

How to Manage POs and Create Invoices

Transactions in Coupa via Email and the Coupa Supplier Portal

With the help of Coupa, suppliers will be able to quickly receive, acknowledge, and invoice POs via email and the Coupa Supplier Portal (CSP). This document outlines the different options to perform PO and invoice related activities through Coupa.

- Coupa Supplier Portal (CSP)

The CSP will serve as your hub for managing purchase orders, invoices, and your company's information with Kirkland & Ellis.

- Notification Email

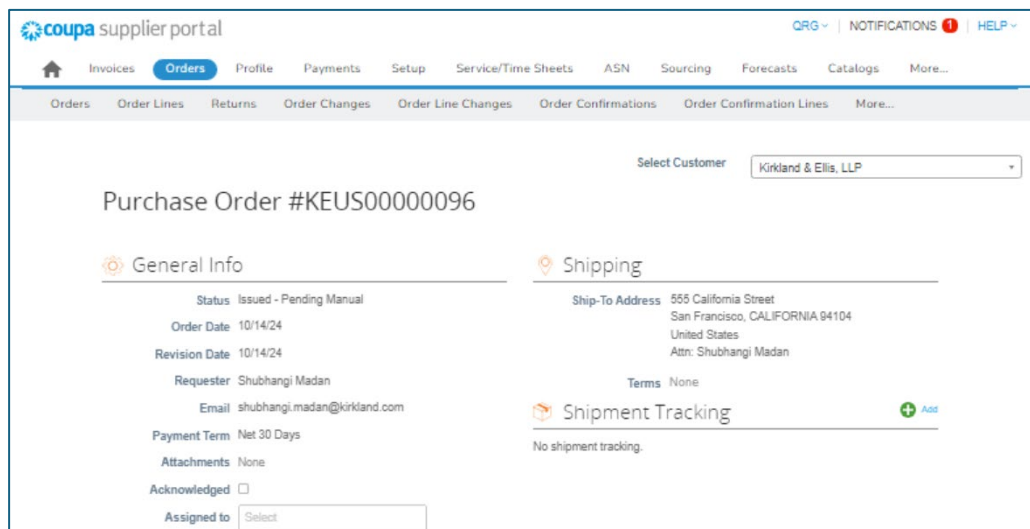
As the supplier, you will have the ability to act directly from your email inbox when you receive a purchase order (PO) notification email. The notification email will include action buttons that you will be able to act on, including:

- Acknowledge the PO
- Add a comment to the PO
- Create an invoice from the PO (PO Flip)

Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these supplier actionable notifications via email.

Email and the Coupa Supplier Portal are Linked

You will be notified of your Purchase Order from Kirkland via both email and the Coupa Supplier Portal. Suppliers can click on **Manage Order/View Order** in the email notification to review the PO in the Coupa Supplier Portal.



Purchase Order Transactions & Activity – Email

1. Purchase orders will be emailed to the address that is configured in Kirkland's Coupa supplier environment.
2. These emailed POs will also show as Coupa Notifications in your email inbox.

PO ID	KEUS00000096	Department	None
Status	Issued - Pending Manual	Last Opened	None
Order Date	10/14/24	Acknowledged At	None
Revision Date	10/14/24	Payment Term	Net 30 Days
Req #	327	Shipping	None
Supplier		Shipping	
QRG supplier 1 kirklandcoupa2024+qrg@gmail.com		555 California Street San Francisco, CALIFORNIA 94104 United States Attn: Shubhangi Madan	
Lines			
1 EA QRG Item 1 for 20.00 USD Supplier QRG supplier 1 • Commodity Outsourced & Other Office Services • Account Firm---1928376-01-77000-201-3621-39 • Period FY25 Working Budget			
			Total 20.00 USD

Acknowledge a Purchase Order – Email

The Coupa Supplier Portal will open in a new tab providing a message that confirms the Purchase Order has been acknowledged.

Purchase Order #KEUS00000096

Order marked as sent manually and acknowledged

General Info

Status: Issued - Pending Manual

Order Date: 10/14/24

Revision Date: 10/14/24

Requester: Shubhangi Madan

Email: shubhangi.madan@kirkland.com

Payment Term: Net 30 Days

Attachments: None

Acknowledged

Assigned to:

Shipping

Ship-To Address: 555 California Street
San Francisco, CALIFORNIA 94104
United States
Attn: Shubhangi Madan

Terms: None

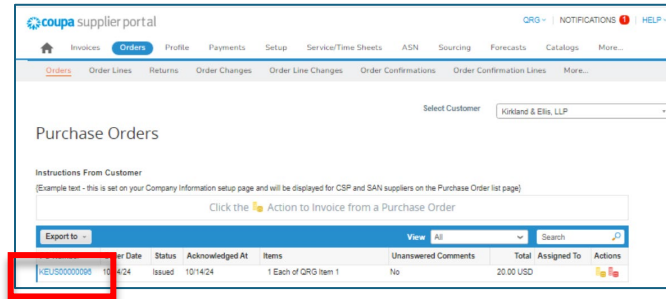
Shipment Tracking

No shipment tracking.

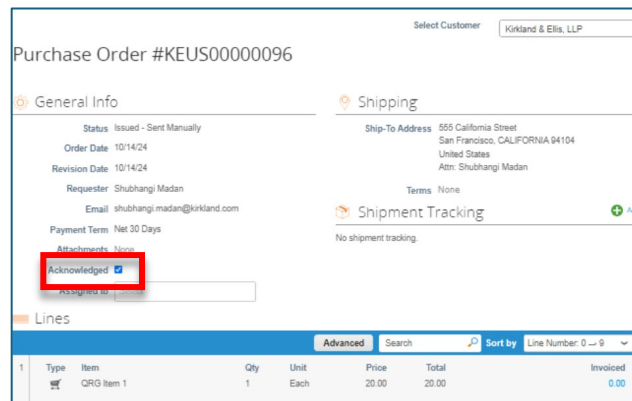
Purchase Order – CSP

Regardless of whether you use SAN (Supplier-Actionable Notifications) via email, the Purchase Orders will be captured and available in the CSP.

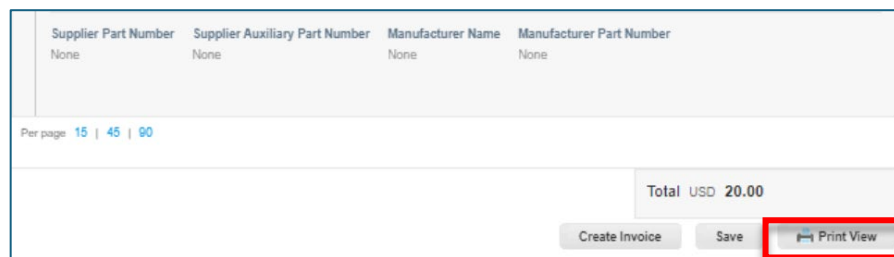
1. Click on the **Purchase Order Hyperlink** to view the PO details.



2. Select the **Acknowledge** checkbox to acknowledge the Purchase Order & notify Kirkland that the Purchase Order has been Received.



3. Click **Print View** to print the PO.

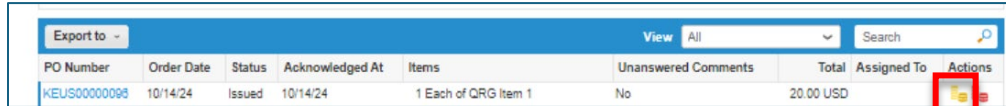



Invoice Creation - CSP

Suppliers have the option to flip a Purchase Order to an Invoice directly in the Coupa Supplier Portal.

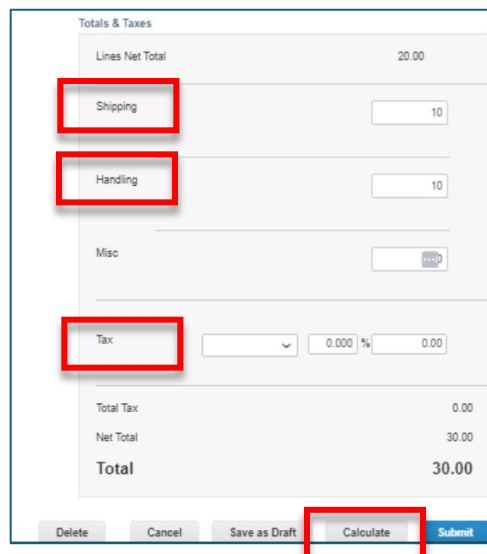
Navigate to the **Orders** tab from the CSP Homepage, then search for the PO number you would like to flip to an invoice in the search bar.

1. Click the **Gold coin** to create an invoice, under the **Actions** column of the PO.



Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
KEUS00000096	10/14/24	Issued	10/14/24	1 Each of QRG Item 1	No	20.00 USD		

2. In the invoice creation window, complete all necessary information (all required fields are indicated with an asterisk). Use your own invoice numbering convention for the Invoice # field. Attach your organization's invoice file (if applicable). Verify auto populated invoice information at the header and line level and adjust as necessary. Details from the PO are automatically populated to the invoice draft.
 3. For a Goods Purchase Order (**QTY Based**), enter **Quantity** and **Price** (these will be auto populated based on the PO).
 4. For a Services Purchase Order (**AMT Based**), enter a **Price** (this will be auto populated based on the PO).
 5. If applicable, add any **shipping, handling, and tax** information.
- You can add applicable tax in the proper section by one of the following methods:
 - Manually enter a tax percentage
 - Manually enter a tax amount (\$)
 - Click **Calculate** to update the invoice total after all additional charges are added.



Totals & Taxes

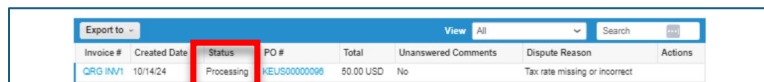
Lines Net Total	20.00
Shipping	10
Handling	10
Misc	
Tax	0.00%
Total Tax	0.00
Net Total	30.00
Total	30.00

Delete Cancel Save as Draft **Calculate** Submit

6. Click **Submit**, once all the information on the invoice is completed.
7. Click **Send Invoice** to send the completed invoice to Kirkland.

NOTE: Please keep in mind that invoices cannot be changed via email or CSP once it has been submitted.

To view the status of any invoice, click on the Invoice tab, search for the invoice and refer to the Status column.



Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
ORG INV1	10/14/24	Processing	KEUS000000098	50.00 USD	No	Tax rate missing or incorrect	

The following is a list of invoice statuses a supplier can view in the Coupa Supplier Portal:

- *Draft*: Draft/incomplete invoice that has not yet been submitted
- *Processing*: Invoice that is between supplier submission and the submitted invoice being recorded in Kirkland's Coupa environment
- *Pending Approval*: Invoice that is in the process of review prior to final approval
- *Disputed*: Invoice that is currently being disputed by K&E
- *Approved*: Invoice that is approved and processed for payment as per the payment terms
- *Voided*: Invoice that is cancelled and will not be processed for payment