CSP Legal Entity/Remit-to Setup

Please follow the below steps to create a Legal Entity or Remit-to Address within your CSP Account. This is required for *every* Supplier to transact through Coupa. FYI – this is *not* done within the Invoice screen, but within your CSP Business Profile.

STEPS:

- 1. Go to Business Profile > Legal Entities > Create
- 2. Follow the steps to create, then Save

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Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	n Customers	<u> </u>	
Legal Entity Name	Invoice From Address	Tax ID None	Linked Payment Method	Payment Information	n Customers None	~	U.
Legal Entity Name	Invoice From Address 123 Main St, Example, CH, 12345, United	Tax ID None	Linked Payment Method	Payment Information 123 Main St, Example, CH, 12345, United	n Customers None	~	U.
Legal Entity Name	Invoice From Address 123 Main St, Example, CH, 12345, United States	Tax ID None	Linked Payment Method	Payment Information 123 Main St, Example, CH, 12345, United	None		
Legal Entity Name Test Entity #2 Tool Entity #1	Invoice From Address 123 Main St, Example, CH, 12345, United States 123 Main St, Example	Tax ID None	Linked Payment Method Check	Payment Information 123 Main St, Example, CH, 12345, United	None	wities Test Cleanus	tor Analys
Legal Entity Name Test Entity #2 Test Entity #1	Invoice From Address 123 Main St, Example, CH, 12345, United States 123 Main St, Example, Illinois, 12345, United	Tax ID None US:123456789	Linked Payment Method Check Check	Payment Information 123 Main St, Example, CH, 12345, United 123 Main St, Example, Illinois, 12345, United	Customers None Foghorn Therape +21 More	eutics - Test, Cleanwa	ter Analy
Legal Entity Name Test Entity #2 Test Entity #1	Invoice From Address 123 Main St, Example, CH, 12345, United States 123 Main St, Example, Illinois, 12345, United States	Tax ID None US:123456789	Linked Payment Method Check Check	Payment Information 123 Main St, Example, CH, 12345, United 123 Main St, Example, Illinois, 12345, United	None Foghorn Therape +21 More	eutics - Test, Clearwa	ter Analy

- 3. Then go to Setup > Payment Methods
 - If you have a Payment Method already, then click the little
 - If you don't have a Payment Method, then click "Add"

"plug" icon

nvoices Order	rs Business Profile I	Payments Service	e Sheets ASN	Sourcing	Forecasts Catalogs S	etup More	
Admin Connection Re	quests						
dmin Remit-To							
	Add Deserve Method				Mour All	Saarah	(
Users	Add Payment Method				View All	Search	_
Worker Portal Access	Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Status	Actions	3
Merge Requests	None	123 Main St	Check	Test Entity	None		
Merge Suggestions		Example		#2		-	
Requests to Join		12345					
Fiscal Representatives		United States					
Payment Mathods		Preferred Language: English					
		(US)					
Information	None	123 Main St	Check	Test Entity	Alarm.com - Test Supplier	Active 💋	C
Farly Pay Discounts		Example IL		#1	Aspen Technology, Inc BF Test	Active	
aETD Accounts		12345 United States			8/17 3 Aspen Technology, Inc Test BF	Activo	
SFTP Accounts		United States			11/16 Asnon Technology Inc. Test	Active	
cXML Errors		Preferred Language: English			Supplier	Active	
sFTP File Errors (to		(US)			Clearwater Analytics - Test Supplier	Active	
Customers)					See all 23 custo	mers	

- 4. Once the Payment Method is created, then you will need to make sure that "Kirkland & Ellis LLP" is an available customer for that Remit-to Address
 - Once selected, you will see your Company name appear on the bottom of the Pop-up

Add Payn	ent Method	View All	
	Edit Remit-7	To Usage	
Legal Entity	Test Entity #1		
Remit-To	123 Main St, Example, Illinois, 12345, United	States	
	123 Main St Example, IL, 12345 United States		
Which customers can use	this account?		
Add Additional Customers	Kirkland & Ellis LLP		Add Selected
	Denotes customers using Coupa Pay. Ren successfully validated if the customer has cho	nit-to Account details will be shared with the custon sen to send payments for those account types thro	ner when they have been ugh Coupa Pay.
Customer	Status	Date added	
Kirkland & Ellis LLP 💼	Active	04/29/25	8
Back			Next

5. Now when you go to submit an Invoice to Kirkland & Ellis the Remit-to, Ship-to, Invoice From fields should all auto-populate by default