



The Financial Times

**Coupa Supplier Portal
User Guide**



Invoicing

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- Submitting Invoices
- Viewing Invoices

Setting up E-invoicing (UK Suppliers only at this time)

Setting up Invoicing in the CSP

Legal Entity Set-up

! EXTREMELY IMPORTANT

In order to be able to start posting invoices, you must first complete the Legal Entity set-up and complete your legal entity details.

Please remember that you must create in the CSP exactly the same Legal Address (Address and VAT ID) that you have already communicated to the FT.

If you need to change the Legal address - first deactivate the confirmed one and create the new one. If you create a new Legal Address in the CSP with information not provided to the FT before, your invoice may be disputed (where legally allowed).

For UK based suppliers - Please note that the information provided in the e-Invoice set-up will be used in the invoice creation process and submitted to the FT in your invoices (except bank details).

For suppliers outside the UK - Please note that you would need to attach PDF of the invoice to the PO for payment. The PDF invoice will be the legal invoice for payment.

Setting up Invoicing in the CSP

Step 1:

To submit Invoices through the CSP, you will first need to add a Legal Entity.

- 1: Select **Setup** in the toolbar, select the **Admin** tab.
- 2: Select **Legal Entity Setup**.
- 3: Select **Add Legal Entity**.

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. A blue toolbar contains 'Setup' (highlighted with a red box and a '1' callout), 'Admin' (highlighted with a red box and a '1' callout), 'Partner Setup', and 'Connection Requests'. The 'Admin' tab is active, showing a sidebar with 'Legal Entity Setup' (highlighted with a red box and a '2' callout) and other options like 'Users', 'Merge Requests', and 'Requests to Join'. The main content area is titled 'Legal Entity Setup' and features an 'Add Legal Entity' button (highlighted with a red box and a '3' callout). The page content includes instructions: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity.' A note at the bottom states: 'Please note, if you are a European Company, or have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-Invoicing Setup to continue.'

Setting up Invoicing in the CSP

Step 2:

1: A pop up will appear prompting you to add the **Legal Entity Name** and the **Country/Region** where it is registered, enter your details and select **Continue**.

2: You will be prompted to add further Miscellaneous Information. Once all mandatory fields are complete, select **Save & Continue**.

The image displays two screenshots of the Coupa setup process. The top screenshot is titled "Where's your business located?" and contains a yellow informational banner. Below the banner are two input fields: "* Legal Entity Name" and "* Country/Region". A red box highlights these fields and a "Continue" button at the bottom right. The bottom screenshot is titled "Miscellaneous Information" and also features a yellow informational banner. It contains four input fields: "* Legal Entity Name" (with "Baringa" entered), "* Country/Region" (with "United Kingdom" selected), "* Type of Company", and "Board of Directors". A red box highlights the first two fields and a "Save & Continue" button at the bottom right. Both screenshots include "Cancel" buttons.

Setting up Invoicing in the CSP

Step 3:

You will be prompted to complete further company information in the pop up window.

1: Add your e-invoicing address

2: Leave these boxes ticked if your Remit-To and Ship From address remain as above

3: Enter your VAT ID

4: Add your Invoice From Code – this is the same as in your ERP System

Once complete select **Save & Continue**.

The screenshot shows a web form for setting up invoicing. It is divided into two main sections. The top section is titled "Which customers do you want to see this?" and "What address do you invoice from?". It contains several input fields: "Address Line 1", "City", "State" (a dropdown menu), "Postal Code", and "Country/Region" (set to "United Kingdom"). There are two checkboxes: "Use this address for Remit-To" and "Use this for Ship From address", both of which are checked. A blue box on the right side of this section is titled "REQUIRED FOR INVOICING" and contains text: "Enter the registered address of your legal entity. This is the same location where you receive government documents." The bottom section is titled "What is your Tax ID?". It contains a "Country/Region" dropdown (set to "United Kingdom"), a "VAT ID" input field, and a checkbox "I don't have a VAT/GST Number" which is unchecked. Below this is a link "Add additional Tax ID". The bottom-most section is titled "Miscellaneous" and contains an "Invoice From Code" input field and a "Preferred Language" dropdown (set to "English (UK)"). At the bottom right of the form are "Cancel" and "Save & Continue" buttons. Red boxes and numbers 1 through 4 are overlaid on the form to highlight specific areas: 1 points to the address fields, 2 points to the checkboxes, 3 points to the VAT ID field, and 4 points to the Invoice From Code field.

Setting up Invoicing in the CSP

Step 4:

1: Confirm or edit your Remit-To address.

2: Confirm or edit your Ship From address. Once you have confirmed these are correct

3: Select **Next** until the Setup Complete pop up window is displayed. You will see a message confirming your legal entity has been set up and can be used on new invoices, select **Done**.

The image displays three sequential screenshots from the CSP interface:

- 1. Where do you want to receive payment?**: This screen shows a progress indicator with step 1 highlighted. Below the heading, there is a table with columns for Remit-To Account, Remit-To Address, and Status. The Remit-To Address is listed as 62 Buckingham Gate, London, SW1E 6AJ, United Kingdom. The Status is Active. A 'Manage' button is visible next to the address. At the bottom, there are buttons for 'Deactivate Legal Entity', 'Cancel', and 'Next'.
- 2. Where do you ship goods from?**: This screen shows a progress indicator with step 2 highlighted. Below the heading, there is a table with columns for Title and Status. The Title is listed as 62 Buckingham Gate, London, SW1E 6AJ, United Kingdom. The Status is Active. A 'Manage' button is visible next to the title. At the bottom, there are buttons for 'Deactivate Legal Entity' and 'Done'.
- 3. Setup Complete**: This screen shows a progress indicator with step 3 highlighted. A large green checkmark is displayed, followed by the text 'Congratulations!' and 'This legal entity can now be used on new invoices.' Below this, there is a yellow box containing the text: 'Once you are invited to do business on the Cognia 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.' At the bottom, there are buttons for 'Go to Orders', 'Go to Invoices', 'Return to Address', and 'Done'.

Further Help and Guidance

If you require further help or guidance with this section, please see the resources below:

- Our FAQs
- FT Supplier Webpage
- [Coupa Supplier Help Centre](#)
- [Invoicing - Help](#)
- From the [CSP homepage](#), you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

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Submitting Invoices

Submitting Invoices in the CSP

Invoices can be submitted directly through the CSP for all U.K. based suppliers. Invoices created via Coupa are legally compliant electronic invoices. For suppliers outside the U.K. a PDF invoice needs to be uploaded to the PO. The PDF invoice will become the legally compliant invoice for payment.

Coupa reviews and implements invoice under all applicable laws, going far beyond just tax related requirements.

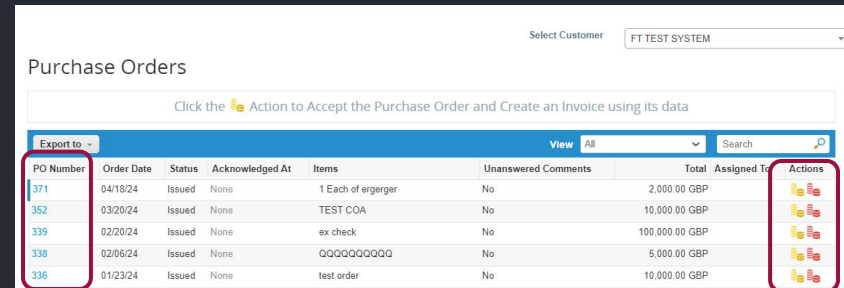
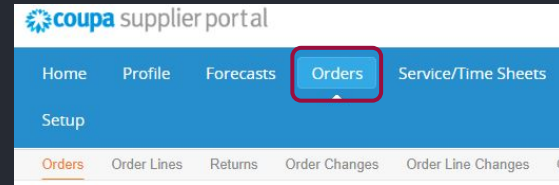
You should not submit invoices by email if they are created and sent to us through the CSP, steps described below.

Step 1:

1. Select the **Orders** tab in the top toolbar.

Tip:

You can create an invoice by either by clicking on the PO number or clicking on the yellow coins in the right-hand side.



The screenshot shows the 'Purchase Orders' page for customer 'FT TEST SYSTEM'. A message says 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. Below is a table of purchase orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The 'PO Number' column and the 'Actions' column (containing yellow coin icons) are highlighted with red boxes.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
371	04/18/24	Issued	None	1 Each of ergerger	No	2,000.00 GBP		
352	03/20/24	Issued	None	TEST COA	No	10,000.00 GBP		
339	02/20/24	Issued	None	ex check	No	100,000.00 GBP		
338	02/06/24	Issued	None	QQQQQQQQQQ	No	5,000.00 GBP		
336	01/23/24	Issued	None	test order	No	10,000.00 GBP		

Submitting Invoices in the CSP

Step 2:

In the PO view, scroll to the bottom of the page and select **Create Invoice**.

This will take you to the Create Invoice page. Some fields will be automatically populated from the PO, but there there will be further fields to complete.

1: Your supplier details have been populated from your invoicing setup.

2: Please leave the Cash Accounting Scheme and Margin Scheme fields blank.

Please note: Mandatory fields are marked with a red asterisk.

The screenshot shows the 'Create Invoice' form with the following details:

- Buttons:** 'Create Invoice', 'Save', 'Print View'.
- General Info:**
 - * Invoice #
 - * Invoice Date: 04/23/24
 - Payment Term: EOM 30
 - Date of Supply: 04/23/24
 - * Currency: GBP
 - Delivery Number
 - Status: Draft
 - Image Scan: Choose File (No file chosen)
 - Supplier Note
 - Attachments: Add File | URL | Text
 - Cash Accounting Scheme
 - Margin Scheme
- From:**
 - * Supplier: FT TEST SUPPLIER
 - * Supplier VAT ID: GB867586757
 - * Invoice From Address: TEST UK, the strand, SSS ytu, United Kingdom, LTD
 - * Remit-To Address: TEST UK, 2, the strand, SSS ytu, United Kingdom
 - * Ship From Address: TEST UK, 2, the strand, SSS ytu, United Kingdom
- To:**
 - Customer: FT TEST SYSTEM
 - * Bill To Address: 37 Upgrade street, 37 Upgrade street2, San Mateo, 11111, United States
 - * Buyer Tax ID
 - Ship to Address: JA TEST, JA TEST, JA TEST, United Kingdom

Submitting Invoices in the CSP

Step 3:

Scroll to see the items you are looking to invoice against.

1: The quantity and price can be amended. Remove an item from the invoice by clicking on the red cross.

2: Please include a VAT rate for each PO line.

3: When you have completed all fields, select **Calculate**. This will calculate the total value of the invoice.

You can **Save** the invoice as a draft, **Delete** or select **Submit** if you want to proceed with the invoice.

4: When you select **Submit**, a pop up window will appear, select **Send Invoice** to continue.

You can now view the newly submitted invoice in the Invoices tab.

The screenshot shows the 'Lines' section of the Coupa interface. At the top, there is a table with columns: Type, Description, Qty, UOM, Price. The 'Qty' field is set to 1 and the 'Price' field is set to 2,000.00. A red box with a '1' and a red cross icon is positioned over the 'Price' field. Below this, there are fields for PO Line (371-1), Service/Time Sheet Line (None), Contract, and Supplier Part Number. A red box with a '1' is positioned over the Supplier Part Number field. Further down, there are fields for UNSPSC, Billing Note, and Billing (129950-AAK040-0-OP0009). A 'Taxes' section contains a 'VAT Rate' dropdown menu and a 'VAT Amount' field set to 0.00. A red box with a '2' is positioned over the VAT Rate field. To the right, a 'Totals & Taxes' summary table is displayed:

Totals & Taxes	
Lines Net Total	2,000.00
Lines VAT Totals	400.00
Total VAT	400.00
Net Total	2,000.00
Gross Total	2,400.00

At the bottom of the interface, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A red box with a '3' is positioned over the 'Calculate' button. Below the main interface, a blue pop-up window titled 'Are You Ready to Send?' is visible, containing the text: 'Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.' At the bottom of this pop-up, there are buttons for 'Continue Editing' and 'Send Invoice'. A red box with a '3' is positioned over the 'Send Invoice' button.

Further Help and Guidance

If you require further help or guidance with this section, please see the resources below:

- Our FAQs
- FT Supplier Webpage
- [Coupa Supplier Help Centre](#)
- [View and Manage Invoices - Help](#)
- From the [CSP homepage](#), you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

Viewing Invoices & Invoice Status

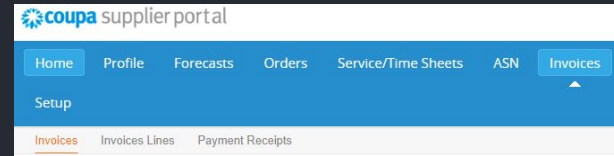
Viewing Invoices in the CSP

Step 1:

In the CSP you can view invoices and their status. From the Home page select the Invoices tab in the toolbar. On the Invoices page you can see a list of invoices you submitted to the FT.

- 1: Select an invoice number number to open an invoice.
- 2: Select **View** to filter invoice view
- 3: Use the **Search** functionality to search for an invoice number.

*Invoice status is displayed in the table of invoices shown after point 1 above. See final slide in this section for further details



Invoices

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to ▾ **View** All Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/23/24	Draft	371	2,000.00 GBP	No		
CODE 1	04/18/24	Pending Approval	371	2,000.00 GBP	No		
TEST CODE	04/11/24	Draft	336	40.00 GBP	No		
345345345345555	03/22/24	Pending Approval	None	120,000.00 GBP	No		

Viewing Invoices in the CSP

Step 2:

You can now view all details in the invoice.

To view the Legal Invoice, select **download** next to it. This will open a pdf version of the VAT Legal invoice, which you can print or save in your local files.

Invoice #CODE 1 [Back](#)

General Info

Invoice # CODE 1
Invoice Date 04/18/24
Payment Term EOM 30
Delivery Date 04/18/24
Currency GBP
Delivery Number None
Status Pending Approval
Shipping Term None
Legal Invoice download
Image Scan None
Supplier Notes None
Attachments None

Bill To & Ship To

Supplier FT TEST SUPPLIER
Invoice From TEST UK
2
the strand
SS5 5JU
United Kingdom
Type of Company LTD

VAT Invoice CODE 1

To
Address 37 Upgrade street
37 Upgrade street2
San Mateo
11111
United States
Buyer VAT ID GB28162332
Attn/Ref Jason Andrew

Ship To JA TEST
JA TEST
JA TEST
JA TEST
United Kingdom

From
Invoice From TEST UK
2
the strand
SS5 5JU
United Kingdom
Supplier VAT ID GB967586757

Supplier Details
Type of Company LTD

Invoice Details

Invoice Number	Invoice Date	Payment Term	Payment Due Date
CODE 1	18 April 2024	EOM 30	30 May 2024
Currency	Contract Number	Date of Supply	
GBP		18 April 2024	
Discount Due Date	30 April 2024		

Item	PO	Description	Supplier part number	Quantity	Units	Price per unit (excl. VAT)	Total VAT Amount (in GBP)	VAT Rate	Rate	Exemption Type	Reason	Taxable Amount
1	371	ergogear		1	Each	2,000.00 GBP	0.00 GBP	Exempt	VAT	N/A		2,000.00 GBP

Taxes

Taxable Amount Charged	Per Rate	Total Tax Per Rate
2,000.00 GBP at VAT (Exempt)		0.00 GBP

Totals

Taxable Amount	2,000.00 GBP
Net Total	2,000.00 GBP
Tax Amount	0.00 GBP
Gross Total	2,000.00 GBP

Invoice Statuses

Step 3:

Invoices could show the following in the status column.

Draft: When an invoice has been created but not submitted

Pending Approval : When an invoice has been created and submitted for approval

Approved: This status will show when the invoice has been approved and when payment is due this will be paid

Disputed: If you see this status, then the FT is flagging a discrepancy on the invoice submitted. The reason for dispute will be displayed in the column 'Dispute Reason'. Please open the invoice that is being disputed for details of the reason for dispute.

At the bottom of the invoice will be a reason for dispute, an example of which is shown in the screenshot opposite.

Invoices

Create Invoices ⓘ


Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/23/24	Draft	371	2,000.00 GBP	No		 
CODE 1	04/18/24	Pending Approval	371	2,000.00 GBP	No		
TEST CODE	04/11/24	Draft	336	40.00 GBP	No		 
34534534534555	03/22/24	Pending Approval	None	120,000.00 GBP	No		

Invoices

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
Ontoinv40001	19/08/2024	Disputed	None	6,000.00 BGN	Yes	Invalid or missing PO reference	

Participants: Jon TEST

to supplier

 Jon TEST

disputed on 19/08/2024 at 11:55

Please ensure the invoice is issued to Financial Times UK Ltd

Invoice Statuses

Step 4:

To view which invoices have been paid:

On the invoices tab, choose 'Payment information' under the 'View' dropdown.

The full list of invoices will be displayed, and the first column will indicate whether the invoice has been paid or not.

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View Payment Information Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	None	TESTCHAIN	Pending Approval	03/10/2024	Net 30	03/10/2024	
No	None	None	Draft	06/09/2024	Net 30	06/09/2024	
No	None	Ontoinv40001	Disputed	19/08/2024	EOM 30	19/08/2024	
No	GBR0001023	Ontoinv30003	Draft	19/08/2024	Net 30	19/08/2024	
No	GBR0001023	Ontoinv30003	Disputed	19/08/2024	Net 30	19/08/2024	
No	GBR0001024	Ontoinv30002	Approved	19/08/2024	Net 30	19/08/2024	
No	GBR0001027	Ontoinv30001	Approved	16/08/2024	Net 30	19/08/2024	
Yes	GBR0001040	240813143825	Approved	13/08/2024	Net 30	13/08/2024	Payment# - on - for -
No	GBR0001022	Ontoinv1000	Pending Approval	13/08/2024	Net 30	13/08/2024	
No	105	None	Draft	05/12/2022	None	05/12/2022	

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Further help and support

If you are unable to find answers to your questions within these guides you can refer to:

- [FT Supplier Webpage](https://aboutus.ft.com/suppliers), which includes FAQs and other supporting information: aboutus.ft.com/suppliers
- You can contact our Procure-to-Pay Operations team at p2p@ft.com

Or if you require technical assistance with Coupa you can refer to:

- [Coupa Supplier Help Centre](#)
- [Coupa Compass](#) - Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the '[Getting started with the CSP](#)' guide from Coupa
- From the [CSP homepage](#) you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

Glossary of Terms

CSP	Coupa Supplier Portal
Admin	The person with Administration rights for the Coupa Supplier Portal for your account
Financial Times business contact	The Financial Times employee you have been discussing supply of goods and/or services
PO	Purchase Order
Users	Your employees who have access to the Coupa Supplier Portal
Invitation	There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date>. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.
Coupa Compass	This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help
Supplier Information Form	This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP