

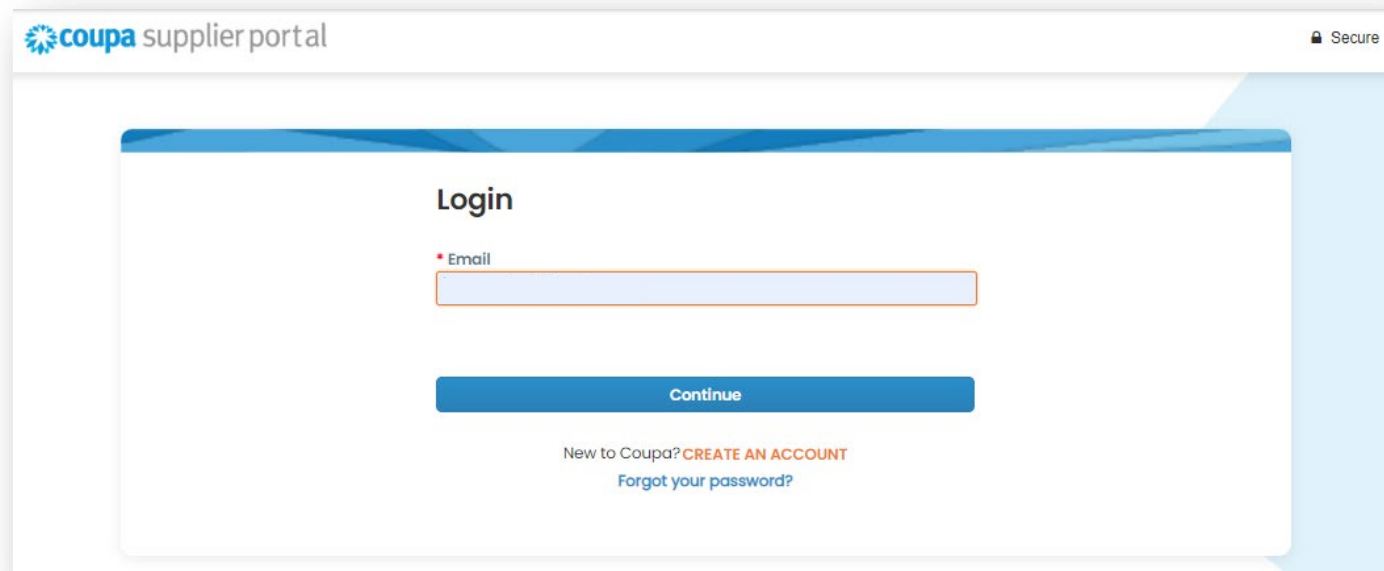


Coupa Supplier Portal: Invoicing – Creating a Purchase Order (PO) Backed Invoice

10/28/2024

Creating an Invoice Against a Contract

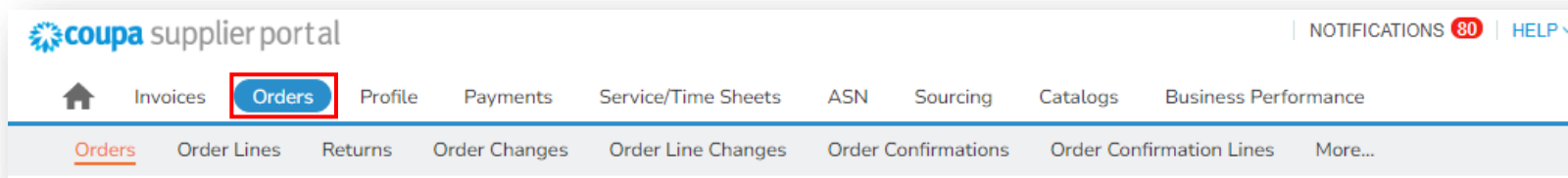
- Log into the Coupa Supplier Portal (CSP) at: <https://supplier.coupahost.com/> using the previously established email address and password.
- For best results, Google Chrome is the recommended web browser.



The screenshot displays the Coupa Supplier Portal login interface. At the top left, the logo reads "coupa supplier portal". In the top right corner, there is a "Secure" indicator with a lock icon. The main content area features a "Login" heading. Below this heading is a text input field labeled "Email" with a red asterisk indicating a required field. Underneath 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 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
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)

- 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

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		      

Creating an Invoice from a Purchase Order (PO) - **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.

Upload authorized file or use template

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.

Use Coupa India presentation template

Upload response JSON file

Choose File No file chosen

Cancel Continue

Beneficiary Name: BRIGHTWAYS LOGISTICS

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

* Legal Entity: Main Remit To + Add New

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

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

* Ship From Address: 123 Main Street, Atlanta, GA 30 + 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 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 the 'General Info' and 'From' sections of an invoice creation form. 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 box on the right contains the text 'These fields are only visible to suppliers in India.' and red arrows point from this box to the 'Supplier GSTIN', 'Supplier Note', and 'Place Of Supply' fields.

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) - **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 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, if necessary, adjust (lower) the quantity (*Qty*).

The screenshot shows a software interface for managing purchase order lines. The title is "Lines" and there is a checkbox for "Line Level Taxation". The main table has the following data:

Type	Description	Qty	UOM	Price	
	paper box	18	Each	5.00	90.00

Below the table, there are several fields:

- PO Line:** COUQA4927643-1
- Service/Time Sheet Line:** None
- Contract:**
- Credit Line:** None
- Supplier Part Number:**
- Billing:** XH0380-N001-632904-0000-0000-000000-000000

Creating an Invoice from a Purchase Order (PO) - **INDIA SUPPLIERS ONLY**

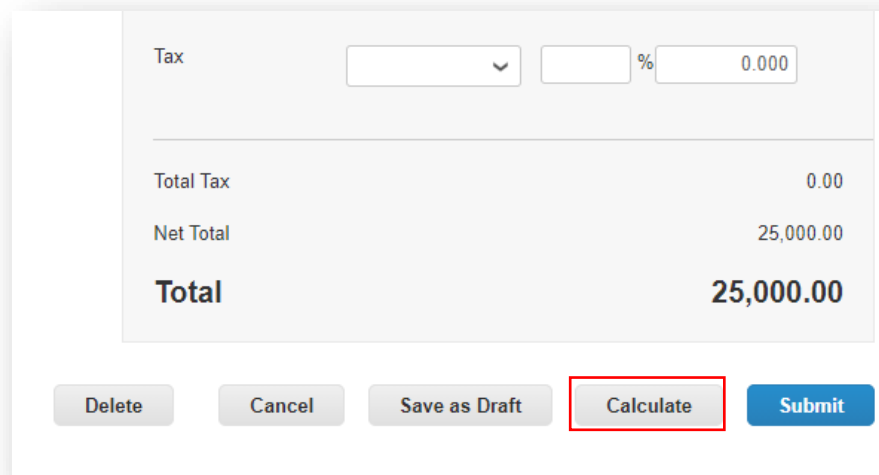
- Scroll down to the *Lines* section.
- Verify the description, unit of measure (*UOM*), and price in the corresponding fields.
- Verify or, if necessary, adjust (lower) the quantity (*Qty*).
- Enter the correct number in the *HSN/SAC* field.
- Use the *Tax Type* dropdown menu to select the appropriate value.

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

The screenshot shows a 'Lines' section in a software interface. The main table has columns for Type, Description, Qty, UOM, Price, and a total price of 450.00. The description is 'laptop', Qty is '1', and UOM is 'Each'. Below the table, there are several fields: HSN/SAC (highlighted with a red box), PO Line (COUQA4927828-1), Service/Time Sheet Line (None), Contract (dropdown), Credit Line (None), Supplier Part Number (empty), and Billing (XU1746-I008-692104-0000-0000-000000-000000). At the bottom, there is a 'Taxes' section with a table for Tax Type, Tax Rate, Tax Amount, and Tax Reference. The Tax Type dropdown is highlighted with a red box, and the Tax Amount field shows 0.00.

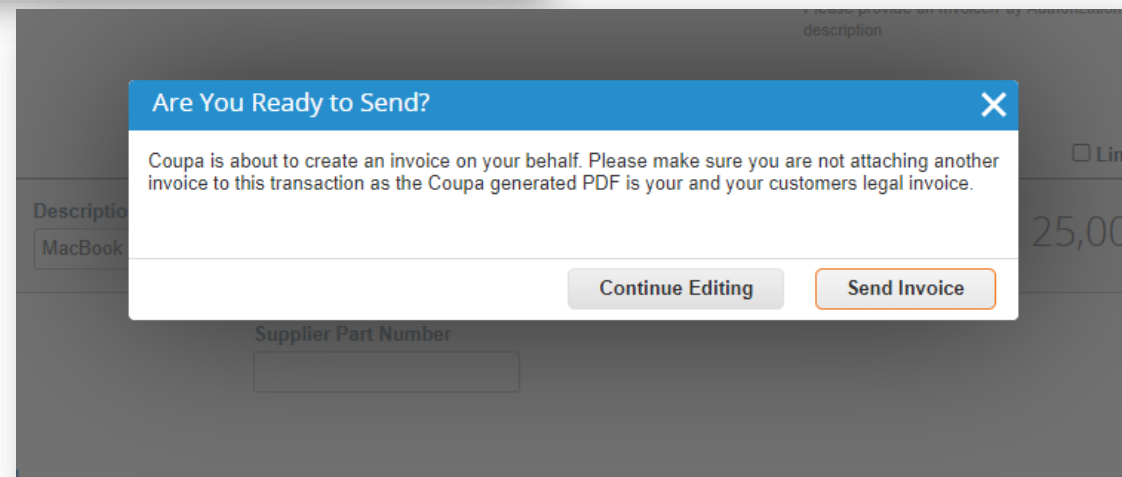
Creating an Invoice from a Purchase Order (PO)

- 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.



Tax %

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



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 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