

## Job Aid – Supplier: PO Backed Coupa Bulk Upload File – Coupa Tool

### PO Backed Coupa Bulk Upload File

#### Populate the PO Backed Coupa Bulk Upload File – Invoice Header

1. A PO Backed Coupa Bulk Upload File allows you to create and submit multiple invoices to DaVita at one time via a CSV template.
2. General File Structure
  - a) Row 1 = Invoice Header Fields – information that applies to the entire invoice (e.g., date, tax amount, control total, remit to code)
  - b) Row 2 = Invoice Line Fields – line level invoice information (e.g., line number, price, PO Number, PO Line Number)
3. Open your PO Backed Coupa Bulk Upload File template
4. Ensure Row 3, Column A begins with “Invoice” to distinguish it as the first invoice header
  - a) Invoice lines below will reference this row as the invoice header
5. Identify a unique “Invoice Number” in column B
6. Apply the “Invoice Date” for when services were performed. “Invoice Date” marks beginning of payment window per agreed upon Payment Terms
7. If applicable, update the following fields with their appropriate charges:
  - a) Misc. Amount
  - b) Shipping Amount
  - c) Handling Amount
  - d) Tax Amount
8. Add any additional notes you’d like to send to DaVita in the “Supplier Notes” field
9. Summarize line totals, misc. amount, shipping amount, handling amount, and taxes
10. Apply total of “9” in the “Invoice Control Total” field
11. DO NOT CHANGE THE VALUES IN THESE FIELDS: “Supplier Name”, “Supplier Number”, “Status”, “Submit for Approval”, “Line Level Taxation”, “Tax Rate”, “Tax Code”, “Tax Rate Type”, “Remit To Code”

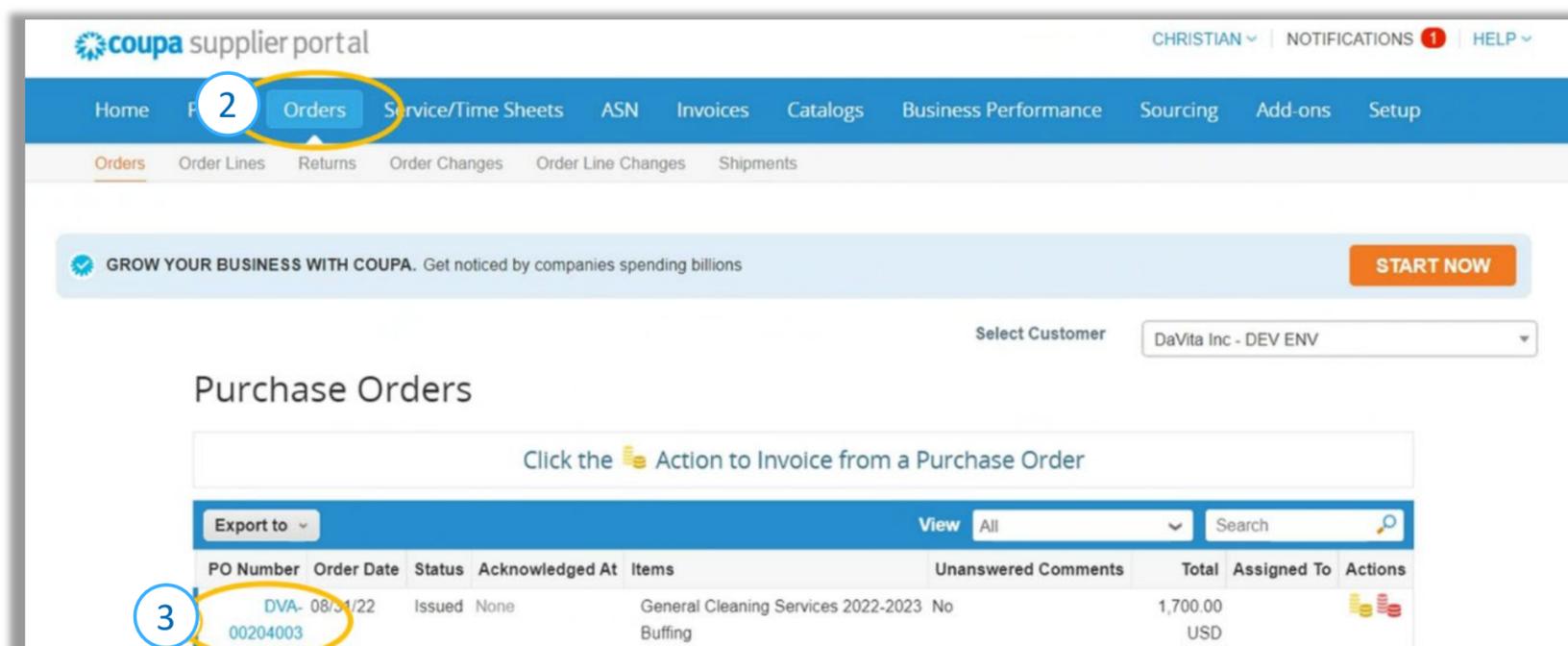
Invoice	Invoice Number*	Supplier Name	Supplier Number	Status	Invoice Date*	Submit for Approval	Misc Amount	Shipping Amount	Handling Amount	Line level Taxation*	Tax Amount	Tax Rate	Tax Code	Tax Rate Type	Supplier Note	Invoice Control Total	Remit To Code
Invoice Line	Invoice Number*	Supplier Name	Supplier Number	Line Num	Description*	Price*	Quantity	Unit of Measure	PO Number	PO Line Number							
Invoice	234234987	Janitorial Services	325319			44804 Yes				N	0						4802851

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### PO Backed Coupa Bulk Upload File

#### Access the Purchase Order

1. Login to your Coupa Supplier Portal account at <https://supplier.coupa.com/home/>
2. Click “Orders” and locate the purchase order(s) you are invoicing against
3. Click on the “PO Number” hyperlink to open the PO and view line level details



#### Populate the PO Backed Coupa Bulk Upload File – Invoice Line(s)

1. After populating Row 3 to indicate a new invoice, update Rows 4 on based on the number of lines you need to create for this invoice (e.g., if only creating one line, only populate one row)
2. Ensure column A for this applicable row states “Invoice Line”
3. Copy the “Invoice Number” from the invoice header and apply to this line
4. Enter 1 for “Line Number” (Any rows below this would follow sequentially as 2, 3, 4, etc.)
5. Enter a “Description” for what you are invoicing DaVita for (e.g., Cleaning Services for August ‘22)
6. Enter a “Price” for the amount of this invoice line
7. If the purchase order contains a “Quantity” field, input the applicable quantity for this invoice line (e.g., If PO says 1, enter 1 on the invoice line)
  - a) If there is no “Quantity” on the purchase order, DO NOT enter a “Quantity”
  - b) If you see dollar signs on the purchase order, DO NOT enter a “Quantity”
8. If the purchase order contains a “Unit of Measure”, copy that “Unit of Measure” onto the invoice line
  - a) If there is no “Unit of Measure” on the purchase order, DO NOT enter a “Unit of Measure”
  - b) If you see dollar signs on the purchase order, DO NOT enter a “Unit of Measure”

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#### Populate the PO Backed Coupa Bulk Upload File – Invoice Line(s)

9. Copy the “PO Number” from the Purchase Order Header and apply to the invoice line

9

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** christian.a.harris@accenture.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

10. Copy the “PO Line Number” in which this invoice line is invoicing against and enter in “PO Line Number” field

**Lines**

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Price	Total	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
	<b>2</b>	<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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Total USD 1,700.00

11. DO NOT CHANGE THE VALUES IN THESE FIELDS: “Supplier Name,” “Supplier Number”

Invoice	Invoice Number*	Supplier Name	Supplier Number	Status	Invoice Date*	Submit for Approval	Misc Amount	Shipping Amount	Handling Amount	Line level Taxation*
Invoice Line	Invoice Number*	Supplier Name	Supplier Number	Line Num	Description*	Price*	Quantity	Unit of Measure	PO Number	PO Line Number
Invoice	234234987	Janitorial Services	325319			44804	Yes			N
Invoice Line	234234987	Janitorial Services	325319	1	Monthly Cleaning - Facility 1	1200			DVA - 234923487	1

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### PO Backed Coupa Bulk Upload File

#### Adding Multiple Invoices to the PO Backed Coupa Bulk Upload File

1. To add multiple invoices to one PO Backed Bulk Upload File please follow this structure:
  - a) Invoice Header 1
    1. Invoice Line 1
    2. Invoice Line 2
    3. Invoice Line 3
  - b) Invoice Header 2
    1. Invoice Line 1
    2. Invoice Line 2
    3. Invoice Line 3
2. REMEMBER: Copy the following static values to their applicable lines to decrease processing errors for payment:
  - a) Invoice Header: “Supplier Name”, “Supplier Number”, “Submit for Approval”, “Line level Taxation”, “Remit To Code”
  - b) Invoice Line(s): “Supplier Name”, “Supplier Number”
3. Here is a screenshot of what this would look like within the CSV file:

Invoice Header Fields	Invoice	Invoice Number*	Supplier Name	Supplier Number	Status	Invoice Date*	Submit for Approval	Misc Amount	Shipping Amount	Handling Amount	Line level Taxation*
Invoice Line Fields	Invoice Line	Invoice Number*	Supplier Name	Supplier Number	Line Num	Description*	Price*	Quantity	Unit of Measure	PO Number	PO Line Number
Invoice 1	Invoice	234234987	Janitorial Services	325319		8/31/2022	Yes				N
	Invoice Line	234234987	Janitorial Services	325319	1	Monthly Cleaning - Facility 1		1200		DVA - 234923487	1
	Invoice Line	234234987	Janitorial Services	325319	2	Buffing - Facility 1		500		DVA - 234923487	2
	Invoice Line	234234987	Janitorial Services	325319	3	Window Cleaning - Facility 1		500		DVA - 234923487	3
Invoice 2	Invoice	2358348	Janitorial Services	325319		9/1/2022	Yes				N
	Invoice Line	2358348	Janitorial Services	325319	1	Monthly Cleaning - Facility 2		1200		DVA - 2349234879	1
	Invoice Line	2358348	Janitorial Services	325319	2	Buffing - Facility 2		500		DVA - 2349234879	2
	Invoice Line	2358348	Janitorial Services	325319	3	Window Cleaning - Facility 2		500		DVA - 2349234879	3

#### Submit the PO Backed Coupa Bulk Upload File to DaVita

1. Save the PO Backed Coupa Bulk Upload File to your desktop.
2. Email Coupa Bulk Upload File to [APUploads@davita.com](mailto:APUploads@davita.com)

**Note:** After submission, should any errors occur within the upload file, Accounts Payable will return the file via email with detailed instructions regarding what needs to be corrected.

#### Troubleshoot Invoices with No Coupa PO

Should a Coupa PO not be provided, please partner with the DaVita teammate(s) in which you provide services to. They will be able to create a Coupa Requisition which will auto-generate a Coupa PO upon approval.

**Note:** In the event that a Coupa PO is unobtainable, please submit invoices directly to [APIInvoicesOnly@davita.com](mailto:APIInvoicesOnly@davita.com).