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

Log into the Coupa Supplier Portal - <u>https://supplier.coupahost.com</u> 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.

🗱 coupa supplier portal		Secure
	Login	
	• Email	
	Password	
	Foraot your password?	
	Login	
	New to Coupa? CREATE AN ACCOUNT	

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



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

Coupa supplier port al	NEW SUPPLIER - NOTIFICATIO	
Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations O	rder Confirmation Lines Promised Deliveries Shipments	
Purchase	Select Customer Compass	•
Instruction In order to Uspesharin	google.com/file/d/16D9dFIK3Q_0gBWAaMJg27lddA8O0aq5l	1/view?
Choose your customer at the top right	irchase Order	
Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.	View All Search	Q.
PON Create invoices from POs	Unanswered Comments Total Assigned To	Actions
Act or invoice from a PO Use the actions in the table or on the PO to	No 330.00	
manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected	No 9,030.00	
action is not available to you.	No 8,880.00	
	No 100.00	
	No 100.00	
Got It	No 150.00	
SUZZZ US/14/23 ISSUEU INDRE JAINIUNAI	No 200.00	

- 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.

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Home	Profile	Orders	Service/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing	Add-ons	Setup	
Admin	Customer S	ietup									
Custo	omer S	Setup									
Compass We have all the basic info we need for you to begin transacting with											
						Compa	SS.				
Request (Connection	0				Edit Your	Setup				

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

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nstructio	ons Fro	e Ord m Custom with Compa	ers er ss Procurer	nent policies,	please rev	iew the PO	instructions	found here: htt	ps://drive.go	ogle.com/file/	d/16D9df	FIK3Q_0gl	8WAaMJ	g27idi	14800	aq5M/vi	ew?	
struction order to sp=sharin	nas ons Fro	e Ord m Custom with Compa	ers er ss Procurer	nent policies,	please rev	iew the PO	instructions	found here: htt	ps://drive.go	ogle.com/file/	d/16D9dl	FIK3Q_0gl	8WAaMJ	g27idi	14800	aq5M/vi	ew?	
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Supervisional Supervision Supe	has ons Fro o comply ng	e Ord m Custom with Compa	ers er ss Procurer	nent policies,	please rev Click	iew the PO	instructions	found here: htt Invoice fro	ps://drive.go om a Pur	ogle.com/lile/ chase Orc Viev	der Maria	FIK3Q_0gl	BWAaMJ	g27idi	1A800 Sear	aq5M/vi ch	ew?	P
Construction order to sp=sharin Export PO N	ns Fro complying to v	e Ord m Custom with Compa	ers er ss Procurer	nent policies,	please rev Click	iew the PO the 🖕 A	instructions action to	found here: htt	ps://drive.go	ogle.com/file/ chase Orr Viev Unanswered	der der All	FIK3Q_0gl	8WAaMJ Tot	g27ida V al As	Sear	aq5M/vi ch d To	ew? Actio	ns
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Populate the Invoice Number and provide an attachment. Select your appropriate remit to and ensure the correct Customer is selected

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Home	Profile	Orders	Service/Time She	ets ASN	Invoices	Catalogs	Business P	Performance	Sourcing	Add-ons	Setup	
Orders	Order Lines	Returns	Order Changes	Order Line Chang	jes Order	Confirmations	Order Confin	mation Lines	Promised Delive	eries Shipm	ients	
	Creat	te Invo	ice Create				Se	lect Customer	Compass			Ÿ
	🔅 Ger	neral Inf	o			💛 Fro	m					
		 Invoice # Invoice Date 	09/14/23			Su	• Supplier	New Supplier S	ietup			
	P	ayment Term			~	* Invoice F	rom Address	New Supplier S	Setup 🔎			
		* Currency	USD					delray, beach 3	n 33122			
		Status	Draft					United States				
	* Invoice	e Attachment Supplier Note	Choose File No	file chosen		* Remi	t-To Address	New Supplier 5 123 main stree delray beach, 1 United States	Setup 🔎 et fl 33121			
		Attachments	Add File I URL I To	ext	li	* Ship F	rom Address	New Supplier S 123 main stree delray beach , United States	Setup 🔎 tt fl 33121			
						🤗 То						
							Customer	Compass				
						Shi	p to Address	10 East 53rd S 5th Floor New York, NY ⁻ United States Location Code: 10E53rd Vinde	treet 10011 : NY-New York- x AR			

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

Type 🔁	Description Supplies	Price	100.00	100.00
PO Line 90224-1		Service/Time Sheet Line None	Contract	Supplier Part Number
Billing Not	•			
Billing 69-861003-	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**

	Lines Net Total	100.00
	Shipping	20
	Handling	
	Misc	
	Tax	✓ 0.000 % 0.00
	Total Tax	0.00
	Net Total	120.00
	Total	120.00
Delet	e Cancel	Save as Draft Calculate Submit

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

							Select Customer	Comp	bass		
Invoices											
Instructions Fro	om Customer e timely invoice protection	ocessing, please revi	iew our i	nvoicing gu	uidelines by copying and	pasting	g the link below into the	e URL ar	nd navigating to		
Create Invoice	from PO C	reate Invoice from (Contract	Cre	eate Blank Invoice	Crea	te Credit Note				
Export to 🗸						View	All	~	Search	P	
Invoice #	Created Date	Status	PO #	Total	Unanswered Comme	nts	Dispute Reason			Actions	
None	10/10/23	Draft	90228	330.00	No					<mark>/</mark> 8	

Lines					Line Level Taxatio
Type	Description Supplies	Pri	ice 100.00		100.00
PO Line 90224-1		Service/Time Sheet Line None	Contract	Supplier P	art Number
Billing Not	e				
Billing					
69-661003	-10-44				
Add Line	Pick lines from Co	ontract	Totals & Tayos		
	Ū		Lines Net Total		100.00
			Shipping		20
			Handling		
			Misc		
			Misc		
			Misc Tax	♥ 0.000	96 0.00
			Misc Tax Total Tax Net Total	• 0.000	96 0.00
			Misc Tax Total Tax Net Total Total	• 0.000	0.00 96 120.00 120.00

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 contact your customer directly to make changes to the invoice.	. Once sent, you'll have to
e	e Continue Ed	iting Send Invoice

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	Choose File 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

In	nvoices	
N	New Supplier Setup invoice #12333 is pending approval	×