

Job Aid – Supplier: How to Setup a Legal Entity for Invoicing within the Coupa Supplier Portal – Coupa Tool

How to Setup a Legal Entity for Invoicing within the Coupa Supplier Portal

In this job aid:

✓ **How to Setup a Legal Entity for Invoicing within the Coupa Supplier Portal**

This job aid is to be leveraged by DaVita suppliers that have an existing account in the Coupa Supplier Portal (CSP), or the ability to create a CSP account. A Legal Entity must be created before invoices can be submitted through the CSP. This job aid will outline how to successfully create a Legal Entity within the CSP.

Legal Entities Overview

- A Legal Entity is a representation of your company and gives your Coupa customers the information they need to do business with you, including addresses, payment information, and remit-to details. Legal Entities in Coupa are comprised of 3 addresses:
 - **Invoice-From Address:** The main address which invoices are sent from.
 - **Remit-To (Pay-To) Address:** The main address which payment is to be sent .
 - **Ship-From Address:** The main address which goods are shipped from (if applicable to your company).
- Coupa Resource(s):
 - Legal Entity Setup: <https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/financial-setup/set-up-legal-entities>
 - Payment Method Management: <https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal/set-up-the-csp/financial-setup/view-and-manage-remit-to-information>

Process – Creating a Legal Entity

- The most common way to setup a Legal Entity is during your Coupa Supplier Portal (CSP) account creation. For details on this process, please see our Job Aid titled: *How to Create a Coupa Supplier Portal Account*.
- A Legal Entity can also be created under the **Business Profile** tab within the CSP. Simply navigate to that tab, then click the **Legal Entities** subtab. Once there, the **Create** button will allow you to get started.

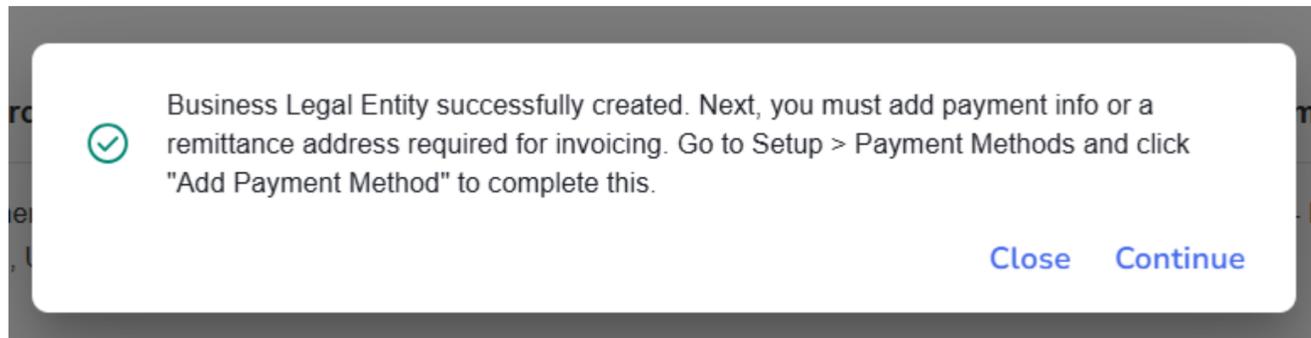
1. After clicking the create button, complete the following items:

- **Legal Entity Name:** Official name of your business that is registered with the local government.
- **Country or Region:** Country or region where your business is located.
- **Invoice from Address:** Address that you invoice from or the address that you receive mailed and in-person payments.
- **Ship from Address:** Address that you send your goods from. It can be the same Invoice from Address or a different one.

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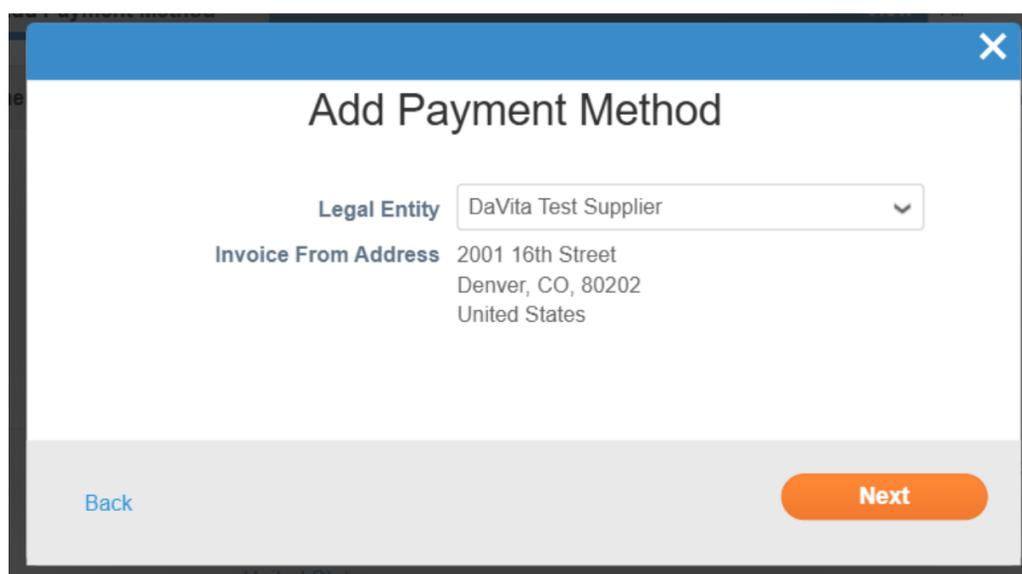
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- After all information has been entered, select the **Save** button. Once you save, the following message will display:



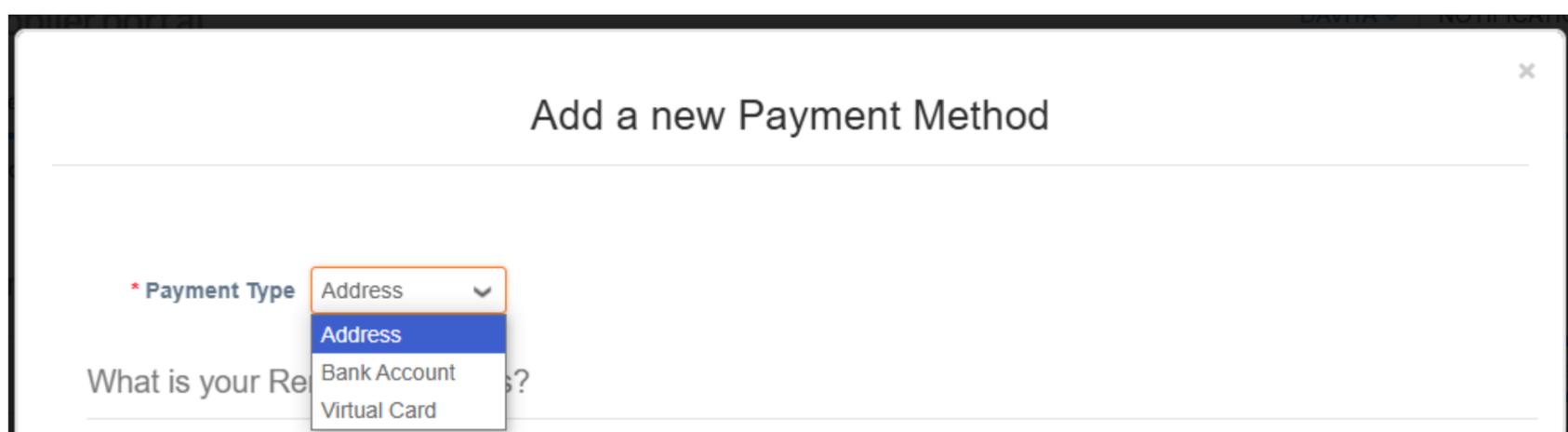
Click **Continue** to add your payment information to this specific Legal Entity.

- In the **Payment Methods** window, click the button **Add Payment Method**. Once the following window appears, select the appropriate Legal Entity from the drop-down menu and click **Next**.



- Select what kind of **Payment Type** you would like to setup: Address, Bank Account, or Virtual Card.

Note: All Payment Types REQUIRE a Remit-To Address to be associated with it. This Remit-To address should match the Remit-To address which is presented on the invoices you submit to DaVita and the address that DaVita has in our records for remittances/payment.



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Process – Creating an Address Payment Type

1. If you choose **Address** as your **Payment Type**, simply enter your Remit-To Address in the fields that populate below. **NOTE:** DaVita has migrated away from physical payment methods like Check. Payments from DaVita will be sent via Wells Fargo Credit Card OR via provided banking details.

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Add a new Payment Method

* Payment Type Address ▾

What is your Remit-To Address?

* Address Line 1 2001 16th St +

* City Denver

State Colorado - CO ▾

* Postal Code 80202

* Country/Region United States ▾

Recommended

If you receive payments to a different location to where your business is registered, add the address here.

What is your Remit-To Integration Code? (optional) i >

Which customers can use this account?

2. After your Remit-To Address has been entered, select the customers you would like to use this **Payment Method** for within Coupa and select **Save & Continue**.

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Process – Creating a Bank Account Payment Type

1. If you choose **Bank Account** as your **Payment Method**, you will be prompted to enter your banking details in the fields that populate below. Payments will be initiated via direct deposit into the provided bank account.

What are your Bank Account Details?

Bank Account Country/Region:

State:

Bank Account Currency:

Beneficiary Name:

Bank Name:

Account Number:

Confirm Account Number:

ACH Routing Number:

Wire Routing Number:

SWIFT/BIC Code:

My bank does not have a BIC code

Branch Code:

Bank Account Type:

Supporting Documents No file chosen

Email Address

2. Although payments will be delivered electronically, you will need to enter the Remit-To address associated with this bank account. **REMINDER: This Remit-To address should match the Remit-To address which is presented on the invoices you submit to DaVita and the address that DaVita has in our records for remittances/payment.**

What is your Remit-To Address?

Saved Addresses

New Address

*** Address Line 1**

*** City**

State

*** Postal Code**

*** Country/Region**

Recommended

If you receive payments to a different location to where your business is registered, add the address here.

3. After your Remit-To Address has been entered, select the customers you would like to use this **Payment Method** for within Coupa and select **Save & Continue**.

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Process – Creating a Virtual Card Payment Type

1. If you choose **Virtual Card** as your **Payment Type**, simply enter the Email Address where you would like to receive your virtual card information. **Note:** DaVita issues virtual card payments via Wells Fargo Credit Card. Distinct card information will be sent to the designated email for each payment.

* Payment Type Virtual Card

Virtual Card information

* Email Address

2. Although payments will be delivered electronically, you will need to enter the Remit-To address associated with this bank account. **REMINDER: This Remit-To address should match the Remit-To address which is presented on the invoices you submit to DaVita and the address that DaVita has in our records for remittances/payment.**

What is your Remit-To Address?

Saved Addresses

New Address

* Address Line 1

* City

State Select an Option

* Postal Code

* Country/Region United States

Recommended

If you receive payments to a different location to where your business is registered, add the address here.

3. After your Remit-To Address has been entered, select the customers you would like to use this **Payment Method** for within Coupa and select **Save & Continue**.

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Process – Managing Legal Entities and Payment Methods

Legal Entities:

Once created, Legal Entities cannot be edited. If you need to make a change, please create a new Legal Entity and share with your customer(s).

Payment Methods:

Although Legal Entities cannot be edited, the following information associated with a Legal Entity can: Payment Information and Customer Connections.

- Share a payment method with a customer:
 - Go to **Setup > Admin > Payment Methods**.
 - In the **Actions** column, select **Share** ().
 - On the **Edit Payment Method Usage** page that appears, select the customers you want to share the payment method with from the **Add Additional Customers** dropdown list.

Select **Add Selected**. To share it with all your customers, select **Add All** from the **Add Selected** drop-down.

- Deactivate a payment method
 - Go to **Setup > Admin > Payment Methods**.
 - In the **Actions** column, select **Disable** ().

WARNING: Deactivation cannot be undone. If the payment method you are deactivating is the only payment method associated with the legal entity, you'll see a warning message that deactivating the payment method will make the legal entity invalid. If you choose to deactivate the payment method, you'll need to assign another payment method to that legal entity to continue to use it.