

**04 – Creating Invoices
and Credit Notes in
Coupa Supplier Portal**



**Bank of
Ireland
Group**



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04.a. How to Flip a Purchase Order into an Invoice (1/7)



Log into your CSP account (<https://supplier.coupahost.com/sessions/new>) and go to the **Orders** tab to see the list of Purchase Orders received from BOI:

1

Orders

The screenshot shows the Coupah Supplier Portal interface. The 'Orders' tab is selected in the top navigation bar. Below the navigation bar, there is a 'Select customer' dropdown menu set to 'Bank of Ireland'. The main heading is 'Purchase Orders'. Underneath, there is a section for 'Instructions From Customer' with a text box containing the instruction: 'Click the [Action icon] to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table of Purchase Orders with columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains six rows of data.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
8000000283	12/15/25	Issued	None	Contract service line 1	No	1,000.00 EUR		[Action icons]
8000000248	12/05/25	Issued	None	Contract service line 1	No	1,000.00 EUR		[Action icons]
8000000237	11/27/25	Issued	None	test TCR reverse charge test TCR exempt test TCR commodity, exempt	No	15,000.00 EUR		[Action icons]
8000000230	11/14/25	Issued	None	test TCR	No	5,000.00 EUR		[Action icons]
8000000220	11/04/25	Issued	None	1 Each of Gordy High Mesh Back Operator Chair (Adjustable... 100 Each of Sonix Rectangular Silver Post Leg Table 1800x80...	No	15,028.00 EUR		[Action icons]
8000000219	11/03/25	Issued	None	1 Each of S1A Mesh Back Chair with Arms 5 Each of Gordy High Mesh Back Operator Chair (Adjustable... 100 Each of Sonix Rectangular Silver Post Leg Table 1800x80...	No	15,682.80 EUR		[Action icons]

04.a. How to Flip a Purchase Order into an Invoice (2/7)



Option A: Find the PO you wish to invoice and click on the **yellow coins** icon to flip your PO into an invoice:

8000000448	26/01/2026	Issued	None	5 Each of Executive / Management Development	No	57,501.25	
				5 Each of Corporate Entertainment		GBP	
				5 Each of Coaching Services			
				5 Each of Staff Rewards and Recognitions			

Yellow Coins



2

or

Supplier Auxiliary Part Number	Services Start Date						
None	dd/mm/yyyy						
4	Type	Item	Qty	Unit	Price	Total	Invoiced
		Staff Rewards and Recognitions	5	Each	3,600.00	18,000.00	0.00
Supplier Auxiliary Part Number	Services Start Date						
None	dd/mm/yyyy						

Per page 15 | 45 | 90

Total GBP 57,501.25

Create Invoice



Create Invoice

Save

Print View

Option B: Open the PO you wish to invoice by clicking on the PO number and click on the 'Create Invoice' button at the bottom of the PO:

04.a. How to Flip a Purchase Order into an Invoice (3/7)



A pop-up window will open

Which prompts you to select a legal entity (if you have more than one), the associated **Remit-to** and **Ship-From Address**. Click on **Save** after selecting them.

The screenshot shows a 'Choose Invoicing Details' pop-up window with the following fields and annotations:

- Legal Entity:** A dropdown menu showing '1023789-UAT_Supplier_3'. A blue box labeled 'Legal Entity' has an arrow pointing to this field.
- Invoice From:** A text field containing 'GBP-1023771', '1 Any Street, Willow Farm Business', 'London', 'London', 'EC4M 9BE', and 'United Kingdom'.
- Remit-To:** A dropdown menu showing 'GBP-1023771, 1 Any Street, W'. A blue box labeled 'Remit-To' has an arrow pointing to this field.
- Ship-From Address:** A dropdown menu showing 'GBP-1023771, 1 Any Street, W'. A blue box labeled 'Ship From' has an arrow pointing to this field.
- Buttons:** 'Cancel' and 'Save' buttons are at the bottom. A blue box labeled 'Save' has an arrow pointing to the 'Save' button.

A large blue circle with the number '3' is centered in the middle of the form, indicating the current step in the process.

NOTE: A legal entity is a representation of your company and gives BOI the information needed to do business with you, including addresses and payment methods. You may have several legal entities associated with your business. For example, if you have regional offices or subsidiaries which deal with your customers through Coupa, you may want to have more than one legal entity to better represent the structure of your organisation.

When you register with the Coupa Supplier Portal (CSP) for the first time, the onboarding assistant guides you through the creation of a legal entity and an associated payment method as part of the onboarding process.

If only one legal entity is registered during account creation, this pop-up will not appear, and you will be taken directly to the window shown in the next slide

04.a. How to Flip a Purchase Order into an Invoice (4/7)



Select customer Bank of Ireland

After clicking on **Save**, your invoice creation page will open, with the **From** section of the **header** already populated with the legal entity and remit-to details you selected. Fill in the remaining mandatory fields:

- Invoice #
- Invoice Date

The rest of the fields are optional. You may add attachments such as a delivery note or other supporting documents, but **we do not recommend adding your internal invoice**. Coupa uses **compliant invoicing**, ensuring that the system automatically checks and processes the invoice data for accuracy according to Ireland or UK requirements (depending on the location of the Legal Entity issuing the invoice) and **automatically generates a legal invoice PDF**.

Create Invoice cr Invoice #

General Info

* Invoice # 19022026 ✓

* Invoice Date 19/02/2026

* Payment Term 2030_30 days net no discount

Date of Supply 19/02/2026

* Currency GBP

Delivery Number

Status Draft

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

Cash Accounting Scheme

Margin Scheme

From

* Supplier 1023789-UAT_Supplier_3

* Supplier VAT ID GB168196135

* Invoice-From Address 1023789-UAT_Supplier_3
GBP-1023771
1 Any Street, Willow Farm Business
London
EC4M 9BE
United Kingdom
multi-RTA

* Remit-To Address 1023789-UAT_Supplier_3
GBP-1023771
1 Any Street, Willow Farm Business
London
EC4M 9BE
United Kingdom

* Ship-From Address 1023789-UAT_Supplier_3
GBP-1023771
1 Any Street, Willow Farm Business
London
EC4M 9BE
United Kingdom

To

Customer Bank of Ireland

* Bill-To Address 2 College Green
Dublin, D02 VR86
Ireland

* Buyer VAT IDVAT IE8Y42002P

Ship to Address 2 College Green
Dublin, D02 VR86
Ireland

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NOTE: You cannot backdate your invoice by more than 1 day, otherwise your submission will be blocked, as payment terms are calculated from the invoice date.

04.a. How to Flip a Purchase Order into an Invoice (5/7)



At the line level of the invoice

The **Quantity**, **UOM** and **Price** are taken directly from the PO upon flipping, so you only need to select the **VAT rate** for each line from the dropdown menu. The **Qty** field is editable because if you are issuing a partial invoice (e.g. for partial deliveries) you may want to adjust it.

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VAT Rate

Lines

Type	Description	Qty	UOM	Price	
	Executive / Management Development	5	Each	3,400.25	17,001.25

PO Line: 8000000448-1
Contract: UAT_Supplier_3 - Standard St
Supplier Part Number: UAT 28
Services Start Date: dd/mm/yyyy

Services End Date: None
Billing: K-FA1148-4503035

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	3,400.25	

Type: Description: Corporate Entertainment Qty: 5 UOM: Each Price: 3,600.00 Total: 18,000.00

PO Line: 8000000448-2
Contract: UAT_Supplier_3 - Standard St
Supplier Part Number: UAT 34
Services Start Date: dd/mm/yyyy

Services End Date: None
Billing: K-FA1148-4303100

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	3,600.00	

May be adjusted – for partial invoices

04.a. How to Flip a Purchase Order into an Invoice (6/7)



After selecting the VAT rate and making sure all the other information on the invoice is correct

Scroll down and click on **Calculate** for the VAT Rate to be added to your total and then click on **Submit**:

You will be prompted to confirm that you are ready to send the invoice:

Total Taxes	
Lines Net Total	57,501.25
Lines VAT Totals	11,500.25
<hr/>	
Total VAT	11,500.25
Net Total	57,501.25
Gross Total	69,001.50

6 **7**

Are You Ready to Send? ✕

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.

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04.a. How to Flip a Purchase Order into an Invoice (7/7)



After clicking on Send Invoice

If all details are correct, you will receive confirmation that the invoice has been submitted:

1023769-UAT_Supplier_3 invoice #19022026 is processing



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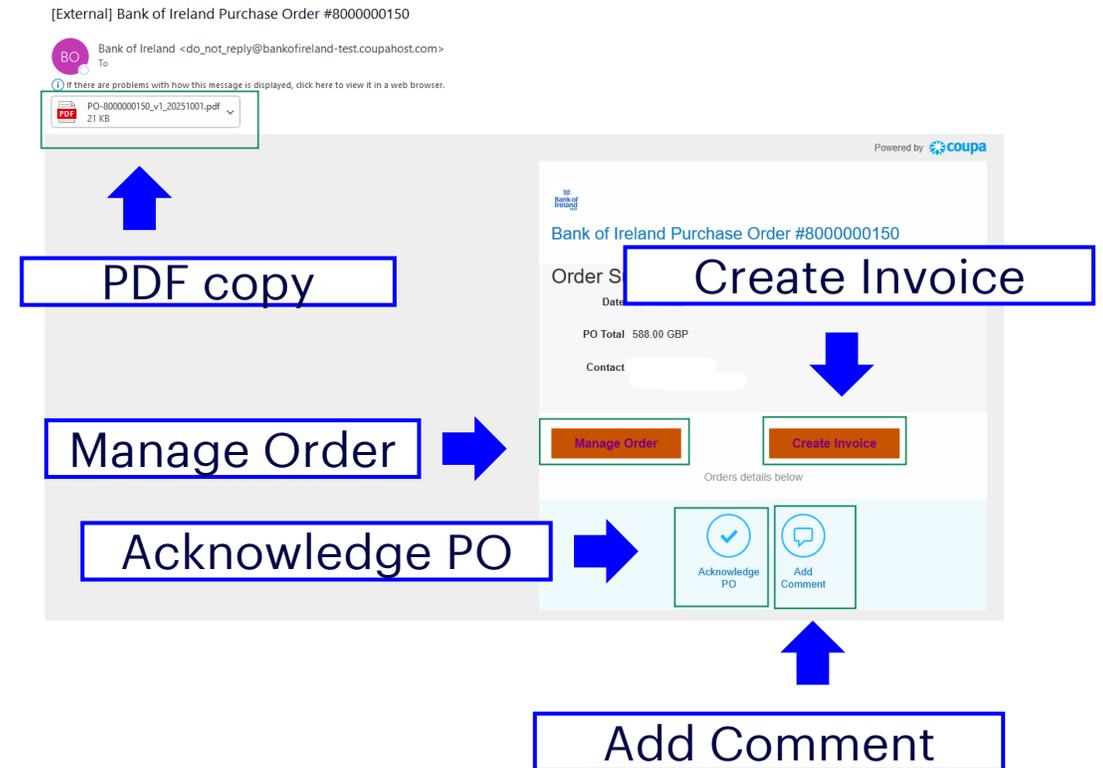
04.b. How to Manage a PO/Create an Invoice without Logging into your CSP Account



When BOI issues a PO

You will be notified via a Supplier Actionable Notification (SAN) email. This contains a PDF copy of the order, as well as **several buttons** allowing you to take actions without logging into your CSP account:

- ❑ **Manage Order:** Clicking this takes you to the CSP, where you can view and manage all order details. You'll need to log in to make changes, but you can access everything related to the PO here.
- ❑ **Create Invoice:** This button allows you to directly create an invoice for the PO without logging into CSP. Clicking it will take you to the invoice creation page, pre-populated with the PO details.
- ❑ **Acknowledge PO:** By clicking this, you can quickly confirm that you've received and are accepting the PO, without needing to log in. This action updates the PO status to "Acknowledged" in the system.
- ❑ **Add Comment:** This option lets you add comments to the PO directly from the SAN email. If you have any notes or need to clarify something, you can submit them right away without logging into your account.



04.c. How to Correct a Disputed Invoice with a Credit Note (1/4)



- ❑ Log in to your CSP account (<https://supplier.coupahost.com/sessions/new>),
- ❑ Go to the **Invoices** tab
- ❑ Find the disputed invoice you want to correct and click on the **Resolve** icon

The screenshot shows the Coupa Supplier Portal interface. The 'Invoices' tab is highlighted with a blue box and a blue arrow. A blue circle with the number '1' is next to it. Below the navigation bar, there is a section for 'Instructions From Customer' and a table of invoices. The table has columns for Invoice #, Invoice Date, PO #, Total, Disputed Date, Commented, Dispute Reason, Comments, and Actions. The third row of the table is highlighted, and the 'Resolve' icon in the 'Actions' column is highlighted with a blue box and a blue arrow. A blue circle with the number '2' and a label 'Resolve Icon' is next to it.

Invoice #	Invoice Date	PO #	Total	Disputed Date	Commented	Dispute Reason	Comments	Actions
20251009#003	10/09/25	None	1,230.00 EUR	10/09/25	None	Goods/Service pending delivery		
20261006#005	10/06/25	None	28,290.00 EUR	10/06/25	None	Goods/Service pending delivery		
20251006#010	10/05/25	8000000168	26,105.00 EUR	10/07/25	None	Goods/Service pending delivery		

04.c. How to Correct a Disputed Invoice with a Credit Note (2/4)



Your invoice page will open with instructions regarding resolution options

Please review the invoice and determine the resolution option: ▼

Cancel Invoice
If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancellation credit note and a replacement invoice creation.

Adjust
If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.

Click on the button of your choice at the bottom of the invoice, depending on the selected option:



Options



04.c. How to Correct a Disputed Invoice with a Credit Note (3/4)



A credit note page will open in each case:

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Credit Note #
Credit Note Date

Either for the complete cancellation of the invoiced amount (for the **Cancel Invoice** option) or for adjusting either the price or the quantity on the invoice (for the **Adjust** option).

At the header level of the credit note you need to complete the mandatory fields highlighted below:

Credit Reason

Create Credit Note Create

This credit note applies to invoice 20251006#010. When approved, the credit will adjust the invoice's impact to the transaction.

General Info

* Credit Note # Corrected Inv 20251006#010 ✓

* Credit Note Date 12/22/25

* Payment Term

Original Date of Supply 12/22/25

* Currency EUR

Delivery Number

Status Draft

Original Invoice # 20251006#010

Original Invoice Date 10/05/25

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

Supplier Note

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

Cash Accounting Scheme

* Credit Reason qty difference

Margin Scheme

Pre-Payment Date mm/dd/yy

Endorsement On Invoices

New Means Of Transport

From

* Supplier Kepner-Tregoe (Ireland) Ltd (Euro)

* Supplier VAT ID IE8273727V

* Invoice From Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

* Remit-To Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

* Ship From Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

To

Customer Bank of Ireland

* Bill To Address 2 College Green
Dublin, D02 VR86
Ireland

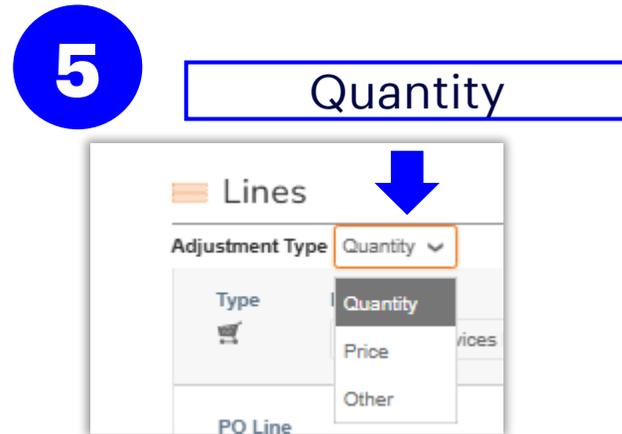
* Buyer VAT ID IE8Y42002P

Ship to Address 2 College Green
Dublin, D02 VR86
Ireland

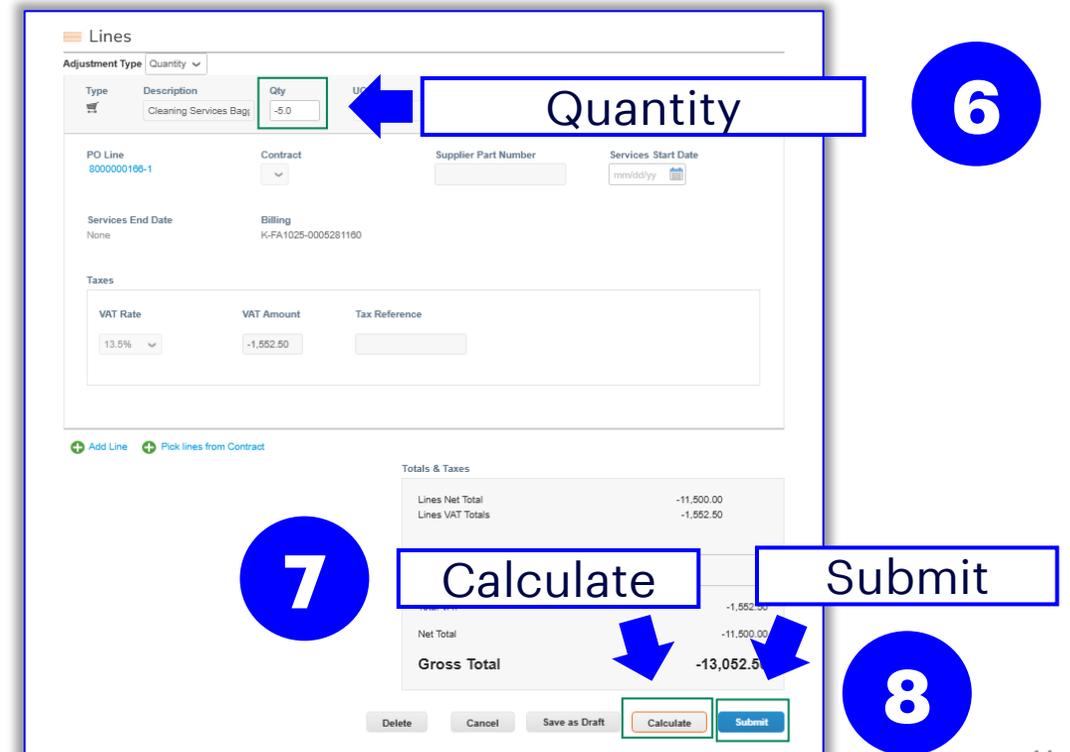
04.c. How to Correct a Disputed Invoice with a Credit Note (4/4)



At line level you do not need to change anything if you want to completely cancel the invoice. If you choose to adjust the invoice, you will need to select the adjustment type:



Depending on the selected adjustment type, that will be the only editable field at line level. In this example, a quantity adjustment was made. Click on **Calculate** to apply your adjustment and then on **Submit** to send the credit note:



NOTE: Credit Note amounts will always be negative.

04.d. How to Create a Credit Note from a Purchase Order (1/3)



Credit notes can also be created directly from a PO without requiring a disputed invoice (e.g. to account for a rebate). The condition is to have submitted an invoice for the relevant PO, prior to creating the credit note.

- ❑ Log into your CSP account (<https://supplier.coupahost.com/sessions/new>)
- ❑ Go to the **Orders** tab
- ❑ Find the relevant purchase order and click on the red coins icon to create the credit note

The screenshot shows the Coupa Supplier Portal interface. The 'Orders' tab is highlighted in the top navigation bar. Below the navigation bar, the 'Purchase Orders' section is visible. A table lists several purchase orders with columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. A blue box labeled 'Orders' is positioned over the 'Orders' tab. A blue circle with the number '1' is next to the 'Orders' tab. A blue arrow points to the 'Orders' tab. Another blue arrow points to the red coins icon in the 'Actions' column of a purchase order row. A blue circle with the number '2' is next to the red coins icon. A blue box labeled 'Red coins icon' is also present.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
8000000283	12/15/25	Issued	None	Contract service line 1	No	1,000.00 EUR		
8000000248	12/05/25	Issued	None	Contract service line 1	No	1,000.00 EUR		
8000000237	11/27/25	Issued	None	test TCR reverse charge test TCR exempt test TCR commodity, exempt	No	15,000.00 EUR		
8000000230	11/14/25	Issued	None	test TCR	No	5,000.00 EUR		
8000000220	11/04/25	Issued	None	1 Each of Gordy High Mesh Back Operator Chair (Adjustable... 100 Each of Sonix Rectangular Silver Post Leg Table 1800x80...	No	15,028.00 EUR		
8000000219	11/03/25	Issued	None	1 Each of S1A Mesh Back Chair with Arms 5 Each of Gordy High Mesh Back Operator Chair (Adjustable... 100 Each of Sonix Rectangular Silver Post Leg Table 1800x80...	No	15,682.80 EUR		
8000000214	10/30/25	Issued	None	1 Each of S1A Mesh Back Chair with Arms 5 Each of Gordy High Mesh Back Operator Chair (Adjustable... 100 Each of Sonix Rectangular Silver Post Leg Table 1800x80...	No	15,682.80 EUR		

04.d. How to Create a Credit Note from a Purchase Order (2/3)



Same as for invoice creation, you will need to select the appropriate **Legal Entity**, **Remit-To** and **Ship-From Address** and click on **Save**:

3 Legal Entity

Choose Invoicing Details

* Legal Entity 1003615 [Add New](#)

Invoice From Alexandra House
Dublin 4, Dublin D22 A41
Ireland
Ireland (IE8273727V)

* Remit-To Alexandra House, Dublin 4, Du [Add New](#)

* Ship From Address Alexandra House, Dublin 4, Du [Add New](#)

Remit-To

Ship From

Cancel Save

At the header level of the credit note, fill in the mandatory fields (*) highlighted below:

4

Create Credit Note Create

General Info

* Credit Note # CN Inv 12222025 ✓

* Credit Note Date 12/23/25

Payment Term 2030_30 days net no discount

Original Date of Supply 12/23/25

* Currency EUR

Delivery Number

Status Draft

* Original Invoice # 12222025

* Original Invoice Date 12/22/25

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

Supplier Note

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

Cash Accounting Scheme

* Credit Reason Agreed rebate

Margin Scheme

Pre-Payment Date mm/dd/yy

Endorsement On Invoices

New Means Of Transport

From

* Supplier Kepner-Tregoe (Ireland) Ltd (Euro)

* Supplier VAT ID IE8273727V

* Invoice From Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

* Remit-To Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

* Ship From Address Kepner-Tregoe (Ireland) Ltd (Euro)
Alexandra House
Dublin 4, Dublin D22 A41
Ireland

To

Customer Bank of Ireland

* Bill To Address 2 College Green
Dublin, D02 VR86
Ireland

* Buyer VAT ID IE8Y42002P

Ship to Address 2 College Green
Dublin, D02 VR86
Ireland

04.d. How to Create a Credit Note from a Purchase Order (3/3)



At the line level, select the Adjustment Type

Amend the relevant field according to the selected adjustment type (in this example the Price field), select the **VAT rate**, click on **Calculate** to apply adjustments to the total and click on **Submit** to send your credit note.

Adjustment Type: Quantity

Type	Description	Qty	UOM	Price	Total
	Gordy High Mesh Back Operator Chair (Adjustable Arms)	-5.0	Each	128.00	640.00

PO Line: 800000219-2
Contract: [dropdown]
Supplier Part Number: 103262BN
Services Start Date: [calendar icon]

Services End Date: None
Billing: K-FA1025-0005281160

Taxes

VAT Rate	VAT Amount	Tax Reference
[dropdown]	0.00	[input field]

Lines

Adjustment Type: Price

Type	Description	Qty	UOM	Price	Total
	S1A Mesh Back Chair with Arms	1.000	Each	130.00	130.00

PO Line: 800000219-1
Contract: [dropdown]
Supplier Part Number: 12075X
Services Start Date: [calendar icon]

Services End Date: None

Taxes

VAT Rate	VAT Amount	Tax Reference
23.0%	29.90	[input field]

To remove lines

VAT rate

6

Submit

8

7

Calculate

NOTE: If your PO has several lines and the credit note adjustment only applies to one line, remove the rest of the lines.