



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

February 26

The future of high-performing places



Invoices

This guide will help you set-up your invoices view in your Coupa supplier portal (CSP) to show payment details from Mitie by creating a new view.

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

You will require a CSP account

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

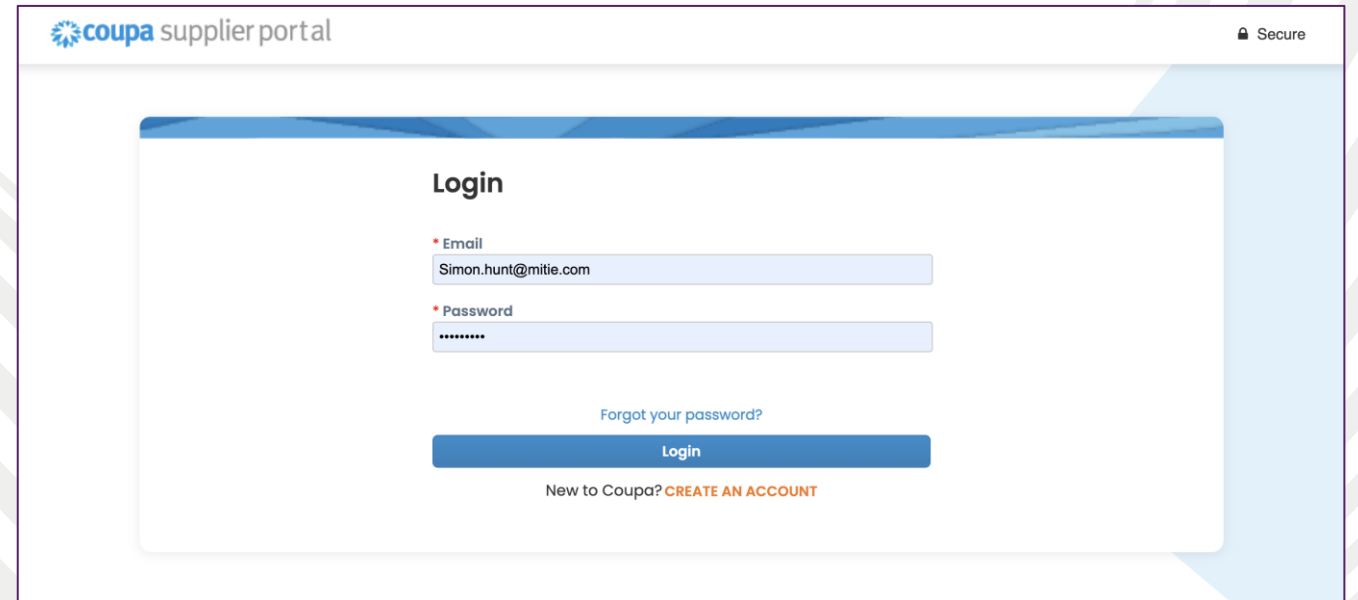
Simon's view

Search

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	

Login to your CSP Account

Log into your CSP account



The screenshot shows the Coupa supplier portal login interface. At the top left, the text "coupa supplier portal" is displayed next to the Coupa logo. At the top right, there is a "Secure" indicator with a lock icon. The main content area is titled "Login" and contains two input fields: "Email" with the value "Simon.hunt@mitie.com" and "Password" with masked characters. Below the password field is a link for "Forgot your password?". A blue "Login" button is positioned below the links. At the bottom of the form, there is a link for "New to Coupa? CREATE AN ACCOUNT".

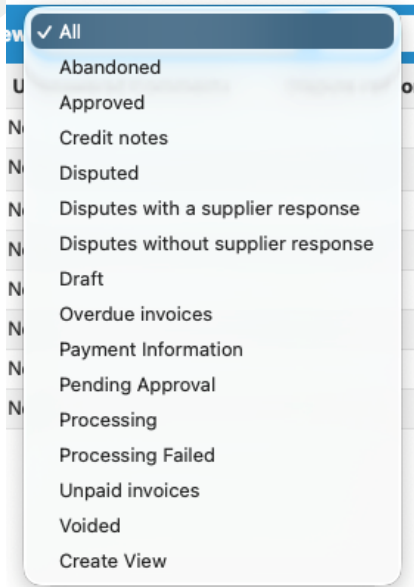
Invoices

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.



Invoices

Instructions From Customer

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Create Invoices

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

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
1PTEST2001A	20/01/2026	Pending Approval	None	0.01 GBP	No		

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 the 'Create New Data Table View' page in the Coupa Supplier Portal. The page is for the user 'SIMON' and is for the customer 'Mitie Group Plc'. The 'General' section includes a 'Name' field, 'Visibility' options (radio buttons for 'Only Me' and 'Everyone'), and a 'Start with view' dropdown set to 'All'. The 'Conditions' section has a 'Match Conditions' dropdown set to 'Match all conditions' and a filter rule: 'Filter By Invoice # is Filter Text'. The 'Columns' section shows two columns: 'Available columns' and 'Selected columns'. The 'Available columns' list includes Commented, Comments, Date Of Supply, Delivery Number, and Disputed Date. The 'Selected columns' list includes Invoice #, Created Date, Status, PO #, Gross Total, and Unanswered Comments.

coupa supplierportal

SIMON | HELP

Home Invoices Orders Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogues Setup More...

Invoices Uploaded Invoices Invoices Lines Payment Receipts Advanced

Select customer Mitie Group Plc

Create New Data Table View

General

Name

Visibility Only Me Everyone

Start with view All

Conditions

Match Conditions Match all conditions

Filter By Invoice # Filter Clause is Filter Text

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

Create New Data Table View - 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	Selected columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Gross Total
Disputed Date	Unanswered Comments
Document Due Date	Dispute reason
Document Type	Actions
Invoice Date	
Last Updated Date	
Linked document	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	
Processing Failed At	

Create New Data Table View - Columns

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

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

Invoices – New View

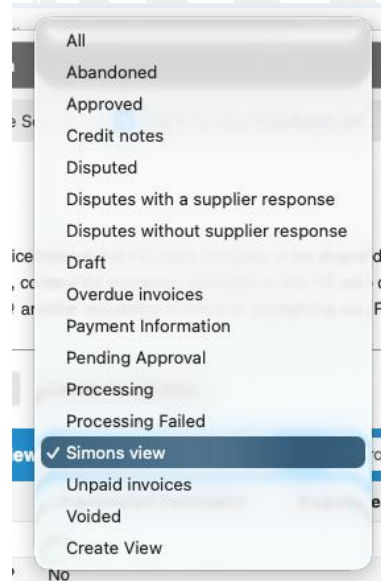
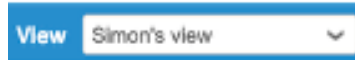
Your new view should be shown on your screen with the columns you selected.

To expand your screen click



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

You will still be able to see all the views by clicking the down arrow



Create Invoices ⓘ

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

Export to View Simon's view Search

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	

Our Dedicated Supplier Website

Mitie has a dedicated supplier website [Mitie Suppliers](#)
You will find lots of How to Guides.

Each section in this document will have reference to How to Guides

Click  **How to Guides** to expand

Introduction to the Coupa Supplier Portal (CSP)

What is the CSP?

The CSP is an easy to setup, free tool for suppliers to manage business with all customers who use Coupa, under one roof. The Coupa platform will provide you with full visibility of the status of your invoice and will enable a quicker process. No installation of hardware or software is required, and the service incurs no fee for you to pay.

How do I login to the portal?

Click on the image below to login to the CSP.

- Bookmark the link/add it to your favourites tab
- The email address used to login should be the same as the primary contact held on Mitie's Vendor Master
- If you already use Coupa with other customers, please provide an email address for your current CSP administrator.



Who can I contact for support?

Please email askmitieprocurement@mitie.com for any support using the CSP, our friendly team are happy to help guide you through the process.

You can also find help and information on the Coupa website, please [click here to visit](#).



How to manage / setup your CSP



Click for How to Guides

- How to register the CSP
- How to register and activate your CSP
- How to setup your legal entity
- How to set-up Two-factor Authentication
- How to update your details on the CSP
- How to manage user or merge requests in your CSP
- How to update Notification settings
- How to manage your preferred language in your CSP

Supplier Maintenance (SMT)

Mitie uses Coupa to manage and onboard new suppliers and undertakes validation checks to ensure our suppliers meet our minimum standards. Existing suppliers can also use Coupa to update, amend and maintain details such as their banking information and remit to address.



- New Suppliers
- Existing Suppliers
- Managing your company information with Mitie

How to Invoice Mitie

Depending on the volume and frequency of transactions there are multiple ways you can invoice via Coupa, you can either choose:

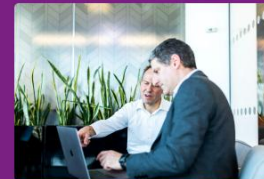
1. The Coupa Supplier Portal
2. Supplier Actionable Notifications (please refer to the how-to-guide below)

Before you invoice Mitie, please ensure that you have read the Tax guides that are listed in the menu below for your country.

Please note that the above guides are changed frequently, so please make sure that you download the most up-to-date version

You must have a Legal entity set up in your CSP to invoice Mitie Group PLC.

If you need further support regarding your invoices e.g. payment status or pending approval. Please email accountspayable@mitie.com



Click for How to Guides

- UK, CIS and VAT Guide
- Cyprus Tax Guide
- Germany VAT Guide
- Gibraltar VAT Guide
- Belgium VAT Guide
- France VAT Guide
- Netherlands VAT Guide
- How to setup your legal entity
- How to setup your business sites in the CSP
- How to submit an invoice by the CSP
- How to submit a credit note by the CSP
- How to Create and Submit an invoice via SAN
- How to manage Disputed Invoices

Contract Lifecycle Management (CLM)

Review Contracts

Coupa Contract Lifecycle Management (CLM) module enables suppliers to review and manage contracts online.



How to Guides

Source to Contract (S2C)

Participate in eAuctions

Coupa eSourcing and eAuctions tools enable Suppliers to interact online with Mitie during the Sourcing and eAuction process.



How to Guides

If you cannot find the help you need, please email askmitieprocurement@mitie.com

Website address: <https://mitiesuppliers.com/mitie-supplier-faq/using-coupa-2/>

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