



Setting up e-invoicing

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

—

2019

Setting up your CSP account

01

Setting up e-invoicing

Accept terms of use for e-invoicing



Setting up e-invoicing

Setting up e-invoicing information

1. Once you are logged in to the CSP click on **Admin** in the top menu.

Then click on **E-Invoicing Setup**.

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'EVA', 'NOTIFICATIONS 6', and 'HELP' are on the right. A blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The 'Admin' link is highlighted with a red box. Below the navigation bar, the page title is 'Admin E-Invoicing Setup'. On the right side of this header, there is a button labeled 'Add Legal Entity'. On the left side, there is a sidebar menu with the following items: Users, Merge Requests, E-Invoicing Setup (highlighted with a red box), Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate Preferences, and SFTP Accounts. The main content area is titled 'Legal Entity' and contains the following text: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity.' Below this, a note states: 'Please note, if you are a European Company, or have any operations in Europe, and you are based in one country but are registered for VAT in more than one country, 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 e-invoicing information

2. Then click **Add Legal Entity.**

Please NOTE: All data used in the Legal Entity structure goes on to the legal invoice that Coupa produces. Please ensure this information is accurate.

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal', along with user information 'EVA', a notification bell with '6', and a 'HELP' dropdown. A navigation bar below the header contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is titled 'Admin E-Invoicing Setup'. On the left, a sidebar lists various administrative options: Users, Merge Requests, E-Invoicing Setup (highlighted with an orange underline), Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate Preferences, and SFTP Accounts. The main content area is titled 'Legal Entity' and contains the following text: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity.' Below this, a note states: 'Please note, if you are a European Company, or have any operations in Europe, and you are based in one country but are registered for VAT in more than one country, 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.' A red rectangular box highlights the 'Add Legal Entity' button in the top right corner of the main content area.

Setting up e-invoicing information

3. Enter the **Legal Entity Name** for your company and select the **Country**. Then 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

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

Setting up e-invoicing information

4. Enter **Type of Company** (e.g., Limited, LLP etc.) and then click **Save & 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 *i*

Board of Directors *i*

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

Setting up e-invoicing information

5a. Complete the required information:

Which customers do you want to see this?

Select: **KPMG LLP**

What address do you invoice from?

Enter an invoice address. To use this as the **Remit to** and/or **Ship From** address, select the appropriate check boxes.

Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All

KPMG LLP

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country United Kingdom

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 e-invoicing information

Please NOTE:

Banking Information: Please **DO NOT** complete the Banking Information section. If you need to change your banking information please contact: ukfmaccountspayable@kpmg.co.uk and specify which **REMIT-TO ADDRESS** this relates to, if you hold multiple.

Also, please **DO NOT USE** new **REMIT-TO** addresses before notifying KPMG LLP via ukfmaccountspayable@kpmg.co.uk. Failure to do so will mean that the invoice will be put on hold and the subsequent payment delayed.

Banking information ⓘ 

Bank Account Country:

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

Account Number: ⓘ

Account Number Confirm:

IBAN: ⓘ

SWIFT/BIC Code: ⓘ

Bank Account Type:

Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations). ⓘ

Setting up e-invoicing information

5b. Complete the required information:

What is your Tax ID:?

Enter your tax country and ID.

Miscellaneous: Enter an **Invoice From Code** and a preferred language to use in the CSP.

Please NOTE: If you are VAT registered, please ensure your VAT registration is accurate - as this will form part of all of the invoices that Coupa generates on your behalf.

5c. If you don't have a VAT ID, you can check the **I don't have a VST/GST Number** box. Then fill in the **Local Tax ID** field (E.g. With your company number).

Then click **Save & Continue**.

The screenshot shows a form titled "What is your Tax ID?". The "Country" dropdown is set to "United Kingdom". The "VAT ID" field is empty. There is a checkbox for "I don't have a VAT/GST Number" which is currently unchecked. Below this is a link for "Add additional Tax ID". The "Miscellaneous" section is highlighted with a red box and contains an "Invoice From Code" field (empty) and a "Preferred Language" dropdown set to "English (UK)". At the bottom right, there are "Cancel" and "Save & Continue" buttons, with the latter highlighted by a red box.

This screenshot shows the same form as above, but with the "I don't have a VAT/GST Number" checkbox checked. The "Local Tax ID" field is now filled with "GB123" and is highlighted with a red box. The "VAT ID" field remains empty.

Setting up e-invoicing information

6a. Where do you want to receive payment?

If you would like to receive payments different to the address that you invoice from, click **Add Remit-To** and add a new address. If you would like to use the same address, click **Next**.

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	
1st St Peter's Square Manchester M2 3AE United Kingdom	None	Active	Manage

Deactivate Legal Entity **Cancel** **Next**

Setting up e-invoicing information

Please **NOTE: Banking Information:** Please **DO NOT** complete the Banking Information section. If you need to change your banking information please contact: ukfmaccountspayable@kpmg.co.uk and specify which **REMIT-TO ADDRESS** this relates to, if you hold multiple.

Also, please **DO NOT USE** new **REMIT-TO** addresses before notifying KPMG LLP via ukfmaccountspayable@kpmg.co.uk. Failure to do so will mean that the invoice will be put on hold and the subsequent payment delayed.

Where do you want to receive payment?

1 2 3 4

What is your Remit-To Address?

* Address Line 1

Address Line 2

* City

State

* Postal Code

* Country

RECOMMENDED

If you receive payments to a different location to where your business is registered, add the address here.

Integration Information ⓘ

Code

Show fewer fields ▾

Banking information ⓘ

Bank Account Country:

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

Account Number:

Account Number Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type:

Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations).

Setting up e-invoicing information

Remit-To Contact

First Name

Last Name

Email

Work Phone

Mobile Phone

Fax Number

Web Site

Which customers do you want to see this?

All

KPMG LLP DEV

6b. If you selected **Add Remit-To** in Step 5a, check the box **KPMG LLP** under **Which customers do you want to see this?**

Remit-To Contact is optional.

Click **Save & Continue**. Then Click **Next**

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.

Remit-To	Banking information	Status	
1st St Peter's Square Manchester M2 3AE United Kingdom	None	Active	<input type="button" value="Manage"/>
2 test Manchester M3 7DL United Kingdom	None	Active	<input type="button" value="Manage"/>

Setting up e-invoicing information

7a. Where do you ship goods from?

If you ship goods from a location different to the address that you invoice from, click **Add Ship From** and add a new address. If you would like to use the same address, click **Done**.

Please NOTE: It is important for tax purposes, that you reflect where you may ship goods from if it is different to your legally registered country.

For example, if you are registered in the UK but ship goods from a warehouse in Poland, please ensure that you add this address here to reflect this accurately when it comes to creating invoices.

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	
1st St Peter's Square Manchester M2 3AE United Kingdom	Active	Manage

Deactivate Legal Entity **Done**

Setting up e-invoicing information

Where do you ship goods from?

1 2 3 4

What is your Ship From Address?

* Address Line 1

Address Line 2

* City

State

* Postal Code

* Country

What is the physical address that your goods are shipped from? This can be a warehouse address.

Integration Information ⓘ

Code

Show fewer fields ▾

7b. If you choose **Add Ship From**, complete the required fields:

What is your Ship From Address?

Which customers do you want to see this? Select KPMG LLP

Click **Continue**.

Contact Information

First Name

Last Name

Email

Work Phone

Mobile Phone

Fax Number

Web Site

Which customers do you want to see this?

All

KPMG LLP DEV

Cancel

Setting up e-invoicing information

7c. Click **Done** once you've confirmed your ship goods from address.

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	
1st St Peter's Square Manchester M2 3AE United Kingdom	Active	Manage
test 2 Manchester M3 7DL United Kingdom	Active	Manage

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

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 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](#)

8. You will then see a **Setup Complete** pop-up window. Click **Return to Admin** to go back to the main interface.

Setting up e-invoicing information

9. After saving a Legal Entity, it will appear in the **E-Invoicing Setup** section under **Admin**. Click on the **Action** button for each legal entity. You can see two options: **Manage** and **Deactivate Legal Entity**.

10. As CSP allows suppliers to do business with multiple clients you can have different E-Invoicing / Legal Entity information set up for each client.

Click **Manage** to make the Legal Entity visible/invisible to a supplier.

The screenshot displays the 'Admin E-Invoicing Setup' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' section is active, and the 'E-Invoicing Setup' menu item is highlighted in the left sidebar. The main content area shows a table of legal entities. The first entity is 'Test Supplier EW Tax' with a Tax ID of 'GB123'. The 'Actions' dropdown menu for this entity is open, showing 'Manage' and 'Deactivate Legal Entity' options. The 'Remit-To Address' and 'Ship From Address' fields are also visible for this entity.

Setting up e-invoicing information

11. If you've made a mistake, i.e. entered and saved a wrong VAT ID, Address, etc. you cannot amend the saved information.

You will have to click on **Deactivate Legal Entity** and the whole record of that legal entity will be deactivated. The information will be gone from your Legal Entity section.

12. You will then have to click on **Add Legal Entity** and re-enter new legal entity information from the beginning.

The screenshot displays the 'Admin E-Invoicing Setup' interface in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The sidebar on the left lists various administrative functions, with 'E-Invoicing Setup' highlighted in red. The main content area is titled 'Legal Entity' and features a table with the following data:

Legal Entity	Tax ID	Actions
Test Supplier EW Tax 3 test test T est United Kingdom	GB123	Manage Deactivate Legal Entity

Below the table, there are sections for 'Remit-To Address' and 'Ship From Address', each containing placeholder text: '3 test', 'test', 'T est', and 'United Kingdom'. A second 'Actions' dropdown is visible at the bottom right of the table.



Accepting terms of use for e-invoicing

Accepting terms of use

1. Go to **Admin**, and choose **Terms of Use**. Accept Terms of Use by clicking **I Accept**.

Please NOTE: As part of the Coupa terms and conditions you explicitly agree to Coupa issuing invoices on your behalf.

From a VAT perspective, this means that the PDF generated by Coupa is your legal invoice (as well as KPMG's as your customer).

You must archive this invoice in line with your legal retention periods and requirements. Please do not attach an invoice from your system after signing up to these terms.

2. The **Acceptance History** shows when you've accepted the Terms of Use.

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons **Admin**

Admin Terms of Use

Select Customer KPMG LLP DEV

- Users
- Merge Requests
- E-Invoicing Setup
- Fiscal Representatives
- Remit-To
- Terms of Use**
- Coupa Accelerate Preferences
- SFTP Accounts

Acceptance Required

The Terms of Use governing your use of Coupa Open Business Network have been updated. Please review them and confirm acceptance of the new [Terms of Use](#) by clicking the 'I Accept' button. If you do not agree, you will not be able to use system integration channels (cXML and EDI) to send compliant e-invoices.

I Accept

Acceptance History

Acceptance History

1. [Terms of Use](#) accepted by TEST Supplier EW on 04/24/2019 at 01:44 PM



Thank you



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

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