Setting up e-invoicing

Coupa Supplier Portal (CSP) training
Setting up your CSP account

01 Setting up e-invoicing

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1. Once you are logged in to the CSP click on **Admin** in the top menu.
   Then click on **E-Invoicing Setup**.
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.
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.

[Continue button]
Setting up e-invoicing information

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

[Form Image]

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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.
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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.
Setting up e-invoicing information

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

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

Acceptance History

1. Terms of Use accepted by TEST Supplier EW on 04/24/2019 at 01:44 PM
Thank you