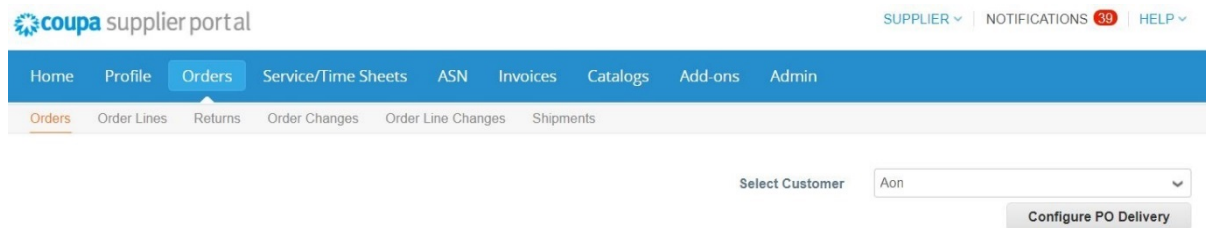


## Supplier Invoicing

There are two ways to create electronic invoices – via the Coupa Supplier Portal (CSP) and the purchase order email (as known as “flipping the PO”).

### Create PO Backed Invoice via CSP

1. Log into [CSP](#).
2. Select **Orders** tab.



3. Find the PO you would like to flip into an invoice. You can either scroll through the list of POs or search for it. Once you have found the specific PO row, under the Actions column, click the 📄 icon to flip the PO into an invoice.

### Purchase Orders

**Instructions From Customer**  
Please acknowledge the purchase order. For timely payments, please put EFT details on your invoice.

Click the 📄 Action to Invoice from a Purchase Order

							View	All	Search
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions	
GB0081000187428	05/07/20	Issued	None	testuk3 1 Each of testuk4	No	150.00 GBP		📄 📄 📄	
GB0041000187427	05/07/20	Issued	05/15/20	10 Each of testuk2	No	100.00 GBP		📄 📄 📄	
GB0091000187426	05/07/20	Issued	None	testuk1	No	100.00 GBP		📄 📄 📄	

4. The page refreshes to display the **Create Invoice** screen.
  - 4.1. The **Choose Invoicing Details** pop-up window will be displayed. Select the address you would like to remit- to by clicking **Select** (continue to step 6).

**Note:** If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored within the system, Coupa will ask you to create one.

Choose Invoicing Details
✕

\* **Legal Entity**  + Add New

**Invoice From** addressuk1  
cityuk1  
87654  
United Kingdom  
United Kingdom (GB123456789)

\* **Remit-To**  + Add New

\* **Ship From Address**  + Add New

4.2. If the correct Remit-To Address does not appear and you would like to add an address, then use the button “**Add New**”.

**Note:** *If you submit an invoice with a new Remit-To address, the invoice will be put on hold until the new address is approved by the Aon Accounts Payable team. When you submit the invoice, you will receive a message stating that the invoice is on hold.*

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Add-ons
Admin

Invoices
Payment Receipts

Select Customer

## Invoices

Create Invoices i

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
None	05/18/20	Draft	GB0041000187427	100.00 GBP	No	

5. On the **Create Invoice** screen, input information into the required fields. Note that required fields are

indicated by an asterisk.

- Invoice #
- Invoice Date
- Currency



# Create Invoice Create

## General Info

## From

* Invoice #	<input type="text"/>	* Supplier	SUPL-000048686-GB
* Invoice Date	05/18/20	* Supplier VAT ID	GB123456789
Payment Term	30D	* Invoice From Address	testuk addressuk1 cityuk1 87654 United Kingdom LTD.
Date of Supply	05/18/20	* Remit-To Address	testuk addressuk1 cityuk1 87654 United Kingdom
* Currency	GBP	* Ship From Address	testuk addressuk1 cityuk1
Delivery Number	<input type="text"/>		
Status	Draft		
Image Scan	<input type="button" value="Choose File"/> No file chosen		
Supplier Note	<input type="text"/>		
Attachments	<a href="#">Add File</a>   <a href="#">URL</a>   <a href="#">Text</a>		

**Note:** Please click [here](#) to familiarize yourself with the Coupa compliant invoicing requirements. If you are located in a country, listed here, you are not required to complete the 'image scan' section. If the country you are invoicing us from is not listed, a scan of the original invoice in PDF must be attached in the "Image Scan" section when submitting your invoice.

6. As you scroll down the page, in the Lines section you will find more fields to input information.

### For Goods PO:

6.1. Enter a price in the **Price** field.

☰ Lines

Type	Description	Price	
	testuk1	<input type="text" value="100.00"/>	100.00
PO Line	Contract	Supplier Part Number	Service Expiration Date
GB0091000187426-1		<input type="text"/>	None

6.2. Enter the quantity in the **Quantity** field.

☰ Lines  Line Level Taxation

Type	Description	Qty	UOM	Price	
	testuk2	<input type="text" value="10"/>	Each	<input type="text" value="10.00"/>	100.00
PO Line	Contract	Supplier Part Number	Service Expiration Date		
GB0041000187427-1		<input type="text"/>	None		



For Services PO:

6.3. Enter a price in the **Price** field.

☰ Lines

Type	Description	Price	
	testuk1	100.00	100.00

PO Line GB0091000187426-1	Contract <input type="button" value="v"/>	Supplier Part Number <input type="text"/>	Service Expiration Date None
------------------------------	--	--	---------------------------------

7. Enter any shipping and handling information

**Totals & Taxes**

Lines Net Total	100.00
Lines VAT Totals	0.00


---

Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>

---

Total VAT	0.00
Net Total	100.00
<b>Gross Total</b>	<b>100.00</b>

8. Enter the tax information in the **VAT Rate** (Tax Description) fields or under each PO line, if applicable. Click **Calculate**, then **Submit**.

8.1. Attach a copy of the original invoice (except Canada, United States and United Kingdom,  Germany and the Netherlands).

9. After submitting, the page will refresh to display the invoice is processing.



## Invoices

SUPL [redacted] -GB invoice #test1uk is processing X

Create Invoices i

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
test1uk	05/07/20	Processing	GB0091000187426	105.00 GBP	No	

**Note:** If you submitted the invoice with a new Remit-To address, the status will display as 'On Hold.'

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

10. If you do not want to submit the invoice immediately, you can also save it for later. Click **Save as draft**.

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)

11. The **new Remit-To** can be also added in the Legal Entity Setup section in the Admin tab.

Admin [Legal Entity Setup](#) [Add Legal Entity](#)

[Users](#)

[Merge Requests](#)

[Legal Entity Setup](#)

Legal Entity	Actions
testuk	<a href="#">Actions</a>

11.1. Click **Add Legal Entity** and input the correct address, contact, and customers.

11.2. Click **Add New**.

12. You can then return to your invoice previously saved as draft by clicking the **Invoices** tab from the panel.

12.1. Select the edit icon below the Actions column of the invoice you were working on initially.

## Invoices

Create Invoices i

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

[Export to](#) View All v Search m

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	05/18/20	Draft	GB0081000187428	50.00 GBP	No	<a href="#">Edit</a> <a href="#">Delete</a>

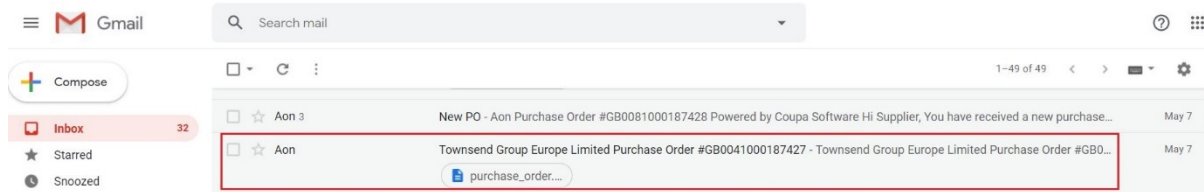


## Supplier Invoicing – from your PO Email address

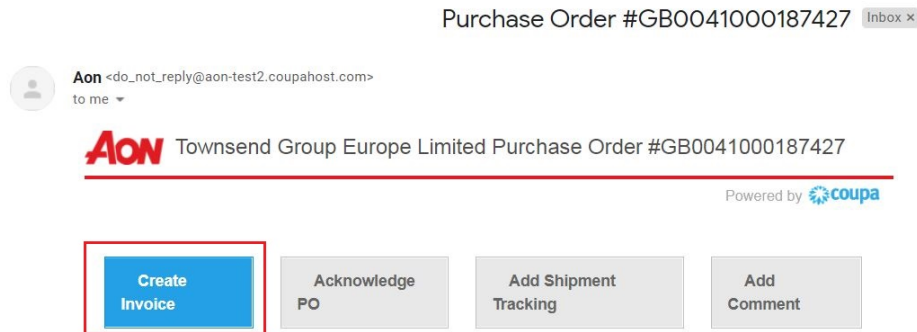
The PO will be automatically emailed to the Supplier.

1. Log in to your email account. POs will show up as **Coupa Notifications** in your mailbox. Note: POs will be issued to a PO email address confirmed by the supplier and not to the primary contact email address (unless they are identical). Contact GSM Helpdesk Mailbox at [gsmhelpdesk@aon.com](mailto:gsmhelpdesk@aon.com) if you are unsure which email you currently have on file or need to update.

2. Select the email of the PO you would like to flip into an invoice.



3. Click **Create Invoice**.



4. The other option for suppliers is to acknowledge the PO and then proceed to invoicing:

4.1. Click **Acknowledge PO** in the email message. This opens Coupa in a new browser window/tab and you see the message 'Order Acknowledged.'

4.2. On the Coupa screen, click **Create Invoice**.

Purchase Order #GB0041000187427

Status	Issued - Sent via Email
Order Date	05/07/20
Revision Date	05/07/20
Requester	Kinga Laburda
Email	kinga.laburda@aon.com
Payment Term	30D
Attachments	None
Acknowledged	<input checked="" type="checkbox"/>
Assigned to	<input type="text" value="Select"/>

Shipping	
Ship-To Address	1205 Upgrade street San Mateo, CA 11111 United States Location Code: 3010 Attn: Kinga Laburda
Terms	Best Way
Shipment Tracking	<input type="text" value="No shipment tracking."/> <a href="#">Add</a>

Total 100.00 GBP

Create Invoice

Save

Print View

**Note:** It is recommended to acknowledge a PO when Aon sends in the order.

5. Based on whichever option you choose, you will reach the **Create Invoice** screen.

5.1. The **Add Legal Entity** pop-up window will display. Select the address you would like to remit to by clicking **Select**.

**Note:** If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored within the system, Coupa will ask you to create one.

5.2. If the correct remit-to address does not appear, click **Add New**.

Choose Invoicing Details ✕

\* Legal Entity  + Add New

Invoice From addressuk1  
cityuk1  
87654  
United Kingdom  
United Kingdom (GB123456789)

\* Remit-To  + Add New

\* Ship From Address  + Add New

Cancel

**Note:** If you create a new address, the invoice will be put “on hold” as the new remit-to address will need to be approved by the Aon Accounts Payable team.

6. On the **Create Invoice** screen, input the invoice number into the **Invoice #** field. Note that all other required fields are indicated by an asterisk.



## Create Invoice Create

### General Info

### From

* Invoice #	<input type="text"/>	* Supplier	SUPL-000048686-GB
* Invoice Date	05/18/20	* Supplier VAT ID	GB123456789
Payment Term	30D	* Invoice From Address	testuk addressuk1 cityuk1 87654 United Kingdom LTD.
Date of Supply	05/18/20	* Remit-To Address	testuk addressuk1 cityuk1 87654 United Kingdom
* Currency	GBP	* Ship From Address	testuk addressuk1 cityuk1
Delivery Number	<input type="text"/>		
Status	Draft		
Image Scan	<input type="button" value="Choose File"/> No file chosen		
Supplier Note	<input type="text"/>		

Attachments Add [File](#) | [URL](#) | [Text](#)

**Note:** Please click [here](#) to familiarize yourself with the Coupa compliant invoicing requirements. If you are located in a country, listed here, you are not required to complete the 'image scan' section. If the country you are invoicing us from is not listed, a scan of the original invoice in PDF must be attached in the "Image Scan" section when submitting your invoice.

7. Scroll down to the **Lines** section and ensure all details are accurate, specifically the Price and the Quantity.

7.1. For Canada and UK: Select a tax code from the **Tax Code** dropdown and click **Calculate** and then **Submit**.

7.2. For United States: Do not modify the Tax Code Field. Manually enter the **exact value** (dollar and cents) in the **VAT Amount** field, click **Calculate**, then **Submit**.

7.3 Attach a copy of the original invoice in the Image Scan field (except Canada, United States, United Kingdom, Germany and the Netherlands).

8. Keep the checkbox selected if you wish to receive email updates about the invoice status.

9. When you complete your edits, enter any comments for Aon and then click **Submit**.

### Comments

Enter Comment

10. You will be updated via the primary contact email address about the processing status.

Aon University

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Last Updated: December 2023





## PO Backed Credit Note

For a credit note that you need to submit to Aon, you should submit the credit note in PDF to the respective Aon Coupa inbox from your registered email address.

The Aon Accounts Payable team will follow their internal processes for handling and creating the credit note in Coupa. You will be updated via the primary contact email address about the processing status.

## Attaching a File to an Invoice

Suppliers registered in countries different than US, Canada, UK and the Netherlands are required to attach either an image or a .pdf version of their invoice to each electronic Coupa invoice.

## Creating the invoice

Create the invoice from either the CSP or Email Flip as you normally would ensure all required fields are populated.

## Attaching the file

Select the "Choose File" button located near the "Image Scan" field. Please note: Do not upload an invoice under the attachments section as this is not as visible to the Aon team and they may need to request an invoice document