

Coupa Supplier Portal (CSP) - Invoicing

- I. How to submit an Invoice with a Purchase Order
- II. How to submit an Invoice with multiple PO Lines
- III. How to submit an Invoice with a Contract
- IV. Which Tax Type Should I Use?

Updated January 21,2022 by Thomas Anderson

Coupa Supplier Portal (CSP) - Invoicing

I. How to submit an Invoice with a Purchase Order

1. Log into the **Coupa Supplier Portal**: <https://supplier.coupahost.com/>

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

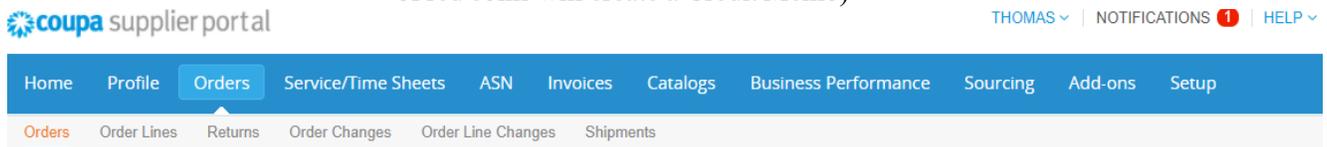
The "Register" section is titled "Register" and has a sub-header "New to Coupa? Create Your Account." It contains four input fields: "First Name", "Last Name", "Company", and "Email". There is a "Register" button at the bottom.

The "Log In" section is titled "Log In" and has a sub-header "Welcome back!". It contains two input fields: "Email Address" (with the value "Jessica.Fernandez+CSPDerr") and "Password" (with masked characters). There is a "Log In" button and a link "Forgot Your Password?" below it.

2. Click on the **Orders** tab



3. Select **Clark Group SAP** from the **Select Customer SAP** drop down to Invoice Clark Construction Group
*Please note if you provided services to both Clark Construction Group and Shirley Contracting, you will have 1 option now under **Clark Group SAP**. Your Clark Construction Group supplier number will begin with a "1" along with your Shirley Contracting supplier number which now will begin with a "1".
4. To Invoice against a Purchase Order, click on the image of yellow coins under **Actions** (clicking the image of red coins will create a Credit Memo)



Select Customer Clark Group TEST

Configure PO Delivery

Purchase Orders

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C00187595	12/07/20	Issued	None	2X4X8' PT LUMBER - SCC	No	5,000.00		

Coupa Supplier Portal (CSP) - Invoicing

5. The **Create Invoice** screen will load

General Info

* Invoice # ✓

* Invoice Date

Payment Term NT30 - within 30 days Due net

* Currency USD

Status Draft

Shipping Term

* Invoice Upload W-9 2019.pdf

Supplier Note

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

From

* Supplier 1001160 - ARC DOCUMENT SOLUTIONS, LLC

* Invoice From Address ARC DOCUMENT SOLUTIONS, LLC
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

* Remit-To Address ARC DOCUMENT SOLUTIONS, LLC
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

* Ship From Address ARC DOCUMENT SOLUTIONS, LLC
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

To

Customer Clark Group QA

* Ship To Address 7500 Old Georgetown Road
Accounting - Bethesda 5th FL
Bethesda, MD 20814-6196
United States
Location Code: 26100145

* SAP Tax Jurisdiction MD000000000 - MD - STATE

* Responsible Company

Lines

Line Level Taxation

Type	Description	Price	
	<input type="text" value="Test Item"/>	<input type="text" value="25.00"/>	25.00
PO Line C00213233-1	Contract <input type="text"/>	Supplier Part Number <input type="text"/>	Tax Type <input type="text" value="Tax Exempt"/>
Billing 1000-1000-Cost Center-26100405			

Coupa Supplier Portal (CSP) - Invoicing

(Cont.) All fields denoted by a red asterisk are required. Header Fields that will require your input are:

- Invoice #
- Invoice Date
- Payment Term
- Invoice Upload (select **Choose File** and attach copy of Invoice)
- Ship to Address
 - Click the magnifying glass
 - Type in the Job Sites Address, click choose
- SAP Tax Jurisdiction – This will auto fill after you choose the correct Job site address
- Requester Email / Name – You must type in the requesters full email address and name
- Responsible Company (The Job can provide this information)

Example of Responsible Companies

- *1000 Clark Construction, 4200 Clark Concrete, 4300 Clark Foundations, 5000 Shirley, 6000 Guy F Atkinson Const*

Subtotal		2,155.00
Shipping		<input type="text"/>
Tax Description (Shipping)	<input type="text"/> <input type="text"/>	0.000
Handling		<input type="text"/>
Tax Description (Handling)	<input type="text"/> <input type="text"/>	0.000
Misc		<input type="text"/>
Tax Description (Misc)	<input type="text"/> <input type="text"/>	0.000
Tax Description	<input type="text"/> <input type="text"/>	0 0
Total Tax		0.00
Total		2,155.00

Sub Header Fields that will require your input are:

- **Shipping** (if applicable)
- **Shipping Tax** (if applicable)
- **Handling** (if applicable)
- **Handling Tax** (if applicable)
- **Misc.** (if applicable)
- **Misc. Tax** (if applicable)
- **Tax Description** (Place the Tax Amount)

6. Once all required fields have been entered, select **Calculate** to verify the **Total** matches your Invoice amount

Coupa Supplier Portal (CSP) - Invoicing

- 7. Select **Submit** and a pop-up message will appear for you to confirm the information you are about to send is correct

Are You Ready to Send?

You're about to send an invoice to **Clark Group** for a total amount of **2,155.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

[Continue Editing](#) [Send Invoice](#)

- 8. Select **Send Invoice** and you will be redirected to the **Invoice** tab where you can view all your Invoices and their Status

coupa supplier portal JESSICA | NOTIFICATIONS 0 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Admin

Select Customer Clark Group

Invoices

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Demo Invoice 1	07/23/17	Processing	C00001357	2,155.00	No	

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No Contract Invoice Against Contract [Create](#) [Credit note](#)

Coupa Supplier Portal (CSP) - Invoicing

II. How to submit an Invoice with Multiple PO Lines

1. Log into the **Coupa Supplier Portal**: <https://supplier.coupahost.com/>

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, there are two main sections: "Register" and "Log In".

The "Register" section is titled "New to Coupa? Create Your Account." and contains the following fields: "First Name", "Last Name", "Company", and "Email". There is a "Register" button at the bottom of this section.

The "Log In" section is titled "Welcome back!" and contains the following fields: "Email Address" (with the value "Jessica.Fernandez+CSPDerr") and "Password". There is a "Log In" button and a link for "Forgot Your Password?" below the password field.

2. Click on the **Orders** tab

The screenshot shows the Coupa Supplier Portal navigation menu. The "Orders" tab is highlighted with a yellow circle. The menu items are: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the main menu, there are sub-menu items: Orders, Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. In the top right corner, there are links for "THOMAS", "NOTIFICATIONS" (with a red notification icon), and "HELP".

3. Select **Clark Group SAP** from the **Select Customer SAP** drop down to Invoice Clark Construction Group
*Please note if you provided services to both Clark Construction Group and Shirley Contracting, you will have 1 option now under **Clark Group SAP**. Your Clark Construction Group supplier number will begin with a "1" along with your Shirley Contracting supplier number which now will begin with a "1".

of red coins will create a Credit Memo)

The screenshot shows the Coupa Supplier Portal interface with the "Orders" tab selected. The navigation menu is the same as in the previous screenshot. In the top right corner, there are links for "THOMAS", "NOTIFICATIONS" (with a red notification icon), and "HELP".

Select Customer

Clark Group TEST

Configure PO Delivery

Purchase Orders

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
C00187595	12/07/20	Issued	None	2X4X8' PT LUMBER - SCC	No	5,000.00		

Coupa Supplier Portal (CSP) - Invoicing

5. The **Create Invoice** screen will load

 **General Info**

* Invoice # ✓

* Invoice Date 

Payment Term NT30 - within 30 days Due net

* Currency USD

Status Draft

Shipping Term ▼

* Invoice Upload W-9 2019.pdf

Supplier Note

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

 **From**

* Supplier 1001160 - ARC DOCUMENT SOLUTIONS, LLC

* Invoice From Address 
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

* Remit-To Address 
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

* Ship From Address 
1429 JEFFREY DR ADDISON
ADDISON, IL 60101
United States

 **To**

Customer Clark Group QA

* Ship To Address 
Accounting - Bethesda 5th FL
Bethesda, MD 20814-6196
United States
Location Code: 26100145

* SAP Tax Jurisdiction MD000000000 - MD - STATE

* Responsible Company 

 **Lines** Line Level Taxation

Type	Description	Price	
	<input type="text" value="Test Item"/>	<input type="text" value="25.00"/>	25.00 
PO Line C00213233-1	Contract <input type="text" value=""/>	Supplier Part Number <input type="text" value=""/>	Tax Type <input type="text" value="Tax Exempt"/> ▼
Billing 1000-1000-Cost Center-26100405			

(Cont.) All fields denoted by a red asterisk are required. Header Fields that will require your input are:

- Invoice #
- Invoice Date
- Payment Term
- Invoice Upload (select **Choose File** and attach copy of Invoice)
- SAP Tax Jurisdiction – This will auto fill after you choose the correct Job site address

Coupa Supplier Portal (CSP) - Invoicing

6. Add the invoiced amount to the Purchase Order line you are billing against
 - a. Remove the Purchase Order line you are billing against
 - b. This does not affect the Original Purchase Order
 - c. Click the **X**

☰ Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	TEST PO	1.00	Each	450.00	5,000.00
PO Line C00254505-1		Contract ▼		Supplier Part Number <input type="text"/>	Tax Type Sales Tax ▼
Billing 1000-1000-Cost Center-26100405					

Type	Description	Qty	UOM	Price	
	TEST PO	1.00	Each	5,000.00	5,000.00
PO Line C00254505-2		Contract ▼		Supplier Part Number <input type="text"/>	Tax Type Sales Tax ▼
Billing 1000-1000-Cost Center-26100405					

Add Line Pick lines from Contract

Totals & Taxes

7. Line is removed

☰ Lines Line Level Taxation

1	Type	Description	Qty	UOM	Price	
		TEST PO	1.00	Each	450.00	450.00
	PO Line C00254505-1		Contract ▼		Supplier Part Number <input type="text"/>	Tax Type Sales Tax ▼
Billing 1000-1000-Cost Center-26100405						

Add Line Pick lines from Contract

Totals & Taxes

Coupa Supplier Portal (CSP) - Invoicing

Subtotal			2,155.00
Shipping			<input type="text"/>
Tax Description (Shipping)	<input type="text"/>	<input type="text"/>	0.000
Handling			<input type="text"/>
Tax Description (Handling)	<input type="text"/>	<input type="text"/>	0.000
Misc			<input type="text"/>
Tax Description (Misc)	<input type="text"/>	<input type="text"/>	0.000
Tax Description	<input type="text"/>	0	0
Total Tax			0.00
Total			2,155.00

Sub Header Fields that will require your input are:

- **Shipping** (if applicable)
- **Shipping Tax** (if applicable)
- **Handling** (if applicable)
- **Handling Tax** (if applicable)
- **Misc.** (if applicable)
- **Misc. Tax** (if applicable)
- **Tax Description** (Place the Tax Amount)

Once all required fields have been entered, select **Calculate** to verify the **Total** matches your Invoice amount

Coupa Supplier Portal (CSP) - Invoicing

8. Select **Submit** and a pop-up message will appear for you to confirm the information you are about to send is correct

Are You Ready to Send?

You're about to send an invoice to **Clark Group** for a total amount of **2,155.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

[Continue Editing](#) [Send Invoice](#)

9. Select **Send Invoice** and you will be redirected to the **Invoice** tab where you can view all your Invoices and their Status

 JESSICA | NOTIFICATIONS 0 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Admin

Select Customer Clark Group

Invoices

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Demo Invoice 1	07/23/17	Processing	C00001357	2,155.00	No	

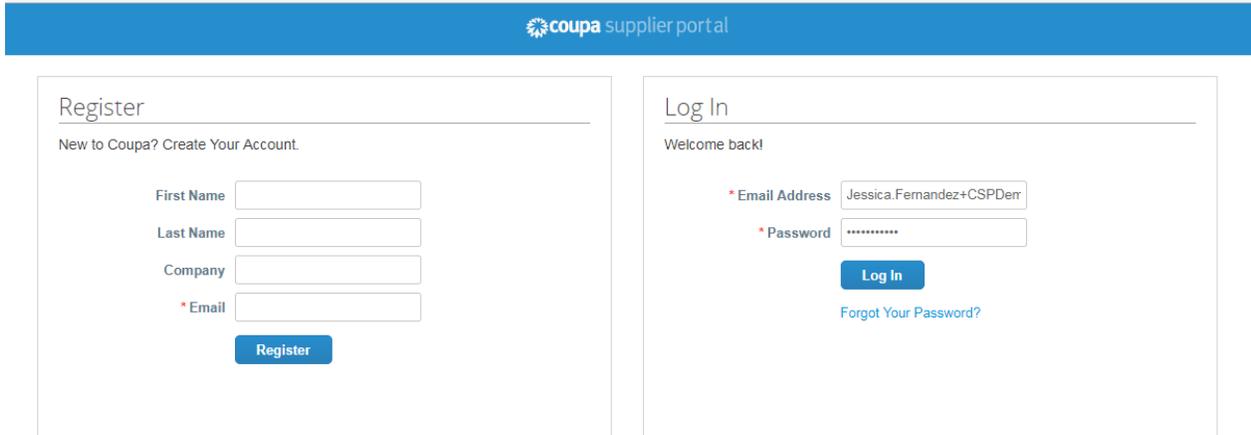
Per page 15 | 45 | 90

No Contract Invoice Against Contract [Create](#) [Credit note](#)

Coupa Supplier Portal (CSP) - Invoicing

III. How to submit an Invoice with a Contract

1. Log into the **Coupa Supplier Portal**: <https://supplier.coupahost.com/orders>

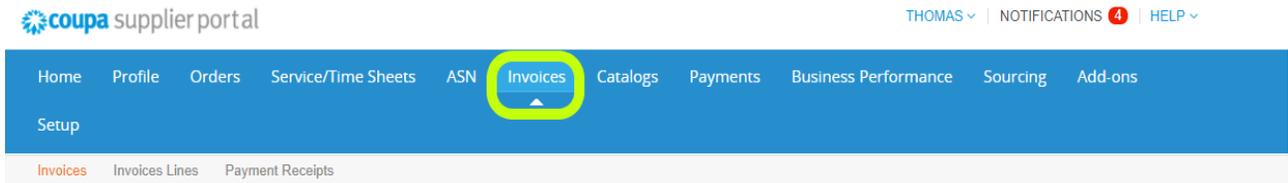


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The "Register" section is titled "Register" and has the sub-header "New to Coupa? Create Your Account." It contains four input fields: "First Name", "Last Name", "Company", and "* Email". Below these fields is a blue "Register" button.

The "Log In" section is titled "Log In" and has the sub-header "Welcome back!". It contains two input fields: "* Email Address" (with the value "Jessica.Fernandez+CSPDerr") and "* Password" (with masked characters "*****"). Below these fields is a blue "Log In" button and a link "Forgot Your Password?".

2. Click on the **Orders** tab



The screenshot shows the navigation menu of the Coupa Supplier Portal. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". On the right side of the header, there is a user profile "THOMAS" with a dropdown arrow, a "NOTIFICATIONS" icon with a red circle containing the number "4", and a "HELP" link with a dropdown arrow.

Below the header is a blue navigation bar with the following tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Payments", "Business Performance", "Sourcing", and "Add-ons". The "Invoices" tab is highlighted with a yellow circle and has a small upward-pointing arrow below it.

Below the navigation bar is a "Setup" section with the following links: "Invoices", "Invoices Lines", and "Payment Receipts". The "Invoices" link is underlined.

Coupa Supplier Portal (CSP) - Invoicing

3. Select **Clark Group SAP** from the **Select Customer SAP** drop down to Invoice Clark Construction Group
*Please note if you provided services to both Clark Construction Group and Shirley Contracting, you will have 1 option now under **Clark Group SAP**. Your Clark Construction Group supplier number will begin with a “1” along with your Shirley Contracting supplier number which now will begin with a “1”. Select the **Create Blank Invoice** radio button.

4. To Invoice against a Coupa Contract, click on the **Create Invoice from Contract** button

Create Invoices 

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

5. Select a Contract

- Click on Create

Select Contract 

Select a Contract

C-PTEST-012122-DUP  

Cancel **Create**

Coupa Supplier Portal (CSP) - Invoicing

6. The **Create Invoice** screen will load

General Info

*** Invoice #** PTESTCONT

*** Invoice Date** 01/31/22

Payment Term NT20 - within 20 days due net

*** Currency** USD

Status Draft

Shipping Term

Contract C-PTEST-012122-DUP

*** Invoice Upload** Test INV.pdf

Supplier Note

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

From

*** Supplier** 1000955 - PARAMOUNT PEST SERVICES

Supplier Tax ID

*** Invoice From Address** PARAMOUNT PEST SERVICES QA
7500 OLD GERORGETOWN RD
BETHESDA, MD 20814
United States

*** Remit-To Address** PARAMOUNT PEST SERVICES QA
7500 OLD GERORGETOWN RD
BETHESDA, MD 20814
United States

*** Ship From Address** PARAMOUNT PEST SERVICES QA
7500 OLD GERORGETOWN RD
BETHESDA, MD 20814
United States

To

Customer Clark Group QA

*** Ship To Address** 21306 Upgrade street
San Mateo, CA 11111
United States
Location Code: 20110N1

*** SAP Tax Jurisdiction** MD031000000 - MD-MONTGOMERY COUNTY - 6.0%

*** Requester Email**

*** Requester Name**

*** Responsible Company**

Lines

Line Level Taxation

Type	Description	Price	
<input type="text" value="Amt"/> <input type="text" value="v"/>	<input type="text" value="TEST ITEM"/>	<input type="text" value="500.00"/>	<input type="text" value="0.00"/> <input checked="" type="checkbox"/>
PO Line	Supplier Part Number	Tax Type	
None	<input type="text"/>	<input type="text"/>	

Coupa Supplier Portal (CSP) - Invoicing

(Cont.) All fields denoted by a red asterisk are required. Header Fields that will require your input are:

- **Invoice #**
- **Invoice Date**
- **Payment Term**
- **Invoice Upload** (select **Choose File** and attach copy of Invoice)
- **Ship To Address** - Click the magnifying glass
 - Type in the Job Sites Address, click choose
- **SAP Tax Jurisdiction** – This will auto fill after you choose the correct Job site address
- **Please add the Clark POC for the Requester Email and Requester Name**
 - Location Code (*Job or Dept Number*)
 - Requestor Name (*Your Clark/Atk/Shirley POC*)
 - Requestor Email (*Your Clark/Atk/Shirley POC*)
 - Responsible Company Code (*Clark/ATK/Shirley Company Code*)

Example of Responsible Companies - 1000 Clark Construction, 4200 Clark Concrete, 4300 Clark Foundations, 5000 Shirley, 6000 Guy F Atkinson Const

- Be sure the **Tax Type** field says Tax Exempt (*Only if the work is non-taxable*)

Subtotal		2,155.00
Shipping		<input type="text"/>
Tax Description (Shipping)	<input type="text"/> <input type="text"/>	0.000
Handling		<input type="text"/>
Tax Description (Handling)	<input type="text"/> <input type="text"/>	0.000
Misc		<input type="text"/>
Tax Description (Misc)	<input type="text"/> <input type="text"/>	0.000
Tax Description	<input type="text"/> <input type="text"/>	0 0
Total Tax		0.00
Total		2,155.00

Sub Header Fields that will require your input are:

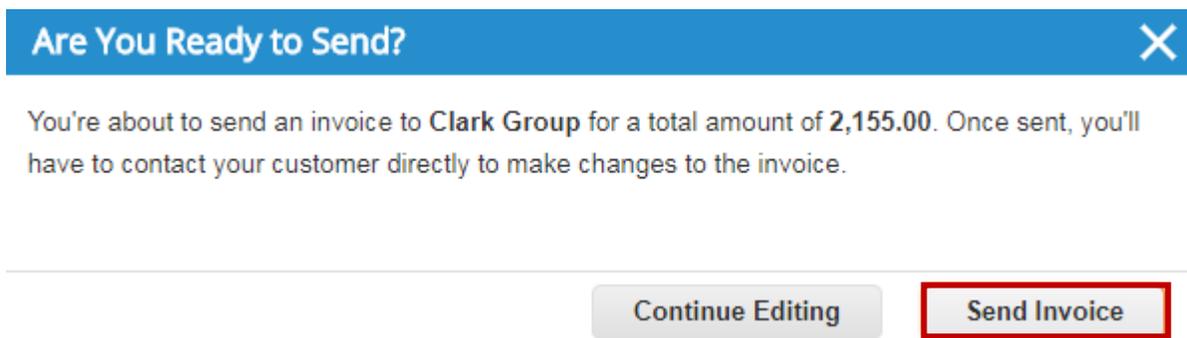
- **Shipping** (if applicable)
- **Shipping Tax** (if applicable)
- **Handling** (if applicable)
- **Handling Tax** (if applicable)
- **Misc.** (if applicable)
- **Misc. Tax** (if applicable)
- **Tax Description** (**Place the Tax Amount**)

Coupa Supplier Portal (CSP) - Invoicing

7. Once all required fields have been entered, select **Calculate** to verify the **Total** matches your Invoice amount



8. Select **Submit** and a pop-up message will appear for you to confirm the information you are about to send is correct



9. Select **Send Invoice** and you will be redirected to the **Invoice** tab where you can view all your Invoices and their Status

coupa supplier portal THOMAS ▾ | NOTIFICATIONS 4 | HELP ▾

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

Setup

Invoices Invoices Lines Payment Receipts

Select Customer Clark Group QA ▾

Invoices

Instructions From Customer

- 1) Create Invoice from PO
- 2) Type in your Invoice# (Please limit to 25 characters)
- 3) Please attach your invoice file under "Invoice Upload"
- 4) Responsible Business Unit is now Responsible Company (The first 4-digit code in the Billing Section)
- 5) For each line item enter/double check:
 - a) Tax Type - Sales Tax - Tax Exempt

**Line Level Taxation - If invoicing with multiple tax types (e.g. sales, exempt), the Line Level Taxation checkbox must be checked to properly distribute the tax for each line item.

Need additional assistance? Please visit: <https://clarkconstruction.com/suppliers>

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 #	Total	Unanswered Comments	Dispute Reason	Actions
PTESTCONT	01/31/22	Pending Approval ✓	None	500.00	No		

Coupa Supplier Portal (CSP) - Invoicing

IV. Which tax Type Should I Use?

Sales Tax – Tangible goods.

Tax Exempt (1) - Those materials that are to be physically incorporated into and made a part of real property. NOTE: The purchase of consumables (e.g., supplies and tangible personal property not incorporated into the property) and equipment rentals are subject to tax on all projects.

Tax Exempt (2) - Intangibles such as services.

Use Tax - Tangible good but Sales Tax is not being charged by the Supplier, tax is accrued by Clark Group, and submitted with State tax filings.

Line Level Taxation - If multiple types of tax are included on an invoice, then the Line Level Taxation check box must be checked to properly distribute the tax on the line-item level.

***NOTE:** Each State has unique Sales Tax requirements. If you have any questions about the state a jobsite in discuss with your tax professional.