

Quick Reference Guide

GUIDE TO SUBMITTING AN INVOICE AGAINST A BLANKET PURCHASE ORDER

You can invoice using your Coupa Supplier Portal account. This is IRTs preferred method of invoicing.

This guide provides the step by step actions required to submit your invoice against a blanket (bucket) purchase order.

A blanket purchase order (PO) can be a single line that covers an extended period of time or it could have multiple lines split out to cover each month in the extended time frame. The lines are designed to allow you to invoice multiple times against the appropriate invoice line.

IRT0077736 8/3/23	ssued None	Lawn Mowing Services Jan 23 to Jun 23 No for J Smith	Example single line blanket PO	None	9 9 9
IRT0077546 2/3/23 I	ssued None	Mowing for John Smith - March 23 No Mowing for John Smith - April 23 Mowing for John Smith - May 23 Mowing for John Smith - June 23 Mowing for John Smith - July 23	Example multi-line blanket PO	None	i: i:



Step 1

Navigate to your "Orders" tab in your Coupa Supplier Portal.

se Oro	ders					
rom Custon this is set on y	n er Your Comp	any Information set	up page and will be displayed for CSP and	SAN suppliers on the Purcha	ise Order list page}	
		Click the	Action to Invoice from a Pu	rchase Order		
			Vie	aw All	✓ Search	₽
Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total Assigned to	Actions
3/3/23	Issued	None	Lawn Mowing Services Jan 23 to Jun 23 for J Smith	No	None	10 1 0
2/3/23	Issued I	Vone	Mowing for John Smith - March 23 Mowing for John Smith - April 23 Mowing for John Smith - May 23	No	None	le le
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Step 2

In the orders tab, find the correct PO by searching in the Purchase Orders table.

You can use the "View" drop down to reduce the number of purchase orders, or use the search bar to assist finding the correct PO.

Purcha	ase Oro	ders						
Instructions {Example text	From Custor - this is set on	ner your Corr	npany Information set	up page and will be displayed for CSP and	SAN suppliers on the Purcha	ise Order	list page}	
			Click the	Action to Invoice from a Pu	rchase Order			
Export to	~			Vie	All	Ƴ S	earch	\mathcal{P}
PO Number	Order Date	Status	Acknowledged At	ltems	Unanswered Comments	Total	Assigned To	Actions
IRT0077736	8/3/23	Issued	None	Lawn Mowing Services Jan 23 to Jun 23 for L Smith	No	None		1 ₀ 1 ₀
IRT0077546	2/3/23	Issued	None	Mowing for John Smith - March 23 Mowing for John Smith - April 23 Mowing for John Smith - May 23 Mowing for John Smith - June 23 Mowing for John Smith - July 23	No	None		19 19

Step 3

If you are invoicing a multiple line blanket PO, check which line you want to invoice.

For example – in this screenshot, we will invoice the month of April which is the second line listed.



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Purcha	ase Or	ders						Step 4
nstructions I	From Custo	mer						Click on the gold coin ice
Example text -	this is set on	your Con	npany Information set	up page and will be displayed for CSP and	SAN suppliers on the Purcha	se Order list page}		Click off the gold conflico
			Click the	Action to Invoice from a Pu	rchase Order			right of the PO that will b
Export to	·			Vie	w All	✓ Search	~	invoiced.
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total Assigned To	Actions	
IRT0077736	8/3/23	Issued	None	Lawn Mowing Services Jan 23 to Jun 23 for J Smith	No	None	is is	
IRT0077546	2/3/23	Issued	None	Mowing for John Smith - March 23 Mowing for John Smith - April 23 Mowing for John Smith - May 23 Mowing for John Smith - June 23 Mowing for John Smith - July 23	No	None	⁸⁸ 9	

	S
🔅 General Info	a
* Invoice # 9100a	E ir
* Invoice Date 8/3/23	1
Payment Term 14D	2
Date of Supply 8/3/23	3
* Currency AUD 🗸	
Delivery Number	
Status Draft	
Image Scan Choose file No file chosen	
Supplier Note	
Attachments 🥡 Add File URL Text	
	J

itep 5

he invoice has now been created ind reflects the PO information.

Inter the following information nto the General Info section

- . Enter your invoice number.
- 2. Enter the invoice date
- B. Enter the supply date
- Upload your invoice document ŀ. by selecting the "Choose file" beside the "Image Scan".



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B Mowing for John Smith - 0.00 0.00 0 Line R10077546-1 Clear Service/Time Sheets Line None Contract Credit Line None upplier part number WO Number None Cliant ID & Name None None 1113 0113-307015-1050-01-0 None Starte GST Rate GST Amount Tax Reference Image: Service for the service	Type	Description	Price			0.00
O Line R10077546-1 Service/Time Sheets Line None Contract Image Credit Line None upplier part number WO Number None Client ID & Name None 11113 0113-307015-1050-01-0 xxes GST Rate GST Amount 0.00		Mowing for Jo	hn Smith -	0.00		0.000
upplier part number WO Number Client ID & Name None None None None	PO Line IRT0077546-	1 🔎 Clear	Service/Time Sheets Line None	Contract	Credit Line None	
illing 113-307015-1050-01-0 axes GST Rate GST Amount Tax Reference 0.00 Price 200.00 200.00	Supplier part	number	WO Number None	Client ID & Name None		
axes GST Rate GST Amount Tax Reference O.00 Price 200.00 200.00 200.00	Billing 10113-307015	-1050-01-0				
GST Rate GST Amount Tax Reference	Taxes					
Price 200.00	GST Rate		GST Amount Tax Refere	nce		
rpe Description Price 200.00 à Moving for John Smith - 200.00		~	0.00			
rpe Description Price 200.00						
Opescription Price B Mowing for John Smith - 200.00						
Mowing for John Smith - 200.00	Туре	Description	Price			200.00
	a	Mowing for Joh	in Smith -	200.00		200.00
O Line Service/Time Sheets Line Contract Credit Line			Service/Time Sheets Line	Contract	Credit Line	
RT0077546-2 O Clear None None O	PO Line				None O	

Step 6

Scroll down to the lines section of the invoice

In step 3 we identified which line we wanted to invoice, in this example it was the second line.

Scroll to the second line and enter your price, if quantity is required, enter quantity.

If you need to double check you have the correct line, click into the Description and use your right arrow to scroll across to see the full description.

Note – if you invoice the wrong line, your invoice may be rejected.

Туре	Description	Price			0.00
œ	Mowing for Joh	n Smith -	0.00		0.0
PO Line		Service/Time Sheets Line	Contract	Credit Line	
IRT0077546-1	O Clear	None	~	None 🔎	

Step 7

As the remaining invoice lines are not required, these need to be deleted to enable you to submit your invoice.

Locate the 😢 at the end of each invoice line that has not been updated with a price and/or quantity.

Select the 😢 to delete the lines that are not required.

You should only have the one line remaining that has the price and/or quantity.



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Type 🔁	Description Mowing for John S	Price	200.00		200.00 8	On the remaining line undate the
PO Line IRT0077546-2 Supplier part m Billing 10113-307015-1 Taxes	Clear umber	Service/Time Sheets Line None WO Number None	Contract Client ID & Name None	Credit Line None 🔎		GST rate to reflect the required GST charge.
GST Rate)	GST Amount Tax Referen	ce			

Add Line OPick lin	es from PO 🕂 Pick lines from Contract	Total Taxes	
		Lines Net Total Lines GST Totals	200.00 20.00
		Shipping GST	0.00
		Tax Reference Enter	a tax reason description.
		Total GST	20.00
		Gross Total	200.00 220.00

Step 9

Scroll to the bottom of the invoice and select the calculate button to ensure the gross total is correct.

	lotal laxes		
	Lines Net Total Lines GST Totals	200.00 20.00	Select the submit button.
	Shipping		
	GST Cax Reference	0.000	
	Total GST	20.00	
	Net Total	200.00	
	Gross Total	220.00	
c.	Delete Cancel Save as draft	Calculate Submit	



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lowing for John Smit	ih -	200.00			
				200.00	
) Clear	Service/Time Sheets Line None	Contract	Credit Line None 🔎		
^{aber} Are you	ready to send?		×		
Coupa is a invoice to t 0-01-0	bout to create an invoice on your b his transaction as the Coupa gene	vehalf. Please make sure you are no rated PDF is your and your custome	it attaching another irs legal invoice.		
		Continue Editing	Send Invoice		
	D Clear Are you Coupa is al invoice to ti i0-01-0	O Clear None Are you ready to send? Coupa is about to create an invoice on your invoice to this transaction as the Coupa gene 0.014	Clear None Are you ready to send? Coupa is about to create an invoice on your behalf. Please make sure you are no invoice to this transaction as the Coupa generated PDF is your and your custome 0-014	O Clear None None None O https://documentstate Are you ready to send? X 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. 0.014	Clear None None None O

Step 11

A pop up will confirm that you want to send the invoice. Hit the Send Invoice button.

		Orders	Service/Ti	me Sheets	ASN		Catalogues	Payments	Busines	s Performance	Sourcing
					_						
ders	Order lines	Returns	Order Chan	ges Order	Line Change:	s Order I	Header Confirmat	ions Deliverie	is		
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	Veri	fv V	aur A		unt						
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	Coupa veri thousands	of custom	s your accol iers.	unt more v	isible to an	d trusted	ру				
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		Get	verified							١Ô/	
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								Selec	t Customer	IRT - TEST	
	Invo	ices						Selec	t Customer	IRT - TEST	
	Invo	ices						Selec	t Customer	IRT - TEST	
		ices	ustomer	nonu Informa	tion actus na	ve opd will b	o displayed for C	Selec	t Customer	IRT - TEST	
	Invo Instructio (Example Creat	ices ons From C text - this is s e Invoid	ustomer let on your Con CS 🚺	npany Informa	tion setup pag	ge and will b	e displayed for C:	Selec SP and SAN supp	t Customer	IRT - TEST	
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	Invo Instructio (Example Create Create	ices ons From C text - this is a e Invoice Invoice from to ~	ustomer et on your Con es PO Create Create d Date	npany Informa ite Invoice fro	m Contract	ge and will b Creat Total	e displayed for C: e Blank Invoice Unanswered C	Select SP and SAN supp Create Crr View All comments Disp	et Customer oliers on the Im adit Note	IRT - TEST	h Ad
	Invo Instructio (Example Create Export Inv 9	ices ons From C text - this is a e Invoice Invoice from to ~ roice # 1100a	ustomer et on your Con eS O reated Date 8/3/23	npany Informa te Invoice fro Status Processing	P # IF T007754	Total	e displayed for C: e Blank Invoice Unanswered C No	Select SP and SAN supp Create Cr View All comments Disp	t Customer oliers on the Im addt Note	IRT - TEST	h Ac

The invoice is now submitted to IRT to approve. You can monitor the status in your Invoices table located in the Invoices tab.

You can submit as many invoices that you need against the relevant month. For example if you provide two services per month, you can submit two invoices against the monthly line.