

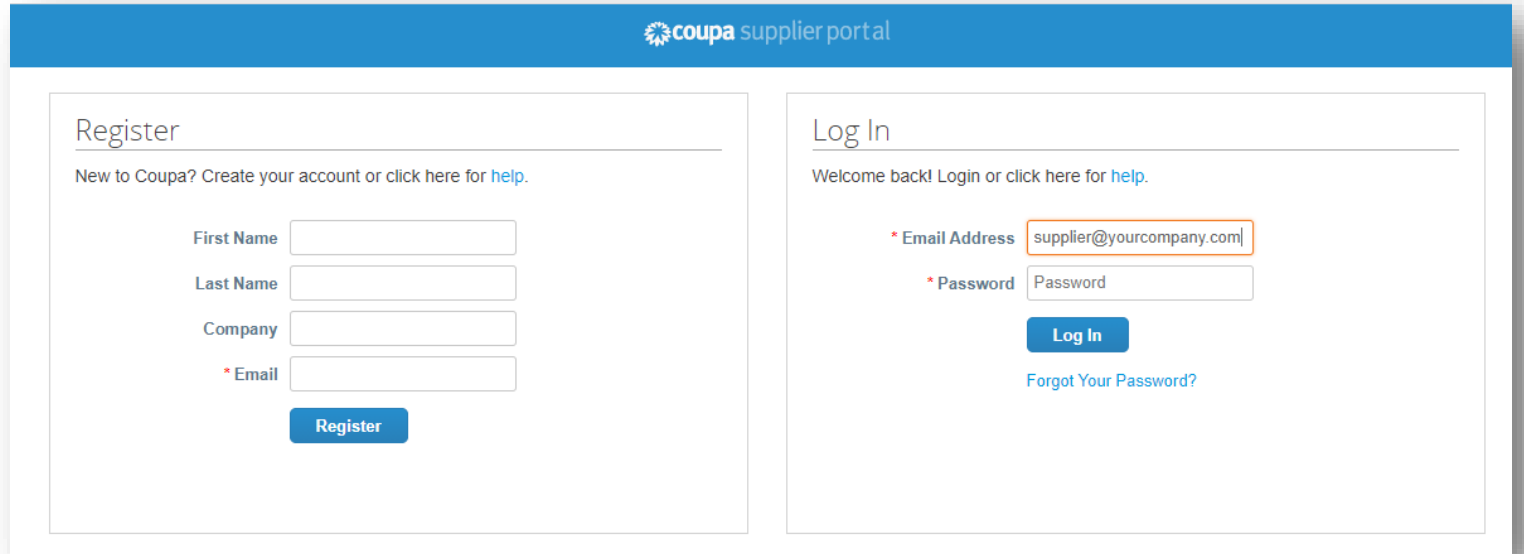


Coupa Supplier Portal: Invoicing – Creating a Purchase Order (PO) Backed Invoice

11/3/2020

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.



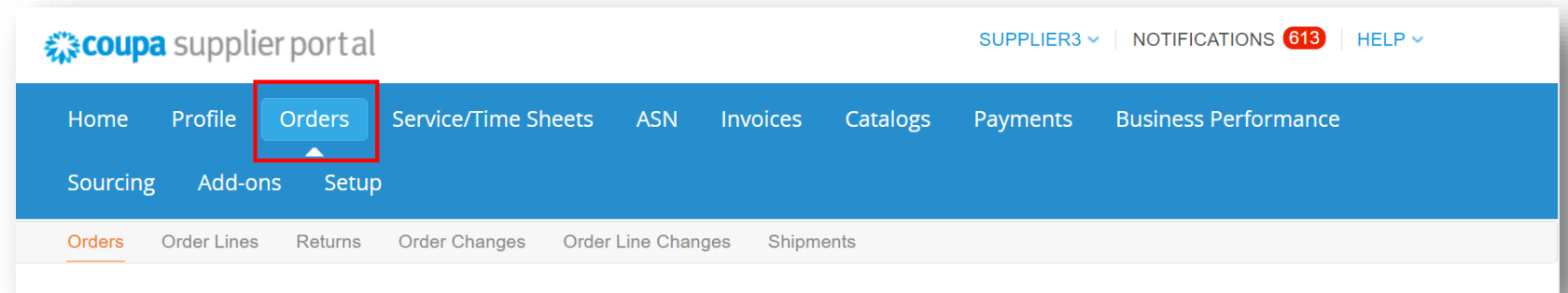
The screenshot displays the Coupa Supplier Portal interface. At the top, a blue header contains the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

The "Register" section includes the heading "Register" and a sub-heading "New to Coupa? Create your account or click here for [help](#).". It features four input fields: "First Name", "Last Name", "Company", and "* Email". A blue "Register" button is positioned below the "Email" field.

The "Log In" section includes the heading "Log In" and a sub-heading "Welcome back! Login or click here for [help](#).". It features two input fields: "* Email Address" (containing the text "supplier@yourcompany.com") and "* Password" (containing the text "Password"). A blue "Log In" button is positioned below the "Password" field. A link for "Forgot Your Password?" is located below the "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.




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)

- Under the Actions column, click on the gold coins  icon.

Purchase Orders

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

View All

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
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		
COU1342	09/16/20	Issued	None	1 Each of 9715030001_COUPA	No	29.62 USD		  
COU1341	09/16/20	Issued	None	1 Each of 9715030001_COUPA	No	29.62 USD		  
COU1340	09/16/20	Issued	None	1 Each of SNOW REMOVAL	No	400.00 USD		  

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*.

The screenshot shows a 'Choose Invoicing Details' dialog box. The background is a table with columns: Description, Qty, UOM, Price. The dialog box contains the following fields:

- * Legal Entity: Main Remit To (dropdown) + Add New
- Invoice From: 123 Main Street, Atlanta, GA 30075, United States, United States (123456789)
- * Remit-To: 123 Main Street, Atlanta, GA 30075 (dropdown) + Add New
- * Ship From Address: 123 Main Street, Atlanta, GA 30075 (dropdown) + Add New

Buttons: 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 displays a web interface for creating an invoice. It is divided into two main sections: 'General Info' and 'From'. The 'General Info' section includes fields for 'Invoice #' (containing 'IFPO-DM-1'), 'Invoice Date' (set to 'Set automatically at time of submission'), 'Payment Term' (containing 'EOAP + NET 45'), 'Currency' (set to 'USD'), 'Delivery Number', 'Status' (set to 'Draft'), 'Contract' (set to 'UAT Contract - CROWE'), 'Image Scan' (with a 'Choose File' button and 'No file chosen' text), and 'Supplier Note'. The 'Attachments' section has a red box around the 'Add File | URL | Text' link, and a modal window is open showing a text input field with the placeholder text 'This is an example of how the text field can be used.' and an 'Add' button. The 'From' section includes 'Supplier' (P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS), 'Invoice From Address' (Main Remit To, 123 Main Street, Atlanta, GA 30075, United States), 'Remit-To Address' (Main Remit To, 123 Main Street, Atlanta, GA 30075, United States), and 'Ship From Address' (Main Remit To, 123 Main Street, Atlanta, GA 30075, United States). The 'To' section includes 'Customer' (UPS QA), 'Bill To Address' (No address selected), 'Buyer Tax ID' (None), and 'Ship To Address' (No address selected).

Creating an Invoice from a Purchase Order (PO)

- Scroll down to the *To* section and click the magnifying glass next to the *Bill To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose*.

 To


Customer UPS QA

* **Bill To Address** 10 Upper Pond 
Parsippany, New Jersey 07054
United States


VAT ID 123456789


Buyer Tax ID


Buyer Tax ID None

* **Ship To Address** 0083 DISTRICT ALLOCATION 
8315 NE AIRTRANS WAY
PORTLAND, OR 97218
United States
Location Code: ORAIRAO2651

Choose an Address ✕

View All Search 


Legal Entity Name	Line 1	Line 2	City	State	Postal Code	Country	Actions
None	10 Upper Pond	None	Parsippany	New Jersey	07054	United States	 Choose

 Add Line Totals & Taxes

Creating an Invoice from a Purchase Order (PO)

- Click the magnifying glass next to *Ship To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose*.
- Complete the *Requester Email* and *Requester Name* fields.

Note: The "Requester" is the UPS employee who requested the goods or service.

* **Ship To Address** 0083 DISTRICT ALLOCATION 
8315 NE AIRTRANS WAY
PORTLAND, OR 97218
United States
Location Code: ORAIRAO2651

* **Requester Email**

* **Requester Name**

Description

Please provide a description

Choose an Address Buyer Tax ID: None

Create View All Advanced Search

Name	Line 1	Line 2	City	State	Postal Code	Country	Location Code	Attention	Actions
-AZCAS880850	533 W. COTTONWOOD LA	None	CASA GRANDE	AZ	85222	United States	AZCASXN0694	None	<input checked="" type="checkbox"/> Choose
-VARMN722324	UPS FREIGHT - MRKTG INTL - MEXICO	1000 SEMMES AVE	RICHMOND	VA	23224	United States	VARMNXN0434	None	<input checked="" type="checkbox"/> Choose
0076 DISTRICT ALLOCATION-AKERI976076	0076 DISTRICT ALLOCATION	6200 LOCKHEED AVE	ANCHORAGE	AK	99502	United States	AKERIAO2648	None	<input checked="" type="checkbox"/> Choose
0076 DISTRICT PRICING-WAGAT872076	UPS -0076 DISTRICT PRICING	13035 GATEWAY DR #149	SEATTLE	WA	98168	United States	WAGATZ01142	None	<input checked="" type="checkbox"/> Choose
0083 DISTRICT ALLOCATION-ORAIR976083	0083 DISTRICT ALLOCATION	8315 NE AIRTRANS WAY	PORTLAND	OR	97218	United States	ORAIRAO2651	None	<input checked="" type="checkbox"/> Choose
0083 DISTRICT PRICING-ORPOR872083	0083 DISTRICT PRICING	6707 N. BASIN AVE.	PORTLAND	OR	97217	United States	ORPORZ05097	None	<input checked="" type="checkbox"/> Choose
0086 DISTRICT PRICING-CAOGO872086	0086 DISTRICT PRICING	1975 ADAMS AVE	SAN LEANDRO	CA	94577	United States	CAOGOZ00510	None	<input checked="" type="checkbox"/> Choose
0212 DISTRICT ALLOCATION-ILBDL976012	0212 DISTRICT ALLOCATION	2055 ARMY TRAIL	ADDISON	IL	60101	United States	ILBDLZ00916	None	<input checked="" type="checkbox"/> Choose
0212 DISTRICT PRICING-ILBDL872012	0212 DISTRICT PRICING	2055 ARMYTRAIL RD	ADDISON	IL	60101	United States	ILBDLZ05077	None	<input checked="" type="checkbox"/> Choose
0212 PRELOAD ASSIST-ILBDL212PAS	0212 PRELOAD ASSIST	2055 ARMY TRAIL	ADDISON	IL	60101	United States	ILBDLZ01859	None	<input checked="" type="checkbox"/> Choose

Prev 1 2 3 ... Next

Lines Net Total 0.00

Creating an Invoice from a Purchase Order (PO)

- Scroll down to the *Lines* section. Select the *Type* from the dropdown menu.
- Enter a description, quantity, unit of measure (UOM), and price in the corresponding fields.
- To add line items to the invoice, click *Add Line* and complete necessary fields.

The screenshot displays the 'Lines' section of a software interface. At the top right, there is a checkbox for 'Line Level Taxation'. Below this is a table with the following columns: Type, Description, Qty, UOM, Price, and a total value. The table contains one row with the following data: Type is 'Qty' (dropdown), Description is 'MacBook Pro', Qty is '10', UOM is 'Each' (dropdown), Price is '2,500.00', and the total is '25,000.00' with a red 'X' icon. Below the table, there are two fields: 'PO Line' with the value 'None' and 'Supplier Part Number' with an empty input box. At the bottom left, there is a blue 'Add Tag' button with a tag icon. At the bottom center, there is a green 'Add Line' button with a plus icon. At the bottom right, there is a 'Totals & Taxes' label.

Type	Description	Qty	UOM	Price	
Qty	MacBook Pro	10	Each	2,500.00	25,000.00

PO Line: None

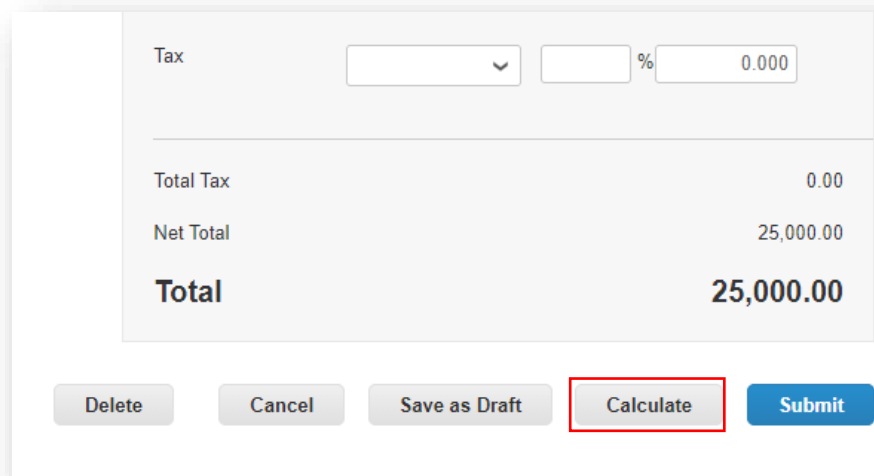
Supplier Part Number: [Empty]

Buttons: Add Tag, Add Line

Totals & Taxes

Creating an Invoice from a Purchase Order (PO)

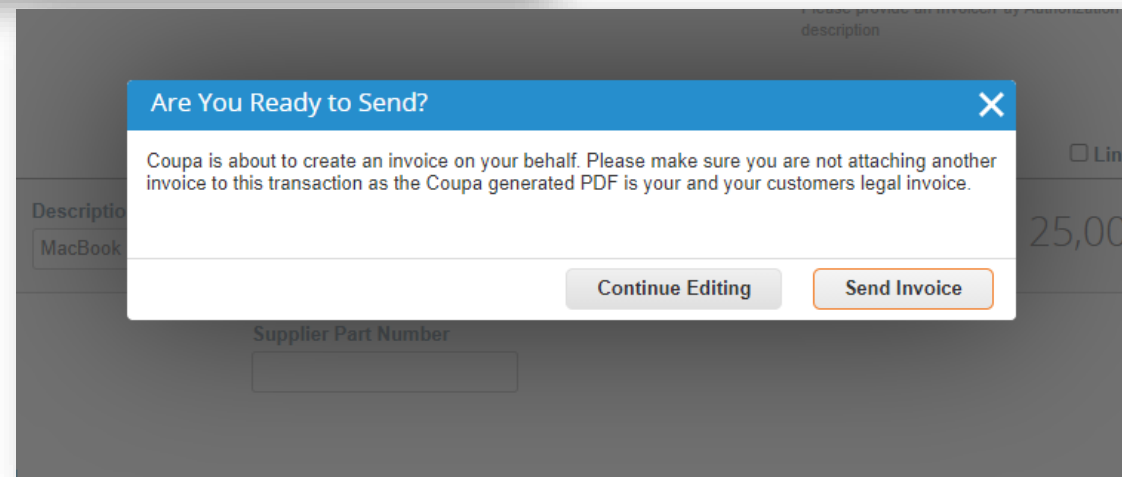
- Scroll down and click the *Calculate* button to validate the total amount.
- Once the total is validated and all required fields are completed, click the *Submit* button.
- Click *Send Invoice* on the *Are You Ready to Send* popup.



The screenshot shows a tax calculation interface. 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 modal 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)

- On the *Invoices* page, 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-DFF	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