Coupa Supplier Actionable Notification

How to Create an Invoice

19 Mar., 2019

Creating an invoice via SAN

The SAN is the Purchase Order e-mail you received from Trane Technologies.

When you receive the Supplier Actionable Notice, it will look similar to this:

Create Invoice	Acknowledge PO	Add Comment
Create Account		

PURCHASE ORDER

Test Supplier
800 Beaty St
Davidson, NC 28115
Buyer@irtrane.com

PO NUMBER	CPO-10008499
DATE	02/22/19
PAYMENT TERMS	Net30
SHIPPING TERMS	FOB DESTINATION
CURRENCY	USD
CONTRACT	
CONTACT	Buyer

Bill To
Trane U.S. Inc
Electronic Invoices Only
Invoicing instructions at link below,
United States

800-E Beaty Street
Box 940
Davidson, NC 28036
USNCDA05

Line	Description	Qty	Unit	Price	Total
1	Product #1			75,000.00	75,000.00
	02/28/19				

75,000.00 USD

- First click the "Create Invoice" button at the top of the SAN you received.
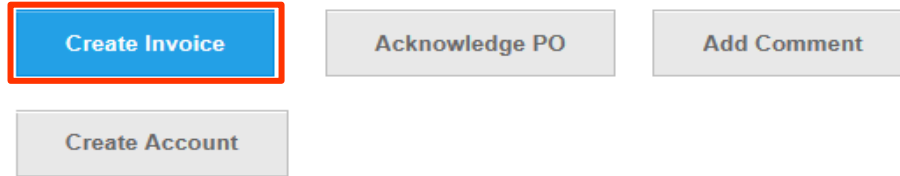
- This will bring you into the invoice screen.

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- Fill out all fields marked with the red *
  - a. Make sure you select or enter your address when prompted by the pop up box
  - b. If you missed this or forgot, you can click the little magnifying glass to the right of the address fields

  * Invoice From Address   No address selected ⟵

- Attach a PDF copy of your invoice in the "Image Scan" field

  Image Scan [   ] Browse...

  - Click Browse
  - Select your file
  - Click Open

- Go to the "Lines" section of the invoice. Here you will update the value being invoiced.
  - If you have an Amount based PO update the amount shown with the amount you are invoicing in the "Price" field.
    - Delete the value shown and enter your invoice amount

  ≡ Lines

Type	Description	Price
	2018 Annual PO - Le	36,428.60 ⟵

  - If you have a Quantity based PO update the quantity shown with the quantity you are invoicing in the "Qty" field.

  ≡ Lines

Type	Description	Qty	UOM	Price
	Product	36	Each ⌄	54.25

  - No other change are needed in the Lines Section.

- Scroll to the bottom of the page to the Totals and Taxes section.
  - If you need to enter sales tax enter the % and do not select from the drop down.
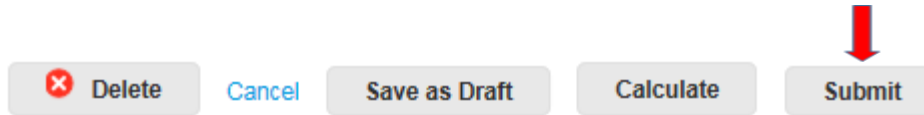 - If no sales tax is required, you can skip this step.

- Click the calculate button just under the Totals and Tax section
  - This will update the total value being invoiced based on the amount in the "Price" field above and any additional charges entered into the Totals and Tax section.

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- Click the submit button.

- Click the "Send Invoice" button in the pop up.

- Congratulations, your invoice is now submitted

Create Invoices ⓘ

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

| | | | | | View Pending Approval ⌄ | Search 🔍 |

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
123456	02/22/19	Pending Approval	CPO-10008499	75.00 USD	No	
Inv-66	02/22/19	Pending Approval	CPO-10008499	87,000.00 USD	No	

Per page 15 | 45 | 90

- Once invoices have been reviewed/received/approved the status will update to Approved or Disputed.

Creating Invoices via SAN

- After you click Submit, the page will refresh and display the invoice **Status.**
- After the invoice is in **Approved** status, it will be paid according to the payment terms and payment schedule contractually agreed upon between Trane Technologies and the supplier.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
911806	08/06/18	Processing	CPO-10000207	0.00 USD	No	
3489r18	08/06/18	Approved	CPO-10000207	500.00 USD	No	
None	08/06/18	Draft	CPO-10000207	500.00 USD	No	✏️ ❌
None	08/06/18	Draft	CPO-10000207	500.00 USD	No	✏️ ❌
Test 806	08/06/18	Draft	CPO-10000207	500.00 USD	No	✏️ ❌
Test12345	08/06/18	Draft	CPO-10000207	500.00 USD	No	✏️ ❌
None	08/06/18	Draft	CPO-10000207	500.00 USD	No	✏️ ❌

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Search

Per page 15 | 45 | 90