



Coupa

Submit Invoice in Coupa
Supplier Portal
(Suppliers)

As of September 2019



Overview

Invoices can be created directly from a Purchase Order (PO) in the Coupa Supplier Portal (CSP). Suppliers can also view invoice and payment status.

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.

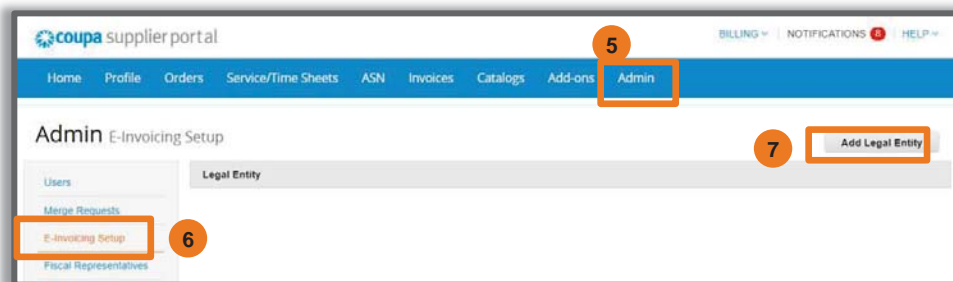
- 4 Click the **Skip** or **Close** button.



Coupa Supplier Portal

First, the user will need to set up a Remit-to Address (step 5 to 16) in the CSP. **If already done, skip to step 17.**

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



Note: Any changes applied in the Admin section will not be reflected for invoice payments by ENGIE. Only changes made the 'Profile' section will be received. Reference the *Create or Update Supplier Information in Coupa Supplier Portal Job Aid*.

8 Populate the following mandatory fields:

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

9 Click the **Continue** button.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

8 * Legal Entity Name Axiom medical

Country United States

This is the official name of your business that is registered with the local government and the country where it is located.

9 Cancel Continue

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

Tell your customers about your organization

Which customers do you want to see this?

All

ENGIE North America

What address do you invoice from?

* Address Line 1 861 Science Center Drive

Address Line 2

* City Hamer

State ID

* Postal Code 83425

Country United States

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

13 Populate the **Banking Information** section and click on **Done** once completed

Note: IBAN, Swift/BIC Code, and the Miscellaneous fields are not required

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 Tax ID in the **Tax ID** field.

15 Click the **Done** button.

What is your Tax ID? ⓘ

Country: United States

Tax ID:

or 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 an invoice.

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

- 17 Click the **Orders** tab.

Home Profile **Orders** Service/Time Sheets

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.

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 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



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

Total	Actions
300.00 USD	18

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 (As listed on the invoice)**
- **Currency**
- **Invoice From Address**
- **Remit To Address**
- **Ship From Address**
- **Attachments**
- **Ship to Address**

Note: Engie Services US SUPPLIERS ONLY: For invoices with retainage, please enter the gross amount. Reference the 'retainage percentage' field on the PO or invoice for the amount of retainage that will be held. For retainage release requests, please submit the request directly to invoices@engiena.coupahost.com; they cannot be submitted via the Coupa Supplier Portal.

Create Invoice Create

General Info

From

19

* Invoice #	INV_112233	* Supplier	9Lenses, Inc.
* Invoice Date	11/29/18	Supplier Tax ID	None
Payment Term	Z030	* Invoice From Address	9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States
* Currency	USD	* Remit-To Address	9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States
Status	Draft	* Ship From Address	9Lenses 1458 Hartway Street Howard, South Dakota 57349 United States
Image Scan	Choose File No file chosen	To	Customer ENGIE North America
Supplier Note		Buyer Tax ID	None
* Attachments	Add File URL Text	* Ship To Address	3551 Centennial Road RR 2 Lyn, ON K0E 1M0 Canada
	Tax_Form.docx		

20 It is recommended to enter taxes by invoice line by ticking the 'Line Level Taxation' checkbox. Please see detailed steps on line level taxation below.

21 Scroll down and populate the remaining mandatory fields:

- Description
- Price
- Qty
- UOM



Note: The portal will default the invoice line price to the remaining amount on each PO line. **Please make sure to adjust the line price(s) as needed.** If you are not invoicing against a line item, please delete that line using red 'x'. **Please do not submit invoices with lines that include a \$0 price.**

22 Enter a **Tax Rate** or **Tax Amount**, if applicable. If Canadian taxes need to be applied, a tax code must be selected from the drop down.

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

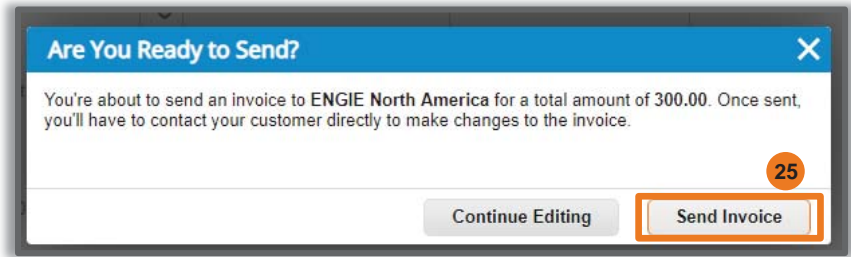
Click the **Submit** button.

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

Are you Ready to Send?

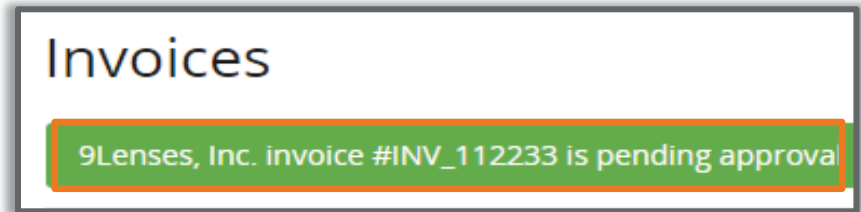
The **Are You Ready to Send?** pop-up window is displayed with the summary of the invoice.

25 Click the **Send Invoice** button.



Invoices

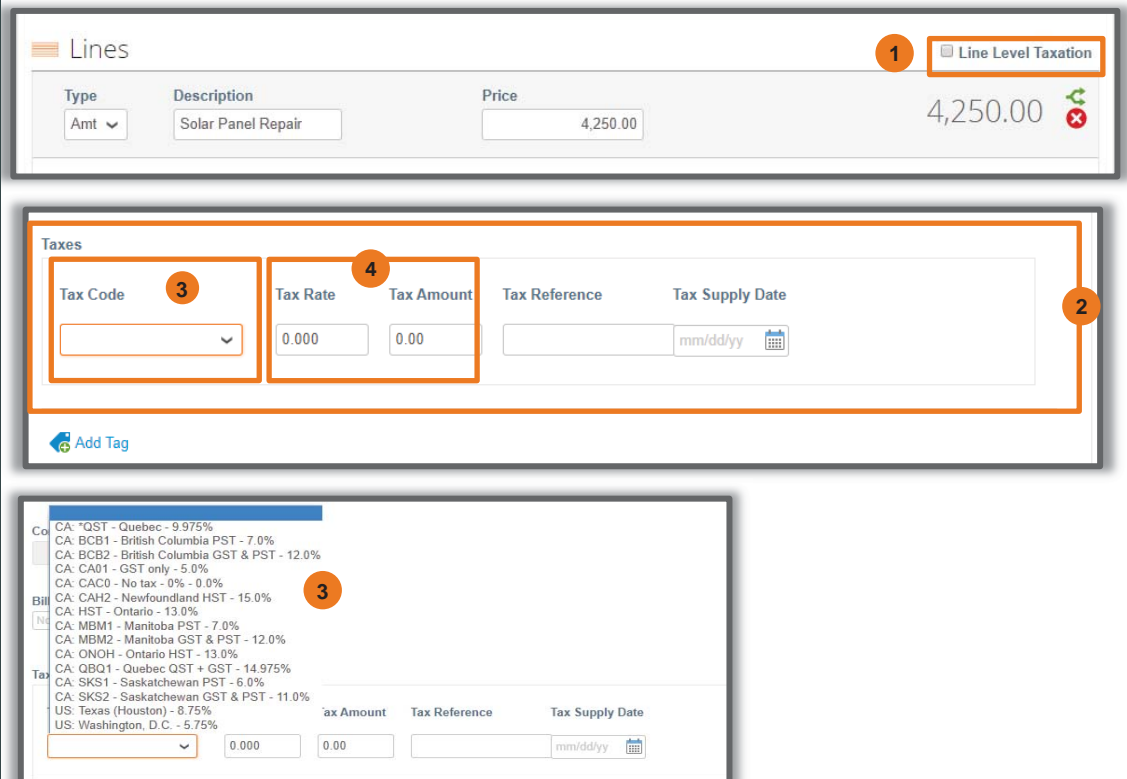
A confirmation message is displayed stating that **Invoice has been sent for approval**.




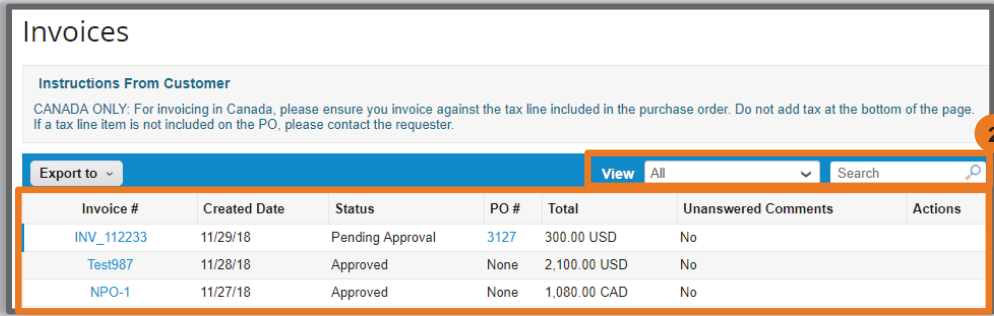
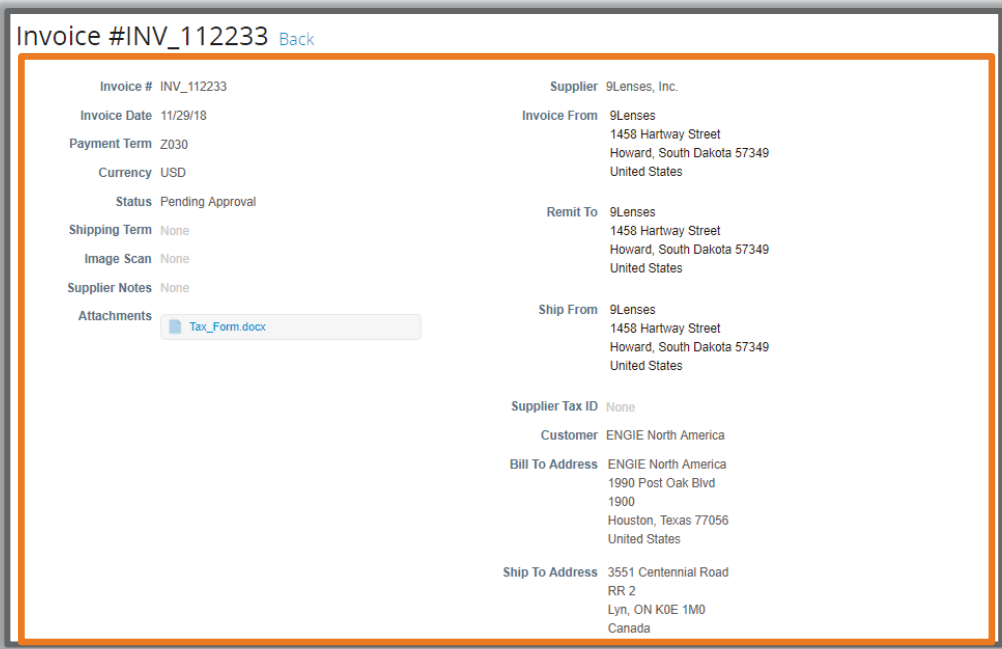
Steps to Create an Invoice via CSP - Using Line Level Taxation

Line-Level Taxation

- 1 Click the **Line Level Taxation** tick box located above the line item price information.
- 2 A **Taxes** section is now made available within the line item section of the invoice
- 3 For Canadian Taxes Only - Select the appropriate value within the **Tax Code** dropdown
- 4 Enter the tax value within the **Tax Rate** or **Tax Amount**



Steps to View Invoice Status via CSP

<p><i>Coupa supplier portal</i></p> <p>1 Click the Invoices tab.</p>																													
<p><i>Invoices</i></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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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.