



Invoices View

How to set-up your Invoices View in your Coupa Supplier Portal (CSP)

This guide will help you set-up your invoices view in your Coupa supplier portal (CSP) to show payment details from Mitie on the same view

This will process will add Invoice date, Paid status and Payment information to your view.

Invoices

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.

Create Invoices

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

Export to View Simon's view

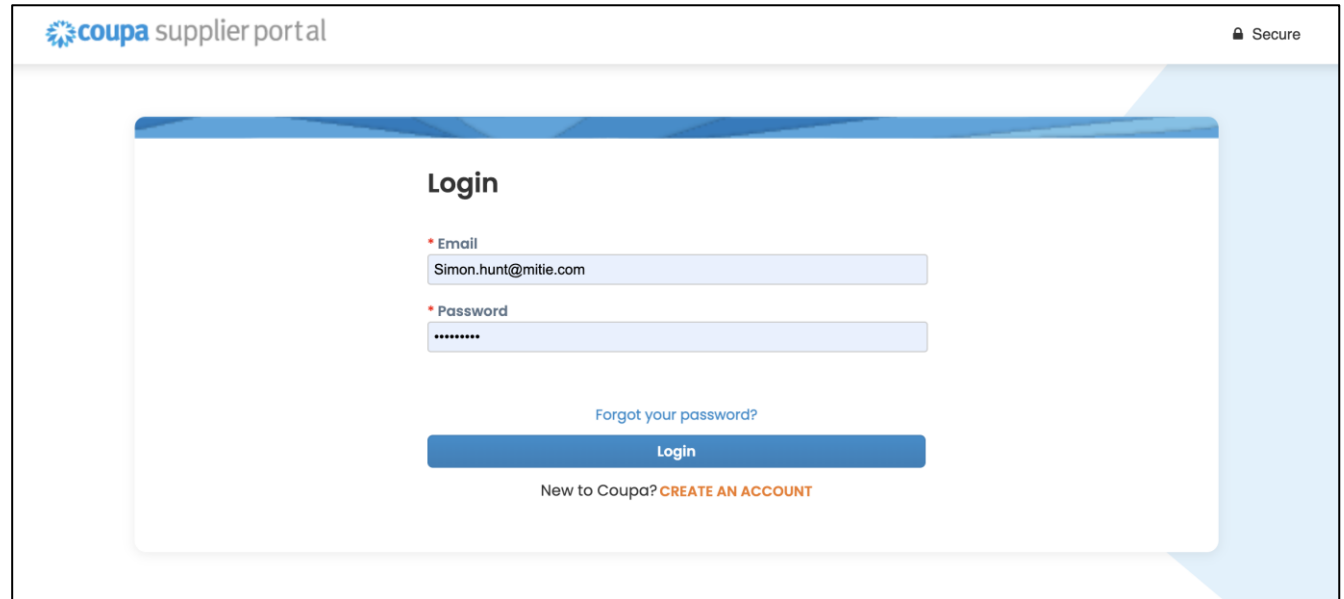
Invoice #	Invoice Date	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions	Paid	Payment Information
Tests 1234	14/03/2024	14/03/2024	Draft	G10000360053	10.00 GBP	No			No	
CISTEST050324F	12/03/2024	12/03/2024	Draft	G10000360053	12.00 GBP	No			No	
CISTEST050324E	12/03/2024	12/03/2024	Approved	G10000360053	12.00 GBP	No			No	
CISTEST050324D	11/03/2024	11/03/2024	Approved	G10000360053	10.00 GBP	No			No	
CISTEST1103C	11/03/2024	11/03/2024	Approved	G10000360053	100.00 GBP	No			No	
CISTEST1103B	11/03/2024	11/03/2024	Approved	G10000360053	100.00 GBP	No			No	
CISTEST1103A	11/03/2024	11/03/2024	Pending Approval	G10000360053	100.00 GBP	Yes			No	
None	11/03/2024	11/03/2024	Voided	G10000360053	1,000.00 GBP	No			No	
CISTEST050324B	05/03/2024	05/03/2024	Draft	G10000360053	100.00 GBP	No			No	

You will require a CSP account

1.

CSP

Log into your CSP account.



The screenshot shows the Coupa supplier portal login interface. At the top left, the logo and text "coupa supplier portal" are visible. At the top right, there is a "Secure" indicator with a lock icon. The main content area is a white box with a blue header and footer. The header contains the word "Login" in bold. Below the header are two input fields: "Email" with the value "Simon.hunt@mitie.com" and "Password" with masked characters. Below the password field is a link "Forgot your password?". At the bottom of the form is a blue "Login" button and a link "New to Coupa? CREATE AN ACCOUNT".

2.

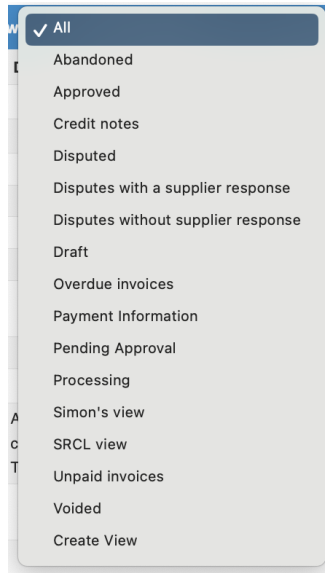
'Invoices'

In the big blue bar at the top of your screen click on Invoices

In the smaller blue bar, Click on the downward arrow in the View box



This will open a dropdown.
Click Create View at the bottom.



coupa supplier portal SIMON | NOTIFICATIONS 31 | HELP

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

Setup

Invoices Invoices Lines Payment Receipts

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

Select Customer Mitie Group Plc - Test Supplier SH

Invoices

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Create Invoices

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

Export to View All Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
GR-DWP	22/02/2023	Approved	B01200001095	-120.00 GBP	No		

3.

‘Create New data Table view’

Once you click create view it will open the create view data table

In the name field you can call it your company name view i.e. Simon’s View as an example.

Visibility you can make it available to just your account or everyone who has access to your companies CSP.

Then go to Columns section.

The screenshot shows a web application interface for creating a new data table view. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogues, Payments, Business Performance, Sourcing, and Add-ons. Below the navigation bar, there are sub-links for Invoices, Invoices Lines, and Payment Receipts. A yellow notification banner at the top states: "You have 1 customer announcements related to Invoices (Mitie Group Plc) View All Announcements".

The main content area is titled "Create New data table view" and includes a "Select Customer" dropdown menu set to "Mitie Group Plc - Test Supplier SH".

The "General" section contains the following fields:

- Name: [Text input field]
- Visibility: Only Me, Everyone
- Start with view: [Dropdown menu set to "All"]

The "Conditions" section includes:

- Match Conditions: [Dropdown menu set to "Match all conditions"]
- Add group of conditions: [Button]
- Filter By: [Dropdown menu set to "Invoice #"]
- Filter Clause: [Dropdown menu set to "is"]
- Filter Text: [Text input field]
- + [Add condition button]

The "Columns" section includes:

- Drag columns to the right to select, to the left to unselect and vertically to change column order.
- You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

Column selection interface:

Available columns	Selected columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Gross Total

4.

'Columns'

By using drag and drop

In Available Columns find Invoice date and drag and drop it under Invoice # in Selected columns.

Next find Paid & Payment Information then drag and drop them at the bottom of Selected Columns

Selected columns

Invoice #
Invoice Date
Created Date
Status
PO #
Gross Total
Unanswered Comments
Dispute reason
Actions
Paid
Payment Information

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.

You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item or ESC to cancel the reordering.

Available columns

Commented
Comments
Date Of Supply
Date Of Supply
Delivery Number
Disputed Date
Document Type
Invoice Date
Last Updated Date
Linked document
Original Invoice Date
Original Invoice Number
Paid
Payment Information
Payment Term

Selected columns

Invoice #
Created Date
Status
PO #
Gross Total
Unanswered Comments
Dispute reason
Actions

5.

‘Columns continued’

Your Selected columns should look like the example shown.

You can drag and drop more Options or change the order of them.

Once you happy with your selection scroll to the bottom.

Click Save


The screenshot displays a user interface for selecting columns. It is divided into two main sections: 'Available columns' on the left and 'Selected columns' on the right. Each section contains a vertical list of column names, each enclosed in a light gray rectangular box. The 'Available columns' list includes: Comments, Date Of Supply, Delivery Number, Disputed Date, Last Updated Date, Linked document, Original Invoice Date, Original Invoice Number, Payment Term, and Document Type. The 'Selected columns' list includes: Invoice #, Invoice Date, Created Date, Status, PO #, Gross Total, Unanswered Comments, Dispute reason, Actions, Commented, Paid, and Payment Information. The interface is clean and uses a simple, sans-serif font.

Available columns	Selected columns
Comments	Invoice #
Date Of Supply	Invoice Date
Delivery Number	Created Date
Disputed Date	Status
Last Updated Date	PO #
Linked document	Gross Total
Original Invoice Date	Unanswered Comments
Original Invoice Number	Dispute reason
Payment Term	Actions
Document Type	Commented
	Paid
	Payment Information

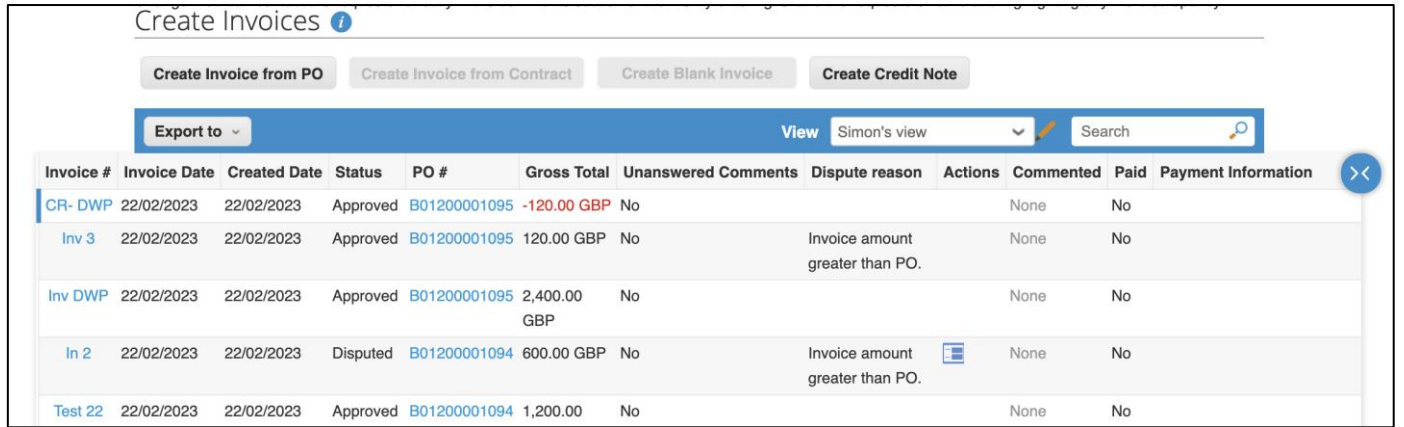
6.


'View'

Now your view should be shown on your screen with the columns you selected.


To expand your screen click 


You will now see real time information on when Mitie make payments for your invoices.



Create Invoices 

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

Export to View Simon's view 

Invoice #	Invoice Date	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions	Commented	Paid	Payment Information
CR- DWP	22/02/2023	22/02/2023	Approved	B01200001095	-120.00 GBP	No			None	No	
Inv 3	22/02/2023	22/02/2023	Approved	B01200001095	120.00 GBP	No	Invoice amount greater than PO.		None	No	
Inv DWP	22/02/2023	22/02/2023	Approved	B01200001095	2,400.00 GBP	No			None	No	
In 2	22/02/2023	22/02/2023	Disputed	B01200001094	600.00 GBP	No	Invoice amount greater than PO.		None	No	
Test 22	22/02/2023	22/02/2023	Approved	B01200001094	1,200.00	No			None	No	

For all Coupa supplier help and guides Click [here](#) for Mitie Suppliers website.