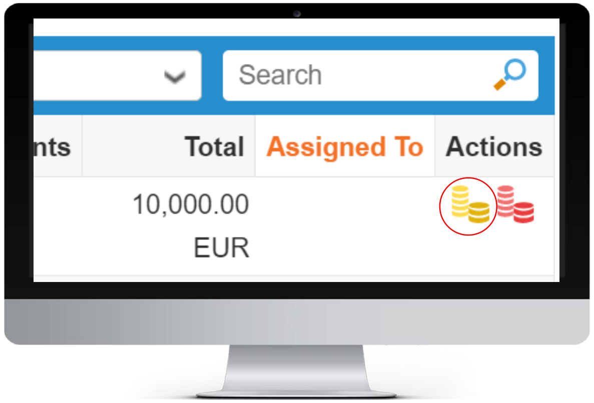
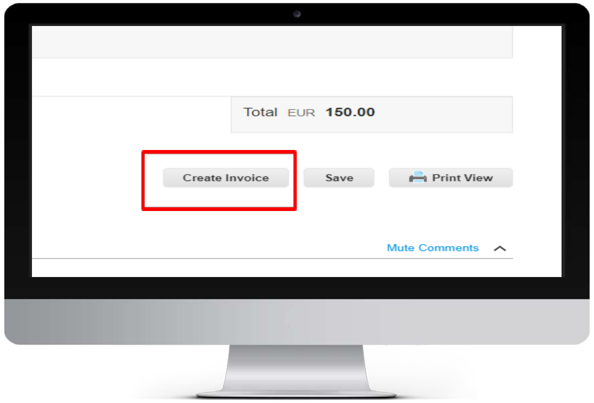
Create an Invoice from a PO

Create an Invoice from a PO

1. For creating an invoice, Log in to CSP and click on the Orders Tab
2. To flip a PO into an invoice, do one of the following:
    1. Click on the **Create Invoice icon** ( )for the PO in the **Purchase Orders** table
    2. Click on the **PO Number** link to open the purchase and click on the **Create Invoice** button
3. When creating the invoice, fill in all **mandatory fields** marked with **red asterisk** * and make sure you attach the **invoice pdf** in the attachment.





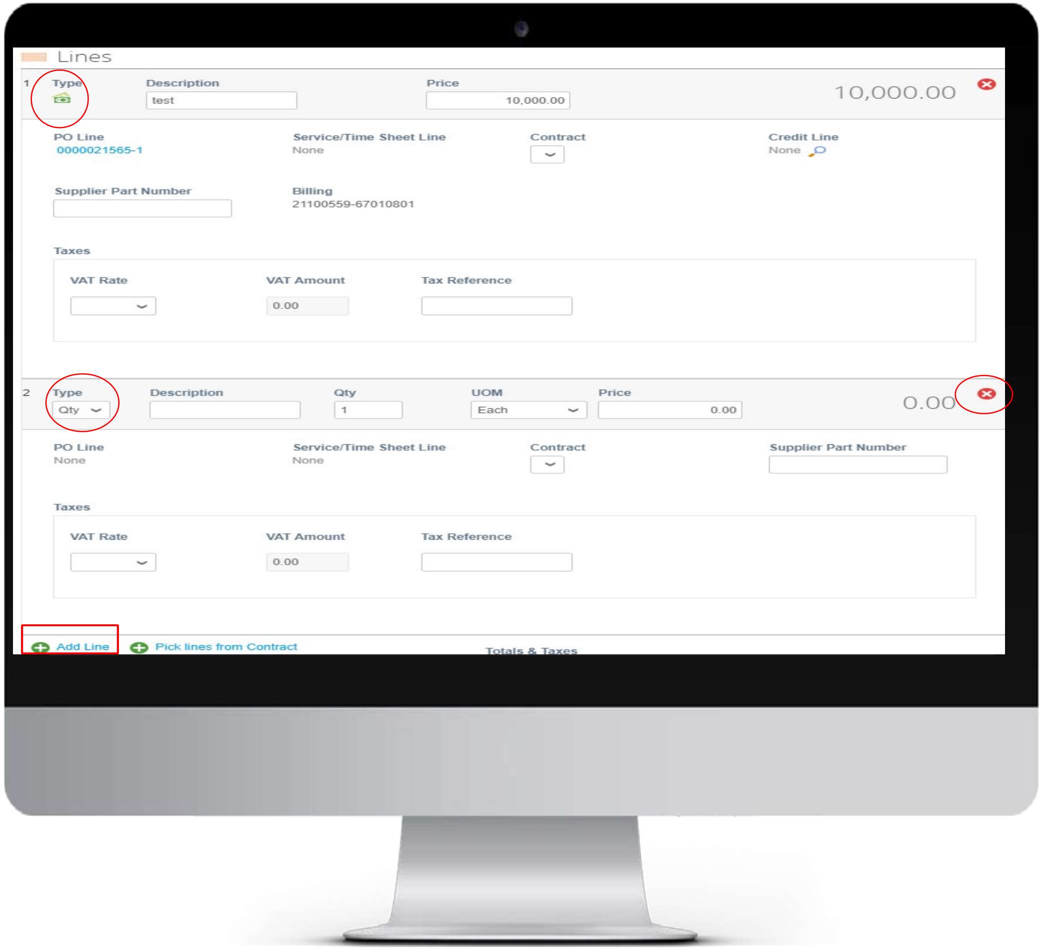
By 'flipping' the PO to an invoice directly on CSP will pre-populate most of the fields, hence making it easy and accurate

Create an Invoice from a PO

Create an Extra line

- Please be aware that invoices with **multiple VAT Rates** should be created with separate lines for each of the VAT.
- When creating an extra line the Order **Type** is automatically set to "**Quantity" (QTY)**. Please make sure to change the **Type** to how the first line is created.
- You can also add additional lines by clicking on **Add Line** or delete lines by clicking on the **delete icon**.
- Quantity (QTY) is represented by 

- Amount (AMT) is represented by 



*There are two Order Types: Quantity and Amount. The **Quantity** is recognized by the Abbreviation **"QTY"** and **Amount** is recognized by **"Amt"***

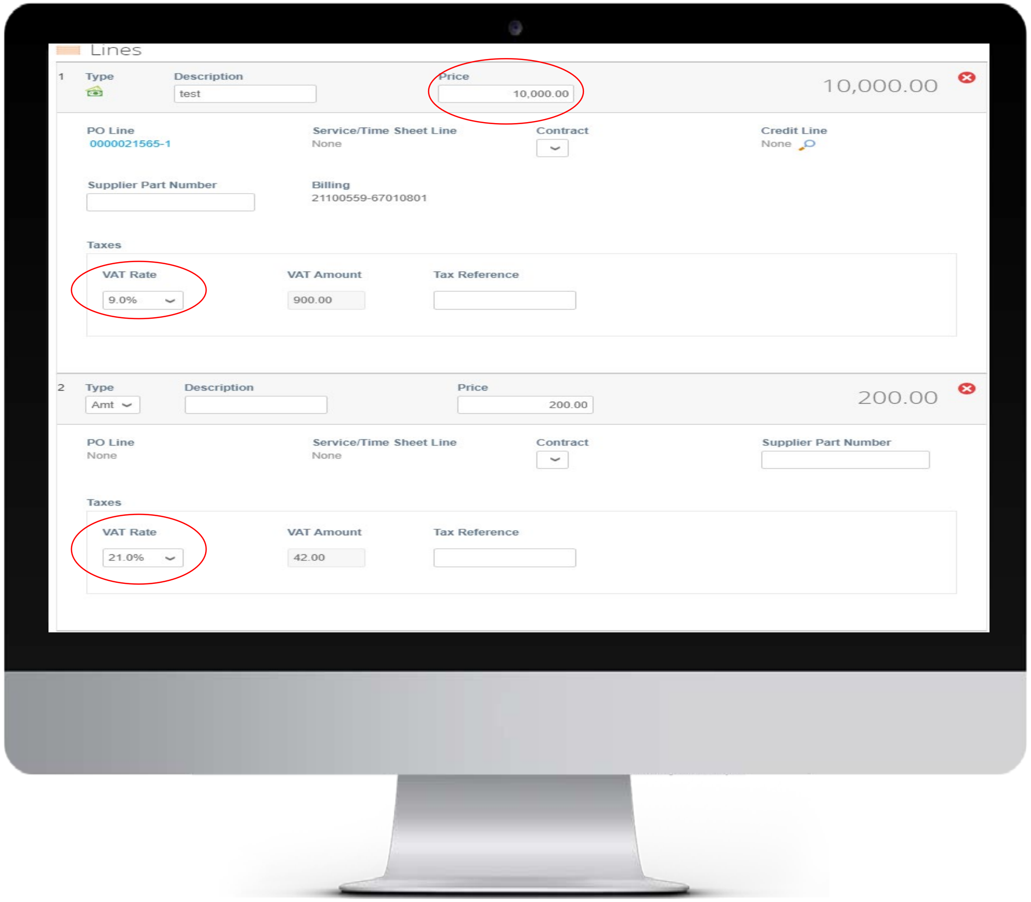
Supplier

Create an Invoice from a PO

Filling in the Price and choosing the VAT Rate

- When filling in the **Price**, line 1 is always automatically filled in with the **PO amount**. Please make sure to change the amount into the invoice amount **excluding Taxes**.

- After filling in the **Price** You will need to add Taxes by adding a **VAT**
Rate for each line level item.



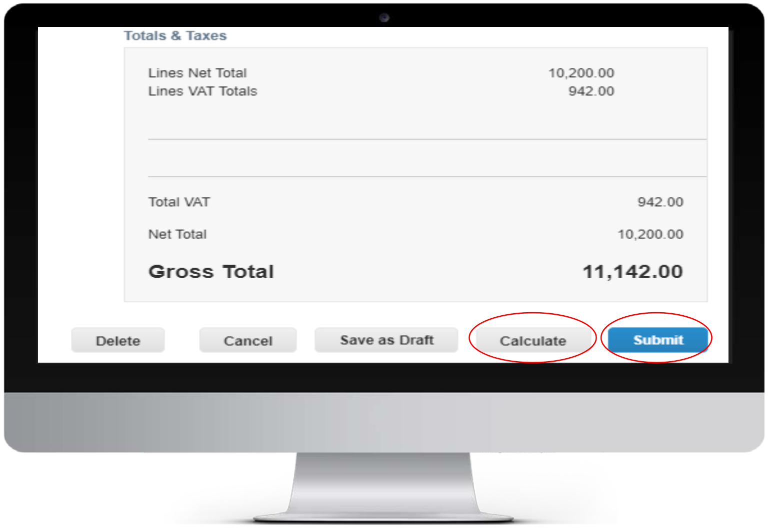
⚠ ***Please*** **Note that if you have more than one (1) VAT Rate, please create separate lines**

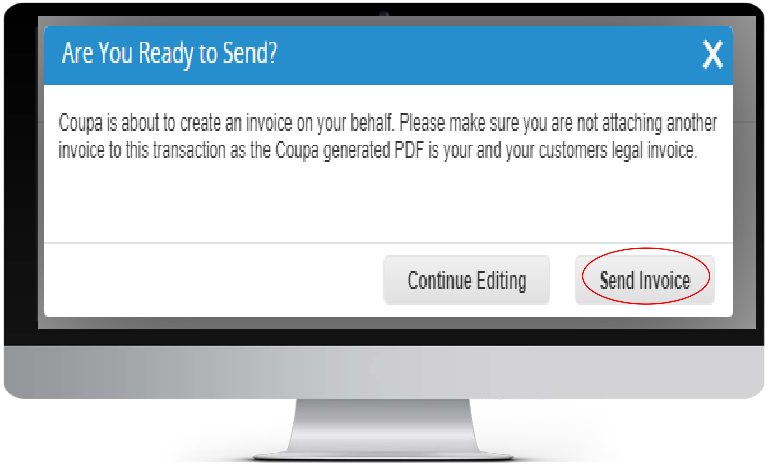
Supplier

Create an Invoice from a PO

Sending your invoice

- When all the mandatory fields are filled in sucessfully, click on **Calculate** so that coupa can calculate the **Gross and Net total amount**.
- When the total amount matches your invoice amount, click on **Submit**. Note that, once you submit an invoice, you can not withdraw it back.
- When you click on **Submit**, you will receive a confirmation notification, click on **Send Invoice**. The invoice will be delivered to KPMG Accounts Payable (AP) team for processing.

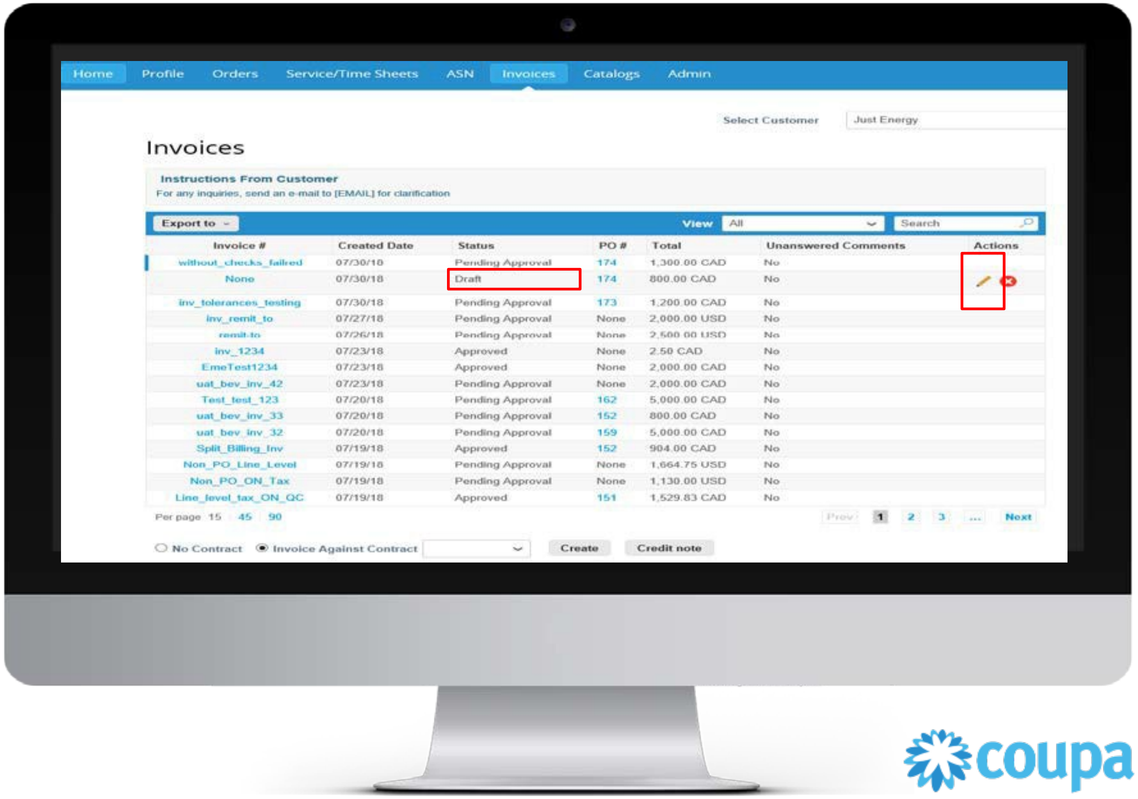




Viewing and Editing an Invoice

Viewing and Editing a draft Invoice

1. To edit a draft invoice, do one of the following:
   a. Click on the **Edit** ( ) icon for the invoice in the **invoices** table.
   b. Click on the **Invoice #** link to open the invoice and click the **Edit** button at the bottom of the invoice screen



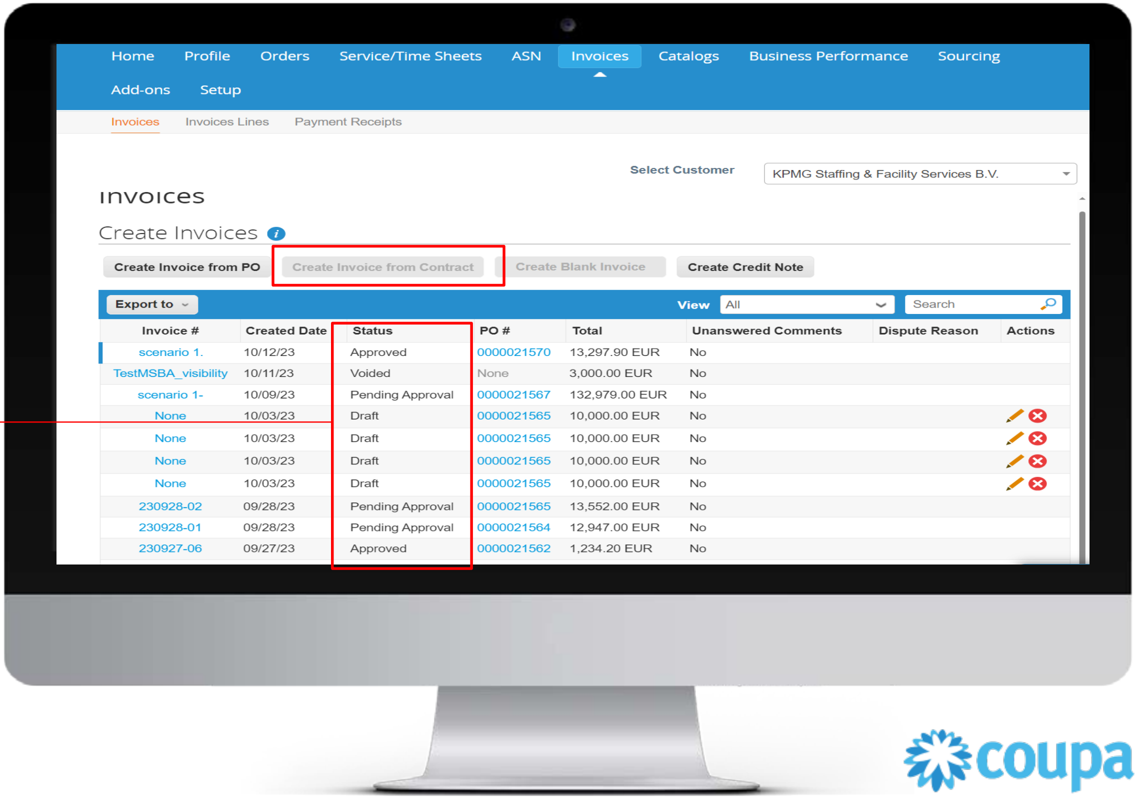
When creating an invoice against a contract, you must first select the contract from drop-down list

Creating a Non-PO or Contract Based Invoice

Creating a Non-PO or Contract Based Invoice

1. To create an invoice from a contract or against a contract, select the relevant button (**Create Invoice from Contract**).

The status column allows the supplier to have up-to-date status on their invoices



coupa

When creating an invoice against a contract, the supplier must first select the contract from drop-down list

Supplier

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Invoice Status

Invoice Status

Invoices can have the following statuses

Status	Description
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. See Disputed invoices for more info.
Draft	The invoice has been created, but it hasn't been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	There's something wrong with the invoice. Contact your customer to get the invoice back on track.

*When an invoice is disputed please make sure to read the dispute reason and take the necessary action so that the invoice can be paid on time. In case dispute reason is not clear to you, please contact **suppliers@kpmg.nl** for help*

Supplier

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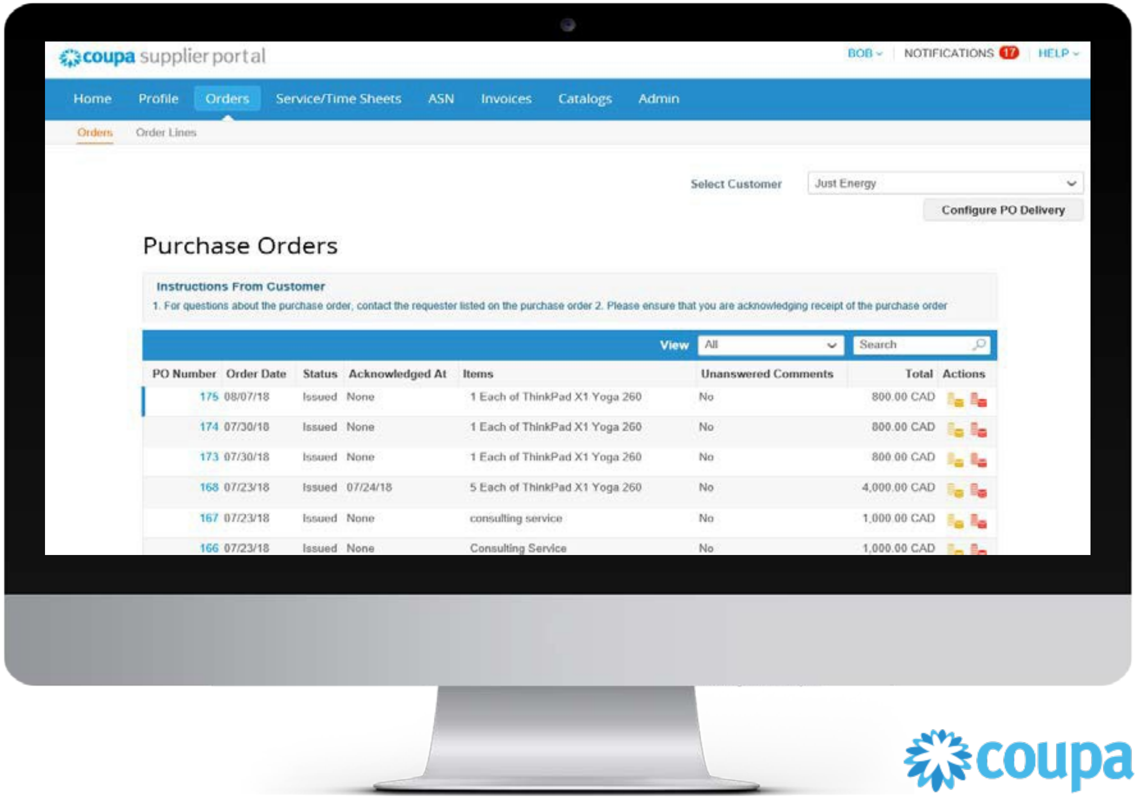
View and Manage PO's

View and Manage PO's

1. Click on the **Orders** tab on the main menu. The **Purchase Orders** page appears.
2. Under the **Purchase Orders** the supplier can see a table with all purchase orders received.



Directly from the **Purchase Orders** table, you can flip the POs to invoices or create a credit note.

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Purchase Order status

Purchase Order Status

Purchase orders can have the following status

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Canceled	The PO is cancelled and doesn't need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	There's something wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.