



# **INVOICING HSBC VIA COUPA SUPPLIER PORTAL**

## Supplier Guidance Document

Version 2.0

## **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.

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

### **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).

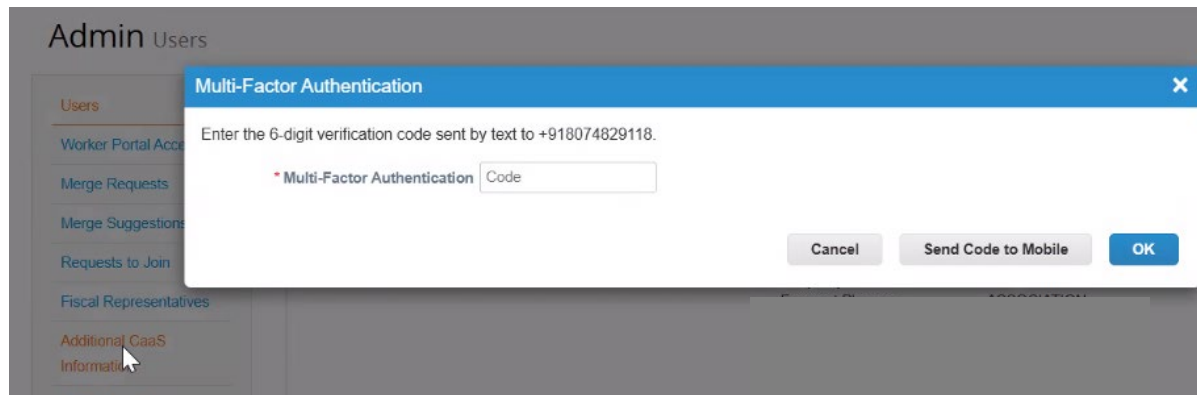
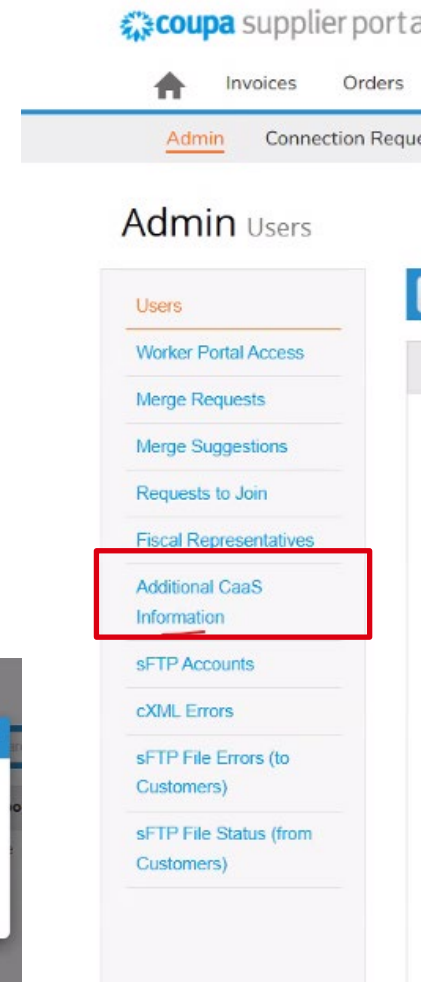


## BELGIUM SUPPLIERS ONLY – GETTING READY TO SUBMIT INVOICES VIA COUPA SUPPLIER PORTAL

### 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.

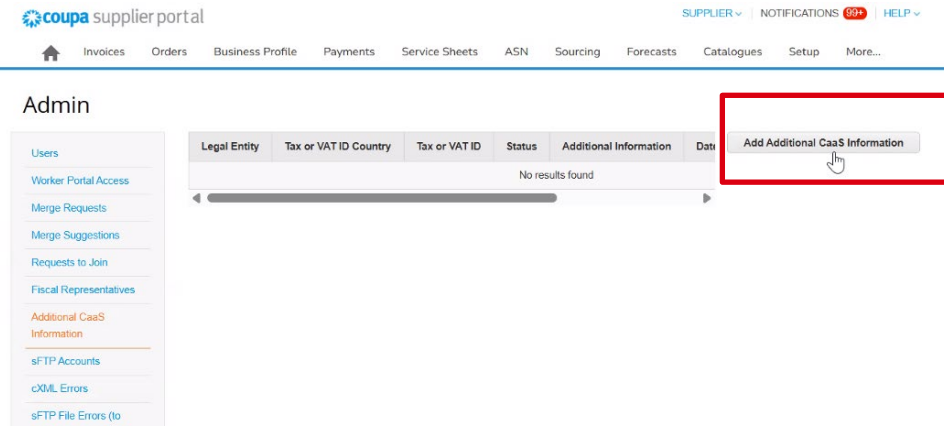
Next click on **Additional CaaS Information** from the left-hand list. You will be asked to enter the MFA code from the app and click on **OK**.



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

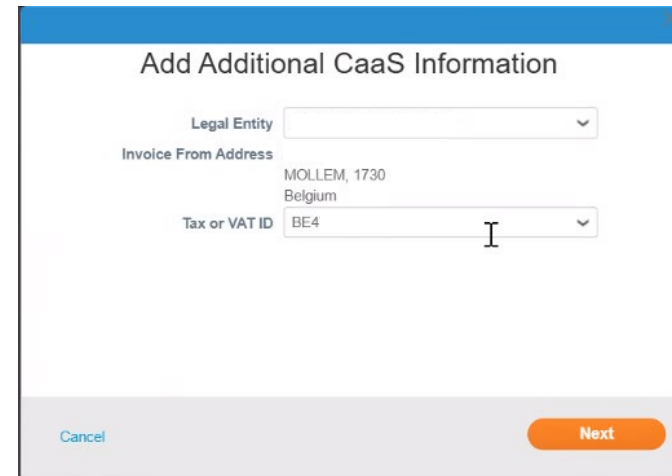
### 2. Add Additional CaaS information to your CSP Account

Click on **Add Additional CaaS information**

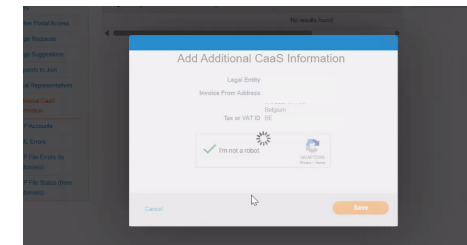


Select the **Legal Entity**, **Invoice from Address** and **VAT ID** if not already auto filled or check details if already filled from your entity details already entered into the CSP.

Click on **Next**



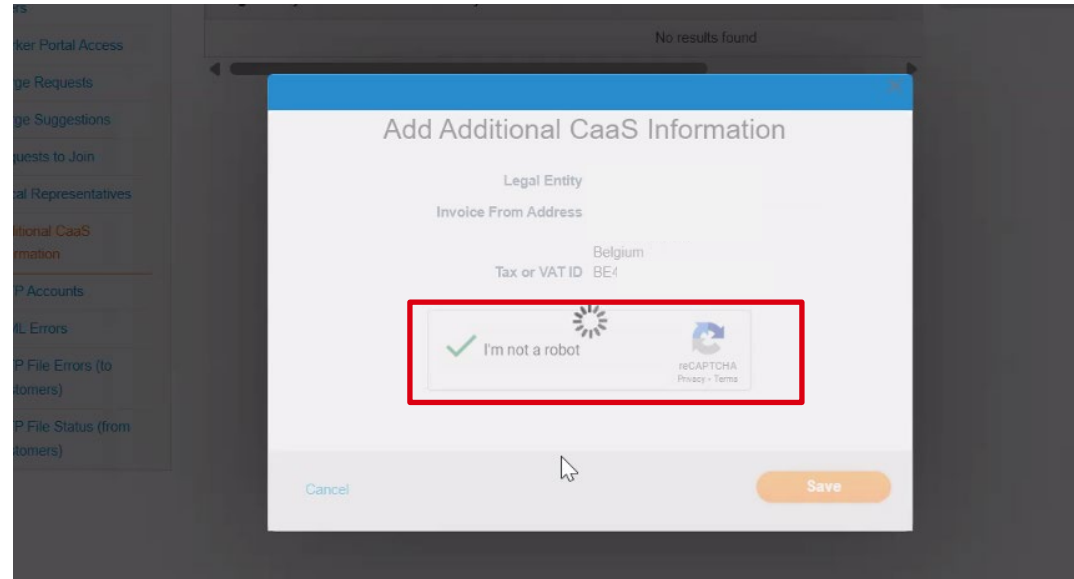
The screenshot shows the 'Add Additional CaaS Information' form. It has three main sections: 'Legal Entity' with a dropdown menu, 'Invoice From Address' with a text field containing 'MOLLEM, 1730 Belgium', and 'Tax or VAT ID' with a dropdown menu showing 'BE4'. At the bottom right, there is an orange 'Next' button. A cursor is visible over the 'Next' button.



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

### 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.



#### Admin


Legal Entity	Tax or VAT ID Country	Tax or VAT ID	Status	Additional Information	Date	Add Addition
Belgium	BE47		active		202	

# Create an invoice from a PO

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


 supplier portal

SUPPLIER  | NOTIFICATIONS 99+ | HELP 

 Invoices **Orders** Business Profile Payments Service Sheets ASN Sourcing Setup More...

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations More...


Select Customer 


HSBC - 3109\_DATEV eG 

Purchase Orders


Instructions From Customer


Please select the golden coins icon next to the PO to create an associated invoice. The invoice must match the PO in order to be processed.





Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to 

View 

Open Orders 

 Search 

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
<a href="#">DE00001540</a>	23/05/2025	Issued	23/05/2025	Test KPMG	No	1,000.00 EUR	 
<a href="#">DE00001539</a>	23/05/2025	Issued	23/05/2025	Test	No	1,000.00 EUR	 

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.

## BELGIUM SUPPLIERS ONLY



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**

Create Invoice

Create

General Info

\* Invoice #

\* Invoice Date

01/11/19

Payment Term

Net 30

Accelerate Payment

\* Currency

USD

Delivery Number

Status

Draft

Shipping Term

Standard

Image Scan

Browse...

No file selected.

Supplier Note

\* Attachments

Add File | URL | Text

Discount Amount

Payment Order Reference

From

\* Supplier

SUPPLIERNAME

Supplier Tax ID

None

\* Invoice From Address

ABCD

123 Success Ave

Results City, XY 99999

United States

\* Remit-To Address

ABCD

123 Success Ave

Results City, XY 99999

United States

\* Ship From Address

ABCD

123 Success Ave

Results City, XY 99999

United States

To

Customer

Coupa

\* Bill To Address

No address selected

Buyer Tax ID

Ship To Address

No address selected

Lines


Line Level Taxation





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

Lines

Type

Description

Print Services

Price

225.00

225.00

PO Line

2819-1

Clear

Pick Order Line(s)

Contract

Supplier Part Number

UNSPSC

Select an Option

Billing

SF-Marketing-Indirect

Taxes

Tax Description

Tax Rate

Tax Amount

Tax Reference

Add Tag

Add Line

Pick lines from PO

Totals & Taxes

Lines Net Total

225.00

Lines Tax Totals

0

Pick Order Line(s)

Invoice Line

Line

Type

Description

UOM

Quantity

Price

Total

1

Amount

Print Services

225.00

225.00

PO Lines

View

All

Advanced

Search

Match Conditions

Match all conditions

Add group of conditions

Filter By

PO Number

Filter Clause

2819

Cancel

Search

PO Number

Line

Item

UOM

Qty

Price

Invoiced

Actions

2819

1

Print Services 1

None

None

125.00

0.00

Choose

2819

2

Print Services 2

None

None

100.00


0.00

Choose

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.

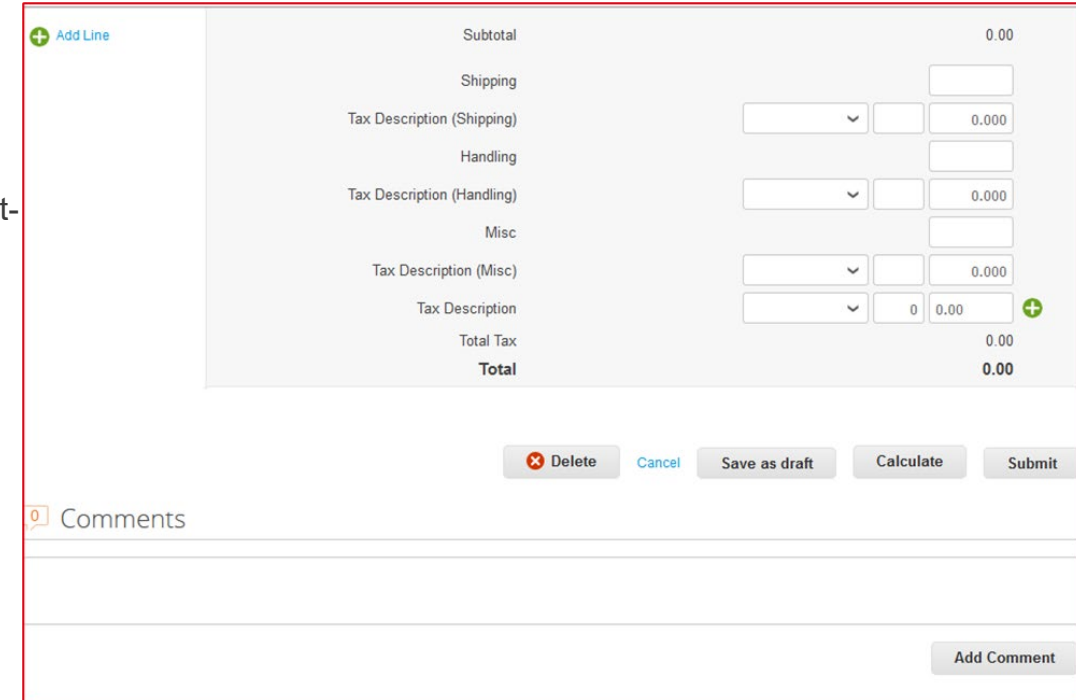
You can add invoice lines to your invoice by clicking on the **Add Line** link  or the **Add** icon next to it, provided that your Coupa customer allows their suppliers to add lines.

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

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



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



The screenshot shows the 'Subtotal' section of an invoice form. It includes fields for Shipping, Handling, and Misc costs, each with a dropdown for 'Tax Description' and a numeric input for the amount. The 'Total Tax' field is set to 0.00. A green plus icon is next to the 'Total Tax' field. Below the form are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. At the bottom, there is a 'Comments' section with a text area and an 'Add Comment' button.

Field	Value
Subtotal	0.00
Shipping	
Tax Description (Shipping)	
Handling	
Tax Description (Handling)	
Misc	
Tax Description (Misc)	
Tax Description	
Total Tax	0.00
<b>Total</b>	<b>0.00</b>

### **BELGIUM SUPPLIERS ONLY**



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

## 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.

## 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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Supplier Note

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0

Add File | URL | Text

Discount Amount

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From

\* Supplier

SUPPLIERNAME

Supplier Tax ID

None

\* Invoice From Address

ABCD

123 Success Ave

Results City, XY 99999

United States

\* Remit-To Address

ABCD

123 Success Ave

Results City, XY 99999

United States

\* Ship From Address

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123 Success Ave

Results City, XY 99999

United States

To

Customer

Coupa

\* Bill To Address

No address selected

Buyer Tax ID

Ship To Address

No address selected

Lines

\* Requester Email

\* Requester Name

Line Level Taxation

+ Add Line

Subtotal

0.00

Shipping

Tax Description (Shipping)

0.000

Handling

Tax Description (Handling)

0.000

Misc

Tax Description (Misc)

0.000

Tax Description

0 0.00

+

Total Tax

0.00

Total

0.00

Delete

Cancel

Save as draft

Calculate

Submit


0 Comments

Add Comment

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

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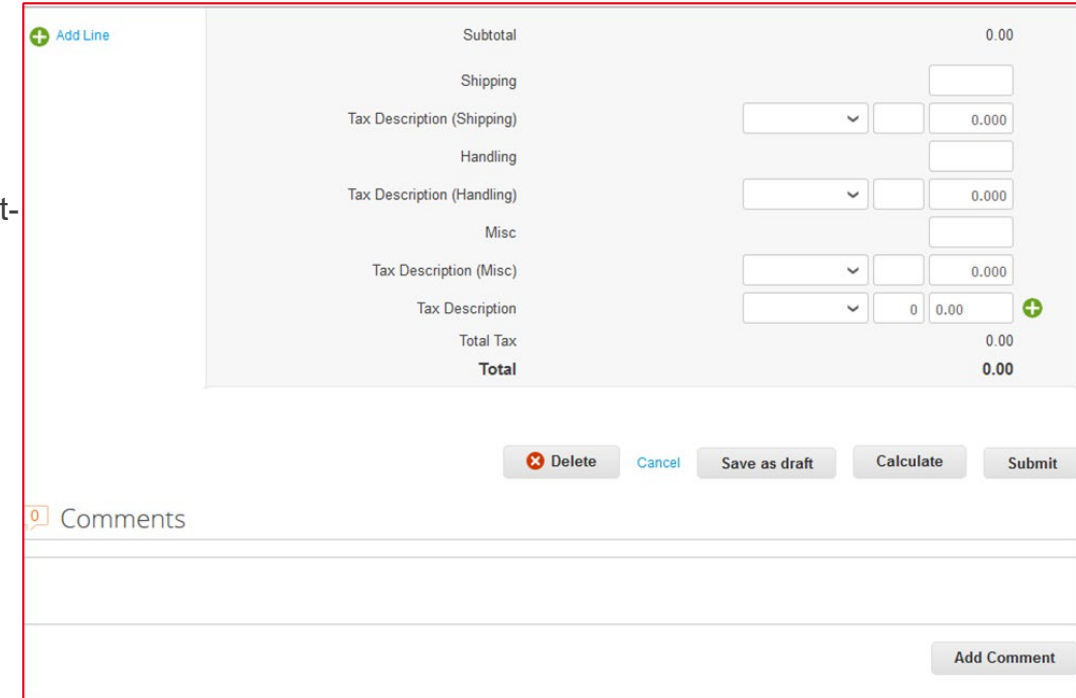
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