



## Add a legal entity

### Note

If you enabled two-factor authentication for financial data, the CSP prompts you to authenticate. For more information, see [Manage Multi-Factor Authentication](#).

1. Log in to CSP <https://supplier.coupahost.com/sessions/new>
2. Go to **Setup > Admin > Legal Entity Setup** and select **Add Legal Entity** in the top right corner.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Setup' button in the navigation bar is highlighted with a red box. Below the navigation bar, the 'Admin' menu is highlighted with a red box, and the 'Legal Entity Setup' option is also highlighted with a red box. In the top right corner of the main content area, the 'Add Legal Entity' button is highlighted with a red box.

3. Enter the official name of your business that is registered with the local government and select the country/region where it is located and select **Continue**.

The screenshot shows a form titled "Where's your business located?". Below the title is a yellow informational box with the text: "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." Below this box are two required fields: "\* Legal Entity Name" and "\* Country/Region". The "Continue" button is highlighted with a red box.

4. On the **Tell your customers about your organization** page, complete the mandatory (\*) fields. If same address will be used as Remit-To and Ship-From address, click the two boxes below.

### Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

What address do you invoice from?

\* Address Line 1  +

\* City

State

\* Postal Code

Country/Region

Use this address for Remit-To *i*

Use this for Ship From address *i*

What is your Tax ID? *i*

Country/Region  x

\* VAT ID

I don't have a VAT/GST Number

**REQUIRED FOR INVOICING**  
Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

5. If you're planning to use CXML as your invoice submission channel, input code in "Input From Code" box. This can be any format of your preference, e.g. RTC-8020. Select **Save and Continue**

### Miscellaneous

Invoice From Code  *i*

Preferred Language

6. On the **Where do you want to receive payment?** page, select **Save and Continue**. For P&G, your Payment information must be set in Aravo (<https://pg.aravo.com/aems/login.do>).

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 C JOSEP PLA 163  
City BARCELONA  
Postal Code 08020  
Country/Region Spain

Cancel Save & Continue

7. The following screen summarizes your remit-to account details. You can select **Add Remit-To** to add an additional remit-to address or you can select **Manage** next to an existing remit-to to edit it. Once you are finished making changes, select **Next**.

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	C JOSEP PLA 163 BARCELONA 08020 Spain	Active

Manage

Deactivate Legal Entity Cancel Next

8. On the **Where do you ship goods from?** page, add an additional ship-from address if different from the one you entered in step 4. Once you are finished making changes, select **Done**.

### Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
C JOSEP PLA 163 BARCELONA 08020 Spain	Active	Manage

Deactivate Legal Entity Done


#### Note

If you enabled the **Use this for Ship From** address option in step 4, the address is already populated. You can select **Add Ship From** to add an additional ship from address, or you can select **Manage** next to an existing ship from address to edit it.

9. The **Setup Complete** page confirms that your legal entity setup is complete and that you can use it on invoices. Select whether you'd like to go to **Orders**, **Invoices**, or **Return to Admin** or select **Done** to return to the **Legal Entities** page.

### Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

Once you are invited to do business on the Coupa Supplier Portal by your customer(s), this information will be available for you to share with them and use on invoices. Request an invitation from your customer(s) today to start transacting.

Go to Orders Go to Invoices Return to Admin Done

# Modify legal entities

1. Go to **Setup > Admin > Legal Entity Setup**.
2. Next to the legal entity you want to modify, select **Actions**.
3. You can select **Manage Legal Entity**, **Manage Remit-To Accounts**, and **Deactivate Legal Entity**.

Option	Description
Manage Legal Entity	Opens the legal entity setup flow described in section <i>Add a Legal Entity</i> above. You can manage your addresses, but other information is not editable. Create a new legal entity if you need to modify more information.
Manage Remit-To Accounts	Opens the <b>Add a new Remit-To account</b> window where you can manage existing remit-to accounts or add new remit-to accounts. For more information, see <a href="#">View and Manage Remit-to Information</a> .  Note  You can also manage your remit-to information from the <b>Setup &gt; Admin &gt; Remit-To</b> page.
Deactivate Legal Entity	Deactivates the legal entity so that it can't be used by you or your Coupa customer.  Warning  This action can't be undone. Check with your customer first to ensure that you don't have any interruption in invoicing.