



# Coupa Supplier Portal (CSP) Setting Up Your Account

October 2023

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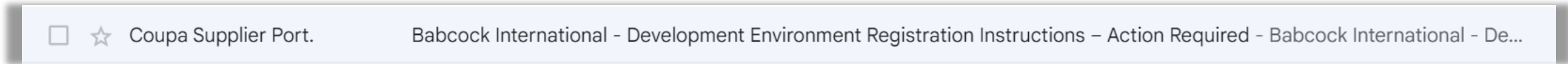
A large submarine is shown on the water, with several crew members in red and yellow gear on deck. The submarine is dark and has two large horizontal pipes extending from its sides. In the background, there are large, rugged mountains with patches of snow under a clear blue sky. The water is a deep blue with some white foam from the submarine's movement.

# Registering for the Coupa Supplier Portal (CSP)

# CSP Registration (1/2)

## Coupa Supplier Portal Registration:

- You will be receiving a Coupa Supplier Portal (CSP) invite from Babcock via email



- Within the email you will be asked to **“Join Coupa”** for the CSP
- You will then be redirected to the CSP website where you will be asked to fill certain credentials
- These include **“Business name” “Password”** before clicking **“Create an Account”**

**babcock™** Babcock International - Development Environment Registration Instructions – Action Required

Powered by **coupa**

Hello Babcock Supplier

We handle our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.

Foivos Zografos  
Babcock International - Development Environment

**Join Coupa** Forward this invitation



**Create an Account**

Babcock International - Development Environment is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Babcock International - Development Environment so you're ready to do business together.

\* Business Name  
Babcock Supplier

\* Email  
babcocksupplier@gmail.com

\* First Name  
Babcock

\* Last Name  
Supplier

\* Password  
\* Confirm Password

I accept the [Privacy Policy](#) and the [Terms of Use](#)

**Create an Account**

Already have an account? [LOG IN](#)

[Forward this to someone](#)

# CSP Registration (2/2)

- Alternatively, if you do have an account click **“LOG IN”**
- In this case, fill in the following information as displayed on the right. This includes, **“Email”**, and **“Password”**

**Create an Account**

Babcock International - Development Environment is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Babcock International - Development Environment so you're ready to do business together.

\* Business Name  
Babcock Supplier  
Your legal business name (or legal personal name if an individual)

\* Email  
babcocksupplier@gmail.com

\* First Name  
Babcock

\* Last Name  
Supplier

\* Password  
Use at least 8 characters and include a number and a letter.

\* Confirm Password

I accept the [Privacy Policy](#) and the [Terms of Use](#)

[Create an Account](#)

[Already have an account? LOG IN](#)

[Forward this to someone](#)



**Login**

\* Email

\* Password

[Forgot your password?](#)

[Login](#)

New to Coupa? [CREATE AN ACCOUNT](#)



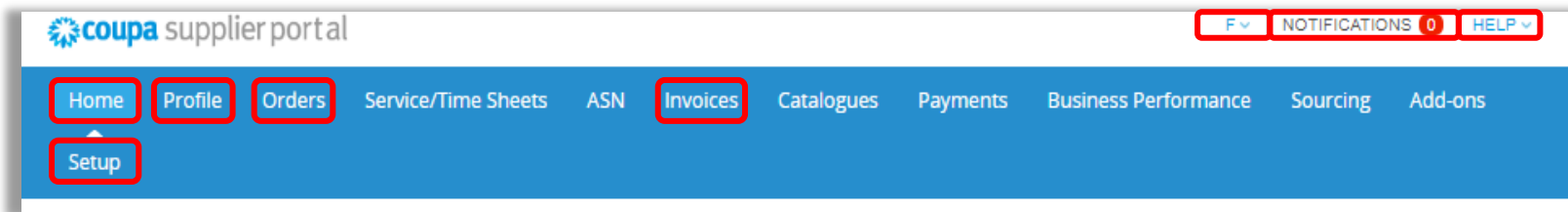


# Navigating the CSP

# Navigating the CSP: Homepage Overview (1/2)

## Description:

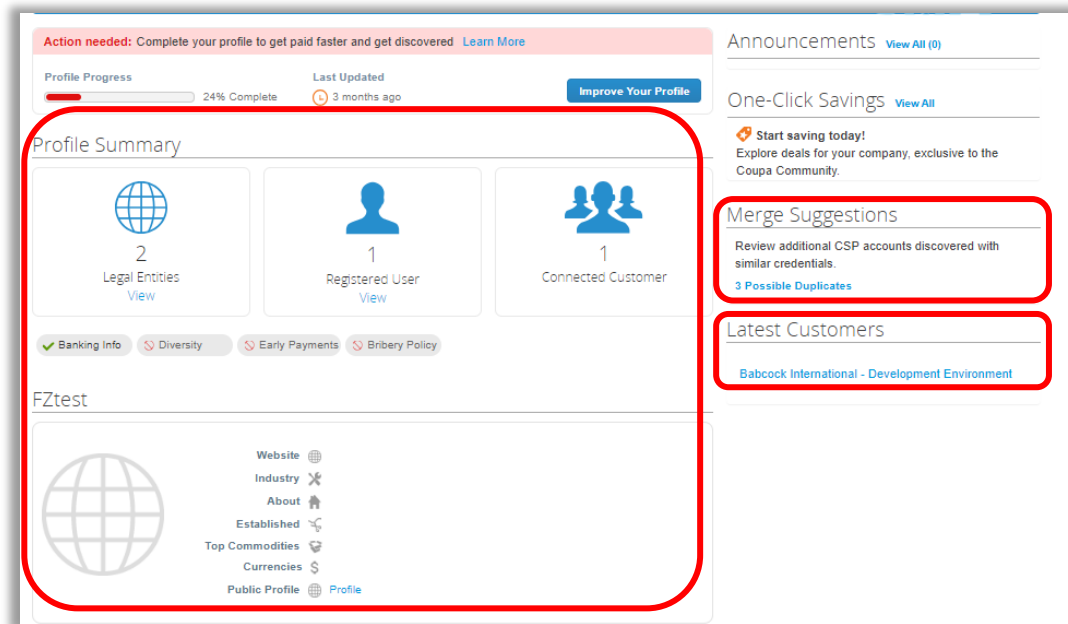
- **“Account”**: the user’s account name with a drop down menu to manage CSP account
- **“Notifications”**: allows suppliers to view and manage notifications and notification preferences
- **“Help”**: access the CSP help menu
- **“Home”**: CSP homepage
- **“Profile”**: allows suppliers to manage profile information
- **“Orders”**: allows suppliers access and manage Purchase Orders
- **“Invoices”**: allows suppliers access, manage and create invoices
- **“Setup”**: allows suppliers to manage admin tasks and invite additional users, set up remit to addresses, etc



# Navigating the CSP: Homepage Overview (2/2)

## Description:

- **“Profile Summary”**: provides summary of profile and other profile information
- **“Merge Suggestions”**: If applicable, use this section to merge multiple CSP accounts
- **“Latest Customers”**: lists all of the supplier’s trading customers via Coupa







# Inviting Additional Team Members

# Inviting Additional Team Members (1/2)

- Once you are logged into the CSP, click **“Setup”**
  - Click on **“Invite User”** in the Users section
  - On the Invite User screen, fill in the required information

The screenshot displays the CSP Admin Users interface. At the top, a blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Payments, Business Performance, Sourcing, and Add-ons. The 'Setup' link is highlighted with a red box. Below the navigation bar, the 'Admin' section is active, showing 'Customer Setup' options. The main content area is titled 'Admin Users' and features a table with columns for Users, Permissions, and Customer Access. A red box highlights the 'Invite User' button in the top right corner of the Admin Users section. The table lists a user named 'F Z' with the email 'foivos.zografos@kpmg.co.uk' and a status of 'Active'. The permissions listed include ASN, Admin, Business Performance, Catalogues, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The customer access is 'Babcock International - Development Environment'.

Users	Permissions	Customer Access
F Z foivos.zografos@kpmg.co.uk Status: Active <a href="#">Edit</a>	ASNs Admin Business Performance Catalogues Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Babcock International - Development Environment

# Inviting Additional Team Members (2/2)

- On the Invite User Screen, fill in the required information
- To control the permissions and customers that the new user has access to, check and uncheck the relevant fields in the Permissions and Customers sections. Only Supplier CSP admin users have the permission to invite users
- Click on “**Send Invitation**” to send invite via email. Once the invited user registers, they will be able to log into the CSP using their own log in credentials

The screenshot shows the 'Invite User' form with the following sections:

- Name Fields:** First Name, Last Name, and Email (with a red asterisk indicating it is required).
- Permissions:** A list of checkboxes for various permissions, including All, Admin, Orders, Invoices, Catalogues, Profiles, ASNs, Service/Time Sheets, Payments, Order Changes, Early Payments, Business Performance, Sourcing, and Order Line Confirmation. There are also radio buttons for 'Restricted Access to Orders' and 'Restricted Access to Service/Timesheets', each followed by an '@ All' option.
- Customers:** A list of checkboxes for customer access, including All and Babcock International - Development Environment.
- Buttons:** A 'Cancel' button and a 'Send Invitation' button (highlighted with a red box).

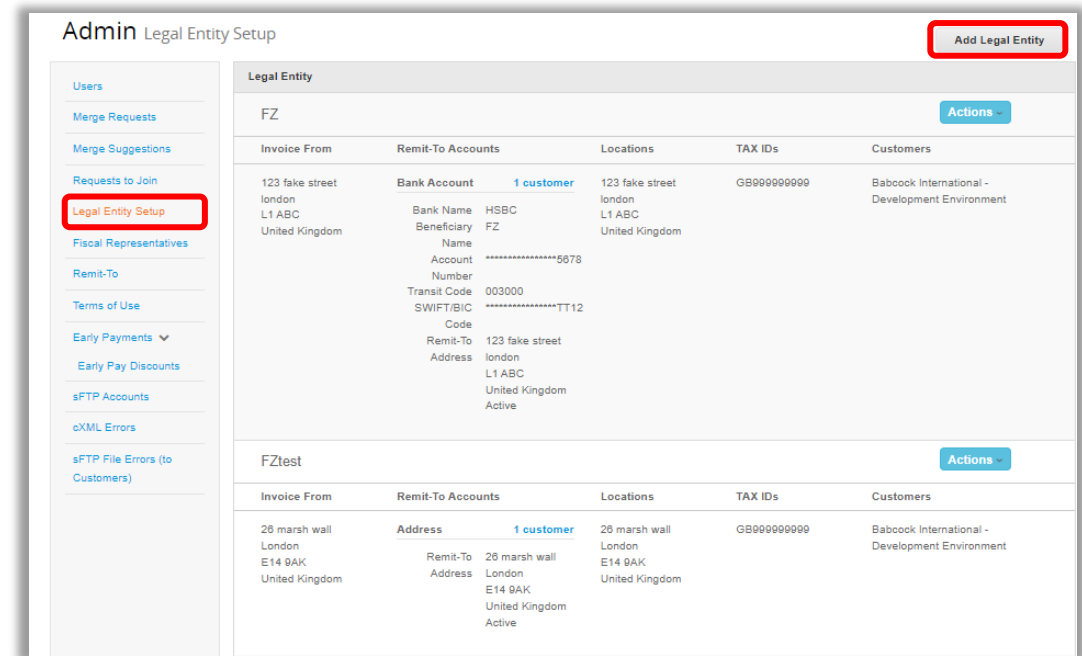
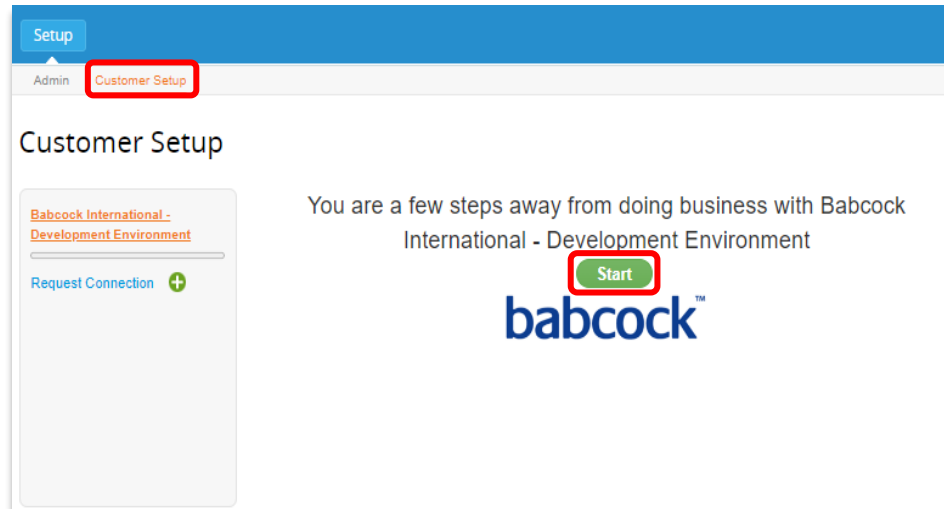


A person wearing a full-body yellow protective suit, a white hood, and gloves is working at a computer workstation in a laboratory or industrial setting. The person is leaning over a desk with a monitor and keyboard. The background is filled with complex machinery, pipes, and equipment, suggesting a high-tech or hazardous environment. A large grey cylindrical component is visible on the right side of the frame.

# Setting Up Legal Entity Information

# Setting Up Legal Entity Information (1/8)

- On the CSP homepage, go to **“Setup”**
  - Click on **“Customer Setup”**
  - On the Customer Setup page, click on **“Start”**
  - On the Admin **“Legal Entity Setup”** page, click on **“Add Legal Entity”**



# Setting Up Legal Entity Information (2/8)

- The “**Where’s your business located?**” screen pops up. Fill in the “**Legal Entity Name**” and “**Country/Region**” details and click “**Continue**”
- Fill in the required Type of Company field (e.g. Limited, LLP etc.). Optionally, fill in the Board of Directors field
- Click “**Save & 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/Region

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

Cancel **Continue**

Miscellaneous Information

1 2 3 4

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/Region

\* Type of Company

Board of Directors

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Cancel **Save & Continue**



# Setting Up Legal Entity Information (3/8)

- Select the “Which customers do you want to see this?” legal entity you are creating by ticking the relevant box
- Fill in the “What address do you invoice from?” fields and choose to use the address for the remit to and or shipping address by ticking and unticking the appropriate boxes

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

All

Babcock International - Development Environment

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Post Code

Country/Region United Kingdom

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 as where you receive government documents.

# Setting Up Legal Entity Information (4/8)

- Fill in the “**What is your Tax ID?**” section:
  - Enter your tax country and your local VAT ID number in that country. Click on “Add additional Tax ID” if you are VAT/GST registered in other countries, which will be used to invoice "Customer", and enter the relevant country/VAT ID details
  - If you don't have a VAT ID, you can check the “I don't have a VAT/GST Number” box. Then fill in the Local Tax ID field

Optionally, fill in the “**Miscellaneous**” section. Enter an Invoice-From Code and a preferred language to use in the CSP. The Invoice-from code is used to tie supplier's CSP Invoice From Address to the corresponding address in the supplier's ERP.

The screenshot shows a web form with two main sections. The top section is titled "What is your Tax ID?" and contains a dropdown menu for "Country/Region" set to "United Kingdom", a text input field for "VAT ID", and a checkbox labeled "I don't have a VAT/GST Number". Below this is a blue link that says "Add additional Tax ID". The bottom section is titled "Miscellaneous" and contains a text input field for "Invoice-From Code" and a dropdown menu for "Preferred Language" set to "English (UK)". At the bottom right of the form are "Cancel" and "Save & Continue" buttons. Red boxes highlight the "What is your Tax ID?" and "Miscellaneous" section headers.

# Setting Up Legal Entity Information (5/8)

- Ensure your VAT registration number is correct and relates to the country specified. This information will be used by Coupa to generate a tax invoice on your behalf
- For suppliers using the cXML invoicing method, create an 'Invoice From Code' and reference it in your cXML invoices. This will enhance the success of cXML invoice address information matching with CSP and is strongly recommended
- If you ticked the box to use Invoice From Address as Remit to and/or Ship From address, they will have the same code as the Invoice From Address.



# Setting Up Legal Entity Information (6/8)

- Select **“Payment Type”** – Address, Bank Account or Virtual Card
  - For Bank Account, fill in the relevant fields to complete this section. The Remit-To Address is auto-populated if set in. Click on Save & Continue. For Address, the Remit-To-Address previously entered is shown and users can edit, deactivate or add Remit-To Addresses
  - Click on **“Save & Continue”**
  - Click on **“Next”** to proceed

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 Street 1

Address Line 2

City LONDON

State

Post Code E12 85P

Country/Region United Kingdom

Cancel Save & Continue



Where do you want to receive payment?

1 2 3 4

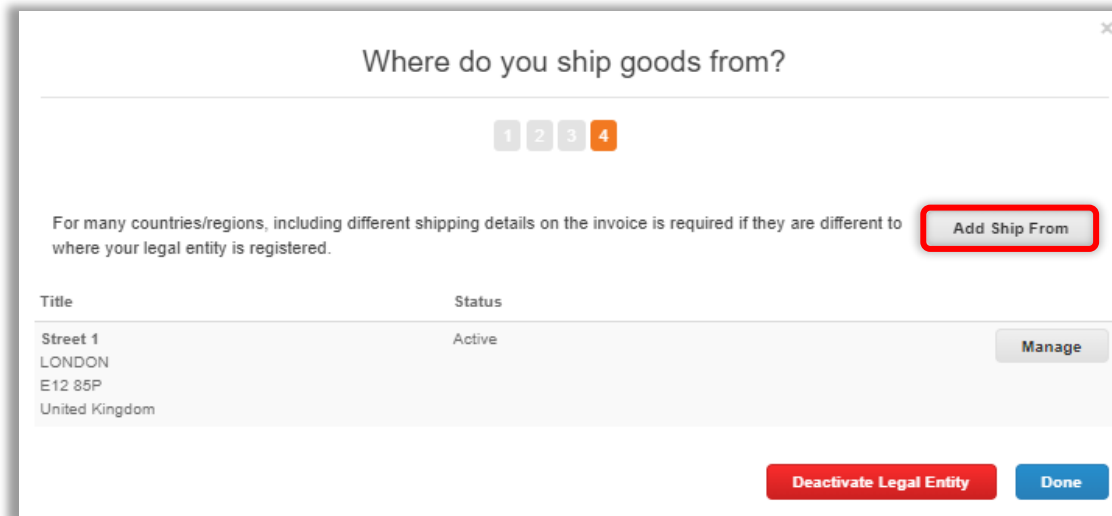
Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next. Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	Street 1 LONDON E12 85P United Kingdom	Active	Manage

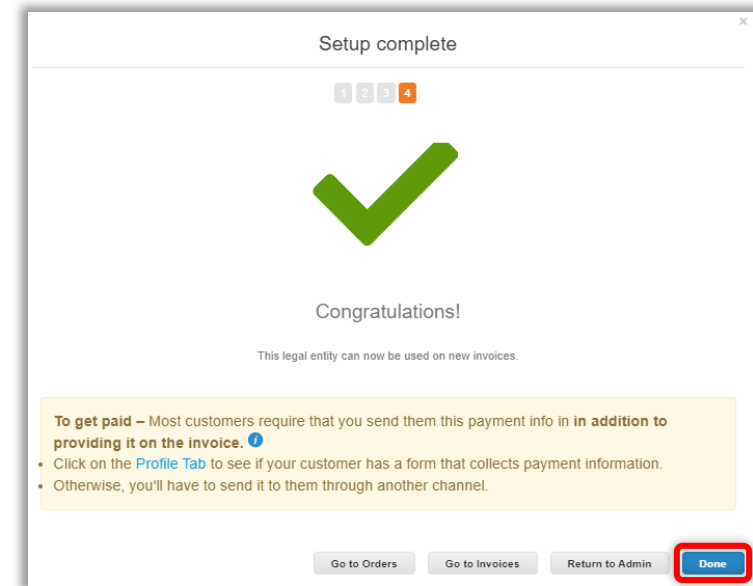
Deactivate Legal Entity Cancel Next

# Setting Up Legal Entity Information (7/8)

- On the Where do you ship goods from? Screen, manage Ship From Addresses. This may be auto-populated if the Ship From Address was set in the previous steps. Click **“Add Ship From”** and add a new address. If you would like to use the same address.
  - Click **“Done”** to complete setup



Title	Status
Street 1 LONDON E12 85P United Kingdom	Active



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.

# Setting Up Legal Entity Information (8/8)

It is important for tax purposes that you reflect where you ship goods from when it is different to your legally registered country.

For example, if you are registered in the UK but ship goods from a warehouse in Poland, please ensure that you add this address here to reflect this accurately when it comes to creating invoices.

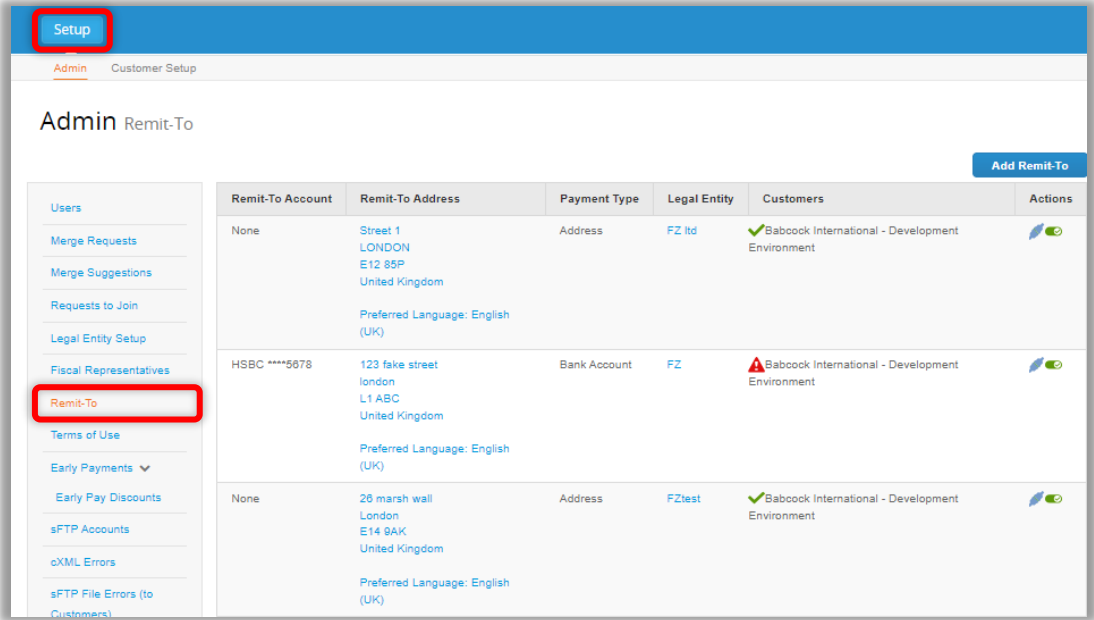
A black submarine is shown on the water, with several crew members in red and yellow gear on deck. The background features a large, snow-capped mountain range under a clear blue sky. The submarine's conning tower is prominent, and two large black pipes extend from the deck.

# Manage Remit-To Accounts






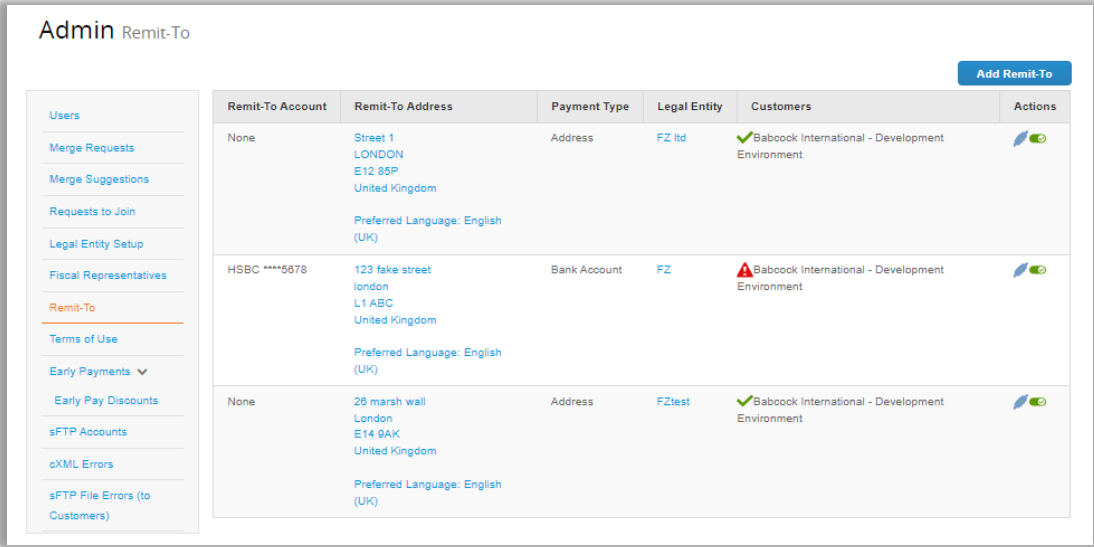
# Manage Remit-To Accounts – Edit or Deactivate (1/2)

- On the CSP homepage, go to “**Setup**”
  - Click on “**Remit-To**”. The Admin Remit-To page contains a log of all Remit-To created. You can edit usage, add and deactivate Remit-To accounts









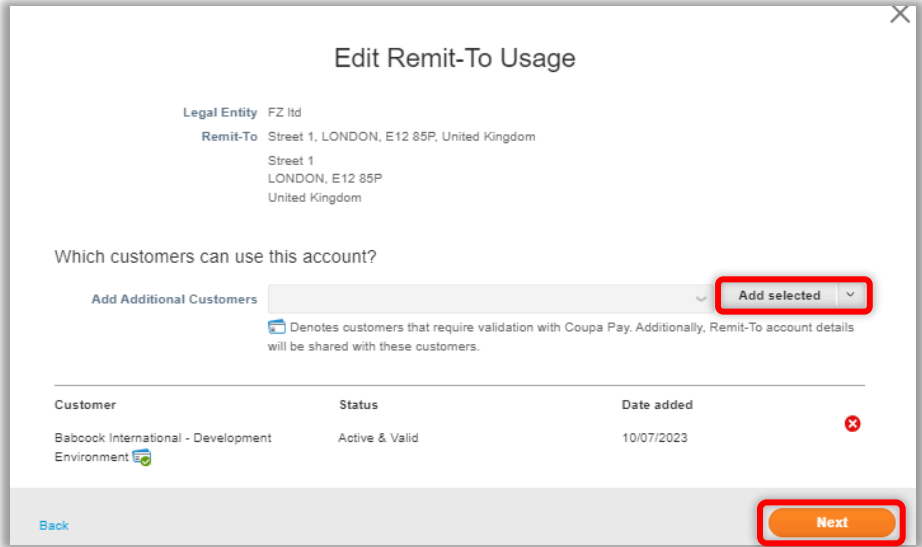
# Manage Remit-To Accounts – Edit or Deactivate (2/2)

- To deactivate a Remit-To account, click on the  icon. Once deactivated, this cannot be reversed. Coupa also retains the inactive Remit-To account in the log for audit purposes
  - To edit Remit-To Usage, click on the  icon
  - To add a customer, click on the “**Add Selected**” drop down and select customer account to add additional customers
  - To remove a customer, click on the  icon to remove existing customer
- Click on “**Next**” to save changes



Admin Remit-To

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	Street 1 LONDON E12 8SP United Kingdom  Preferred Language: English (UK)	Address	FZ ltd	 Babcock International - Development Environment	
HSBC ****5678	123 fake street london L1 ABC United Kingdom  Preferred Language: English (UK)	Bank Account	FZ	 Babcock International - Development Environment	
None	28 marsh wall London E14 9AK United Kingdom  Preferred Language: English (UK)	Address	FZtest	 Babcock International - Development Environment	






Edit Remit-To Usage

Legal Entity FZ ltd  
Remit-To Street 1, LONDON, E12 8SP, United Kingdom  
Street 1  
LONDON, E12 8SP  
United Kingdom

Which customers can use this account?

Add Additional Customers  **Add selected**

 Denotes customers that require validation with Coupa Pay. Additionally, Remit-To account details will be shared with these customers.

Customer	Status	Date added	
Babcock International - Development Environment 	Active & Valid	10/07/2023	

Back **Next**

# Manage Remit-To Accounts – Add new Remit-To (1/3)

- On the CSP homepage, go to **“Setup”**
- Click on **“Remit-To”**
- The Admin Remit-To page contains a log of all Remit-To created. Click **“Add Remit-To”** to create a new account
- Click on **“Next”** on the Add Remit-To page

Admin Remit-To

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	Street 1 LONDON E12 8SP United Kingdom  Preferred Language: English (UK)	Address	FZ Ltd	✓ Babcock International - Development Environment	
HSBC ****5878	123 fake street london L1 ABC United Kingdom  Preferred Language: English (UK)	Bank Account	FZ	⚠ Babcock International - Development Environment	
None	28 marsh wall London E14 9AK United Kingdom  Preferred Language: English (UK)	Address	FZtest	✓ Babcock International - Development Environment	



Add Remit-To

Legal Entity

Invoice From Address 123 fake street  
london , L1 ABC  
United Kingdom

Back Next

# Manage Remit-To Accounts – Add new Remit-To (2/3)

- On the next page, fill in all the relevant fields
- Click **“Save & Continue”**

The screenshot shows the first step of a three-part process to add a new Remit-To account. The title is "Add a new Remit-To account". At the top, there is a dropdown menu for "Payment Type" set to "Bank Account". Below this is a section titled "What are your Bank Account Details?". This section contains several input fields: "Bank Account Country/Region" (set to "United Kingdom"), "Bank Account Currency" (set to "GBP"), "Beneficiary Name" (set to "FZ"), "Bank Name", "Account Number", "Confirm Account Number", "Sort Code", "SWIFT/BIC Code", "Branch Code", and "Bank Account Type" (set to "Business"). There is also a checkbox for "My bank does not have a BIC code" and a "Supporting Documents" section with a "Choose Files" button. Below this is a section titled "What is your Bank's Branch Address?" with fields for "Address Line 1", "Address Line 2", "City", "State" (with a "Select an Option" dropdown), and "Postcode". The final section is "What is your Remit-To Address?" with a "Saved Addresses" dropdown (set to "Select") and a "New Address" radio button. A "Recommended" box at the bottom right contains the text: "If you receive payments to a different location to where your business is registered, add the address here."

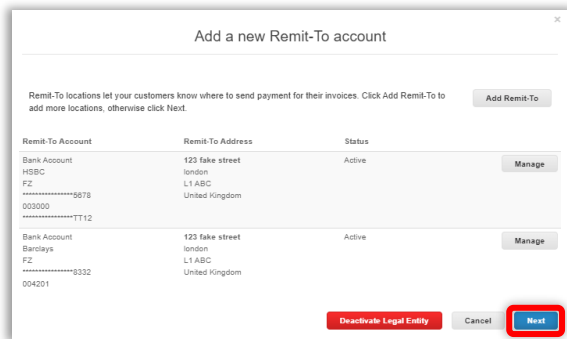


The screenshot shows the second step of the process. It features three main sections: "What is your Remit-To Integration Code? (optional)", "Who is your Remit-To Contact? (optional)", and "Which customers can use this account?". Each of the first two sections has a right-pointing arrow next to it, indicating that the user can click to expand or view more options. The third section, "Which customers can use this account?", has two checkboxes: "All" (checked) and "Babcock International - Development Environment" (checked). At the bottom right, there are two buttons: "Cancel" and "Save & Continue", with the "Save & Continue" button highlighted with a red border.



# Manage Remit-To Accounts – Add new Remit-To (3/3)

- Click on “Next”
- Click on “Done”
- Click on “Add Now”



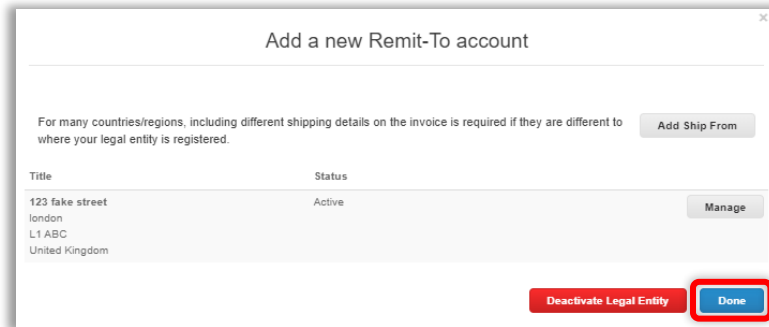
Add a new Remit-To account

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	
Bank Account HSBC FZ .....9678 003000 .....TT12	123 fake street london L1 ABC United Kingdom	Active	Manage
Bank Account Barclays FZ .....8332 004201	123 fake street london L1 ABC United Kingdom	Active	Manage

Deactivate Legal Entity Cancel **Next**



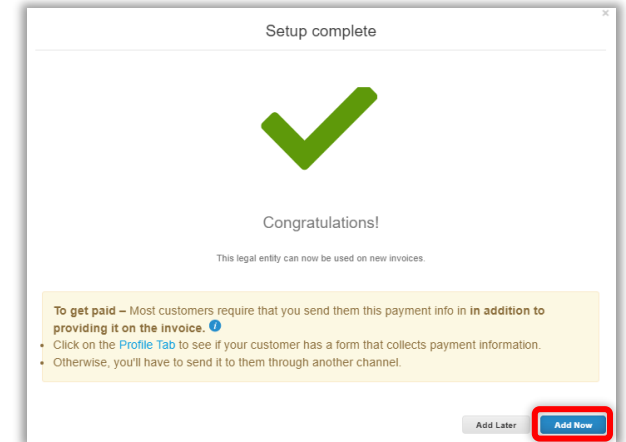
Add a new Remit-To account

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	
123 fake street london L1 ABC United Kingdom	Active	Manage

Deactivate Legal Entity **Done**



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.

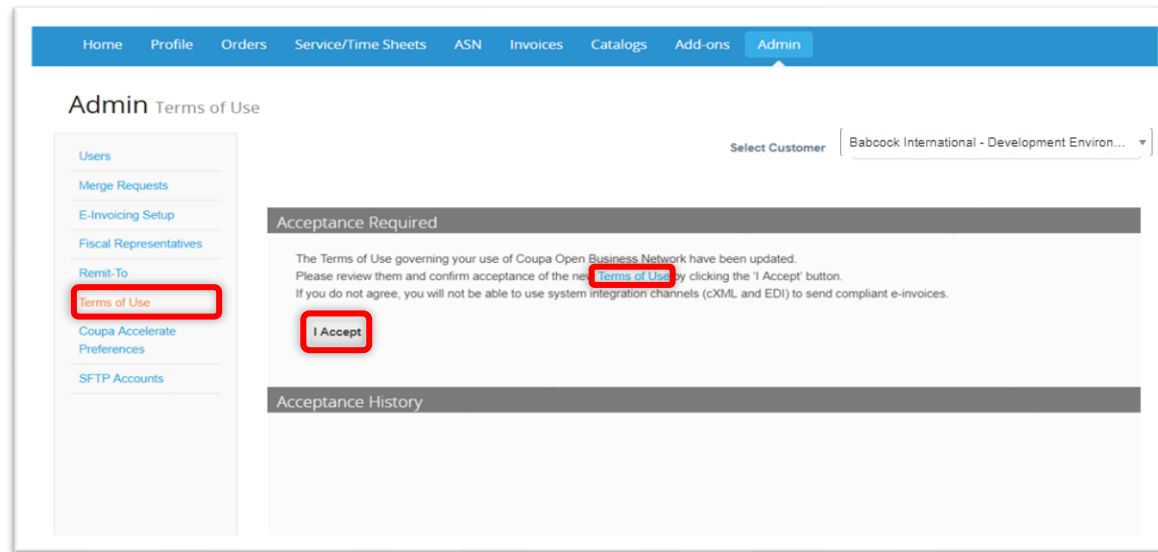
Add Later **Add Now**

An aerial, top-down view of a blue propeller aircraft flying over a large body of water. The aircraft is centered in the frame, with its wings spread wide. The water is a deep blue-green color. In the background, a dam structure is visible, along with a forested hillside and some buildings. The overall scene is bright and clear.

# Accepting Terms of Use for E-Invoicing

# Accepting Terms of Use (1/2)

- Go to Admin, and choose “**Terms of Use**”
- Read the ‘Terms of Use’ as required
- Accept Terms of Use by clicking I Accept



# Accepting Terms of Use (2/2)

- As part of the Coupa terms and conditions you explicitly agree to Coupa issuing invoices on your behalf
- From a VAT perspective, for countries where Coupa creates “compliant invoices”, this means that the PDF generated by Coupa is your legal invoice (and "Customer's" evidence to support VAT recovery). Please refer to the Additional Information section for list of countries with Coupa compliant e-invoicing
- You must archive this invoice in line with your legal retention periods and requirements. You should not attach (or issue to "Customer") an invoice from your system after signing up to these terms

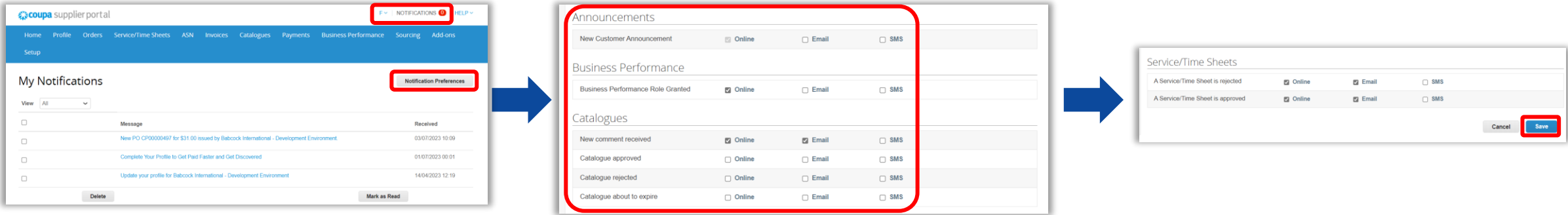




# Managing Notifications

# Managing Notifications

- You can manage your notifications by clicking **“Notifications”**
- Click **“Notification Preferences”**
- You can enable / disable Online, Email and SMS notifications for **“Announcements, Business Performance, Catalogues”** etc
- Once finished, click **“Save”** to save your notification settings





A worker wearing a full-body yellow protective suit, a white hood, and gloves is leaning over a desk in a laboratory or industrial setting. The worker is interacting with a computer monitor and keyboard. The background is filled with complex machinery, pipes, and equipment. A large grey cylindrical component is visible on the right side of the frame. The text "Additional Information" is overlaid in a white box in the center of the image.

# Additional Information

# Coupa Compliant E-Invoicing Country List

Coupa compliant e-invoicing country list
Australia
Austria
Bahrain
Bangladesh*
Belgium
Brazil*
Bulgaria
Canada
Colombia*
China*
Croatia
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece

Coupa compliant e-invoicing country list
Hong Kong
Hungary*
India
Ireland
Italy
Japan
Latvia
Lithuania
Luxembourg
Malaysia
Malta
Mexico
Montenegro
Myanmar*
Namibia
Netherlands
New Zealand

Coupa compliant e-invoicing country list
Norway
Pakistan*
Poland
Romania
Saudi Arabia
Serbia
Singapore
Slovakia
Slovenia
South Africa
South Korea*
Spain
Sweden
Switzerland
United Arab Emirates
UK
USA

**Notes**

List correct as of 05/2023

\* Validation only invoice - Invoice content checks; Coupa does not create the legal invoice on behalf of the supplier; No support for digital signatures and Trustweaver archiving.



**babcock<sup>TM</sup>**