



Supplier Portal

-

Setting up a legal entity




Step One

Start the “Add a legal entity” process

Catalogues Business Performance Sourcing

On the landing page click “View” in the Legal Entity Panel

 **New:** Exclusive discounts for your business to thank you for being a part of the Coupa Community.

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

Profile Progress

 44% Complete

Last Updated

 about 3 hours ago

[Improve Your Profile](#)

Profile Summary



1

Legal Entity
[View](#)



1

Registered User
[View](#)




1

Connected Customer

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 more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Step Two

Start entering your information

Admin Legal Entity Setup

Add Legal Entity

Legal Entity

Sadia Limited Estates

Actions ▾

Invoice From

Remit-To Accounts

Suppliers

Customers

123 Test Road
London
NW10 0PJ

Address

Remit-To Address 123 Test Road
London
NW10 0PJ
United Kingdom
Active

123 Test Road
London
NW10 0PJ
United Kingdom

FirstPort

On the Admin page
select "Add Legal
Entity"

Address [1 customer](#)

Remit-To Address 123 Test Road
London
NW10 0PJ
United Kingdom
Active

Step Three

Business Name and Location 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

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

Enter the relevant information in the boxes and select "Continue"

Cancel Continue

- Admin
- Legal Entity Setup
- Users
- Merge Requests
- Fiscal Representat
- Remit-To
- Terms of Use
- Payment Preferenc
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

Step Four

Fill in the "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

*** Type of Company**

Board of Directors

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

Click on the blue circles for guidance on what to add into the boxes
Select "Save and Continue" when complete

- Admin
- Legal Entity Setup
- Fiscal Representat
- Remit-To
- Terms of Use
- Payment Preferenc
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

Step Five Tell your customers about your organisation

your organisation

On the "Tell your Customer" page fill in all the relevant boxes

Which customers do you want to see this?

- All
- FirstPort

Choose the customer options

What address do you invoice from?

* Address Line 1

Address Line 2

* City

County

* Post Code

Country/Region United Kingdom

REQUIRED FOR INVOICING

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

Enter your invoice address here and select your invoicing options below

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

Step Six

Select the Legal entity panel on the landing page

Legal Entity Setup

Fiscal Representat

Remit-To

Terms of Use

Payment Preferenc

Static Discounting

SFTP Accounts

cXML Errors

SFTP Errors

What is your Tax ID? i

Country/Region x

* VAT ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code i

Preferred Language

On the "Tell your Customer" page fill in all the relevant boxes

Confirm VAT status

Enter your code here to link addresses

Cancel

Save & Continue

Step Seven

Receiving payments information

Receive payment?

* Payment Type
Bank Account
Virtual Card

What is your Remit-To Address?

Address Line 1 52 a
Address Line 2 Baker Street
City Watford
County Herts
Post Code WD5 4PQ
Country/Region United Kingdom

Cancel Save & Continue

Click the arrow to reveal the dropdown box

Choose your payment preference
Select "Save and Continue" when complete

Step Eight Confirm "Remit - To" addresses

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 Account	Remit-To Address	Status	
Bank Account Barclays Miked Associates *****5678 789345	52 a Baker Street Watford Herts WD5 4PQ United Kingdom	Active	Manage

Deactivate Legal Entity | Cancel | Next

Confirm Remit to Address

Add in extra addresses if required here

Select "Next" when complete

- Admin
- Legal Entity Setup
- Users
- Merge Requests
- Fiscal Representat
- Remit-To
- Terms of Use
- Payment Preferenc
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

Step Nine Confirming "Ship From" address

Admin

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representat
- Remit-To
- Terms of Use
- Payment Preferenc
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

from?

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
52 a Baker Street Watford Herts WD5 4PQ United Kingdom	Active

Manage

Deactivate Legal Entity **Done**

Confirm "Ship From" address
 Add more here if needed
 Select "Done" when complete

Step Ten

Confirmation of Legal Entity Added



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

Select "Done" to finalise the process

Step Eleven

Check and Manage Legal Entity details

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				
Miked Associates				Actions ▾
Invoice From	Remit-To Accounts		Locations	Customers
52 a Baker Street Watford Herts WD5 4PQ United Kingdom	Bank Account 1 customer Bank Name Barclays Beneficiary Name Miked Associates Account Number *****5678 Transit Code 789345 Remit-To Address 52 a Baker Street Watford Herts WD5 4PQ United Kingdom Active		52 a Baker Street Watford Herts WD5 4PQ United Kingdom	FirstPort
Sadia Limited Estates				Actions ▾
Invoice From	Remit-To Accounts		Locations	Customers
123 Test Road London NW10 0PJ United Kingdom	Address 1 customer Remit-To Address 123 Test Road London		123 Test Road London NW10 0PJ United Kingdom	FirstPort

On the "Admin" page

Click "Actions" to amend any information within the Legal Entity details

Step Twelve

Legal Entities confirmed

On the Landing page confirm that the new entity has been set up

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

Profile Progress

50% Complete

Last Updated

12 minutes ago

[Improve Your Profile](#)

Profile Summary

2
Legal Entities
[View](#)

1
Registered User
[View](#)

1
Connected Customer

- Banking Info
- Diversity
- Acceleration
- Bribery Policy

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

One-Click Savings [View All](#)

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Merge Accounts

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Not seeing the account you want to merge with? [Click here.](#)

Sadia Limited Estates



Website <https://www.sadiaestates.com>
Industry Plumbing, heat and air-conditioning...
About Plumbing and Aircon solutionsns

The number of legal entities on the account will be shown here

Customers