

Supplier User Guide



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1. Introduction

Welcome to Grupo Planeta's supplier registration process!

This document is prepared to help you in the registration process in the **purchasing and supplier management portal of Grupo Planeta, COUPA** (hereinafter CSP) as well as to guide you in all its functional operations that will allow you to check the status of your orders in real time, create and manage invoices, and see the situation of collections among many other functionalities.

At Grupo Planeta we are aware that this new platform is a change in the way we have interacted so far with suppliers, but we know that it will result in a benefit for all parties. We are here to support you throughout the transition process and appreciate your willingness and collaboration in adopting these new processes.

If you have any additional questions or doubts about the content of this guide, you can contact us at: suppliers@planeta.es

2. Introduction to CSP

This section details the instructions for the correct registration in the COUPA Supplier Portal (CSP).

2.1 Registration in COUPA Supplier Portal (CSP)

The previous step is to receive an invitation from Grupo Planeta by email like the one shown in the example below, with sender:

Coupa Supplier Portal < **do_not_reply@supplier.coupa.com** >

Grupo Planeta Profile-Information Request - Action Required Recibidos x

 **Coupa Supplier Portal** <do_not_reply@supplier-test.coupahost.com>
para pruebasourc+5555555555 ▾

🌐 inglés ▾ > español ▾ [Traducir mensaje](#)

 Grupo Planeta Profile Information Request - Action Required

Powered by 

Estimado Proveedor:
Para continuar con la solicitud de Alta de Proveedor de Grupo Planeta que está siendo gestionada a través de la plataforma Coupa, pulse en el enlace siguiente para introducir sus datos de contacto y aportar la documentación solicitada.
En caso de no funcionar el enlace adjunto, rogamos se ponga en contacto en el siguiente mail compras@planeta.es
Cordialmente,

Grupo Planeta

Dear Supplier:
To continue with the Grupo Planeta membership registration request that is being managed via Coupa platform, click on the link below to enter your contact and provide the requested documentation.
Failure to run the attached link, please notify to the mail compras@planeta.es
Yours sincerely,

Grupo Planeta

Cher fournisseur:
Pour poursuivre la demande d'enregistrement de fournisseur Grupo Planeta qui est gérée via Coupa Plate-forme, cliquez sur le lien suivant pour informer vos coordonnées et fournir la documentation demandée.
Si le lien ci-joint ne fonctionne pas, notifiez-le à l'adresse mail compras@planeta.es.
Cordialement,

Grupo Planeta

[Join and Respond](#)

The **first step** will confirm that the email address where you receive the invitation is the one you will use to register and operate in the CSP.

The **second step** will be to click on the "Join and Respond" button that appears below the signature of Grupo Planeta that will redirect you to the CSP registration page.

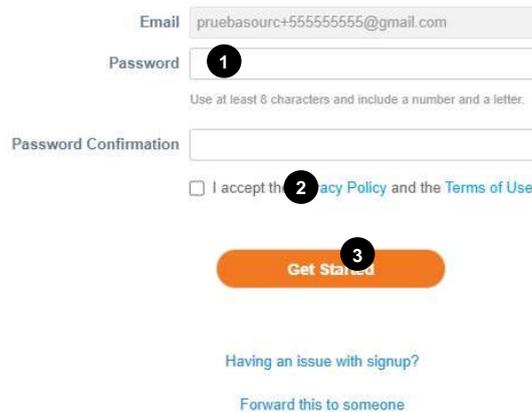
The Portal can be accessed at any time from any Internet browser (Internet Explorer, Chrome, Safari, etc.).

We recommend saving the link (<https://supplier.coupahost.com/sessions/new>) in your bookmarks bar to save you time on future accesses. Once on the CSP homepage, follow the steps below to create your account and password.



Create your business account

Grupo Planeta is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Grupo Planeta so you're ready to do business together.



Email

Password
Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

[Having an issue with signup?](#)

[Forward this to someone](#)

1. Enter and confirm your password (minimum 8 characters including letters and numbers)
2. Please read carefully and accept the Privacy Policies and Terms of Use.
3. Press the "Get Started" button

You can always change the **language** by clicking on the active language that appears at the bottom of the page to select the preferred language.



1. Slide the cursor to the bottom of the screen and click on the English link.
2. Select your language from the list that is displayed.

Once logged into the COUPA Supplier Portal, follow the steps below to complete your profile as a supplier of Grupo Planeta by adding basic information about your company, data such as the billing and shipping address, banking information, etc. Fields marked with a red

asterisk (*) are mandatory.

Supplier profile form titled "Tell us about your business". The progress bar shows "Basics" as the active step, with "Payment" and "Profile" as subsequent steps. The form includes the following fields:

- * Company Name: TEST PANTALLAS (with subtext "Your official registered company name")
- Website
- * Country/Region (dropdown menu)
- * Address Line 1
- Address Line 2
- * City
- State
- * Postal Code

Supplier profile form titled "Would you like to offer discounts to get paid faster?". The progress bar shows "Basics" as the active step, with "Payment" and "Profile" as subsequent steps. The form includes the following sections:

- Payment Discount Preferences** (with a building icon)
- Your default payment term**: A list of terms (Net 30, Net 45, Net 60, Net 75, Net 90, Net 120) with right-pointing arrows.
- Automatically replace with this discount** (with subtext "you can change this later"): A list of dropdown menus, each currently set to "None".
- Use these preferences for all your customers



Powered By 



You are one step away from doing business with Grupo Planeta !



Grupo Planeta requires some additional information

Finally, you will have to complete a form defined by Grupo Planeta with basic information about your company.

 supplier portal JUAN | NOTIFICACIONES 1 | AYUDA

Inicio Perfil Órdenes Hojas de servicio/horas ASN Facturas Catálogos Rendimiento empresarial Abastecimiento

Complementos Configuración

Your Profile Information Requests

Grupo Planeta Perfil Grupo Planeta

✓ Hemos rellenado automáticamente cierta información de su perfil público.

Información Del Proveedor TEST PANTALLAS

Información del Proveedor / Supplier information / Informations sur le prestataire

* Nombre: TEST PANTALLAS

Nombre para mostrar: TEST PANTALLAS

* Id. de impuestos internacional: 48596523K

* Tipo de organización: [Dropdown]

Dirección principal / Primary Address / Adresse principale

El campo Código Postal es obligatorio para los proveedores de España.

* Dirección principal / Primary Address / Adresse principale

Pais/Región: Estados Unidos

Nombre de dirección: [Input]

Domicilio: dddd

Domicilio 2: [Input]

Ciudad: aaaa

Estado o región: Select an Option

In the field "Id. De impuestos internacional " you must indicate the VAT ID of your company

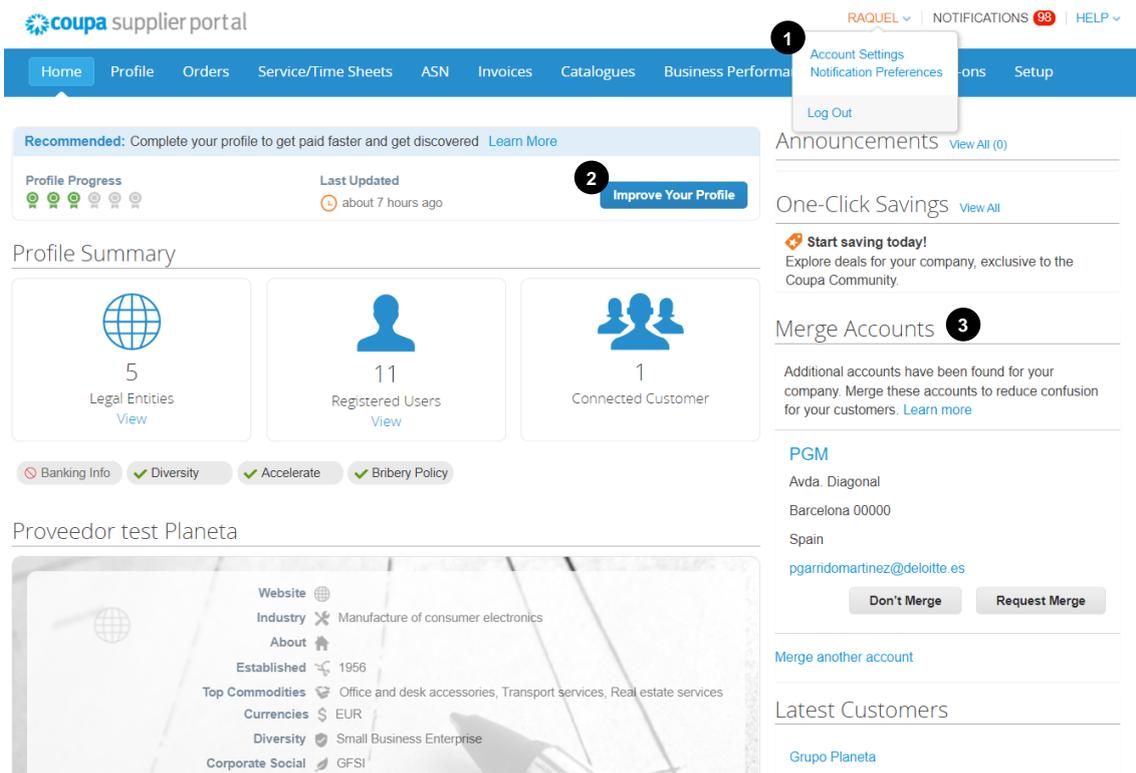
2.2 Navigation in COUPA. Profile settings.

On the homepage, you will have access to all the information through different tabs, the main ones are: Profile, Orders, Invoices and Settings.



- | | | | |
|--|---|---|---|
| 1. Home: Access to the homepage. | 5. ASN: Access to Advanced Shipping Notifications (sending notifications when items and services | are sent to Grupo Planeta) | Customer Sourcing Events at COUPA |
| 2. Profile: Access to profile settings. | 6. Invoices: All invoices created and sent. | 6. Invoices: All invoices created and sent. | 10. Add-ons: Advantages offered by COUPA (COUPA Advantage, discounts...) |
| 3. Orders: Display of all orders received. | 7. Catalogues: Section for the management of customer catalogs. | 7. Catalogues: Section for the management of customer catalogs. | 11. Setup: Management for Administrator settings. Additional features include Account Settings, Notifications, Invite Users, and Merge Accounts |
| 4. Service/Time Sheets: display of all time control tabs created (<i>not enabled for Grupo Planeta</i>). | 8. Business Performance: Summary of orders and invoices that may need attention, as well as orders to date, invoices, and delivery time trends. | 8. Business Performance: Summary of orders and invoices that may need attention, as well as orders to date, invoices, and delivery time trends. | |
| | 9. Sourcing: | 9. Sourcing: | |

This first page will show the general information of your company:



1. Accessing the account settings, which are located in the top right corner, is done by hovering over the user name and clicking on Account Settings.

2. Improve your profile:

complete here the data of the company and that will appear in the directory of COUPA. Your company's general information is visible to all customers who are COUPA users

3. On the right side is the option to merge COUPA accounts in a single session if your company has more than one COUPA account

The Public Profile is what Coupa's other customers, in addition to Grupo Planeta, can see about your company in the CSP.

In My Account Settings, you can change your first and last name, department, role, and password.

coupa supplier portal RAQUEL | NOTIFICATIONS 98 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

My Account Settings

Settings

Notification Preferences

Security & Two-Factor Authentication

User Details

* First Name

* Last Name

* Email

Department

Role

[Save](#)

Change Password

* Current Password

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

[Save](#)

In "Security and two-factor authentication" of the My Account Settings menu you can **enable or disable two-way authentication Factors** (*Prevent unauthorized users from accessing the account Setting up two-factor authentication codes is done in three easy steps. Validation codes will be prompted to enter only once every 30 days, or when attempting to log on to another computer*).

To do this, click Enable SMS or the Two-Factor Authentication App, depending on your preferred method of receiving the verification codes.

- If you choose SMS, type the verification code in the pop-up window.

Enter the code that you received by SMS ✕

Your verification code has been sent to: +1 201-555-5555

* Code

[Cancel](#)
[Resend Code](#)
[OK](#)

When the validation completes successfully, you will receive the verification codes in text messages.

- Follow the on-screen instructions to install and use Google Authenticator.

Two-Factor Authentication ✕

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.



1. Download Google Authenticator mobile app






2. Scan this QA code using Google Authenticator app





3. Enter the 6-digit validation code - open your mobile device's 'Google Authenticator' app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code

Remember this computer for 30 days

No Thanks. Continue without additional security
Enable

If you are not using a shared computer, select "Remember this computer for 30 days" and click Enable.

Before you click OK, print the backup codes or send them to your email. If you lose your device, you will need them to obtain access to your CSP account.

My Account Security & Two-Factor Authentication

- Settings
- Notification Preferences
- Security & Two-Factor Authentication

Mobile Phone Verification

Mobile Phone : Not verified

+1 201-555-5555

This phone will receive SMS Notifications

[Validate](#)

Two-Factor Authentication

SMS : Disabled

Verify your mobile phone to receive verification codes by text message

[Enable](#)

Two-Factor Authenticator App : Disabled

[Enable](#)

!! Important!

Recovery codes can be used only once. Update the list if you have to use one.

For a new list of codes, go to Account Settings > Security and Two-Factor Authentication and click Regenerate Recovery Codes.

Disable two-factor authentication

Under Two-factor authentication, click Disable SMS or the Two-Factor Authentication App. In the new window, enter your CSP password and click Disable two-factor authentication.

When you enable or disable two-factor authentication, you will receive an email notification confirming the change.

In "Notifications", you will see all the notifications that need to be reviewed such as generation of new orders, status changes in your invoices, messages, etc. Notifications are similar to an email inbox.

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress Last Updated

about 7 hours ago

[Improve Your Profile](#)

Profile Summary

RAQUEL | NOTIFICATIONS 98 | HELP

[Update Profile](#)

Update your profile for Grupo Planeta

[Update information requests](#)

You have existing information requests that have not been updated with your current profile information. You

[Payment Role Given to User](#)

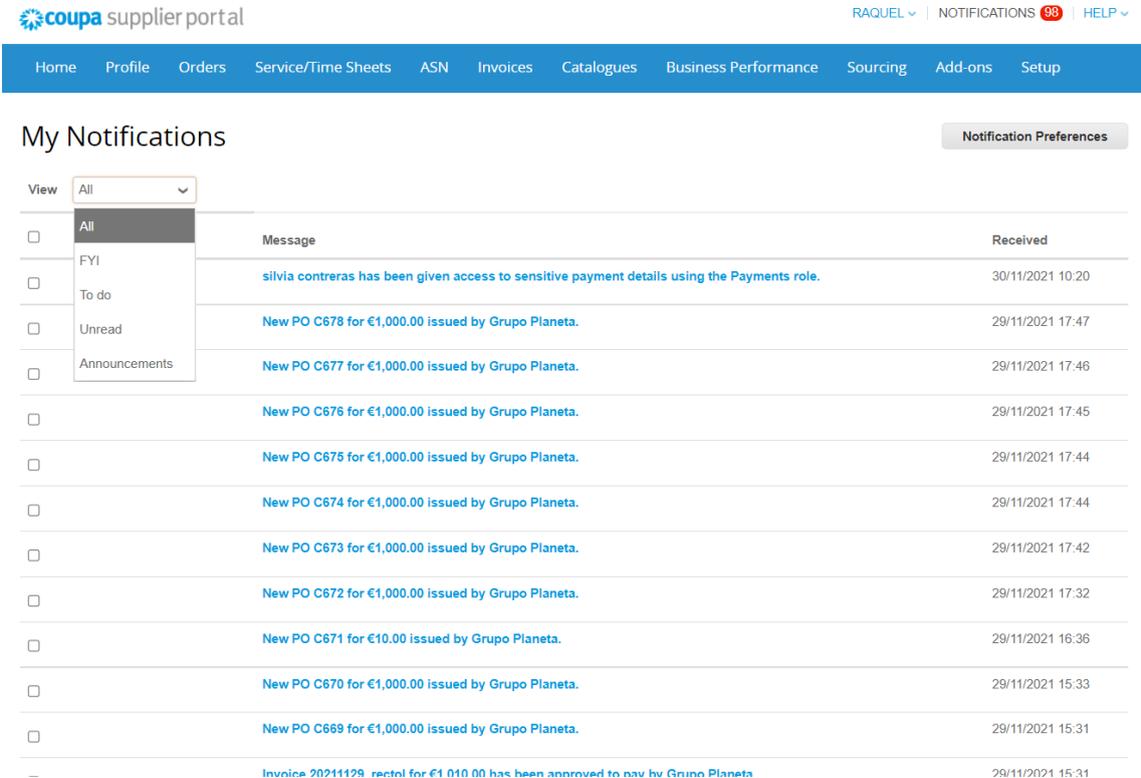
silvia contreras has been given access to sensitive payment details using the Payments role.

[See all Notifications](#)

Note: By default, only previews of the last 3 notifications are shown. To see all the text of a notification, select it and a pop-up window will open.

To view all full notifications, click the "View all notifications" link. You'll be added to the My Notifications page.

On the My Notifications page, you can see all your notifications (read and unread) or you can filter by category (All, Sure, Tasks, Unread, or Ads). You can select and delete them all or one by one.



coupa supplier portal RAQUEL | NOTIFICATIONS 98 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

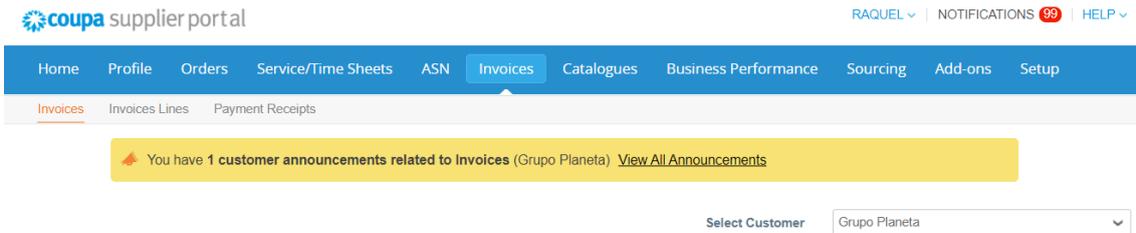
My Notifications Notification Preferences

View: All

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	silvia contreras has been given access to sensitive payment details using the Payments role.	30/11/2021 10:20
<input type="checkbox"/>	New PO C678 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:47
<input type="checkbox"/>	New PO C677 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:46
<input type="checkbox"/>	New PO C676 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:45
<input type="checkbox"/>	New PO C675 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:44
<input type="checkbox"/>	New PO C674 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:44
<input type="checkbox"/>	New PO C673 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:42
<input type="checkbox"/>	New PO C672 for €1,000.00 issued by Grupo Planeta.	29/11/2021 17:32
<input type="checkbox"/>	New PO C671 for €10.00 issued by Grupo Planeta.	29/11/2021 16:36
<input type="checkbox"/>	New PO C670 for €1,000.00 issued by Grupo Planeta.	29/11/2021 15:33
<input type="checkbox"/>	New PO C669 for €1,000.00 issued by Grupo Planeta.	29/11/2021 15:31
<input type="checkbox"/>	Invoice 20211129 rectal for €1 010.00 has been approved to pay by Grupo Planeta	29/11/2021 15:31

As a supplier, you can see Grupo Planeta ads at the top of the right section of the CSP homepage. The ads are configurable by Grupo Planeta to be able to communicate with you, for example, about how to join or what to do after joining the CSP, thus improving the experience of onboarding, training and exchange of information for your transactions, communicate holiday periods, among others.

Grupo Planeta can select other pages to inform you of their ads, you can see a yellow banner at the top of those pages notifying you of the number of ads for those specific areas of the selected customers and the link from which to access those ads.



coupa supplier portal

RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

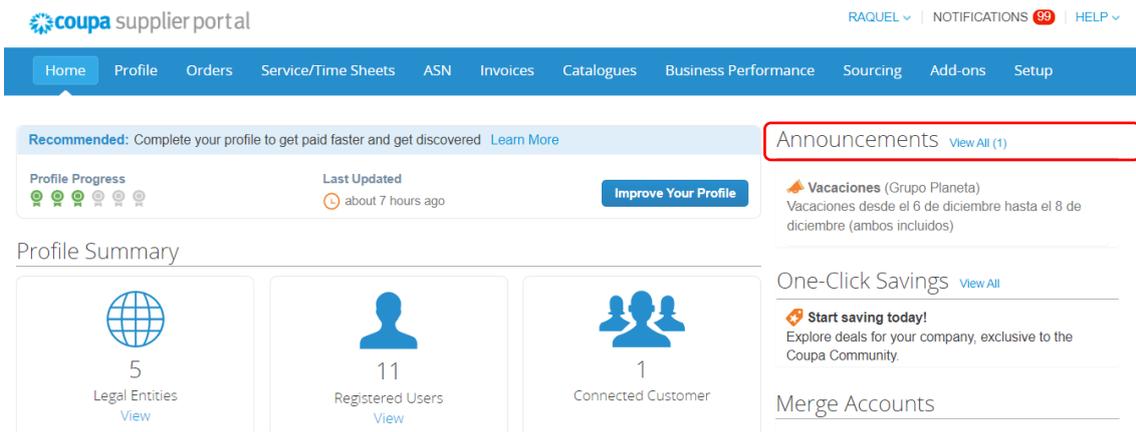
You have 1 customer announcements related to Invoices (Grupo Planeta) [View All Announcements](#)

Select Customer Grupo Planeta

Note: The banner is not visible on the **Homepage**, in the **Profile** customer-specific, on the **Configuration** and on the **Public profile** accessed from the link in the public profile section of the Home page.

By default, only the two most recent ads are shown previews. You can see the full text of an ad in a pop-up window after clicking on it.

To see all your ads with their full message, click the View All link that takes you to the My Notifications page filtered by Ads.



coupa supplier portal

RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress 5/5 Last Updated about 7 hours ago [Improve Your Profile](#)

Profile Summary

5 Legal Entities [View](#)

11 Registered Users [View](#)

1 Connected Customer

Announcements [View All \(1\)](#)

Vacaciones (Grupo Planeta)
Vacaciones desde el 6 de diciembre hasta el 8 de diciembre (ambos incluidos)

One-Click Savings [View All](#)

Start saving today!
Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

Managing notification preferences

You can also parameterize communication preferences as soon as there are notifications of status updates. To configure the notification settings you can access through these two alternatives:

1. "Notifications" and clicking on "Notification Preferences"

My Notifications

1 Notification Preferences

View All

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	Vacaciones (Grupo Planeta) Vacaciones desde el 6 de diciembre hasta el 8 de diciembre (ambos incluidos)	30/11/2021 17:36

- Place the cursor in the user's name, select "account settings" and click on "Notification preferences" (1)

My Account Notification Preferences

- Settings
- 2** Notification Preferences
- Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--	--------------------------------	------------------------------

Business Performance

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
-----------------------------------	--	--------------------------------	------------------------------

Catalogues

Catalogue about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Catalogue approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
New comment received	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Coupa Accelerate

New Early Pay Customer	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Coupa Pay

Select the option buttons for the items you want to receive any or all types of notification from: Online (task list), email, or SMS (short message service).

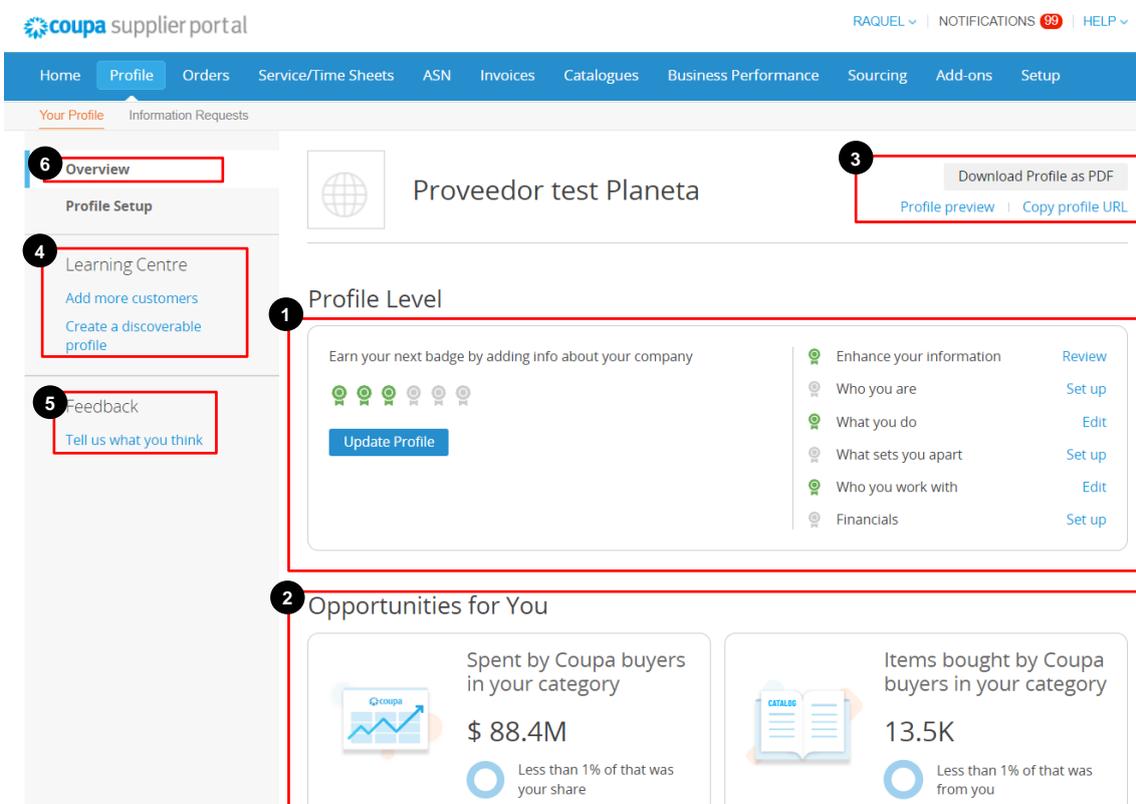
NOTE: For the latter case (SMS) it will only be possible if you have an SMS compatible device and if you validate your phone number: on the My Account page, click on Security and on the Two-Factor Authentication link) to validate the mobile phone on which you want to receive the notification.

Once adjusted to your preferences, head to the bottom right and click the Save button.

Service/Time Sheets

A Service/Time Sheet is rejected	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A Service/Time Sheet is approved	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

To update your company information for Grupo Planeta, it is necessary that you contact the purchasing representative of Grupo Planeta to request the necessary modifications.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The user is logged in as RAQUEL with 99 notifications and a help menu.

The main content area is titled "Proveedor test Planeta" and includes a "Download Profile as PDF" button and links for "Profile preview" and "Copy profile URL".

The "Profile Level" section shows a progress indicator with 5 green badges and an "Update Profile" button. It lists several profile sections with their completion status and actions:

Section	Status	Action
Enhance your information	Completed (Green badge)	Review
Who you are	Not completed (Grey badge)	Set up
What you do	Completed (Green badge)	Edit
What sets you apart	Not completed (Grey badge)	Set up
Who you work with	Completed (Green badge)	Edit
Financials	Not completed (Grey badge)	Set up

The "Opportunities for You" section displays two key metrics:

- Spent by Coupa buyers in your category:** \$ 88.4M. A progress indicator shows "Less than 1% of that was your share".
- Items bought by Coupa buyers in your category:** 13.5K. A progress indicator shows "Less than 1% of that was from you".

The sidebar on the left contains the following sections:

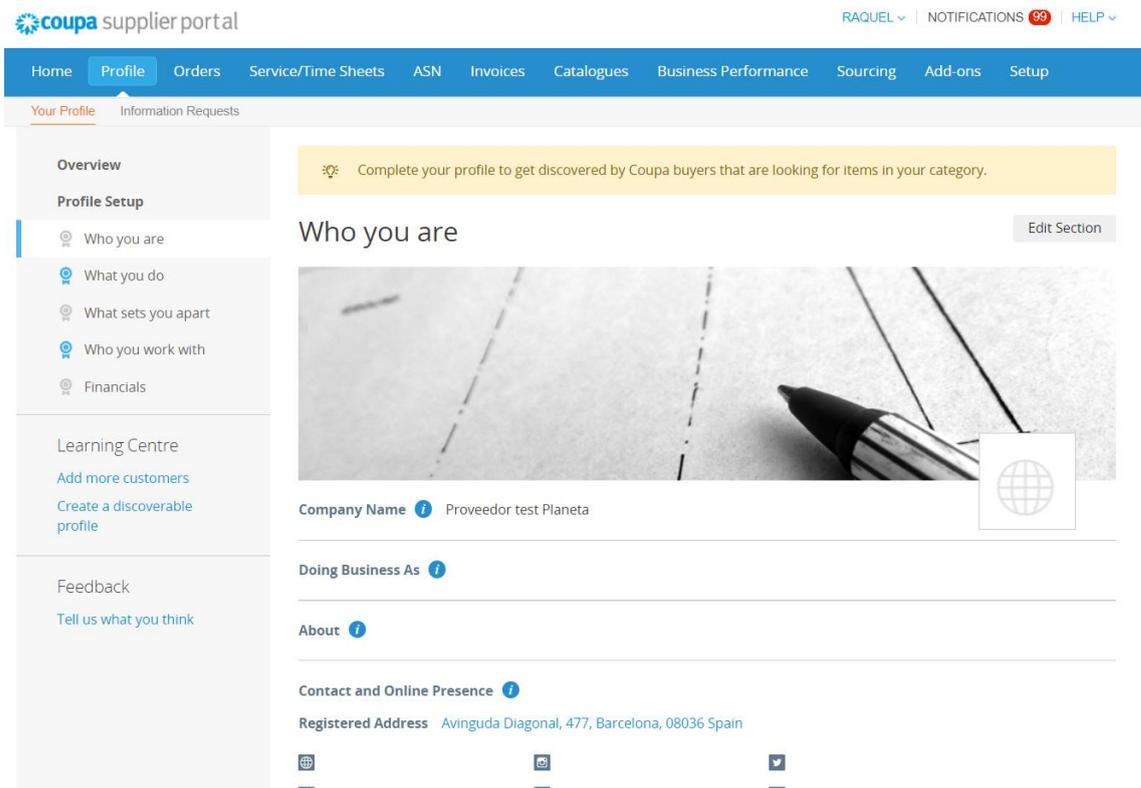
- 6 Overview** (highlighted)
- Profile Setup**
- 4 Learning Centre** (highlighted) with links: "Add more customers", "Create a discoverable profile".
- 5 Feedback** (highlighted) with link: "Tell us what you think".

On the Profile tab, the general information section displays a number of indicators such as profile completion status, business opportunities you could take advantage of, and a preview of how your profile looks to others.

You can also see the Profile Settings sections in the side menu that divide your profile information into sections that show your business:

1. The "Profile Level" section shows how many sections of your profile you have completed, indicated by a green badge. Clicking the Update Profile button opens the selected profile section.

2. This section suggests opportunities to improve your business, based on the products and services you have selected in the Product and Service Categories field in the "What you do" section of your profile. The CSP examines the cumulative amount of buyers' expenses and the number of items purchased in the relevant expense categories and shows the percentage of those expenses that your business represents.
3. Here you can see how your profile looks for buyers from the Supplier Portal Directory in Coupa. You can also click "Copy Profile URL" to give it to current and potential customers. If you want to use your CSP profile as a marketing tool, you can download your profile in PDF format.
4. Links that provide more information about the profile.
5. You can click on "Tell us what you think" to send feedback to Coupa about your CSP experience.
6. If your customers use requests for information, this section shows the forms they've sent to your business requesting information. To start filling in your profile information, select the "Update Profile" or "Profile Settings" button from the menu on the left.



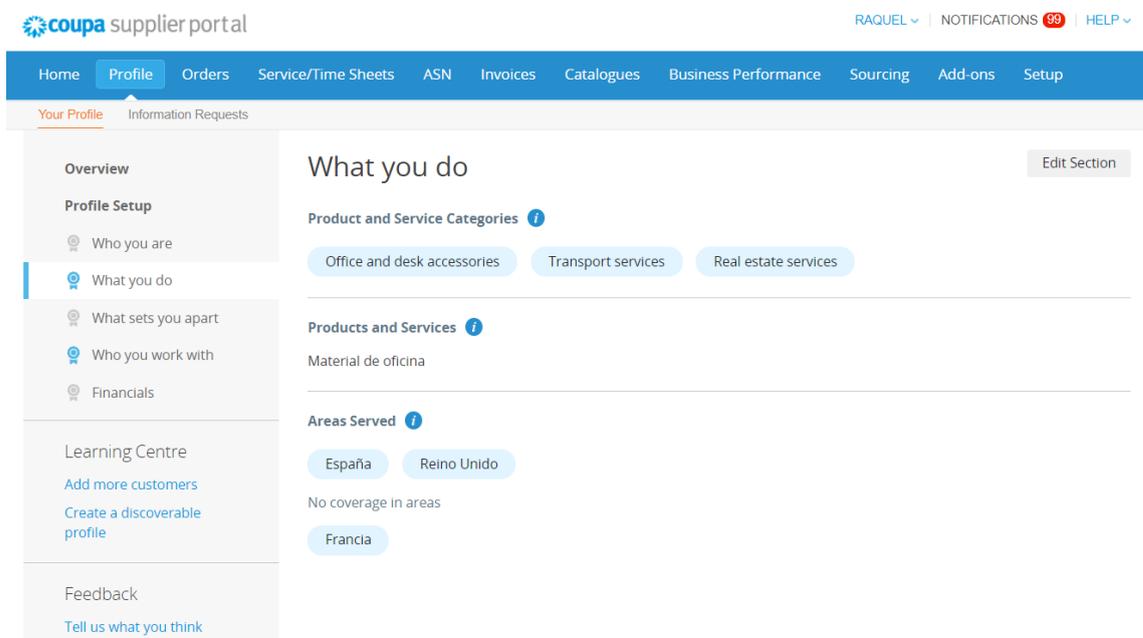
The "Who you are" section gives customers more detailed information about your business, such as what you do, how customers can contact your business, and how they can interact with it on social media.

To receive your badge for completing this section, you must complete the following fields:

- Name of the company. The legal name of your company.
- About. Description of your company and what makes it unique (maximum 3,000 characters).
- Size of the company. Select a range from the drop-down list to show the size of your business.
- Primary contact. Information about who your customers should contact: name of your company's contact person; role of the main contact in your company; email address that customers can use to find out about your company; mobile phone number that customers can use to find out about your business; work phone number that customers can use to find out about your company. The contact's profile picture that appears on your profile.

NOTE: The CSP fills in the information you provided when you signed up for the CSP.

- Registered address. You can add your business address
- Tax identification number. The tax identification number of your company that your customers need to be able to make purchases.
- Year of creation. Year of creation of your company



The screenshot shows the 'coupa supplier portal' interface. The user is logged in as 'RAQUEL' with '99' notifications and a 'HELP' dropdown. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Profile' section is active, showing 'Your Profile' and 'Information Requests' tabs. The left sidebar contains 'Overview', 'Profile Setup' (with sub-items: 'Who you are', 'What you do', 'What sets you apart', 'Who you work with', 'Financials'), 'Learning Centre' (with sub-items: 'Add more customers', 'Create a discoverable profile'), and 'Feedback' (with sub-item: 'Tell us what you think'). The main content area is titled 'What you do' and includes an 'Edit Section' button. It displays three sections: 'Product and Service Categories' with tags for 'Office and desk accessories', 'Transport services', and 'Real estate services'; 'Products and Services' with the text 'Material de oficina'; and 'Areas Served' with tags for 'España', 'Reino Unido', and 'Francia', plus a note 'No coverage in areas'.

The "What you do" section provides your customers with detailed information about the products and services your company offers and the countries and regions in which you

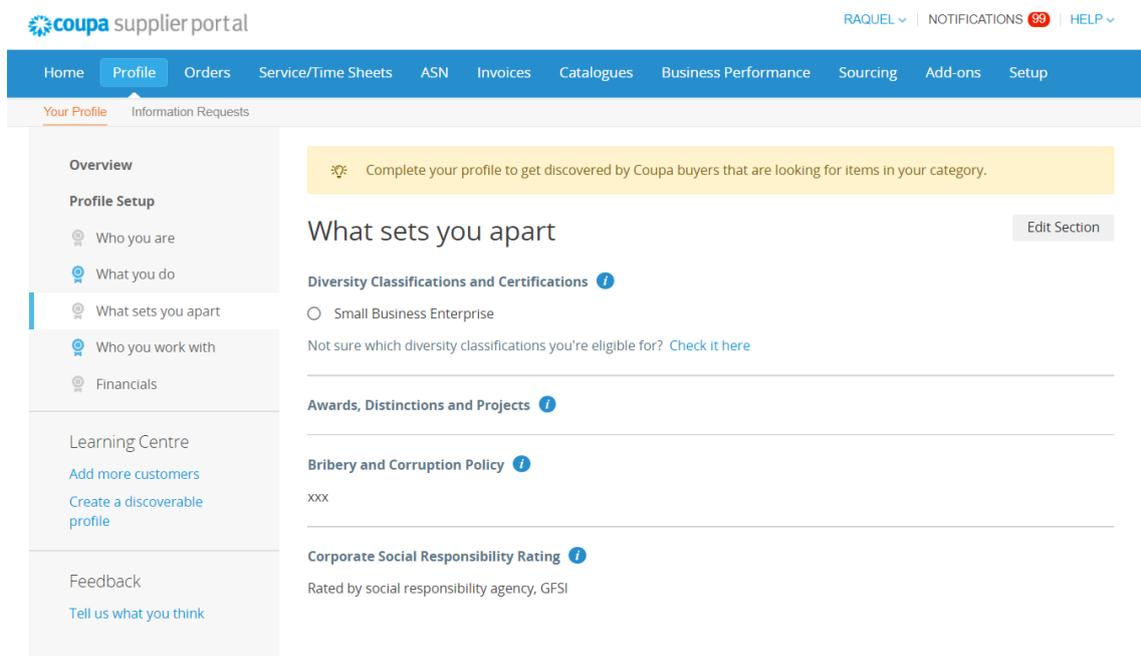
operate. To receive your badge for completing this section, you must complete all the fields:

- Categories of products and services. Add product and service categories to show the types of products and services your business offers.

NOTE: If you don't add a category, the Opportunities section on the overview page doesn't show data.

- Products and services. You can enter free text descriptions of your products and services.
- **Areas in which you serve**. Select the areas and regions in which you do business, as well as the areas in which you do not do business in the "No coverage in areas" section.

NOTE: If you select Regional, enter the regions you serve in the box that appears.



The "What sets you apart" section gives information to your customers about your company's diversity, the awards and honors that set it apart from others, and the policies and ratings that influence how customers evaluate whether they want to do business with you.

To receive your badge for completing this section, you must complete the following fields:

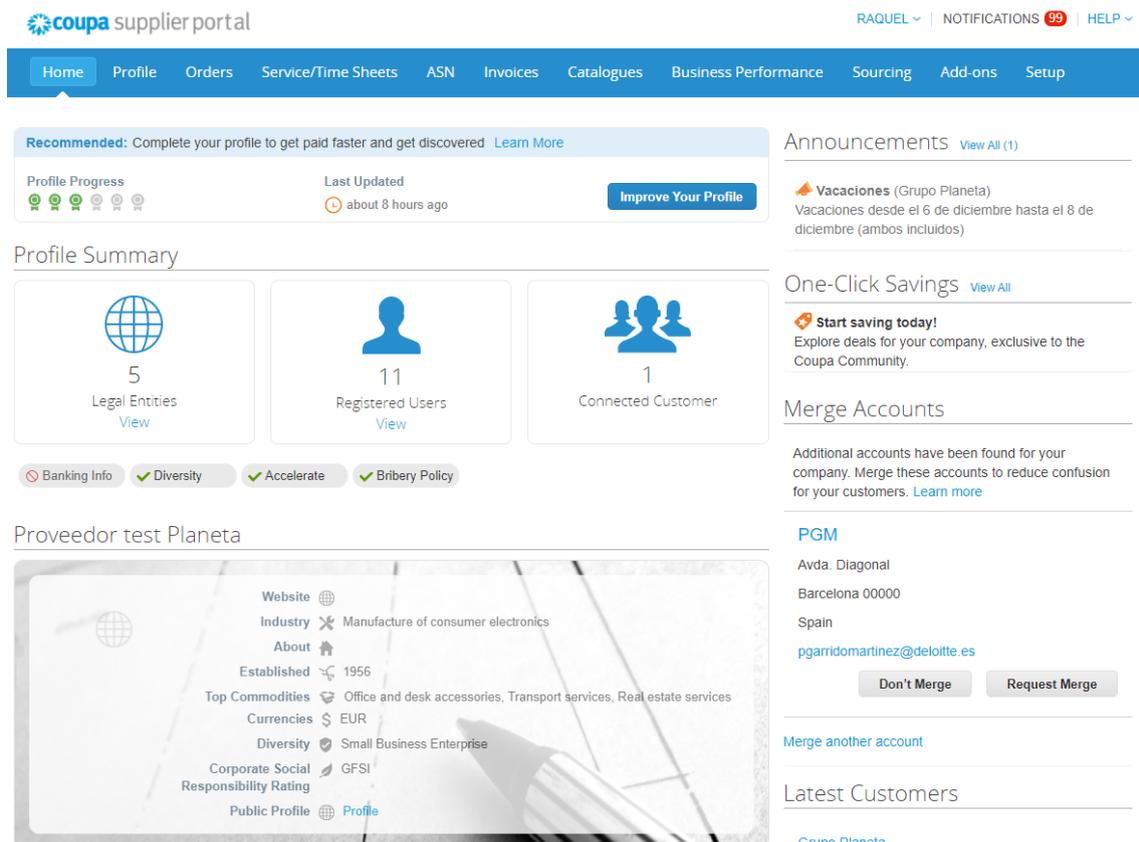
- At least one award, distinction or project

- Anti-Bribery and Corruption Policy
- Corporate Social Responsibility Classification

You can see a summary of your profile information on the Home page. The top section shows the degree of complete profile information (indicated by the badges filled in Profile Progress) and when the profile was last updated. Click the "Enhance Profile" button to view the profile.

The "Profile Summary" section uses icons to summarize the number of legal entities, registered users and connected customers that your company has, in addition to whether it has banking information, has information about diversity, uses static discounts (accelerate) and has a bribery policy. You can click on the "View" button of the Legal Entities and Registered User icons that will redirect you to open those sections to the Settings tab > Administrator, where you can manage these records.

The last section summarizes your profile information. By clicking on the "Profile" link in the "Public profile" section, you can see a preview of how customers see your profile.



The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The user is identified as RAQUEL, with 99 notifications and a help menu.

Recommended: Complete your profile to get paid faster and get discovered. [Learn More](#)

Profile Progress: Indicated by five green and grey circular icons. **Last Updated:** about 8 hours ago. [Improve Your Profile](#)

Profile Summary:

- Legal Entities:** 5 (View)
- Registered Users:** 11 (View)
- Connected Customer:** 1 (View)

Additional profile features: Banking Info (disabled), Diversity (checked), Accelerate (checked), Bribery Policy (checked).

Announcements: View All (1). **Vacaciones (Grupo Planeta):** Vacaciones desde el 6 de diciembre hasta el 8 de diciembre (ambos incluidos).

One-Click Savings: View All. **Start saving today!** Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts: Additional accounts have been found for your company. Merge these accounts to reduce confusion for your customers. [Learn more](#)

PGM: Avda. Diagonal, Barcelona 00000, Spain. Email: pgarridomartinez@deloitte.es. Buttons: Don't Merge, Request Merge.

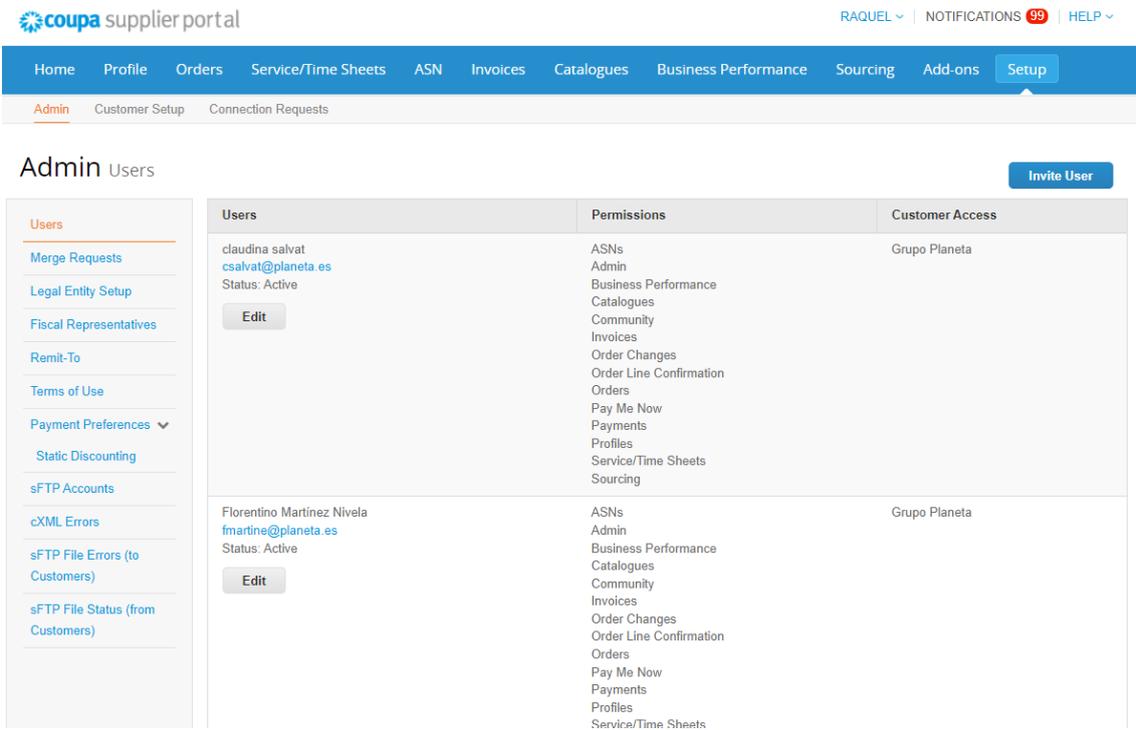
Proveedor test Planeta:

- Website:** [Profile](#)
- Industry:** Manufacture of consumer electronics
- About:** [About](#)
- Established:** 1956
- Top Commodities:** Office and desk accessories, Transport services, Real estate services
- Currencies:** EUR
- Diversity:** Small Business Enterprise
- Corporate Social Responsibility Rating:** GFSI

Latest Customers: [Grupo Planeta](#)

2.3 Admin

Click on the "Setup" tab of the main menu. It will appear on the Administrator Users page.



The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup' (which is highlighted). Below this, there are sub-menus for 'Admin', 'Customer Setup', and 'Connection Requests'. The main content area is titled 'Admin Users' and features an 'Invite User' button. A sidebar on the left lists various setup options like 'Merge Requests', 'Legal Entity Setup', etc. The main table displays two users:

Users	Permissions	Customer Access
claudina salvat csalvat@planeta.es Status: Active [Edit]	ASNs Admin Business Performance Catalogues Community Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Grupo Planeta
Florentino Martínez Nivelá fmartine@planeta.es Status: Active [Edit]	ASNs Admin Business Performance Catalogues Community Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets	Grupo Planeta

Note: You cannot change the user's email address. If a user wants to change the email address, send them a new invitation by clicking on the "Invite user" button.

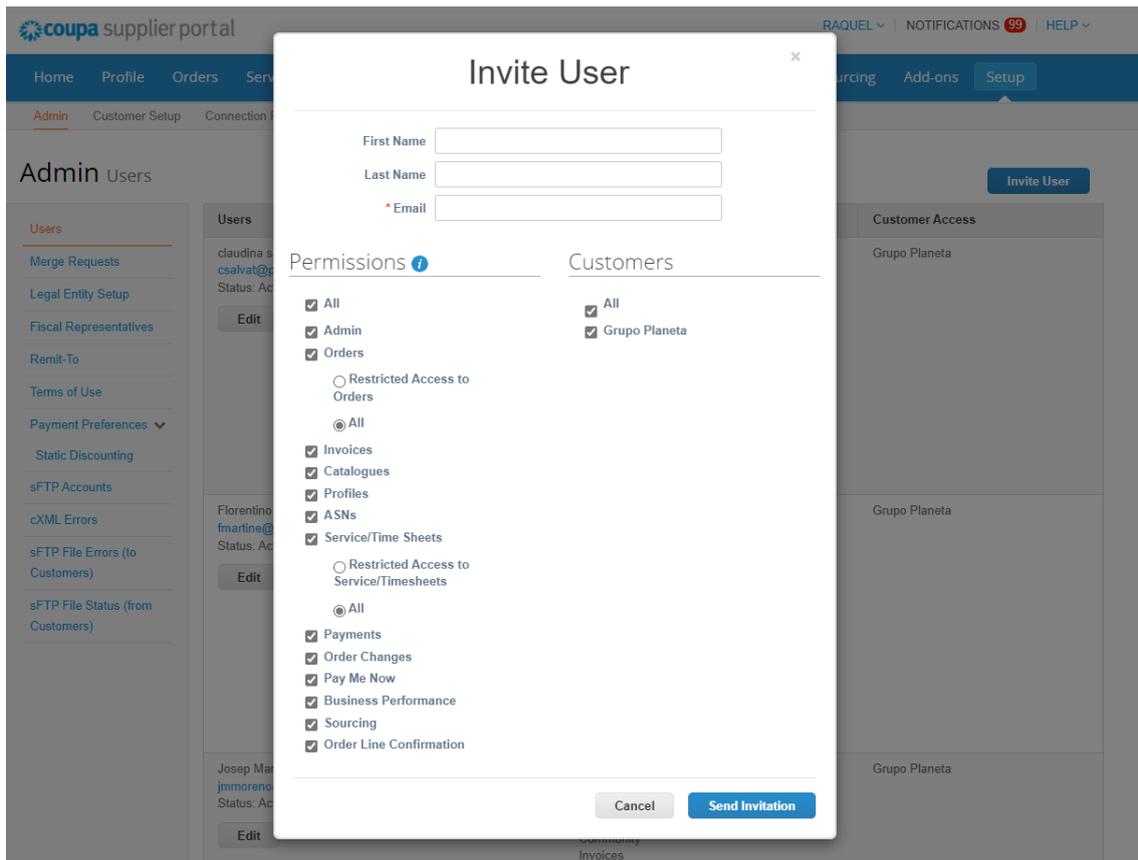
2.4 Users and permissions

Permissions grant users access to the corresponding menu items.

You can manage user permissions and client access by assigning certain users only to certain clients and limiting the types of documents they can access and the functions they can perform with assigned clients. You can also change the user's name, modify the user's permissions and client access, or deactivate the user.

Permissions	Description
All	It gives full access to all CSP features except user management.

Administrator	You have full access to all CSP features, including user management. Non-administrators can view the Users tab of the Administration page and invite users, but they cannot edit existing users. The permissions on the invitation cannot exceed the permissions of the user who creates the invitation.
Orders	Allows you to view and manage purchase orders (POs) received from customers. When selected, the "All" permission is enabled by default.
Restricted access to orders	Allows access to specific orders (assigned to specific users). The permission is disabled by default.
All	Allows you to view and manage all orders received from customers. When Orders is selected, it is enabled by default.
Bills	Allows you to create and send invoices to customers
Profiles	Allows you to modify the specific profiles of customers.
ASNs	Allows you to create and send advance shipping notices (ASNs) to customers.
Payments	Allows you to view payments and download digital checks.
Order changes	Allows you to send requests for change of order.
Company Performance	Allows you to view information about business performance, such as order trends, invoices, and deliveries.
Supply	Gives access to Sourcing events



Note: For auditing purposes, Coupa does not allow you to delete users, so you cannot remove a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

2.5 Merging accounts in the CSP

Your business may have more than one account/profile in the CSP. This can occur when multiple users from the same company register or are invited to the CSP through different email addresses.

Click on "Merge requests", add the email address and click on the "Request combination" button.

coupa supplier portal RAQUEL ▾ | NOTIFICATIONS 99 | HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup Connection Requests

Admin Merge Requests

Users

Merge Requests

Legal Entity Setup

Fiscal Representatives

Remit-To

Terms of Use

Payment Preferences ▾

Static Discounting

sFTP Accounts

cXML Errors

sFTP File Errors (to Customers)

sFTP File Status (from Customers)

Initiate Merge Request

I'm not a robot 

! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

[Request Merge](#)

Open merge requests

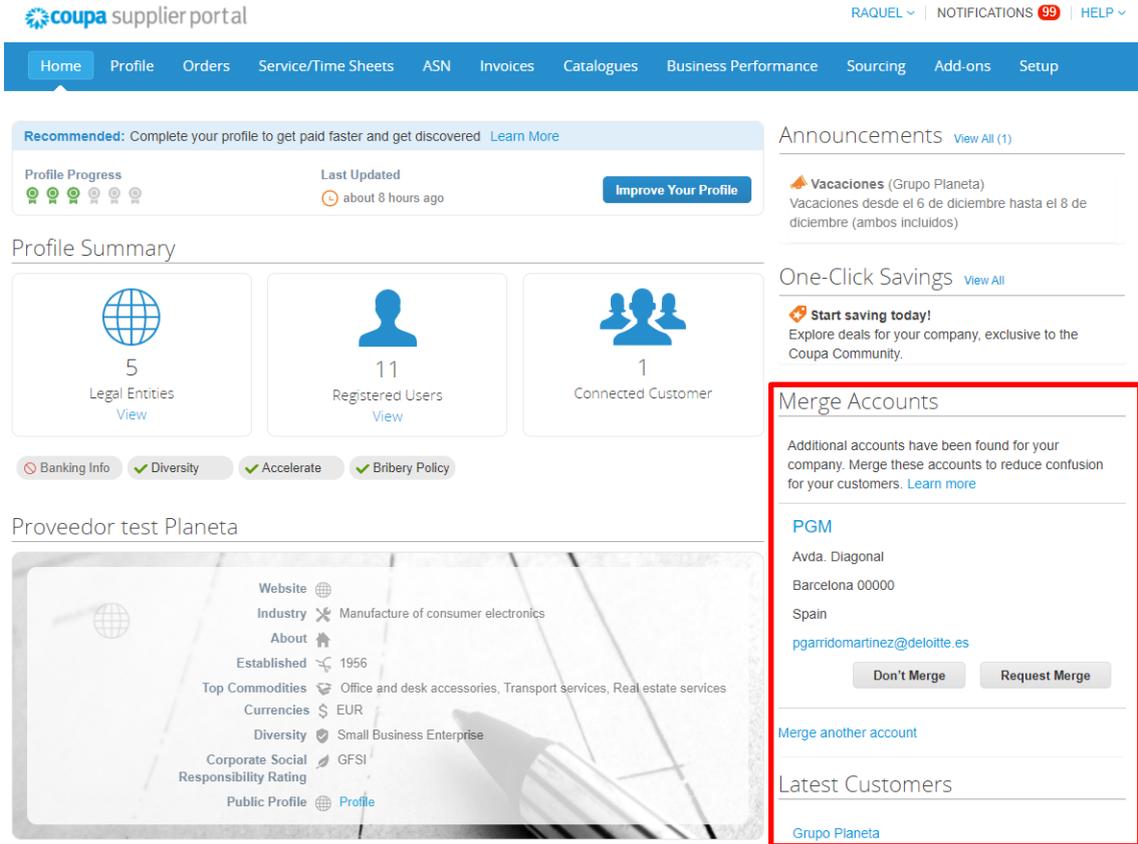
All clear! No open merge requests.

Note: Accounts with the same email address are automatically merged (regardless of which invitation message is used to create the account, as both invitations are sent to the same email address).

Suggestions for merging accounts are based on the email domain. For example, all users with the @**example**.com domain receive merge suggestions. Merge suggestions appear in the right column of the "Home" page.

IMPORTANT!

Account mergers cannot be undone. Be careful when merging accounts and be sure to verify that the account you are merging with is part of your company.



If you know a suggestion is invalid, click the **Don't Merge** button and you won't see the request again.

To merge an account, click the "Request Merge" button and select an account to be the primary account and add a note:

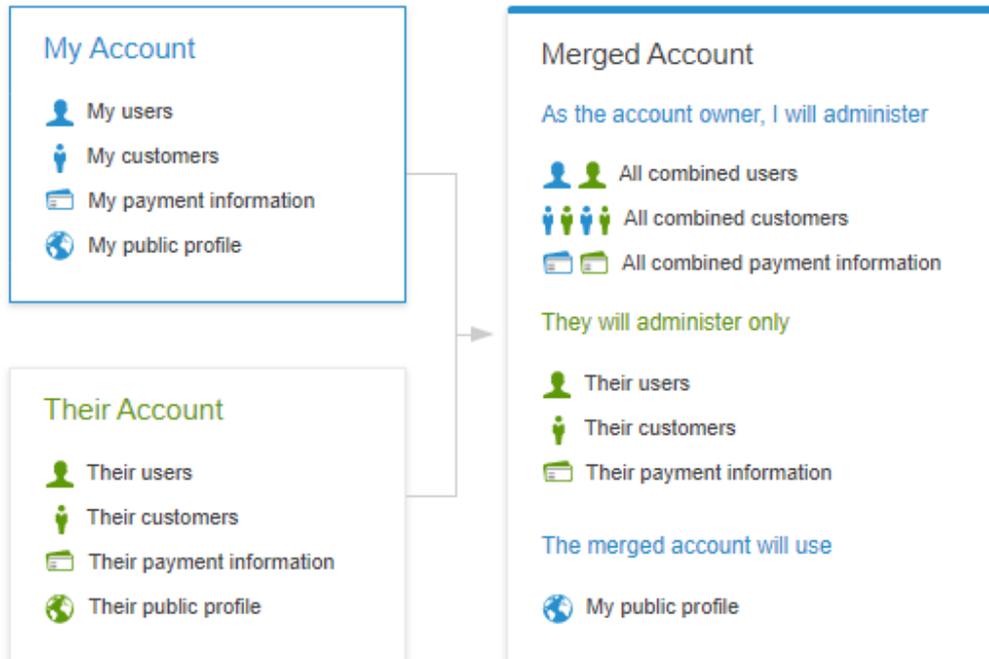
Selection	Description
*Account Owner / My Account	This causes the other account to merge with your company account. The other user's company account is deleted. You are still the administrator of the merged company account, and the previous administrator becomes a normal user in the merged account. You can also put him as an administrator.
*Account Owner / Other Account	The company account is deleted. The other user's company account becomes the only company account.

	The user to be merged can no longer be the administrator of the account, but the administrator of the existing account can choose to make him the administrator of the merged account.
*Note	Add a note about the merger request, for example, the reason for the merger of accounts.

In addition, the CSP shows you a visual representation of who controls what data after the merge.

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with **PGM**. Choose who will become the owner of the merged account.



- * Account Owner My Account
 Their Account

By choosing this option I understand that I will no longer be the account owner.

* Note For Recipient

 I'm not a robot  [reCAPTCHA Privacy - Terms](#)

! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

The account you are about to merge with has an sFTP account set up for automatic invoice download for customers using CaaS. Please add a new sFTP account if you wish to continue receiving these downloads.

Cancel

Send Request

Merger behavior

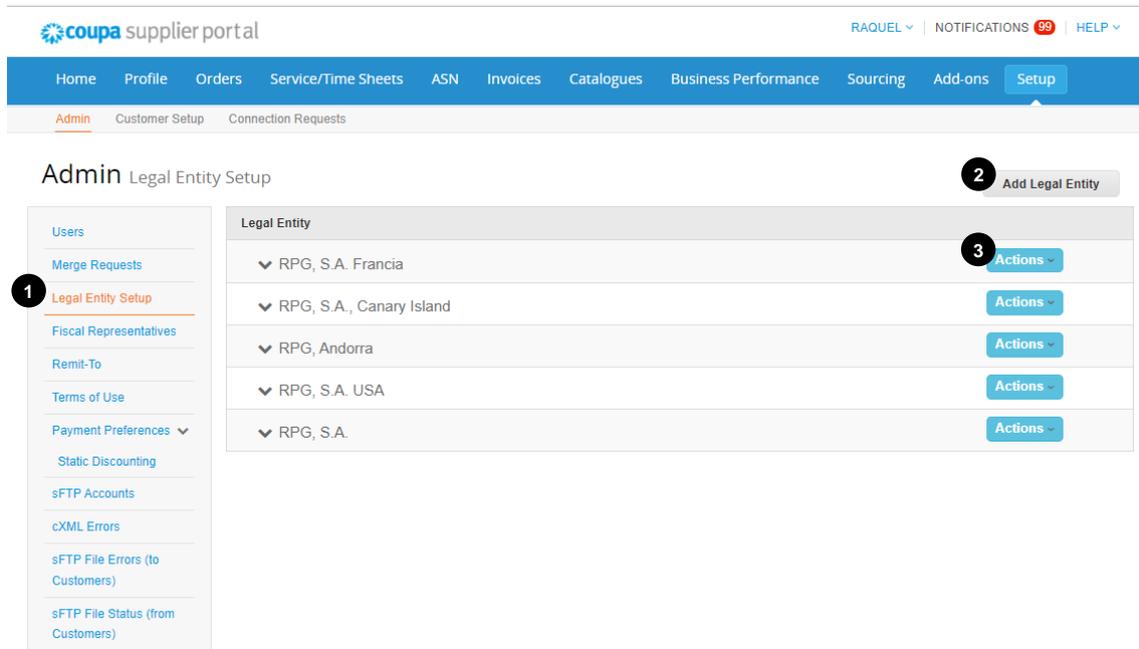
When you merge accounts, you select the account that becomes the owner of the account. After merging the accounts, in most cases, the new account owner can manage the data of both their account and the merged account, while the merged account owner can only manage the data that originally existed in the merged account. You can see more information in the following table.

In this example, provider A and provider B merge their accounts, and provider A becomes the owner of the account. When the CSP merges accounts, it uses the following merger rules:

Section	Provider A	Provider B
Account settings	Use provider A settings.	Use provider B settings
Connected clients	You can manage both Provider A's and Provider B's customers.	You can only manage provider B's clients.
Connection requests	Both Provider A's and Provider B's connection suggestions appear on the Client Connection Request screen. If the same customer was approved on one account and rejected on the other, the approved connection is displayed, regardless of the approved or rejected account.	
Discount preferences (global)	Provider A settings are used.	
Discount preferences (customer-specific)	Provider A can manage and assign discount preferences for both Provider A and Provider B.	You can only manage and assign discount preferences for provider B.
Legal entities	Provider A can manage and assign both provider A's and provider B's legal entities.	You can only manage and assign the legal entities of provider B.
Public profile	Provider A's profile appears.	
Recipient Accounts (Remit-To)	You can manage both provider A's and provider B's recipient accounts.	you can only manage recipient accounts from provider b
Users	You can manage users for provider A and provider B.	you can only manage users of provider b

2.6 Electronic Invoicing Settings: Legal Entity Configuration

Go to the "Settings" tab and click administrator to fill in the details of the legal entity.



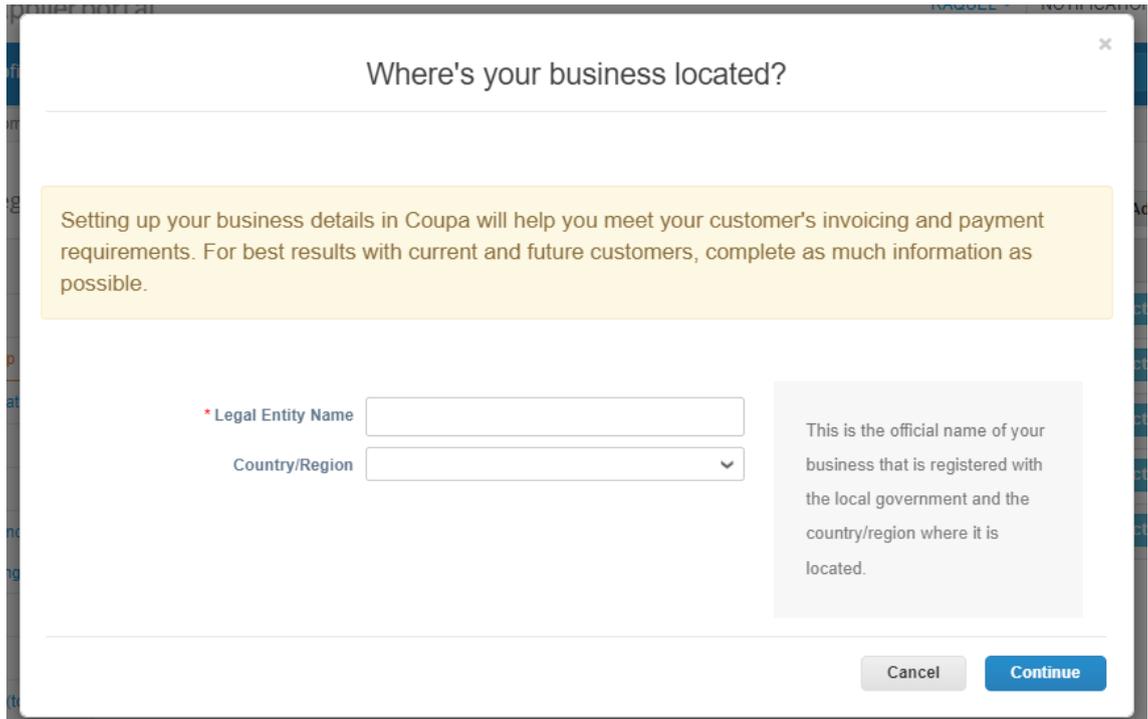
1. "Legal Entity Setup" is available to administrators only. The user who created the account will have administrator permissions.
2. Click on "Add Legal Entity" to create legal entities, add tax information, and set billing and shipping addresses.
3. Any legal entity can be managed at any time by clicking on the "Actions" button and choosing any of the options shown in the image. If there is an error or an update required in your Legal Entity (for example, change of legal address of the company), you must deactivate the wrong Legal Entity and repeat the process from the beginning to recreate the legal entity.

All the data reported in the structure of the legal entity pass to the legal invoice that COUPA creates on your behalf. Therefore **it is very important that this information is accurate.**

The steps to follow for the correct generation are:

1. Add the name of your company's legal entity and select the country. This is the official name of the company that is registered with the local authorities and in the country in which it is located. The CSP itself will direct you to complete your company's billing information that is mandatory to move forward with the functionality of the CSP

Then, select Continue.



Where's your business located?

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.

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

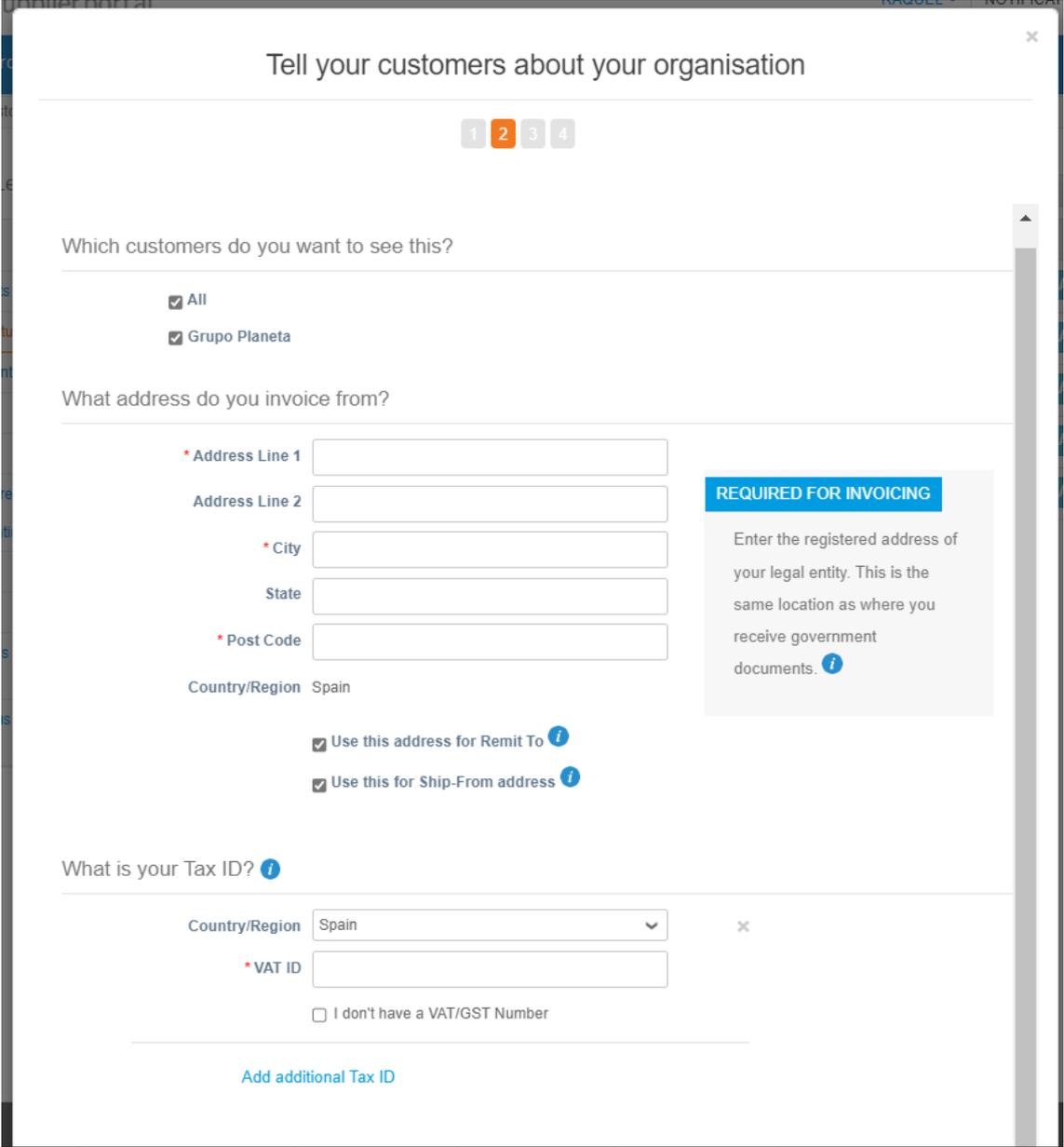
Cancel Continue

! VERY IMPORTANT!

In order to start generating invoices, you must first complete the configuration of the electronic invoicing and all the details of Legal Entity. Do not forget that you have to create in the CSP exactly the same legal address (Address and identification Number for VAT purposes) that you have already communicated to Grupo Planeta.

Please note that the information you provide in your e-invoicing settings will be used in the invoice creation process and will be included in your invoices at Grupo Planeta (except bank details).

2. Select "Grupo Planeta" as a customer who can see your company's information or "Everything" so that the information is visible to other customers. Then add a billing address. If this address is to be used as the recipient address (Remit- To) and/or shipping, select the corresponding checkboxes.



Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

All

Grupo Planeta

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Post Code

Country/Region Spain

Use this address for Remit To *i*

Use this for Ship-From address *i*

REQUIRED FOR INVOICING

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

What is your Tax ID? *i*

Country/Region Spain

* VAT ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

3. Add the local tax country (headquarters) and VAT identification number (CIF)/GST (Good Services Tax) of the country, **it is a required field**. If you are registered with VAT/GST in other countries also click on "Add Additional Tax ID" and add the corresponding country/VAT ID details.

If you are registered for VAT purposes, make sure your VAT registration number is correct and relates to the specified country. COUPA will use this information to generate a tax invoice on your behalf.

Exceptionally, if you do not have a VAT / GST VAT identification (CIF) / GST (Good Services Tax) number you can check the box "I would like to use it as a local tax number" and complete the field of the local tax identification number.

The "Miscellaneous" section will only need to be completed for the cXML

transmission of invoices:

- a) Invoice from Code: Code to link your CSP Invoice From address to the corresponding cXML invoice address – It will be included in the cXML as an Address ID.
- b) Select preferred language.

Once completed, click on the "Save and Continue" button.

What is your Tax ID? 

Country/Region  

* VAT ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code 

Preferred Language 

4. On the next screen (3) select "Bank account" from the "Payment type" drop-down list. Complete this section with your bank details. Banking information will not be displayed on the invoice.

×

Where do you want to receive payment?

1
2
3
4

*** Payment Type** Bank Account ▾

What are your Bank Account Details? i

Bank Account Spain ▾

Country/Region:

Bank Account Currency: EUR ▾

Beneficiary Name: MLG, S.A

Bank Name:

IBAN: i

Confirm IBAN:

SWIFT/BIC Code: i

Bank Account Type: Business ▾

Supporting Documents Choose Files No file chosen i

What is your Bank's Branch Address?

Address Line 1:

Address Line 2:

City:

State:

Postcode:

Who is your Remit-To Contact? (optional) >

The shipping address to sender that appears in the section What is the address "Send to"? it will be completed automatically if you checked the box "Use this address for shipping" in step 2 above.

×

Where do you want to receive payment?

1
2
3
4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account MLG, S.A	xxxx xxx 08036 Spain	Active	Manage

Deactivate Legal Entity
Cancel
Next

1. Click on "Add Remit-to" if you want to add another sender account where you can receive payments.
2. Slide the cursor to the lower right corner and select "Next".

On the next screen (4) Where do you ship goods from? It is where if you send goods from a location other than the address indicated on the invoice you must add the shipping address by going to the "Add Send from" button. However, if the address is the same as the invoice address, click "Done" to finish the legal entity setup process.

×

Where do you ship goods from?

1
2
3
4

For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
xxxx xxx 08036 Spain	Active	Manage

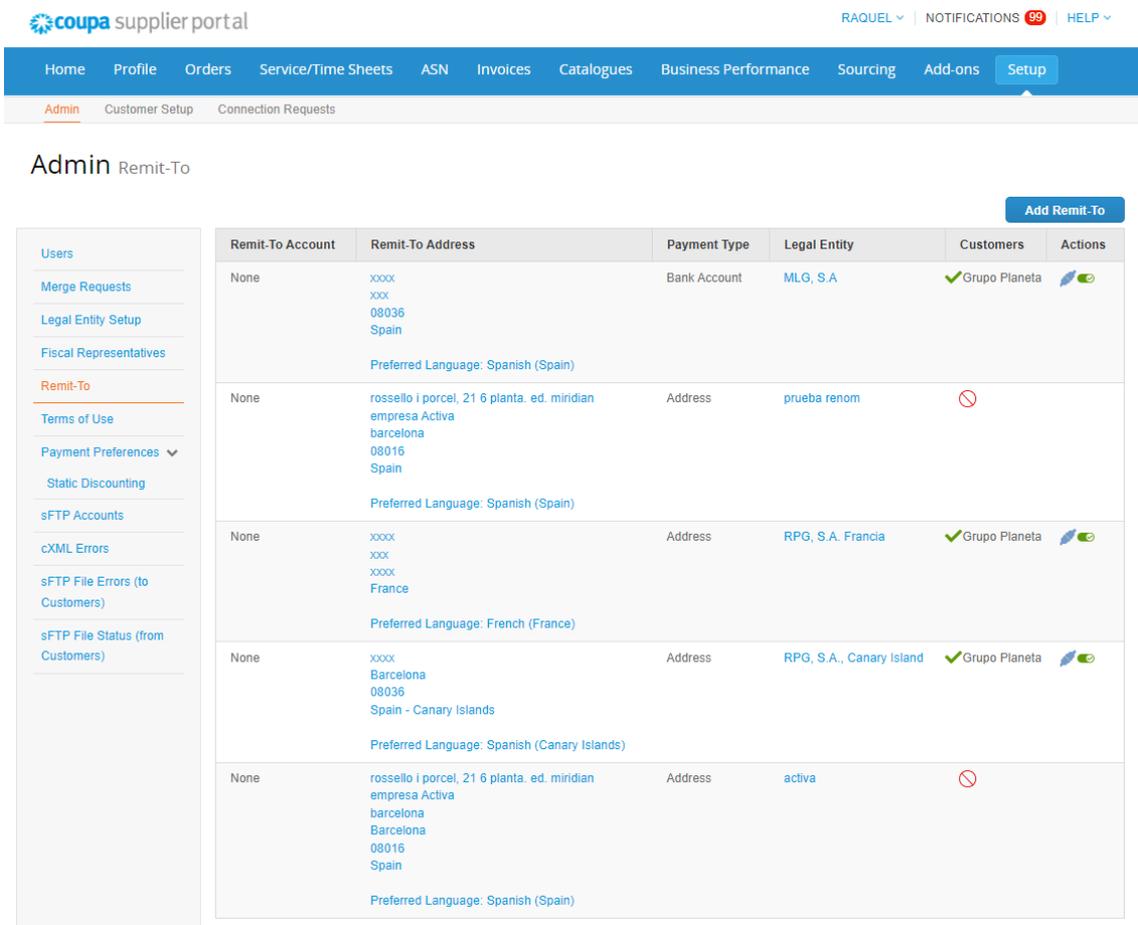
Deactivate Legal Entity
Done

It is important for tax purposes that it is reflected from where the products are shipped when it is different from the legally registered country. For example, if you are registered in the UK but ship goods from a warehouse in Poland, be sure to add this address here to accurately reflect it when it comes to creating invoices.

If you generate an invoice with a VAT ID that differs from the VAT ID displayed with your COUPA legal entity information (i.e. the VAT number issued by your country of residence/incorporation), you will need to add an additional VAT ID against your legal entity.

2.7 Management of the addresses for the legal invoice

An invoice must include a recipient address (Remit - To Address) and the associated tax information. Swipe to the left of the "Administrator" section, click the "Refer to" link to see the list of recipient addresses and their details, for example, the customers to whom they are assigned.



coupa supplier portal RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup Connection Requests

Admin Remit-To

[Add Remit-To](#)

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	xxxx xxx 08036 Spain Preferred Language: Spanish (Spain)	Bank Account	MLG, S.A	✓ Grupo Planeta	 
None	rossello i porcel, 21 6 planta. ed. miridian empresa Activa barcelona 08016 Spain Preferred Language: Spanish (Spain)	Address	prueba renom	⊘	
None	xxxx xxx xxxx France Preferred Language: French (France)	Address	RPG, S.A. Francia	✓ Grupo Planeta	 
None	xxxx Barcelona 08036 Spain - Canary Islands Preferred Language: Spanish (Canary Islands)	Address	RPG, S.A., Canary Island	✓ Grupo Planeta	 
None	rossello i porcel, 21 6 planta. ed. miridian empresa Activa barcelona Barcelona 08016 Spain Preferred Language: Spanish (Spain)	Address	activa	⊘	

2.8 Terms of Use

You can find the terms of use in the "Administrator" tab in the "Terms of Use" section.

As part of Coupa's terms and conditions, you explicitly agree that Coupa issues invoices on your behalf. From a VAT point of view, for countries where Coupa creates legal invoices it means that the PDF generated by Coupa is your legal invoice.

coupa supplier portal RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons **Setup**

Admin Customer Setup Connection Requests

Admin Terms of Use

Select Customer: Grupo Planeta

Acceptance Required

Acceptance History

1. [Terms of Use](#) accepted by Proveedor test Planeta on 03/06/2021 at 20:12

2.9 Payment preferences. Static discount

In this section you can establish the preferential payment conditions (discount conditions for prompt payment) that will apply to any of your customers on all their invoices.

 supplier portal RAQUEL ▾ | NOTIFICATIONS 99 | HELP ▾

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogues
Business Performance
Sourcing
Add-ons
Setup

Admin
Customer Setup
Connection Requests

Admin Static Discounting

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
- Static Discounting
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

Set your static discounting preferences here before you submit any invoices and Coupa will automatically update payment terms on future invoices based on these settings. You can define global settings, which will apply to all your buyers using Static discounting, or set unique settings for a particular buyer, which will override the global settings. Use this setting if you want to offer discounts on all Future Invoices that you submit to your buyer. Email accelerate@coupa.com if you need any assistance.

All Customers

Your original payment term	Your preferred term	Edit
Net 30	None	
Net 45	None	
Net 60	None	
Net 75	None	
Net 90	None	
Net 120	None	
Approver name Raquel		
Approver email rpereiraguiadanes@deloitte.es		
Apply static discounting preference to all invoices		Yes

2.10 sFTP accounts

In the "sFTP accounts" section, you can create and manage SFTP accounts to upload invoices quickly.

 supplier portal RAQUEL ▾ | NOTIFICATIONS 99 | HELP ▾

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogues
Business Performance
Sourcing
Add-ons
Setup

Admin
Customer Setup
Connection Requests

Admin

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
- Static Discounting
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

sFTP Data to Customers

This option allows you to create an sFTP to send invoices to your customers who have elected to provide this service.

Select Customer Grupo Planeta ▾

Note
sFTP account management feature is not available, please contact your Coupa administrator

sFTP Data from Customers

This option allows you to add a connection to your sFTP to receive invoices from selected customers subscribed to Coupa's compliance as a service offering. Contact your customer for more information. [View customers using this service](#)

Add

Username	Server	Action
No results found		

2.11 cXML errors

Get cXML error notifications and view the list of cXML errors to ensure proper operation and better handling of cXML transmission failures.

coupa supplier portal RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup Connection Requests

Admin

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences
- Static Discounting
- sFTP Accounts
- cXML Errors**
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

cXML Errors Select Customer: Grupo Planeta

cXML purchase order

Purchase Order Invoice

View: All Advanced Search

Document ID	PO Number	Created Date	Category	Request error	Response error
Nothing matching your search was found.					

Per page: 15 | 45 | 90

2.12 sFTP errors

Look at the list of SFTP file upload (CSV) errors to ensure proper submission and better management of SFTP transmission failures.

coupa supplier portal RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup Connection Requests

Admin

- Users
- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences
- Static Discounting
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)**
- sFTP File Status (from Customers)

SFTP File Errors (to Customers) Select Customer: Grupo Planeta

SFTP File Upload Errors

Export to Search

File Name	Created Date	Upload Errors
No rows.		

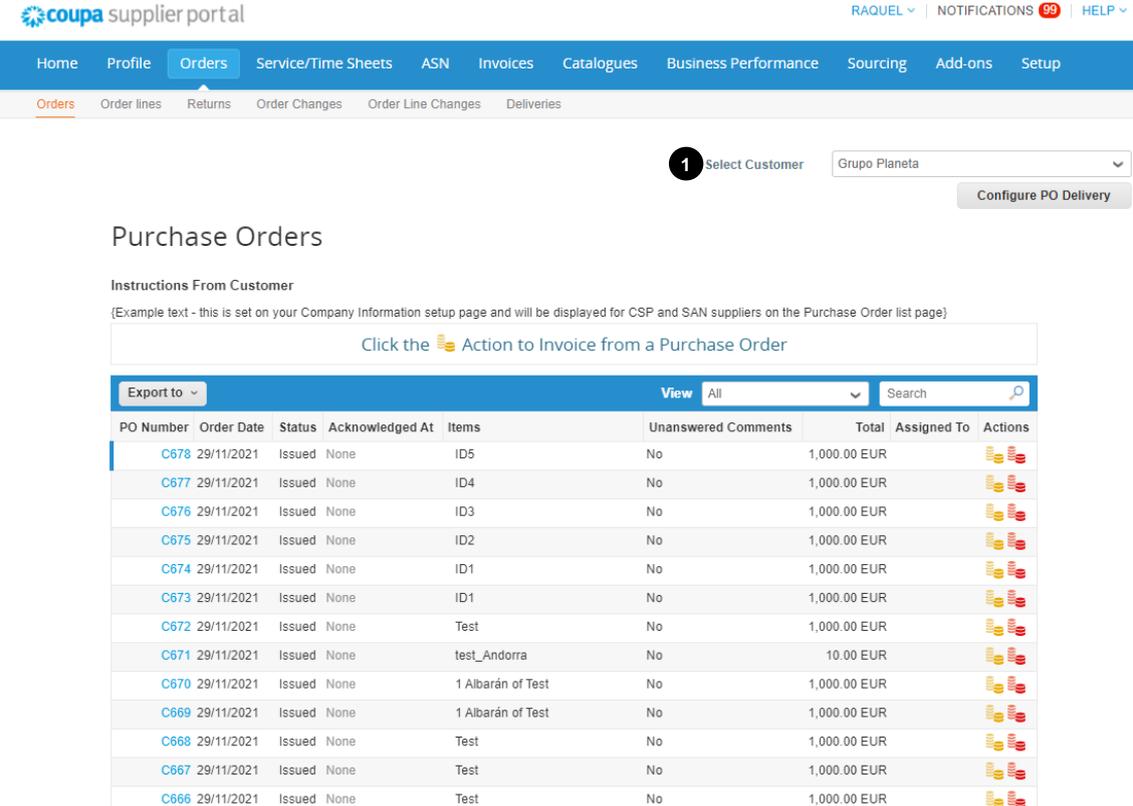
Per page: 15 | 45 | 90

3. Management of orders/invoices via CSP

The following section details the operation in the tool in terms of the management of orders, invoices and credit notes. For the management of the purchase orders of the Planeta Group it is required to have created a Coupa account as explained in section 2 of "Introduction to COUPA"

3.1 Order management

The "Orders" tab is where Grupo Planeta's orders are located. When Grupo Planeta issues an order you will receive a notification in the CSP and / or a message in your email address in the case that you have parameterized it in "Notification preferences".



coupa supplier portal RAQUEL | NOTIFICATIONS 99 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Deliveries

1 Select Customer

Purchase Orders

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C678	29/11/2021	Issued	None	ID5	No	1,000.00 EUR		 
C677	29/11/2021	Issued	None	ID4	No	1,000.00 EUR		 
C676	29/11/2021	Issued	None	ID3	No	1,000.00 EUR		 
C675	29/11/2021	Issued	None	ID2	No	1,000.00 EUR		 
C674	29/11/2021	Issued	None	ID1	No	1,000.00 EUR		 
C673	29/11/2021	Issued	None	ID1	No	1,000.00 EUR		 
C672	29/11/2021	Issued	None	Test	No	1,000.00 EUR		 
C671	29/11/2021	Issued	None	test_Andorra	No	10.00 EUR		 
C670	29/11/2021	Issued	None	1 Albarán of Test	No	1,000.00 EUR		 
C669	29/11/2021	Issued	None	1 Albarán of Test	No	1,000.00 EUR		 
C668	29/11/2021	Issued	None	Test	No	1,000.00 EUR		 
C667	29/11/2021	Issued	None	Test	No	1,000.00 EUR		 
C666	29/11/2021	Issued	None	Test	No	1,000.00 EUR		 

1. If you work with several clients in COUPA, in the "Select client" field you must choose Grupo Planeta to filter only the orders of this client

If you have email notifications enabled for orders, you'll receive a notification for any new orders.

Next, head to your inbox to open the email and click the "View Order" button. This will take you to the initial CSP screen where, after accessing your CSP account, you will be able to see the order.



After clicking on the purchase order number you select from the list, the system will display all the details of that purchase order.

3.2 Order structure in CSP

The order consists of the following fields:

Fields in the order	Description
State 1	Order Status ¹
Order date 2	Date on which the order was created
Revision date 3	Date on which the order was reviewed. If the order has no revisions this will be the same as the Order Date
Requester 4	Name of the requester
Email 5	Applicant's email
Payment term 6	Payment term agreed between the supplier and Grupo Planeta
Attachment 7	Applicant attachments (e.g. additional information, documents...)
Confirmed 8	Allows you to recognize the order
Assigned to 9	Assign this order to a user who is configured in the CSP account

Ship-To Address 10	Shipping address
Terms 11	Shipping Terms
Lines 12	Information by line of each order
Print view 13	The print view allows you to view a printable version of the legal order that also includes terms and conditions.
Create invoice 14	Allows you to convert the order into an invoice
Add comments 15	Allows you to comment on a particular order. The comments will be automatically sent to Grupo Planeta and will be visible in the order by both parties.
History 16	Expand to view records of all order activities

Order Status ¹	Description
Issued	Order shipped successfully, expiration date has not passed
Defeated	For an issued order, if the expiration date has passed and the order is not complete
Un recognized	Displayed only if you recognize at least one order in the past and do not recognize this specific order
Change Request	Orders for which you or Grupo Planeta has requested a change
Un-billed	Orders you haven't billed yet

Select Customer Configure PO Delivery

Purchase Order #C683

- 1 Status Issued - Sent via Email
- 2 Order Date 30/11/2021
- 3 Revision Date 30/11/2021
- 4 Requester Raquel Pereira
- 5 Email rpereiraguadianes@deloitte.es
- 6 Payment Term 90
- 7 Attachments None
- 8 Acknowledged
- 9 Assigned to

Shipping

10 Ship-To Address C/ JUAN IGNACIO LUCA DE TENA 17
28027 MADRID ESPAÑA
Spain
Attn: Raquel Pereira

11 Terms None + Add

Shipment Tracking + Add

No delivery tracking.

12 **Lines**

		Advanced	Search	Sort by	Line Number: 0 → 9 ▾
1	Type Item	Price	Total	Invoiced	
	test	10.00	10.00	0.00	
	Part Number	Manufacturer Name	Manufacturer Part Number		
	None	None	None		

Per page 15 | 45 | 90

Total EUR 10.00

- 14 Create Invoice
- Request Change
- Save
- 13 Print View

15 **Comments** Mute Comments ▾

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

Add Comment

16 **History** ▾

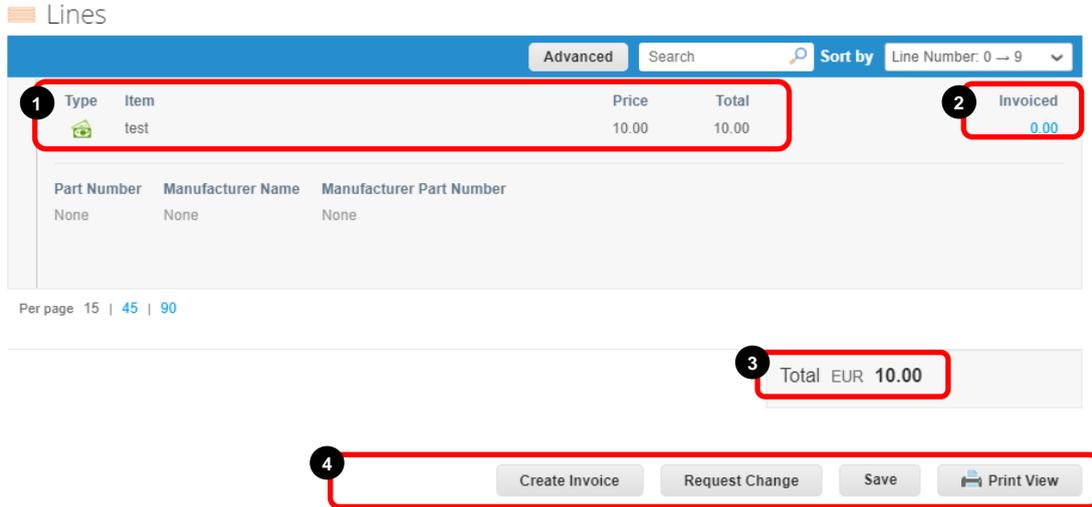
PLANETA INNOVACIÓN, S.A. User On 30/11/2021 at 19:16
Purchase order C683 Created

Once the purchase order is reviewed, be sure to confirm it

¡! IMPORTANT ¡!

If you have any comments or considerations on any of the aspects of the Purchase Order, please send your inquiries in the Comments section (15) mentioning the applicant @name (e.g. @JohnSmith).

3.3 Displaying Purchase Orders



The screenshot shows the 'Lines' interface with the following data:

Type	Item	Price	Total	Invoiced
	test	10.00	10.00	0.00

Summary: Total EUR 10.00

Buttons: Create Invoice, Request Change, Save, Print View

At the line level, you will be able to see all the detailed elements of the purchase order:

1. Display of the product description, quantity, units, price and total amount.
2. Display of the amount already invoiced -if any- for that purchase order.
3. Display of the total value of the entire purchase order
4. Buttons to perform actions:
 - a) Click Create Invoice to convert the purchase order to an invoice. (See how to do this in sections 3.4 to 3.6 of this manual)
 - b) To get a PDF version, click Print Preview
 - c) If you want to make a change in the purchase order (price, quantity...), click on the Change Request button

3.4 Custom views for reporting

With a custom view, you can create a set of advanced search filters to generate the reports you want.

Custom views of the following can be created: orders, order lines, order changes, order line changes, invoices, catalogs, invoice payments.

coupa supplier portal RAQUEL | NOTIFICATIONS **99+** | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Deliveries

Select Customer Configure PO Delivery

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered	Total	Assigned To	Actions
C683	30/11/2021	Issued	None	test	No		JR	
C678	29/11/2021	Issued	None	ID5	No		JR	
C677	29/11/2021	Issued	None	ID4	No		JR	
C676	29/11/2021	Issued	None	ID3	No		JR	
C675	29/11/2021	Issued	None	ID2	No		JR	
C674	29/11/2021	Issued	None	ID1	No		JR	
C673	29/11/2021	Issued	None	ID1	No		JR	
C672	29/11/2021	Issued	None	Test	No		JR	
C671	29/11/2021	Issued	None	test_Andorra	No		JR	
C670	29/11/2021	Issued	None	1 Albarán of Test	No		JR	
C669	29/11/2021	Issued	None	1 Albarán of Test	No		JR	
C668	29/11/2021	Issued	None	Test	No	1,000.00 EUR	JR	
C667	29/11/2021	Issued	None	Test	No	1,000.00 EUR	JR	
C666	29/11/2021	Issued	None	Test	No	1,000.00 EUR	JR	
C665	29/11/2021	Issued	None	Test	No	1,000.00 EUR	JR	
C664	29/11/2021	Issued	None	Test	No	1,000.00 EUR	JR	

1. Move the cursor to the "View" field and in the menu that unfolds select "Create view"

To create a view, you must define:

1 Name

2 Select Customer

3 Visibility Only Me Everyone

4 Start with view

5 Conditions

Match Conditions

6 Add group of conditions

Filter By Filter Clause Filter Text

7 Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

Available columns	Selected columns
Comments	PO Number
Payment Agreements	Order Date
PO ID	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Assigned To
	Actions

8 Default Sort Order

Sort by in order.

9

1. Name: Sets a name for the report (must be less than 30 characters).
2. Select Customer: Allows you to select orders for a specific customer. Select Planet Group.
3. Visibility: Choose who can see your report. If you select "Only me", this report will only be visible to you. If you select "Everyone," everyone else in your organization will be able to see your report.
4. Start with view: You use this option to load settings for another view.

You can then modify it to suit the needs of the new view to be created.

5. Conditions: Select "Match all conditions" or "Match at least one condition" to identify whether you want your report to show results that contain all the conditions you set or results that meet any conditions.
6. Add group of conditions:

Allows you to add groups of conditions, for example set the conditions to filter by date and filter by state.

7. Columns: Drag and drop fields from the "Available Columns" section to the "Selected Columns" section. You can drag and drop the fields and reorder them based on how you want the

report to be displayed. All "Selected Columns" fields will be viewed in the report.

8. Default sort order: Allows you to sort data by specific criteria.
9. Once you have the report ready, scroll with your cursor to the lower right corner of the screen and click "Save".

Once you've saved the view, you can click "Export To" to export the report to a CSV or Excel file type:

Purchase Orders

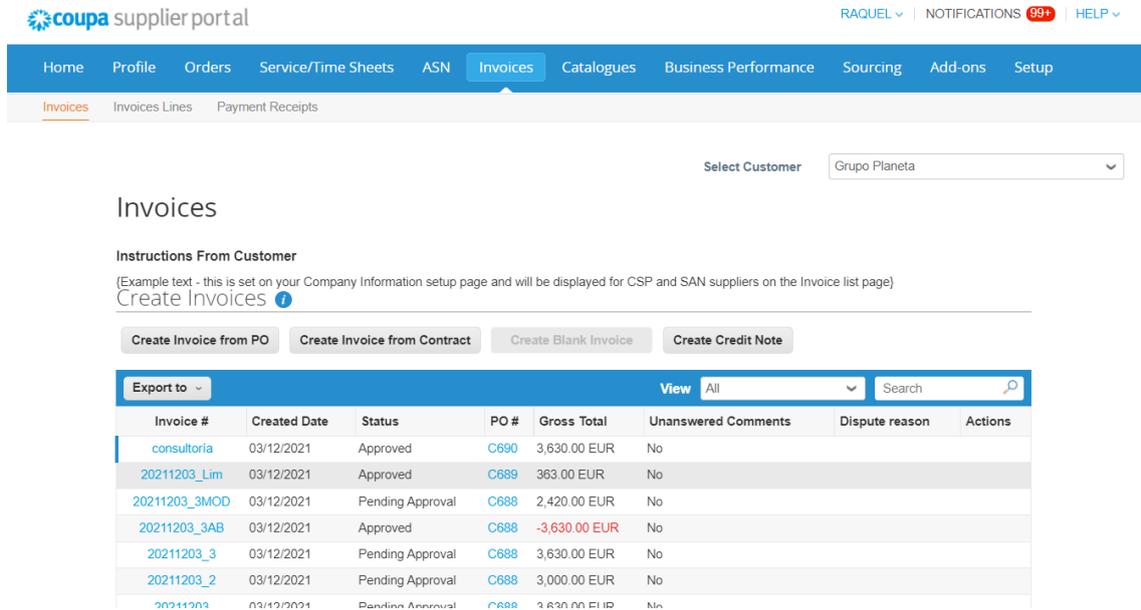
Instructions From Customer
 (Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Invoice from a Purchase Order

Export to	View	All	Search	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CSV plain (current columns)				None	300 Hours of Consultoria	No	3,000.00 EUR		
CSV for Excel (current columns)				None	20 Hours of Servicio de limpieza	No	300.00 EUR		
Excel (current columns)				None	300 Hours of Consultoria	No	3,000.00 EUR		
C688 03/12/2021	Issued	None							

3.5 Invoice management

The "Invoices" tab is where the invoices sent to Grupo Planeta are located. You can create an invoice directly in this tab by selecting "Create invoice from purchase order".



Below are the different States through which you can pass the bill:

Invoice status	Description
Draft	Invoices that have been created but have not yet been sent to Grupo Planeta
Pending approval	Invoices that have not yet been approved by Grupo Planeta
Processed	Invoices that are being processed by the Accounts Payable department of Grupo Planeta.
Approved	Invoices that have been accepted for payment by Grupo Planeta
Expired	Invoices that have not yet been paid and that have reached the due date
Contested	Invoices that you or Grupo Planeta have marked as contested to indicate a discrepancy in the invoice
Suspended	The contested invoice has been suspended. Grupo Planeta can notify you about this change in invoice status and give you

	instructions. You can set notification preferences for suspended invoices
Invalidated	Specific for compatible electronic invoices for countries of dispatch, for example, Mexico. Indicate that a CFDI (Mexican legal invoice form) you have submitted is not validated. Invoices with this status are visible only to you, not to Grupo Planeta

1. To review payment information in real time, select the "Payment information" view

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Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer Grupo Planeta

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)
 Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to **1** View Payment Information Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	52	2222	Approved	04/06/2021	90	04/06/2021	
No	48	111111	Draft	03/06/2021	90	03/06/2021	
Yes	48	3060	Approved	27/05/2021	90	27/05/2021	Payment# - on 07/01/2021 for EUR 1,300.00
No	47	None	Draft	27/05/2021	90	27/05/2021	
No	46	None	Draft	27/05/2021	90	27/05/2021	
No	46	None	Draft	27/05/2021	90	27/05/2021	
No	46	None	Draft	27/05/2021	90	27/05/2021	
No	46	None	Draft	27/05/2021	90	27/05/2021	
No	47	None	Draft	27/05/2021	90	27/05/2021	
No	48	None	Draft	27/05/2021	90	27/05/2021	

3.6 Points to consider before creating an invoice in the CSP

- COUPA E-Invoicing is designed to enable compliance with the regulatory requirements imposed on the sending/receiving of electronic invoices by the respective tax jurisdictions in the admitted countries (see annex).
- For E-invoicing countries that comply with COUPA, according to the T&Cs (Terms and Conditions), COUPA will issue the legal invoices on your behalf. **Do not attach or issue to Grupo Planeta a copy of an invoice generated from your system.**

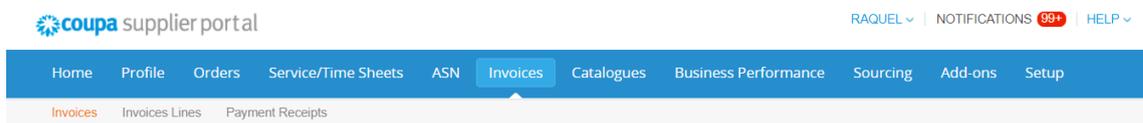
3.7 Creation and sending of invoices

- Please note that it is important that the VAT rate is correct depending on the supplies made and the place of supply for tax purposes.
- Please note that for E-invoicing countries that comply with COUPA, you must not

attach or issue to Grupo Planeta a copy of an invoice generated from your own billing system.

- Please note that you should not add a new line when creating invoices as this will cause a failure in the automatic conformation of the order and invoice.
- Please note that if you supply items where different VAT rates apply to the same order line, you must divide them into multiple invoices.

To create an invoice, from the "Invoices" tab select the "Create invoice from purchase order" button (1) or by selecting the yellow coins icon from the "Orders" tab (2). Previously, in the drop-down list located in the top right corner of the page **Bills**, select the customer for whom you will create or edit an invoice (or credit note if applicable) (3)



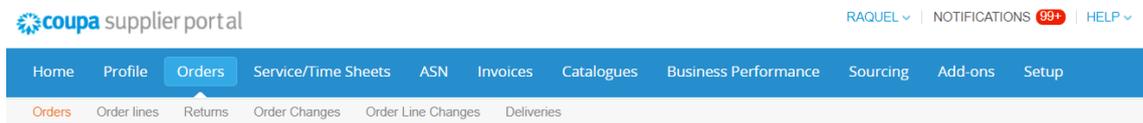
Invoices

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices 

- 1 Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note



Purchase Orders

Instructions From Customer

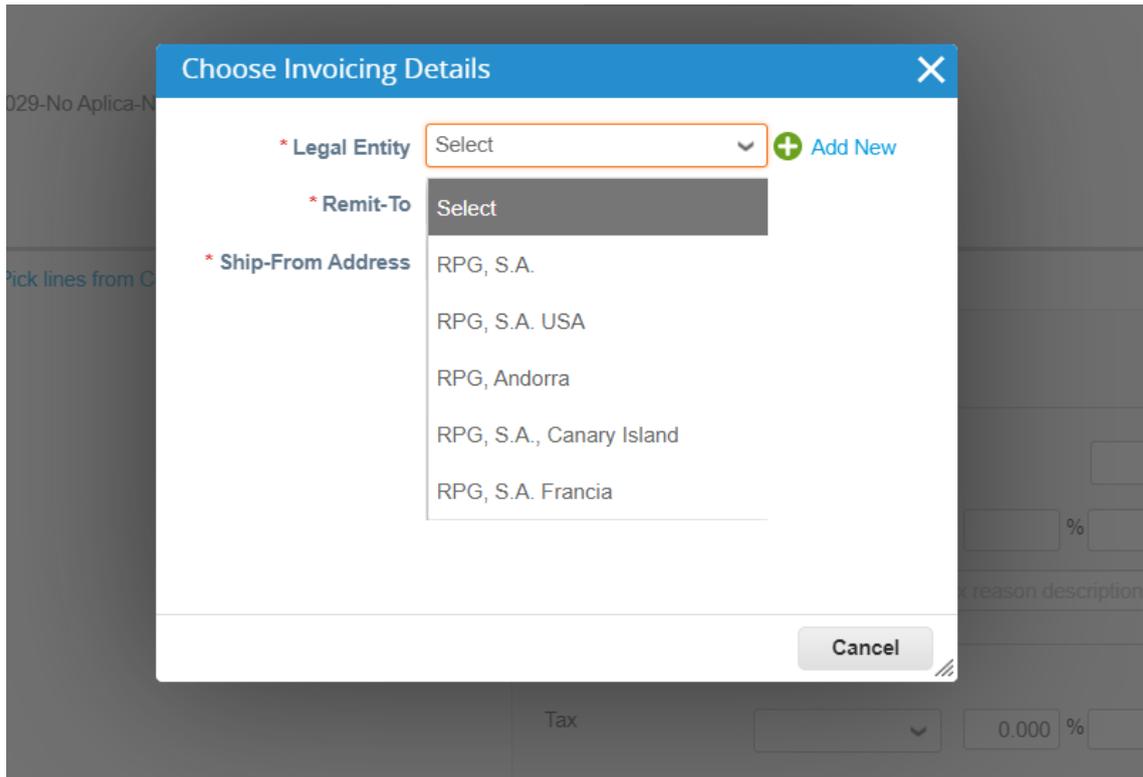
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C690	03/12/2021	Issued	None	300 Hours of Consultoria	No	3,000.00 EUR		2 
C689	03/12/2021	Issued	None	20 Hours of Servicio de limpieza	No	300.00 EUR		

The icon **Information** next to the title "Create invoices" indicates the steps to follow if you cannot create an invoice as intended; for example, you can contact your contact in Grupo Planeta to enable other billing options if applicable.

Next, you must select your legal entity (in the case that you have several legal entities) through the following screen:



Choose Invoicing Details

* Legal Entity Select + Add New

* Remit-To Select

* Ship-From Address

- RPG, S.A.
- RPG, S.A. USA
- RPG, Andorra
- RPG, S.A., Canary Island
- RPG, S.A. Francia

Cancel

NOTE

If you only have one legal entity, the previous selection screen will not appear and you will have your data established in the "From" section of the header of the invoice

The invoice has the following fields to complete (those marked with an asterisk (*) red are mandatory):

Create Invoice Create

General Info

1 * Invoice #

2 * Invoice Date 

3 Payment Term

4 * Currency

5 Delivery Number

6 Status

7 Supplier Note

8 Attachments  [Add File](#) | [URL](#) | [Text](#)

9 Cash Accounting Scheme

10 Margin Scheme

From

* Supplier

11 * Supplier VAT ID

* Invoice-From Address 

* Remit-To Address 

* Ship-From Address 

To

Customer

* Bill-To Address

12 * Buyer VAT ID

Ship To Address

13 Withholding tax

Please, put the withholding tax applied

- | | | |
|--|--|---|
| <p>1. Invoice #: Insert the generated invoice number into your billing ERP system.</p> <p>2. Invoice Date: Date of invoice creation.</p> <p>3. Payment term: The one that by default you have established in the order with Grupo Planeta.</p> <p>4. Currency: Insert the currency set in the order.</p> <p>5. Delivery number: Provides the delivery number, if applicable.</p> <p>6. Status: Check the</p> | <p>status of the invoice (see the types of Status in point 3.4 above)</p> <p>7. Supplier note: Insert comments for Grupo Planeta</p> <p>8. Attachments: Add any document relevant to the invoice</p> <p>9. Cash accounting scheme: Select "Yes" if your invoice is subject to cashier criteria.</p> <p>10. Margin scheme: Leave blank if it does not apply</p> | <p>11. Supplier VAT ID: This field will be reported by default but you only have a VAT ID configured for this legal entity. If you have multiple VAT identifiers, choose the VAT IDENTIFIER you previously set up in the "Legal Entity Settings" section under "Settings". If you have multiple VAT records, make sure you choose the correct VAT record based on the country in which you supplied your goods or services. COUPA applies</p> |
|--|--|---|

the invoicing rules based on the VAT registration country you have selected for the invoice (and in line with that country's vat legal requirements)

from the drop-down menu the VAT ID of Grupo Planeta that applies for this transaction

invoices always have the same retention percentage.

Otherwise, you must indicate the correct percentage or if it does not apply select "Not apply".

13. Withholding tax: The field will be informed by default if your

12. Buyer VAT ID: Choose

14 Lines

Type	Description	Qty	UOM	Price	
	Consultoría	0.00	Hours	10.00	0.00

PO Line: C690-1

Contract: Contrato test 3

Supplier part number:

Billing: 00890-62329-034029-No Aplica-No Aplica-No Aplica-No Aplica

Taxes

15 VAT Rate	VAT Amount	16 Tax Reference
<input type="text"/>	0.00	<input type="text"/>

17 Add Line Pick lines from Contract

Total Taxes

14. Lines: Complete the invoice line information. Here you can edit the quantity/price if you are sending a partial invoice for the selected Purchase Order. If you invoice a Purchase Order partially (only against selected purchase order lines), delete the lines that you do not invoice, NOT those with a value of 0.

VAT rates will be determined by your billing country

private lessons by natural persons on subjects included in the curricula of the educational system) Special regime of the cash criterion: Leave blank if it does not apply.

16. Tax reference: For transactions with exempt and zero rate, COUPA will require you to indicate a relevant reference or any indication for these articles to indicate why they are not subject to VAT (for example: Supplies of goods and services for promotional purposes, Teaching in authorized public or private centers and

17. Add line: You should not add a new line when you create an invoice based on a Purchase Order as it will cause a failure in the automatic conformation between the order

and the invoice, so your invoice is waiting

for reconciliation and delays payment.

[+ Add Line](#) [+ Pick lines from Contract](#)

18 Total Taxes

Lines Net Total	0.00
Lines VAT Totals	0
Total VAT	0.00
Net Total	0.00
Gross Total	0.00

[Delete](#) [Cancel](#) **20** [Save as draft](#) **19** [Calculate](#) **20** [Submit](#)

21  Comments [Mute Comments](#) 

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

[Attachments](#) [Add File](#) | [URL](#)

[Add Comment](#)

18. Totals and taxes: The total net summary

and total amount of VAT is shown

19. Calculate: After completing all the invoice information, click the "Calculate" button to determine the invoice total.

complete and correct, you can send it: Click on the "Submit" button to generate the legal invoice on your behalf. Before sending the invoice, a confirmation

message will appear.

20. You can save the invoice as Draft or, if it is already

21. Comments: In this section you can write comments/notes to communicate with the buyer.

Remember that acceptance of the conditions and terms of use at the time of registration with the CSP means that you accept that Coupa generates electronic invoices on behalf of your company and that electronic invoices in Coupa MUST be the exact reflection of the invoices that your company has in its accounting system.

3.8 Disputed invoices

Invoices with "Disputed" status are invoices with information with which Grupo Planeta does not agree, needs clarification or considers it incorrect.

When the status of an invoice changes to the "Disputed" status, you will receive a notification by email and also through the CSP with the invoice number, the date of the challenge, the reason for the challenge and, optionally, any additional comments.

Grupo Planeta can leave comments on the invoice while it is in a state of conflict.

Disputed invoices will not be processed for payment by Grupo Planeta until you have resolved the challenge. If an invoice has been sent with an error and is consequently contested, you must create a cancellation document (Credit Note) against this invoice, by clicking on the "Resolve" icon (this credit note must have the same "error" as the original invoice to cancel it completely.)

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Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer

Invoices

Instructions From Customer
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices ⓘ

Invoice #	Invoice Date	PO #	Gross Total	Disputed Date	Commented	Dispute reason	Comments	Actions
20211111_8	11/11/2021	C609	133.10 EUR	11/11/2021	None	Price different from PO/Contract or Catalog		
20211111_6	11/11/2021	C608	7,882.55 EUR	11/11/2021	None	Price different from PO/Contract or Catalog		
20211111_5	11/11/2021	C607	108.90 EUR	11/11/2021	None	Price different from PO/Contract or Catalog		
20211111_2	11/11/2021	C605	133.10 EUR	11/11/2021	None	Price different from PO/Contract or Catalog		
20211111_1	11/11/2021	C604	108.90 EUR	11/11/2021	None	Price different from PO/Contract or Catalog		
san1	07/10/2021	C254	12.10 EUR	07/10/2021	None	Price different from PO/Contract or Catalog		
III	20/09/2021	145	28.65 EUR	20/09/2021	None	Tax rate missing or incorrect		

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Then you must indicate if you want to adjust or cancel the invoice, click in the buttons at the end of the invoice screen:

Total Taxes

Lines Net Total		110.00
Lines VAT Totals	VAT 21%	23.10
Total VAT		23.10
Net Total		110.00
Gross Total		133.10

[Cancel Invoice](#) [Adjust](#)

- **Cancel:** If the invoice has been issued as a duplicate, or if you need to modify information unrelated to the price or quantity of the invoice, select "Cancel billing". Coupa will then direct you to the screen to create the credit note.

Create Credit Note Create

This credit note applies to invoice [202111111_8](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* Credit Note #

* Credit Note Date

Payment Term

* Currency

Delivery Number

Status

Original Invoice Number

Original Invoice Date

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

Cash Accounting Scheme

Credit Reason

Margin Scheme

From

* Supplier

* Supplier VAT ID

* Invoice-From Address

* Remit-To Address

* Ship-From Address

To

Customer

* Bill-To Address

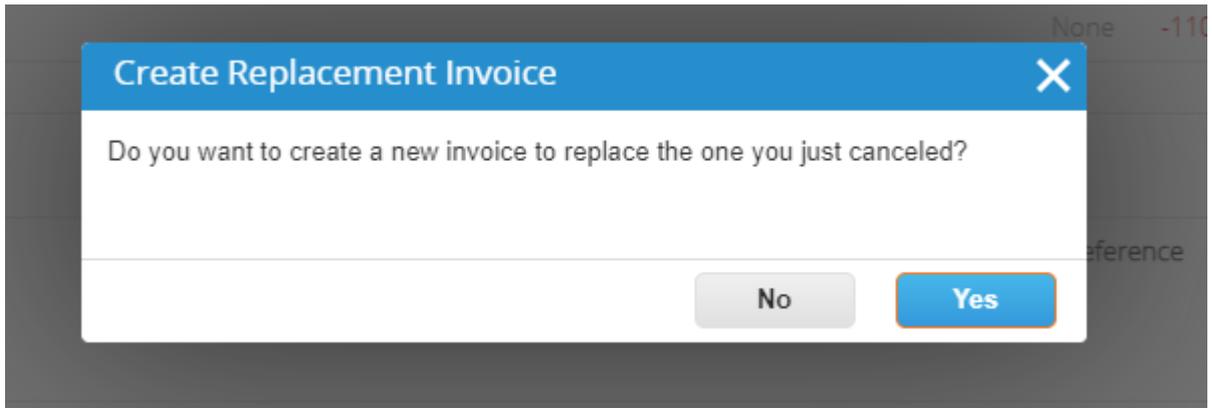
* Buyer VAT ID

Ship To Address

Withholding tax

Please, put the withholding tax applied

Once completed and sent, the following message will appear to create the replacement invoice:



- Adjust: If you need to correct the price and/or amount of the invoice, choose this option. Select quantity (if you want to reduce quantity), price (reduce unit price) or Other (if you reduce quantity and price):

Lines

Adjustment Type

Type	Description	Qty	UOM	Price	
	Contratación externa	-129.0	Unidades	50.50	-6,514.50 

PO Line
C608-1

Contract
Contrato test 3

Supplier part number

Billing
00880-62311-034833-No Aplica-No Aplica-No Aplica-No Aplica

Taxes

VAT Rate	VAT Amount	Tax Reference
21.0%	-1,368.05	

☰ Lines

Adjustment Type Price

Type	Description	Qty	UOM	Price	
	Contratación externa	129.000	Unidades	-50.50	-6,514.50

PO Line C608-1 Contract Contrato test 3 Supplier part number

Billing
00880-62311-034833-No Aplica-No Aplica-No Aplica-No Aplica

Taxes

VAT Rate	VAT Amount	Tax Reference
21.0%	-1,368.05	

☰ Lines

Adjustment Type Other

Type	Description	Qty	UOM	Price	
	Contratación externa	129.000	Unidades	-50.50	-6,514.50

PO Line C608-1 Contract Contrato test 3 Supplier part number

Billing
00880-62311-034833-No Aplica-No Aplica-No Aplica-No Aplica

Taxes

VAT Rate	VAT Amount	Tax Reference
21.0%	-1,368.05	

Generally speaking, invoices sent with the following types of errors will be contested by Grupo Planeta:

- Price differs from purchase order, contract or catalog
- Quantity other than that of the purchase order, contract or catalogue
- Duplicate invoice. Already paid or with payment review in progress
- Shipping defective or erroneous product or excessive shipping returned
- Currency other than purchase order/contract or catalog
- The tax rate is missing or incorrect

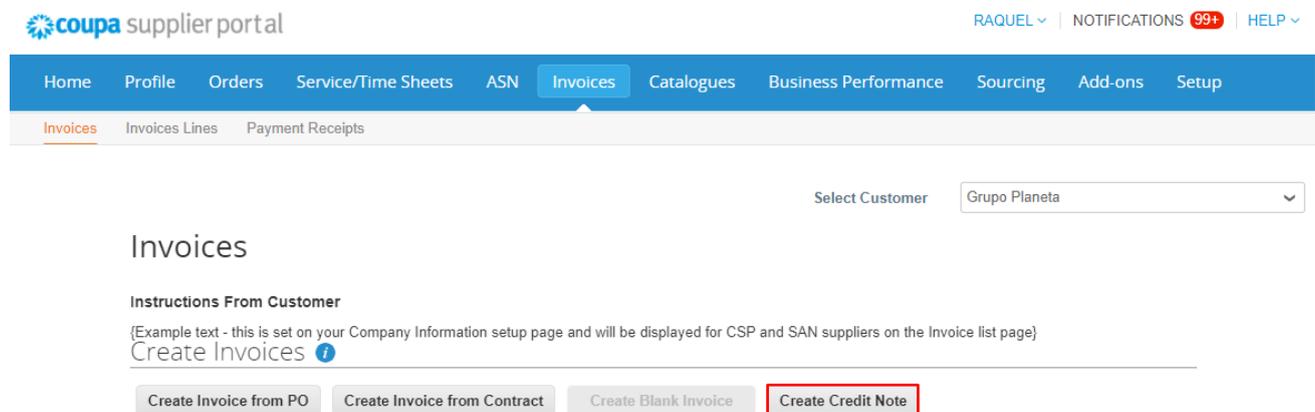
- Invoice date exceeds tolerated margin
- Incorrect payment terms
- Unit of measurement other than the purchase order
- Additional charges not previously accepted by Grupo Planeta

3.9 Credit Notes

Credit notes are used to resolve a dispute over an invoice, correct an invoice or cancel a duplicate invoice, return/cancellation of items...

To create a credit note:

1. Click the Create Credit Note button on the "Invoices" tab



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Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

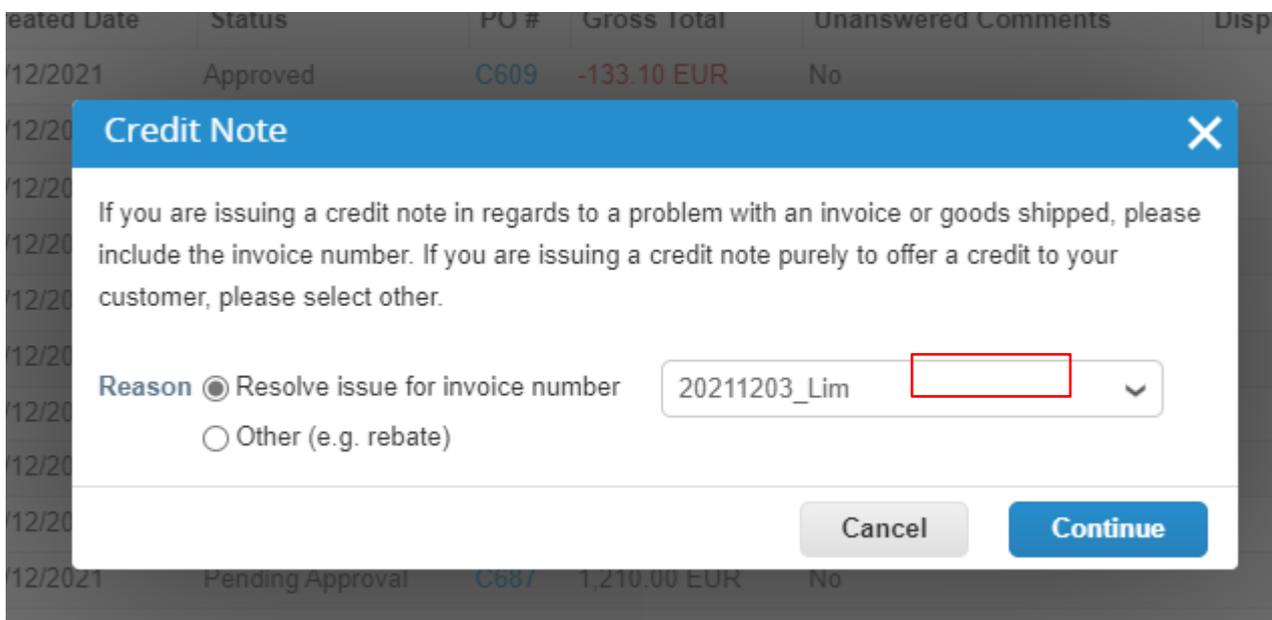
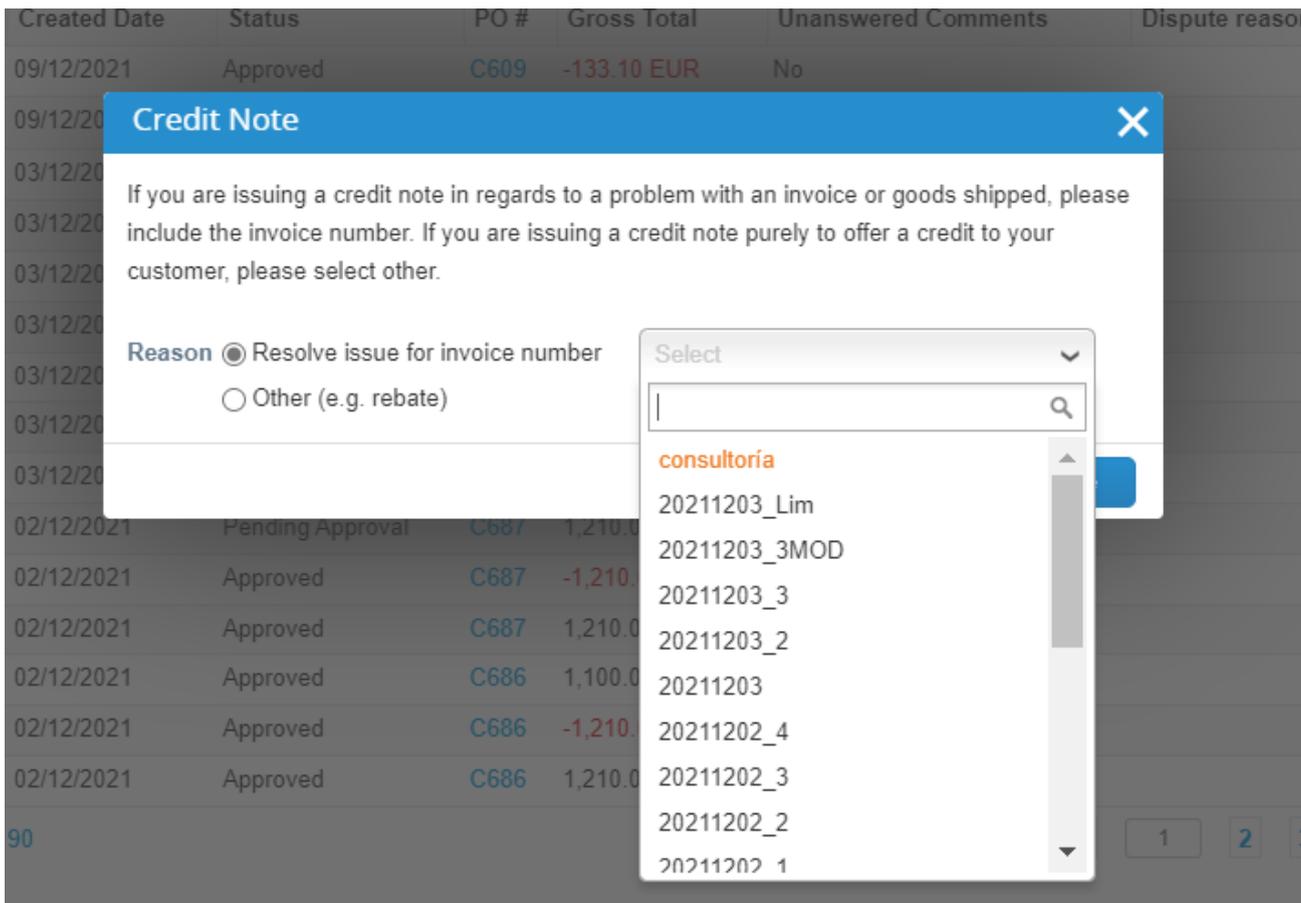
Select Customer

Invoices

Instructions From Customer
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices ⓘ

Then you must select the invoice on which you want to make the credit note and click on "Continue":



As in point 3.8, you must indicate if you want to cancel or adjust the invoice:

Create Credit Note Create

This credit note applies to invoice [20211203_Lim](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

- 1 * Credit Note #
- 2 * Credit Note Date
- 3 Payment Term
- 4 * Currency
- 5 Delivery Number
- 6 Status
- 7 Original Invoice Number
- 8 Original Invoice Date
- 9 Supplier Note
- 10 Attachments Add [File](#) | [URL](#) | [Text](#)
- 11 Cash Accounting Scheme
- 12 Credit Reason
- 13 Margin Scheme

From

- * Supplier
- 14 * Supplier VAT ID
- * Invoice-From Address
- * Remit-To Address
- * Ship-From Address

To

- Customer
- * Bill-To Address
- 15 * Buyer VAT ID
- Ship To Address
- 16 Withholding tax

Please, put the withholding tax applied

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> 1. Credit Note #: Add the credit note number generated in your ERP system 2. Credit note date: Date of creation of the credit note 3. Payment term: Payment term agreed with Grupo Planeta 4. Currency: Insert the currency set in the order | <ul style="list-style-type: none"> 5. Delivery number: Provides the delivery number if applicable 6. Status: Displays the status of the credit note 7. Original invoice number: You will be informed by previously indicating the invoice on which the credit note is applied 8. Original invoice date: You | <ul style="list-style-type: none"> will be informed by previously indicating the invoice on which the credit note is applied 9. Supplier note: Insert comments for Grupo Planeta 10. Attachments: Add any document relevant to the invoice 11. Cash accounting scheme: Blocked field 12. Credit reason: Brief detail |
|---|---|---|

- about the creation of the credit note
- 13. Margin scheme: Blocked field
- 14. Supplier VAT ID: Blocked field
- 15. Buyer VAT ID: Blocked field
- 16. Withholding tax: The field will be informed by default if your invoices always have the same retention percentage. Otherwise, you must indicate the correct percentage or if it does not apply select "Not apply".

 Lines

17 Adjustment Type

Type	Description	18 Qty	UOM	18 Price	
	Servicio de limpieza	-20.00	Hours	15.00	-300.00

PO Line
C689-1

Contract

Supplier part number

Billing
00890-62953-034033-No Aplica-No Aplica-No Aplica-No Aplica

Taxes

19 VAT Rate	VAT Amount	Tax Reference
<input type="text" value="21.0%"/>	-63.00	<input type="text"/>

- 17. Adjustment Type: Select the type of adjustment (Quantity, Price, or Other) in the case that you choose "adjust invoice" . You can edit both quantity and order by choosing Other. For invoices of amount, the only option available is the price. In the event that you choose to cancel the invoice, you will not be able to modify neither price nor quantity.
- 18. Price/Quantity: Insert a negative price on the line that is based on the amount with the "price" field to complete. Modify the quantity if you select the "Quantity" setting.
- 19. VAT rate: You can add any type of tax by choosing the correct VAT rate for each line. The VAT rate would be the same as that applied on the original invoice

Total Taxes

Lines Net Total	-300.00
Lines VAT Totals	-63.00
Total VAT	-63.00
Net Total	-300.00
Gross Total	-363.00

Delete
Cancel
Save as draft
20 Calculate
21 Submit

0 Comments Mute Comments ▾

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add [File](#) | [URL](#)

Add Comment

20. Calculate: After completing all the information on the credit note, click the "Calculate" button to

have the taxes added up and calculated correctly and determine the total.

21. Submit: Click "send" when the Credit Note is ready.

You can save the credit note as a Draft or, if it is already complete and correct, you can send it: Click on the "Send" button to generate the legal credit note on your behalf.

3.10 Guide to Choosing the Right VAT IDs

- If you are charging VAT (including VAT at a reduced or zero rate):
 1. Your VAT ID must match the country where VAT is charged (for example, if you have imported products into Spain and will charge VAT to Spain, enter your VAT ID from Spain).
 2. If there is a Grupo Planeta tax identification number in the country where VAT is charged or to which the products are shipped, use that tax identification number.
- If you do not charge VAT:
 1. If goods are supplied, your VAT ID (if applicable) must match the country from which the goods are shipped.
 2. For goods, select Grupo Planeta's tax identification number for the country where the goods will be shipped.

3. If services are provided, your VAT identification country will normally match the country where the establishment providing the services is located.

3.11 Guide on choosing the right VAT rates

See the instructions below to apply the correct VAT rates:

- Make sure the correct VAT is charged on the invoice. The VAT rates that are available to choose from in the CSP when you create invoices are controlled by your billing country.
- Make sure there is only one applicable VAT rate per buyer's line item, for example, 21% or 10%. When you're supplying items where different VAT rates apply to the same line item, divide them into multiple invoices.
- If a shipping charge and/or handling fee has been agreed and is not included in the price of your products, enter this on the invoice and put the corresponding VAT. The VAT rate for shipping costs must be the same as that applied to the goods that are supplied on the invoice.
- Please note that there are 3 different "zero" tax treatments in COUPA and each has different meanings. See below for compliance requirements for them in the invoices:
 1. Zero-rate transactions: These are transactions that are subject to VAT, but the VAT rate is 0%. Please note that COUPA will ask you to add a "relevant reference or any indication" to show why these products have a zero rate (e.g. zero VAT rate: international freight).
 2. Exempt transactions: These are transactions that are exempt from VAT. Please note that COUPA will ask you to add a "relevant reference or any indication" to demonstrate why these products are exempt (e.g. VAT exempt: insurance).
 3. Investment of the taxable person: These are transactions in which Grupo Planeta is subject to the self-assessment of any tax due.

3.12 Final Invoice Considerations

Grupo Planeta requires that there be no discrepancy in terms of currency, unit of measure, unit price, quantity and additional charges, between the invoice and the purchase order despite all being editable fields during the creation of the invoice.

Invoices submitted through the Coupa Supplier Portal (CSP) must fully represent and conform to the invoices registered in your company's accounting system

After completing all the fields included in the invoice model specific to your country and sending it to Grupo Planeta, Coupa will automatically generate an invoice with legal validity on behalf of your company. Therefore, no paper/PDF version of the invoice must be sent by

post or email to Grupo Planeta. Nor do you have to attach a PDF invoice to the legally valid invoice in Coupa. If you do, Grupo Planeta will ignore it.

The currency of the invoice must be the same as that of the corresponding purchase order.

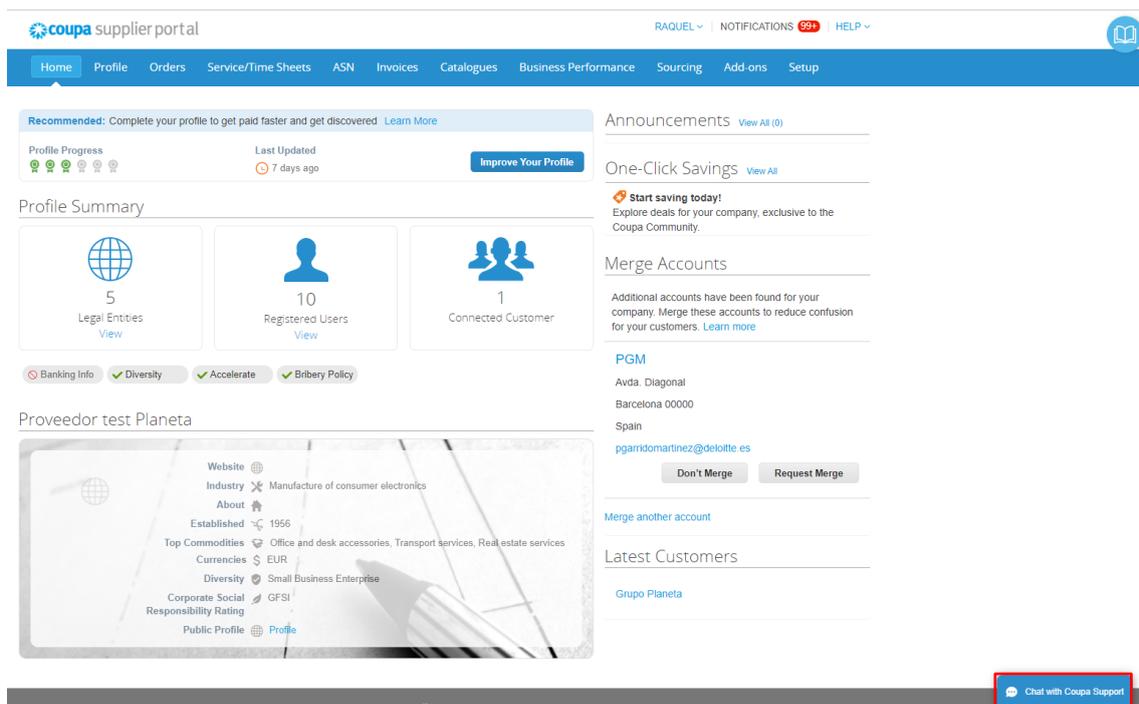
The units of measurement applied in the purchase order must not be modified on the invoice.

If you need to partially invoice a particular purchase order, you will need to delete all line(s) of the purchase order that do not need to be invoiced. Never send invoice lines with an amount equal to zero in it.

Grupo Planeta will only accept invoices that refer to a purchase order in Coupa

4. Additional support

If you've logged in the CSP as if not, you can chat with Coupa support to get a quick answer or resolution for your case by clicking on the bottom right corner of the screen.



Please note: If there is no support agent available, you also have to provide the subject of your application and a detailed description of the problem, after of which you can see a confirmation that your case was submitted and registered. A support agent will contact you

Note: This is not a chat option to communicate with Grupo Planeta. If you have any additional questions or doubts about the content of this support manual, you can contact us at: suppliers@planeta.es

as soon as it is available.

5. Appendices

List of COUPA compliant e-invoicing countries

Country	Added in the Release	Feedback
Germany	R16	
Australia	R17	
Austria	R16	
Bahrain	R24	No support for digital signatures and archiving
Bangladesh	R28	Checks on the content of invoices; COUPA does not create the legal invoice on behalf of the supplier; There is no support for digital signatures and archiving. See Validation-only invoice templates for more information
Belgium	R17	
Bulgaria	R18	
Canada	R18	
China	R27	Checks on the content of invoices; COUPA does not create the legal invoice on behalf of the supplier; There is no support for digital signatures and archiving. See Validation-only invoice templates for more information.
South Korea	R29	Checks on the content of invoices; COUPA does not create the legal invoice on behalf of the supplier; There is no support for

		digital signatures and archiving. See Validation-only invoice templates for more information.
Croatia	R18	
Denmark	R18	
USA. USA	R16	
United Arab Emirates	R24	
Slovakia	R17	
Slovenia	R18	
Spain	R17	Since R21.3 The Canary Islands have been added to Spain. See Compliance of Spain and Canary Islands.
Estonia	R18	
Finland	R18	
France	R16	
Greece	R18	
Hong Kong	R25	
Hungary	R29	Checks on the content of invoices; COUPA does not create the legal invoice on behalf of the supplier; There is no support for digital signatures and archiving. See Validation-only invoice templates for more information.
India	R18	
Ireland	R16	
Italy	R16 R22 R23	As of January 1, 2019, the Italian government implemented an invoice settlement regime that requires all Italian domestic invoices to be sent through its SDI (Sistema Di Intercambio). Please refer to the Italian e-invoicing model with SDI authorization for more details. R16 (post-audit model), R22 (outflow for SDI

		authorization model), R23 (input flow for SDI authorization model)
Japan	R19	
Latvia	R18	
Lithuania	R18	
Luxembourg	R19	
Malaysia	R19	
Malta	R18	
Mexico	R20	Settlement country model
Montenegro	R24	
Myanmar	R28	Checks on the content of invoices; COUPA does not create the legal invoice on behalf of the supplier; There is no support for digital signatures and archiving. See Validation-only invoice templates for more information
Namibia	R29	No support for digital signatures and archiving
Norway	R18	
New Zealand	R19	
Netherlands	R16	
Pakistan	R28	Checks on the content of invoices; COUPA does not create the legal signatures or the file. See Validation-only invoice templates for more information.
Poland	R17	Correction invoices are not accepted
United Kingdom	R16	
Czech Republic	R17	Correction invoices are not accepted

Romania	R19	
Serbia	R19	No support for digital signatures and archiving
Singapore	R17	
South Africa	R16	
Sweden	R16	
Switzerland	R16	