



# Flipping a PO into an invoice

Coupa Supplier Portal (CSP) training

Powered Procurement

KPMG

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2019

# Flipping a PO into an invoice

**01** Viewing and acknowledging a Purchase Order (PO)

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**02** Flipping a Purchase Order into an invoice

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# Viewing and acknowledging a PO

# Viewing a PO

When KPMG issues a Purchase Order you will receive a **notification** in the CSP. You will be able to view the purchase order directly in the CSP under the **Orders** section.

The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". A navigation bar contains several menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The "Orders" menu item is highlighted with a red box. Below the navigation bar, the user's name "TEST EW" is visible. To the right, a dropdown menu for "NOTIFICATIONS" is open, showing three notifications: "A new order is received" for PO K000125 (£490.00), PO K000123 (£500.00), and PO K000121 (£800.00), all issued by KPMG LLP DEV. The "NOTIFICATIONS" header in the dropdown is also highlighted with a red box. Below the notifications is a "See All Notifications" link. The main content area includes a globe icon, a list of profile links (About, Industry, Website, Established, Employees), and an "Improve Your Profile" button. A "Latest Customers" section is partially visible at the bottom right, showing "KPMG LLP DEV".


# Viewing a PO


Primary Social Promotions

KPMG LLP DEV 2 New PO - Purchase Order #K000125 Powered by Coupa Software Hi Eva, This is PO #K000125 Submitted By Eva Wang Supplier TEST Supplier EW Total 4... 09:50


If you enable email notification for POs, you will receive an **email notification** for the new PO.

Open the email and click **View Order**. This will open the CSP - where you can view the PO.

 **KPMG LLP DEV** <do\_not\_reply@kpmg-uk-dev.coupahost.com>  
to me ▾

 Purchase Order #K000125

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Powered by 

Hi Eva,

This is **PO #K000125**

Submitted By Eva Wang  
Supplier TEST Supplier EW  
Total **490.00 GBP**

Items	<b>test supplier ew 9</b>	7 @ 70.00	<b>490.00</b> GBP
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[View Order](#)

# Viewing a PO

1. **Status:** The status of the PO.
2. **Order Date:** The date that the PO was created.
3. **Revision Date:** Date the PO was revised. If the PO does not have any revisions this will be the same as the Order Date.
4. **Requester:** The name of the Requester.
5. **Email:** The E-mail address of the Requester.
6. **Payment Term:** Payment term.
7. **Attachments:** Attachment from Requester.
8. **Acknowledged:** Allows you to acknowledge the purchase order

Select Customer KPMG LLP DEV Configure PO Delivery

## Purchase Order #K000125

<b>Status</b>	Issued - Pending Manual	<b>Shipping</b>	
<b>Order Date</b>	05/01/19	<b>Ship-To Address</b>	Botanic House 100 Hills Road Cambridge CB2 1AR United Kingdom Attn: Eva Wang
<b>Revision Date</b>	05/01/19	<b>Terms</b>	Delivered
<b>Requester</b>	Eva Wang		
<b>Email</b>	Eva.Wang@kpmg.co.uk		
<b>Payment Term</b>	ZB30-Within 30 days w/o deduction		
<b>Attachments</b>	None		
<b>Acknowledged</b>	<input type="checkbox"/>		

9. **Shipping:** The ship-to address.
10. **Terms:** Shipping terms.
11. **Select Customer:** The name of the customer that sent that PO.

# Viewing a PO

12. **Lines:** Line-level information for each item.

13. **Print View:** Allows you to view the print view of the PO.

14. **Add Comment:** Allows you to add comments to KPMG LLP.

15. **Create Invoice:** Allows you to flip the PO to an invoice.

The screenshot shows a web interface for viewing a Purchase Order (PO). At the top left, a tab labeled "Lines" is highlighted with a red box. Below this is a table with columns: Type, Item, Qty, Unit, Price, Total, and Invoiced. The first row shows a quantity of 7 units at a price of 70.00, totaling 490.00. Below the table, a "Need By" date of 05/31/19 and "Part Number" of None are displayed. A summary box shows a total of 490.00 GBP. A row of buttons includes "Create Invoice", "Save", and "Print View", with the entire row highlighted by a red box. At the bottom, a "Comments" section is visible, and an "Add Comment" button is highlighted with a red box.

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		test supplier ew 9	7	Each	70.00	490.00	0.00

Need By: 05/31/19 | Part Number: None

Total: 490.00 GBP

Per page: 15 | 45 | 90


Buttons: Create Invoice, Save, Print View

Comments: 0

Add Comment

# Viewing a PO

Clicking on **Print View** will allow you to view a print friendly version of the PO - which will also include terms and conditions.

 **TCS Test**

PO NUMBER: K000266  
DATE: 11/06/2019  
SHIPPING TERMS: Delivered  
CURRENCY: GBP  
CONTACT: Kasimir Milennas  
Kasimir.Milennas@kpmg.co.uk

**Ship To**  
KPMG LLP DEV  
37 Albyn Place  
Aberdeen, AB10 1JB  
United Kingdom  
Attn: Kasimir Milennas

**Bill To**  
KPMG LLP DEV  
15 Canada Square  
London, E14 5GL  
United Kingdom

This Purchase Order is issued by KPMG LLP ("KPMG"). Please quote the above Purchase Order number on all related correspondence, documentation and packaging.

All prices shown are net of VAT

Please refer to Terms and Conditions, Invoicing and other instructions below.

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Executive Chair Black	30/06/2019	1	Each	49.99	49.99
						<b>49.99 GBP</b>

**Terms and Conditions**  
Where a contract reference is shown above this Purchase Order shall be governed by the terms and conditions of the contract referenced.  
Where no contract reference is shown above this Purchase Order shall be governed by the latest version of KPMG's Conditions of Purchase which can be downloaded from [www.kpmg.co.uk](http://www.kpmg.co.uk) and which the Supplier acknowledges it has read and accepted as a condition of providing the specified goods and/or services.

**Invoicing Instructions**  
KPMG requires invoices to be submitted by one of the following methods:  
(1) Supplier Actionable Notice (SAN), (2) Coupa Supplier Portal (CSP) or (3) oXML, as agreed between the parties.  
Invoices shall not be accepted by other methods or in other formats.  
Invoices not showing KPMG's Purchase Order number may be held and/or returned to the Supplier.

**Queries**  
Any queries regarding this Purchase Order should be directed in the first instance to KPMG's contact whose details are set out above.

Partnership Reg. Name: KPMG LLP  
Partnership Reg. Number: OC301540  
Registered Address: 15 Canada Square, Canary Wharf, London, E14 5GL





# Acknowledging a PO

To acknowledge the PO, click the **Acknowledged** checkbox.

## Purchase Order #K000125

Order marked as sent manually and acknowledged



**Status** Issued - Pending Manual

**Order Date** 05/01/19

**Revision Date** 05/01/19

**Requester** Eva Wang

**Email** Eva.Wang@kpmg.co.uk

**Payment Term** ZB30-Within 30 days w/o deduction

**Attachments** None

**Acknowledged**

### Shipping

**Ship-To Address** Botanic House  
100 Hills Road  
Cambridge  
CB2 1AR  
United Kingdom  
Attn: Eva Wang

**Terms** Delivered

# Acknowledging a PO: Adding comments

To add a comment for KPMG LLP, enter your comment in the **Comments box** at the bottom of your PO and then click **Add Comment**.

Comments

Hi, can you specify the colour that you want?

Add Comment

When KPMG LLP responds, you will receive a **notification** in your email and CSP and will also be able to see their response here. All comments entered here will be viewable to KPMG LLP.

coupa supplier portal

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

Orders Order Lines

Select Customer

Purchase Orders

EVA NOTIFICATIONS 7 HELP


- A new comment is received  
New comment from KPMG LLP DEV on
- A new order is received  
New PO K000125 for £490.00 issued by KPMG LLP DEV.
- A new order is received  
New PO K000123 for £500.00 issued by KPMG LLP DEV.

See All Notifications

Primary	Social	Promotions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
☆ KPMG LLP DEV	Comment on Purchase Order #125 - FYI: New Purchase Order comment Powered by Coupa Software Hi Eva, There is a new comment from Eva Wang on ...	00:09
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
☆ KPMG LLP DEV	New Comment on Purchase Order for KPMG LLP DEV - New comment from KPMG LLP DEV on Purchase Order #K000125 Powered by Coupa Software Ev...	00:09

# Acknowledging a PO: Adding comments

The comment history can be found in the **Comments** section at the bottom of the PO


 Comments ▼

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**Add Comment**

**Participants:** Eva Wang

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 **Eva Wang** On 05/02/19 at 12:09 AM

All in black please. Thank you.

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**Eva Wang** On 05/02/19 at 12:02 AM

Hi, can you specify the colour that you want?



# Flipping a PO into an invoice

# Creating invoices: Flipping a PO into an invoice

1. Click on the **Orders** tab.

2. Search for the purchase order to be invoiced and click on the **gold coin stack icon** to create the invoice.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Below the navigation bar, there's a 'Select Customer' dropdown menu set to 'KPMG LLP DEV' and a 'Configure PO Delivery' button. The main content area is titled 'Purchase Orders' and contains an 'Instructions From Customer' section with the text 'Test PO instructions for suppliers'. Below this, there's a prompt: 'Click the Action to Invoice from a Purchase Order'. A table of purchase orders is displayed with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The row for PO number K000125 is highlighted, and the 'Actions' column for that row shows a gold coin stack icon with a 'Create invoice' tooltip (highlighted with a red box).

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
K000134	05/02/19	Issued	05/02/19	8 Each of test supplier ew 9	No	320.00 GBP	
K000125	05/01/19	Issued	05/01/19	7 Each of test supplier ew 9	Yes	490.00 GBP	Create invoice
K000123	05/01/19	Issued	None	10 Each of test supplier ew 8	No	500.00 GBP	
K000121	04/30/19	Issued	None	8 Each of test supplier EW 7	No	800.00 GBP	
K000120	04/30/19	Issued	None	10 Each of test supplier EW 5	No	3,000.00 GBP	
K000117	04/30/19	Issued	04/30/19	20 Each of test 3	No	1,000.00 GBP	
K000102	04/24/19	Issued	None	10 Each of Test supplier EW 2	No	500.00 GBP	
K000101	04/24/19	Issued	None	10 Each of Test Supplier EW 1	No	1,000.00 GBP	

# Creating invoices: Flipping a PO into an invoice

- Complete header level fields. Please ensure that the information used to generate the invoice from Coupa is the same data from your own ERP system.

**Invoice # (No.):** Enter the invoice number generated in your own ERP system.

**Invoice Date:** Today (or backdated up to 60 days).

**Payment Terms:** The payment terms from the PO.

**Currency:** The currency from the PO.

**Status:** Current status of this invoice.

**Image Scan:** Please do **NOT** attach a copy of an invoice from your system. As per the T&Cs agreed, Coupa will issue the legal invoice on your behalf.

## Please NOTE:

- Invoices backdated beyond 60 days will be on hold and disputed if needed.
- For compliant invoicing countries, it is technically not possible to future date invoices.
- For non-compliant invoicing countries, it is technically possible to future date invoices, but will be auto disputed.

### General Info

\* Invoice #

\* Invoice Date 05/02/19

Payment Term ZB30-Within 30 days w/o deduction

Date of Supply 05/02/19

\* Currency GBP

Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

Attachments  |  |

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

### From

\* Supplier TEST Supplier EW

\* Supplier VAT ID GB112345678

\* Invoice From Address Test Supplier EW   
1 test  
Bristol  
1X 2XX  
United Kingdom  
limited

\* Remit-To Address Test Supplier EW   
1 test  
Bristol  
1X 2XX  
United Kingdom

\* Ship From Address Test Supplier EW   
1 test  
Bristol  
1X 2XX  
United Kingdom

### To

Customer KPMG LLP DEV

\* Bill To Address KPMG LLP  
15 Canada Square  
London  
E14 5GL  
United Kingdom

\* Buyer VAT ID GB791788859

Ship To Address Botanic House  
100 Hills Road  
Cambridge  
CB2 1AR  
United Kingdom

# Creating invoices: Flipping a PO into an invoice

**Supplier Note:** Enter any notes for KPMG LLP.

**Attachments:** Attach supporting documentation; all types of attachments are supported. If requested by KPMG LLP, please upload your breakdown of costs in the agreed Coupa format here (Excel).

**Cash Accounting Scheme:** Leave blank if not relevant.

**Early Payment Provisions:** Leave blank if not relevant.

**Margin Scheme:** Leave blank if not relevant.

### General Info

\* Invoice #

\* Invoice Date

Payment Term ZB30-Within 30 days w/o deduction

Date of Supply

\* Currency

Delivery Number

Status Draft

Image Scan  No file chosen

Supplier Note

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

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

### From

\* Supplier TEST Supplier EW

\* Supplier VAT ID

\* Invoice From Address    
1 test  
Bristol  
1X 2XX  
United Kingdom  
limited

\* Remit-To Address    
1 test  
Bristol  
1X 2XX  
United Kingdom

\* Ship From Address    
1 test  
Bristol  
1X 2XX  
United Kingdom

### To

Customer KPMG LLP DEV

\* Bill To Address    
15 Canada Square  
London  
E14 5GL  
United Kingdom

\* Buyer VAT ID

Ship To Address    
100 Hills Road  
Cambridge  
CB2 1AR  
United Kingdom

# Creating invoices: Flipping a PO into an invoice

**Supplier:** Your company name.

**Supplier VAT ID:** Choose the VAT ID that you set up in the **E-invoicing** section in **Admin**. If you have multiple VAT registrations please ensure you choose the correct VAT registration based on the Country you have supplied your goods or services. Coupa will have different invoicing rules based on the Country of the VAT registration that you have selected for the invoice (and in line with the VAT law of that country).

**Invoice From Address:** Choose the **Invoice From Address** that you set up in your **E-invoicing** section in **Admin** for this invoice.

**Remit-To Address:** Choose the **Remit-To Address** that you set up in your **E-invoicing** section in **Admin** for this invoice.

**Ship From Address:** Choose the **Ship From address** that you set up in your **E-invoicing** section in **Admin** for this invoice. If you have multiple, please ensure it is the correct address which relates to where the goods are shipped from for this specific transaction.

**Customer:** This will always default to KPMG LLP.

The screenshot shows the 'General Info' and 'From' sections of the Coupa invoice creation interface. The 'General Info' section includes fields for Invoice #, Invoice Date (05/02/19), Payment Term (ZB30-Within 30 days w/o deduction), Date of Supply (05/02/19), Currency (GBP), Delivery Number, Status (Draft), Image Scan (Choose file), and Supplier Note. The 'From' section includes fields for Supplier (TEST Supplier EW), Supplier VAT ID (GB112345678), Invoice From Address (Test Supplier EV, 1 test, Bristol, 1X 2XX, United Kingdom, limited), Remit-To Address (Test Supplier EV, 1 test, Bristol, 1X 2XX, United Kingdom), and Ship From Address (Test Supplier EV, 1 test, Bristol, 1X 2XX, United Kingdom). The 'To' section includes Customer (KPMG LLP DEV), Bill To Address (KPMG LLP, 15 Canada Square, London, E14 5GL, United Kingdom), Buyer VAT ID (GB791788859), and Ship To Address (Botanic House, 100 Hills Road, Cambridge, CB2 1AR, United Kingdom).



# Creating invoices: Flipping a PO into an invoice

**Bill to Address:** The **Bill To** address from the PO.

**Buyer VAT ID:** KPMG LLP VAT ID.

**Ship To Address:** The **Ship To** address from the PO.

**Please NOTE:** You can add multiple **From** info in the **E-Invoicing** section under **Admin** and select these options by clicking the **search icon**.

General Info	From
* Invoice # <input type="text"/>	* Supplier TEST Supplier EW
* Invoice Date 05/02/19 <input type="text"/>	* Supplier VAT ID GB112345678 <input type="text"/>
Payment Term ZB30-Within 30 days w/o deduction	* Invoice From Address Test Supplier EW <input type="text"/>
Date of Supply 05/02/19 <input type="text"/>	1 test
* Currency GBP <input type="text"/>	Bristol
Delivery Number <input type="text"/>	1X 2XX
Status Draft	United Kingdom
Image Scan <input type="button" value="Choose file"/> No file chosen	limited
Supplier Note <input type="text"/>	* Remit-To Address Test Supplier EW <input type="text"/>
Attachments <input type="button" value="Add File"/>   <input type="button" value="URL"/>   <input type="button" value="Text"/>	1 test
Cash Accounting Scheme <input type="text"/>	Bristol
Early Payment Provisions Use N/A if not relevant <input type="text"/>	1X 2XX
Margin Scheme <input type="text"/>	United Kingdom
	* Ship From Address Test Supplier EW <input type="text"/>
	1 test
	Bristol
	1X 2XX
	United Kingdom
	<b>To</b>
	Customer KPMG LLP DEV
	* Bill To Address KPMG LLP
	15 Canada Square
	London
	E14 5GL
	United Kingdom
	* Buyer VAT ID GB791788859 <input type="text"/>
	Ship To Address Botanic House
	100 Hills Road
	Cambridge
	CB2 1AR
	United Kingdom

# Creating invoices: Flipping a PO into an invoice

4. Complete line level information. Here you may edit the **Quantity/Price** if you are sending a partial invoice.

You can also add additional lines by clicking on **Add Line** or delete lines by clicking on the delete icon.

5. You will need to add **Taxes** by adding a **VAT Rate** for each line level item.

**Please NOTE:** it is important the VAT rate is an accurate determination of the line item description and invoice place of supply. This should be something that can be copied from your ERP system.

The screenshot shows a software interface for creating an invoice line. At the top, a tab labeled "Lines" is highlighted with a red box. Below it is a table with columns: Type, Description, Qty, UOM, and Price. The "Price" column contains the value "490.00" with a red box around it and a red "X" icon. The "Description" field contains "test supplier ew 9", "Qty" is "7", and "UOM" is "Each". Below the table, there are fields for "PO Line" (K000125-1), "Contract" (TEST Contract EW), and "Supplier Part Number". Under "Billing", the value is "3--CC2-1010101". A "Taxes" section contains a "VAT Rate" dropdown menu (highlighted with a red box), a "VAT Amount" field with "0.00", and a "Tax Reference" field. At the bottom left, there is a "+ Add Line" button (highlighted with a red box) and an "Add Tag" button. At the bottom right, there is a "Totals & Taxes" label.

# Creating invoices: Flipping a PO into an invoice

6. After adding **VAT Rate** for all the line level items click **Calculate**. This will then work out the new total.

PO Line: K000147-2

Billing: 3--CC2-1010101

VAT Rate	VAT Amount	Tax Reference
<input type="text"/>	0.00	<input type="text"/>

Totals & Taxes

Lines Net Total	680.00
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Please **Note**: If applicable, all **Shipping Costs** should be communicated with the requestor upfront. The requestor will insert a line level item for the shipping cost on the PO. You can then flip that PO into an invoice with a line of shipping charge and complete the **VAT Rate** for the shipping to this line and invoice against it.

You should **NOT** add a new line for shipping cost while creating the invoice, as this will cause failure in the auto-matching of the PO and the invoice, putting your invoice on hold and delaying your payment.

Totals & Taxes

Lines Net Total	490.00
Lines VAT Totals	0.00
<hr/>	
Total VAT	0.00
Net Total	490.00
<b>Gross Total</b>	<b>490.00</b>

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

# Creating invoices: Flipping a PO into an invoice

7. To add a comment for KPMG LLP, enter your comment in the **Comments box** and then click on **Add Comment**.

When KPMG LLP responds, you will receive a notification and will also be able to see their response here.

All comments entered will be viewable to KPMG LLP. The comment function for invoices is the same as it for PO that you can find on pages 10 & 11.

If you want to save the invoice for later, click **Save as draft**. If you are ready to submit the invoice, click **Submit** and then click **Send Invoice** in the pop-up confirmation window.

The screenshot displays the Coupa invoice creation interface. At the top right, the 'Totals & Taxes' section shows the following values:

Totals & Taxes	
Lines Net Total	490.00
Lines VAT Totals	0.00
<hr/>	
Total VAT	0.00
Net Total	490.00
<b>Gross Total</b>	<b>490.00</b>

Below the totals, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. The 'Save as Draft' and 'Submit' buttons are highlighted with red boxes. Below the buttons is a 'Comments' section with a red box around the 'Comments' label. A pop-up dialog titled 'Are You Ready to Send?' is open, with a red box around the 'Add Comment' button. The dialog contains the text: '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.' At the bottom of the dialog are 'Continue Editing' and 'Send Invoice' buttons, with the 'Send Invoice' button highlighted by a red box.



Thank you



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

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