Coupa Supplier Network Invoicing Guide

This Perenti Group CSP Invoicing Guide provides advanced instructions for Suppliers when submitting invoices via the Coupa Supplier Portal (CSP).

These instructions apply if you have already set up a CSP linked to the Perenti Group of Companies. If you have not set up a portal, or if it is not linked to the Perenti Group, please contact us at the Perenti Coupa contact email listed below.

Note: Invoices may also be created via the "Create Invoice" button that comes with the Purchase order email – the same instructions from page 3 onwards apply, but there is not portal login required for PO-email-based invoicing.

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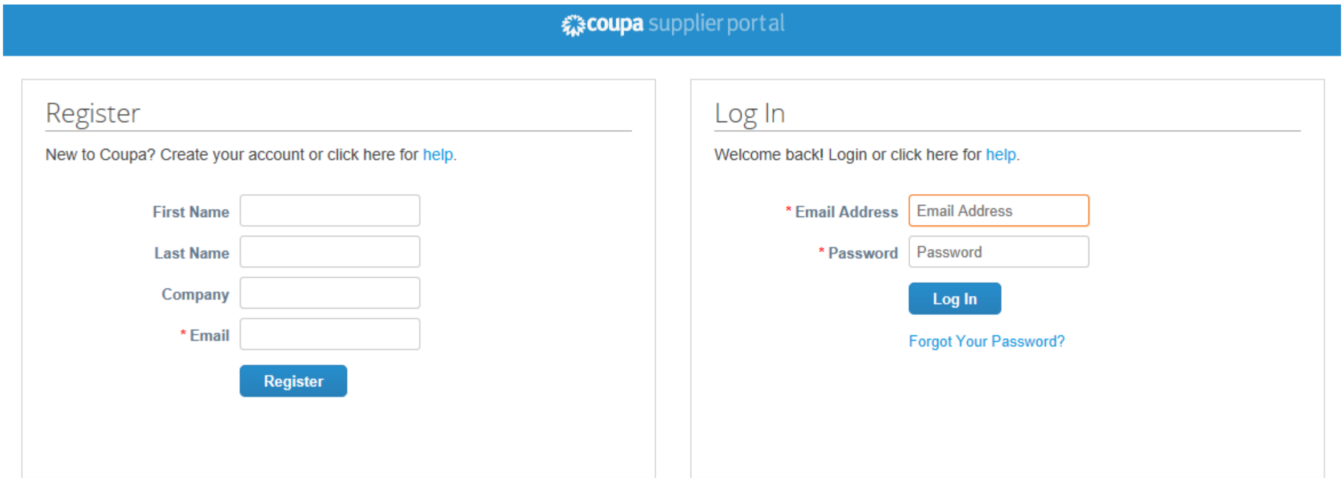
1. Success Portal online help: https://success.coupa.com/Suppliers/For_Suppliers
2. Perenti contact email: helpdesk.ap@ausdrill.com.au
3. If you're interested in cXML and/or punchout integration, please contact us at the above Perenti Group of Company's email address.

Thank you for taking the time to learn more about invoicing via the Coupa Supplier Network (CSN). The CSN is a no-cost network for Suppliers to easily do business with the Perenti Group of Companies (Perenti Limited / DRA / MINL / ANW / BTP / EDA / WCS) and other Coupa customers.

Step 1: Log in to your CSP

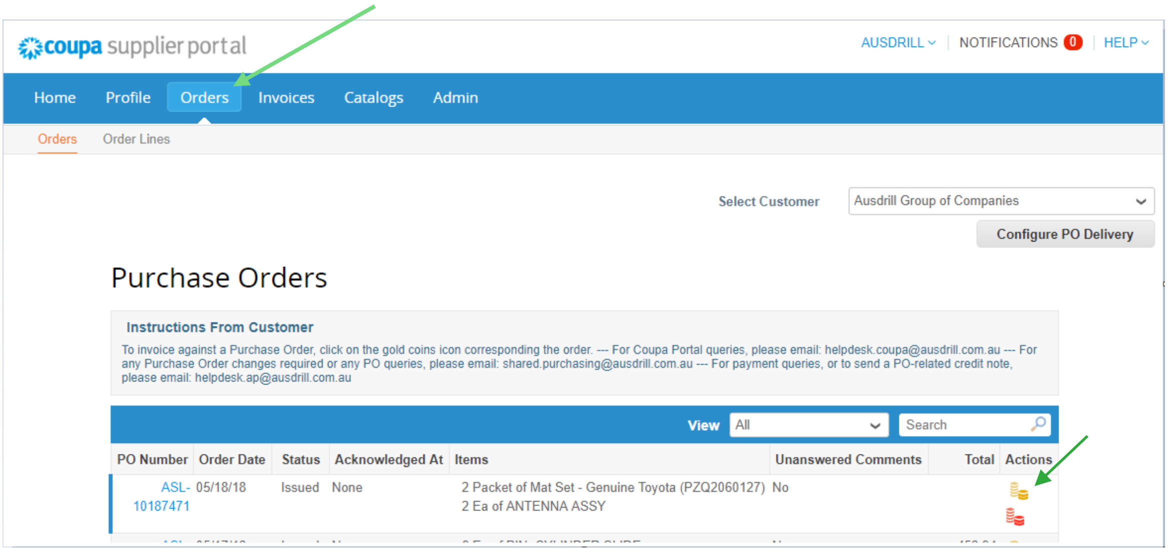
These instructions apply if you have already set up a CSP linked to the Perenti Group of Companies. If you have not set up a portal, or if it is not linked to the Perenti Group, please contact us at the Perenti Coupa contact email listed above.

- To log into the portal, go to **https://supplier.coupahost.com**
- Enter your email and password on the right-hand side and click 'Login'



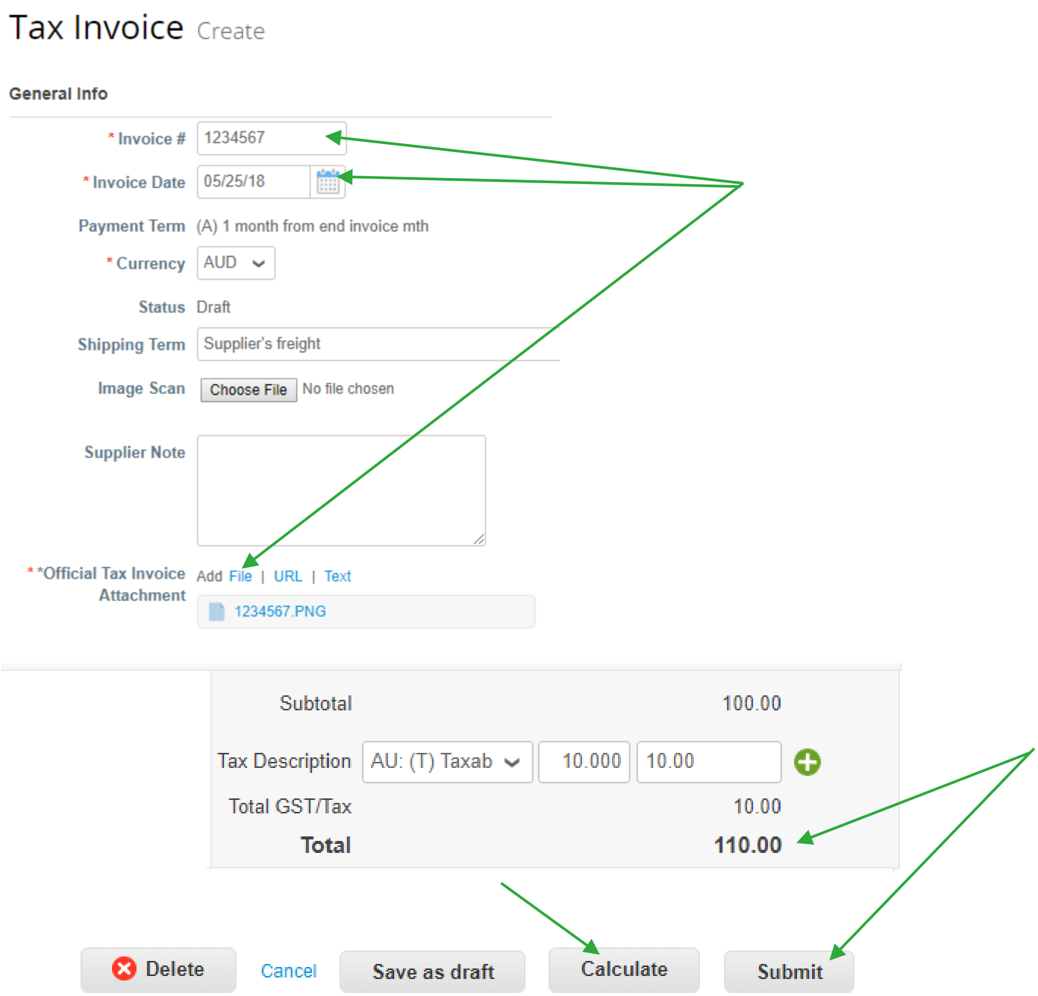
Step 2: Invoicing against a Purchase Order

Basic Instructions for Sending Invoices



1. Click on the "Orders" tab
2. Click the pile of coins icon for the Purchase Order that you wish to Invoice

Note: first search for the order number in the search field if required



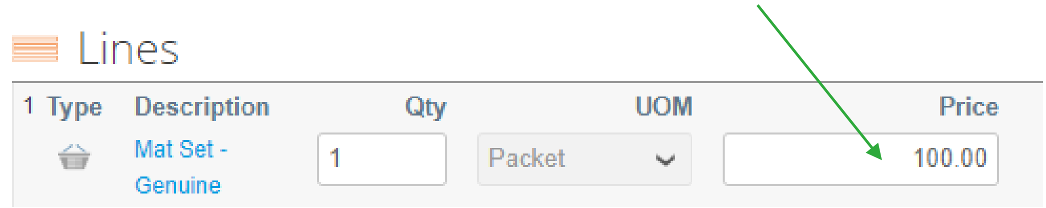
3. Enter the **Invoice #**
4. Add your invoice **attachment**. *Note: this is required*
5. Select the invoice **date** (if invoice date is other than today's date)
6. Select **Calculate** if you made any changes, check the total, and then **Submit**

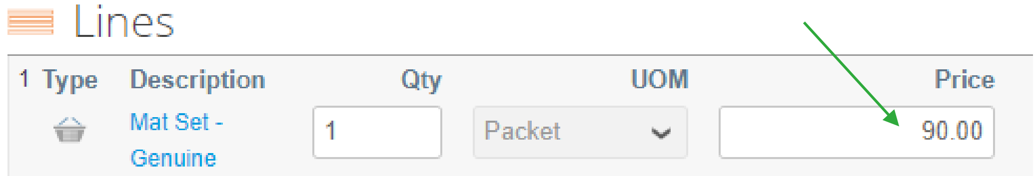
The invoice will be sent to Perenti for payment.

Note: If your attached invoice matches the Coupa invoice details in every way, then no further actions are required. However, if there are differences then one or more of the procedures on the following pages may need to be followed prior to submission of your invoice.

<u>IMPORTANT</u>*: Your draft invoice will require further changes is if your attached invoice Total differs to the Total displayed at the bottom of the invoice in Coupa.*

Changing Item Pricing





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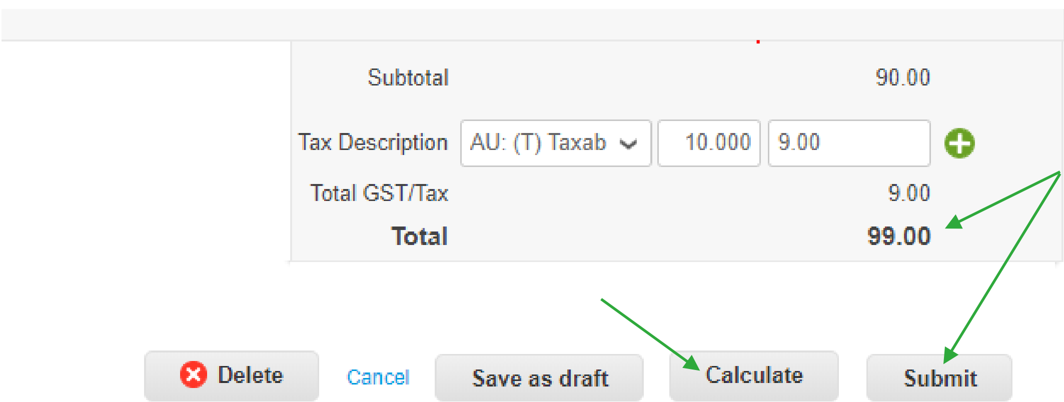


1. If the price for a line item does not agree with your attached invoice, then this value needs to be changed to reflect your actual invoice
2. Click inside the **Price** field and adjust the price accordingly
3. Click **Calculate** for the Invoice Total to be updated
4. Check that the **Total** displayed matches your official invoice's total value
5. Click **Submit** if you have no further changes to make.

Changing Item Quantity

The same principles apply when it comes to invoice item quantities as they do for invoice item prices. Follow the same steps outlined above, but with regards to the **Qty** field. Please note: this is only applicable for invoicing a qty **less than** what was ordered. <u>If qty is greater than</u>, please contact **shared.purchasing@perentigroup.com**, as an order revision may be required priot to your invoice being submitted.

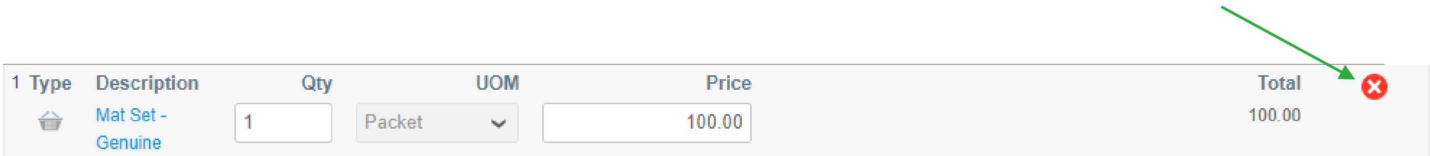
Invoicing for Part of an Order / Invoicing against an Order multiple times

If your attached invoice has multiple lines and your invoice pertains to only some of the order lines, you need to ensure that you **delete** the lines in Coupa that the attached invoice does not relate to.

1. *E.g.,* If the official invoice is only for line 1, then lines 2 and 3 will need to be removed from the Coupa invoice using the corresponding red **delete** buttons (see below)

2. The Total will update by itself each time you delete a line, and, assuming there are no further changes to make, the invoice is ready to submit.

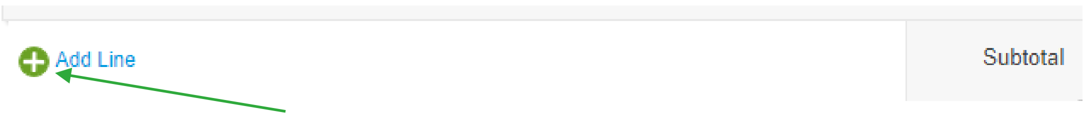
For future invoices against the same order, follow the same steps to ensure that what is being submitted agrees with the attached invoice.



Adding a Missing Invoice Line

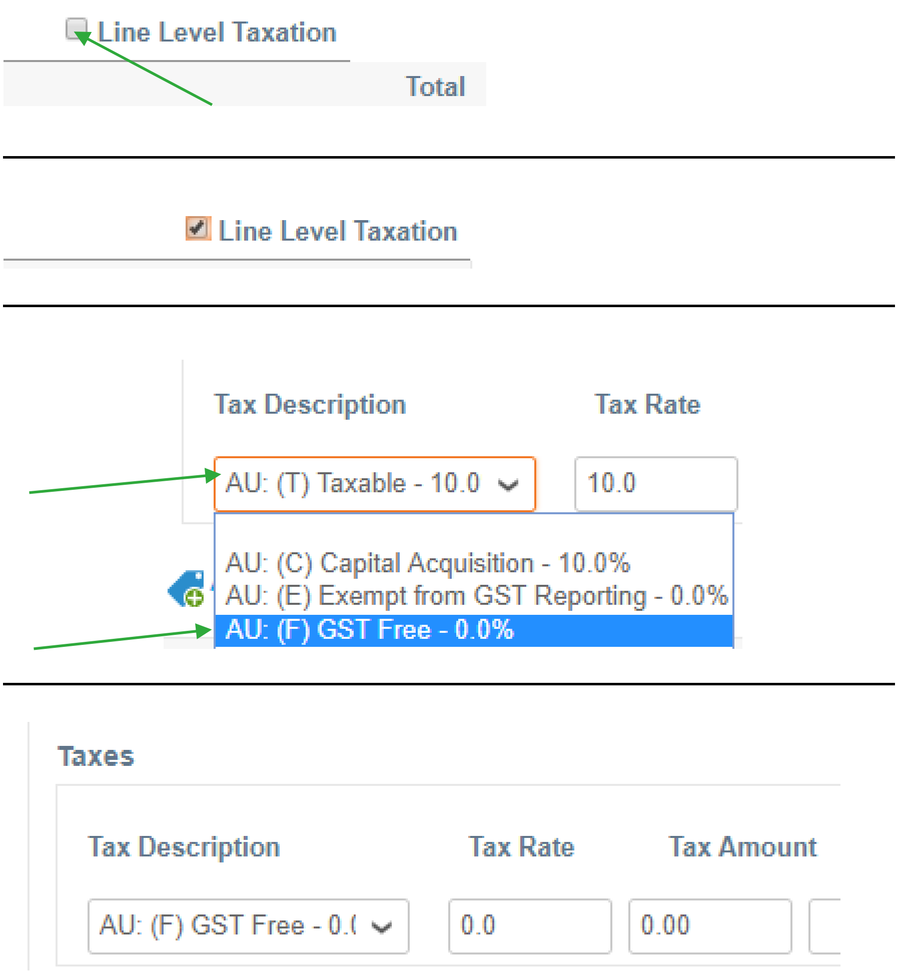
If you have extra charges to add that are not included on the purchase order, please contact **shared.purchasing@perentigroup.com** to request an additional order line (or lines) to be added. In this case, delete your draft invoice and wait for confirmation that the order has been revised, and then invoice against the Purchase order again.

If it is too late for the order to be revised, either a new Order will be required, or else you may need to add the extra invoice line as a non-backed order line. If this is the case, to add a non-backed line use the **Add Line** option in your draft invoice:



As per the *Basic Instructions*, ensure that you select **Calculate** and check that the **Total** displayed matches your official invoice's total and click **Submit** if you have no further changes to make.

GST Exempt Invoice Lines (Line Level Taxation)



1. If your attached invoice has any GST exempt invoice lines you will need to check the **Line Level taxation** box to bring up more options

2. Click on the **Tax Code** field for the invoice line that is GST exempt

3. Select the appropriate **Tax Code** option (based on its description) – e.g., “(F) GST Free” which will automatically update the tax rate and tax amount values.

4. Once your line-level tax updates have been made, click **Calculate** to update the Totals, then check that the total matches your attached invoice, and if no further changes are required click **Submit**.

Frequently Asked Questions

Signing Up for a Coupa Supplier Portal (CSP)

Q. How much does it cost to join?

There is no cost. The CSP is free to sign up to and to use. Neither Coupa nor Perenti charge suppliers to join or to use a Coupa Supplier Portal.

Q. Where do I register?

You need an invitation to join the Coupa Supplier Network. If you haven’t already received one, ask Perenti to send you an invitation email. (Contact us at **helpdesk.ap@ausdrill.com.au**)

Q. Where do I sign in?

You can sign into your CSP at **https://supplier.coupahost.com**

CSP Basics

Q. Where's the tab for Perenti?

Once you're signed into the CSP, if you don't have a tab for Perenti, it's probably because you registered for CSP using a different email address than Perenti used for the invite. Please contact Perenti and ask us to send another invite using the address you registered with.

Q. How do I see my customer's purchase orders?

You won't be able to see their purchase orders if your access hasn't been enabled for you. Contact Perenti and ask them to give you access by emailing us at **helpdesk.ap@ausdrill.com.au**

Q. What does "pending receipt" mean?

This status shows that Perenti is in the process of receiving the goods/services into their system. Once Perenti enters the receipt, the invoice will be matched against it.

Q. If I use the CSP, who pays me?

Perenti is still responsible for paying you directly. Coupa does not pay suppliers on behalf of buyers.

Purchase Orders

Q. How do I create an invoice that isn't backed by a purchase order?

All purchases made from go-Live must be backed with a purchase order unless agreed with Perenti. Please email **helpdesk.ap@ausdrill.com.au** for details.

Q. What is the purpose of PO acknowledgment by the supplier?

This button lets Perenti users know that you have seen the PO. You are strongly encouraged to use this feature.

Invoicing

Q. How do I create an invoice?

Click on the Perenti tab and then select Purchase Orders (PO). Choose the PO you would like to invoice, and then click on the yellow pile of coins to create an invoice.

Q. How do I create an invoice if there's no purchase order?

Please contact **helpdesk.ap@ausdrill.com.au** if this is the case, and we will provide our instructions for non-PO-backed invoicing

Q. How do I know if an invoice has been submitted?

When you sign in, go to your Perenti tab and click the **Invoices** tab to see a searchable list of your submitted invoices.

Q. Why can't I edit/void/delete an invoice?

You can delete any draft invoice you create. Once an invoice has been submitted, it can't be changed in any way. Ask Perenti to reject or void the existing invoice. You can then create a new one.

Q. How do I credit or cancel an invoice that's already been billed.

If you need to send a credit note that relates to a Purchase order, please email the credit note to **helpdesk.ap@ausdrill.com.au**. If you have a non-backed credit note, please contact **helpdesk.ap@ausdrill.com.au** for instructions.

Q. What does the Export button do?

This button allows you to export the rows in view to an Excel document.

Getting Paid

Q. Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is in Perenti's queue and you'll be paid based on the payment terms you have with Perenti.

Q. What do I do if an invoice was disputed?

Find the invoice in your invoices tab and use the available action icon to resolve the dispute.

Q. What if I have an invoice that hasn't been paid?

For questions regarding payment information, contact the Perenti Business Group contact directly or email to **helpdesk.ap@ausdrill.com.au**

Managing Your CSP Account

Q. How do I add an employee from my Business?

Please refer to these instructions: **Manage Users** - **https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Administer_the_CSP/02_Manage_Users**

Q. How do I update my banking information for direct deposits?

Your banking information is stored in Perenti's ERP system (Pronto-Xi), and not stored in Coupa. Contact Perenti directly with the updated information. This will be required to be submitted on Company letterhead (email **helpdesk.ap@ausdrill.com.au**)

Q. What options are available for me to submit invoices to my customers?

There are two options to submit invoices to Perenti:

1. The Coupa Supplier Network, where you sign in to manually flip a PO to create an invoice
2. cXML, where you can automate the process of sending an invoice file using Coupa's standard cXML format