

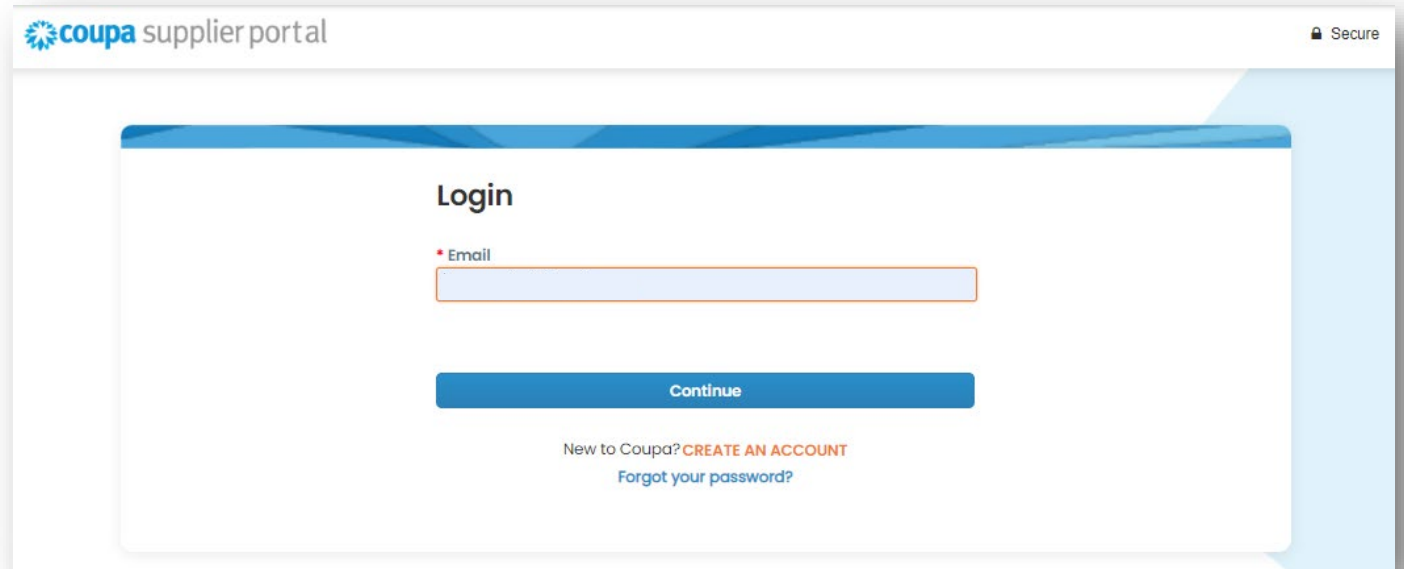


Coupa Supplier Portal: Invoicing – Creating an Invoice Against a Contract

10/28/2024

Creating an Invoice Against a Contract

- Log into the Coupa Supplier Portal (CSP) at: <https://supplier.coupa.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 is titled "Login" and features a text input field labeled "Email" with a red asterisk indicating a required field. Below the input field is a blue "Continue" button. At the bottom of the login area, there are two links: "New to Coupa? CREATE AN ACCOUNT" and "Forgot your password?".

Creating an Invoice Against a Contract

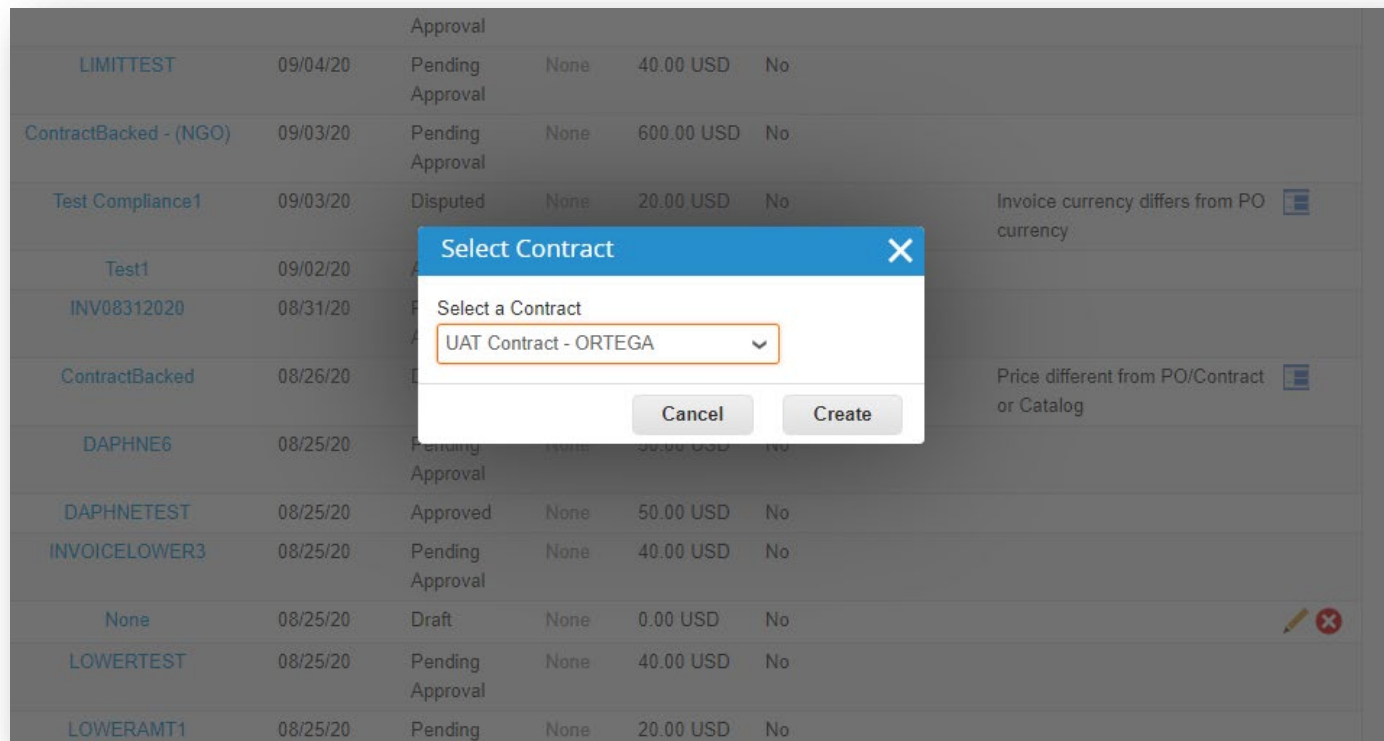
- Click on the *Invoices* tab at the top of the page.
- From the *Select Customer* dropdown menu, select the appropriate customer (UPS).
- Click *Create Invoice from Contract*.

Note: A grayed out *Create Invoice from Contract* button may be an indication that the wrong UPS customer was selected from the *Select Customer* dropdown menu.

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'DORIAN', 'NOTIFICATIONS 80', and 'HELP' are on the right. A navigation bar contains 'Invoices' (highlighted with a red box), 'Orders', 'Profile', 'Payments', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Catalogs', and 'Business Performance'. Below this, a sub-navigation bar has 'Invoices' (underlined), 'Invoices Lines', 'Payment Receipts', and 'Advanced'. On the right side, a 'Select customer' dropdown menu is open, showing 'UPS - P035_3413464_NJPRINC2' selected (highlighted with a red box). The main content area is titled 'Invoices' and 'Create Invoices' (with an info icon). Below this, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract' (highlighted with a red box), 'Create Blank Invoice', and 'Create Credit Note'. At the bottom, there is a table header with columns: 'Invoice #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', 'Dispute Reason', and 'Actions'. Above the table header, there are controls for 'Export to', 'View' (set to 'All'), and a search bar.

Creating an Invoice Against a Contract

- On the *Select Contract* pop up, make a selection from the dropdown menu.
- Click *Create*.



Creating an Invoice Against a Contract – **INDIA SUPPLIERS ONLY**

- Suppliers in India will encounter the Indian GST Council e-Invoicing popup
- If applicable, suppliers can select the *Upload response JSON file* option and upload a decrypted response JSON file from their computer
- If not, leave the *Use Coupa India presentation template* option selected
- Click Continue

The screenshot shows a dialog box titled "Upload authorized file or use template". The text inside reads: "The Indian GST Council has rolled out the GST e-Invoice System for taxpayers to generate e-invoices and register them on the system. If your organization falls under this mandate, please follow the prescribed invoice registration process and upload the decrypted response JSON as received from the GST e-Invoice System below. Otherwise, create an invoice using the Coupa India presentation template." Below this text are two radio button options: "Use Coupa India presentation template" (which is selected) and "Upload response JSON file". Under the "Upload response JSON file" option, there is a "Choose File" button and the text "No file chosen". At the bottom right of the dialog are "Cancel" and "Continue" buttons. The background shows a blurred interface with a "Beneficiary Name: BRIGHTWAYS LOGISTICS" label.

Creating an Invoice Against a Contract

- Complete each required field on the *Choose Invoicing Details* screen by clicking *Add New* and entering the information or selecting previously created information from the dropdown menus.
- Click *Save*.

The screenshot shows a software interface for creating an invoice. A modal dialog box titled "Choose Invoicing Details" is open, allowing the user to specify the legal entity and addresses for the invoice. The dialog box contains the following fields:

- * Legal Entity:** A dropdown menu with "Main Remit To" selected and an "Add New" button.
- Invoice From:** A text area containing "123 Main Street", "Atlanta, GA 30075", "United States", and "United States (123456789)".
- * Remit-To:** A dropdown menu with "123 Main Street, Atlanta, GA 30" selected and an "Add New" button.
- * Ship From Address:** A dropdown menu with "123 Main Street, Atlanta, GA 30" selected and an "Add New" button.

At the bottom of the dialog box, there are "Cancel" and "Save" buttons.

Creating an Invoice Against a Contract

- 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.

- If any attachments are included, click *Add*.

Select Customer: UPS QA - P035_3313610_TXDALLAPOBOX731

Create Invoice Create

General Info

* Invoice # IAC-DM-23 ✓

Invoice Date Set automatically at time of submission

Payment Term EOAP + NET 45

* Currency USD

Delivery Number

Status Draft

Contract UAT Contract - ORTEGA

Image Scan No file chosen

Supplier Note This is an example of how the text field can be used.

Attachments

From

* Supplier P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS

* Invoice From Address Main 2
123 Main Street
Chicaho, 85054
United States

* Remit-To Address Main 2
123 Main Street
Chicaho, 85054
United States

* Ship From Address Main 2
123 Main Street
Chicaho, 85054
United States

To

Customer UPS QA

* Bill To Address No address selected

Buyer Tax ID None

* Ship To Address No address selected

Creating an Invoice Against a Contract

- In the *General Info* section, enter a unique invoice number in the *Invoice #* field (50 character limit).
- Verify that 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.
India and UAE suppliers must attach a pdf copy of the invoice.

- Click *Add*.
- Select the correct number from the *Supplier GSTIN* dropdown, if applicable.

The screenshot shows a web form for creating an invoice. The form is divided into two main sections: 'General Info' and 'From'. The 'General Info' section includes fields for 'Invoice #', 'Invoice Date' (10/02/24), 'Payment Term' (NET 30), 'Date of Supply' (10/02/24), 'Currency' (INR), 'Delivery Number', 'Status' (Draft), 'Image Scan' (Choose File), 'Supplier Note', 'Attachments' (Add File | URL | Text), 'Invoice Reference Number (IRN)', 'Signed QR Code', and 'Place Of Supply'. The 'From' section includes 'Supplier' (P590_3354878_UIN03LDHRFC3355_BRIGHTWAYS LOGISTICS), 'Supplier GSTIN' (99AAAAA9999AAZ9), 'Invoice From Address' (BRIGHTWAYS LOGISTICS, MUMBAI CENTER PLOT NO 6A, SHYAM, MUMBAI 400060, Maharashtra, India), 'Remit-To Address' (BRIGHTWAYS LOGISTICS, MUMBAI CENTER PLOT NO 6A, SHYAM, MUMBAI 400060, Maharashtra, India), 'Bank Name' (SBI), 'Beneficiary Name' (BRIGHTWAYS LOGISTICS), 'Bank Account Number' (*****0342), 'IFSC' (*****2345), and 'Ship From Address' (BRIGHTWAYS LOGISTICS, MUMBAI CENTER PLOT NO 6A, SHYAM, MUMBAI 400060, Maharashtra). A red callout box on the right side of the form states: 'These fields are only visible to suppliers in India.' The callout box points to the 'Supplier GSTIN' dropdown, the 'Remit-To Address' field, and the 'Place Of Supply' field.

Creating an Invoice Against a Contract

- 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** UPS OASIS SUPPLY CORPORATION
P.O. Box 982267
El Paso, Texas 79998
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: ORAIRA02651

Choose an Address ✕

View All Search

Legal Entity Name	Line 1	Line 2	City	State	Postal Code	Country	Actions
None	UPS OASIS SUPPLY CORPORATION	P.O. Box 982267	El Paso	Texas	79998	United States	<input checked="" type="checkbox"/> Choose

Creating an Invoice Against a Contract – **INDIA SUPPLIERS ONLY**

- Choose the applicable value (C+S, GST, Bill, or RCM) from the *Invoice Type Code* dropdown.

Bill To City Mumbai
Bill To Maharashtra
State/Region/Province
Bill To Zip/Postal Code 400060
Bill To Country IN

Description
Please provide an Invoice/Pay Authorization description

Alternate Due Date None

Invoice Type Code

Creating an Invoice Against a Contract – INDIA SUPPLIERS SEE NEXT SLIDE

- Scroll down to the *Lines* section.
- Leave *Qty* as the item *Type* in the dropdown menu.
- Begin typing the good or service OR type the number “9” in the *Description* field and SELECT the appropriate item from the dropdown that appears.

Note: If Miscellaneous (Misc.) master items are selected in the Description field, supporting documentation must be attached in the General Info Attachments section.

The screenshot shows the 'Lines' section of a software interface. The 'Description' field contains the number '9'. A dropdown menu is open, showing a list of items. The first item, '9746010000_MI_MISC. MUST PROVIDE DOCUMENTATION', is highlighted with a red box. A blue callout arrow points from this red box to a blue text box at the bottom right.

When using the copy/paste function users must still SELECT the item from the dropdown for this field.

To receive a complete list of master items aligned with a contract, email supplyline@ups.com. Use the subject line: *Coupa Rate Sheet Request*.

Creating an Invoice Against a Contract – INDIA SUPPLIERS ONLY

- Scroll down to the *Lines* section.
- Leave *Qty* as the item *Type* in the dropdown menu.
- Verify the description, unit of measure (*UOM*), and price in the corresponding fields.
- Begin typing the good or service OR type the number “9” in the *Description* field and SELECT the appropriate item from the dropdown that appears.
- Verify or, if necessary, adjust (lower) the quantity (*Qty*).
- Enter the correct number in the *HSN/SAC* field.
- 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** is selected. If Miscellaneous (Misc.) master items are selected in the Description field, supporting documentation must be attached in the General Info Attachments section.

Type	Description	Qty	UOM	Price
Qty	9	1.000	Acres	0.00

763956001_MI_Test Truck- Standard- Half day
763956001_MI_Test Truck- Standard- Fullday
763956001_MI_Labor- Certified back flow tester
763900_MI_Covert Testing Services

Service/Time Sheet Line: None
Supplier Part Number: [Empty]

Tax Type	Tax Rate	Tax Amount	Tax Reference
[Dropdown]	[Dropdown]	0.00	[Empty]

When using the copy/paste function users must still SELECT the item from the dropdown for this field.

To receive a complete list of master items aligned with a contract, email supplyline@ups.com. Use the subject line: **Coupa Rate Sheet Request**.

Creating an Invoice Against a Contract – Multiple Miscellaneous Items

Option #1

Original Invoice

Bill To:
55 Glenlake Pkwy
Sandy Springs, GA 30328
404-123-4567

DM Road & Repair

DESCRIPTION	Qty	Price	AMOUNT
Heavy Truck Winching (Hourly)	1	\$ 100.00	\$ 100.00
Road Service	1	\$ 40.00	\$ 40.00
Drive Shaft Removal	2	\$ 25.00	\$ 50.00
Total			\$ 190.00

Invoices containing multiple miscellaneous items such as parts, materials, equipment, and services FOR A SINGLE UPS LOCATION can be submitted with separate line-item entries for each item.

Note: If Miscellaneous (MI/MISC) master items are selected in the *Description* field, supporting documentation such as the original invoice must be attached in the *Attachments* section of the invoice

Coupa Invoice

The screenshot shows the 'Lines' section of a Coupa invoice. It contains four line items, each with a quantity of 1. The items are:

- Line 1: Type City, Description 76395001_MI_Test Tr, Qty 1, UOM Each, Price 100.00. Tax Type IGST, Tax Rate 28.0%, Tax Amount 28.00.
- Line 2: Type City, Description 76395001_MI_Test Tr, Qty 1, UOM Each, Price 40.00. Tax Type IGST, Tax Rate 28.0%, Tax Amount 11.20.
- Line 3: Type City, Description 76395001_MI_Test Tr, Qty 1, UOM Each, Price 25.00. Tax Type IGST, Tax Rate 28.0%, Tax Amount 7.00.
- Line 4: Type City, Description 763900_MI_Covert Tes, Qty 1, UOM Day, Price 25.00. Tax Type IGST, Tax Rate 28.0%, Tax Amount 7.00.

Each line item has fields for HSN/SAC, PO Line, Service/Time Sheet Line, and Supplier Part Number. The 'Qty' field for each item is highlighted with a red box.

In the *Lines* section, each item listed on the attached invoice is input on individual lines with a quantity of 1.

Creating an Invoice Against a Contract – Multiple Miscellaneous Items

Option #2

Original Invoice

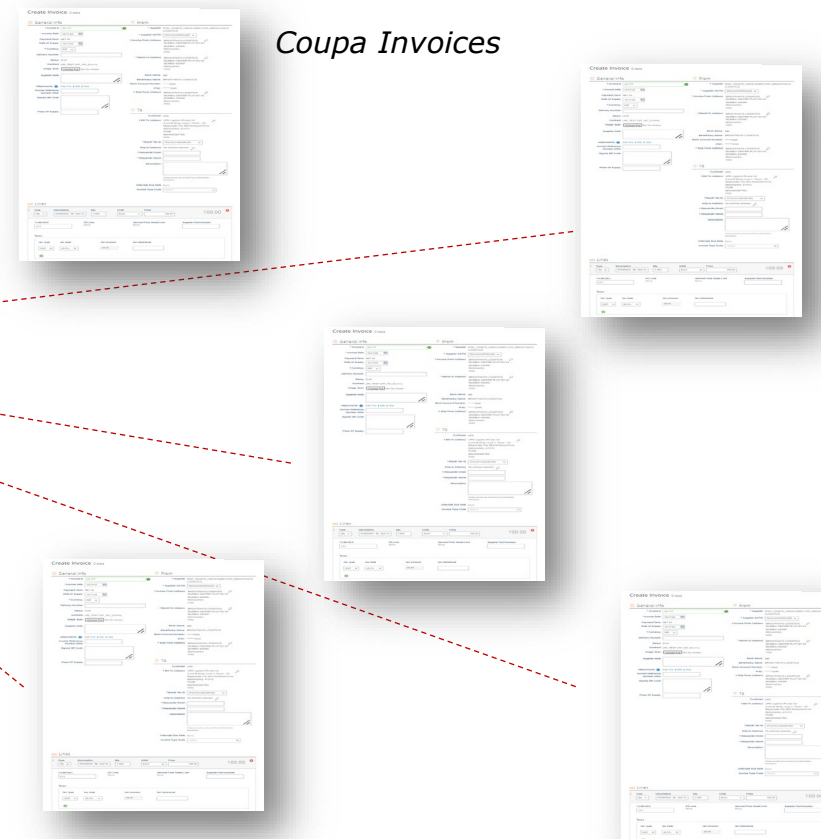
Bill To:
55 Glenlake Pkwy
Sandy Springs, GA 30328
404-123-4567

DESCRIPTION	Qty	Price	AMOUNT
Drug Screen - Urinalysis	5	\$ 14.00	\$ 70.00
Total			\$ 70.00

Invoices containing multiple miscellaneous items such as parts, materials, equipment, and services **FOR MULTIPLE UPS LOCATIONS** can be submitted on individual invoices with one line per invoice.

Note: If Miscellaneous (MI/MISC) master items are selected in the *Description* field, supporting documentation such as the original invoice must be attached in the *Attachments* section of the invoice

Coupa Invoices



Each item listed on the attached invoice can be broken out into a separate invoice with one line, addressed to the appropriate location and UPS requester.

Creating an Invoice Against a Contract

- For items which the quantity is greater than one, adjust the number in the *Qty* field as necessary

Note: Depending on the unit of measure (UOM), the decimal point can be used in the *Qty* field, to provide an accurate accounting. For example, one and a half “Work Hours” can be entered as 1.5 in the *Qty* field.

- The unit of measure (UOM) field will auto populate in accordance with the item selected in the Description field. DO NOT change the UOM.
- To add line items to the invoice, click *Add Line* and complete necessary fields.

☰ Lines

Type	Description	Qty	UOM	Price	
Qty ▾	763956001_MI_Test Tr	1.5	Work Hour ▾	375.00	0.00

* HSN/SAC	PO Line	Service/Time Sheet Line	Supplier Part Number
1234	None	None	

Taxes

Tax Type	Tax Rate	Tax Amount	Tax Reference
IGST ▾	28.0% ▾	105.00	

Creating an Invoice Against a Contract

- 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.

Tax %

Total Tax	0.00
Net Total	200.00
Total	200.00

Are You Ready to Send?

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.

Creating an Invoice Against a Contract

- 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.

Select Customer: UPS QA - P035_3313610_TXDALLAPOBOX731

Invoices

P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS invoice #IAC-DM-23 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
IAC-DM-23	11/17/20	Processing	None	10.10 USD	No		
IAC-DM-22	11/17/20	Disputed	None	10.10 USD	No	This Invoice is missing a valid Requester	
None	11/17/20	Draft	None	0.00 USD	No		
None	11/17/20	Draft	None	0.00 USD	No		
None	11/17/20	Draft	None	0.00 USD	No		



THANK YOU