How to create invoices through the Coupa Supplier Portal (CSP) Suppliers Guide For Avient Suppliers

View and Manage Invoices

In order to view your **Invoices** page, click on the **Invoices** tab on the main menu.

Select Avient from the **Select Customer** drop-down list in the top right corner.

The **Invoices** table will show the following information for all the invoices you sent to Avient.

Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice
Created Date	Date when the invoice was created
Status	Current status of the invoice. For more information, see the invoice status list below
PO #	PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO
Total	Total amount of the invoice
Unanswered Comments	Your comments on the invoice along with Avient's comment's you (the supplier) need to respond to. You can see all comments or add comments when you open the invoice.
Dispute Reason	Avient's reason for disputing the invoice

Column	Description
Actions	Click on the **Edit** (✏️) or Delete (❌) icon to edit or delete an invoice. You can edit or delete only draft invoices.

Invoices can have the following statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Avient can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices
Approved	The invoice has been accepted for payment by Avient
Disputed	The invoice has been disputed
Draft	The invoice has been created, but it has not been submitted yet
Pending Approval	The invoice is currently under review by Avient.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact Avient to get the invoice back on track.

You can filter the table by using the search bar, or click on the **View** drop-down list to perform advanced filtering.

You can export the invoices table in CSV or Excel format.

View Invoice Lines

Click on the **Invoice Lines** tab to see information on the invoice lines for each invoice.

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

Invoices   Invoice Lines   Payment Receipts

Select Customer   Acme Inc.

Invoice Lines

Export to ⌄   View All ⌄   Search 🔍

Invoice #	Line #	Description	Status	Invoice Date	PO Line #	Total
1234	2	description invoice line 2	Pending Approval	10/15/20	2	300.00
1234	1	description invoice line 1	Pending Approval	10/15/20	1	100.00

Select Avient from the **Select Customer** drop-down list in the top right corner.

The **Invoice Lines** table will then show the following information for all the invoice lines:

Column	Description
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Line #	Invoice line number.
Description	Invoice line description.
Status	Current status of the invoice.
Invoice Date	Date when the invoice was created.
PO Line #	PO line number.
Total	Total amount of the invoice line.

You can export the invoice lines table in CSV or Excel format.

You can filter the table by using the search bar or click on the **View** drop-down list to perform advanced filtering.

Create an Invoice

Select Avient from the **Select Customer** drop-down list in the top right corner.

Click on the relevant button above the Invoices table to:

➢ Create Invoice from PO

➢ Create Credit Note

Create an invoice from a PO

1. Go to the **Orders** page or, on the **Invoices** page, click the **Create Invoice from PO** button above the table to go to the **Orders** page

2. On the **Orders** page, you can do one of the following:

   o Click the **Create Invoice** (🟡) icon in the **Actions** column of the **Purchase Orders** table

   o Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button

Purchase Order #3050

Status	Issued - Sent via Email
Order Date	05/31/17
Revision Date	05/31/17
Requester	FirstName LastName
Email	FirstNameLastName@coupa.com
Payment Term	Net 30 🡒 **Accelerate Payment**
Attachments	None
Acknowledged	☐

📍 Shipping

Ship-To Address	1855 South Grant Street
	San Mateo, CA 94402
	United States
	Attn: FirstName LastName
Terms	None

≡ Lines

	Advanced	Search 🔍	Sort by	Line Number: 0 → 9 ▾

1	Type	Item	Qty	Unit	Price	Total		Invoiced
	🛒	Purple Spiral Notebook	200	Each	0.50	100.00		0.00

Part Number
None

Per page 15 | 45 | **90**

	Total	**100.00** USD

[Create Invoice] [Create Service/Time Sheets] [Request Change] [Save] [🖨 Print View]

💬 Comments

[   ]

[Add Comment]

3. You can add a new or choose existing invoicing details, such as adding or selecting an invoice from address, remit-to, or ship from address

Choose Invoicing Details ✕

* Legal Entity	Legal Entity 1 ▾	➕ Add New
Invoice From	Success Street	
	Customer City, 12345	
	United States	
	United States	
* Remit-To	Select ▾	➕ Add New
* Ship From Address	Select ▾	➕ Add New

[Cancel]

If you do not have a legal entity, you need to add one by clicking on the **Add New** link or on the add/plus ( ) icon. You will be guided through creating your legal entity. For more information, see Set up Legal Entities.

The selected or newly created legal entity is added to your invoice.

4. On the Create **Invoice** page, fill in the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields will be pre-populated with information from the PO.

You can also attach files to an invoice using **Attachment** field. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

Note: For specific countries there might be additional requirement fields to populate depending on the laws and regulations of the country. Please verify compliance prior submitting invoice.

Create Invoice Create

General Info

* Invoice #	
* Invoice Date	01/11/19 📅
Payment Term	Net 30 🏎 Accelerate Payment
* Currency	USD ▾
Delivery Number	
Status	Draft
Shipping Term	Standard ▾
Image Scan	Browse... No file selected.
Supplier Note	
* Attachments ⓘ	Add File	URL	Text
Discount Amount	
Payment Order Reference	

From

* Supplier	SUPPLIERNAME
Supplier Tax ID	None
* Invoice From Address	ABCD 🔍
	123 Success Ave
	Results City, XY 99999
	United States
* Remit-To Address	ABCD 🔍
	123 Success Ave
	Results City, XY 99999
	United States
* Ship From Address	ABCD 🔍
	123 Success Ave
	Results City, XY 99999
	United States

To

Customer	Coupa
* Bill To Address	No address selected
Buyer Tax ID	▾
Ship To Address	No address selected

▦ Lines

☐ Line Level Taxation

➕ Add Line

Subtotal			0.00
Shipping			
Tax Description (Shipping)	▾		0.000
Handling			
Tax Description (Handling)	▾		0.000
Misc			
Tax Description (Misc)	▾		0.000
Tax Description	▾	0	0.00 ➕
Total Tax			0.00
Total			**0.00**

❌ Delete   Cancel   Save as draft   Calculate   Submit

💬 0 Comments

Add Comment

In the Subtotal section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.

Subtotal			363.00
Shipping			10
Tax Description (Shipping)	US: CA - 8.25 ⌄	8.25	0.83
Handling			8
Tax Description (Handling)	US: CA - 8.25 ⌄	8.25	0.66
Misc			1
Tax Description (Misc)	US: CA - 8.25 ⌄	8.25	0.08
Total Tax			1.57
Total			**383.57**

Clicking **Calculate** will give you the gross total amount including the tax values.

You can submit the invoice or save it as a draft to submit later.

Before submitting the invoice, you can cancel or delete it.

Note: You can delete only draft invoices. If you want to make changes to the invoice after submitting it, you must contact your Avient representative.

Create a credit note

You can issue a credit note to:

➢ Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice

➢ Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

To create a credit note:

1. Click on the **Create Credit Note** button above the **Invoices** table on the **Invoices** page or, on the **Orders** page, click on the **Create Credit Note** (🪙) icon in the **Actions** column of the **Purchase Orders** table.

2. In the **Credit Note** popup, select the reason for your credit note.

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ⦿ Resolve issue for invoice number   Select an Option ⌄
○ Other (e.g. rebate)

Cancel   Continue