



Pearson

Providing a Pearson Compliant Invoice: UK, U.S.A. and Canada

Welcome to the Pearson Compliant Invoicing Guidance

This document is designed to help you create a compliant invoice.

September 2020



Minimum Requirements For A Pearson Compliant Invoice:

1

Pearson is committed to paying Suppliers within the agreed payment term from the date on which a **'valid'** invoice enters the Pearson payment system. To ensure this happens, it's important that Suppliers understand Pearson's requirements for a compliant invoice.

Why are these requirements needed?

There is a minimum amount of information Pearson requires from a supplier in order to execute a payment; we need to understand what we are paying for and that the appropriate Tax information is provided.

Additional guidance is also available on Pearson's Supplier website which is viewable on the Pearson Plc website pages:

<https://www.pearson.com/for-suppliers.html>



PLEASE NOTE

Failure to provide a compliant invoice will result in your invoice **being rejected** back to you for correction.

This will cause a delay in your payment

A **'valid'** invoice is defined as one that contains the following information:

- **Supplier company name, address and contact information.**
- Include a **remit-to** address.
- A valid **Pearson Purchase Order Number**. Invoice line items should match the Purchase Order description (if a Purchase Order has been issued)
- The correct **Pearson contact name**. *Invoices are routed to the named Pearson contact for approval. Entering an incorrect Pearson contact name on the invoice will route the invoice to that individual for approval and cause significant delay in payment or rejection back to you.*
- The **Pearson legal entity and address** of the contact who is contracted to receive the goods or services.
- The word: **"Invoice"** or **"Credit"** as appropriate.
- Either an **Invoice number** or **Credit number**, as appropriate. *Invoice and credit numbers should not exceed 30 characters or include any special characters.*
- **Invoice date.**

For UK Suppliers

- **VAT amount** applicable (expressed in sterling).
- **VAT registration number** if you are registered

For US/Canadian Suppliers

- **Sales Tax amount** as applicable.
- **Federal Tax Identification Number** if you are registered. Please do not provide your Social Security number on this document.
- **Full description** of the **good(s)** or **service(s)** supplied.
- **Date** the **good(s)** or **service(s)** were **provided (supply date)**.
- **Total Invoice amount** due.

All information must be easily intelligible on the invoice. Any text printed over text will not pass through our stringent system checks

2

Sample Invoice created using a Microsoft Word invoice template. Remember your invoice must be submitted to Pearson in PDF format

Invoice

Supplier name:
 Supplier Address:
 Federal Tax ID: (if applicable)
 Supplier Contact:

Invoice to: Pearson [Add Pearson address as it appears on the PO]
 Attention of: [Pearson Requestor Name]

PO Number:		Invoice Number:	
Delivery Date:		Invoice Date:	
		Total Invoice Amount:	
		Currency:	

Line Item #	Description of Goods/Services	Quantity	Rate (\$)	Amount (\$)
1	<i>(provide a detailed description of goods or services provided)</i>	10	\$5.00	\$50.00
2	<i>(provide a detailed description of goods or services provided)</i>	10	\$10.00	\$100.00
			Subtotal:	\$150.00
			Sales Tax:	\$9.00
			Total Due:	\$159.00

Remit Payment Via: [Provide your banking details]

Thank you for your business!

3

A few key things to remember, when submitting your invoices to Pearson via Coupa

**You have 2 ways to submit an invoice to Pearson via Coupa**

You can submit via **Supplier Actionable Notification** – using the “**Create Invoice**” button on your electronic PO. More information on this can be found at https://youtu.be/_6PqwX-jRyU

You can submit via the **Coupa Supplier Portal**

More information on this can be found at <https://youtu.be/fgqZg1gFfH4>

**You can only attach one invoice per submission in Coupa**

Do not attach multiple invoices to your submission in Coupa. The invoice you are creating in Coupa should match the invoice you are attaching and should have the **same invoice number**.



Do not attach any zipped files within Coupa.

Attachments should be in PDF format only.

**Pearson can only process your invoice from the date we physically receive it**

Your agreed payment terms will be initiated from the date that you submit your invoice to Pearson via Coupa. Not from the date on your actual invoice.



Pearson

