

# Job Aid – How to Create an Invoice via Supplier Actionable Notification (SAN)– Coupa Tool

## How to Create an Invoice via Supplier Actionable Notification (SAN)

In this job aid:

✓ **How create an Invoice via Supplier Actionable Notification (SAN)**

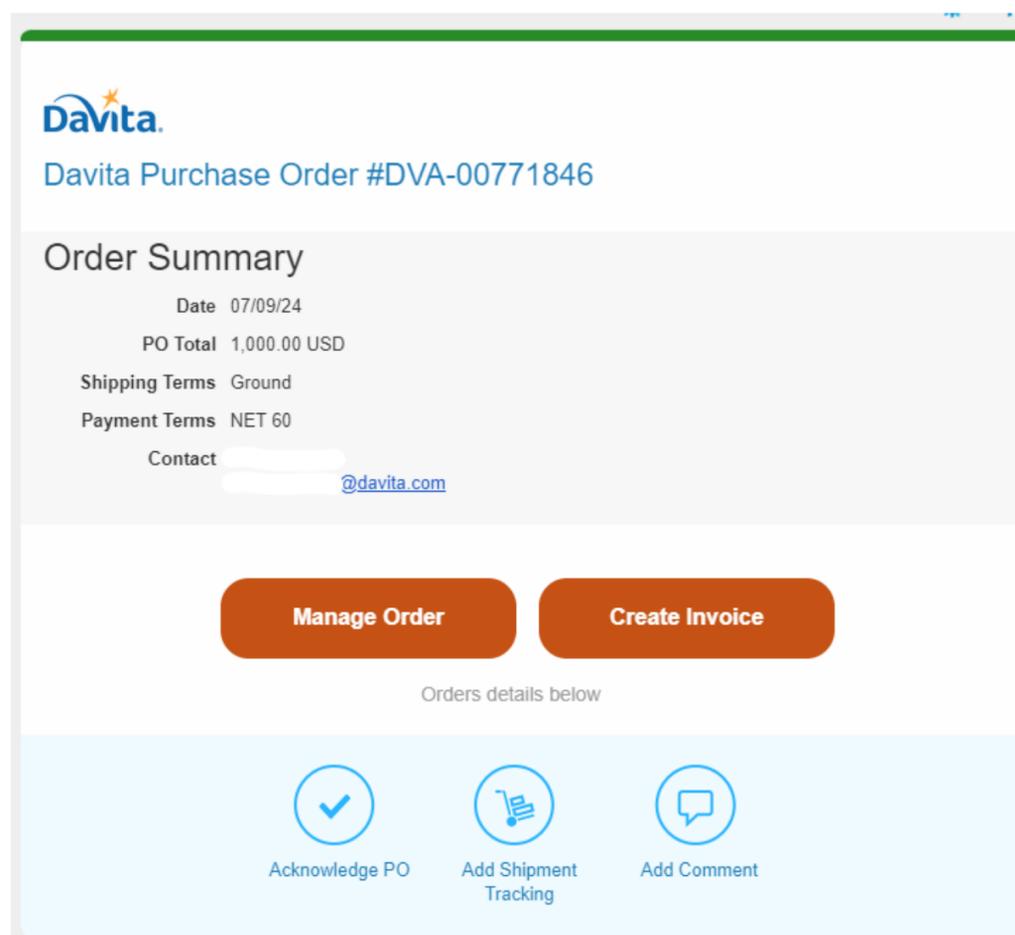
This guide demonstrates how to create an invoice from a Coupa Purchase Order (PO) via Supplier Actionable Notification (SAN).

### Creating an Invoice via SAN Overview

- Supplier Actionable Notifications (SANs) allow suppliers to submit invoices directly to DaVita without logging into the Coupa Supplier Portal (CSP).
- Once a PO has been created, an emailed notification will be sent to the supplier’s PO Email on file in DaVita’s records. This allows suppliers to receive/acknowledge POs and invoice against POs via the Coupa Supplier Actionable Notification (SAN).
- This method is preferred for low volume/one-off transactions.

### Process – Reviewing your Coupa Purchase Order

1. After a Coupa PO has been created by DaVita, suppliers will receive an email notifying them that a Purchase Order has been issued. **NOTE:** This email notification will be sent to the “PO Email” address DaVita has on file in our records. To update your PO Email for DaVita, please contact [DaVitaCoupaSuppliers@davita.com](mailto:DaVitaCoupaSuppliers@davita.com).



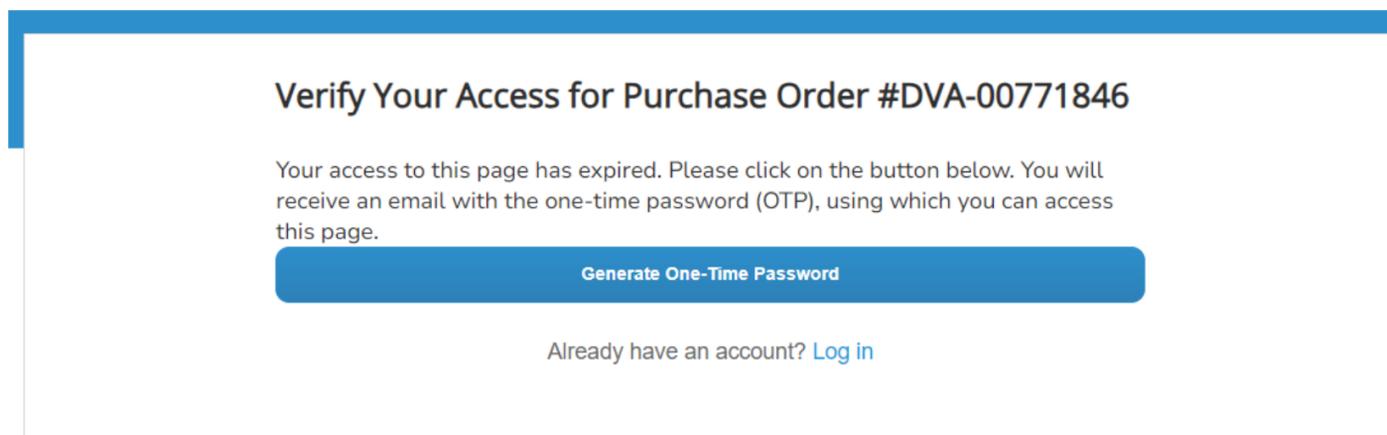
## How to Create an Invoice via Supplier Actionable Notification (SAN)

### Process – Reviewing your Coupa Purchase Order

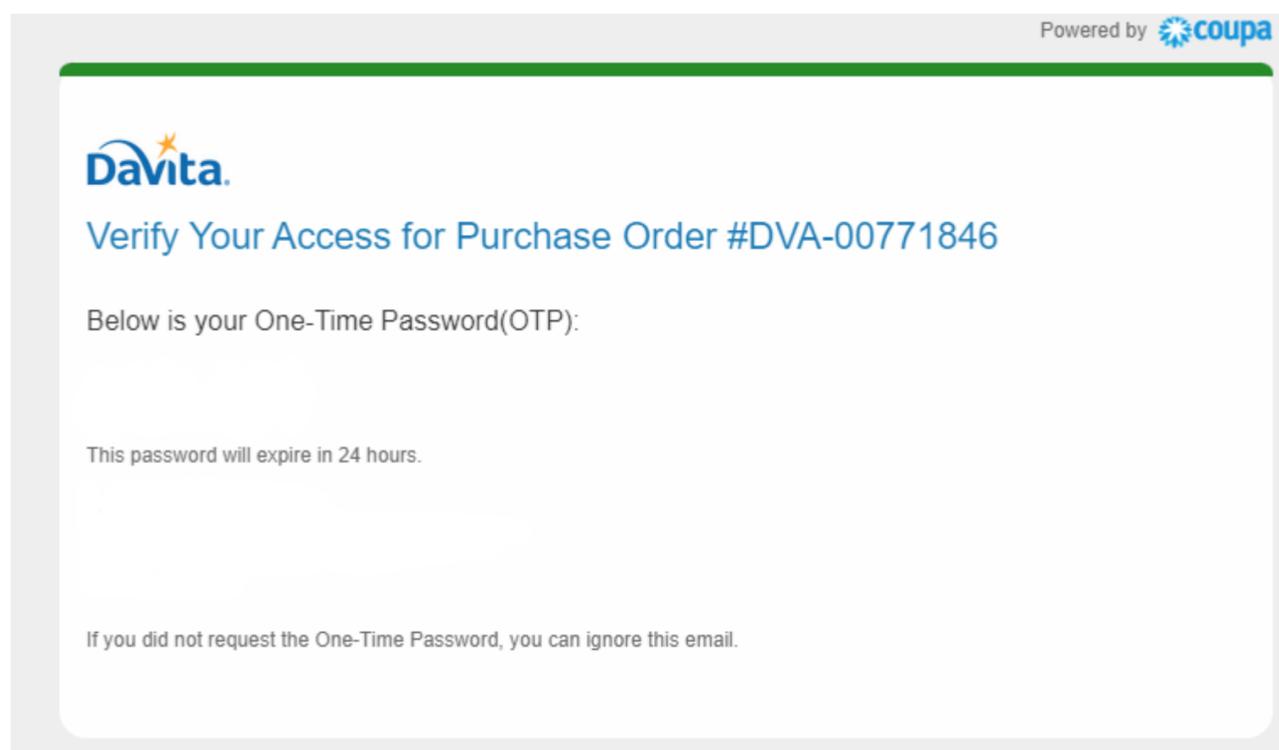
2. From the PO email notification, suppliers can review/acknowledge their PO, create invoices, add shipping/tracking info, etc.

Before action can be taken on your PO, however, suppliers must verify access to their PO via a One-Time Password (OTP). This feature was enabled by Coupa for additional company security.

To navigate to the page below, please click either of the action buttons in the original PO Email.



Once here, suppliers must click the “Generate One-Time Password” button to receive their OTP from Coupa via email. Once obtained, enter the code to verify access to your PO.



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## How to Create an Invoice via Supplier Actionable Notification (SAN)

### Process – Reviewing your Coupa Purchase Order

2. Selecting “Manage Order” will allow you to review important Purchase Order information:

Note: If you do not need to review the provided Purchase Order, you can simply press “Create Invoice” in the previous window. *(proceed to slide 5)*

- PO Number
- Status of the PO
- Order Date
- Revision Date (if applicable)
- Requester’s name
- Requester’s e-mail
- Payment Terms
- Attachments

Select Customer DaVita Inc - DEV ENV

**Purchase Order #DVA-00204003**

**General Info**

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**Status** Issued - Sent via Email

**Order Date** 08/31/22

**Revision Date** 08/31/22

**Requester** Christian Harris

**Email** [example@email.com](mailto:example@email.com)

**Payment Term** NET 45

**Project Code** None

**Attachments** None

**Acknowledged**

**Shipping**

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**Ship-To Address** 12038 Upgrade street  
San Mateo, CA 11111  
United States  
Location Code: 05555  
Attn: Christian Harris

**Phone** 8884847505

**LAN** None

**Terms** Ground

**Lines**

Advanced

Sort by
Line Number: 0 → 9

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### Process – Reviewing your Coupa Purchase Order

3. At a line-item level, you will be able to review all order detailed items.
4. Review product description, quantity, unit of measure (UoM), price and total amount
5. Review the amount already invoiced for that PO
6. Review service start and end dates
7. Review total values for the entire PO
8. If you agree with all aspects of this order, select “Create Invoice”. If not, please contact the DaVita teammate who issued the order for corrections.

The screenshot displays the 'Lines' section of a Coupa purchase order. It features a table with two line items. The first line item is 'General Cleaning Services 2022-2023' with a price of 1,200.00 and a total of 1,200.00. The second line item is 'Buffing' with a price of 500.00 and a total of 500.00. The 'Invoiced' amount for both items is 0.00. A 'Total USD 1,700.00' is shown at the bottom right. A 'Create Invoice' button is highlighted at the bottom center.

Line	Type	Item	Price	Total	Invoiced
1		General Cleaning Services 2022-2023	1,200.00	1,200.00	0.00
2		Buffing	500.00	500.00	0.00

Need By: 09/06/22  
Part Number: None  
Manufacturer Name: None  
Manufacturer Part Number: None  
Service Start Date: 09/05/22  
Service End Date: 09/09/22

Need By: 09/06/22  
Part Number: None  
Manufacturer Name: None  
Manufacturer Part Number: None  
Service Start Date: 09/06/22  
Service End Date: 09/09/22

Total USD 1,700.00

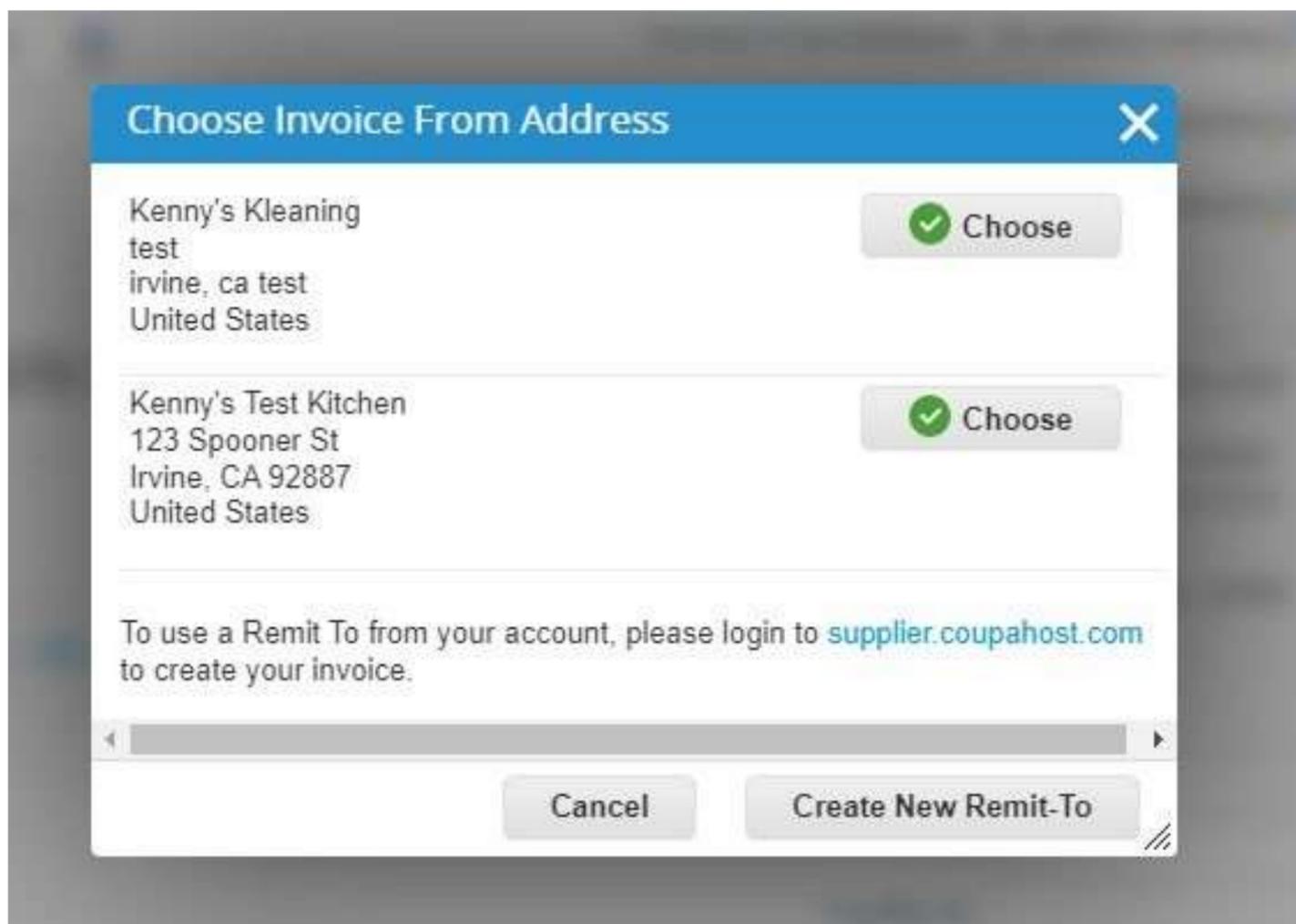
Buttons: Create Invoice, Save, Print View

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## How to Create an Invoice via Supplier Actionable Notification (SAN)

### Process – Creating an Invoice via SAN

1. Once you select “Create Invoice”, you will be prompted to select your Remit-To (Invoice From) Address. If the correct address is not displayed, please select “Create New Remit-To”.



2. Once a Remit-To address is selected, you will need to manually add some information in the General Info Section:

- Invoice Number (mandatory)
  - Must be unique. Do not reuse Invoice Numbers
- Invoice Date (mandatory)
- Image Scan (mandatory)
- Supplier Note (optional)
- Attachments (optional)

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### Process – Reviewing your Coupa Purchase Order

3. If applicable, manually add information to the To section:

- PO Reference (optional)
- Facility ID (optional)
- Customer Account Number (optional)

To

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**Customer** DaVita Inc - DEV ENV

**\* Ship To Address** 12038 Upgrade street  
San Mateo, CA 11111  
United States  
Location Code: 05555

**Phone** 8884847505

**LAN** None

**PO Reference**

**Facility ID**

**Project Code** None

**Customer Account Number**

4. Review the values on the invoice line(s).

5. By default, Coupa will include lines for all items listed on the PO. If a PO contains multiple lines, one can invoice specific line(s) on the PO by removing all other lines from the invoice before submitting (use the red X contained in each line to delete).

Lines  Line Level Taxation

Type	Description	Price	
	General Cleaning Serv	1,200.00	1,200.00 <span style="border: 2px solid orange; padding: 2px;">✕</span>

**PO Line** DVA-00204003-1 🔍 Clear

**Contract**

**Supplier Part Number**

**UNSPSC** None

**Serial Number**

**Service Start Date** 09/05/22

**Service End Date** 09/09/22

**Billing Note**

**Billing**  
05555-100025-0986-7832-600-000-00000-000000-00000

## How to Create an Invoice via Supplier Actionable Notification (SAN)

### Process - Submit Invoices to DaVita for Review and Payment

1. Manually add information to the Totals & Taxes section (if applicable).
2. Click Calculate to determine the total amount.
3. Submit the invoice once finished.

Totals & Taxes	
Lines Net Total	1,200.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.00
Total Tax	0.00
Net Total	1,200.00
<b>Total</b>	<b>1,200.00</b>

Buttons: Delete, Cancel, Save as Draft (2), Calculate, Submit (3)

4. A pop-up window will appear, to send the invoice to DaVita select “Send Invoice”. Once an invoice is sent, suppliers will not be able to add edits unless a DaVita Teammate sends the invoice back for corrections.

**Are You Ready to Send?**

You're about to send an invoice to **DaVita Inc - DEV ENV** for a total amount of **1,200.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Buttons: Continue Editing, Send Invoice

# Job Aid – How to Create an Invoice via Supplier Actionable Notification (SAN)– Coupa Tool

## How to Create an Invoice via Supplier Actionable Notification (SAN)

### Process - Review Invoice and Payment Status

1. Click on the Invoice number to access the complete details of the Invoice.
2. Note the status for your recently submitted Invoice(s). Statuses will update pending DaVita review.
3. Click the associated PO number to see details of the PO.

Export to		View		All		Search		
1	Invoice #	Created Date	Status 2	PO # 3	Total	Unanswered Comments	Dispute Reason	Actions
	TEST - 123456	09/15/22	Processing	DVA-00204003	1,200.00 USD	No		

Status	Description
Draft	Invoice created but not yet submitted.
Processing	Invoice is transferring to DaVita.
Pending Approval/Action	Awaiting further processing at DaVita.
Approved	Invoice accepted for payment.
Disputed	Invoice has been rejected as it contains an error. To resolve invoice disputes, please see our job aid: <i>How to Resolve an Invoice Dispute</i>
Voided	DaVita has voided your invoice. Review the void reason in the comments to determine if the invoice needs to be resubmitted.

4. Payment details can be found at the bottom of the invoice once you have clicked into the invoice number.

Payments ⌵

Status Pending Document Approval

Paid-in-Full Date None

Payment Reconciliation Details

Status	Date	Type	Description	Amount
			Total Reconciled	0.00
			Invoice Total	1,890.00
			<b>Remaining Balance</b>	<b>1,890.00</b>

Once paid, Coupa will display the Payment Status, Paid-In-Full Date, and relevant payment numbers and details.