Supplier Quick Reference Guide #1: **Getting started and Invoice creation**

1. Getting started with Coupa Supplier Portal (CSP)

To transact with PMI using electronic channels you need:

1. To be invited by PMI to join the Coupa Supplier Portal. Invitation will come from the following mailbox: Coupa for Suppliers <do_not_reply@supplier.coupahost.com>
2. To set up an account in Coupa Supplier Portal **click the link at the bottom of the invitation.**

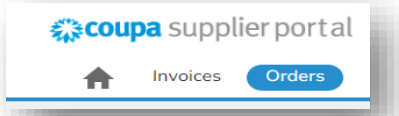
Having troubles or need more info? For training or technical support
See the additional materials: https://www.pmi.com/suppliers/platforms-how-to-invoice-pmi/coupa-supplier-support or contact with Coupa.SupplierDesk@pmi.com.

You need to understand

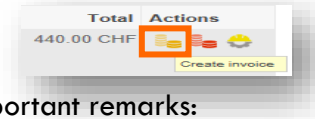
- As your company joins the Coupa platform, responsible person needs to **accept Coupa's Terms of Use.**
- When you issue an electronic invoice through Coupa, this is **the one and only legal invoice.**
- **Don't send** us any **duplicate** of this invoice by paper or PDF.

2. Creating an invoice (1/3)

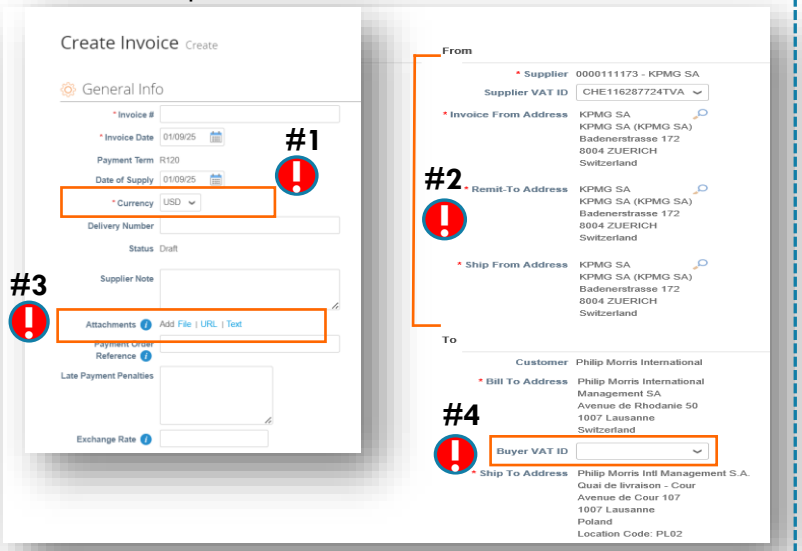
I. Since **all electronic invoices for PMI have to be PO-based,** you need to go into the **Orders tab** to create an invoice:



II. **Choose proper PO** (please **check invoices** which were already **issued for this PO** before you create invoice) and click **Create invoice icon:**



III. Populate **invoice header:**



Important remarks:

1. (!) Invoice currency has to follow the PO currency

2. (!) Make sure, your address details are correct

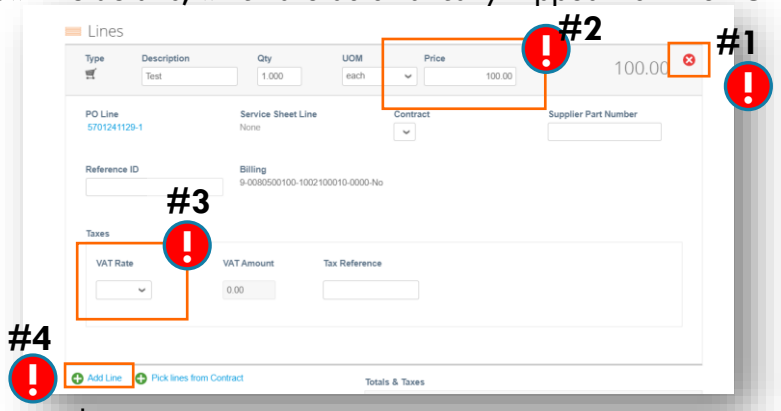
3. (!) Don't attach PDF invoice to the electronic one. It will not be considered as legal in such case.

Add supporting documents to Attachments, not to Image scan.

4. (!) Buyer VAT ID should be driven by the country of delivery.

2. Creating an invoice (2/3)

IV. Review **line details,** which are automatically flipped from the PO



Important remarks:

1. (!) If you don't want to invoice some PO lines, delete them from the Invoice

2. (!) Price cannot be 0. Don't submit lines with 0 total. Simply, delete the whole line

3. (!) Do not choose 0% VAT rate or Exempt, if your invoice is subject to VAT. Carefully select the correct VAT rate

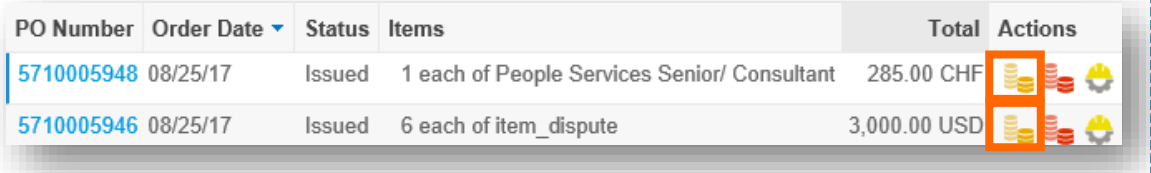
4. (!) In case of **additional expenses** (transportation or handling, insurance costs, etc.) or **discounts,** non-PO line should be added by using "Add line" button

Supplier Quick Reference Guide #1: **Getting started and Invoice creation**

2. Creating an invoice (3/3)

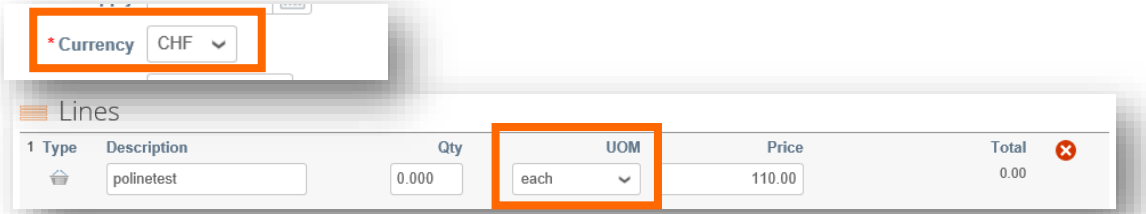
Important remarks:

(!) An invoice can be associated only to 1 PO – if you need to invoice 2 POs, please create 2 invoices.

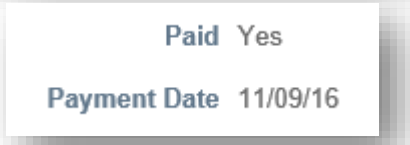


(!) PO-lines: it's important to read description and issue invoice against proper PO line, e.g. put correct cost vs. corresponding monthly line from a PO.

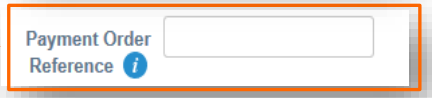
(!) Do not change Unit of Measure and currency – it should stay the same as in PO.



(!) Once the invoice is paid, you will receive the payment date indication in the Invoice in CSP.



(!) Swiss invoicing and POR payment: put POR/ISR information in Payment Order Reference in case payment should be done through Swiss Postal Service.

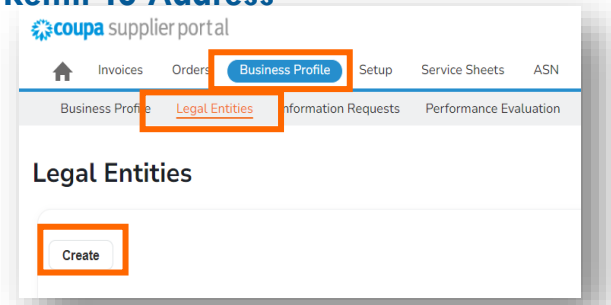


Keep the sequence of short number/long number: 00-00000-0/ 000000000000000000000

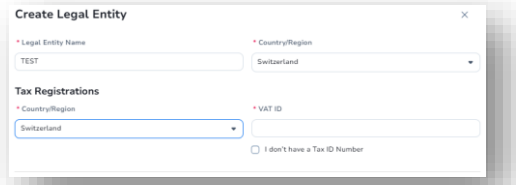
If these details are missing, payment will be done through supplier's bank account (from PMI Vendor Master Data)

3. Setting up Remit-To Address

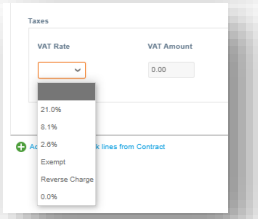
To speed-up Invoice creation in CSP, you can define your Company legal entity details under Business Profile - Legal Entities subtab.



(!) Tax registration country of your Legal entity defines the legal invoice template, including **VAT rates**.



Invoice:

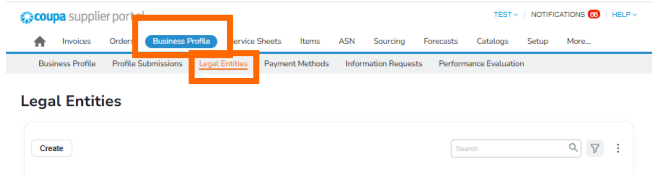


(!) Please remember that only for **Belgium, Germany** and **South Africa** bank details in *Payment Method (previously called Remit-to)* are mandatory. If your company is registered elsewhere – do not fill this field. PMI Vendor Master Data is a database keeping records already shared by vendors so related bank details will be used.

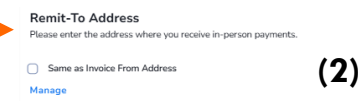
In order to inform/update PMI regarding
- ***Bank details***
- ***Registration address***

or other information about your legal entity please, contact VendorMasterData.PMISCEFIN@pmi.com

(!) You can edit existing *Remit-To Address*. If you want to change any details, go to the respective legal entity (1) and then existing untick the button and click manage (2).



(1)



(2)