

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.

coupa supplier	rportal					Step 1
Home Profile	Orders S	Service/Time Sheets	ASN	Invoices	Ci	Log into your Coupa Supplier Portal.
New: Exclusive disco	unts for your t	ousiness to thank you for	being a p	art of the Cou	pa C	From the home page click on the set up option
Recommended: Complete	e your profile	to get paid faster and ge	discover	ed Learn Mor	e	
Profile Progress		Last Updated				

🗱 coupa supplier p	oortal				Step 2
Home Profile O	rders Service/Time S	heets ASN In	voices Catalogs	Paymen	option.
Setup					
Admin Customer Setup	Connection Requests				
Admin Legal Enti	ty Setup Legal Entity				
Admin Legal Enti	ty Setup	l fd			
Admin Legal Enti Users Merge Requests	ty Setup Legal Entity IRT Supplier Pty	Ltd			
Admin Legal Enti Users Merge Requests Legal Entity Setup	ty Setup Legal Entity IRT Supplier Pty Invoice From	Ltd Remit-To Accoun	ts	Lc	
Admin Legal Entil Users Merge Requests Legal Entity Setup Fiscal Representatives	ty Setup Legal Entity IRT Supplier Pty Invoice From 77 Market St	Ltd Remit-To Accoun Bank Account	ts 1 custor	Lc ner 77	



Step 3

Select the Edit your setup button.



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Coupa supplier por	rtal	JENNIFER - NOTIFICATIONS 0 HELP	Sten 4
Home Profile Orde Setup Admin Customer Setup Admin Legal Entity S	ns Servico/Time/Sheets ASN Invoices Catalogues Payments B Connection Repeats Setup	usiness Performance Sourcing Addions	Select the Add Legal Entity button to ensure your company is set up for electronic invoicing.
Users Merge Requests	Legal Entity Let's get your company set up for electro	mic invoicing!	Note: Completing the following
Egge Enny Setup Fiscal Representatives Remit-To Terms of Use Payment Performances	We'll walk you through what's needed and keep it The first thing you'll need to do is add a	t as short as possible. Iegal entity.	steps ensures that if you participate in electronic invoicing, you are submitting a tax compliant invoice.
	Where's your business located	1?	 Step 5 Enter your legal entity name. Ensure the country/region is undeted correctly.
requirements. For possible.	best results with current and future customers, compl	lete as much information as	updated correctly.
° Leg	gal Entity Nam IRT Supplier Pty Ltd Country/Regior Australia	This is the official name of your business that is registered with the local government and the country/region where it is located.	Your legal entity name is as per the <u>Australian Business Register</u> .
		Cancel	



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Which customers do you w	vant to see this?	
Z All Z IRT - TEST		
What address do you invoi	ice from?	
* Address Line 1	5 Test st	
Address Line 2		REQUIRED FOR INVOICING
* City	Sydney	Enter the registered address of
State	New South Wales - NSW *	same location as where you
* Post Code	2000	receive government
Country/Region	Australia	uoonnenia.
	🛛 Use this address for Remit To 🕧	
	🛛 Use this for Ship-From address 🕖	
What is your Tax ID? 🕧		
Country/Region	Australia 🗸	x
* ABN	11 111 111 111	
	I don't have ABN Number	
Add addi	tional Tax ID	
Aiscellaneous		
Invoice-From Code		
Preferred Language	English (Australia)	

Step 6

This screen will not be prepopulated 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.

V	mere do	you want to recei	ive payment?	
		1 2 3 4		
* Payment Type Address	~			
What is your Remit-To Add	Iress?			
Address Line 1	5 Test st			
Address Line 2				
City	Sydney			
State	NSW			
	2000			
Post Code				
Post Code Country/Region	Australia			

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?		Step 8
	123			• Select the Next button.
Remit-To locations let your add more locations, otherw	customers know where to send payment for vise click Next.	r their invoices. Click Add Remit-To to	Add Remit-To	
Remit-To Account	Remit-To Address	Status		
Address	5 Test st Sydney NSW 2000 Australia	Active	Manage	
		Deactivate Legal Entity	Cancel	
	Where do you shi	p goods from?		Step 9
	123	4		 Select the Done button.
stralia		Deactivate Leg	jal Entity Done	
	Setup con	ıplete		Step 10
	123	1		• Select the Done button.
				This completes the registration
				process for IRT suppliers.
	•			You are now active to receive
	Congratula	ations!		communications from IRT,
	This legal entity can now be	used on new invoices.		including purchase orders and notifications of expiring or expire
To get paid – Most providing it on the Click on the Profile Otherwise, you'll ha	customers require that you send to a invoice. Tab to see if your customer has a ave to send it to them through anot	hem this payment info in in add form that collects payment infor her channel.	lition to mation.	compliance documents.



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										SUPPO
	How can we help you?									
Home	» IN Suppliers » IN For Supplier	2								
Cup	Supplier Port									
Joupa	a Supplier For	ai								
at updated: Mar	13,2021									
elcome to the Co	pupa Supplier Portal (CSP)! The CSP is a fr	ee tool for suppli	ers to easi	ily do business	with customers	who use Coup	. The CSP m	akes managi	ng customers	and
insactions easy.	Depending on your customer's specific Co delivery methods creating catalogs sendi	upa configuratio	n, you can dvance sh	manage conter	nt and settings of the setting	in a customer-l	actions and	basis, includ	ing viewing pu	irchase
ders setting up a					all enseming the					
ders, setting up o	a le suallable as a locif in the following lag	cuaxes:								

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pa provides an extensive Coupa plier Portal (CSP) user guide for pliers.

document can be found at the owing link - <u>Coupa Supplier</u> tal Admin and User Guide, ng with other information about the CSP