

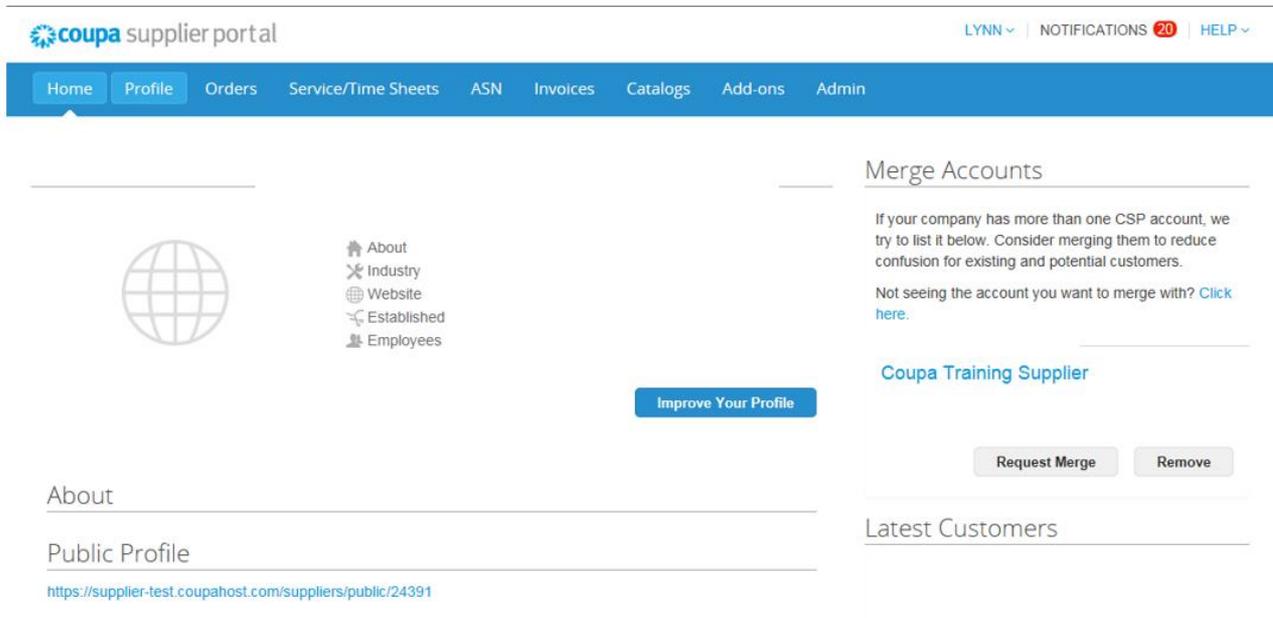
Coupa Supplier Portal

How to Create an Invoice

19 March, 2019

Creating an invoice from the CSP

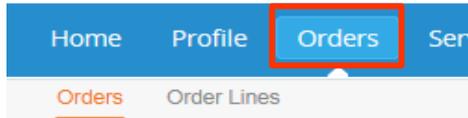
When you log into the CSP, it will look similar to this:



- Please note, you will either need to register for the Coupa Supplier Portal or you will need to link your existing Coupa Account to the Trane Technologies Supplier Record
 - Reach out to CoupaTeam@TraneTechnologies.com to receive an invitation to register for the CSP or to link an existing account.

- First log into your CSP Account [HERE](#)
- Go to the “Orders Tab” in the bar at the top of the page

 **coupa** supplier portal



- Next to your order, on the right, click the Gold Stack of Coins in the actions column.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
CPO-10008498	02/22/19	Issued	None	Security Services E2E 8	No	100,001.00 USD	
CPO-10008465	02/13/19	Issued	None	Security Services E2E 8	No	200.00 USD	

- This will bring you into the invoice.

Create Invoice [Create](#)

General Info

* Invoice #

* Invoice Date 

* Payment Term

* Currency

Status

Image Scan No file chosen

Supplier Note

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

- Fill out all fields marked with the red *
 - Make sure you select or enter your address when prompted by the pop up box
 - If you missed this or forgot, you can click the little magnifying glass to the right of the address fields

* Invoice From Address No address selected  

- Attach a PDF copy of your invoice in the “Image Scan” field

Image Scan

- Click Browse
- Select your file
- Click Open

- Go to the “Lines” section of the invoice. Here you will update the value being invoiced.
 - If you have an Amount based PO update the amount shown with the amount you are invoicing in the “Price” field.
 - Delete the value shown and enter your invoice amount

☰ Lines

Type	Description	Price
	2018 Annual PO - Le	36,428.60 

- If you have a Quantity based PO update the quantity shown with the quantity you are invoicing in the “Qty” field.

☰ Lines

Type	Description	Qty	UOM	Price
	Product	36 	Each	54.25

- No other change are needed in the Lines Section.

- Scroll to the bottom of the page to the Totals and Taxes section.
 - If you need to enter sales tax enter the % and do not select from the drop down.
 - If no sales tax is required, you can skip this step.

Totals & Taxes

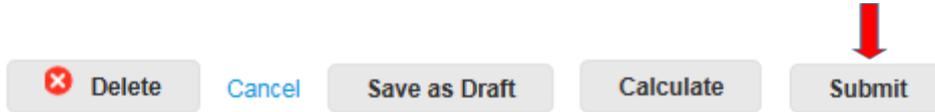
Lines Net Total	36,428.60
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> <input type="text"/> 7 % <input type="text"/> 2,550.00
Total Tax	0.00
Net Total	36,428.60
Total	36,428.60



- Click the calculate button just under the Totals and Tax section
 - This will update the total value being invoiced based on the amount in the “Price” field above and any additional charges entered into the Totals and Tax section.



- Click the submit button.



- Click the “Send Invoice” button in the pop up.



- Congratulations, your invoice is now submitted

Create Invoices ?

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

View Pending Approval ▼ Search 🔍						
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
123456	02/22/19	Pending Approval	CPO-10008499	75.00 USD	No	
Inv-66	02/22/19	Pending Approval	CPO-10008499	87,000.00 USD	No	

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- Once invoices have been reviewed/received/approved the status will update to Approved or Disputed.