

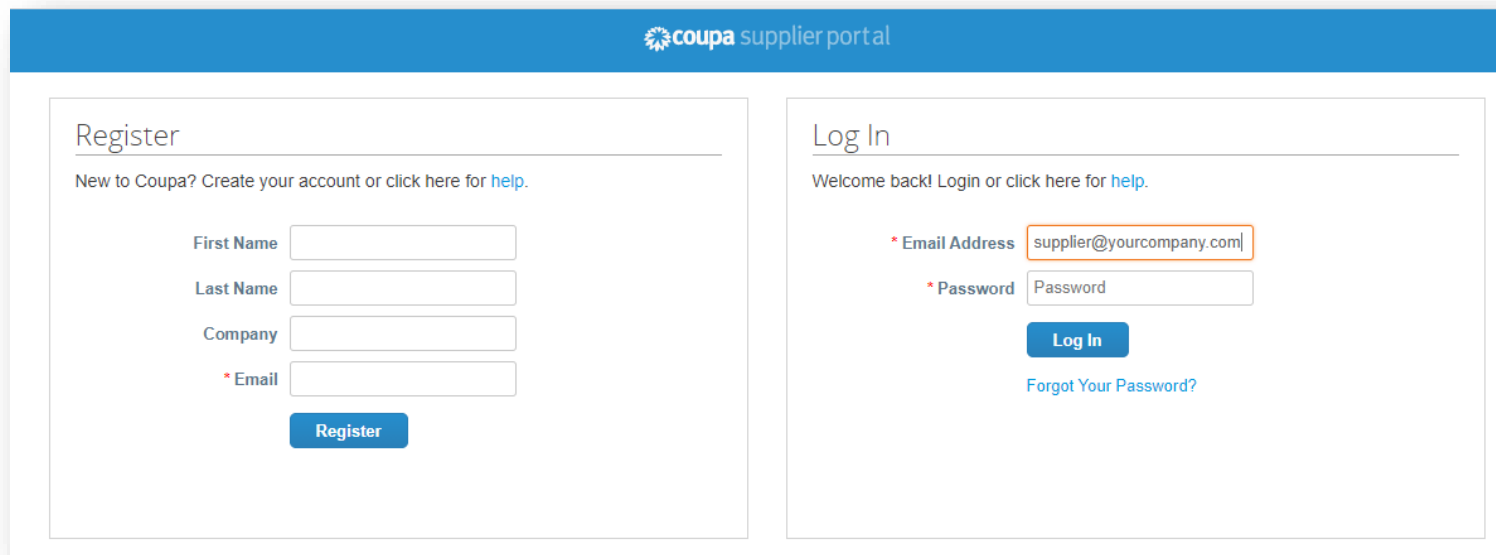


Coupa Supplier Portal: Invoicing – Creating an Invoice Against a Contract

11/3/2020

Creating an Invoice Against a Contract

- Log into the Coupa Supplier Portal (CSP) at:
<https://supplier.coupa.com/>
using the previously established email address and password.
- For best results, Google Chrome is the recommended web browser.



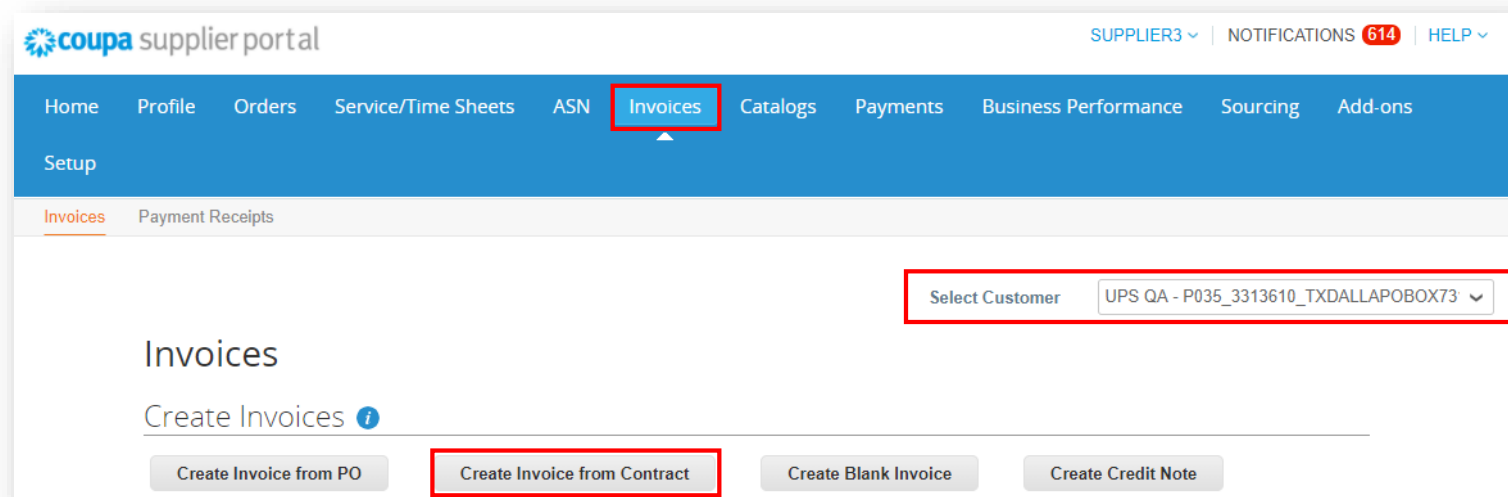
The screenshot displays the Coupa Supplier Portal interface. At the top, a blue header contains the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

The "Register" section includes the heading "Register" and a sub-heading "New to Coupa? Create your account or click here for [help](#).". It features four input fields: "First Name", "Last Name", "Company", and "* Email". A blue "Register" button is positioned below the "Email" field.

The "Log In" section includes the heading "Log In" and a sub-heading "Welcome back! Login or click here for [help](#).". It features two input fields: "* Email Address" (containing the text "supplier@yourcompany.com") and "* Password" (containing the text "Password"). A blue "Log In" button is positioned below the "Password" field. A link for "Forgot Your Password?" is located below the "Log In" button.

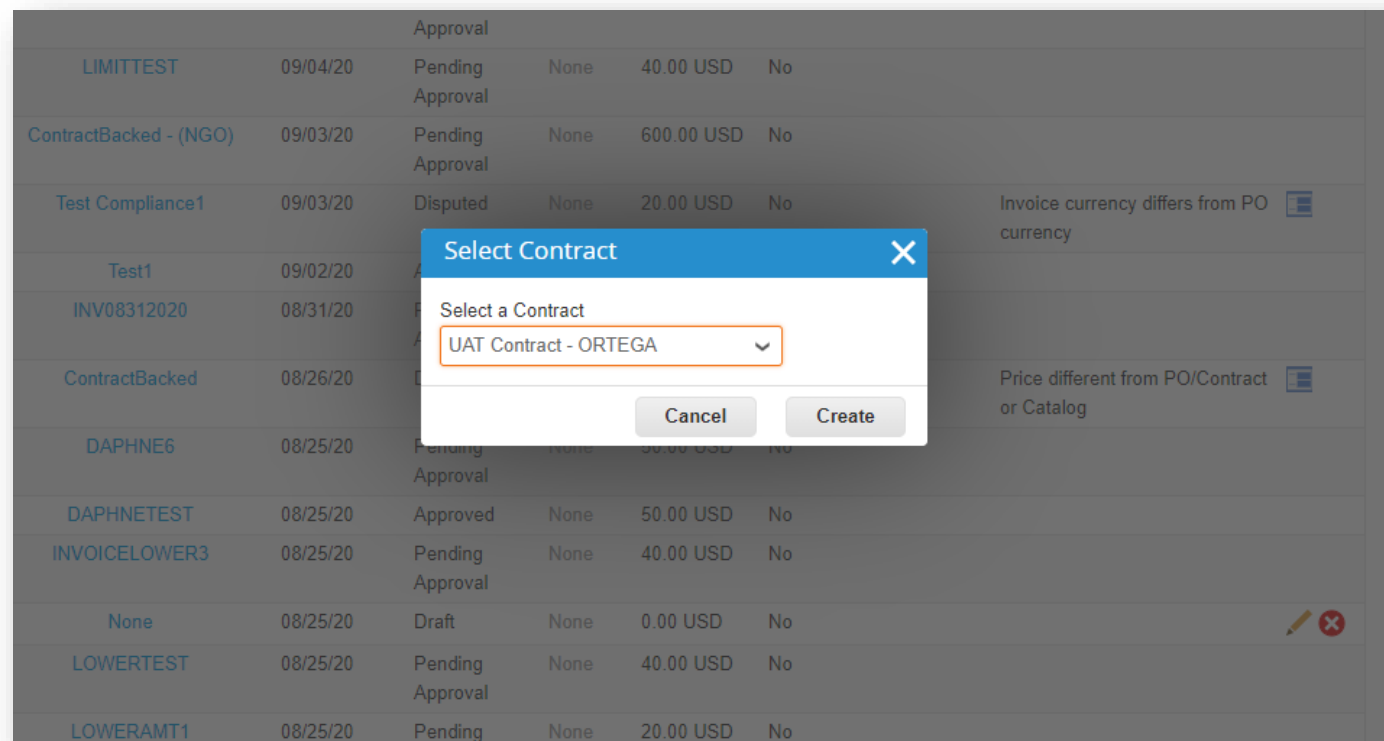
Creating an Invoice Against a Contract

- Click on the *Invoices* tab at the top of the page.
- From the *Select Customer* dropdown menu, select the appropriate customer (UPS).
- Click *Create Invoice from Contract*.



Creating an Invoice Against a Contract

- On the *Select Contract* pop up, make a selection from the dropdown menu.
- Click *Create*.



Creating an Invoice Against a Contract

- Complete each required field on the *Choose Invoicing Details* screen, by clicking *Add New* and entering the information or selecting previously created information from the dropdown menus.
- Click *Save*.

The screenshot shows a software interface with a table in the background and a modal dialog box titled "Choose Invoicing Details". The table has columns for "Description", "Qty", "UOM", and "Price". The dialog box contains the following fields:

- * Legal Entity:** A dropdown menu with "Main Remit To" selected and a green "+ Add New" button.
- Invoice From:** A text area containing "123 Main Street", "Atlanta, GA 30075", "United States", and "United States (123456789)".
- * Remit-To:** A dropdown menu with "123 Main Street, Atlanta, GA 30075" selected and a green "+ Add New" button.
- * Ship From Address:** A dropdown menu with "123 Main Street, Atlanta, GA 30075" selected and a green "+ Add New" button.

At the bottom of the dialog box, there are two buttons: "Cancel" and "Save".

Creating an Invoice Against a Contract

- In the *General Info* section, enter a unique invoice number in the *Invoice #* field (50 character limit).
- Verify the *Payment Term* field is defaulted to the contractually agreed upon terms.
- Suppliers can add comments in the *Supplier Note* or *Attachments* fields. Supporting documentation can also be added in the *Attachments* field.

Note: If there are *Miscellaneous* line items, supporting documentation is required.

- Click *Add*.

General Info

* Invoice # SampleCBlinv-01 ✓

Invoice Date Set automatically at time of submission

Payment Term EOAP + NET 45

* Currency USD

Delivery Number

Status Draft

Image Scan Choose File No file chosen

Supplier Note

Attachments ⓘ Add File | URL | Text

This is just an example of how the text field can be used

Add

From

* Supplier P035_3313610_TXDALLAPOBOX731_BEST E FOR BUSINESS

* Invoice From Address Main 2 123 Main Street Chicago, 85054 United States

* Remit-To Address Main 2 123 Main Street Chicago, 85054 United States


* Ship From Address Main 2 123 Main Street Chicago, 85054 United States

Customer UPS QA


* Bill To Address PACKAGE & HUB SPREAD: CAVAN-VAN NUYS-CAVAN972668 UPS -PACKAGE & HUB SPREAD:

Creating an Invoice Against a Contract

- Scroll down to the *To* section and click the magnifying glass next to the *Bill To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose*.

 To


Customer UPS QA

* **Bill To Address** 10 Upper Pond 
Parsippany, New Jersey 07054
United States


VAT ID 123456789


Buyer Tax ID


Buyer Tax ID None

* **Ship To Address** 0083 DISTRICT ALLOCATION 
8315 NE AIRTRANS WAY
PORTLAND, OR 97218
United States
Location Code: ORAIRAO2651

Choose an Address ✕

View All Search 


Legal Entity Name	Line 1	Line 2	City	State	Postal Code	Country	Actions
None	10 Upper Pond	None	Parsippany	New Jersey	07054	United States	 Choose

 Add Line Totals & Taxes

Creating an Invoice Against a Contract

- Click the magnifying glass next to *Ship To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose*.
- Complete the *Requester Email* and *Requester Name* fields.

Note: The *Requester* is the UPS contact who requested the good(s) or service(s).

* **Ship To Address** 0083 DISTRICT ALLOCATION 
8315 NE AIRTRANS WAY
PORTLAND, OR 97218
United States
Location Code: ORAIRAO2651

* **Requester Email**

* **Requester Name**

Description

Please provide a description

Choose an Address Buyer Tax ID: None

Create View All Advanced Search

Name	Line 1	Line 2	City	State	Postal Code	Country	Location Code	Attention	Actions
-AZCAS880850	533 W. COTTONWOOD LA	None	CASA GRANDE	AZ	85222	United States	AZCASXN0694	None	<input checked="" type="checkbox"/> Choose
-VARMN722324	UPS FREIGHT - MRKTG INTL - MEXICO	1000 SEMMES AVE	RICHMOND	VA	23224	United States	VARMNXN0434	None	<input checked="" type="checkbox"/> Choose
0076 DISTRICT ALLOCATION-AKERI976076	0076 DISTRICT ALLOCATION	6200 LOCKHEED AVE	ANCHORAGE	AK	99502	United States	AKERIAO2648	None	<input checked="" type="checkbox"/> Choose
0076 DISTRICT PRICING-WAGAT872076	UPS -0076 DISTRICT PRICING	13035 GATEWAY DR #149	SEATTLE	WA	98168	United States	WAGATZ01142	None	<input checked="" type="checkbox"/> Choose
0083 DISTRICT ALLOCATION-ORAIR976083	0083 DISTRICT ALLOCATION	8315 NE AIRTRANS WAY	PORTLAND	OR	97218	United States	ORAIRAO2651	None	<input checked="" type="checkbox"/> Choose
0083 DISTRICT PRICING-ORPOR872083	0083 DISTRICT PRICING	6707 N. BASIN AVE.	PORTLAND	OR	97217	United States	ORPORZ05097	None	<input checked="" type="checkbox"/> Choose
0086 DISTRICT PRICING-CAOGO872086	0086 DISTRICT PRICING	1975 ADAMS AVE	SAN LEANDRO	CA	94577	United States	CAOGOZ00510	None	<input checked="" type="checkbox"/> Choose
0212 DISTRICT ALLOCATION-ILBDL976012	0212 DISTRICT ALLOCATION	2055 ARMY TRAIL	ADDISON	IL	60101	United States	ILBDLZ00916	None	<input checked="" type="checkbox"/> Choose
0212 DISTRICT PRICING-ILBDL872012	0212 DISTRICT PRICING	2055 ARMYTRAIL RD	ADDISON	IL	60101	United States	ILBDLZ05077	None	<input checked="" type="checkbox"/> Choose
0212 PRELOAD ASSIST-ILBDL212PAS	0212 PRELOAD ASSIST	2055 ARMY TRAIL	ADDISON	IL	60101	United States	ILBDLZ01859	None	<input checked="" type="checkbox"/> Choose

Prev 1 2 3 ... Next

Lines Net Total 0.00

Creating an Invoice Against a Contract

- Scroll down to the *Lines* section. Select the *Type* from the dropdown menu.
- Enter a description, quantity, unit of measure (UOM), and price in the corresponding fields.
- To add line items to the invoice, click *Add Line* and complete necessary fields.

The screenshot shows the 'Lines' section of an invoice creation interface. At the top right, there is a checkbox for 'Line Level Taxation'. Below this is a table with columns for 'Type', 'Description', 'Qty', 'UOM', and 'Price'. The 'Type' dropdown is set to 'Qty', 'Description' is 'Consulting Services', 'Qty' is '10', 'UOM' is 'Work Hour', and 'Price' is '20.00'. To the right of the table, the total price is displayed as '200.00' with a red 'X' icon. Below the table, there are fields for 'PO Line' (set to 'None') and 'Supplier Part Number'. At the bottom left, there is a green plus icon and the text 'Add Line'. At the bottom right, there is a link for 'Totals & Taxes'. There is also an 'Add Tag' button with a tag icon.

Type	Description	Qty	UOM	Price	
Qty	Consulting Services	10	Work Hour	20.00	200.00

PO Line: None

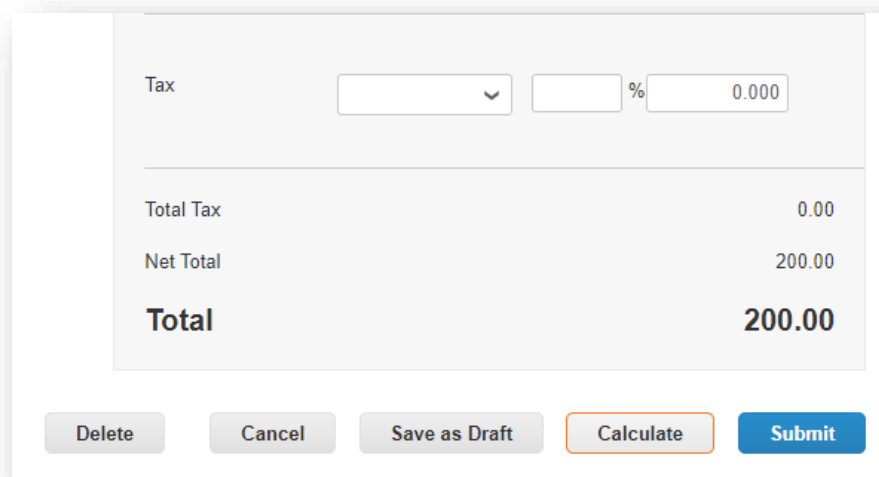
Supplier Part Number: []

+ Add Line

Totals & Taxes

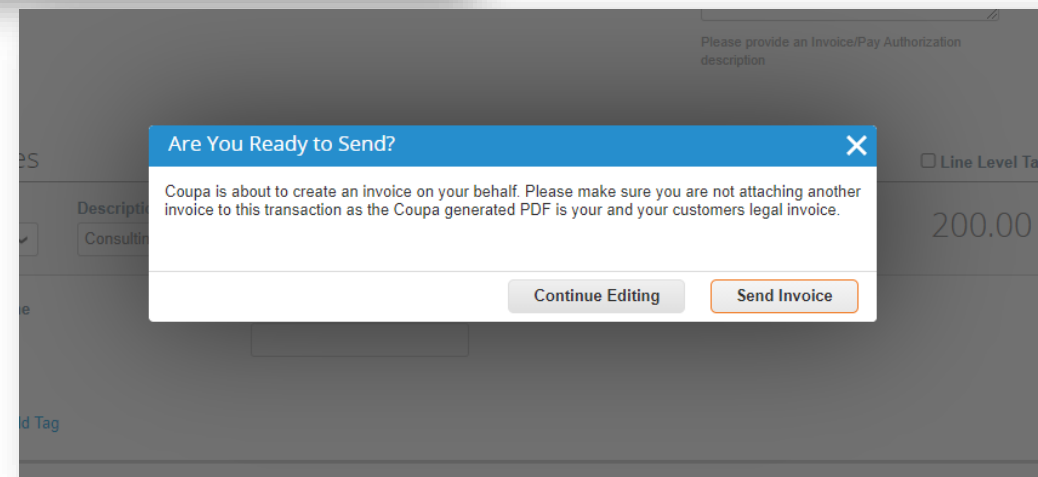
Creating an Invoice Against a Contract

- Scroll down and click the *Calculate* button to validate the total amount.
- Once the total is validated and all required fields are completed, click the *Submit* button.
- Click *Send Invoice* on the *Are You Ready to Send* popup.



Tax %

Total Tax	0.00
Net Total	200.00
Total	200.00



Are You Ready to Send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.



Creating an Invoice Against a Contract

- On the *Invoices* page, the newly created invoice should have a status of *Processing*.
- Users will be notified of invoice status updates via online, email, and/or SMS (text) messaging, depending on how notifications were set up.
- Got questions? Need help? Email supplyline@ups.com for assistance.

Create Invoices i

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to ▼ View All ▼ Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	10/01/20	Draft	None	0.00 USD	No		 
ContractBacked - Martindale	10/01/20	Processing	None	200.00 USD	No		
Testpendingaction2	09/30/20	Pending Approval	None	2,370.50 USD	No		



THANK YOU