

How to submit an invoice using Coupa for Pearson Purchase Orders (PO Flip)



Pearson

Powered by  **coupa**

Slide notes

Welcome to How to Submit an Invoice using Coupa for Pearson Purchase Orders.

In this lesson you will learn how to flip your Pearson Purchase Order into an electronic Coupa Invoice via email notification or the Coupa Supplier Portal.

Slide notes

In this lesson, you will learn how to flip your Pearson Purchase Order into an electronic Coupa Invoice via your email notification or the Coupa Supplier Portal.

CREATE AN ELECTRONIC INVOICE USING COUPAFrom your email inbox

- 1) Open your email
- 2) Click the blue **Create Invoice** button
- 3) Fill in the Invoice Details
(partial and full amounts are accepted)
- 4) Check accuracy
- 5) **Attach** a copy of your actual invoice
(for VAT/tax and audit purposes)
- 6) Click **Submit**

From the Coupa Supplier Portal

- 1) Open your email
- 2) Click the blue View Order button
- 3) Logging into the CSP and click **Orders**
- 4) Create Invoice by clicking on the gold stack of coins
- 5) Fill in Invoice Details
(partial and full amounts are accepted)
- 6) Check accuracy
- 7) **Attach** a copy of your actual invoice
(for VAT/tax and audit purposes)
- 8) Click **Submit**
- 9) Click **Invoices** to view your invoices' status as any time

Slide notes

To create an electronic invoice from your email inbox:

Open your email.

Click the blue Create Invoice button.

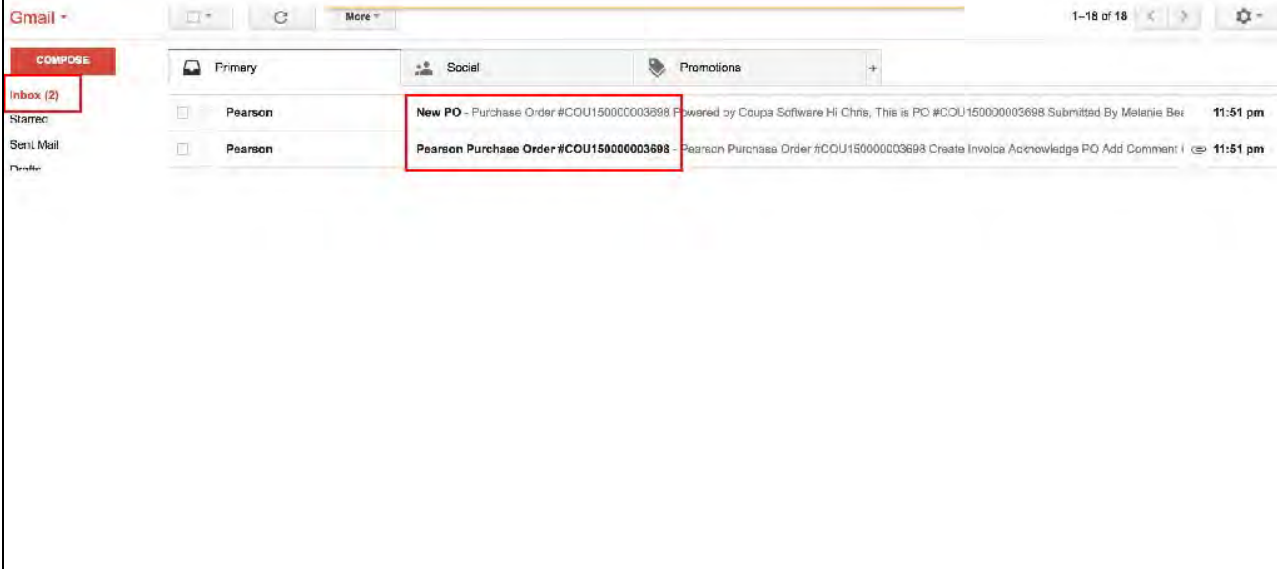
Fill in the Invoice Details (both partial and full amounts are accepted).

Check accuracy.

Attach a copy of your actual invoice (for VAT, tax, and audit purposes).

Click Submit.

You should have indicated during the onboarding process if you wanted to receive your Pearson Purchase Orders via email or the Coupa Supplier Portal.



Slide notes

Depending upon your choices during the setup of your supplier record during the onboarding process, you may have chosen to receive your purchase orders via email or through the Coupa Supplier Portal. In the email inbox displayed, two notifications have been received.

From this email you can create an invoice without accessing the Coupa Supplier Portal.

COMPOSE Pearson Purchase Order #COU110000007569 Inbox

Pearson <do_not_reply@pearson-dev.coupacloud.com> to me 12:07 AM (31 m nutes ago)

Pearson Purchase Order #COU110000007569

Create Invoice Acknowledge PO Add Comment

Pearson
Pearson PURCHASE ORDER
New Supplier Test 200
1 Lake Street
Upper Saddle River, NJ 07458
Attn: Chris A

PO NUMBER: COU110000007569
DATE: 23/03/2018
PAYMENT TERMS: Net 45 Days
CURRENCY: GBP
CONTRACT:

Gmail - 1-18 of 18

COMPOSE

Pearson Primary **Social** Promotions

Pearson **New PO** - Purchase Order #COU150000003898 Powered by Coupa. Software Hi Chris, This is PO #COU150000003898 Submitted By Melanie Bee 11:51 pm

Pearson **Pearson Purchase Order #COU150000003898** - Pearson Purchase Order #COU150000003898 Create Invoice Acknowledge PO Add Comment 11:51 pm

Slide notes

By clicking on the first email received, with the subject line "Pearson Purchase Order Number," you have the option to create the invoice without logging into the Coupa Supplier Portal. Click the blue Create Invoice button.

Create Invoice Create

If your Remit-to information has not been successfully completed, you will be prompted to do so before continuing with Invoice creation.

General Info

* Invoice # Enter a new address X

* Invoice Date

Payment Term

* Currency

Status

Image Scan

Supplier Note

* Attachments |

Company Information

Supplier

* Country

* Type of Company

Board of Directors

Address

Remit to name

* Line 1

Line 2

* City

County

* Post Code

Preferred Language

9999999

A
iver Street
in
IXW
Kingdom

A
iver Street
in
IXW
Kingdom

A
iver Street
in
IXW
Kingdom

Slide notes

If your remit-to information has not been successfully completed, you will be prompted to do so before continuing with invoice creation. Complete the required fields marked with a red asterisk for you company information such as country and type of company. Then, be sure to update the remit-to address fields.

Create Invoice Create

Enter a new address You will also have the opportunity to enter your Tax or VAT Registration and Banking Information as needed.

General Info

* Invoice # **Tax Registration**

* Invoice Date Tax Country

Payment Term VAT ID

* Currency Not For Cross-Border Invoices

Status **Banking Information**

Image Scan

Supplier Note

* Attachments

NOTE: Banking information is required for compliant invoicing when indicated (with a *). Otherwise, banking info here is not required and will remain private

Bank Name:

Beneficiary Name:

Bank Account Number:

Routing Number (ABA):

IBAN:

Sort Code:

SWIFT Code:

Slide notes

You will also have the opportunity to enter your Tax or VAT Registration and Banking Information as needed. Reminder: in addition to an account or IBAN number, a routing number or one of the following is required: Sort Code or SWIFT code. Click Create and Use to start creating your invoice.

Create Invoice Create

Invoice number cannot exceed 16 characters.

General Info

*** Invoice #**

*** Invoice Date** Calendar

Payment Term Net 10 Days

*** Currency**

Status Draft

Image Scan No file chosen

Supplier Note

*** Attachments** Add [File](#) | [URL](#) | [Text](#)

Attach a copy of your actual invoice for VAT/tax and audit purposes.

From

*** Supplier** Chris A

Supplier Tax ID GB999999999

*** Invoice From Address** Chris A
200 River Street
London
RG9 1XW
United Kingdom
Corporation

*** Remit-To Address** Chris A
200 River Street
London
RG9 1XW
United Kingdom

Bank Name: Lloyds

Beneficiary Name: Chris A

Bank Account Number: ***3987

Sort Code: **3456

*** Ship From Address** Chris A
200 River Street
London
RG9 1XW
United Kingdom

Complete the fields that have a red asterisk and be sure to attach a copy of your invoice.

Slide notes

A new window will appear with an outline of an invoice that looks just like your PO. Please enter some required information, marked with a red asterisk as follows:

Invoice Number (Note: the number cannot exceed 16 characters),

Invoice Date,

Currency,

and be sure to click on File to attach a copy of your invoice for VAT, tax, and audit purposes.

Your remit to address and banking details should already be completed as a result of the supplier onboarding process.

All P2P compliant invoices must include:

1. "INVOICE"
2. Invoice Number (not to exceed 16 characters)
3. Invoice Date
4. Invoice Amount
5. Line Item Number
6. Description of Goods or Services
7. Valid PO and/or Contract Number
8. Supplier Name
9. Remit-to Address (include banking information, if applicable)
10. Pearson Legal Entity and Address
11. PO Requestor / Contact Name
12. Suppliers must attach an original invoice (including VAT or tax registration number, if required)

Invoice

SAMPLE INVOICE ONLY

Vendor Name: Chris A.
Vendor Address:
 200 River Street
 RG9 1XW London
 United Kingdom

Invoice to: PEARSON, INC.
Attention: Christina Amato
 221 River St
 Hoboken, NJ 07030
 Business Group: USHE

PO Number:	COU150000003698	Invoice Number:	Test 123
Invoice Date:	1/1/2018	Total Invoice Amount:	500 GBP

Payment #	Line Item #	Task Description	Quantity	Rate (\$)	Amount (\$)
1 of X	1	copyediting	100	5	500
Total Due					500 GBP

Make all deposits payable to:

Remit to:
~~Bank Name: Lloyds~~
~~Beneficiary Name: Chris A~~
~~Bank Account Number: ****3987~~
~~Sort Code: **3456~~
 VAT ID: GB999999999

Slide notes

REMINDER: A compliant invoice must indicate that it is an "Invoice" (versus a "Credit Note"), and include the following: an invoice number - not exceeding 16 characters, an invoice date, amount, line item number, description of goods or services, valid PO and or contract number, the Supplier's name, remit to address including banking information, if applicable, Pearson legal entity and address, and the PO requestor's name. Suppliers must attach an original invoice with VAP or tax registration number if required.

The full quantity and amount display by default. Please adjust as needed and click Calculate.

To

Customer Pearson

* Ship To Address 75 Upgrade street
75 Upgrade street2
San Mateo, CA 11111
United States
Location Code: 605047

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	Total
copyediting		100	EACH	5.00	500.00

PO Line Contract Billing Supplier Part Number Commodity
COU15000003688-1 82016428-3.1.1-9000.7000.227105-21114-10403-720090 COPYEDIT

Add Tag

Add Line

Subtotal 500.00

Shipping

Tax Description (Shipping) 0.000

Tax Description 0.00 0.00

Total Tax 0.00

Total 500.00

Delete Cancel Save as draft Calculate Submit

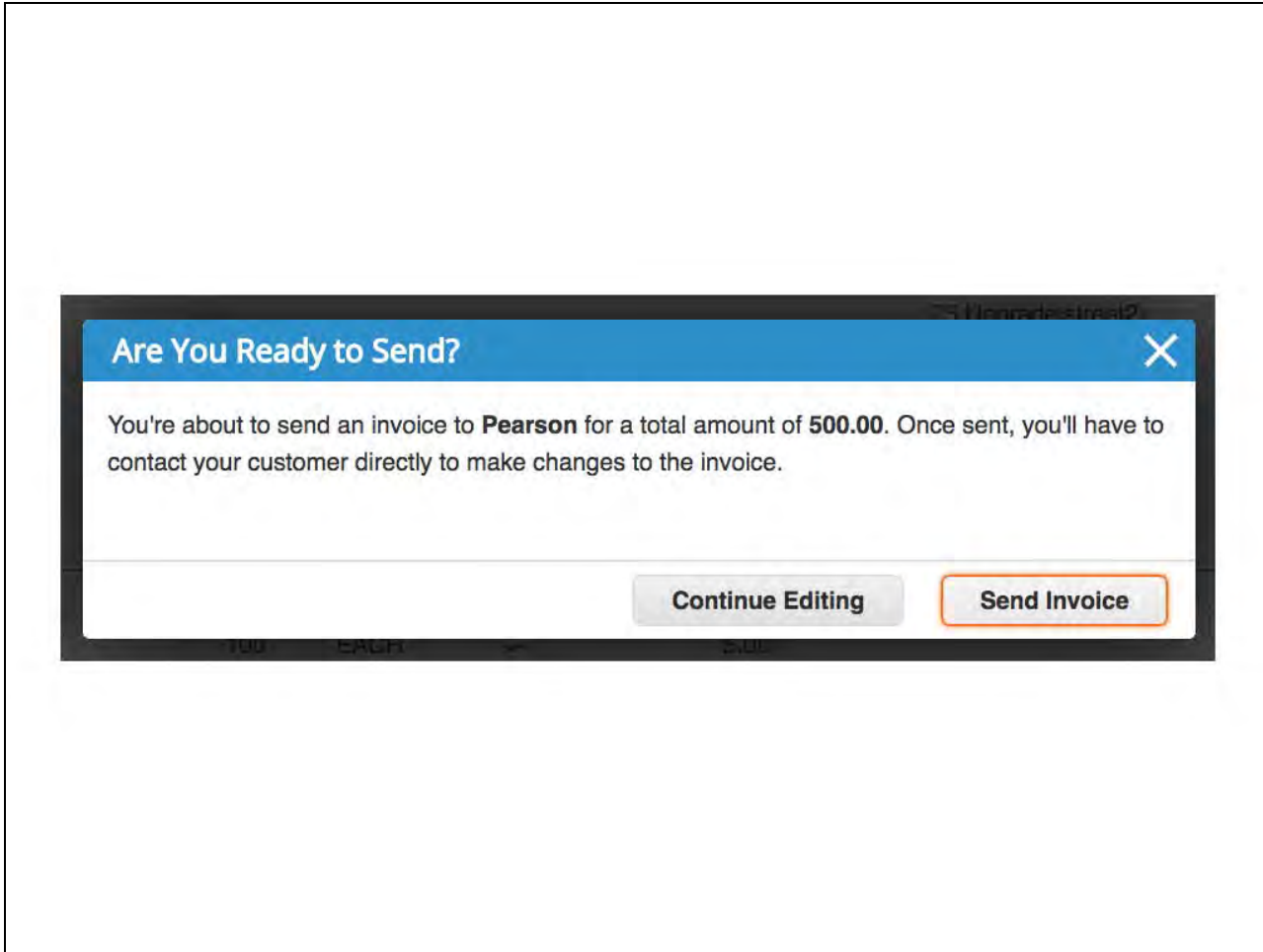
Feel free to add Comments, if applicable.

Comments

Add Comment

Slide notes

By default the full quantity, or amount, from your PO will be pre-populated in the invoice view. Please edit the quantity or amount to equal the goods and services that have been completed to date. If you have made any adjustments, be sure to click Calculate to update the Total amount due. Then, you'll be able to click Submit. Additionally, you are free to enter comments and click Add Comment.



Slide notes

A pop-up message will appear, asking you to confirm if you are ready to submit your invoice to Pearson or, if you need to Continue Editing it. Click Send Invoice to proceed.

This concludes the first option on how to use PO Flip directly from your email notifications. The next portion will guide you through similar steps using the Coupa Supplier Portal and its additional features.

Slide notes

This concludes the first option on how to use PO Flip directly from your email notifications. The next portion will guide you through similar steps using the Coupa Supplier Portal and its additional features.

CREATE AN ELECTRONIC INVOICE USING COUPAFrom your email inbox

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- 5) **Attach** a copy of your original invoice
(for VAT/tax and audit purposes)
- 6) Click **Submit**

From the Coupa Supplier Portal

- 1) Open your email
- 2) Click the blue **View Order** button
- 3) Logging into the CSP and click **Orders**
- 4) Create Invoice by clicking on the **gold** stack of coins
- 5) Fill in Invoice Details
(partial and full amounts are accepted)
- 6) Check accuracy
- 7) **Attach** a copy of your original invoice
(for VAT/tax and audit purposes)
- 8) Click **Submit**
- 9) Click **Invoices** to view your invoices' status as any time

Slide notes

To create an electronic invoice from the Coupa Supplier Portal: You can open the other email with the subject line New PO.

Click the blue View PO button to login to the CSP and click the Orders tab.

Create the invoice by clicking on the gold stack of coins.

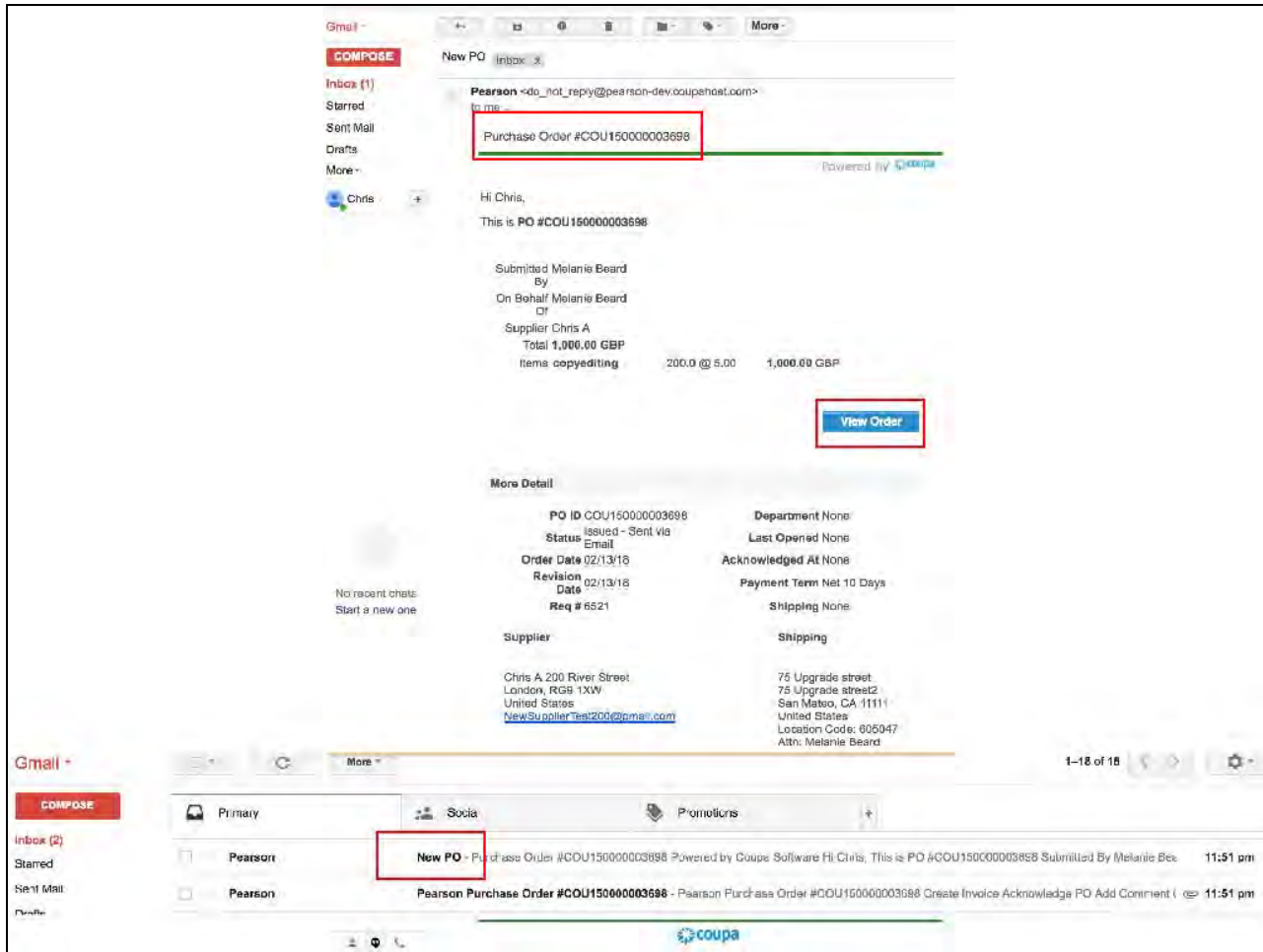
Fill in Invoice Details (both partial and full amounts are accepted).

Check Accuracy.

Attach a copy of your original invoice for VAT, tax, and audit purposes.

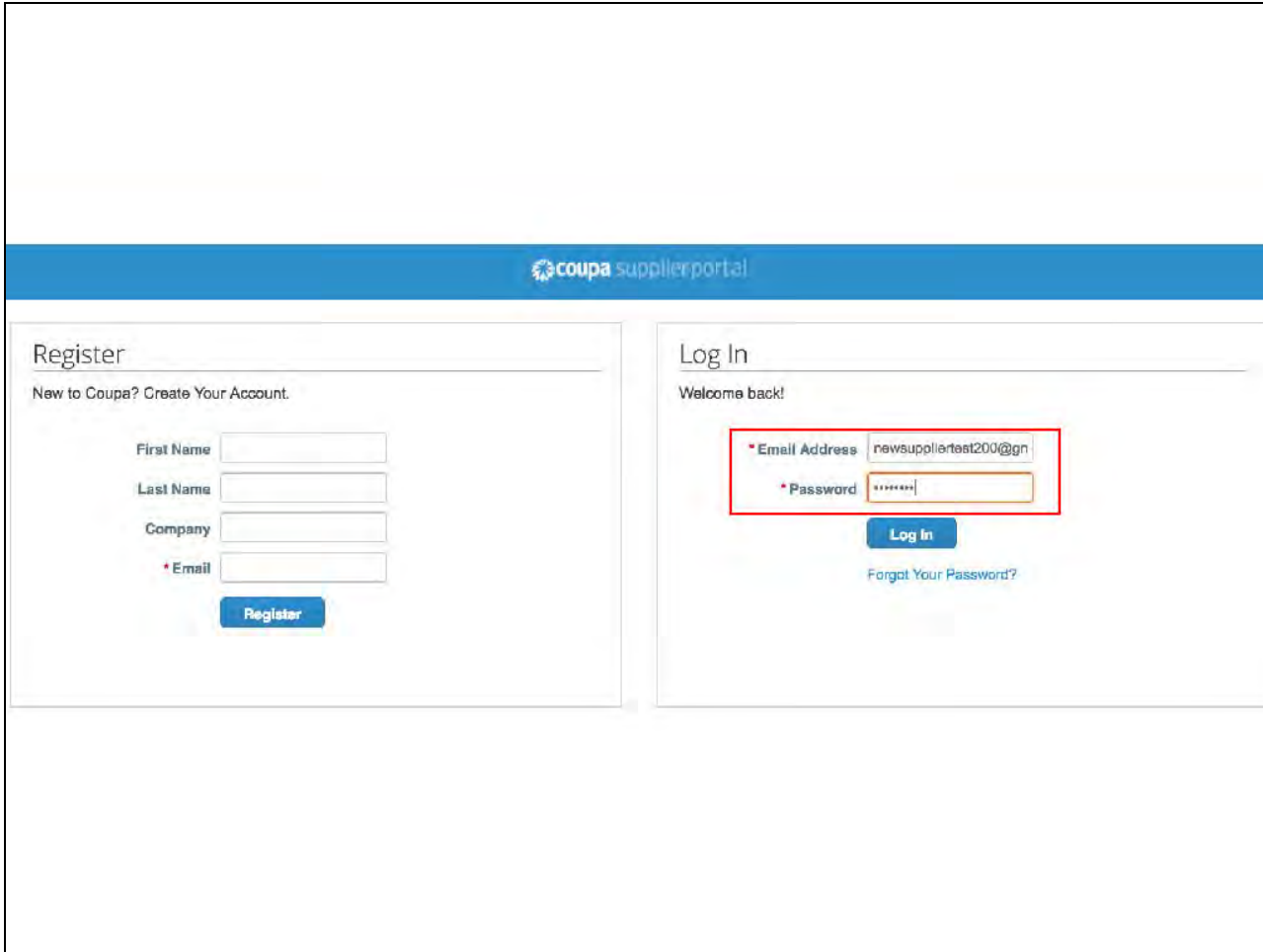
Click Submit.

Click the Invoices tab to view your invoices' status at any time.



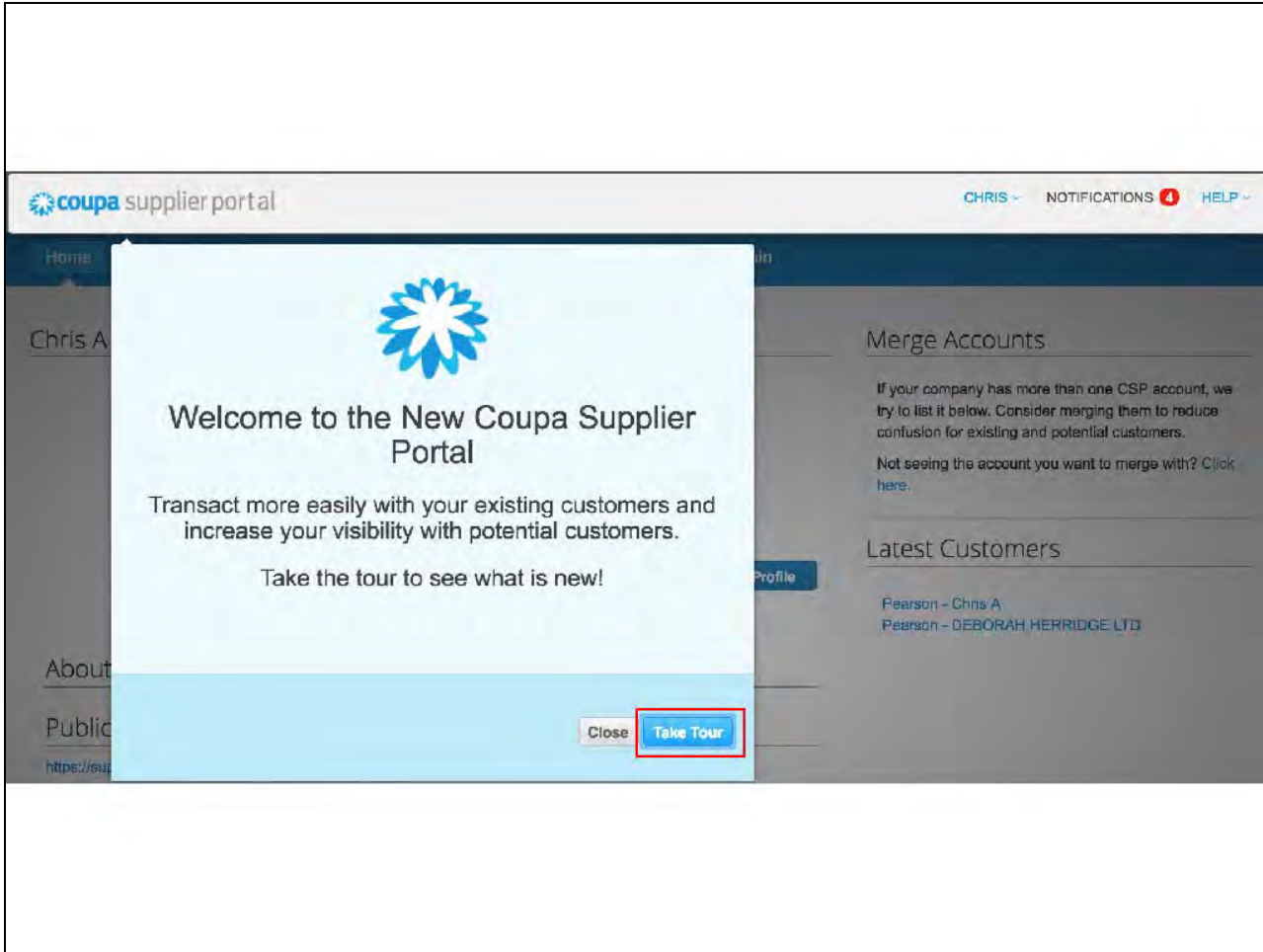
Slide notes

By choosing you other email notification with the subject line "New PO", you can view all the PO details in your email as well as click on the View Order button to be redirected to the Coupa Supplier Portal.



Slide notes

Use the email and password you created during the onboarding process to log in to the Coupa Supplier Portal.



Slide notes

If you are not yet familiar with the Coupa Supplier Portal, feel free to click on Take Tour, otherwise click Close to proceed.

The screenshot displays the Coupa Supplier Portal interface. At the top left, the logo reads "coupa supplier portal". On the top right, the user's name "CHRIS" is shown next to a "NOTIFICATIONS" link with a red badge containing the number "4", and a "HELP" link. Below this is a blue navigation bar with the following menu items: "Home" (highlighted with a red box), "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin".

The main content area is titled "Chris A" and features a globe icon on the left. To the right of the globe are links for "About", "Industry", "Website", "Established", and "Employees". A blue button labeled "Improve Your Profile" is positioned below these links. Underneath, there is an "About" section and a "Public Profile" section with the URL <https://supplier-test.coupahost.com/suppliers/public/14673>.





On the right side of the page, there are two sections: "Merge Accounts" and "Latest Customers". The "Merge Accounts" section contains the text: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers. Not seeing the account you want to merge with? [Click here.](#)". The "Latest Customers" section lists two entries: "Pearson - Chris A" and "Pearson - DEBORAH HERRIDGE LTD".

Slide notes

Displayed is your Coupa Supplier Portal Home Page. On the top right, you will see your name. Notifications may be highlighted with a number in red to alert you to new messages. These are the same messages that you may also see in your email. Click Orders to view all your purchase orders.

Purchase Orders

Instructions From Customer
 Please process this order according to the line item details included on the PO. All P2P compliant invoices must include: The words "INVOICE" or "CREDIT NOTE", Invoice/Credit Note Number (not to exceed 16 characters), Invoice Date, Invoice Amount, Line Item Number and Description of Goods or Services, Valid PO and/or Contract Number, Vendor name, Remit to address (Include banking information, if applicable) and Pearson Legal Entity and address including PO Requestor/Contact Name. Suppliers must attach an original invoice (including VAT registration number, if registered.)

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
COU150000003700	02/15/18	Issued	None	500 EACH of proofreading 500 EACH of copyediting 500 EACH of project management	No	3,000.00 GBP	 
COU150000003698	02/13/18	Issued	None	200 EACH of copyediting	No	1,000.00 GBP	 

The red stack of coins allows you to raise a credit memo.
 The gold stack of coins will allow you to raise an invoice.

Slide notes

A list of your purchase orders will display. Click the PO hyperlink to view the PO itself. On the right, you will note that there is a red stack of coins for creating a credit memo. Today, please click the gold stack of coins to create an invoice.

coupa supplier portal

CHRIS | NOTIFICATIONS 4 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Admin

Orders Order Lines

Select Customer Pearson - Chris A Configure PO Delivery

Create Invoice Create

Invoice number cannot exceed 16 characters.

General Info

* Invoice # Test200

* Invoice Date 02/13/18

Payment Term Net 10 Days

* Currency GBP

Status Draft

Image Scan Choose File No file chosen

Supplier Note Partial Invoice #1.

* Attachments Add File | URL | Text

Testing_Invoice_PDF.pdf

Attach a copy of your actual invoice for VAT/tax and audit purposes.

Complete the fields that have a red asterisk and be sure to attach a copy of your invoice.

From

* Supplier Chris A

Supplier Tax ID GB999999999

* Invoice From Address Chris A
200 River Street
London
RG9 1XW
United Kingdom
Corporation

* Remit-To Address Chris A
200 River Street
London
RG9 1XW
United Kingdom

Bank Name: Lloyds

Beneficiary Name: Chris A

Bank Account Number: ***3987

Sort Code: **3456

* Ship From Address Chris A
200 River Street
London
RG9 1XW
United Kingdom

Slide notes

An outline of an invoice that looks just like your PO will display. Please enter some required information marked with a red asterisk as follows:

Invoice number (note: the number cannot exceed 16 characters),

invoice date,

currency,

and be sure to click on File to attach a copy of your invoice for VAT, tax and audit purposes.

Your remit to address and banking details should already be completed as a result of the supplier onboarding process.

All P2P compliant invoices must include:

1. "INVOICE"
2. Invoice Number (not to exceed 16 characters)
3. Invoice Date
4. Invoice Amount
5. Line Item Number
6. Description of Goods or Services
7. Valid PO and/or Contract Number
8. Supplier Name
9. Remit-to Address (include banking information, if applicable)
10. Pearson Legal Entity and Address
11. PO Requestor / Contact Name
12. Suppliers must attach an original invoice (including VAT or tax registration number, if required)

Invoice

SAMPLE INVOICE ONLY

Vendor Name: Chris A.
Vendor Address:
 200 River Street
 RG9 1XW London
 United Kingdom

Invoice to: PEARSON, INC.
Attention: Christina Amato
 221 River St
 Hoboken, NJ 07030
 Business Group: USHE

PO Number:	COU150000003698	Invoice Number:	Test 123
Invoice Date:	1/1/2018	Total Invoice Amount:	500 GBP

Payment #	Line Item #	Task Description	Quantity	Rate (\$)	Amount (\$)
1 of X	1	copyediting	100	5	500
Total Due					500 GBP

Make all deposits payable to:
Remit to:
~~Bank Name: Lloyds~~
~~Beneficiary Name: Chris A~~
~~Bank Account Number: ****3987~~
~~Sort Code: **3456~~
 VAT ID: GB999999999

Slide notes

Slide 7: Reminder: a compliant invoice must indicate that it is an invoice (versus a credit note) and include the following: Invoice Number not exceeding 16 characters, Invoice Date, Amount

Line Item Number, Description of Goods or Services, valid PO and/or Contract Number, Supplier name and Remit to address (Include banking information, if applicable), Pearson Legal Entity and address, PO Requestor/Contact Name.

Suppliers must attach an original invoice (including VAT registration number, if registered.)

To

Customer: Pearson

* Ship To Address: 75 Upgrade street
75 Upgrade street2
San Mateo, CA 11111
United States
Location Code: 605047

The full quantity and amount display by default. Please adjust as needed and click Calculate.

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	Total
	copyediting	100	EACH	5.00	500.00

PO Line: COU150000003888-1
Contract: [dropdown]
Billing: 82018428-3.1.1-9000.7000.227105--21114-10403-720090
Supplier Part Number: [input]
Commodity: COPYEDIT

Add Tag
Add Line

Subtotal: 500.00
Shipping: [input]
Tax Description (Shipping): [dropdown] [input] 0.000
Tax Description: [dropdown] 0.00 0.00
Total Tax: 0.00
Total: 500.00

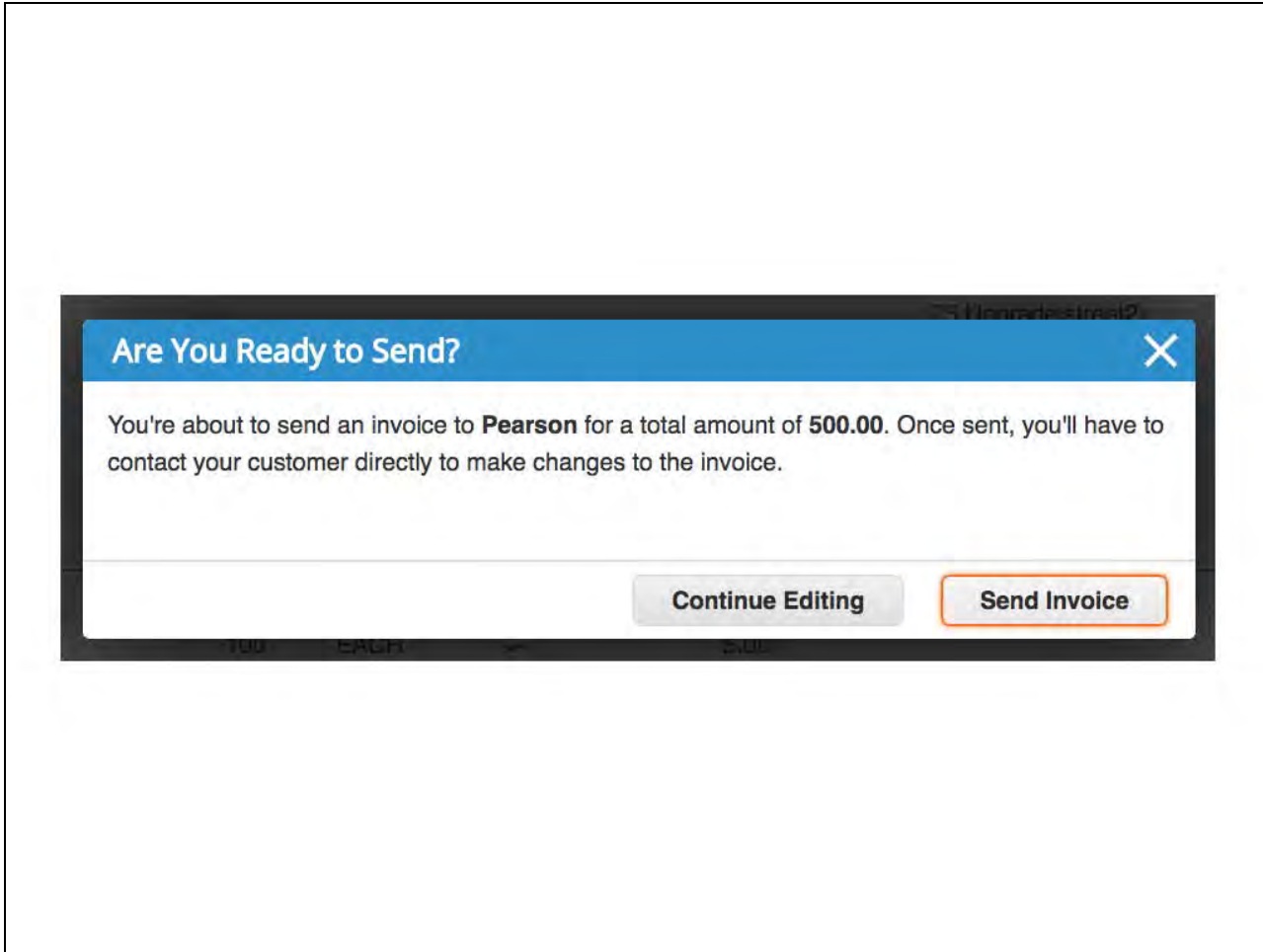
Delete Cancel Save as draft Calculate Submit

Feel free to add Comments, if applicable.

Comments [dropdown]
[input]
Add Comment

Slide notes

By default, the full quantity or amount from your PO will be pre-populated in the invoice view. Please edit the quantity or amount to equal the goods and services that have been completed to date. If you have made any adjustments, be sure to click Calculate to update the total amount due. Then you will be able to click the Submit button. Additionally, you are free to enter comments and click Add Comment.



Slide notes

A pop-up message will appear asking you to confirm if you are ready to submit your invoice to Pearson or, if you need to Continue Editing it. Click Send Invoice to proceed.

Invoices

Instructions From Customer
 If you require assistance with the status of your invoice and/or payment, please contact your PO Requestor. All P2P compliant invoices must include: The words "INVOICE" or "CREDIT NOTE", Invoice/Credit Note Number (not to exceed 16 characters), Invoice Date, Invoice Amount, Line Item Number and Description of Goods or Services, Valid PO and/or Contract Number, Vendor name, Remit to address (Include banking information, if applicable) and Pearson Legal Entity and address including PO Requestor/Contact Name. Suppliers must attach an original invoice (including VAT registration number, if registered.)

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Test321	02/15/18	Processing	COU15000003700	1,500.00 GBP	No	
Test123	02/15/18	Draft	COU15000003700	200.00 GBP	No	
Test123	02/15/18	Draft	COU15000003700	400.00 GBP	No	
Test_200	02/13/18	Pending Approval	COU15000003898	500.00 GBP	No	

Per page: 15 45 90

Invoice Against Contract

Slide notes

Click the invoices tab to view all invoices that have been created. This is the additional functionality that is available in the Coupa supplier Portal. An invoice that has been successfully submitted will appear as pending approval until the a Pearson employee completes the goods receipt. A draft invoice that has been saved, but not yet submitted, can be edited by clicking the pencil icon.

Type	Description	Qty	UOM	Price	Total
	project management	100.0	EACH	3.00	300.00

PO Line	Contract	Billing	Supplier Part Number	Commodity
COU15000003700-3		82019215-4.00-9000.1530.222012--13102-10403-720090	<input type="text"/>	PROJECT MANAGER

Add Tag

Add Line

Subtotal	400.00
Shipping	<input type="text"/>
Tax Description (Shipping)	<input type="text"/> 0.000
Tax Description	0.00 0.000
Total Tax	0.00
Total	400.00

Delete [Cancel](#) [Save as draft](#) [Calculate](#) [Submit](#)

Slide notes

In the event you have saved a draft invoice that is no longer needed, while viewing the invoice, click the Delete button to remove the record.

coupa supplier portal

CHRIS | NOTIFICATIONS 6 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Admin

Select Customer: Pearson - Chris A

Invoices

Instructions From Customer
 If you require assistance with the status of your invoice and/or payment, please contact your PO Requestor. All P2P compliant invoices must include: The words "INVOICE" or "CREDIT NOTE", Invoice/Credit Note Number (not to exceed 16 characters), Invoice Date, Invoice Amount, Line Item Number and Description of Goods or Services, Valid PO and/or Contract Number, Vendor name, Remit to address (Include banking information, if applicable) and Pearson Legal Entity and address including PO Requestor/Contact Name. Suppliers must attach an original invoice (including VAT registration number, if registered.)

Export to: View: All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Test321	02/15/18	Pending Approval	COU15000003700	1,500.00 GBP	No	
Test123	02/15/18	Draft	COU15000003700	200.00 GBP	No	
Test_200	02/13/18	Pending Approval	COU15000003698	500.00 GBP	No	

Per page: 15 45 90

Invoice Against Contract

Slide notes

The invoices tab will refresh and the deleted invoice will no longer be visible.

coupa supplier portal

CHRIS | NOTIFICATIONS 5 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Admin

Select Customer: Pearson - Chris A

Invoices

Instructions From Customer
If you require assistance with the status of your invoice and/or payment, please contact your PO Requestor. All P2P compliant invoices must include: The words "INVOICE" or "CREDIT NOTE", Invoice/Credit Note Number (not to exceed 16 characters), Invoice Date, Invoice Amount, Line Item Number and Description of Goods or Services, Valid PO and/or Contract Number, Vendor name, Remit to address (include banking information, if applicable) and Pearson Legal Entity and address including PO Requestor/Contact Name. Suppliers must attach an original Invoice (including VAT registration number, if registered.)

Export to: View: All Search

Invoice #	Created Date	Status	PO #	Total
Test321	02/15/18	Pending Approval	COU15000003700	1,500.00 GBP
Test1123	02/15/18	Draft	COU15000003700	200.00 GBP
Test_200	02/13/18	Pending Approval	COU15000003698	500.00 GBP

Per page: 15 45 90

Invoice Against Contract

- ✓ All
- Approved
- Credit Notes
- Disputed
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Payment Information
- Pending Approval
- Processing
- Voided
- Create View

Slide notes

Finally, your Invoice view can be adjusted to display different statuses, such as: Approved, Disputed, or Payment Information.

This concludes the lesson on how to flip your Pearson Purchase Order into a Coupa Invoice via email or the Coupa Supplier Portal.

If you have any questions, using the email notifications or the Coupa Supplier Portal, please contact the Procurement Helpdesk for further assistance.

coupasupplier@pearson.com

Slide notes

This concludes the lesson on how to flip your Pearson Purchase Order into a Coupa Invoice via email notification or the Coupa Supplier Portal. If you have any questions, please contact the Procurement Helpdesk at coupasupplier@pearson.com for further assistance.