Coupa Supplier Training – SAN & CSP
Agenda

1. Introduction
2. Purchase Order Transition Strategy
3. Creating Electronic Invoices with Coupa
   a. Supplier Actionable Notification (SAN)
   b. Coupa Supplier Portal (CSP)
   c. Dispute an invoice (SAN & CSP)
4. Supplier Contact Information
## Introduction

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What is Coupa?

- Coupa is an e-procurement platform connecting buyers with their suppliers.
- Coupa has the capability for suppliers to receive POs and submit invoices.
- Coupa will be used by Ingersoll Rand to request indirect materials and services, create and communicate purchase orders, and receive invoices from suppliers.

Why is Ingersoll Rand moving to Coupa?

- Ingersoll Rand has selected Coupa as it’s indirect technology platform with the objective of streamlining its Procure-to-Pay processes across indirect spend and enabling electronic transactions.
- This decision will help Ingersoll Rand standardize its business processes and shorten the invoicing procedures leading to improved quality and speed when paying our suppliers.
- We understand this is a change to how we have interacted with suppliers in the past but know it will benefit all parties in the long run. We are here to support you during this transition and appreciate your willingness to adopt these new processes. If you have any questions you can contact us at IRCoupaTeam@irco.com.
Coupa key benefits

✓ Greater control over the order processing.
✓ Ability for all suppliers to create electronic invoices improving efficiency and quality of transactions.
✓ Better communication and visibility with Ingersoll Rand.
✓ Improved directed buy for users to accelerate spend with our preferred suppliers.
✓ Improved quality & faster invoice-to-pay process with convenient visibility into the status of your invoices/payments.
✓ No installation of hardware or software required.
✓ Web applications that are quick to set up and easy to use.
✓ Dedicated help desk resources to provide you with support, answer questions and ease the transition process (IRCoupaTeam@irco.com).
✓ Best of all, it’s free of charge! There is no cost for you to transact through this application.
After reviewing this training documentation you will have gained a basic understanding of the Coupa system and its introduction at Ingersoll Rand. You will be able to:

- Register and setup your profile on the Coupa Supplier Portal (CSP).
- Perform basic navigation of the Coupa Supplier Portal (CSP).
- View/manage purchase orders through the Coupa Supplier Portal (CSP).
- Create invoices/credit notes within the Coupa Supplier Portal (CSP) via the “PO flip” functionality and via email notification, also known as Supplier Actionable Notifications (SAN).
What is Changing?

• Ingersoll Rand is in the process of rolling out Coupa globally. In Europe, we will have a phased rollout by country. We expect to go live with the new system starting in October 2019.

• Purchase orders sent from Coupa will have a naming convention of CPO-1XXXXXXXX and will require invoice submission through Coupa via the new electronic invoicing procedures.
  • Any purchase orders received that do not contain the CPO-1XXXXXXXX naming convention should be handled using the current processes.
  • Your local contact may still send POs to you manually for the foreseeable future, so please confirm all orders with the requester.

• Ingersoll Rand is requiring electronic invoicing through Coupa, allowing suppliers to use the Coupa Supplier Portal and Supplier Actionable Notifications to simplify & streamline the receipt and acknowledgement of purchase orders and the submission of invoices to Ingersoll Rand.
Coupa Compliant Invoicing

Ingersoll Rand will use Coupa’s Compliance-as-a-Service module.

As a supplier, you authorize Coupa to generate an invoice on your behalf based on invoice data you have provided. Coupa will send the PDF invoice to you and to Ingersoll Rand.

Coupa generated PDF invoice is the only legal invoice for you and Ingersoll Rand. You are required to use the Coupa Invoice to file your VAT declaration.

Subsequently, you explicitly agree to refrain from creating and sending your own invoices for these transactions outside of the Coupa platform or to attach any invoice images to the Coupa transaction.

If you have any question about this topic please send an email to IRCoupaTeam@irco.com
Purchase Order Transition Strategy

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PO Transition Strategy

Your current open POs will go through a transition period. The PO transition strategy will have two scenarios:

• **PO sunset strategy** :
The old POs will continue to be invoiced as usual, through the old invoicing method you are using today, until they are completed.
All new POs, sent to you after the Go Live date, will be sent through Coupa. As a result, all invoices for these new POs need to be submitted through Coupa.

  ➡️ The old invoicing method will NO LONGER be in operation after the Go Live date for new POs.

• **PO cutover strategy** :
Open POs will be converted from our legacy system to Coupa. Converted POs will have a new PO number. The new PO number will be communicated to you in a separate communication, once the transition is completed.
To be able to migrate the POs to Coupa we will have a short blackout period in which we will not be able to process invoices or create new POs. The short blackout period for invoicing against the cutover POs will be communicated to you in a separate communication.

  ➡️ Please DO NOT submit invoices during the blackout period, as they will not be processed.
Creating Electronic Invoices with Coupa

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There are two ways suppliers can submit e-Invoices through Coupa:

1. You can use the Supplier Actionable Notification (SAN) to flip a PO into an Invoice.
2. You can submit your invoices through the Coupa Supplier Portal (CSP) – preferred option.
Creating Electronic Invoices with Coupa - SAN

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The Supplier Actionable Notification is the Purchase Order e-mail you received from Ingersoll Rand.

When you receive the **Supplier Actionable Notification**, it will look similar to this:

![Supplier Actionable Notification Image]
Acting on a Coupa PO via SAN

With Coupa, suppliers will be able to quickly receive, acknowledge, add comments to, and invoice against purchase orders via the SAN e-mail received from Coupa.

As the supplier you will have the ability to act directly from your inbox when you receive a purchase order (PO) notification email.

The notification email will include action buttons, depending on where you click you will be able to Create Invoice, Acknowledge PO, or Add Comment to the purchase order.

There is no need to be logged into or registered on the Coupa Supplier Portal in order to utilize this functionality.

Note: In order to receive purchase orders via email, a PO email address must be present within your supplier record in Coupa. Please contact IRCoupaTeam@irco.com if you are unsure which email address is currently on file at Ingersoll Rand or if you’d like to update your PO email address.
Please notify Ingersoll Rand that you have received the purchase order by clicking the **Acknowledge PO** button within the emailed purchase order.

Once you click **Acknowledge PO**, a separate browser tab or window will pop up with a green banner at the top stating “**Order acknowledged**”.

![Image of Acknowledged Purchase Order]

**Purchase Order #CPO-10022520**

- **Status**: Issued - Sent via Email
- **Order Date**: 07/02/19
- **Revision Date**: 07/02/19
- **Requester**: Meletie Morrison
- **Email**: Meletie_Morrison@irco.com
- **Payment Terms**: None
- **Attachments**: None
- **Acknowledged**: Yes

**Ship-To Address**

- Aima Court 4th Floor
- 1932 Sint-Stevens-Woluwe
- Belgium
- Location Code: BESINT01
- Alt: Meletie Morrison

**Terms**: None

**Billing Information**

- **Bill To**: Andrew Emery
- **Invoices Only**: Yes
- **Invoice Instructions of Link Below**: Yes
- **United States**: Yes
- **Alt**: Accounts Payable

**Order Details**

- **Line 1**: Training item 1
  - **Description**: Training item 1
  - **Date**: 03/29/19
Commenting on a Coupa PO via SAN

The Add Comment button within the emailed purchase order will allow you to add comments to purchase orders you have received.

Once you click Add Comment, a separate browser tab or window will open and there will be a section at the bottom where you can type a comment and then click Add Comment. The comment will be added to the purchase order and the requester will be notified.
Creating an invoice via SAN

To create an invoice click the “Create Invoice” button at the top of the SAN you received.

This will bring you into the Create Invoice screen.

Fill out all fields marked with the red asterisk *

Make sure you select or enter your remit to address when prompted by the pop up box.

If you missed this or forgot, you can click the magnifying glass to the right of the address fields.

* Invoice From Address  No address selected
Creating an invoice via SAN

Go to the “Lines” section of the invoice, where you can review (and update if applicable) the value being invoiced.

If applicable, in case of an **Amount based PO** update the amount in the “**Price**” field with the amount you are invoicing. Delete the value shown and enter your invoice amount.

If applicable, in case of a **Quantity based PO** update the quantity in the “**Qty**” field with the quantity you are invoicing.
Creating an invoice via SAN

Please select the VAT rate from the drop down menu which applies to the respective line item. VAT Amount will be automatically calculated. Please note that it is a mandatory field.

If applicable, use the Tax Reference section to provide justification on the selected VAT Rate.

If you have any additional charges (e.g. shipping, handling, etc.), please add a line by clicking on the add Line button.

Note that if a 0% rate or a tax exemption is applied, a justification must be provided in the Tax reference Box.
Creating an invoice via SAN

For any additional lines, add, in the **Description** box, the type of charges, and fill in the amount of the charge in the “**Price**” field.

Please select the **VAT rate** from the drop down menu which applies to the respective line item. VAT Amount will be automatically calculated. **Please note that it is a mandatory field.**

If applicable, use the **Tax Reference** section to provide justification on the selected VAT Rate

Click the calculate button just under the Totals and Tax section: This will update the total value being invoiced based on the amount in the “**Price**” field above and any additional charges entered.
Creating an invoice via SAN

Click on the Submit button

Please acknowledge that **Coupa will create an invoice on your behalf** and Click the “Send Invoice” button in the pop up.

**Congratulations, your invoice is now submitted!**

Once invoices have been received/reviewed the **status will updated automatically.**

**Coupa generated PDF invoice is the only legal invoice for you and Ingersoll Rand. You are required to use the Coupa Invoice to file your VAT declaration. You explicitly agree to refrain from creating and sending your own invoices for these transactions outside of the Coupa platform or to attach any invoice images to the Coupa transaction.**
Creating an invoice via SAN

After the invoice is in **Approved** status, it will be paid according to the payment terms and payment schedule contractually agreed upon between Ingersoll Rand and the supplier.

Invoices

<table>
<thead>
<tr>
<th>Status</th>
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<th>Total</th>
<th>Unanswered Comments</th>
<th>Actions</th>
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<tr>
<td>Processing</td>
<td>CPO-10000207</td>
<td>0.00 USD</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>CPO-10000207</td>
<td>500.00 USD</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Draft</td>
<td>CPO-10000207</td>
<td>500.00 USD</td>
<td>No</td>
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Creating Electronic Invoices with Coupa - CSP

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Registration to Coupa Supplier Portal

You will receive an invitation email to the Coupa Supplier Portal from Ingersoll Rand with the subject line: “Action Required from Ingersoll Rand - Click Below to Join Coupa”.

If you did not receive an invitation email please send a request to: IRCoupaTeam@irco.com.

Once you receive the email invitation from Ingersoll Rand, click the “Join Coupa” button. This will take you to the registration screens where you will complete your profile.

If you’re not the right person or you’d like someone else to register instead, you can forward the invitation to register by clicking the “Forward This” button and entering the recipient’s e-mail.
Registration to Coupa Supplier Portal

The first registration screen will be your name, company name and password creation. Your e-mail address will populate from the invitation.

Once the fields are complete, check the Privacy Policy and review Terms of Use, then check box and click “Submit”.

```
Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for help.

* First Name: John
* Last Name: Doe
* Company: TEST SUPPLIER (NC-DAVIDS-01)-88
* Email: irtestsupplier2@gmail.com
* Password: [redacted]

Use at least 8 characters and include a number and a letter.

* Password Confirmation: [redacted]

I accept the Privacy Policy and the Terms of Use.

Submit
```
Registration to Coupa Supplier Portal

Before being able to e-Invoice Ingersoll Rand through Coupa, as a supplier you must do your e-Invoicing setup first on the Coupa Supplier Portal:

• Go to Admin;
• Choose: E-Invoicing Setup;
• Click on Add legal entity.
Registration to Coupa Supplier Portal

Next, fill out your “Invoice From” address details:

• If your Remit-To and Ship From addresses are different, please uncheck the respective boxes and enter the information as needed.

• If you have more than one address for Invoice From, Remit-to or Ship From, you can add these in the “Admin” tab of the portal under e-Invoicing by clicking the “Add Legal Entity” button.

You may have more than one instance of Ingersoll Rand listed as customer depending on how many of our businesses you work with. Please make sure you select all instances for Ingersoll Rand.
Registration to Coupa Supplier Portal

Adding a **new legal entity**, you will be able to add all information in the following screens. The fields with the red star are mandatory.

- Populate your official Legal Entity Name
- Specify the country where your Legal entity is registered
- Click **Continue**

Complete at least all mandatory fields:
- Co Reg Num
- Place of registration
- Type of Company
- Licence Number
- Register Legal Entities

Finally, **Save and Continue**
Populate the address details where you as a supplier are located

Important is to specify whether you want to use this address as your Remit-To and/or Ship-From address.

At the end, you will still be able to add more Remit-To and/or Ship-From addresses
Registration to Coupa Supplier Portal

Scroll down and find the following screen to populate your **Tax ID – Miscellaneous – Banking information.**

**Tax ID** : Populate the tax ID(s) for the countries where your company is registered

**Miscellaneous** : Important when you choose to interface directly with Ingersoll Rand’s Coupa environment through cXML. The Invoice From Code will be used in the cXML code as an unique identifier for your company information.

**Banking Information** : Please fill out as much information as possible in the « Banking Information » field. All the information provided here will be used to auto-fill all your future invoices. You can change the information any time.
Registration to Coupa Supplier Portal

The following screen shows a summary of the Remit-To addresses linked to your Legal entity.

Bear in mind that the first Remit-To will show based on the previous screen where you were able to select the checkbox: ‘Use this address for Remit-To’.

Once you have finished click Next.

Note:
- The supplier can manage his Remit-To by clicking on Manage
- The supplier is able to add extra Remit-To by clicking on Add Remit-To
Registration to Coupa Supplier Portal

Bear in mind that the Ship-From shown is based on a previous screen where you were able to select the checkbox: ‘Use this for Ship-From address’.

Once you have finished click **Next**.

**Note:**
- The supplier can manage his Ship-From address(es) by clicking on Manage
- The supplier is able to add extra Ship-From addresses by clicking on Add Ship From
Registration to Coupa Supplier Portal

Your Setup is Complete! Congratulations!

Once you’ve completed the registration process you can:

• Go to the Orders tab to see your POs and/or create invoices.
• Go to the Invoice tab to see previously submitted invoices and their status.
• Return to the Admin tab.

To get paid - Most customers require that you send them this payment info in addition to providing it on the invoice.
• Click on the Profile Tab to see if your customer has a form that collects payment information.
• Otherwise, you'll have to send it to them through another channel.
Registration to Coupa Supplier Portal

The last step required to set you up on the Coupa Supplier Portal is ‘Accepting the Terms of Use’.

Option 1: Admin Screen

- Go to Admin;
- Click on Terms of Use;
- See a pending action under Acceptance Required;
- Read and Accept the Terms of Use.

Congratulations, you are now setup on the Coupa Supplier Portal and can make use of all its functionalities.

Option 2: Order Screen

- Wait for the receipt of the first Purchase Order;
- Create invoice using the PO-flip function;
- You will get the message to ‘Agree on the current Terms of Use’.
Registration to Coupa Supplier Portal

After joining the CSP and logging in for the first time you will the welcome screen below.

By clicking the “Take Tour” Button, you can take a tour of the CSP functionalities.
Registration to Coupa Supplier Portal

Once you’ve completed the registration you can log into Coupa Supplier Portal which can be accessed at supplier.coupahost.com.

This is the home page you will see when you log in to CSP.
CSP Profile Settings

In the middle of the home page, is a **Improve Your Profile** button. This will allow you to add various pieces of information about your company to your public profile. Please note that any changes you make to your public profile will be available to any of your customers that are using Coupa, not just Ingersoll Rand.

At the bottom of the home page you can click a link to view your **Public Profile**.

On the right hand side you are able to **Merge Accounts** if you have multiple Coupa Supplier Portal accounts. At the top is the **Admin** tab which you will want to click when first using the CSP.

![CSP Profile Settings Image](https://supplier-test.coupahost.com/suppliers/public/138017)
When you click the **Admin** tab at the top of the home page you will be taken to the Admin Users section first.

- You will see all of the users that currently have access to the Coupa Supplier Portal and you can add additional users by clicking the **Invite User** button on the right side, or **Edit** the existing users.

- The **Merge Requests** is used if you have multiple Coupa Supplier Portal accounts. You can use this merge requests to combine them all into one account.

- Next is the **E-invoicing setup**. If you added your addresses when registering you may not need to visit this page. If you have updates to make or additional addresses you can make the changes here:
  - Click **Add Legal Entity** and fill out the legal entity name and country fields to add a new address.
  - Click the blue **Actions** button to edit and existing address.
Managing Users in CSP

Inviting a User

- Using the supplier portal, you can invite additional users in your company access to the CSP.
- Click on **Admin** tab
- Click on **Invite User** button
- Enter the user's information.
- Select which **permissions** the user should be able to access.
- Select which **customer(s)** the user should be able to access.
- Click **Send Invitation**.
Managing Users in CSP

Notification sample

After you have sent the invitation, the employee will receive an email notification, with a link to register.

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Action Required for IRTestSupplier Supplier - Click Below to Join Coupa

Hi Nanda H,

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more when working with buying organizations that use Coupa.

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!

Join Coupa  Forward This

Overview Learn more about the Coupa Supplier Portal  Need Help? Answers to common questions and issues  Coupa Info Learn more about how companies use Coupa
Viewing Orders in the CSP

The **Orders** tab at the top of the home page will display all **Purchase Orders** sent by Ingersoll Rand. Use the **Search** functionality to find purchase orders by number. You can sort by column, by clicking on any of the column headers (**PO Number**, **Status**, **Acknowledged At**, **Items**, **Unanswered Comments**, **Total**, and **Actions**). **View** functionality should be set to “All”.

All purchase orders on this screen are hyperlinked and you can view additional information about the purchase order by clicking on the blue PO# hyperlink.

If you’re not seeing a particular PO you may need to select one of the other Ingersoll Rand customer records using the **Select Customer** dropdown.
Viewing Orders in the CSP

Set your PO delivery preferences by clicking the **Configure PO Delivery** button.

Let Ingersoll Rand know how you’d like to receive purchase orders by entering an email address or cXML credentials. For cXML requests, please reach out to us at: IRCoupaTeam@irco.com.
Viewing Orders in the CSP

When you click on a purchase order blue hyperlink the purchase order will open.

At the top it will show you:
- Status,
- Order Date,
- Revision Date,
- the original Requester,
- the requester’s Email,
- the Payment Terms you’ve negotiated with Ingersoll Rand,
- Attachments.

In the upper right hand corner you can see the shipping address.
Viewing Orders in the CSP

Scrolling down you can see the **Lines** on the purchase order. Here you can see:

- The type of order **QTY** or **AMT**
- A **Description** of what has been ordered.
- **Quantity** Ordered and **Price**
- How much has been **Invoiced** against the purchase order.

- **Create Invoice** will take all of the PO information and turn it into an invoice.
- **Print View** will open another window displaying additional information, such as currency and contact information and Ingersoll Rand Terms & Conditions.
- The **Comments** section will allow you to add comments to the purchase order.
Creating an invoice from CSP

As seen in the previous slide, you can create an invoice by clicking on the **create invoice** button when you review your PO.

You can also create an invoice in the Orders view.

On the Home page of the Coupa Supplier Portal click on the “**Orders**” tab.
Creating an invoice from CSP

Click the Gold Stack of Coins in the actions column of the purchase order you want to invoice.

You will be taken to the Create Invoice page and the Choose Remit-To Address pop-up will display. Select the address you would like to remit-to by clicking Choose.

If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored, Coupa will ask you to create one. After the address is selected/entered, you can begin to build the invoice.
Creating an invoice from CSP

Go to the “Lines” section of the invoice, where you can review (and update if applicable) the value being invoiced.

If applicable, in case of an **Amount based PO** update the amount in the “Price” field with the amount you are invoicing. Delete the value shown and enter your invoice amount.

If applicable, in case of a **Quantity based PO** update the quantity in the “Qty” field with the quantity you are invoicing.
Creating an invoice from CSP

If you have any additional charges (e.g. shipping, handling, etc.), please add a line by clicking on the add Line button.

Please select the VAT rate from the drop down menu which applies to the respective line item. VAT Amount will be automatically calculated. Please note that it is a mandatory field.

If applicable, use the Tax Reference section to provide justification on the selected VAT Rate.

Note that if a 0% rate or a tax exemption is applied, a justification must be provided in the Tax reference Box.
Creating an invoice from CSP

For any additional lines, add, in the Description box, the type of charges, and fill in the amount of the charge in the “Price” field.

Please select the VAT rate from the drop down menu which applies to the respective line item. VAT Amount will be automatically calculated. Please note that it is a mandatory field.

If applicable, use the Tax Reference section to provide justification on the selected VAT Rate.

Click the calculate button just under the Totals and Tax section: This will update the total value being invoiced based on the amount in the “Price” field above and any additional charges entered.
Creating an invoice from CSP

Click on the Submit button

Please acknowledge that **Coupa will create an invoice on your behalf** and Click the “Send Invoice” button in the pop up.

**Coupa generated PDF invoice is the only legal invoice for you and Ingersoll Rand.** You are required to use the Coupa Invoice to file your VAT declaration. You explicitly agree to refrain from creating and sending your own invoices for these transactions outside of the Coupa platform or to attach any invoice images to the Coupa transaction.

**Congratulations, your invoice is now submitted!**

Once invoices have been received/reviewed the status will updated automatically.
Creating an invoice from CSP

After the invoice is in **Approved** status, it will be paid according to the payment terms and payment schedule contractually agreed upon between Ingersoll Rand and the supplier.

If you receive a “Disputed Invoice” notification, you can use this file for the resolution steps.

*Link to Dispute Resolution Instructions: [Click HERE](#)*
Supplier Contact Information

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Coupa Disputed Invoices

There are several reason an invoice can be disputed:
- An automated dispute and will happen immediately after the invoice is submitted.
- The invoice does not match what is on the PO. This could be a part number issue, a quantity issue or a price issue.
- A manual dispute done by the PO Owner/Requestor.

How will I know if my invoice is disputed?
- You will receive an e-mail notification with the invoice number and the dispute reason (see below).

![Invoice in dispute email](attachment:image.png)
Coupa Disputed Invoices

Any disputed invoices will also show in your To Do and Notifications tab on the Coupa Supplier Portal.
Resolving a Disputed Invoice

First, you’ll need to review the reason for dispute. If there is no reason listed or it’s unclear what the issue is, please reach out directly to the PO requestor for details.

Example of what the e-mail notice will look like:

Invoice #INV0925 is in dispute

Hi,
Invoice INV0925 has been disputed by Ingersoll Rand.

Dispute Reason(s)
- Tax rate missing or incorrect

Date: 2019-09-25

Example of what the disputed invoice will look like in Notifications:

General Info

- Invoice #: INV0925
- Invoice Date: 09/25/19
- Payment Term: None
- Delivery Date: 09/25/19
- Currency: USD
- Delivery Number: None

- Status: Disputed
- Dispute Reason(s): Tax rate missing or incorrect

Next you’ll start the invoice resolution process.
Resolving a Disputed Invoice

From the invoice page find your disputed invoice and click the “Resolve” button in the Actions column. This will take you into the invoice.

You can also click the “View Online” button in the dispute e-mail or enter through the notifications tab and you will be taken directly into the invoice.
Resolving a Disputed Invoice

There are two options when resolving a disputed invoice:

1. **Cancel Invoice**: Choose this option if this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice. Coupa automatically creates a *credit note* on the invoice when you choose this option.

2. **Adjust Invoice**: Choose this option if you need to fix the price and/or quantity on this invoice. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.

For any questions regarding this process, please reach out to us at IRCoupaTeam@irco.com
Resolving a Disputed Invoice

Once you click on the appropriate resolution button, you will be navigated to the credit note creation screen.

1. Enter the **Credit Note #**
2. Enter the **Credit Reason**
3. Click on **Submit**

For any questions regarding this process, please reach out to us at IRCoupaTeam@irco.com
Resolving a Disputed Invoice

4. Click **Send Credit Note** on the pop up window

![Send Credit Note](image1)

5. You will be asked if you want to create a new invoice as a replacement for the one just cancelled. Click **Yes**

![Create Replacement Invoice](image2)
Resolving a Disputed Invoice

You will be taken to the Create Invoice page
6. Enter the **Invoice #** and all other mandatory fields
7. Ensure that you have addressed the dispute invoice reason in the new invoice
8. Scroll down and click on **Submit**
Resolving a Disputed Invoice

9. Click **Send Invoice** on the “Are you Ready to Send” pop up window
10. A green message bar appears indicating that the invoice is in processing status.
Zero Line Invoice

Coupa does not accept € 0 invoice. When you are submitting invoices for partial quantity or amount, you need to delete 0 value lines from your invoice. To delete € 0 invoice lines:

1. Click on the Orders tab
2. Click the yellow coin stack icon under Actions for the order you are invoicing
Zero Line Invoice

3. You will be taken to the Create Invoice screen. Enter the Invoice #
4. Select the Buyer VAT ID from the drop down
5. Review the line items. Click on the red ‘X’ icon next to the € 0 line.
Zero Line Invoice

6. Select **VAT Rate** from the drop down
7. Enter **Tax Reference**
8. Click on **Submit**
9. Once the invoice is successfully processed by Ingersoll Rand, you will see the status of the Invoice as **Approved**

**Note:** If you forget to delete the €0 line on the invoice, the invoice will be auto-disputed from Coupa and you will see the status on the invoice as Disputed. In this case you will have to submit a new invoice by removing the €0 line this time.
Supplier Contact Information

1. Introduction
2. Purchase Order Transition Strategy
3. Creating Electronic Invoices with Coupa
   a. Supplier Actionable Notification (SAN)
   b. Coupa Supplier Portal (CSP)
   c. Dispute an invoice (SAN & CSP)
4. Supplier Contact Information
Supplier Contact Information

If you are not the correct contact for this request, please forward this e-mail to the relevant person and provide the updated contact information to us at: IRCoupaTeam@irco.com.

Follow the link to access the Coupa Success Portal for additional info and help. https://success.coupa.com/

If you have any questions, please contact IRCoupaTeam@irco.com.

We thank you for your continued support and partnership!