COMPASS

How to Create a Non-PO Backed Invoice

Log into the Coupa Supplier Portal - https://supplier.coupahost.com with your credentials when you first registered. If you forgot your password, click on "Forgot Your Password?" and Coupa will send an auto generated email to you. If you did not receive the email, check your Spam/Junk Folder.
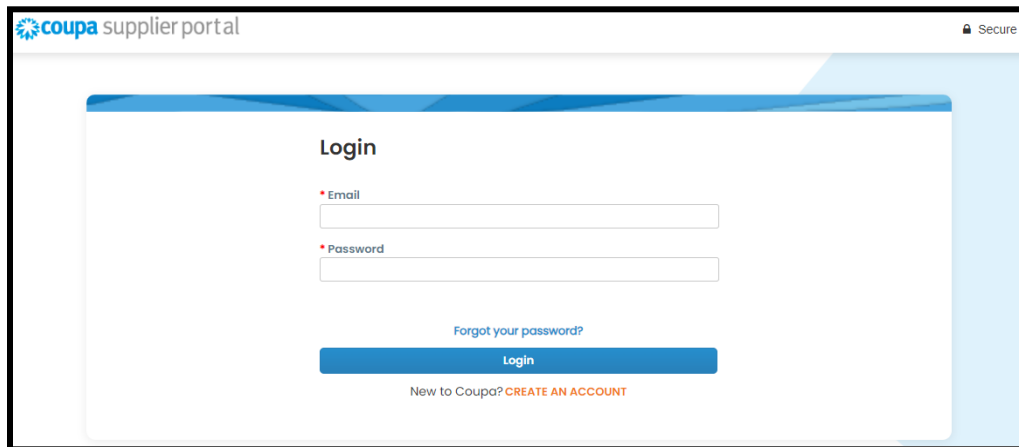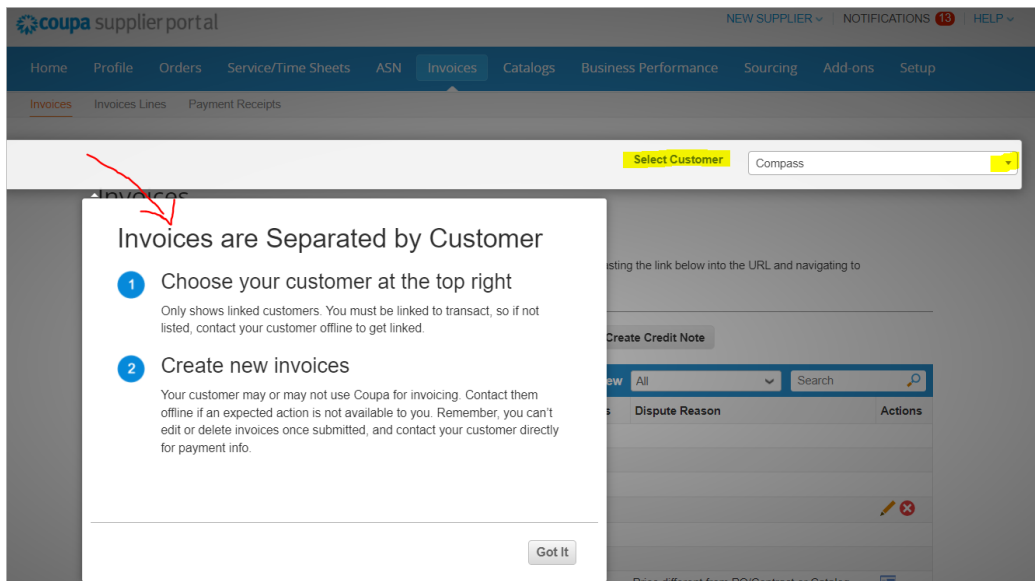

After logging in, you will see the Homepage of your CSP.
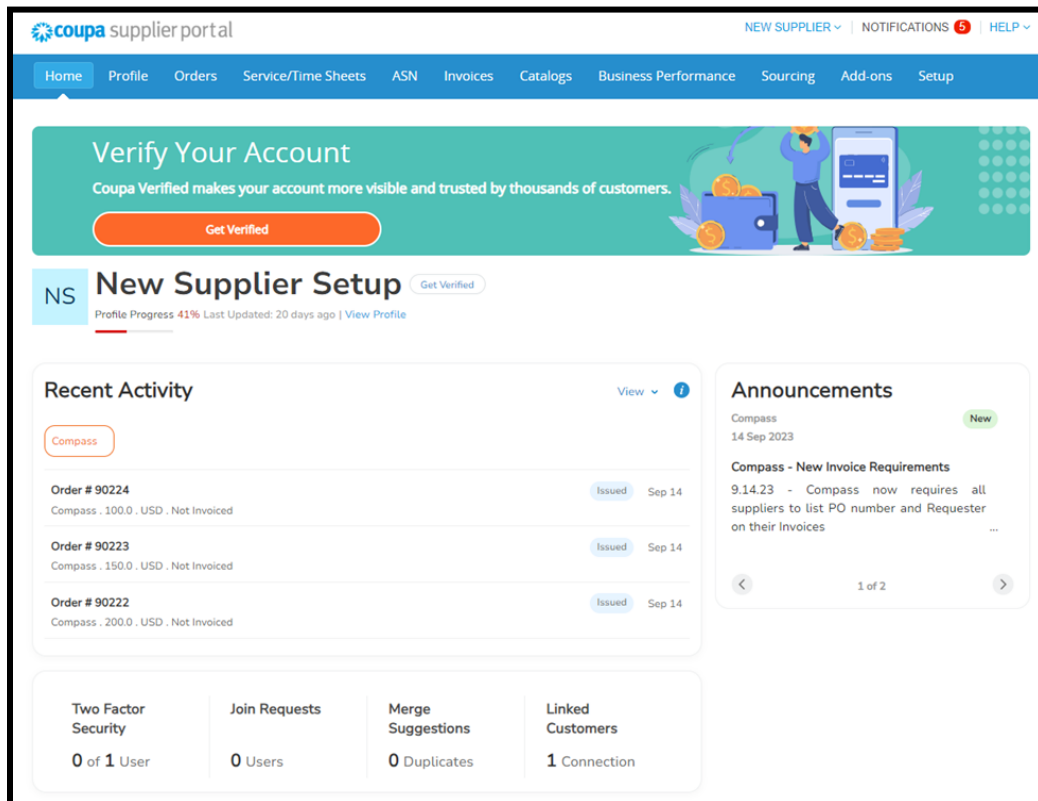
COMPASS

Click on the "**Invoices"** tab in the blue ribbon. This is where your Customer invoices are located.

- Choose your customer at the top right by clicking the dropdown menu, as Invoices are listed by Customer

- If you are having trouble selecting a specific Customer to view their Invoices you will need to speak to your CSP Admin to provision you access to that customer, via Invite User.
  - If you are the CSP Admin please make sure you are linked to Compass by going to Setup and then Customer Setup, select Compass and make sure you see this screen.
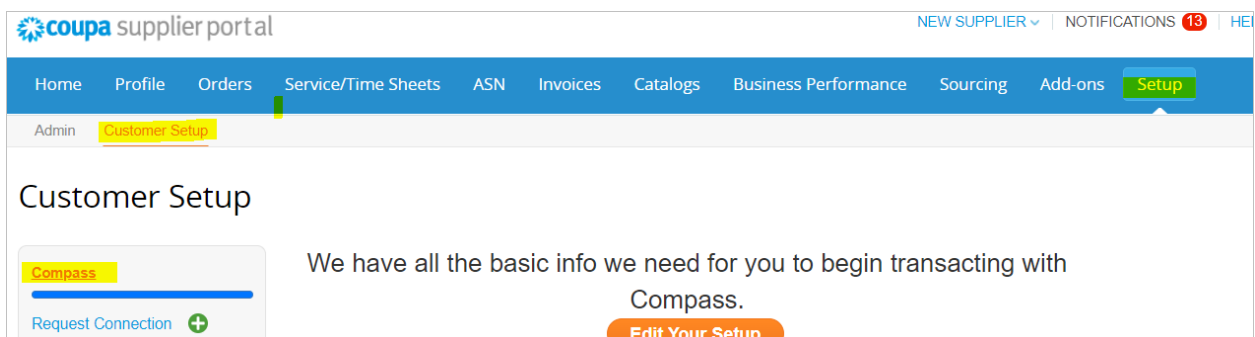
COMPASS

Click on "**Create Blank Invoice**". If you do not have this functionality please email Coupa@Compass.com as Compass will need to enable it on our end.

A new screen will appear. Populate the general information about the invoice. Please note that the fields with the red asterisk (*) are required fields. Ensure that the Invoice #, Invoice Attachment, name and email of the Compass person "Requester" are completed.

<u>Your invoice attachment must contain the following or it will be Rejected back to you</u>

- Supplier Name
- Supplier contact details
- Compass Contact Name / Requester Name
- Compass address where goods / services were delivered or performed
- Invoice Date - date invoice is submitted to Compass
- Invoice Due Date
- PO number (if applicable)
- Full description of items / service
- Quantity and Amount

COMPASS

Scroll down to the Lines section and populate the Type, Description of the Service or Product and the Price information. If there are multiple lines items on the invoice, click on the green circle "Add Line" icon and repeat the process.

Include the Shipping, Handling, Miscellaneous and Tax information as needed as they must be placed on the specific lines at the end of the invoice. **NOTE: Taxes, shipping, handling and/or miscellaneous fees are not to be bundled into the line item total**

Then click "Submit"

If you need to provide a comment to the Compass requester, scroll down to the "Comments"section. Enter your comment by typing @user name and then your comment. Then click the "Add Comment" button. Once ready, click "Submit".

Confirm that you are ready to send an invoice to Compass by clicking "Send Invoice"

A green banner will appear indicating that your invoice is pending approval from Compass.

COMPASS

Additional Help - To Fix Error(s) or Save as a Draft:

FIxing Errors: After you click Send Invoice, Coupa checks for errors and/or incomplete fields. If this happens items will be called out in red. **Fix the errors, then click Submit and Send Invoice**

You MUST click Send Invoice, if you do not Compass will not receive your invoice.

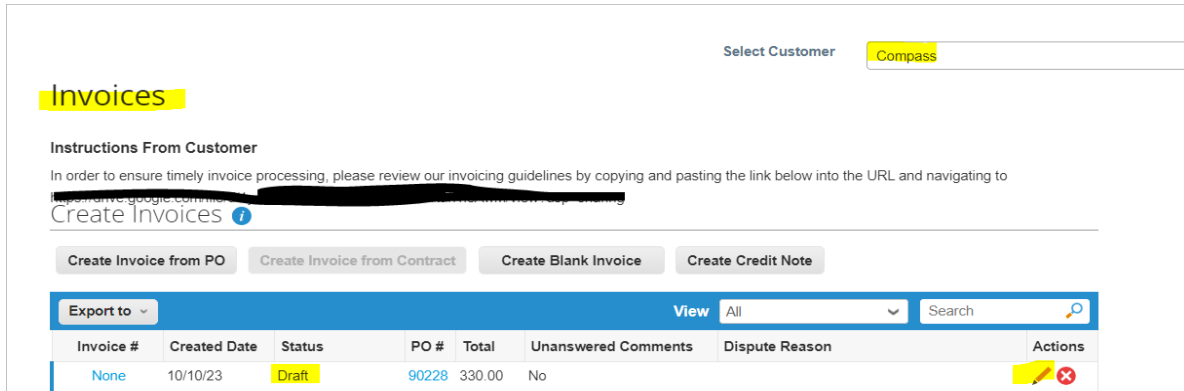When the invoice is successfully sent it will take you back to the Invoice tab and a banner like this will appear.

You have now successfully sent Compass your Non-PO backed Invoice

Saving as a Draft

Click Save as Draft if you need to come back to it at a later time.

1) To find your Draft invoice click on the Invoice tab, Select Compass as the customer and find the invoice in Draft Status.
2) Click the pencil icon to continue where you left off, add any additional info then click Submit

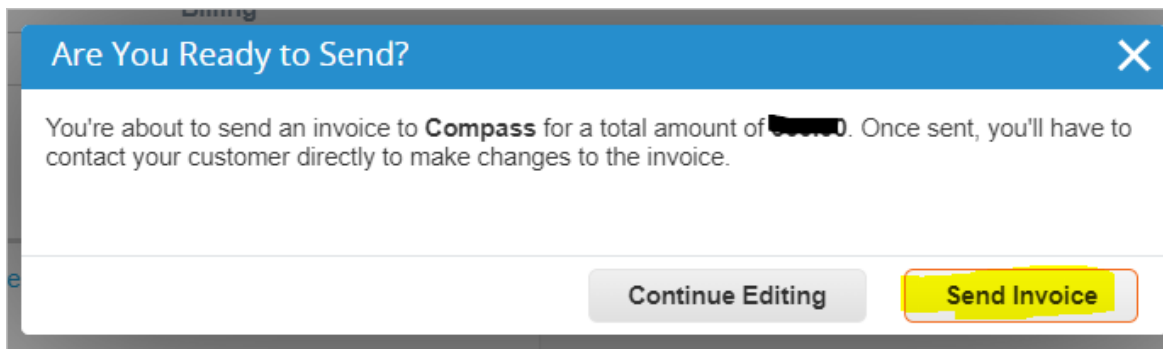Once you click Submit - you will receive this sub-window. **You MUST click Send Invoice, if you do not Compass will not receive your invoice.**

When the invoice is successfully sent it will take you back to the Invoice tab and a banner like this will appear.

You have now successfully sent Compass your Non-PO backed Invoice