INVOICING HSBC VIA COUPA SUPPLIER PORTAL

Supplier Guidance Document

Version 2.0

HSBC

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BELGIUM SUPPLIERS ONLY – GETTING READY TO SUBMIT INVOICES VIA COUPA SUPPLIER PORTAL

From **1 January 2026**, Coupa will **send a copy of an invoice to Peppol via Sovos**, once you have clicked **Submit.** To ensure this is actioned, **please complete the following steps BEFORE you submit an invoice via Coupa Supplier Portal:**

1. Set up Multifactor Authentication (MFA)

Multifactor authentication (MFA) is the preferred security option to protect accounts. First you need to Enable MFA in your Account Settings.

- ❑ Go to the **Account Settings** page.
  You can reach this page by selecting your profile name on the top-right corner of the window, and selecting the **Account Settings** option.
- ❑ Select the **Security & Multi Factor Authentication** tab on the left navigation bar.
- ❑ Set your preferred default MFA method by selecting the radio button under their descriptions.

- ❑ Select the MFA method depending on how you want to receive the verification codes:
  - **Option 1: Using an Authenticator App** (available from the app store) on your mobile phone to generate a code. **This is the recommended option.**
  - **Option 2: Using SMS** to receive a code sent by text message to your phone number.
  - **Option 3: Using email** to receive a code.

When you enable MFA, you get an email notification of the change.

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2. **Enable MFA via authenticator app**

Enabling MFA via an authenticator app is the recommended option. The first time you visit the **Security & Multi Factor Authentication** page, the system displays a window with instructions to configure this option. Follow the instructions on the window to configure MFA using an authenticator app:

- ❑ Visit the the Google Play store or the Apple app store.
- ❑ Search for an authenticator app.
  The recommended option is to use Google Authenticator, which is available for iOS and Android devices. See Install Google Authenticator for help with installing the app on your mobile device.
- ❑ Download and install your preferred authenticator app.
- ❑ Open the app on your mobile device.
- ❑ Go to the **Account Settings** page.
- ❑ Select the **Security & Multi Factor Authentication** tab on the left navigation bar.

- ❑ Scan the QR code shown in the modal with the authenticator app or copy the security key to use it as the CSP authentication code.
  For most apps, select "Add" or "+" to scan the QR code.
- ❑ Enter the 6-digit verification code from your device in the input field on the modal.
  The code that Google Authenticator provides is good only for 30 seconds. If you don't type that code on the CSP sign-in page and click **Log In** within 30 seconds, you have to get a new code and try again.
- ❑ Select the **Enable** button at the bottom right of the modal.
- ❑ Print your backup codes or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

Do not uninstall the authenticator app once the MFA set up is done: you will need the same app in future each time you encounter the MFA popup (for example when logging in or making some changes in the platform).

Guidance on how to set up MFA via Text or Email

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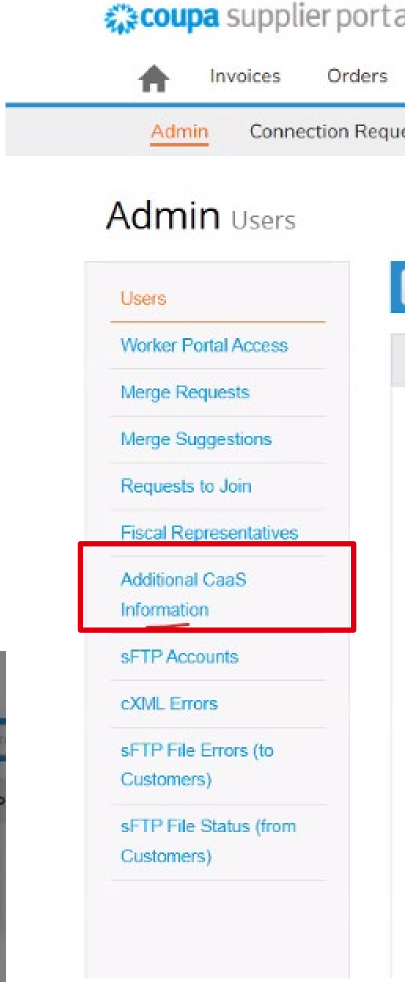
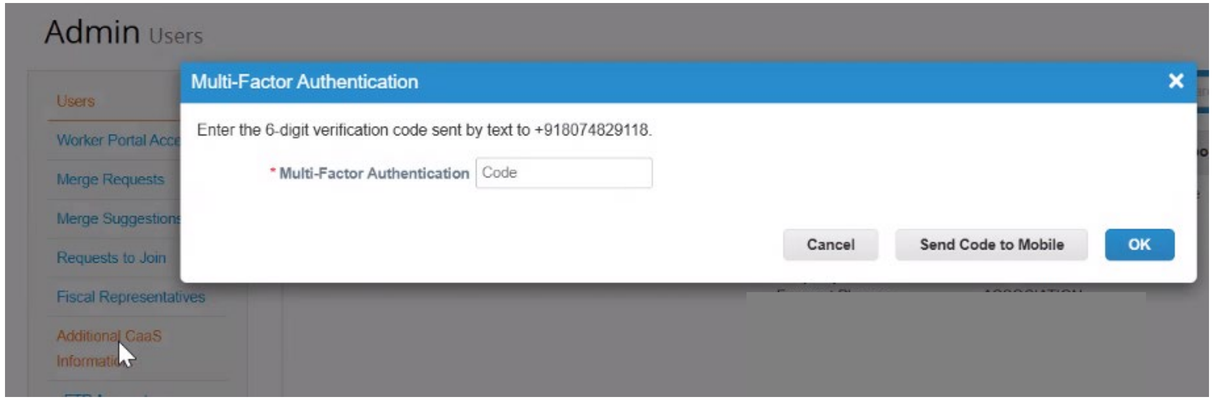


2. **Add Additional CaaS information to your CSP Account**

As an Admin/Account Owner in Coupa Supplier Portal, log into CSP and click on **Admin** sub-heading.

Next click on **Additional CaaS Information** from the left-hand list. You will be asked to **enter the MFA code from the app and click on OK.**



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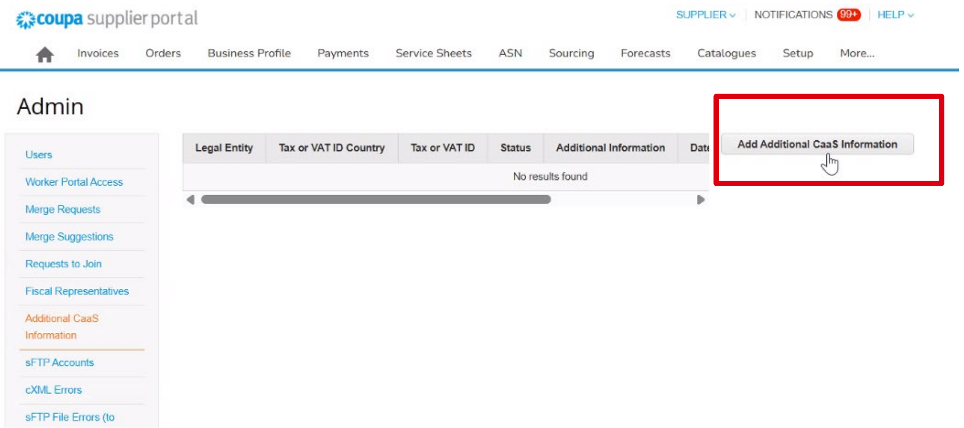
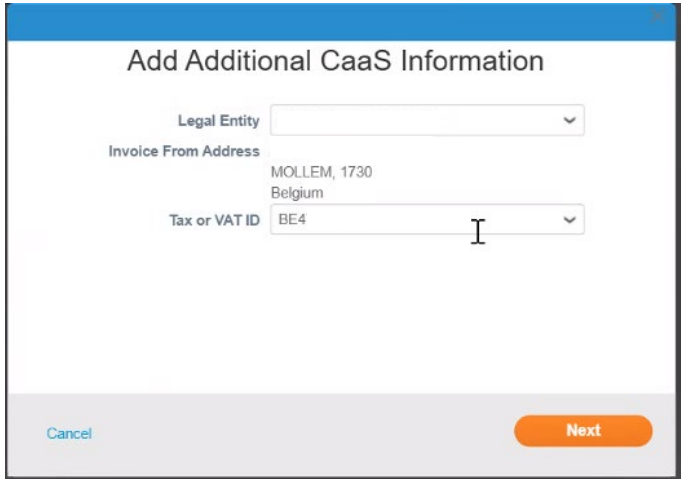
2. **Add Additional CaaS information to your CSP Account**

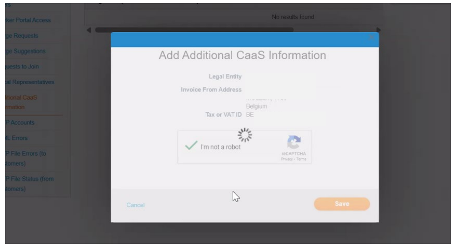
Click on **Add Additional CaaS information**



Select the **Legal Entity, Invoice from Address and VAT ID** if not already auto filled or check details if already filled from your entity details already entered into the CSP.

Click on **Next**





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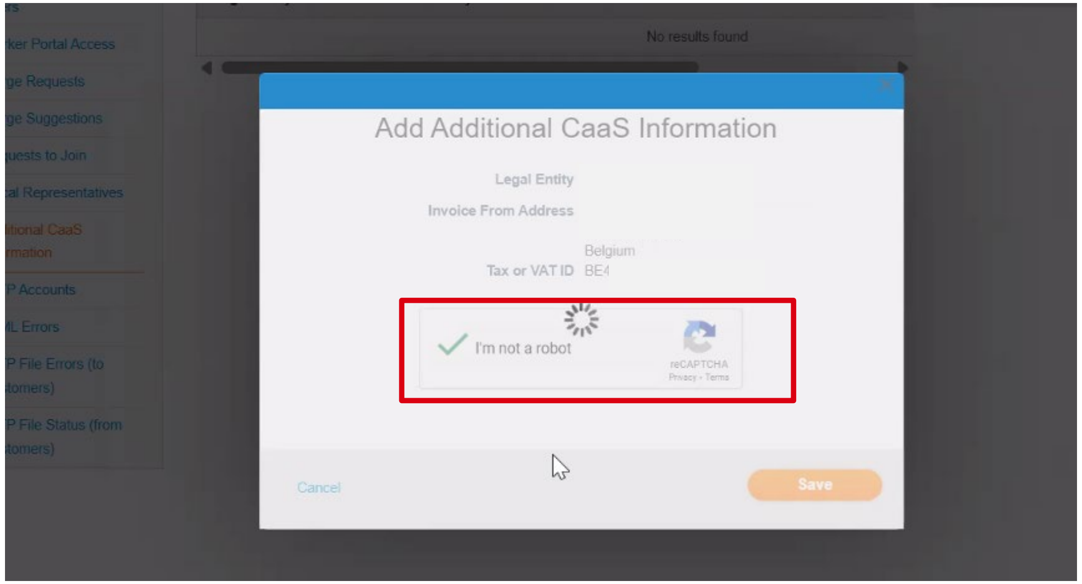
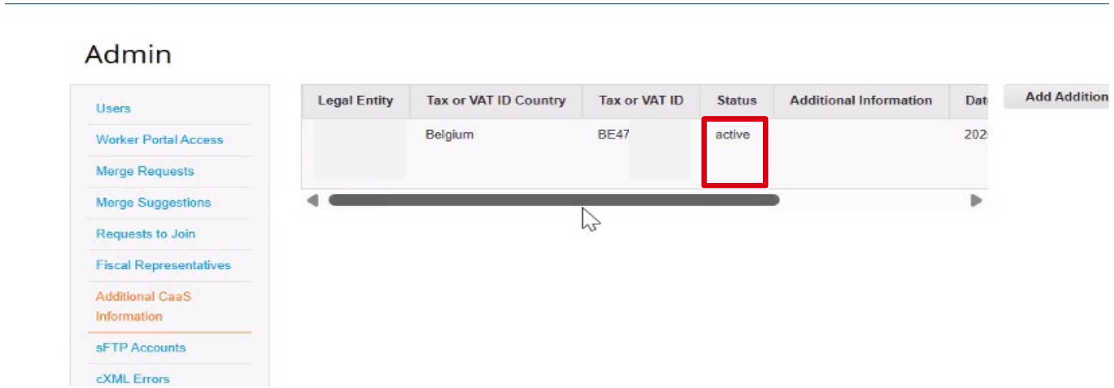
2. **Add Additional CaaS information to your CSP Account**

Click **I'm not a robot** box. This is additional security.



3. **CaaS information will now be Active in your CSP Account**

Status will update to Active. You can now submit invoices via CSP. Clicking Submit will send a copy of the invoice to Peppol via Sovos. You do not need to send to Peppol separately.



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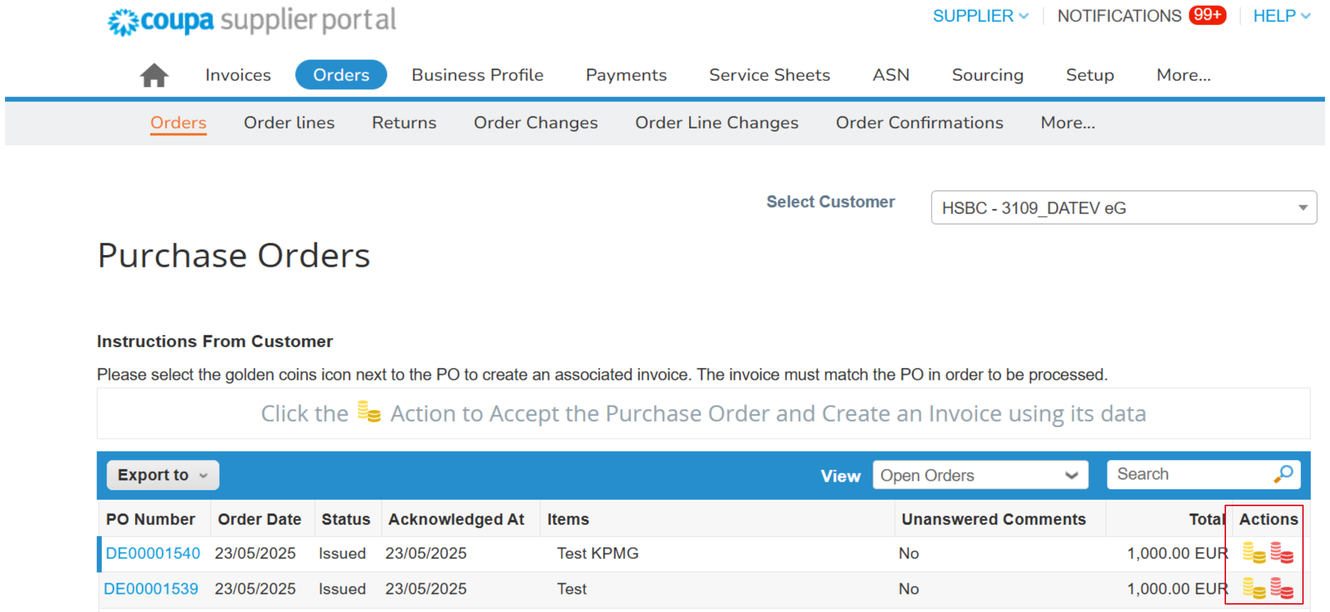
Create an invoice from a PO

1. Go to the **Orders** page, search for the Purchase Order you want to submit an invoice for and then select the 'Golden coins' icon under **Actions.**



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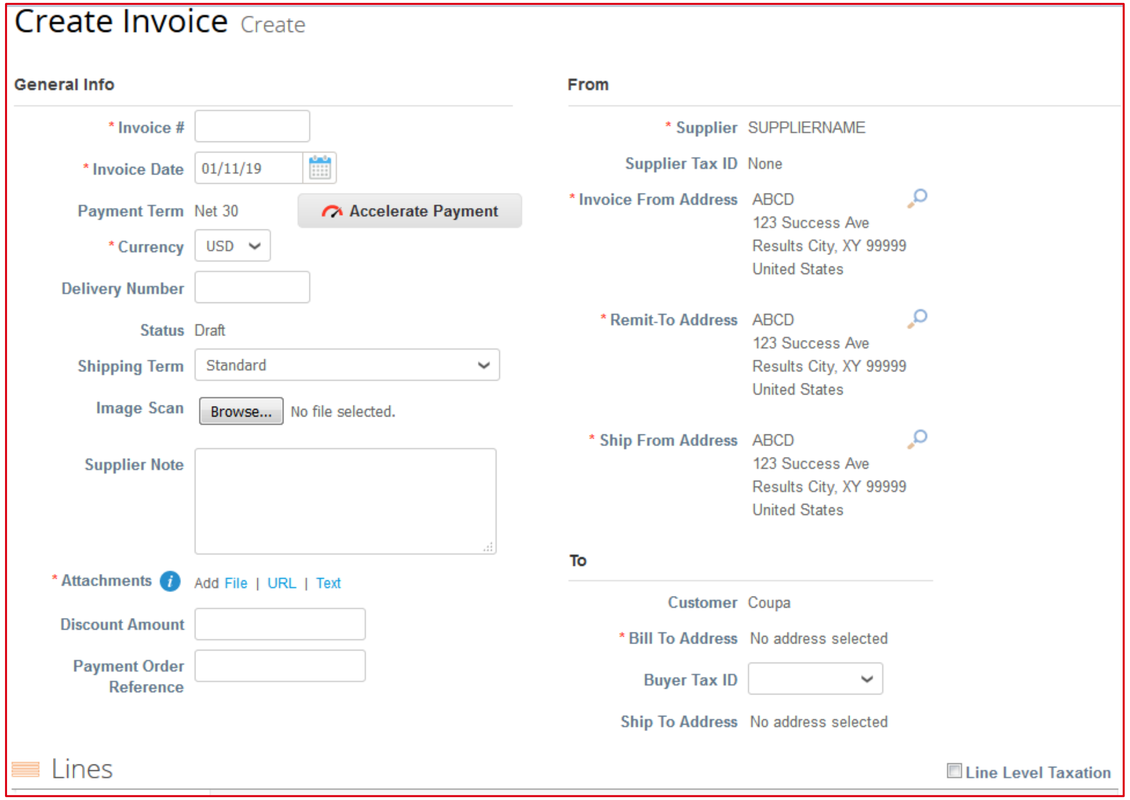
Complete at least the mandatory fields (marked with a red asterisk). You can create or choose an invoice from, a remit-to, and/or a ship from address by selecting the corresponding **Search** (magnifying glass) icon in the **From** section. For a PO backed invoice, the **Bill- To Address** will be auto-populated from the PO.

You can also attach files to an invoice using **Image Scan**. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.



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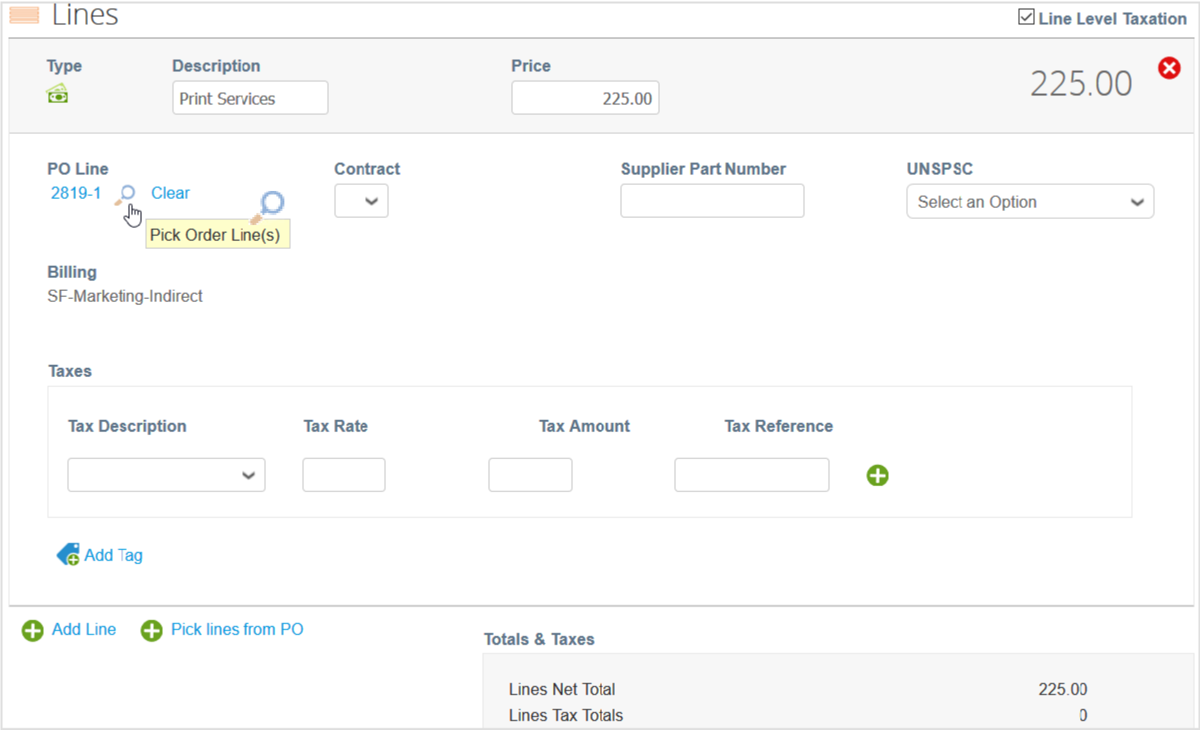
The CSP Profile page has a new Tax Registration section. Provide your Primary Country/Region for your tax ID, and then add your Tax ID.

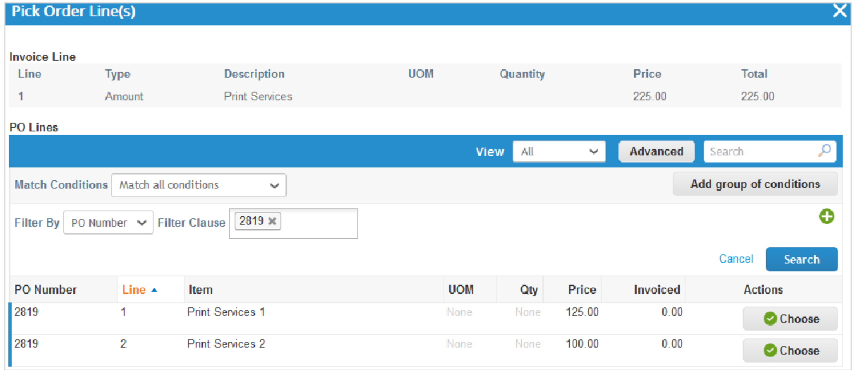
Please note VAT ID should be entered as BE + 10 digits including any leading 0s.
Example: BE0708865310

If you create an invoice from a PO and your customer allows you to pick lines from POs (enabling you to reference multiple POs on one invoice) and update/correct PO references on invoice lines, you can **Clear** PO lines and select PO lines from invoices by clicking on the **Pick Order Line(s)** magnifying glass icon.

In the appearing **Pick Order Line(s)** popup, **Choose** the PO line that you want to be mapped to your invoice line.



You can also add PO lines from other open orders by selecting the Pick Lines from PO link or the Add Icon next to it. In the appearing Pick Lines to Add popup, select the Add icon in the action column for the order line you want to add



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In the **Subtotal** section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

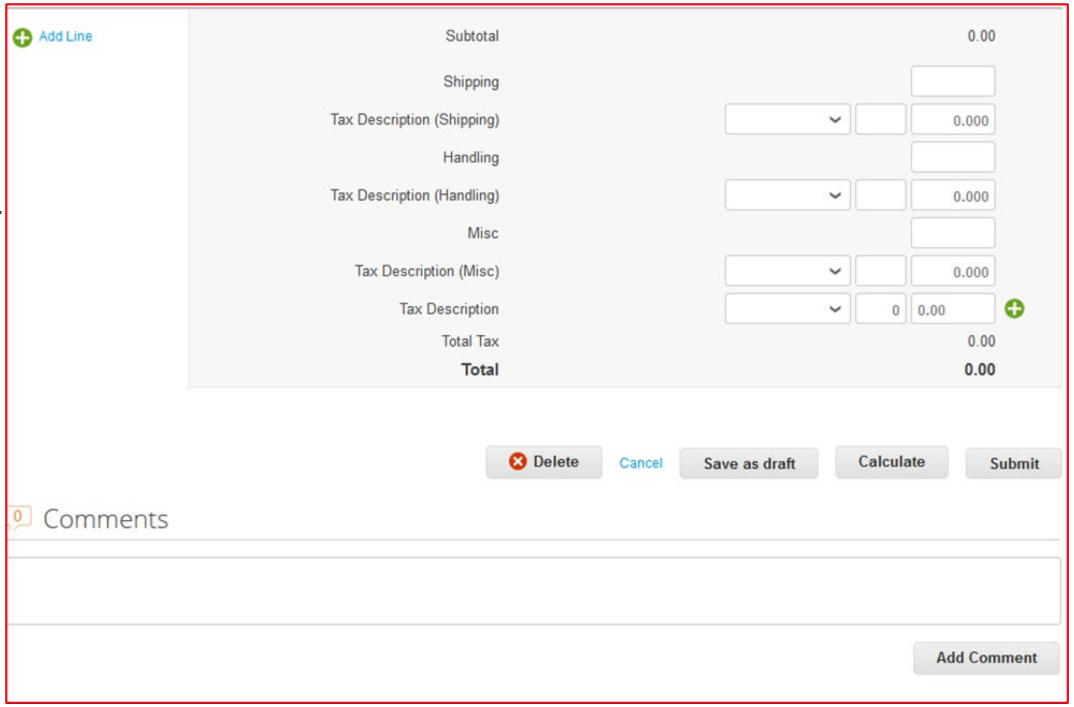
Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.

Selecting **Calculate** will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the **Add Line** link or the **Add** icon next to it, provided that your Coupa customer allows their suppliers to add lines.

Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.

Once you are ready, click **Submit.**



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Please note clicking Submit will send a copy of the invoice to Peppol via Sovos. You do not need to send to Peppol separately.

Invoices must be created one by one; no bulk creation is possible.

Edit an invoice

If you create or edit a PO-backed invoice, some of the fields are pre-populated with information from the original invoice or the PO.

You are required to accept the PO and the following restrictions will apply to the corresponding invoice:

- **Currency** – Cannot be changed from PO currency.
- **Unit Of Measure** – Cannot be changed from PO line UOM.
- **Price** – Cannot be changed from PO line unit price.
- **Quantity** – Can be changed from 0 to the remaining quantity on the PO line.
- **Amount** – Can be changed from 0 to the remaining amount on the PO line.

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Create a blank invoice

1. Select the **Create Blank Invoice** button above the **Invoices** table on the **Invoices** page.
2. Create a new or choose an existing invoice-from address.
3. On the **Create Invoice** page, complete at least the mandatory fields (marked with a red asterisk) in your invoice.
4. For Blank (Non-PO) invoices, select the **Bill-To address** (this is the HSBC entity you are invoicing)
5. Add the **Requester Email** and **Requester Name**

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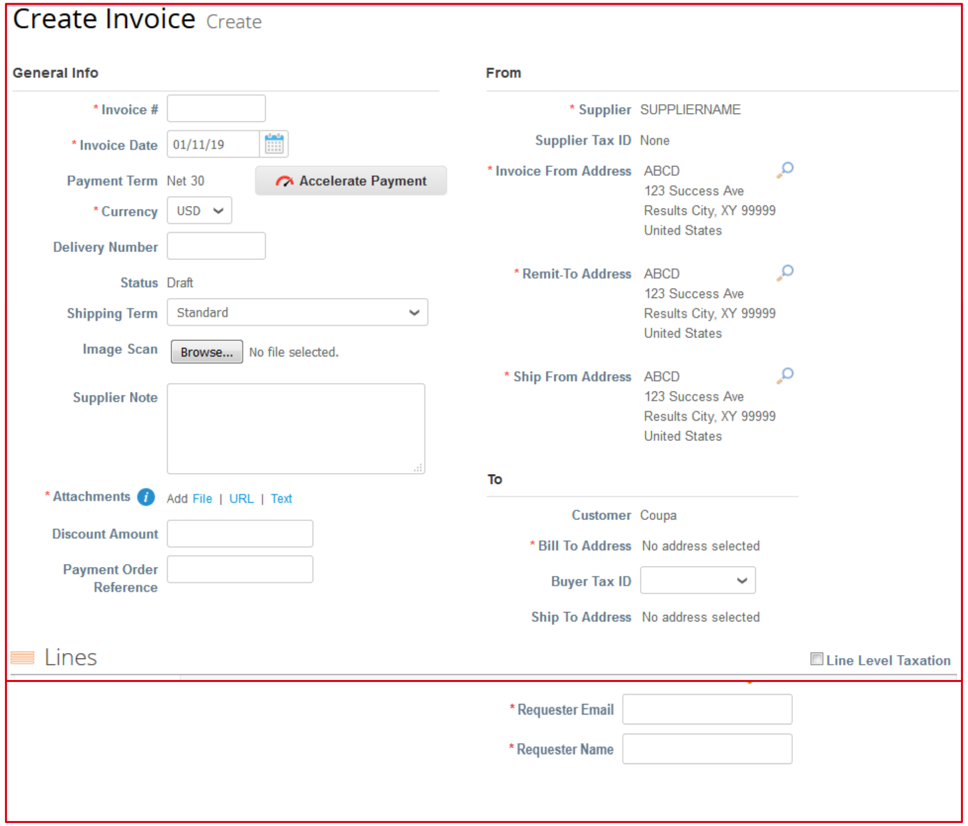

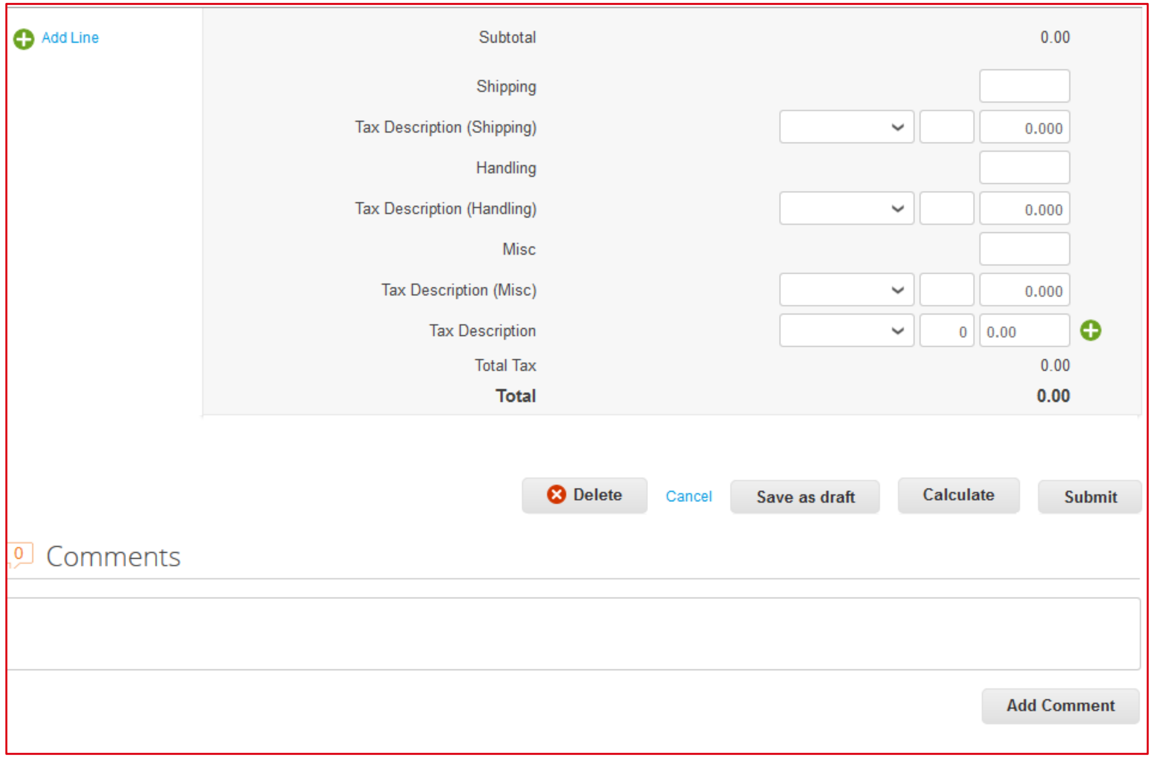

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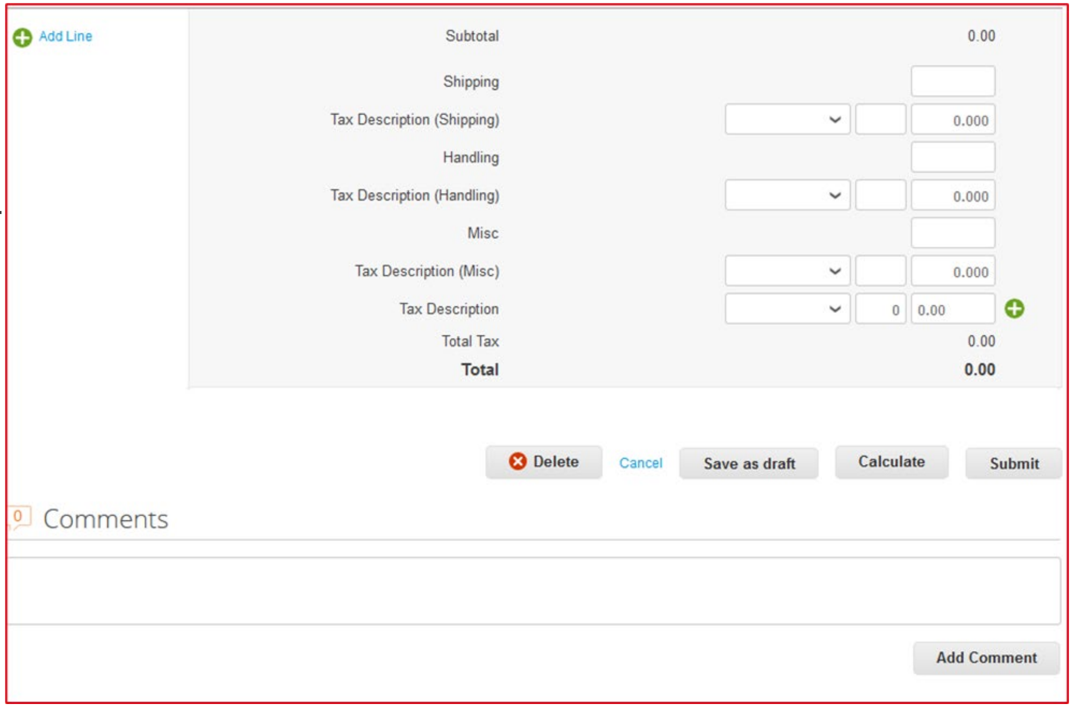

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