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## 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.

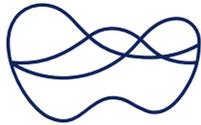
When you set up your account to be able to handle electronic invoicing, you need to set up a legal entity, which includes at least one remit-to address.

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.

The screenshot shows the 'Admin' section of the Coupa Supplier Portal. The breadcrumb trail is 'Admin > Customer Setup'. The main heading is 'Admin Legal Entity Setup'. On the right side, there is a button labeled 'Add Legal Entity'. On the left side, there is a navigation menu with the following items: 'Users', 'Merge Requests', 'Merge Suggestions', 'Requests to Join', 'Legal Entity Setup' (which is highlighted with an orange underline), 'Coupa Verified', 'Fiscal Representatives', 'Remit-To', and 'Terms of Use'. The main content area is titled 'Legal Entity' and contains the following text: '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.' At the bottom of the main content area, there is a note: '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.'



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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

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:

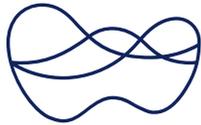
Field/Checkbox	Description
<b>Address Line 1</b>	Required for invoicing. Is critical for compliance in some countries. Registered address of your legal entity. This is the same location where you receive government documents. It might differ from the physical address.
<b>Address Line 2</b>	No need to fill out
<b>City</b>	Select/enter the relevant data for your company
<b>State</b>	No need to fill out
<b>Post Code</b>	Select/enter the relevant data for your company
<b>Country/Region</b>	Select your tax country/region from the drop-down list
<b>Use this address for Remit-To**</b>	Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
<b>Use this for Ship From address**</b>	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or 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?

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

Miscellaneous

<b>Invoice from Code</b>	<b>Please leave this field blank</b>
<b>Preferred Language</b>	Select your language from the drop-down list



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

- i** **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.

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-to Address?

Address Line 1 Asterweg

Address Line 2 5

City Baunatal

State

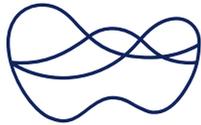
Post Code 34225

Country/Region Germany

Cancel Save & Continue

- !** **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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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	
Bank Account Bank Name Wintershall DEA Supplier *****3000	Address Big City 3333 Norway	Active	<a href="#">Manage</a>

[Deactivate Legal Entity](#) [Cancel](#) [Next](#)

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	<a href="#">Manage</a>

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

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

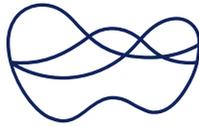
Congratulations!

This legal entity can now be used on new invoices.

**To get paid** – Most customers require that you send them this payment info in **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 'Admin' page in the Coupa Supplier Portal. The 'Legal Entity Setup' section is active, displaying details for 'Good Foods Limited'. The page includes a navigation menu on the left with options like 'Users', 'Merge Requests', and 'Legal Entity Setup'. The main content area shows a table with columns for 'Invoice From', 'Remit-To Accounts', 'Locations', 'TAX IDs', and 'Customers'. The 'Remit-To Accounts' section is expanded, showing details for a 'Bank Account' with fields for Bank Name, Beneficiary Name, Account Number, Transit Code, and SWIFT/BIC Code. The 'Locations' section shows the address: 18, Silverdale Road, Manchester, Greater Manchester, M21 0SH, United Kingdom. The 'Customers' section shows 'Wintershall Dea'. There are 'Actions' buttons for each legal entity listed.

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
18, Silverdale Road Manchester Greater Manchester M21 0SH United Kingdom	<b>Bank Account</b> <span>1 customer</span> Bank Name: BBS Beneficiary Name: Good Foods Limited Account Number: *****9410 Transit Code: 161917 SWIFT/BIC Code: *****WR44	18, Silverdale Road Manchester Greater Manchester M21 0SH United Kingdom	GB111111111	Wintershall Dea
▼ Good Foods Limited <span>Actions</span>				
▼ Old Records Limited <span>Actions</span>				
▼ DMG Consulting <span>Actions</span>				