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.
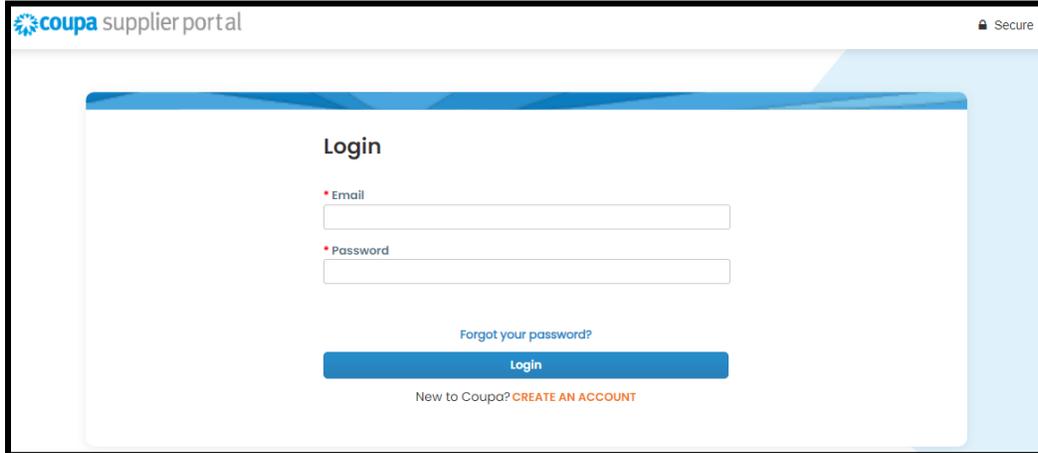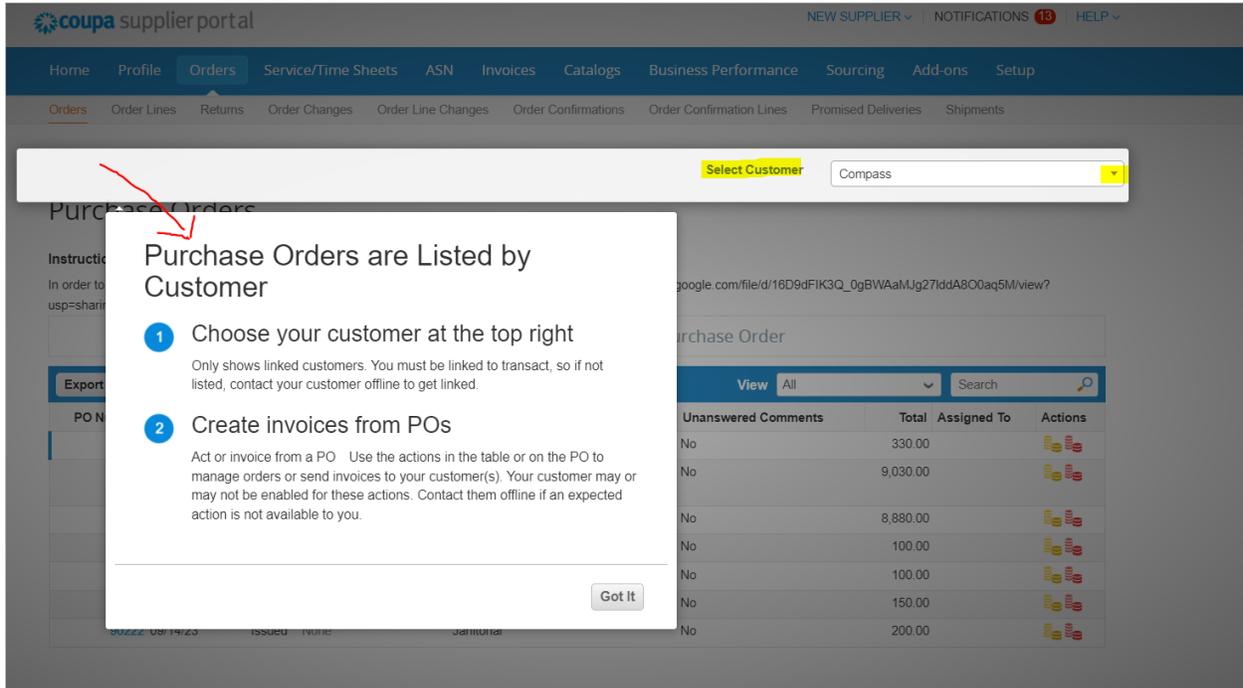

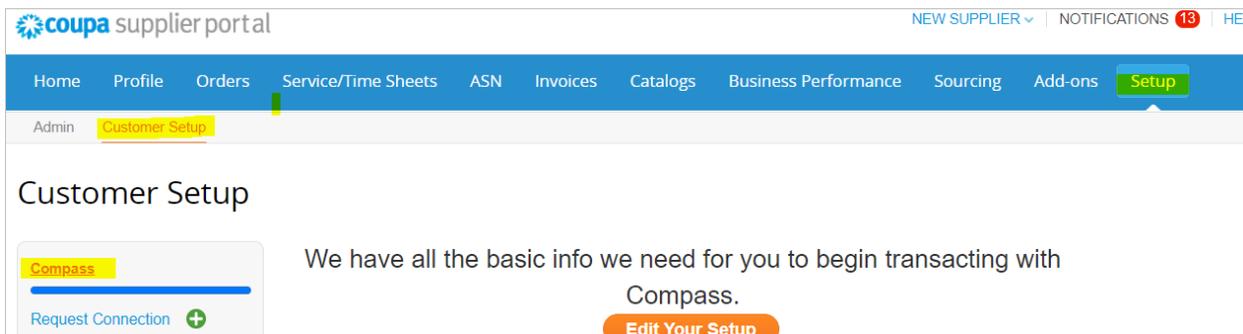After logging in, you will see the Homepage of your CSP.
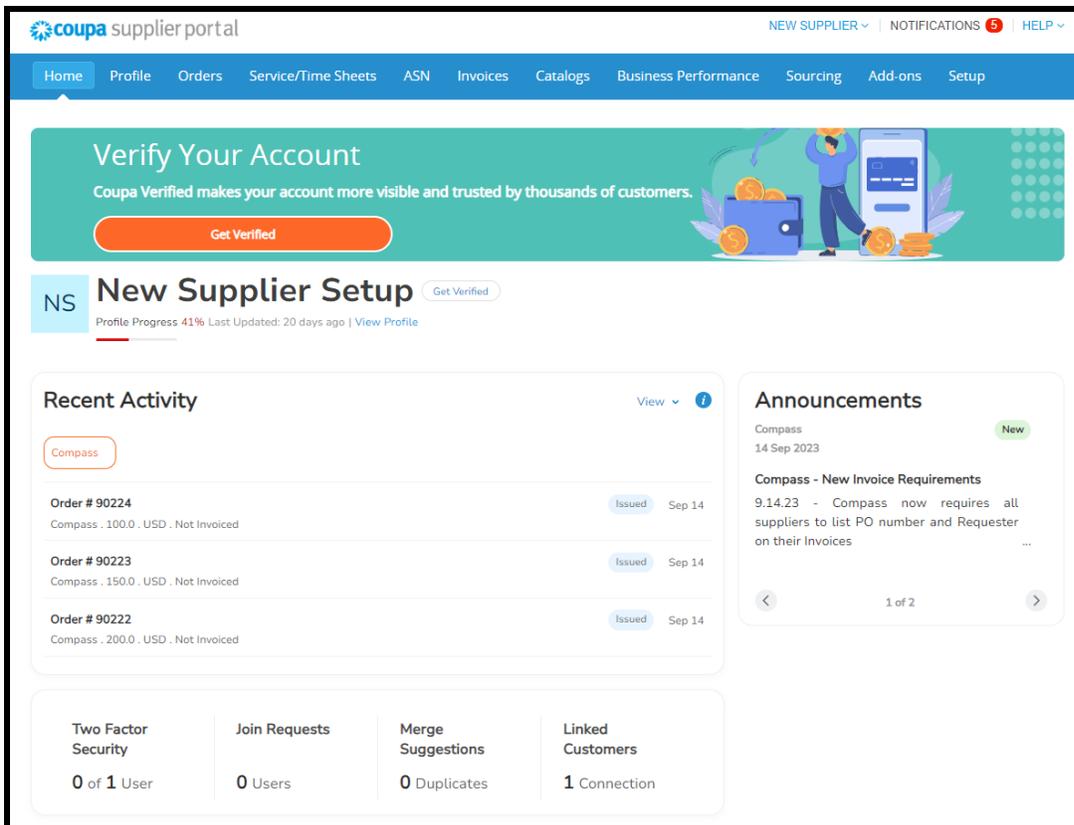
To flip a PO to an Invoice, click on the "**Orders**" tab in the blue ribbon. This is where your Customer purchase orders (PO) are located.

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


- 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.
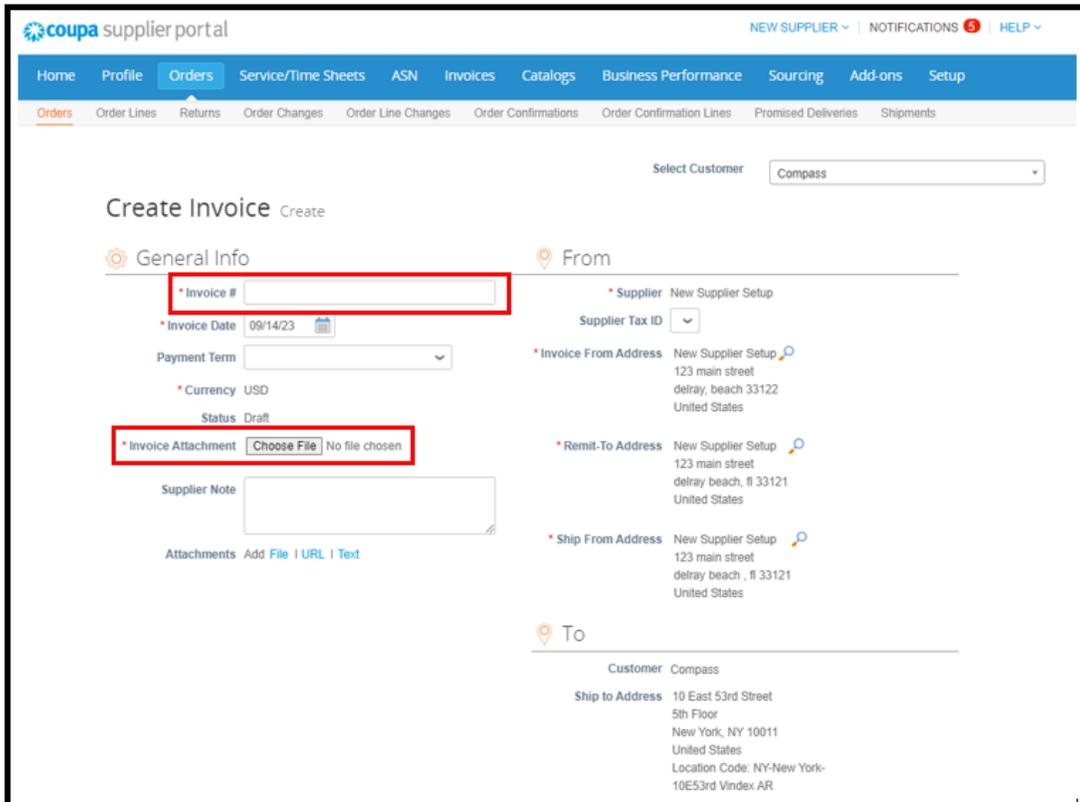
COMPASS

To "Flip a PO into an Invoice" you can either click on the gold stack of coins or click on the PO number.
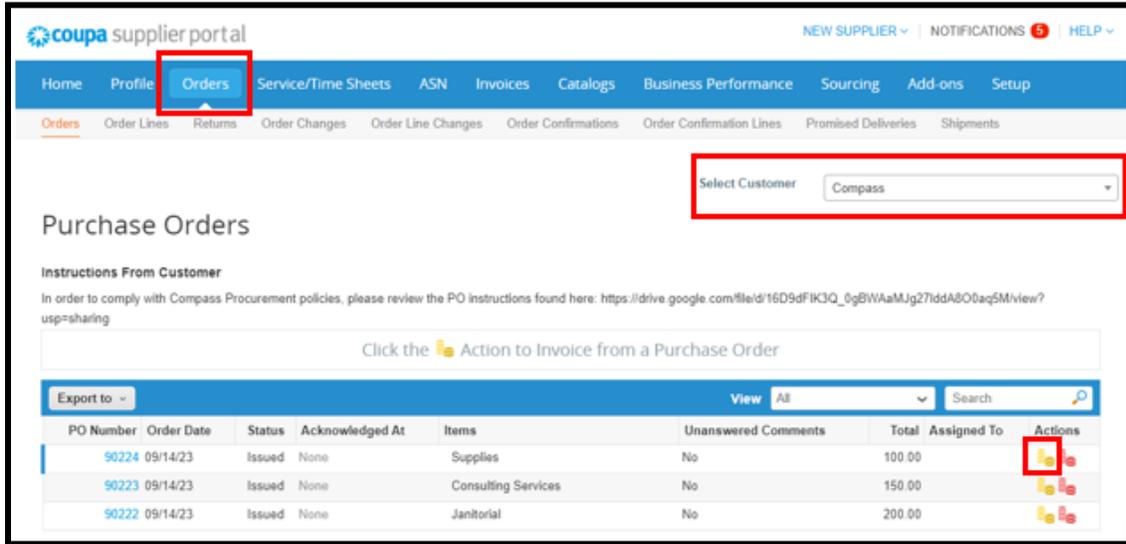
Populate the Invoice Number and provide an attachment.
Select your appropriate remit to and ensure the correct Customer is selected

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

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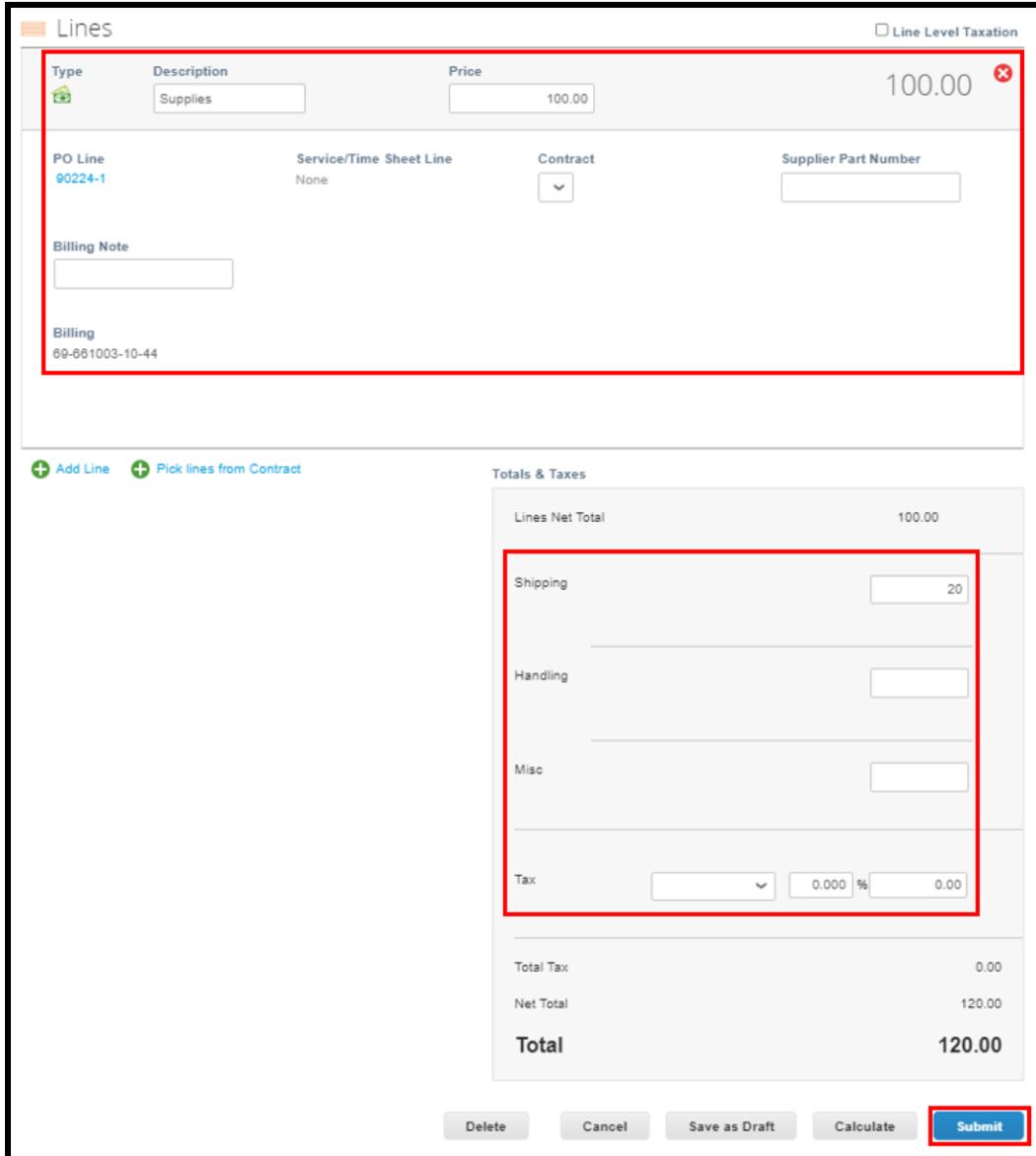
Click Submit if you are ready to send the invoice to Compass. Click Save as Draft if you need to come back to it at a later time.

       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   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

Create Invoices ℹ️

| 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.**
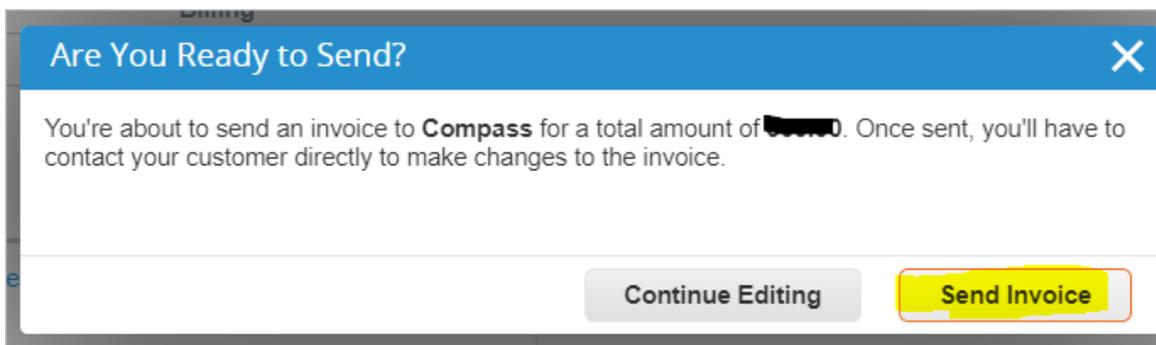
Are You Ready to Send?   ✕

You're about to send an invoice to **Compass** for a total amount of ▓▓▓▓0. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing   **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

Invoices

New Supplier Setup invoice #12333 is pending approval ✕