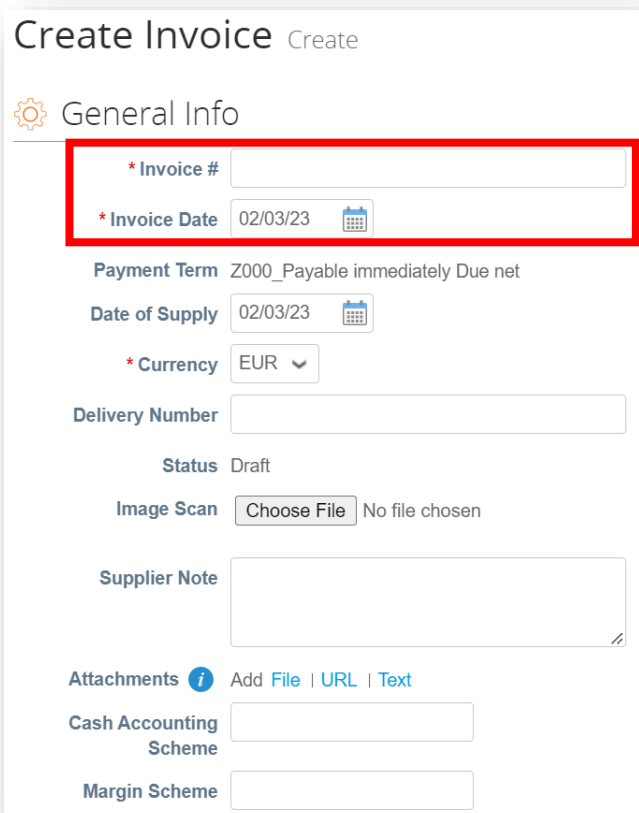
1. From the homepage, open the **Orders** tab.
2. Select Inchcape on the **Select Customer** dropdown menu.
3. Locate the relevant PO and click the **Gold Coins** icon.



The screenshot shows the COUPA interface with the 'Orders' tab selected. The 'Select Customer' dropdown is set to 'Inchcape'. Below the dropdown, the 'Purchase Orders' section is visible, with a table listing purchase orders. The first row is highlighted with a red box, showing PO Number 'BB00004936', Order Date '26/01/23', Status 'Issued', Acknowledged At 'None', and Items '100 Each of Test'. The 'Gold Coins' icon in the 'Actions' column is also highlighted with a red box.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
BB00004936	26/01/23	Issued	None	100 Each of Test	No	1,000.00 EUR		

4. Enter the **Invoice #** and select **Invoice Date**



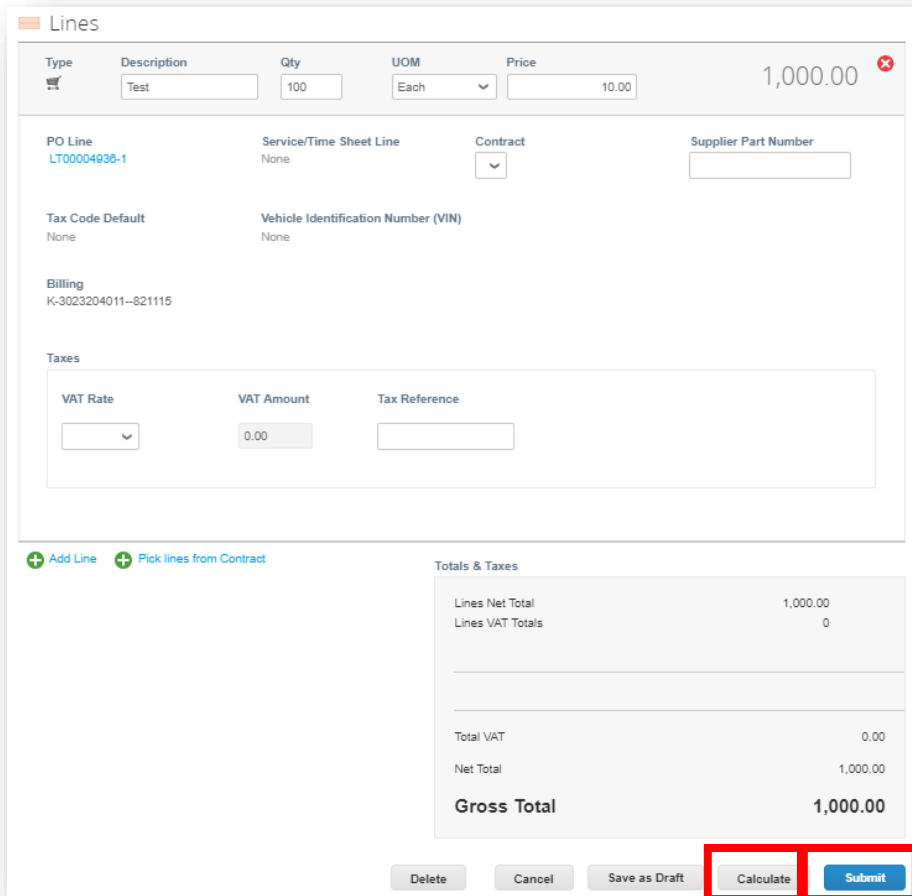
The screenshot shows the 'Create Invoice' form with the 'General Info' section expanded. The 'Invoice #' and 'Invoice Date' fields are highlighted with a red box. The 'Invoice Date' is set to '02/03/23'. Other fields include 'Payment Term' (Z000_Payable immediately Due net), 'Date of Supply' (02/03/23), 'Currency' (EUR), 'Delivery Number', 'Status' (Draft), 'Image Scan' (Choose File), 'Supplier Note', 'Attachments' (Add File | URL | Text), 'Cash Accounting Scheme', and 'Margin Scheme'.

NOTES



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

Supplier Activities

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



Lines

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

PO Line
LT00004936-1

Service/Time Sheet Line
None

Contract

Supplier Part Number

Tax Code Default
None

Vehicle Identification Number (VIN)
None

Billing
K-3023204011--821115

Taxes

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

[+ Add Line](#) [+ Pick lines from Contract](#)

Totals & 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

Supplier Activities

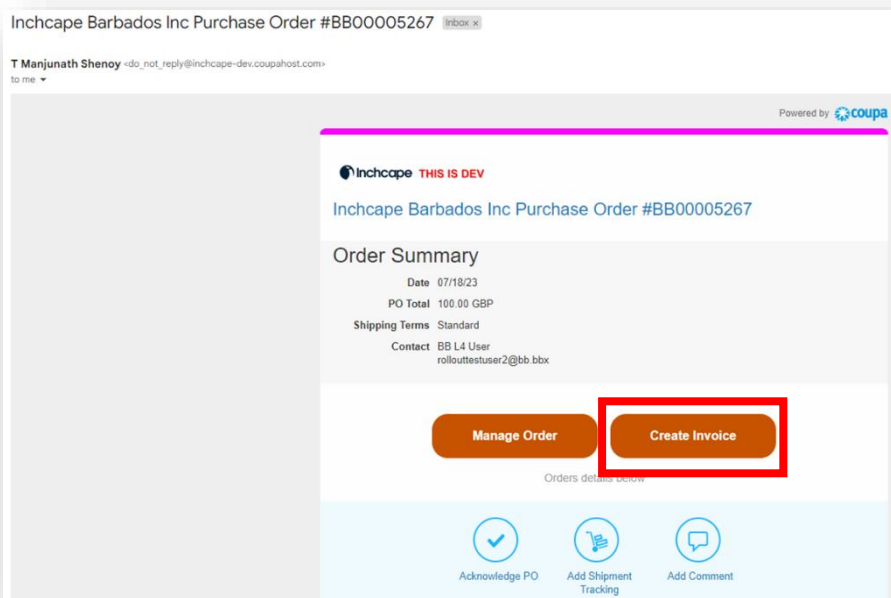
Invoicing using SAN (Supplier Actionable Notifications)

What is SAN?

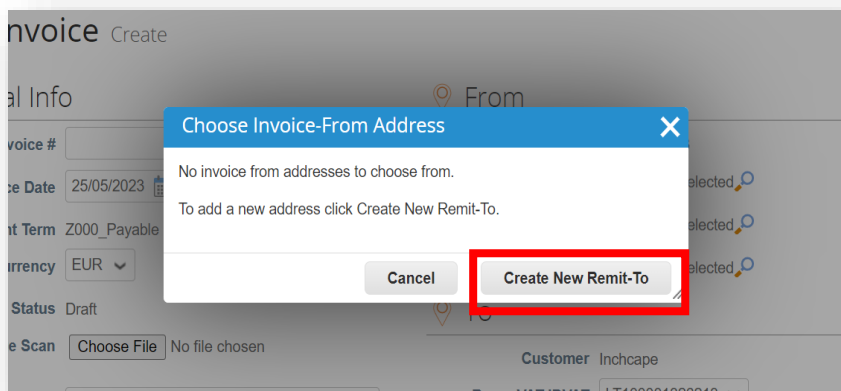
Supplier Actionable Notification (SAN) is one of the e-Invoicing channels that can push Invoices from the suppliers directly into Coupa. Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications for POs created in Coupa, giving the option to **create an Invoice** or create a CSP account. This is an advantage 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**

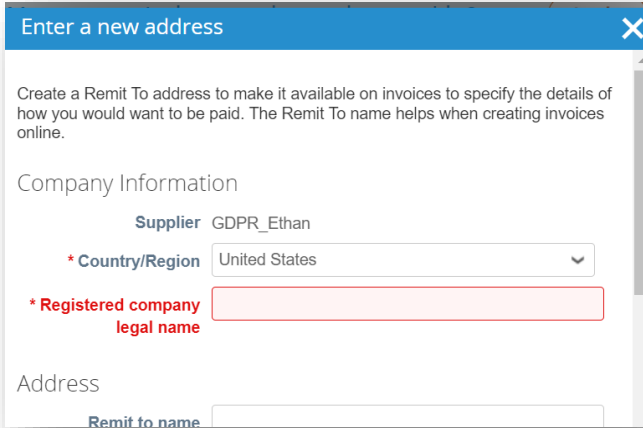


3. Before you can create an Invoice, you must create a new **Remit-to** address



Supplier Activities

4. Fill in the required details



Enter a new address

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

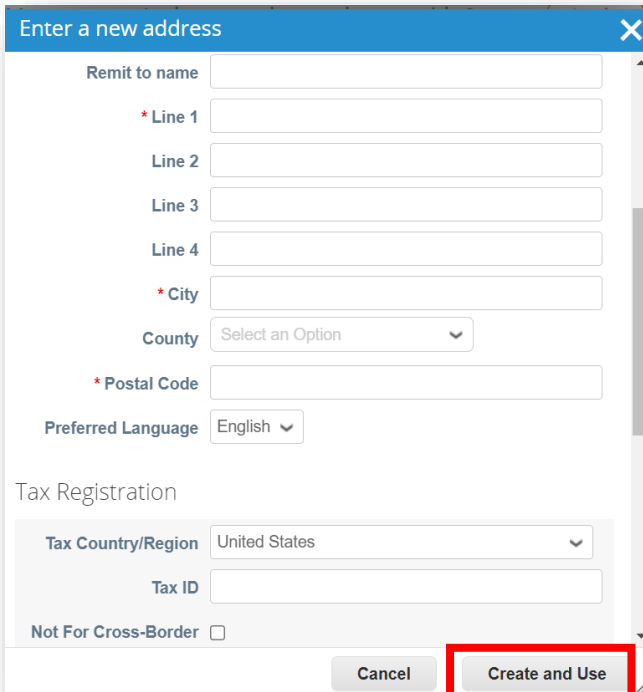
* Country/Region United States

* Registered company legal name

Address

Remit to name

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



Enter a new address

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

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

Supplier Activities

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

NOTES

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

Create Invoice Create

General Info

* Invoice #

* Invoice Date 20/07/2023

Payment Term

* Currency GBP

Status Draft

Image Scan No file chosen

Supplier Note

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

Payment Order Reference

7. Complete the relevant fields and click **Calculate** and click **Submit**

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

Lines Line Level Taxation

Type	Description	Price
	Software installation for	100.00

PO Line BB00005267-1 Service/Time Sheets Line None Contract Period

Supplier part number Tax Code Default None Vehicle Identification Number (VIN) None

Billing K-N800021021-822200

[+ Add Line](#) [+ Pick lines from Contract](#)

Total Taxes

Lines Net Total	100.00
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.000
Total Tax	0.00
Net Total	100.00
Total	100.00

Supplier Activities

Raise Credit Note - Option 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
BB00010619	10/03/23	Issued	None	1 Each of Test SE 05	No	120.00 GBP		
BB00010618	10/03/23	Issued	None	1 Each of Test SE 04	No	100.00 GBP		

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

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

- Complete the relevant fields,

Lines Line Level Taxation

Adjustment Type

Type	Description	Qty	UOM	Price	
	Test SE 01	-1.0	Each	60.00	60.00

PO Line **BB00010615-1** Service/Time Sheet Line None Contract

Tax Code Default None Billing K-N802X15004--813300

Supplier Activities

4. Click **Calculate**
5. Click **Submit**

Totals & Taxes

Lines Net Total	60.00
Tax	BB: P0_SAPBI 0.0 % -0.00
Total Tax	0.00
Net Total	60.00
Total	60.00

Buttons: Delete, Cancel, Save as Draft, **Calculate**, **Submit**

Raise Credit Note - Option 2

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

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

Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer: Inchcape

Invoices

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice **Create Credit Note**

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INSE01	10/03/23	Pending Approval	BB00010615	60.00 GBP	No		

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

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

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

Reason Resolve issue for invoice number 121212

Other (e.g. rebate)

Buttons: Cancel, **Continue**

Supplier Activities

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

Credit Note

How do you want to correct invoice "121212" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

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

General Info

* Credit Note #

* Credit Note Date 21/04/23

Payment Term 2000_Payable immediately Due 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 *i* Add File | URL | Text

Cash Accounting Scheme

* Credit Reason

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

Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
	Test SE 01	-1	Each	60.00	-60.00

PO Line BB00010615-1

Service/Time Sheet Line None

Contract

Supplier Part Number

Tax Code Default None

Billing K-N802X15004-813300

Supplier Activities

5. Click **Submit**

Totals & Taxes

Lines Net Total	-60.00
Tax	BB: P0_SAPBI 0.000 % 0.000
Total Tax	0.00
Net Total	-60.00
Total	-60.00

Delete Cancel Save as Draft Calculate **Submit**