

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.coupa.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

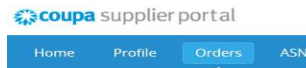
See the additional materials: <https://www.pmi.com/suppliers/platforms-how-to-invoice-pmi/coupa-supplier-support> or contact with Coupa.SupplierDesk@pmi.com.

You need to understand

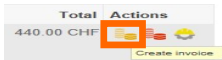
- As your company joins the Coupa platform, responsible person needs to **accept Coupa's Terms of Use**
- When you issue an electronic invoice through Coupa, this is **the one and only legal invoice**
- **Don't send us any duplicate** of this invoice by paper or PDF

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:

The screenshot shows the 'Create Invoice' form with the following annotations:

- #1**: Points to the 'Currency' field, which is set to 'CHF'.
- #2**: Points to the 'Supplier' and 'Supplier VAT ID' fields.
- #3**: Points to the 'Image Scan' field.
- #4**: Points to the 'Buyer VAT ID' field.

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.
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

The screenshot shows the 'Review line details' form with the following annotations:

- #1**: Points to the 'Total' field, which is 0.00.
- #2**: Points to the 'Price' field, which is 0.00.
- #3**: Points to the 'PO Line' field, which is 5710005228.
- #4**: Points to the 'Add Line' button.

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

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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 Number	Order Date	Status	Items	Total	Actions
5710005948	08/25/17	Issued	1 each of People Services Senior/ Consultant	285.00 CHF	
5710005946	08/25/17	Issued	6 each of item_dispute	3,000.00 USD	

(!) 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

*Currency: CHF

1	Type	Description	Qty	UOM	Price	Total
		pollinetest	0.000	each	110.00	0.00

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

Paid Yes
Payment Date 11/09/16

(!) Swiss invoicing and POR payment: put POR/ISR details in Payment Order reference:

Payment Order Reference

Keep the sequence of **short number/long number**:
00-00000-0/00000000000000000000000000000000

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:

coupa supplier portal

Home Profile Orders ASN Invoices Catalogs Admin

E-Invoicing Setup Add Legal Entity

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

What is your Tax ID?

Country: Algeria

VAT ID:

Invoice:

VAT Rate	VAT Amount	Tax Reference
20.0%	0.000	
5.0%		
0.0%		
Exempt		

(!) Please remember that only for **Belgium, Germany and South Africa** bank details in Remit-to section 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.PMISCFIN@pmi.com

(!) There is no possibility to edit existing *Supplier Remit-to*. If you want to change any details, deactivate (1) existing *Supplier Remit-to* and create a new one (2).

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To (2)

Remit-To	Banking Information	Status
Street and House Bigcity 11111	None	Deactivated

Manage (1)