

## Job Aid – Supplier: How to Create an Invoice via PO Flip in the CSP – Coupa Tool

### 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, <https://www.davita.com/about/suppliers>.

#### 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.

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.

Submitted By: Christian Harris  
Supplier: JANITORIAL SERVICES  
Total: 1,700.00 USD

Items	Amount
General Cleaning Services 2022-2023	1,200.00 USD
Buffing	500.00 USD

[View Order](#)

**More Detail**

PO ID: DVA-00204003	Department: PRISM Operations
Status: Issued - Sent via Email	Last Opened: None
Order Date: 08/31/22	Acknowledged At: None
Revision Date: 08/31/22	Payment Term: NET 45
Req #: 227982	Shipping: Ground

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#### Process - Navigate to DaVita Purchase Orders

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

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.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
DVA-00204003	08/31/22	Issued	None	General Cleaning Services 2022-2023 Buffing	No	1,700.00 USD		
DVA-00204001	08/30/22	Issued	None	Building and/or Furnishing Services	No	500.00 USD		
DVA-00204000	08/30/22	Issued	None	General Services Cleaning Fee - 30 August 2022 ...	No	12,000.00 USD		

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

- 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

Select Customer: DaVita Inc - DEV ENV

### Purchase Order #DVA-00204003

**General Info**

Status: Issued - Sent via Email

Order Date: 08/31/22

Revision Date: 08/31/22

**2** Requester: Christian Harris  
Email: example@email.com

Payment Term: NET 45

Project Code: None

Attachments: None

Acknowledged:

**Shipping**

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 Search Sort by Line Number: 0 → 9

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

Comments Mute Comments ▾

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

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#### 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**

Advanced Search Sort by Line Number: 0 → 9

4	Type	Item	Price	Total	5	Invoiced
		General Cleaning Services 2022-2023	1,200.00	1,200.00		0.00
	<b>Need By</b>	<b>Part Number</b>	<b>Manufacturer Name</b>	<b>Manufacturer Part Number</b>	<b>Service Start Date</b>	<b>Service End Date</b>
	09/06/22	None	None	None	09/05/22	09/09/22
2	<b>Type</b>	<b>Item</b>	<b>Price</b>	<b>Total</b>		<b>Invoiced</b>
		Buffing	500.00	500.00		0.00
	<b>Need By</b>	<b>Part Number</b>	<b>Manufacturer Name</b>	<b>Manufacturer Part Number</b>	<b>Service Start Date</b>	<b>Service End Date</b>
	09/06/22	None	None	None	09/06/22	09/09/22

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7 Total USD 1,700.00

8 Create Invoice Save Print View

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### 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.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
DVA-00204003	03/31/22	Issued	None	General Cleaning Services 2022-2023 Buffing	No	1,700.00 USD		

#### Choose Invoicing Details

3 \* Legal Entity  + Add New

\* Remit-To

\* Ship From Address

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

#### General Info

\* Invoice #

\* Invoice Date

Payment Term NET 45

\* Currency

Status Draft

Image Scan  No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

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#### Process - Create Invoices for DaVita POs

5. 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**

6. Review the values on the invoice line(s).
7. By default, Coupa will include lines for all items listed on the PO. To invoice for specific line(s) on the 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.

Lines  Line Level Taxation

Type	Description	Price	
	General Cleaning Serv	1,200.00	1,200.00 <span style="color: red;">✖</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**  
05555-100025-0986-7832-600-000-000000-000000

## 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.

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, 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 **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**

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#### 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.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TEST - 123456	09/15/22	Processing	DVA-00204003	1,200.00 USD	No		

5

6

7

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
Disputed	Invoice is rejected as it contains an error. Credit note must be created to fully offset the invoice

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

1. For Purchase Orders related to reoccurring services, you may receive a Purchase Order that contains 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.
2. For the applicable Purchase Order, click “Create Invoice”

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
DVA-00204098	10/14/22	Issued	None	January - General Facility Cleaning February - General Facility Cleaning March - General Facility Cleaning	No	3,000.00		 Create invoice for PO #DVA-00204098 <input type="button" value="Create invoice"/>
DVA-00204098	09/27/22	Issued	None	General Services Cleaning Fee -	No	1,200.00		 <input type="button" value="Create invoice"/>



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

- 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.
- Delete all lines that are not applicable for the services in which you are invoicing. For example, if you only want invoice January on an invoice that covers 12 months, you must delete 11 lines for February through December.

The screenshot displays the 'Lines' section of the Coupa Supplier Portal. It shows two invoice lines for 'General Services Clear' at a price of 1,200.00 each. The first line has a service start date of 01/01/22 and a service end date of 01/31/22. The second line has a service start date of 02/01/22 and a service end date of 02/28/22. A yellow box highlights the 'Delete line' button next to the price '1,200.00' of the first line, with a circled '4' next to it. Below the lines is a 'Totals & Taxes' section. The 'Lines Net Total' is 2,400.00. The 'Total' amount is highlighted with a yellow box and a circled '3'. At the bottom of the interface are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'.

Type	Description	Price
General Services Clear	General Services Clear	1,200.00
General Services Clear	General Services Clear	1,200.00

Totals & Taxes	
Lines Net Total	2,400.00
Shipping	
Handling	
Misc	
Tax	0.000 % 0.000
Total Tax	0.00
Net Total	2,400.00
<b>Total</b>	<b>2,400.00</b>

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

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

The screenshot displays the 'Lines' section of the Coupa Supplier Portal. It features a table with one line item: 'General Services Clear' with a price of 1,200.00. Below the table, there are several input fields and dropdown menus for additional details like PO Line, Contract, and dates. To the right, a 'Totals & Taxes' summary shows a 'Total' of 1,200.00, which is highlighted with a yellow box. At the bottom of the form, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'.

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

The screenshot shows a confirmation dialog box with a blue header 'Are You Ready to Send?' and a close button (X). The main text reads: '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.' At the bottom, there are two buttons: 'Continue Editing' and 'Send Invoice', with the 'Send Invoice' button highlighted by a yellow box.

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

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

