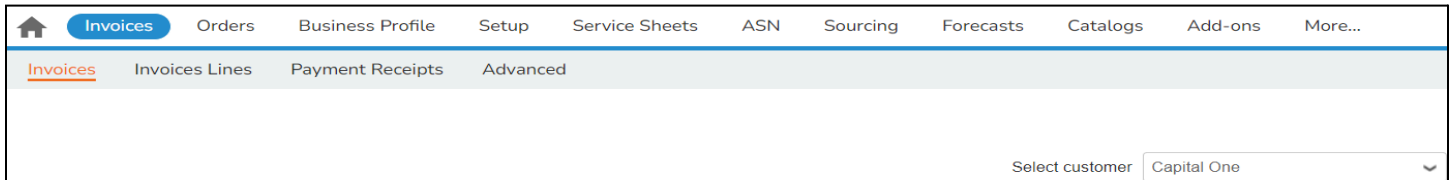


# Invoicing on the Coupa Supplier Portal (CSP)

To submit invoices on the [CSP](#) you must be a registered user. If you have not yet received an invitation to register, please contact the [ESM Operations Team](#).

## Getting Started

1. From the blue navigation bar located at the top of the Coupa home page, click on the Orders tab.
2. Select Capital One in the **Select Customer** drop down.



## Creating your Invoice

### Purchase Orders

**Instructions From Customer**

Please ensure that you acknowledge the PO.

Click the Action to Invoice from a Purchase Order

View All

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
<a href="#">US303664</a>	09/05/19	Issued	None	R25 Test, Supplier Flip, Expired Contract	No	500.00 USD	
<a href="#">US303654</a>	08/26/19	Issued	None	AP 11_ML	No	400.00 USD	
<a href="#">US303653</a>	08/26/19	Issued	None	TEST 12	No	500.00 USD	

Under Actions on the right side click on the gold coin icon to create an invoice. (Clicking the red coin icon allows you to create a credit memo.)

The Create Invoice screen displays.

## Create Invoice Create

### General Info

\* Invoice #

Invoice Date Set automatically at time of submission

Payment Term  [Accelerate Payment](#)

\* Currency

Status

Image Scan [Choose File](#) No file chosen

Supplier Note

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

### From

\* Supplier

Supplier Tax ID

\* Invoice From Address   
1234 Upgrade Street  
San Mateo, CA 11111  
United States

\* Remit-To Address   
1234 Upgrade Street  
San Mateo, CA 11111  
United States

\* Ship From Address   
1234 Upgrade Street  
San Mateo, CA 11111  
United States

### To

Customer

### Lines

☐ Line Level Taxation

Type	Description	Price	
	<input type="text" value="Shipping Test 2"/>	<input type="text" value="1,000.00"/>	1,000.00

PO Line [US303616-1](#) [Clear](#)

Contract

Supplier Part Number

Billing Notes

Billing  
12000-10457-Coffee Services-83020032

[Add Tag](#)

[+ Add Line](#) [+ Pick Lines from PO](#)

### Totals & Taxes

Lines Net Total	1,000.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	1,000.00
<b>Total</b>	<b>1,000.00</b>

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)

### Comments

Enter comment

- Enter the invoice number.
- Invoice date will auto populate at the time of submission.
- To get your invoices paid faster, click on the Accelerate payment button next to the Payment Term field. (Instructions for Coupa Accelerate are included in the Appendix to this document.)
- Upload a PDF copy of your invoice in the attachments field. Do not use the image scan field, the invoice will not submit.

- Enter quantities, item prices, service amounts, shipping, handling, misc. fees, and taxes.
- Click Calculate to update the total.
- Click Submit

You will receive a final prompt confirming the invoice amount. If the amount is correct, click “Send Invoice.”

Are You Ready to Send?

×

You're about to send an invoice to **Capital One** for a total amount of **1,000.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing

Send Invoice

## Appendix:

# Coupa Accelerate - Static Discounting

There are two options to choose from when accelerating payment:

- Apply discounts to future purchase orders. You must have admin access to use this option.
- Apply discounts to individual invoices.

## Apply Discounts to Future Purchase Orders

1. Log in to the [Coupa Supplier Portal](#) (CSP). If you don't have an account yet, please email the [ESM Operations Team](#) for an invite.
2. From the CSP home page, select the **Setup** tab. The Admin Users screen displays.
3. Click **tatic Discounting** on the left-hand side of the screen.
4. Click the blue **Edit Preferences** button at the top-right of the screen. The Coupa Accelerate Preferences window displays.
5. Use the appropriate drop-down to select your desired discount. You should select a discount for each current payment term for which you want to accelerate payment.

The discount you choose for the payment term will be applied to all new purchase orders with that payment term for all of your customers - not just Capital One.

## Static Discounting

Set your static discounting preferences here before you submit any invoices and Coupa will automatically update payment terms on future invoices based on these settings. You can define global settings which will apply to all your buyers using Static discounting, or set unique settings for a particular buyer which will override the global settings. Use this setting if you want to offer discounts on all Future Invoices you submit to your buyer. Email [accelerate@coupa.com](mailto:accelerate@coupa.com) if you need any assistance.

Your original payment term	Your preferred term
Net 30	None
Net 45	None
Net 60	None
Net 75	None
Net 90	1%/40 NET 60
Net 120	1.5%/30 NET 60
	2%/20 NET 60
	2.5%/10 NET 60

Person or Group at your business who is authorizing these preference changes: \* Name

Approved your preferred Static Discounting payment term

6. Enter the name and email address of the individual at your business who is authorizing these preference changes.
7. You can elect to have these preference changes apply to all of your invoices including invoices not submitted through the CSP, by clicking the **Apply to ALL invoices** checkbox.

Person or Group at your company (typically finance or treasury) who has approved your preferred accelerated payment term

\* Name John Doe

\* Email Jon.Doe@BusinessA.com

☐ Apply to ALL invoices. (Including non-PO invoices and Coupa invoices not submitted through this Supplier Portal). [Learn more](#)

Cancel

Save

8. Click **Save**.

## Apply Discounts to Individual Invoices

Using this option, you will apply discounts to individual invoices when you create them.

If you applied discounts for future purchase orders, you will not be able to apply discounts to individual invoices.

1. When creating the invoice, select **Accelerate Payment**.

## Create Invoice Create

### General Info

\* Invoice # INV2789 ✓

Invoice Date Set automatically at time of submission

Payment Term 60  Accelerate Payment 

\* Currency USD ▼

2. Click the desired discount for this invoice. This will not affect future invoices.

### Static Discount Payments

Get paid faster with Static Discounting. [Learn More](#)  
Please select the new term and click the Update button to change the terms.

Current Payment Term

60

→

New Payment Term

2.5% Discount in 10 days, Net 60 ▼

2.5% Discount in 10 days, Net 60

1% Disc in 40 Days, Net 60

1.5% Disc in 30 Days, Net 60

2% Disc in 20 Days, Net 60

☐ I am authorized to choose payment terms.

Update

3. Check the 'I am authorized to choose payment terms' box then, click **Update**.

## Static Discount Payments



Get paid faster with Static Discounting. [Learn More](#)

Please select the new term and click the Update button to change the terms.

### Current Payment Term

60



### New Payment Term

2.5% Discount in 10 days, Net 60 ▾

☒ I am authorized to choose payment terms.

Cancel

Update

### For UK Suppliers Only

If you are including value-added tax (VAT) on your invoice, you must show the terms of the discount on the invoice. For example: "A discount of 1% of the full price applies if the payment is made within 10 days of the invoice date. No credit note will be issued. Following the payment made, you must ensure you have only recovered the VAT actually paid."