

Job Aid – How to Create an Invoice via Supplier Actionable Notification (SAN)– Coupa Tool

How to Create an Invoice via Supplier Actionable Notification (SAN)

In this job aid:

✓ **How create an Invoice via Supplier Actionable Notification (SAN)**

This guide demonstrates how to create an invoice from a Coupa Purchase Order (PO) via Supplier Actionable Notification (SAN).

Creating an Invoice via SAN Overview

- All invoices in Coupa must be created and backed by a Purchase Order.
- Once a PO has been created, an emailed notification will be sent to the PO email on file which allows suppliers to receive/acknowledge POs and invoice against POs via the Coupa Supplier Actionable Notification (SAN).

Process – Reviewing your Coupa Purchase Order

1. Upon the successful creation of Coupa POs, supplier’s will receive an email notifying them that a Purchase Order has been issued.

DaVita Inc - DEV ENV Purchase Order #DVA-00291894 Inbox x

Kenny Boozer <do_not_reply@davita-dev.coupahost.com>
to me ▾

10:06 PM (1 minute ago)

Powered by Coupa



DaVita Inc - DEV ENV Purchase Order #DVA-00291894

Order Summary

Date 12/22/22
PO Total 20.00 USD
Shipping Terms Ground
Contact Kenny Boozer
118117.staging.test@coupa.com

[Manage Order](#)

[Create Invoice](#)

Orders details below

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Process – Reviewing your Coupa Purchase Order

2. Selecting “Manage Order” will allow you to review important Purchase Order information:

Note: If you do not need to review the provided Purchase Order, you can simply press “Create Invoice” in the previous window. (*proceed to slide 4*)

- PO Number
- Status of the PO
- Order Date
- Revision Date (if applicable)
- Requester’s name
- Requester’s e-mail
- Payment Terms
- Attachments

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

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

Sort by

Line Number: 0 → 9

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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. If you agree with all aspects of this order, select “Create Invoice”. If not, please see our job aid titled “How to Reject a Coupa Purchase Order”.

The screenshot displays the 'Lines' section of a Coupa purchase order. It features a table with two line items. Line 1 is for 'General Cleaning Services 2022-2023' with a price of 1,200.00 and a total of 1,200.00. Line 2 is for 'Buffing' with a price of 500.00 and a total of 500.00. The 'Invoiced' amount for both lines is 0.00. A summary row at the bottom shows a total of 1,700.00 USD. At the bottom right, there are buttons for 'Create Invoice', 'Save', and 'Print View'. Numbered callouts (4-8) are placed over the interface to guide the user through the review process.

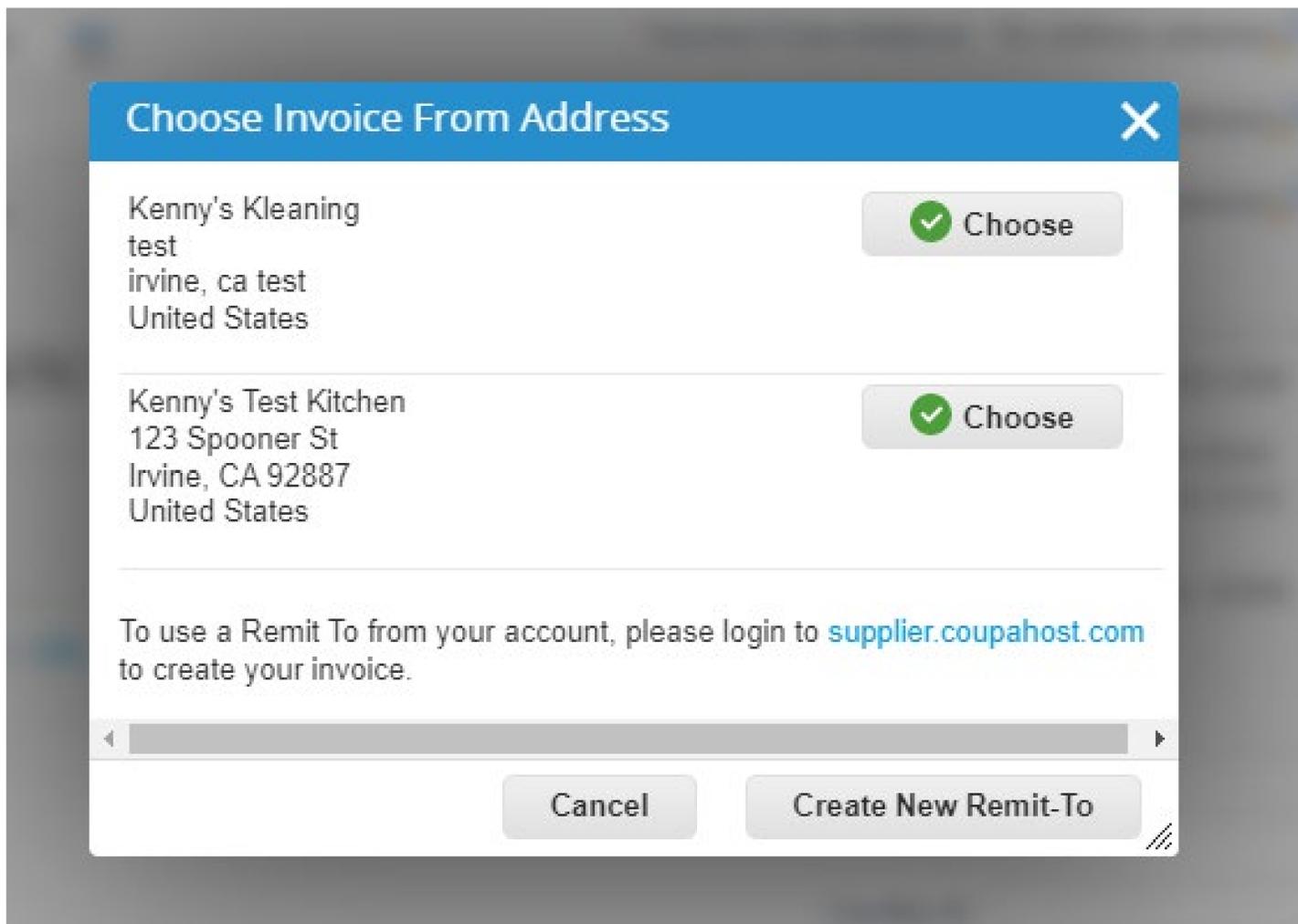
Line	Type	Item	Price	Total	Invoiced
1	Service	General Cleaning Services 2022-2023	1,200.00	1,200.00	0.00
2	Service	Buffing	500.00	500.00	0.00
			Total USD	1,700.00	

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1. Once you select “Create Invoice”, you will be prompted to select you Remit-To (Invoice From) Address. If the correct address is not displayed, please select “Create New Remit-To”.



2. Once a Remit-To address is selected, you will need to manually add some information in the General Info Section:

- Invoice Number (mandatory)
 - Must be unique. Do not reuse Invoice Numbers
- Invoice Date (mandatory)
 - This field does auto-populate with the current date. If you are invoicing after the proper invoice date, please back date accordingly.
- Invoice Image Scan (optional, preferred)
- Supplier Note (optional)
- Attachments (optional)

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3. If applicable, manually add information to the To section:

- PO Reference (optional)
- Facility ID (optional)
- Customer Account Number (optional)

To

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

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

5. By default, Coupa will include lines for all items listed on the PO. If a PO contains multiple lines, one can invoice specific line(s) on the PO by removing all other lines from the invoice before submitting (use the red X contained in each line to delete).

Lines Line Level Taxation

Type	Description	Price	
	General Cleaning Serv	1,200.00	1,200.00 ✕

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

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Process - Submit Invoices to DaVita for Review and Payment

1. Manually add information to the Totals & Taxes section (if applicable).
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.

Export to		View		Search				
5	Invoice #	Created Date	Status 6	PO # 7	Total	Unanswered Comments	Dispute Reason	Actions
	TEST - 123456	09/15/22	Processing	DVA-00204003	1,200.00 USD	No		

Invoice 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. The invoice can be edited and resubmitted, OR a credit note must be created to fully offset the invoice and a new invoice must be submitted.
Voided	Invoice has been voided and will not be processed for payment. Check comment section at the bottom of the invoice for void reason.