COUPA QUICK REFERENCE GUIDE

Inchcape

Supplier Activities

Table of Contents

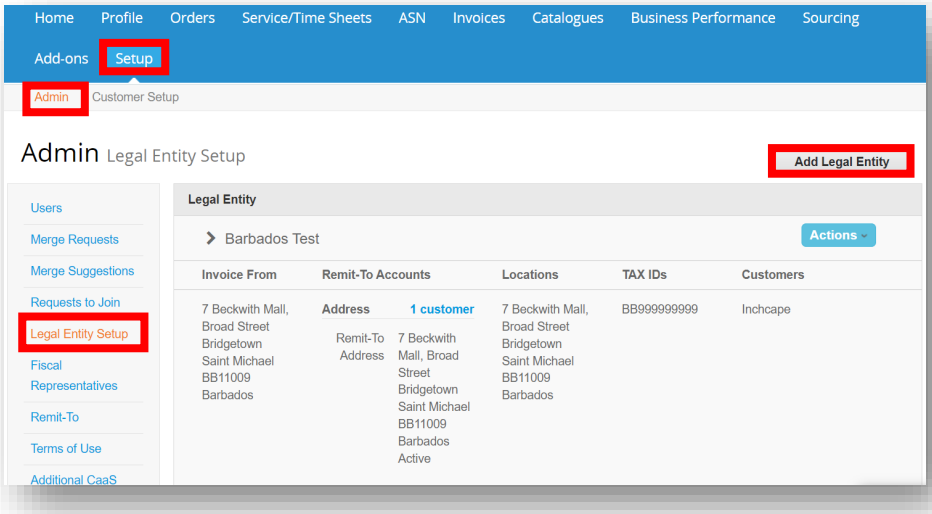
Set Up a CSP Account
Set Up a Legal Entity
Modify a Legal Entity
Add Additional Users
Troubleshooting: Customers Not Visible in CSP
Create an Invoice in the CSP
Create an Invoice using SAN (Supplier Actionable Notifications)
Raise a Credit Note

© Inchcape 2023. All Rights Reserved

Supplier Activities

Setup CSP Account

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



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

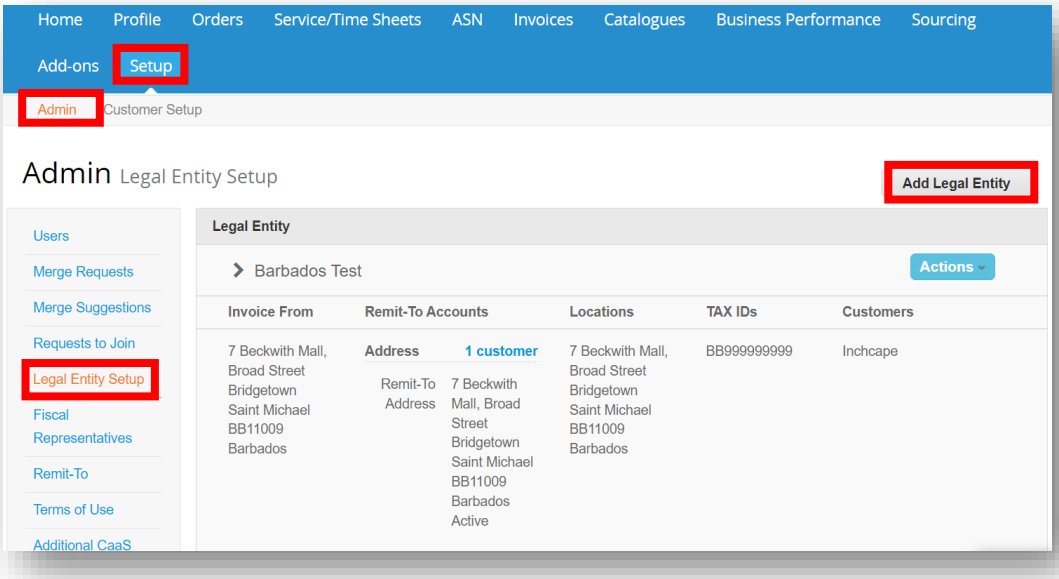
© Inchcape 2023. All Rights Reserved

Supplier Activities

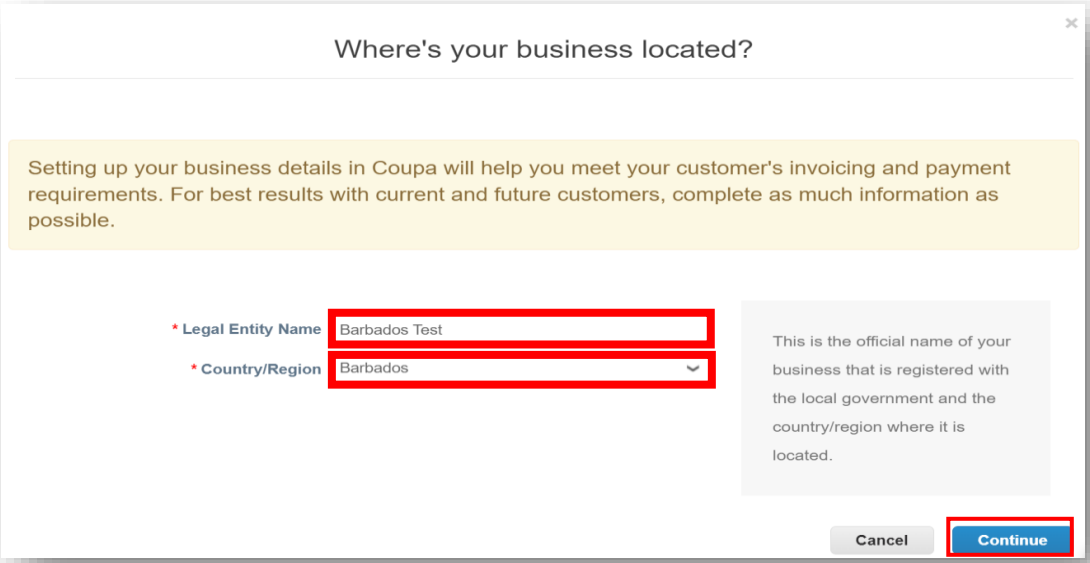
Setting up Legal Entity

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



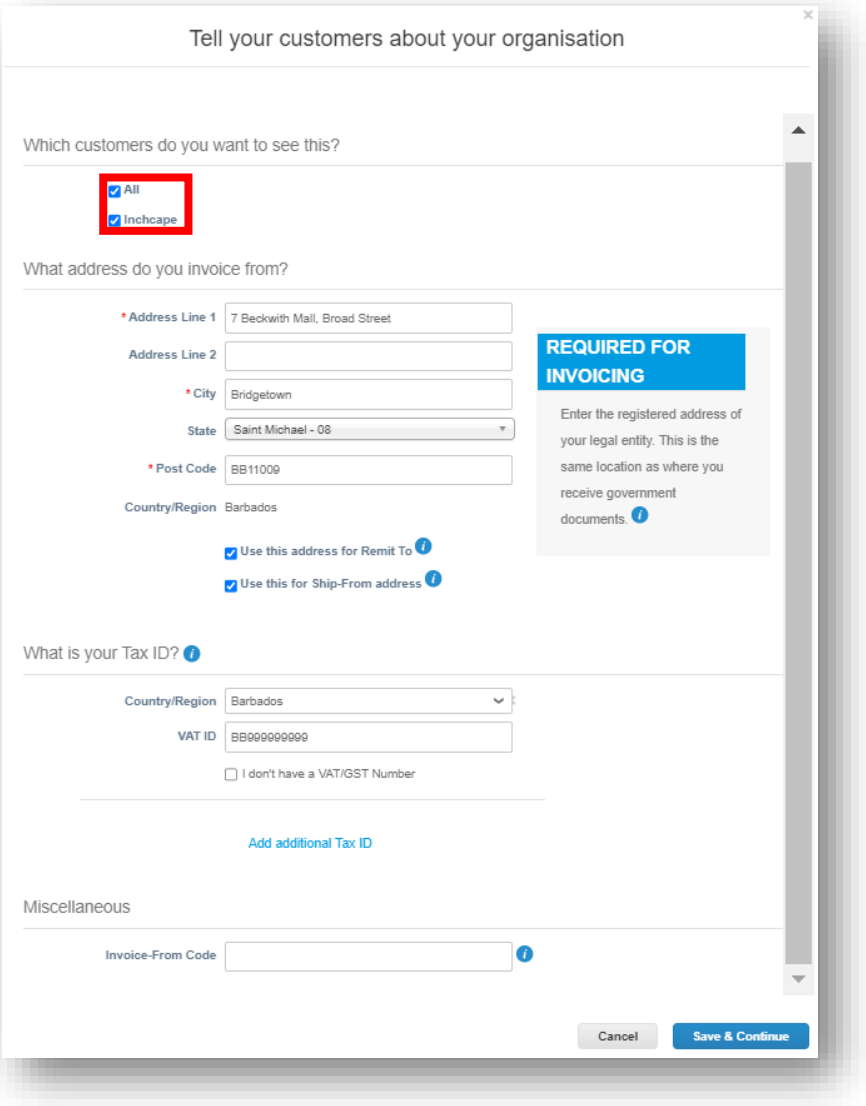
5. Enter your **Legal Entity Name**
6. Select your **Country**
7. Click **Continue**



© Inchcape 2023. All Rights Reserved

Supplier Activities

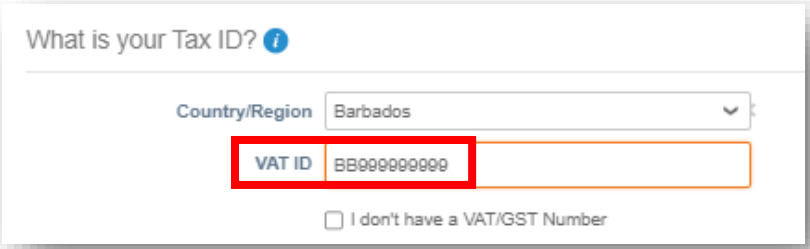
8. Tick **ALL** so you can view all Inchcape entities
9. Enter your registered Office address
10. Tick **Use this address for…** AND **Use this for Ship….** boxes. This will save you from having to enter your address multiple times



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

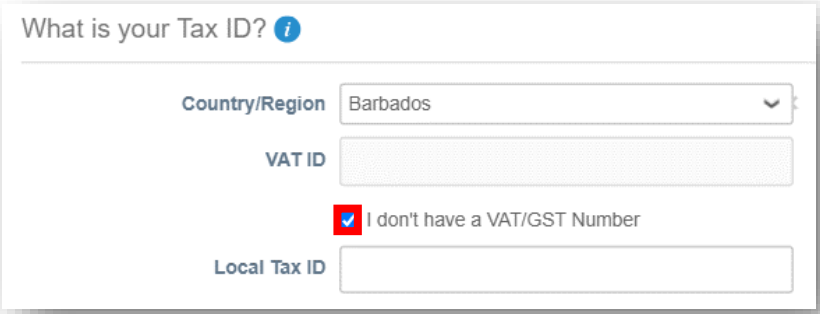
© Inchcape 2023. All Rights Reserved

Supplier Activities



Not VAT registered?

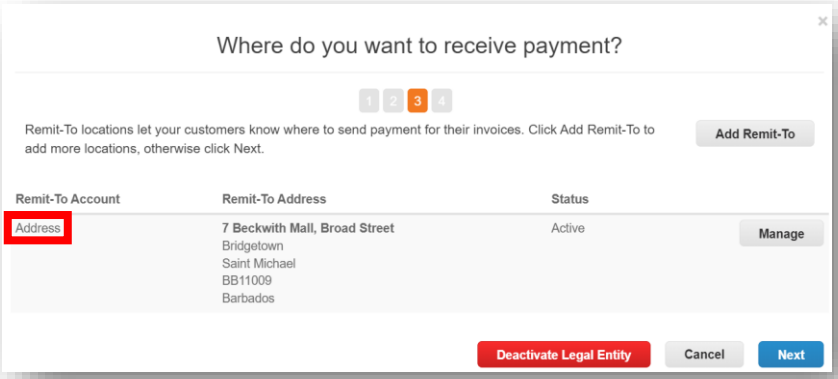
- If tax is not registered, tick the box next to "I don't have a VAT/GST Number". The field that appears below is a required field so enter 000 to move to the next step



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

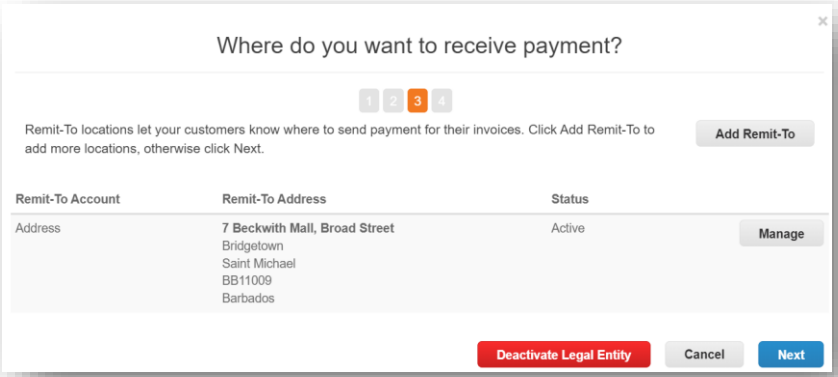
12. Choosing **Address** as the payment type means you do not have to enter any bank details. Remittances will continue to be emailed to you as normal



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

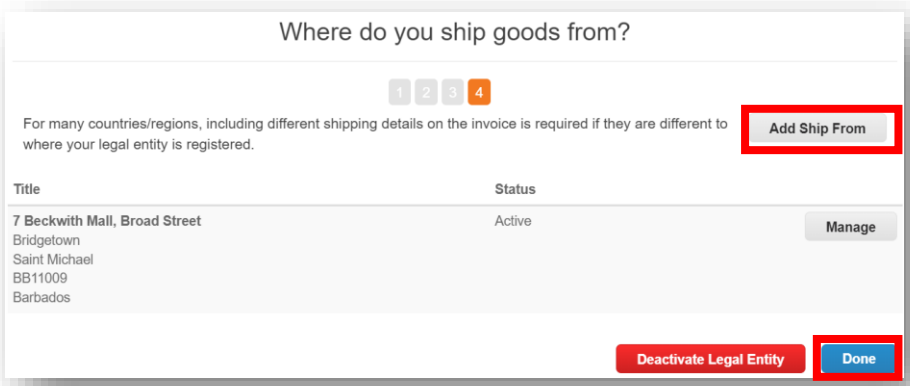
© Inchcape 2023. All Rights Reserved

Supplier Activities



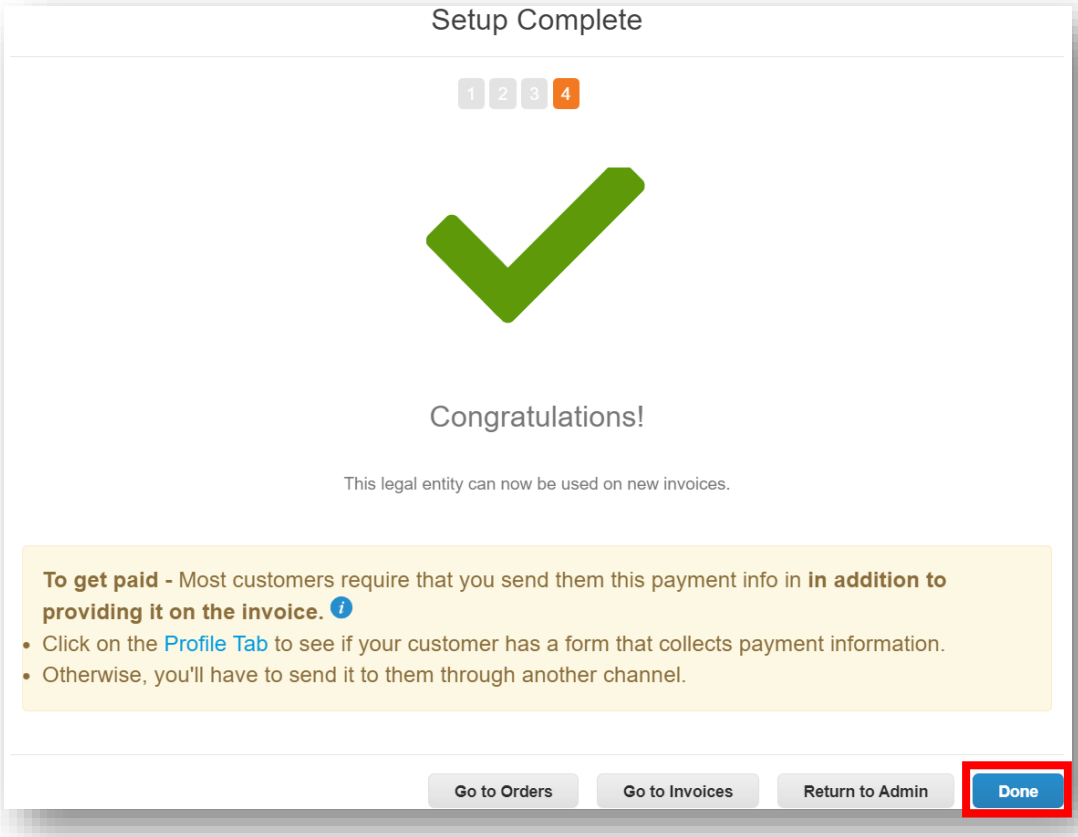
14. If the address where you ship goods from is different from your registered office address, you can add a separate 'Ship From' address

    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



© Inchcape 2023. All Rights Reserved

Supplier Activities

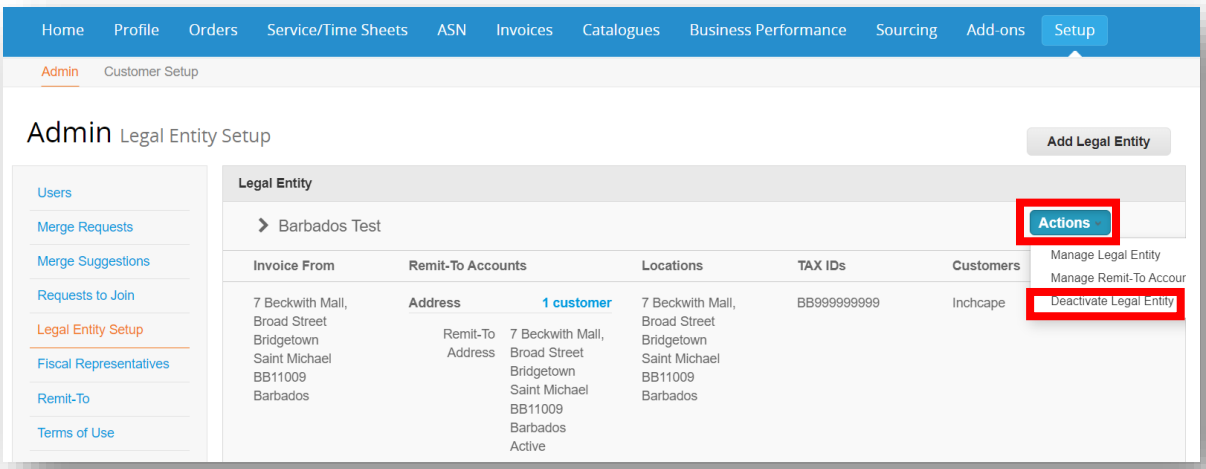


NOTES

- 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

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



© Inchcape 2023. All Rights Reserved

Inchcape

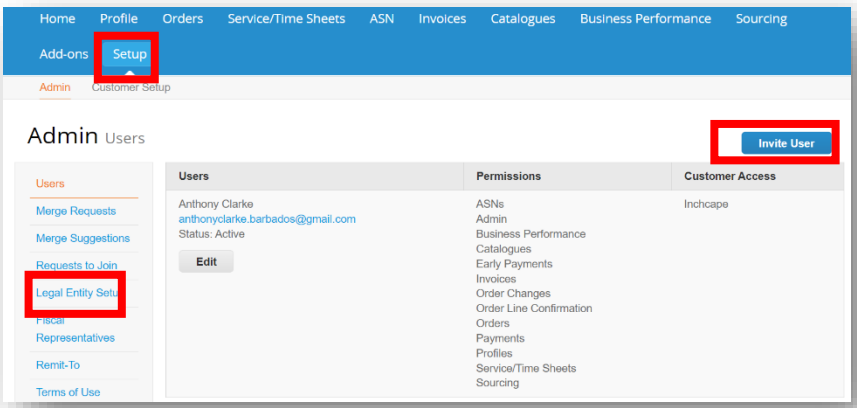
Supplier Activities

Add Addtional 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

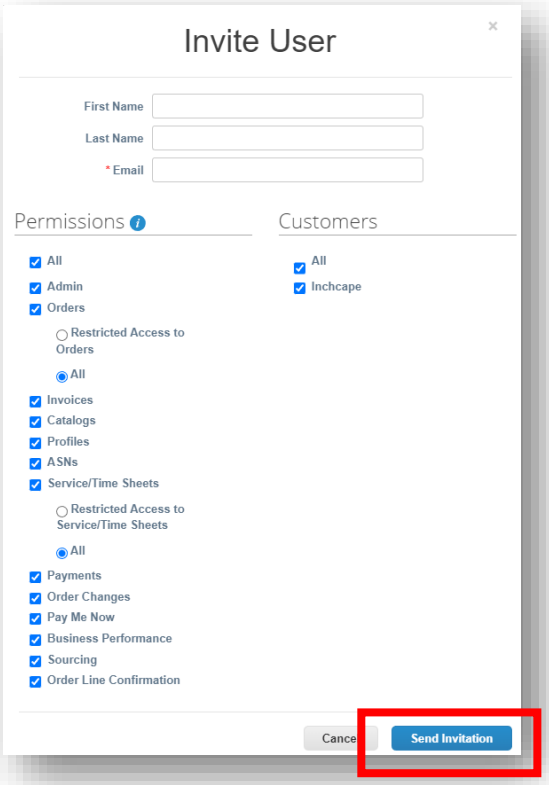
2. Enter **First Name**, **Last Name** and **Email**
3. Select the relevant user **Permissions**.



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.

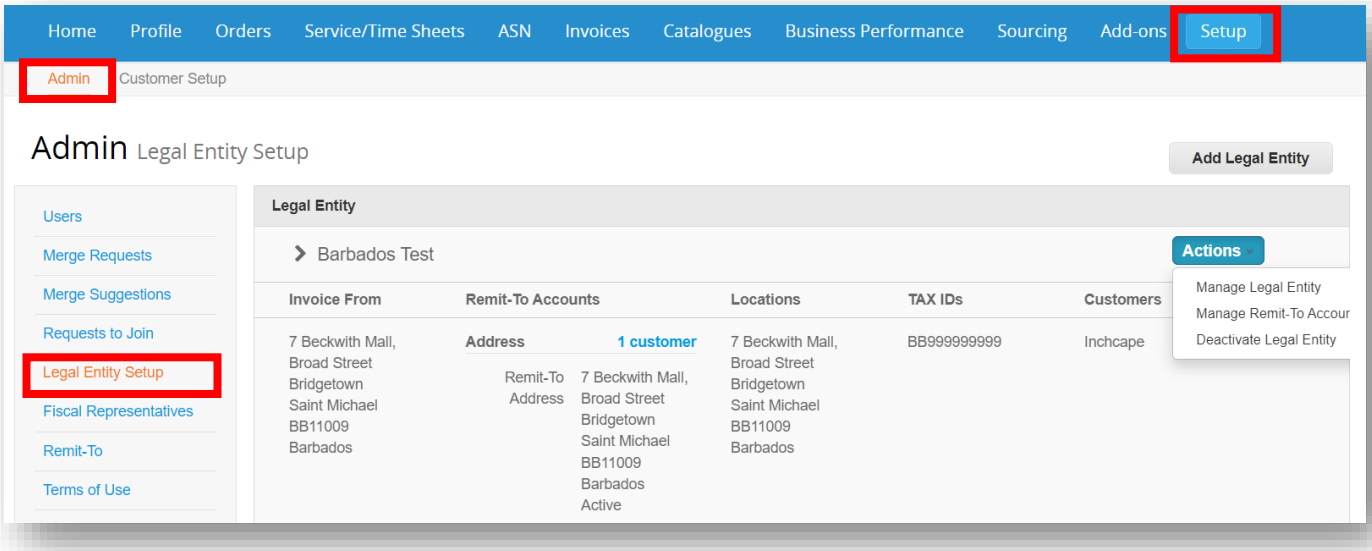


© Inchcape 2023. All Rights Reserved

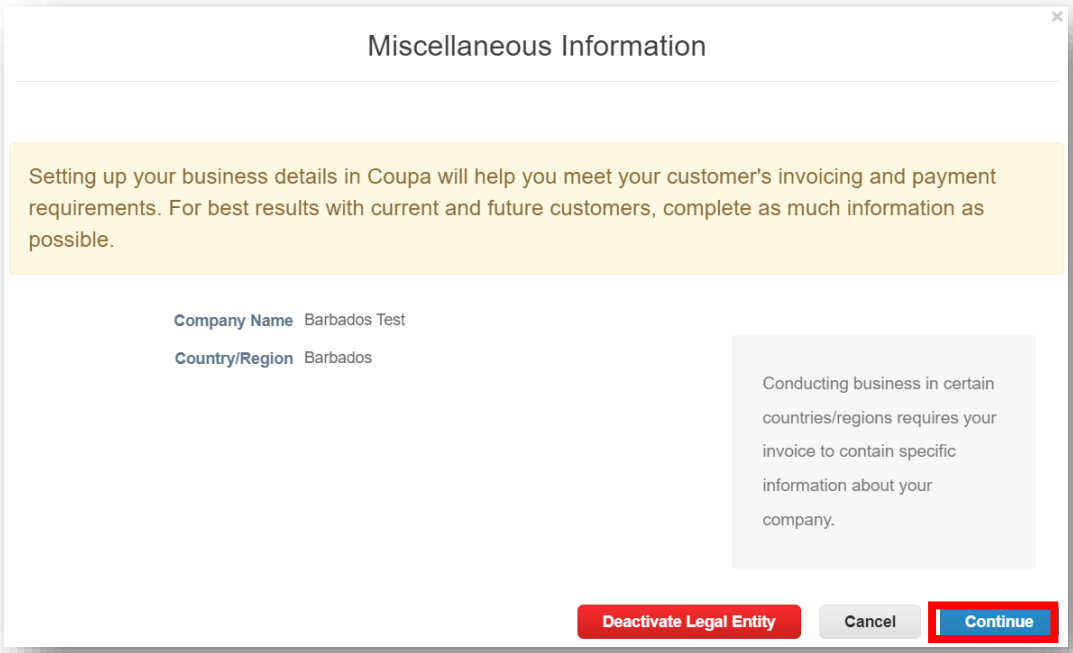
Customers Not Visible in CSP

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**



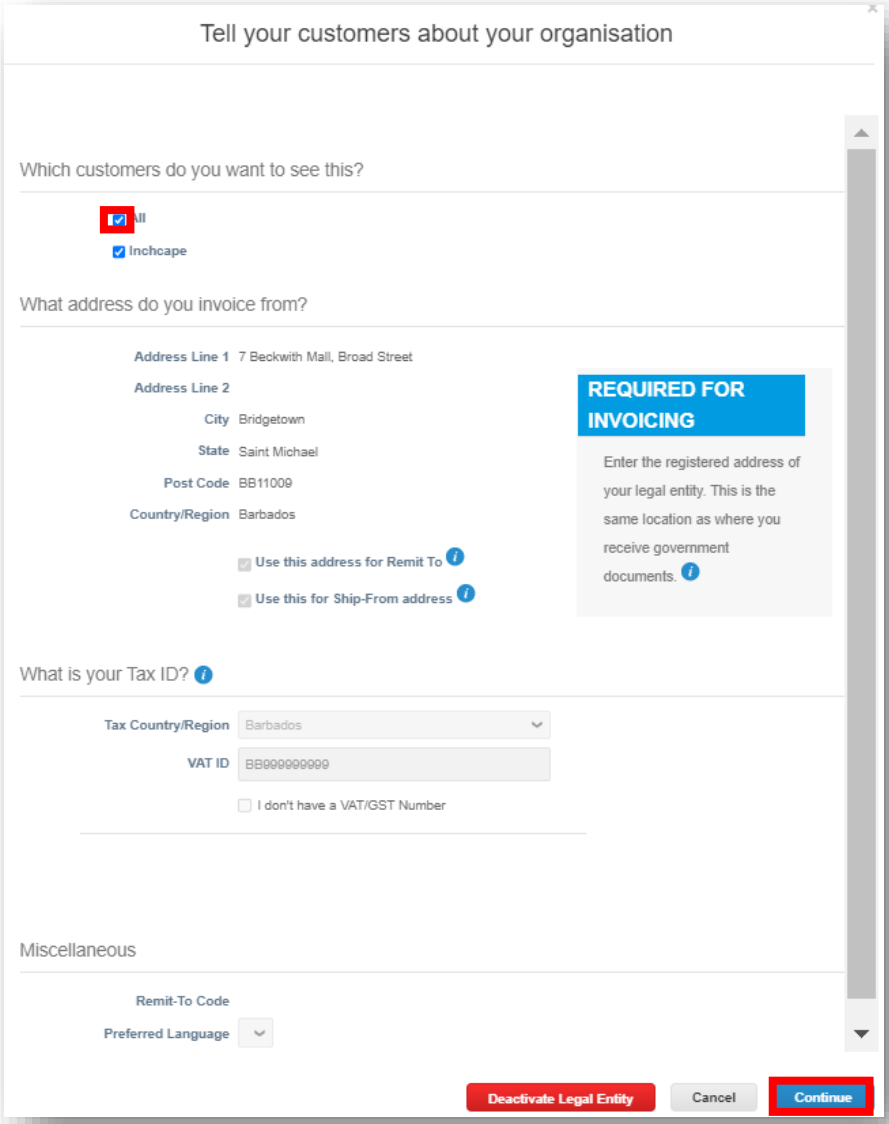
5. Click **Save & Continue**



© Inchcape 2023. All Rights Reserved

Supplier Activities

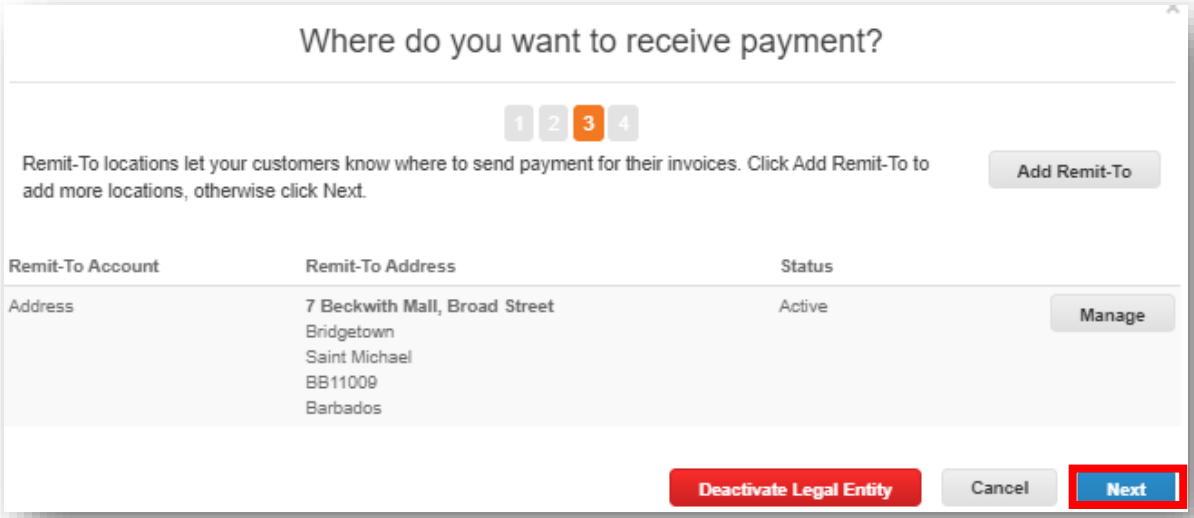
6. Make sure **All** is ticked then scroll to the bottom of the page and click **Continue**



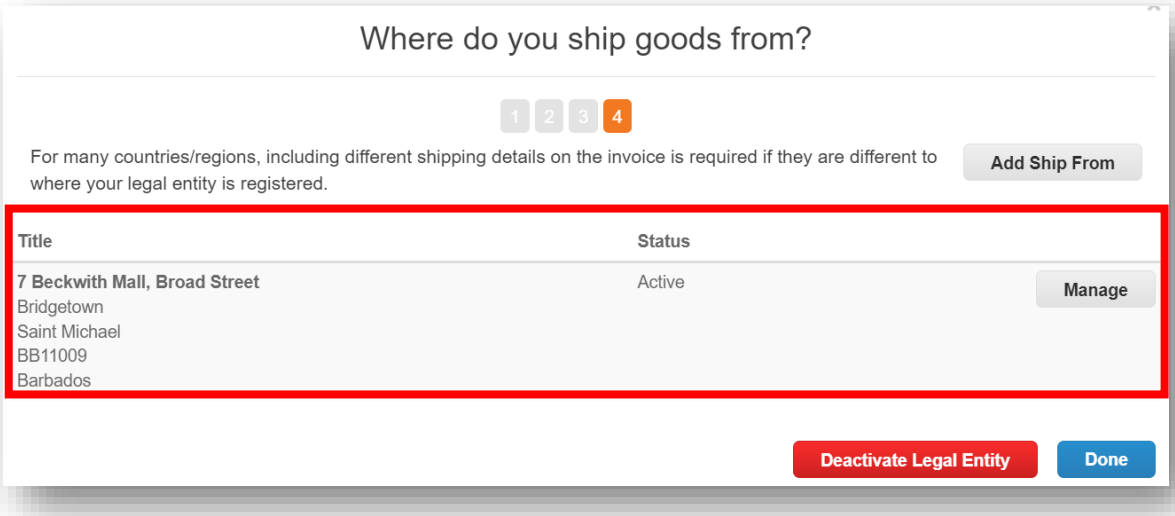
© Inchcape 2023. All Rights Reserved

Supplier Activities

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



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



© Inchcape 2023. All Rights Reserved

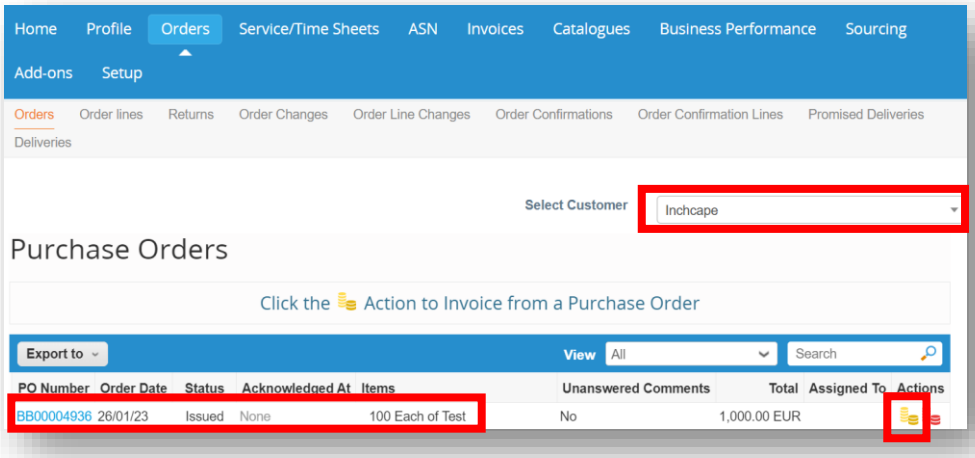
COUPA QUICK REFERENCE GUIDE

Inchcape

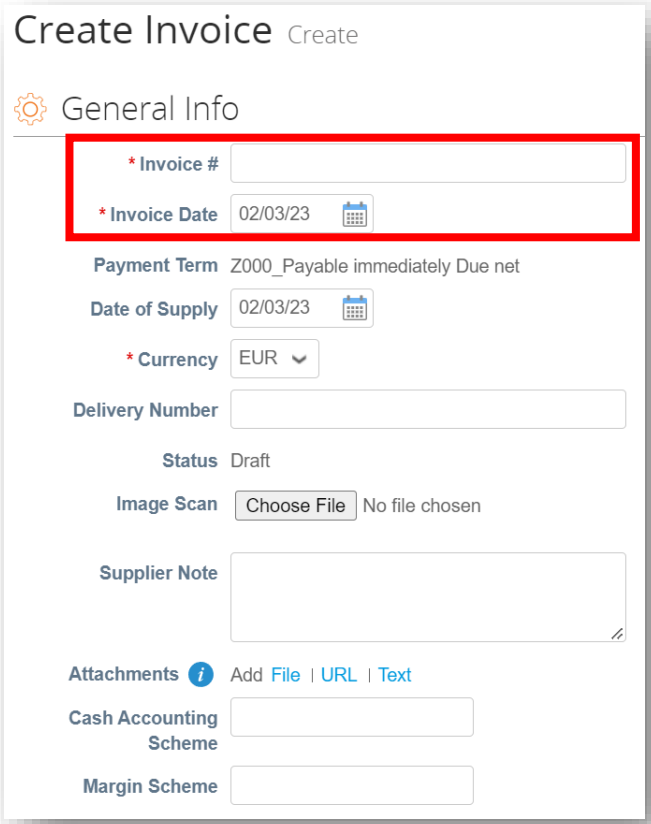
Supplier Activities

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.



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



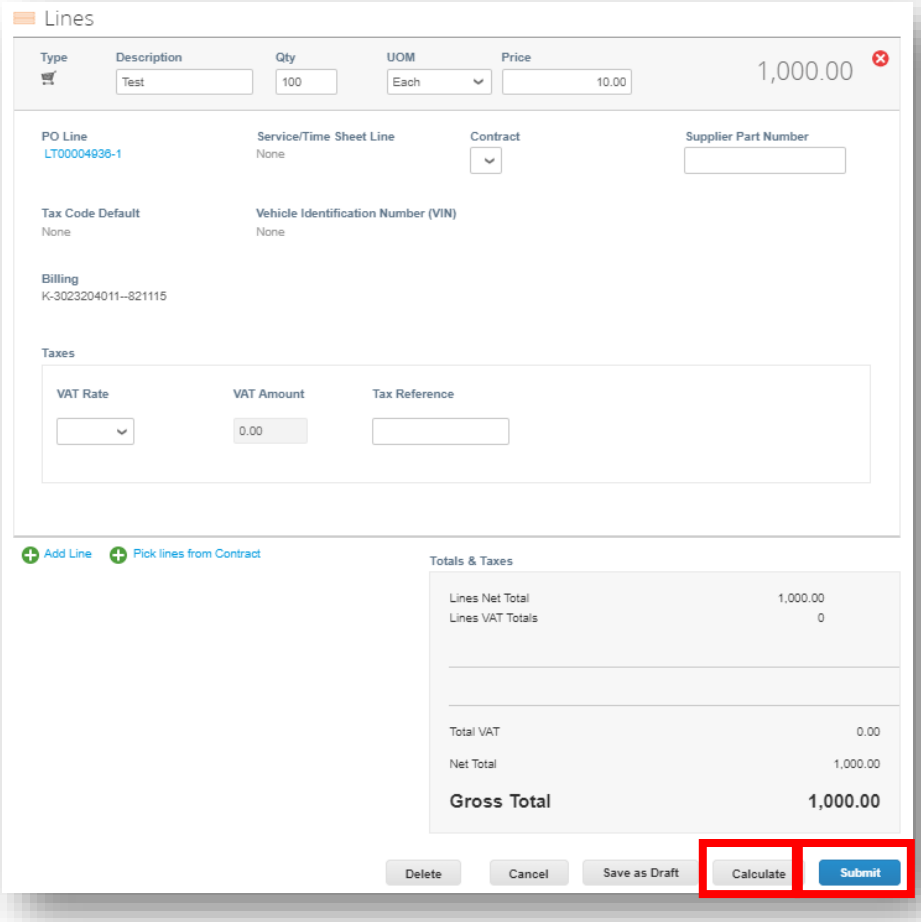
NOTES

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

© Inchcape 2023. All Rights Reserved

Supplier Activities

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



© Inchcape 2023. All Rights Reserved

Supplier Activities

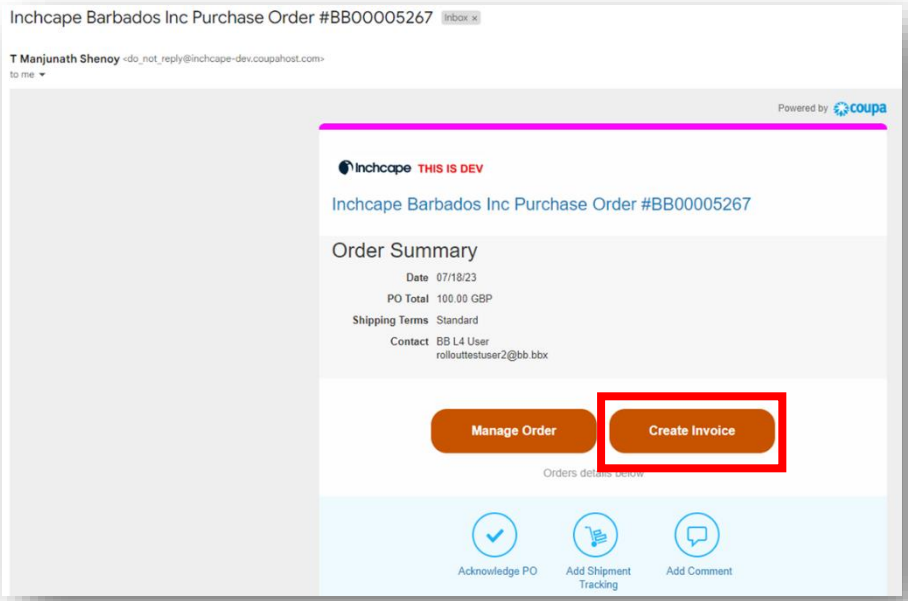
Invoicing using SAN (Supplier Actionable Notifications)

What is SAN?

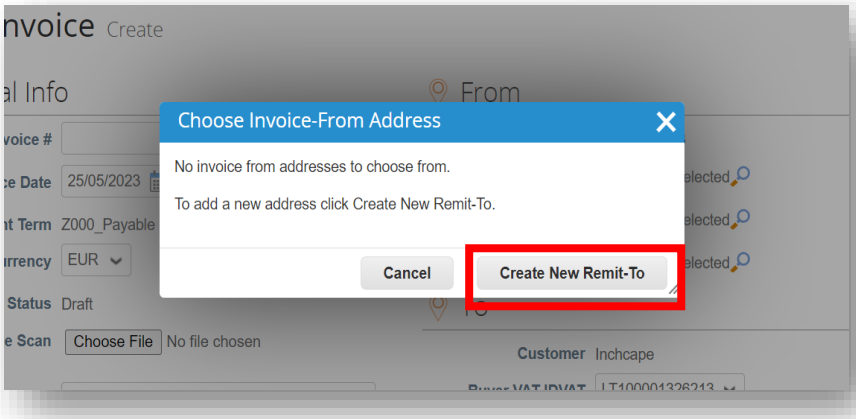
Supplier Actionable Notification (SAN) is one of the e-Invoicing channels that can push Invoices from the suppliers directly into Coupa. Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications for POs created in Coupa, giving the option to **create an Invoice**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



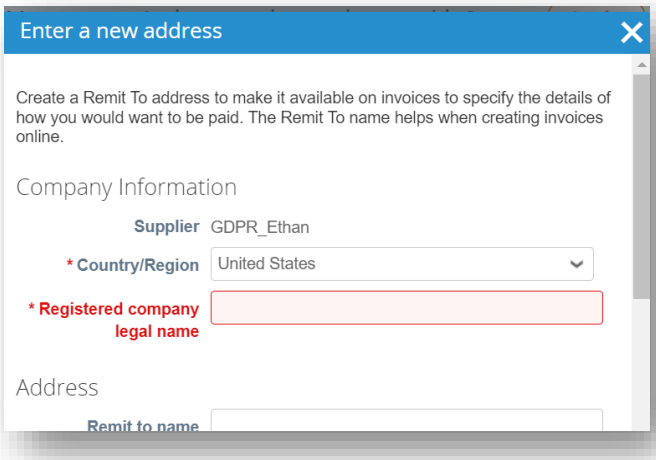
3. Before you can create an Invoice, you must create a new **Remit-to** address



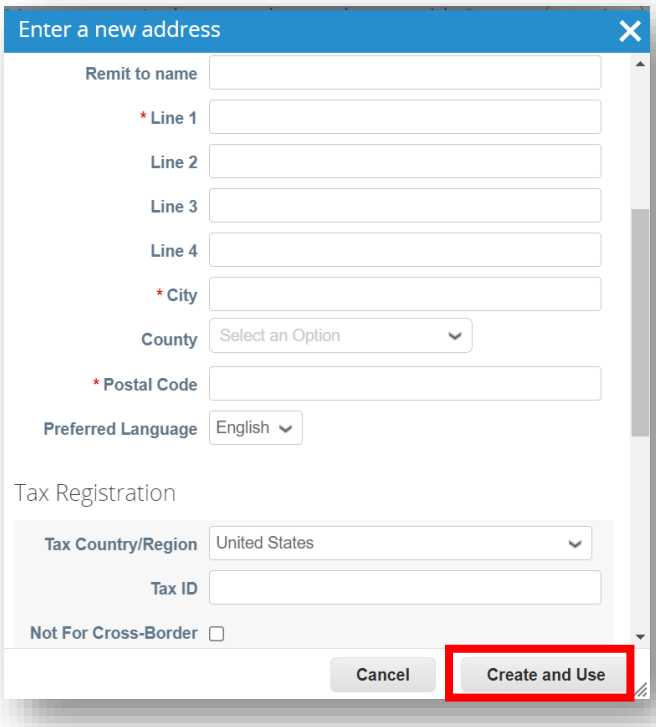
© Inchcape 2023. All Rights Reserved

Supplier Activities

4. Fill in the required details



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



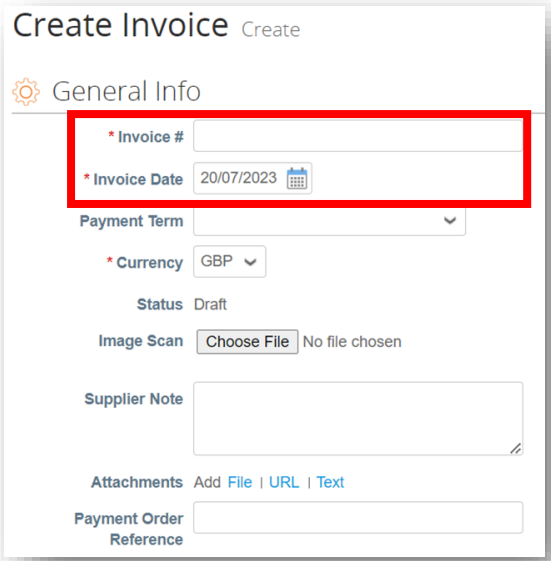
NOTES

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

© Inchcape 2023. All Rights Reserved

Supplier Activities

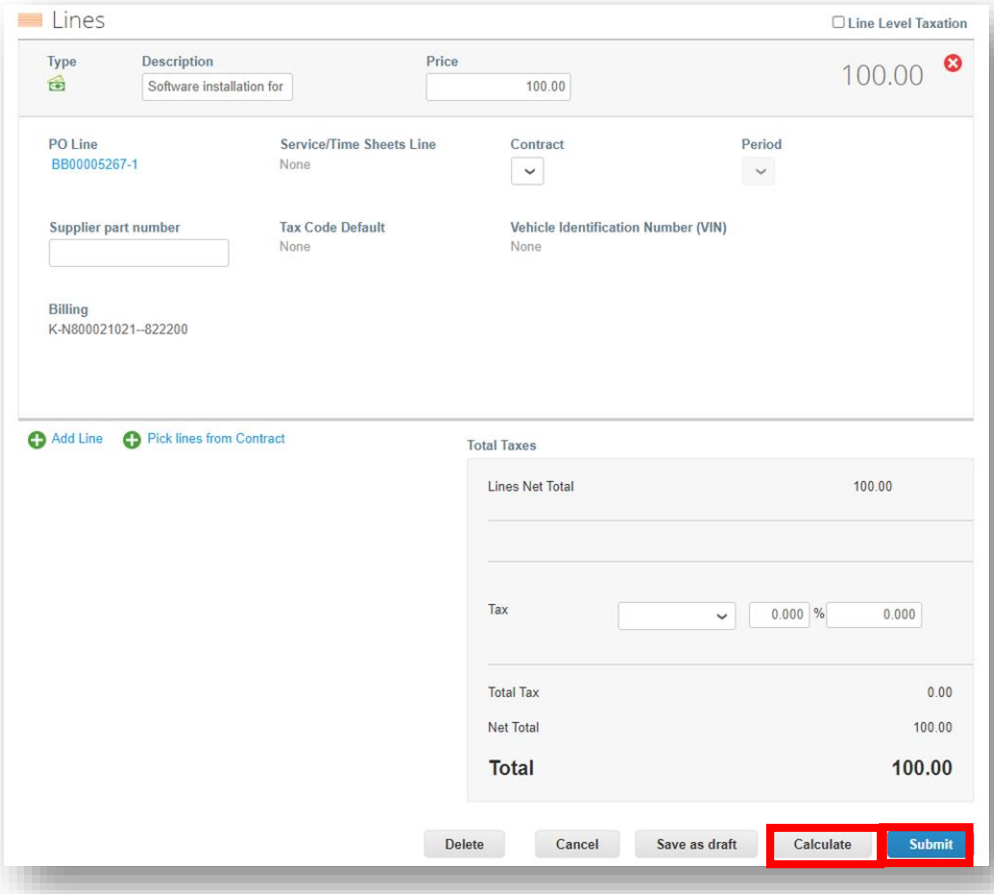
6. Enter the unique **Invoice #, Invoice date**



NOTES

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

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



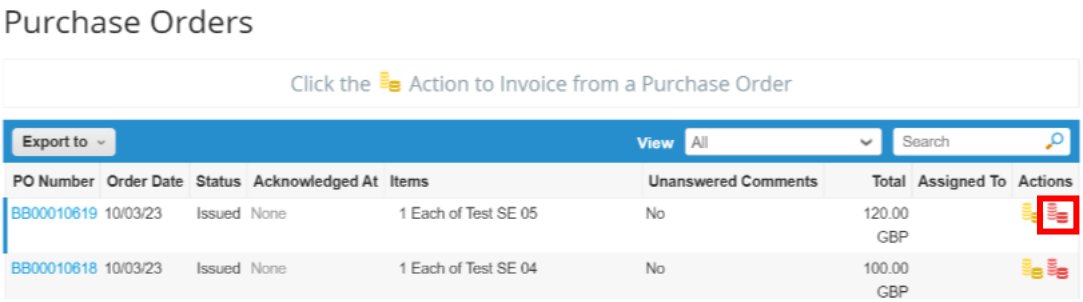
NOTES

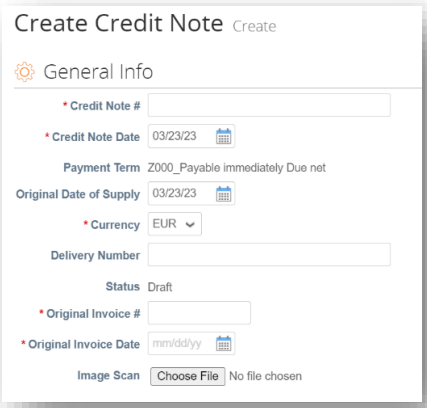
- Please ensure the Invoice Date is changed to the Tax date of the invoice. Do not leave it as the submission date as this will cause delays to your payments
- Select an invoice attachment in PDF format in the Image Scan section

© Inchcape 2023. All Rights Reserved

Raise Credit Note - Option 1

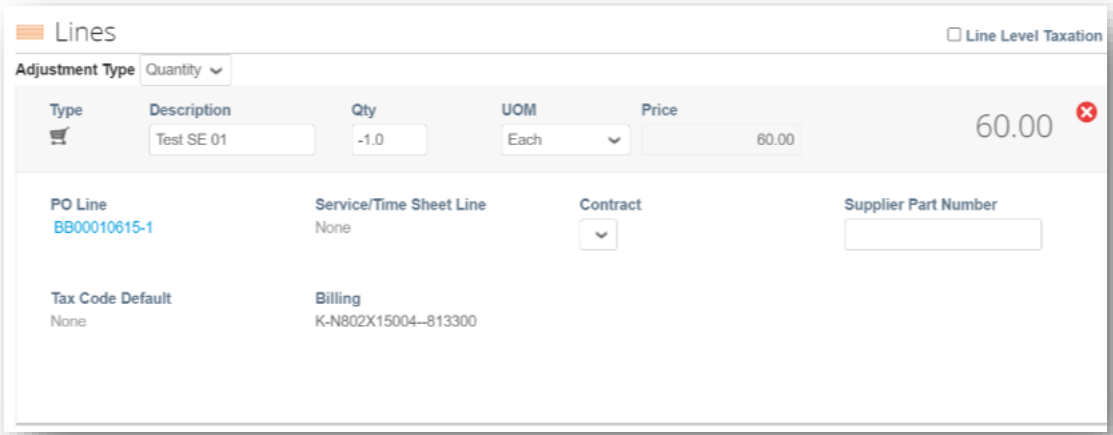
1. Go to **Orders** tab from Home Page, locate the PO and click on **Red Coins** icon against it





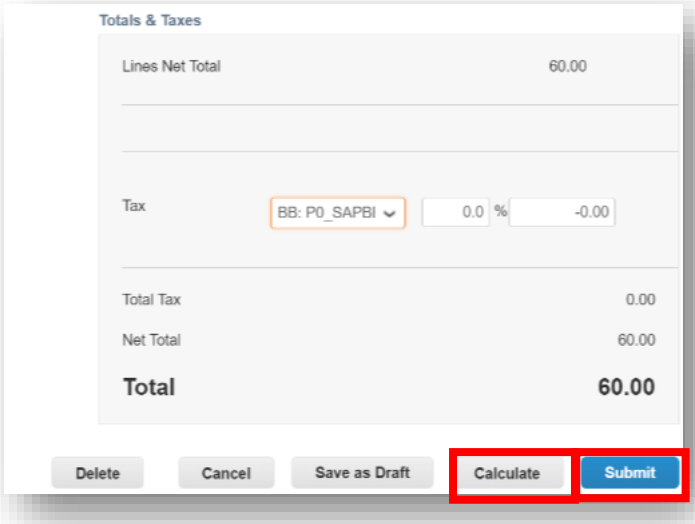
2. Complete the mandatory fields:
Credit Note #, **Credit Note Date**, **Currency**, **Original Invoice #** and **Original Invoice Date**,

3. Complete the relevant fields,



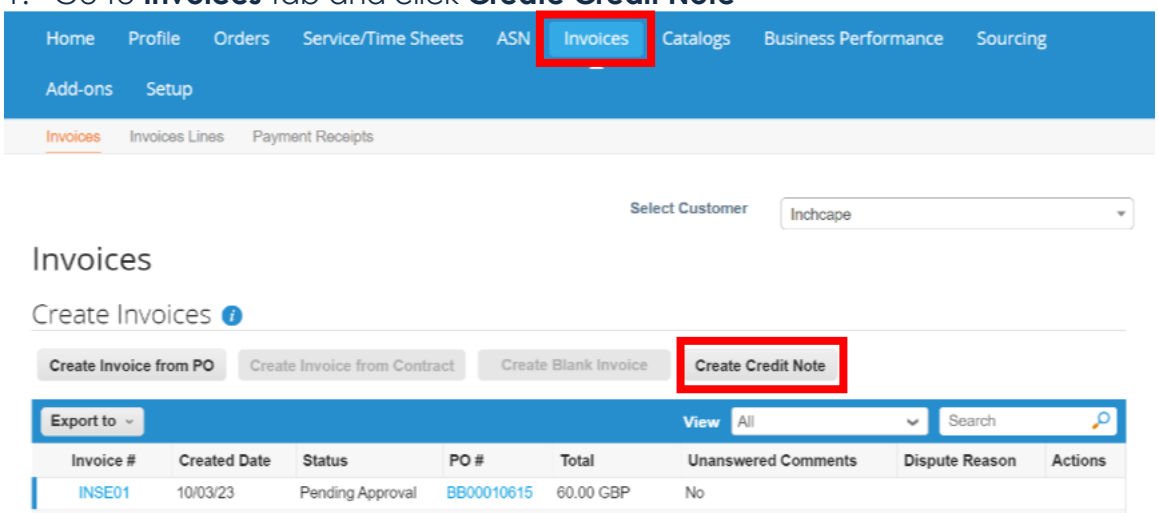
© Inchcape 2023. All Rights Reserved

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



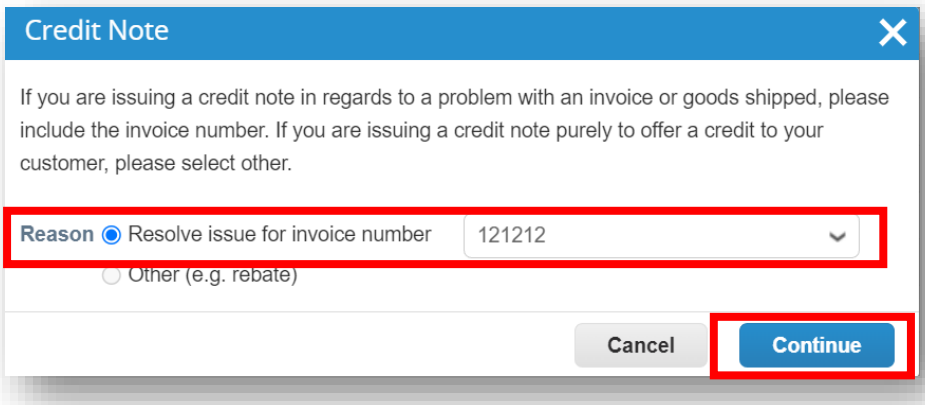
Raise Credit Note - Option 2

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



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

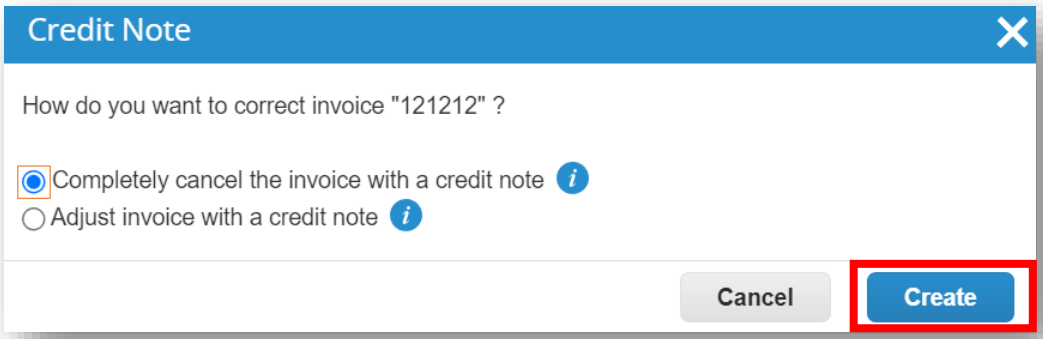
2. Select the Invoice from the drop-down and click **Continue**



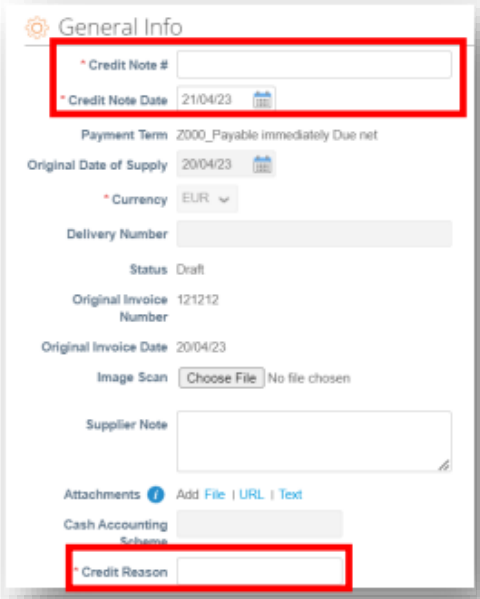
© Inchcape 2023. All Rights Reserved

Supplier Activities

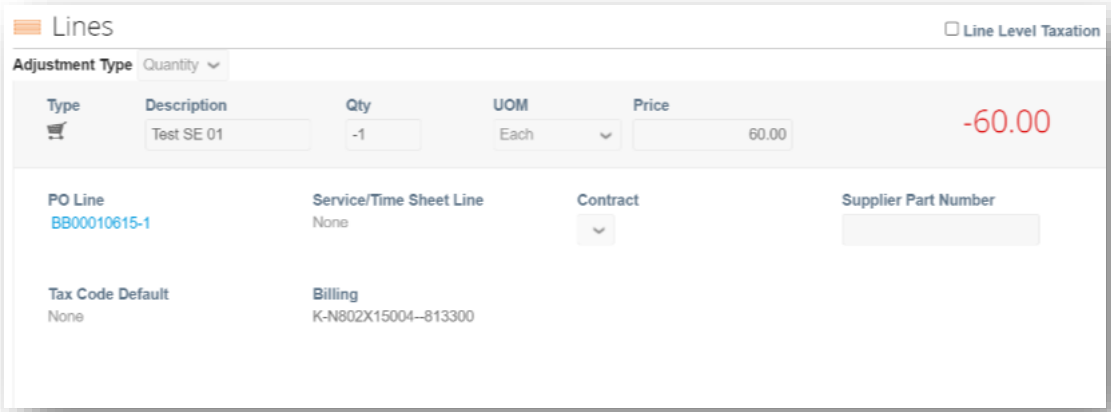
3. Choose how you want to correct the Invoice and click **Create**



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



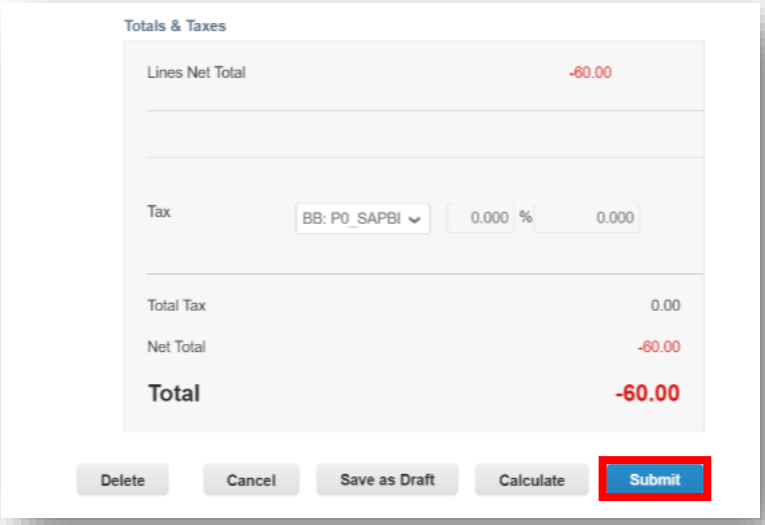
NOTES
You can attach Credit Note copy in **Image Scan** field and attach additional documents in **Attachments** field



© Inchcape 2023. All Rights Reserved

Supplier Activities

5. Click **Submit**



© Inchcape 2023. All Rights Reserved