



Coupa Supplier Portal: Invoicing – Creating an Invoice from a Purchase Order

9/23/2021

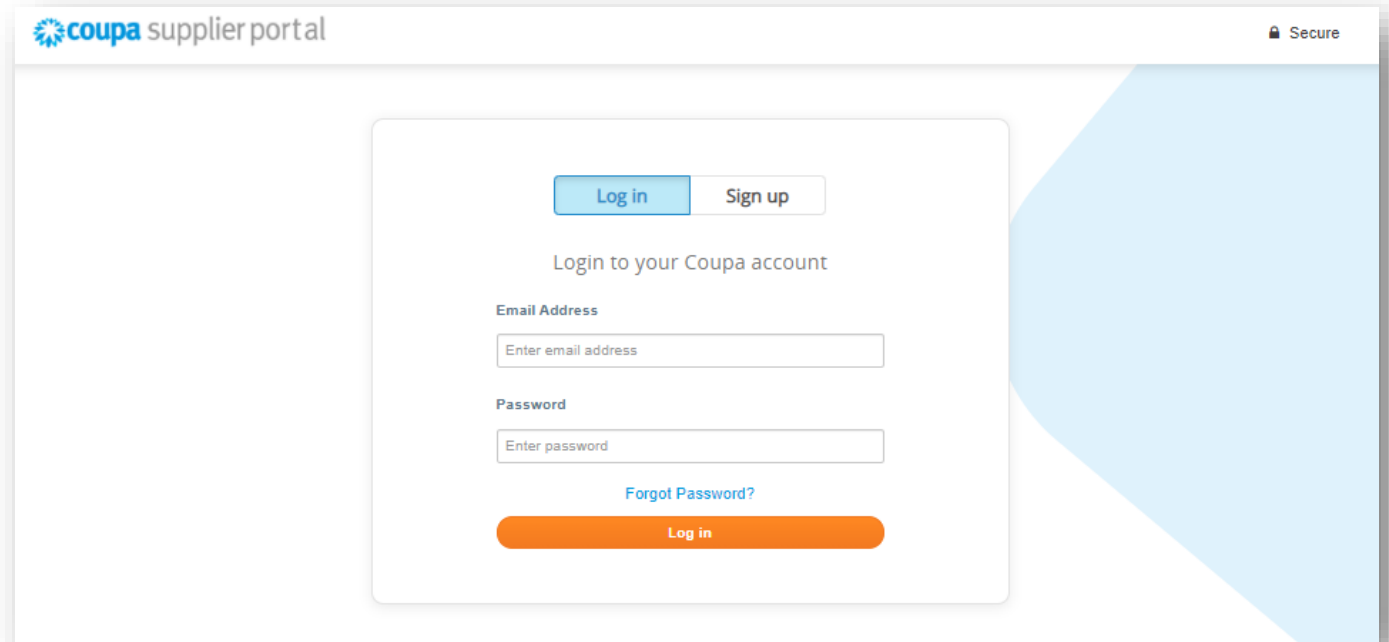
Creating an Invoice from a Purchase Order (PO)

Supplier Acknowledgment

UPS requires all invoices be presented with a valid, "vendor accepted" UPS PO number for payment. All invoices shall (a) reference the assigned project or work location and appropriation number (if applicable); (b) be itemized and substantiate all charges; and (c) include all delivery, installation, transportation and freight fees. Contractor shall submit its invoices to UPS in electronic form using UPS's processes, at UPS's sole discretion. "Vendor acceptance" of a UPS PO is required to ensure efficiency of service. UPS reserves the right to cancel any unaccepted PO. UPS reserves the right to reject any invoice without a valid UPS PO.

Creating an Invoice from a Purchase Order (PO)

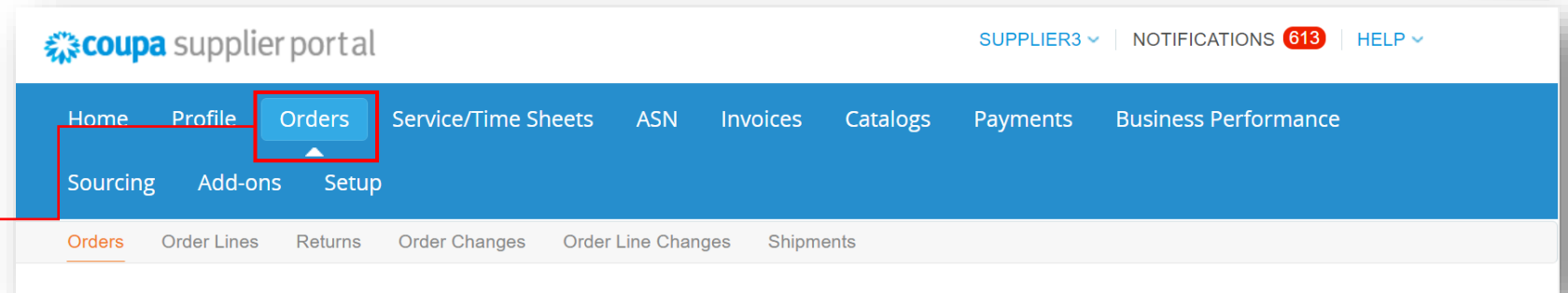
- Log into the Coupa Supplier Portal (CSP) at: <https://supplier.coupahost.com/>, using the previously established email address and password.
- For best results, Google Chrome is the recommended web browser.




The screenshot shows the Coupa Supplier Portal login interface. At the top left, the logo reads "coupa supplier portal". At the top right, there is a "Secure" indicator with a lock icon. The main content area features a central white box with a light blue background on the right side. Inside the white box, there are two buttons at the top: "Log in" (blue) and "Sign up" (white). Below these is the text "Login to your Coupa account". There are two input fields: "Email Address" with the placeholder "Enter email address" and "Password" with the placeholder "Enter password". Below the password field is a blue link for "Forgot Password?". At the bottom of the white box is a large orange "Log in" button.



Creating an Invoice from a Purchase Order (PO)

- Click the *Orders* tab on the navigation bar.
- On the *Purchase Orders* screen, locate the PO from which the invoice is to be created.
- Click the blue number in the *PO Number* column to open the purchase order.



Purchase Orders

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
COU1496	10/21/20	Issued	None	1 Each of Test Item	No	20.00 USD		
COU1473	10/15/20	Soft Closed	None	1 Each of Test Item	No	20.00 USD		
COU1471	10/15/20	Issued	None	2 Each of Test Item	No	20.25 USD		
COU1466	10/13/20	Closed	None	1 Each of Test Item	No	20.00 USD		
COU1461	10/13/20	Soft Closed	None	4.55 Work Hour of Test Item	No	45.50 USD		
COU1396	09/24/20	Soft Closed	None	1 Each of MBF8505_MI_REFRIGERATOR (REACH IN) 21.0 CU FT C... 1 Each of MBF8505_MI_REFRIGERATOR (REACH IN) 21.0 CU FT C...	No	2,778.00 USD		

Chat with Coupa Support

Creating an Invoice from a Purchase Order (PO)

- Acknowledge receipt of every purchase order by clicking in the *Acknowledged* checkbox.
- Once acknowledged, scroll down, click the *Create Invoice* button

Purchase Order #COU59634 | Revision 2 (Current) Sep 10

Status Issued - Sent Manually

Order Date 09/09/21

Revision Date 09/10/21

Requester MARIA IMELDA GAMIL

Email mgamil@ups.com

Payment Term NET 30

Attachments None

Acknowledged

Assigned to

Shipping

Ship-To Address UPS-SCS LS
4071 North Service Rd
Burlington, ON L7L 4X6
Canada
Location Code: ONBULLO2669
Attn: MARIA IMELDA GAMIL

Terms Destination

Shipment Tracking [+ Add](#)

No shipment tracking.

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Paper Weight	30	Each	9.00	270.00	0.00

Part Number 454545 Manufacturer Name Office Depot Manufacturer Part Number 545454 UPS Master Item Number None

Per page 15 | 45 | 90

Total CAD 270.00

Create Invoice Request Change Save Print View

Creating an Invoice from a Purchase Order (PO)

- On the *Choose Invoicing Details* pop up, select or add a new legal entity, remit-to, and ship from address.
- Click *Save*.

Choose Invoicing Details [X]

* Legal Entity: Main Remit To [v] + Add New

Invoice From: 123 Main Street
Atlanta, GA 30075
United States
United States (123456789)

* Remit-To: 123 Main Street, Atlanta, GA 30 [v] + Add New

* Ship From Address: 123 Main Street, Atlanta, GA 30 [v] + Add New

Cancel Save

Creating an Invoice from a Purchase Order (PO)

- In the *General Info* section, enter a unique invoice number in the *Invoice #* field (50-character limit).
- Verify the *Payment Term* field is defaulted to the contractually agreed upon terms.
- Suppliers can add comments in the *Supplier Note* or *Attachments* fields. Supporting documentation can also be added in the *Attachments* field.

Note: If there are Miscellaneous line items, supporting documentation is required.

- Click *Add*.


The screenshot shows the 'Create Invoice' form with the following fields and values:

- General Info**
 - * Invoice #**: IFPO-DM-1 (highlighted with a red box and arrow)
 - * Invoice Date**: 09/12/21
 - * Payment Term**: NET 30 (highlighted with a red box and arrow)
 - Date of Supply**: 09/12/21
 - * Currency**: CAD
 - Delivery Number**: (empty)
 - Status**: Draft
 - Image Scan**: Choose File | No file chosen
 - Supplier Note**: This is an example of how the text field is used (highlighted with a red box and arrow)
 - Attachments**: Add File | URL | Text
- From**
 - * Supplier**: P590_2192285_SCASURRE19395 L_SUPER SAVE ENTERPRISES LTD.
 - * Supplier GST/HST ID**: 999999999TQ9999
 - * Invoice From Address**: Super Save Enterprises Legal Entity, 3650 12th Street Northeast, Calgary, AB T2E 6N1, Canada
 - * Remit-To Address**: Super Save Enterprises Legal Entity, 3650 12th Street Northeast, Calgary, AB T2E 6N1, Canada
 - * Ship From Address**: Super Save Enterprises Legal Entity, 3650 12th Street Northeast, Calgary, AB T2E 6N1, Canada
- To**
 - Customer**: UPS
 - * Bill To Address**: 1930 Derry Rd. E., Mississauga, Ontario L5S 1E2, Canada
 - * Buyer GST/HST ID**: UPS1112223
 - Ship To Address**: UPS-SCS LS, 4071 North Service Rd, Burlington, ON L7L 4X8, Canada, Location Code: ONBULLO2669

Creating an Invoice from a Purchase Order (PO)

- Scroll down to the *To* section.
- Verify the *Bill To Address* and *Ship To Addresses*.

Note: Once approved the Alternate Due Date field will contain the anticipated date of payment.

 To

Customer UPS

*** Bill To Address** 1930 Derry Rd. E.
Mississauga, Ontario L5S 1E2
Canada

*** Buyer GST/HST ID**

Ship To Address UPS-SCS LS
4071 North Service Rd
Burlington, ON L7L 4X6
Canada
Location Code: ONBULLO2669

Description

Please provide an Invoice/Pay Authorization description

Alternate Due Date None

Creating an Invoice from a Purchase Order (PO)

- Scroll down to the [Lines](#) section.
- Verify the description, unit of measure (UOM), and price in the corresponding fields.
- Verify or adjust the quantity ([Qty](#)) as necessary.
- To add line items to the invoice, click [Add Line](#) and complete necessary fields.
- To add line items associated with a particular contract, click [Pick lines from Contract](#) and add lines from the available options.

The screenshot shows the 'Lines' section of a software interface. At the top, there is a table with the following columns: Type, Description, Qty, UOM, and Price. The table contains one row with the following values: Type (Shopping cart icon), Description (Paper Weight), Qty (30), UOM (Each), and Price (9.00). The total price is 270.00. Below the table, there are fields for PO Line (COU59834-1), Contract (dropdown menu), and Supplier Part Number (454545). There is also a Billing section with a long alphanumeric string. Below that is a Taxes section with a table for Tax Type, Tax Rate, Tax Amount, and Tax Reference. The Tax Amount is 0.00. At the bottom of the form, there are two buttons: '+ Add Line' and '+ Pick lines from Contract', and a 'Totals & Taxes' button.

Creating an Invoice from a Purchase Order (PO)

Suppliers in operating in regions requiring line level taxation:

- Use the *Tax Type* dropdown menu to select the appropriate value.

Note: The Tax Rate and Tax Amount fields will auto populate once the Tax Type value is selected.

Type	Description	Qty	UOM	Price	
	Paper Weight	30	Each	9.00	270.00

PO Line	Contract	Supplier Part Number
COU59834-1		454545

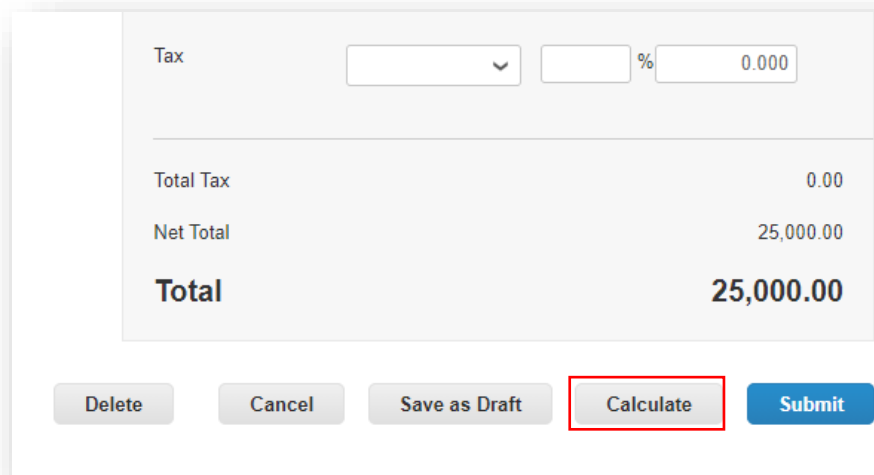
Billing
LO2889-N052-893101-0000-000000-000000-000000

Tax Type	Tax Rate	Tax Amount	Tax Reference
		0.00	

Add Line Pick lines from Contract **Totals & Taxes**

Creating an Invoice from a Purchase Order (PO)

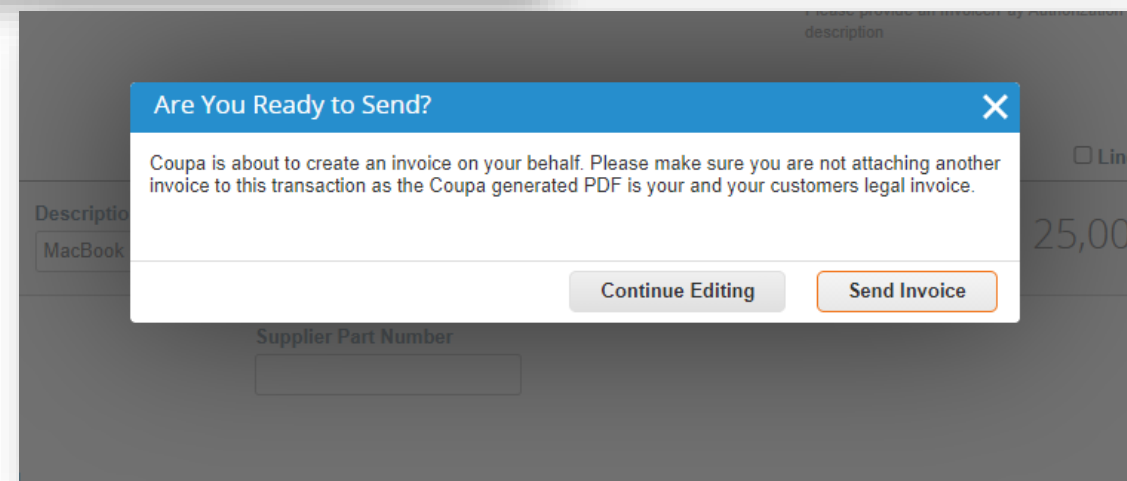
- Scroll down and click the *Calculate* button to validate the total amount.
- Once the total is validated and all required fields are completed, click the *Submit* button.
- Click *Send Invoice* on the *Are You Ready to Send* pop up.



The screenshot shows a form for calculating the total amount of an invoice. At the top, there is a 'Tax' section with a dropdown menu, a percentage sign, and a text input field containing '0.000'. Below this is a summary table:

Total Tax	0.00
Net Total	25,000.00
Total	25,000.00

At the bottom of the form, there are five buttons: 'Delete', 'Cancel', 'Save as Draft', 'Calculate' (highlighted with a red border), and 'Submit'.



The screenshot shows a pop-up dialog box titled 'Are You Ready to Send?' with a close button (X) in the top right corner. The dialog contains the following text:

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

At the bottom of the dialog, there are two buttons: 'Continue Editing' and 'Send Invoice'.

Creating an Invoice from a Purchase Order (PO)

- A *Warning from UPS* pop up will appear.
- Ensure the ship to location code is correct, if necessary, by clicking the *Continue Editing* button and scrolling up to the Ship To Address, in the *To* section to verify the location code
- Note: If uncertain about the location code, contact your UPS contact to verify.
- Otherwise, click the *Submit* button.

Ship To Address UPS-SCS LS
4071 North Service Rd
Burlington, ON L7L 4X6
Canada
Location Code: ONBULLO2669

PO Line
COU59834-1

Contract

Supplier Part Number

Billing
LO2689-N052-893

Taxes

Tax Type Tax Rate Tax Amount Tax Reference

DST 7.0% 48.00

Warning from UPS X

This Invoice has the following warning:

- PLEASE ENSURE YOU SELECT YOUR CORRECT SHIP TO LOCATION CODE

Continue Editing **Submit**

Creating an Invoice from a Purchase Order (PO)

- On the *Invoices* page, the green bar of success should appear and the newly created invoice should have a status of *Processing*.
- Users will be notified of invoice status updates via online, email, and/or SMS (text) messaging, depending on how notifications were set up.
- Got questions? Need help? Email supplyline@ups.com for assistance.

Invoices

P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS invoice #IFPO-DM-2 is processing

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
None	10/12/20	Draft	COU1342	0.00 USD	No		
BITest-DM-1	10/09/20	Pending Approval	None	200.00 USD	No		
NV-DFE	10/09/20	Pending Approval	None	10.00 USD	No		
DAP123	10/09/20	Pending Approval	None	100.00 USD	No		
TESTREQUESTOR	10/09/20	Draft	None	50.00 USD	No		
None	10/08/20	Draft	None	0.00 USD	No		
NV-3452	10/08/20	Pending Approval	None	20.00 USD	No		
NV-3456	10/08/20	Pending Approval	COU262	600.00 USD	No		
IFPO-DM-1	10/08/20	Pending Approval	COU1026	869.00 USD	No		
IFPO-DM-2	10/07/20	Processing	None	25,000.00 USD	No		



THANK YOU