



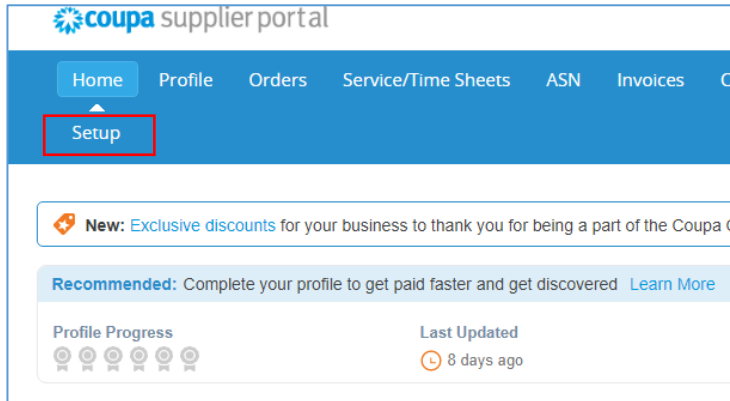
SETTING UP YOUR LEGAL ENTITY IN COUPA

QUICK REFERENCE GUIDE

HOW TO SET UP YOUR LEGAL ENTITY TO ENABLE ELECTRONIC INVOICING

(Increase the zoom to view the screenshots clearly.)

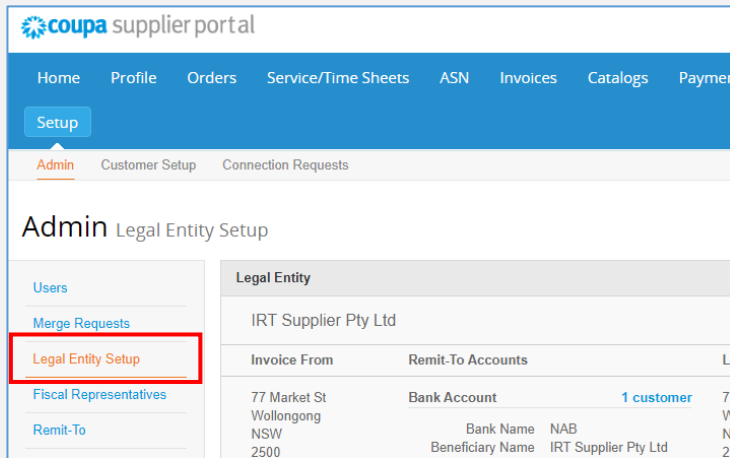
This guide will step you through how set up your legal entity to enable electronic invoicing via the Coupa Supplier Portal or via a supplier actionable e-mail.



Step 1

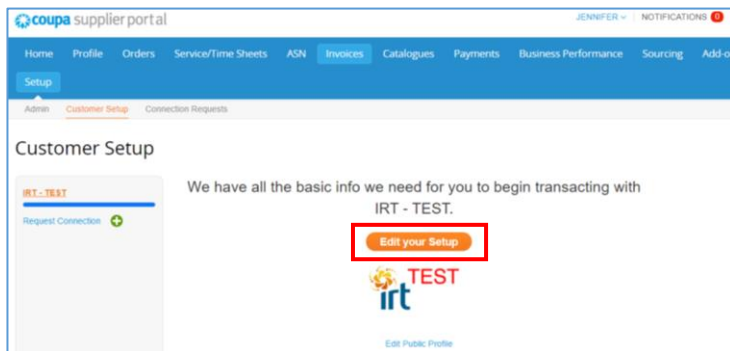
Log into your Coupa Supplier Portal.

From the home page click on the set up option



Step 2

Select the Legal Entity Setup option.



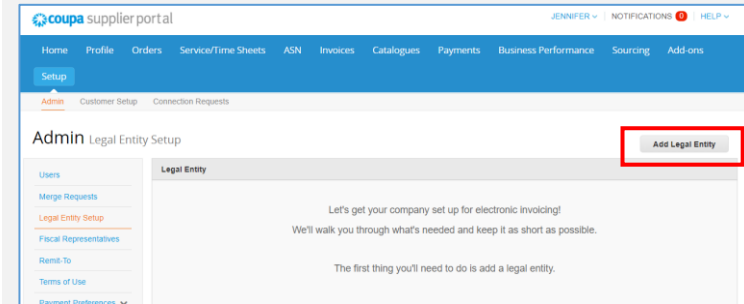
Step 3

Select the Edit your setup button.



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Step 4

Select the Add Legal Entity button to ensure your company is set up for electronic invoicing.

Note: Completing the following steps ensures that if you participate in electronic invoicing, you are submitting a tax compliant invoice.

The screenshot shows a form titled 'Where's your business located?'. It includes a yellow informational banner and a form with the following fields:

- Legal Entity Name:** IRT Supplier Pty Ltd (highlighted in a red box)
- Country/Region:** Australia (highlighted in a red box)

Below the form are 'Cancel' and 'Continue' buttons, with the 'Continue' button highlighted in a red box. A tooltip on the right explains: 'This is the official name of your business that is registered with the local government and the country/region where it is located.'

Step 5

- Enter your legal entity name.
- Ensure the country/region is updated correctly.

Your legal entity name is as per the [Australian Business Register](#).



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Tell your customers about your organisation

Which customers do you want to see this?

All
 IRT - TEST

What address do you invoice from?

* Address Line 1 5 Test st
Address Line 2
* City Sydney
State New South Wales - NSW
* Post Code 2000
Country/Region Australia

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

What is your Tax ID?

Country/Region Australia
* ABN 11 111 111 111
 I don't have ABN Number

Miscellaneous

Invoice-From Code
Preferred Language English (Australia)

Cancel Save & Continue

Step 6

This screen will not be pre-populated from information IRT has on file. *This screenshot shows the mandatory requirements and default settings.*

- Complete all mandatory requirements on this page as marked with an asterisk.
- You can nominate the visibility level of your profile by leaving the default setting, or by unselecting All, and just selecting IRT.
- Enter your invoicing address.
- Update your ABN number.
- Select the Save & Continue button located at the bottom right hand side of the page.

Where do you want to receive payment?

* Payment Type Address

What is your Remit-To Address?

Address Line 1 5 Test st
Address Line 2
City Sydney
State NSW
Post Code 2000
Country/Region Australia

Cancel Save & Continue

Step 7

- Because IRT already has your bank account information set up in Coupa, leave the payment type as Address.
- Select the Save & Continue button located at the bottom right hand side of the page.



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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	
Address	5 Test st Sydney NSW 2000 Australia	Active	Manage

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

Step 8

- Select the Next button.

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	
5 Test st Sydney NSW 2000 Australia	Active	Manage


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

Step 9

- Select the Done button.

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](#) [Done](#)

Step 10

- Select the Done button.

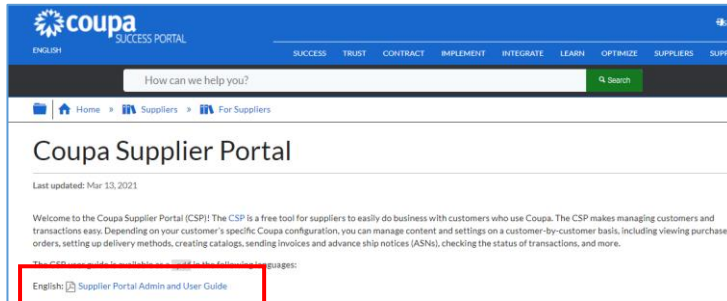
This completes the registration process for IRT suppliers.

You are now active to receive communications from IRT, including purchase orders and notifications of expiring or expired compliance documents.



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Step 11

Coupa provides an extensive Coupa Supplier Portal (CSP) user guide for suppliers.

The document can be found at the following link - [Coupa Supplier Portal Admin and User Guide](#) , along with other information about the CSP