BD BUYSMART (COUPA) E-INVOICE MANUAL GUIDE

Step-by-Step Instructions for Seamless E-Invoice Process

Abstract

This guide explains how to perform e-invoicing with BD BuySmart (Coupa). It provides step-by-step instructions for suppliers to manage their POs and invoices with Coupa. By following these guidelines, suppliers can improve invoicing accuracy, speed up processing times, and ensure compliance with BD BuySmart's requirements

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BD BuySmart (Coupa) e-Invoice Manual Guide

1.0 BD Invoicing Method

BD's preferred method for submitting invoices for POs starting with "69" is electronic invoicing. We are committed to making payments as efficiently as possible. BD has partnered with Coupa to offer three (3) electronic invoicing options: Coupa Supplier Portal (CSP), Supplier Actionable Notification (SAN), or Coupa cXML integrated invoicing.

2.0 How Do I Enroll?

Please note that only invoices for POs starting with "69" can be submitted through e-Invoicing. Currently, only the following countries are permitted to submit e-Invoices:

Australia, Hong Kong, Indonesia, Malaysia, New Zealand, Philippines, and Singapore.

For countries not listed, please continue to send your invoices through the standard process designated for your location.

2.1 Coupa Supplier Portal (CSP)

Create invoices directly from purchase orders on the Coupa Supplier Portal. This method is ideal for suppliers with low to medium volume purchase orders and invoices, or those who want to manage all transactions from their customers who use Coupa in one place.

2.1.1 Pre-requisites for Onboarding New Suppliers to the CSP

For first-time users, follow these steps to receive Coupa invitation:

Step 1: Create a BD Services Store account

- Visit https://www.bd.com/services,
- Click "Create or Update User Account", fill in the required information and submit.

Note: Use your company's primary contact email address to register.

- You will receive an acknowledgement email from BD Services, confirming your Registration Request is pending approval.
- Once approved, you will receive an e-mail with your unique User ID and password.

Step 2: First-time log in to BD Services Store

- Use the User ID and password received via e-mail to sign in.
- You will be prompted to set up your permanent password, enter the Current Password, provide and confirm New Password, and click "Submit."

Note: If you are an existing user in BD Services Store, you can skip Steps 1 and 2 and proceed to log in to raise ticket.

Step 3: Raise a ticket on BD Services Store

- Select the "Req to Pay Inquiry" menu.
- Fill in the mandatory fields and input your queries details as: "Request for Coupa registration email," then submit.

Step 4: Receive and respond to the Coupa invitation

- You will receive an email invitation to Coupa within two (2) working days.
- Click the "Join Coupa" button in the email. If you don't see the invite, check your Spam or Junk folder.

Note: The invitation link to CSP will expire within 48 hours.

Step 5: Complete the registration

- Fill in the mandatory fields on the account creation page and complete the registration.

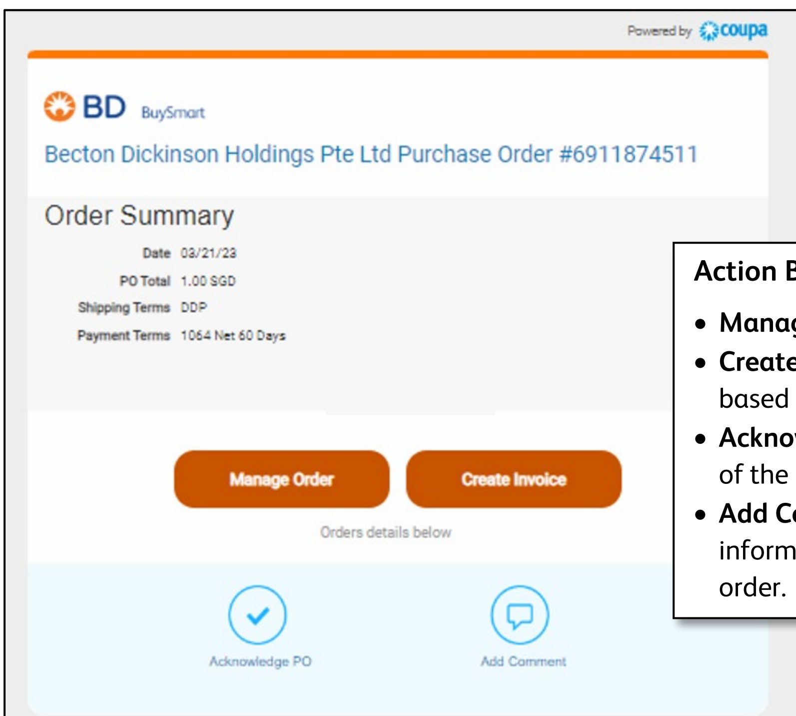
Step 6: Access the Coupa Supplier Portal

- Visit https://supplier.coupahost.com
- On the login page, enter your registered email address and password, then click "Login."
- You will be able to view your purchase orders, create invoices, and monitor invoice statuses in the CSP.

Note: If you encounter any errors, please submit a ticket through the BD Services Store. For a step-by-step BD Services Store guide, visit https://bd.com/invoicing-and-po-guidelines-gar, scroll down to the “BD Services Store Guidelines” section, and choose the relevant document for more information.

2.2 Supplier Actionable Notification (SAN)

Suppliers can act on POs directly from email notifications for POs created in BuySmart (Coupa). This includes options to acknowledge, create an invoice from, and add a comment to a PO. All Suppliers receiving PO emails will see these options.



Action Buttons in PO Email:

- **Manage Order –** View the PO.
- **Create Invoice –** Generate an invoice based on the PO details via SAN.
- **Acknowledge PO –** Confirm receipt of the PO.
- **Add Comment –** Provide additional information or notes related to the order.

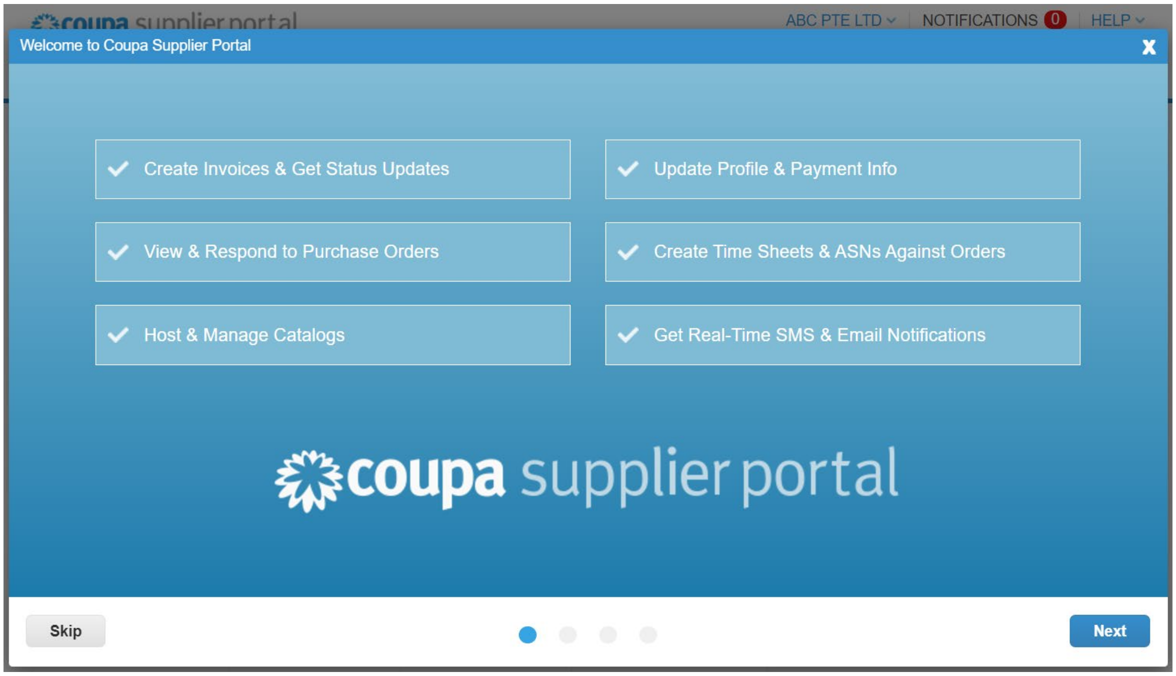
2.3 Coupa cXML Integrated Invoicing

System integration with BD BuySmart (Coupa) allows you to send cXML invoices directly to BuySmart (Coupa). This is ideal for suppliers with a high volume of purchase orders or those who automate their invoicing.

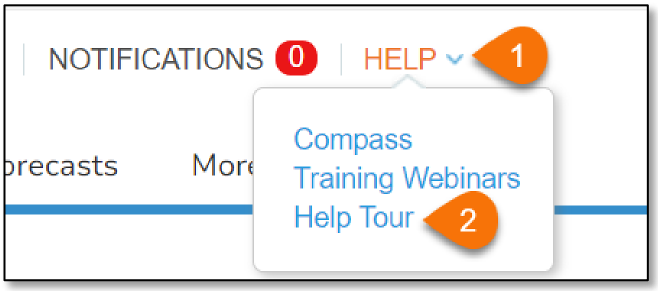
- For Suppliers interested in cXML integration, please raise a ticket via BD Services Store. For detailed instructions, visit https://bd.com/invoicing-and-po-guidelines-gar, scroll down to "BD Services Store Guidelines" section and select the "Raising A Ticket" document.

3.0 CSP Welcome Tour

When you first log in to Coupa Supplier Portal at https://supplier.coupahost.com, a Help Tour will appear on the Home screen to guide you through the main features and functionalities.

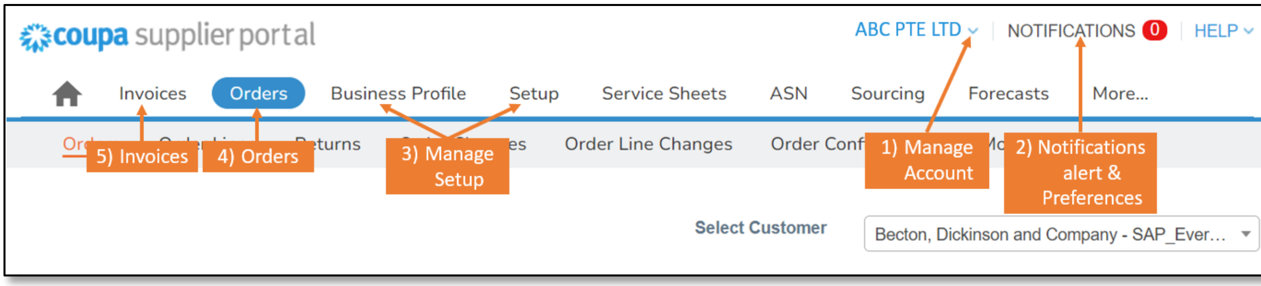


You can view the Help Tour anytime by clicking on "Help" in the top right corner of the page.



3.1 CSP’s Home Page & Important Features – Initial Setup

The Coupa Supplier Portal (CSP) offers a range of features designed to streamline supplier management and enhance efficiency such as Notifications, Orders, Invoices, and manage your Account and Setup. Before sending any invoices, please ensure you have set up e-Invoicing with Coupa.



3.1.1 Legal Entity Setup

As the Admin for this account, you can set up a legal entity by following these steps:

Step 1: Click on the “Setup” tab in the header.

Step 2: Under Admin page, go to the “Legal Entity Setup” from the left panel of the page.

Step 3: Click the "Add Legal Entity" button at the upper right corner.

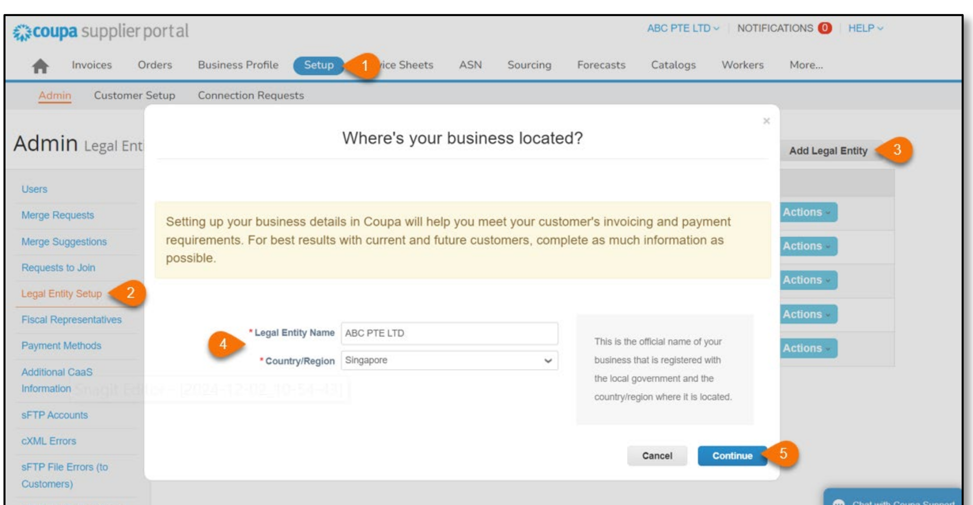
Step 4: Enter your Legal Entity Name & Country/Region and click “Continue”

Step 5: In the next page, fill in all the required fields marked with a red asterisk (*) and your Tax ID. If you are using the same address as the one provided above, select the checkbox “Use this address for Remit-To” and “Use this for Ship From address”. Click “Save & Continue”.

Step 6: Choose Payment Type as Address. If you are using the same address you entered in Step 5 for Remit-To address, it will already be displayed here for you. Click “Save & Continue”

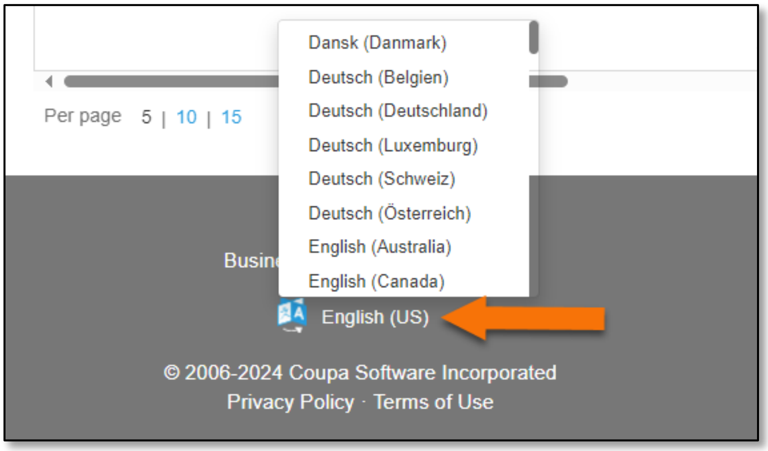
Step 7: In the next page, review the information, click “Next” and click “Done”.

Step 8: A Setup Complete pop-up message will confirm that this legal entity can now be used on new invoices.



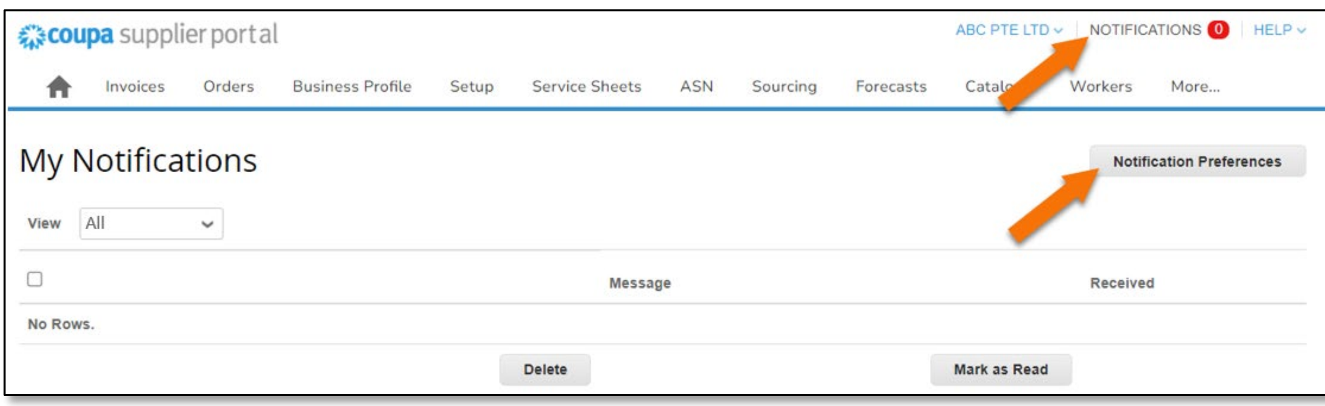
3.1.2 Language

Select your preferred language by clicking on the default language at the bottom middle of the page.



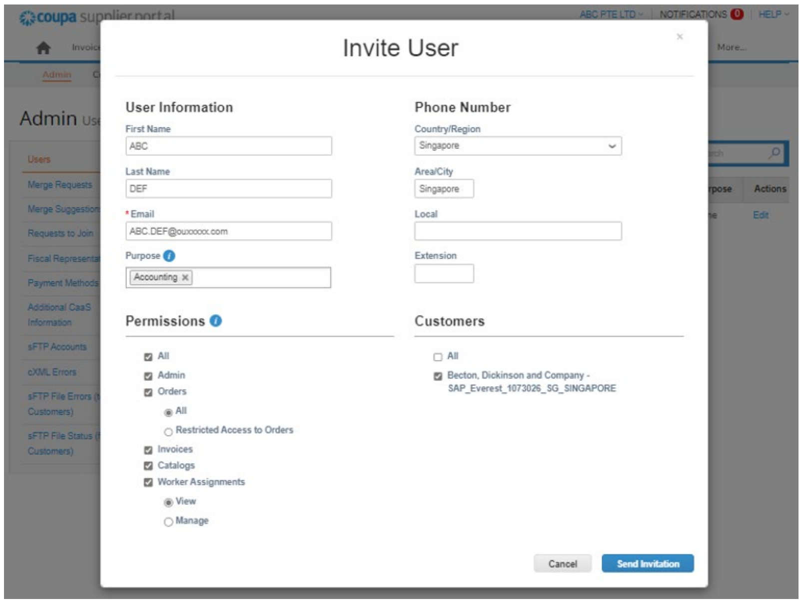
3.1.3 Notification Preferences

Set your notification preferences by clicking on "Notifications" at the top right corner of the page. Adjust your settings and click "Save" at the bottom.



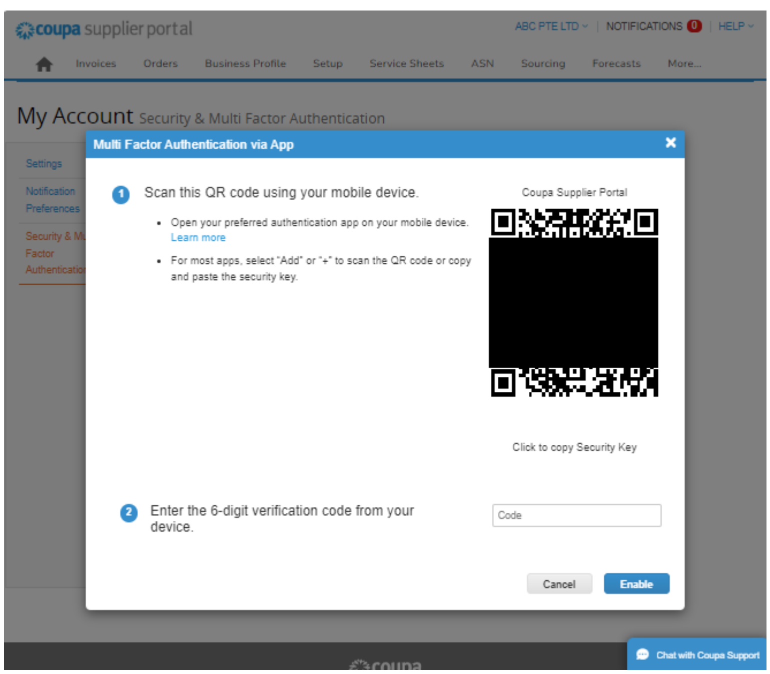
3.1.4 Inviting Additional Users to CSP

To invite additional users, go to Setup tab and click "Invite User" under Admin Users page. Enter the user's information, select the permissions and customers you want to grant access to, and click "Send Invitation." The user will receive an email from Coupa to accept the access and create a password.



3.1.5 Security & Multi Factor Authentication

For enhanced security, enable Multi Factor Authentication by following the on-screen instructions. This step is optional.

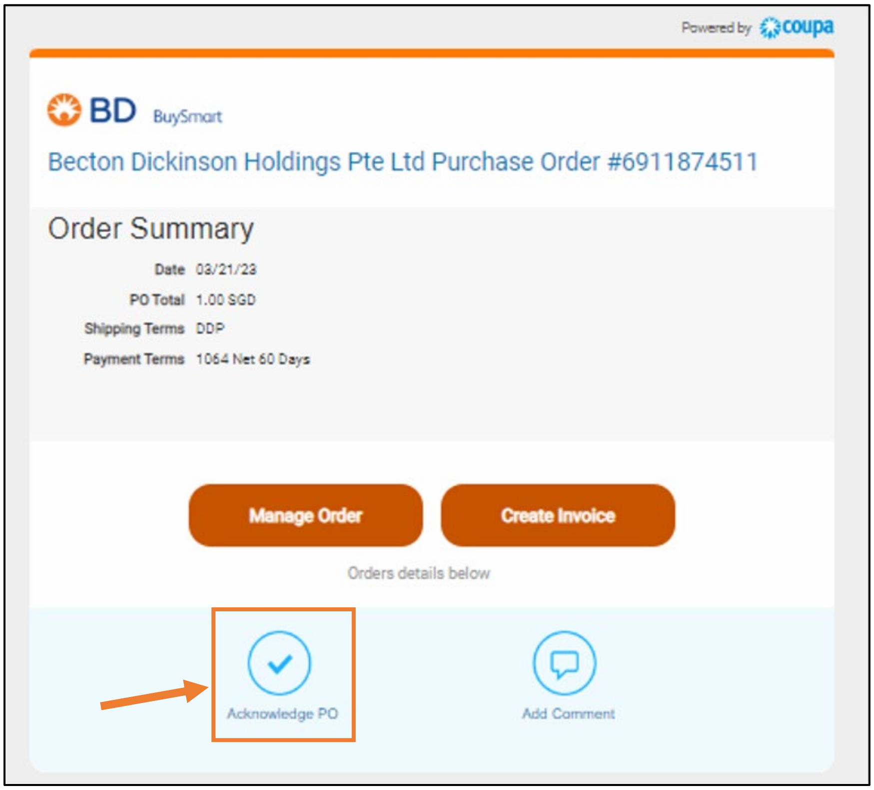


Note: If you encounter any errors during setup, contact the Coupa Support team via the chat box at the bottom left of the page. For assistance from the BD support team, submit a ticket through the BD Services Store.

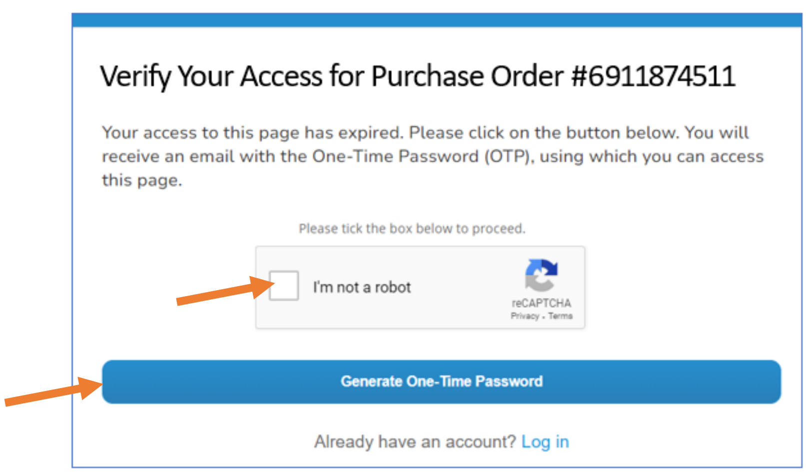
4.0 How to Acknowledge Purchase Order

4.1 Acknowledging a PO from an HTML-formatted email – SAN

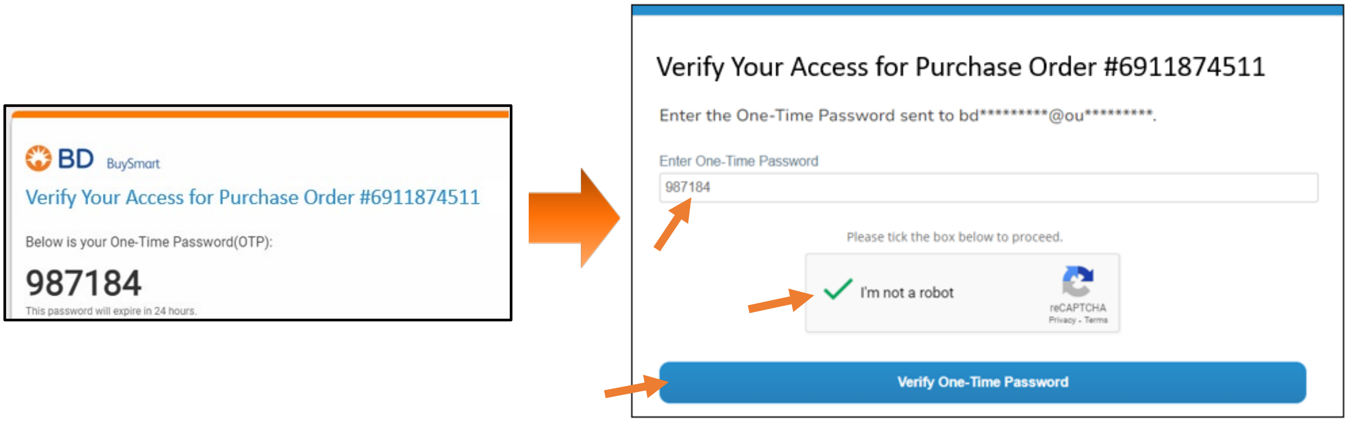
Step 1: You can acknowledge the PO directly from the email without logging into your Coupa Supplier Portal (CSP) account. Within the email, find and click the "Acknowledge PO" button.



Step 2: You will be prompted to verify your access with a One-Time Password (OTP).



Step 3: Check your email for the 6-digit OTP sent to you. Enter the 6-digit on the OTP page and click "Verify OTP."



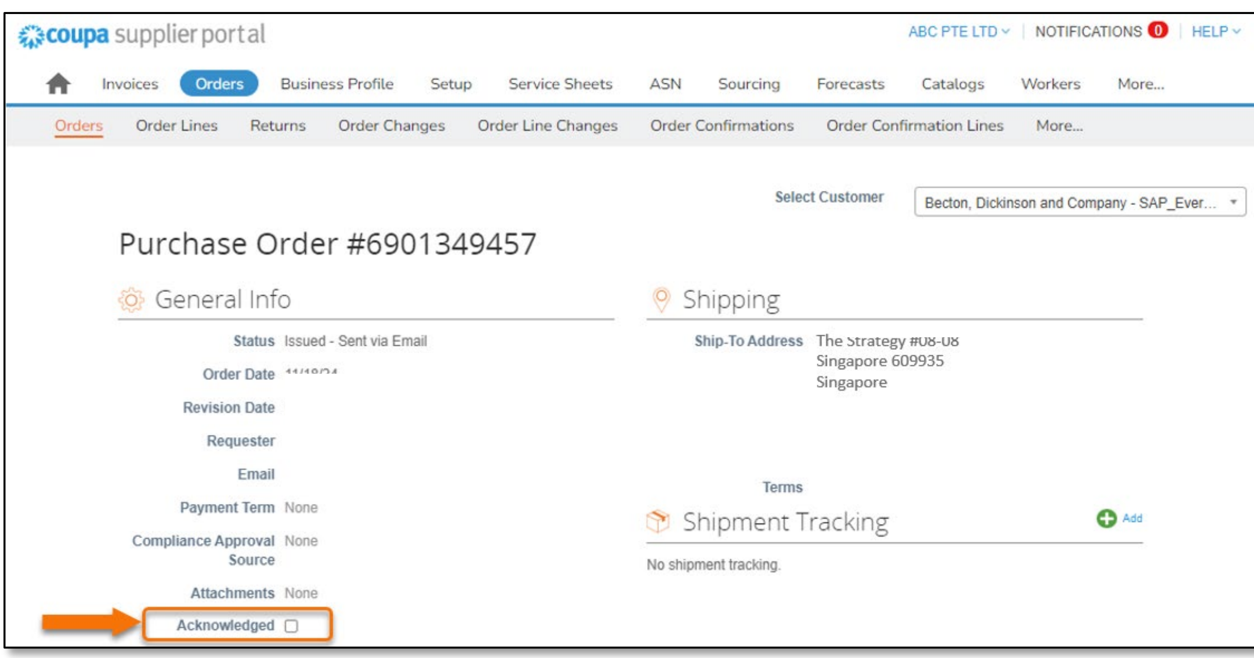
Step 4: You will be directed to the PO page. Click the "Acknowledged" checkbox to confirm receipt of the order.

4.2 Acknowledging a PO in the Coupa Supplier Portal (CSP)

Step 1: Login to the CSP, go to the "Orders" tab and select your customer from the dropdown list.

Step 2: Click on the PO number hyperlink and you will be directed to the PO page.

Step 3: Check the "Acknowledged" box to confirm the order.



5.0 Invoicing and Credit Notes Requirement

To ensure timely payment from BD:

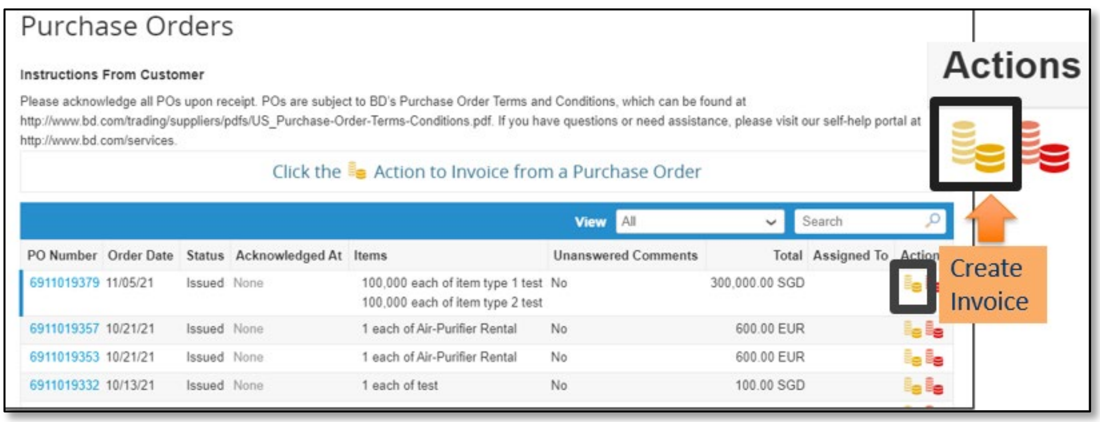
- Your invoices must comply with all relevant country, legal, tax, and BD requirements.
- If your invoices do not meet these requirements, BD will dispute them and provide comments explaining the reasons for the return. A credit note may or may not be required in such cases.
- Payments are processed weekly. Invoices are paid in the next payment run following the maturation of terms.
- Refer Appendix A for more information.

6.0 How to Create an Invoice

6.1 Creating an Invoice against a PO

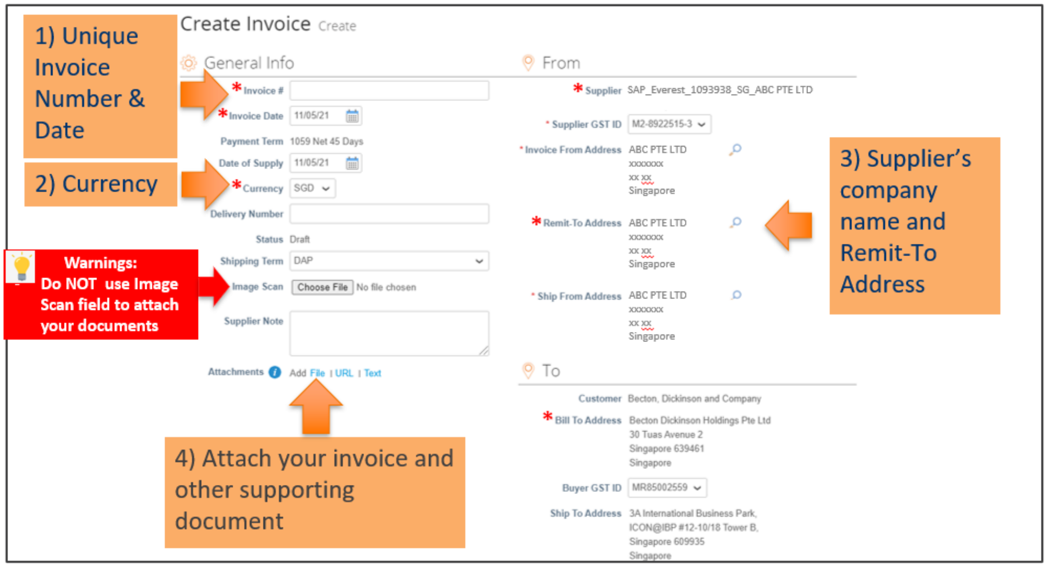
You can create invoices directly from the purchase order.

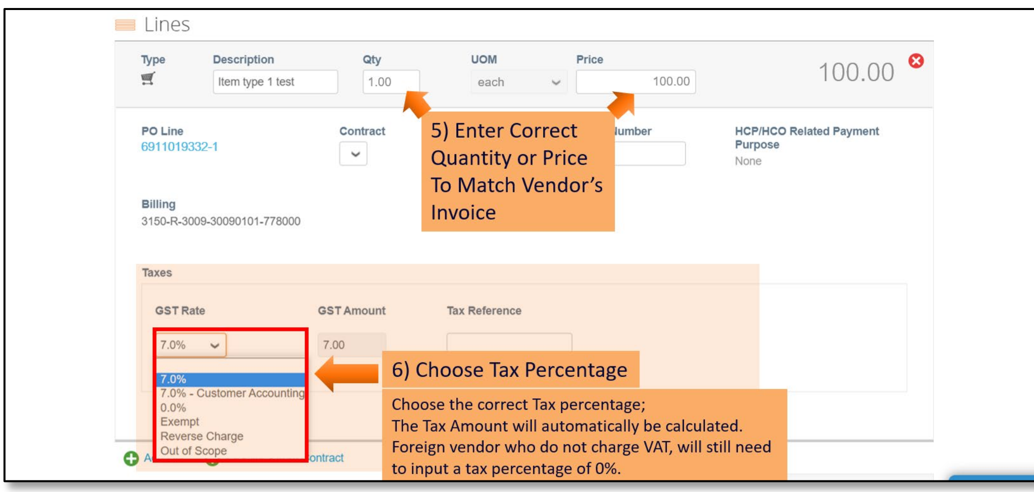
Step 1: Click the "Create Invoice" button or the "yellow coins" icon in the Actions column of the related PO line.

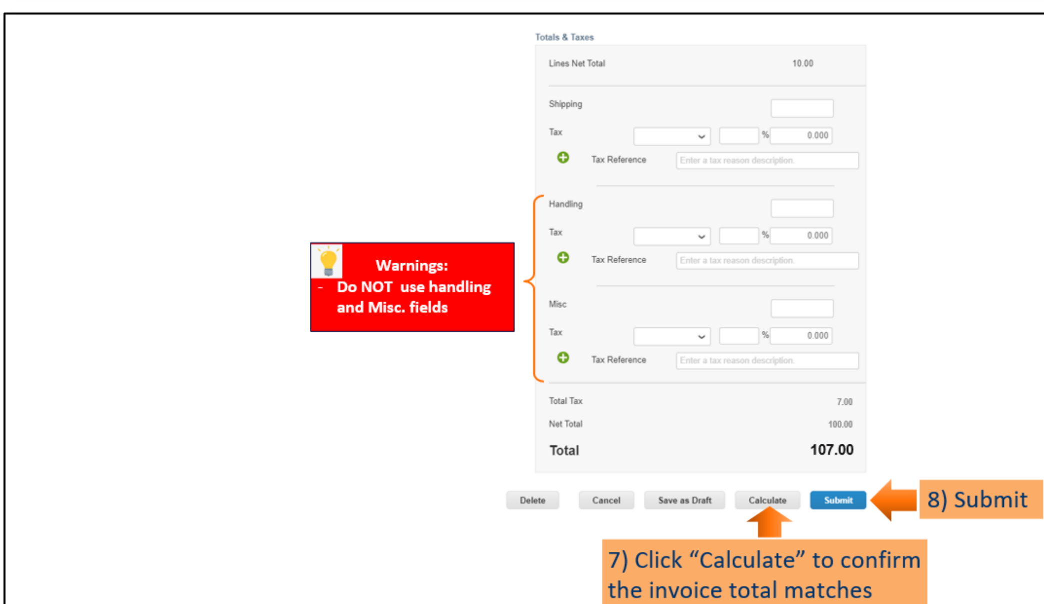


Step 2: On the Create Invoice page, complete all fields marked with a red asterisk (*). These fields are mandatory.

Step 3: Make sure the invoice number and date match your invoice. Note that the BD system only accepts up to 16 characters in the Invoice Number field and does not allow backdated invoices.


Create Invoice Create
General Info
From
1) Unique Invoice Number & Date
2) Currency
Warnings:
Do NOT use Image Scan field to attach your documents
3) Supplier's company name and Remit-To Address
4) Attach your invoice and other supporting document
Invoice #
Invoice Date 11/05/21
Payment Term 1059 Net 45 Days
Date of Supply 11/05/21
Currency SGD
Delivery Number
Status Draft
Shipping Term DAP
Image Scan Choose File No file chosen
Supplier Note
Attachments Add File | URL | Text
Supplier SAP_Everest_1093938_SG_ABC PTE LTD
Supplier GST ID M2-8922515-3
Invoice From Address ABC PTE LTD
Remit-To Address ABC PTE LTD
Ship From Address ABC PTE LTD
Singapore
To
Customer Becton, Dickinson and Company
Bill To Address Becton Dickinson Holdings Pte Ltd
30 Tuas Avenue 2
Singapore 639461
Singapore
Buyer GST ID MR85002559
Ship To Address 3A International Business Park,
ICON@IBP #12-10/18 Tower B,
Singapore 609935
Singapore


Lines
Type
Description
Item type 1 test
Qty
1.00
UOM
each
Price
100.00
100.00
PO Line
6911019332-1
Contract
HCP/HCO Related Payment Purpose
None
Billing
3150-R-3009-30090101-778000
5) Enter Correct Quantity or Price To Match Vendor's Invoice
Taxes
GST Rate
GST Amount
Tax Reference
7.0%
7.00
7.0%
7.0% - Customer Accounting
0.0%
Exempt
Reverse Charge
Out of Scope
6) Choose Tax Percentage
Choose the correct Tax percentage;
The Tax Amount will automatically be calculated.
Foreign vendor who do not charge VAT, will still need to input a tax percentage of 0%.

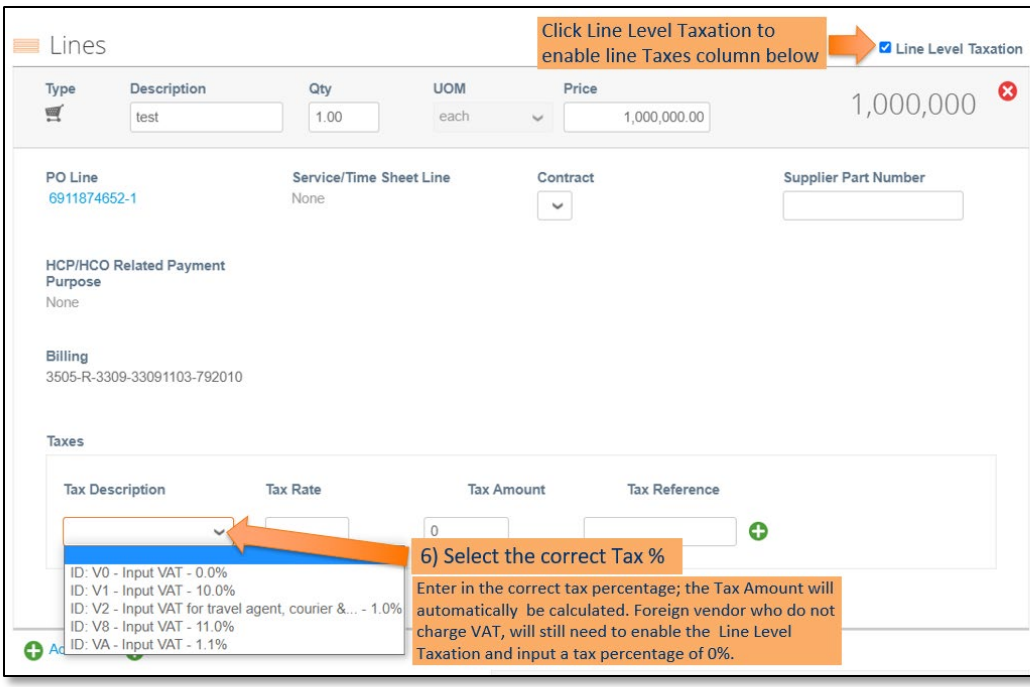

Totals & Taxes
Lines Net Total 10.00
Shipping
Tax
Tax Reference
Handling
Misc
Warnings:
Do NOT use handling and Misc. fields
Total Tax 7.00
Net Total 100.00
Total 107.00
Delete
Cancel
Save as Draft
Calculate
Submit
8) Submit
7) Click "Calculate" to confirm the invoice total matches

Notes:

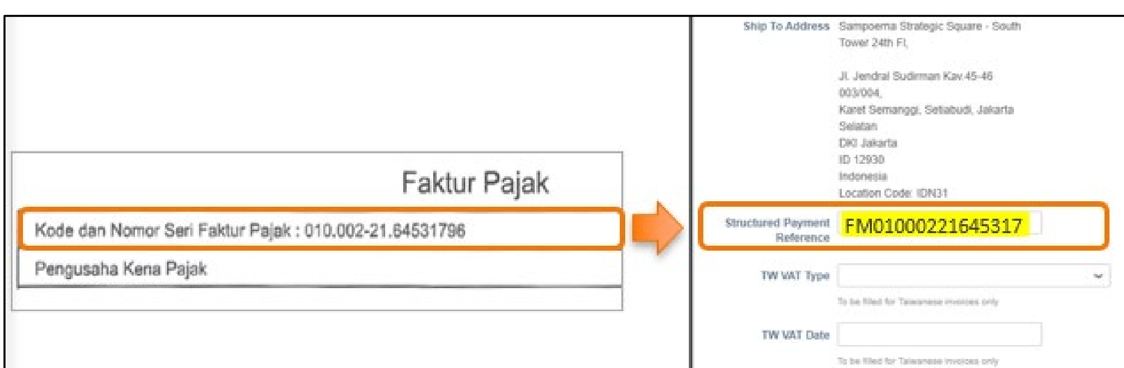
- If you are creating an invoice in a different currency, enter the exchange rate in the provided box. The local currency tax and total amount will be calculated based on this rate.
- If the Invoice From Address, Remit-To Address, or Ship From Address do not appear, click the magnifying glass to select the respective addresses. If nothing appears, setup for the Legal Entity Setup.
- If there are multiple invoices for a purchase order, the invoices must be submitted separately.

Special Condition:

- If you do not see the **Taxes** field as shown above, please click on **Line Level Taxation** checkbox.



- **For Indonesia only** – Supplier to input **"Faktur Pajak Number"** at the Structure Payment Reference, under "To" field. The Format is to add "**FM**" at the beginning, follows by 16 characters of Faktur Pajak Number without punctuation.
  Example: FM0100032122222222

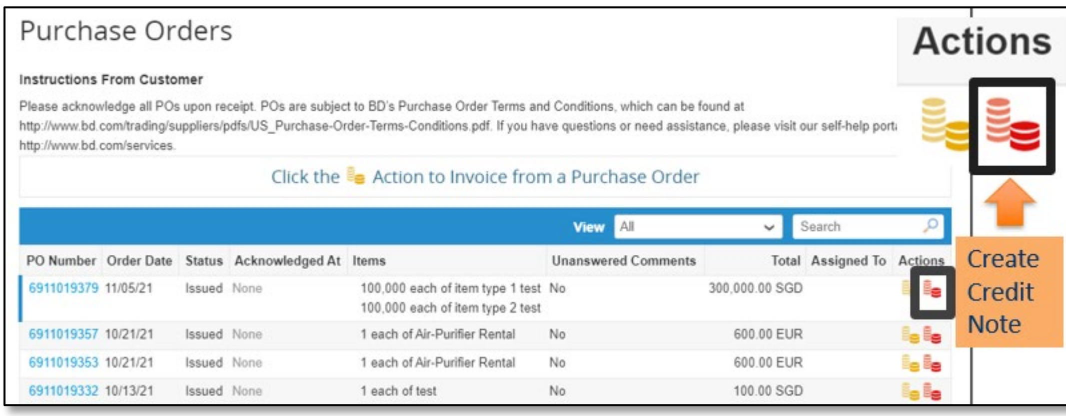


7.0 How to Create a Credit Note

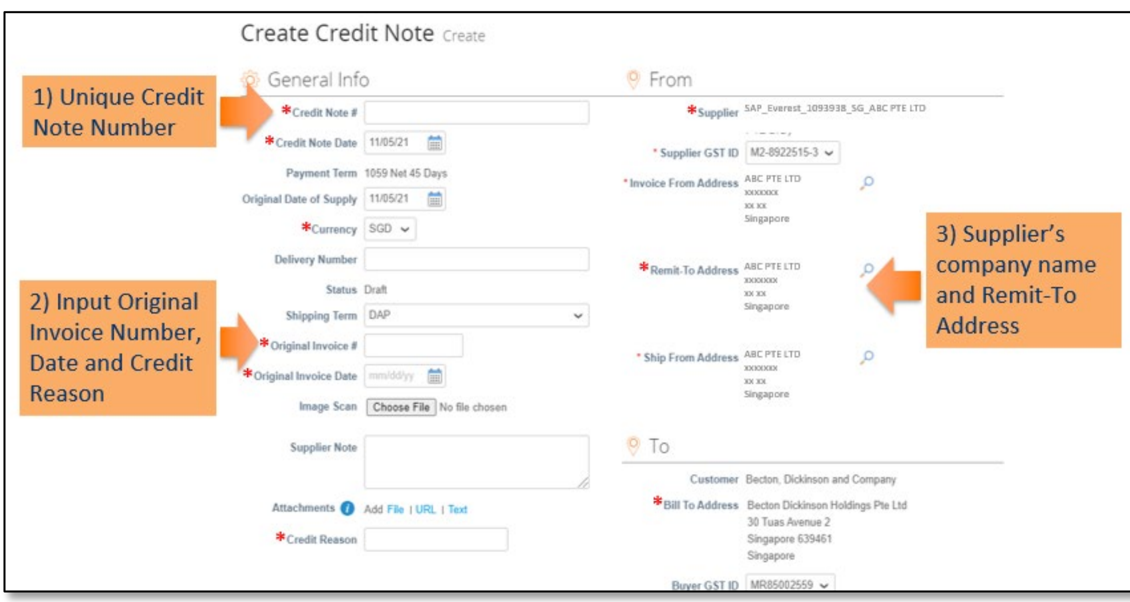
7.1 Creating a Credit Note Against a PO

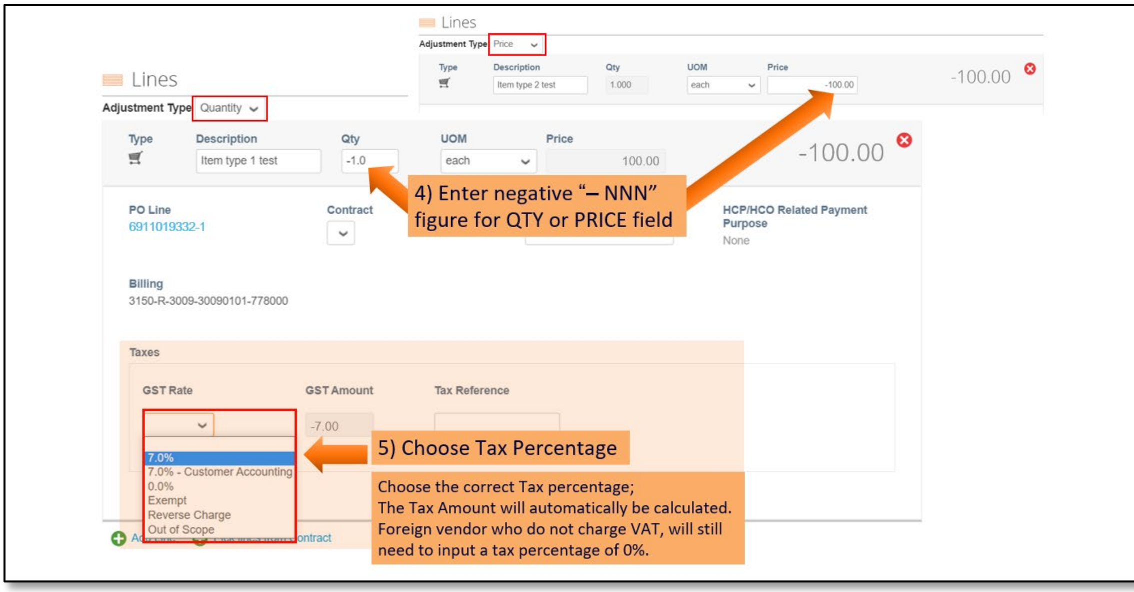
- Invoices with price or quantity discrepancies, or incorrect/incomplete information, will be rejected and disputed by the payable processor.
- When the invoice status changes to “Dispute”, you will receive an email notification from Coupa with the invoice number, the date of dispute and the dispute reason.
- The payable processor will also indicate in the dispute email if a credit note is required.
- You can create a Credit Note directly from the purchase order.

Step 1: Click the “red coins” icon in the Action’s column of the related PO line.



Step 2: On the Create Credit Note page, complete all fields marked with a red asterisk (*). These fields are mandatory.

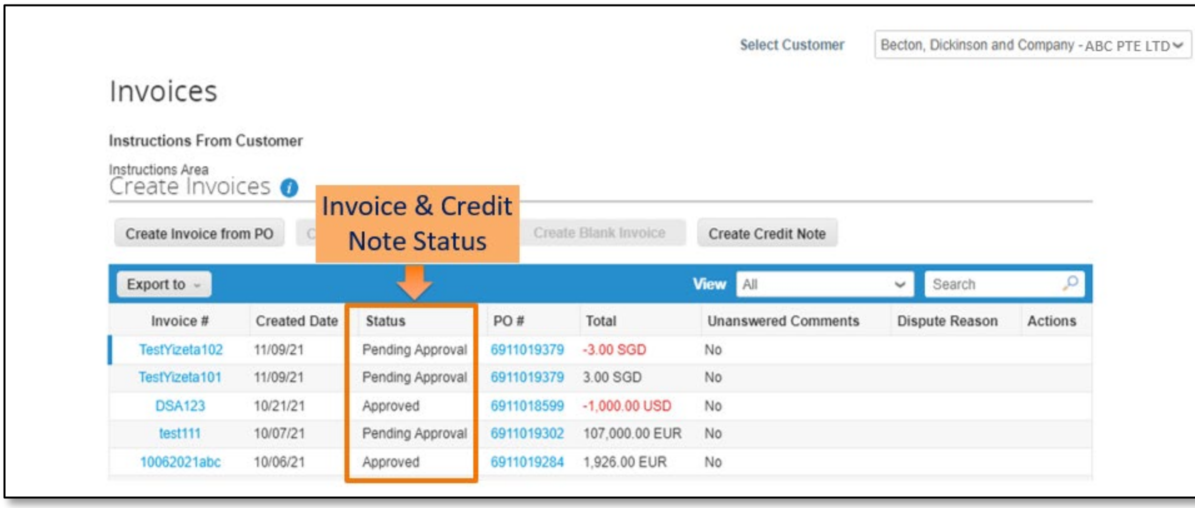



Lines
Adjustment Type Price
Type
Description
Qty
UOM
Price
Item type 2 test
1.000
each
-100.00
-100.00
Lines
Adjustment Type Quantity
Type
Description
Qty
UOM
Price
Item type 1 test
-1.0
each
100.00
-100.00
4) Enter negative "– NNN" figure for QTY or PRICE field
PO Line
6911019332-1
Contract
HCP/HCO Related Payment Purpose
None
Billing
3150-R-3009-30090101-778000
Taxes
GST Rate
GST Amount
Tax Reference
-7.00
7.0%
7.0% - Customer Accounting
0.0%
Exempt
Reverse Charge
Out of Scope
5) Choose Tax Percentage
Choose the correct Tax percentage;
The Tax Amount will automatically be calculated.
Foreign vendor who do not charge VAT, will still need to input a tax percentage of 0%.


Totals & Taxes
Lines Net Total
10.00
Shipping
Tax
%
0.000
Tax Reference
Enter a tax reason description.
Handling
Tax
%
0.000
Tax Reference
Enter a tax reason description.
Misc
Tax
%
0.000
Tax Reference
Enter a tax reason description.
Warnings:
Do NOT use handling and Misc. fields
Total Tax
-7.00
Net Total
-100.00
Total
-107.00
Delete
Cancel
Save as Draft
Calculate
Submit
7) Submit
6) Click "Calculate" & check Total is "-NNN" and qty is correct

8.0 How to Check Invoice and Credit Note Status

- Suppliers can check the status of invoices and credit notes in the Invoices tab.
- Invoice lines appear as positive figures, while credit notes appear as negative figures (– NNN) in the Total field.



- Invoices statuses:

  Draft: The invoice has been created but not yet submitted.

  Processing: The invoice has been submitted and is being processed by the Accounts Payable (AP) processor.

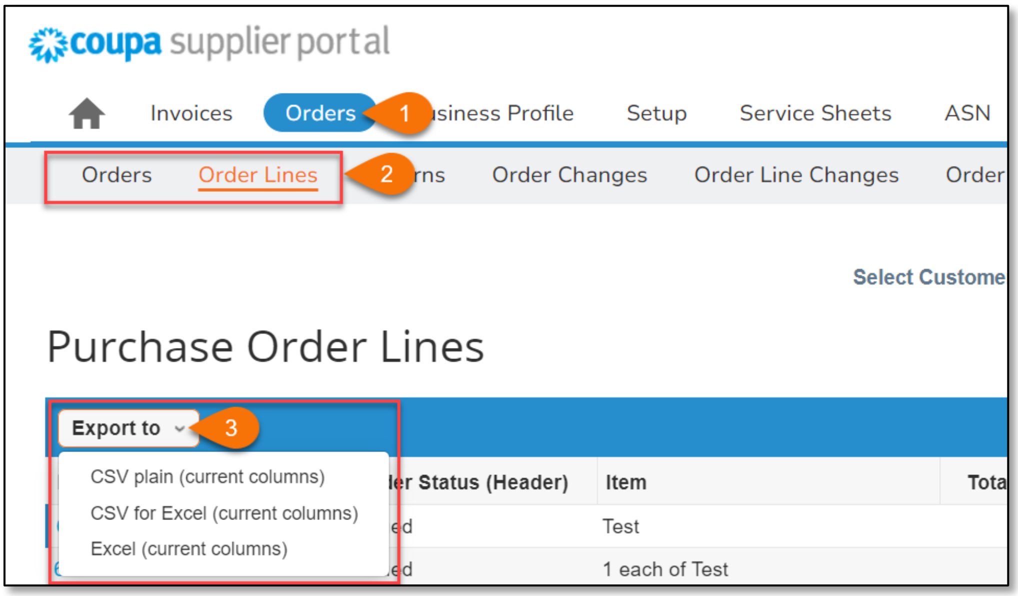
  Pending Approval: The invoice is currently under review.

  Voided / Disputed: There is an issue with the invoice. Please refer to the dispute email or note for further information and any required actions.

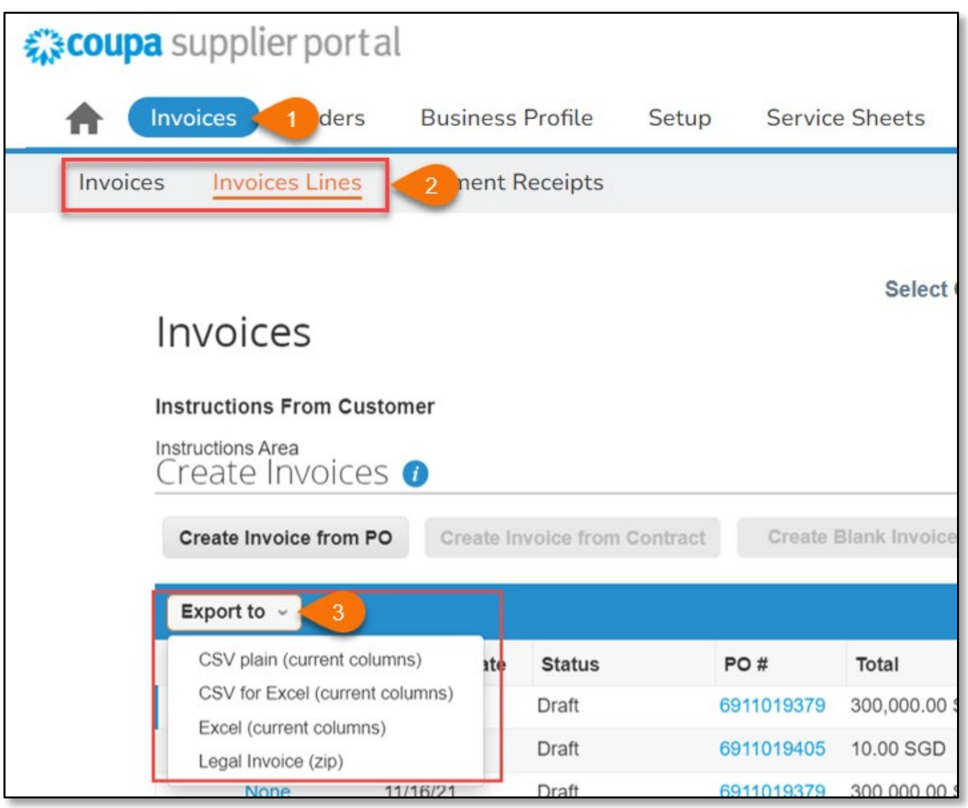
  Approved: The invoice has been accepted for payment.

9.0 How to Export List of Orders and Invoices Report to Excel

- You can export your list of purchase orders and invoices as a CSV or Excel report. For the purchase orders report, navigate to the Orders or Order Lines sub-tab.



- To generate an invoices report, go to either Invoices tab or Invoices Lines tab.



Appendices	
Appendix A	Guidelines for Creating Invoices and Credit Notes

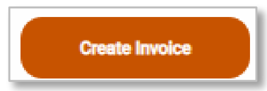
Invoices

- Invoices can only have positive value (+).

For CSP:

- Invoice can be created by:
  - Selecting the yellow coins by the PO 
  - Selecting "Create Invoice" when you have clicked into the PO 

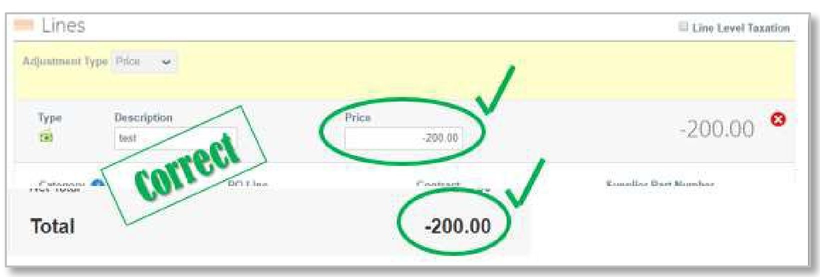
For SAN:

- Invoice can be created by:
  - Selecting "Create Invoice" from the PO email 

Credit Notes

For CSP:

- Credit notes can only be created using CSP by selecting the red coins by the PO 
- Credit notes must always have a negative value (–).
  - For quantity-based POs, the quantity must be negative (–) and the price positive (+) to ensure the total is negative (–).
  - For amount-based POs (no quantity option), the price must be negative (–) to ensure the total is negative (–).

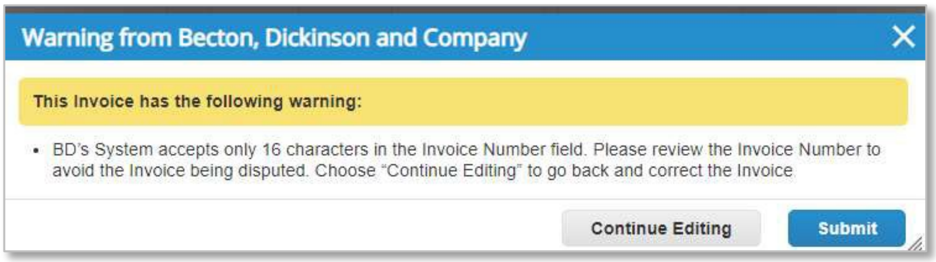


Appendices	
Appendix A	Guidelines for Creating Invoices and Credit Notes

<u>Both Invoices and Credit Notes</u>

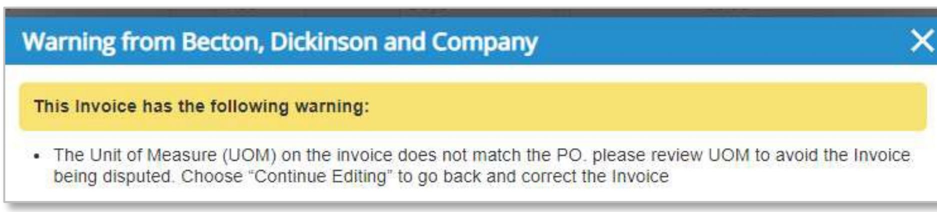
Length

- The Invoice/Credit Note number field is limited to 16 characters.
  - Please **DO NOT** ignore the warning message that appears on the screen.



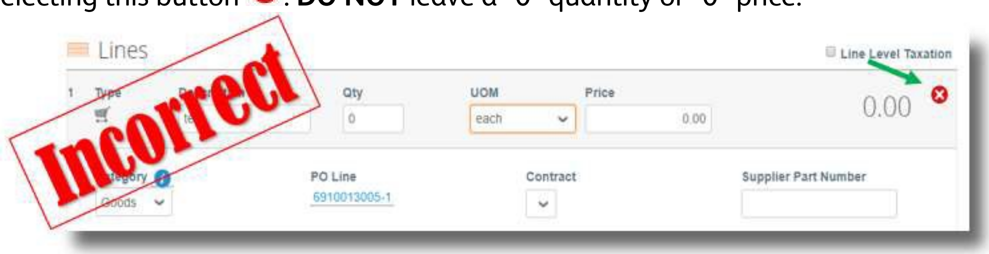
Unit of Measure (UOM) & Currency

- The **UOM and currency** must be consistent with the original PO.
  - Please **DO NOT** ignore the warning message that appears on the screen.



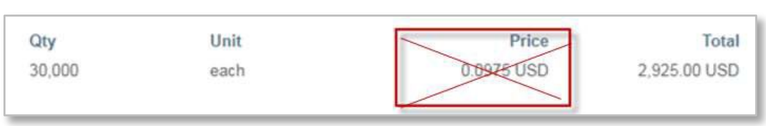
Lines

- If the Invoice/Credit Note does not include one of the lines on a PO, please **DELETE** the line by selecting this button. **DO NOT** leave a "0" quantity or "0" price.



Decimal Place

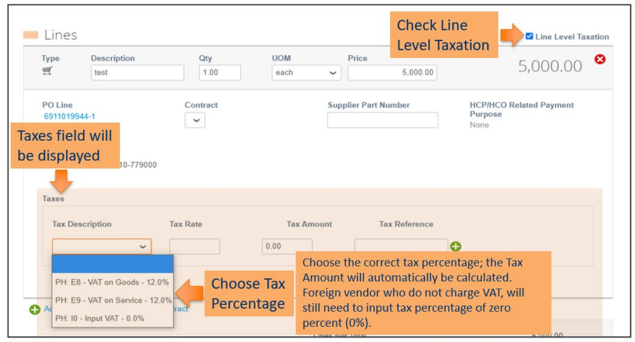
- BD allows pricing only up to two decimal places.



Both Invoices / Credit Notes – continued

Tax

- Select the correct tax percentage for each invoice line in the "Taxes" field.
- If the tax rate is 0%, select the 0% code; do not leave it blank.
- If the "Taxes" field does not appear, click the "Line Level Taxation" checkbox located at the upper right of the Lines field.



Miscellaneous and Handling

- "Miscellaneous" or "Handling Charges" are not allowed.

Shipping

- Enter any shipping and handling charges in the "Shipping" field.

  Note:

  Suppliers should use one of BD's shipping accounts for all standard deliveries. Please contact your BD buyers for more information.

Appendices	
Appendix B	FAQ – Frequently Asked Questions

Log In/Access/Notifications

- ❑ **How much does it cost to join?**
  It's free! There is no cost for registration and usage of Coupa Supplier Portal (CSP).

- ❑ **Where do I sign in?**
  Sign in at https://supplier.coupahost.com/ (Please use Google Chrome).

- ❑ **What do we do if we forgot our password?**
  Select 'Forgot username or password?' and follow the reset process.

- ❑ **Can more than one person receive access to my company's CSP account?**
  Yes, multiple users can be provided access by your company's CSP admin.

- ❑ **How do suppliers add additional employees?**
  Click on **Setup**, then select **Admin** from the menu. Choose the **Users** tab and click **Invite User**. Provide the required information in the window that opens.

- ❑ **I cannot view PO's or submit invoices within CSP.**
  Contact your company's CSP Admin; they can review your access permissions.

Purchase Orders

- ❑ **How do I see my BD purchase orders?**
  Click on **Orders** in the menu. If you are connected to more than one Coupa customer, select **Becton, Dickinson & Company** from customer dropdown menu.

- ❑ **What if the pricing is incorrect on the PO even after confirmation?**
  If you find that the pricing, quantity, or any other information on the PO is incorrect after confirmation, you can contact the respective purchasing specialist or buyer and use the comment feature in Coupa to communicate with BD.

- ❑ **I am not receiving email notifications when a PO is Received.**
  You can update your notification preferences through your CSP account settings by selecting the "PO is Received" checkbox.

- ❑ **Can I set it so I can only see purchase orders that haven't been invoiced yet?**
  Yes. In the **Purchase Orders** table, select "Orders not invoiced" from the **View** dropdown.

- ❑ **How do I change a price on a purchase order?**
  You cannot change a price on a PO through the CSP. If you need a change order on a PO, talk to your BD user/buyer with proper justification.

Appendices	
Appendix B	FAQ – Frequently Asked Questions

Invoices

- **Where does the invoice number come from?**
  The invoice number is generated by the supplier's system and entered into the CSP. Upon creating the invoice, suppliers must update the Invoice Number text field, which has a limit of 16 characters.

- **How do I invoice a blanket purchase order?**
  You can invoice multiple times against a single PO. Just click the yellow coins icon for the PO as you normally would and enter the amount to invoice. The next time you want to invoice against the PO, just do the same thing.

- **Can I reuse an invoice number once my customer has "Disputed" it?**
  You cannot reuse an invoice number for compliance invoice, even if the BD AP processor has disputed or voided the invoice.

- **Once an invoice has been approved, what do I need to do next?**
  Nothing. The invoice is in your customer's queue, and you will be paid based on the agreed payment terms/schedule.

- **What if I have an invoice that hasn't been paid?**
  For any payment-related inquiries, please submit a ticket via the BD Services Store. Our customer service team will respond to your query and provide the necessary information.

- **How do I create an invoice if the PO amount/quantity is insufficient?**
  If the PO's "need by date" is still valid but the PO has reached its limit.
  a) Supplier should contact BD user to revise the PO amount/quantity.
  b) The user will revise the PO amount/quantity and route it for internal approval, attaching the new justification.
  c) BD buyer will review and approve the change.
  d) A revised copy of the PO will be sent to the supplier.

  If the PO's "need by date" has expired and PO has reached its limit.
  a) Supplier should contact BD user and request a new PO before submitting the invoice.
  b) Once a new PO is created, the supplier should submit the invoice with the new PO number.
  c) The supplier should submit the invoice via Coupa Supplier Portal.

  Example:
  Supplier's invoice total amount: USD 6,000.
  i) Existing PO#123 balance amount: $5,000
  Supplier to issue invoice INV111 with total: $5,000
  ii) BD Buyer to issue new PO#124 with amount: $1,000
  Supplier to create new Invoice INV112 with reference to the new PO number with

Reference

(Coupa Compass, n.d.). *Getting Started with the Coupa Supplier Portal.* Retrieved May 10, 2022 from https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal