

# Supplier Instructions on How to create and submit an Invoice in the Coupa Supplier Portal (CSP)





# Creating and Submitting an Invoice

# How Create and Submit an Invoice



Below is a link to the Coupa Supplier Portal (CSP) where you can log into Coupa or Register. Please be aware that the email address for registering your CSP account must be the same as the one that the CSP invite was sent to

Log into Coupa using URL  
<https://supplier.coupahost.com/sessions/new>



The screenshot shows the Coupa Supplier Portal login interface. At the top left, it says "coupa supplier portal" with the Coupa logo. At the top right, there is a "Secure" indicator with a lock icon. The main content area features a central white box with a light blue background. Inside this box, there are two buttons at the top: "Log in" (highlighted in blue) and "Sign up" (white with a blue border). Below these buttons, the text "Login to your Coupa account" is displayed. There are two input fields: "Email Address" with the placeholder text "Enter email address" and "Password" with the placeholder text "Enter password". Below the password field is a blue link that says "Forgot Password?". At the bottom of the white box is a large orange button labeled "Log In". The footer of the page is a dark blue bar with three links: "Features", "Solutions", and "Resources".

# How Create and Submit an Invoice



Once you have received a Purchase Order (PO), and *delivered* the goods or service, you will want to submit an invoice to Mitie. Please follow the coming instructions. **Note: Make sure you have your invoice details to hand as you be required to enter them during the following steps. You are not required to add a copy of your invoice as an attachment. VAT will automatically be calculated and added to your invoice**

Click 'Orders' to be found in the blue bar

The POs that have been sent to your organisation from Mitie will be displayed

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

Setup

Orders Order lines Returns Order Changes Order Line Changes Deliveries

You have 1 customer announcements related to Orders (Mitie Group Plc) [View All Announcements](#)

Select Customer Mitie Group Plc - R33 Regression Ltd

## Purchase Orders

**Instructions From Customer**

Please select the golden coins icon next to the relevant PO to create an associated invoice. Invoices above the PO value are likely to be disputed. If the relevant PO does not fully cover the invoice, you should review the invoice for correctness and, if appropriate, contact the requester identified on the PO who can request a PO Change. You can contact the requester directly in the comments section of the PO by entering @ and the requesters name and highlighting any PO discrepancy.

Attention

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
G00000000493	18/05/2022	Issued	10/06/2022	1 Each of Cat Change Test	No	100.00 GBP		

# How Create and Submit an Invoice



Click 'Orders' to be found in the blue bar

To create an invoice, click the **gold coins** to be found under 'Actions'. It may take a few seconds to load the next screen

**Note:** You must not use the red coins to create credit notes. Please refer to the Mitie training document on 'How to create and submit Coupa credit notes'



The screenshot shows the Mitie web interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a sub-navigation bar with 'Orders', 'Order lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Deliveries'. A yellow banner at the top of the main content area states: "You have 1 customer announcements related to Orders (Mitie Group Plc) [View All Announcements](#)". Below the banner is a 'Select Customer' dropdown menu currently set to 'Mitie Group Plc - R33 Regression Ltd'. The main heading is 'Purchase Orders'. Underneath is the section 'Instructions From Customer' with a paragraph of text: "Please select the golden coins icon next to the relevant PO to create an associated invoice. Invoices above the PO value are likely to be disputed. If the relevant PO does not fully cover the invoice, you should review the invoice for correctness and, if appropriate, contact the requester identified on the PO who can request a PO Change. You can contact the requester directly in the comments section of the PO by entering @ and the requesters name and highlighting any PO discrepancy. Attention". Below the instructions is a call-to-action box: "Click the Action to Accept the Purchase Order and Create an Invoice using its data". A red box highlights the gold coins icon in the 'Actions' column of the table below. The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row of data is: G00000000493, 18/05/2022, Issued, 10/06/2022, 1 Each of Cat Change Test, No, 100.00 GBP. The 'Actions' column for this row contains three icons: a gold coin, a red coin, and a red coin.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
G00000000493	18/05/2022	Issued	10/06/2022	1 Each of Cat Change Test	No	100.00 GBP		

# How Create and Submit an Invoice



Note: If you have multiple Legal Entities on your Coupa account, follow these instructions, if you do not, skip this slide and move on to the next slide

A 'Choose Invoicing Details' pops up.

Select the appropriate Legal Entity and click 'Save'



The screenshot shows a dialog box titled "Choose Invoicing Details" with a close button (X) in the top right corner. It contains three dropdown menus, each with a red asterisk indicating it is a required field: "\* Legal Entity" (set to "Select"), "\* Remit-To" (set to "Select"), and "\* Ship-From Address" (set to "Select"). To the right of the "Legal Entity" dropdown is a green plus icon and the text "Add New". A "Cancel" button is located at the bottom right of the dialog.



The screenshot shows the same "Choose Invoicing Details" dialog box. The "\* Legal Entity" dropdown is now set to "Test". Below it, the "Invoice From" address is displayed: "Clapham Common", "Clapham High Street", "Boston, SW10 2QS", "United States", and "United States (US123456)". The "\* Remit-To" dropdown is set to "Clapham Common, Clapham H" and the "\* Ship-From Address" dropdown is set to "Clapham Common, Clapham H". Both dropdowns have a green plus icon and "Add New" text to their right. The "Cancel" button is now greyed out, and a blue "Save" button is visible at the bottom right.

# How Create and Submit an Invoice



You can now create an invoice



Select Customer Mitie Group Plc - R33 Regression Ltd

## Create Invoice Create

**General Info**

\* Invoice #

\* Invoice Date

Payment Term V030 - 30 Days (From Invoice Date)

Date of Supply

\* Currency

Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

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

**From**

\* Supplier R33 REGRESSION LTD\_0000548163

Supplier Tax ID

\* Invoice-From Address Test  
Clapham Common  
Clapham High Street  
Boston, SW10 2QS  
United States

\* Remit-To Address Test  
Clapham Common  
Clapham High Street  
Boston, SW10 2QS  
United States

Beneficiary Name: Test

\* Ship-From Address Test  
Clapham Common  
Clapham High Street  
Boston, SW10 2QS  
United States

**To**

Customer Mitie Group Plc

\* Bill-To Address MITIE Shared Services Limited  
Level 12 The Shard  
32 London Bridge Street  
London  
SE1 9SG  
United Kingdom

# How Create and Submit an Invoice



Your PO will be either **Amount** or **Qty** based

**Amount:** Usually used for POs relating to services. More than one invoice can be submitted against a Purchase Order. As you may need to submit more than one invoice you will find that the price can be changed according to the value of the invoice that you wish to submit

**Qty** Usually used for POs relating to goods. A Single invoice may be submitted against such purchase orders and the Qty field cannot be changed

Note: If you find you are not able to invoice against the PO (i.e. due to a QTY PO being issued and not able to change the price) you must contact your Mitie requester by adding a comment against the PO asking them to cancel the PO and re-raise an AMT based PO. You are unable to create an invoice with a greater value than the PO



Lines			
Type	Description	Price	
	Test PO	1,000.00	1,000.00



Lines					<input checked="" type="checkbox"/> Line Level Taxation
Type	Description	Qty	UOM	Price	
	Cat Change Test	1	Each	100.00	100.00

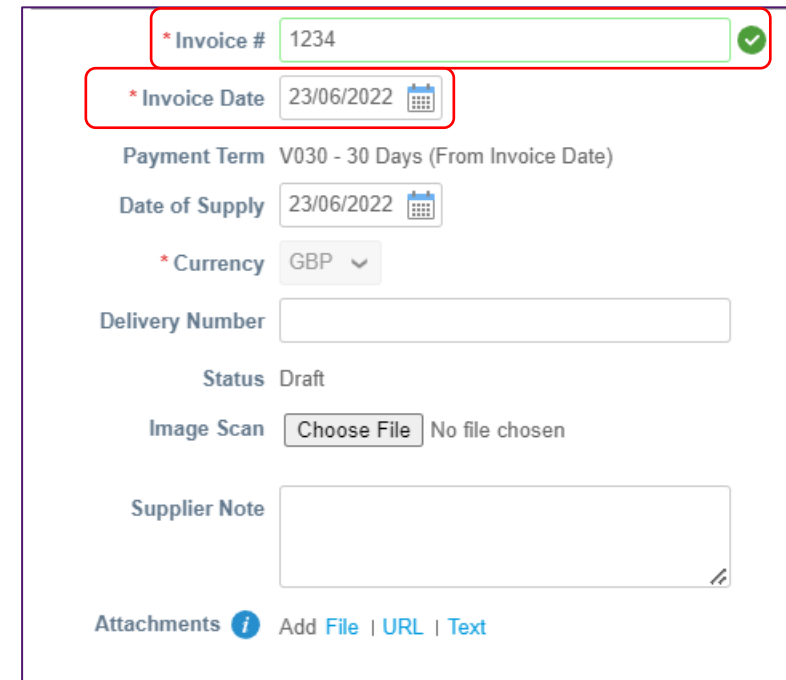


# How Create and Submit an Invoice

**Invoice #** – enter the invoice number from your ERP system

**Invoice Date** – must be the same as your invoice date otherwise it could affect your payment terms if it's not changed

**Buyer VAT IDVAT** - Ensure Buyer VAT IDVAT is GB for UK



\* Invoice # 1234 ✓

\* Invoice Date 23/06/2022 📅

Payment Term V030 - 30 Days (From Invoice Date)

Date of Supply 23/06/2022 📅

\* Currency GBP ▾

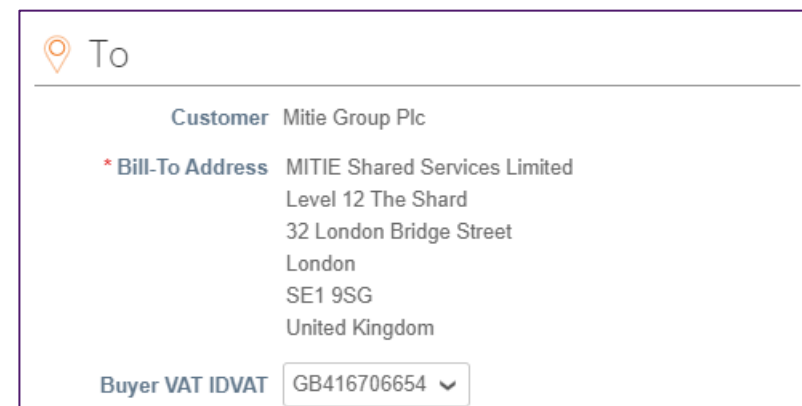
Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

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



📍 To

---

Customer Mitie Group Plc

\* Bill-To Address MITIE Shared Services Limited  
Level 12 The Shard  
32 London Bridge Street  
London  
SE1 9SG  
United Kingdom

Buyer VAT IDVAT GB416706654 ▾

# How Create and Submit an Invoice



If you have multiple lines on a PO, you are able to adjust the **Amount** price against each line. You may also remove the lines that you do not wish to invoice against this time by clicking the



**Taxes** – if you select an ‘Exempt’ tax rate, a reference box is displayed

In the Tax reference box start typing exempt and it will start to show exception options from which you can make a selection



Type	Description	Qty	UOM	Price	
	Cat Change Test	1	Each	100.00	100.00

PO Line: G00000000493-1

Contract:

Supplier part number:



Tax Description	Tax Rate	Tax Amount	Tax Reference
GB: VE - Exempt - 0% <input type="text"/>	0.0	0.00	<input type="text"/>

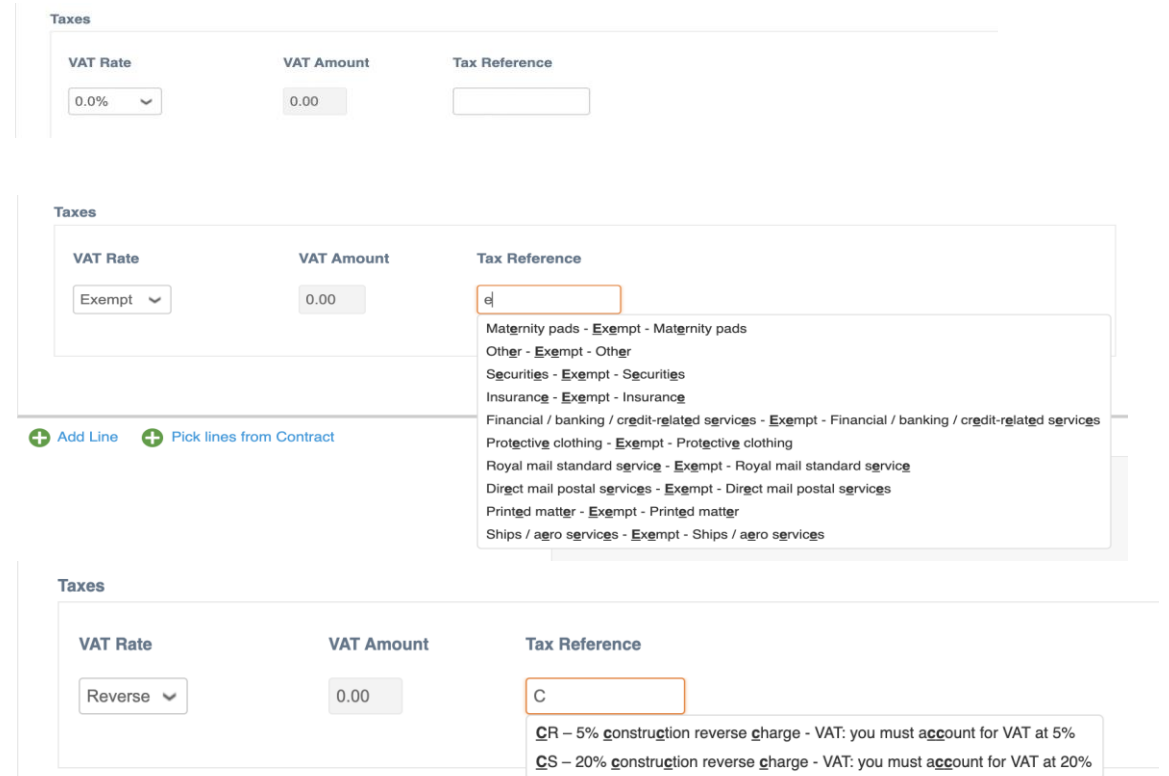


Tax Description	Tax Rate	Tax Amount	Tax Reference
GB: VE - Exempt - 0% <input type="text"/>	0.0	0.00	exempt <input type="text"/>

# Taxes - 0%, Exempt and Reverse Charge

In the VAT drop down select the relevant VAT – Options depending on country, UK are 20%, 12.5%, 5.0%, 0.0% Exempt and Reverse Charge

- 0%.
  - The tax reference can be left blank
- Exempt
  - In the Tax Reference type E and select an option
- Reverse Charge
  - In the Tax Reference type C and select an option



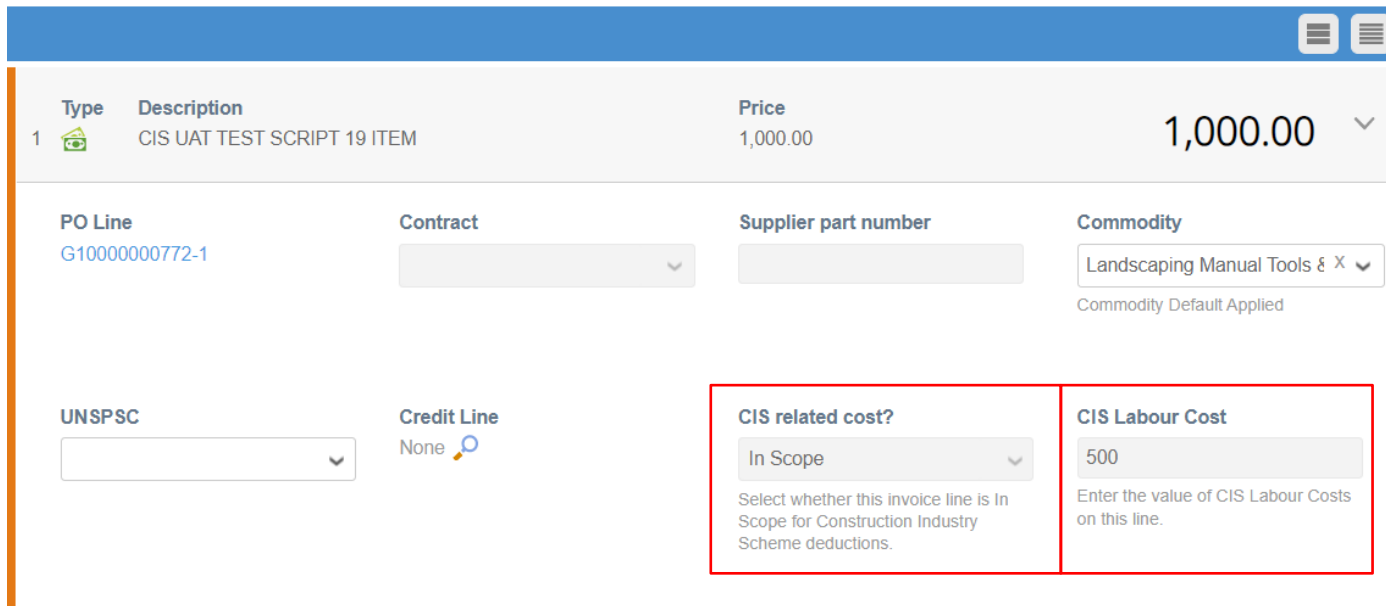
The image displays three screenshots of a VAT configuration interface. Each screenshot shows a 'Taxes' section with three columns: 'VAT Rate', 'VAT Amount', and 'Tax Reference'.  
1. The first screenshot shows 'VAT Rate' set to '0.0%', 'VAT Amount' as '0.00', and 'Tax Reference' as an empty field.  
2. The second screenshot shows 'VAT Rate' set to 'Exempt', 'VAT Amount' as '0.00', and 'Tax Reference' as 'E'. A dropdown menu is open below, listing various exempt categories such as 'Maternity pads - Exempt - Maternity pads', 'Other - Exempt - Other', 'Securities - Exempt - Securities', 'Insurance - Exempt - Insurance', 'Financial / banking / credit-related services - Exempt - Financial / banking / credit-related services', 'Protective clothing - Exempt - Protective clothing', 'Royal mail standard service - Exempt - Royal mail standard service', 'Direct mail postal services - Exempt - Direct mail postal services', 'Printed matter - Exempt - Printed matter', and 'Ships / agro services - Exempt - Ships / agro services'. Below the list are buttons for '+ Add Line' and '+ Pick lines from Contract'.  
3. The third screenshot shows 'VAT Rate' set to 'Reverse', 'VAT Amount' as '0.00', and 'Tax Reference' as 'C'. A dropdown menu is open below, listing 'CR - 5% construction reverse charge - VAT: you must account for VAT at 5%' and 'CS - 20% construction reverse charge - VAT: you must account for VAT at 20%'.

Note: You can only have one VAT rate per line (if PO is one line, you can only PO flip one invoice line, if you invoice 2 VAT rates you need 2 lines on the PO)

Always click calculate to check the invoice values before you submit as mistakes can not be changed without a credit note and re-invoice.

# CIS Invoices

- CIS is Construction Industry Scheme each supplier must select if their invoice is in scope or out of scope.
- CIS invoices can be submitted by the CSP. It is the responsibility of the supplier to indicate the labour cost of the service they provide and indicate the tax treatment by selecting “Reverse Charge” as the correct Tax Rate.
- Submission warnings will guide the supplier to ensure they provide the correct information on the invoice.
- Note: CIS gross status suppliers supplying materials only, select CIS related cost to In Scope, set “0 pence” Labour and use Reverse Charge (Tax) to ensure the invoice is automatically processed



Type	Description	Price
1	CIS UAT TEST SCRIPT 19 ITEM	1,000.00

PO Line: G10000000772-1

Contract:

Supplier part number:

Commodity: Landscaping Manual Tools £ X

UNSPSC:

Credit Line: None

**CIS related cost?**  
In Scope   
Select whether this invoice line is In Scope for Construction Industry Scheme deductions.

**CIS Labour Cost**  
500   
Enter the value of CIS Labour Costs on this line.

# How Create and Submit an Invoice



Click 'Calculate' and you will see that the Tax total align with the VAT status that you selected

Review the invoice that you have created and the entries that you have made. If this aligns with the invoice in your ERP system click 'Submit'

Against 'Are you ready to send?' click 'Send Invoice'



Total Taxes	
Lines Net Total	100.00
Lines Tax Totals	0.00
<hr/>	
Total Tax	0.00
Net Total	100.00
<b>Total</b>	<b>100.00</b>

Buttons: Delete, Cancel, Save as draft, Calculate, **Submit**

Are you ready to send? ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Buttons: Continue Editing, **Send Invoice**