



Coupa

**Submit Invoice from
Purchase Order Email
(Suppliers)**

As of July 2020



Overview

Invoices can be created directly from the Supplier Actionable Notifications (SAN).



Note: The link is sent to the supplier via an email.

Objective

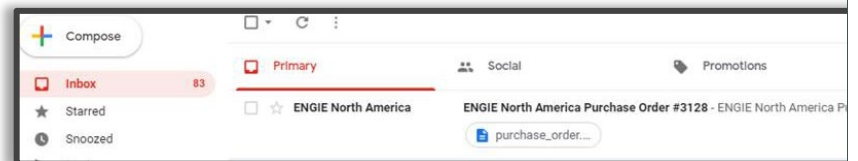
This job aid describes the process to create an Invoice via SAN.

Steps to Create an Invoice via SAN:

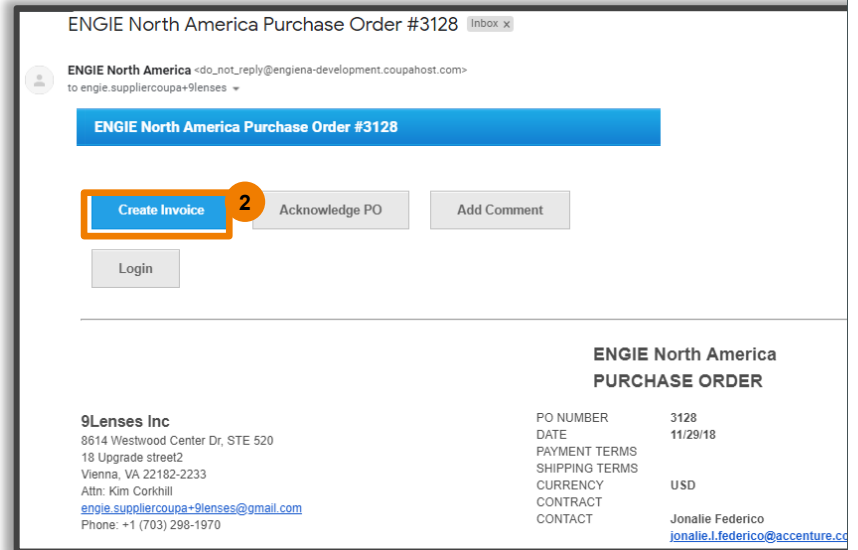
Email Inbox

Login to your email inbox.

- 1 Open the Purchase Order e-mail received.



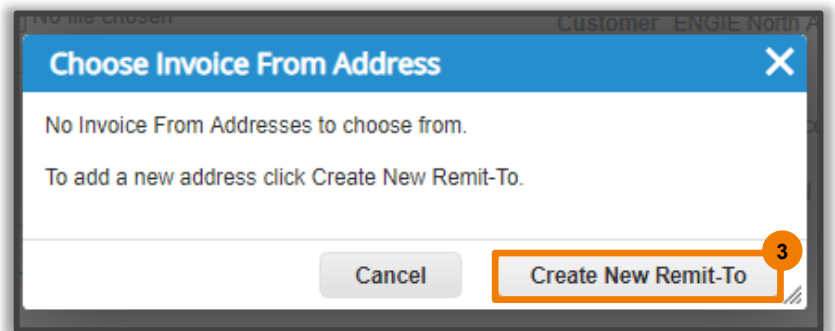
- 2 Click the **Create Invoice** button.



Choose Invoice From Address

You need to set up the Remit-to Address (step 3 to 5).

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

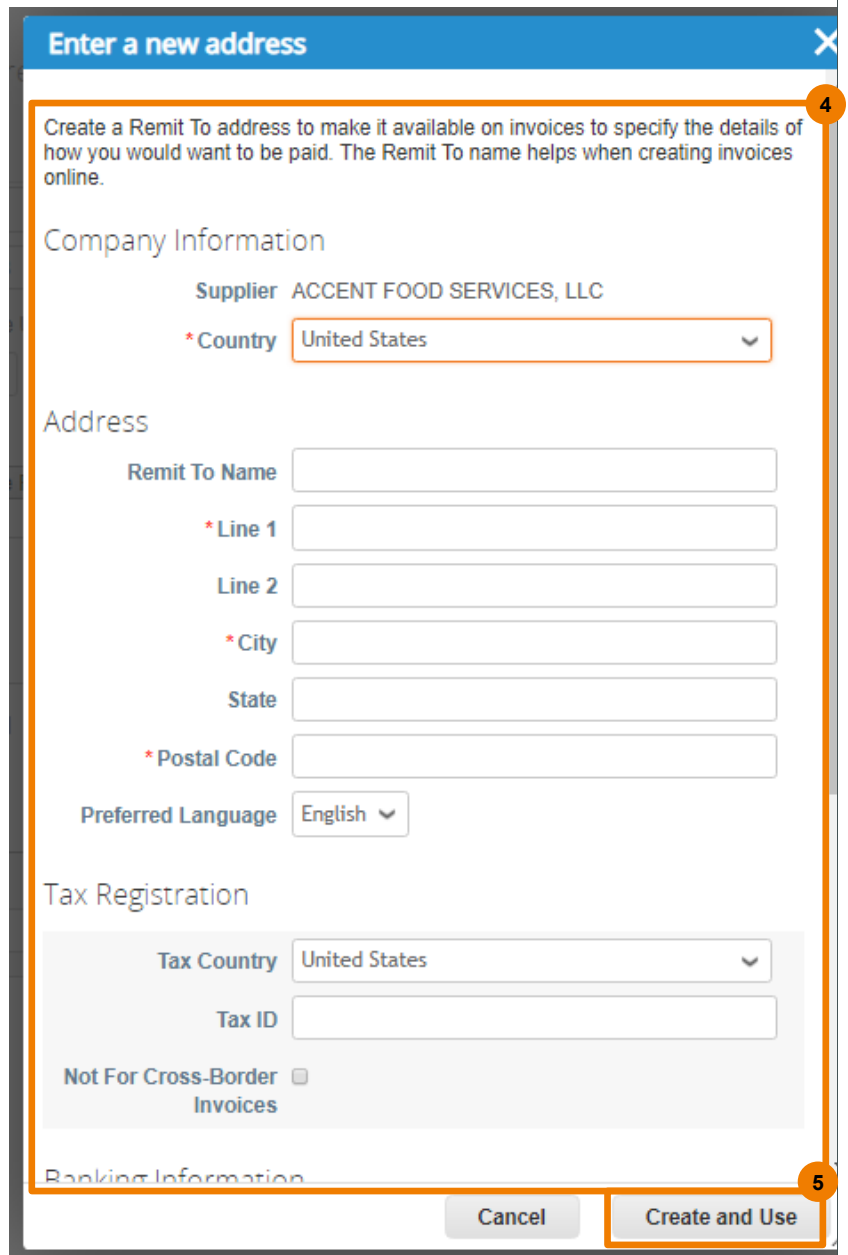


Enter a new address Screen

- 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 on the Invoice screen



Create Invoice

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

- 6 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+retainage@engiena.coupa host.com; they cannot be submitted via the Coupa Supplier Portal.

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

- 8 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.**

- 9 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.
- 10 Click the **Calculate** button to see invoice totals prior to submitting. Click the **Submit** button.
- 11 To save the draft to continue to work on the form later, click the **Save as draft** button instead.

Totals & Taxes	
Lines Net Total	1,353.00
Shipping	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.000
Total Tax	0.00
Net Total	1,353.00
Total	1,353.00

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit

Are you Ready to Send?

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

- 12 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 **1,353.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Buttons: Continue Editing, Send Invoice

Invoices

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

The screenshot shows the 'Invoices' page. At the top, a green banner states: '9Lenses, Inc. Invoice #INV_5678 is pending approval'. Below this, there are 'Instructions From Customer' and a note for Canada. A table lists invoice details:

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

Steps to Create an Invoice via SAN - 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 an invoice. The line item is 'Solar Panel Repair' with a price of 4,250.00. A 'Line Level Taxation' checkbox is checked. Below the line item, a 'Taxes' section is visible with a table for tax details:

Tax Code	Tax Rate	Tax Amount	Tax Reference	Tax Supply Date
	0.000	0.00		mm/dd/yy

A dropdown menu for 'Tax Code' is open, showing various Canadian tax codes such as 'CA: QST - Quebec - 9.975%', 'CA: BCB1 - British Columbia PST - 7.0%', etc. The 'Tax Code' dropdown is highlighted with a red box and a '3'.