



# Lear E-Invoicing

Supplier Training

**February 2024**

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COUPA E-INVOICING PROJECT

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**Making every drive better™**



# TABLE OF CONTENTS



	Solution Overview - Coupa Introduction
	How You will Benefit from This
	Registration and System Demonstration
	Q&A Section





# Overview of the Coupa Solution



Coupa is a **market leading cloud based Procure-to-Pay software** used by many **organizations** for **electronic Purchase Order & Invoice transactions**



**Increased efficiency and collaboration** between 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 visibility to invoice status/payment transparency**



**\*CSP – Coupa Supplier Portal**

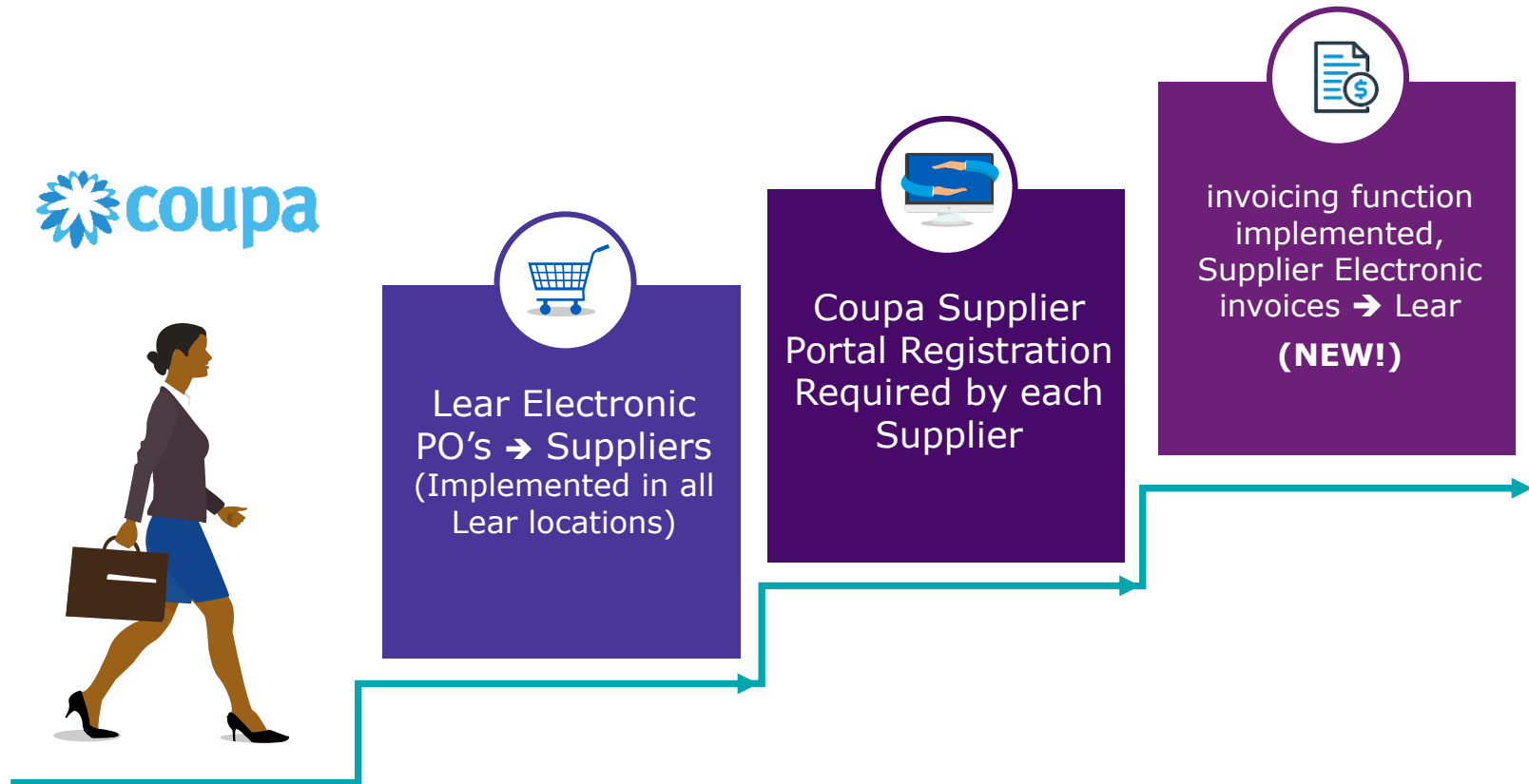


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# Progress towards Coupa E-Invoicing

Join us in becoming more digital & efficient!





# How You Will **Benefit** From This

Once invoicing is implemented

- ✓ Submit your invoice **electronically** to Lear via CSP at your convenience
- ✓ Increased **accuracy** and **efficiency** by using PO data to create invoices
- ✓ Instant **visibility** to Invoice Status and related Payment information



- ✓ **Self-Managed**, complete control of assigning your CSP user access
- ✓ Instant **visibility** to Purchase Orders & Sourcing Events
- ✓ Create/Edit a **catalog**, defined items offered to your customer





# Expanding the Coupa Cloud Platform!

Progressive next step towards Coupa e-Invoicing: **Request2Receipt -> Request2Pay (P2P)**



## → Current Wave 7 (Philippines) GO-LIVE – [March 13<sup>th</sup>, 2024](#)

- Streamline invoice processing, defined approval flows and automated exception handling;
- Providing supplier portal, empower/delegate supply base to register invoices in Lear system;
- Eliminate/reduce manual efforts & paper pushing;
- Enhanced transparency, traceability & document retention;
- Alignment of Global Business Services (GBS) strategy.

Company Name	TIN	Plant	Division	Lear Internal HFM Code
Lear Automotive Services (Netherlands) B.V.-Phil. BR.	221-676-124-00000	Cebu Central Office	E-SYS	417
		Cebu FSSC	Corp	409
		Gabriela	E-SYS	271
Lear Philippines Engineering Branch	010-244-857-000	PETC	E-SYS	413EN
		PETC	E-SYS	416EEN
		PETC	Eng	416EN



# Scope of this Wave of Deployment

- In this wave, we will deploy the new Coupa Invoicing solution to
  - 6 entities in Philippines

Plant	Division	BU	Hyperion
Cebu Central Office	E-SYS	Admin	417
Cebu FSSC	Corp	Corp	409
Gabriela	E-SYS	Wire	271
PETC	E-SYS	Elec	413EN
PETC	E-SYS	Wire	416EEN
PETC	Eng	Seat	416EN

- Tentative go-live date is in early March 13<sup>th</sup>, 2024 and go-live announcement will be separately sent to you. Before you officially receive the go-live announcement, please follow the existing process to send invoices into the plant.
- After go-live, rule-of-thumb on how to invoice: if you have received a Lear Coupa PO, then invoices for such a PO should be submitted via Coupa (today's training). If you have received a Lear PO which is not issued from Coupa, then invoicing process does not change as compared to today. Comply with other requirements from the Lear plant team(s) to you too.





# Today's session in relation to the CSP User Guide

## Today's subject – Corresponding pages in the User Guide

- Register to Coupa Supplier Portal(CSP) and logging in - Page 2 ~ 16
- CSP Home Page – Page 16 ~ 28
- CSP Admin & Setup – Page 29 ~ 46
- View & Manage POs – Page 57 ~ 60
- Invoice Creation – Page 60 ~ 69
- View & Manage Invoices – Page 69 ~ 72
- Create Custom Views – Page 46 ~ 47
- View Payment Information – Page 72 ~ 74
- Resolving Invoice Disputes – Page 74 ~ 75





# Connection to Lear via Coupa

- ❑ Using our stored contact information, we shall **send you an invitation to connect and register to the Coupa Supplier Portal**
- ❑ Use **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** Email address for joining Coupa supplier portal.  
-Please check your junk/spam folders

- View PO details
- Acknowledge POs
- **Create and Submit Invoices**
- View/Monitor Invoice, Catalog & 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  
- Notify any updates to your **Lear Buyer** contact.

Register & complete account set up

- Update Company Profile
- Add **Legal Entity & Remit To** information(Enable E-Invoicing)
- Add & Manage Users
- Merge Accounts

Contact [CoupaSupplierAsia@Lear.com](mailto:CoupaSupplierAsia@Lear.com)  
(English Only) if you encounter technical difficulties.






# Register to Coupa Supplier Portal (CSP)


- Invitation from Lear
- Purchase Order(PO) email

Action Required - Lear Corporation TEST Registration Instructions




Coupa Supplier Portal <do\_not\_reply@supplier-test.coupahost.com>  
to coupasupplieruser+110000001 ▾

2:54 PM (0 minutes ago) ☆



Action Required - Lear Corporation TEST Registration Instructions

Powered by 

Hello PH\_TESTSUPPLIER 2\_TST4321Piaridel St., Alang-alang CA\_TEST1234,


We handle all business spend electronically to make sure you're paid on time and prevent lost documents.


To ensure your ability to do business with us, you have 48 hours to register your account. Please contact us at [supplier@coupa.com](mailto:supplier@coupa.com) if you are unable to register for any reason!

Lear Corporation TEST

Join Coupa Supplier Portal

Forward Invitation

Powered by 

  
Lear Automotive India Pvt. Ltd Purchase Order #A1062224

Order Summary

Date 05/10/23

PO Total 55,600.00 INR

Shipping Terms DDP


Payment Terms 355\_45 Days from Invoice\_CK045


Contact Do Xun Law  
[DLaw@Lear.com](mailto:DLaw@Lear.com)


Manage Order

Create Invoice


Orders details below


 Acknowledge PO


 Add Shipment Tracking

 Add Comment

Manage your orders and more with Coupa

 Insight

 Opportunity

 Collaboration

Create Your Account

Learn more about Coupa

\*Note:

CSP invitation is sent from  
[do\\_not\\_reply@supplier.coupahost.com](mailto:do_not_reply@supplier.coupahost.com)  
Coupa PO is sent from  
[do\\_not\\_reply@lear.coupahost.com](mailto:do_not_reply@lear.coupahost.com)

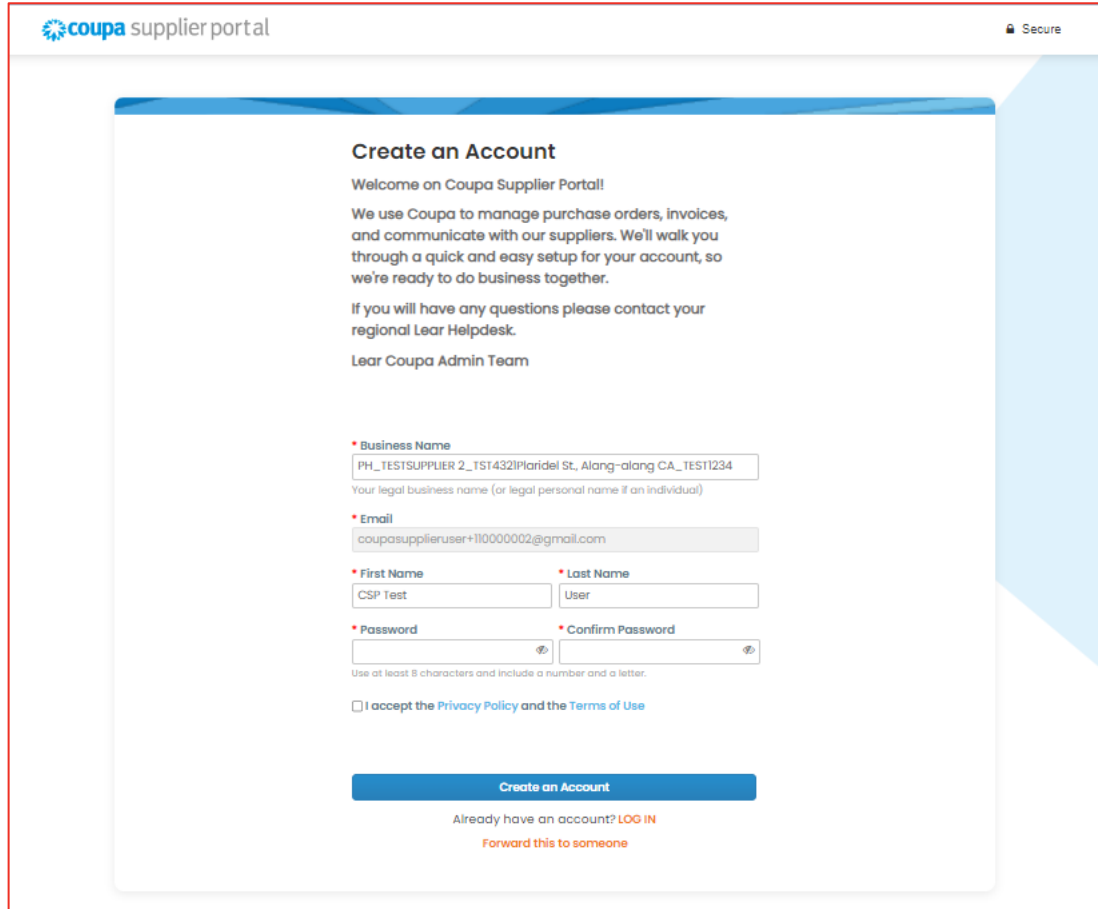


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# Account Creation

- Fill out the required details such as your name and the desired password.
- Accept the privacy policy and the terms of use
- Click on “Create an Account”



The screenshot shows the 'Create an Account' page of the Coupa Supplier Portal. The page has a blue header with the 'coupa supplier portal' logo and a 'Secure' indicator. The main content area is white with a blue header bar. The title 'Create an Account' is followed by a welcome message and instructions. Below this, there are several input fields for account details: Business Name, Email, First Name, Last Name, Password, and Confirm Password. A checkbox for accepting the Privacy Policy and Terms of Use is located below the password fields. At the bottom, there is a blue 'Create an Account' button, a link for existing users to 'LOG IN', and a link to 'Forward this to someone'.

**coupa** supplier portal Secure

### 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**  
PH\_TESTSUPPLIER 2\_TST432IPlaridel St., Along-along CA\_TEST1234  
Your legal business name (or legal personal name if an individual)

**\* Email**  
coupasupplieruser+11000002@gmail.com

**\* First Name** CSP Test **\* Last Name** User

**\* 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](#)





# Account Verification

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left and a 'Secure' indicator is on the right. A blue notification bar at the top states 'OTP sent successfully via email' with a close button. Below this is a 'Back' link. The main heading is 'Email Verification'. The text below reads: 'We sent a one-time verification code to coupasupplieruser+110000002@gmail.com'. There is a row of six empty input boxes for the verification code. Below the boxes, it says 'Didn't receive the Verification Code?' followed by a link 'Request a New Code'. At the bottom is a large blue 'Next' button.

- You will be required to verify your account. A one time 6-digit verification code will be sent to your email address.
- If you did not receive the code, click on “request a new code”.





# Set Up Two-Factor Authentication

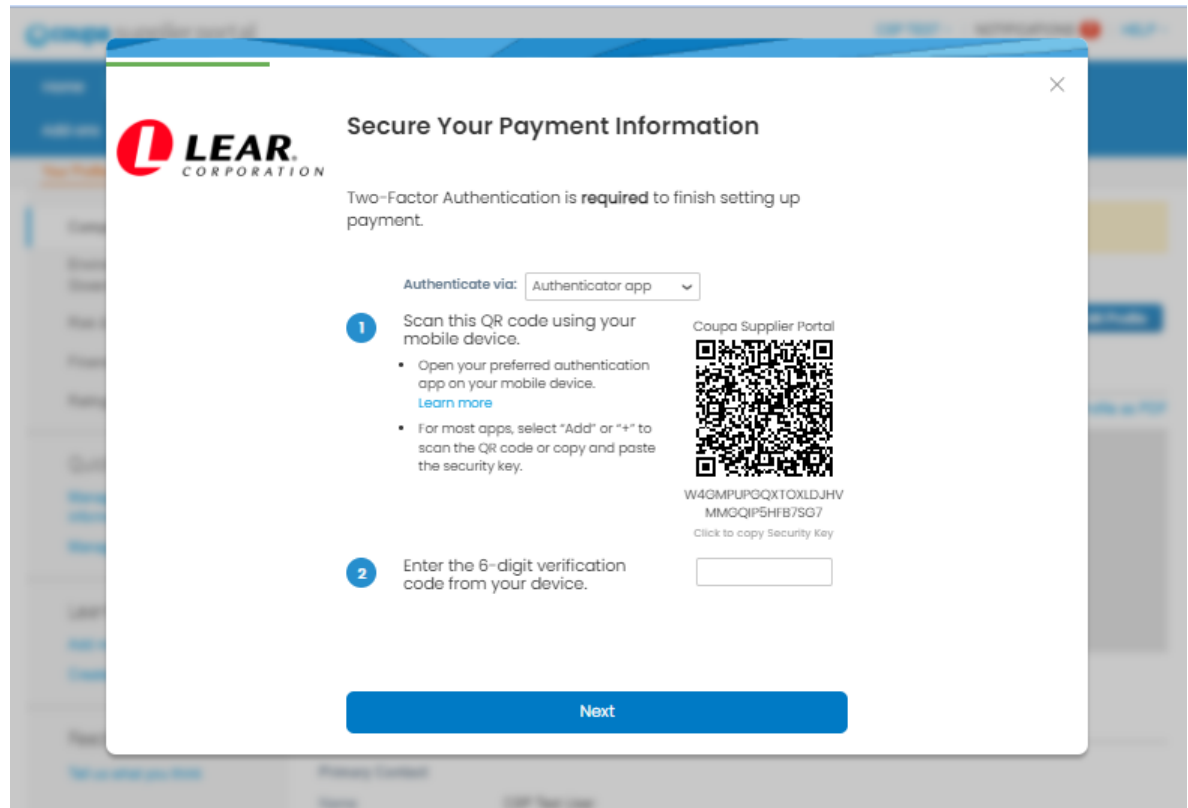
1. Select the preferred way to authenticate. Either thru an authenticator app or via SMS.
2. Scan the QR code using authenticator app. Or provide a valid mobile phone number if you opt to authenticate via SMS.
3. Enter the 6-digit verification code from your device.
4. Click next

\*\*\*Recommended authenticator apps:

Duo Mobile



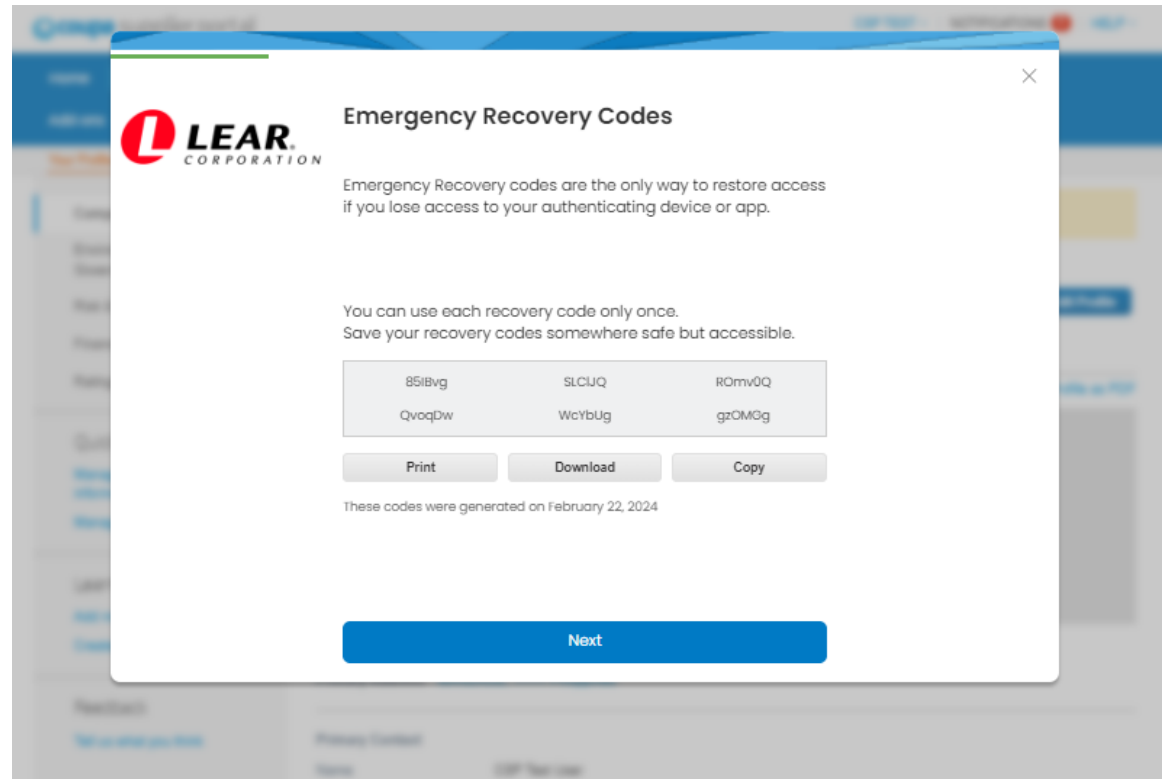
Authy (Twilio Authy)

A screenshot of a web browser showing the LEAR Corporation Two-Factor Authentication setup screen. The screen has a blue header with the LEAR logo and the title 'Secure Your Payment Information'. Below the title, it says 'Two-Factor Authentication is required to finish setting up payment.' There is a dropdown menu labeled 'Authenticate via:' with 'Authenticator app' selected. Below this, there are two numbered steps: 1. 'Scan this QR code using your mobile device.' with sub-points 'Open your preferred authentication app on your mobile device.' and 'For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.' and a 'Learn more' link. 2. 'Enter the 6-digit verification code from your device.' with a text input field. To the right of the steps is a QR code labeled 'Coupa Supplier Portal' and a security key 'W4GMPUPQXTOXLDJHV MMGQIP5HFB/SG7' with a 'Click to copy Security Key' link. At the bottom is a blue 'Next' button.



# Emergency Recovery Codes

- Print, download or save your backup codes.
- Important Reminder: **DO NOT DELETE YOUR AUTHENTICATOR APP**. If you accidentally deleted it or lost access to your mobile device, you may use your emergency recovery codes to login or if asked to provide a code. Do not forget to re-setup your two-factor authentication once logged in. After that, regenerate a new set of recovery codes.
- You will receive an email notification every time you setup the two-factor or multi-factor authentication.





# Coupa Supplier Portal(CSP) Homepage

- Language
- Menu
- Announcements
- Notifications
- Help

The screenshot displays the Coupa Supplier Portal (CSP) homepage. The interface includes a top navigation bar with the Coupa logo and 'supplier portal' text. On the right of the top bar, there are links for 'SUPPLIERNAME', 'NOTIFICATIONS 10', and 'HELP'. Below this is a main navigation menu with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. A red box labeled '2' highlights this menu. Below the navigation bar, there is a status bar with a blue 'In Progress' indicator and the text 'Your Company Verification Has Started! Check back soon for updates—the process can take up to 5 business days to be completed.' Below this is a 'New' announcement: 'Exclusive discounts for your business to thank you for being a part of the Coupa Community.' Below the announcement is a 'Recommended' section: 'Complete your profile to get paid faster and get discovered. Learn More'. Below the recommended section is a 'Profile Progress' section with a 'Last Updated' timestamp of '10 minutes ago' and a button 'Improve Your Profile'. Below the profile progress is a 'Profile Summary' section with three cards: '18 Legal Entities View', '1 Registered User View', and '3 Connected Customers'. Below the profile summary is a 'Supplier Name' section with a globe icon and a list of links: Website (http://www.easy-systems.be), Industry, About, Established (2007), Top Commodities, Currencies, and Public Profile (Profile). Below the supplier name is a 'Language' section with a button 'English (US)' labeled '1'. Below the language section is a footer with the Coupa logo, 'Business Spend Management', and copyright information: '© 2006-2022 Coupa Software Incorporated Privacy Policy Terms of Use'. On the right side of the page, there are several sections: 'Announcements View All (0)' labeled '3', 'One-Click Savings View All', 'Merge Accounts' with a 'Request Merge' button, and 'Latest Customers' with a list of customers: 'Lear Corporation TEST - Customer 1', 'Lear Corporation TEST - Customer 2', and 'Lear Corporation TEST - Customer 3'. A red box labeled '4' highlights the 'Announcements' section, and a red box labeled '5' highlights the 'HELP' link in the top navigation bar.





# CSP Administration & Basic Settings

*The following parts can be done before E-invoicing goes live!*

- Update Your Company **Profile**
- Invite Other **Users**
- Merge **Accounts**
- Add **Legal Entity**
- Add **Remit-to**

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress 18 minutes ago [Improve Your Profile](#)

Profile Summary

17 Legal Entities [View](#)

2 Registered Users [View](#)

3 Connected Customers [View](#)

Banking Info Diversity Accelerate Bribery Policy

Invite User

First Name

Last Name

\*Email

Permissions [?](#) Customers

☒ All ☒ Admin ☒ Orders ☐ Restricted Access to Orders

☒ Invoices ☒ Catalogs ☒ Profiles ☒ ASNs ☒ Service/Time Sheets ☐ Restricted Access to Service/Time Sheets

☒ Payments ☒ Order Changes ☒ Pay Me Now ☒ Business Performance ☒ Sourcing ☒ Order Line Confirmation

☒ All ☒ Lear Corporation TEST

[Cancel](#) [Send Invitation](#)

## Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here](#).

### SupplierA

supplierA@supplier.com

[Request Merge](#)

[Remove](#)

### SupplierB

supplierB@supplier.com

[Request Merge](#)

[Remove](#)

## Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\*Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

[Cancel](#)

[Continue](#)

## Add a new Remit-To account

\*Payment Type

What is your Remit-To Address?

\*Address Line 1

Address Line 2

\*City

State

\*Postal Code

\*Country/Region

[Recommended](#)

If you receive payments to a different location to where your business is registered, add the address here.





# Purchase Order

- Select Customer
- View a PO
- Acknowledge a PO
- Print a PO
- Enter Comments to a PO

## Remarks:

- Unit prices on the Lear POs should be VAT excluded. VAT is only specified during invoice stage.
- As a supplier to Lear, before supplying goods or providing services, please ensure that you have received a Purchase Order from the Lear requesting party. Otherwise, your on-time payment will be affected.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'SUPPLIERNAME' with a dropdown arrow, 'NOTIFICATIONS 8', and 'HELP' are on the right. Below this is a blue navigation bar with links: Home, Profile, **Orders** (highlighted with a red box and a red circle with the number 1), Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar is a secondary bar with links: Orders (highlighted with a red box), Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. The main content area is titled 'Purchase Orders'. At the top right of this area is a 'Select Customer' dropdown menu (highlighted with a red box and a red circle with the number 2) showing 'Lear Corporation TEST - 355\_India Testing\_1...'. Below this is a link: 'Click the [icon] Action to Invoice from a Purchase Order' (with a red circle with the number 3). Below the link is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row of the table is highlighted with a red box and a red circle with the number 3. The PO Number is 'A1062224', Order Date is '2023-05-10', Status is 'Issued', Acknowledged At is 'None', and the Items column lists: '2 Each of Laptop Battery HP Original For 640G1', '5 Each of Logitech H151 Headphone', '10 Each of Toner Cartridge 28A Compatible High yield', '2 Each of Jabra speak 510', '1 Each of M.2 SSD to USB converter', '2 Each of HDMI to DP Converter', and '2 Each of VGA to DP Converter'. The Unanswered Comments column shows 'No', and the Total column shows '59,600.00 INR'. The Actions column has icons for print, email, and other actions.





# Create an invoice via CSP

- Create Invoice from PO
- Create Blank Invoice
- Create Credit Note

## Remarks:

- If you are a supplier for multiple Lear entities, before creating an invoice via CSP, please select the correct customer from the list.
- Ensure system submitted data is the same as on the invoice document.
- Must attach a soft copy of the invoice document in the system – please follow the local requirement whether or not the hard copy needs to be posted to the plant.

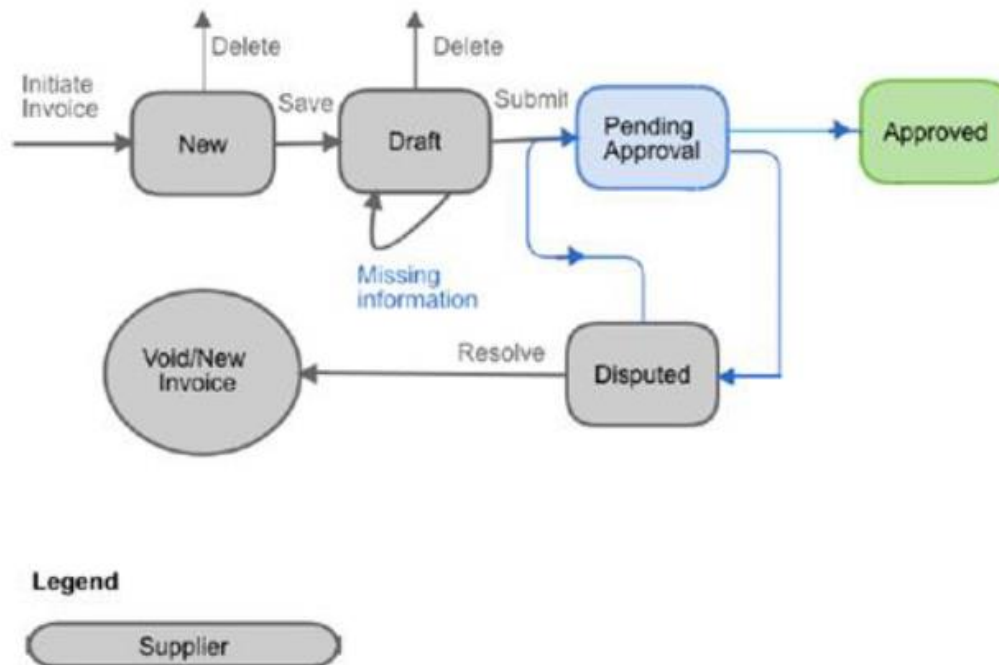
The screenshot shows the CSP Invoices page. A red box labeled '1' highlights the 'Invoices' tab in the top navigation bar. A red box labeled '2' highlights the 'Select Customer' dropdown menu, which is set to 'Lear Corporation TEST - 355\_India Testing\_1...'. A red box labeled '3' highlights the 'Create Invoice from PO' button in the 'Create Invoices' section. Below this, there is a table with columns: Invoice #, Created Date, Status, PO #, Gross Total, Unanswered Comments, Dispute Reason, and Actions. The table currently shows 'No rows.' and a pagination bar at the bottom indicates 'Per page 15 | 45 | 90'.





# Invoice Status


- Once successfully submitted, suppliers can not edit / withdraw the invoice by themselves.





# Create an invoice via Email

## Create a PO invoice by Supplier Actionable Notification (SAN) Email

Powered by 

**LEAR CORPORATION**


Lear Automotive India Pvt. Ltd Purchase Order #A1062224


### Order Summary


Date: 05/10/23  
PO Total: 59,600.00 INR  
Shipping Terms: DDP  
Payment Terms: 355\_45 Days from Invoice\_CK045  
Contact: De Xun Law  
[DLaw@lear.com](mailto:DLaw@lear.com)

**Manage Order** **Create Invoice**


Orders details below


 Acknowledge PO


 Add Shipment Tracking

 Add Comment

### Manage your orders and more with Coupa

 Insight

 Opportunity

 Collaboration

**Log In Now**

[Learn more about Coupa](#)

**Choose Invoice From Address**

No Invoice From Addresses to choose from.

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

**Cancel** **Create New Remit-To**

**coupa supplier portal**

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Schedule Lines Deliveries

### Create Invoice

Create

Based Customer: Lear Corporation TEST - 305, India Testing, ...

**General Info**

Invoice #   
Invoice Date: 2023-05-10   
Payment Terms: 355\_45 Days from Invoice\_CK045  
Date of Supply: 2023-05-10   
Currency: INR   
Delivery Number:   
Status: Draft  
Supplier Note:   
Attachments:  Add File | URL | Text  
Invoice Reference Number (IRN):   
Signed QR Code:   
Place Of Supply:

**From**

Supplier: 305, India Testing, 10126333  
Supplier QRIN: 27AMQK0201M123  
Invoice From Address: India Testing, Gat No-347, Anya Industrial Park behind Vitthal VM Aniwale Pune NA Maharashtra India  
Remit-To Address: India Testing, Gat No-347, Anya Industrial Park behind Vitthal VM Aniwale Pune NA Maharashtra India  
Ship From Address: India Testing, Gat No-347, Anya Industrial Park behind Vitthal VM Aniwale Pune NA Maharashtra India

**To**

Customer: Lear Corporation TEST  
Bill To Address: B-86, Ambad MDC, Ambad, Nashik-422010, Maharashtra, India  
Buyer QRIN: 27AMQK197K123  
Ship To Address: B-86, Ambad MDC, Ambad, Nashik-422010, Maharashtra, India, Location Code: 5006  
Scheduled Payment: None  
Date:   
Supplier Default: INR  
Currency:   
Whether Tax is Payable on Reverse Charge:

**Enter a new address**

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

### Company Information

Supplier: Berdinary Stationery  
Country/Region: United States  
Registered company legal name:

### Address

Remit To Name:   
Line 1:   
Line 2:   
City:   
State: Select an Option  
Postal Code:   
Preferred Language: English

### Tax Registration

Tax Country/Region: United States  
Tax ID:   
Not For Cross-Border Invoices: ☐

### Banking Information

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

Bank Name:   
**Cancel** **Create and Use**





# Taxes on invoices

Tax type can be added on invoice line and can be added on invoice header level in Coupa

VAT entered on invoice Line level

- Please **check** Line Level Taxation;
- Enter the tax rate according to your legal tax invoice;
- Tax amount will be calculated automatically;
- In case there is a rounding difference you can modify the final tax amount based on your tax invoice;
- Then please go to the bottom of the page, click **Calculate** to verify whether the total amount matches with your invoiced amount.

Lines

☒ Line Level Taxation

Type	Description	Qty	UOM	Price
	test890	2.000000	Each	1,230.00

2,460.00

PO Line: P1063599-1 Clear

Service/Time Sheet Line: None

Contract:

Supplier Part Number:

Environmental Mapping:

Billing: 3157-COMPUTER SERVICES-53015726

This is only to be used for mapping environmental data with other systems

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
	10	246.00	

Lines Net Total: 2,460.00

Shipping:

Tax:

Tax Reference: Enter a tax reason description.

Tax: 10.000 % 246.00

Total Tax: 246.00

Net Total: 2,460.00

Total: 2,706.00

Delete Cancel Save as Draft Calculate Submit





# Manage Multiple Payment Schedules on PO

- Subject to your agreement with Lear, if your purchase order requires multiple payments at difference stages, please try to issue tax invoices for each payment.
- For example:
  - The agreed payment schedules to purchase an equipment X is 10%+80%+10% (10% down payment on order issuing, 80% after physical delivery, 10% warranty to be paid out one year after commissioning);
  - This payment agreement information will display on the PO in "Payment Agreements" section;
  - This supplier shall issue 3 invoices and submit in Coupa 3 times by the time point remarked in the agreement – please adjust the invoice value in Coupa on each submission;
  - If you have any questions on this requirement, please send them to your Lear Buyer/Purchasing Contact.

## Payment Agreements

Type	Due Date	Payment Term	Amount	Notes
prepayment		Cash	1,000,000 INR	
retainage		60 days after inv date	8,000,000 INR	Payment after Delivery 60 days net
retainage		60 days after inv date	1,000,000 INR	10% warranty of total amount one year later 60 days net





# View Payment Information

View detailed payment information for each specific invoice.

- “Payment Information” **View** :  
Invoices





Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to 							View 	Payment Information 	Search 
Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information		
No	<a href="#">A1062224</a>	<a href="#">355 RCM 12333</a>	Pending Approval	2023-05-10	355_45 Days from Invoice_CK1045	2023-05-10			
Yes	<a href="#">A1062224</a>	<a href="#">355 RCM 12345</a>	Approved	2023-05-10	355_45 Days from Invoice_CK1045	2023-05-10	Payment# Laptop Battery HP Original For 640G1 on 2023-05-11 for INR 8,500.00		

Per page [15](#) | [45](#) | [90](#)

- “Payments” Section at the Invoice Page bottom :

 Payments

Status Fully Paid

Paid-in-Full Date 2023-05-10

Payments 

Payment Reconciliation Details

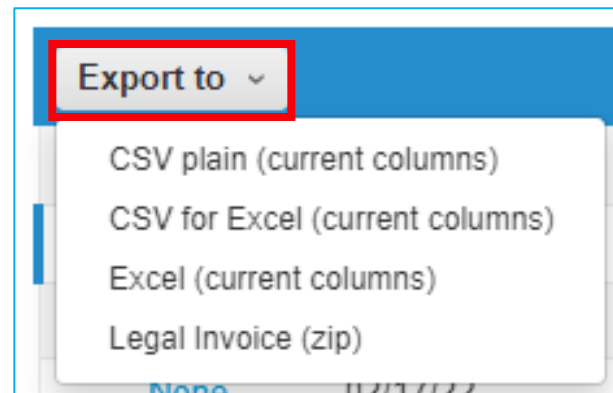
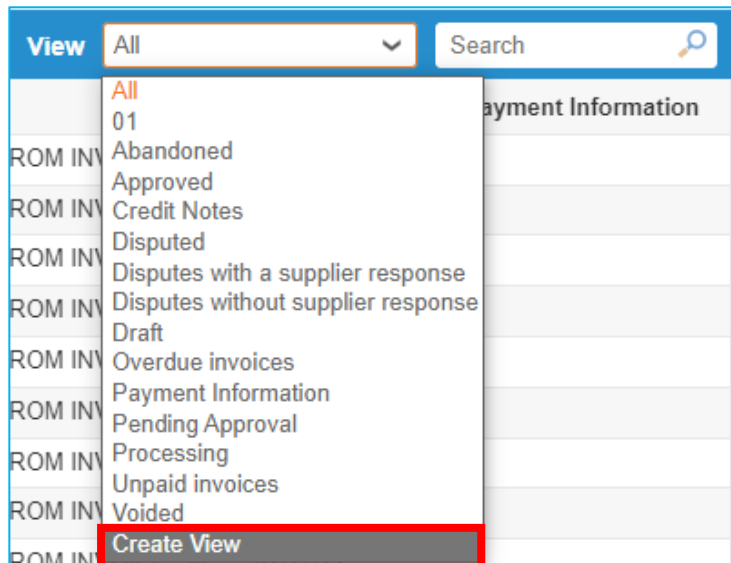
Status	Date	Type	Description	Amount
Posted	2023-05-11	Payment	Laptop Battery HP Original For 640G1	8,500.00





# Create Custom Views & Generate A Report in CSP

- **“Create View”** : Select any of the available columns to create custom views
- **“Export To”** (drop-down menu) : generate a report in CSV or Excel format



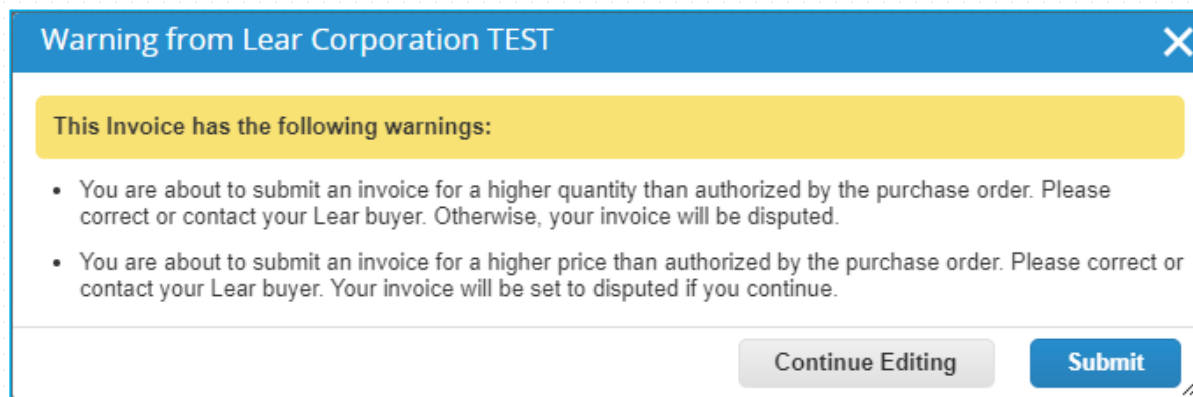


# Resolve Disputed E-Invoice

- Reasons of Dispute Status

- |   |   |
|---|---|
| -Backdated more than 60 days                  | -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 tried 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.



- Methods to Resolve Dispute : “Void/Correct Invoice” or Cancel Invoice/Adjust”

❖ The method of resolving dispute depends on the type of your invoice *Standard e-invoice* or *Country compliant e-invoice*, and this is mainly driven by which country you're from.





# Resolve Disputed E-Invoice

- **Standard e-invoice:** “Void” or “Correct Invoice”


- Void:

- If an invoice was issued in duplicate or has been already paid for through an earlier invoice, void it.

- Correct Invoice:

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

- **Country compliant e-invoice :** “Cancel Invoice” or “Adjust”

Country compliant e-invoices are marked with a green checkmark next to the country code  **US** in their top right corner.

- Cancel Invoice:

- If an invoice was issued in duplicate, create a credit note to cancel it.

- If an invoice has some incorrect information (other than price or quantity), for example, incorrect tax rate or item description, create a credit note to cancel it and issue a new corrected invoice. The original invoice remains in disputed status and the corrected invoice is submitted for approval.

- Adjust:

- If the price and/or the quantity for invoice lines(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it.

- You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.





# Example:

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer

Lear Corporation TEST - 355\_ India Testing

## Invoices

Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to		View					Search	
Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute Reason	Actions	
<a href="#">123456781234</a>	2023-05-14	Disputed	<a href="#">A1062224</a>	32,640.00 INR	No	Quantity different from PO/Contract or Catalog		





# Invoice #SampleInvoice1 [Back](#)

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.

## Totals & Taxes

Lines Net Total		1,600.00
Lines Tax Totals	2.0%	32.00
<hr/>		
Shipping		0.00
<hr/>		
Total Tax		32.00
Net Total		1,600.00
<b>Total</b>		<b>1,632.00</b>

- for this order, quantity for invoice lines(s) is incorrect on Correct Invoice to update/change the incorrect entry.

Void

**Correct Invoice**



# Summary

- Coupa Invoicing, this New Solution is being gradually implemented in all Lear locations;
- Coupa Supplier Portal(CSP) is a central digital platform, containing all key data - Purchase Orders, Invoices and Catalogs etc.;
- Require Suppliers to accept the invitation and register CSP account to transact with Lear;
- Increase efficiency, reduce mistakes and manual handling process to avoid unnecessary delays in payments;
- Monitor invoice status and all the related payment information via CSP instantly;
- Adopt Coupa latest technologies and innovations with Data-Driven communications, helping us to resolve issues more rapidly!







PLEASE CONTACT LEAR'S CENTRAL SYSTEM SUPPORT TEAM AT [CoupaSupplierAsia@lear.com](mailto:CoupaSupplierAsia@lear.com) IN CASE OF ANY TECHNICAL QUESTIONS OR IN NEED FOR TECHNICAL SUPPORT.

YOUR PURCHASING CONTACT SHOULD ALSO BE ABLE TO HELP YOU UPDATE THE CONTACT INFORMATION AND ISSUE AN INVITATION TO CSP.

ANY QUESTIONS?







THANK YOU FOR YOUR ATTENTION !

