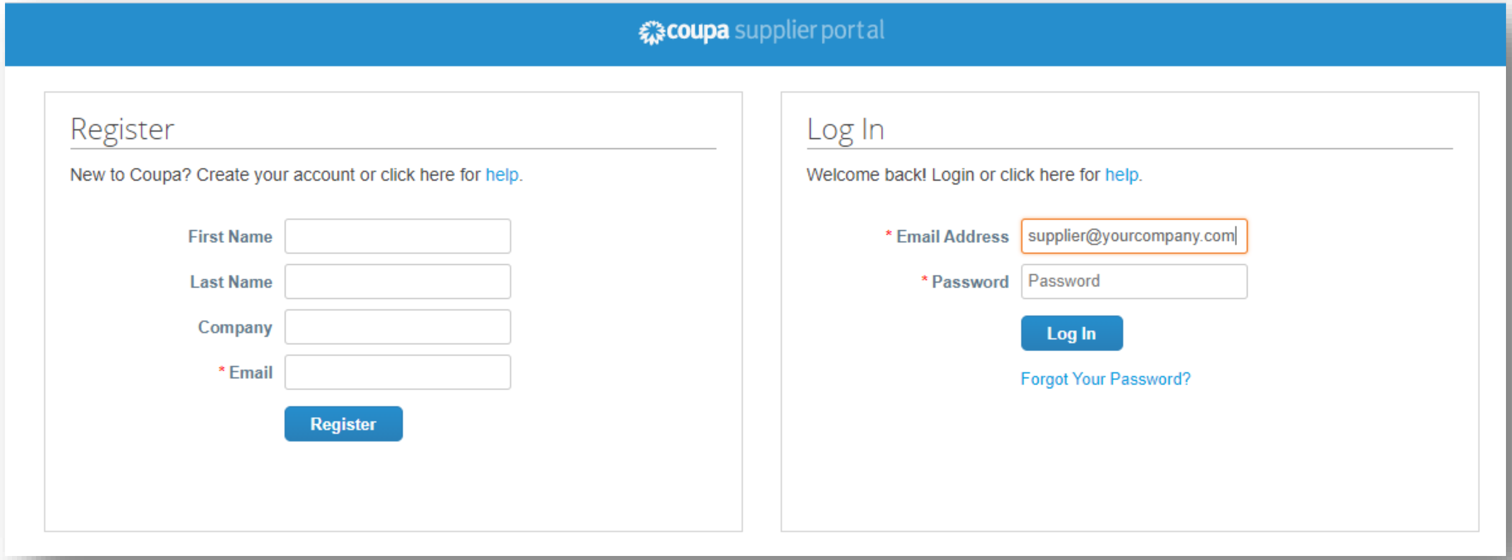
Coupa Supplier Portal:

Invoicing – Creating an Invoice Against a Contract

11/3/2020

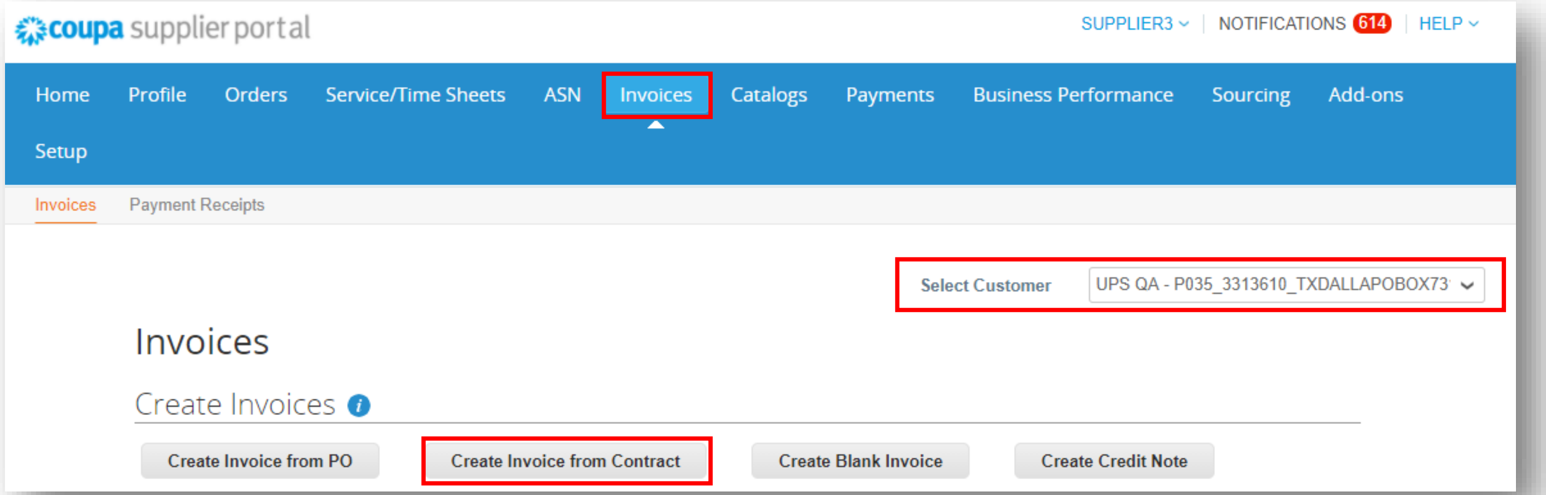
Creating an Invoice Against a Contract

- Log into the Coupa Supplier Portal (CSP) at: https://supplier.coupahost.com/ using the previously established email address and password.
- For best results, Google Chrome is the recommended web browser.



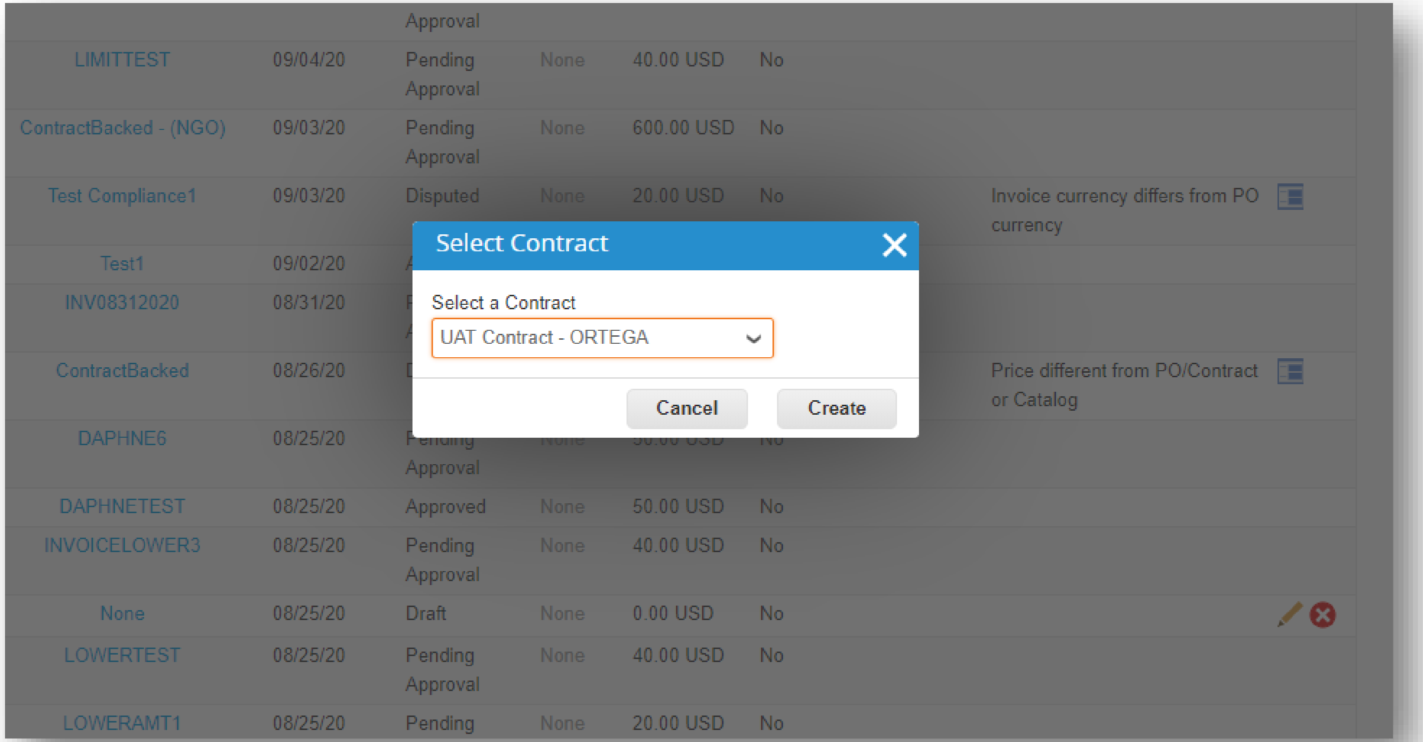
Creating an Invoice Against a Contract

- Click on the *Invoices* tab at the top of the page.
- From the *Select Customer* dropdown menu, select the appropriate customer (UPS).
- Click *Create Invoice from Contract*.



Creating an Invoice Against a Contract

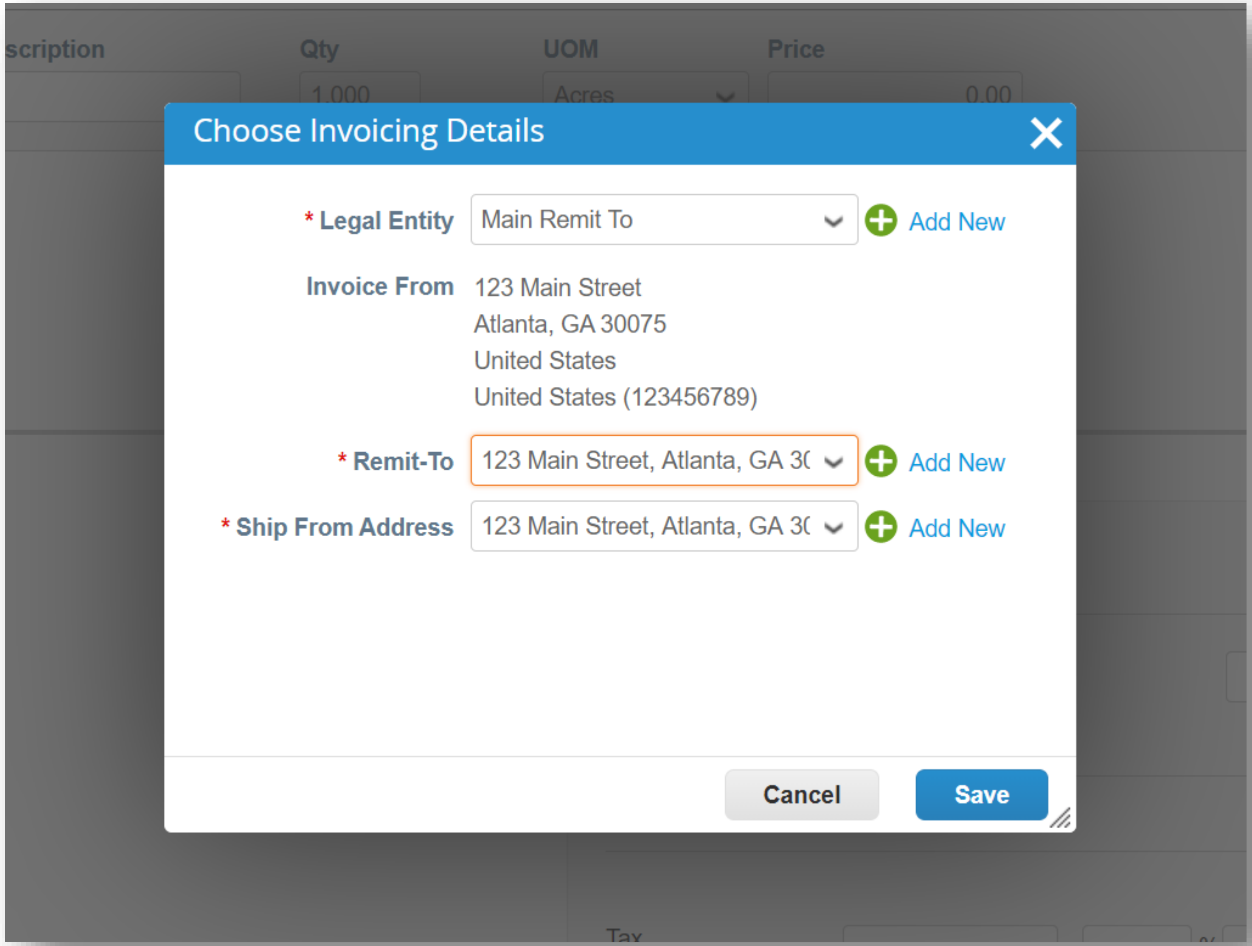
- On the *Select Contract* pop up, make a selection from the dropdown menu.
- Click *Create*.



Creating an Invoice Against a Contract

- Complete each required field on the *Choose Invoicing Details* screen, by clicking *Add New* and entering the information or selecting previously created information from the dropdown menus.

- Click *Save*.

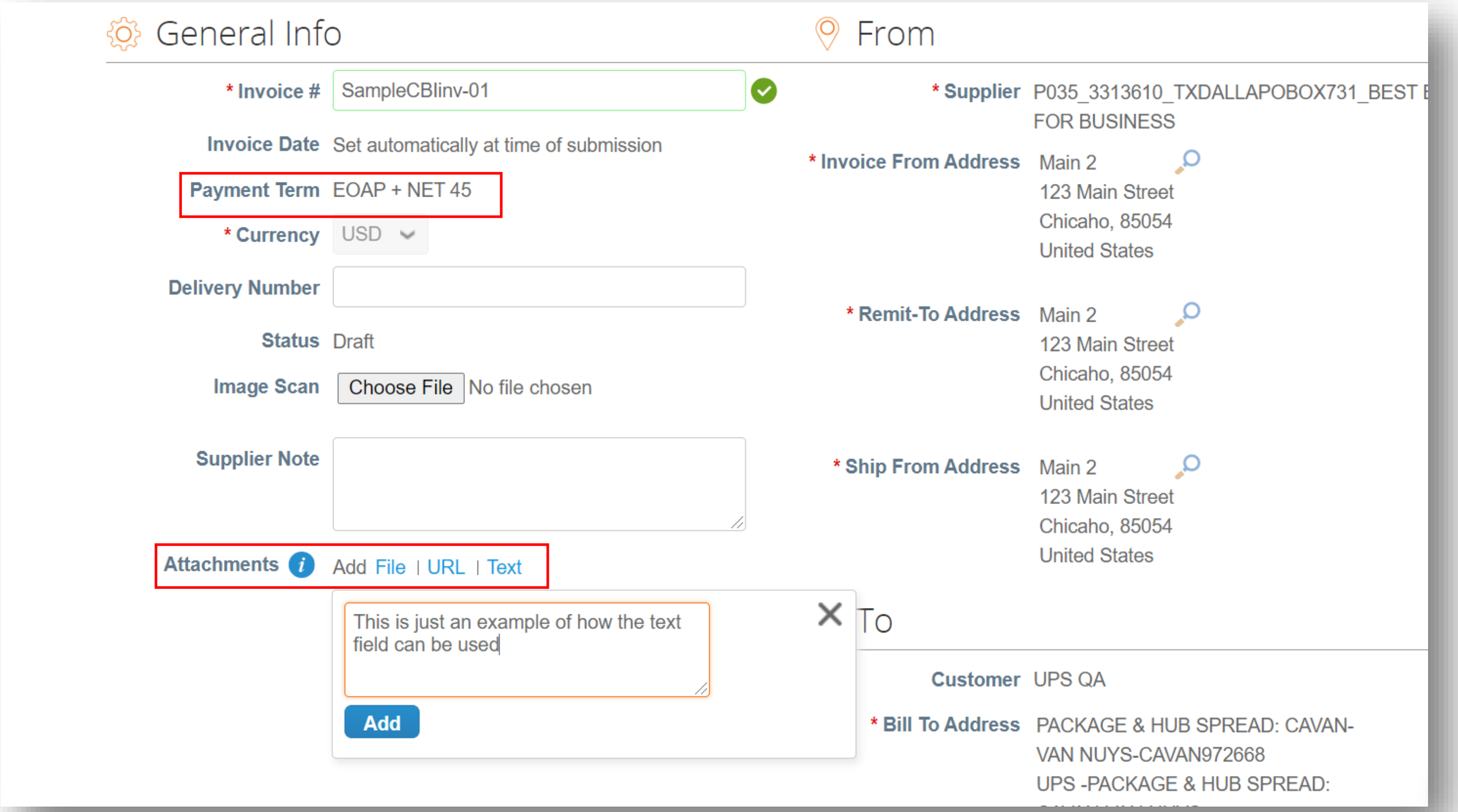


Creating an Invoice Against a Contract

- In the *General Info* section, enter a unique invoice number in the *Invoice #* field (50 character limit).
- Verify the *Payment Term* field is defaulted to the contractually agreed upon terms.
- Suppliers can add comments in the *Supplier Note* or *Attachments* fields. Supporting documentation can also be added in the *Attachments* field.

  Note: If there are *Miscellaneous* line items, supporting documentation is required.

- Click *Add*.



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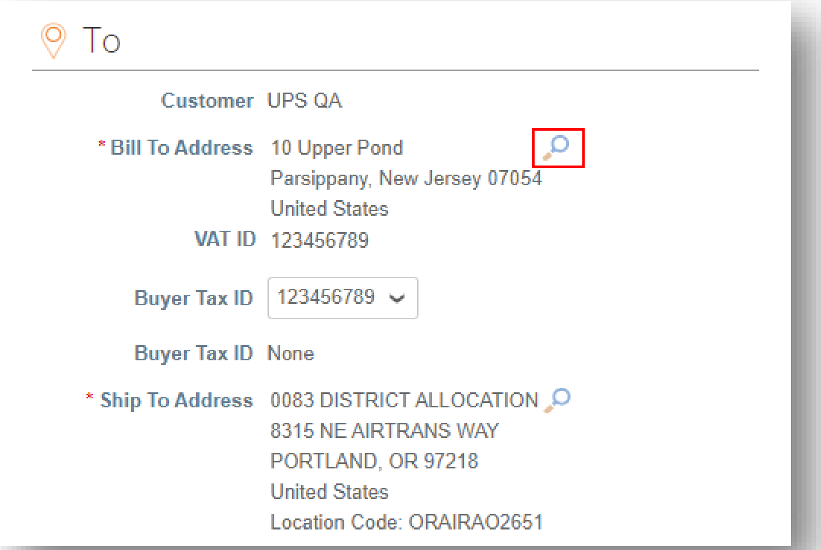
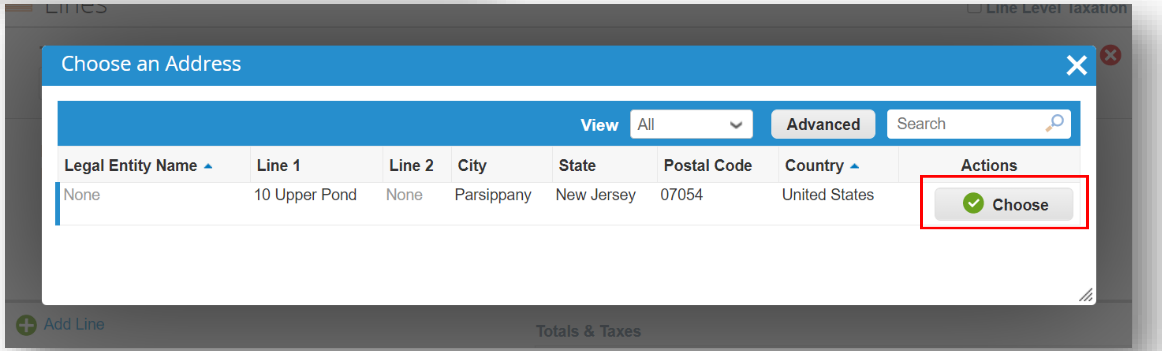
- Scroll down to the *To* section and click the magnifying glass next to the *Bill To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose.*





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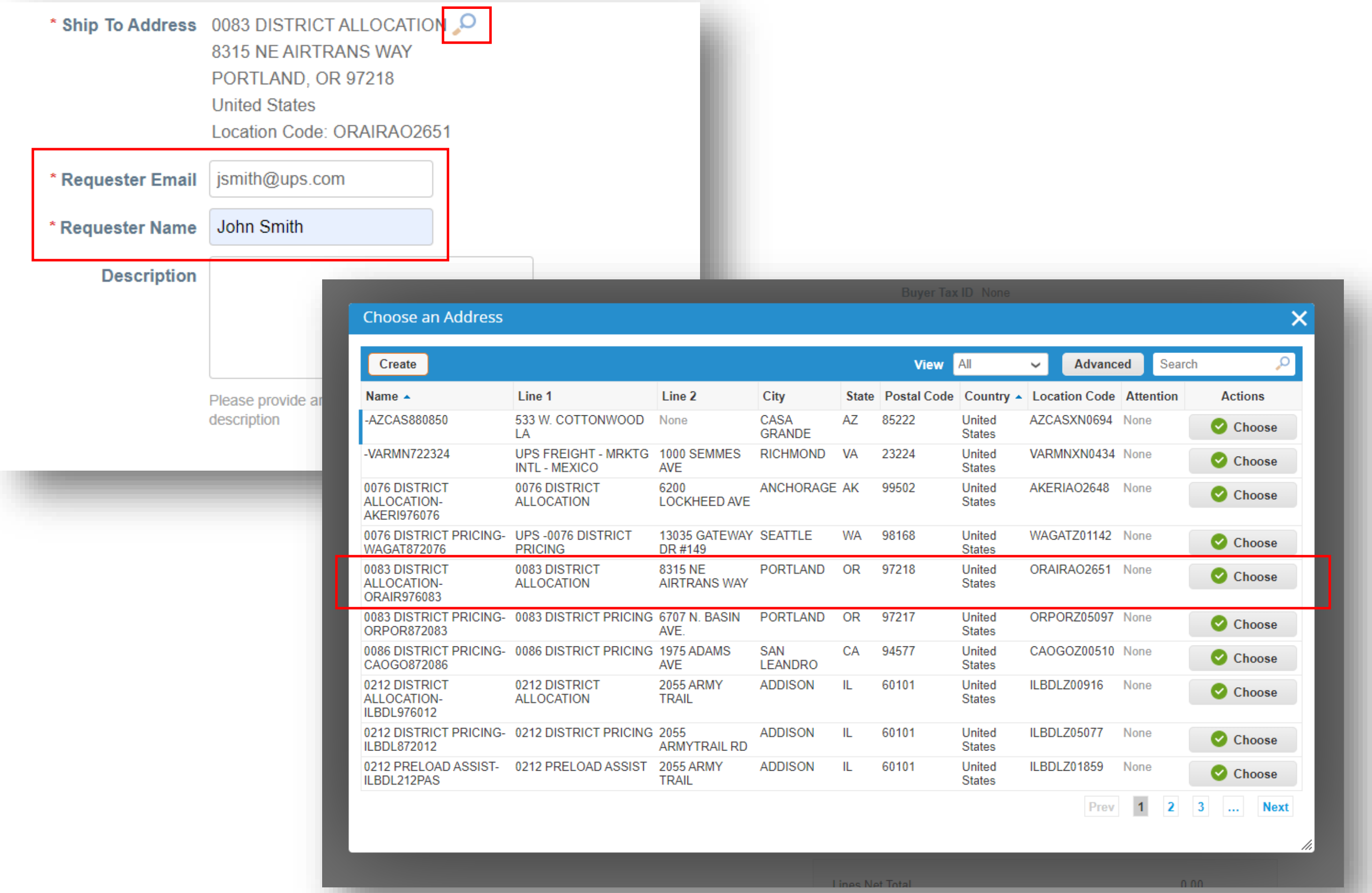
- Click the magnifying glass next to *Ship To Address*.
- On the *Choose an Address* pop up, find the appropriate address and click *Choose.*
- Complete the *Requester Email* and *Requester Name* fields.

  Note: The *Requester* is the UPS contact who requested the good(s) or service(s).



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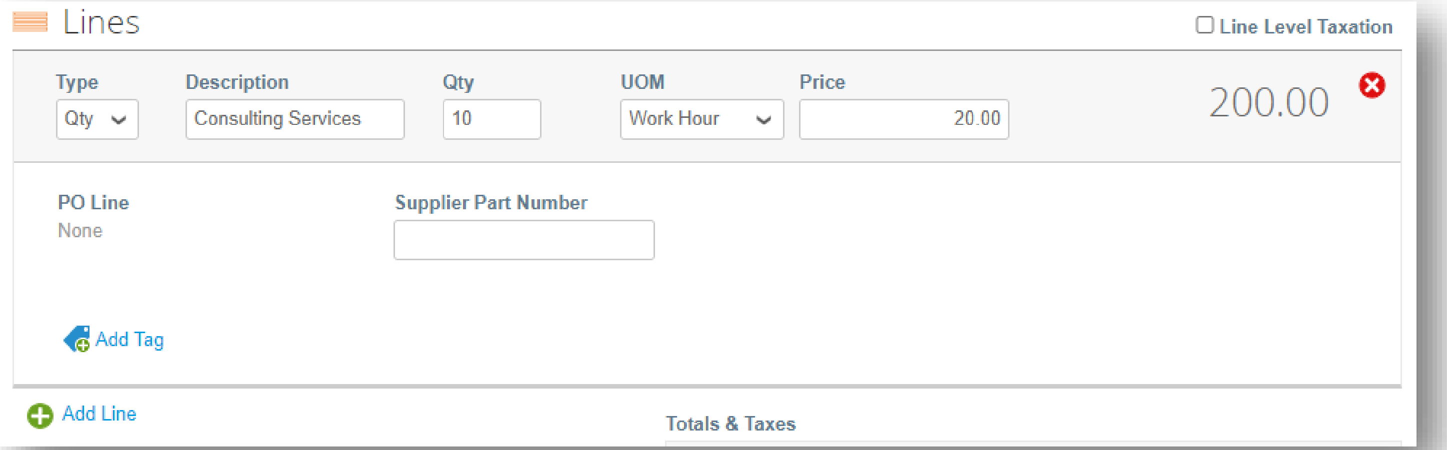
- Scroll down to the *Lines* section. Select the *Type* from the dropdown menu.
- Enter a description, quantity, unit of measure (UOM), and price in the corresponding fields.
- To add line items to the invoice, click *Add Line* and complete necessary fields.



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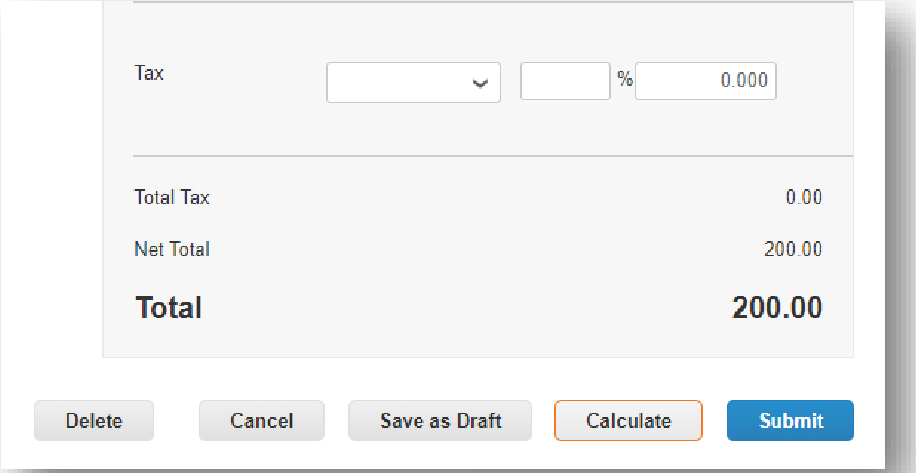
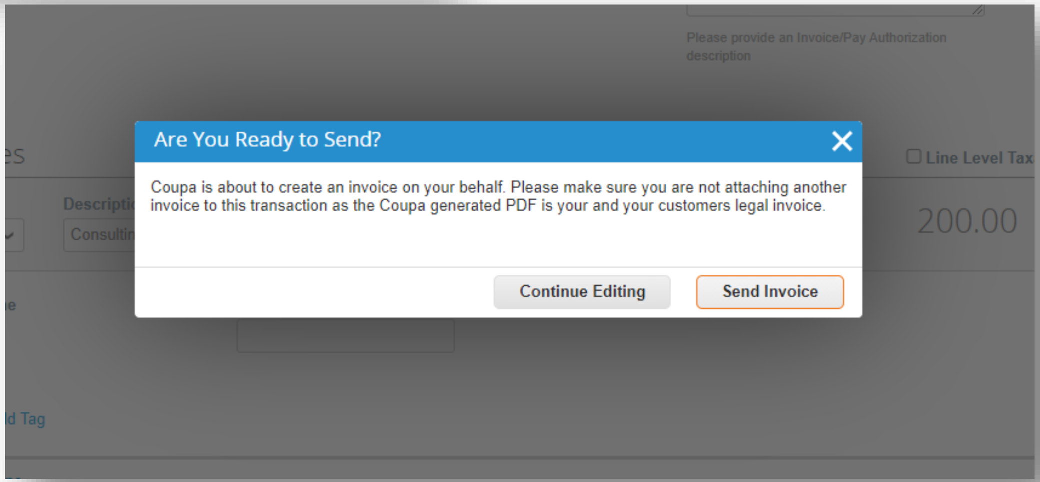
- Scroll down and click the *Calculate* button to validate the total amount.
- Once the total is validated and all required fields are completed, click the *Submit* button.
- Click *Send Invoice* on the *Are You Ready to Send* popup.





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- On the *Invoices* page, the newly created invoice should have a status of *Processing*.
- Users will be notified of invoice status updates via online, email, and/or SMS (text) messaging, depending on how notifications were set up.
- Got questions? Need help? Email supplyline@ups.com for assistance.

Create Invoices

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	10/01/20	Draft	None	0.00 USD	No		
ContractBacked - Martindale	10/01/20	Processing	None	200.00 USD	No		
Testpendingaction2	09/30/20	Pending Approval	None	2,370.50 USD	No		

THANK YOU