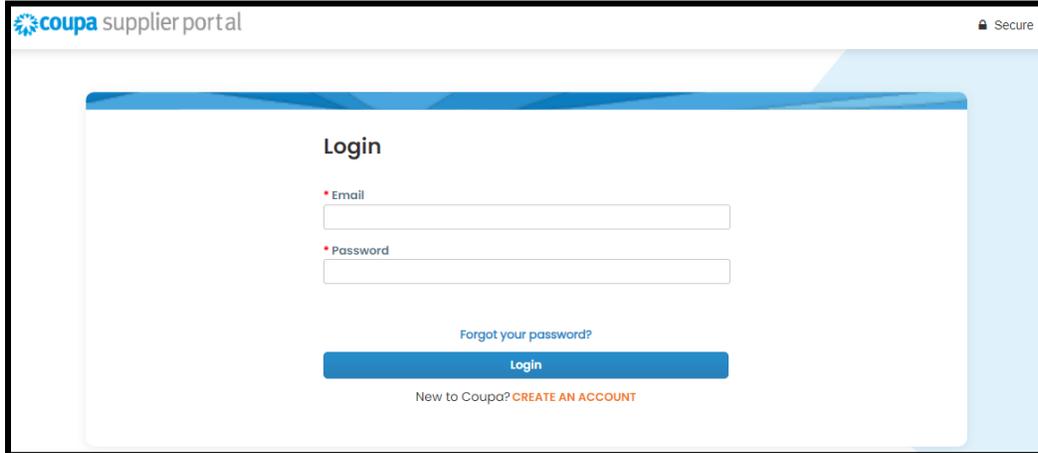


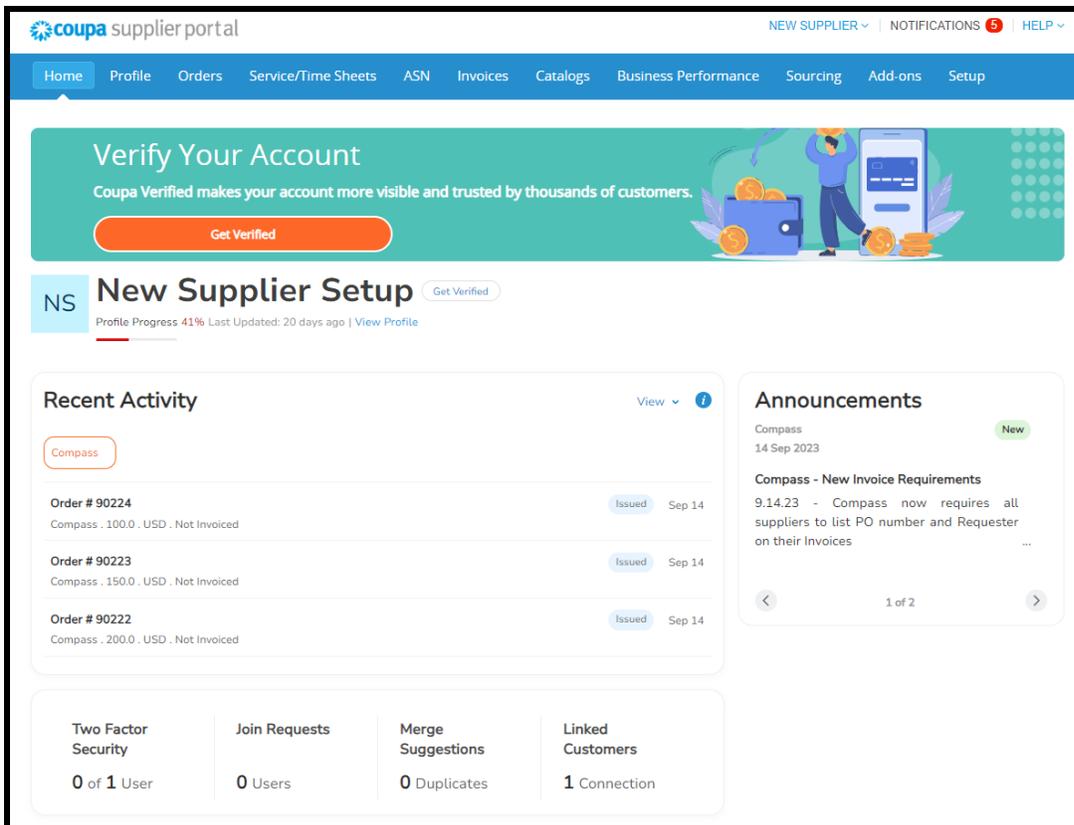
COMPASS

How to Flip a PO to an Invoice in the Coupa Supplier Portal

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.



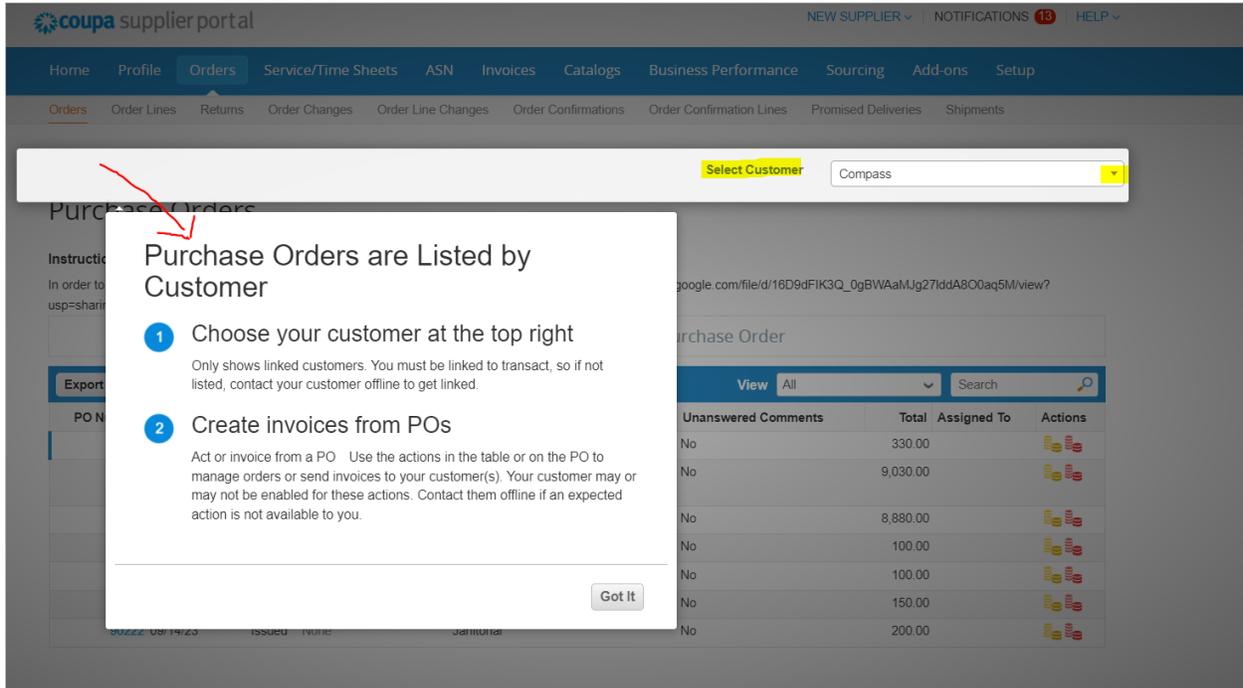
After logging in, you will see the Homepage of your CSP.



COMPASS

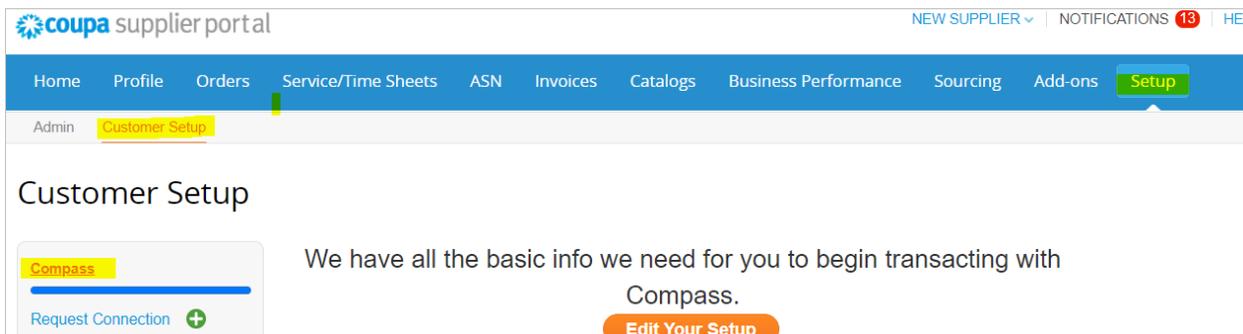
To flip a PO to an Invoice, click on the **“Orders”** tab in the blue ribbon. This is where your Customer purchase orders (PO) are located.

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



The screenshot shows the 'coupa supplier portal' interface. The 'Orders' tab is selected in the top navigation bar. A dropdown menu at the top right is set to 'Compass'. A modal window titled 'Purchase Orders are Listed by Customer' is overlaid on the page. It contains two numbered steps: 1. 'Choose your customer at the top right' with a note that only linked customers are shown. 2. 'Create invoices from POs' with instructions on how to manage orders and send invoices. A 'Got It' button is at the bottom of the modal. In the background, a table of purchase orders is visible with columns for 'Unanswered Comments', 'Total', 'Assigned To', and 'Actions'.

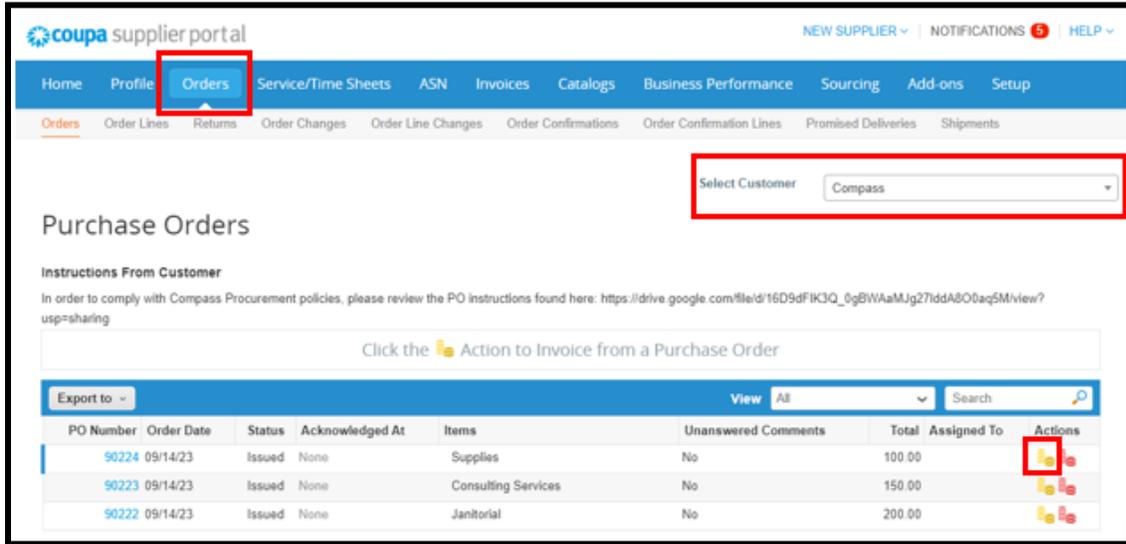
- If you are having trouble selecting a specific Customer to view their Orders you will need to speak to your CSP Admin to provision you access to that customer, via Invite User.
 - If you are the CSP Admin please make sure you are linked to Compass by going to Setup and then Customer Setup, select Compass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



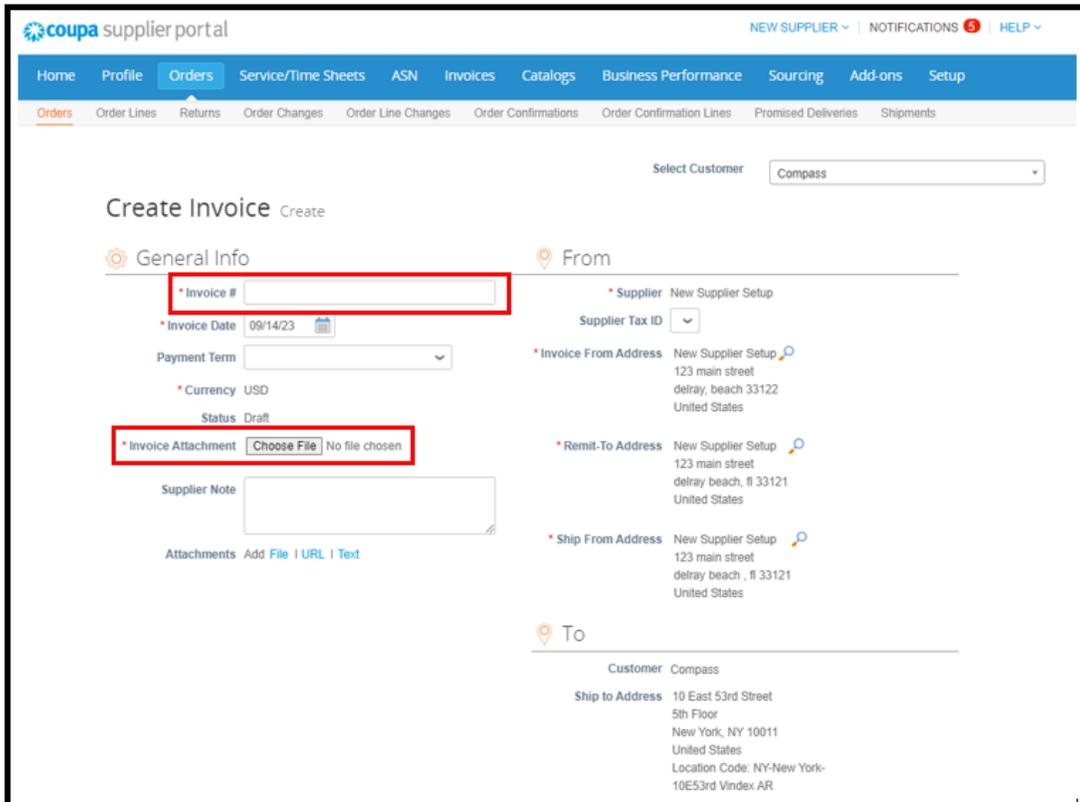
The screenshot shows the 'Customer Setup' page in the Coupa Supplier Portal. The 'Setup' tab is selected in the top navigation bar. The page title is 'Customer Setup'. On the left, there is a 'Compass' customer card with a 'Request Connection' button. The main content area contains the text: 'We have all the basic info we need for you to begin transacting with Compass.' Below this text is an 'Edit Your Setup' button.

COMPASS

To “Flip a PO into an Invoice” you can either click on the gold stack of coins or click on the PO number.



Populate the Invoice Number and provide an attachment.
Select your appropriate remit to and ensure the correct Customer is selected



COMPASS

Validate the information in the invoices Line(s) section is correct.

The screenshot shows the 'Lines' section of the COMPASS system. A red box highlights the main line item details, which include:

Type	Description	Price	
	Supplies	100.00	100.00

Below the main line item, there are additional fields:

- PO Line: 90224-1
- Service/Time Sheet Line: None
- Contract:
- Supplier Part Number:
- Billing Note:
- Billing: 69-661003-10-44

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**

The screenshot shows the invoice summary section of the COMPASS system. A red box highlights the Shipping, Handling, and Misc fields, which are used to add additional charges to the invoice. The summary includes:

Field	Value
Lines Net Total	100.00
Shipping	20
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.00
Total Tax	0.00
Net Total	120.00
Total	120.00

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

COMPASS

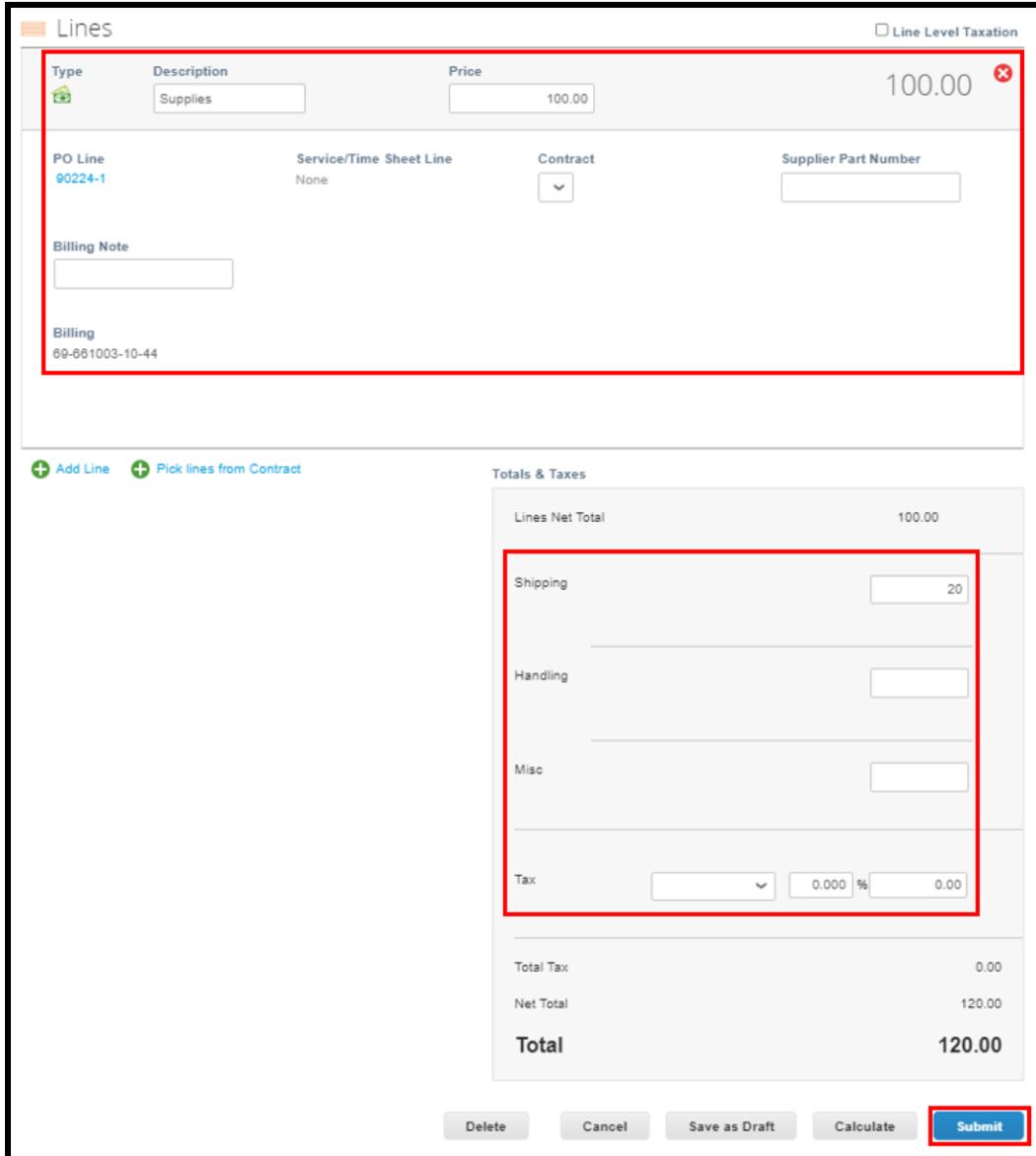
Click Submit if you are ready to send the invoice to Compass. Click Save as Draft if you need to come back to it at a later time.

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

The screenshot displays the 'Invoices' section of the Compass system. At the top right, there is a 'Select Customer' dropdown menu with 'Compass' selected. Below this, the word 'Invoices' is highlighted in yellow. Underneath, there is a section titled 'Instructions From Customer' with a link to 'Create Invoices' and a redacted URL. Below the instructions are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A navigation bar includes an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search field. Below the navigation bar is a table with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	10/10/23	Draft	90228	330.00	No		 

COMPASS



Type	Description	Price	
	Supplies	100.00	100.00 ✕

PO Line: 90224-1 Service/Time Sheet Line: None Contract: Supplier Part Number:

Billing Note:

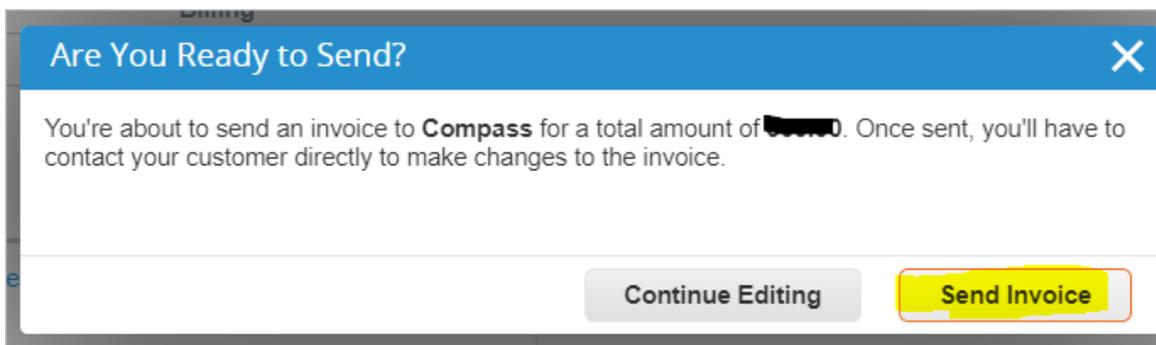
Billing: 69-661003-10-44

Totals & Taxes

Lines Net Total	100.00
Shipping	<input type="text" value="20"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.00"/>
Total Tax	0.00
Net Total	120.00
Total	120.00

Buttons: Delete, Cancel, Save as Draft, Calculate, **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.**



Are You Ready to Send? ✕

You're about to send an invoice to **Compass** for a total amount of **120.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Buttons: Continue Editing, **Send Invoice**

COMPASS

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**

Please fix the errors below

General Info

* Invoice #

* Invoice Date 10/10/23 

Payment Term

* Currency USD

Status Draft

* Invoice Attachment No file chosen
 Must be present on 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 PO backed Invoice

Invoices

New Supplier Setup invoice #12333 is pending approval 