

Invoices FAQ

How do I create an invoice?

On the main menu, click on the **Orders** tab. If you are connected to more than one Coupa customer, select their name from the **Select Customer** dropdown menu. In the PO table that appears, choose the PO you want to invoice, and then click on the yellow coins to create an invoice. For more information, see [Coupa Supplier Portal](#).

If you don't have a PO and your customer has given you permission to create invoices without a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Blank Invoice** button above the **Invoices** table.

If you don't have a PO and your customer has given you permission to create invoices with a backing document, click on the **Invoices** tab on the main menu. Click on the **Create Invoice from Contract** button above the **Invoices** table.

For more information, see [Create or Edit an Invoice](#).

How do I create an invoice that isn't backed by a purchase order?

To create a non-PO backed invoice, click on the **Invoices** tab on the main menu. If you are connected to more than one Coupa customer, select their name from the **Select Customer** dropdown menu. Click on the **Create Blank Invoice** button above the **Invoices** table. For more information, see [Create or Edit an Invoice](#).

Note: If you don't see the **Create Blank Invoice** button, contact your customer and ask them to configure your supplier account so that you can submit invoices without a backing PO.

How do I submit an invoice?

Your account needs to be configured to handle invoices through your customer's Coupa instance. Contact them to get set up with an invoicing method.

What options are available for me to submit invoices to my customers?

You should talk to your customer about which of the following methods they want to use:

- The CSP, where you sign in to manually flip a PO to create an invoice.
- Supplier Actionable Notifications (SAN), where you act on an email without logging in to the CSP.
- cXML, where you can automate the process of sending an invoice file using Coupa's standard cXML format.
- API, where you can automate the process of sending an invoice file using Coupa's API.
- Excel spreadsheet, emailed by your customer, which you fill out and send back to them.

Can I reuse an invoice number once my customer has deleted it on their end?

Yes, if a customer deleted an invoice number, you can reuse it.

Can I submit PDF invoices created from my system instead of using online invoicing?

Yes, you can. You can upload your PDF invoices in the following ways:

- Log in to the CSP to create an invoice and attach the PDF. You don't need to contact your customer to do this, and it only takes a moment.
- Email the PDF directly to your customer. This is ideal for invoices without a PO. However, your customer might have to manually enter the PDF invoice information into Coupa, which may cause a delay in payment. Check with your customer if this option works for them. They need to set up a specific email address where you can send the PDF.

Why can't I send cXML invoices?

Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

How do I know if an invoice has been registered?

On the main menu, click on the **Invoices** tab. For the desired customer, look for invoices that are still listed as drafts. They need to be edited and then submitted. If the invoice is not there, it's not in the system.

How do I add shipping charges to an invoice?

You can add shipping charges at the bottom of the invoice or at the line item level. Ask your customer which method they prefer.

Do I need to include accounting information on cXML invoices?

Invoices against a PO don't need accounting information, because that information is part of the requisition and is carried over to the PO. When an invoice references a PO line number, Coupa takes the accounting information associated with the line and adds it to the invoice.

How do I credit or cancel an invoice that's already been billed?

To create a credit, enter a negative quantity. For more information, see [Create a credit note](#).

Once an invoice is submitted, it can't be changed in any way. For more information, see [Create or Edit an Invoice](#).

How do I make a part claim on an invoice?

You can invoice multiple times against a single PO. Just click the gold coin icon and enter the amount you'd like to appear on the invoice.

Why can't I edit, void, or delete an invoice?

Once an invoice has been submitted, it can't be changed in any way. This ensures invoice processing integrity. However, you still have options:

1. Ask your customer to reject or void the existing invoice. You can then create a new one.

Note: If your customer is using compliant invoicing, they can only reject invoices but not void them.

2. Create a new credit memo that credits the customer for the original value, and then create a new invoice.

Ask your customer which method they prefer.

What does the status "Tolerance Hold" on an invoice mean?

It means your invoiced amount differs from the PO by more than your customer allows without manual approval. If an invoice has been on hold for awhile, ask your customer to review it.

What do I do if an invoice was rejected?

Just create a new invoice to replace the one that was rejected.

Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is your customer's queue and you'll be paid based on the payment terms you set with your customer.

What if I have an invoice that hasn't been paid?

For questions regarding payment information, contact your customer directly. Some payment details might be on the invoice document in Coupa, but not all customers update this information. Also, in your notification settings you can choose to receive payment notifications via email or short text message (SMS).

Do I need to see a purchase order on the CSP before I can invoice my customer?

It depends on how your customer has you set up. Contact them and ask how you're configured, and if you can send non-PO backed invoices.

What does the Export to button do?

You can export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (.zip) file.

By default, the maximum number of rows that you can export is 200,000. If you try to export a larger table, you receive an error message stating that only 200,000 rows are exported.

Note: There is no limitation on the number of invoices or file size when exporting legal invoices.

Tip: For the best performance, it is recommended not to export more than 1,000 invoices at a time.

When you export a table with less than 500 rows, the file downloads to your computer immediately. When a table has more than 500 rows, you receive the exported file zipped in an email.

How do I create a credit memo?

Log in to the CSP and click on the **Orders** tab on the main menu. Choose the PO you'd like to create a credit for and

select the red coins. You'll create a negative invoice with either a negative quantity or a negative amount. For more information, see [Coupa Supplier Portal](#).

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Why do I get the "VAT ID format incorrect" error?

You need to add GB or ABN in front of the VAT number for British or Australian suppliers/invoices. On the main menu, click on the **Admin** tab to add a legal entity with the correct VAT ID under **Legal Entity Setup**.

What do I do if I get the "Please fix the below error" message?

Something is wrong on the customer's end. Ask your customer to check their Coupa instance to see if there is any custom mandate field which can't be viewed on your side or if the billing account is active. Your customer can open a ticket with Coupa support if they can't solve the problem.

What types of files can I attach to an invoice?

For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

How long are legal invoices available for download?

Invoices in the CSP are available for you to download as long as you are connected to the corresponding customer through the CSP. You can also develop an internal process for downloading and storing these invoices in a separate electronic archive of your choice.

Frequently Asked Questions

<u>Questions</u>	<u>Answers</u>
Is CSP free for suppliers?	Yes, Coupa doesn't charge suppliers to use the CSP
Where do I register for the CSP?	You can request an invitation to join the CSP. Ask your customer to send you an invitation email or visit https://supplier.coupa.com .
Why didn't I receive the email invitation to join Coupa?	Check your spam/junk email folder. Emails sometimes get flagged as spam. If you still cannot find the email invitation, you can register instead. However, if you register, make sure to use the same email address to register that your customer used to invite you.
Where do I sign in to the CSP?	http://supplier.coupa.com
How do I cancel my CSP account?	If you're no longer doing business with the customer, ask the customer to make you inactive in the CSP system.

Additional Resources

Feel free to explore the Coupa site for all things CSP! Here you can find additional videos, supplier guides, and more.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal