

BD Invoicing Method

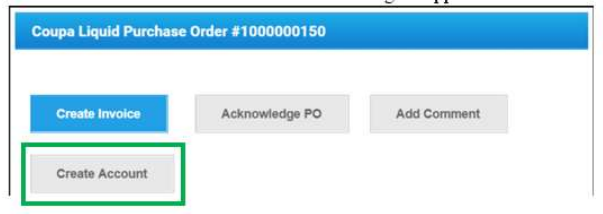
BD's preferred PO backed invoice submittal method is electronic invoicing. We are committed to making payments as efficiently as possible, therefore; BD will be phasing out paper and PDF invoicing. BD has collaborated with Coupa to provide 3 electronic invoicing options: PO Flip Invoices from [Coupa Supplier Portal \(CSP\)](#), [Supplier Actionable Notification](#), or [Coupa cXML](#) integrated invoicing.

How Do I Enroll?

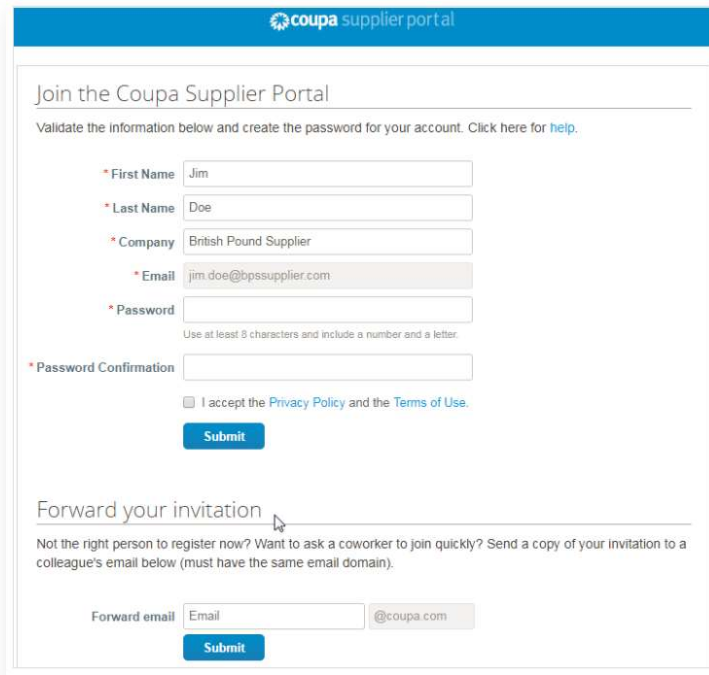
1) Coupa Supplier Portal (CSP)

Create invoices directly from purchase orders on the Coupa Supplier Portal. This is the most comprehensive way to manage your interactions with BuySmart (Coupa). This method is ideal for suppliers with low to medium volume purchase orders and invoices, or suppliers who want to view all transactions from their customers who use BuySmart (Coupa) in one place.

- Emailed PO's contain an Action button allowing a Supplier to create a CSP Account



- Select “Create Account” Fill in the mandatory fields to provide basic information for your account or forward the invitation to the correct coworker



The screenshot shows the 'Join the Coupa Supplier Portal' registration form. It includes the following fields and options:

- * First Name: Jim
- * Last Name: Doe
- * Company: British Pound Supplier
- * Email: jim.doe@bpssupplier.com
- * Password: (empty field)
- Use at least 8 characters and include a number and a letter.
- * Password Confirmation: (empty field)
- I accept the [Privacy Policy](#) and the [Terms of Use](#).
- Submit button

Below the registration form is a section titled 'Forward your invitation' with the text: 'Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain).'

Forward email: Email [input field] @coupa.com

Submit button

BD BuySmart (Coupa) e-Invoice Enablement Guidelines



- To create a CSP account, you must also accept the Privacy Policy and the Terms of Use.
- If you are experiencing any errors, please submit a [BuySmart \(Coupa\) e-Invoicing Process Ticket](#).

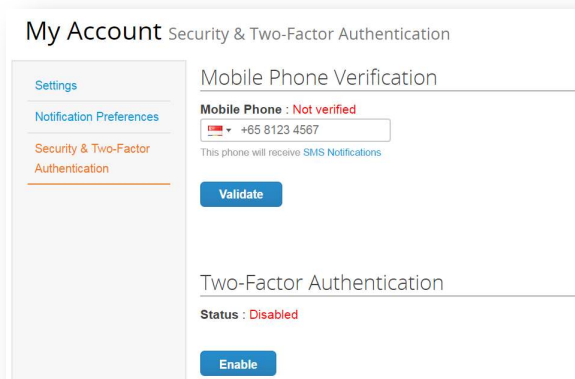
Warning: Invitations to CSP expire within 30 days

Security & Two Factor Authentication

Enable Security & Two-Factor Authentication for better security. Follow the on-screen instruction for installing and using Google Authenticator.



Note: This is optional; Suppliers can opt not to enable this feature.



- To login, go to supplier.coupahost.com and in the Log In pane on the right hand side, enter your email address and password and click Log In.

BD BuySmart (Coupa) e-Invoice Enablement Guidelines



Note: If you forgot your password, just click the ‘Forgot your Password?’ link to reset your password.

The screenshot shows the Coupa supplier portal interface. On the left is the 'Register' section with fields for First Name, Last Name, Company, and Email, and a 'Register' button. On the right is the 'Log In' section with fields for Email Address (pre-filled with 'supplier@company.com') and Password, a 'Log In' button, and a 'Forgot Your Password?' link.

2) Supplier Actionable Notification (SAN)

Allows supplier to act on PO's directly from email notifications for PO's created in BuySmart (Coupa), having the options to acknowledge, create an invoice from, and add a comment to a PO.

- All Suppliers receiving PO's via email receive the options below in the PO email transmission. Example:

The screenshot shows an email notification for a 'Coupa Liquid Purchase Order #1000000150'. Below the header, there are four buttons: 'Create Invoice' (highlighted with a green border), 'Acknowledge PO', 'Add Comment', and 'Create Account'.

- If you do not see these options on your PO email or the buttons are not working, please create a [BuySmart \(Coupa\) e-Invoicing Process](#) ticket

3) Coupa cXML Integrated Invoicing

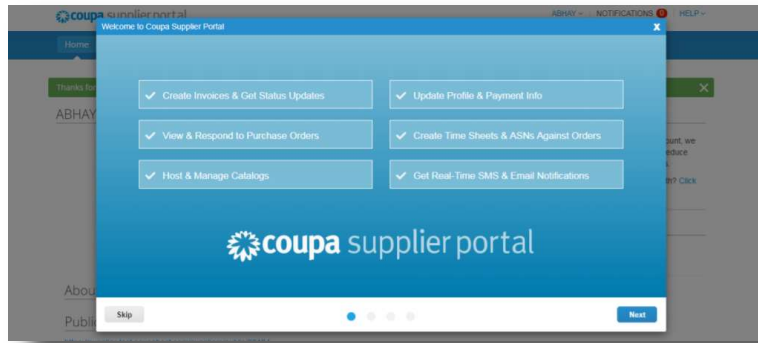
System integration with BuySmart (Coupa) allows you to send cXML invoices directly to BuySmart (Coupa). Suitable for suppliers with a high volume of purchase orders, or those who automate their invoicing.

- For Suppliers interested in cXML integration please fill out the [Coupa cXML Supplier Questionnaire](#) and submit a [BuySmart \(Coupa\) e-Invoicing Process](#) Ticket.

BD BuySmart (Coupa) e-Invoice Enablement Guidelines

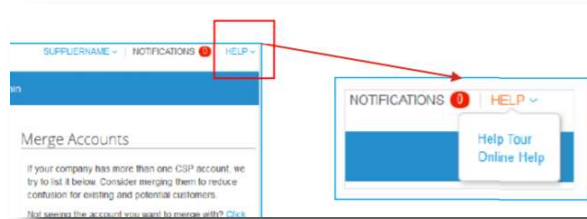


Welcome Tour



When you first log in, Coupa takes you on a tour of the portal.

You can click on CSP Online Help – in the top right corner of the page to access the Online Help or to view the Help Tour at any time



Invoicing Requirements and Country Specifications

For BD to be able to pay your company on-time:

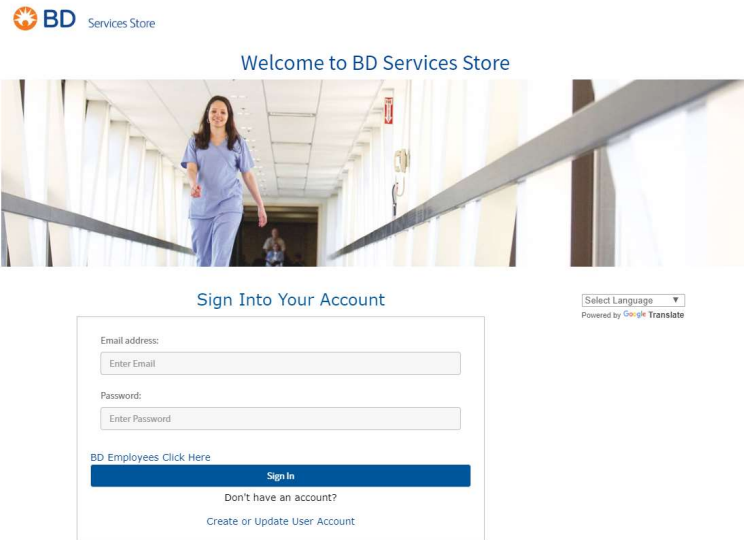
- Your Invoices and Credit Memos must meet all relevant country, legal, tax and BD requirements.
- If your invoices and credit notes do not meet all legal, tax, and BD requirements, BD will “Dispute” these back to you. BD will provide comments with the reason why your invoice or credit note has been returned.
- You will be asked to resubmit your invoice or credit note once it is compliant with these requirements.
- BD reserves the right to have payment terms begin only when BD receives a compliant invoice or credit note (North America and Europe only).

CSP & SAN Requirements North America (Bill to)

[Coupa Supplier Portal \(CSP\) & Supplier Actionable Notification \(SAN\) Requirements - North America](#)

How Do I submit a *BuySmart (Coupa) e-Invoicing Process Ticket*?

- Log in / Create an account on <http://www.bd.com/services> using Google Chrome

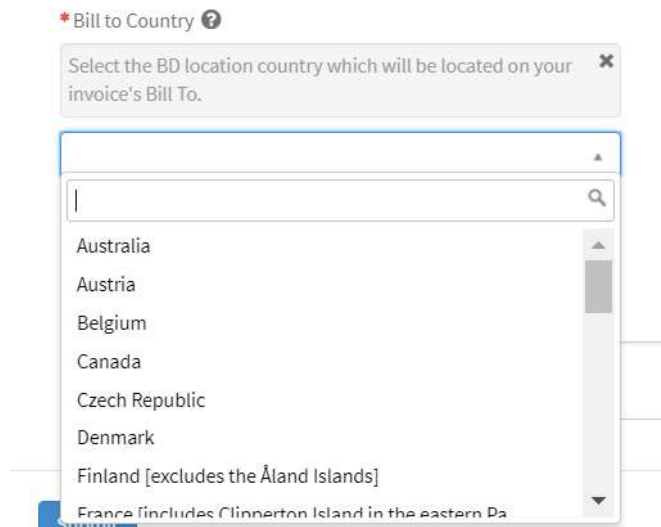


- Click on *BuySmart (Coupa) e-Invoicing Process Catalog*



BuySmart (Coupa) e-Invoicing

- Select Bill to Country (the BD Country located on the invoices Bill To Address)



BD BuySmart (Coupa) e-Invoice Enablement Guidelines



- Select type of inquiry: “Assistance with Error Needed” or “Enable New cXML Account”

* Request Type

- None --
- Enable New cXML Account
- Need Assistance With Error

- Select e-Invoicing Method: Coupa Supplier Portal (CSP), Supplier Actionable Notification (SAN), or cXML

* Error Type

- None --
- Coupa Supplier Portal (CSP)
- cXML
- Supplier Actionable Notification (SAN)

- Fill out the requested information (any items with a * are mandatory)

APPENDICES

Appendix A | Coupa Supplier Portal (CSP) & Supplier Actionable Notification (SAN) Requirement - North America


North America- United States and Canada

When creating Invoices or Credit Memos using CSP and SAN, please ensure to complete all the mandatory fields marked with a red “*”. Please also confirm the basic requirements are followed:

Invoices

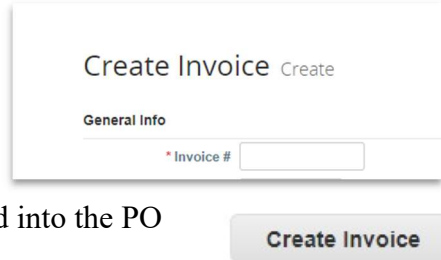
- Invoices can only have positive value (+)

For CSP:

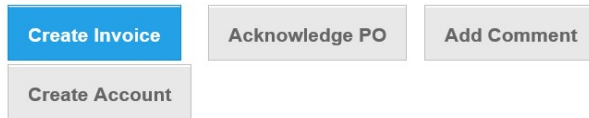
- Invoice can only be created by :
 - Selecting the yellow coins by the PO 
 - Selecting “Create Invoice” when you have clicked into the PO

For SAN:

- Invoice can only be created by :
 - Selecting “Create Invoice” from the PO email




Form titled "Create Invoice" with a "Create" button. Under "General Info", there is a field for "Invoice #" with a red asterisk indicating it is mandatory. A "Create Invoice" button is located at the bottom right.

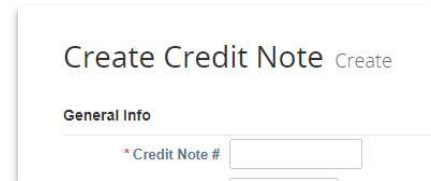


A row of four buttons: "Create Invoice" (highlighted in blue), "Acknowledge PO", "Add Comment", and "Create Account".

Credit Memos

For CSP:

- Credit memos can only be created by:
 - Selecting the red coins by the PO 
- Credit memos can only have a negative value (-)
 - If a QTY based PO; the qty must be (-) and the price must be (+) so that the total is (-)



Form titled "Create Credit Note" with a "Create" button. Under "General Info", there is a field for "Credit Note #" with a red asterisk indicating it is mandatory.

Type	Description	Qty	UOM	Price
	test	-1.00	each	98.00
Total				-98.00

Note: Green circles and checkmarks highlight the Qty (-1.00) and Total (-98.00) fields. A "Correct" stamp is placed over the table.

Type	Description	Price
	test	-200.00
Total		-200.00

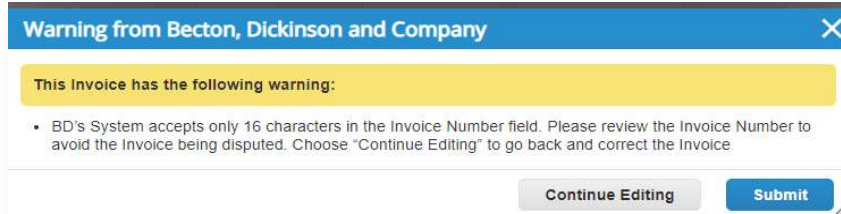
Note: Green circles and checkmarks highlight the Price (-200.00) and Total (-200.00) fields. A "Correct" stamp is placed over the table.

If a AMT based PO (No QTY option); the price must be (-), so that the total is (-)

Both Credit Memos / Invoices

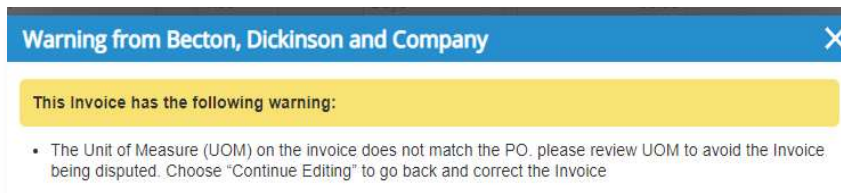
Length

- Invoice/Credit Memo number can only be **16 digits**
 - Please **DO NOT** ignore the warning message that appears on the screen



Unit of Measure


- The **UOM** must match what is on the original PO
 - Please **DO NOT** ignore the warning message that appears on the screen

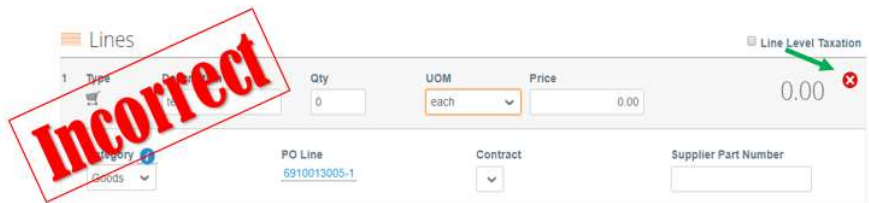


Currency

- The **Currency** must match what is on the original PO

Lines

- If the Invoice/Credit Memo does not include one of the lines on a PO, please **DELETE** that line from the Invoice/Credit Memo by selecting the . **DO NOT** leave a "0" QTY and/or "0" PRICE Line.



Decimal Place

- BD only allows pricing and quantity up to two decimal places

Qty	Unit	Price	Total
30,000	each	0.0975 USD	2,925.00 USD

Both Credit Memos / Invoices Cont'd

Miscellaneous and Handling

- No “Miscellaneous” or “Handling Charges” are allowed



Shipping

- Any shipping and handling charges should be enter in the “Shipping”

Note: Suppliers should be using one of BD’s shipping accounts for all standard deliveries. Please contact your BD buyers for more information.



Tax

- Taxes should only be entered in the last “Tax” field located in the *Totals & Taxes* area

Note: BD has direct pay authority to the state of Florida, Indiana, Nebraska, New Jersey, North Carolina, South Carolina, Texas, and Utah.

