Coupa Supplier Training

Updating Supplier Banking in the Coupa Supplier Portal

Coupa Supplier Training

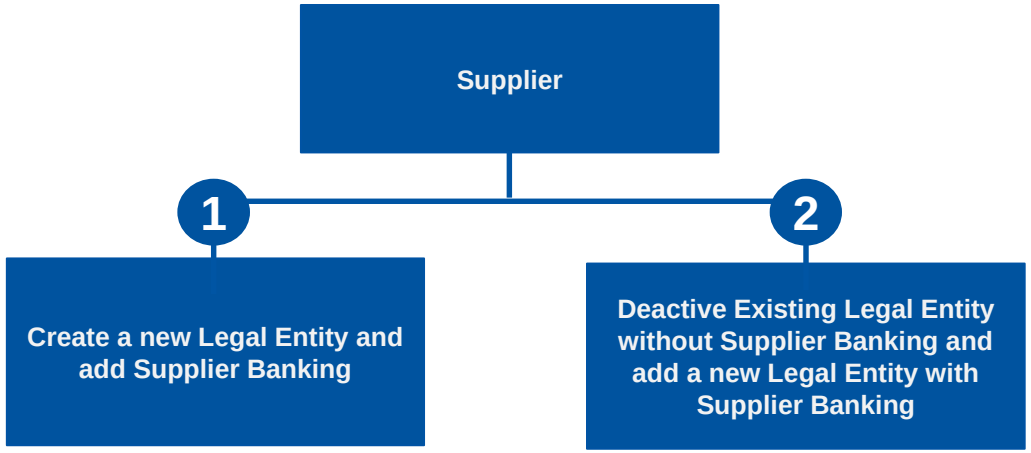
Updating Supplier Banking in the Coupa Supplier Portal (CSP)

- 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.

Coupa Supplier Training

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)

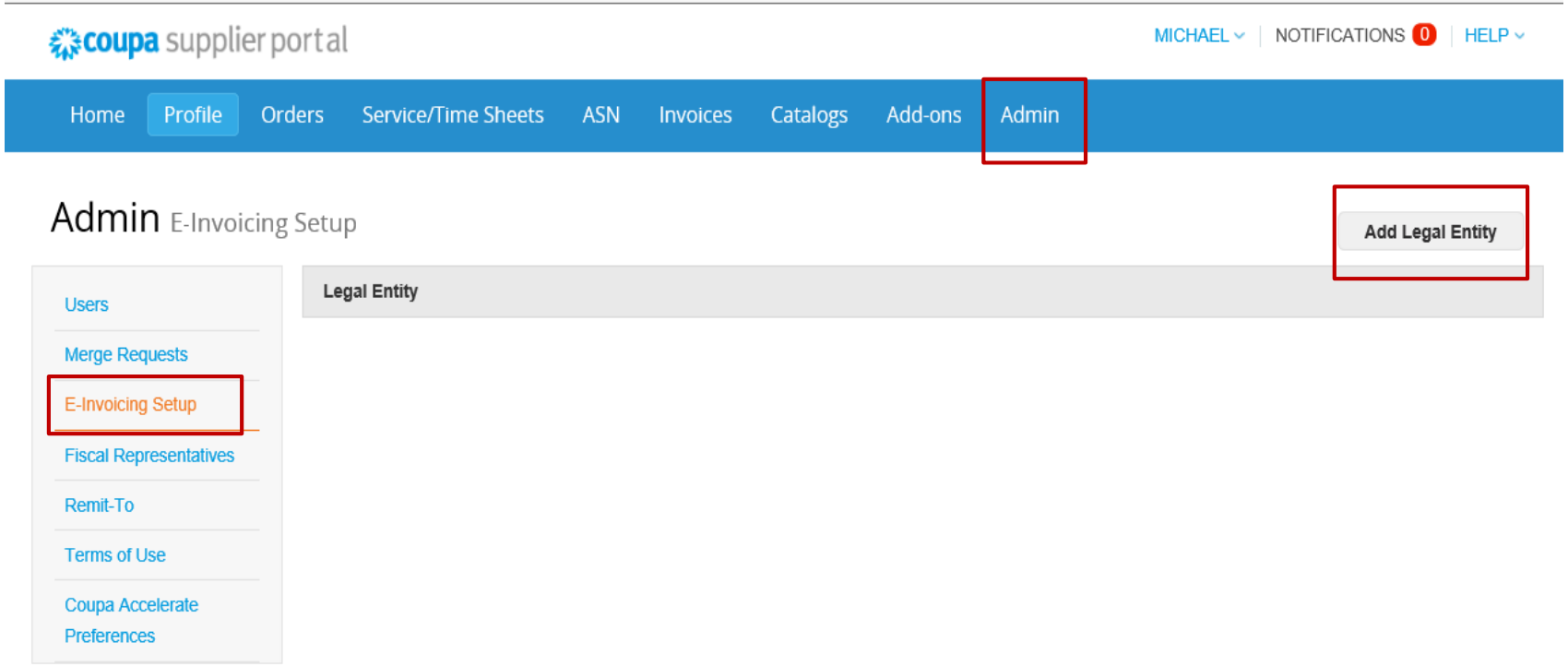


Creating a new Legal Entity with Supplier Banking Information

Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

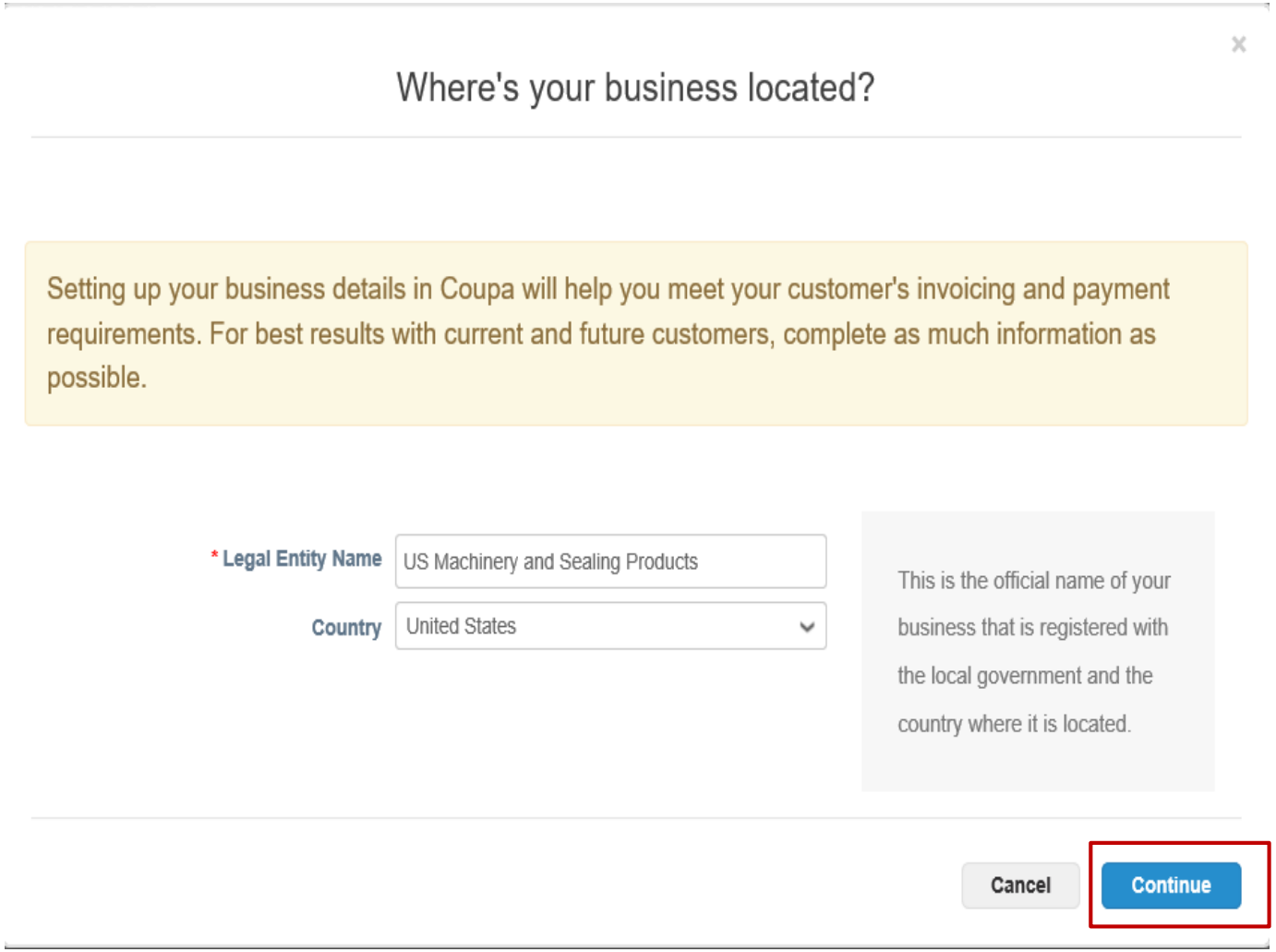
1. Select the “Admin” tab
2. Select “E-Invoicing” Setup
3. Select “Add Legal Entity”



Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

4. Enter “Legal Entity Name”
5. Select “Country”
6. Select “Continue”

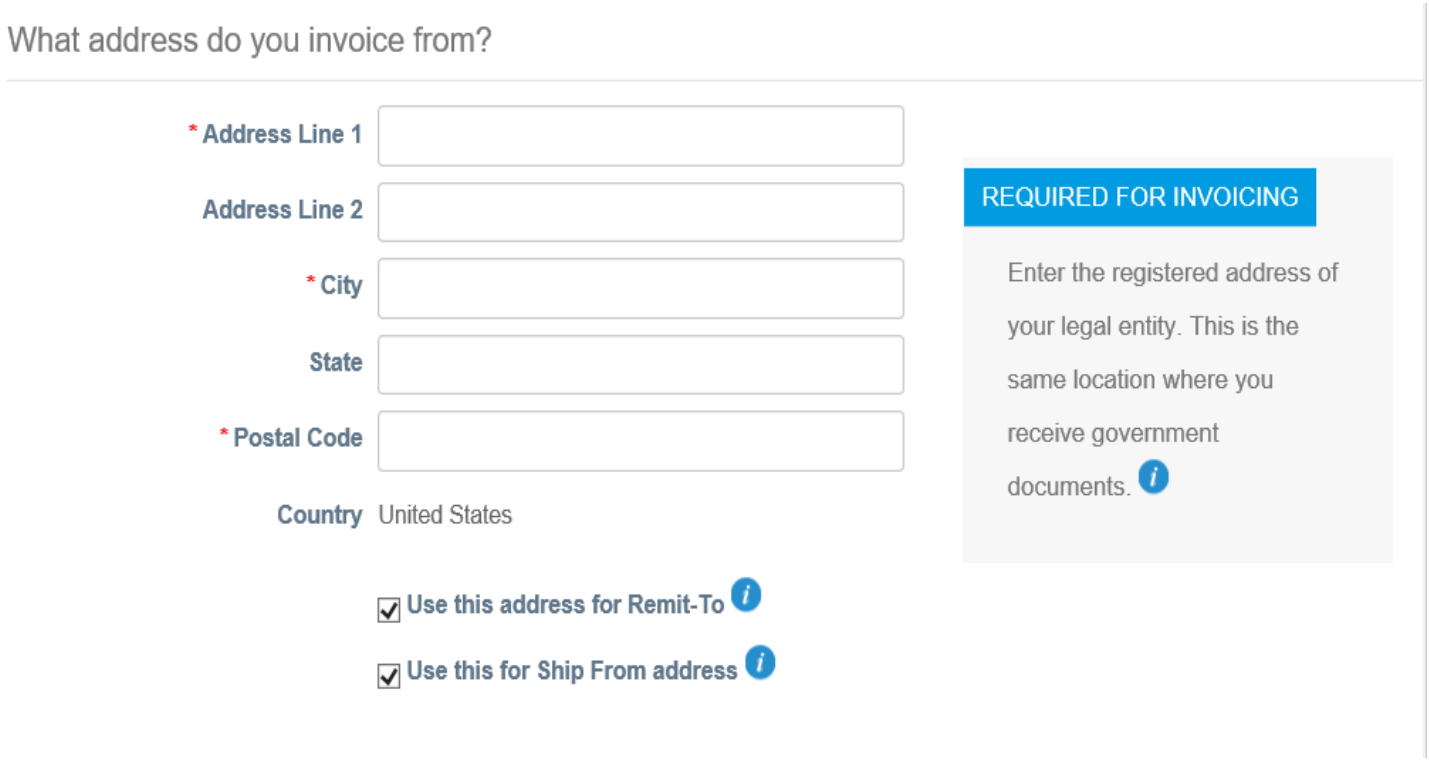


Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

7. Complete the “Required” for Invoicing section

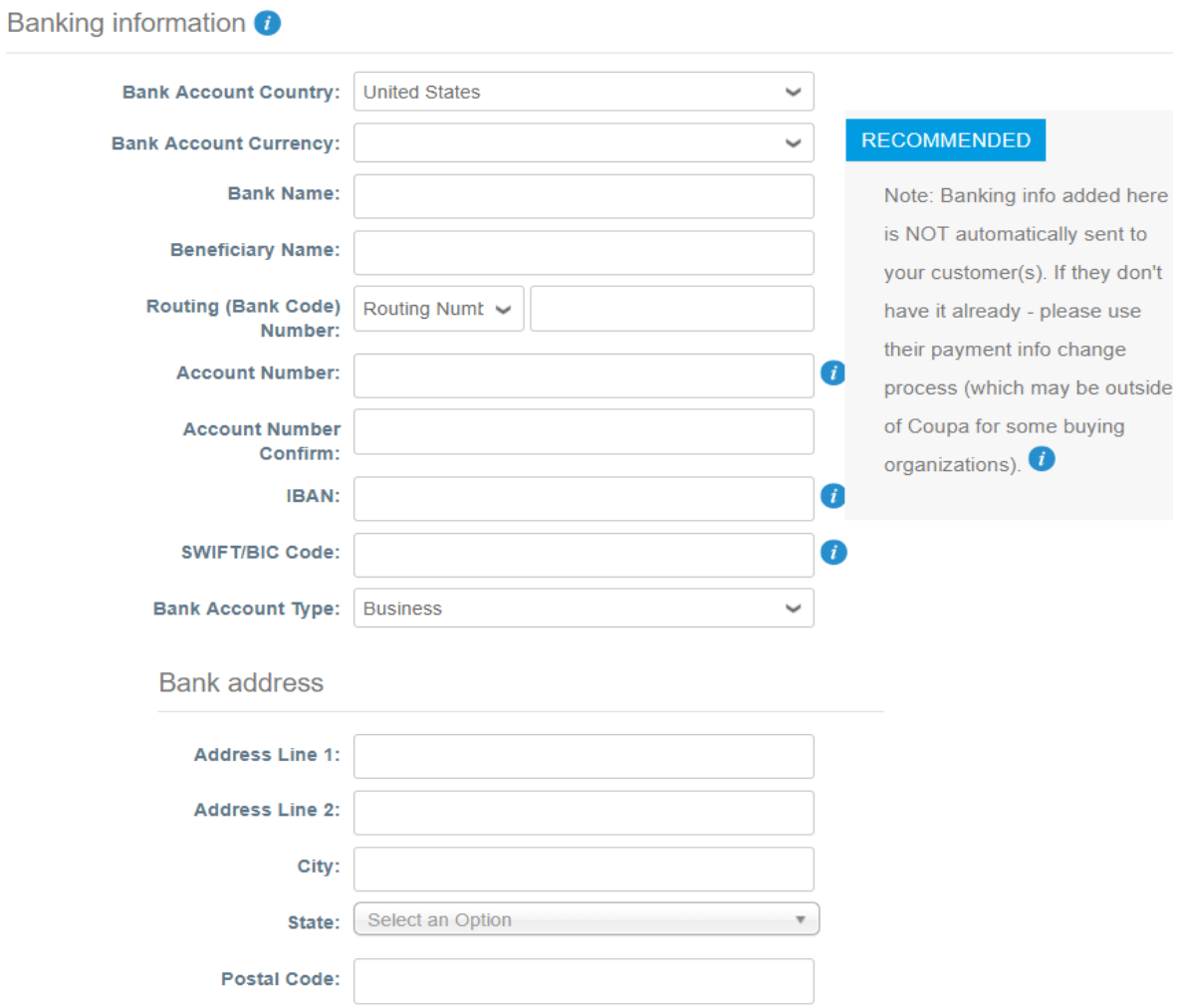
- Leave the Remit-to and Ship-from Address checked. Your remit-to address and ship-from address are stored in our ERP system



Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

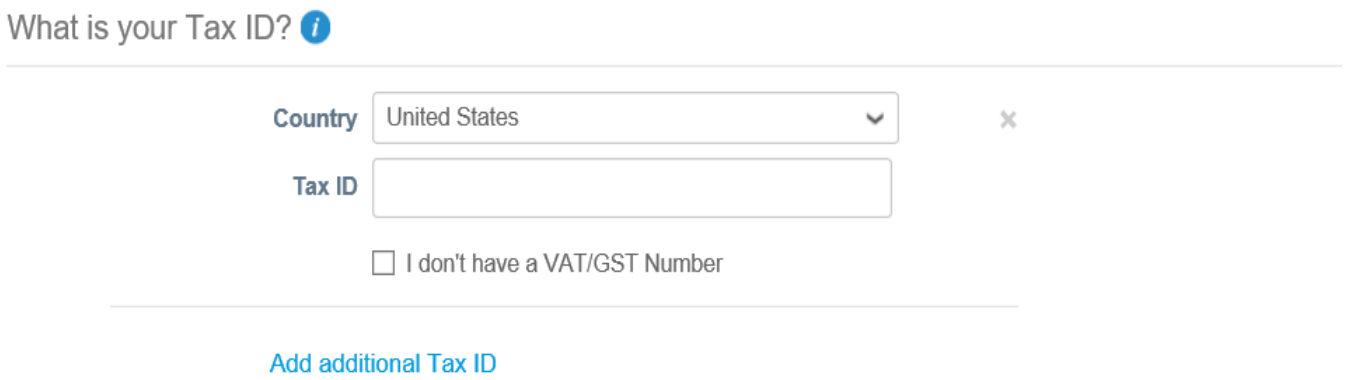
8. Complete the “Banking Information” based on the banking requirements for your Bank Account Country
9. Complete the “Bank Address” section
    - Supplier Banking Information and Bank Address is mandatory for Cooper Standard to facilitate the Procure to Pay process



Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

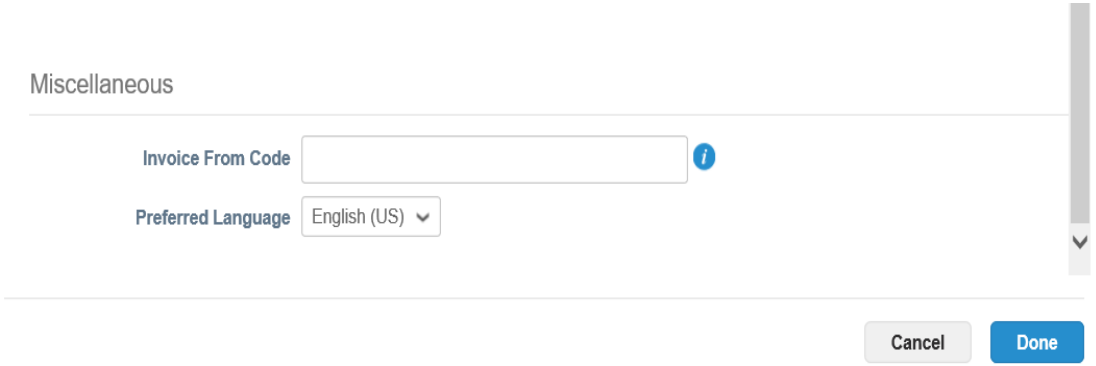
10. Complete the “Tax Registration” section (if required by Coupa based on the Tax Country for your location)

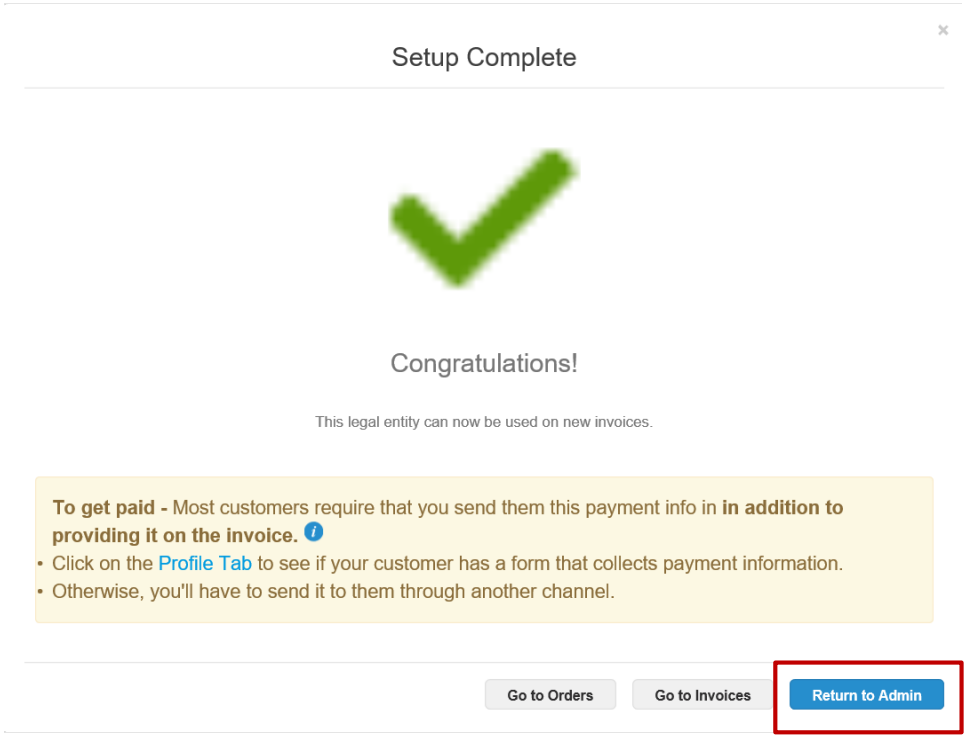


Coupa Supplier Training

Create a new Legal Entity and add Supplier Banking

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

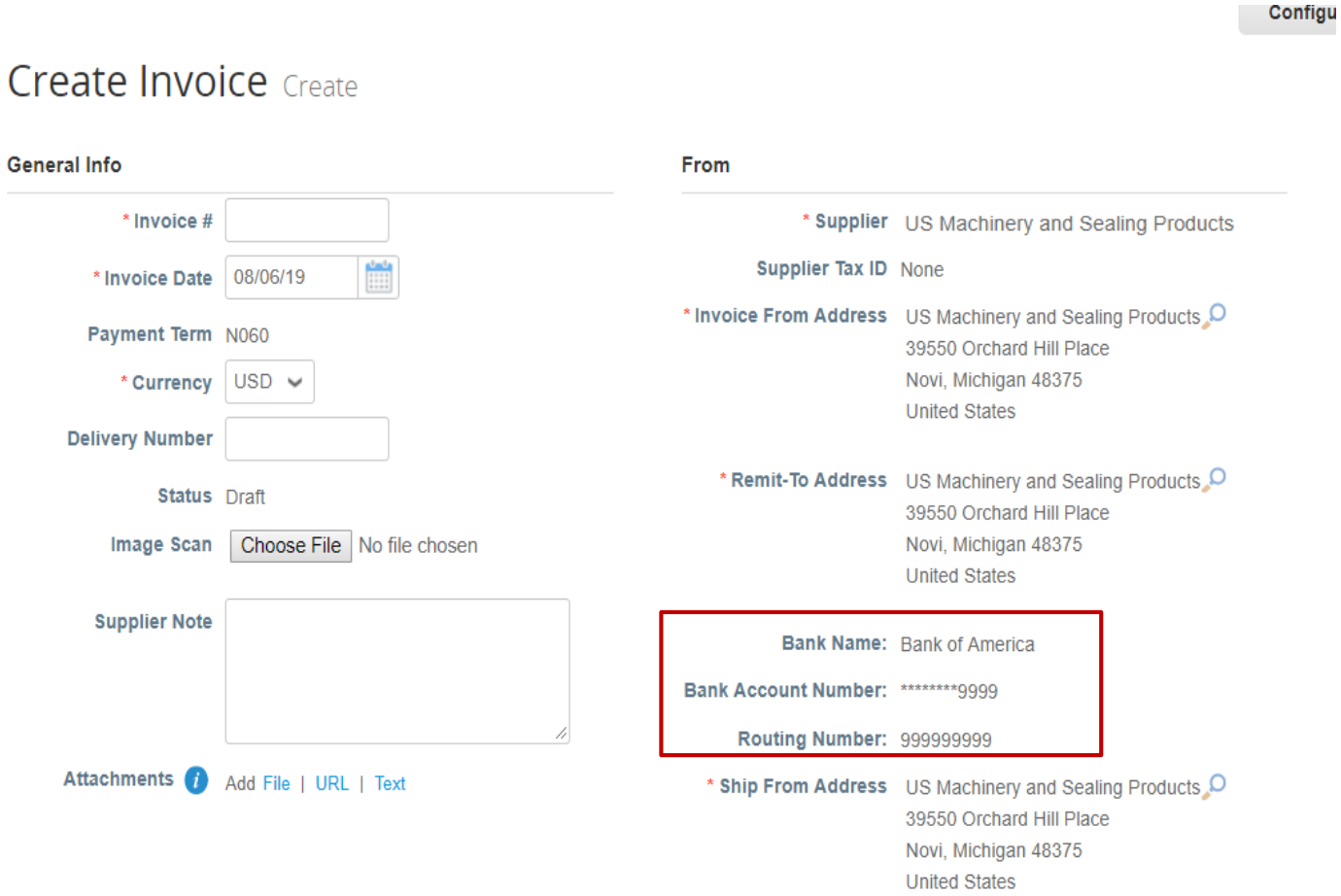




Coupa Supplier Training

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.

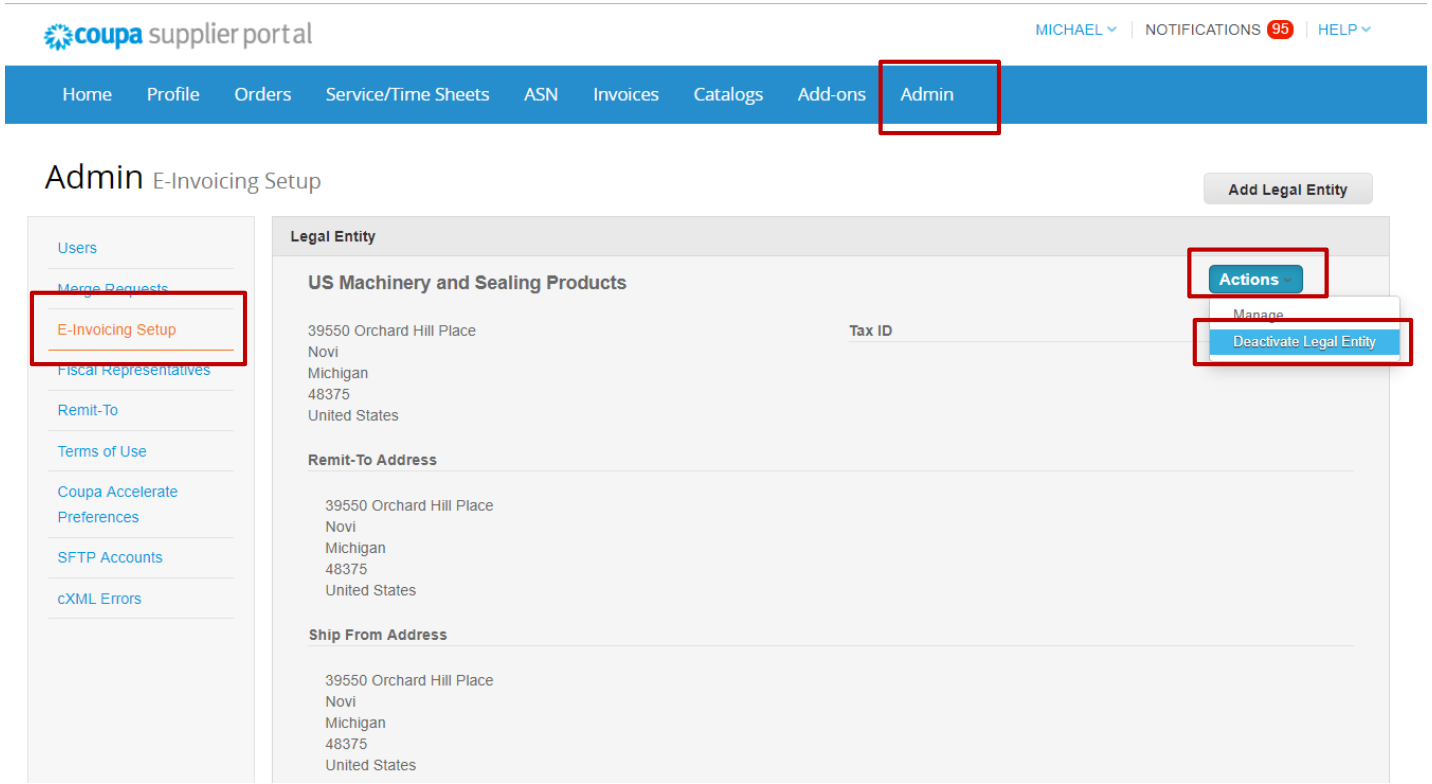


2 *Deactive Existing Legal Entity without Supplier Banking and add a new Legal Entity with Supplier Banking*

Coupa Supplier Training

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”



Coupa Supplier Training

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
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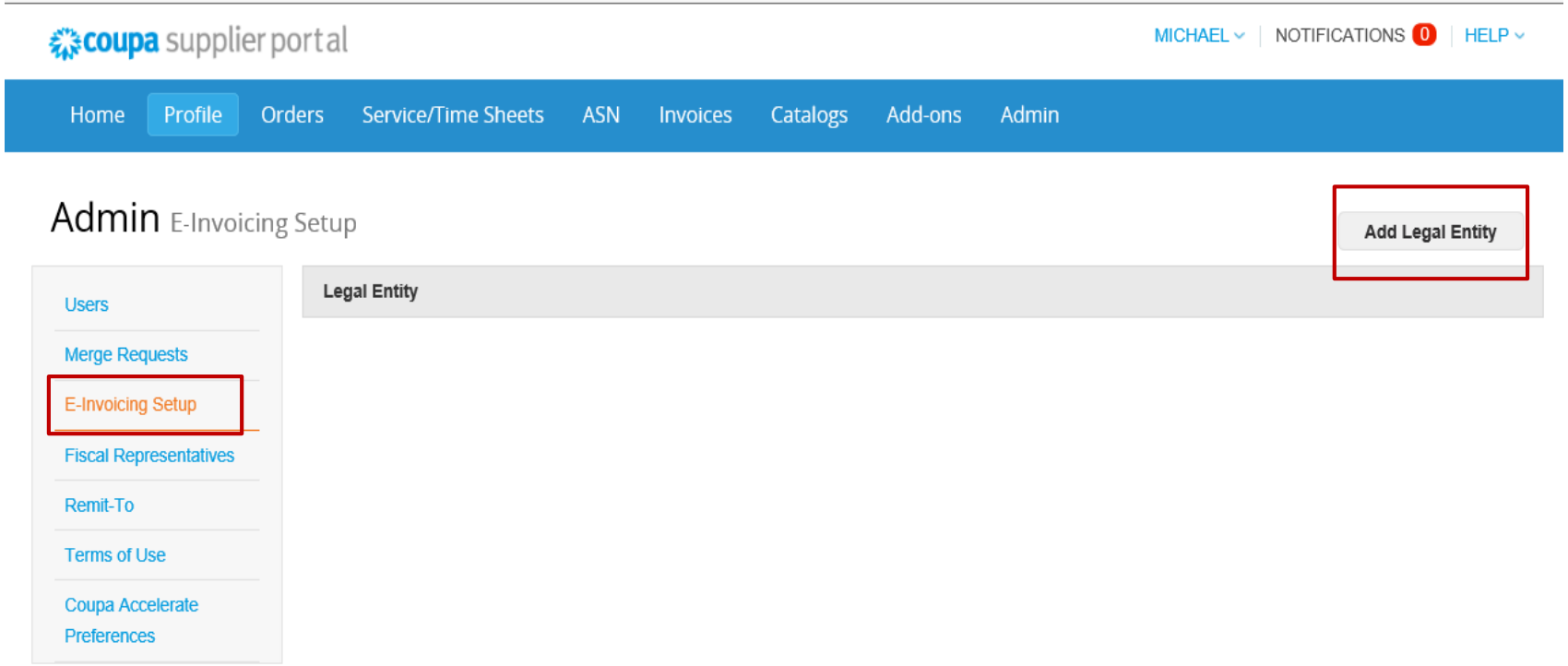
  2. Select “Add Legal Entity”



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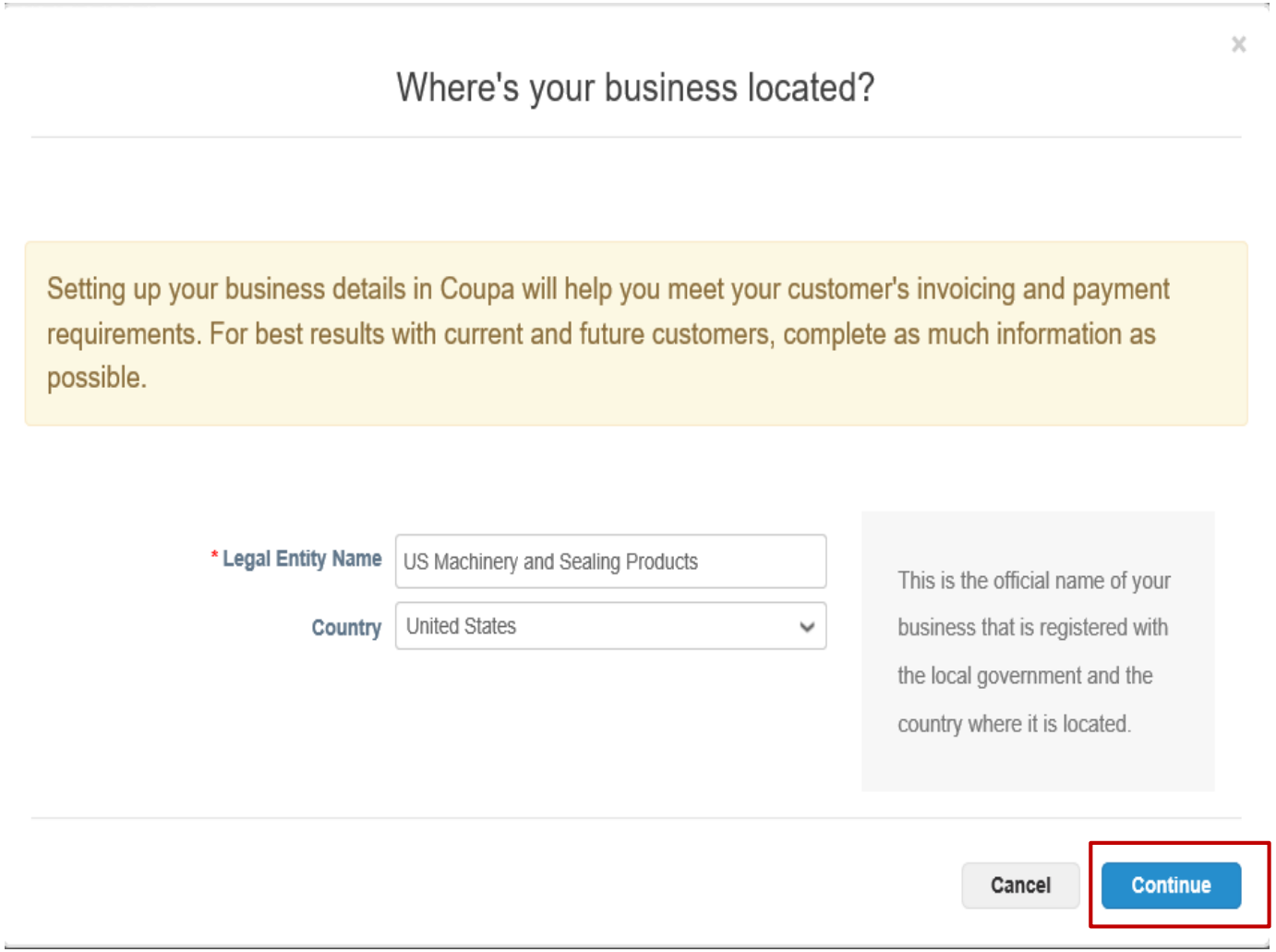

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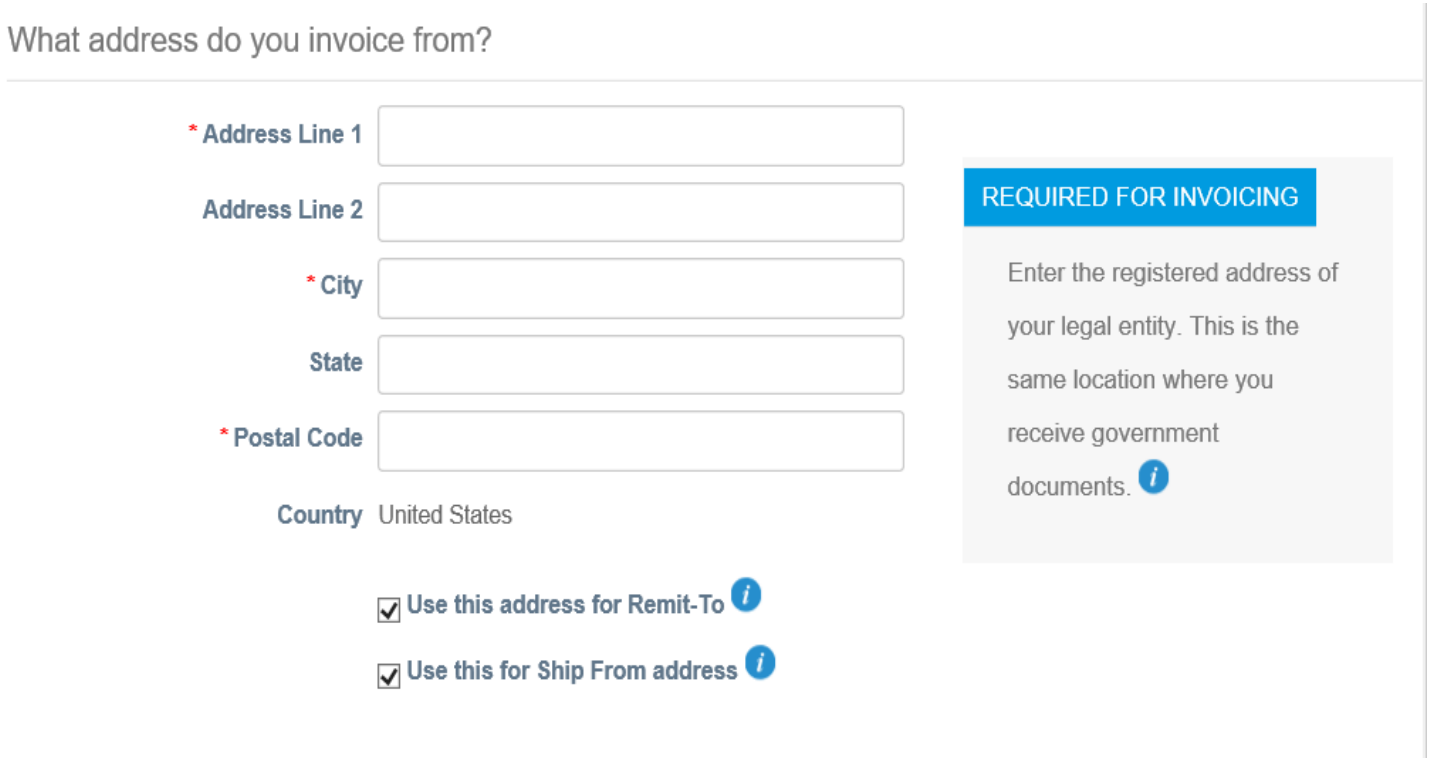

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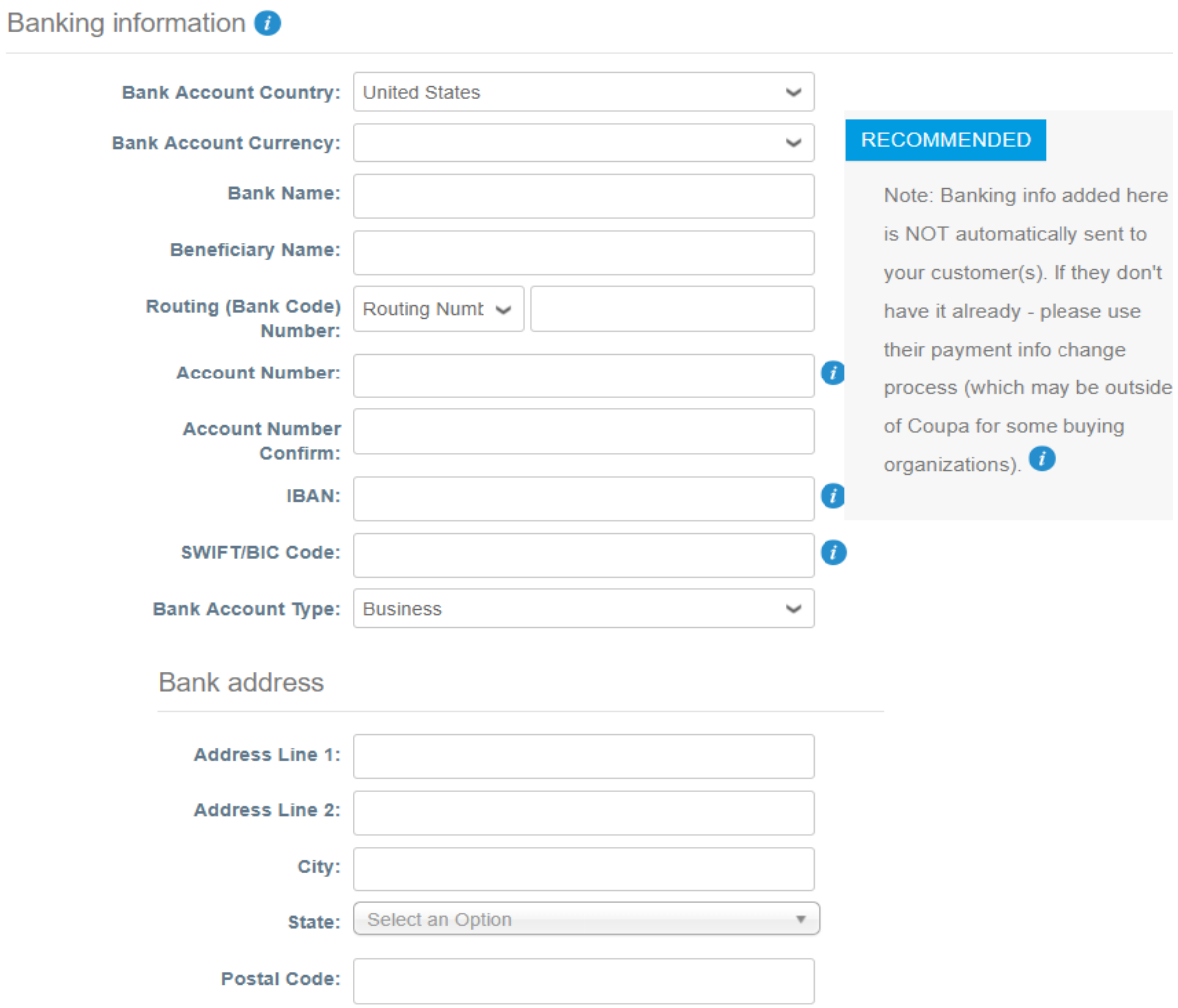

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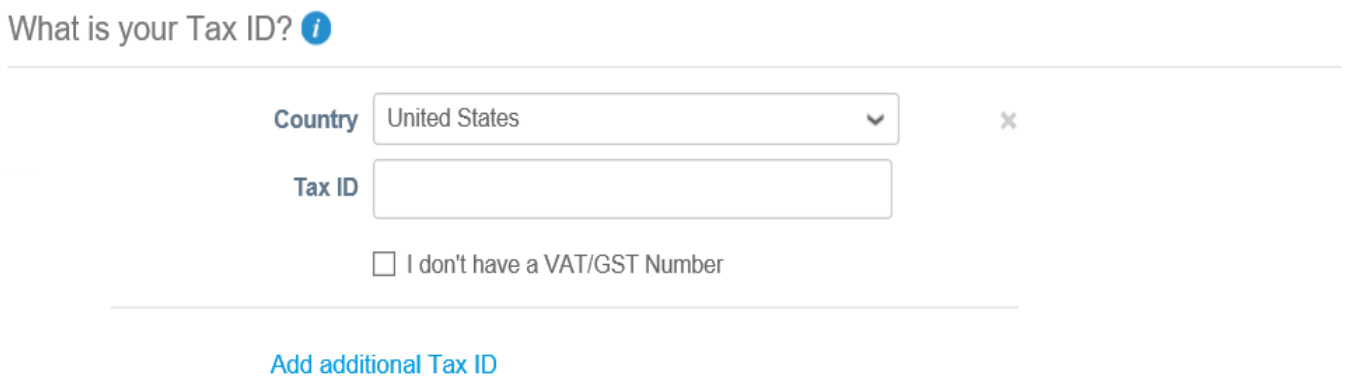

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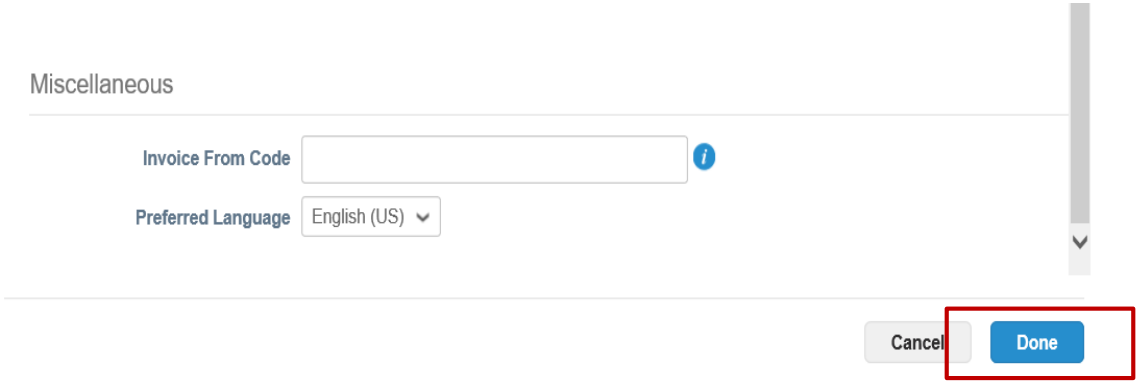

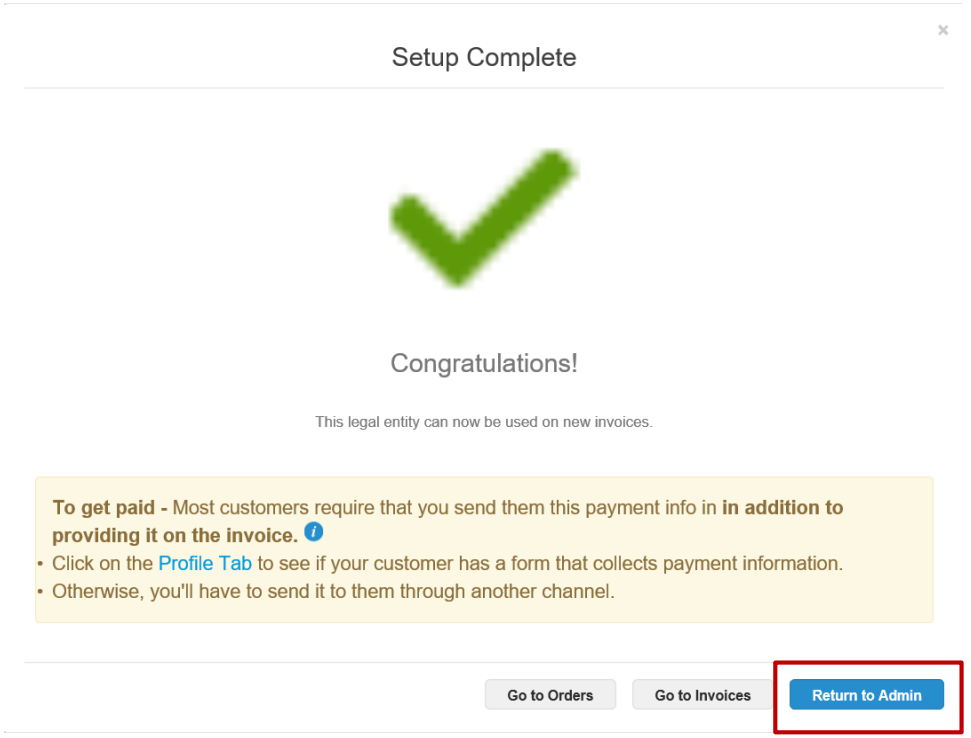

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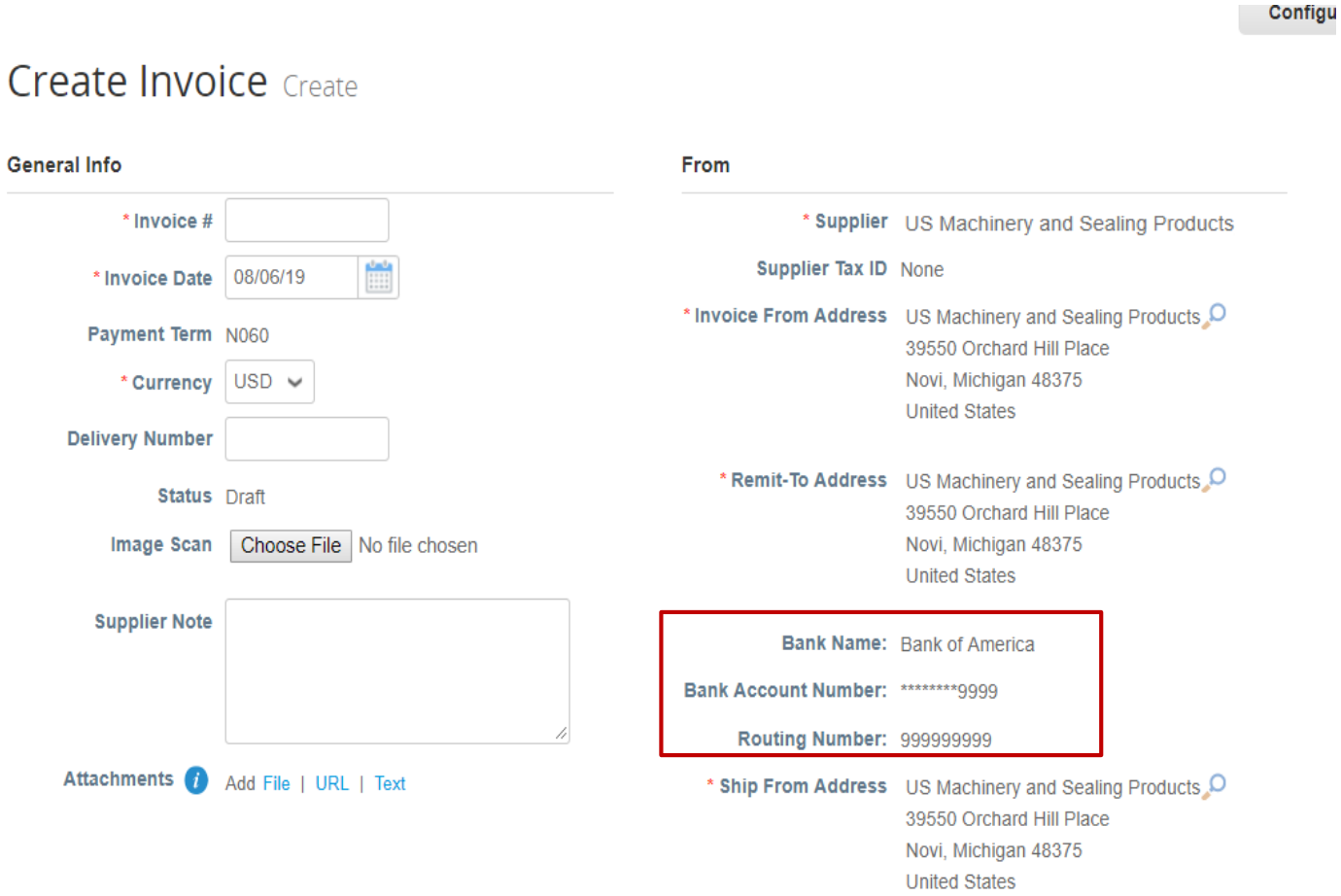
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