Invoices

Contents

General information

E-invoicing, or "electronic invoicing," refers to the process of sending and receiving invoices in a digital format instead of a traditional paper-based format. E-invoicing aims to streamline the invoicing process and to facilitate faster and more accurate financial transactions between suppliers. E-invoicing can offer several benefits, including cost savings, removal of supplier bottlenecks, faster payment processing, reduced fraudulent activity, improved visibility, and compliance with regulatory requirements.

Coupa´s E-invoicing solution, give suppliers of all sizes a variety of options for cloud invoicing — all without fees across PO-backed and contract-backed.

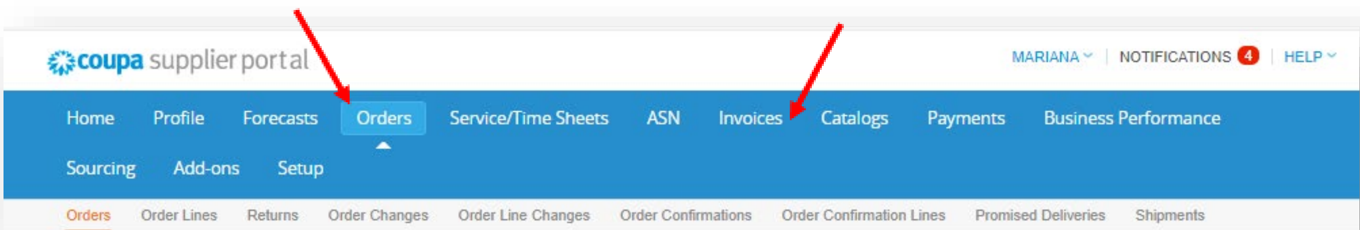
Create invoices directly from purchase orders on the Coupa Supplier Portal for free, this is the most comprehensive way to manage your interactions within Coupa.

Create an invoice or a credit note

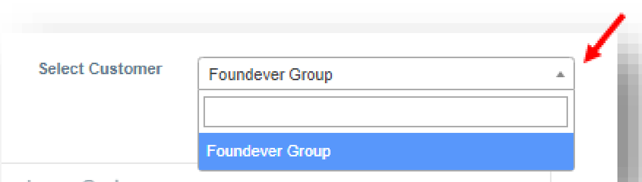
Create an invoice from a PO

To create an invoice from a PO please follow below steps:

Step 1: Go to the **Orders** page or, on the **Invoices** page, click on the **Create Invoice from PO** button above the table to go to the Orders page.

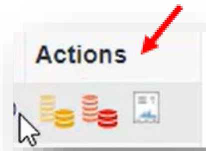


Step 2: From the **Select Customer** drop-down list in the top right corner, select Foundever Group

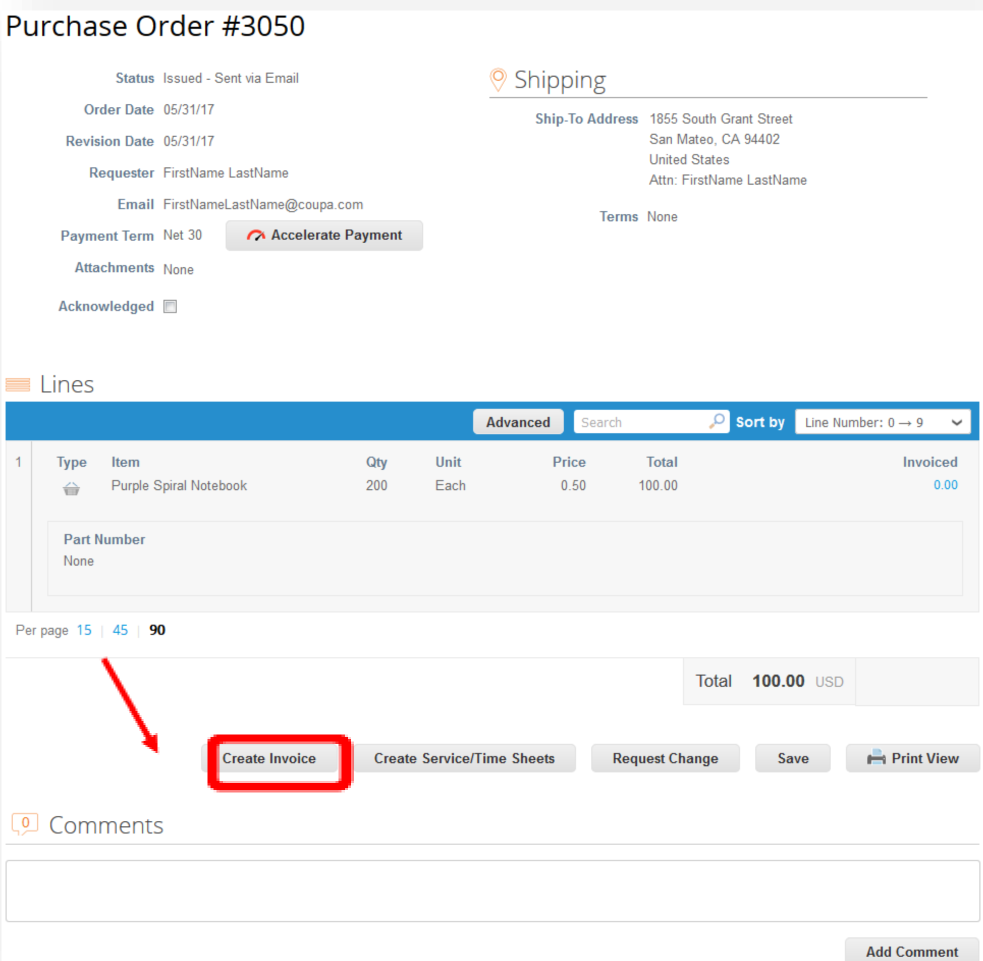


Step 3: On the Orders page, do one of the following:

a. Click on the **Create Invoice Gold_Coins.png icon** for the PO in the Actions column of the Purchase Orders table.



b. Click on the **PO Number link** to open the purchase order and click on the **Create Invoice button**.



Step 4: Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address

Step 5: On the Create Invoice page, fill Invoice header fields (mandatory fields are marked with a red asterisk (*)) in your invoice. Some of the fields are pre-populated with information from the PO.

Attach a file of the invoice by clicking Choose File in the Attachments field. Acceptable file types include PNG, GIF, JPG, JPEG, PJPEG, TIFF, and PDF.

Step 6: You will now enter the amount to be invoiced - either in the Price field (for services) or in the Qty field if for goods (unit price will be needed to be provided as well). Please also include any relevant tax and transportation charge.

Note: The value will auto-populate with the current PO balance available for invoicing. It is important to only invoice for actual goods shipped or services rendered so please update accordingly.

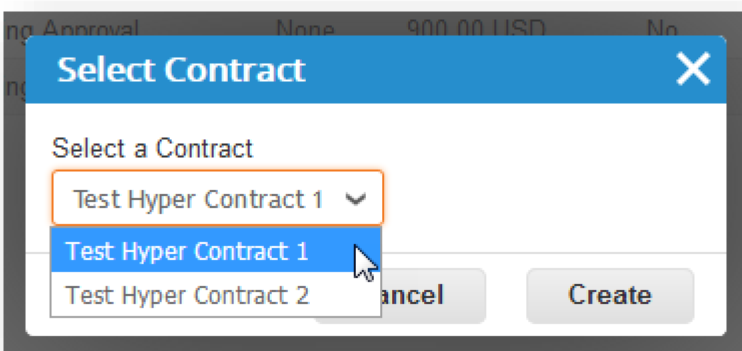
Step 7: Click **Calculate** which will update the Total amount due. Updates will be reflected on each line and additional charges will populate.

Step 8: When you are ready to send, click **Submit**.

Create an invoice from a contract

In some specific cases – considered as exemption of the No PO no pay policy - Foundever Procurement team will enable the option to invoice directly against a contract (without requiring a purchase order PO) in your supplier profile. To invoice under this scenario please follow below steps:

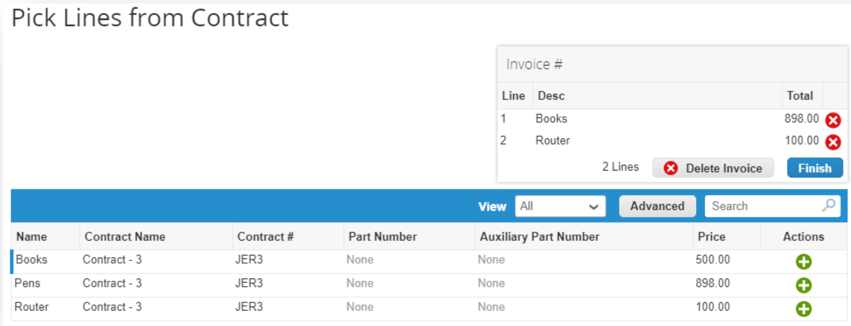
Step 1: Click on the **Create Invoice from Contract** button above the Invoices table on the **Invoices** page and select the relevant contract from the dropdown list.



Step 2: Create a new or choose an existing invoice-from address.

Step 3: On the Create Invoice page, fill Invoice header fields (mandatory fields are marked with a red asterisk (*)).

Step 4: Under the **Lines** section, click on **Pick lines** and choose the lines you want to add on the Pick Lines from Contract page and click **Finish**.



Tip: If you lose visibility on the invoice return to the Invoice tab where you will visualize the invoice, then click on the pencil to continue editing the invoice.

Step 5: Once you finish editing the invoice, click **Submit**.

Create a credit note

You can issue a credit note to:

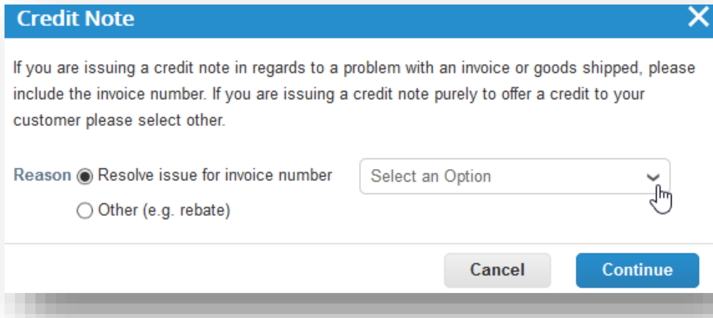
- Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice.
- Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

Note: A credit note can only be created for invoices in Disputed or Approved status.

To create a credit note:

Step 1: Click on the **Create Credit Note** button above the Invoices table on the **Invoices** page or, on the **Orders** page, click on the **Create Credit Note Red_Coins.png** icon for the PO in the Actions column of the Purchase Orders table.

In the appearing Credit Note popup, select the **reason** for your credit note.



a. Resolve a dispute: If the credit note is related to a problem with an invoice or the goods shipped, select the **Resolve issue** for invoice number radio button and, from the dropdown list, select the invoice number. Click **Continue** to select how you want to resolve the issue.

You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it.

Note: Only quantity or price can be reduced through partial credit notes.

b. Record a credit: Select **Other** and click **Continue**. If a contract is available, you can also select it from the dropdown list.

Create the credit note similarly to creating an invoice.

If you completely cancel the invoice, you can edit the following fields: Credit Note Number, Credit Note Date, Supplier Note, and Discount Amount. You can also add attachments (file, URL, or text) and an Image Scan, and modify PO lines, the UNSPSC, and tax reason descriptions. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.

If you adjust the invoice, you can also edit the price or quantity. Line level taxes are carried over from the invoice and are prorated based on the credit amount.

Note: Header level charges (for example, shipping, handling, miscellaneous, or header level tax) are not brought over from the original invoice. To provide a credit for header level charges, you need to submit a separate stand-alone credit note.

If you selected Other, you are asked to create a new or choose an existing invoice-from address before editing the invoice.

Refer to [Coupa´s Create or Edit an Invoice guide] to access more details and task based videos on this topic.

View and manage payments

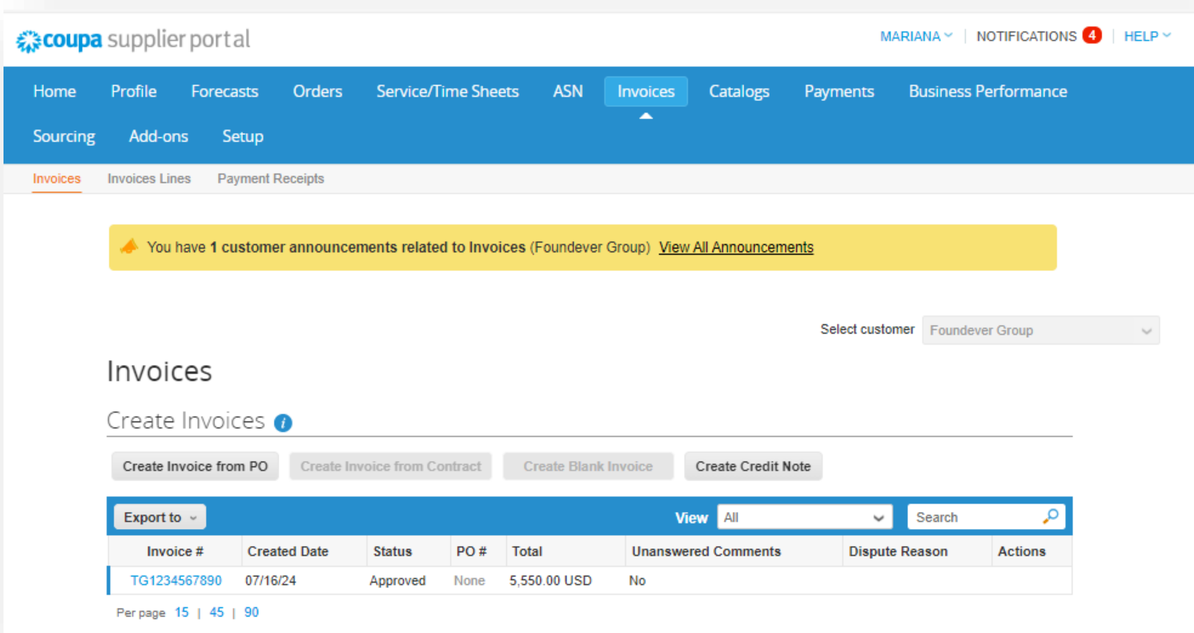
The Coupa Supplier Portal allows you to see a complete overview of your payments from Coupa customers. Depending on what is more efficient for your team, you have the option of viewing invoice payments by remittance number or by invoice number.
From the Payments page, use the Select Customer dropdown menu to choose Foundever Group.

Invoice Payments

Coupa allows you to visualize payment status via the CSP.

The Payments table for Invoice Payments has two built-in views: Remittance by Payment # and Remittance by Invoice #. The chosen view type determines the sorting method in the far-left column and payments are sorted in either ascending or descending order.

Step 1: Go to the **Invoices** page, click on the **Payments Receipts** tab.



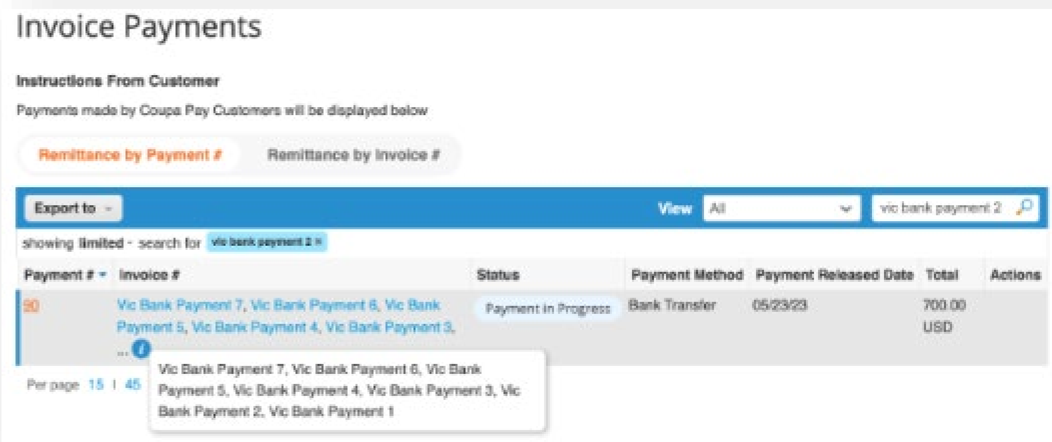
Find below the list of fields that will be shown:

- **Invoice #:** The table shows up to the first 5 invoices associated with each payment. If there are more than 5 invoices associated with a payment, you see an information icon. Hover over it to see all invoices associated with that payment.
- **Created Date:** Invoice created date.
- **Status:** This shows invoice payment status.
- **PO #:** Purchase Order (PO) number related to each specific invoice
- **Total:** This is the total value of the payment and applicable currency

- **Unanswered Comments:** Section to show if any comment is awaiting answer.
- **Dispute Reason:** Applicable only to disputed invoices, if applicable will show Foundever´s comments behind the reason for taking this action.
- **Actions:** If there are any actions available relating to the payment, you can see them in this column.

Step 2: If needed, you can search by invoice

If you have a lot of payments, or if your payments tend to each have many associated invoices, it can be hard to find the payments relating to any one specific invoice. Rather than having to scroll through your Payments table, you can simply search by invoice. Go to the **Search bar** at the top right of your table and enter the invoice. This bring up the payment for that invoice.



Step 3: Understanding invoice status

On the Invoices tab, you can view Invoices that have been submitted through Coupa Supplier Portal. The Status column will show you the status of the invoice.

Note: Be sure to select the appropriate Customer

Invoice Status and Description:

Invoice Status	Description
Approved	The invoice has been accepted for payment by Foundever
Disputed	The invoice has been disputed
Draft	The invoice has been created, but it has not been submitted to Foundever yet
Pending Approval	The invoice is currently under review by Foundever
Processing	The invoice is being processed by the AP department and should be paid soon
Voided	Something is wrong with the invoice and Foundever had to Void the invoice

Step 4: Understanding payment status

The status of each payment shows you where that payment is within its overall lifecycle, below applicable status for payments completed via Bank Transfer.

Payment Method	Payment in Progress	Completed Successfully	Failed
Bank Transfer	Your customer has sent you a bank payment. It may take up to 2-3 business days for you to receive this in your account.	Your payment has been delivered and you should see it in your bank account within 1 business day.	There has been a problem with your payment, please contact your customer.

To view further details about a specific invoice, click on the Invoice # in blue

Note: Because the lifecycle of a payment varies by payment method, the same status for two different payments may not indicate the same thing.

Invoice FAQs

1. **What options are available for me to submit invoices to Foundever?**
   Below listed methods are available for submitting invoices:
   - Via CSP, where you sign in to manually flip a PO to create an invoice. Preferred method.
   - Supplier Actionable Notifications (SAN), where you act on an email without logging in to the CSP.
   - Via email as traditionally done.

2. **How do I know if an invoice has been registered?**
   On the main menu, click on the **Invoices** tab. Select Foundever Group as customer, look for invoices that are still listed as drafts, those need to be edited and then submitted. If the invoice is not there, it's not in the system.

3. **How do I add shipping charges to an invoice?**
   You can add shipping charges at the bottom of the invoice or at the line item level.

4. **How do I credit or cancel an invoice that's already been billed?**
   To create a credit, enter a negative quantity. For more information, see Create or Edit an Invoice and refer to the Create a credit note section.
   Once an invoice is submitted, it can't be changed in any way. For more information, see Create or Edit an Invoice.

5. **How do I make a part claim on an invoice?**
   You can invoice multiple times against a single PO. Just click the gold coin icon and enter the amount you'd like to appear on the invoice.

6. **Why can't I edit, void, or delete an invoice?**
   Once an invoice has been submitted, and Foundever has process it it can't be changed in any way. This ensures invoice processing integrity. However, you still have options:
   Ask your customer to reject or void the existing invoice. You can then create a new one.
   Create a new credit memo that credits the customer for the original value, and then create a new invoice.
   If the invoice has not been processed by Foundever you will be able to recall the specific invoice and edit it as needed.

7. **What does the status "Tolerance Hold" on an invoice mean?**
   It means your invoiced amount differs from the PO by more than allowed parameters without manual approval. If an invoice has been on hold for a while, please contact your Foundever representative and ask to review it.

8. **What do I do if an invoice was rejected?**
   Just create a new invoice to replace the one that was rejected.

9. **Once an invoice has been approved, what do I need to do next?**

Nothing. The invoice is in Foundever´s queue and you'll be paid based on the agreed payment terms.

10. **What if I have an invoice that hasn't been paid?**
    For questions regarding payment information, contact Foundever´s Accounts Payable directly. In your notification settings you can choose to receive payment notifications via email or short text message (SMS).

11. **Do I need to see a purchase order on the CSP before I can invoice my customer?**
    You can submit invoices either link to a PO or to a contract, you should not submit non-PO backed invoices.

12. **How do I create an invoice that isn't backed by a purchase order?**
    You will be able to submit invoiced backed by a purchase order or a contract, non-backed invoices are not allowed.

13. **What does the Export to button do?**
    You can export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (.zip) file.
    By default, the maximum number of rows that you can export is 200,000. If you try to export a larger table, you receive an error message stating that only 200,000 rows are exported.

    Note: There is no limitation on the number of invoices or file size when exporting legal invoices. For the best performance, it is recommended not to export more than 1,000 invoices at a time.

    When you export a table with less than 500 rows, the file downloads to your computer immediately. When a table has more than 500 rows, you receive the exported file zipped in an email.

14. **How do I create a credit memo?**
    Log in to the CSP and click on the Orders tab on the main menu. Choose the PO you'd like to create a credit for and select the red coins. You'll create a negative invoice with either a negative quantity or a negative amount.

15. **Why do I get the "VAT ID format incorrect" error?**
    You need to add GB or ABN in front of the VAT number for British or Australian suppliers/invoices. On the main menu, click on the Admin tab to add a legal entity with the correct VAT ID under Legal Entity Setup.

16. **What do I do if I get the "Please fix the below error" message?**
    Something is wrong on the Foundever's end. Ask your Foundever representative to request to check their Coupa instance to see if there is any custom mandate field which can't be viewed on your side or if the billing account is active.

17. **What types of files can I attach to an invoice?**
    For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

18. **How long are legal invoices available for download?**
Invoices in the CSP are available for you to download as long as you are connected to Foundever through the CSP. You can also develop an internal process for downloading and storing these invoices in a separate electronic archive of your choice.

19. **What does "pending receipt" mean?**
This status shows that Foundever´s requester is in the process of receiving the goods/services into their system. Once the receipt is completed, the invoice is matched against it.