

CREATE AN INVOICE IN COUPA SUPPLIER PORTAL

Coupa Supplier Portal (CSP) – User Guide

Version 1.0 (August 2023)

1. General Information

In the COUPA Supplier Portal you can create an invoice based on a purchase order.

The use of the CSP for invoicing aims at increasing the automation of invoice processing, speeding up process costs and time, and creating invoices exclusively based on your approved data and your explicit consent.

The invoice created in the CSP is considered the leading invoice. Your invoice generated in your own system is welcome to be attached as an attachment to any CSP invoice. However, the CSP invoice is always relevant for tax purposes.

Invoices can be submitted through the following channels:

- **COUPA Supplier Portal**
 - o Convenient and user-friendly access to all your invoices, status overview and transparency of your invoices, free registration on CSP
 - o We recommend this channel for suppliers who send us regular invoices
- **SAN (Supplier Actionable Notifications)**
 - o Invoice generation directly from the PO email, no registration on CSP required
 - o We recommend this channel for suppliers who send us invoices sporadically and do not want to register on the CSP
- **Automatic interface (for example cXML)**
 - o Direct electronic connection that enables automatic electronic exchange of invoice data
 - o We recommend this channel for suppliers who send more than 50 invoices per month

In this document they are explained the first two channels.

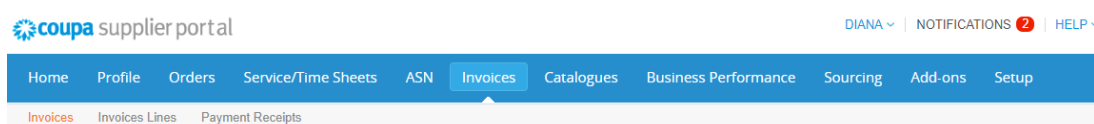
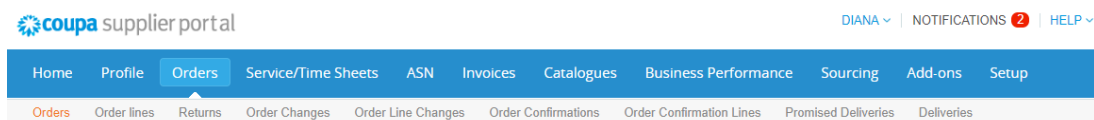
If you are interested in an automatic interface connection, please contact your Harbour Energy representative.

Your advantages when using the above channels are:

- Guaranteed transmission of the invoice within seconds
- Higher process reliability for invoicing
- Erroneous invoices can be minimized (e.g. pre-audit of tax information)
- Legally compliant documentation (digitally signed PDF document)
- Transparency of current invoice status on CSP
- Electronic communication channel for billing questions
- Invoicing exclusively on the basis of your communicated data and your explicit consent

2. COUPA Supplier Portal - Create an invoice

You can create an invoice either from **Orders** Tab on the main menu or, from the **Invoices** tab.



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Locate your Purchase Order in the table and select the create invoice (📄) icon in the Actions column or open the respective purchase order and tick the button **“Create Invoice”**.

Purchase Order #3050

Status: Issued - Sent via Email

Order Date: 15/01/17
 Revision Date: 15/01/17
 Requester: FredName Lastname
 Email: FredName.Lastname@coupa.com
 Payment Terms: Net 30 [Accelerate Payment](#)
 Attachments: None
 Acknowledged: ☐

Shipping

Ship-To Address: 1905 South Grant Street
 San Mateo, CA 94402
 United States
 Attn: FredName Lastname
 Terms: None

Lines

Advanced [Create](#) Sort By Line Number: 0 - 9

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Purple Spiral Notebook	200	Each	0.50	100.00	0.00

Part Number: None

Per page: 15 45 90

Total: 100.00 USD

[Create Invoice](#) [Create Service/Time Sheets](#) [Request Change](#) [Save](#) [Print View](#)

Comments

[Add Comment](#)

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A new window will open and the following information will be displayed:

coupa supplier portal FRANCISCA NOTIFICATIONS [HELP](#)

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer: Wintershall Dea

Create Invoice Create

General Info **From**

* Invoice #:
 Invoice Date: Set automatically at time of submission
 Payment Term: 1433 - Within 14 days 3 % cash discount, 30 days due
 Date of Supply: 04/18/23
 * Currency: EUR
 Delivery Number:
 Status: Draft
 Shipping Term: DDP
 Image Scan: [Choose file](#) No file chosen
 Supplier Note:
 Attachments: [Add File](#) | [URL](#) | [Text](#)
 Cash Accounting Scheme:
 Margin Scheme:
 * Exchange Rate:

* Supplier: 1004548-Power Station GmbH
 * Supplier VAT ID: GB258129000
 * Invoice From Address: DMG Consulting Ltd
 456F
 110 Gaddesden Crescent
 Watlington Gate
 Milton Keynes
 Other
 MK7 7SQ
 United Kingdom
 Ltd
 * Remit To Address: DMG Consulting Ltd
 456F
 110 Gaddesden Crescent
 Watlington Gate
 Milton Keynes
 Other
 MK7 7SQ
 United Kingdom
 * Ship From Address: DMG Consulting Ltd
 456F
 110 Gaddesden Crescent
 Watlington Gate
 Milton Keynes
 Other
 MK7 7SQ
 United Kingdom

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General Info

Invoice Number: Needs to be a unique number. Duplicate are not allowed.

Invoice Date: The date of your invoice should be the date you create your invoice in your own system. The dates should be the same to ensure legal tax requirements.

Payment Terms: Is already defined based on the purchase order; field cannot be changed.

Date of Supply: Should be the date the service was completed.

Currency: Is already defined based on the purchase order; field cannot be changed.

Delivery Number: Field can be filled with the delivery note number for material deliveries.

Status: Status of an invoice, is automatically defined by the system.

Status	Description
Draft	The invoice has been created, but it has not been submitted to Harbour Energy yet. You can still continue to edit your invoice
Pending Approval	The invoice is currently under review by Harbour Energy
Processing	The invoice is being processed by the Accounts Payable (AP) Department and should be paid soon
Approved	The invoice has been accepted for payment and will be paid based on the agreed payment terms
Disputed	Invoices with a disputed status with information that the AP Department does not agree to, needs clarification on, or finds incorrect. You can create a partial or a full credit note.
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You will not be able to edit this invoice, therefore you will need to create a new invoice. You can set notification preferences for the abandoned invoices.
Voided	Something is wrong with the invoice. Contact your usual Harbour Energy representative to discuss how to proceed with this invoice.
Paid	Your invoice has been paid.

Shipping Terms: Is already defined based on the purchase order; field can be changed.

Image Scan: You can use the field to attach your own created invoice from your system. The file will then be sent to the customer as an attachment to the CSP invoice. The following types are accepted: PNG, GIF, JPG, JPEG, PJPEG, TIFF or PDF. An attachment can be up to 100 MB in size. However, for performance reasons, you should limit the size of the attachment to 16 MB.


Supplier Note: You can enter notes related to your invoice, if necessary.

Attachments: You can also attach files, URLs, and text to an invoice for example your time sheets.



Invoice From Address / Remit-To Address / Ship From Address:

The invoice fields will be pre-populated based on the information in the Purchase Order and your legal entity.

You can add a new or choose alternative (existing) invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address by selecting the magnifying glass () icon alongside the relevant address.



Enter the appropriate quantity or gross value per item that you want to invoice.

In case of a call-off from a catalog, the price cannot be changed. This requires a change in the catalog and in the purchase order.

If you have any questions about this, please feel free to contact your purchasing contact or use the comment field at the bottom of this page.

The applicable tax rates are determined by the tax code on their invoice. Please select the appropriate one.

Totals & Taxes

Lines Net Total	1,200.00
Lines VAT Totals	0.00

Shipping

VAT

▼

0.000

Tax Reference

Enter a tax reason description.

Misc

VAT

▼

0.000

Tax Reference

Enter a tax reason description.

Total VAT	0.00 GBP	0.00 EUR
Net Total	0.00 GBP	1,200.00 EUR
Gross Total	0.00 GBP	1,200.00 EUR

Delete

Cancel

Save as Draft

Calculate

Submit

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You can add invoice lines to your invoice.

Please add only positions that are available for you in existing orders. This can be done via the button "[Pick lines from PO](#)".

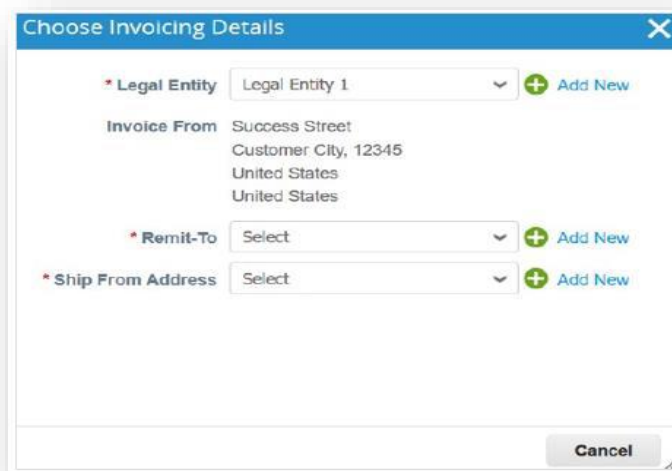
You can additionally enter tax rates or agreed costs for shipping, handling and other costs under the positions. You can use the "[Shipping](#)" field to account for individual transportation costs that were not part of the order or are available as individual lines.

As soon as you have finished entering your data, you can use "[Calculate](#)" to calculate the total gross amount including the tax values.

Click the "[Submit](#)" button to generate the CSP invoice and send it to Harbour Energy for approval.

3. Create invoice via the SAN functionality

With Supplier Actionable Notifications (SAN) you can create an invoice directly from the email notification and submit it to Harbour Energy. To do this, please click the ["Create Invoice"](#) button in the email notification.



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You will then be prompted to select invoicing details.

If you have not created a legal entity in CSP, you must add a legal entity by clicking on the link "Add address" or on the icon (+).

For more details on how to create a legal entity in CSP, please refer to the Quick Guide "04_WHD_Set up legal entity in CSP_EN".

If you have already created a company it is selectable.

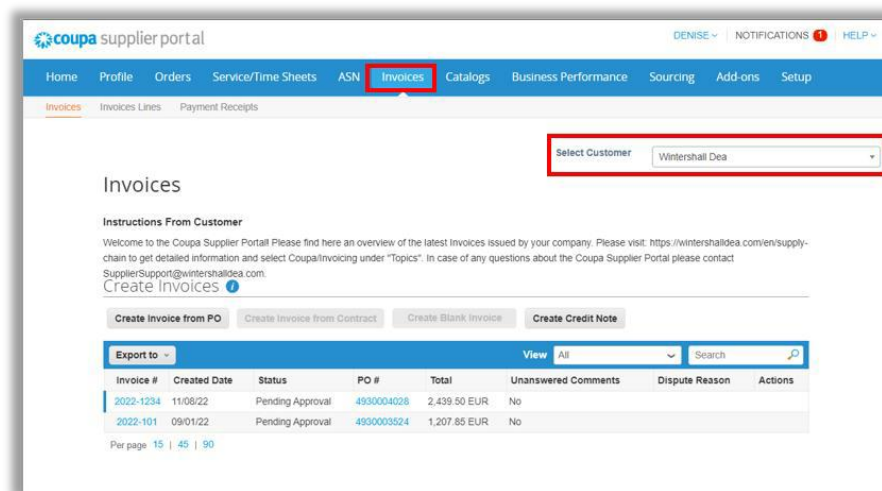
The same applies to the fields ["Remit-to"](#) and ["Ship From Address"](#). If the data are already stored, they are selectable.

The creation of the invoice is then analogous to the description in point 2 of this quick guide.

4. View your invoices

In your CSP, you can view your invoices, check the status, identify disputed invoices, manage invoices, and create custom views to track invoice payment, for example.

In the invoice table above the "Invoices" tab you can see all invoices you have created for Harbour Energy..

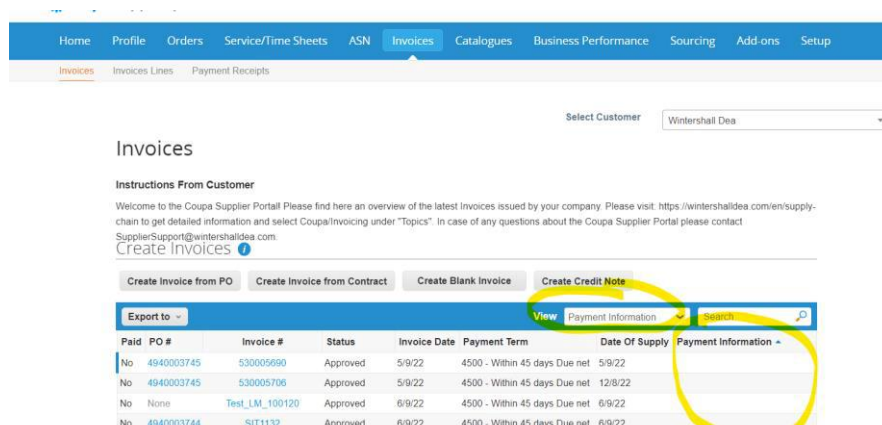


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To view an invoice, click on the "Invoice number" field and the invoice will open.

Whether an invoice has already generated a payment receipt with you can also be viewed under this view.

To do this, please switch the view to "Payment information".



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5. Change existing invoice

Once an invoice has been submitted, it cannot be changed. This ensures the integrity of the invoice processing. However, you still have several options:

- o Use the [comment](#) field in the invoice and tell Harbour Energy to reject or void the existing invoice. You can then create a new invoice.
- o Create a credit memo that credits the customer for the original value, and then create a new invoice.

In the event that your invoice has been rejected by Harbour Energy, simply create a new invoice to replace the rejected invoice.