



Coupa Supplier Training

Updating Supplier Banking in the Coupa Supplier Portal

Updating Supplier Banking in the Coupa Supplier Portal (CSP)

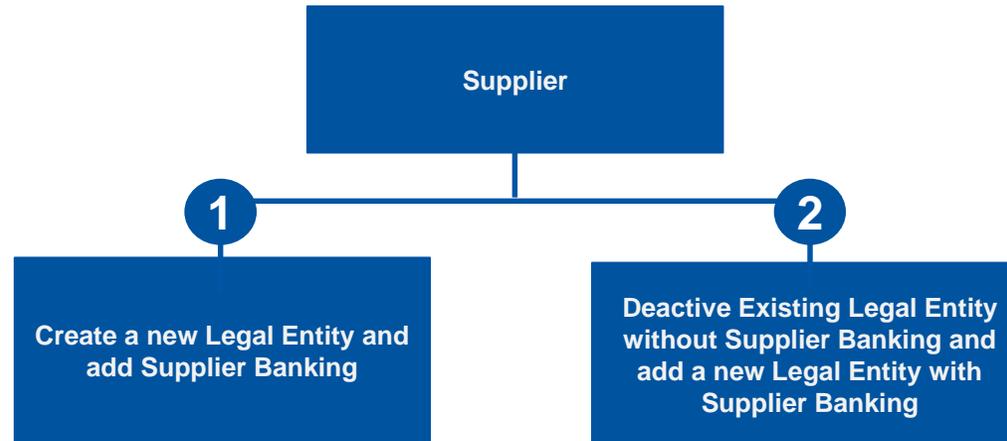
- Supplier Banking Information needed in the Coupa Supplier Portal
 - As we work to continuously improve our procurement process, we will be implementing updates to expand our usage of Coupa to our other global locations. In addition, to help streamline Cooper Standard's Procure to Pay operations we are asking that all Cooper Standard suppliers enter their banking information in the CSP
 - After the Supplier Banking Update is complete, starting August 19th 2019 invoices must be submitted from a legal entity that contains supplier banking information.

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How do I update my bank account information in the CSP?

- There are two methods to update Supplier Banking information on the Coupa Supplier Portal (CSP)



*Creating a new Legal Entity with Supplier
Banking Information*

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Create a new Legal Entity and add Supplier Banking

1. Select the “Admin” tab
2. Select “E-Invoicing” Setup
3. Select “Add Legal Entity”

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the 'coupa supplier portal' logo on the left, and user information 'MICHAEL' with a dropdown arrow, 'NOTIFICATIONS' with a red circle containing '0', and 'HELP' with a dropdown arrow on the right. Below the header is a blue navigation bar with tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' tab is highlighted with a red box. Below the navigation bar, the page title is 'Admin E-Invoicing Setup'. On the left side, there is a sidebar menu with options: 'Users', 'Merge Requests', 'E-Invoicing Setup' (highlighted with a red box), 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Coupa Accelerate', and 'Preferences'. On the right side, there is a grey bar labeled 'Legal Entity' with an 'Add Legal Entity' button highlighted by a red box.

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Create a new Legal Entity and add Supplier Banking

4. Enter "Legal Entity Name"
5. Select "Country"
6. Select "Continue"

Where's your business located?

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

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



Create a new Legal Entity and add Supplier Banking

7. Complete the “Required” for Invoicing section

- Leave the Remit-to and Ship-from Address checked. Your remit-to address and ship-from address are stored in our ERP system

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country United States

Use this address for Remit-To 

Use this for Ship From address 

REQUIRED FOR INVOICING

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

Create a new Legal Entity and add Supplier Banking

8. Complete the “Banking Information” based on the banking requirements for your Bank Account Country

9. Complete the “Bank Address” section

- Supplier Banking Information and Bank Address is mandatory for Cooper Standard to facilitate the Procure to Pay process

Banking information i

Bank Account Country: United States v

Bank Account Currency: v

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Routing Numt v

Account Number: i

Account Number Confirm:

IBAN: i

SWIFT/BIC Code: i

Bank Account Type: Business v

RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations). i

Bank address

Address Line 1:

Address Line 2:

City:

State: Select an Option v

Postal Code:



Create a new Legal Entity and add Supplier Banking

10. Complete the “Tax Registration” section (if required by Coupa based on the Tax Country for your location)

What is your Tax ID? 

Country 



Tax ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Create a new Legal Entity and add Supplier Banking

11. Select “Done”
12. Your Setup is Complete
13. Select “Return to Admin”

Miscellaneous

Invoice From Code ⓘ

Preferred Language

Setup Complete ×



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.

Coupa Supplier Training



Create a new Legal Entity and add Supplier Banking

14. To make sure you are submitting your invoice from a legal entity and “remit-to” address that has supplier banking provided. You will be able to view your banking information on the invoice.

[Configu](#)

Create Invoice Create

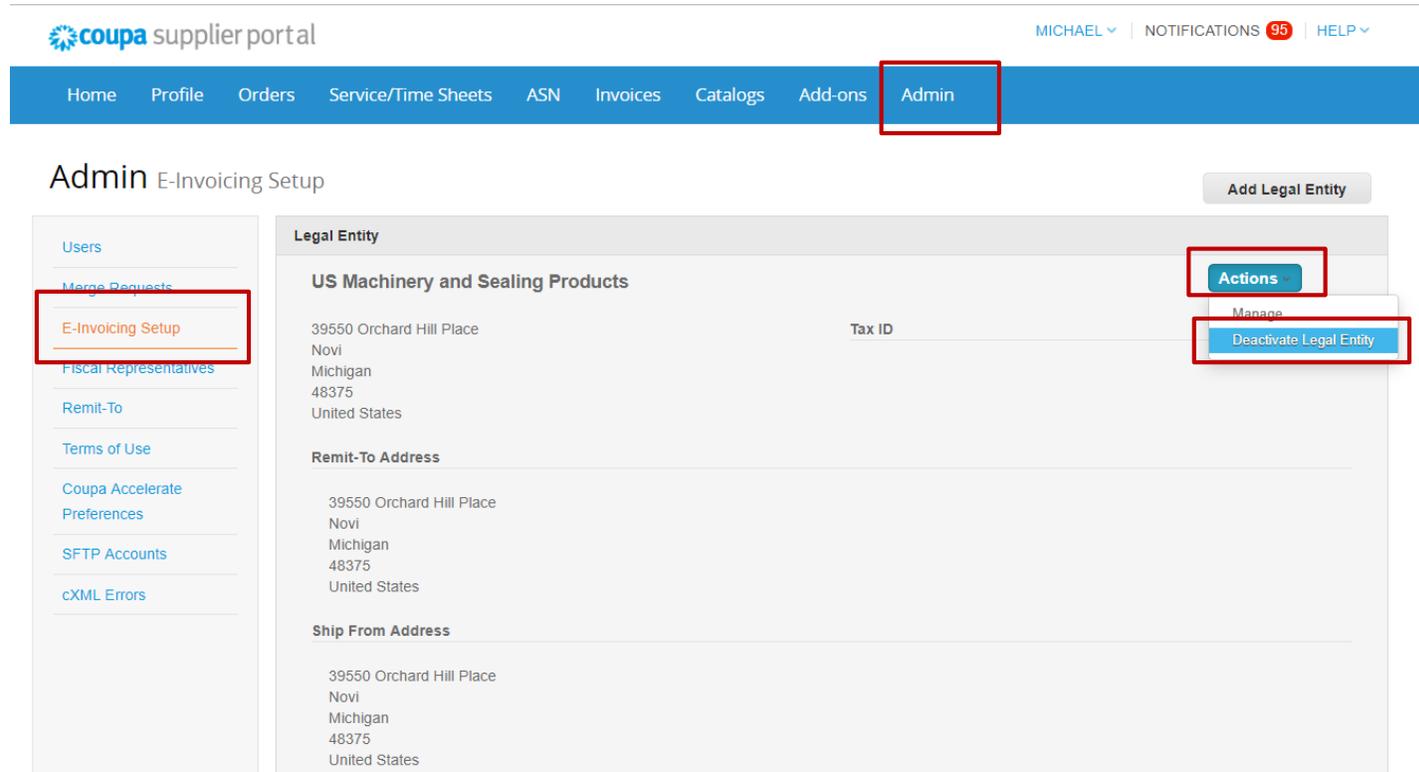
General Info	From
<p>* Invoice # <input type="text"/></p> <p>* Invoice Date 08/06/19 </p> <p>Payment Term N060</p> <p>* Currency USD </p> <p>Delivery Number <input type="text"/></p> <p>Status Draft</p> <p>Image Scan <input type="button" value="Choose File"/> No file chosen</p> <p>Supplier Note <input type="text"/></p> <p>Attachments Add File URL Text</p>	<p>* Supplier US Machinery and Sealing Products</p> <p>Supplier Tax ID None</p> <p>* Invoice From Address US Machinery and Sealing Products 39550 Orchard Hill Place Novi, Michigan 48375 United States</p> <p>* Remit-To Address US Machinery and Sealing Products 39550 Orchard Hill Place Novi, Michigan 48375 United States</p> <div style="border: 2px solid red; padding: 5px;"><p>Bank Name: Bank of America</p><p>Bank Account Number: *****9999</p><p>Routing Number: 999999999</p></div> <p>* Ship From Address US Machinery and Sealing Products 39550 Orchard Hill Place Novi, Michigan 48375 United States</p>

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*Deactive Existing Legal Entity without Supplier Banking and add a new
Legal Entity with Supplier Banking*

Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

- Deactivate Existing Legal Entity without Supplier Banking Information
 1. Select the “Admin” tab
 2. Select “E-Invoicing” Setup
 - Find the Legal Entity without Banking Information to Deactive
 - If you do not know if the Legal Entity has banking information you can view this information in the “Remit-to” section of the Admin table
 3. Select “Actions”
 4. Select “Deactivate Legal Entity”



The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Admin' tab is highlighted in the navigation bar. The left sidebar contains a list of menu items, with 'E-Invoicing Setup' highlighted. The main content area displays the 'Legal Entity' section for 'US Machinery and Sealing Products'. The 'Actions' menu is open, and 'Deactivate Legal Entity' is highlighted. The page also shows the 'Remit-To Address' and 'Ship From Address' sections for the legal entity.

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Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

- Add a New Legal Entity with Supplier Banking Information
 1. Select “E-Invoicing” Setup
 2. Select “Add Legal Entity”

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal' text, along with user information 'MICHAEL', a notification bell icon with '0', and a 'HELP' dropdown. Below the header is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is titled 'Admin E-Invoicing Setup'. On the left, a sidebar menu lists various options: Users, Merge Requests, E-Invoicing Setup (highlighted with a red box), Fiscal Representatives, Remit-To, Terms of Use, Coupa Accelerate, and Preferences. On the right, the main content area is titled 'Legal Entity' and features a prominent 'Add Legal Entity' button, also highlighted with a red box.



Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

3. Enter "Legal Entity Name"
4. Select "Country"
5. Select "Continue"

Where's your business located?

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* Legal Entity Name

Country

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

Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

6. Complete the “Required” for Invoicing section

- Leave the Remit-to and Ship-from Address checked. Your remit-to address and ship-from address are stored in our ERP system

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country United States

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

REQUIRED FOR INVOICING

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

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7. Complete the “Banking Information” based on the banking requirements for your Bank Account Country

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Bank Account Country: United States v

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Address Line 1:

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Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

9. Complete the “Tax Registration” section (if required by Coupa based on the Tax Country for your location)

What is your Tax ID? 

Country 



Tax ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking

10. Select “Done”
11. Your Setup is Complete
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