



Submitting an invoice

Quick Reference Guide

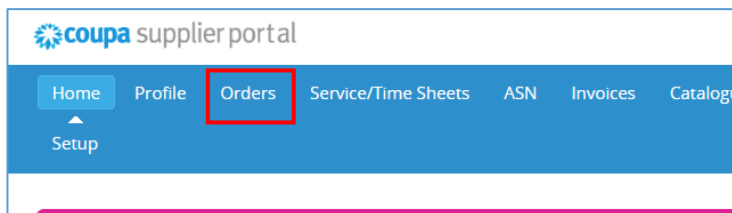
GUIDE TO SUBMITTING AN INVOICE AGAINST A BLANKET PURCHASE ORDER

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

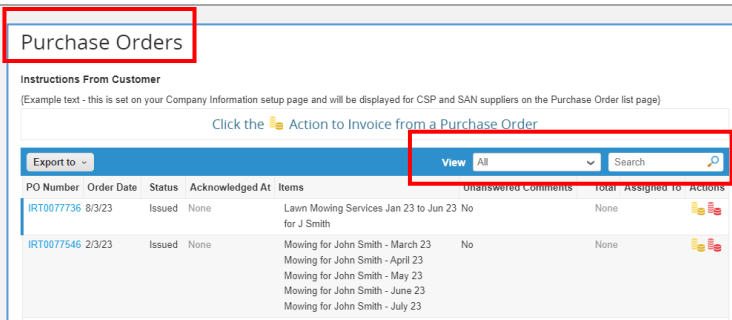
This guide provides the step by step actions required to submit your invoice against a blanket (bucket) purchase order.

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	Issued	None	Lawn Mowing Services Jan 23 to Jun 23 for J Smith	No	None	
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	

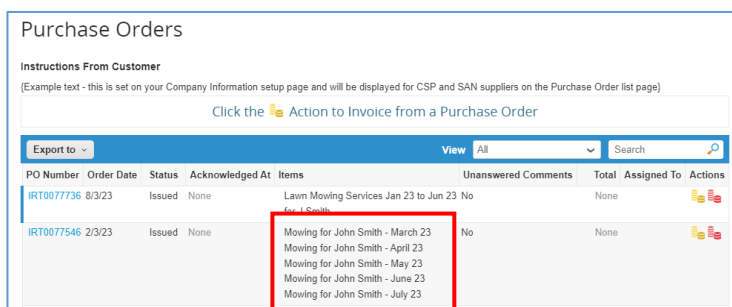


Step 1
Navigate to your “Orders” tab in your Coupa Supplier Portal.



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.



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.



Submitting an invoice



Quick Reference Guide

Purchase Orders

Instructions From Customer

(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Invoice from a Purchase Order

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 No for J Smith		None		
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		

Step 4

Click on the gold coin icon to the right of the PO that will be invoiced.

Create Invoice Create

General Info

* Invoice # 

* Invoice Date 

Payment Term 14D

Date of Supply 

* Currency AUD 

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

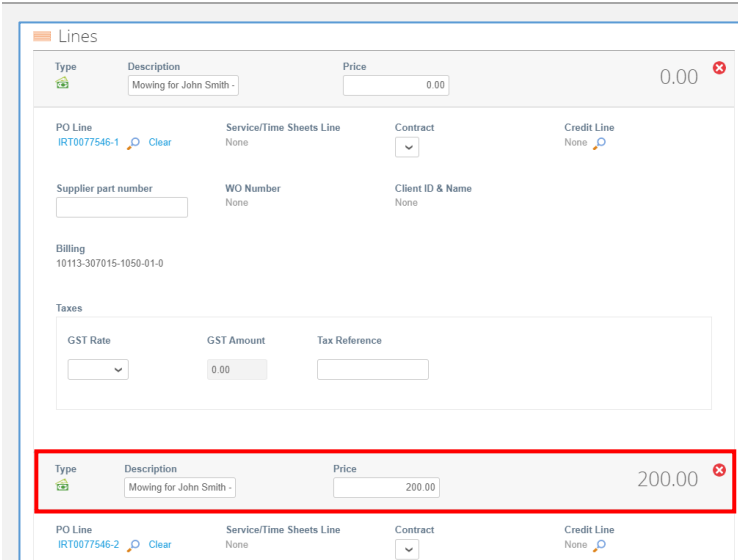
Attachments  Add [File](#) | [URL](#) | [Text](#)

Step 5


The invoice has now been created and reflects the PO information.

Enter the following information into the General Info section

1. Enter your invoice number.
2. Enter the invoice date
3. Enter the supply date
4. Upload your invoice document by selecting the "Choose file" beside the "Image Scan".




The screenshot shows the 'Lines' section of an invoice. The top line is highlighted with a red box, indicating it is the selected line. The line details are as follows:

Type	Description	Price
	Mowing for John Smith -	0.00

Below the table, there are fields for PO Line (IRT0077546-1), Service/Time Sheets Line (None), Contract (dropdown), and Credit Line (None). There are also fields for Supplier part number, WO Number, and Client ID & Name. The Billing information is 10113-307015-1050-01-0. The Taxes section shows a GST Rate dropdown, a GST Amount of 0.00, and a Tax Reference field.

The bottom line is highlighted with a blue box, showing a price of 0.00. Its details are:

Type	Description	Price
	Mowing for John Smith -	200.00

Below this line, there are fields for PO Line (IRT0077546-2), Service/Time Sheets Line (None), Contract (dropdown), and Credit Line (None). There are also fields for Supplier part number, WO Number, and Client ID & Name.

Step 6

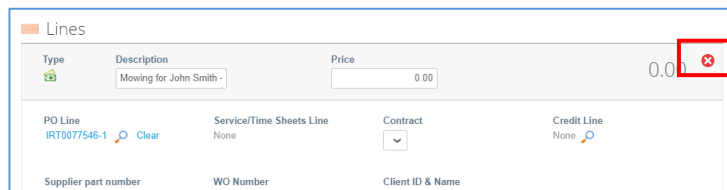
Scroll down to the lines section of the invoice

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.




The screenshot shows the 'Lines' section of an invoice. The top line is highlighted with a red box, indicating it is the selected line. The line details are as follows:

Type	Description	Price
	Mowing for John Smith -	0.00

Below the table, there are fields for PO Line (IRT0077546-1), Service/Time Sheets Line (None), Contract (dropdown), and Credit Line (None). There are also fields for Supplier part number, WO Number, and Client ID & Name.


The bottom line is highlighted with a blue box, showing a price of 0.00. Its details are:


Type	Description	Price
	Mowing for John Smith -	0.00

Below this line, there are fields for PO Line (IRT0077546-2), Service/Time Sheets Line (None), Contract (dropdown), and Credit Line (None). There are also fields for Supplier part number, WO Number, and Client ID & Name.

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.



Submitting an invoice

Quick Reference Guide

The screenshot shows a form for adding an invoice line. The 'Type' is 'Mowing for John Smith -' and the 'Price' is '200.00'. Below this, there are fields for 'PO Line' (IRT0077546-2), 'Service/Time Sheets Line' (None), 'Contract' (dropdown), and 'Credit Line' (None). There are also fields for 'Supplier part number', 'WO Number', and 'Client ID & Name'. A 'Billing' section contains the number '10113-307015-1050-01-0'. At the bottom, a 'Taxes' section has a table with columns 'GST Rate', 'GST Amount', and 'Tax Reference'. The 'GST Rate' dropdown is set to '10.0%' and is highlighted with a red box.

Step 8

On the remaining line update the GST rate to reflect the required GST charge.

The screenshot shows the 'Total Taxes' summary section of the invoice. It includes a table with 'Lines Net Total' (200.00) and 'Lines GST Totals' (20.00). Below this is a 'Shipping' section with a dropdown for 'GST' and a 'Tax Reference' field. At the bottom, there is a summary table with 'Total GST' (20.00), 'Net Total' (200.00), and 'Gross Total' (220.00). Below the summary table are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. The 'Calculate' button is highlighted with a red box.

Step 9

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

This screenshot is identical to the previous one, showing the 'Total Taxes' summary section. The 'Calculate' button is highlighted with a red box, and the 'Submit' button is also highlighted with a red box.

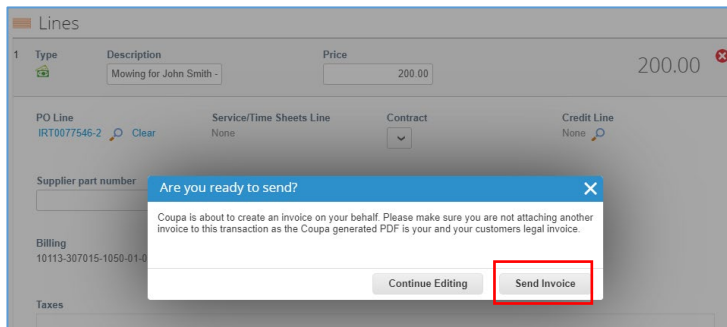
Step 10

Select the submit button.



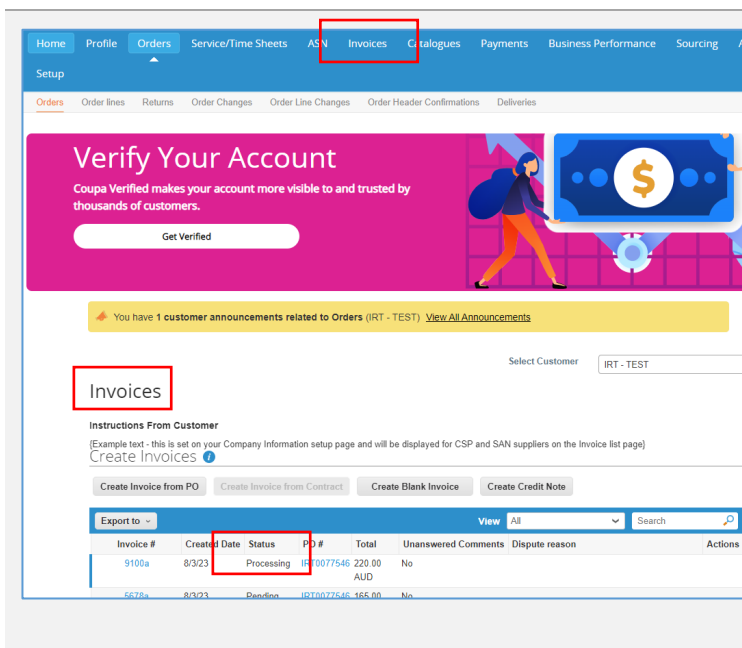
Submitting an invoice

Quick Reference Guide



Step 11

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



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.