How to submit an invoice via Coupa

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Overview

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with ISS Pacific (and other Customers who are part of the Coupa network). The CSP makes managing customers and transactions easy. You can manage content and settings on a customer-by-customer basis, including viewing purchase orders, creating catalogues, submitting invoices, checking the status of transactions, and more.

Invoicing Methods

- [Coupa Supplier Portal](#) - Create invoices directly from purchase orders on the Coupa Supplier Portal for free. This is the most comprehensive way to manage your interactions with Coupa and ISS.

- <u>Supplier Actionable Notifications</u> - Flip your incoming PO's into invoices right from the PO email. This is the easiest way to submit electronic invoices if you have a low volume of invoices and do not wise to log into the coupa portal. You can also acknowledge and comment on PO's right from the email.

- [cXML](#) - Tighter integration with Coupa allows you to send [cXML invoices](#) directly to Coupa. If you use cXML for purchase orders, this is a natural choice. This is suitable for suppliers with a high volume of purchase orders, or who automate their invoicing. Please contact p2p.pacific@au.issworld.com if you are interested in investigating this option.

Key Contacts

➢ **Coupa Portal** queries or issues: p2p.pacific@au.issworld.com

➢ **Invoice payment** queries: ap.enquiries@au.issworld.com

➢ **Statements** can be sent to: accountspayable.statements@au.issworld.com

Submitting invoice on Coupa Supplier Portal (CSP)

WARNING – Invoices submitted should match invoices in your accounting system and reflect the same invoice numbers. Please do not submit multiple invoices as one invoice in the portal.

Invoices must match the Purchase order details. Double check you are submitting the right invoice against the right PO and PO line. ALWAYS check the Ship to location (Goods), date of delivery (Service), Item Description (Goods). Failure to apply your Invoice to the correct Purchase Order can delay payment and potentially cause future invoices to also be delayed.

TIP – Seek clarity from your ISS contact if unsure and ALWAYS request a Purchase Order adjustment if providing an alternative product or service, ensure your ISS contact also updates the Order before submitting your Invoice.

1

To flip a PO into an invoice, either;
Click on the Create Invoice (🪙) icon for the PO in the Purchase Orders table.

Or Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button.

2 This will then flip the Purchase order information into an invoice document for you.
If you have multiple or no invoice from addresses you will be prompted with the below box to either create a new or choose an existing invoice-from address. The most recently used address is at the top of the list.

3 Once an invoice from address has been selected you will be able to start populating your invoice information. Note a lot of fields will be prepopulated based on the purchase order and your Coupa profile.

! WARNING – Please ensure you check the following key fields
1. **Invoice#**: This should reflect your system invoice number I.e. If 3 separate Invoices cover one Order, 3 Invoices need to separately input against the Order in COUPA not consolidated into 1. **DO NOT MERGE INVOICE NUMBERS.** All incorrectly processed Invoices will require a Credit note

2. **Attachments:** Attach any supporting documentation the ISS contact will require to approve this invoice

3. **Lines:**
   ➢ Delete any lines you are not including on this invoice
   ➢ Ensure the invoice line Qty/amount matches your invoice net value (line-item values exclude GST)
   ➢ Select the GST rate on each line item
   ➢ Select Calculate at the bottom of the invoice screen and check the invoice totals match your system/invoice values.

4. **Check:** Please ensure you check the invoice before submitting this to ensure it shows accurate and correct information as this will create a legal invoice for you and be what ISS approves for payment.

4 Once everything has been completed and you are happy with your invoice please select "Submit"

Invoice Status

The following are all stages upon which an Invoice can be in, a view is available to identify these quickly to ensure a resolution is obtained as quickly as possible

1. **Draft** – Invoice yet to be submitted to ISS
2. *Abandoned – Cancelled Invoice by ISS without a resolution (removed from ledgers)*
3. *Voided - Cancelled Invoice by Supplier without a resolution (removed from ledgers)*
4. *Processing – Submitted to ISS and Coupa is validating against PO & Receipt*
5. Pending Approval – Invoice received by ISS, however, is not matched to a valid Purchase Order & Receipt
6. Disputed – Invoice has been received by ISS and after review has been rejected by ISS. Check dispute reasons for correct resolution process
7. Approved – Invoice has been matched successfully to a valid Order & Receipt. Check the 'Unpaid & Paid Invoices' view for payment details. Any payment issues please email ap.enquiries@au.issworld.com

> TIP - ISS Suppliers are all on a 3-way matching process, to move an Invoice to an Approved status, the Invoice must be against a valid PO (& PO line) and the Requester of the Order MUST have added a Goods/Service Receipt to the PO. ALWAYS Check with your ISS contact if Invoice is showing as 'Pending Approval' for longer than 10 Days.

Submitting invoice via Supplier Actionable Notification (SAN)

WARNING – Invoices submitted should match invoices in your accounting system and reflect the same invoice numbers. Please do not submit multiple invoices as one invoice in the portal.

Invoices must match the Purchase order details. Double check you are submitting the right invoice against the right PO and PO line. ALWAYS check the Ship to location (Goods), date of delivery (Service), Item Description (Goods). Failure to apply your Invoice to the correct Purchase Order can delay payment and potentially cause future invoices to also be delayed.

TIP – Seek clarity from your ISS contact if unsure and ALWAYS request a Purchase Order adjustment if providing an alternative product or service, ensure your ISS contact also updates the Order before submitting your Invoice.

**1**   Flip your incoming PO's into invoices right from the PO email.

Click on the   **Create Invoice**   button in the body of the purchase order email.
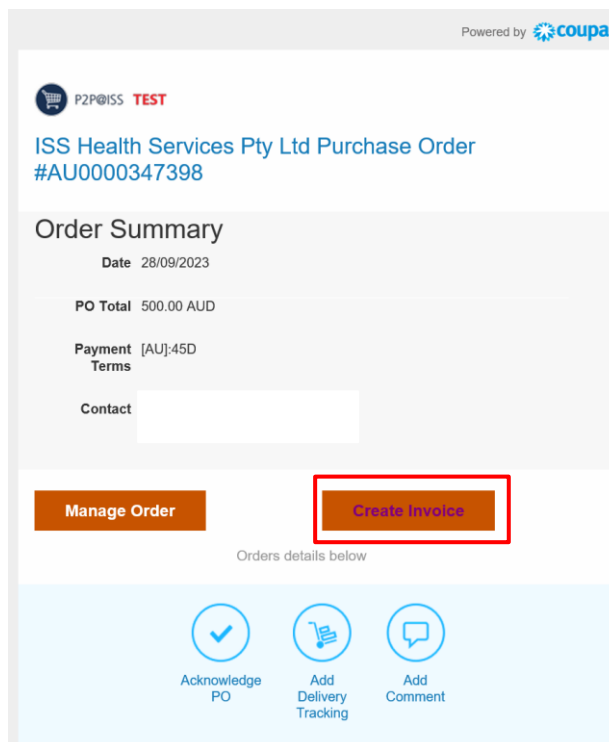
2 This will then flip the Purchase order information into an invoice document for you.
You will be prompted to enter your invoice from address and remit to information if you have not done this before and do not have a CSP. Select "Create New Remit-To" enter in all the required information and select "Create and Use"

Choose Invoice-From Address	✕
No invoice from addresses to choose from.	
To add a new address click Create New Remit-To.	
Cancel	Create New Remit-To
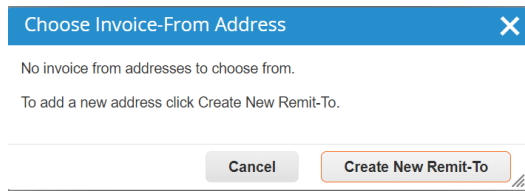
3 Once an invoice from address has been created you will be able to start populating the missing invoice information and updating information.

! WARNING – Please ensure you check the following key fields
1. **Invoice#**: This should reflect your system invoice number
2. **Attachments:** Attach any supporting documentation the ISS contact will require to approve this invoice
3. **Lines:**
   ➤ Delete any lines you are not including on this invoice
   ➤ Ensure the invoice line Qty/amount matches your invoice net value (line-item values exclude GST)
   ➤ Select the GST rate on each line item
   ➤ Check the Totals at the bottom match you system/invoice values

4. **Check:** Please ensure you check the invoice before submitting this to ensure it shows accurate and correct information as this will create a legal invoice for you and be what ISS approves for payment.

4 Once everything has been completed and you are happy with your invoice please select "Submit"