

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



**Bank of
Ireland
Group**



Contents

04.a. How to Flip a Purchase Order into an Invoice

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

04.c. How to Correct a Disputed Invoice with a Credit Note

04.d. How to Create a Credit Note from a Purchase Order

04.a. How to Flip a Purchase Order into an Invoice (1/8)



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

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		

04.a. How to Flip a Purchase Order into an Invoice (2/8)



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

8000000687	29/04/2026	Issued	None	January	No	15,000.00 EUR	
				February			
				March			
				April			
				May			
				June			

Yellow Coins



2

or

12	Type	Item	Price	Total	Invoiced
		December	1,250.00	1,250.00	0.00

Supplier Auxiliary Part Number: None
Services Start Date: dd/mm/yyyy

Per page 15 | 45 | 90

Total 15,000.00
EUR

Create Invoice

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 (3/8)



A pop-up window will open

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

Choose Invoicing Details ✕

not set up for it.

* Legal Entity ← Legal Entity

Invoice From EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
United Kingdom (GB168196135)

* Remit-To ← Remit-To

* Ship-From Address

3

Cancel ← Save

NOTE: A legal entity represents your company and provides Bank of Ireland (BOI) with the information needed to do business with you, such as addresses and payment details. You may have several legal entities associated with your business. For Bank of Ireland, **one legal entity equals one vendor ID**. However, if you use the same Coupa Supplier Portal account for other customers or parts of your organisation, you may need **multiple legal entities in CSP** to reflect your company structure.

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 (4/8)



After clicking on **Save**, your invoice creation page will open, with the **From** section of the **header** already populated with the **Invoice-From Address** and **Ship-from Address** details you selected.

NOTE: if you have a single legal entity in your CSP account, the pop-up window mentioned in the previous slide will not come up, and in that case the **'Remit-To Address'** might say *'No Address Selected'*.

In that case click on the magnifying glass icon:

* Remit-To Address No address selected 

and select the relevant Bank account details in the pop-up window that comes up:

Choose Invoicing Details

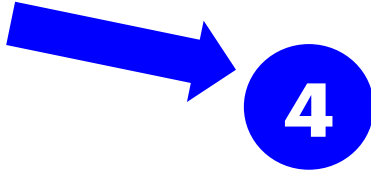
customer is not set up for it.


* Legal Entity 1023769-UAT_Supplier_3 (EUF)

Invoice From EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
United Kingdom (GB168196135)

* Remit-To


* Ship-From Address EUR-1023769, 1 Any Street, Lc





 **From**

* Supplier UAT_Supplier_3 - 1023769

* Supplier VAT ID

* Invoice-From Address 1023769-UAT_Supplier_3 (EUR) 
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
multi-RTA

* Remit-To Address No address selected 

* Ship-From Address 1023769-UAT_Supplier_3 (EUR) 
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

04.a. How to Flip a Purchase Order into an Invoice (5/8)



At the header level of the invoice

Once you make sure the Remit-To Address is selected, fill in:

- Invoice #
- Invoice Date

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.

- Exchange Rate – only mandatory if the invoice currency is different from the supplier country currency. You can put a dummy value of “1” as it will not impact payments. Payments will be made in the invoice currency;

NOTE: The rest of the fields are optional. You may add attachments such as supporting documents if needed, **but we do not require you to add 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.

5

Invoice #

Invoice Date

Exchange Rate (if mandatory)

General Info

- * Invoice # 12345
- * Invoice Date 30/04/2026
- * Payment Term Z030_30 days net no discount
- Date of Supply 30/04/2026
- Delivery Number
- Status Draft
- Image Scan Choose File No file chosen
- Supplier Note
- Attachments Add File | URL | Text
- Cash Accounting Scheme
- Margin Scheme
- * Exchange Rate 1

From

- * Supplier UAT_Supplier_3 - 1023769
- * Supplier VAT ID GB168196135
- * Invoice-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
multi-RTA
- * Remit-To Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
- * Ship-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

04.a. How to Flip a Purchase Order into an Invoice (6/8)



At the line level of the invoice

The **Description** 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, if you are invoicing the full price of the PO line.

For **partial invoices**, the **Price** can be edited to reflect only the price you need to invoice.

Unnecessary invoice lines may also be completely removed from the current invoice (e.g. for PO month lines not yet due for invoicing) by clicking the 'x' next to the unnecessary invoice line.

6

VAT Rate

May be edited – for partial invoicing

Unnecessary invoice lines may be removed

Type	Description	Price	
	January	1,250.00	1,250.00
PO Line	Contract	Supplier Part Number	Services Start Date
8000000687-1	UAT_Supplier_3 - Standard St		dd/mm/yyyy
Services End Date	Billing		
None	K-CC5011-4410020		
Taxes			
VAT Rate	VAT Amount	Tax Reference	
20.0%	250.00		
Type	Description	Price	
	February	1,000	1,250.00
PO Line	Contract	Supplier Part Number	Services Start Date
8000000687-2	UAT_Supplier_3 - Standard St		dd/mm/yyyy
Services End Date	Billing		
None	K-CC5011-4410020		
Taxes			
VAT Rate	VAT Amount	Tax Reference	
20.0%	250.00		

04.a. How to Flip a Purchase Order into an Invoice (7/8)



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		1,000.00
Lines VAT Totals		200.00
<hr/>		
Total VAT	200.00 GBP	200.00 EUR
Net Total	1,000.00 GBP	1,000.00 EUR
Gross Total	1,200.00 GBP	1,200.00 EUR

Delete

Cancel

Save as draft

Calculate

Submit

7

8

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.

Continue Editing

Send Invoice

9

04.a. How to Flip a Purchase Order into an Invoice (8/8)



After clicking on Send Invoice

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

UAT_Supplier_3 - 1023769 invoice #12345 is processing



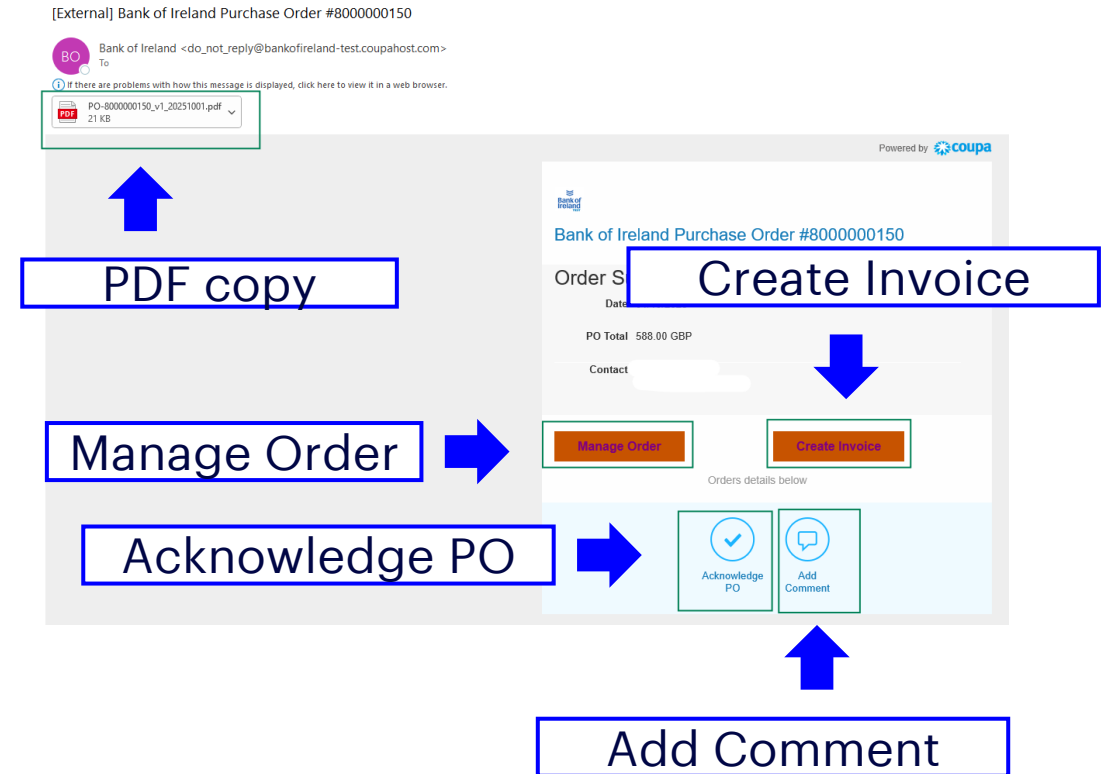
04.b. How to Manage a PO/Create an Invoice without Logging into your CSP Account



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 (1/6)



When you are notified that your invoice has been disputed and needs correction, you need to **offset it with a credit note** before being able to create the corrected invoice.

- ❑ 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

Supplier Portal

Invoices Orders Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogues Community Add-ons Dashb

Invoices Invoices Lines Payment Receipts

Select customer Bank of Ireland

Invoices

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 Invoice list page)
Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Invoice #	Invoice Date	PO #	Gross Total	Disputed Date	Commented	Dispute reason	Comments	Actions
test_bank_rta3	05/05/2026	8000000696	10,000.00 GBP	05/05/2026	None	Duplicate Invoice. Already paid or payment review in progress		
NpOline1	03/05/2026	8000000695	200.00 EUR	03/05/2026	None	Quantity does not match the quantity from PO, Contract or Catalogue		
Inv1Scen4	30/04/2026	8000000693	10,000.00 EUR	30/04/2026	None	Tax rate not provided or incorrect		

2

Resolve Icon

04.c. How to Correct a Disputed Invoice with a Credit Note (2/6)



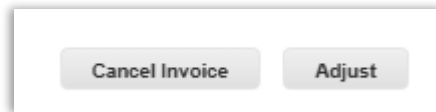
Your invoice page will open with instructions regarding resolution options

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 cancelation 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 (3/6)



A credit note page will open in each case:

4

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 here:

Credit Reason

Create Credit Note [Create](#)

This credit note applies to invoice 12345. When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* Credit Note # CN12345 ✓

* Credit Note Date 06/05/2026

* Payment Term Z030_30 days net no discount

Original Date of Supply 06/05/2026

* Currency EUR

Delivery Number

Status Draft

Original Invoice Number 12345

Original Invoice Date 05/05/2026

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

Supplier Note

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

Cash Accounting Scheme

* Credit Reason Tax rate incorrect

From

* Supplier UAT_Supplier_3 - 1023769

* Supplier VAT ID GB168196135

* Invoice-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
multi-RTA

* Remit-To Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

* Ship-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

To

04.c. How to Correct a Disputed Invoice with a Credit Note (4/6)



At line level you do not need to change anything if you want to completely cancel the invoice. Simply click **'Submit'** to send the Credit Note:

NOTE: Credit Note amounts will always be negative.

After clicking **'Submit'** a pop-up will appear reminding you attachments are not needed. Click **'Send Credit Note'** to proceed:

Lines

Adjustment Type Price

Type	Description	Price	
	January	-1,250.00	-1,250.00

PO Line: 8000000686-1

Contract: UAT_Supplier_3 - Standard St

Supplier Part Number: [input]

Services Start Date: dd/mm/yyyy

Services End Date: None

Billing: K-CC5011-4410020

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	-250.00	[input]

Total Taxes

Lines Net Total	-1,250.00
Lines VAT Totals	-250.00
Total VAT	-250.00 GBP -250.00 EUR
Net Total	-1,250.00 GBP -1,250.00 EUR
Gross Total	-1,500.00 GBP -1,500.00 EUR

Are you ready to send?

Coupa is about to create a credit note on your behalf. Please make sure you are not attaching another credit note to this transaction as the Coupa-generated credit note is your and your customer's legal credit note.

Continue Editing **Send Credit Note**

Contract Supplier Part Number Services



Delete Cancel Save as draft Calculate **Submit**

04.c. How to Correct a Disputed Invoice with a Credit Note (5/6)



You will then be asked if you want to create a replacement invoice for the one that you just cancelled. Click on 'Yes' to proceed.

Create Replacement Invoice ✕

Do you want to create a new invoice to replace the one you just cancelled?

No Yes

NOTE: If the **credit note has not been approved yet**, you might be getting an **error** when trying to submit the corrected invoice because the remaining balance you can invoice against hasn't been reset. In that case you need to save your draft invoice and **wait for the credit note to be approved** before you can submit your corrected invoice.

Fill out the mandatory fields in the header of the invoice (marked with *):



Create Invoice Create

This invoice is a correction for invoice 123456 that was cancelled by credit note CN123456.

General Info

- * Invoice # Corrected 123456
- * Invoice Date 05/05/2026
- * Payment Term Z030_30 days net no discount
- Date of Supply 05/05/2026
- * Currency EUR
- Delivery Number
- Status Draft
- Image Scan Choose File No file chosen
- Supplier Note
- Attachments ? Add File | URL | Text
- Cash Accounting Scheme
- Margin Scheme
- * Exchange Rate ? 1

From

- * Supplier UAT_Supplier_3 - 1023769
- * Supplier VAT ID GB168196135
- * Invoice-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
multi-RTA
- * Remit-To Address 1023769-UAT_Supplier_3 (EUR)
1 Any Street
London
EC4M 9BE
United Kingdom
- Bank Name: Any Bank
- Beneficiary Name: 1023769-UAT_Supplier_3 (EUR)
- Bank Account Number: ****0000
- Sort Code: **0000
- * Ship-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

04.c. How to Correct a Disputed Invoice with a Credit Note (6/6)



At line level, correct the wrong information from the previous invoice. This could be the line price or the selected VAT rate or removing unnecessary extra lines etc.

In the example below the wrong VAT rate was selected in the previous invoice, so this is what is being corrected, while the net price remains unchanged. Click on **Calculate** to apply the new VAT rate or price and then **Submit** to send the corrected invoice.



Lines

Type	Description	Price	
	January	1,250.00	1,250.00

PO Line: 800000686-1
Contract: UAT_Supplier_3 - Standard St
Supplier Part Number:
Services Start Date: dd/mm/yyyy

Services End Date: None
Billing: K-CC5011-4410020

Taxes

VAT Rate	VAT Amount	Tax Reference
Reverse	0.00	<input type="text"/>

[+ Add Line](#) [+ Pick lines from Contract](#)

Total Taxes

Lines Net Total	1,250.00
Lines VAT Totals	0.00

Total VAT	0.00 GBP	0.00 EUR
Net Total	1,250.00 GBP	1,250.00 EUR
Gross Total	1,250.00 GBP	1,250.00 EUR



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. The condition is to have submitted an invoice for the relevant PO, prior to creating the credit note. The invoice can be in **Pending Approval** or **Approved** status.

- ❑ 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 selected and highlighted with a blue box and a blue circle containing the number '1'. A blue arrow points to the 'Orders' tab. Below the 'Orders' tab, there is a table of Purchase Orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The 'Actions' column contains a red coins icon, which is highlighted with a blue box and a blue circle containing the number '2'. A blue arrow points to the red coins icon. The table contains several rows of purchase orders, including PO 800000283, 800000248, 800000237, 800000230, 800000220, 800000219, and 800000214.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
800000283	12/15/25	Issued	None	Contract service line 1	No	1,000.00 EUR		
800000248	12/05/25	Issued	None	Contract service line 1	No	1,000.00 EUR		
800000237	11/27/25	Issued	None	test TCR reverse charge test TCR exempt test TCR commodity, exempt	No	15,000.00 EUR		
800000230	11/14/25	Issued	None	test TCR	No	5,000.00 EUR		
800000220	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		
800000219	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		
800000214	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** and **Remit-To** and click on **Save**:

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

3

Choose Invoicing Details **Legal Entity**
customer is not set up for it.

* Legal Entity 1023769-UAT_Supplier_3 (EUR)

Invoice From EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
United Kingdom (GB168196135)

* Remit-To Any Bank ***000 (1 Any Street,)

* Ship-From Address EUR-1023769, 1 Any Street, Lc

Cancel Save

Save

4

Create Credit Note Create

General Info

* Credit Note # CN1234567 ✓

* Credit Note Date 07/05/2026

* Payment Term 2030_30 days net.no discount

Original Date of Supply 07/05/2026

* Currency EUR

Delivery Number

Status Draft

* Original Invoice Number 1234567

* Original Invoice Date 07/05/2026

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

Cash Accounting Scheme

* Credit Reason

Margin Scheme

* Exchange Rate 1

From

* Supplier UAT_Supplier_3 - 1023769

* Supplier VAT ID GB168196135

* Invoice-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom
multi-RTA

* Remit-To Address 1023769-UAT_Supplier_3 (EUR)
1 Any Street
London
EC4M 9BE
United Kingdom

Bank Name: Any Bank

Beneficiary Name: 1023769-UAT_Supplier_3 (EUR)

Bank Account Number: ****0000

Sort Code: **0000

* Ship-From Address 1023769-UAT_Supplier_3 (EUR)
EUR-1023769
1 Any Street
London
EC4M 9BE
United Kingdom

To

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



At the line level

Amend the price field if needed (if you are issuing a partial credit note), select the **VAT rate**, click on **Calculate** to apply adjustments to the total and click on **Submit** to send your credit note.

Adjustment Type: Price

Type	Description	Price
	February	-1,250.00

PO Line: 8000000685-2
Contract: UAT_Supplier_3 - Standard St
Supplier Part Number:
Services Start Date: dd/mm/yyyy

Services End Date: None
Billing: K-CC5011-4410020

Taxes

VAT Rate	VAT Amount	Tax Reference
Reverse	0.00	<input type="text"/>

Adjustment Type: Price

Type	Description	Price
	January	-1,250.00

PO Line: 8000000685-1
Contract: UAT_Supplier_3 - Standard St
Supplier Part Number:
Services Start Date: dd/mm/yyyy

Services End Date: None
Billing: K-CC5011-4410020

Taxes

VAT Rate	VAT Amount	Tax Reference
Reverse	0.00	<input type="text"/>

To remove unnecessary lines

VAT rate

Total Taxes

Lines Net Total	-1,250.00
Lines VAT Totals	0.00
Total VAT	
Net Total	-1,250.00 GBP -1,250.00 EUR
Gross Total	-1,250.00 GBP -1,250.00 EUR

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

Buttons: Delete, Cancel, Save as draft, Calculate, Submit

7

Calculate