

# **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)

#### **Legal Entity Set-up**

#### **I** 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).

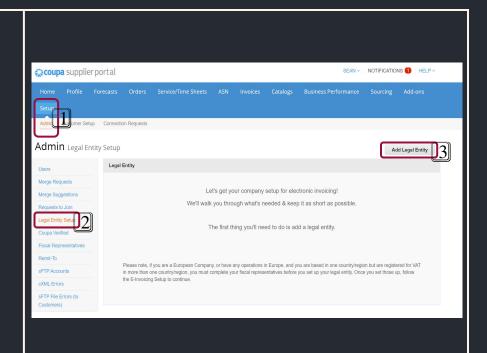
For suppliers outside the UK - Please note that you would need to attach PDF of the invoice to the PO for payment. The PDF invoice will be the legal invoice for payment.



#### Step 1:

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

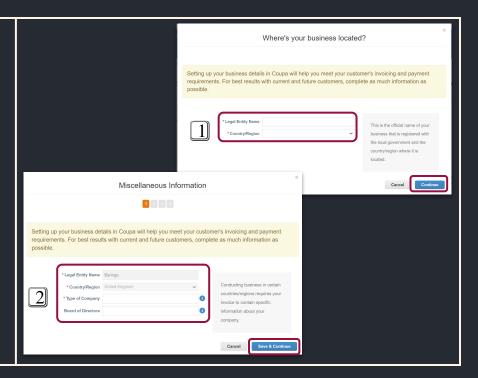
- 1: Select **Setup** in the toolbar, select the **Admin tab.**
- 2: Select **Legal Entity Setup**.
- 3: Select Add Legal Entity.





#### Step 2:

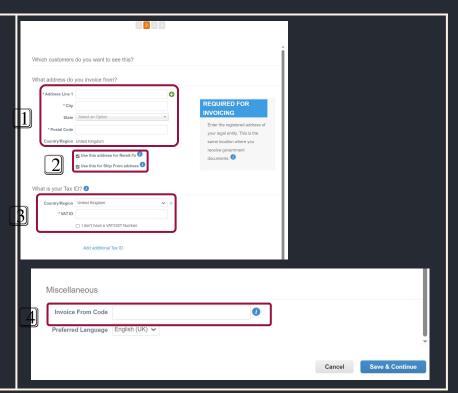
- 1: A pop up will appear prompting you to add the **Legal Entity Name** and the **Country/Region** where it is registered, enter your details and select **Continue**.
- 2: You will be prompted to add further Miscellaneous Information. Once all mandatory fields are complete, select **Save & Continue**.





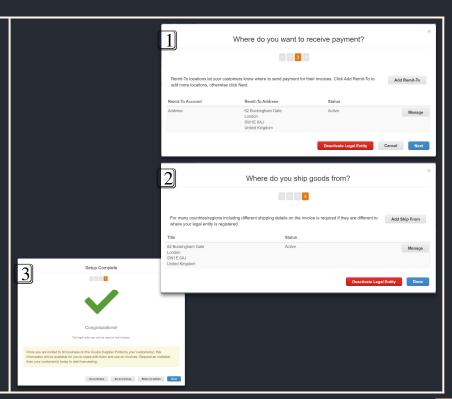
### Step 3: You will be prompted to complete further company information in the pop up window. 1: Add your e-invoicing address 2: Leave these boxes ticked if your Remit-To and Ship From address remain as above 3: Enter your VAT ID 4: Add your Invoice From Code - this is the same as in your ERP System

Once complete select Save & Continue.



#### 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.**





### 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
- <u>Invoicing Help</u>
- From the <u>CSP homepage</u>, you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

## **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.

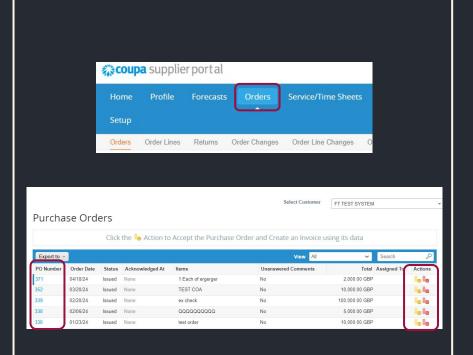
You should not submit invoices by email if they are created and sent to us through the CSP, steps described below.

#### 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.



### **Submitting Invoices in the CSP**

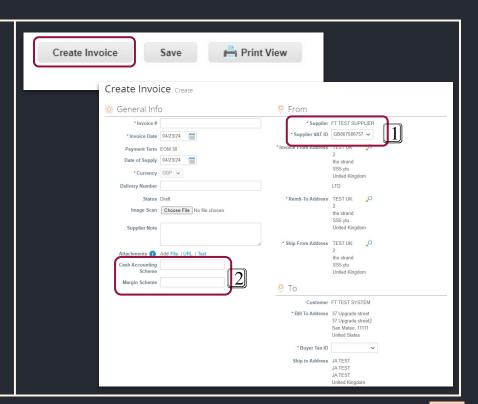
#### Step 2:

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.





### **Submitting Invoices in the CSP**

#### Step 3:

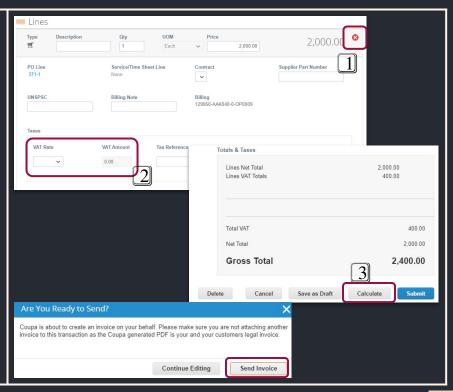
Scroll to see the items you are looking to invoice against.

- 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.





### 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 <u>CSP homepage</u>, you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

**Viewing Invoices & Invoice Status** 

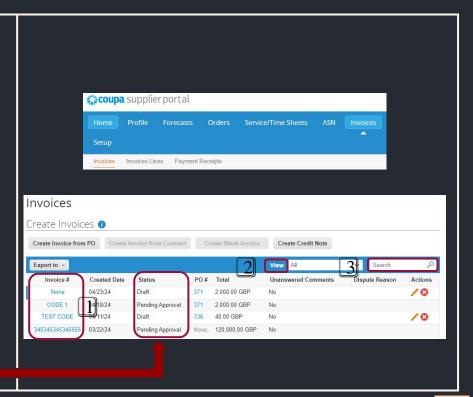
### Viewing Invoices in the CSP

#### 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



### Viewing Invoices in the CSP

#### Invoice #CODE 1 Back Step 2: **⊘** GB General Info Bill To & Ship To Supplier FT TEST SUPPLIER You can now view all details in the invoice. Invoice Date 04/18/24 Invoice From TEST UK Payment Term EOM 30 Delivery Date 04/18/24 SS5 vtu United Kingdom To view the Legal Invoice, select download next to it. This will Delivery Number None Type of Company LTD open a pdf version of the VAT Legal invoice, which you can print or Status Pending Approval **VAT Invoice** save in your local files. Supplier Notes None Invoice From TEST UK 37 Upgrade street JA TEST 37 Upgrade street2 the strand SS5 ytu JA TEST United Kingdom United States United Kingdom Buyer VAT ID GB226162332 Supplier Details Invoice Details CODE 1 18 April 2024



2,000.00 GBP

Total Tax Per Rate

2,000.00 GBP 0.00 GBP 2.000.00 GBP

Payment Due Date 30 May 2024

2 000 00 GBP

Not Total

Tayahla Amount Charned Par Rate

### Invoice Statuses

#### Step 3:

Invoices could show the following in the status column.

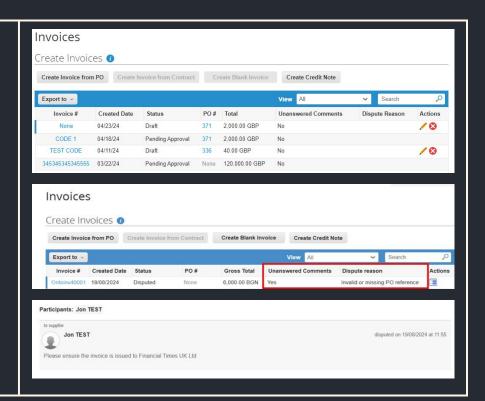
**Draft:** When an invoice has been created but not submitted

**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.





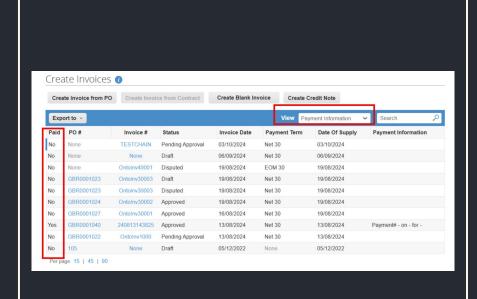
### **Invoice Statuses**

#### 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.



### 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
- <u>Coupa Compass</u> 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 <u>CSP homepage</u> 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
РО	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.</insert>
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