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

In this job aid:

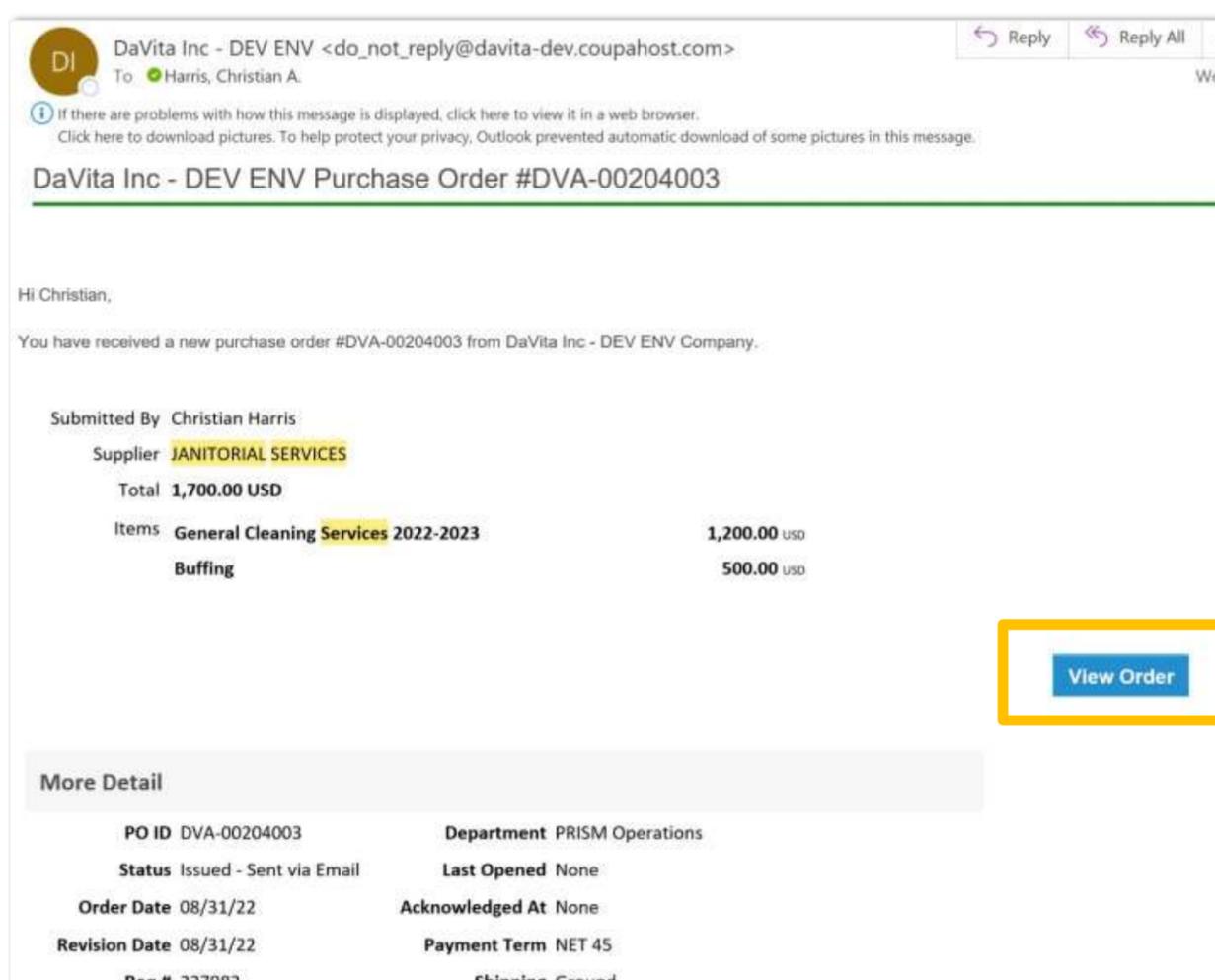✓ **How to Create an Invoice via PO Flip in the Coupa Supplier Portal (CSP)**

This job aid is to be leveraged by suppliers that have been enabled 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.

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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.

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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

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

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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

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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
    -   Invoice Image Scan (mandatory)
    -   Supplier Note (optional)
    -   Attachments (optional)

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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)

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

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

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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.

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.

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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		

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: *How to Resolve an Invoice Dispute*
Voided	DaVita has voided your invoice. Review the void reason in the comments to determine if the invoice needs to be resubmitted.

Process - Create and Submit Invoices for Multi-Line POs

DaVita may issue your company a Purchase Order that contains multiple lines (Ex: An Annual PO for recurring monthly services with 12 lines – 1 pertaining to each month of service). When invoicing against a Purchase Order with multiple lines, suppliers should delete lines for charges that are not specific to the invoice they are currently creating.

1.   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-002040 8 Create invoice
DVA-09/27/22	09/27/22	Issued	None	General Services Cleaning Fee -	No	1,200.00		

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Process - Process - Create and Submit Invoices for Multi-Line POs

2. Note the Total at the bottom of the window, this is the total amount that will be invoiced for all lines included on the Purchase Order.

3. <u>Delete all lines that are not applicable to the services in which you are invoicing</u>. For example, if you are submitting an invoice for January against a PO that covers 12 months, you must delete 11 lines for February through December.

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Process - Process - Create and Submit Invoices for Multi-Line POs

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

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

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Process - Process - Create and Submit Invoices for Multi-Line POs

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