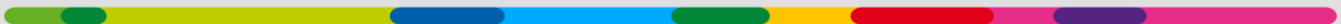




Coupa

**Submit Invoice or Credit
Note in Coupa Supplier
Portal
(Suppliers)**

As of September 2020



Overview

Invoices or Credit Notes 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
- Create a Credit Note 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.

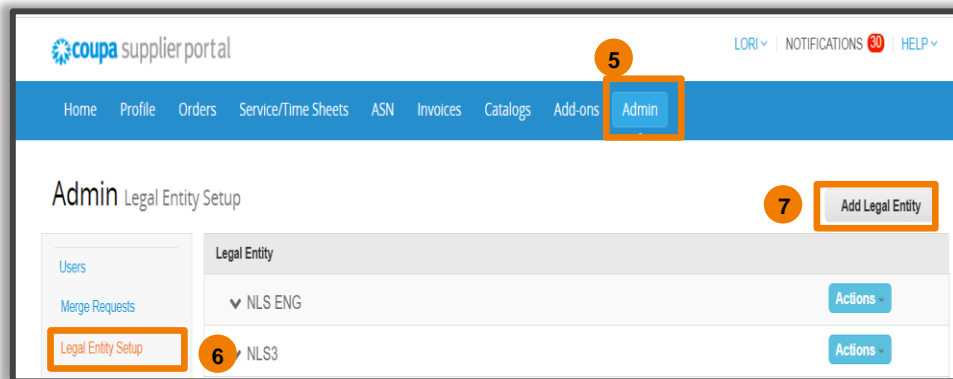
- 4 Click the **Skip** or **Close** button.



Coupa Supplier Portal

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

- 5 Click the **Admin** tab.
- 6 Got to **Legal Entity 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.

- 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 **Banking Information** section and click on **Done** once completed

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

The screenshot shows the 'Banking information' form. An orange box highlights the following fields: Bank Account Country (United States), Bank Account Currency, Bank Name, Beneficiary Name, Routing (Bank Code) Number (with a dropdown for 'Routing Numt'), Account Number, Account Number Confirm, IBAN, SWIFT/BIC Code, and Bank Account Type (Business). Below these is the 'Bank address' section with fields for Address Line 1, Address Line 2, City, State, and Postal Code. To the right, a 'RECOMMENDED' note states: '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)'. A '13' callout is in the top right corner.

14 Scroll down further and enter the Tax ID in the **Tax ID** field.

15 Click the **Done** button.

The screenshot shows the 'What is your Tax ID?' section. An orange box highlights the 'Country' dropdown (United States) and the 'Tax ID' input field. Below this is a link 'Add additional Tax ID' and a 'Miscellaneous' section with 'Invoice From Code' and 'Preferred Language' (English (US)). At the bottom right, there are 'Cancel' and 'Done' buttons. A '14' callout is in the top right corner, and a '15' callout is in the bottom right corner.

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 **Legal Entity**, after clicking the gold icons, Click Add Legal Entity (+ icon) and follow steps 11 to 19 to create a Legal Entity.

Total Actions

300.00 USD

Choose Invoicing Details

* Legal Entity Select + Add New

* Remit-To Select

* Ship From Address Select

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**
- **Invoice From Address**
- **Remit To Address**
- **Ship From Address**
- **Attachments**
- **Ship to Address**

Note: 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+retainage@engiena.coupa.com; they cannot be submitted via the Coupa Supplier Portal.

Note: For invoices with lien waivers, please attach the document in **Attachments > File**

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 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**

Lines Line Level Taxation

Type	Description	Qty	UOM	Price
optical cable 3m		10	each	30.00

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



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.

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

25 Click the **Send Invoice** button.

Are You Ready to Send?

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 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**

The screenshot shows the 'Lines' section of the CSP interface. A line item for 'Solar Panel Repair' is shown with a price of 4,250.00. The 'Line Level Taxation' checkbox is checked. Below the line item, a 'Taxes' section is visible with fields for 'Tax Code', 'Tax Rate', 'Tax Amount', 'Tax Reference', and 'Tax Supply Date'. The 'Tax Code' dropdown is open, showing a list of Canadian tax codes. The 'Tax Rate' field is highlighted with a red box and a '4' in a red circle.

Steps to Create an Credit Note via CSP:

Coupa supplier portal

- 1 Click the **Orders** tab.

The screenshot shows the navigation bar of the Coupa supplier portal. The 'Orders' tab is highlighted with a red box and a '1' in a red circle.

Purchase Orders

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

- Click the **red coin icon** from the **Actions** column of the PO for which you wish to create a credit note.

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 all. If a tax line item is not included on the PO, please contact the requester.

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

Total Assigned To Actions

3,000.00 CAD

Create Credit Note

The **Create Credit Note** screen displays detailed information on the invoice.

- Populate the mandatory fields.
 - Credit Note # - must be less than 16 characters**
 - Credit Note Date**
 - Currency**
 - Invoice From Address**
 - Remit To Address**
 - Ship From Address**
 - Original Invoice #**
 - Original Invoice Date**
 - Attachments**
 - Ship to Address**

Create Credit Note Create

General Info

* Credit Note #

* Credit Note Date 07/17/20

* Payment Term 2015 Net 15 Days

* Currency CAD

Status Draft

* Original Invoice #

* Original Invoice Date mm/dd/yyyy

Image Scan No file chosen

Supplier Note

* Attachments [Add File](#) | [URL](#) | [Text](#)

From

* Supplier NLS Engineering

* Invoice From Address No address selected

* Remit-To Address No address selected

* Ship From Address No address selected

To

Customer ENGIE North America

Bill To Address ENGIE Canada
105 Commerce Valley Drive West
Suite 410
Markham, ON L3T 7W3
Canada

* Ship To Address 464 rue Saint-Mathias Apt.
Quebec, QC G1K 1B6
Canada

4

Scroll down and populate the remaining mandatory fields:

- **Description**
- **Price**
- **Qty**
- **UOM**



Note: Please make sure that the Qty or Amount is in negative value. **Adjust the line qty or amt as needed.**

5

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.

6

Click the **Calculate** button to see credit note totals prior to submitting.

7

Click the **Submit** button.

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.

8

Click the **Send Credit Note** button.

Invoices

A confirmation message is displayed stating that **Credit Note is Processing**. Then **Credit Note Status** ends to **Pending Approval**.

The screenshot shows the 'Invoices' page. At the top, a green banner displays the message: 'NLS Engineering credit note #CN0001 is processing'. Below this is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row of data is highlighted with an orange box, showing Invoice # CN0001, Created Date 07/17/20, Status Pending Approval, PO # 8225, Total -100.00 CAD, and Unanswered Comments No.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
CN0001	07/17/20	Pending Approval	8225	-100.00 CAD	No	

Steps to View Invoice Status via CSP

Coupa supplier portal

- 1 Click the **Invoices** tab.

The screenshot shows the Coupa supplier portal navigation bar. The 'Invoices' tab is highlighted with an orange box and a circled '1'.

Invoices

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

- 2 Click the required invoice from 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.

The screenshot shows the 'Invoices' screen. At the top, there is a section for 'Instructions From Customer' with a note for Canada. Below this is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The table is highlighted with an orange box and a circled '2'. The first row of data is highlighted with an orange box, showing Invoice # INV_112233, Created Date 11/29/18, Status Pending Approval, PO # 3127, Total 300.00 USD, and Unanswered Comments No.

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	

Invoice #.

The Invoice is displayed with the Payment Information.

1. **Status:** Payment Status
2. **Payment Date:** Date the Invoice is Paid.
3. **Amount Paid:** Total Amount Supplier will be receiving.

Invoice #INV_112233 [Back](#)

Invoice # INV_112233

Invoice Date 11/29/18

Payment Term 2030

Currency USD

Status Pending Approval

Shipping Term None

Image Scan None

Supplier Notes None

Attachments [Tax_Form.docx](#)

Supplier 9Lenses, Inc.

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

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

Ship From 9Lenses
1458 Hartway Street
Howard, South Dakota 57349
United States

Supplier Tax ID None

Customer ENGIE North America

Bill To Address ENGIE North America
1900 Post Oak Blvd
1900
Houston, Texas 77056
United States

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

Payments

Status Externally Paid **1**

Mark as Paid

Paid-in-Full Date 09/25/19

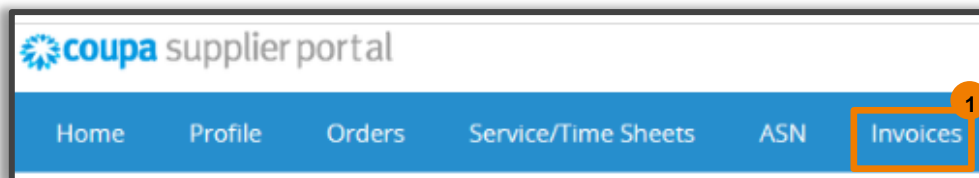
Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted 2	09/25/19	Payment	0020000161	525.18 3
Total Reconciled				525.18
Invoice Total				525.18
Remaining Balance				0.00

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.

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.

Export to View **Payment Information** 112233

Showing results for 112233 x

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