



# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

In this job aid:

#### ✓ How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

This job aid is to be leveraged by suppliers that have been selected to transact with DaVita and have an existing account on the Coupa Supplier Portal (CSP), or the ability to create a CSP account. This job aid will outline how to create invoices directly from a Purchase Order submitted by a DaVita Teammate.

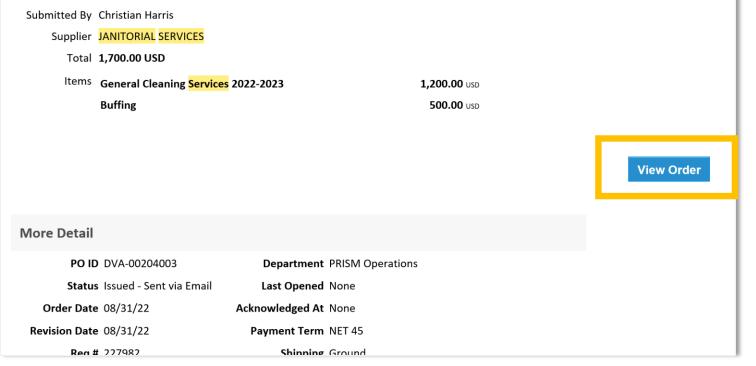
# **Purchase Order (PO) Flip Overview**

- Navigate to DaVita POs within the CSP
- Review DaVita POs and Line-Item information
- Create Invoices for DaVita POs
- Submit Invoices to DaVita for review and payment
- Create and submit Invoices for reoccurring services
- If you have questions regarding the CSP, please refer to our Procurement webpage, <u>https://www.davita.com/about/suppliers</u>.

# **Process - Navigate to DaVita Purchase Orders**

- 1. With a set-up CSP account, you will receive email notifications for POs sent by DaVita. Notifications will include PO details and a link to review the order in your CSP account
- 2. To view the PO, click the "View Order" button and it will be redirected to the CSP Log in page.

DaVita Inc - DEV ENV <do_not_reply@davita-dev.coupahost.com> To @Harris, Christian A.</do_not_reply@davita-dev.coupahost.com>	← Reply	Keply All	- Wed
<ul> <li>(i) If there are problems with how this message is displayed, click here to view it in a web browser.</li> <li>Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.</li> </ul>	age.		wea
DaVita Inc - DEV ENV Purchase Order #DVA-00204003			
Hi Christian,			
You have received a new purchase order #DVA-00204003 from DaVita Inc - DEV ENV Company.			









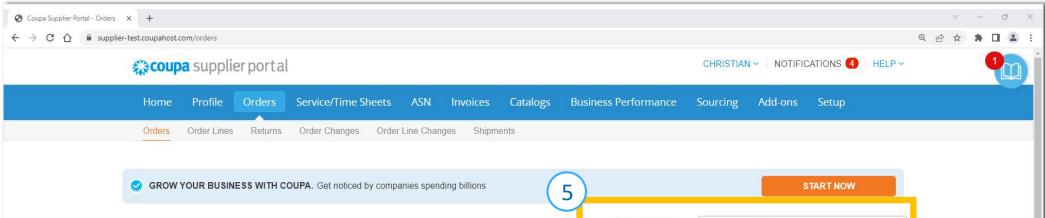
# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

# **Process - Navigate to DaVita Purchase Orders**

3. Enter your log-in information to access your CSP account and review the PO.

Welcome back! Login or cli	ck here for help.
* Email Address	suppliertest.se@gmail.com
* Password	Password
	Log In
	Forgot Your Password?

- 4. From the Orders page, you will get the list of POs sent by all of your customers on Coupa.
- 5. Using the select customer dropdown on the right-hand side, users can sort for POs from a specific customer. Select DaVita.
- 6. You will see a list of all POs, their status, amount, and the option to flip them into Invoice or Credit Note.



Purchase O	rders	5					
		Click the	Action to Invoice from a l	Purchase Order			
Export to 👻				View All	✔ S	earch	0
PO Number Order Da	e Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
DVA- 08/31/22 00204003	Issued	None	General Cleaning Services 2022-2023 Buffing	No	1,700.00 USD		
00204001	issued	None	Duning ana/or burnishing bervices	NU .	300.00 USD		-8 <b>-8</b>
DVA- 08/30/22 00204000	Issued	None	General Services Cleaning Fee - 30 August 2022	No	12,000.00 USD		







# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

### **Process - Review DaVita POs and Line-Item Information**

- 1. After clicking on the PO number on the list, the system will display all the details of the PO.
  - PO Number
  - Status of the PO
  - Order Date
  - Revision Date (if applicable)
  - Requester's name
  - Requester's e-mail
  - Payment Terms
  - Attachments
  - After the PO is reviewed, ensure to acknowledge the PO by clicking the box

	Selec	t Customer	DaVita Inc - DEV ENV	▼
Purchase Order #DVA-00204	1003			
🔅 General Info	🔗 Shipping			
Status Issued - Sent via Email	Ship-To Address	12038 Upgrad		
Order Date 08/31/22		San Mateo, C/ United States	A 11111	
Revision Date 08/31/22		: 05555		
2 Requester Christian Harris	Phone	Harris		
<sub>Email</sub> example@email.com	LAN	None		
Payment Term NET 45	Terms	Ground		
Project Code None				
Attachments None				
Acknowledged				



2.

Note: If you do not agree with any aspect of the order, please alert the requester by sending your concerns to the requester's email address or by leaving a comment directly on the PO. Suppliers are

Search

Advanced

**Sort by** Line Number:  $0 \rightarrow 9$ 

not able to reject POs. To have a PO removed, reach out to the requester to have it closed by DaVita.

P Comments	Mute Comments
Enter Comment	
Add File   URL	
Send Comment notification to a user by typing @name (ex. @JohnSmith)	
	Add Comment







# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

# **Process - Review DaVita POs and Line-Item Information**

- 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. Action buttons

	Lines								
				Advanc	ed Search	h	🔎 Sort by	Line Number: 0	→ 9 <b>~</b>
4	Туре 🙃	<b>Item</b> General Cleaning	g Services 2022-2023		<b>Price</b> 1,200.00	<b>Total</b> 1,200.00		5	Invoiced 0.00
	Need By 09/06/22	Part Number None	Manufacturer Name None	Manufacturer Part Number None	<b>Service Star</b> 09/05/22		Service End Date 09/09/22	6	
2	Туре	<b>Item</b> Buffing			<b>Price</b> 500.00	<b>Total</b> 500.00			Invoiced 0.00
	Need By 09/06/22	Part Number None	Manufacturer Name None	Manufacturer Part Number None	<b>Service Star</b> 09/06/22		Service End Date 09/09/22		

	7	Total US	D <b>1,700.00</b>		
8	Crea	te Invoice	Save	Print View	



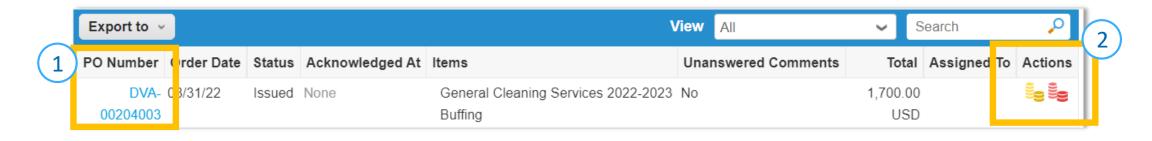


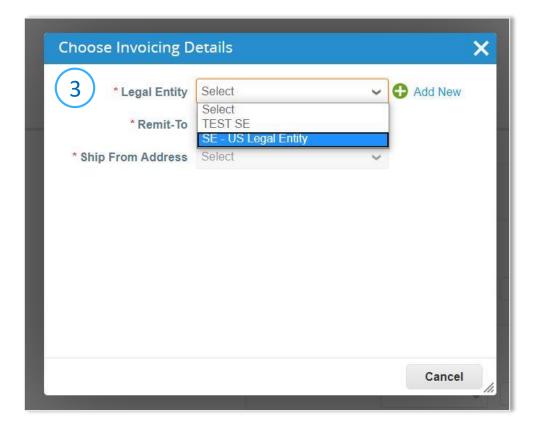


# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

### **Process - Create Invoices for DaVita POs**

- 1. To start the invoicing process, first identify the PO to be invoiced.
- 2. Click on the Golden Coins icon to flip the PO into an invoice.
- 3. After clicking the Golden Coins Icon, if you have two or more legal entities setup on your account you will need to choose which legal entity you will use.





- 4. After choosing your legal entity, you will need to manually add some information on the General Info section.
  - Invoice Number (mandatory)



- Must be unique. Do not reuse Invoice Numbers
- Date of Supply (optional)
- Delivery Number (optional)
- Shipping Term (optional)
- Invoice Image Scan (optional)
- Supplier Note (optional)
- Attachments (optional)

Revised 10/13/2022

- Discount Amount (optional)
- Payment Order Reference (optional)

-	
* Invoice #	
* Invoice Date	09/15/22
Payment Term	NET 45
* Currency	USD 🐱
Status	Draft
Image Scan	Choose File No file chosen
Supplier Note	
Attachments	Add File   URL   Text

#### For questions contact DaVitaCoupaSuppliers@davita.com







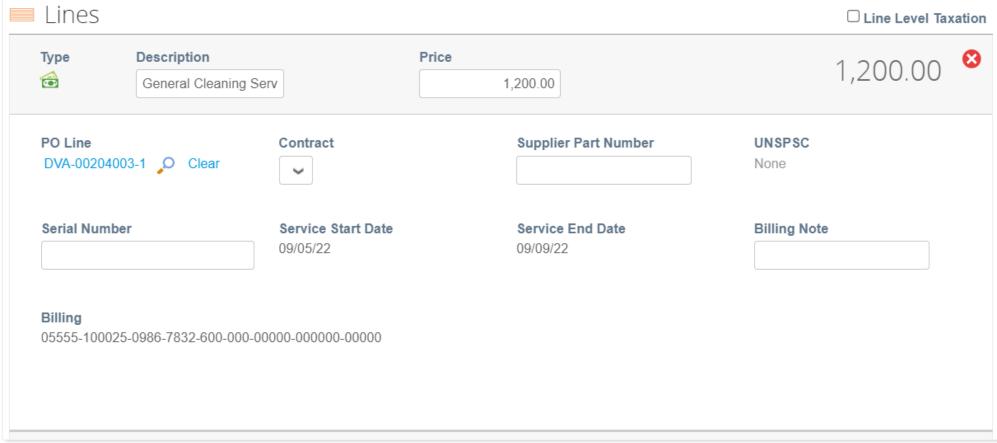
## How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

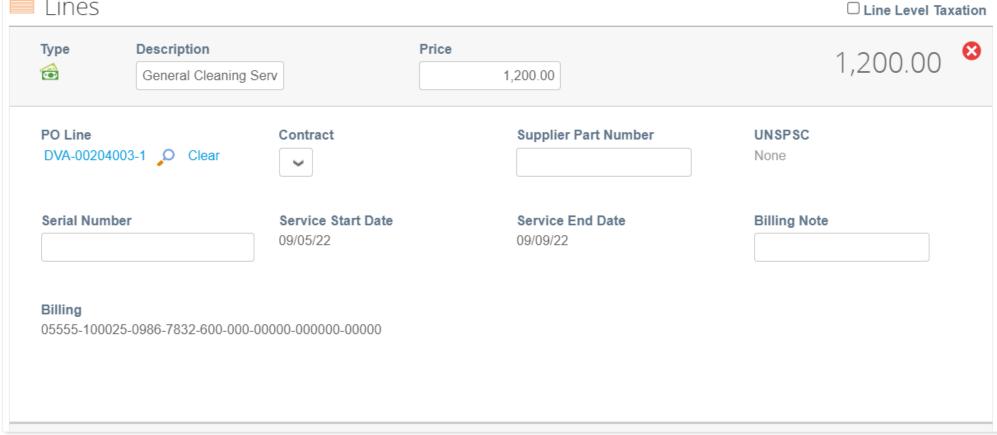
### **Process - Create Invoices for DaVita POs**

- 5. If applicable, manually add information to the To section.
  - PO Reference (optional) •
  - Facility ID (optional) ٠
  - Customer Account Number (optional) ٠

DaVita Inc - DEV ENV	
12038 Upgrade street San Mateo, CA 11111 United States Location Code: 05555	
8884847505	
None	
None	
	12038 Upgrade street San Mateo, CA 11111 United States Location Code: 05555 8884847505 None

- Review the values on the invoice line(s). 6.
- By default, Coupa will include lines for all items listed on the PO. To invoice for specific line(s) on the 7. PO, remove all other lines from the invoice before submitting. For details, see the process "Create and Submit Invoices for Reoccurring Services" starting on page 8.











# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

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

- 1. Manually add information to the Totals & Taxes section, as necessary.
- 2. Click Calculate to determine the total amount.
- 3. Submit the invoice once finished.

act	Totals & Taxes	
	Lines Net Total	1,200.00
	Shipping	
	Handling	
	Misc	
	Tax	• 0.000 % 0.00
	Total Tax	0.00
	Net Total	1,200.00
	Total	1,200.00
D	elete Cancel	Save as Draft Calculate Submit

- 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 <b>DaVita Inc - D</b> you'll have to contact your customer directly to ma		of <b>1,200.00</b> . Once sent,
	Continue Editing	Send Invoice



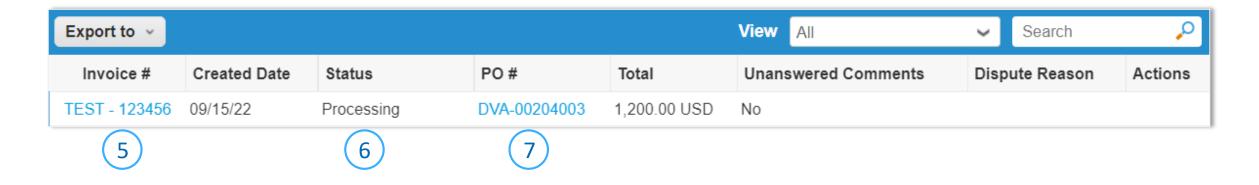




# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

# Process - Submit Invoices to DaVita for Review and Payment

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



Status	Description
Draft	Invoice created but not yet submitted
Processing	Invoice is transferred to DaVita
Pending	Awaiting further processing at DaVita
Approved	Invoice accepted for payment
	Invoice is rejected as it contains an error. Credit note must be created
Disputed	to fully offset the invoice

# **Process - Create and Submit Invoices for Reoccurring Services**

- For Purchase Orders related to reoccurring services, you may receive a Purchase Order that contains 1. 12 lines outlining the months of the year. The following steps will guide you on how to invoice against each of these lines ONLY at the appropriate time.
- For the applicable Purchase Order, click "Create Invoice"

#### 2.

Export to ~					View All		<b>~</b> S	Search	₽
PO Number	Order Date	Status	Acknowledged At	ltems	Unanswered	Comments	Total	Assigned 1	o Actions
DVA- 00204098	10/14/22	Issued	None	January - General Facility Cleaning February - General Facility Cleaning March - General Facility Cleaning	No	Create invo	3,000.00		8 Create invoice
DVA-	09/27/22	Issued	None	General Services Cleaning Fee -	No		1,200.00		







# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

### <u>Process - Create and Submit Invoices for Reoccurring Services</u>

- 3. Note the Total at the bottom of the window, this is the total amount that will be invoiced for all lines or months included on the Purchase Order for reoccurring services.
- 4. <u>Delete all lines that are not applicable for the services in which you are invoicing</u>. For example, if you only want invoice January on an invoice that covers 12 months, you must delete 11 lines for February through December.

	Description		Daire				
Type	Description General Services Cl	ear	Price 1,200.	.00		1,200.00	8
PO Line DVA-0020406	63-1 🔎 Clear	Contract	Sup	plier Part Number	UNSPSC None		
Serial Numbe	er	Service Start Date 01/01/22		vice End Date	<b>Recurring</b> Yes	Service?	
Billing Note							
<b>Billing</b> 05555-100025	5-0986-7832-600-000-0	0000-000000-00000					
							_
iype	Description General Services Cl	ear	Price 1,200.	.00		1,200.00	Delete lin
PO Line DVA-0020406	63-2 O Clear	Contract	Sup	plier Part Number	UNSPS None		
Billing Note		Service Start Date 02/01/22		vice End Date 18/22	Recurring Yes	service?	
Billing Note	er 	02/01/22				j Service?	
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	02/2	18/22		service?	
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	02/2	:8/22 xes		2,400.00	
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	ontract	128/22 Ixes et Total			
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	ontract Totals & Ta Lines Ne	IXES et Total			
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	ontract Totals & Ta Lines Ne Shipping	IXES et Total			
Billing Note Billing 95555-100025	5-0986-7832-600-000-0	02/01/22	ontract Totals & Ta Lines Ne Shipping Handling	IXES et Total		2,400.00	
	5-0986-7832-600-000-0	02/01/22	ontract Totals & Ta Lines Ne Shipping Handling Misc	128/22 ixes et Total g g 	Yes	2,400.00	.00







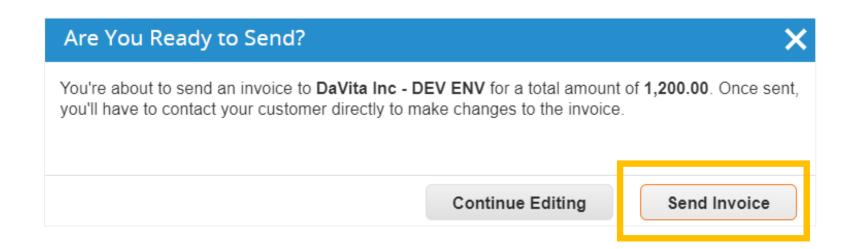
# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

#### **Process - Create and Submit Invoices for Reoccurring Services**

After deleting invoice lines that are not applicable, notice the reduced total amount that will be 5. invoiced

Type	Description	P	rice	4 200 00
6	General Services C	lear	1,200.00	1,200.00
PO Line DVA-00204	063-1 O Clear	Contract	Supplier Part Number	UNSPSC None
Serial Num	ber	Service Start Date 01/01/22	Service End Date 01/31/22	Recurring Service? Yes
Billing Note	2			
Billing				
	125-0986-7832-600-000-0	0000-00000-00000		
Add Line	Pick lines from PO	Pick lines from Contra	ct Totals & Taxes	
			Lines Net Total	1,200.00
			Shipping	
			Handling	
			Handling Misc	
				♥ 0.000 % 0.00
			Misc	♥ 0.000 % 0.00
			Misc Tax Total Tax	0.0
			Misc Tax	

- Follow steps in Pages 5 7 to review and submit an Invoice for the required line(s) 6.









# How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)

# **Process - Create and Submit Invoices for Reoccurring Services**

7. A warning will appear, to confirm click Submit.

