

SET UP LEGAL ENTITY IN COUPA SUPPLIER PORTAL

Coupa Supplier Portal (CSP) – User Guide

Version 1.0 (August 2023)

1. General Information

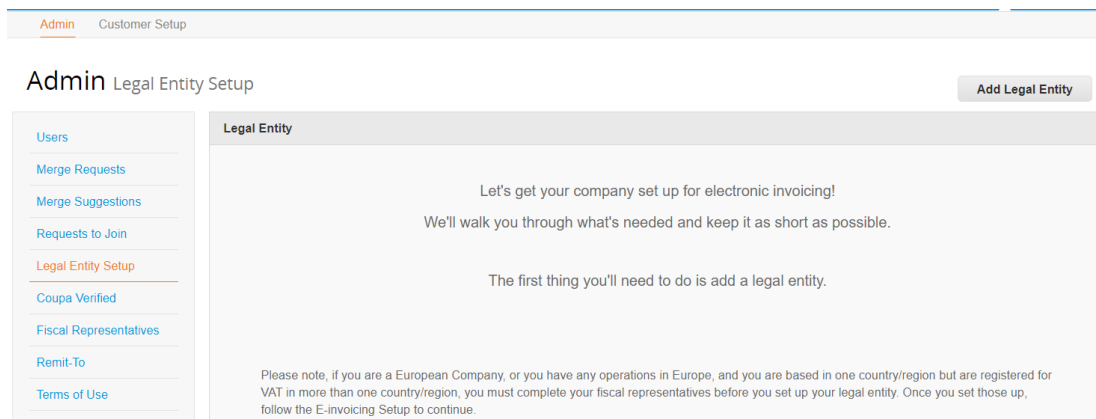
In Coupa you can [set up your legal entities](#) to create electronic invoices. You can add, manage, or deactivate legal entities, or manage remit-to accounts.

When you set up your account to be able to handle electronic invoicing, you need to set up a legal entity, which includes at least one remit-to address.

You can provide more remit-to accounts and add this information to your legal entities so that your customers can use different payment methods when working with you.

2. Create a legal entity

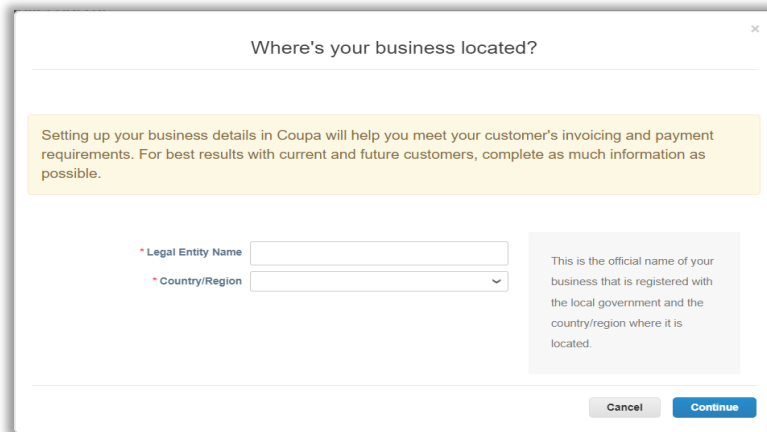
Go to “[Setup](#)” > [Admin](#) and add a legal entity by selecting the “[Add Legal Entity](#)” button in the top right corner.



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Where's your business located?

Enter your **Legal Entity Name** (this is the official name of your business that is registered with the local government) and select the **Country/Region** where it is located.



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.

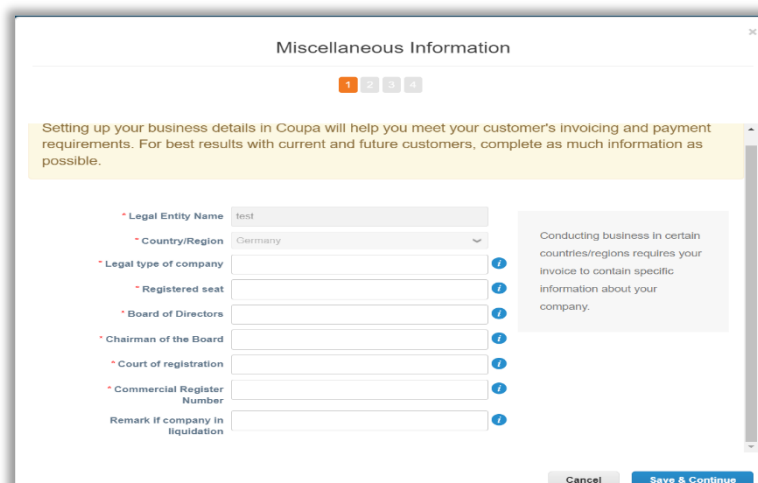
Cancel Continue

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Select "Continue".

Miscellaneous Information

If you need guidance with regard to the content please use the **Information icon** on the right hand side of the field you wish to update. If your company does not have a Board of Directors for example, please enter N/A.



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

* Legal type of company

* Registered seat

* Board of Directors

* Chairman of the Board

* Court of registration

* Commercial Register Number

Remark if company in liquidation

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

Cancel Save & Continue

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What address do you invoice from? What is your TAX ID?

Tell your customers about your organization' fill in at least the mandatory fields marked with a red asterisk (*).

i If you are supplying to more than one Coupa customer, you will need to select whether you wish your legal entity to be available for all of your customers or specific ones.

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Post Code

Country/Region

☒ 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 as where you receive government documents. **i**

What is your Tax ID? **i**

Country/Region

VAT ID

☐ I don't have a VAT/GST Number

[Add additional Tax ID](#)

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Each of the fields are explained in the following table:

Field / Checkbox	Description
Address Line 1	Required for invoicing. Is critical in some countries. Registered address of your legal entity. This is the same location where you receive government documents. It might differ from the physical address.
Address Line 2	No need to fill out
City	Select /Enter the relevant data for your company
State	No need to fill out
Post Code	Select /Enter the relevant data for your company
Country / Region	Select your tax country / region from the drop-down list
Use this address for Remit To **	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or if you have more than one remit-to location.
Use this for Ship from address **	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or if you have more than one location. Tip: include this information on the invoice when the addresses are different For many countries providing this information is mandatory.

What is your Tax ID

Country / Region	Select your tax country / region from the drop-down list
VAT ID	Enter the VAT ID included the prefix to the number – for example, GB1234567890. Tip: you can add more tax IDs by selecting on the Add additional Tax ID link
I don't have a TAX ID Number	Select the checkbox to add your local tax ID or write N/A in the Local Tax ID field

Miscellaneous

Invoice from Code	Please leave this field blank
Preferred Language	Select your language from the drop down list.

**If your remit-to and ship-from addresses are different from your invoice-from address, you will need to also provide that information.

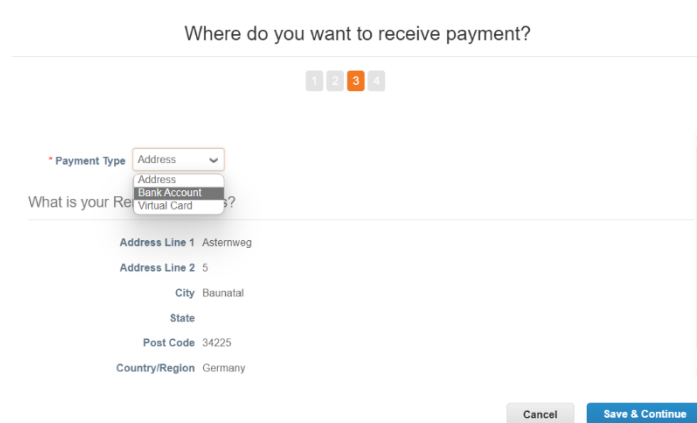


Remit-to addresses ensure global electronic invoice compliance. To meet compliance regulations for most countries outside of the US, an invoice must include a remit-to address and associated tax information. If you want to do business with a customer who enabled compliant invoicing, you need to provide the necessary information.

After completing the fields, select **"Save & Continue"**.

Where do you want to receive payment?

please select **Bank Account** and fill in the necessary banking information.

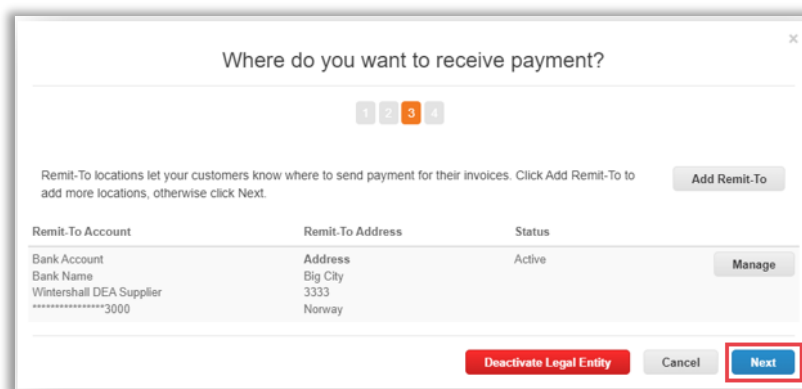


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Adding banking information is mandatory to ensure timely payment. If you wish to have payment to different bank accounts, then details of all accounts must be included in the CSP Supplier Record via Remit-to Address in the Setup.

After completing all the necessary information select **“Save & Continue”**. The following window will appear:



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Select **“Next”** to finalize the set up for 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	
Asternweg 5 Baunatal 34225 Germany	Active	Manage

Deactivate Legal Entity
Done

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Once you have completed the legal entity set up select **“Done”**. After adding a legal entity, you can use it on new invoices.

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

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3. View and manage your legal entity

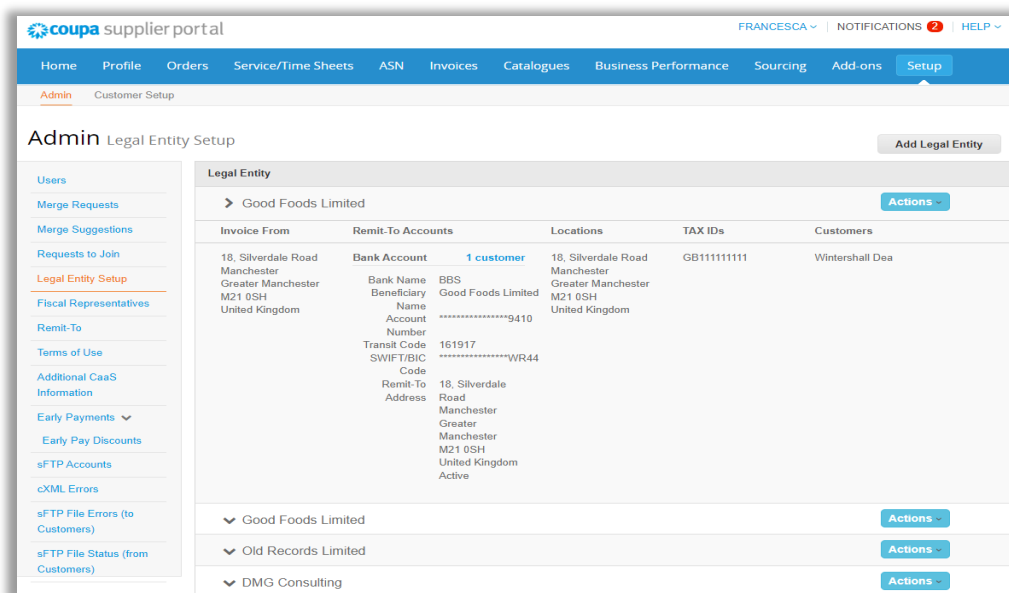
You can manage your legal entities on the [Setup > Admin](#) page:

From the links listed on the left of the Admin page, select [Legal Entity Setup](#).

In case you already set up your legal entity it will be displayed. If you have three or more, the details will be collapsed. To view details, select the down arrows.

Each legal entity has the following sections:

- Invoice From
- Remit-To Accounts – Can be of type: Address, Bank Account, or Virtual Card.
- Locations
- TAX IDs
- Customers – The name(s) and number of customers that you provided with the specific legal entity are also shown. Hovering your cursor over customers displays the name(s) of the customer(s) associated with the legal entity.



The screenshot shows the Coupa Supplier Portal Admin page. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The left sidebar lists various admin functions, with 'Legal Entity Setup' highlighted. The main content area displays the 'Legal Entity Setup' page for 'Good Foods Limited'. It includes a table with columns for Invoice From, Remit-To Accounts, Locations, TAX IDs, and Customers. The table shows details for 'Good Foods Limited', including its address, bank account information, and a list of customers. An 'Add Legal Entity' button is visible in the top right corner of the main content area.

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
18, Silverdale Road Manchester Greater Manchester M21 0SH United Kingdom	Bank Account Beneficiary Name Account Number Transit Code SWIFT/BIC Code Remit-To Address	18, Silverdale Road Manchester Greater Manchester M21 0SH United Kingdom	GB111111111	Wintershall Dea

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