



The Financial Times

Coupa Supplier Portal User Guide



Invoicing

Contents

- Setting up e-invoicing (available to UK Suppliers only at this time)
- 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

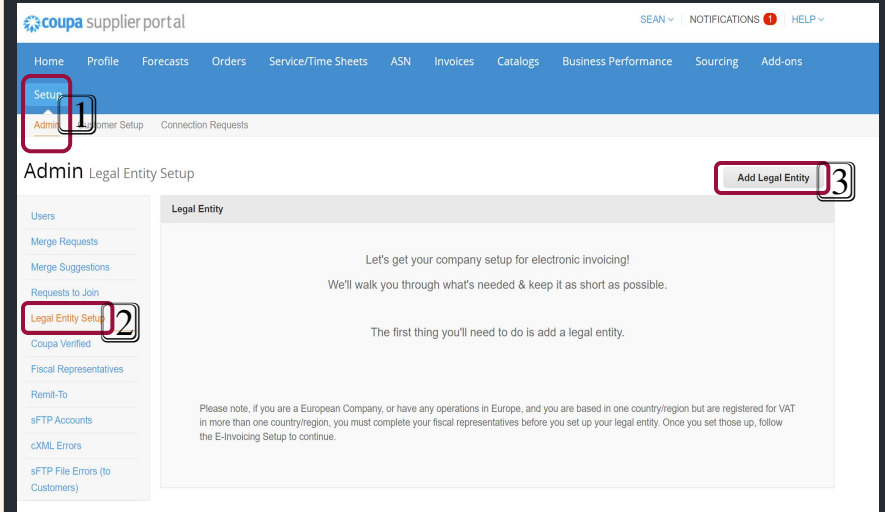
Step 1:

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**.



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 sequential screenshots of the Coupa setup interface. The top screenshot, titled "Where's your business located?", features a yellow informational banner and a form with two mandatory fields: "Legal Entity Name" and "Country/Region". A red box highlights these fields, and a "Continue" button is visible at the bottom right. The bottom screenshot, titled "Miscellaneous Information", also has a yellow banner and a form with four fields: "Legal Entity Name" (pre-filled with "Baringa"), "Country/Region" (pre-filled with "United Kingdom"), "Type of Company", and "Board of Directors". A red box highlights the first three fields, and a "Save & Continue" button is at the bottom right. Both dialogs include a "Cancel" button and a progress indicator at the top.

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 displays the 'Invoicing' setup interface. At the top, a progress bar shows steps 1, 2, 3, and 4, with step 3 being the current active step. The main heading is 'Which customers do you want to see this?'. Below this, the section 'What address do you invoice from?' contains several fields: 'Address Line 1', 'City', 'State' (a dropdown menu), 'Postal Code', and 'Country/Region' (set to 'United Kingdom'). A red box labeled '1' encompasses the 'Address Line 1' through 'Postal Code' fields. Below these, two checkboxes are present: 'Use this address for Remit-To' and 'Use this for Ship From address', both of which are checked. A red box labeled '2' highlights these two checkboxes. To the right of the address fields is a blue box titled 'REQUIRED FOR INVOICING' with explanatory text. The next section, 'What is your Tax ID?', includes a 'Country/Region' dropdown (set to 'United Kingdom') and a 'VAT ID' field. A red box labeled '3' highlights the 'Country/Region' and 'VAT ID' fields. Below the 'VAT ID' field is a checkbox for 'I don't have a VAT/GST Number'. At the bottom of this section is a link 'Add additional Tax ID'. The final section, 'Miscellaneous', contains an 'Invoice From Code' field and a 'Preferred Language' dropdown (set to 'English (UK)'). A red box labeled '4' highlights the 'Invoice From Code' field. At the bottom right of the form are 'Cancel' and 'Save & Continue' buttons.

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 of the CSP (Customer Supplier Portal) setup process for invoicing.

Screenshot 1: "Where do you want to receive payment?"
This screen shows the "Remit-To" address setup. It includes a progress indicator with steps 1, 2, 3, and 4, where step 1 is highlighted. Below the progress bar, there is a table with columns: "Remit-To Account", "Remit-To Address", and "Status". The table contains one entry with the address "62 Buckingham Gate, London, SW1E 6AJ, United Kingdom" and a status of "Active". A "Manage" button is next to the entry. At the bottom, there are buttons for "Deactivate Legal Entity", "Cancel", and "Next".

Screenshot 2: "Where do you ship goods from?"
This screen shows the "Ship From" address setup. It includes a progress indicator with steps 1, 2, 3, and 4, where step 2 is highlighted. Below the progress bar, there is a table with columns: "Title", "Status", and "Address". The table contains one entry with the address "62 Buckingham Gate, London, SW1E 6AJ, United Kingdom" and a status of "Active". A "Manage" button is next to the entry. At the bottom, there are buttons for "Deactivate Legal Entity" and "Done".

Screenshot 3: "Setup Complete"
This screen shows the final confirmation message. It features a large green checkmark and the text "Congratulations!". Below this, it states "This legal entity can now be used on new invoices." and provides instructions on how to use the information on the CSP Supplier Portal. 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.

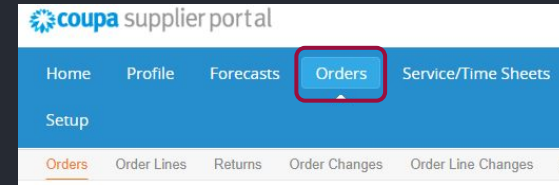
You should not submit invoices by email if they are created and sent to us through the CSP, steps described below.

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.



Select Customer

FT TEST SYSTEM

Purchase Orders

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to	View All							Search
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 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.

Create Invoice Create

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 GB667586757

* Invoice From Address TEST UK
2 the strand
SS5 ytu
United Kingdom
LTD

* Remit-To Address TEST UK
2 the strand
SS5 ytu
United Kingdom

* Ship From Address TEST UK
2 the strand
SS5 ytu
United Kingdom

To

Customer FT TEST SYSTEM

* Bill To Address 37 Upgrade street
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 displays the 'Lines' form in the Coupa system. The form is divided into several sections: 'Type', 'Description', 'Qty', 'UOM', 'Price', 'PO Line', 'Service/Time Sheet Line', 'Contract', 'Supplier Part Number', 'UNSPSC', 'Billing Note', 'Billing', 'Taxes', and 'Totals & Taxes'. The 'Qty' field is set to 1, and the 'Price' field is set to 2,000.00. The 'PO Line' field is set to 371-1. The 'Service/Time Sheet Line' field is set to None. The 'Contract' field is set to None. The 'Supplier Part Number' field is empty. The 'UNSPSC' field is empty. The 'Billing Note' field is empty. The 'Billing' field is set to 129950-AAK040-0-OP0009. The 'Taxes' section shows a 'VAT Rate' dropdown menu and a 'VAT Amount' field set to 0.00. The 'Totals & Taxes' section shows the following values: Lines Net Total (2,000.00), Lines VAT Totals (400.00), Total VAT (400.00), Net Total (2,000.00), and Gross Total (2,400.00). At the bottom of the form, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A blue confirmation dialog titled 'Are You Ready to Send?' is open, asking the user to confirm the invoice creation. The dialog includes 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.' and two buttons: 'Continue Editing' and 'Send Invoice'.

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

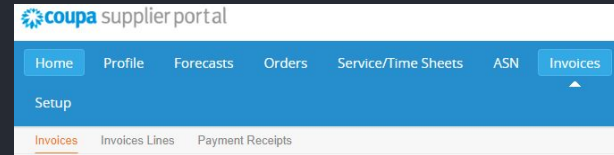
Viewing Invoices in the CSP

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 ▾ **2** View All **3** 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 04/10/24

Payment Term EOM 30

Delivery Date 04/10/24

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

From

Invoice From TEST UK

2

the strand

SS5 5JU

United Kingdom

Supplier VAT ID GB967586757

Address 37 Upgrade street

Ship To JA TEST

37 Upgrade street2

JA TEST

San Mateo

JA TEST

11111

United States

United Kingdom

Buyer VAT ID GB026162332

Attn/Ref Jason Andrew

Supplier Details

Type of Company LTD

Invoice Details

Invoice Number CODE 1

Invoice Date 18 April 2024

Payment Term EOM 30

Payment Due Date 30 May 2024

Currency GBP

Contract Number

Date of Supply 18 April 2024

Discount Due Date 30 April 2024

Item	PO	Description	Supplier part number	Quantity	Unit	Price per unit (excl. VAT)	Total VAT Amount (in GBP)	VAT Rate	Exemption Reason	Taxable Amount
1	371	ergonomer		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

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			

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 #	Gross Total	Unanswered Comments	Dispute reason	Actions	
Ontario40001	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, 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