

How to Handle Disputed Invoices in Coupa Supplier Portal (CSP)



Background:

Kaiser Permanente (KP) requires suppliers to comply with the Invoice and Accounts Payable Requirements when submitting an invoice for payment. Failure to follow the requirements will result in invoices not being processed and returned to the Supplier.

When an invoice is submitted in Coupa, it goes through a matching and tolerance limit process involving the invoice and the related Purchase Order (PO). If matching discrepancies are found that exceeds allowable tolerance limits, Coupa can auto dispute the invoice, or the Procurement Buyer team can dispute the invoice that leads to the invoice being rejected and returned to the supplier to correct the discrepancy.

This Quick Reference Guide (QRG) covers:

- Scenarios when Coupa auto disputes the invoice
- Scenarios when the Procurement Buyers can dispute the invoice
- Step-by-step instructions that the Suppliers need to follow to resolve such disputes in the CSP

Primary Audiences:

- Suppliers
- Procurement Buyers



How to Handle Disputed Invoices in CSP



Scenarios for Tolerance Failure - Tolerance failures can occur if there are discrepancies in price, quantity, date, or any other variance in an invoice. Listed below are the scenarios:

Tolerance Failure Name	Condition
Invoice backdate	This tolerance failure occurs when the invoice date is backdated more than specified calendar days.
Invoice miscellaneous amount	This tolerance failure occurs when the miscellaneous charges are greater than the set tolerance limit.
Invoice miscellaneous %	This tolerance failure occurs when the miscellaneous charges are greater than 10% of the total invoice amount. The amount includes shipping and tax.
Tax tolerance	This tolerance failure occurs when the taxes mentioned in the invoice are not correct. Taxes are not calculated in Coupa. They are calculated in OneLink using a system called Vertex. The purpose of tax tolerance is to stop a very egregious tax charge.
Invoice shipping amount	This tolerance failure occurs when the shipping amount is greater than the tolerance limit.
Invoice shipping %	This tolerance failure occurs when the shipping charges are greater than 10% of the total invoice amount.
PO currency	This tolerance failure occurs when the invoice currency does not match the PO currency.
PO line price %	This tolerance failure occurs when the invoice line unit price differs from PO line unit price.
PO over invoiced amount	This tolerance failure occurs when the Invoice amount is 1000 USD over the PO amount (for amount-based invoices only).
PO over invoiced amount %	This tolerance failure occurs when the Invoice amount is 10% over the PO amount (for amount-based invoices only).
PO over invoiced quantity %	This tolerance failure occurs when the invoice quantity is greater than PO quantity.

For questions email S2P-Transformation-Info@kp.org

How to Handle Disputed Invoices in CSP



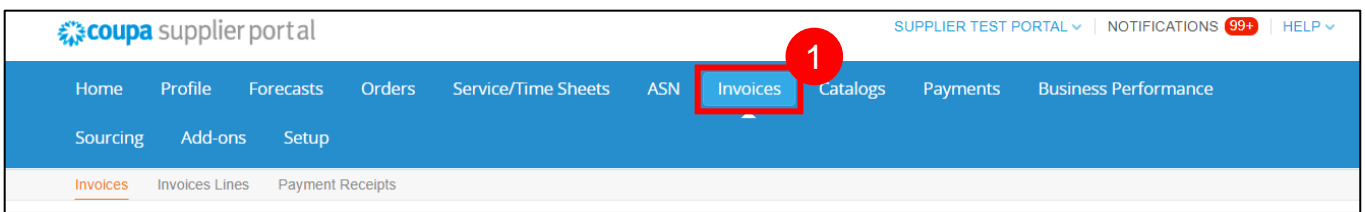
Suppliers can view their disputed invoices in the CSP and resolve them in the following ways:

- Voiding the invoice and submitting a new and corrected invoice as needed
- Correcting the invoice and resubmitting it

Voiding the Invoice:

Suppliers can void an invoice which cancels the current invoice. Suppliers can then submit a new invoice if necessary. Follow the below steps to void an invoice:

1. Navigate to the **Invoices** tab from the CSP homepage



2. Select the **Disputed** option from the **View** dropdown
3. Search the invoice by entering the invoice number in the **Search** bar and pressing the Enter key

A list of disputed invoices with the dispute reason is displayed.

4. Click the **Resolve** button under the **Actions** column against the invoice you want to void

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices ⓘ

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

Export to **View** Disputed Search

Invoice #	Invoice Date	PO #	Total	Disputed Date	Commented	Dispute Reason	Comments	Actions
S2P_SOXUAT_56_Disputed	12/11/23	K000000097	4,327.93	12/11/23	None	Duplicate Invoice. Already paid or payment review in progress.		Resolve

Per page 15 | 45 | 90

For questions email S2P-Transformation-Info@kp.org

How to Handle Disputed Invoices in CSP



The selected invoice is opened.

Invoice #S2P_SOXUAT_56_Disputed. [Back](#)

Please review the invoice and determine the resolution option: ▼

General Info Bill To & Ship To

Invoice # S2P_SOXUAT_56_Disputed.	Supplier W W GRAINGER INC
Invoice Date 12/11/23	Invoice From Grainger
Payment Term Net 30 Days	Grainger
Currency USD	New York, CA 123456
	United States

5. Scroll down to the **Comments** section and add comments to justify the reason for voiding the invoice in the **Enter Comment** field
6. Click the **Add Comment** button
7. Scroll up and click the **Void** button under the **Totals & Taxes** section to void the invoice

Totals & Taxes

Lines Net Total	4,047.93
Header Tax Totals	0.00
<hr/>	
Shipping	280.00
Misc	0.00
<hr/>	
Total Tax	0.00
Net Total	4,327.93
Total	4,327.93

7 Void Correct Invoice

Comments Mute Comments ▼

5 Enter Comment

Invoice is voided|

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

Send Comment notification to a user by typing @name (ex. @JohnSmith)

6 Add Comment

How to Handle Disputed Invoices in CSP



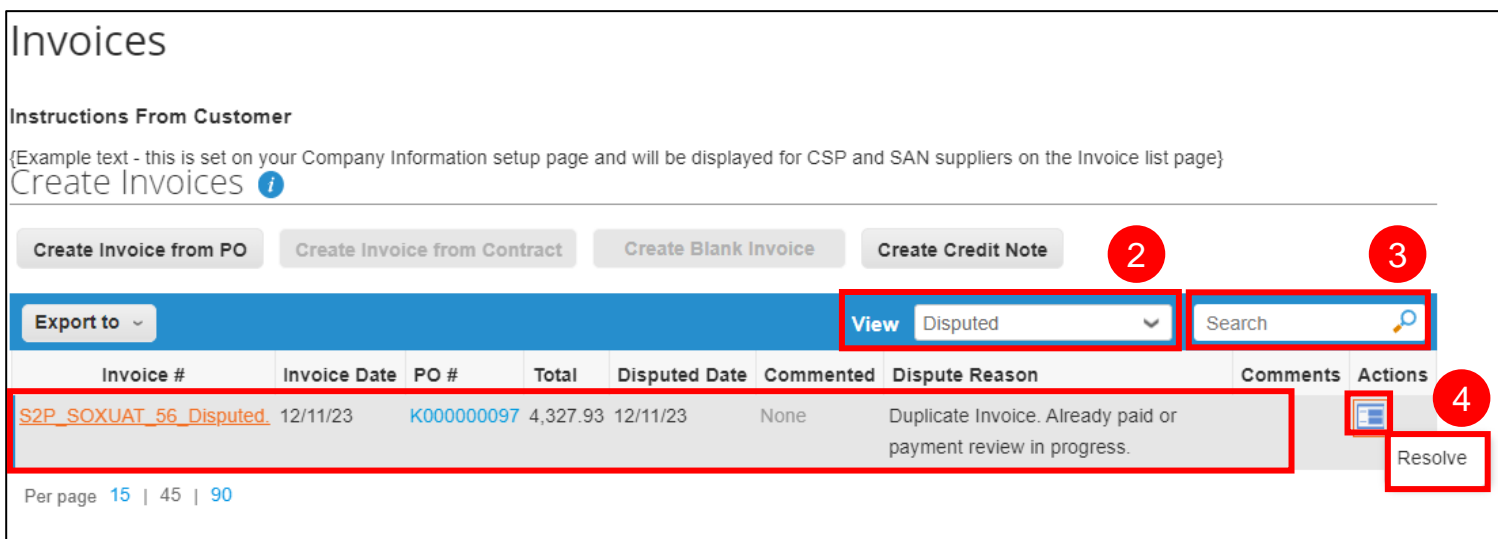
Correcting the Invoice:

For instances where incorrect item information (incorrect quantity, price, part#, or other charges) are on the invoice, Suppliers can correct the current invoice information and submit it back to the Procurement Buyer to resolve the dispute. Follow the steps below to update an invoice:

1. Navigate to the **Invoices** tab from the CSP homepage



2. Select the **Disputed** option from the **View** dropdown
 3. You can search the invoice by entering the invoice number in the **Search** bar
- The list of disputed invoices will be displayed with the dispute reason
4. Click the **Resolve** button under the **Actions** column against the invoice you want to correct



For questions email S2P-Transformation-Info@kp.org

How to Handle Disputed Invoices in CSP



The selected invoice is opened.

5. Scroll down to the **Totals & Taxes** section and click the **Correct Invoice** button

Invoice #S2P_SOXUAT_56_Disputed. [Back](#)

Please review the invoice and determine the resolution option: ▼

General Info

Invoice # S2P_SOXUAT_56_Disputed.
 Invoice Date 12/11/23
 Payment Term Net 30 Days
 Currency USD

Bill To & Ship To

Supplier W W GRAINGER INC
 Invoice From Grainger
 Grainger
 New York, CA 123456
 United States

Lines

Line	Description	Supplier Part Number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line	Service/Time Sheet Line
1	TK1384582T Laminating Machine Hot Length 18 1/2 in Width 48 1/2 in Height 18	447X86	EA			1	4,047.93	4,047.93	K000000097-	None 1
Work Order # None										

Totals & Taxes

Lines Net Total	4,047.93
Header Tax Totals	0.00
<hr/>	
Shipping	280.00
Misc	0.00
<hr/>	
Total Tax	0.00
Net Total	4,327.93
Total	4,327.93

Void 5 Correct Invoice

The invoice is now editable. All the fields are editable on the invoice except for the below:

Section	Field
Header	Payment Term
Header	Currency
Lines	Unit of Measurement (UOM)
Lines	Price

For questions email S2P-Transformation-Info@kp.org

How to Handle Disputed Invoices in CSP



You can scroll down and navigate to the **History** tab to view if the invoice is an auto disputed or a Buyer disputed invoice.

🕒 History ☑

On 03/17/24 at 09:53 PM, Coupa
[Auto Dispute Process]
Invoice delivery completed. Invoice received on behalf of Kaiser Permanente

Updated **Status** from Processing to Disputed

On 03/17/24 at 09:52 PM, Coupa
Legal invoice **created** on behalf of supplier

🕒 History ▼

On 12/11/23 at 01:30 AM, Vishwas Krishna acting as Wes Kaye
Updated **Status** from Pending Approval to Disputed
Invoice delivery completed. Invoice received on behalf of Kaiser Permanente

Updated **Status** from Processing to Pending Approval

Legal invoice **created** on behalf of supplier

For questions email S2P-Transformation-Info@kp.org

How to Handle Disputed Invoices in CSP



- After making the required changes, you can click the **Save as Draft** button to save the invoice and submit it later
 - Click the **Calculate** button to calculate the taxes
 - Add comments under the **Comments** section to justify the reason for correcting the invoice and click the **Add Comment** button to submit the comments
6. After correcting the invoice, click the **Submit** button to submit it

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	TK1384582T Laminating	1	Each	4,047.93	4,047.93 ✖

PO Line: K000000097-1 Service/Time Sheet Line: None Contract: TEST - W W Grainger Shell Cr Credit Line: None

Supplier Part Number: 447X86 Work Order #: None Billing: 8308-30000-7607-76955-KT001-KT21371----03502

[+ Add Line](#) [+ Pick lines from Contract](#)

Totals & Taxes

Lines Net Total: 4,047.93

Shipping:

Tax: % 0.000

Tax Reference:

Misc:

Tax: % 0.000

Tax Reference:

Tax: 0.000 % 0.000

Total Tax: 0.00

Net Total: 4,047.93

Total: 4,047.93 6

Comments [Mute Comments](#)

Enter Comment

Shipping charges corrected in the invoice|

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

How to Handle Disputed Invoices in CSP



After the invoice is corrected in CSP, it is routed back to the approval chain in Coupa. Once an invoice is **Approved** in Coupa, you can view the status under the **Invoices** tab in CSP.

coupa supplier portal SUPPLIER TEST PORTAL | NOTIFICATIONS 99+ | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogs Payments Business Performance

Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Invoices

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

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
testinv_dis1	03/20/24	Approved	K000001115	212.83	No		
testinv_dis	03/20/24	Voided	K000001115	714.83	No	Invalid or missing PO reference	
test CN	03/19/24	Approved	K000001093	-2,128.30	No		
None	03/18/24	Draft	K000001091	0.00	No		
None	03/18/24	Draft	K000001093	0.00	No		

After the invoice is approved, the invoice is routed to OneLink for payment.

For questions email S2P-Transformation-Info@kp.org