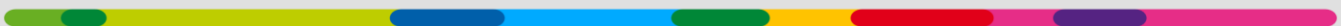




Purchase to Pay

# **Submit Invoices Using Coupa (Suppliers)**

*As of MARCH 2019*



## Overview

Invoices can be created directly from the Purchase Order (PO) in the Coupa Supplier Portal (CSP) and Supplier Actionable Notifications (SAN). Suppliers can also view invoice and payment status by customer. There are two ways of creating an invoice:

- Registering on CSP
- Without registering via SAN



**Note:** The link for both the ways of providing information will be sent to the supplier via an Email.

## Objective

This job aid describes the process to:

- Create an Invoice via CSP
- View Invoice and Payment Status in CSP
- Create an Invoice via SAN
- View Invoice and Payment Status via SAN

## Steps to Create an Invoice via CSP:

### Join Coupa Supplier Portal

Register and Login to Coupa by creating an account.

- 1 Enter the first name in the **First Name** field.
- 2 Enter the last name in the **Last Name** field.
- 3 Enter the company name in the **Company** field.
- 4 Enter and confirm the password in the **Password** and **Password Confirmation** field.
- 5 Select the **I accept the Privacy Policy and the Terms of Use** checkbox.
- 6 Click the **Submit** button.

The screenshot shows the 'Join the Coupa Supplier Portal' registration page. The form fields are: First Name (CDW), Last Name (Supplier), Company (CDW Supplier), Email (engie.supplier+90009@gmail.com), Password (masked with dots), Password Confirmation (masked with dots), and a checkbox for 'I accept the Privacy Policy and the Terms of Use'. A blue 'Submit' button is at the bottom. Numbered callouts 1-6 highlight the fields and the submit button in the order of the steps listed in the job aid.

## Welcome to Coupa Supplier Portal window

The Welcome to Coupa Supplier Portal window is displayed.

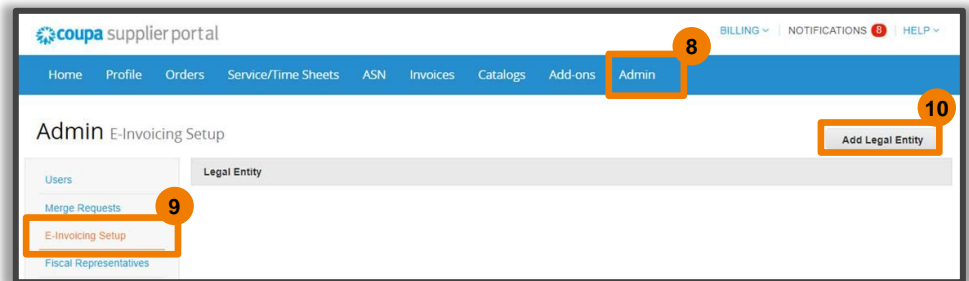
- 7 Click the **Skip** or **Close** button.



## Coupa Supplier Portal

The user will need to step up the Remit-to Address (step 8 to 19) in CSP.

- 8 Click the **Admin** tab to set up the **Legal Entity**.
- 9 Click **E-Invoicing Setup**.
- 10 Click the **Add Legal Entity** button.



**Note:** Only changes applied from the **'Profile'** section will be acknowledged. (see external supplier data job aid). Any changes applied in the Admin section will not be reflected for invoice payments by ENGIE.

11 Populate the following mandatory fields:

- **Legal Entity Name**
- **Country**

12 Click the **Continue** button.

13 Select the required checkbox for **Which customers do you want to see this?**

- **All**
- **ENGIE North America**

14 Enter the address from where you invoice and populate the following mandatory fields:

- **Address Line 1**
- **City**
- **Postal Code**

15 Check the following fields if applicable:

- **Use this address for Remit-To**
- **Use this for Ship From address**

- 16 Populate the required fields under the **Banking Information** section and select the required checkbox.

Banking information ⓘ

Bank Account Country: United States

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Routing Numt

Account Number: ⓘ

Account Number Confirm:

IBAN: ⓘ

SWIFT/BIC Code: ⓘ

Bank Account Type: Business

Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

**RECOMMENDED**

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations) ⓘ

- 17 Scroll down further and enter the VAT ID in the **VAT ID** field.
- 18 Click the **Done** button.

What is your Tax ID? ⓘ

Country: United States

Tax ID:

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code ⓘ

Preferred Language: English (US)

Cancel Done 18

## Setup Complete

- 19 Click the **Return to Admin** button.

Now, you can create the purchase order.

Setup Complete

**Congratulations!**

This legal entity can now be used on new invoices.

**To get paid** - Most customers require that you send them this payment info in addition to providing it on the invoice. [?](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Go to Orders   Go to Invoices   **Return to Admin**

## Coupa supplier portal

- 20 Click the **Orders** tab.

Home   Profile   **Orders**   Service/Time Sheets

## Purchase Orders Screen

The **Purchase Orders** screen includes the list of orders created.

Purchase Orders

Instructions From Customer  
CANADA ONLY: For invoicing in Canada, please ensure you invoice against the tax line included in the purchase order. Do not add tax at the end of the invoice. If a tax line item is not included on the PO, please contact the requester.

View All

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments
3127	11/29/18	Issued	None	10 each of optical cable 3m	No

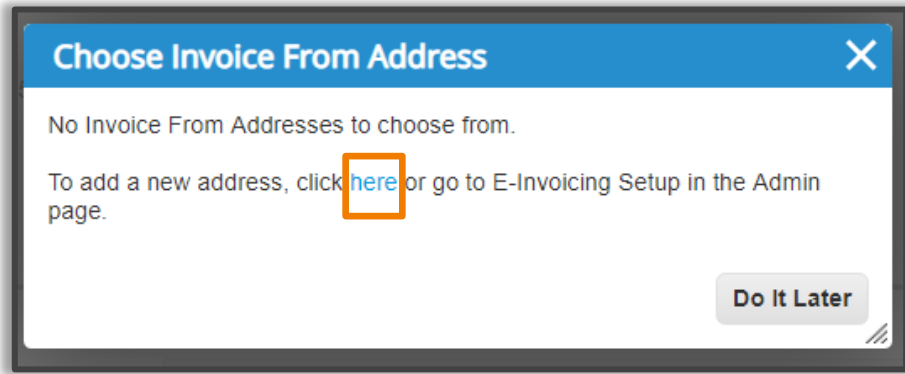
Total   **Actions**

300.00 USD

21 Click the **gold coin** icon from the **Actions** column of the PO for which you wish to create an invoice from.



**Note:** If the supplier doesn't have any **Remit-To Address**, after clicking the gold icons, the **Choose Invoice From Address** pop-up window is displayed. Click the **here** link and follow the steps 11 to 19.



## Create Invoice Screen

The **Create Invoice** screen displays detailed information on the invoice.

22 Populate the mandatory fields.

- **Invoice # - must be less than 16 characters**
- **Invoice Date**
- **Currency**
- **Supplier Note**
- **Invoice From Address**
- **Remit To Address**
- **Ship From Address**
- **Attachments**
- **Ship to Address**

23

Scroll down and populate the remaining mandatory fields:

- **Description**
- **Price**
- **Qty**
- **UOM**
- **Add Line**



**Note:** Ensure you adjust the price if you're not billing the entire PO line amount.

23

24

Click the **Calculate** button to see invoice totals prior to submitting.

25

Click the **Submit** button.

To save the draft to continue to work on the form later, click the **Save as draft** button instead.

25

24

25

Are you Ready to Send? Window

The **Are You Ready to Send?** pop-up window is displayed with the summary of the invoice.

26

Click the **Send Invoice** button.

26



### *Invoice Created*

A confirmation message is displayed stating that **Invoice has been sent for approval** is displayed.

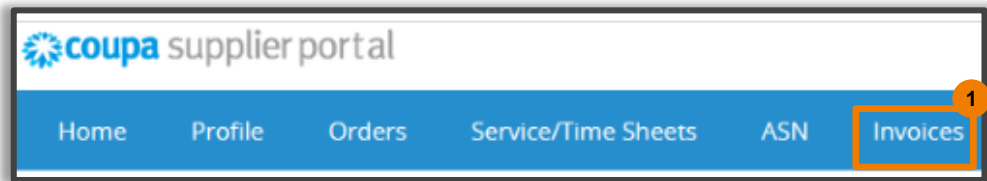
## Invoices

9Lenses, Inc. invoice #INV\_112233 is pending approval

# Steps to View Invoice Status via CSP

## Coupa supplier portal Screen

- 1 Click the **Invoices** tab.

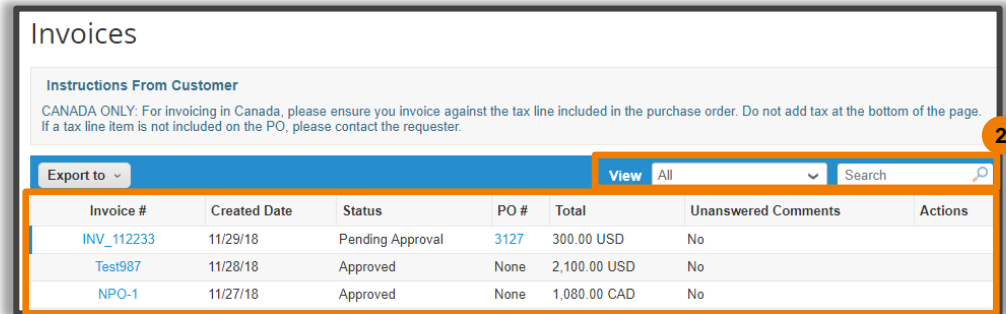


## Invoices Screen

The Invoices screen displays the list of invoices created in CSP.

- 2 Click the required invoice form the list to view the details.

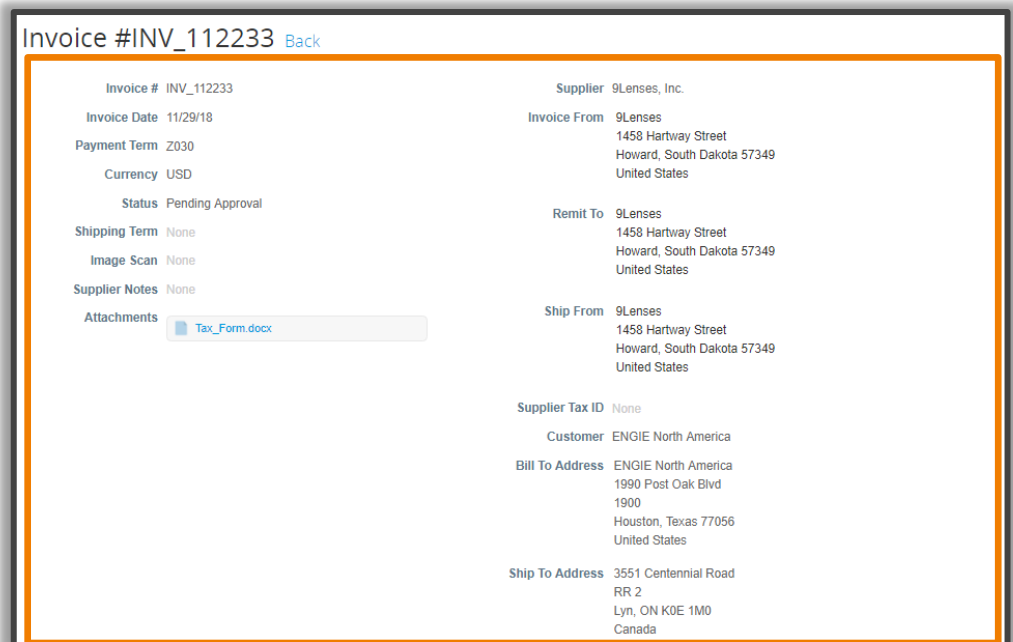
You can also use the search bar to filter the list with a search term or click the **View** drop-down list to perform advanced filtering.



## Invoice displayed.

The Invoice is displayed including Payment Information.

1. **Paid:** Payment Status
2. **Payment Date:** Date the Invoice is Paid.
3. **Payment Notes:** Contains Instruction or Customer Notes.
4. **Amount Paid:** Total Amount Supplier will be receiving.
5. **Payment No.**



1 Paid Yes

2 Payment Date 12/03/18

3 Payment Notes Wire Transfer

4 Amount Paid 300.00

5 Payment No. PN0001

Payment Date 12/03/18

Line	Description	Supplier Part Number	Commodity	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line
1	optical cable 3m		Cables - Data And Optical	EA			10	30.00	300.00	3127-1

Down Payment Amount None

**Taxes**

Tax Summary

Tax	0.00
<b>Total Tax</b>	<b>0.00</b>

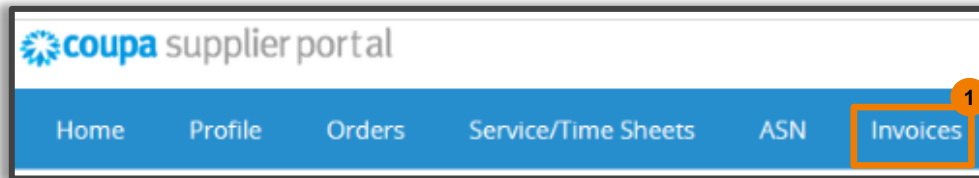
**Totals**

Taxable Amount	300.00
Subtotal	300.00
Tax	0.00
<b>Total</b>	<b>300.00</b>

## Steps to View Invoice Payment Information via CSP

Coupa supplier portal Screen

- 1 Click the **Invoices** tab.

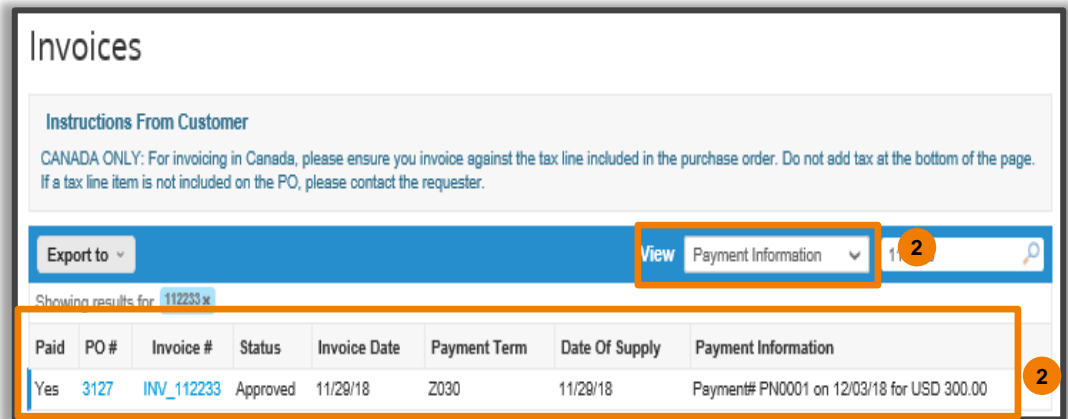


## Invoices Screen

The Invoices screen displays the list of invoices created in CSP.

- 2 Click the **View** drop-down list and Select **Payment Information**.

The Invoice Payment Information is displayed.



The screenshot shows the 'Invoices' screen with the following details:

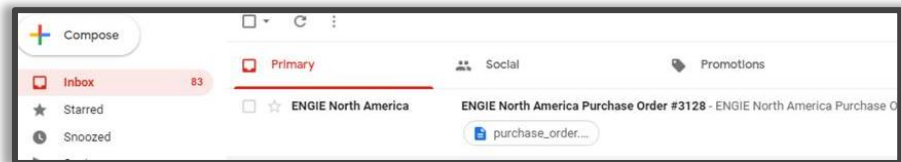
- Instructions From Customer:** CANADA ONLY: For invoicing in Canada, please ensure you invoice against the tax line included in the purchase order. Do not add tax at the bottom of the page. If a tax line item is not included on the PO, please contact the requester.
- Export to:** A dropdown menu.
- View:** A dropdown menu currently set to 'Payment Information', highlighted with a red box and a '2' callout.
- Showing results for:** 112233 x
- Table:** A table with columns: Paid, PO#, Invoice#, Status, Invoice Date, Payment Term, Date Of Supply, and Payment Information. The first row contains: Yes, 3127, INV\_112233, Approved, 11/29/18, Z030, 11/29/18, and Payment# PN0001 on 12/03/18 for USD 300.00. The table is highlighted with a red box and a '2' callout.

## Steps to Create an Invoice via SAN:

### Email Inbox

Login to your email Inbox.

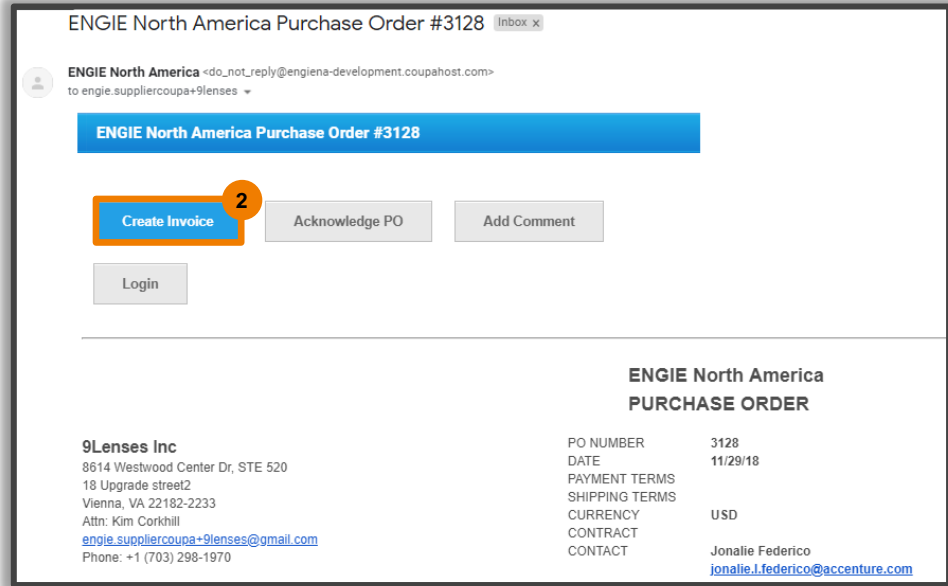
- 1 Open the Purchase Order E-mail received.



The screenshot shows an email inbox with the following details:

- Compose:** A button to create a new email.
- Inbox:** A folder with 83 emails.
- Primary:** A folder containing the selected email.
- ENGIE North America:** A folder containing the selected email.
- ENGIE North America Purchase Order #3128 - ENGIE North America Purchase O:** The subject of the selected email.
- purchase\_order...:** A link to the purchase order.

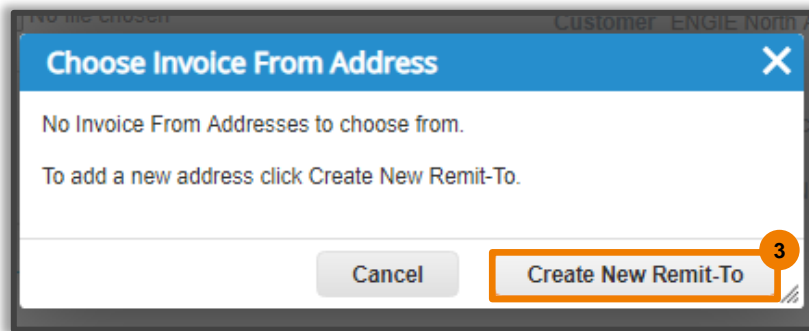
2 Click the **Create Invoice** button.



### Choose Invoice From Address Window

The user will need to step up the Remit-to Address (step 3 to 5) in CSP.

3 Click the **Create New Remit-To** button.



## Enter a new address Screen

- 4 Populate the **Remit-To Address, Tax and Banking Information** fields.
- 5 Click the **Create and Use** button.

The **Remit-To Address** is now displayed in the Invoice screen.

The screenshot shows a web form titled "Enter a new address" with a close button (X) in the top right corner. The form is divided into several sections: "Company Information", "Address", "Tax Registration", and "Banking Information".

- Company Information:** Includes a "Supplier" dropdown menu with "ACCENT FOOD SERVICES, LLC" selected, and a "\* Country" dropdown menu with "United States" selected.
- Address:** Includes input fields for "Remit To Name", "\* Line 1", "Line 2", "\* City", "State", and "\* Postal Code". There is also a "Preferred Language" dropdown menu with "English" selected.
- Tax Registration:** Includes a "Tax Country" dropdown menu with "United States" selected, a "Tax ID" input field, and a checkbox labeled "Not For Cross-Border Invoices" which is currently unchecked.
- Banking Information:** This section is partially visible at the bottom of the form.

At the bottom of the form, there are two buttons: "Cancel" and "Create and Use".

Numbered callouts are present: a "3" in a circle is located in the top right corner of the form area, and a "5" in a circle is located in the bottom right corner, near the "Create and Use" button.

## Create Invoice Screen

The **Create Invoice** screen displays detailed information on the invoice.



**Note:** The steps for filling up the invoice will be the same as that of **To Create an Invoice via CSP**, steps 22 to 26.

### Create Invoice Create

**General Info**

\* Invoice #

\* Invoice Date  Calendar icon

Payment Term

\* Currency  Dropdown arrow

Status

Image Scan  No file chosen

Supplier Note

\* Attachments  |  |

**From**

\* Supplier 9Lenses, Inc.

Supplier Tax ID None

\* Invoice From Address 9Lenses Search icon  
1458 Hartway Street  
Howard, South Dakota 57349  
United States

\* Remit-To Address 9Lenses Search icon  
1458 Hartway Street  
Howard, South Dakota 57349  
United States

\* Ship From Address 9Lenses Search icon  
1458 Hartway Street  
Howard, South Dakota 57349  
United States

**To**

Customer ENGIE North America

Buyer Tax ID None

\* Ship To Address 3551 Centennial Road  
RR 2  
Lyn, ON K0E 1M0  
Canada

## Invoice Created

A confirmation message is displayed stating that **Invoice has been sent for approval** is displayed.

### Invoices Sign Out

9Lenses, Inc. invoice #INV\_5678 is pending approval

**Instructions From Customer**

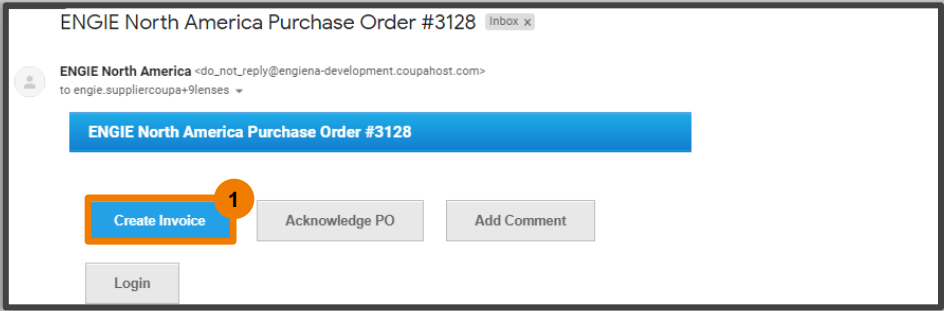
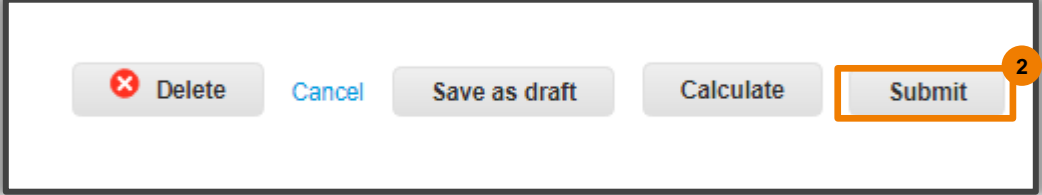
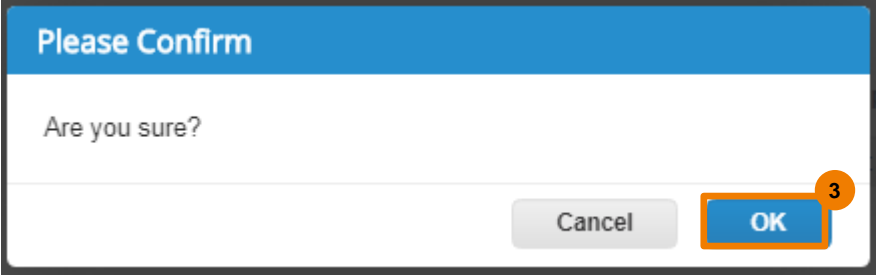

CANADA ONLY: For invoicing in Canada, please ensure you invoice against the tax line included in the purchase order. Do not add tax at the bottom of the page. If a tax line item is not included on the PO, please contact the requester.

**View** All Dropdown arrow  Search icon

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
INV_5678	11/29/18	Pending Approval	3128	450.00 USD	No	

Per page 15 | 45 | 90

# Steps to View Invoice Status via SAN

<p><b>Email Inbox Screen</b></p> <p>1 Click the <b>Create Invoice</b> button.</p>	 <p>The screenshot shows an email interface for 'ENGIE North America Purchase Order #3128'. The email header includes the sender 'ENGIE North America' and the subject 'ENGIE North America Purchase Order #3128'. Below the header, there are three buttons: 'Create Invoice' (highlighted with a red box and a '1' in a red circle), 'Acknowledge PO', and 'Add Comment'. A 'Login' button is also visible at the bottom left.</p>														
<p>2 Click the <b>Submit</b> button.</p>	 <p>The screenshot shows a row of action buttons: 'Delete' (with a red 'x' icon), 'Cancel', 'Save as draft', 'Calculate', and 'Submit' (highlighted with a red box and a '2' in a red circle).</p>														
<p>3 Click the <b>OK</b> button.</p>	 <p>The screenshot shows a 'Please Confirm' dialog box with the text 'Are you sure?'. At the bottom right, there are two buttons: 'Cancel' and 'OK' (highlighted with a red box and a '3' in a red circle).</p>														
<p><b>Invoices Screen</b></p> <p>4 Click the invoice link.</p>	 <p>The screenshot shows the 'Invoices' screen. It includes a section for 'Instructions From Customer' with a note about CANADA ONLY. Below this is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row of the table is highlighted with a red box and a '4' in a red circle.</p> <table border="1"><thead><tr><th>Invoice #</th><th>Created Date</th><th>Status</th><th>PO #</th><th>Total</th><th>Unanswered Comments</th><th>Actions</th></tr></thead><tbody><tr><td>INV_112233</td><td>11</td><td>Approved</td><td>3127</td><td>300.00 USD</td><td>No</td><td></td></tr></tbody></table>	Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions	INV_112233	11	Approved	3127	300.00 USD	No	
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions									
INV_112233	11	Approved	3127	300.00 USD	No										



*Invoice displayed.*

*The Invoice is displayed including Payment Information.*

1. **Paid:** Payment Status
2. **Payment Date:** Date the Invoice is Paid.
3. **Payment Notes:** Contains Instruction or Customer Notes.
4. **Amount Paid:** Total Amount Supplier will be receiving.
5. **Payment No.**

## Invoice #INV\_112233

Invoice # INV_112233	Supplier @Lenses, Inc.
Invoice Date 11/29/18	Invoice From @Lenses
Payment Term Z030	1458 Hartway Street
Currency USD	Howard, South Dakota 57349
Status Approved	United States
Shipping Term None	Remit To @Lenses
Image Scan None	1458 Hartway Street
Supplier Notes None	Howard, South Dakota 57349
Attachments <a href="#">Tax_Form.docx</a>	United States
	Ship From @Lenses
	1458 Hartway Street
	Howard, South Dakota 57349
	United States
	Supplier Tax ID None
	Customer ENGIE North America
	Bill To Address ENGIE North America
	1990 Post Oak Blvd
	1900
	Houston, Texas 77058
	United States
	Ship To Address 3551 Centennial Road
	RR 2
	Lyn, ON K0E 1M0
	Canada

Paid Yes **1**  
**2**  Payment Date 12/03/18  
 Payment Notes Wire Transfer **3**  
**4**  Amount Paid 300.00  Payment No. PN0001 **5**  Payment Date 12/03/18

Line	Description	Supplier Part Number	Commodity	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line
1	optical cable 3m		Cables - Data And Optical	EA			10	30.00	300.00	3127-1

Down Payment Amount None

<b>Taxes</b>	
Tax Summary	
Tax	0.00
<b>Total Tax</b>	<b>0.00</b>
<b>Totals</b>	
Taxable Amount	300.00
Subtotal	300.00
Tax	0.00
<b>Total</b>	<b>300.00</b>

## Steps to View Invoice Payment Information via SAN

### Email Inbox Screen

- 1 Click the **Create Invoice** button.

ENGIE North America Purchase Order #3128 Inbox x

ENGIE North America <do\_not\_reply@engiena-development.coupacloud.com>  
to engie.suppliercoupa+9lenses

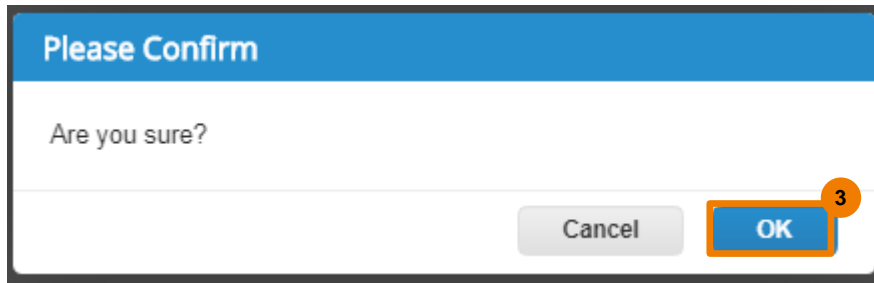
**ENGIE North America Purchase Order #3128**

**1**

- 2 Click the **Submit** button.

**2**

3 Click the **OK** button.



### Invoices Screen

4 Click the **View** drop-down list and Select **Payment Information**.

The Invoice Payment Information is displayed.

Sign Out

## Invoices

Instructions From Customer

CANADA ONLY: For invoicing in Canada, please ensure you invoice against the tax line included in the purchase order. Do not add tax at the bottom of the page. If a tax line item is not included on the PO, please contact the requester.

View Payment Information Search

Paid	PO #	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
Yes	3127	INV_112233	Approved	11/29/18	Z030	11/29/18	Payment# PN0001 on 12/03/18 for USD 300.00

Per page 15 | 45 | 90