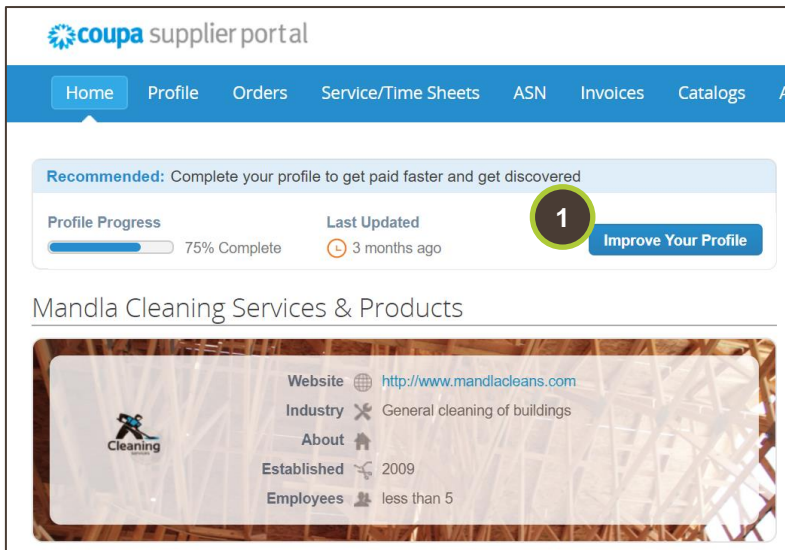


### How to add a legal entity in the Coupa Supplier Portal (CSP)

In this quick reference guide, we will show you how to add a legal entity. To submit an invoice to Exxaro, all suppliers are required to add a legal entity, (including banking details/remit to information).

Please login to the Coupa Supplier portal and continue with the steps below.

**Note:** The details in the screenshots provided are fictitious and are solely used for demonstration purposes.



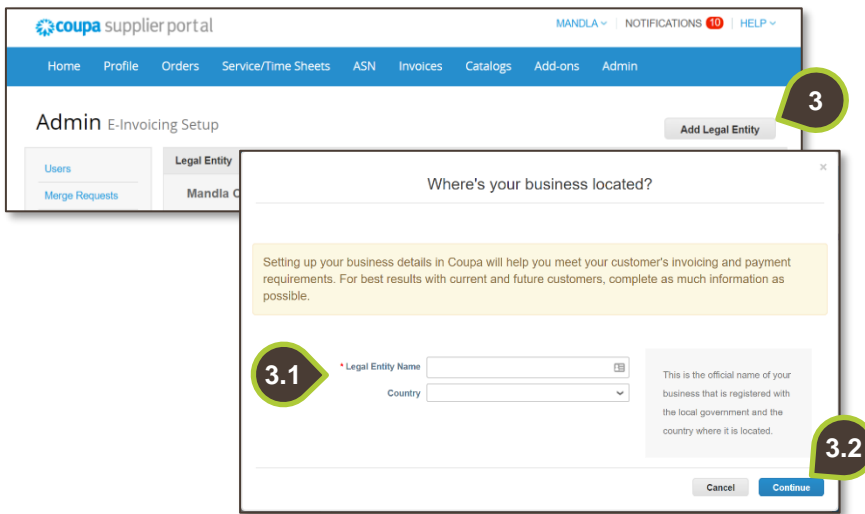
#### 1. Improve your Profile

From your **Home** page, click **Improve your Profile**.

The screenshot shows the 'Primary Contact' form. It contains several input fields: '\* First Name' (Mandla), '\* Last Name' (Mahlangu), '\* Email' (carpets@testing.s2pconsulting.co.za), 'Work Phone' (+1 201-555-5555), 'Mobile Phone' (+1 201-555-5555), 'Fax Number' (+1 201-555-5555), and 'PO Delivery Email' (carpets@testing.s2pconsulting.co.za). At the bottom of the form, a yellow banner contains a button labeled '2 Add Legal Entity' with a green circle around the number '2'. To the right of the button is a warning icon and the text: 'Most customers require Legal Entity information for invoicing'.

#### 2. Add Legal Entity

Click **Add Legal Entity** to add your entity to be able to invoice.



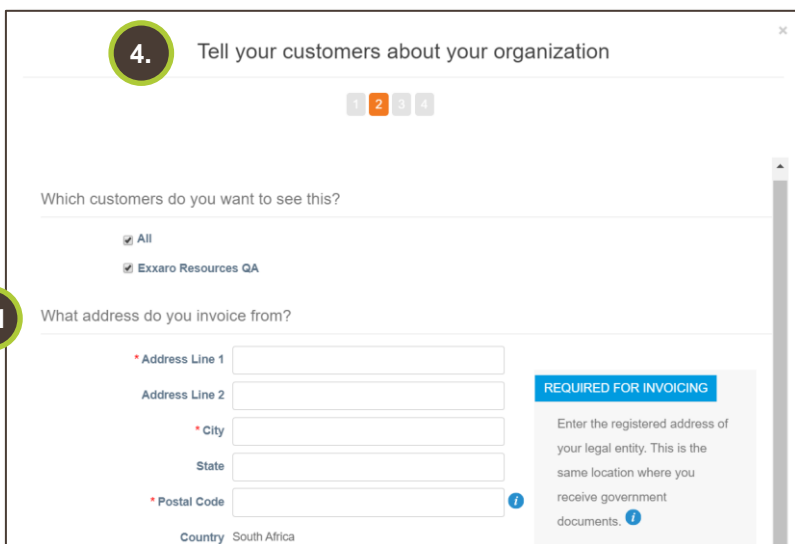
### 3. In the Admin tab

Click **Add Legal Entity** to add your legal entity name.

3.1. Populate the fields accordingly:

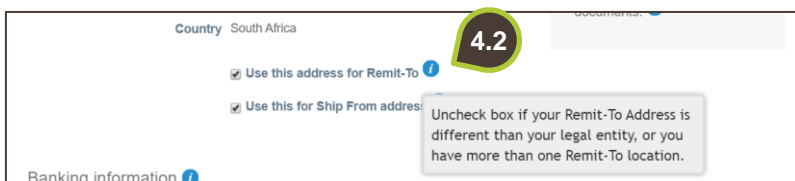
- **Legal Entity Name**
- **Country**

3.2. Click **Continue**.



### 4. 'Tell your Customers about your organization' page

4.1. Populate all the mandatory fields under 'What address do you invoice from?'.



4.2. Hover on the blue "i" for more information about the check boxes.

**4.3** Banking information ⓘ

Bank Account Country: South Africa

Bank Account Currency:

\* Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

\* Account Number:

Account Number Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

**4.4** Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

**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).

**4.3.** Populate all necessary field under **Banking information** section.

**4.4.** Populate fields in the **Bank address** section.

What is your Tax ID? ⓘ

Country: South Africa

**4.5** \* VAT ID:

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

**4.6** Invoice From Code:

Preferred Language: English (South Africa)

**4.7**

Cancel Save & Continue

**4.5.** Populate your **VAT ID**.

**4.6.** In the **Miscellaneous** section, populate **Invoice From Code** field if applicable.

**4.7.** Click **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	Banking information	Status
23 Knopblom Pretoria 0081 South Africa	ABSA *****4345 123456789098765	Active

Manage

**5.**

Deactivate Legal Entity Cancel Next

**5. Where do you want to receive payment?**

Click **Next** if you are done

Where do you ship goods from?

1 2 3 4

For many countries 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
23 Knopblom Pretoria 0081 South Africa	Active

Manage

Deactivate Legal Entity Done

6.

## 6. Where do you ship goods from?

Click **Done**

Setup Complete

1 2 3 4

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 **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.

Go to Orders Go to Invoices Return to Admin

7.

## 7. Setup Complete

A popup screen will indicate that your setup is complete.

Click **Return to Admin** if you are done.

Admin E-Invoicing Setup

- Users
- Merge Requests
- E-Invoicing Setup**
- Fiscal
- Representatives
- Remit-To
- Terms of Use
- Coupa Accelerate Preferences
- SFTP Accounts
- cXML Errors

**Legal Entity**

**Carpet cleaning services**

23 Knopblom  
Pretoria  
0081  
South Africa

**Remit-To Address**

23 Knopblom  
Pretoria  
0081  
South Africa

**Ship From Address**

23 Knopblom

8.

## 8. Remit to:

Navigate to the **Remit to subtab** (in the Admin page) and notice the newly added banking details appear in this area (but the details are managed from the E-Invoicing setup page).

For additional support contact the help desk at 0872 839 704, or email [vendor.services@exxaro.com](mailto:vendor.services@exxaro.com) for assistance.