

# COUPA TRAINING

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## Coupa Supplier Portal (CSP) – How to Legal Entity Setup

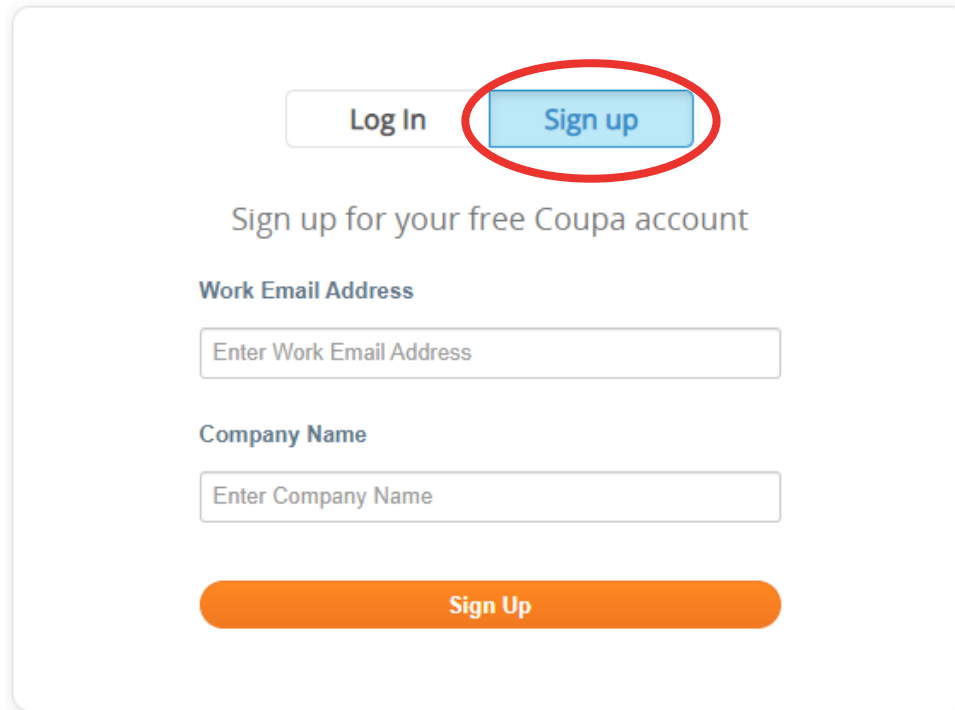
January 2022

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# JOINING COUPA

To join Coupa use the following Link <https://supplier.coupa.com/sessions/new> select the Sign up tab and insert your email address and Registered Company name.



Log In Sign up

Sign up for your free Coupa account

**Work Email Address**

Enter Work Email Address

**Company Name**

Enter Company Name

Sign Up

Once you have clicked on Sign up you will receive the below message on your screen

An invitation has been sent to joar [REDACTED]@gmail.com. Please check your email and follow the instructions to complete the process. X

You will then receive an email from Coupa

☆ Coupa Supplier Port. 2 Action Required – Click Below to Complete Coupa Registration - Action Required – Click Below to Complete Coupa Registration Thank you for initiating the registration process with Coup...

Action Required – Click Below to Complete Coupa Registration Inbox x

Coupa Supplier Portal <do\_not\_reply@supplier-test.coupa-host.com>  
to

Action Required – Click Below to Complete Coupa Registration

Thank you for initiating the registration process with Coupa. To complete this request, click on the Confirm Email button below.

Note that most actions in Coupa require that you be linked to a Coupa buying organisation. However, until then you can still keep your profile up-to-date and help buying organisations find and connect with you, as well as set up your account security and early payment preferences through the Admin tab.

Once linked to customers, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions and much more. Contact your customer to request them to link to your account.

If you are participating in a Public Event, you will receive an email invitation once the buyer has accepted your request.

Coupa's Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below. Welcome!

[Confirm Email](#)

[Overview](#)

Learn more about the Coupa Supplier Portal

[Need help?](#)

Answers to common questions and issues

[Coupa Info](#)

Learn more about how companies use Coupa



Business Spend Management

Click the confirm Email button – This will direct you to the Coupa Portal.

## Join the Coupa Supplier Portal

jo7

@gmail.com | Motors Ltd

Your name

Enter first name

Enter last name

Company

Motors Ltd

Create a Password

Use at least 8 characters and include a number and a letter.

Create Password

Confirm Password

I accept the [Privacy Policy](#) and the [Terms of Use](#).

[Activate Coupa Account](#)

Enter your First Name and Last Name. Your Registered company name will be visible you can amend this if required.

Create a password for your account and tick to accept the Privacy Policy and Terms of Use.

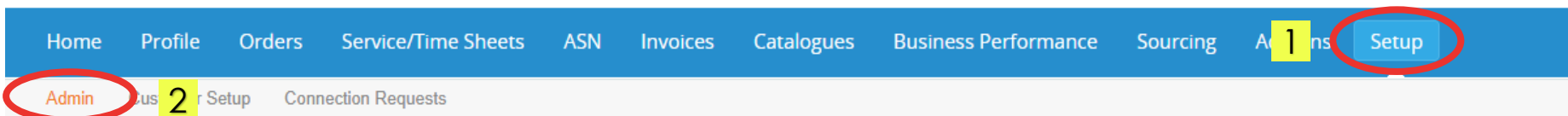
You can then click the Activate Coupa Account Button.

# SETTING UP YOUR LEGAL ENTITY

The next step is to setup your legal entity

1. Go to the Setup tab
2. Choose The Admin section
3. Choose Legal Entity setup
4. Click Add Legal entity

**Please note**, all data used in the Legal Entity pages will pull through to the legal invoice Coupa creates so it must be accurate.



## Admin Legal Entity Setup



### Legal Entity

Let's get your company set up for electronic invoicing!  
We'll walk you through what's needed and keep it as short as possible.

The first thing you'll need to do is add a legal entity.

Please note, if you are a European Company, or you have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-invoicing Setup to continue.

# SETTING UP LEGAL ENTITY

Add your Legal Entity name and choose your Country

Where's your business located? ✕

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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

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

Cancel Continue

## Miscellaneous Information ✕

1 2 3 4

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country

\* Type of Company

Board of Directors

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

Cancel Save & Continue

Add your type of company. E.g. Accounting, Consulting, Parts Supplier etc.

You don't need to add Board of Directors so you can skip this part.

# SETTING UP LEGAL ENTITY

## Tell your customers about your organization

1 2 3 4

1. Make sure "**ALL**" is ticked so you can view all of the Inchcape entities
2. Insert your registered Office Address
3. Make sure both boxes are ticked – This will save you from having to enter your address multiple times.

Which customers do you want to see this?

- 1  All  
 Inchcape

What address do you invoice from?

\* Address Line 1

Address Line 2

2 \* City

State

\* Postal Code  *i*

Country United Kingdom

- 3  Use this address for Remit-To *i*  
 Use this for Ship From address *i*

### REQUIRED FOR INVOICING


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

# SETTING UP LEGAL ENTITY

**Vat Registered?** If you are VAT registered enter you VAT number here, you need to add **GB** before the number for it to register.

What is your Tax ID? 

---

Country/Region  

\* VAT ID


I don't have a VAT/GST Number

---

**Not Vat Registered?** If you are not VAT registered tick the ox next to I don't have a VAT/GST Number. The field that appears below is a required field so enter **0000** 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

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# SETTING UP LEGAL ENTITY

Please **DO NOT** add any banking information. This information is held by Inchcape in their ERP system and not held in Coupa. For any amendments, please contact Inchcape directly.

On this page if you choose Address as the payment type, this will mean 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 Address ▼

What is your Remit-To Address?

Address Line 1 23 Sandancer Lane  
Address Line 2 Tyne Bridge  
City North East  
County  
Post Code NE1 4ST  
Country/Region United Kingdom

Cancel Save & Continue



# SETTING UP LEGAL ENTITY

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

×

## Where do you want to receive payment?

1 2 3 4

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

| Remit-To   | Banking information | Status |                        |
|--|---------------------|--------|------------------------|
| 77 North Road<br>Bristol<br>BS16 5LU<br>United Kingdom | None                | Active | <a href="#">Manage</a> |

Deactivate Legal Entity Cancel Next

# SETTING UP LEGAL ENTITY

If the address where you ship goods from is different to your registered office address you can add a separate ship to address if required.

**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 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 |                     |
|--|--------|---------------------|
| 77 North Road<br>Bristol<br>BS16 5LU<br>United Kingdom | Active | <span>Manage</span> |

Deactivate Legal Entity Done

## Setup is now complete!!!

Setup complete x

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.** i

- 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**

# SETTING UP LEGAL ENTITY

Once saved, you'll now see your legal entity. If you've made an error, click on "Actions" then click "Deactivate legal entity" and start again. You cannot edit once saved. Additionally, under actions you can "Manage" which allows you to open the legal entity details to other Coupa customer or add Remit and Ship From addresses

**NOTE:** You should also be able to see the 9 legal entities for Inchcape under customers, if you cannot see this then you are not linked to the Inchcape portal and require an invite to "Link"

## Admin Legal Entity Setup

Add Legal Entity

- Users
- Merge Requests
- Legal Entity Setup**
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

| Legal Entity  |                   |   |   |  |
|---|-------------------|---|---|--|
| JP Motors Ltd   |                   |   |   | <b>Actions</b> ▾   |
| Invoice From  | Remit-To Accounts |   | Locations   | Customers  |
| 23 Sandancer Lane<br>Tyne Bridge<br>North East<br>NE1 4ST<br>United Kingdom | <b>Address</b>    | <b>9 customers</b>  | 23 Sandancer Lane<br>Tyne Bridge<br>North East<br>NE1 4ST<br>United Kingdom | Inchcape<br>Inchcape<br>Inchcape<br>Inchcape<br>Inchcape<br>Inchcape<br>Inchcape<br>Inchcape |
|   | Remit-To Address  | 23 Sandancer Lane<br>Tyne Bridge<br>North East<br>NE1 4ST<br>United Kingdom<br>Active |   |  |

# IMPORTANT INFORMATION

- Please ensure you set up your legal entity correctly. It's extremely important this is correct as it will be visible on all Coupa generated invoice.
- If you are having issues with set up of your profile please contact [GlobalCoupa.Support@Inchcape.com](mailto:GlobalCoupa.Support@Inchcape.com)

**coupa supplier portal** JK | E | NOTIFICATIONS 1 | HELP

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

**Recommended:** Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress: 5/5 Last Updated: 6 minutes ago [Improve Your Profile](#)

### Profile Summary

- 1** Legal Entity [View](#)
- 1** Registered User [View](#)
- 9** Connected Customers

Banking Info Diversity **Accelerate** Bribery Policy

### GB-HO-

- Website
- Industry
- About
- Established
- Top Commodities
- Currencies
- Public Profile [Profile](#)

**Announcements** [View All \(0\)](#)

**One-Click Savings** [View All](#)

**Start saving today!**  
Explore deals for your company, exclusive to the Coupa Community.

**Merge Accounts**  
If your company has multiple CSP accounts, merge them to reduce confusion for your customers. [Learn more](#) [Request Merge](#)

**Latest Customers**

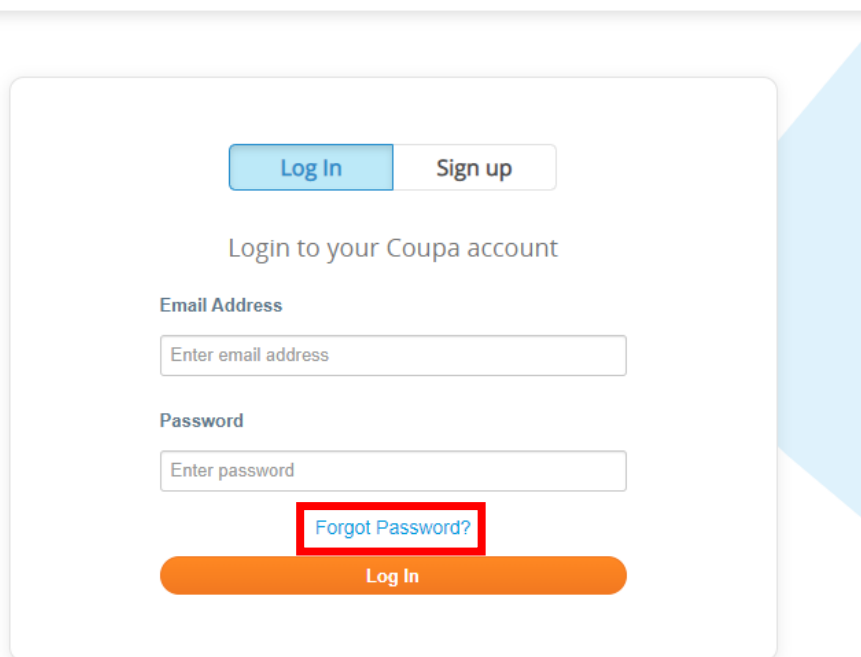
- Inchcape - GB-HO-
- Inchcape - GB-PROP-
- Inchcape - GB-AUD
- Inchcape - GB-POR-
- Inchcape - GB-BMW-

# SIGNING INTO THE CSP

This is the link to the Inchcape Coupa Portal <https://supplier.coupahost.com/sessions/new>.

Use your email address to and the password you created when joining the portal. If you have forgotten your password you can click the “Forgot Password” link. Please remember to use the email address you joined the portal with when requesting a new password.

Note: Inchcape are not able to provide you with your password or create you a new one. This is done by Coupa.

A screenshot of the Coupa login page. At the top, there are two buttons: "Log In" (highlighted in blue) and "Sign up". Below these is the heading "Login to your Coupa account". There are two input fields: "Email Address" with the placeholder text "Enter email address" and "Password" with the placeholder text "Enter password". Below the password field is a link labeled "Forgot Password?" which is highlighted with a red rectangular box. At the bottom of the form is a large orange button labeled "Log In".

Log In Sign up

Login to your Coupa account

Email Address

Enter email address

Password

Enter password

**Forgot Password?**

Log In

# COUPA TRAINING

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## Useful Contacts

Invoice/ Payment Queries - [Enquiries.AccountsPayable@inchcape.co.uk](mailto:Enquiries.AccountsPayable@inchcape.co.uk)

Supplier Statements - [SupplierStatements@inchcape.co.uk](mailto:SupplierStatements@inchcape.co.uk)

Inchcape Coupa Queries - [GlobalCoupa.Support@Inchcape.com](mailto:GlobalCoupa.Support@Inchcape.com)

You can also visit <https://www.inchcape.co.uk/suppliers/>

Where you will find additional guides and support.

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