

## **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](#)

[Merge Two Accounts](#)

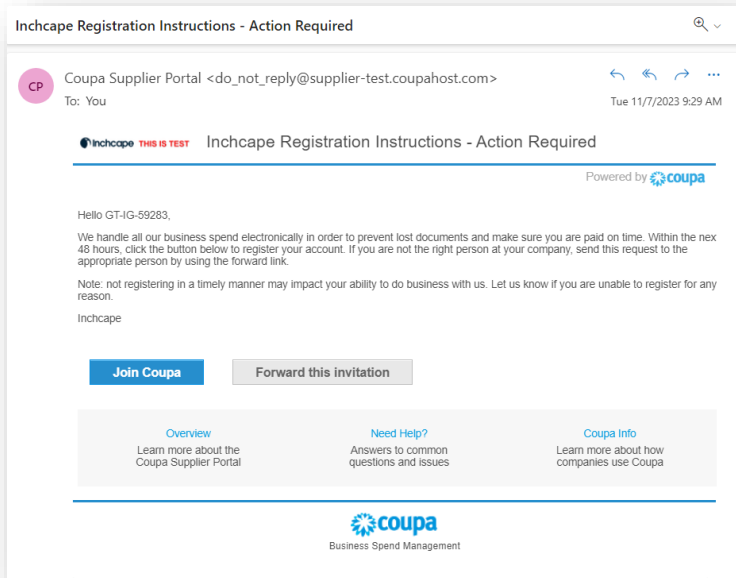
[Enable Multi-Factor Authenticator](#)

[Appendix](#)

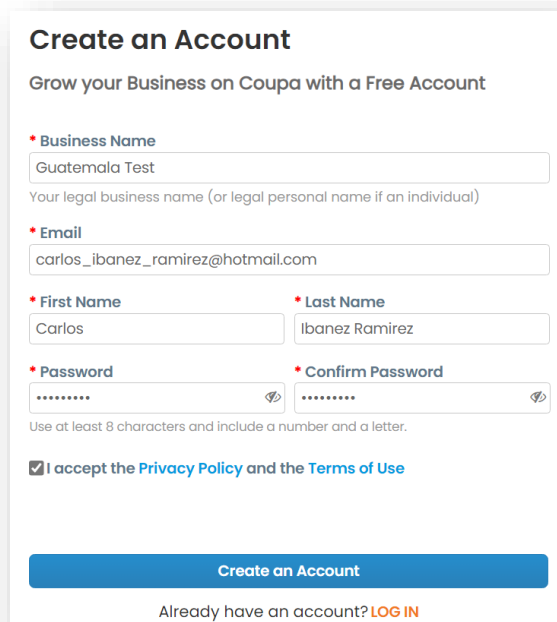
## Supplier Activities

### Setup CSP Account

1. To start the setup of your CSP account, you will receive a registration invite to join the portal



2. Click on **Join Coupa**
3. Provide the necessary information
4. Make sure to go through the **Privacy Policy** and the **Terms of use**
5. Click on **Create an Account**



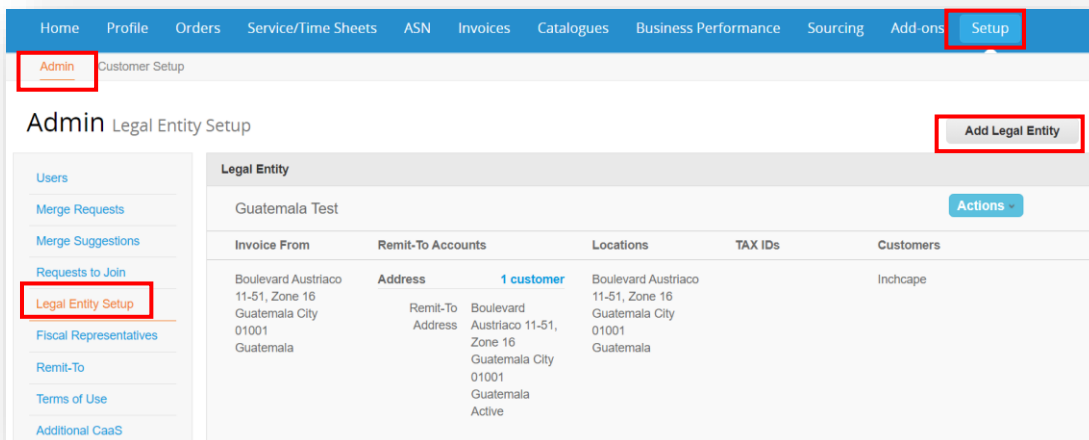
The 'Create an Account' form includes the following fields and options:

- Business Name:** Guatemala Test
- Email:** carlos\_ibanez\_ramirez@hotmail.com
- First Name:** Carlos
- Last Name:** Ibanez Ramirez
- Password:** [Redacted]
- Confirm Password:** [Redacted]
- I accept the [Privacy Policy](#) and the [Terms of Use](#)
- Create an Account** button
- Already have an account? [LOG IN](#)

## 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**

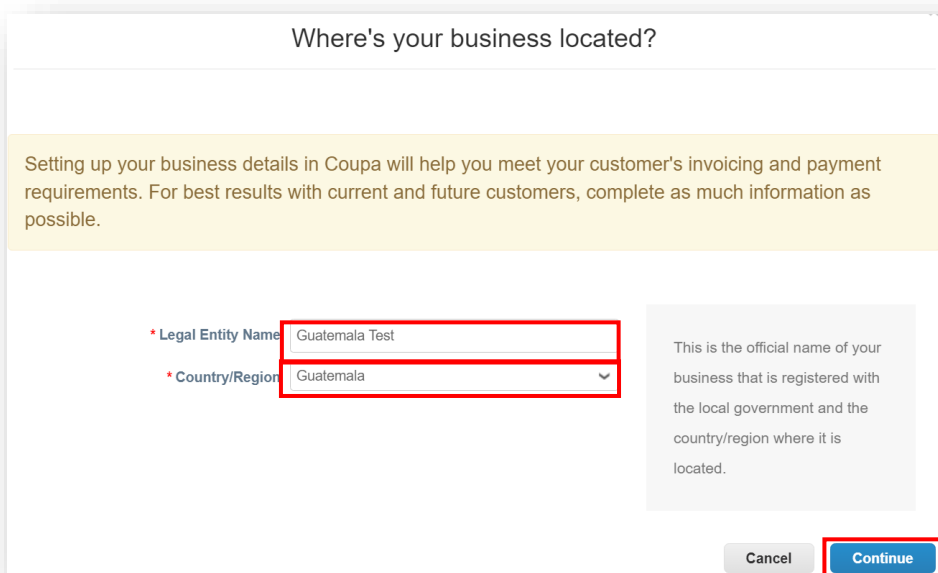


| Invoice From  | Remit-To Accounts   | Locations   | TAX IDs | Customers |
|---|---|---|---------|-----------|
| Boulevard Austriaco<br>11-51, Zone 16<br>Guatemala City<br>01001<br>Guatemala | Address<br>Remit-To Address<br>Boulevard Austriaco 11-51, Zone 16<br>Guatemala City<br>01001<br>Guatemala<br>Active | 1 customer<br>Boulevard Austriaco<br>11-51, Zone 16<br>Guatemala City<br>01001<br>Guatemala |         | Inchcape  |

#### 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**



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.

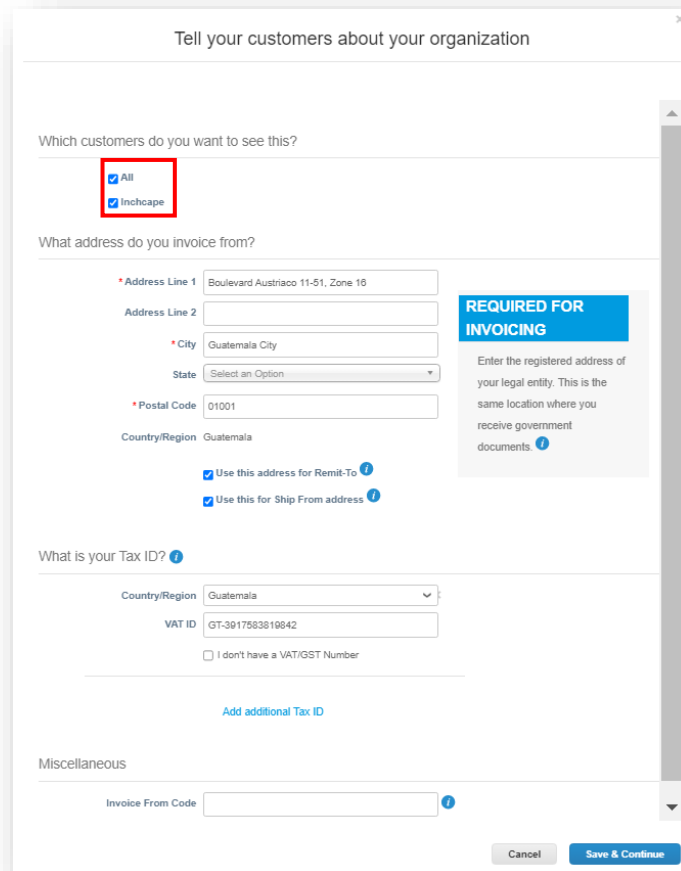
\* Legal Entity Name

\* 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   
Address Line 2   
\* City   
State   
\* Postal 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 where you receive government documents.

What is your Tax ID?

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

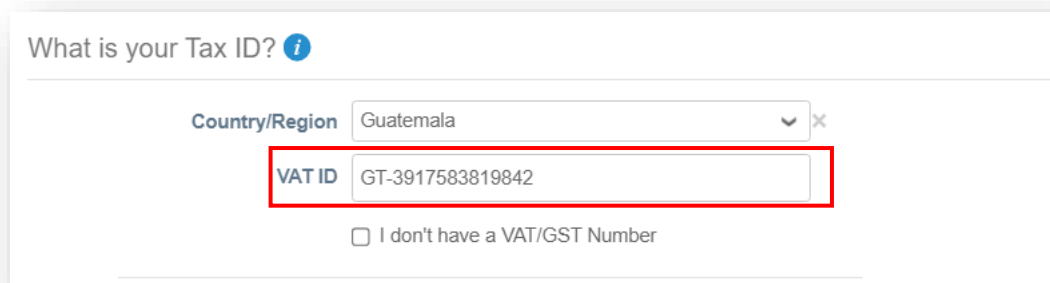
[Add additional Tax ID](#)

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., GT for Guatemala. 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



What is your Tax ID?

Country/Region

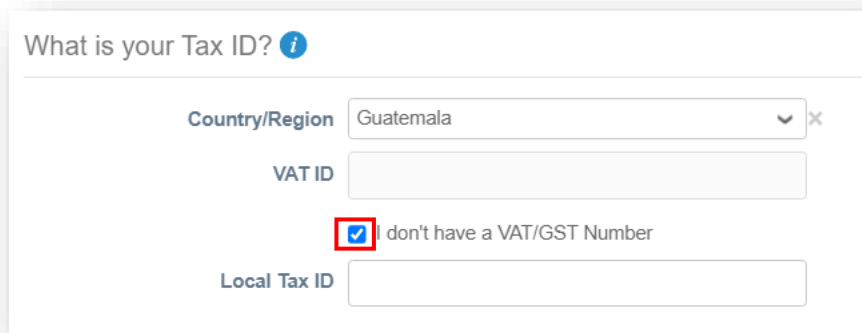
**VAT ID**

I don't have a VAT/GST Number

## Supplier Activities

### 12. 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? ⓘ

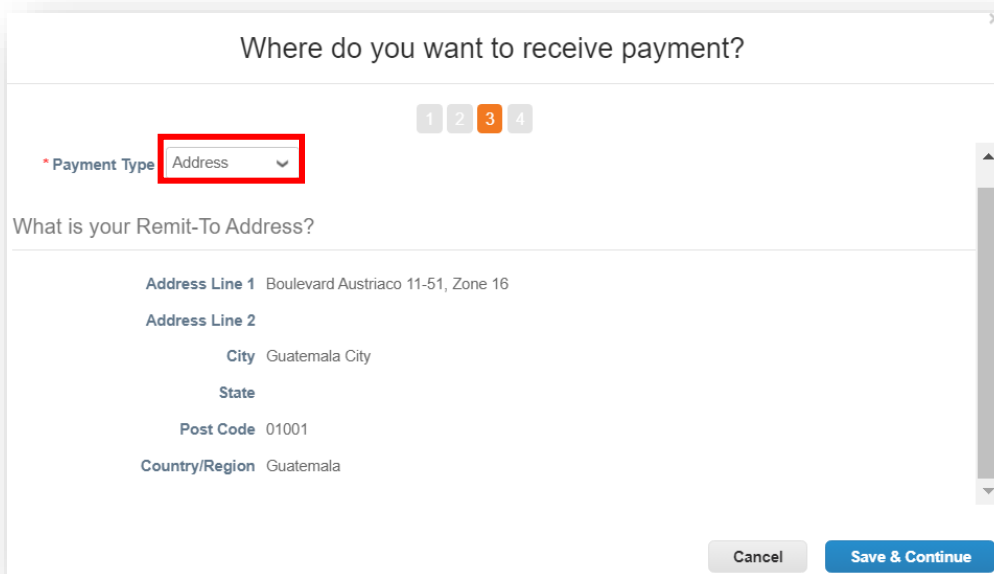
Country/Region  x

VAT ID

I don't have a VAT/GST Number

Local Tax ID

13. 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 Boulevard Austriaco 11-51, Zone 16

Address Line 2

City Guatemala City

State

Post Code 01001

Country/Region Guatemala

Cancel Save & Continue

### 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

14. 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          | <b>Boulevard Austriaco 11-51, Zone 16</b><br>Guatemala City<br>01001<br>Guatemala | Active | Manage |

Deactivate Legal Entity Cancel Next

15. 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

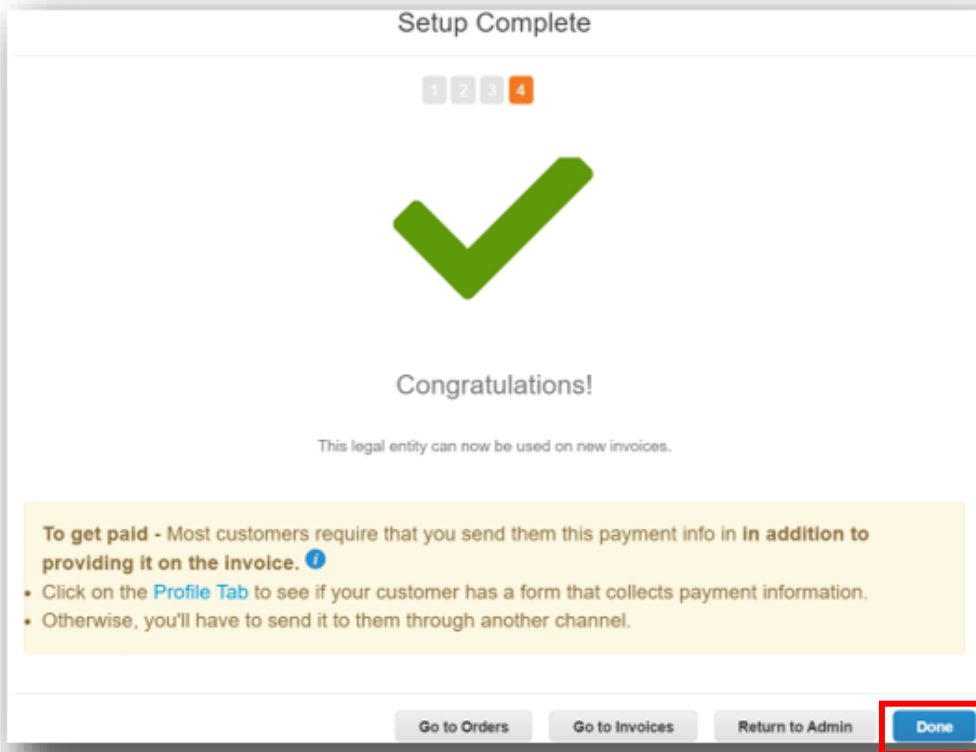
For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

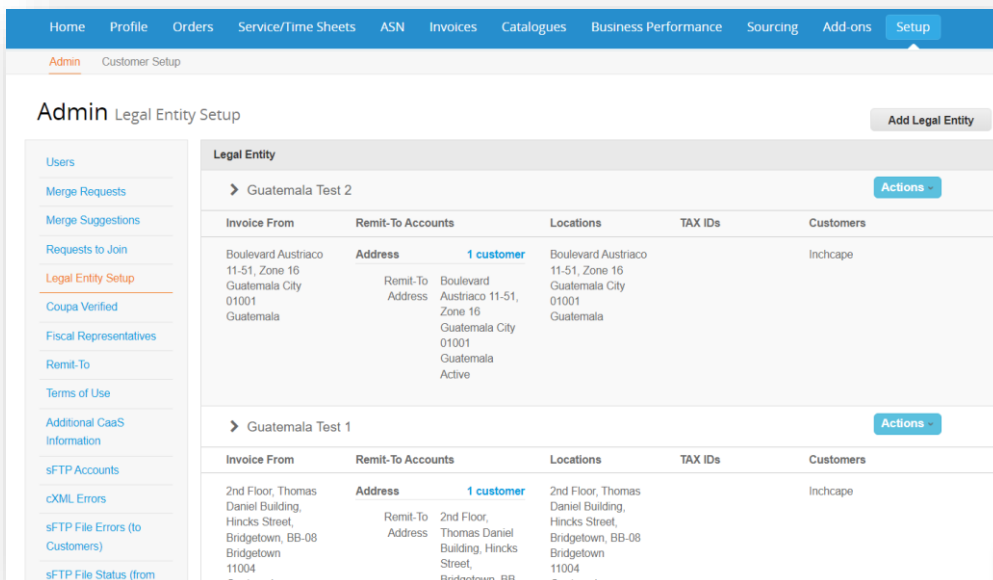
| Title   | Status |        |
|---|--------|--------|
| <b>Boulevard Austriaco 11-51, Zone 16</b><br>Guatemala City<br>01001<br>Guatemala | Active | Manage |

Deactivate Legal Entity Done

## Supplier Activities



16. **NOTE:** For setting up **multiple legal entities** on the CSP, you have to follow the **same steps** as explained above. This will result in having multiple legal entities configured in your CSP organization.



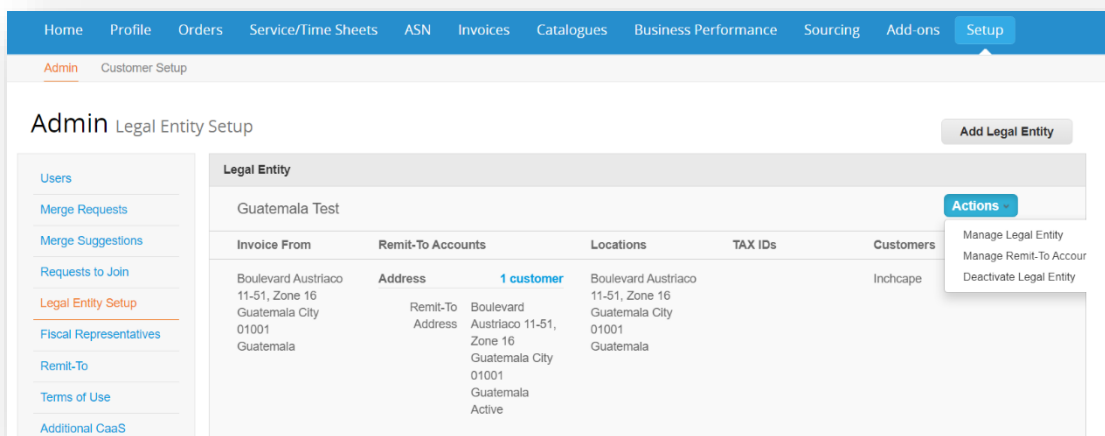
## Supplier Activities

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



The screenshot displays the 'Admin Legal Entity Setup' interface. The main content area shows a table for 'Legal Entity' with the following data:

| Invoice From  | Remit-To Accounts  | Locations   | TAX IDs | Customers |
|---|--|---|---------|-----------|
| Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala | Address<br>Remit-To Address<br>Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala<br>Active | 1 customer<br>Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala |         | Inchcape  |

An 'Actions' dropdown menu is open, showing the following options:

- Manage Legal Entity
- Manage Remit-To Account
- Deactivate Legal Entity

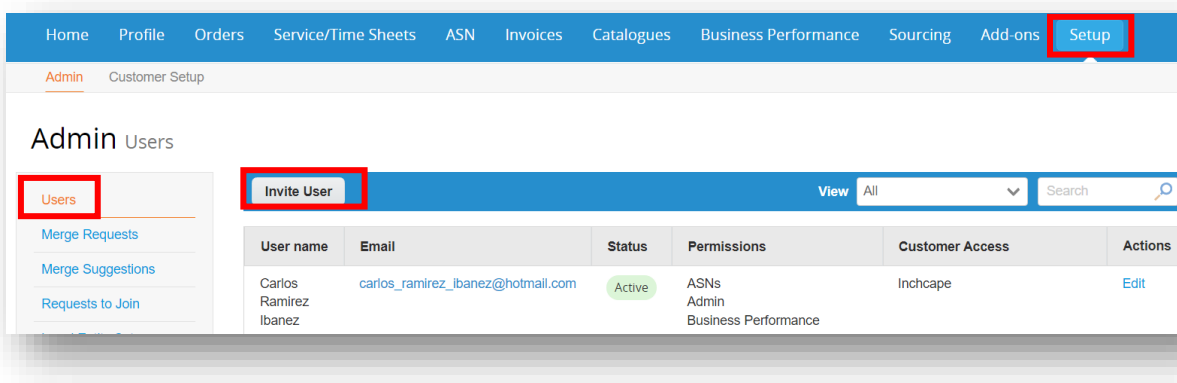


## Supplier Activities

### 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

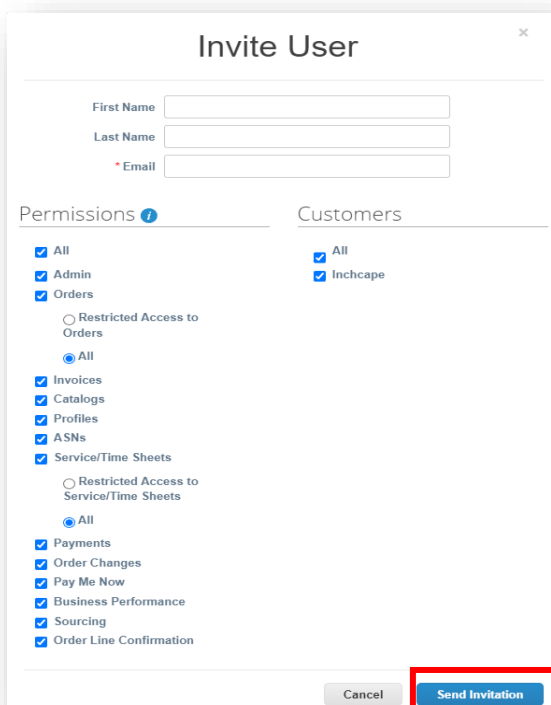


| User name             | Email                             | Status | Permissions                           | Customer Access | Actions |
|-----------------------|-----------------------------------|--------|---------------------------------------|-----------------|---------|
| Carlos Ramirez Ibanez | carlos_ramirez_ibanez@hotmail.com | Active | ASNs<br>Admin<br>Business Performance | Inchcape        | Edit    |

#### 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

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



#### Click **Send Invitation**

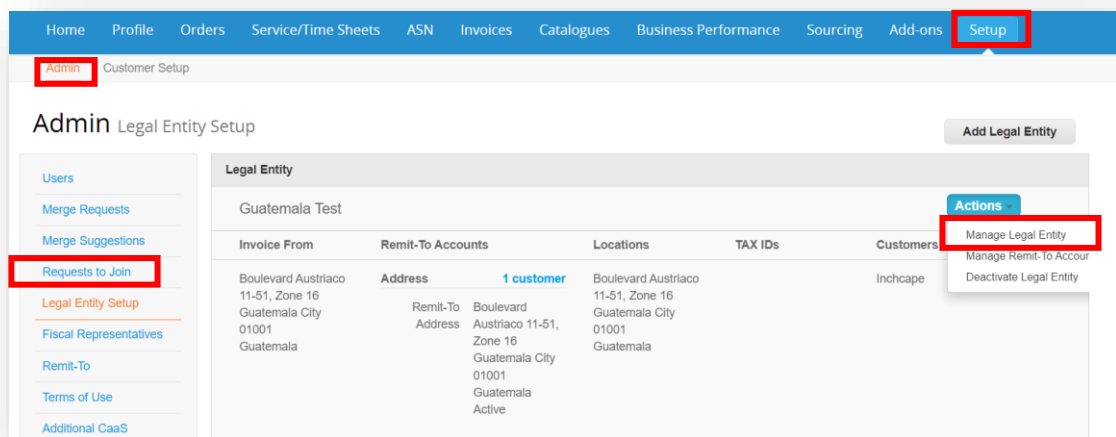
- The person you have added as a user will receive an invitation to join your company portal
- Additional users are not required to provide any company information or set up a legal entity. They are added to your company's Coupa portal which is already setup.

## Supplier Activities

### Customers Not Visible in CSP

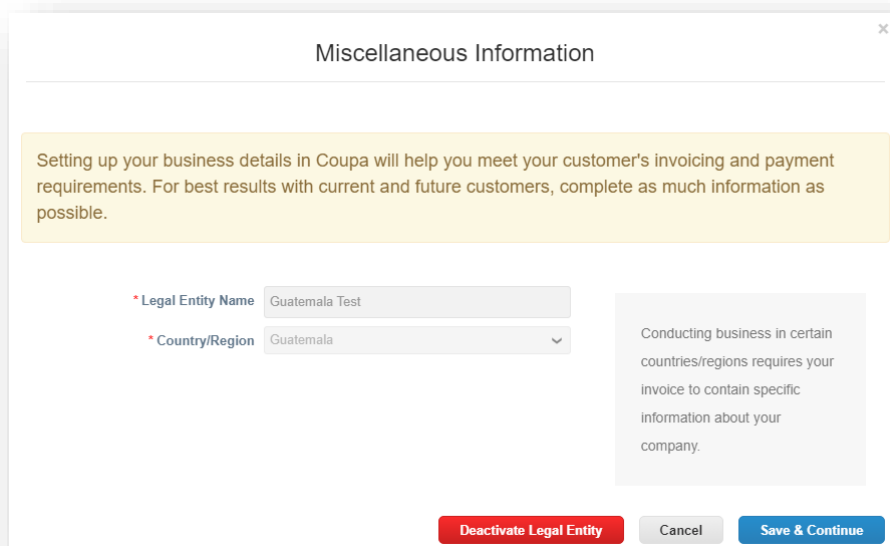
If you cannot see any customers in your portal

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



| Invoice From  | Remit-To Accounts   | Locations   | TAX IDs | Customers |
|---|---|---|---------|-----------|
| Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala | Address 1 customer<br>Remit-To Address Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala Active | Boulevard Austriaco 11-51, Zone 16 Guatemala City 01001 Guatemala |         | 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.

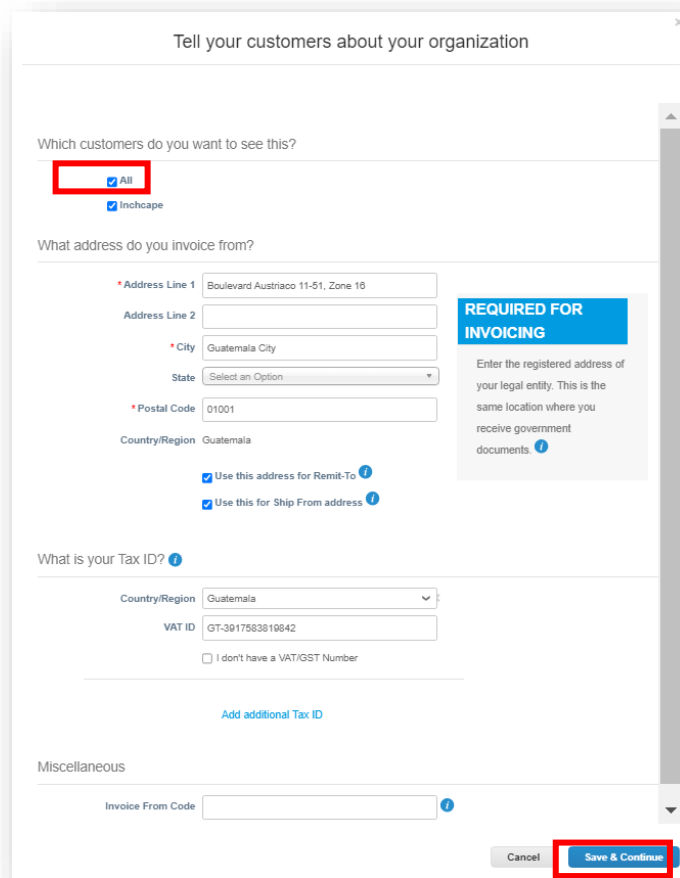
\* Legal Entity Name

\* Country/Region

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

## 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

Which customers do you want to see this?

All  
 Inchcape

What address do you invoice from?

\* Address Line 1   
Address Line 2   
\* City   
State   
\* Postal 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 where you receive government documents.

What is your Tax ID?

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

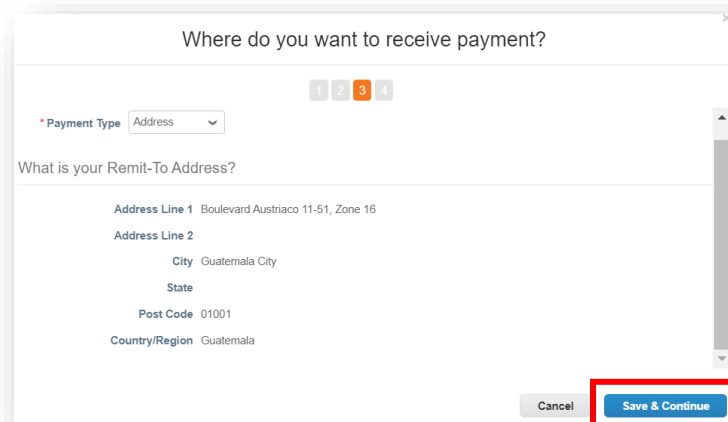
[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Cancel **Save & Continue**

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



Where do you want to receive payment?

1 2 3 4

\* Payment Type

What is your Remit-To Address?

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

Cancel **Save & Continue**

## Supplier Activities

- 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 |                        |
|--|--------|------------------------|
| Boulevard Austriaco 11-51, Zone 16<br>Guatemala City<br>01001<br>Guatemala | Active | <a href="#">Manage</a> |

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

## Supplier Activities

### Create an Invoice from Purchase Order

#### IMPORTANT NOTES:

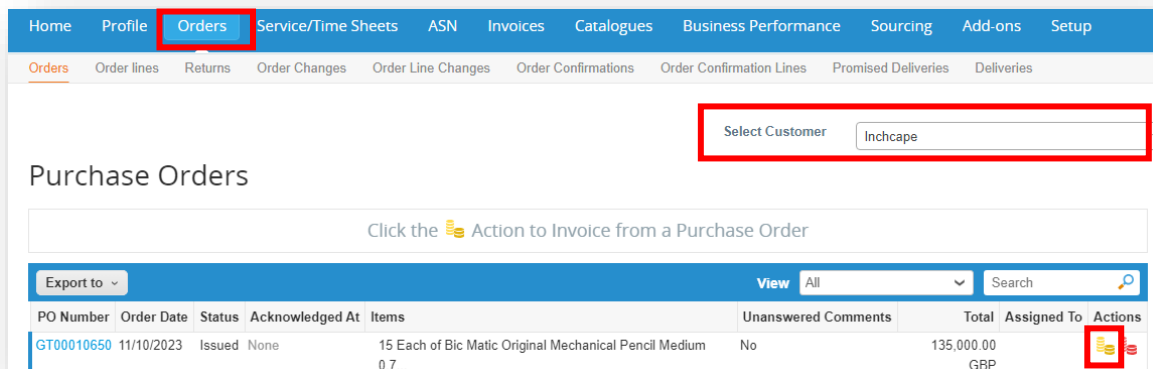
For **Chile**, only suppliers receive PO's from:

- Will.Balfour Motors SpA
- Universal Motors S. A.


Will **need** to register and use **Coupa** to create and **send Invoices** to Inchcape.

For **El Salvador**, all suppliers will be receiving **PO's** through Coupa, but won't be using the CSP to create and send Invoices to Inchcape. Besides receiving PO's, you will mainly use the CSP as a **platform** to keep your order, invoice and payment history; and also, as a tool to communicate with Inchcape.

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



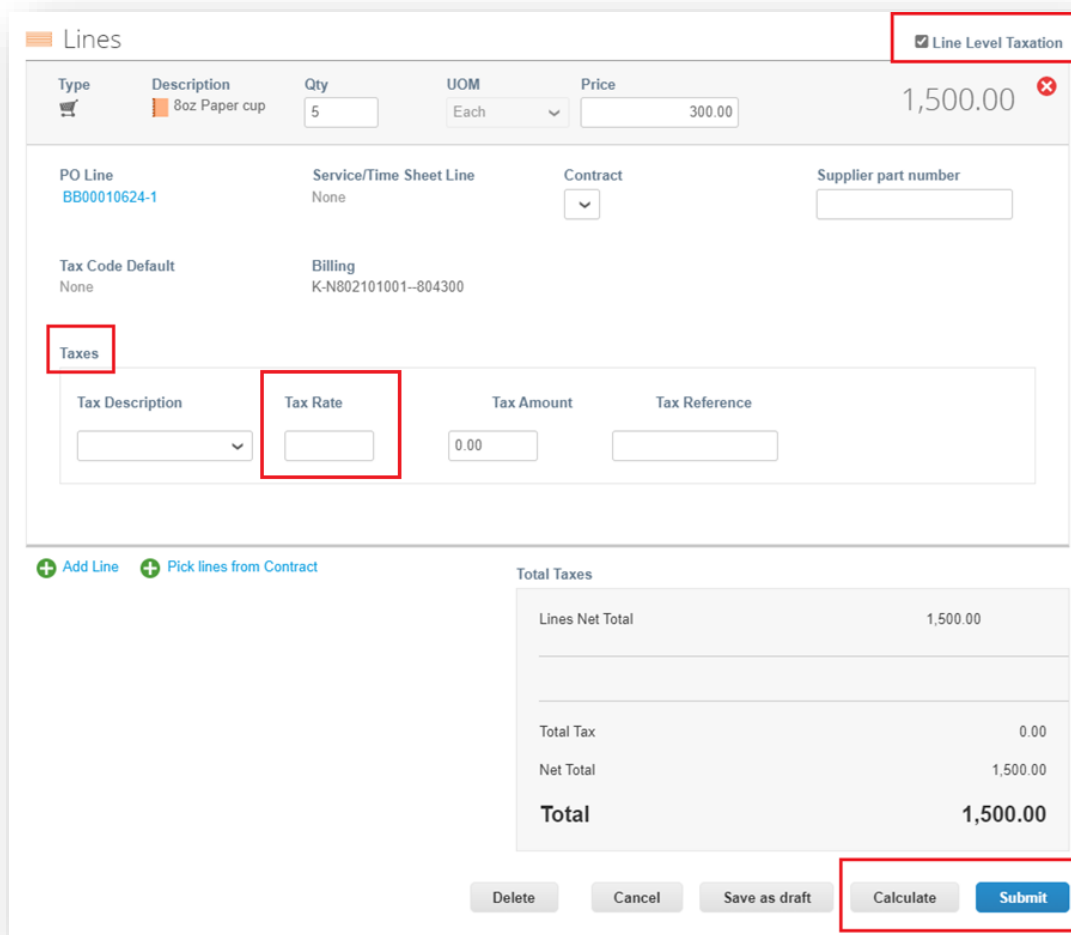
The screenshot shows the Coupa interface. The 'Orders' tab is selected in the top navigation bar. Below it, the 'Select Customer' dropdown is set to 'Inchcape'. The main content area displays 'Purchase Orders' with a table of order details. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row shows PO Number GT00010650, Order Date 11/10/2023, Status Issued, and a total of 135,000.00 GBP. The 'Actions' column for this row contains a 'Gold Coins' icon, which is highlighted with a red box.

| PO Number  | Order Date | Status | Acknowledged At | Items  | Unanswered Comments | Total             | Assigned To | Actions   |
|------------|------------|--------|-----------------|--|---------------------|-------------------|-------------|---|
| GT00010650 | 11/10/2023 | Issued | None            | 15 Each of Bic Mattic Original Mechanical Pencil Medium 0.7... | No                  | 135,000.00<br>GBP |             |  |

**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

4. Complete the relevant fields.
5. Click on the **Line Level Taxation** checkbox.
6. Manually complete the **Tax Rate** on the corresponding field. Do **not** enter or modify any other field under **"Taxes" section**, or else the Portal won't allow for the Invoice to be submitted.
7. Click **Calculate** to work out the VAT element of the invoice
8. Click **Submit**



**Lines**  Line Level Taxation

| Type | Description   | Qty | UOM  | Price  |          |
|------|---------------|-----|------|--------|----------|
|      | 8oz Paper cup | 5   | Each | 300.00 | 1,500.00 |

PO Line: BB00010624-1  
Service/Time Sheet Line: None  
Contract:   
Supplier part number:

Tax Code Default: None  
Billing: K-N802101001-804300

**Taxes**

| Tax Description      | Tax Rate             | Tax Amount | Tax Reference        |
|----------------------|----------------------|------------|----------------------|
| <input type="text"/> | <input type="text"/> | 0.00       | <input type="text"/> |

+ Add Line + Pick lines from Contract

**Total Taxes**

|                 |                 |
|-----------------|-----------------|
| Lines Net Total | 1,500.00        |
| Total Tax       | 0.00            |
| Net Total       | 1,500.00        |
| <b>Total</b>    | <b>1,500.00</b> |

Delete Cancel Save as draft Calculate **Submit**

## Supplier Activities

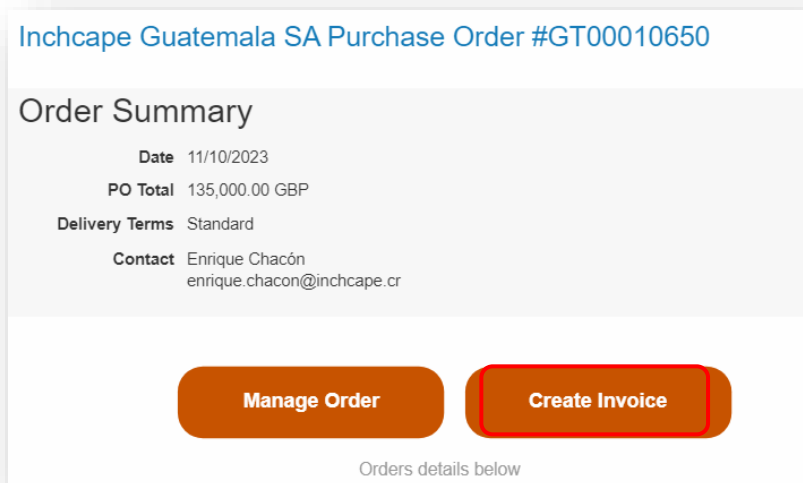
### Invoicing using SAN (Supplier Actionable Notifications)

#### What is SAN?

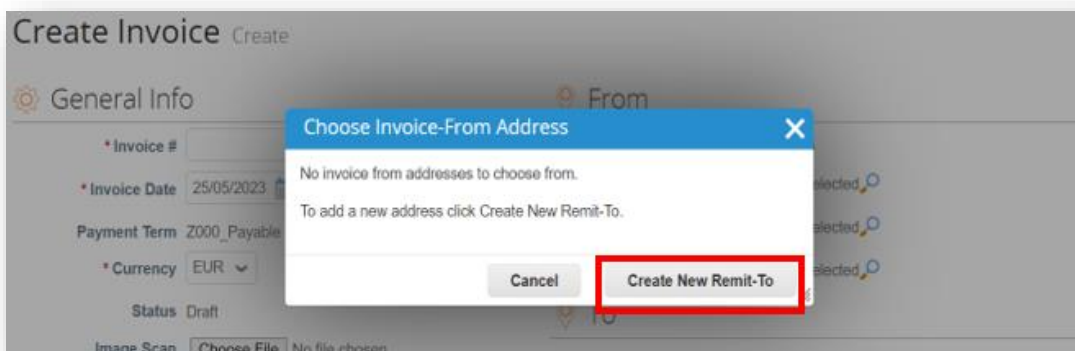
Supplier Actionable Notification (SAN) is one of the e-Invoicing channels that can push Invoices from the suppliers directly into Coupa. Supplier Actionable Notifications (SAN) allows you to act on POs directly from email notifications for POs created in Coupa, giving the option to **create an invoice**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

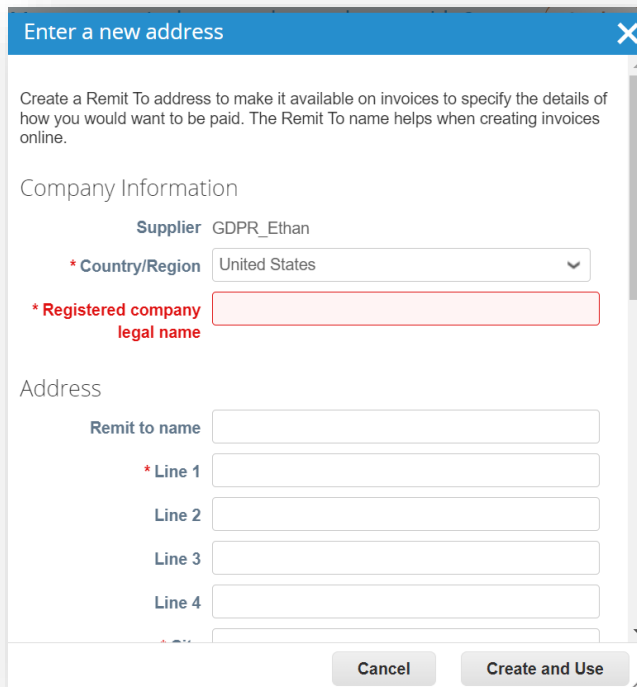


3. Before you can create an Invoice, you must create a new **Remit-to** address



## 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: [Redacted]

**Address**

Remit to name: [Empty]

\* Line 1: [Empty]

Line 2: [Empty]

Line 3: [Empty]

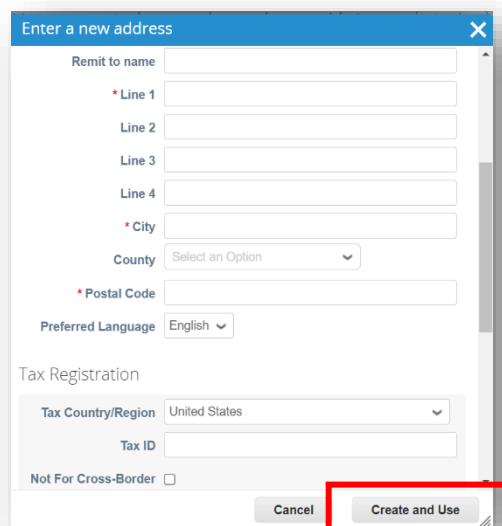
Line 4: [Empty]

[Cancel] [Create and Use]

#### NOTES

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

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



**Enter a new address** [X]

Remit to name: [Empty]

\* Line 1: [Empty]

Line 2: [Empty]

Line 3: [Empty]

Line 4: [Empty]

\* City: [Empty]

County: Select an Option

\* Postal Code: [Empty]

Preferred Language: English

**Tax Registration**

Tax Country/Region: United States

Tax ID: [Empty]

Not For Cross-Border:

[Cancel] [Create and Use]

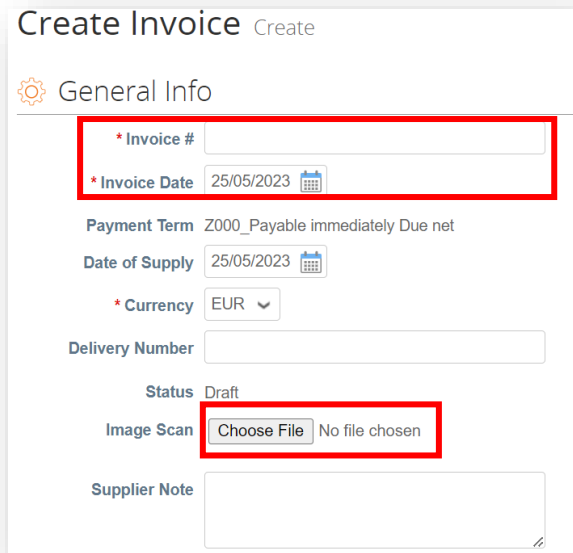
#### NOTES

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

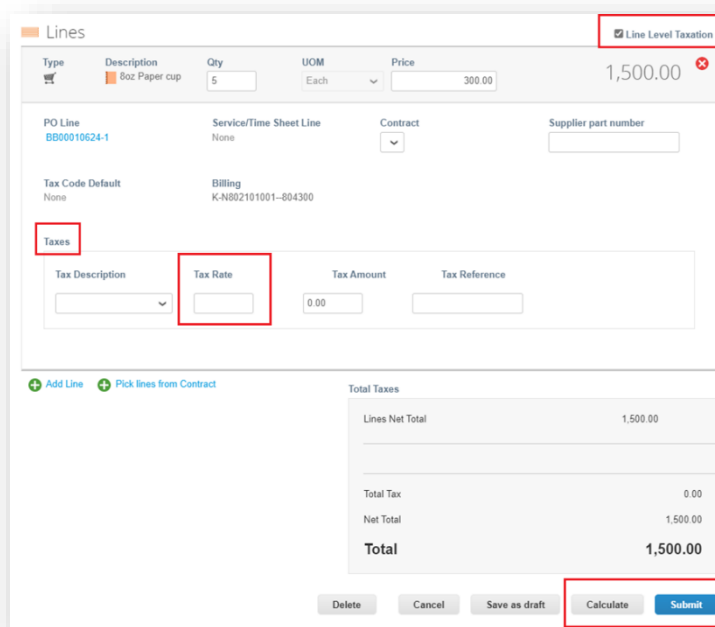
Image Scan  No file chosen

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.
8. Click on the **Line Level Taxation** checkbox.
9. Manually complete the **Tax Rate** on the corresponding field. Do not enter or modify any other field under **"Taxes"** section, or else the Portal **won't allow** for the Invoice to be submitted.



Lines  Line Level Taxation

| Type | Description   | Qty | UOM  | Price  |          |
|------|---------------|-----|------|--------|----------|
|      | Boz Paper cup | 5   | Each | 300.00 | 1,500.00 |

PO Line BB00010624-1 Service/Time Sheet Line None Contract Supplier part number

Tax Code Default None Billing K-N802101001-804300

| Tax Description | Tax Rate | Tax Amount | Tax Reference |
|-----------------|----------|------------|---------------|
|                 |          | 0.00       |               |

+ Add Line + Pick lines from Contract

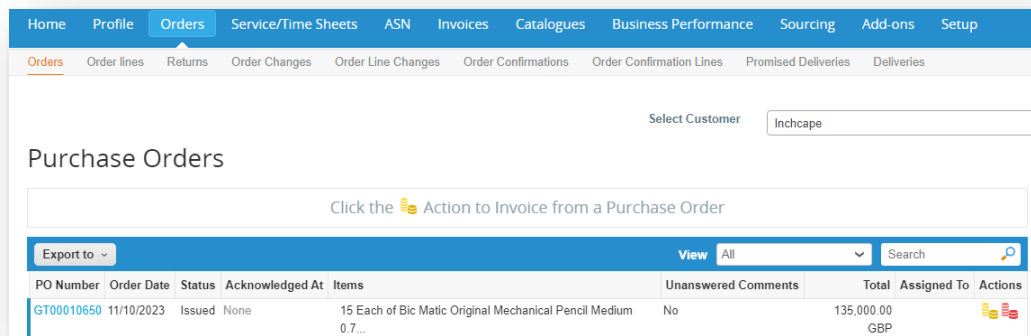
| Total Taxes     |                 |
|-----------------|-----------------|
| Lines Net Total | 1,500.00        |
| Total Tax       | 0.00            |
| Net Total       | 1,500.00        |
| <b>Total</b>    | <b>1,500.00</b> |

Delete Cancel Save as draft Calculate Submit

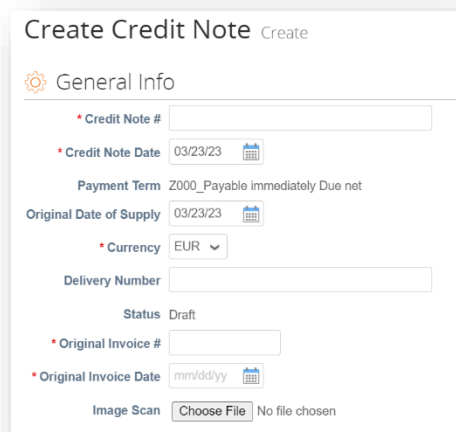
## Supplier Activities

### Raise Credit Note - Option 1

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



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

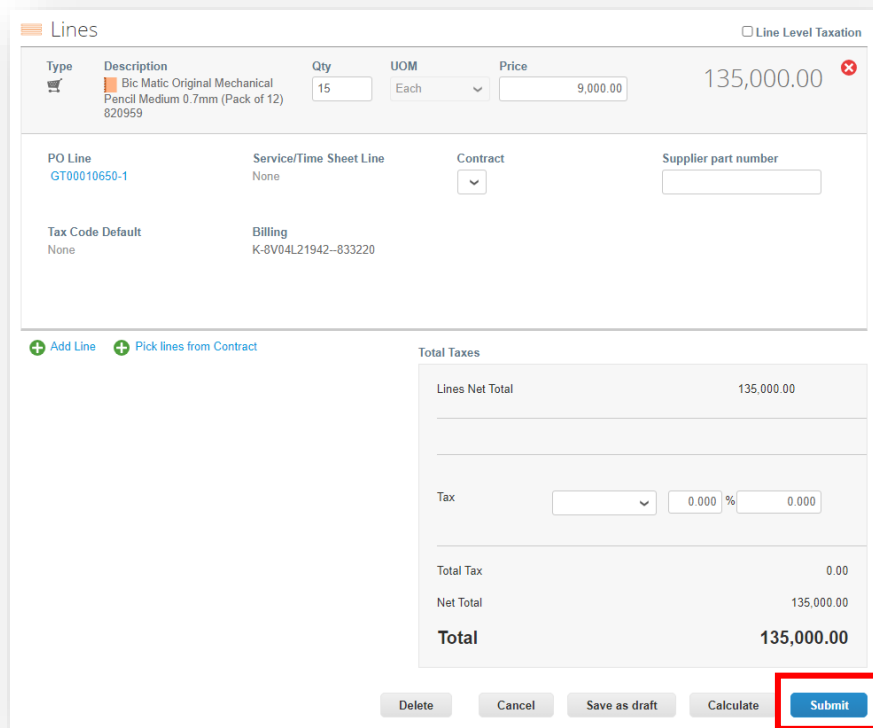


The screenshot shows the 'Create Credit Note' form with the following fields and values:



- Credit Note #**: (Mandatory field, empty)
- Credit Note Date**: 03/23/23
- Payment Term**: Z000\_Payable immediately Due net
- Original Date of Supply**: 03/23/23
- Currency**: EUR
- Delivery Number**: (Empty)
- Status**: Draft
- Original Invoice #**: (Mandatory field, empty)
- Original Invoice Date**: mm/dd/yy
- Image Scan**: Choose File (No file chosen)

## Supplier Activities

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



**Lines** ☐ Line Level Taxation

| Type  | Description   | Qty | UOM  | Price    |   |
|---|---|-----|------|----------|---|
|  |  Bic Matic Original Mechanical Pencil Medium 0.7mm (Pack of 12) 820959 | 15  | Each | 9,000.00 | 135,000.00 <span style="color: red;">✖</span> |

| PO Line      | Service/Time Sheet Line | Contract             | Supplier part number |
|--------------|-------------------------|----------------------|----------------------|
| GT00010650-1 | None                    | <input type="text"/> | <input type="text"/> |

| Tax Code Default | Billing              |
|------------------|----------------------|
| None             | K-8V04L21942--833220 |

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

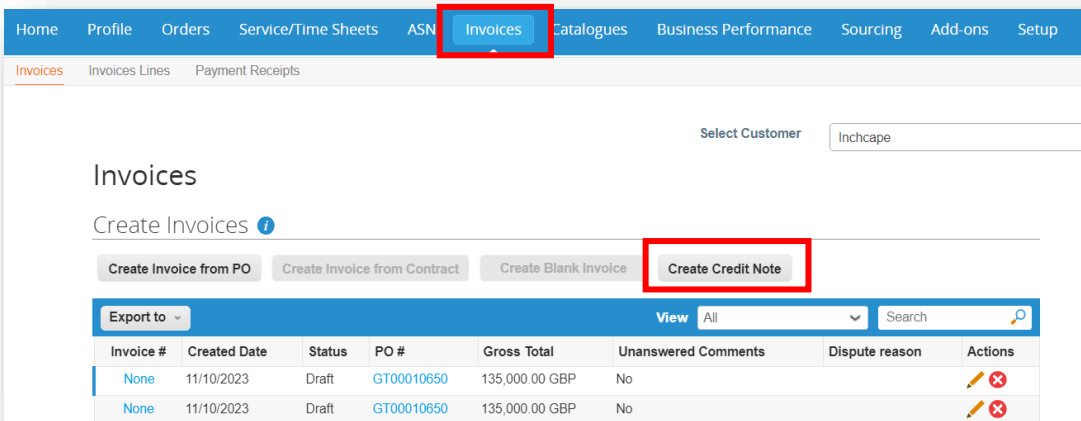
**Total Taxes**





|                 |   |
|-----------------|---|
| Lines Net Total | 135,000.00  |
| Tax             | <input type="text"/> 0.000 % <input type="text"/> 0.000 |
| Total Tax       | 0.00  |
| Net Total       | 135,000.00  |
| <b>Total</b>    | <b>135,000.00</b>                                       |

## Supplier Activities

### Raise Credit Note - Option 2

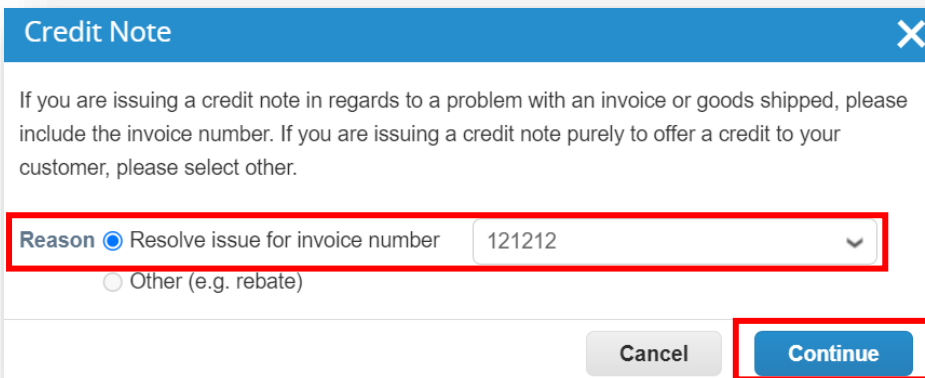
1. Go to **Invoices** tab and click **Create Credit Note**



| Invoice # | Created Date | Status | PO #       | Gross Total    | Unanswered Comments | Dispute reason | Actions   |
|-----------|--------------|--------|------------|----------------|---------------------|----------------|---|
| None      | 11/10/2023   | Draft  | GT00010650 | 135,000.00 GBP | No                  |                |   |
| None      | 11/10/2023   | Draft  | GT00010650 | 135,000.00 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** [X]

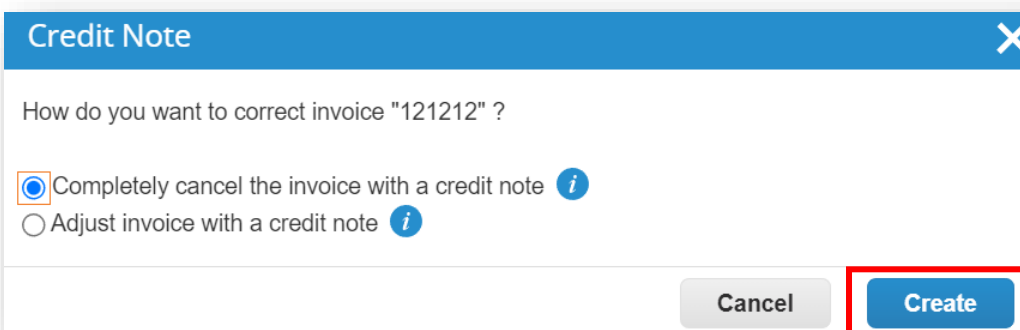
If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

**Reason**  Resolve issue for invoice number 121212 

Other (e.g. rebate)


**Cancel** **Continue**


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



**Credit Note** [X]

How do you want to correct invoice "121212" ?

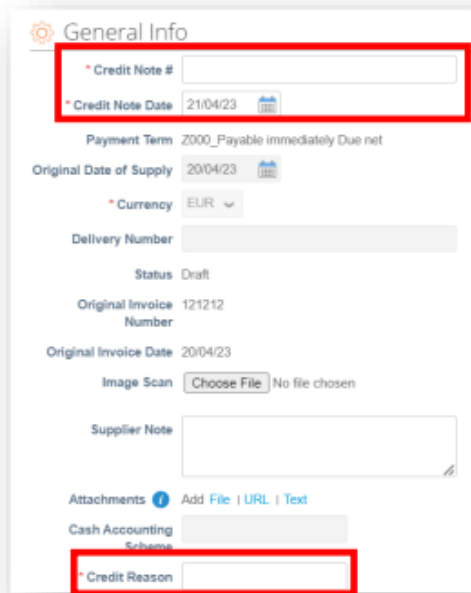
Completely cancel the invoice with a credit note 

Adjust invoice with a credit note 

**Cancel** **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 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

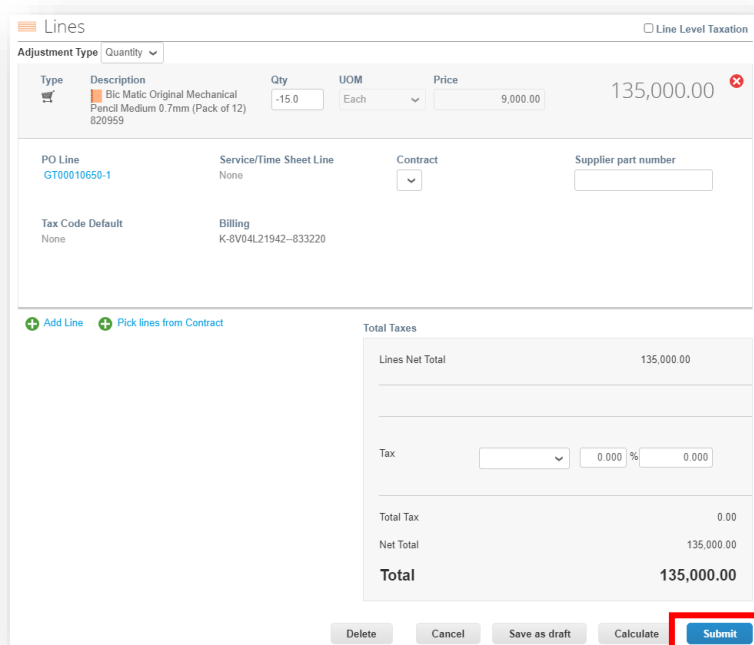
Attachments

Cash Accounting Scheme

\* Credit Reason

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

### 5. Click **Submit**



**Lines**  Line Level Taxation

Adjustment Type  Quantity

| Type                     | Description   | Qty   | UOM  | Price    |   |
|--------------------------|---|-------|------|----------|---|
| <input type="checkbox"/> | Bic Matic Original Mechanical Pencil Medium 0.7mm (Pack of 12) 820959 | -15.0 | Each | 9,000.00 | 135,000.00 <input type="button" value="x"/> |

PO Line GT00010650-1 Service/Time Sheet Line None Contract  Supplier part number

Tax Code Default None Billing K-8V04L21942-833220

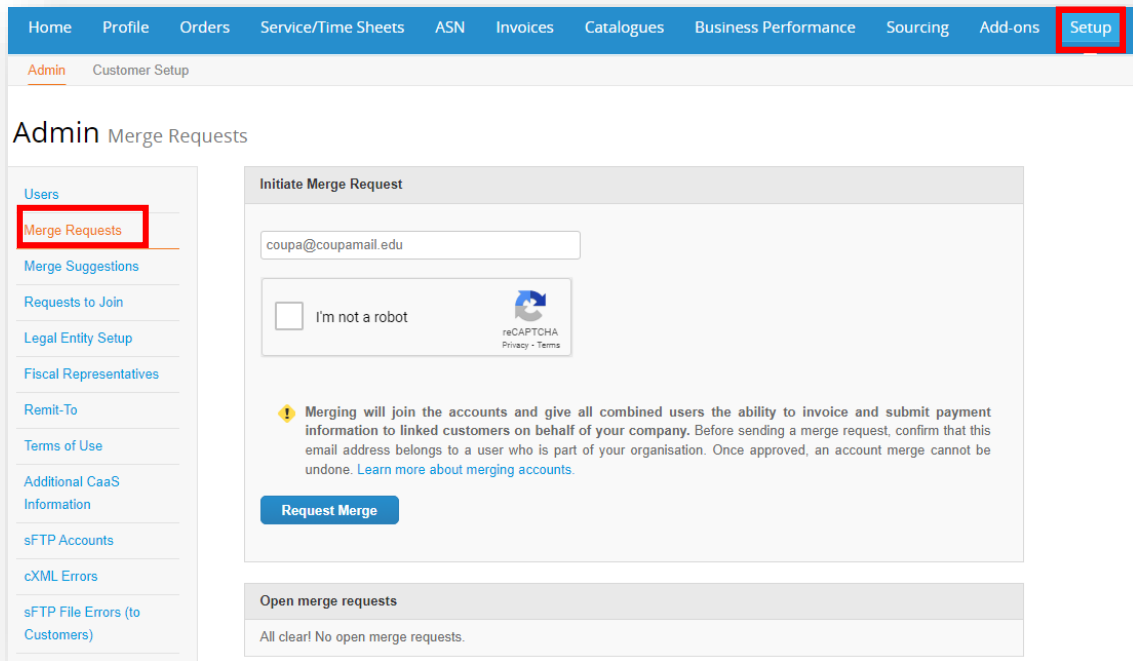
Total Taxes

|                 |   |
|-----------------|---|
| Lines Net Total | 135,000.00  |
| Tax             | <input type="text"/> 0.000 % <input type="text"/> 0.000 |
| Total Tax       | 0.00  |
| Net Total       | 135,000.00  |
| <b>Total</b>    | <b>135,000.00</b>                                       |

## Supplier Activities

### MERGE TWO ACCOUNTS

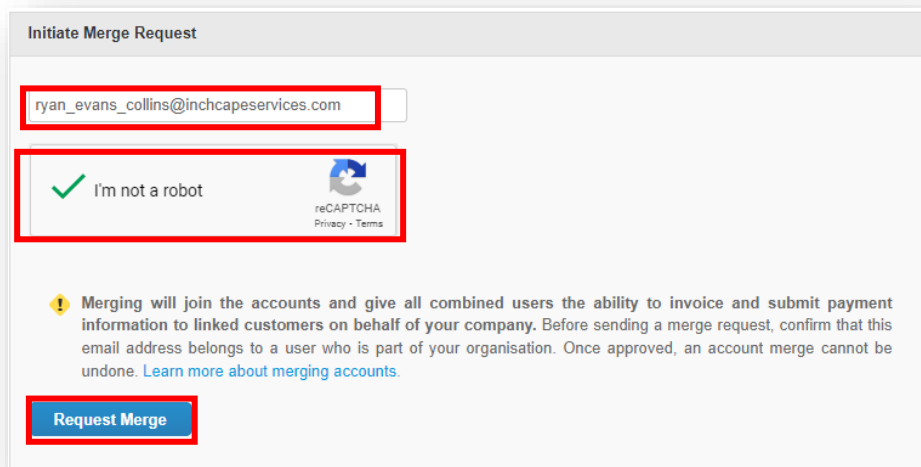
1. Go to **Setup** tab, under **Admin**, select **Merge Requests**



The screenshot shows the COUPA Admin interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup (highlighted with a red box). Below the navigation bar, the 'Admin' section is active, and 'Merge Requests' is selected in the left sidebar (also highlighted with a red box). The main content area is titled 'Initiate Merge Request' and contains a form with the following elements:

- An email input field containing 'coupa@coupamail.edu'.
- A reCAPTCHA 'I'm not a robot' test with a checkbox and a 'reCAPTCHA Privacy - Terms' link.
- A warning icon and text: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)'
- A blue 'Request Merge' button.
- A section titled 'Open merge requests' with the text 'All clear! No open merge requests.'

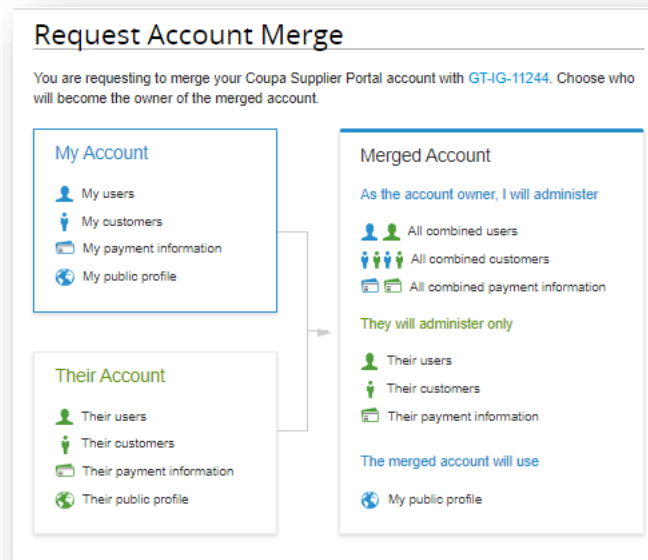
2. Provide the email ID you would like to merge your account with under the **Email** field.
3. Make sure you go through the ReCaptcha "I'm not a robot" test
4. Select **Request Merge**



This close-up screenshot of the 'Initiate Merge Request' form highlights three key elements with red boxes:

- The email input field containing 'ryan\_evans\_collins@inchcapeservices.com'.
- The reCAPTCHA 'I'm not a robot' test, which is now completed, indicated by a green checkmark.
- The blue 'Request Merge' button.

## Supplier Activities

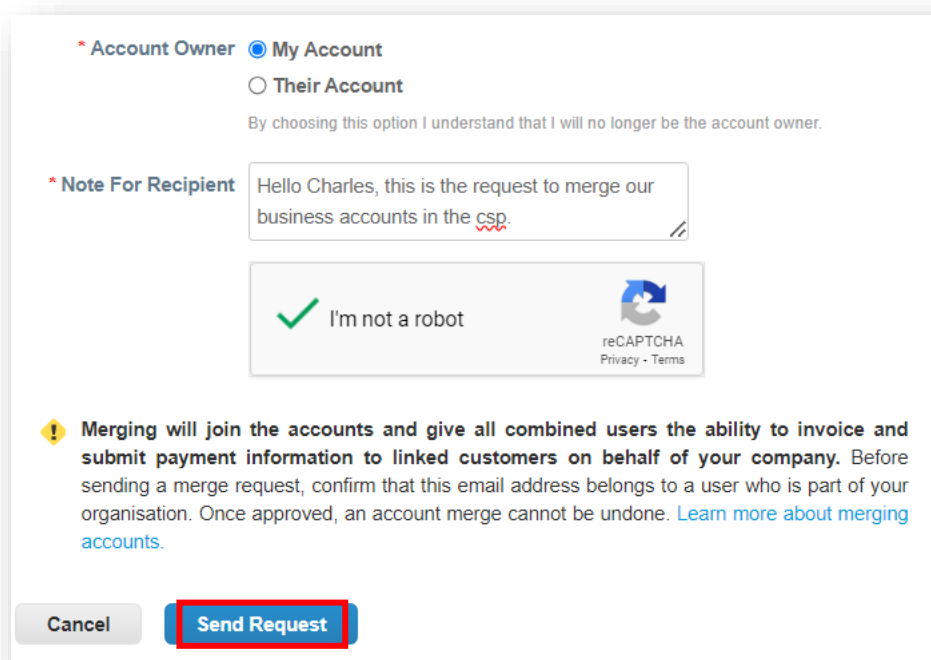


**Request Account Merge**

You are requesting to merge your Coupa Supplier Portal account with **GT-IG-11244**. Choose who will become the owner of the merged account.

| My Account   | Their Account  | Merged Account  |
|--|--|---|
| <ul style="list-style-type: none"><li>My users</li><li>My customers</li><li>My payment information</li><li>My public profile</li></ul> | <ul style="list-style-type: none"><li>Their users</li><li>Their customers</li><li>Their payment information</li><li>Their public profile</li></ul> | <p>As the account owner, I will administer</p> <ul style="list-style-type: none"><li>All combined users</li><li>All combined customers</li><li>All combined payment information</li></ul> <p>They will administer only</p> <ul style="list-style-type: none"><li>Their users</li><li>Their customers</li><li>Their payment information</li></ul> <p>The merged account will use</p> <ul style="list-style-type: none"><li>My public profile</li></ul> |


5. You can select the account owner as **your account** or **their account**
6. You can add a **note for recipient** to explain the merging request.
7. Make sure you go through ReCaptcha "I'm not a robot" test
8. Select **Send Request**.



\* **Account Owner**  **My Account**  
 **Their Account**

By choosing this option I understand that I will no longer be the account owner.

\* **Note For Recipient** Hello Charles, this is the request to merge our business accounts in the csp.

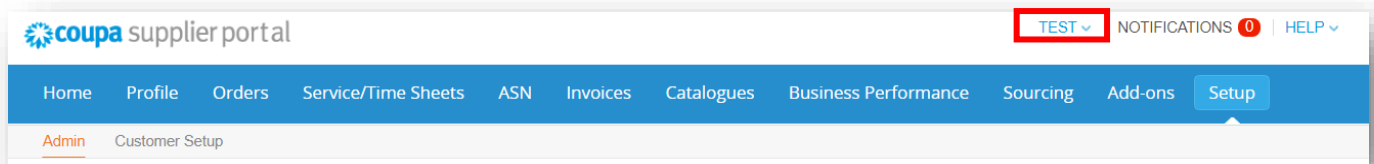
I'm not a robot   
reCAPTCHA  
Privacy - Terms

**!** Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

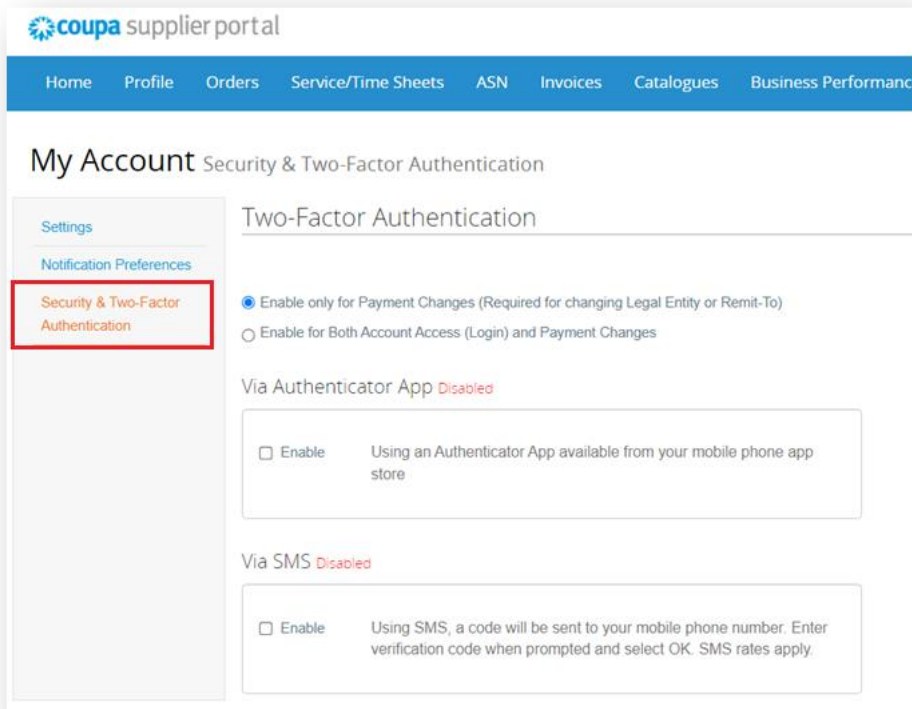
## Supplier Activities

### ENABLE TWO FACTOR AUTHENTICATOR

1. Under your **username** at the top right bar, select **Account Settings** on the dropdown



2. Select **Security & Multi Factor Authentication**





## Supplier Activities

3. You can select to **Enable only for Payment Changes (Required for changing Legal Entity or Remit-to)** or **Enable for Both Account Access (Login) and Payment Changes**.
4. There are two options in which you can enable two factor authenticator in your account. It can be **Via Authenticator App** or **Via SMS**.
5. You should select on the **Enable** checkbox the preferred option for the two factor authentication.

Via Authenticator App Disabled

Enable      Using an Authenticator App available from your mobile phone app store

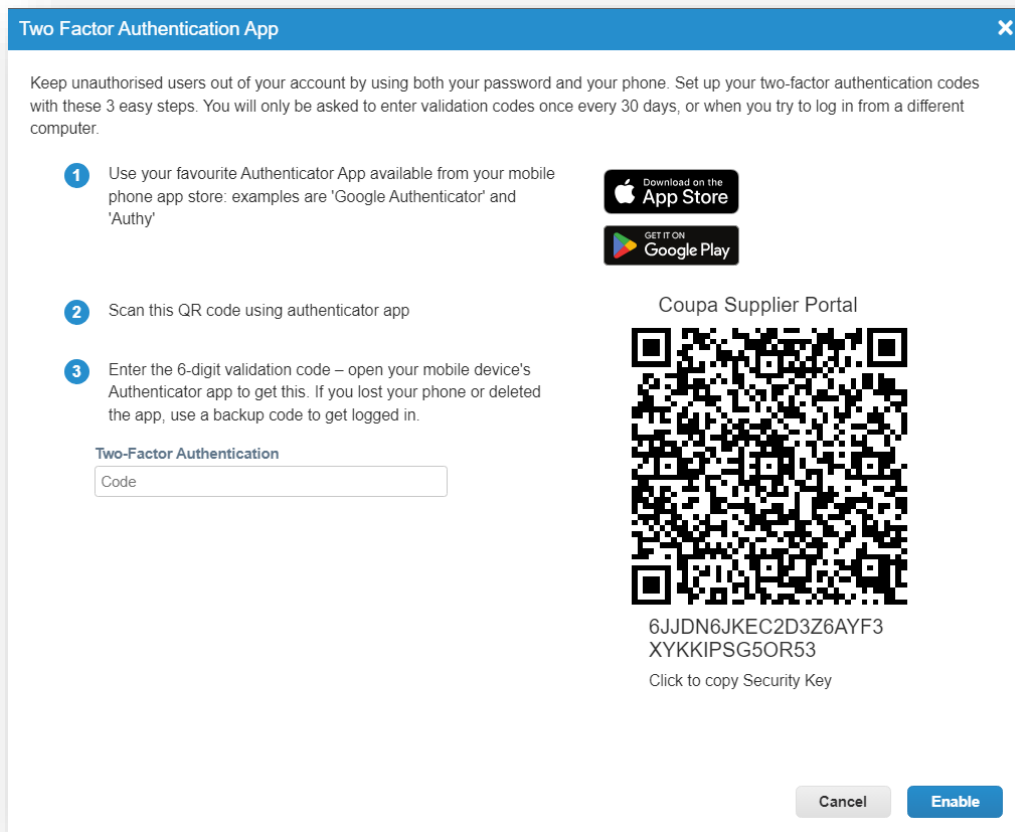
Via SMS Disabled

Enable      Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.

## Supplier Activities

### VIA AUTHENTICATOR APP

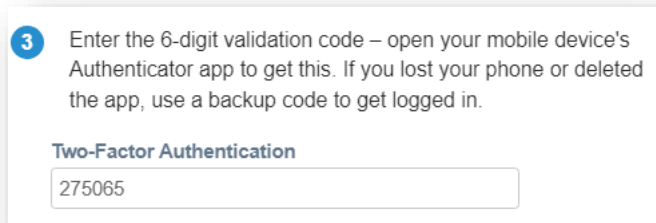
1. If you would like to enable your two factor authentication via **Authenticator App**, once you select on the **Enable** checkbox, you will get a pop-up with a **3-step process** you can follow to proceed with this authentication.
2. As you can see on the pop-up,



- i. Download the Authenticator App, here you will have a **direct link** to download it both through the App Store and Google Play.
- ii. **Scan the QR** shown in the pop-up to enable the authentication
- iii. **Enter the verification code** that appears in your app to finish the authentication

## Supplier Activities

- Once you provide your code shown in the **Authenticator app**, you can click on **Enable**.



3 Enter the 6-digit validation code – open your mobile device's Authenticator app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

**Two-Factor Authentication**

- The authentication Via Authenticator App would be enabled and you will get **backup codes** in case you lose your authentication access.



**Save Your Backup Codes** X

These codes were generated on October 11, 2023

Emergency recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

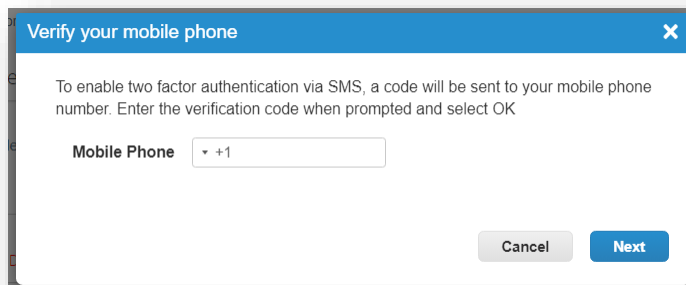
|        |        |
|--------|--------|
| U_oQkQ | jxPkew |
| 6l2oaA | O6y3fQ |
| _19hbQ | d27kPg |

Copy Download Print

## Supplier Activities

### VIA SMS

1. If you would like to enable your two factor authentication via **SMS**, once you select on the **Enable** checkbox, you will get a pop-up where you will have to provide your **phone number** to receive an SMS.



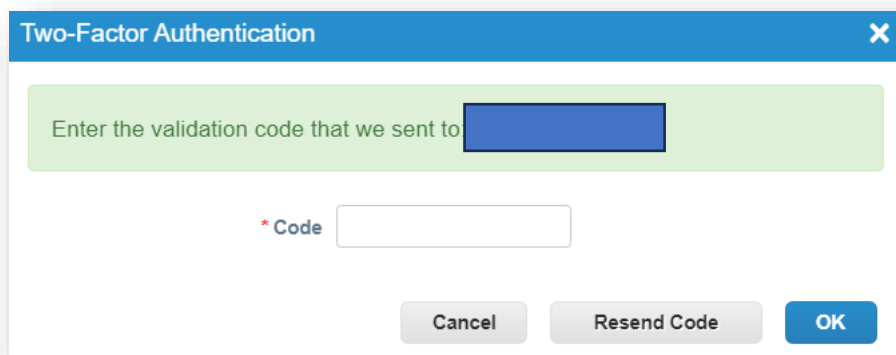
Verify your mobile phone

To enable two factor authentication via SMS, a code will be sent to your mobile phone number. Enter the verification code when prompted and select OK

Mobile Phone

Cancel Next

2. Once you provide your phone number, you can click on **Next** and you will have to **provide this code** sent via SMS

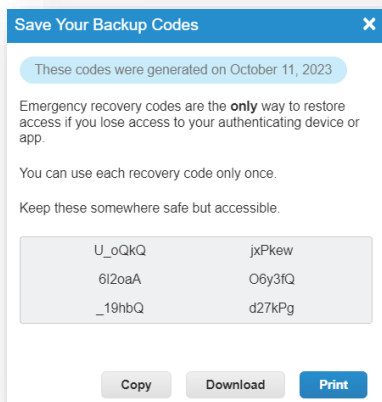


Two-Factor Authentication

Enter the validation code that we sent to

\* Code

Cancel Resend Code OK



Save Your Backup Codes

These codes were generated on October 11, 2023

Emergency recovery codes are the **only** way to restore access if you lose access to your authenticating device or app.

You can use each recovery code only once.

Keep these somewhere safe but accessible.

|        |        |
|--------|--------|
| U_oQkQ | jxPkew |
| 6l2oaA | O6y3fQ |
| _19hbQ | d27kPg |

Copy Download Print

3. Once you provide the code and click on **Ok**, the two factor authenticator via SMS would be **enabled**, and also, you will be provided **backup codes** in case you lose access to your authentication. You can **copy, download or print** this information.

## Supplier Activities

### Appendix

Refer the table below to check the country code for all the countries:

| S. No. | Country     | Country Code |
|--------|-------------|--------------|
| 1.     | Barbados    | BB           |
| 2.     | Argentina   | AR           |
| 3.     | Chile       | CL           |
| 4.     | Guatemala   | GT           |
| 5.     | Peru        | PE           |
| 6.     | Ecuador     | EC           |
| 7.     | El Salvador | SV           |
| 8.     | Costa Rica  | CR           |
| 9.     | Panama      | PA           |
| 10.    | Uruguay     | UY           |