Setting up Legal Entities

For: GNFR Suppliers to the John Lewis Partnership

Purpose:

This guide explains the process for setting up Legal Entities in Coupa. Please be aware that updating the Legal Entity with new bank details will not update your profile and you will still be paid to the old bank details.

You will need to update the Legal Entity first then submit a GNFR2a form to finalise the change in bank details. You must update both as the GNFR2a form will auto fill a new Remit-To with some details from the legal entity. This will avoid any invoices going on hold or rejected payments.

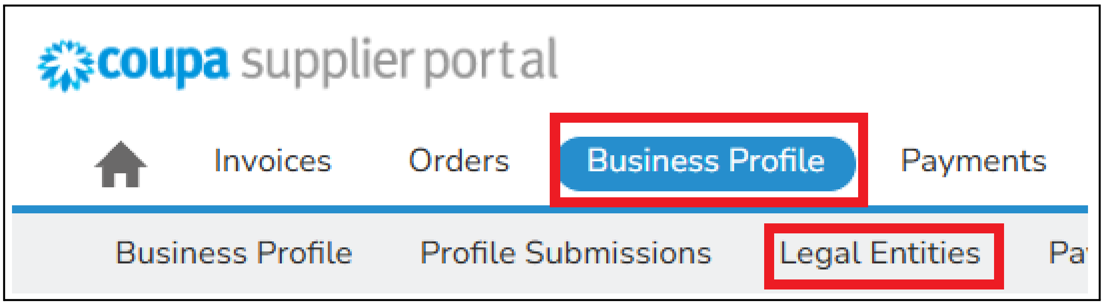
Note: *A guide on Updating Your Details In Coupa (including bank details) can be found by navigating to it in the [Supplier Help Portal](#) or simply typing "updating your details in coupa" into the search bar.*

Frequency:

When you need to inform the John Lewis Partnership of a change to Legal Entity in Coupa.

Actions:

1. To login you will need your email address and password, once logged in you will need to select **Business Profile** then **Legal Entities** from the toolbar across the top



2. You can create, manage, or deactivate legal entities, or manage remit-to accounts. Coupa will only have 1 active Remit -to and therefore only 1 payment method, currency and bank details.

Note: *Coupa may ask for the two factor authentication code when adding legal entities and updating the Remit-To on the GNFR2a form. If you are unable to view this code, please submit a query in the Need More Help section at the bottom of the [home page](#) (shown below).*

Finally, be aware that whilst some of the screenshots in this guide are not an exact match to the Coupa Supplier Portal the functionality is the same. Coupa releases system upgrades three times a year, meaning the look may change. We will update the guide if any functionality is altered.

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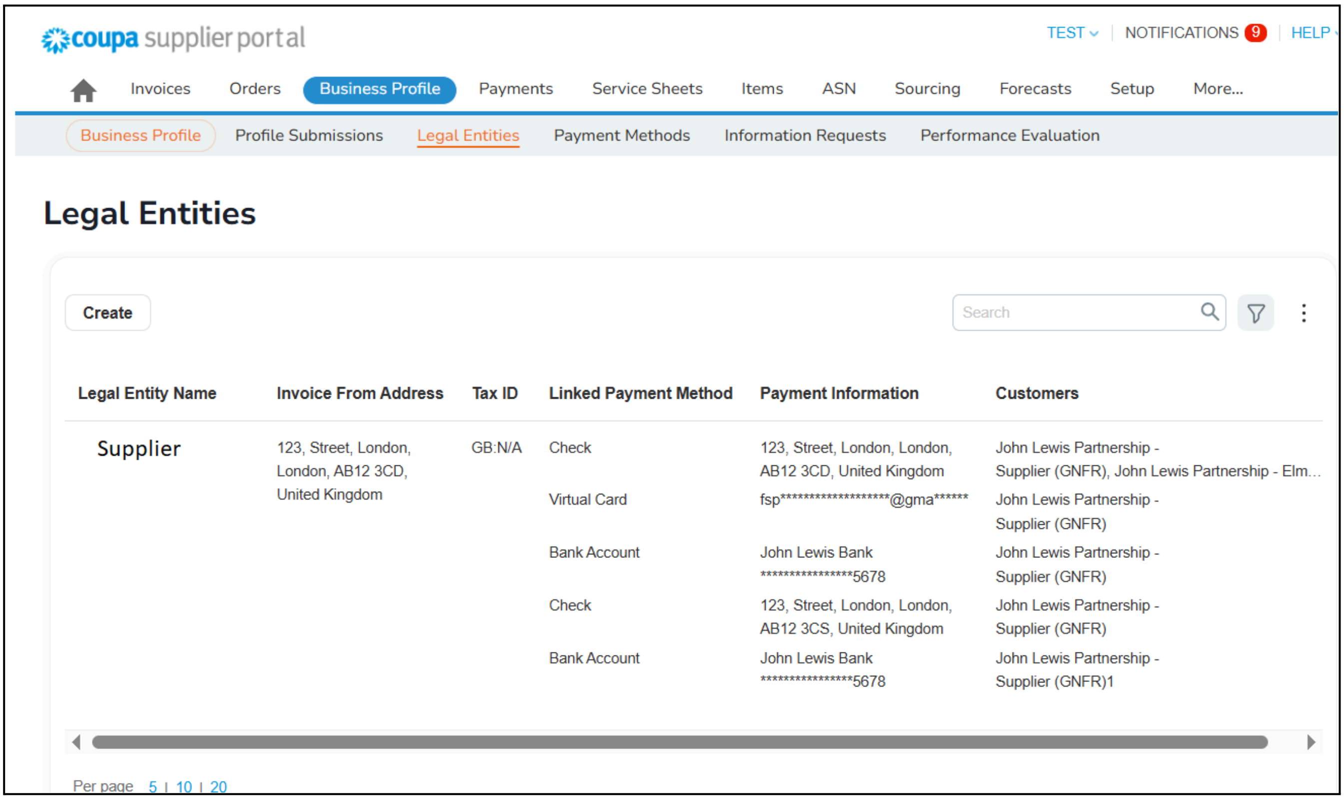
NEED MORE HELP?

Click below for detailed guidance on end-to-end processes, with contact forms when appropriate

Submit A Query

Once you have clicked on the Legal Entities the following will appear



Each legal entity has the following sections:

- **Invoice From**
- **Tax ID**
- **Linked Payment Method**
- **Payment Information**

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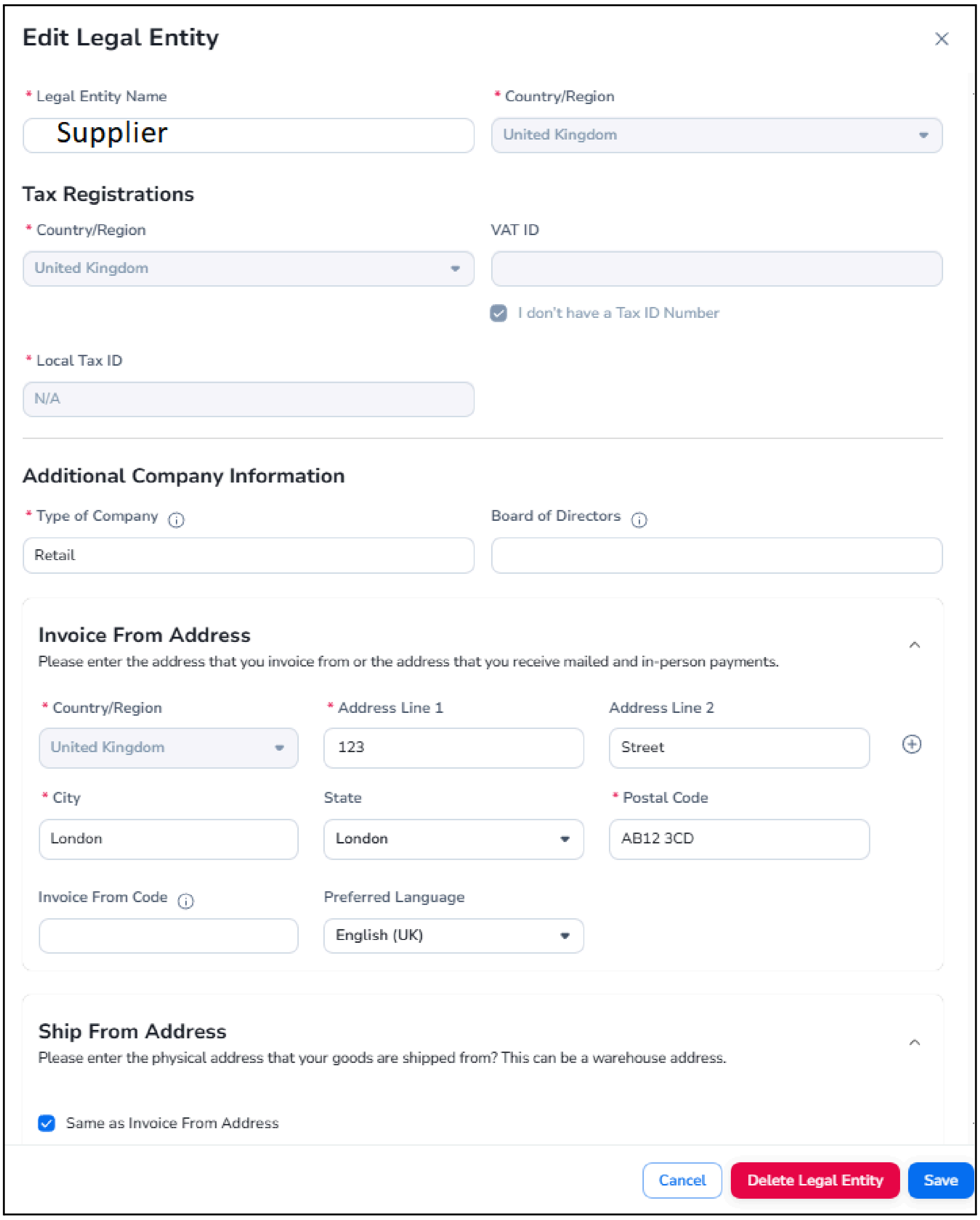
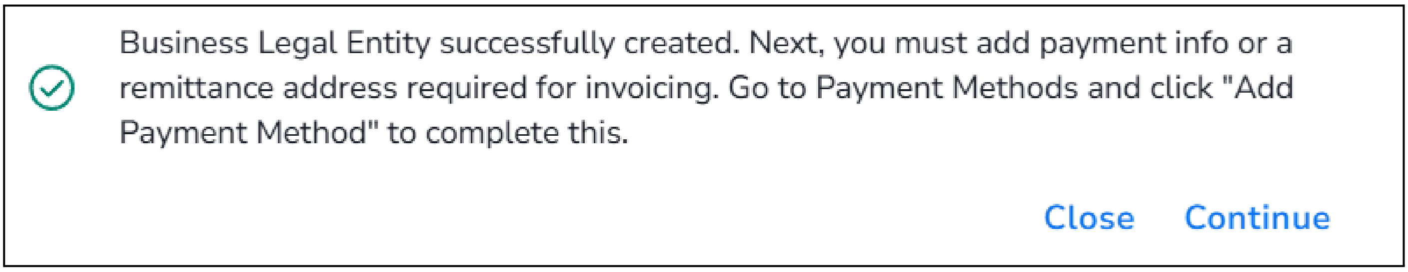
- **Customers** – The name(s) and number of customers that you provided with the specific legal entity are also shown.

If you have more than one legal entity, to view their details, hover over the **Legal Entity Name** and click on the **Pencil** icon and you will see the following:

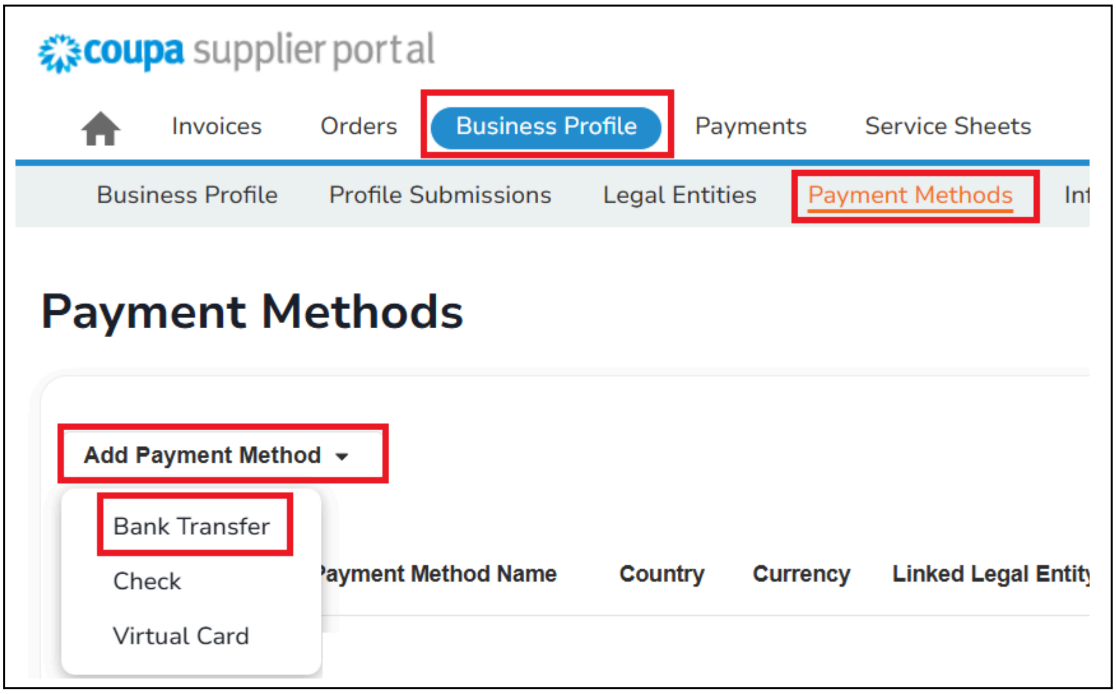


To create a new legal entity, go back to the Legal Entity page and click **Create** in the left hand corner of the screen.

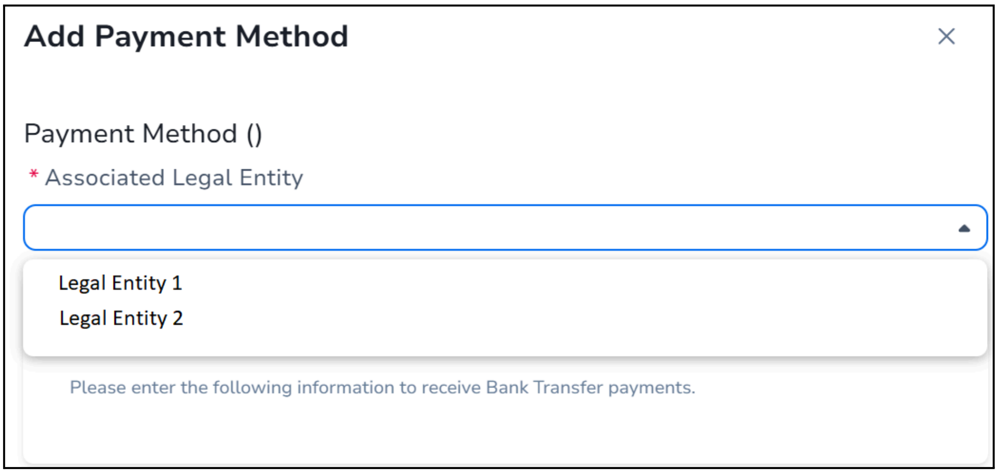
Enter the official name of your business that is registered with the local government (legal entity name) and select the country/region where it is located. Add the **Invoice From Address,** add the **Ship From Address** if different to the Invoice Address. Click **Save**. You will then get a message to go to **Payment Methods** and add a Payment Method, click **Continue.**



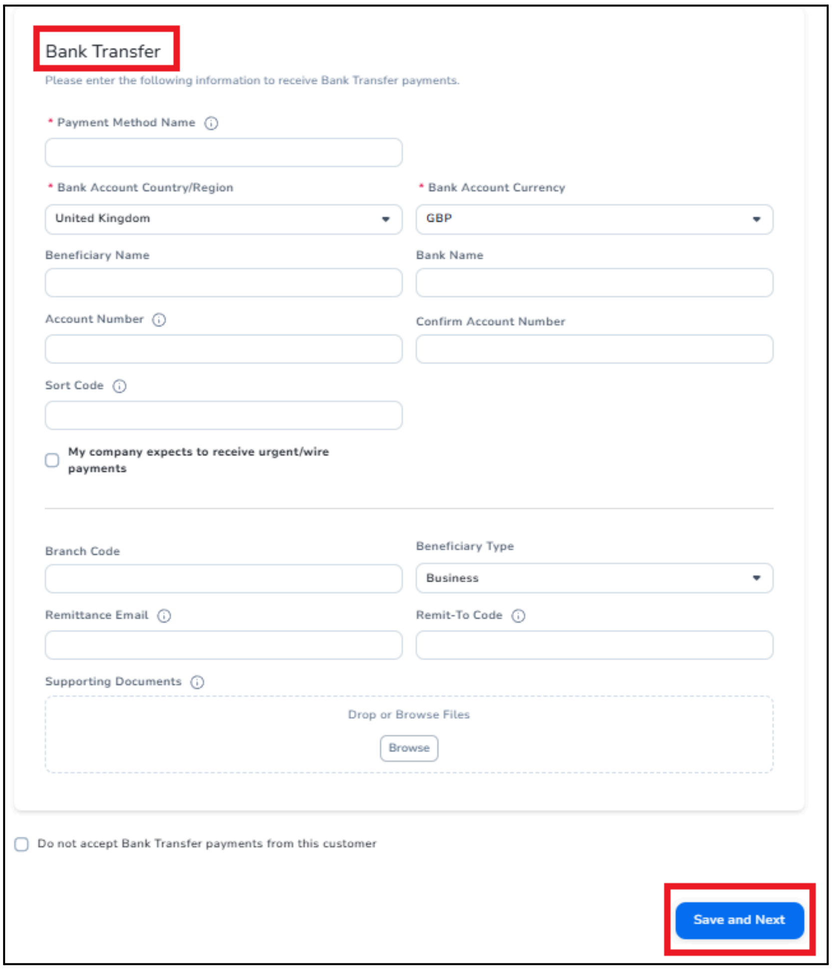
Next, go to **Business Profile** then **Payment Methods,** click **Add Payment Method** and select **Bank Transfer.**



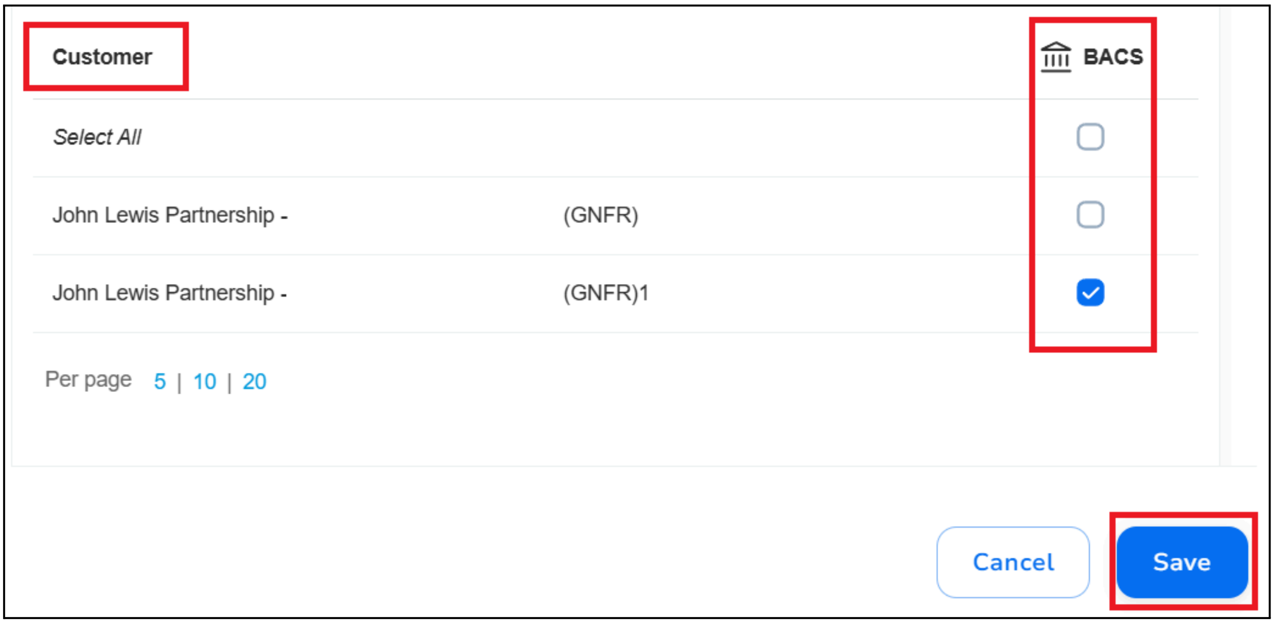
Add the **Payment Method** by selecting your new **Legal Entity.**



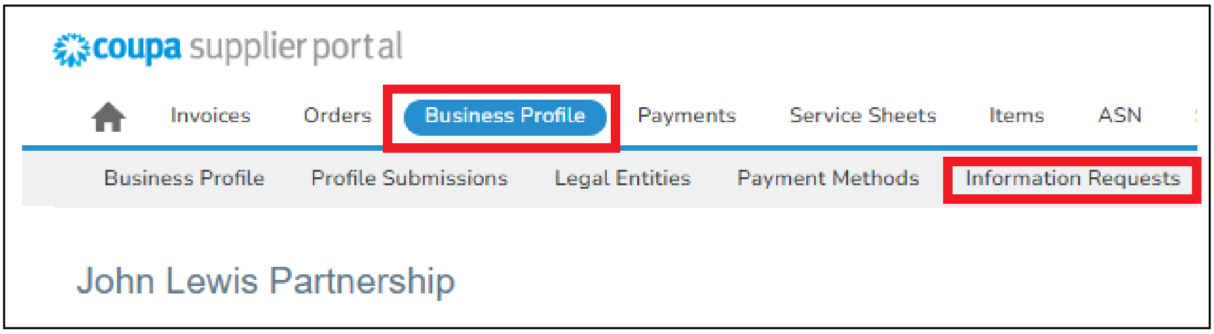
Complete the required fields and click **Save.**



Then select which **Customer(s)** with whom to share your bank details with and click **Save.**



You will then need to update JLP about the changes. To do this, click on **Business Profile** then **Information Requests,** select JLP from the **Select Customer** field and click on John Lewis Partnership and you should see **Form Responses** for JLP.



This will take you to your JLP customer profile. This is where you make amendments to the details that JLP holds for your company (Including bank details).

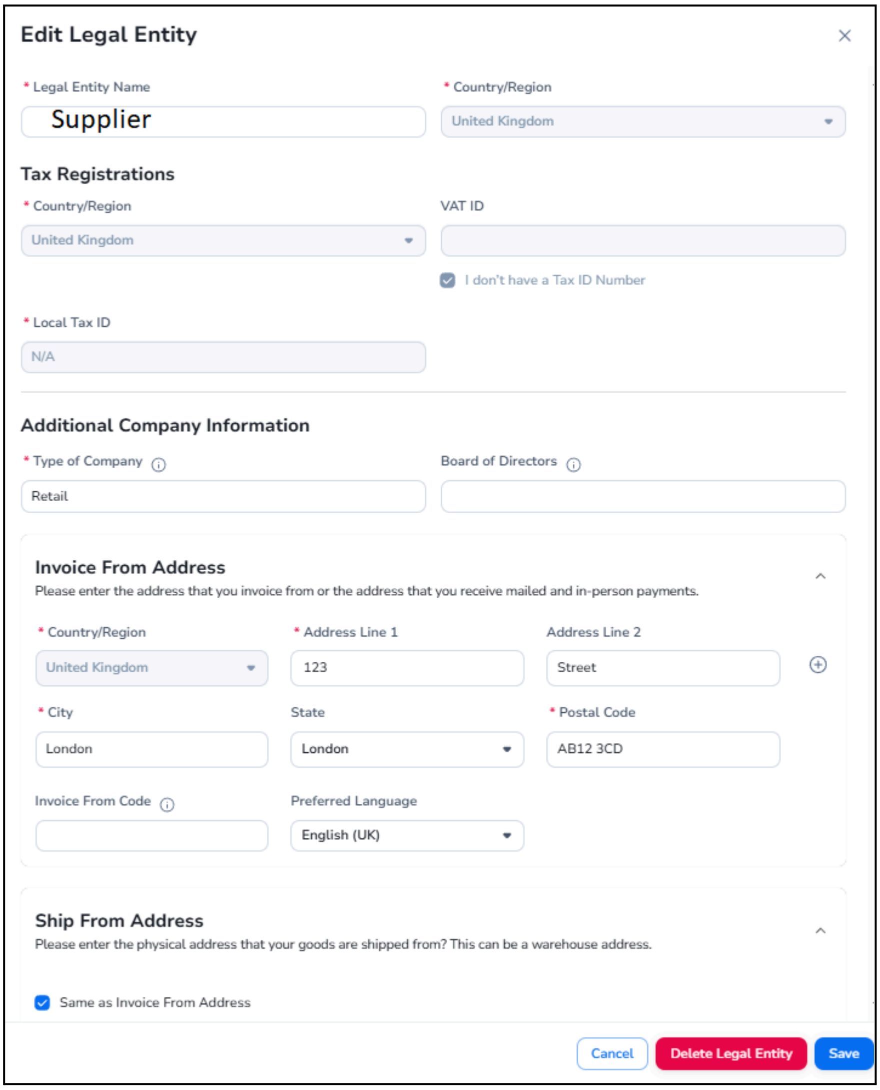
- If the status at the top of the form is **‘Applied’**, this means the details on the form are approved and applied to your account. To make changes scroll to the bottom of the form and press ‘**Update Info**’.
- If the status of the form is ‘**Pending Approval**’, this means the details on the form have been submitted to JLP but have not yet been approved and applied. To make changes scroll to the bottom of the form and press ‘Withdraw’.
- If there is **no** status, this means the form has either never been submitted or it has been rejected by JLP.

To complete the update with JLP, please refer to the Updating You Details in Coupa guide.

Managing Legal Entities

To manage your legal entities, click on **Business Profile** then **Legal Entities,** select the Legal Entity you wish to manage.

If you wish to deactivate a legal entity, you can do so by hovering over the **Legal Entity Name** and clicking on the **Pencil** icon and you will see the following where you can click **Delete Legal Entity** in the bottom right corner:



If you have added a Legal Entity and clicked **Save**, you can use it on new invoices. From the Home page you can choose to **Go to Orders** then **Orders** again.

Useful Links:

Link to: [Coupa Compass guide to Legal Entities]

Link to: [Coupa Supplier Portal]

Link to: [Technical Help Using Coupa]