

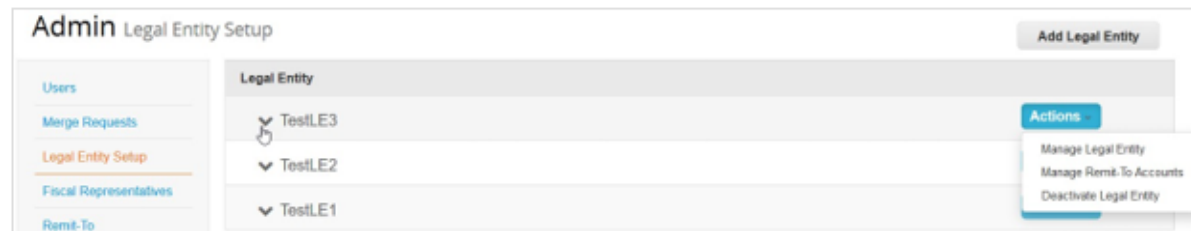


# Legal Entity Set-up

## How to set-up your legal entity in your CSP

This guide will help you to create your legal entity in your Coupa supplier portal (CSP) you will need the following information. You will need to have a legal entity set-up before you can invoice Mitie. Coupa will require 2 Factor-authentication to be set-up to create/ manage your legal entity.

- Your company address.
- Bank & Remit-To Details
- VAT/ Tax registration number (UTR number for UK sole traders)
- Ship from addresses (If shipping from country to country)



If you have three or more legal entities, they are collapsed. To view their details, click on the Down arrows.

Each legal entity has the following sections:

- Invoice From
- Remit-To Accounts – Can be of type: Address, Bank Account, or Virtual Card.
- Locations
- Customers – The name(s) and number of customers that you provided with the specific legal entity are also shown. Hovering your cursor over customers displays the name(s) of the customer(s) associated with the legal entity.

Mitie use's Coupa for suppliers to invoice Mitie. "This How to Document" assumes the supplier is already onboarded and have a Coupa supplier portal log-in.

It is recommended that you have one legal entity setup in your CSP account for Mitie, multiple Legal entities attached to the same customer will not default your Remit to details on while creating your Invoice and won't match Mitie's supplier master records.

1.

### How to set-up your legal entity in your CSP.

You can set up your account to create electronic invoices from the Admin > Legal Entity Setup page. You can add, manage, or deactivate legal entities, or manage remit-to accounts.

You can provide more remit-to accounts and add this information to your legal entities so that your customers can use different payment methods when working with you.

For setting up your legal entity you will require the following

1. Your company address.
2. Bank & Remit-To Details
3. VAT/ Tax registration number (UTR number for UK sole traders)
4. Ship from addresses (If shipping from country to country)

You will be required to enter you 2 factor authentication (2FA) code or set up 2FA to be able to set-up your legal entity.

Guide to 2FA <https://mitiesuppliers.com/wp-content/uploads/How-to-set-up-Two-factor-Authentication.pdf>

2.

Below is a link to the Coupa Supplier Portal (CSP) where you can log into Coupa or Register. Please be aware that the email address for registering your CSP account must be the same as the one that the CSP invite was sent to

Log into Coupa using

URL <https://supplier.coupahost.com/sessions/new>

**Login**

\* Email

\* Password

Login

New to Coupa? **CREATE AN ACCOUNT**

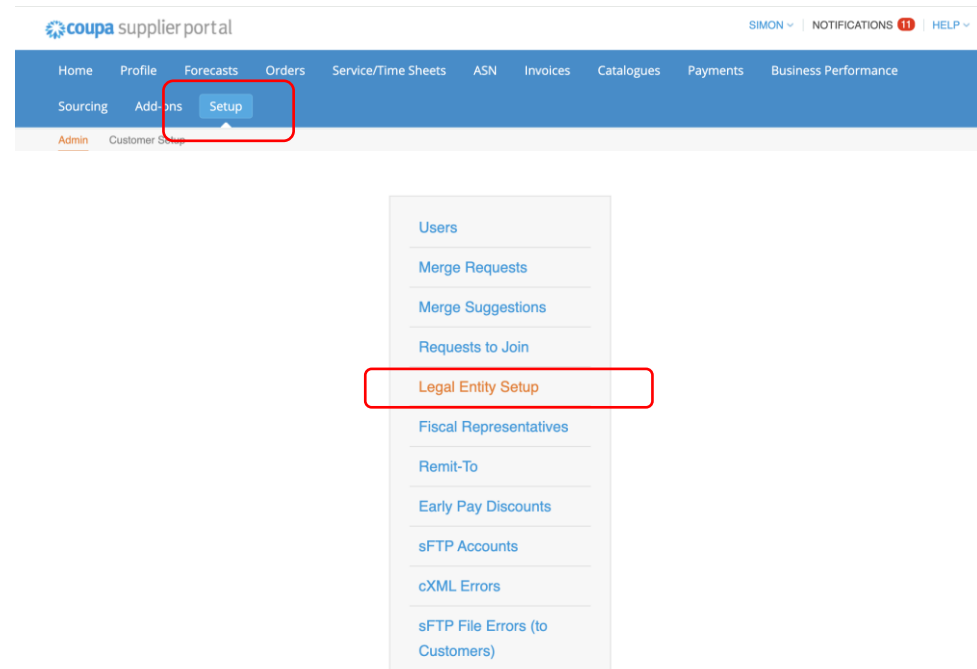
[Forgot your password?](#)

3.

You must set up your organisation's Legal Entity. To do this, click 'Setup' in the big blue bar

Then

Click 'Legal Entity Setup' on the left hand side

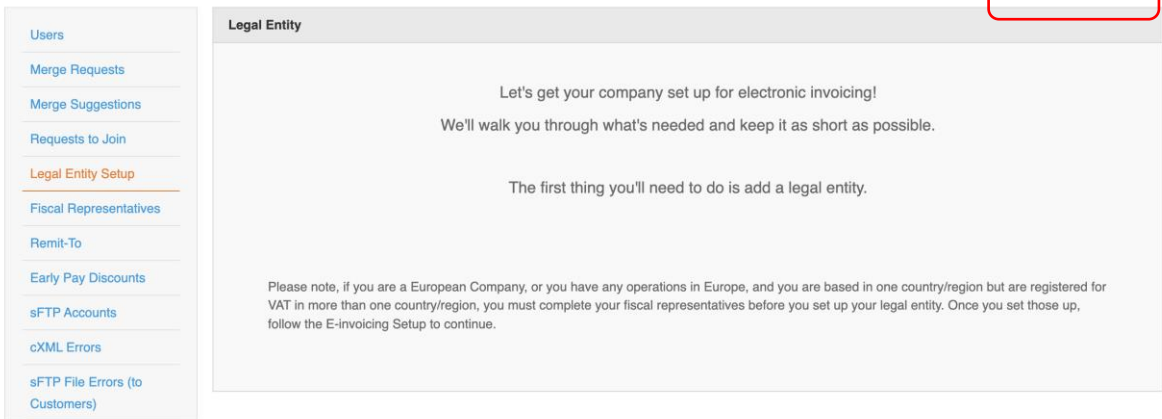


4.

The Legal Entity set-up page shows  
Click 'Add Legal Entity' button

If your screen show you already have Legal entity / Entities set-up, please check the details and deactivate legal entities before adding a new one.

#### Admin Legal Entity Setup



5.

### 'Where your business located?'

The Legal Entity name must be the registered company name and must be written in exactly the same as the registered format on which you receive your government documents (eg Ltd or Limited) .

Select Country/ Region as this will determine the required information required.

Click "Continue"

Note: Depending on the country/region selected the required information may differ and won't be the same as the screen shots in this guide.

The screenshot shows a web form titled "Where's your business located?". At the top, there is a yellow informational box with the text: "Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible." Below this, there are two required fields: "\* Legal Entity Name" (a text input field) and "\* Country/Region" (a dropdown menu). To the right of these fields is a grey box containing the text: "This is the official name of your business that is registered with the local government and the country/region where it is located." At the bottom right of the form, there are two buttons: "Cancel" and "Continue". At the very bottom of the screenshot, there is a small text link: "follow the E-invoicing Setup to continue."

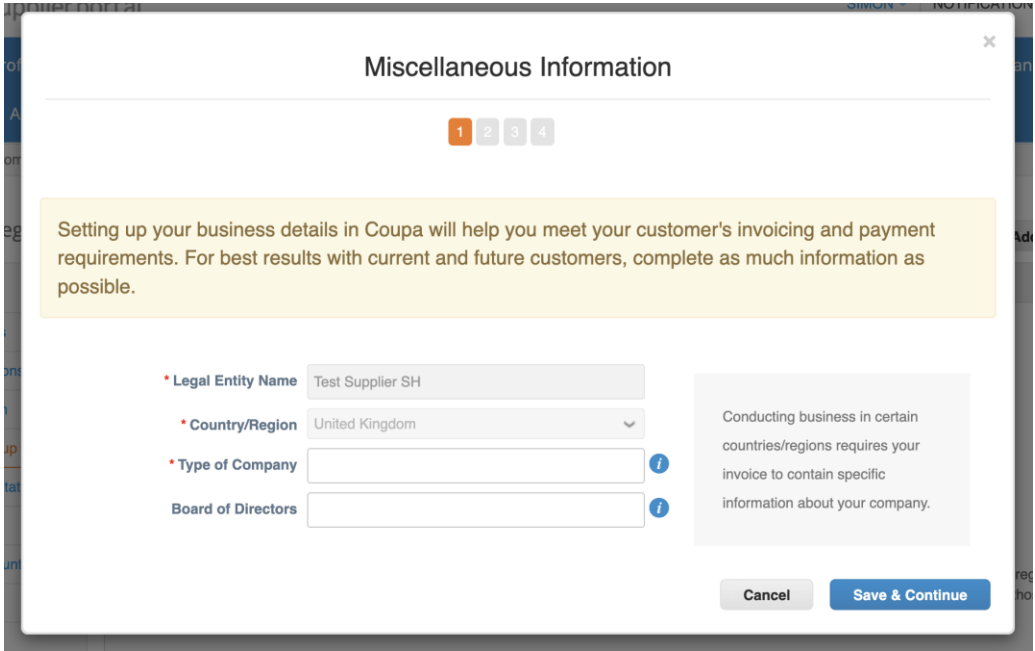
6.

**‘The Miscellaneous Information screen’**

Legal Entity Name and Country/ Region have defaulted from the previous screen

Complete the company type (i.e. Limited, PLC, Sole Trader, Charity etc ) and other information if appropriate.

Board of Directors is not required.



7.

**‘Tell your customers about your organisation’**

Which customers do you want to see this?

Select the customers you want to be linked to your legal entity, click all if all

Which customers do you want to see this?

- All
- Mitie Group Plc - Vodafone PLC Test Site 
- Mitie Group Plc - Filmtek Ltd 
- Mitie Group Plc - Test Supplier SH 
- Mitie Group Plc - Test Supplier SH 
- Mitie Group Plc - SRCL LTD\_0000601291 

8.


**‘What address do you invoice from?’**

Enter the registered address of your legal entity. This is the same location as where you receive government documents. Ensuring you select a State.

Please Note:

The Invoice From address will be included on invoices and is critical for compliance in some countries/regions. If you have a simple company structure, you'll probably use this as your Remit-To and Ship From location as well. Otherwise, untick the boxes to provide a separate address for those.

What address do you invoice from?


\* Address Line 1  

\* City


State

\* Post Code

Country/Region

- Use this address for Remit To 
- Use this for Ship-From address 

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location as where you receive government documents. 

9.

**‘What is your tax ID?’**

Please enter your Tax/ VAT code associated with the selected country starting with the country prefix and no spaces e.g:


- GB123456789
- FR12345678901
- DE123456789

If you have more than one Tax/ VAT code you can add additional Tax ID click on

[Add additional Tax ID](#)

Please note when creating an invoice in Coupa you will have to remember to select the relevant Tax/Vat code from the supplier tax number field as this can cause tax issues






What is your Tax ID? 

Country/Region  

\* VAT ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

|  |   |
|--|---|
| <p>If your organisation is exempt from tax registration in some countries/ regions please select box 'I do not have a VAT/GST Number' and another field will open up below against which you must capture either a Unique Tax Reference (UTR) registered with your local government or write N/A in the appearing <b>Local Tax ID</b> field.</p> | <p>What is your Tax ID? </p> <hr/> <p>Country/Region <input type="text" value="United Kingdom"/>  </p> <p>VAT ID <input type="text"/></p> <p><input checked="" type="checkbox"/> I don't have a VAT/GST Number</p> <p>* Local Tax ID <input type="text"/></p> <hr/> <p><a href="#">Add additional Tax ID</a></p> |
| <p><b>10.</b></p> <p><b>'Miscellaneous'</b></p> <p>Invoice-From Code:<br/>Use this field to tie your CSP invoice from address (i.e. registered address) with the corresponding address in your ERP. <b>Note: It is not mandatory that this is completed.</b></p> <p>Preferred Language:<br/>select your preference.</p>                          | <p>Miscellaneous</p> <hr/> <p>Invoice-From Code <input type="text"/> </p> <p>Preferred Language <input type="text" value="English (UK)"/> </p>  |

11.

**'Where do you want to receive payment?'**

Payment Type: click on the dropdown and select **Bank Account**

The screenshot shows a web form titled "Where do you want to receive payment?". At the top, there are four numbered steps: 1, 2, 3 (highlighted in orange), and 4. Below the steps is a dropdown menu labeled "\* Payment Type" with "Address" selected. A red rectangular box highlights this dropdown menu. Below the dropdown is the question "What is your Remit-To Address?". The form contains the following fields:

- Address Line 1: Test Street
- City: London
- State: London
- Post Code: SE1 9SG
- Country/Region: United Kingdom

At the bottom right, there are two buttons: "Cancel" and "Save & Continue".



12.

## 'Where do you want to receive payment?' continued

Complete this form with the relevant and accurate information for your company.

- Bank Name
- Account number.
- Sort code (no dashes or spaces)

When you select the Bank account country/region the required information may change.

If you do not have a swift number tick the box 'My company does not have a BIC code'

If you are an international organisation you are encouraged to complete your IBAN number

Click 'Save and Continue'

Note: Depending on the country/region selected the required information may differ and won't be the same as the screen shots in this guide.

The screenshot shows a web form titled "Where do you want to receive payment?". At the top, there are four numbered steps: 1, 2, 3 (highlighted in orange), and 4. Below the title, the "Payment Type" is set to "Bank Account". The main section is titled "What are your Bank Account Details?". It contains several fields: "Bank Account Country/Region" (dropdown menu set to "United Kingdom"), "Bank Account Currency" (dropdown menu set to "GBP"), "Beneficiary Name" (text input field with "Test Supplier SH"), "Bank Name" (text input field), "Account Number" (text input field with an information icon), "Confirm Account Number" (text input field), "Sort Code" (text input field with an information icon), "SWIFT/BIC Code" (text input field with an information icon), a checkbox for "My bank does not have a BIC code", "Branch Code" (text input field), "Bank Account Type" (dropdown menu set to "Business"), "Supporting Documents" (button "Choose files" and text "No file chosen" with an information icon), and "Email Address" (text input field with "simon.hunt@mitie.com" and an information icon). Below this section is a section for "Who is your Remit-To Contact? (optional)" with a right arrow. The next section is "What is your Remit-To Address?", which contains the following information: "Address Line 1" (Test Street), "City" (London), "State" (London), "Post Code" (SE1 9SG), and "Country/Region" (United Kingdom). At the bottom right, there are two buttons: "Cancel" and "Save & Continue".

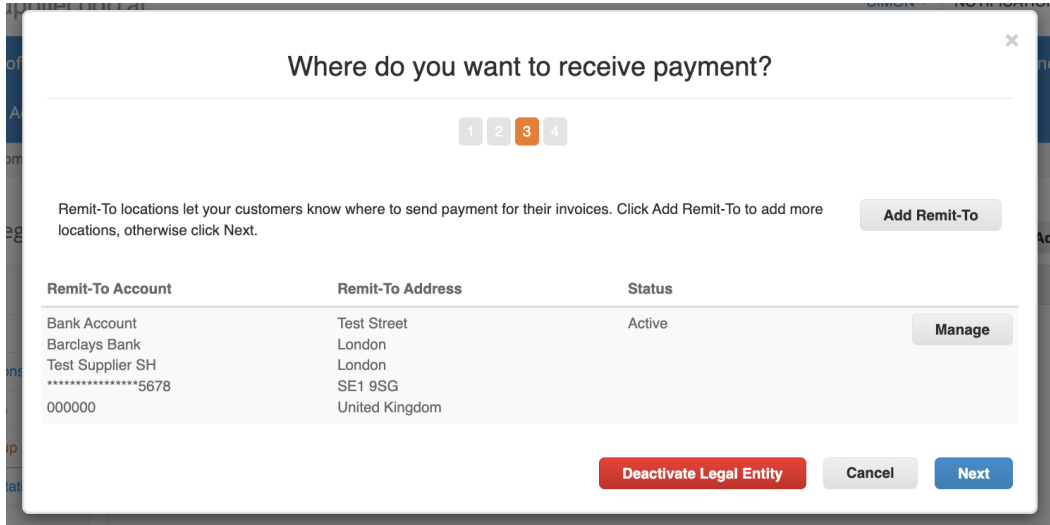
**13.**

**‘Where do you want to receive payment?’ continued**

Mitie can only hold one remit to address per supplier account, it is best to keep the remit to address the same as the registered address.

Coupa validates the supplier remit to address (RTA) must match the RTA on Mitie’s supplier master.

Click ‘Next’



**14.**

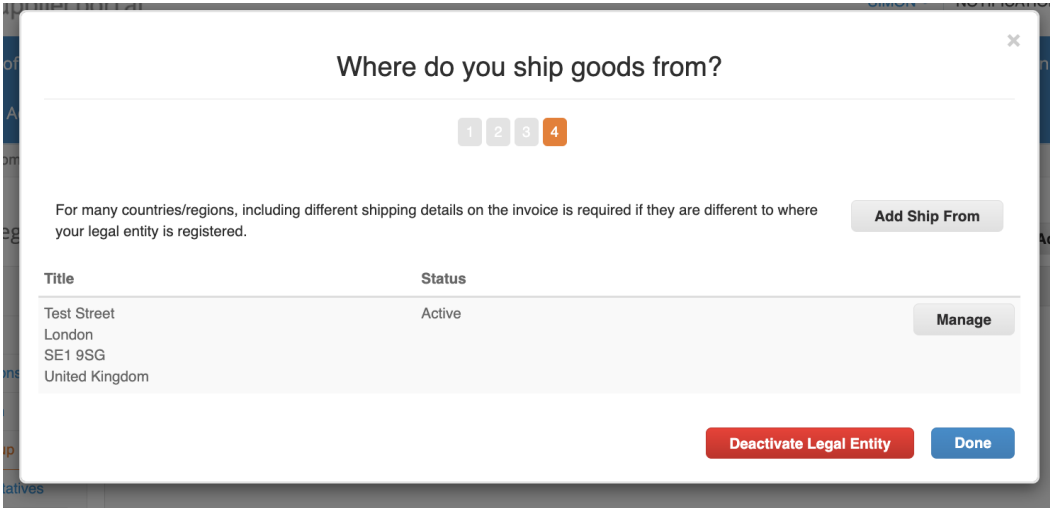
**‘Where do you ship goods from?’**

**If you ship from within the same country where there is not tax implications you can leave the as is and click ‘Done’**

**If you ship goods to a different country, you need to add ship from details**  
**Click ‘add Ship from’ and complete the required information**

Please note when creating an invoice in Coupa you will have to remember to select the relevant ship from address as this can cause tax issues

Click ‘Done’

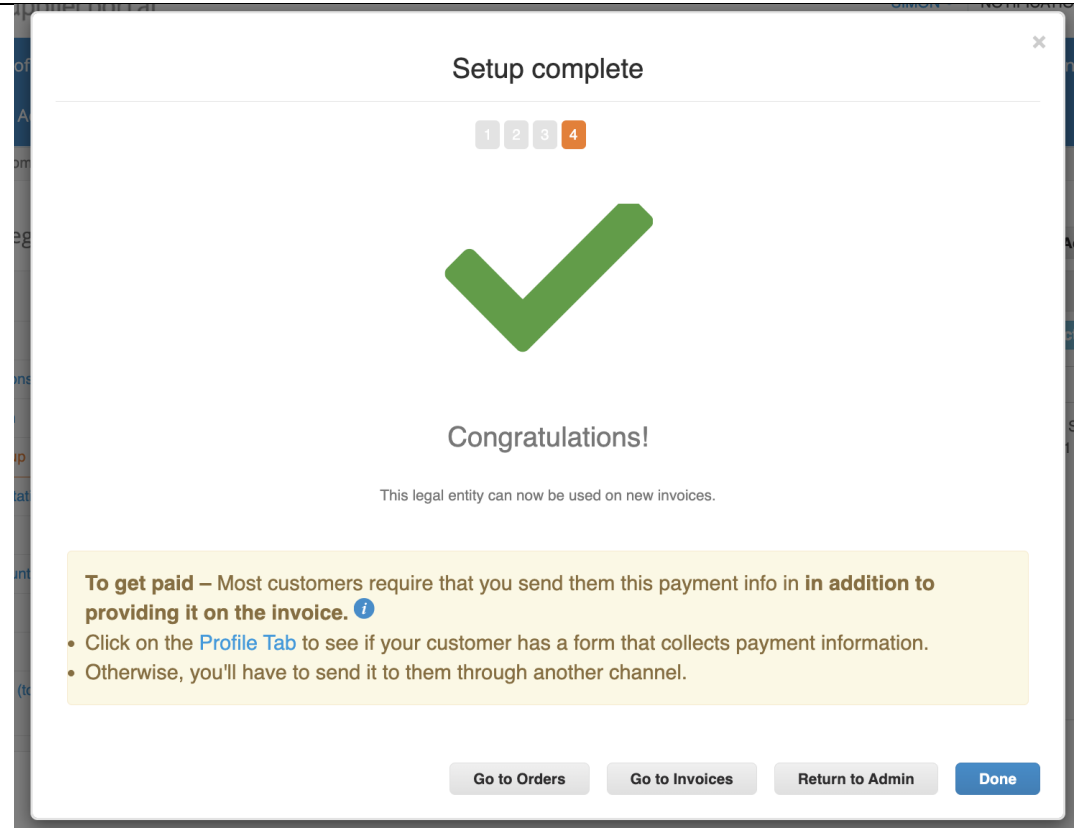


**15.**

'Setup Complete'

Big Green tick

Click 'Done'



You will now see your Legal entity is setup

## Admin Legal Entity Setup

Add Legal Entity

Users

Merge Requests

Merge Suggestions

Requests to Join

Legal Entity Setup

Fiscal Representatives

Remit-To

Early Pay Discounts

sFTP Accounts

cXML Errors

sFTP File Errors (to Customers)

### Legal Entity

Test Supplier SH Actions

| Invoice From                                       | Remit-To Accounts   | Locations  | TAX IDs     | Customers                                |
|--|---|--|-------------|--|
| Test Street<br>London<br>SE1 9SG<br>United Kingdom | <b>Bank Account</b> <span>1 customer</span><br>Bank Name Barclays Bank<br>Beneficiary Test Supplier SH<br>Name<br>Account *****5678<br>Number<br>Transit Code 000000<br>Remit-To Test Street<br>Address London<br>SE1 9SG<br>United Kingdom<br>Active | Test Street<br>London<br>SE1 9SG<br>United Kingdom | GB123456789 | Mitie Group Plc - SRCL<br>LTD_0000601291 |

17.

The primary email on your supplier account will get a conformation of new bank account added to your CSP.

Please note adding or changing your bank or remit to details in your CSP Legal Entity or CSP profile, does not update Mitie's supplier master. If any of your company information has changed, please email [Supplier.Maintenance@mitie.com](mailto:Supplier.Maintenance@mitie.com)

[EXTERNAL] New Bank Account - Barclays Bank: - 5678 in United Kingdom

CS Coupa Supplier Portal <do\_not\_reply@supplier-test.coupa.com>  
To: Simon Hunt

**WARNING: External Email**  
This came from outside Mitie, do not click on links or attachments unless you know the sender  
\*Never Trust, Always Verify\*

**New Bank Account - Barclays Bank: - 5678 in United Kingdom**

Simon Hunt recently added the new Bank Account information below to your Coupa account to be used for payments. If correct, you can ignore this message. If something looks suspicious, please take the appropriate actions immediately.

Bank Name: Barclays Bank  
Account Number: Ending in 5678  
Bank Country: United Kingdom

Login to see more

For all Coupa supplier help and guides [Click here](#) for Mitie Suppliers website.