

# LEAR E-INVOICING SUPPLIER USER GUIDE

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July 2024



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A blurred image of a dark-colored car moving from left to right, with a red light streak visible on its side. The background is a hazy, overcast sky.

# COUPA INTRODUCTION & E-INVOICING



# GOING TOWARDS IN E-INVOICING

*Join us in becoming more digital & efficient!*



Lear Electronic  
PO's → Suppliers  
(Implemented in  
all Lear locations)



Coupa Supplier  
Portal Registration  
Required by each  
Supplier



Suppliers  
Electronic  
Invoices → Lear  
**(NEW!!)**



# LEAR & COUPA PRODUCT OVERVIEW



E-Procurement  
Digital Platform



Coupa is a market leading cloud based software used by many organizations for electronic **Purchase Orders & Invoice transactions**



**Increased efficiency and collaboration with Lear Locations and Supply base**



Coupa Supplier Portal is **free of charge & registration is required for all suppliers** for easy access to Purchase Orders & direct E-Invoicing



Once registered you will be ready to benefit from a **highly automated & intuitive system with instant business spend/payment transparency**



# E-INVOICING ROLL-OUT & LEAR HELPDESK

## → LOCATION WHERE E-INVOICING IS IMPLEMENTED:

United Kingdom, Spain, France, Czech Republic, Belgium, Portugal, Germany, Slovakia, Sweden and Morocco

### Key Contacts:

**Lear Supplier Helpdesk:** [EUCoupaSupplierSupport@lear.com](mailto:EUCoupaSupplierSupport@lear.com)

**Lear Buyer:** Your Lear Buyer contact



# HOW WILL YOU BENEFIT FROM THIS?

- ✓ *Electronic **Purchase Orders** available now*
- ✓ *Increase **efficiency** by reducing manual handling*
- ✓ *Instant **visibility** to Purchase Orders & Sourcing Events*



- ✓ *Coming soon **Electronic Invoicing***
- ✓ *Possibility to **electronically create invoices** via a **Portal***
- ✓ *Increased **accuracy** by using **PO data** to create invoices*





**COUPA SUPPLIER PORTAL  
INVITATION & REGISTRATION**



# SUPPLIER PORTAL CONNECTION PROCESS

- ❑ Using our stored contact information, we shall **send you an invitation to connect and register to the Coupa Supplier Portal**
- ❑ Use **PO Email/Primary Contact** as our main '**Admin**' contact – This person can assign access/responsibilities to others
- ❑ It is important you **act quickly** and connect to the **Supplier Coupa Portal** to get full **benefit of this digital communication**

An **automated email invitation** shall be sent to the **Primary Contact/PO Email** for joining the supplier portal. - - Check your junk/spam folders

- Receive/view Electronic PO's
- Acknowledge PO's
- **Create and Submit Invoices**
- View/Monitor PO, Receipt, Invoice & Payment Status all within the Portal



Ensure we have your latest contact details (primary contact). This person shall act as the **CSP administrator** for other members

- Send any updates to, **XXXXXXXX@Lear.com**

Register & complete account set up

- Update Profile
- **Enable E-Invoicing**
- Legal Entity, **Remit To** and Ship From information
- Add & Manage Users
- Merge Accounts (multi-location supply)





# INVITATION TO COUPA SUPPLIER PORTAL (CSP)

- Below is a sample of the invitation letter that will come from Coupa Supplier Portal [do\\_not\\_reply@supplier.coupahost.com](mailto:do_not_reply@supplier.coupahost.com)
- Please alert your teams to keep a look out for this invitation and act upon it when it is received
- Click on the link “Join Coupa” at the bottom of the email invitation for CSP account registration or forward to any other user who will be the administrator.



Please note you shall receive this invitation before we go-live in your location so you can register and get familiar with the portal and view the training.

 Lear Corporation      Registration Instructions - Action Required

Powered by 

Hello 141N\_UK Test Ltd\_30765,


We handle all our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.

Jerrick Jan Vargas

[Join Coupa](#)      [Forward this invitation](#)

### Invoices

Create Invoices 

[Create Invoice from PO](#)      [Create Invoice from Contract](#)      [Create Blank Invoice](#)      [Create Credit Note](#)

Export to       View  All  Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
-----------	--------------	--------	------	-------	---------------------	---------



# REGISTRATION ON COUPA SUPPLIER PORTAL (CSP)



## Create an Account

Welcome on Coupa Supplier Portal

We use Coupa to manage purchase orders, invoices, and communicate with our suppliers. We'll walk you through a quick and easy setup for your account, so we're ready to do business together.

If you will have any questions please contact your regional Lear Helpdesk.

Lear Coupa Admin Team

**Business Name**  
140\_GBR Test Supplier Ltd\_59999  
Your legal business name (or legal personal name if an individual)

**Email**  
testcoupasupplierportal@gmail.com

**First Name** CUSTOMER      **Last Name** SERVICE

**Password** .....      **Confirm Password** .....

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

I accept the [Privacy Policy](#) and the [Terms of Use](#)

**Create an Account**

Already have an account? [LOG IN](#)

[Forward this to someone](#)

- You will be automatically redirected to Coupa Supplier Portal account registration page
- Complete the required remaining information to register your linked CSP account
- **Please note:** The banking information provided during the Coupa Registration is optional, this information is NOT automatically transferred to Lear's Corporate Payment System. If you need to update your payment data, please reach out to your Lear Purchasing Buyer.



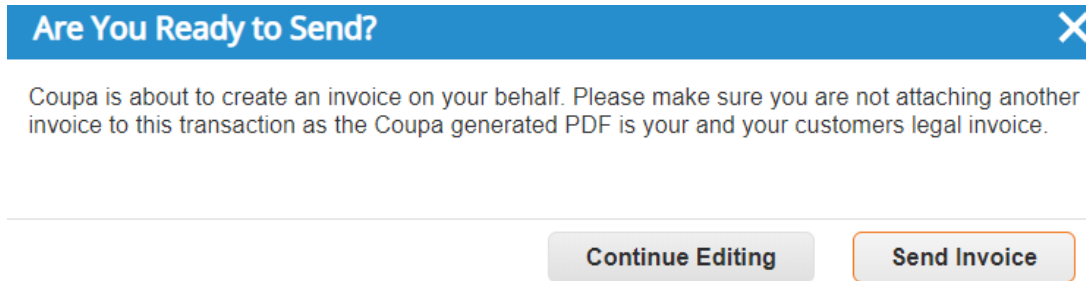
**Recommendation:** to avoid receiving Coupa Supplier Portal or Sourcing Event invitations to SPAM, add [do\\_not\\_reply@lear.coupahost.com](mailto:do_not_reply@lear.coupahost.com) e-mail address to your **whitelist**



# DIFFERENCE IN E-INVOICE TEMPLATES

- There are two different types of e-invoice templates in the portal when you are processing an invoice,
  1. **Standard e-Invoice** – in this case you have to provide as an attachment your pdf invoice to the template
  2. **Country Compliant e-Invoice** – In this instance Coupa is creating a legal invoice on your behalf (see below),

For a **Country Compliant template** – you will see below when you go to submit an invoice via the portal



On the actual Invoice you will also see this symbol indicating it is a **Country Compliant template**



A blurred image of a dark-colored car moving from left to right, with a red light streak visible on its side. The background is a dark, hazy landscape.

# COUPA SUPPLIER PORTAL SUPPLIER PROFILE & ACCOUNT SET UP



# UPDATING YOUR SUPPLIER PROFILE

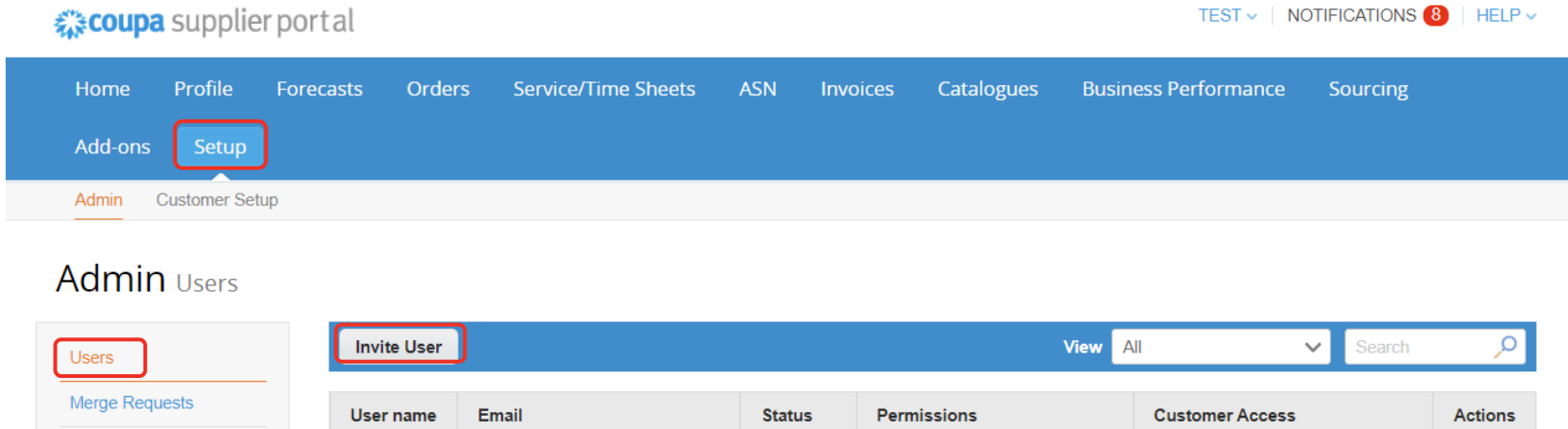
- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Public Profile information, which will be available for all Coupa customers/users
- Select **Profile** from the top menu bar

The screenshot shows the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile' (highlighted with a red box), 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', and 'Sourcing'. Below the navigation bar, the main content area displays the 'Test Supplier' profile page. The profile progress is shown as 24% complete, with a 'View Profile' link. A yellow banner at the top right of the profile page reads 'Complete your profile to get discovered by Coupa buyers that are looking for items in your category.' Below this, the profile name 'Test Supplier' is displayed with a progress bar and an 'Edit Profile' button (highlighted with a red box). The 'Announcements' section shows 'No Announcements'. The 'Recent Activity' section shows a link to 'Lear Corporation TEST - 253\_DEU...' and a 'More...' button. At the bottom, there are four sections: 'Two-factor Security' (1 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (10 Connections).

- Click Edit Profile
- Confirm existing company information and complete any missing fields in at least the General Information, Address, Primary Contact sections
- Required fields are marked with an asterisk
- Click Save when finished

# UPDATING THE ADMIN SETTINGS

- Once registered in CSP you can easily manage User access for your team and update credentials with your Admin role
- To invite users from your team into CSP click **Admin** from the top menu bar



The screenshot shows the Coupa Supplier Portal interface. At the top, the logo and navigation menu are visible. The 'Setup' button in the 'Add-ons' section is highlighted with a red box. Below the navigation bar, the 'Admin Users' section is displayed. On the left, there are buttons for 'Users' (highlighted with a red box) and 'Merge Requests'. On the right, there is an 'Invite User' button (highlighted with a red box), a 'View' dropdown menu set to 'All', and a search bar. Below these elements is a table with the following columns: 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'.



**This is where you as Admin can add other Users to this account to perform specific tasks and restrict access based on specific roles (see next slide)**



# ADDING USERS

## Invite User

From the top menu bar, select Admin, then click Invite User

Enter employee's email address in the Invite User popup window and click Send Invitation

First Name

Last Name

\* Email

### Permissions

### Customers

- All
  - Admin
  - Orders
    - Restricted Access to Orders
    - All
  - Invoices
  - Catalogs
  - Profiles
  - ASNs
  - Service/Time Sheets
    - Restricted Access to Service/Time Sheets
    - All
  - Payments
  - Order Changes
  - Pay Me Now
- All
  - Lear Corporation

Cancel

Send Invitation

### Additionally:

- You can restrict access to specific customers by checking/unchecking customer name boxes in the user table
- You can deactivate a user by clicking the **Deactivate user** icon



# EDITING USERS

You can edit and manage individual user access at any time

- From the top menu bar, select Admin, then click Edit under the desired User's name

## Admin Users

Users

Customer Service  
learvendor008@gmail.com

Edit

- Modify the specific permissions and customer access by checking/unchecking respective boxes in the popup window user table
- Click **Save** when finished

## Edit user access for Customer Service

### User info

\* First Name

\* Last Name

\* Email

### Permissions ?

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Pay Me Now

### Customers

All

Lear Corporation

Cancel

Deactivate User

Save



# IMPORTANT! ENABLING E-INVOICING (REMIT-TO)

You need to add Legal Entity information, as well as Remit-To and Ship From Addresses to enable E-Invoicing.

At least one Remit To address must be registered on your account. Coupa will default to that address and there will be no popup to choose an address if not you will need to create Remit-To each time when invoice has to be created.

## Admin Users



The screenshot shows the 'Admin Users' page. On the left, there is a sidebar menu with 'Users' selected, and 'Legal Entity Setup' is highlighted with a red box. A red arrow points from the 'Add Legal Entity' button in the 'Users' card to the right. The main content area shows a form titled 'Where's your business located?' with a yellow informational box and a form with fields for 'Legal Entity Name' and 'Country' (set to Germany). A 'Continue' button is visible at the bottom right.

- Click the **Admin** from the top menu bar, then select **Legal Entity Setup** from the menu on the left
- Click **Add Legal Entity**
- Enter the Legal Entity information, then complete the Remit-To and Ship-From Addresses
- Click **Save** when finished



**Remit To data has to be accurate – On your first invoice submission or any new Remit To address added to the portal – Lear shall validate Remit To with our internal records in Coupa. You shall be notified of any significant mis-match and contact your Lear Purchasing person for Remit To updates in the ERP**



A blurred image of a dark-colored car moving from left to right, with a red light streak visible on its side. The background is a hazy, overcast sky.

# INVOICING VIA COUPA SUPPLIER PORTAL



# CREATE AN INVOICE VIA CSP

- You can create invoices directly from POs in the CSP, often referred to as “flipping the PO” or a “PO Flip”
- Click **Orders** from the top menu bar

The screenshot shows the CSP interface. On the left, a blue navigation bar contains 'Home', 'Profile', and 'Orders'. A red arrow points from the 'Orders' button to a table. Above the table, text reads 'Find the PO for which you would like to flip in to an invoice'. The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. A red box highlights a yellow coin stack icon in the Actions column of the first row.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
PK432665	04/27/20	Issued	None	1 Each of test item 1 Each of test item	No	69.00 EUR		

- Under the **Actions** column of the specific PO row, select the **yellow coin stack icon** to flip the PO into an invoice
- The page will refresh to display the create invoice screen

The screenshot shows a 'Choose Invoicing Details' popup form. It contains several fields with dropdown menus and 'Add New' buttons:

- \* Legal Entity: New Copany (+ Add New)
- Invoice From: New Stree 3, 123546 Kenitra, Morocco (MA987654321)
- \* Remit-To: New Stree 3, 123546 Kenitra, MA (+ Add New)
- \* Ship From Address: New Stree 3, 123546 Kenitra, MA (+ Add New)

At the bottom right, there are 'Cancel' and 'Save' buttons.

- If you have more than one Remit-To Address in your CSP profile, the Choose Remit-To Address popup will display. select the Remit-To Address from a drop down and **Save**  
If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no popup to select an address.
- If the correct Remit-To Address that you need to invoice Lear does not appear, click **Add New\***



# CREATE AN INVOICE VIA CSP

## COUNTRY COMPLIANT INVOICE

- On the invoice creation screen, complete all necessary information (all required fields are indicated with an ✖ )
  - Use your own invoice numbering convention for the **Invoice #** field
  - Invoice date should also come from your original invoice
  - Verify auto populated invoice information at the header and line level and adjust as necessary
  - Details from the PO are automatically populated to the invoice draft

Create Invoice Create

**General Info**

\* Invoice #  ✓

\* Invoice Date  📅

Payment Term

Date of Supply  📅

\* Currency

Delivery Number

Status

Image Scan  No file chosen

Supplier Note

Attachments **+** Add File | URL | Text

Option out of Cash Accounting Scheme

Late Payment Penalties

Margin Scheme

Pre-Payment Date  📅

**From**

\* Supplier

\* Supplier VAT ID

\* Invoice From Address  📍

Limited, France

\* Remit-To Address  📍

\* Ship From Address  📍

**To**

Customer

\* Bill To Address  📍

\* Buyer VAT ID

Ship To Address  📍

Scheduled Payment Date

### For a Goods PO

- Check **Price** and the **Quantity** are they according to PO and agreement with Customer

**Lines**  Line Level Taxation

Type	Description	Qty	UOM	Price	
test item		1.000000	Each	46.00	46.00 ✖

PO Line  Contract  Period  Supplier Part Number

### For a Services PO

- Check the **Price** is it according to PO and agreement with Customer

**Lines**  Line Level Taxation

Type	Description	Price	
Testing Amount Based		5,000.00	5,000.00 ✖



*You are able to add multiple invoice attachments and partially invoice, so do as necessary to fit your organization's invoicing needs and capabilities.*



# CREATE AN INVOICE VIA CSP

## COUNTRY COMPLIANT INVOICE

- Add VAT Rate to each line
- If applicable, any additional shipping and tax information will be routed for additional approvals
  1. In invoice **summary level**, select applicable tax percentage from drop down

Type	Description	Qty	UOM	Price	
	INVOICING ITEM TEST	5.000000	Each	12.50	62.50

PO Line: D6-433448-1  
Contract:   
Supplier part number:

Billing: 2191-ABOVEGROUND CONVEYOR SERVICE-68720-DUMMY

VAT Rate	VAT Amount	Tax Reference
5.0% <input type="text"/>	3.13	<input type="text"/>



# CREATE AN INVOICE VIA CSP

## COUNTRY COMPLIANT INVOICE

If you are choosing Tax Rate “Exempt” for goods and services relating to Intra EU trade, make sure it will be selected at line level (Header level for any additional shipping costs added to the invoice)



VAT Rate	VAT Amount
23.0%	0.00
8.0%	
5.0%	
0.0%	
<b>Exempt</b>	
Reverse Charge	

In order for Intra EU supplies to be exempted from VAT and for Lear to be able to apply the reverse charge mechanism, a Tax reference needs to be made to the correct EU article for goods or services. Once you will choose Tax rate “Exempt” you also must enter a tax reference. An invoice cannot be submitted without this. The description can be populated by clicking on the Tax Reference field, pressing a character on the keyboard, for example “.”. The two relevant EU articles will be shown, select the appropriate reference depending on whether the invoice line relates to goods or services.

VAT Rate	VAT Amount	Tax Reference
Exempt	0.00	.

EU Supply Of Services - Poland - Services - Not subject to VAT, Reverse charge Arts, 44/196 EU VAT Directive  
EU Supply Of Goods - Poland - Goods - VAT zero rate intracommunity supply of goods Art, 138 EU VAT Directive

VAT Rate	VAT Amount	Tax Reference
Exempt	0.00	EU Supply Of Goods - P



# CREATE AN INVOICE VIA CSP

## COUNTRY COMPLIANT INVOICE

For Cross-border trade (Non-EU related), then tax rate 0.0% should be used and no Tax Reference is required.

The screenshot shows the 'Taxes' section of the CSP interface. It features a 'VAT Rate' dropdown menu and a 'VAT Amount' input field. The dropdown menu is open, displaying the following options: 23.0%, 8.0%, 5.0%, 0.0% (which is highlighted in blue), Exempt, and Reverse Charge. The VAT Amount field contains the value 0.00.

- Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Lear, then click Add Comment
- Submit the invoice

Total Taxes

Lines Net Total	1,062.50
Lines VAT Totals	3.13
Shipping <input type="text"/>	
VAT	<input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Total VAT 3.13	
Net Total 1,062.50	
<b>Gross Total</b>	<b>1,065.63</b>

Delete Cancel Save as draft **Calculate** **Submit**



# CREATE AN INVOICE VIA CSP

## NON-COUNTRY COMPLIANT INVOICE

- On the invoice creation screen, complete all necessary information (all required fields are indicated with an \* )
  - Use your own invoice numbering convention for the **Invoice #** field
  - **Add** your invoice in pdf, as an attachment
  - Verify auto populated invoice information at the header and line level and adjust as necessary
  - Details from the PO are automatically populated to the invoice draft

Create Invoice Create

General Info From

\* Invoice #  ✓

\* Invoice Date

Payment Term

Date of Supply

\* Currency

Delivery Number

Status

Shipping Term

Image Scan  No file chosen

Supplier Note

\* Attachments  |  |

Exchange Rate

\* Supplier

Supplier Tax ID

\* Invoice From Address

\* Remit-To Address

\* Ship From Address

To

Customer

Bill To Address

Buyer Tax ID

Ship To Address



*You are able to add multiple invoice attachments and partially invoice, so do as necessary to fit your organization's invoicing needs and capabilities.*



# CREATE AN INVOICE VIA CSP

- Add Tax in Total&Taxes section which refers to lines
- If applicable, any additional shipping and tax information will be routed for additional approvals
  1. In invoice **summary level**, select applicable tax percentage from drop down
- Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Lear, then click **Add Comment**

Lines  Line Level Taxation

Type	Description	Qty	UOM	Price	
	Morocco_Test_290620	12.000000	Each	50.00	600.00 <span style="color: red;">✖</span>

PO Line: [PK433487-1](#) Contract:  Supplier Part Number:

Billing: HR01-OFFICE FURNITURE-61253000

Totals & Taxes

Lines Net Total	1,050.00
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
<span style="color: green;">+</span> Tax Reference	<input type="text" value="Enter a tax reason description."/>
Tax	<input type="text"/> 5 % <input type="text"/> 52.50
<span style="color: green;">+</span>	
Total Tax	52.50
Net Total	1,050.00
<b>Total</b>	<b>1,102.50</b>



# CREATE AN INVOICE VIA CSP

- **Submit** when you have completed all information on the invoice, a popup will appear to confirm if you are ready to send the invoice since invoices cannot be changed via email or CSP once submitted
- If you wish to go back to edit, click **Continue Editing**
- Click **Send Invoice** to send the confirmed complete invoice to Lear

Are You Ready to Send?



You're about to send an invoice to Lear Corporation for a total amount of 69.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing

Send Invoice

Lear will dispute (automatically) any invoice that is:

- Does not match with the PO's **currency**
- Exceeds the PO **quantity**
- Exceeds the PO **unit price** (For quantity based POs)
- Exceeds the PO **amount** (For amount based POs)
- Has a different **Unit of Measure (UOM)** than the PO line

If you exceed any of Lear's defined tolerance limits, your invoice will be automatically disputed



In case you try to submit an invoice that is not aligned with the above rules, you will receive a submission warning, in that case do not submit your invoice or it will be disputed automatically. Contact your Lear buyer if a PO amendment is required.

Warning from Lear Corporation



This invoice has the following warnings:

- You are about to submit an invoice for a higher quantity than authorized by the purchase order. Please correct or contact your Lear buyer. Otherwise, your invoice will be disputed.
- You are about to submit an invoice for a higher price than authorized by the purchase order. Please correct or contact your Lear buyer. Your invoice will be set to disputed if you continue.

Continue Editing

Submit



# CREATE AN INVOICE VIA CSP


## INVOICE STATUS

- After submitting, the page will refresh to display that the invoice is processing
- To check the status of sent invoices at any time, click on the **Invoice** tab of the top menu bar and review the **Status** column for the invoice line

## Invoices

Create Invoices 

Buttons: [Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

Export to  View All  Search 

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
TestInvoice	04/28/20	Pending Approval	PK432665	69.00 EUR	No	

- After the invoice is approved and matched with the PO, the invoice will be paid according to Lear's standard payment terms, or to the payment terms contractually agreed upon between Lear and the supplier. Where possible payment details will be reflected in Coupa and the CSP.



# CREATE AN INVOICE VIA CSP

- To check the Scheduled payment date for an Invoice, click on the **Invoices** tab.
- Click on the Invoice number for the invoice that you would like to check
- On the left side, you will find the **Scheduled Payment Date where available**
- You also Can create a custom view to see the scheduled payment dates for more than one invoice in the same time

Invoices

Create Invoices ⓘ

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

Export to -   View Scheduled Payment Dat   Search

Invoice #	Created Date	Status	PO #	Total	Scheduled Payment Date	Unanswered Comments	Actions
UAT17 - MA	01/30/19	Approved	None	21,200.00 USD	02/04/19	No	
UAT14 - MCHD	01/22/19	Approved	US241434	10,600.00 USD	01/25/19	No	
UAT17 - MCHD	01/22/19	Approved	None	21,200.00 USD	01/25/19	No	
UAT14-MCA	01/22/19	Approved	US241431	10,600.00 USD	01/23/19	No	
UAT17-MS	01/22/19	Approved	None	21,200.00 USD	01/23/19	No	
UAT14-MVR	01/22/19	Approved	US241433	10,600.00 USD	01/23/19	No	
UAT17-SGB	01/22/19	Approved	None	21,200.00 USD	01/23/19	No	
UAT003-CN-nha	01/22/19	Approved	US241390	50,020.00 USD	01/23/19	No	
UAT003-002-nha	01/22/19	Approved	US241390	-70,035.00 EUR	01/23/19	No	

Select Customer   Lear Corporation

## Invoice #UAT17 - MA [Back](#)

Invoice #	UAT17 - MA	Supplier	NA_Pitney Bowes Inc_0000001528_USD
Invoice Date	01/30/19	Invoice From	None
Payment Term	None	Remit To	None
Currency	USD	Ship From	None
Delivery Number	None	Supplier Tax ID	None
Status	Approved	Customer	Lear Corporation
Shipping Term	None	Bill To Address	I4 PO Box 421729 Indianapolis, IN 46242 United States
Invoice PDF Document	<a href="#">download</a>	Buyer Tax ID	13-3386776
Image Scan	<a href="#">Dummy_Invoice.pdf</a>	Requester	None
Supplier Notes	None	Exchange Rate	None
Attachments	None	Scheduled Payment Date	02/04/19
		Estatus validacion	None



# DISPUTED INVOICE (WHAT IT MEANS AND HOW TO SOLVE IT)

## Different Required Action Depending on Invoice Type

→ **Standard e-Invoice:** Simply go to disputed invoice and void (adjusted invoice can be re-submitted)

If your invoice is disputed, you will receive an action e-mail and a notification in the CSP  
View Invoice, in order to start the resolving process

Invoice #TestInvoice2 is in dispute [Inbox x](#)

Lear Corporation <do\_not\_reply@lear-test.coupa.com>  
to me ▾

 Invoice #TestInvoice2 is in dispute

Powered by 

Hi,

Invoice TestInvoice2 has been disputed by Lear Corporation.

#### Dispute Reason(s)

- Price different from PO/Contract or Catalog
- Quantity different from PO/Contract or Catalog

Date: 2020-04-28

Additional Comments: ,

This invoice is available on the [Coupa Supplier Portal](#) to view and resolve. Resolving the disputed invoice would mean you are creating a corrected invoice. The corrected invoice can be submitted to Lear Corporation for review.

Resolving the disputed invoice links the corrected, and the disputed invoices. Unless you resolve the disputed invoice, Lear Corporation can choose to withdraw it from this status.

If you are a supplier using Coupa Invoicing in European countries, please note that to cancel an invoice you must first create and submit a credit note. If the prior invoice is canceled, you can create and submit a new invoice with a different number.

This process is recommended to comply with tax laws across all European countries, so that you do not expose yourself or your customer to any unnecessary risk as the invoice is corrected.

[View Online](#)



# ACTING ON DISPUTED E-INVOICE

## Non-Compliant Invoice


- Identify the problematic invoice and click the resolve option

### Invoices

Create Invoices ⓘ

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

Export to   View All   Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Invoice_CSP_Void	04/16/21	Disputed	CO434334	1,000.00 MAD	Yes	Price different from PO/Contract o Catalog	 Resolve

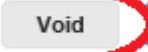

Coupa will display the possible option

Please review the invoice and determine the resolution option:

**Void**  
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

**Correct Invoice**  
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

- Scroll to the bottom and Void

  →

**Void Invoice** ✕

You have chosen to void this invoice in disputed status. Once voided, this invoice will be archived and will not be sent to the buyer team for review for payment. Please confirm if you would like to continue?

No   Yes

# ACTING ON DISPUTED E-INVOICE

## COMPLIANT INVOICE


The most practical option to solve a price, qty, or any data entry issues will be to use the cancel invoice adjustment feature, which will fully cancel the invoice and allow you to reenter correctly.

- Identify the disputed invoice and click the 'Resolve' action icon


### Invoices

Create Invoices 

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">Invoice_QTY_OVERCHARGE</a>	04/16/21	Disputed	CO433445	7,260.00 EUR	No	Quantity different from PO/Contract or Catalog	 Resolve

- Once the invoice opens, Coupa will display options they have to resolve

Please review the invoice and determine the resolution option: 

**Cancel Invoice**  
If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancellation credit note and a replacement invoice creation.

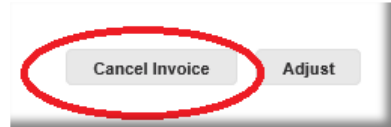
**Adjust**  
If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.



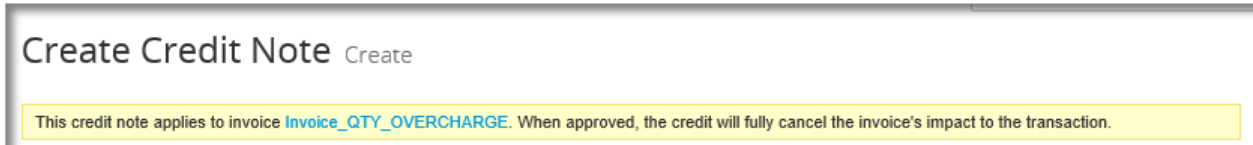
# ACTING ON DISPUTED E-INVOICE

## COMPLIANT INVOICE

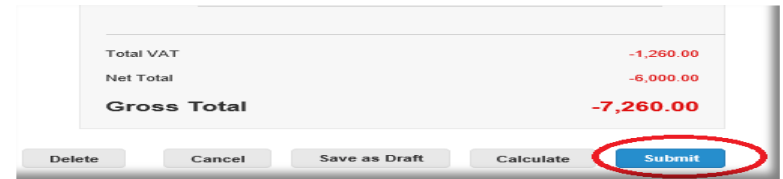
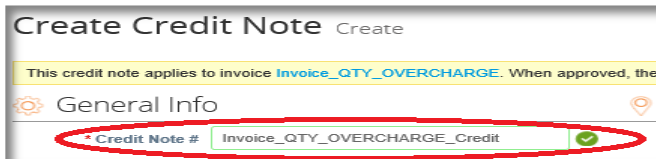
- Scroll to the bottom of the invoice and select the action



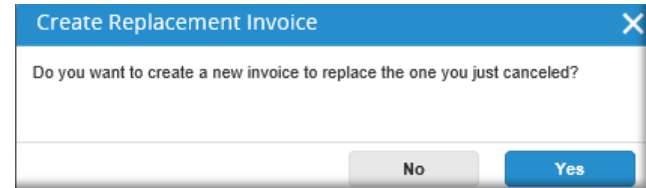
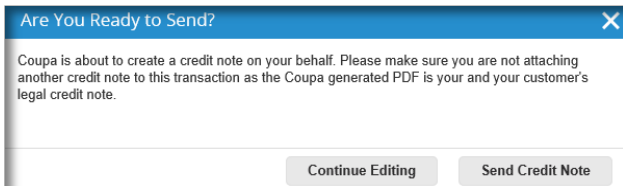
NOTE: Coupa will show, by way of the invoice header tag, what this credit will accomplish



- Enter the credit note number then scroll down and submit



Coupa will ask for confirmation to submit the credit and then provide the option to recreate



# ACTING ON DISPUTED E-INVOICE

## COMPLIANT INVOICE



- Create your corrected invoice

Note how again, the header tags are showing exactly what is happening




### Create Invoice Create

This invoice is a correction for invoice [Invoice\\_QTY\\_OVERCHARGE](#) that was canceled by credit note [Invoice\\_QTY\\_OVERCHARGE\\_Credit](#).

---

 **General Info**  **From**

---

<p>* Invoice # <input type="text" value="Invoice_QTY_Corrected"/> </p>	<p>* Supplier <input type="text" value="BYA_AKTRION IBERIA S.L._0000A045"/></p>
<p>* Invoice Date <input type="text" value="04/16/21"/> </p>	<p>* Supplier VAT ID <input type="text" value="ESB97134845"/> </p>



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# DIFFERENT STATUS EXPLANATION

- A supplier can view the following invoice statuses in the CSP:
  - **Draft:** Draft invoice that has not yet been submitted
  - **Processing:** Invoice that is between invoice being submitted by the supplier and the submission being recorded in Lear's instance
  - **Pending Approval:** Invoice undergoing any Lear-internal process to allow final approval. This could be pending receipt or pending approval.
  - **Approved:** Invoice that is approved and ready for payment as per the pay terms or immediately if overdue
  
  - **Disputed:** Invoice that is currently being disputed by Lear AP or auto disputed by the system.
    - Standard e-Invoice: Simply go to disputed invoice and void or correct invoice, adjusted invoice can be re-submitted
    - **Country Compliant e-Invoice:** We recommend the supplier to contact Lear AP team to abandon the invoice instead of issuing credit note. This releases the receipts from the original invoice and allows you to submit a new invoice.
  - **Abandoned:** See disputed, also an abandon invoice is no longer accessible. The status is visible to AP team and should not be used for accruals.
  - **Voided:** Invoice has been voided



A blurred image of a dark-colored car moving from left to right, with a red light streak visible on the side. The background is a dark, hazy landscape.

**INVOICING VIA EMAIL PO FLIP**  
(SUPPLIER ACTIONABLE NOTIFICATION – SAN)



# TRANSACTIONS IN COUPA VIA EMAIL

- With the help of Coupa suppliers will be able to quickly receive and acknowledge POs via email
- 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, so you will be able to:
  - ❖ Acknowledge the PO
  - ❖ Add a comment to the PO
  - ❖ Create an invoice from the PO (PO Flip)
  - ❖ Login to Coupa Supplier Portal (CSP)
  - ❖ Join Coupa Supplier Portal (CSP) in case you're not registered already
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal (even with other customers) can also take advantage of these actionable notifications



# EMAIL AND CSP ARE LINKED

- You will be notified of your Purchase Order from Lear via email and the CSP
- You can click **Login** in the acknowledgement email to check the order in the Coupa Supplier Portal

## Verify Your Access for Purchase Order #A1064922

Your access to this page has expired. Please click on the button below. You will receive an email with the one-time password (OTP), using which you can access this page.

[Generate One-Time Password](#)

Already have an account? [Log in](#)

# CREATE AN INVOICE VIA PO EMAIL

- You can create invoices directly from PO received via email, often referred to as “flipping the PO” or a “PO Flip”.
- Locate the PO emailed to you, which will show up as Coupa Notifications in your mailbox
- Click on Create Invoice on the PO view

**LEAR**  
CORPORATION

Lear Corporation Belgium CVA Purchase Order #A1064922

**Order Summary**

Date 17/08/2024  
PO Total 1,500.00 EUR  
Delivery Terms DDP  
Payment Terms X3\_ days net\_  
Contact Jerrick Jan Vargas

Manage Order Create Invoice

Orders details below

Acknowledge PO Add Delivery Tracking Add Comment



Please Note:  
If you are not registered into the portal  
you are forced to create Remit To  
address with every invoice entry

**Choose Invoice From Address** X

No Invoice From Addresses to choose from.

To add a new address click Create New Remit-To.

Cancel Create New Remit-To



# CREATE AN INVOICE VIA PO EMAIL

## COUNTRY COMPLIANT INVOICE

- On the invoice creation screen, complete all necessary information (all required fields are indicated with an ✖ )
  - Use your own invoice numbering convention for the **Invoice #** field
  - Invoice date should also come from your original invoice
  - Verify auto populated invoice information at the header and line level and adjust as necessary
  - Details from the PO are automatically populated to the invoice draft

Create Invoice Create

**General Info**

- Invoice #: Test Invoice 7
- Invoice Date: 05/04/20
- Payment Term: KM\_90 days end of month\_090EM
- Date of Supply: 05/04/20
- Currency: EUR
- Delivery Number: [Empty]
- Status: Draft
- Image Scan: Choose File (No file chosen)
- Supplier Note: [Empty]
- Attachments: Add File | URL | Text
- Option out of Cash Accounting Scheme: [Empty]
- Late Payment Penalties: [Empty]
- Margin Scheme: [Empty]
- Pre-Payment Date: m/m/dd/yy

**From**

- Supplier: KM\_New Supplier Morocco 2
- Supplier VAT ID: FR9X99999999
- Invoice From Address: New Company Ltd, Nice Street 4, 14268 Paris, France
- Remit-To Address: New Company Ltd, Nice Street 4, 14268 Paris, France
- Ship From Address: New Company Ltd, Nice Street 4, 14268 Paris, France
- Customer: Lear Corporation
- Bill To Address: Lot 102B/2 Tanger Free Zone, Route de Rabat, Tanger, Morocco
- Buyer VAT ID: 4906332
- Ship To Address: ATLANTIC FREE ZONE, Route Nationale 4, Lots 171-175 et 177-181, 14000 Kenitra, Morocco
- Scheduled Payment Date: None

### For a Goods PO

- Check **Price** and the **Quantity** are they according to PO and agreement with Customer

Type	Description	Qty	UOM	Price	
test item		1.000000	Each	46.00	46.00
PO Line	Contract	Period	Supplier Part Number		
PK432665-1		KM_CCE_July 2019			

### For a Services PO

- Check the **Price** is it according to PO and agreement with Customer

Type	Description	Price	
Testing Amount Based		5,000.00	5,000.00



*You are able to add multiple invoice attachments and partially invoice, so do as necessary to fit your organization's invoicing needs and capabilities.*



# CREATE AN INVOICE VIA PO EMAIL

## COUNTRY COMPLIANT INVOICE

- Add VAT Rate to each line
- If applicable, any additional shipping and tax information will be routed for additional approvals
  1. In invoice **summary level**, select applicable tax percentage from drop down
- Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Lear, then click **Add Comment**

Lines

Type	Description	Qty	UOM	Price	
	INVOICING ITEM TEST	5.000000	Each	12.50	62.50

PO Line: D6-433448-1  
Contract:   
Supplier part number:

Billing  
2191-ABOVEGROUND CONVEYOR SERVICE-68720-DUMMY

Taxes

VAT Rate	VAT Amount	Tax Reference
5.0% <input type="text"/>	3.13	<input type="text"/>

### Total Taxes

Lines Net Total	1,062.50
Lines VAT Totals	3.13
Shipping	<input type="text"/>
VAT	<input type="text"/> 0.000
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Total VAT	3.13
Net Total	1,062.50
<b>Gross Total</b>	<b>1,065.63</b>



# CREATE AN INVOICE VIA PO EMAIL

## NON COUNTRY COMPLIANT INVOICE

- On the invoice creation screen, complete all necessary information (all required fields are indicated with an \* )
  - Use your own invoice numbering convention for the **Invoice #** field
  - **Add** your invoice in pdf, as an attachment
  - Verify auto populated invoice information at the header and line level and adjust as necessary
  - Details from the PO are automatically populated to the invoice draft

Create Invoice Create

General Info From

\* Invoice #  ✓

\* Invoice Date

Payment Term

Date of Supply

\* Currency

Delivery Number

Status

Shipping Term

Image Scan  No file chosen

Supplier Note

\* Attachments  |  |

Exchange Rate

\* Supplier

Supplier Tax ID

\* Invoice From Address

\* Remit-To Address

\* Ship From Address

To

Customer

Bill To Address   
  
  
  
VAT ID

Buyer Tax ID

Ship To Address   
  
  
  
  
  
  
VAT ID



*You are able to add multiple invoice attachments and partially invoice, so do as necessary to fit your organization's invoicing needs and capabilities.*



# CREATE AN INVOICE VIA PO EMAIL

- Add Tax in Total&Taxes section which refers to lines
- If applicable, any additional shipping and tax information will be routed for additional approvals
  1. In invoice **summary level**, select applicable tax percentage from drop down
- Click **Calculate** to update the invoice total after all additional charges are added
- Enter any necessary comments for Lear, then click **Add Comment**

Lines  Line Level Taxation

Type	Description	Qty	UOM	Price	
	Morocco_Test_290620	12.000000	Each	50.00	600.00 <span style="color: red;">✖</span>

PO Line: [PK433487-1](#) Contract:  Supplier Part Number:

Billing: HR01-OFFICE FURNITURE-61253000

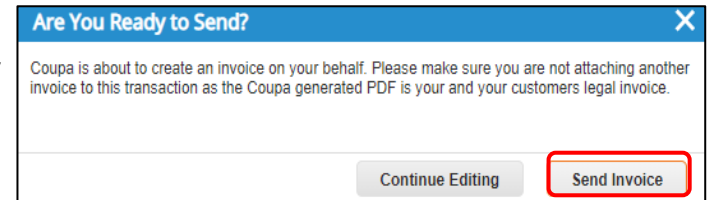
Totals & Taxes

Lines Net Total	1,050.00
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
<span style="color: green;">+</span> Tax Reference	<input type="text"/> Enter a tax reason description.
Tax	<input type="text"/> 5 % <input type="text"/> 52.50
<span style="color: green;">+</span>	
Total Tax	52.50
Net Total	1,050.00
<b>Total</b>	<b>1,102.50</b>



# CREATE AN INVOICE VIA PO E-MAIL

- **Submit** when you have completed all information on the invoice, a popup will appear to confirm if you are ready to send the invoice since invoices cannot be changed via email or CSP once submitted
- If you wish to go back to edit, click **Continue Editing**
- Click **Send Invoice** to send the confirmed complete invoice to Lear

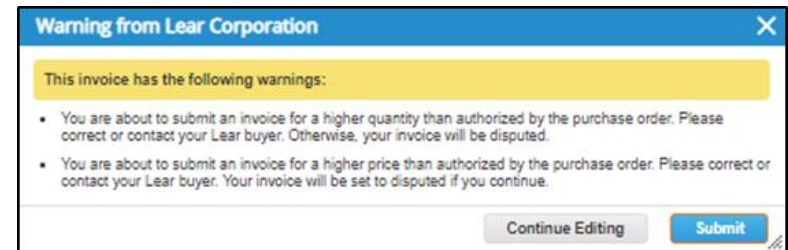


Lear will dispute (automatically) any invoice that is:

- Does not match with the PO's **currency**
- Exceeds the PO **quantity**
- Exceeds the PO **unit price** (For quantity based POs)
- Exceeds the PO **amount** (For amount based POs)
- Has a different **Unit of Measure (UOM)** than the PO line



In case you try to submit an invoice that is not aligned with the above rules, you will receive a submission warning, in that case do not submit your invoice or it will be disputed automatically. Contact your Lear buyer if a PO amendment is required.



# DISPUTED INVOICE (WHAT IT MEANS AND HOW TO SOLVE IT)

## Different Required Action Depending on Invoice Type

→ **Standard e-Invoice:** Simply go to disputed invoice and void or correct invoice, adjusted invoice can be re-submitted

If your invoice is disputed, you will receive an action e-mail and a notification in the CSP  
View Invoice, in order to start the resolving process

Invoice #TestInvoice2 is in dispute [Inbox x](#)

Lear Corporation <do\_not\_reply@lear-test.coupa.com>  
to me ▾

 Invoice #TestInvoice2 is in dispute

Powered by 

Hi,

Invoice TestInvoice2 has been disputed by Lear Corporation.

#### Dispute Reason(s)

- Price different from PO/Contract or Catalog
- Quantity different from PO/Contract or Catalog

Date: 2020-04-28

Additional Comments: ,

This invoice is available on the [Coupa Supplier Portal](#) to view and resolve. Resolving the disputed invoice would mean you are creating a corrected invoice. The corrected invoice can be submitted to Lear Corporation for review.

Resolving the disputed invoice links the corrected, and the disputed invoices. Unless you resolve the disputed invoice, Lear Corporation can choose to withdraw it from this status.

If you are a supplier using Coupa Invoicing in European countries, please note that to cancel an invoice you must first create and submit a credit note. If the prior invoice is canceled, you can create and submit a new invoice with a different number.

This process is recommended to comply with tax laws across all European countries, so that you do not expose yourself or your customer to any unnecessary risk as the invoice is corrected.

[View Online](#)




# ACTING ON DISPUTED E-INVOICE

- The page will refresh to display the invoice page in the CSP
- Click on the **resolve** button next to the disputed invoice

## Invoices

Create Invoices ⓘ

Export to	View	All	Search			
<a href="#">Create Invoice from PO</a>	<a href="#">Create Invoice from Contract</a>	<a href="#">Create Blank Invoice</a>	<a href="#">Create Credit Note</a>			
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
<a href="#">TestInvoice2</a>	04/28/20	Disputed	<a href="#">PK432665</a>	878.60 EUR	Yes	
<a href="#">TestInvoice</a>	04/28/20	Pending Approval	<a href="#">PK432665</a>	69.00 EUR	No	

**Void invoice** if it was issued in duplicate or has been paid already.

**Correct invoice** if it was disputed because of incorrect detail. This option will allow you to provide corrections and submit the invoice once again.

The recommended action is to send request to Lear AP team to abandon the invoice which releases the receipts from the original invoice instead of issuing credit note. Once complete you can submit a new invoice

## Totals & Taxes

Lines Net Total		136.00
Lines Tax Totals	10%	4.60
	20%	18.00
<hr/>		
Shipping		600.00
Tax	20%	120.00
<hr/>		
Total Tax		142.60
Net Total		736.00
<b>Total</b>		<b>878.60</b>

Void

Correct Invoice

Invoice #TestInvoice2 has been abandoned. [Inbox x](#)

Lear Corporation <do\_not\_reply@lear-test.coupacloud.com>  
to me

 Invoice #TestInvoice2 has been abandoned.

Powered by 

Hi,

Invoice TestInvoice2 has been abandoned from processing by Lear Corporation. Please see below for further information.

Abandon Reason: Invoice needs to be abandoned without a Credit from supplier.

Additional Comments from Lear Corporation:

Date: 2020-04-28

[View Online](#)

When invoice will be abandon by AP you will get e-mail notification. You can view invoice online and download from CSP



**THANK YOU FOR YOUR ATTENTION!**

**PLEASE CONTACT US ON**

**[EUCOUPASUPPLIERSUPPORT@LEAR.COM](mailto:EUCOUPASUPPLIERSUPPORT@LEAR.COM)**

**IN CASE OF ANY QUESTIONS OR IN NEED FOR  
SUPPORT**

