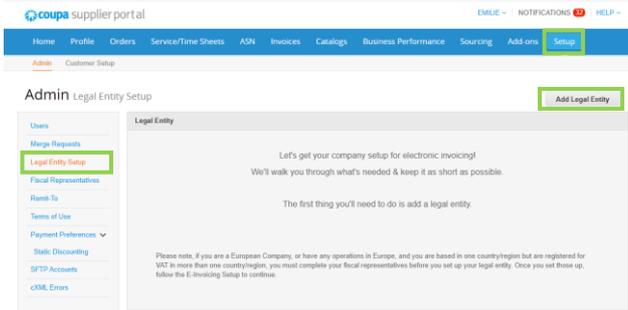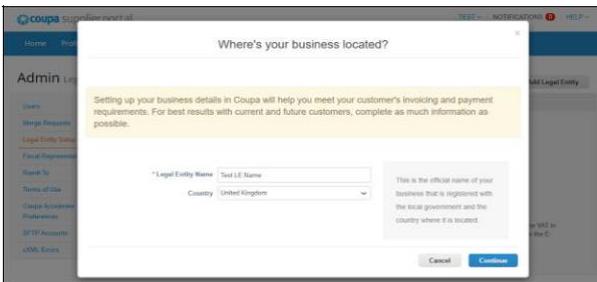# COUPA SUPPLIER PORTAL – E-INVOICING CONFIGURATION

> **STEP 1 - Create a Legal Entity**

1. Go to the **Setup** tab, select the **Legal Entity Setup** option, and click on the **Add Legal Entity** button.

**2.** Fill in your **Legal Entity Name** and **Country**.

3. Fill in the **Type of Company** and **Board of Directors** (optional). The fields here can differ based on the country selection. To find out more informations about each field, please mouseover the "i" symbol.
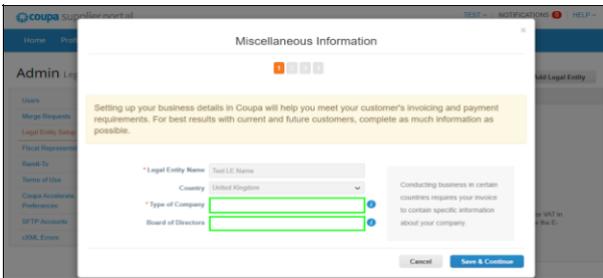
4. Make sure that **Procter & Gamble** is selected as a customer and fill in the address and the VAT number.

If the **Remit-To** and/or **Ship-From** address is not the same, untick the box and you will be asked to add the corresponding address on the next page.

If your company does not have a **VAT ID**, tick the box "**I don't have a VAT/GST Number**" and fill in your **Local Tax ID** instead.
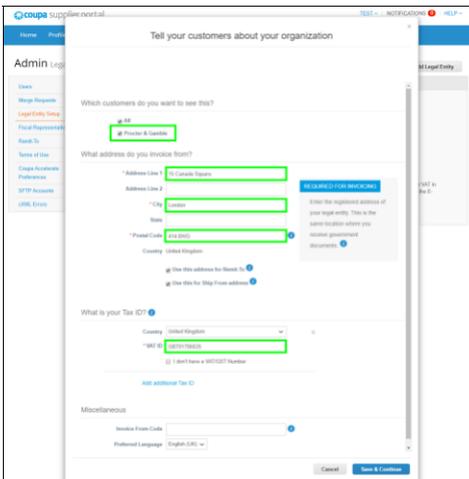
5. Select the **Payment Type** as **Bank Account**. The payment is made based on your banking details found in our ERP system. The **Banking Information** written in Coupa is only used to be displayed on the legal copy of the invoice, therefore, you can leave it empty.
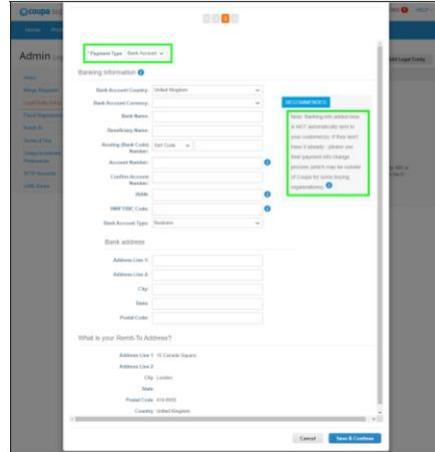
6. Moving further, you will be asked to review your **Remit-To** address and **Ship From** address respectively. Here you can do a last moment modification or add additional addresses.
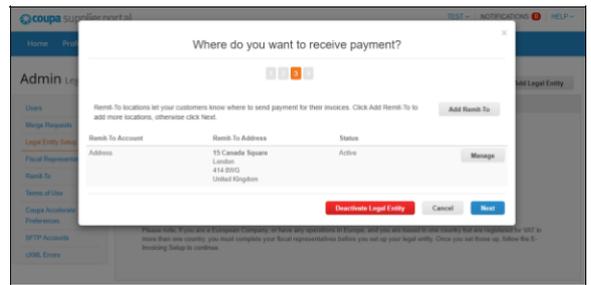
7. As a final step, after the setup is completed, you must return to the **Admin** tab and accept the **Terms of Use**.

Setup Complete!
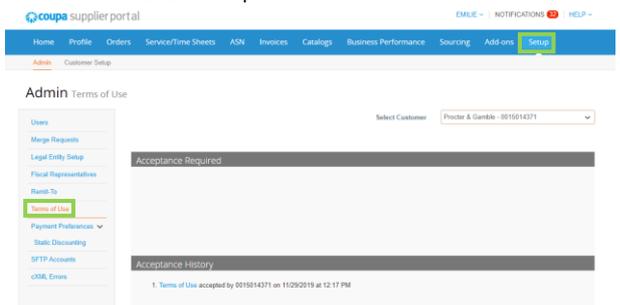
You have successfully created a Legal Entity in Coupa!
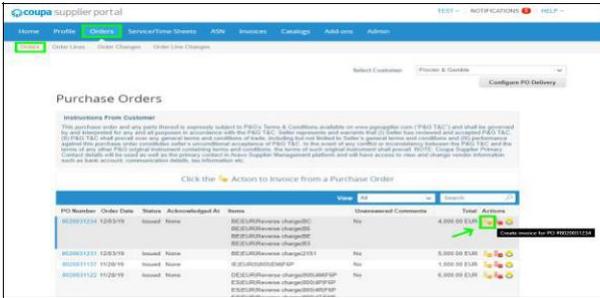
Please continue with the <u>next page</u> in order to find out more about the invoice creation process.

COUPA SUPPLIER PORTAL – E-INVOICING CONFIGURATION

STEP 2 - Create and submit an invoice

1. Go to the **Orders** tab, identify the **Purchase Order** that you want to create an invoice for, and click **Create Invoice** icon (yellow coin).

2. After clicking the **Create Invoice** button, a new page will be loaded where you will have to fill in the following fields:

2.1 Invoice Number – This is free of choice as can be seen above.

2.2 Date of Supply – This is filled in automatically with the date of invoice creation. If the date of supply differs from the date you are submitting the invoice, feel free to change it accordingly.

2.3 Currency – Select the transaction currency.

2.4 Supplier Note (optional) – Fill in any notes regarding the invoice.

2.5 Attachments (optional) – Here you can attach any supporting documents for your invoice. Please **do not** attach the invoice in PDF format, as Coupa creates a new invoice on your behalf, which you can download afterwards.

3. Moving further you will see the **Invoice Line(s)**. You will need to add the VAT rate on each of them (if you are invoicing multiple lines) and then press the **Calculate** button, followed by the **Submit** button.

Additional notes:

Please don't add the VAT rate for shipping if there is no shipping cost – leave it empty.

Never manually insert a blank line on the invoice if you have deleted a line by mistake.

More details regarding the partial invoicing process can be found on the next column.

4. Partial invoicing case scenarios.

4.1 Case 1: Invoicing certain lines from a Purchase Order with multiple lines.

Example: For a PO with 5 lines, if you want to invoice 2nd and 4th line, you will have to **delete** 1st, 3rd, and 5th line by hitting the red cross mark in the top-right corner of the PO line.

If you have accidentally deleted a line, please delete the invoice by scrolling down to the bottom and hitting the **Delete** button, and then proceed to create it again.

4.2 Case 2: Partially invoicing a services line (line without QTY).

Example: Let's assume you want to invoice 70% of the amount from the line below.

You calculate how much 70% represents and modify the price accordingly. Then you simply add the VAT rate and press the **Calculate** button at the bottom. The line will be updated immediately after.

4.3 Case 3: Partially invoicing a goods line (line with QTY).

For QTY lines the same logic as above applies, but you will modify the QTY field instead, since the QTY is what determines the price.

Example: For a line with QTY 10 and Price €20 (Total €200), if you want to invoice €140 you will modify the QTY to reflect that amount, which in this case would be 7.

5. Additional details:

5.1 In order to avoid invoice duplication, please do not send another copy of the invoice via e-mail PDF or post after you have submitted it through Coupa.

In case you have sent the invoice via e-mail PDF or post before, do not send it again via Coupa – use Coupa only for the invoices issued afterwards.

5.2 If the tax code "Reverse Charge" is needed, please use **Reverse Charge** on the **VAT Rate** field, and by doing so, the field **Tax Reference** must be completed as well. You can simply add the text "Reverse Charge" in the **Tax Reference**.

For Belgium only: It is mandatory to add "**BTW verlegd**" on the **Tax Reference** field if the **Reverse Charge** is used.

For United Kingdom only: If you do not have a **VAT ID** and use a local one, please make sure you select **Exempt VAT rate** when submitting invoices.

6. Once you have made all the modifications required and clicked the **Submit** button, you will see the following confirmation box.

After submitting the invoice, you will be redirected to the **Invoices** tab in Coupa, where all your invoices will be shown.

There you will be able to track the current status of your invoice and download a legally compliant copy by opening the invoice and clicking the **Download** link.

Please archive the Coupa invoices (you can download all legal documents in a ZIP archive from Export in Invoices tab) latest 60 days after creation, as Coupa deletes all attachments after 60 days from submission.

7. If you need to send a Full **Credit Note/ Partial Credit Note/ Rebate Credit Note** please consult one of the Job Aid below:

Coupa Full Credit Note - Job Aid EN.pd

Coupa Partial Credit Note - Job Aid

Coupa Rebate Credit Note.pdf

COUPA SUPPLIER PORTAL – E-INVOICING CONFIGURATION

Congratulations!

You have learned how to correctly submit an invoice for Procter & Gamble via Coupa Supplier Portal.

If you wish to change the language of the Coupa Supplier Portal, it can be easily done from the Home page from the option located on the bottom of the page.