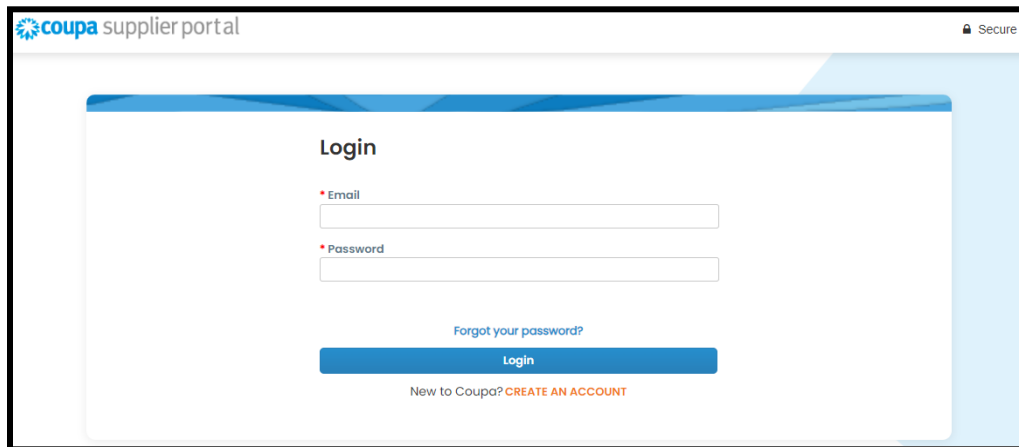


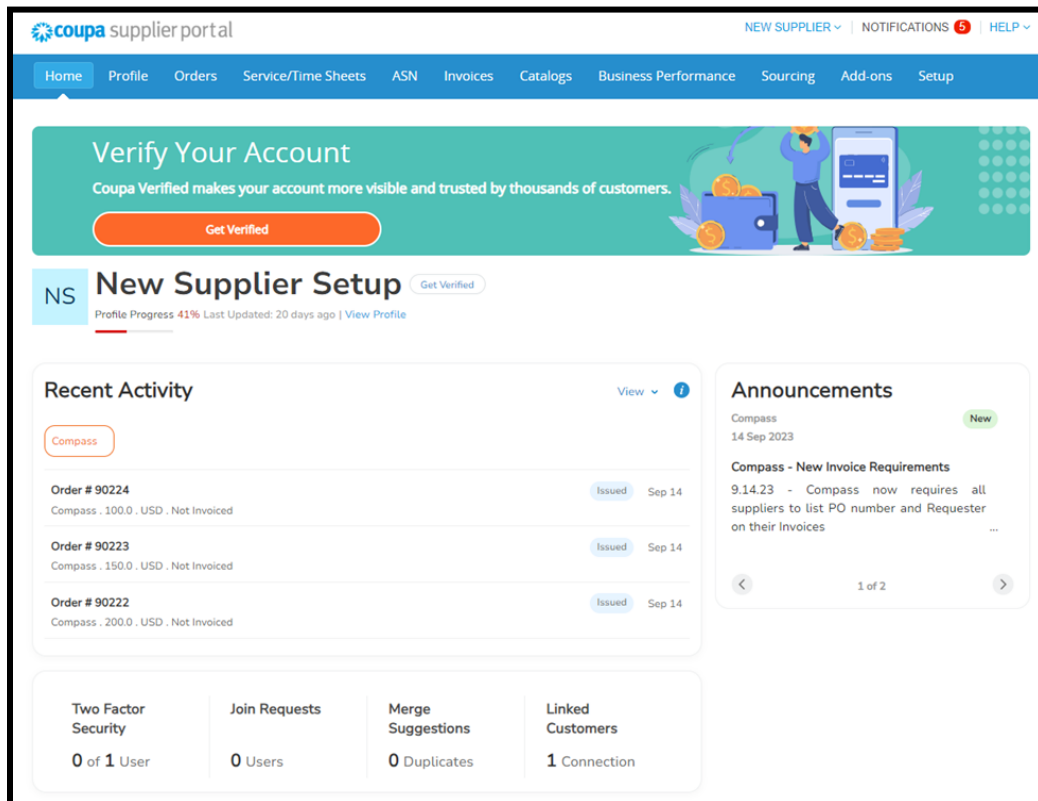
COMPASS

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.



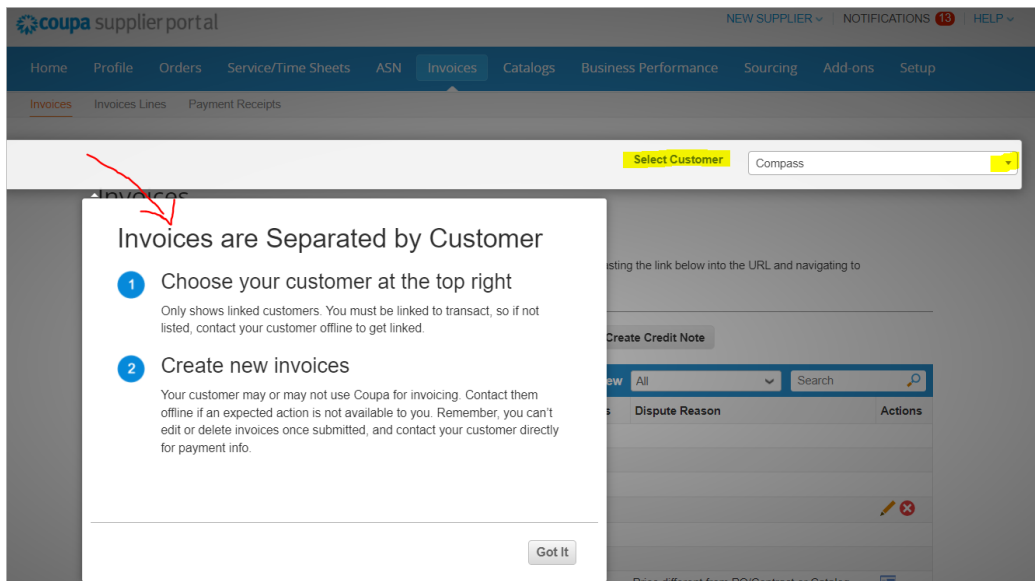
After logging in, you will see the Homepage of your CSP.



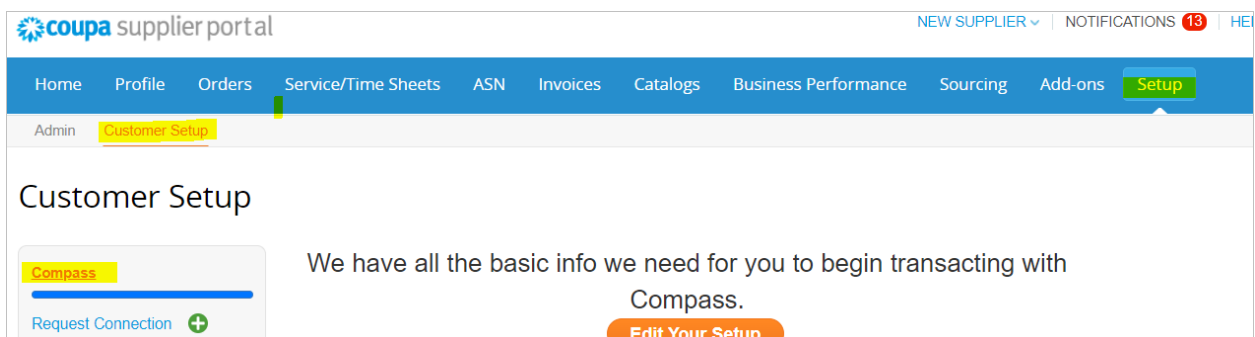
COMPASS

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.

The screenshot shows the 'Invoices' section of the Coupa Supplier Portal. The 'Invoices' menu item is highlighted in the top navigation bar. A yellow banner at the top indicates '1 customer announcement related to Invoices'. A 'Select Customer' dropdown menu is set to 'Compass'. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice' (highlighted with a red box), and 'Create Credit Note'. A table below shows a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The first row is highlighted in blue.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CSP_091423	09/14/23	Disputed	90223	300.00	Yes	Price different from PO/Contract or Catalog	
CSP0914	09/14/23	Approved	90224	200.00	No		
None	09/14/23	Draft	90224	100.00	No		

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.

Your invoice attachment must contain the following or it will be Rejected back to you

- 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

coupa supplier portal NEW SUPPLIER | NOTIFICATIONS 11 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

You have 1 customer announcements related to Invoices (Compass) [View All Announcements](#)

Select Customer Compass

Create Invoice Create

General Info

- * Invoice #
- * Invoice Date 09/18/23
- Payment Term
- * Currency USD
- Status Draft
- * Invoice Attachment No file chosen
- Supplier Note
- Attachments [Add File](#) | [URL](#) | [Text](#)

From

- * Supplier New Supplier Setup
- Supplier Tax Number
- * Invoice From Address New Supplier Setup
123 main street
delray beach, fl 33122
United States
- * Remit-To Address New Supplier Setup
123 main street
delray beach, fl 33121
United States
- * Ship From Address New Supplier Setup
123 main street
delray beach, fl 33121
United States

To

Customer Compass

Ship to Address No address selected

- * Requester Email
- * Requester Name

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.

COMPASS

The screenshot displays the COMPASS Lines interface. At the top, there is a header with the COMPASS logo and a "Line Level Taxation" checkbox. Below the header, the main form is divided into several sections. The top section contains fields for "Type" (set to "Amt"), "Description" (set to "Janitorial Services"), and "Price" (set to "1,000.00"). To the right of these fields, the total amount "1,000.00" is displayed with a red "X" icon. Below this, there are fields for "PO Line" (set to "None"), "Service/Time Sheet Line" (set to "None"), "Contract" (a dropdown menu), and "Supplier Part Number" (an empty text box). On the left side, there are two buttons: "+ Add Line" and "+ Pick lines from Contract". The "Totals & Taxes" section is highlighted with a red box and contains the following information:

Totals & Taxes	
Lines Net Total	1,000.00
Shipping	<input type="text"/>
Handling	<input type="text" value="100"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/>
Total Tax	0.00
Net Total	1,100.00
Total	1,100.00

At the bottom of the form, there are five buttons: "Delete", "Cancel", "Save as Draft", "Calculate", and "Submit". The "Submit" button is highlighted with a red box.

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".

COMPASS

Comments Mute Comments ^

Enter Comment

[@Maria Panchenko (MariaPanchenko_14729)] Invoice is ready for your review and approval

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

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

Are You Ready to Send? X

You're about to send an invoice to **Compass** for a total amount of **1,100.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing **Send Invoice**

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

Invoices

New Supplier Setup invoice #TESTMP0918 is pending approval X

Instructions From Customer

In order to ensure timely invoice processing, please review our invoicing guidelines by copying and pasting the link below into the URL and navigating to <https://drive.google.com/file/d/1yukcwh-iGQBQix6R4MXm60rtan1IeAwM/view?usp=sharing>

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
TESTMP0918	09/18/23	Pending Approval	None	1,100.00	No		
None	09/18/23	Draft	None	0.00	No		
PMK0914	09/14/23	Pending Approval	90225	100.00	No		
091423	09/14/23	Approved	90224	-200.00	No		
CSP 091423	09/14/23	Disputed	90223	300.00	Yes	Price different from PO/Contract or Catalog	
CSP0914	09/14/23	Approved	90224	200.00	No		
None	09/14/23	Draft	90224	100.00	No		

Per page 15 | 45 | 90

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**

The screenshot shows a 'General Info' form with several fields. A red banner at the top says 'Please fix the errors below'. The fields are: '* Invoice #' (empty, red border), '* Invoice Date' (10/10/23, calendar icon), 'Payment Term' (dropdown menu), '* Currency' (USD), 'Status' (Draft), and '* Invoice Attachment' (Choose File button, No file chosen, red border). A red warning triangle below the attachment field says 'Must be present on invoice'.

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

The dialog box has a blue header 'Are You Ready to Send?' with a close button. The main text says: 'You're about to send an invoice to **Compass** for a total amount of \$5,000.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.' At the bottom, there are two buttons: 'Continue Editing' (grey) and 'Send Invoice' (yellow).

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

The screenshot shows the 'Invoices' tab with a green banner at the bottom that says 'New Supplier Setup invoice #12333 is pending approval' with a close button on the right.

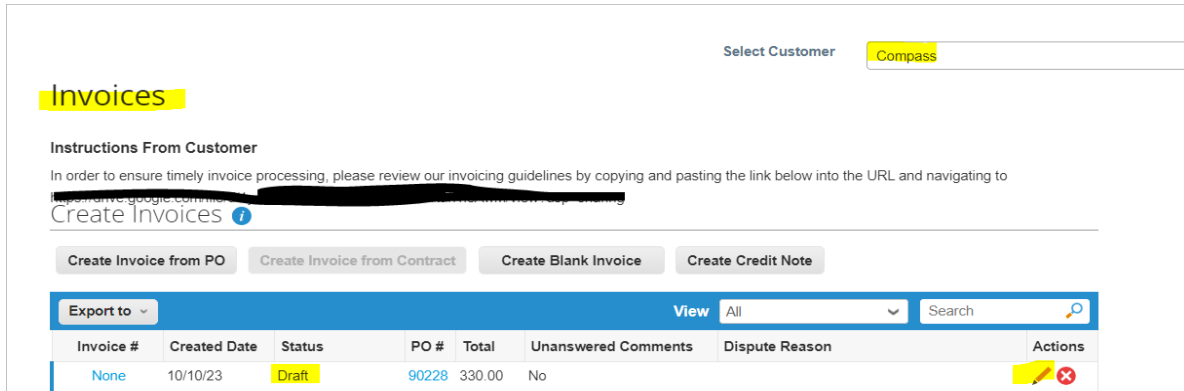
You have now successfully sent Compass your Non-PO backed Invoice

COMPASS

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



Select Customer **Compass**

Invoices

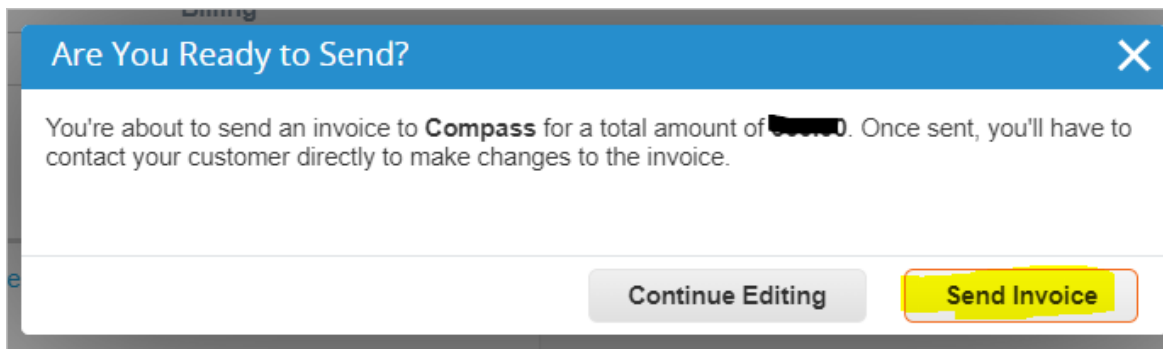
Instructions From Customer
In order to ensure timely invoice processing, please review our invoicing guidelines by copying and pasting the link below into the URL and navigating to [compassive.google.com/invoices](#)
Create Invoices ?

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	10/10/23	Draft	90228	330.00	No		✏️ ✖️

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.**



Are You Ready to Send? ✕

You're about to send an invoice to **Compass** for a total amount of **\$330.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing **Send Invoice**

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



Invoices

New Supplier Setup invoice #12333 is pending approval ✕

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