

FUSION



COUPA TRAINING

Coupa Supplier Portal (CSP)

GLENCORE

05

Create an invoice from a contract

GLENCORE



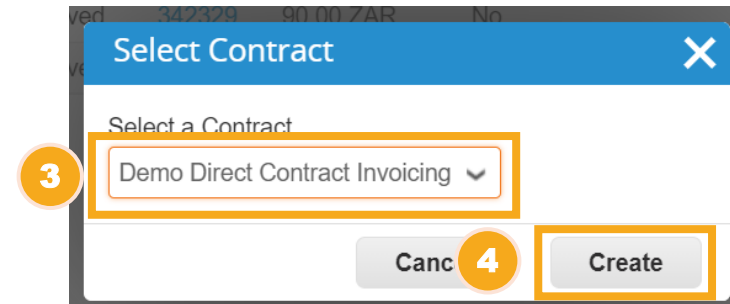
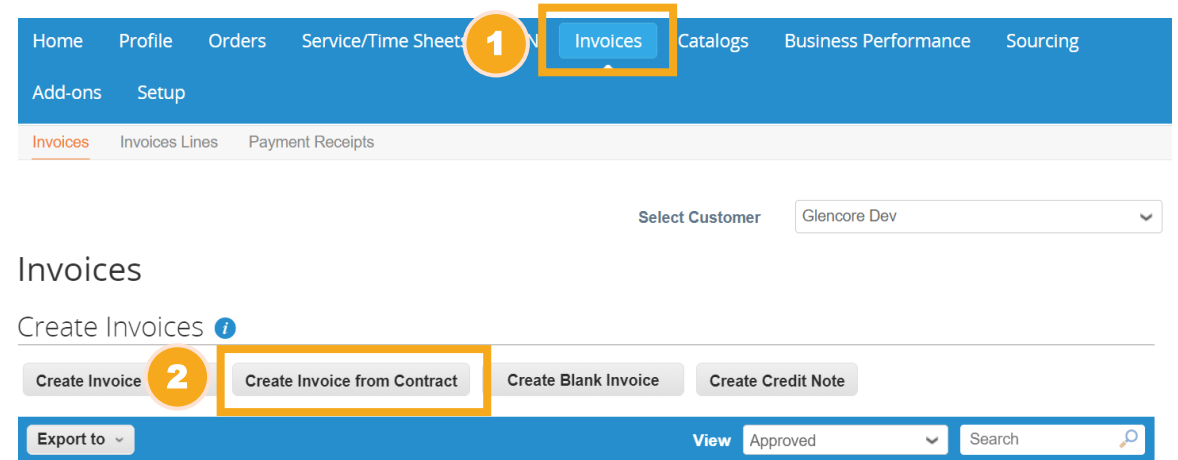
5.1 CREATE AN INVOICE FROM A CONTRACT

In this section you will learn how to create an invoice from a contract through the supplier portal. This section will only be available if you meet some requirements requested by Glencore and works only for services.

- 1 Go to the invoices tab
- 2 Click on the option to create an invoice from a contract
- 3 Search for the contract you wish to generate the invoice for
- 4 To create the invoice, click on create



NOTE: The contracts you have with Glencore will appear in the drop-down list. This option will not always be enabled



5.2 CREATE AN INVOICE FROM A CONTRACT

In this section the creation of the invoice will take place

5 Complete the information in the general information section. In scanned images and attachments you must attach the graphic representation or PDF of the invoice and the dispatch or delivery fulfilment and/or service record approved by the administrator.

In the Currency option you can select the type of currency in which you want to invoice in

6 Verify the information related to the supplier's name and addresses.

7 Complete the information in the To section. You must be the administrator of the Glencore contract.




NOTE: Remember to attach the files requested in the image and attachments section. you will not be able to send the invoice if you do not have attachments.


Create Invoice Create

5 **General Info**

* Invoice #

* Invoice Date 08/06/21 

Payment Term None

* Currency USD 

Status Draft

Contract Demo Direct Contract Invoicing


Attach Copy Of Invoice Here No file chosen


Supplier Note


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

6 **From**

* Supplier TriForce Supplier

* Invoice From Address TriForce Services 
Test
Test, NY 10001
United States

* Remit-To Address TriForce Services 
Test
Test, NY 10001
United States

* Ship From Address TriForce Services 
Test
Test, NY 10001
United States

7 **To**

Customer Glencore Dev

* Requester Email


* Requester Name

5.3 CREATE AN INVOICE FROM A CONTRACT

8 Section where you will find the lines or items associated to the invoice. Complete information if necessary.

a You have the option to select tax at the line level. If you select this option, you will have to specify tax for each line of the invoice

b Use this option to add lines from the contract in this invoice


c To add items from the contract, click 



d Once the lines are added, click finish



NOTE: In the description field you must enter the service you provided, its respective quantity and price. This information will be verified by Glencore to continue with the invoicing.

8 **Lines** **a** Line Level Taxation


Type	Description	Qty	UOM	Price	
Qty ▾	<input type="text"/>	1.000	Year ▾	0.00	0.00 
PO Line None	Service/Time Sheet Line None	Supplier Part Number <input type="text"/>			


b  Add Line  Pick lines from Contract


Totals & Taxes





Pick Lines from Contract

Invoice #

Line	Desc	Total
1	RELAY,O/L,SWH,EVALUATOR,LD SENSG (GZ-121...	4,154.00 

1 Lines  Delete Invoice **Finish**

View All ▾ **Advanced** Search 

Name	Contract Name	Contract #	Part Number	Auxiliary Part Number	Price	Actions
RELAY,PROTV,RECTR,MSR AMPR,110 V (GZ-1218854)	GZ-2200-1070694-GDSR-AAA	7611	None	None	3,990.00	
RELAY,O/L,SWH,EVALUATOR,LD SENSG (GZ-1218856)	GZ-2200-1070694-GDSR-AAA	7611	None	None	4,154.00	
SET,PRT (GZ-1218857)	GZ-2200-1070694-GDSR-AAA	7611	None	None	2,789.00	
TRANSMITTER,LVL,GUID WVE RDR,+/-0.2 IN (GZ-1218862)	GZ-2200-1070694-GDSR-AAA	7611	None	None	4,411.00	

5.4 CREATE AN INVOICE FROM A CONTRACT

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- 9 Section where you can add the sales tax (VAT) associated to the invoice.
- 10 Options available for invoice management
 - a **Delete:** delete the invoice, you will have to do the whole management again.
 - b **Save as draft:** You will be able to save the invoice and continue editing it at a later time.
 - c **Calculate:** The invoice is updated and a final version can be viewed.
 - d **Send:** The invoice is sent to Glencore.
- 11 Click on send. The invoice has been sent to Glencore.

9 **Totals & Taxes**

Lines Net Total	1,000.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Total Tax	0.00
Net Total	1,000.00
Total	1,000.00

10

11

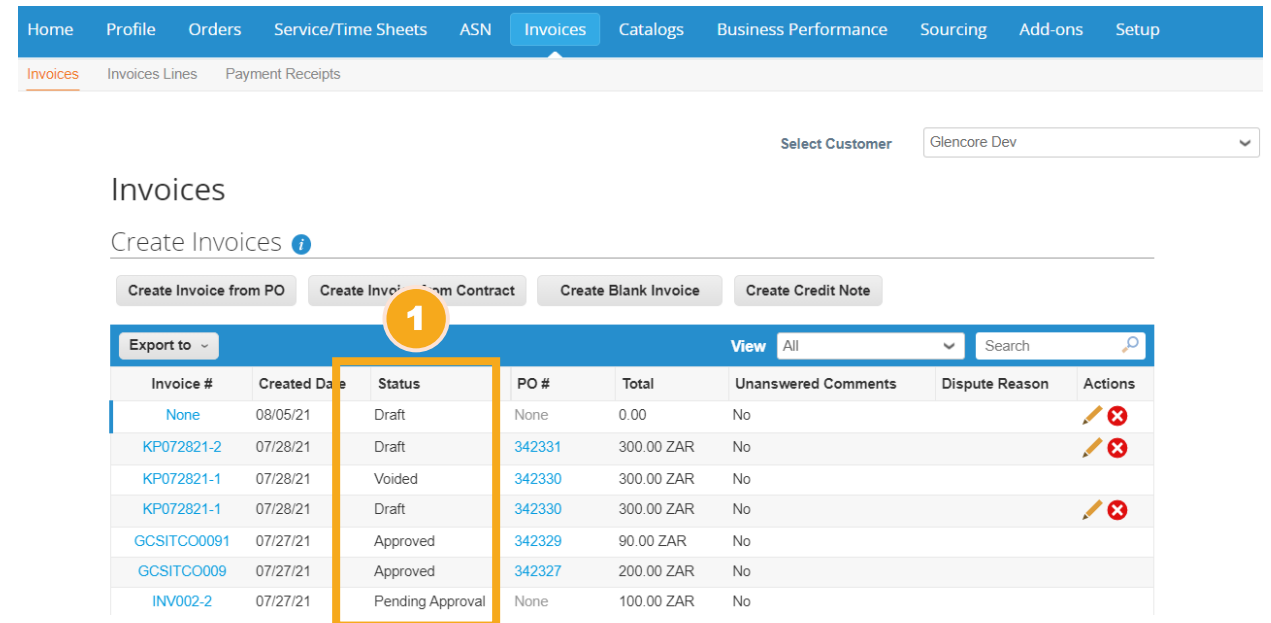
Delete Cancel Save as Draft Calculate **Submit**

5.5 CREATE AN INVOICE FROM A CONTRACT







In this section you will see the invoice statuses

1 In the invoices tab, you will find the invoice status. You will be able to track the status of the invoice. Which statuses can be displayed:

- a **Approved:** The invoice has been approved
- b **Pending approval:** The invoice is pending approval by Glencore.
- c **Draft:** Refers to an invoice that is being managed but has not yet been sent.
- d **Rejected:** The invoice has been rejected.
- e **In conflict:** The invoice has incorrect information and needs to be modified.




The screenshot shows the 'Invoices' page in the Coupa Supplier Portal. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there are sub-tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. A 'Select Customer' dropdown menu is set to 'Glencore Dev'. The main heading is 'Invoices' with a 'Create Invoices' link. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is displayed with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The 'Status' column is highlighted with a yellow box, and a yellow circle with the number '1' is placed over the 'Create Invoice from Contract' button.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	08/05/21	Draft	None	0.00	No		 
KP072821-2	07/28/21	Draft	342331	300.00 ZAR	No		 
KP072821-1	07/28/21	Voided	342330	300.00 ZAR	No		
KP072821-1	07/28/21	Draft	342330	300.00 ZAR	No		 
GCSITCO0091	07/27/21	Approved	342329	90.00 ZAR	No		
GCSITCO009	07/27/21	Approved	342327	200.00 ZAR	No		
INV002-2	07/27/21	Pending Approval	None	100.00 ZAR	No		

5.6 CREATE AN INVOICE FROM A CONTRACT

In this section you will learn how to add more lines or items to the invoice you are making

1 When you are in the invoice, in the lines section you will find the option to add lines. You can identify it with the icon 

2 A new line will be added to the invoice, complete the information to continue.



NOTE: You have the option to select the type of line, you can must leave the default value as Qty. They must have their respective proof of approval.

☰ Lines Line Level Taxation

1	Type	Description	Qty	UOM	Price	
	Qty ▾	Test Item	1.000	Pièce / Each / ▾	1,000.00	1,000.00 ✖
PO Line		Supplier Part Number				
None		<input type="text"/>				

1  Add Line  Pick lines from Contract

Totals & Taxes

 Agregar línea

Totales e impuestos

2

2	Type	Description	Qty	UOM	Price	
	Qty ▾	<input type="text"/>	1.000	Pièce / Each / ▾	0.00	0.00 ✖
PO Line		Supplier Part Number				
None		<input type="text"/>				

Additional support

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- ✓ Coupa Guides
- ✓ Glossary

SUPPLIER PORTAL GUIDES

Dedicated to suppliers on success portal and available directly on CSP

Coupa Success Portal Information

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

Purchase Orders

<https://www.coupa.com/success/purchase-orders>

Invoices

<https://www.coupa.com/success/suppliers-invoices>

Glossary



- **CSP:** Coupa Supplier Portal means suppliers will be able to make inquiries and upload information related to their invoices. The CSP also allows monitoring the invoice payment status, including payment problems. In addition, all related notifications will be sent to the registered email account.
- **Change request:** Make change requests on a purchase order, it can be for example price or quantity.
- **Credit note:** Document through which you can cancel invoices previously made.
- **Invoice:** Through Coupa you will have the possibility to generate an invoice against a purchase order (PO) and be able to follow it up
- **Sourcing Event:** RFX Events consist of Request for Information, Request for Quotation, and Request for Proposal defined by one buyer and many sellers.

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Glossary

RFX: RFI, RFQ or RFP

- **RFI:** Request for Information. Type of sourcing event used to collect qualitative information about suppliers or initiatives.
- **RFQ:** Request for quotation. Type of sourcing event that is used to obtain specific prices for products or services
- **RFP:** Proposal request. Type of sourcing event used when the product or service you obtain is complex in nature and requires a qualitative and quantitative assessment of the suppliers.
- **Lots:** Group of Items/Services That Need to Be Purchased Together from the Same Provider.
- **Items:** Lists of items to be procured. These can be set-up to be purchased together or from multiple suppliers if needed.
- **GC/GA/GZ - _____:** Taxonomy that users must follow for the names of sourcing events (GC _Glencore Coal /GA Glencore Alloys/ GZ Glencore Zinc)
- **Questionnaire:** Form that the supplier must complete with the options indicated (checkbox, text, attachments, or radio buttons) for further evaluation in the event evaluation process.

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QUESTIONS?

We are here to support you every step of the way.

**Project “Fusion”
Key Contact**

ZincFusionSupplier@glencore.ca

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