PO Invoice Creation – Training Guide

Introduction

Creating a Purchase Order (PO) invoice in Coupa involves several steps which is mentioned below.

1. Log in to Coupa Supplier Portal: Access the Coupa Supplier Portal using the link received in the email notification or use your credentials provided during account creation.

2. Select the Purchase Order: Identify the purchase order for which you want to create an invoice. Coupa will requires you to associate an invoice with a specific purchase order.

3. Fill in Invoice Details: Enter relevant invoice details, including the invoice number, date, and any other required information. Ensure that the details match the corresponding purchase order.

5. Verify Totals and Amounts: Double-check all totals and amounts to ensure accuracy. Verify that they align with the terms and conditions specified in the purchase order.

6. Review and Submit: Review the entire invoice for accuracy. Once satisfied, submit the invoice through the Coupa Supplier Portal.

7. Track Invoice Status: After submission, you can track the status of your invoice within the portal by clicking "Invoice" Tab.

Login to Coupa Supplier Portal using Email Notification

1. Click the "View Order" button to access the CSP and view the Purchase Order

The Supplier will receive an email notification with PO details

Select the Purchase Order (PO)

2. Navigate to Homepage-> Orders to view the Purchase Orders

Click to Create a PO Invoice

3. Click the icon highlighted in yellow under "Actions" to create a PO Invoice

Fill in the Invoice Details

4. Fill in the mandatory Header fields – Invoice # and Invoice attachment (other details are prepopulated from the supplier profile)

Create Invoice Create

⚙ General Info

* Invoice #	
* Invoice Date	01/02/2024 📅
Payment Term	As per contract payment terms
* Currency	QAR ⌄
Status	Draft
* Image Scan	Choose File No file chosen
Supplier Note	

Attachments Add File | URL | Text

📍 From

* Supplier	Qatar Computer Services
Supplier Tax ID	4567898765 ⌄
* Invoice-From Address	Qatar Computer Services 🔍 Old Town 1000 Doha Qatar
* Remit-To Address	Qatar Computer Services 🔍 Old Town 1000 Doha Qatar
Bank Name:	First National Bank
Beneficiary Name:	Qatar Computer Services
Bank Account Number:	*****************3212
IBAN:	******5678
SWIFT Code:	****YG65
Bank Code:	****
* Ship-From Address	Qatar Computer Services 🔍 Old Town 1000 Doha Qatar

📍 To

Customer	Qatar National Bank
Receiving Bank Instructions	

Fill in the Invoice Details

5. Verify the Line Level information and Itemize the products or services being invoiced

Verify Totals and Amounts

6. For the Net Total to be calculated, click "Calculate".

7. Then click "Submit".

Enter comments in the description field to notify the buyer and Click "Add Comment"

Thank you