

Coupa Supplier Portal User Guide

How to set up legal entities



Set up Legal Entities

You can set up your account to create electronic invoices from the Admin > Legal Entity Setup page. You can add, manage, or deactivate legal entities, or manage remit-to accounts.

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.

View and manage legal entities

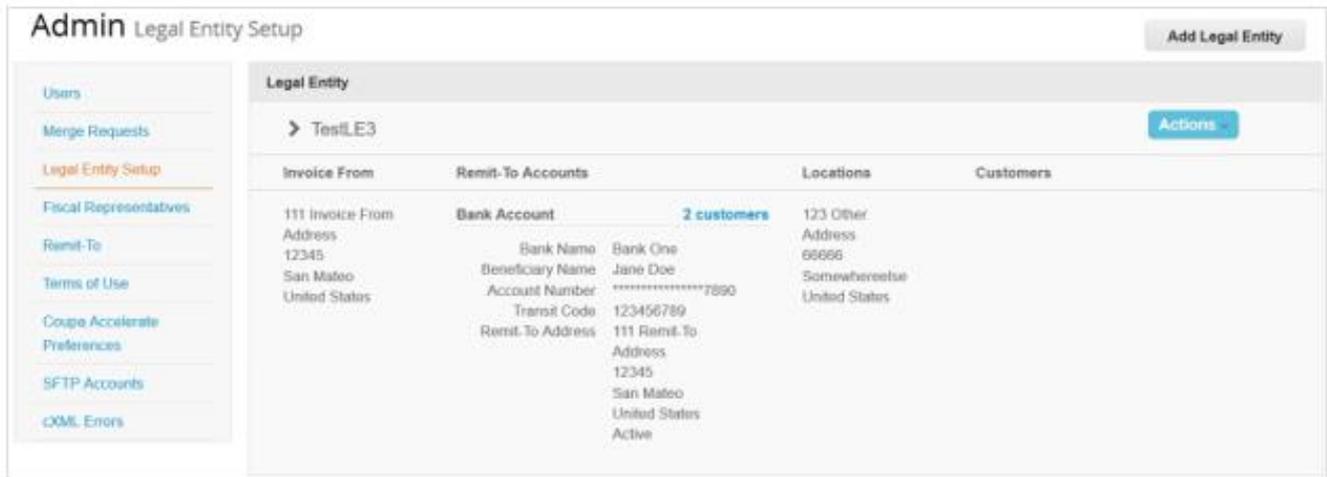
On the left of the Admin page, click on the Legal Entity Setup link.



If you have three or more legal entities, they are collapsed. To view their details, click on 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
- 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.



Create a legal entity

To add a legal entity, click on the Add Legal Entity button in the top right corner.

Enter the official name of your business that is registered with the local government (legal entity name) and select the country/region where it is located. Click Continue, and in the appearing Tell your customers about your organization window, fill in at least the mandatory fields, that is, the fields marked with a red asterisk (*).

Field/Checkbox	Description
What address do you invoice from?	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. Sometimes this is called your address of record or registered company address. Address line 1, city, and postal code are mandatory.
Land/Region	The country/region you selected when adding the legal entity.
Use this address for Remit-To*	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.
Use this for Ship From address*	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, including this information is mandatory.

What is your Tax ID?	<p>Enter your tax/VAT ID.</p> <p>Note: If you are exempt from tax registration in some regions/countries, select the I don't have TAX ID Number checkbox and enter your local tax ID or write N/A in the appearing Local Tax ID field.</p>
Country/Region	<p>Select your tax country/region from the drop-down list.</p>
Tax/VAT ID	<p>Enter the tax/VAT ID, including the prefix to the number, for example, GB1234567890.</p> <p>Tip: You can add more tax IDs by clicking on the Add additional Tax ID link.</p>
I don't have a TAX ID Number	<p>Select the checkbox to add your local tax ID or write N/A in the Local Tax ID field.</p>
Miscellaneous	
Invoice from Code	<p>Tie your CSP invoice-from address (that is, registered address) with the corresponding address in your ERP.</p>
Preferred Language	<p>Select your language from the drop-down list.</p>

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

After filling in the fields, click **Save and Continue**. In the appearing 'Where do you want to receive payment?' window, if available, please select 'Bank account' and fill in the necessary banking information. Adding banking information is mandatory in order to ensure timely payment. The Where do you want to receive payment window shows both the Remit-To Account and the Remit-To Address.

Where do you want to receive payment?

1 2 3 4

* Payment Type Address

Address
Bank Account
 Virtual Card

What is your Remit-To Address?

Address Line 1 Cappelens vei 178

Address Line 2

City Oslo

State

Post Code 1162

Country/Region Norway

Cancel
Save & Continue

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	222 Invoice From Address Big City 33333 United States	Active

Manage

Deactivate Legal Entity
Cancel
Next

To manage your legal entities, click on the Actions button on the Legal Entity Setup page, select Manage Legal Entity, and click Continue, then on the Tell your customers about your organisation window click Continue again. In the appearing Where do you want to receive payment window, you can add a new remit-to address.

You can deactivate a legal entity by selecting Deactivate Legal Entity from the Actions button or on any of the appearing windows.

Click Next to add the address where you want to ship goods from, if it is different from the remit-to address. Fill in at least the mandatory fields and click Continue.

After completing the legal entity setup by clicking Done, that is, after adding a legal entity, you can use it on new invoices. From the Setup Complete page you can choose to Go to Orders, Go to Invoices, or Return to Admin page.

To manage your remit-to accounts, go to Setup > Admin > Remit-To.



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.** 

- 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

[https://success.coupa.com/Suppliers/For Suppliers/Coupa Supplier Portal](https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal)