

COUPA TRAINING

Coupa Supplier Portal (CSP) – How to
Raise an Invoice

January 2022

DRIVEN BY TRUST



CREATING AN INVOICE – PO FLIP

1. Select the Inchcape Entity/ Brand you need to raise an invoice against. You do this by selecting from the “Select Customer” Drop Down Box.
2. Find from the list the Purchase Order you wish to invoice against
3. Click on the Gold Coins Icon – this takes you to the create an Invoice Page (see page 3)
4. The Red Coins Icon is for raising a credit note.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, there are user details: 'DAVE', 'NOTIFICATIONS 3', and 'HELP'. Below the navigation bar, there are tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Under the 'Orders' tab, there are sub-tabs for 'Orders', 'Order Lines', 'Order Changes', and 'Order Line Changes'. A 'Select Customer' dropdown menu is set to 'Inchcape', with a 'Configure PO Delivery' button next to it. Below this, the 'Purchase Orders' section is displayed. A message says 'Click the [Gold Coins Icon] Action to Invoice from a Purchase Order'. There is a 'View' dropdown set to 'All' and a search box. A table of purchase orders is shown with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The first row is highlighted with a blue background and has a yellow '2' next to it. The 'Actions' column for this row contains a yellow 'Gold Coins' icon and a red 'Red Coins' icon, with a yellow '3' next to it. A blue arrow points from the 'Select Customer' dropdown to the yellow 'Gold Coins' icon.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
GRP00002803	09/09/19	Issued	09/09/19	100 Days of Accounting Services - Coupa Project	No	100,000.00 GBP	[Gold Coins] [Red Coins]
GRP00002802	09/09/19	Issued	None	10 Days of Accounting Services	Yes	10,000.00 GBP	[Gold Coins] [Red Coins]

THIS IS THE CREATE AN INVOICE PAGE

Section 1

1. Add an Invoice Number
2. Change the Invoice Date – **Please ensure this is changed to the the Tax date of the invoice, do not leave as the submission date as this will cause delay's to your payments**

Create Invoice Create

General Info

* Invoice # **1**

* Invoice Date **2**

Payment Term Z060_Payment due 60 days from the date of invoice

Date of Supply

* Currency

Delivery Number

Status Draft

Image Scan

Supplier Note

Attachments | [URL](#) | [Text](#)

From

* Supplier GRP-IMS-1002616

* Supplier VAT ID

* Invoice From Address
77 North Road Accountancy
Bristol
BS16 5LU
United Kingdom

* Remit-To Address
77 North Road
Bristol
BS16 5LU
United Kingdom

* Ship From Address
77 North Road
Bristol
BS16 5LU
United Kingdom

Section 2

1. Check the quantity and net value is correct
2. Select your VAT rate
3. Click Calculate to work out the VAT element of the Invoice
4. Click Submit - Invoice Completed

Lines

Type	Description	Qty	UOM	Price	
1	Accounting Services	100.0	Days	1,000.00	100,000.00

PO Line [GRP0002603-1](#) Contract Supplier Part Number Tax Code Default None

Billing K-1001021937-800001

Taxes

VAT Rate	VAT Amount	Tax Reference
2 <input type="text"/>	<input type="text"/>	<input type="text"/>

Totals & Taxes

Lines Net Total	100,000.00
Lines VAT Totals	0
<hr/>	
Total VAT	0.00
Net Total	100,000.00
Gross Total	100,000.00

3 **4**

COUPA TRAINING

Useful Contacts

Invoice/ Payment Queries - Enquiries.AccountsPayable@inchcape.co.uk

Supplier Statements - SupplierStatements@inchcape.co.uk

Inchcape Coupa Queries - GlobalCoupa.Support@Inchcape.com

You can also visit <https://www.inchcape.co.uk/suppliers/>

Where you will find additional guides and support.

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