COUPA
QUICK REFERENCE GUIDE

Supplier Activities

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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
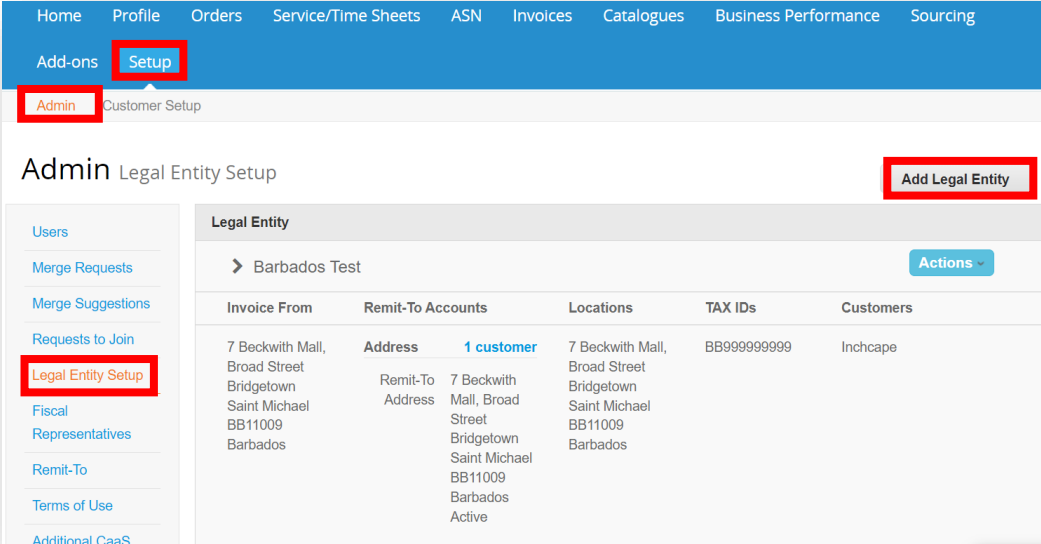
Supplier Activities

Setting up Legal Entity

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

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

> Barbados Test   Actions ⌄

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

Users
Merge Requests
Merge Suggestions
Requests to Join
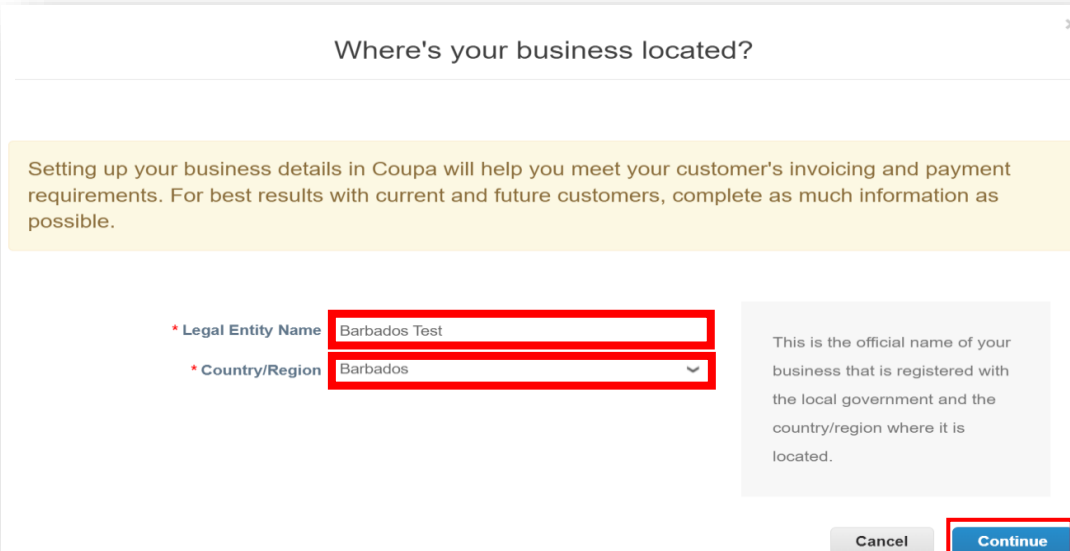Legal Entity Setup
Fiscal Representatives
Remit-To
Terms of Use
Additional CaaS

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.
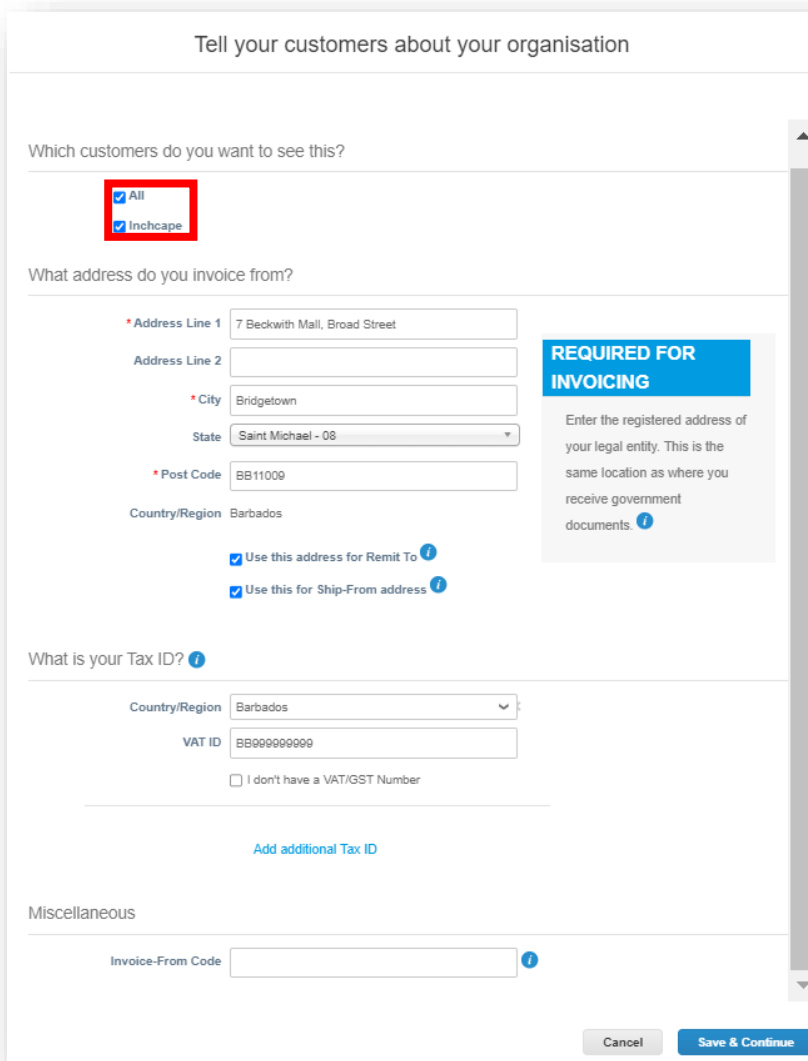
* Legal Entity Name   Barbados Test

* Country/Region   Barbados

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

Cancel   Continue

Inchcape

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	7 Beckwith Mall, Broad Street
Address Line 2	
* City	Bridgetown
State	Saint Michael - 08
* Post Code	BB11009
Country/Region	Barbados

REQUIRED FOR INVOICING

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

☑ Use this address for Remit To ⓘ
☑ Use this for Ship-From address ⓘ

What is your Tax ID? ⓘ

Country/Region	Barbados
VAT ID	BB999999999

☐ I don't have a VAT/GST Number

Add additional Tax ID
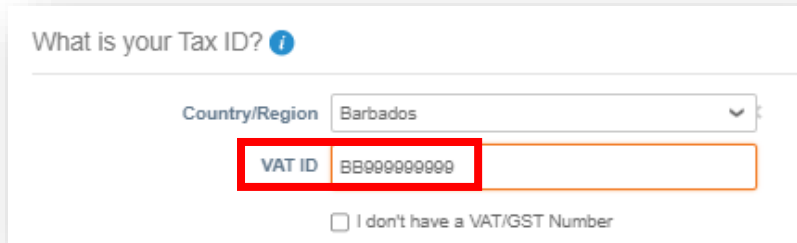
Miscellaneous

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
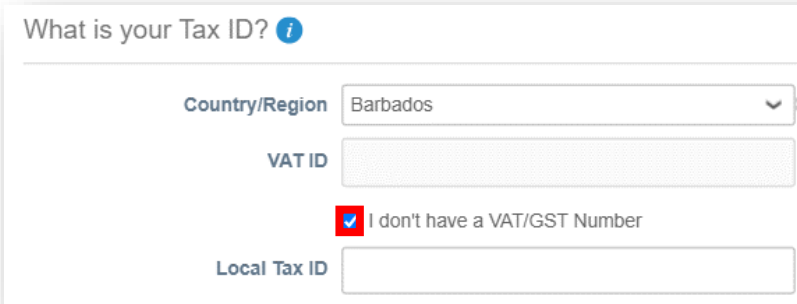
Supplier Activities

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
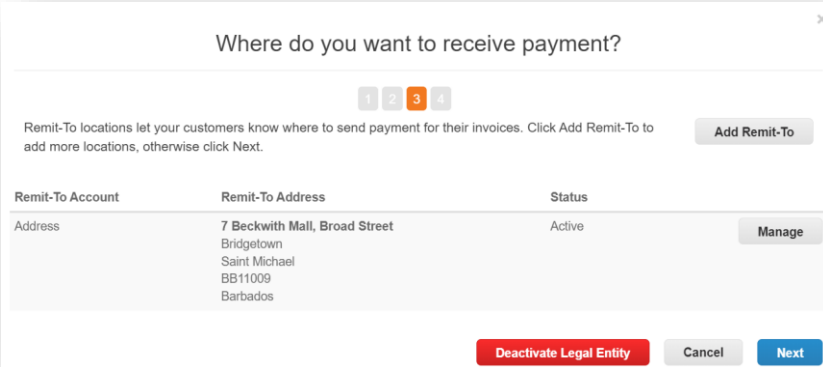

13. Payments will continue to be made via your bank account, Coupa will not change the payment process

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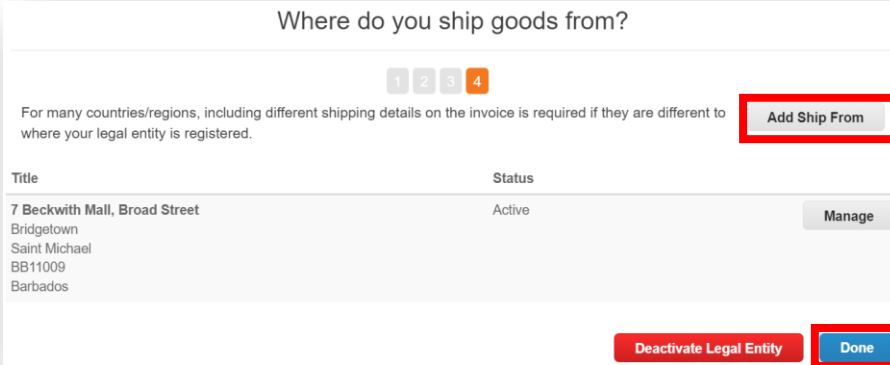
14. If the address where you ship goods from is different from your registered office address, you can add a separate 'Ship From' address

    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

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.** ℹ️
- 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

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

| 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

❯ Barbados Test   **Actions**

|					Manage Legal Entity
Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers	Manage Remit-To Accoun
					Deactivate Legal Entity
7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	**Address** Remit-To Address	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados	BB999999999	Inchcape
	1 customer	7 Beckwith Mall, Broad Street Bridgetown Saint Michael BB11009 Barbados Active			

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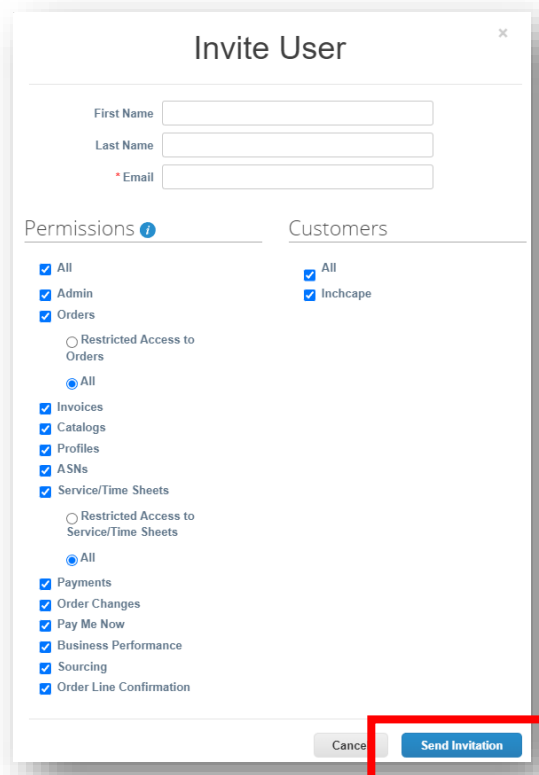
1. To add additional users, click on the Setup tab, then click Users

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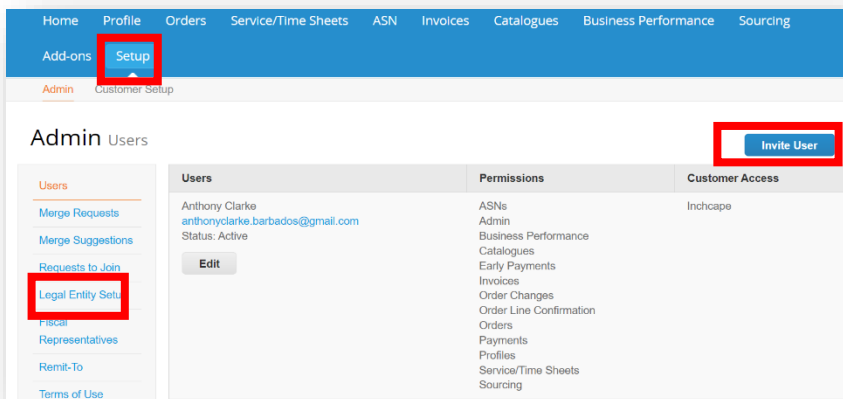
4. Click **Send Invitation**
5. The person you have added as a user will receive an invitation to join your company portal
6. Additional users are not required to provide any company information or set up a legal entity. They are added to your company's Coupa portal which is already setup.

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 | Catalogues | Business Performance | Sourcing | Add-ons | 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 |

Legal Entity

> Barbados Test

Actions
- Manage Legal Entity
- Manage Remit-To Accour
- Deactivate Legal Entity

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. Click **Save & Continue**

Miscellaneous Information

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 Barbados Test

Country/Region Barbados

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

Deactivate Legal Entity   Cancel   Continue

Inchcape

Supplier Activities

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

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

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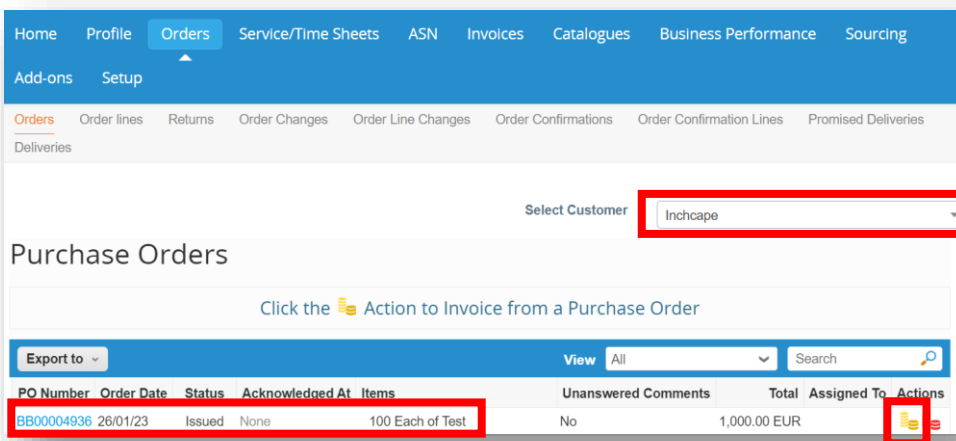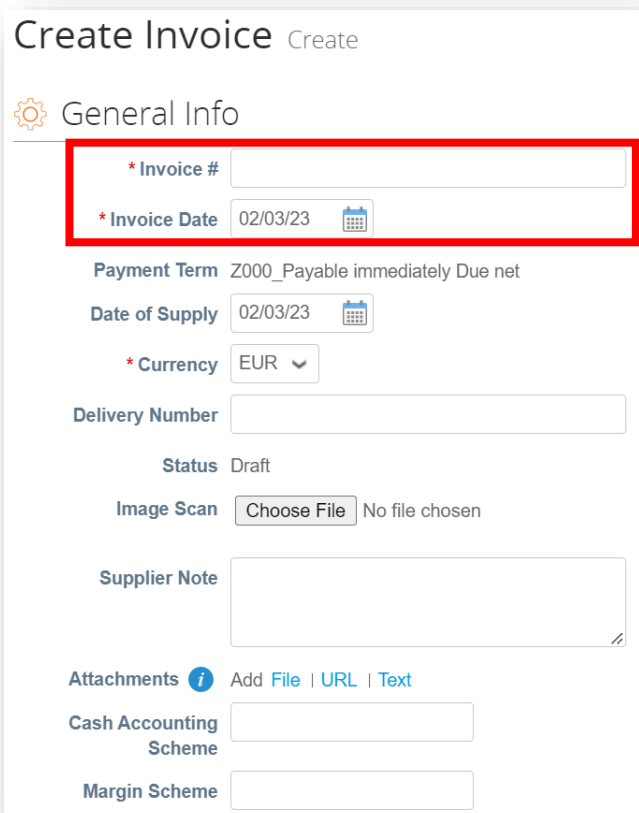
Supplier Activities

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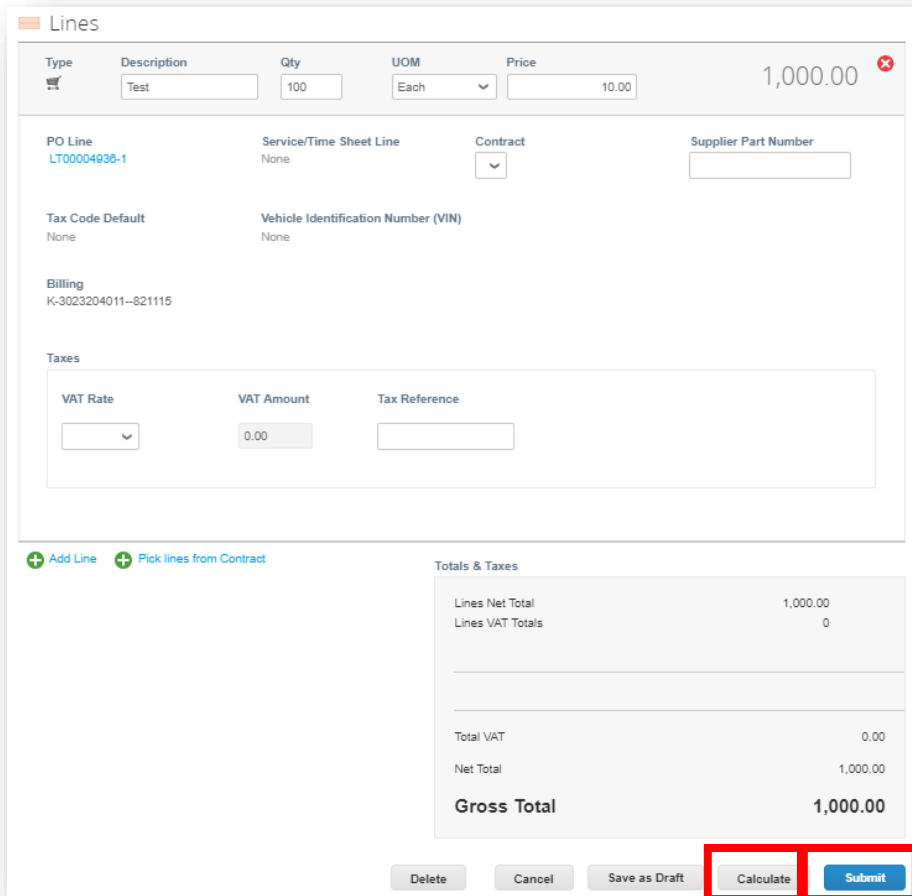
NOTES
The invoice date must be the same as the tax date on the invoice. Do not leave it as submission date as it will cause delays to your payments

Inchcape

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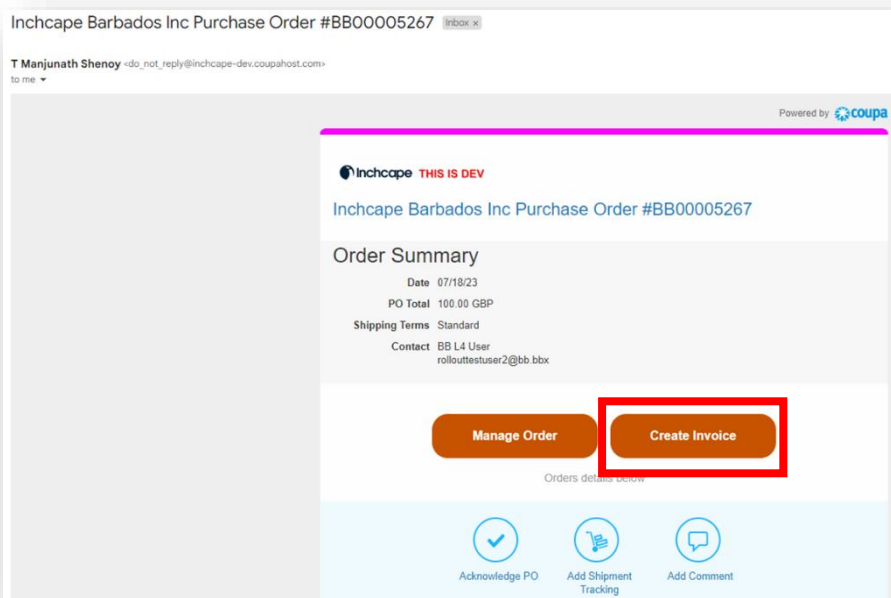
Supplier Activities

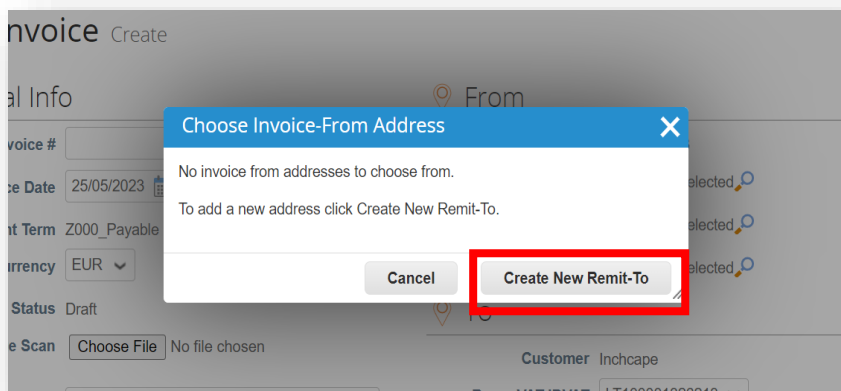# Invoicing using SAN (Supplier Actionable Notifications)

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**

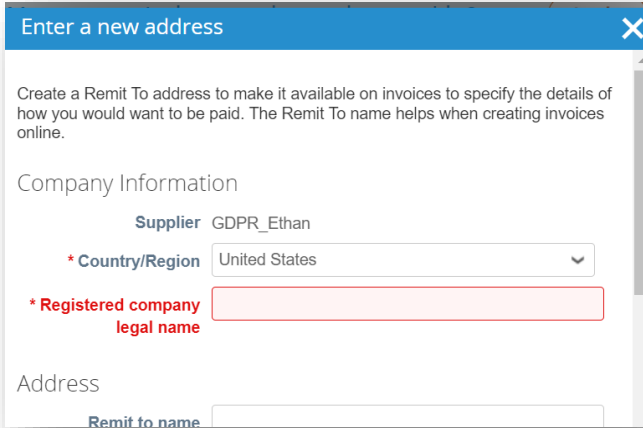3. Before you can create an Invoice, you must create a new **Remit-to** address

4. Fill in the required details
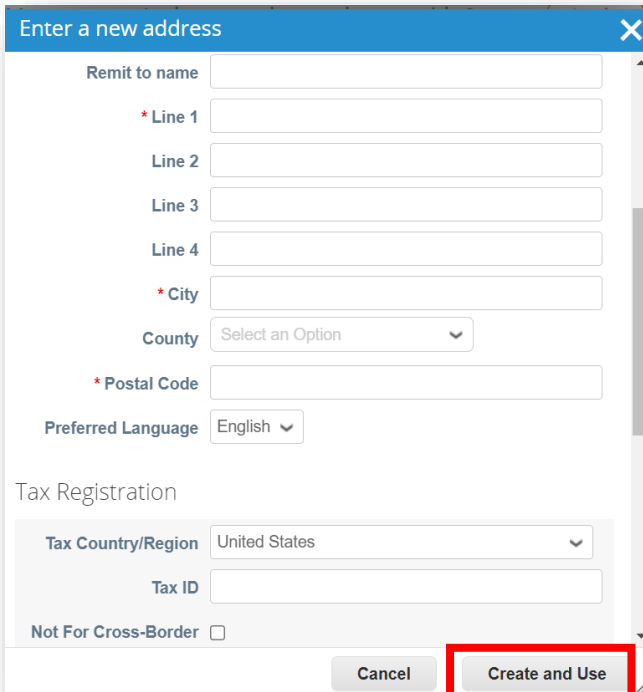
5. Once filled, click **Create and Use**

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

Supplier Activities

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

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

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**
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	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

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

3. Complete the relevant fields,

🟧 Lines

☐ Line Level Taxation

Adjustment Type Quantity ▾

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

PO Line	**Service/Time Sheet Line**	**Contract**	**Supplier Part Number**
BB00010615-1	None	▾	

Tax Code Default	**Billing**
None	K-N802X15004--813300

Supplier Activities

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**

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 ⓘ
⚪ Adjust invoice with a credit note ⓘ

Cancel   **Create**

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 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	Choose File No file chosen
Supplier Note	
Attachments ⓘ	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   ☐ Line Level Taxation

Adjustment Type Quantity ⌄

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

PO Line	Service/Time Sheet Line	Contract	Supplier Part Number
BB00010615-1	None	⌄	

Tax Code Default	Billing
None	K-N802X15004--813300

5. Click **Submit**