



Purchase to Pay

Submit Invoice in Coupa Supplier Portal

As of MAY 2019



Overview

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



Note: The link 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

Steps to Create an Invoice via CSP:

Login to Coupa Supplier Portal

- 1 Enter the **Email Address**.
- 2 Enter the **Password**.
- 3 Click **the Login** button.



Note: To submit invoices via the Coupa Supplier Portal (CSP) you must be registered. To request an invitation to register, please send an email to engiena-centralprocurement@engie.com.

Log In

Welcome back! Login or click here for [help](#).

* Email Address 1

* Password 2

3

[Forgot Your Password?](#)

Welcome to Coupa Supplier Portal

The Welcome to Coupa Supplier Portal window is displayed.

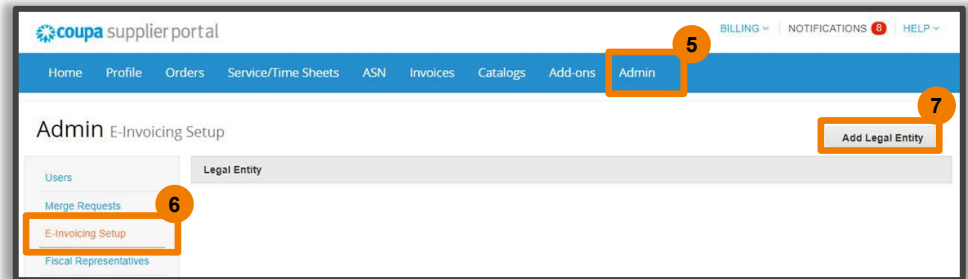
- 4 Click the **Skip** or **Close** button.



Coupa Supplier Portal

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

- 5 Click the **Admin** tab to set up the **Legal Entity**.
- 6 Click **E-Invoicing Setup**.
- 7 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.

8 Populate the following mandatory fields:

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

9 Click the **Continue** button.

10 Select the required checkbox in the **Which customers do you want to see this?** section

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

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

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

12 Check the following fields if applicable:

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

- 13 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) ⓘ

- 14 Scroll down further and enter the VAT ID in the **VAT ID** field.
- 15 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: ⓘ

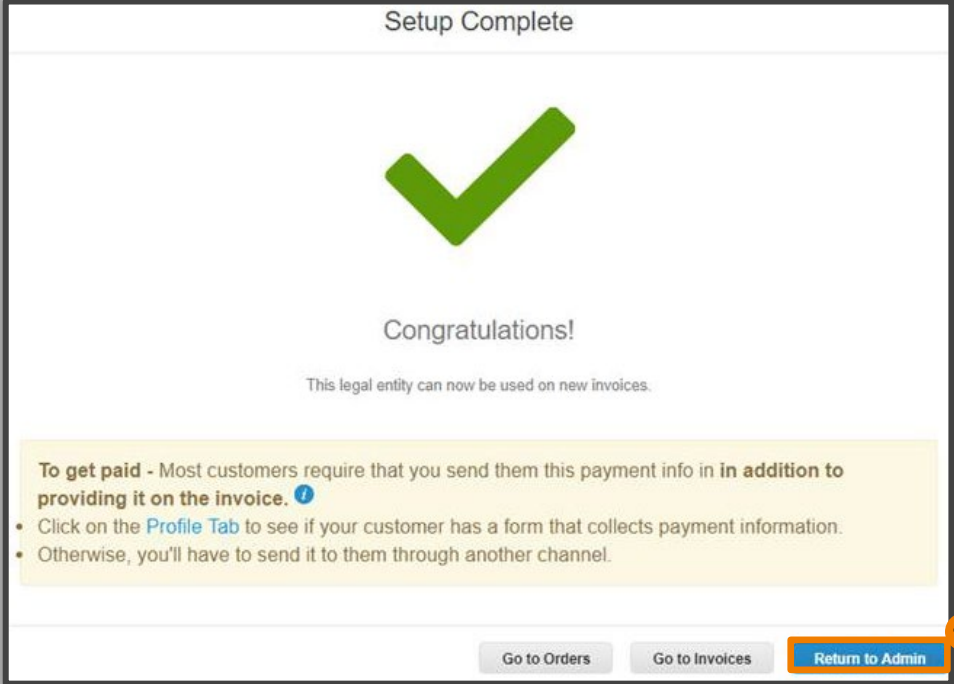
Preferred Language: English (US) ▾

Cancel Done ⓘ

Setup Complete

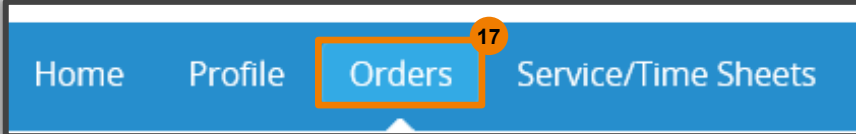
- 16 Click the **Return to Admin** button.

Now, you can create the purchase order.



Coupa supplier portal

- 17 Click the **Orders** tab.



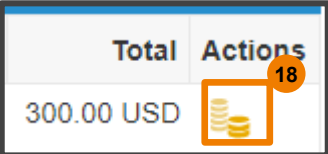
Purchase Orders

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

- 18 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.



Choose Invoice From Address

No Invoice From Addresses to choose from.

To add a new address, click [here](#) or go to E-Invoicing Setup in the Admin page.

Do It Later

Create Invoice

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

19 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**

Create Invoice Create

General Info

* Invoice # INV_112233

* Invoice Date 11/29/18

Payment Term Z030

* Currency USD

Status Draft

Image Scan Choose File No file chosen

Supplier Note

* Attachments Add File | URL | Text

Tax_Form.docx

From

* Supplier 9Lenses, Inc.

Supplier Tax ID None

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

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

* Ship From Address 9Lenses
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

20 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.

Lines

Type	Description	Qty	UOM	Price	Line Level Taxat
	optical cable 3m	10	each	30.00	300.00

PO Line 3127-1 Contract Supplier Part Number Commodity Cables - Data And Optical

Down Payment Amount None

Billing CostCenter-US18-US18000029-6025112403

Add Tag

Add Line

Totals & Taxes

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

22 Click the **Submit** button.

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

Totals & Taxes	
Subtotal	300.00
Shipping	<input type="text"/>
Tax Description <input type="text"/>	<input type="text" value="0.000"/> <input type="text" value="0.00"/>
Total Tax	0.00
Total	300.00

Buttons:

Are you Ready to Send?

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

23 Click the **Send Invoice** button.

Are You Ready to Send? X

You're about to send an invoice to **ENGIE North America** for a total amount of 300.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Buttons:

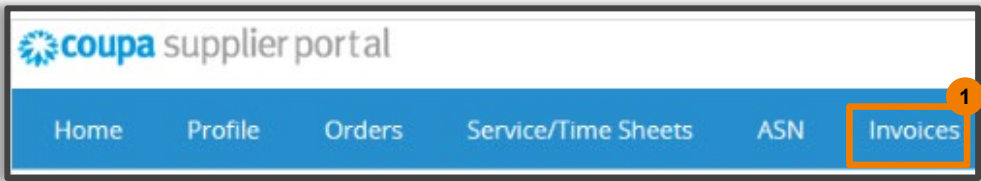
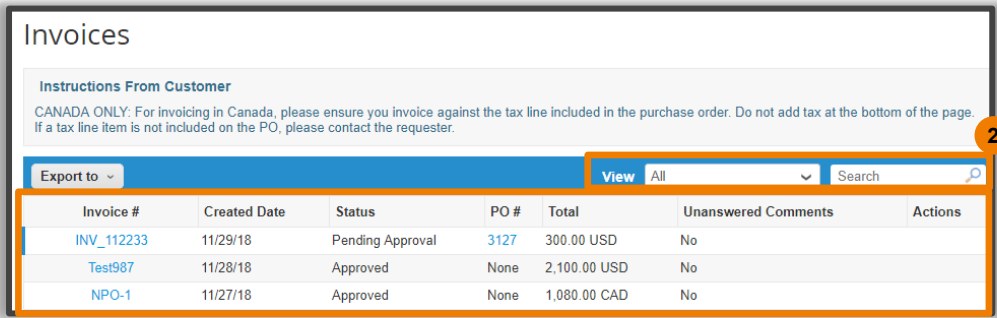
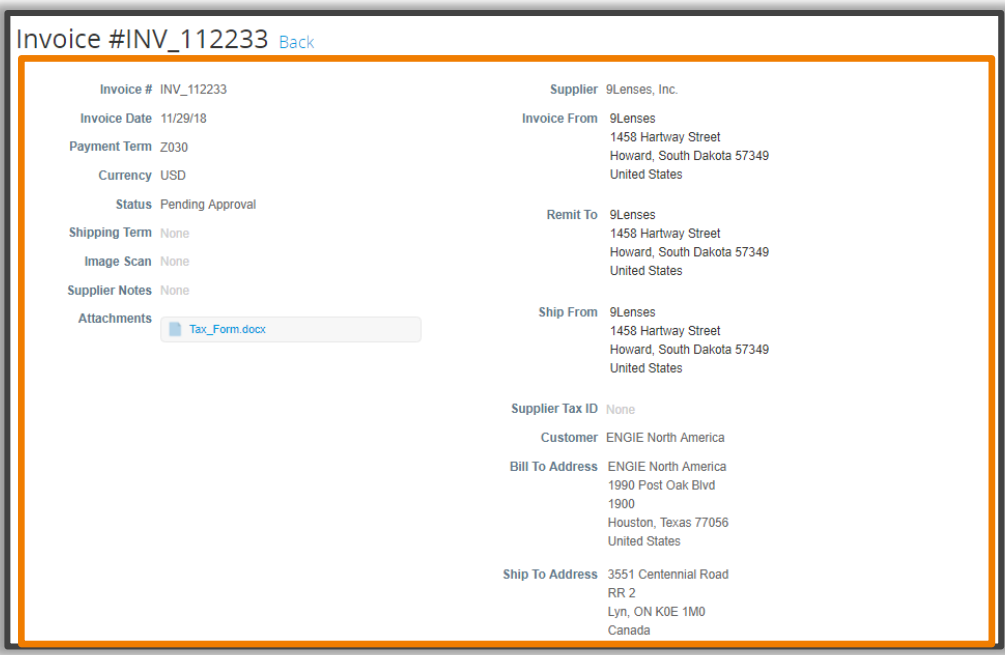
Invoices

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

Invoices

9Lenses, Inc. invoice #INV_112233 is pending approval

Steps to View Invoice Status via CSP

<p>Coupa supplier portal</p> <p>1 Click the Invoices tab.</p>																													
<p>Invoices</p> <p>The Invoices screen displays the list of invoices created in CSP.</p> <p>2 Click the required invoice from the list to view the details.</p> <p>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.</p>	 <p>Invoices</p> <p>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.</p> <p>Export to - View All Search</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>11/29/18</td> <td>Pending Approval</td> <td>3127</td> <td>300.00 USD</td> <td>No</td> <td></td> </tr> <tr> <td>Test987</td> <td>11/28/18</td> <td>Approved</td> <td>None</td> <td>2,100.00 USD</td> <td>No</td> <td></td> </tr> <tr> <td>NPO-1</td> <td>11/27/18</td> <td>Approved</td> <td>None</td> <td>1,080.00 CAD</td> <td>No</td> <td></td> </tr> </tbody> </table>	Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions	INV_112233	11/29/18	Pending Approval	3127	300.00 USD	No		Test987	11/28/18	Approved	None	2,100.00 USD	No		NPO-1	11/27/18	Approved	None	1,080.00 CAD	No	
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<p>Invoice #.</p> <p>The Invoice is displayed with the Payment Information.</p> <ol style="list-style-type: none"> Paid: Payment Status Payment Date: Date the Invoice is Paid. Payment Notes: Contains Instruction or Customer Notes. Amount Paid: Total Amount Supplier will be receiving. Payment No. 	 <p>Invoice #INV_112233 Back</p> <table border="0"> <tr> <td>Invoice # INV_112233</td> <td>Supplier 9Lenses, Inc.</td> </tr> <tr> <td>Invoice Date 11/29/18</td> <td>Invoice From 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States</td> </tr> <tr> <td>Payment Term Z030</td> <td>Remit To 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States</td> </tr> <tr> <td>Currency USD</td> <td>Ship From 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States</td> </tr> <tr> <td>Status Pending Approval</td> <td>Supplier Tax ID None</td> </tr> <tr> <td>Shipping Term None</td> <td>Customer ENGIE North America</td> </tr> <tr> <td>Image Scan None</td> <td>Bill To Address ENGIE North America 1990 Post Oak Blvd 1900 Houston, Texas 77056 United States</td> </tr> <tr> <td>Supplier Notes None</td> <td>Ship To Address 3551 Centennial Road RR 2 Lyn, ON K0E 1M0 Canada</td> </tr> <tr> <td>Attachments Tax_Form.docx</td> <td></td> </tr> </table>	Invoice # INV_112233	Supplier 9Lenses, Inc.	Invoice Date 11/29/18	Invoice From 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States	Payment Term Z030	Remit To 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States	Currency USD	Ship From 9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States	Status Pending Approval	Supplier Tax ID None	Shipping Term None	Customer ENGIE North America	Image Scan None	Bill To Address ENGIE North America 1990 Post Oak Blvd 1900 Houston, Texas 77056 United States	Supplier Notes None	Ship To Address 3551 Centennial Road RR 2 Lyn, ON K0E 1M0 Canada	Attachments Tax_Form.docx											
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Paid Yes **1**
 Payment Date 12/03/18 **2**
 Payment Notes Wire Transfer **3**
 Amount Paid 300.00 **4** Payment No. FN0001 **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

Taxes

Tax Summary

Tax	0.00
Total Tax	0.00

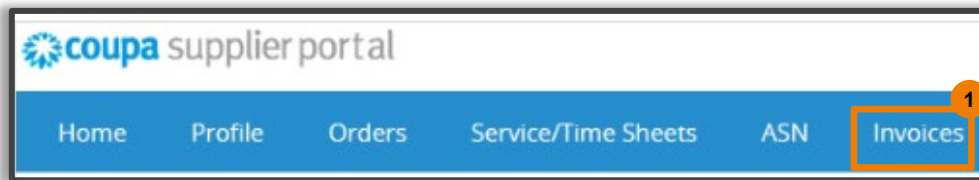
Totals

Taxable Amount	300.00
Subtotal	300.00
Tax	0.00
Total	300.00

Steps to View Invoice Payment Information via CSP

Coupa supplier portal

- 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 elements:

- 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 showing 'Payment Information'. This menu is highlighted with an orange box and a '2' in a circle.
- Showing results for:** 112233 x
- Table:** A table with the following data:

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
- View:** A dropdown menu next to the table row, also highlighted with an orange box and a '2' in a circle.