KANTAR

How to Create Invoices in Coupa

There are two- ways of creating invoices in Coupa:

- Through your Orders – see page 2

- Through your Invoices – see page 6

Coupa Supplier Enablement

Create an invoice from Orders

1. Go to the Orders tab

2. If there are any POs created, they will be listed below.

POs can have the following status:

- Issued

- Soft Closed

- Closed

- Cancel

If the status is Issued, the PO can be used to create an invoice.

If any other status is displayed, please contact your Business Partner within Kantar, so they can reopen or provide a new PO.

KANTAR

Create an invoice from Orders

1. Click on the gold coins under **Actions** and it will open the screen to create the invoice. Alternatively, you can click on the PO number. For more information on how to proceed from there, go to page 10

2. Under **General Info**, fill in the **Invoice #,** as per the number on your system

3. If you have a document (PDF) issued from your system, attach it under **Attachments**, **File**

4. Under **From**, all the Fields marked with a red ***** should be filled

Please make sure, bank details are also there, not only addresses.

KANTAR

Create an invoice from Orders

The invoice number must be unique. If the invoice number was never used, a green check will appear. If the number is repeated a red sign will appear. Please make sure you are not invoicing twice the same invoice

Once this is all filled in, please scroll down to **Lines.**

Under **Lines**, you will see the **Description** and **Price**.
If the invoice is for the total amount of the PO, no change is needed. If it's a partial invoice, please change the amount under Price.

Fill in the **VAT Rate.** VAT Rates will appear according to the country you are invoicing from.

Create an invoice from Orders

The VAT Rate is calculated based on the percentage and is automatically displayed.

To make sure the amounts are the same on your invoice and Coupa, click **Calculate.**

If everything is correct, click **Submit**.

Not sure if it is correct and need more clarification? Click **Save as Draft.**

Invoice entered by mistake? **Delete** or **Cancel.**

KANTAR

Create an invoice from Invoices

1. Go to the tab Invoices
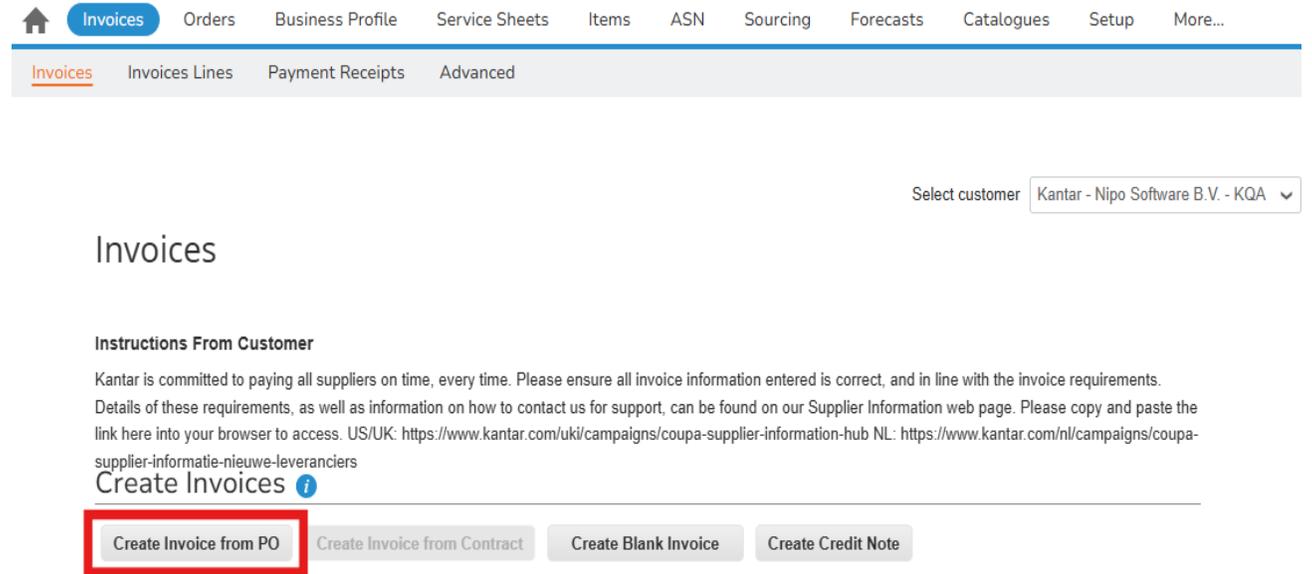
2. Go to "Create Invoice from PO"

   If there are any POs created, they will appear listed below.

POs can have the following status:

- Issued
- Soft Closed
- Closed
- Cancel

If the status is Issued, PO can be used to create an invoice

If any other of the status is displayed, please contact your

Business Partner within Kantar, so they can provide a new PO.

Invoices | Orders | Business Profile | Service Sheets | Items | ASN | Sourcing | Forecasts | Catalogues | Setup | More...

Invoices | Invoices Lines | Payment Receipts | Advanced

Select customer | Kantar - Nipo Software B.V. - KQA

Invoices

Instructions From Customer

Kantar is committed to paying all suppliers on time, every time. Please ensure all invoice information entered is correct, and in line with the invoice requirements. Details of these requirements, as well as information on how to contact us for support, can be found on our Supplier Information web page. Please copy and paste the link here into your browser to access. US/UK: https://www.kantar.com/uki/campaigns/coupa-supplier-information-hub NL: https://www.kantar.com/nl/campaigns/coupa-supplier-informatie-nieuwe-leveranciers

Create Invoices ⓘ

[Create Invoice from PO] [Create Invoice from Contract] [Create Blank Invoice] [Create Credit Note]

Create an invoice from Invoices

1. Click on the gold coins under **Actions** and it will open the screen to create the invoice. Alternatively, you can click on the PO number. For more information on how to proceed from there, go to page 10

2. Under **General Info**, fill in the **Invoice #,** as per the number on your system

3. If you have a document (PDF) issued from your system, attach it under **Attachments**, **File**

4. Under **From**, all the Fields marked with a red * should be filled

Please make sure, bank details are also there, not only addresses.

KANTAR

Create an invoice from Invoices

The invoice number must be unique. If the invoice number was never used, a green check will appear. If the number is repeated a red sign will appear. Please make sure you are not invoicing twice the same invoice

Once this is all filled in, please scroll down to **Lines.**

Under **Lines**, you will see the **Description** and **Price**.
If the invoice is for the total amount of the PO, no change is needed. If it's a partial invoice, please change the amount under Price.

Fill in the **VAT Rate.** VAT Rates will appear according to the country you are invoicing from.

Create an invoice from Invoices

The VAT Rate is calculated based on the percentage and is automatically displayed.

To make sure the amounts are the same on your invoice and Coupa, click **Calculate.**

If everything is correct, click **Submit**.

Not sure if it is correct and need more clarification? Click **Save as Draft.**

Invoice entered by mistake? **Delete** or **Cancel.**

Create an invoice Clicking on the PO Number

1. Click on the PO number in blue

2. A page with the PO information will be loaded

Under this page, you can also acknowledge that the PO

was received. Just tick the box in front of **Acknowledged**.

KANTAR

Create an invoice Clicking on the PO Number

3. Scroll down until you find the button where it says **Create Invoice**

The next steps of creating an invoice can be found on page 3 staring on step 2 or page 7 also starting on step 2.

If you still have any issues, please contact us at coupasupplierenablement@kantar.com

KANTAR