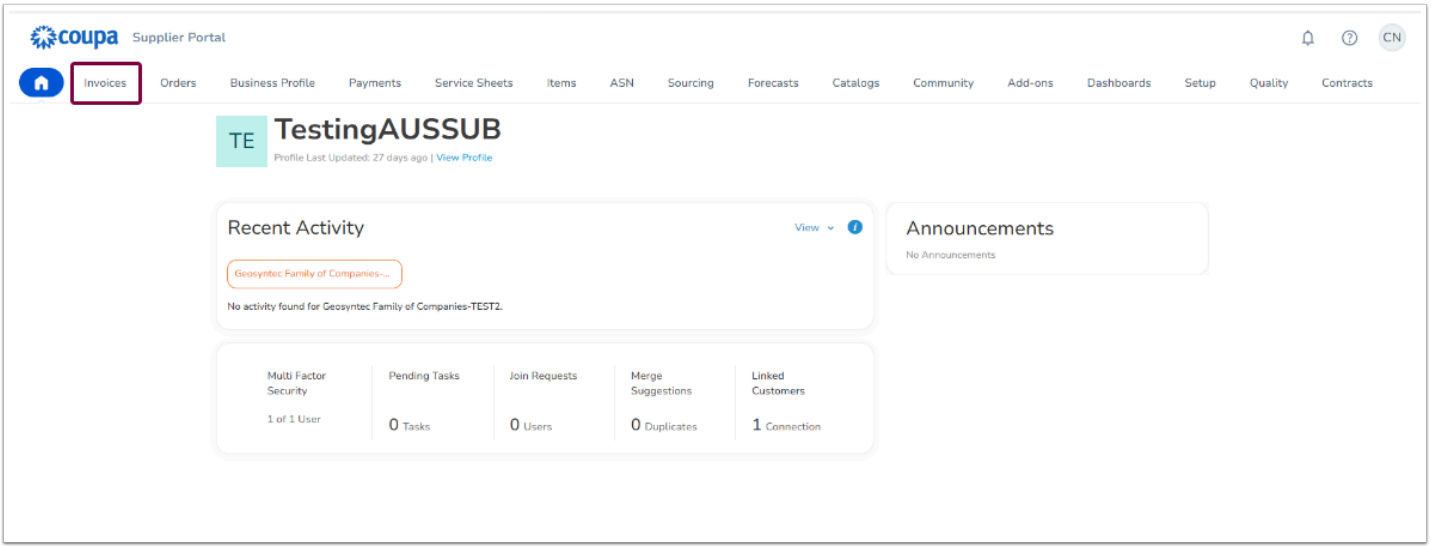
Creating an Invoice from a Contract (Work Order) in Coupa

Navigate to https://supplier.coupahost.com/sessions/new

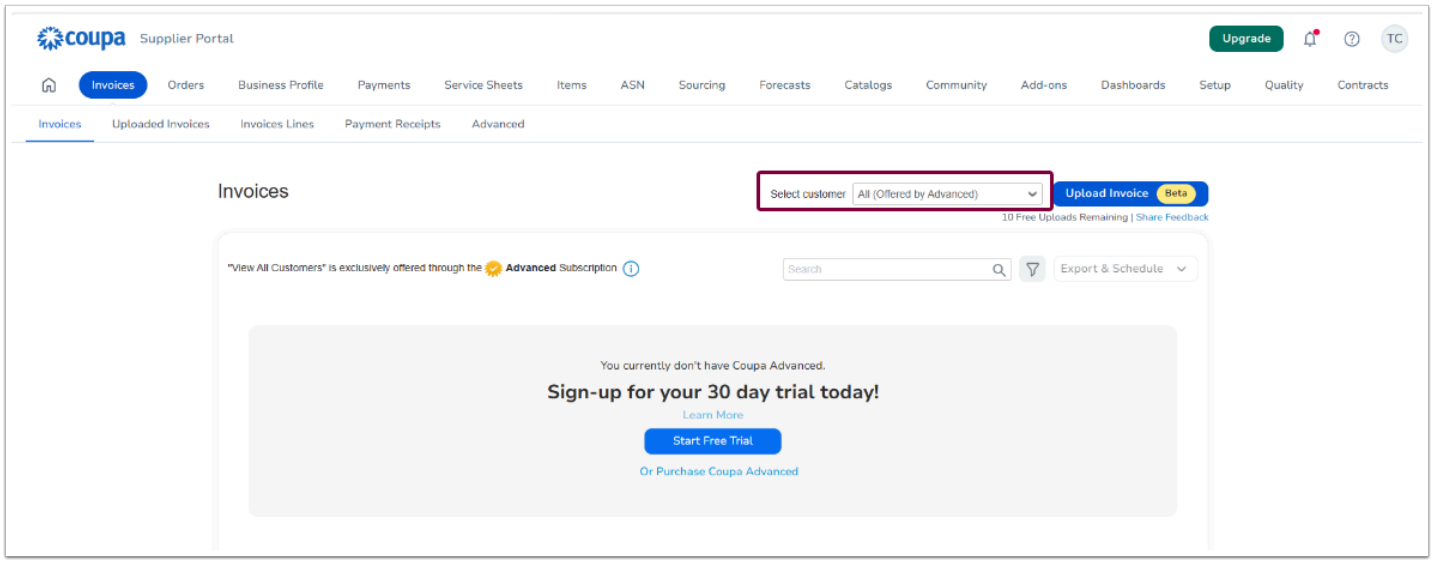
1. Select the "Invoices" tab at the top of the page



2. Select Geosyntec from the "Select Customer" dropdown

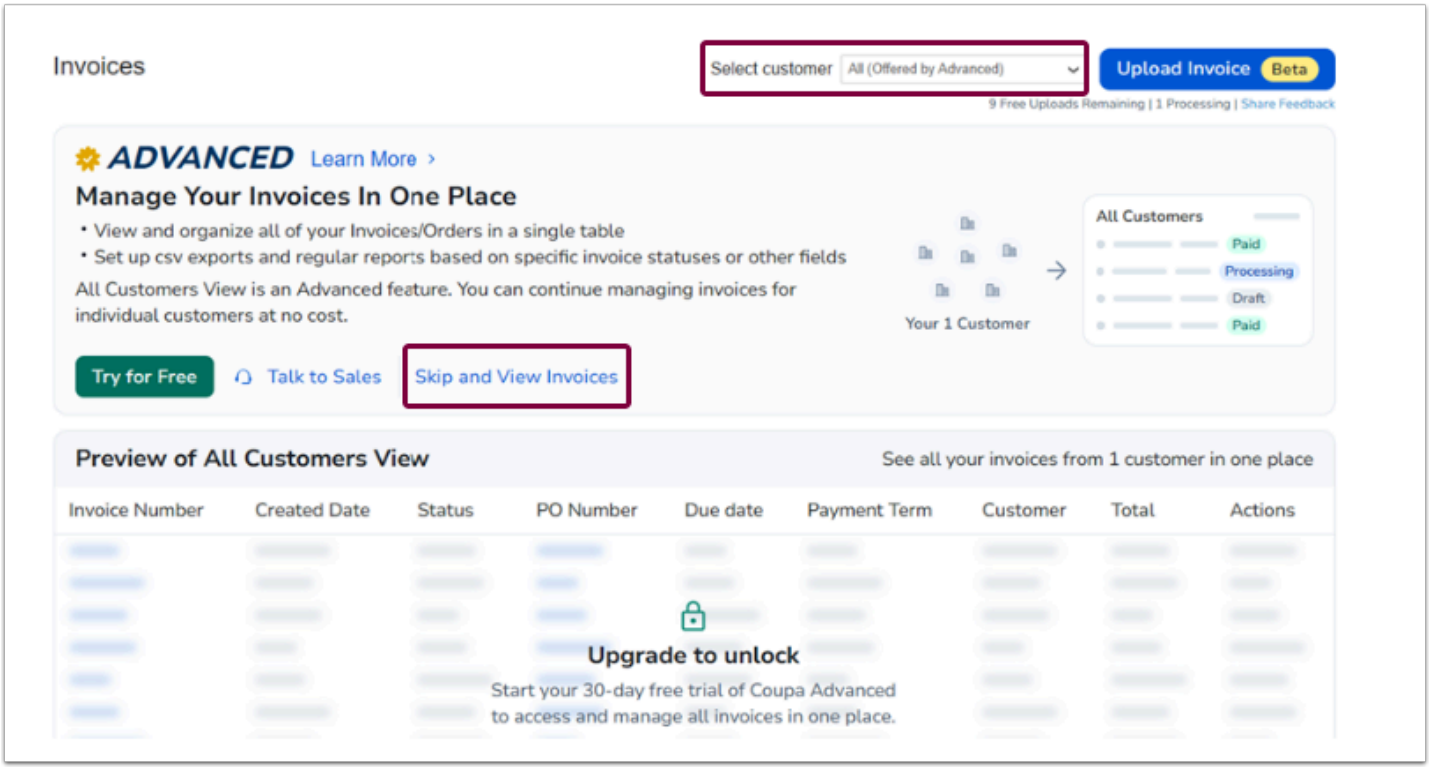
Note: Do not select Upload Invoice (Beta).

It may look like this:

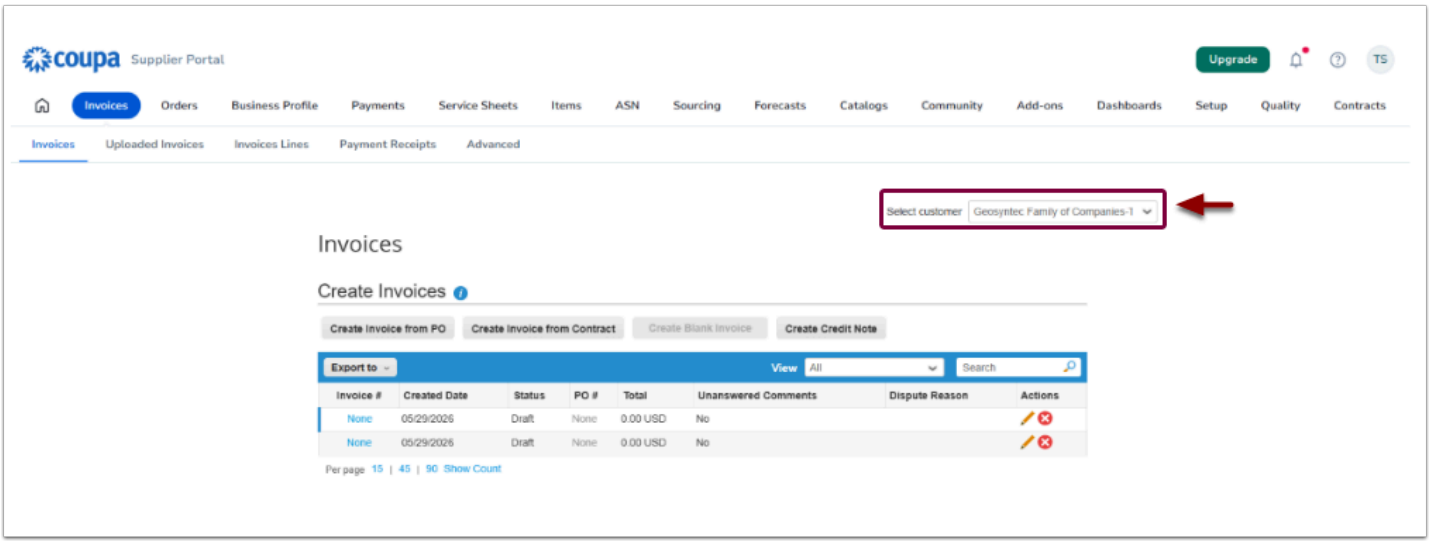


Or this:

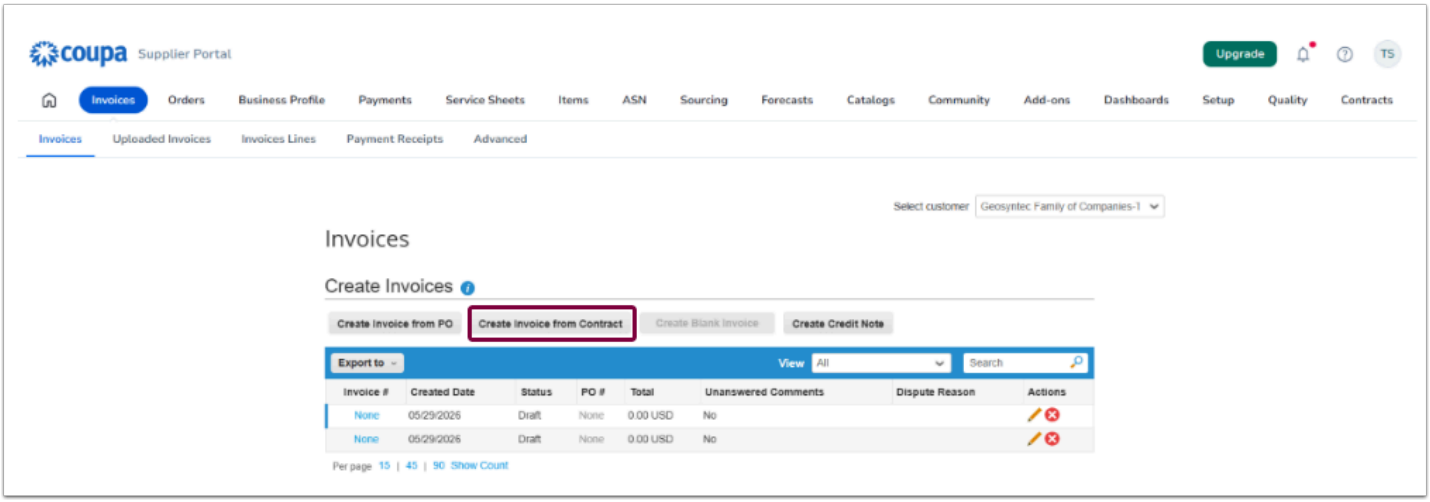
Either way select the customer and "skip and view invoices" to get out of the advanced Coupa subscription page.



Once Geosyntec is selected the subscription pop up will disappear and the Create Invoices options will appear.

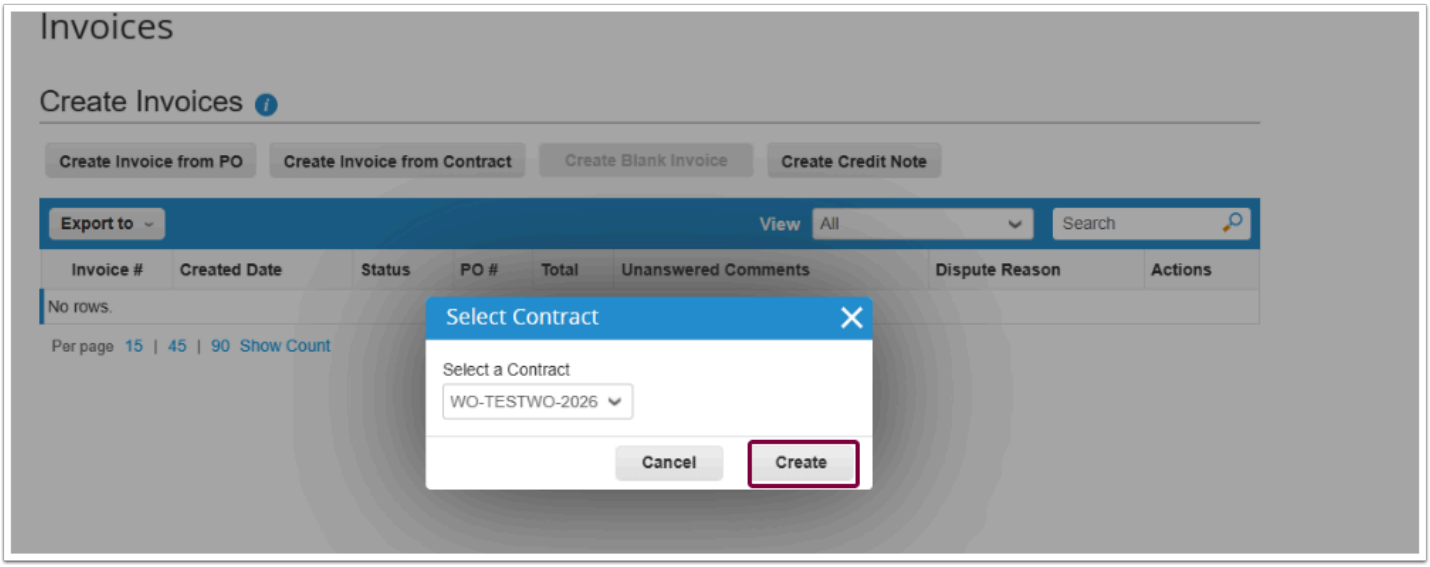


3. Select "Create Invoice from Contract"



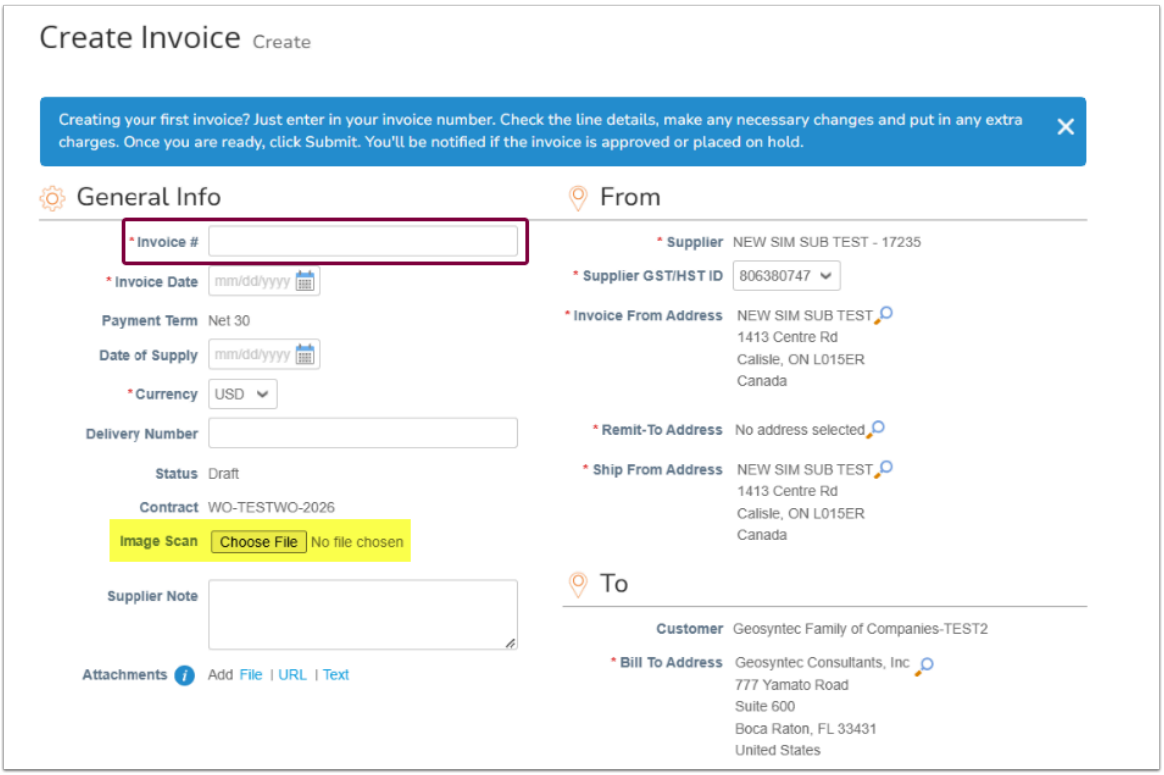
Note: If you do not see the Create Invoice from Contract button, see the Manage Users instructions linked here. (NEED TO ADD LINK)

4. Use the drop-down arrow to select the correct contract and select "Create"



5. Fill out all the required fields

Select the "*Invoice #" field and enter the invoice number and fill out all the required fields.



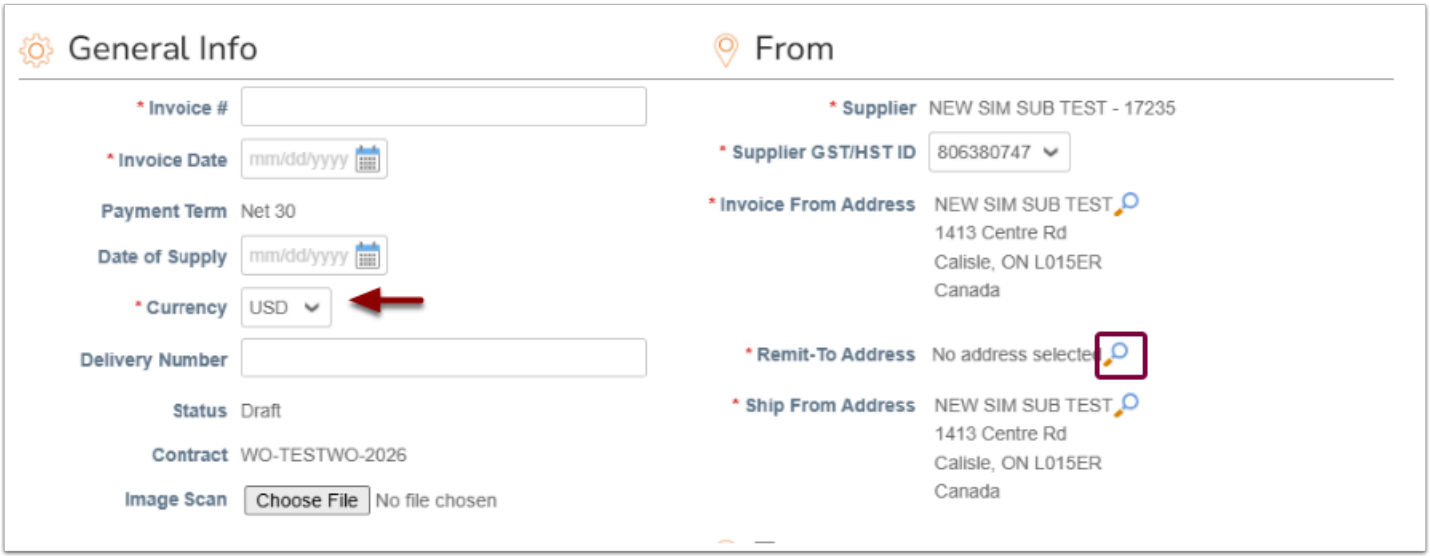
Note: Attachments can be uploaded in the highlighted area. File size limits apply, so files may need to be reduced in size before uploading.

When scanning documents, please use **black text** whenever possible, as the system may have difficulty reading other colors, such as red.

6. Select the magnifying glass next to the Remit-To Address

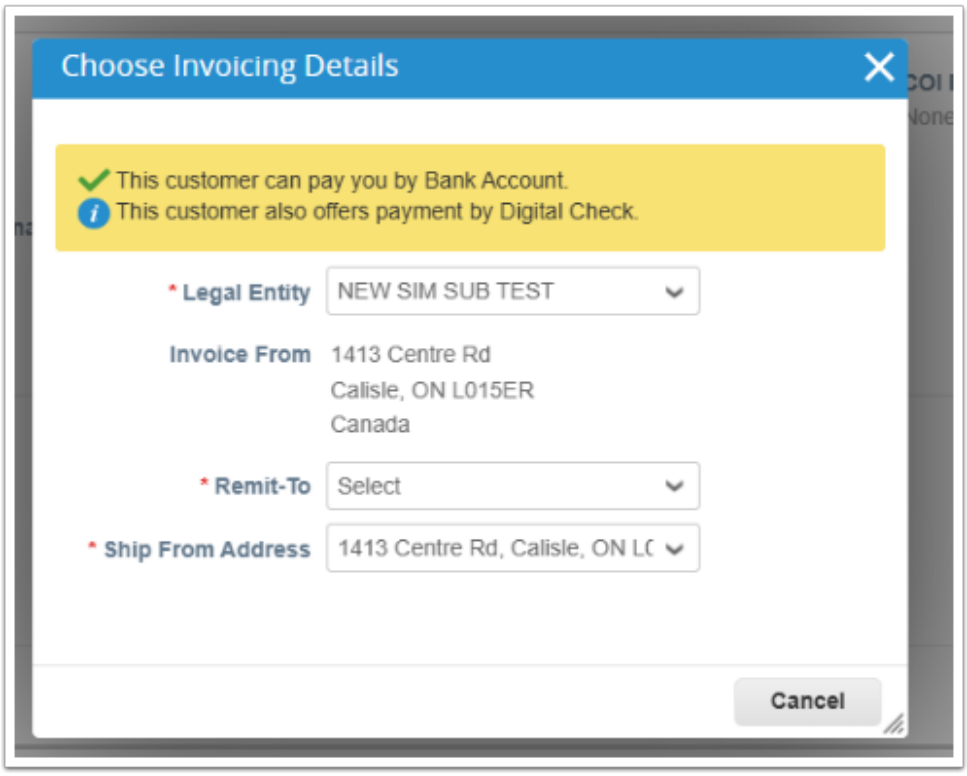
Note: If there are multiple legal entities or remit to addresses shown, select the one that matches the remit to information on the physical invoice.

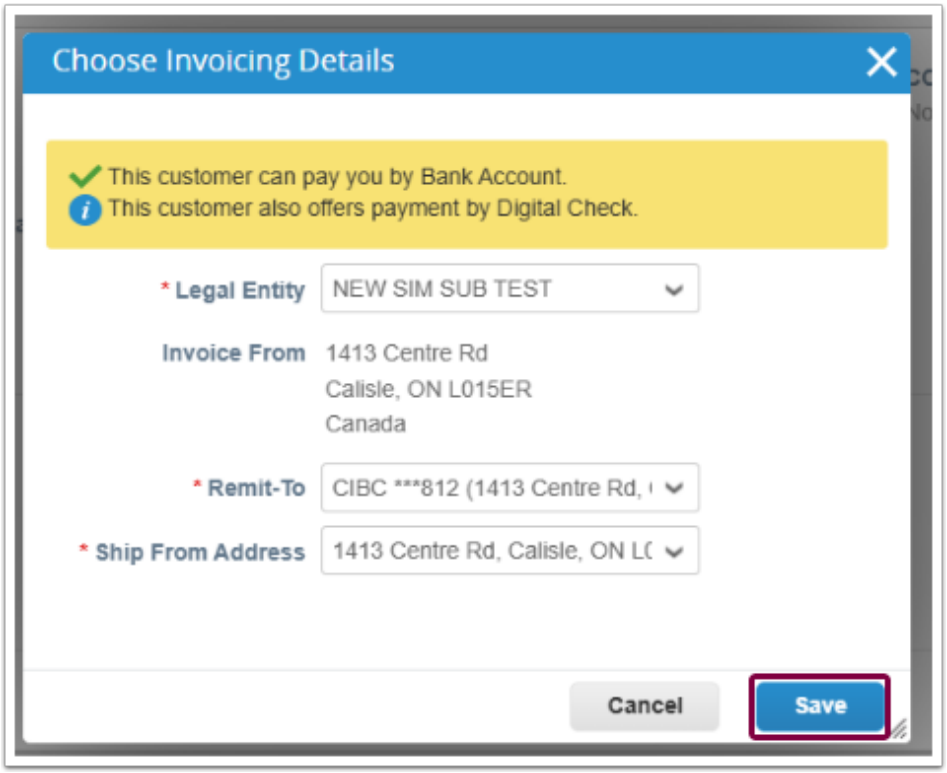
Note: Ensure that the currency matches the physical invoice.



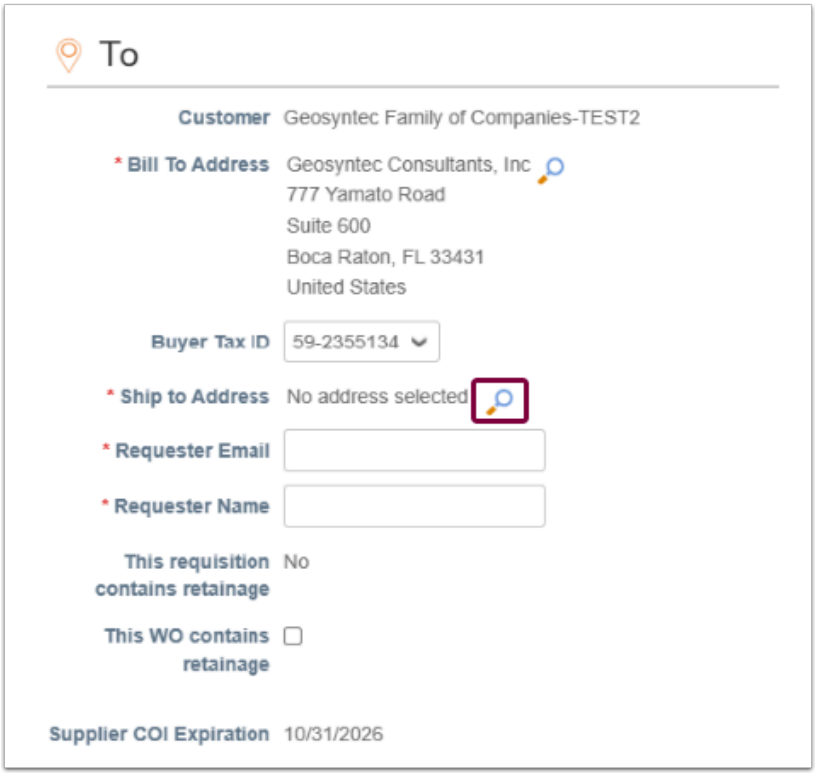
7. Choose Invoicing Details and select Save.

- Legal Entity
- Remit-To
- Ship From Address

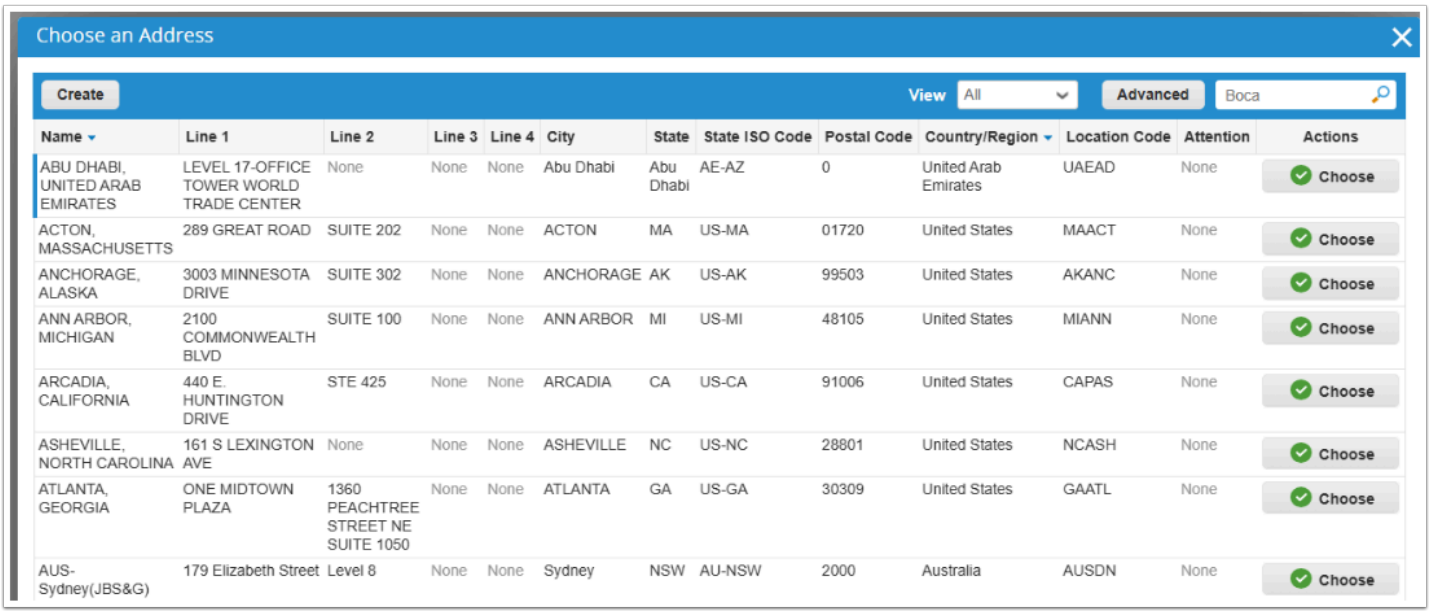

Choose Invoicing Details
This customer can pay you by Bank Account.
This customer also offers payment by Digital Check.
* Legal Entity
NEW SIM SUB TEST
Invoice From
1413 Centre Rd
Calisle, ON L015ER
Canada
* Remit-To
Select
* Ship From Address
1413 Centre Rd, Calisle, ON LC
Cancel

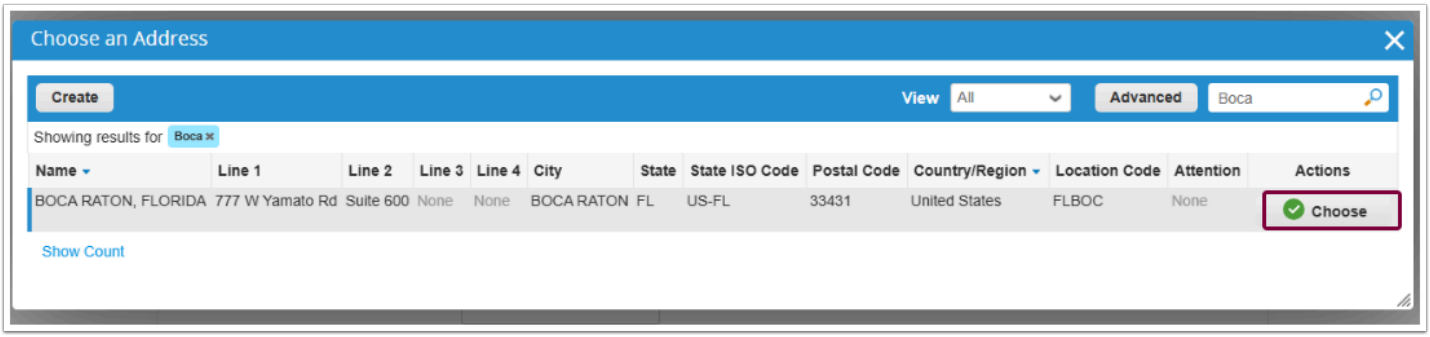

Choose Invoicing Details
This customer can pay you by Bank Account.
This customer also offers payment by Digital Check.
* Legal Entity
NEW SIM SUB TEST
Invoice From
1413 Centre Rd
Calisle, ON L015ER
Canada
* Remit-To
CIBC ***812 (1413 Centre Rd,
* Ship From Address
1413 Centre Rd, Calisle, ON LC
Cancel
Save

8. Select the magnifying glass icon next to the “Ship To Address” field.

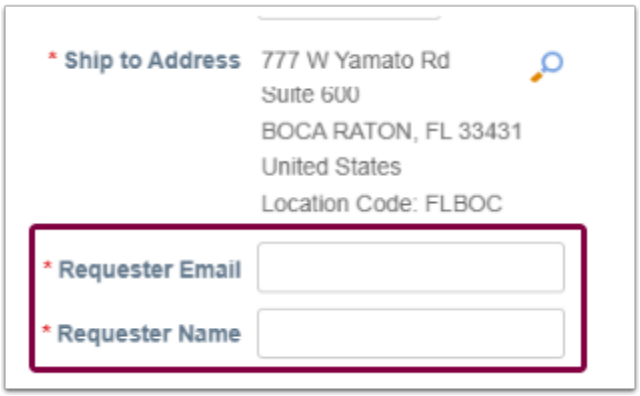


9. Use the type-ahead field to search for and select the appropriate Geosyntec location. Select Choose.

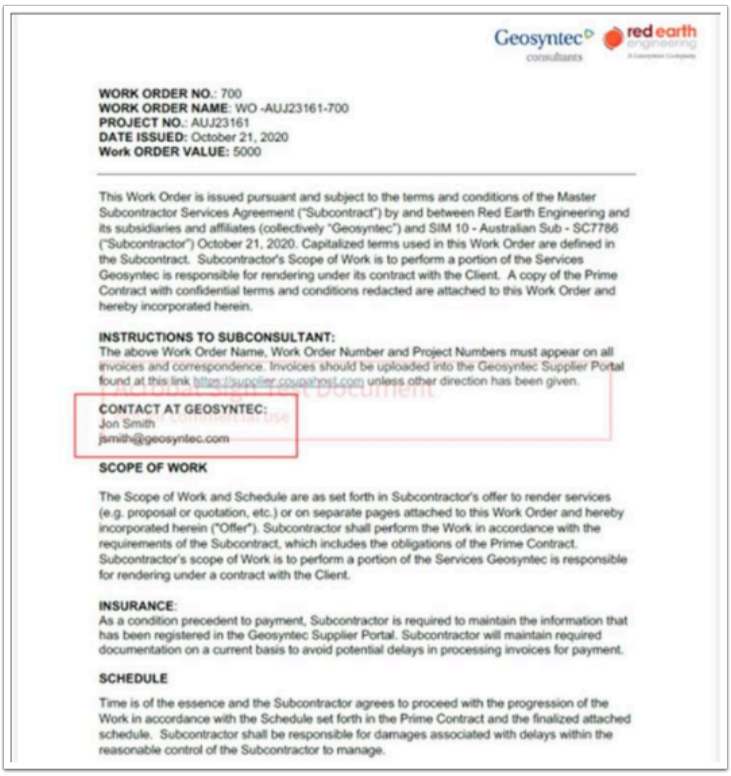




10. Fill out the "Requester Email" and "Requester Name" fields



You can find the Requester's information on the Work Order under the "Contact at Geosyntec" section. Use this information to complete the required fields. The information entered must match the Work Order; otherwise, you will receive an error and will not be able to submit the invoice.



Geosyntec consultants | red earth engineering

WORK ORDER NO.: 700
WORK ORDER NAME: WO -AUJ23161-700
PROJECT NO.: AUJ23161
DATE ISSUED: October 21, 2020
Work ORDER VALUE: 5000

This Work Order is issued pursuant and subject to the terms and conditions of the Master Subcontractor Services Agreement ("Subcontract") by and between Red Earth Engineering and its subsidiaries and affiliates (collectively "Geosyntec") and SIM 10 - Australian Sub - SC7786 ("Subcontractor") October 21, 2020. Capitalized terms used in this Work Order are defined in the Subcontract. Subcontractor's Scope of Work is to perform a portion of the Services Geosyntec is responsible for rendering under its contract with the Client. A copy of the Prime Contract with confidential terms and conditions redacted are attached to this Work Order and hereby incorporated herein.

INSTRUCTIONS TO SUBCONSULTANT:
The above Work Order Name, Work Order Number and Project Numbers must appear on all invoices and correspondence. Invoices should be uploaded into the Geosyntec Supplier Portal found at this link https://supplier.coupahost.com unless other direction has been given.

CONTACT AT GEOSYNTEC:
Jon Smith
jsmith@geosyntec.com

SCOPE OF WORK

The Scope of Work and Schedule are as set forth in Subcontractor's offer to render services (e.g. proposal or quotation, etc.) or on separate pages attached to this Work Order and hereby incorporated herein ("Offer"). Subcontractor shall perform the Work in accordance with the requirements of the Subcontract, which includes the obligations of the Prime Contract. Subcontractor's scope of Work is to perform a portion of the Services Geosyntec is responsible for rendering under a contract with the Client.

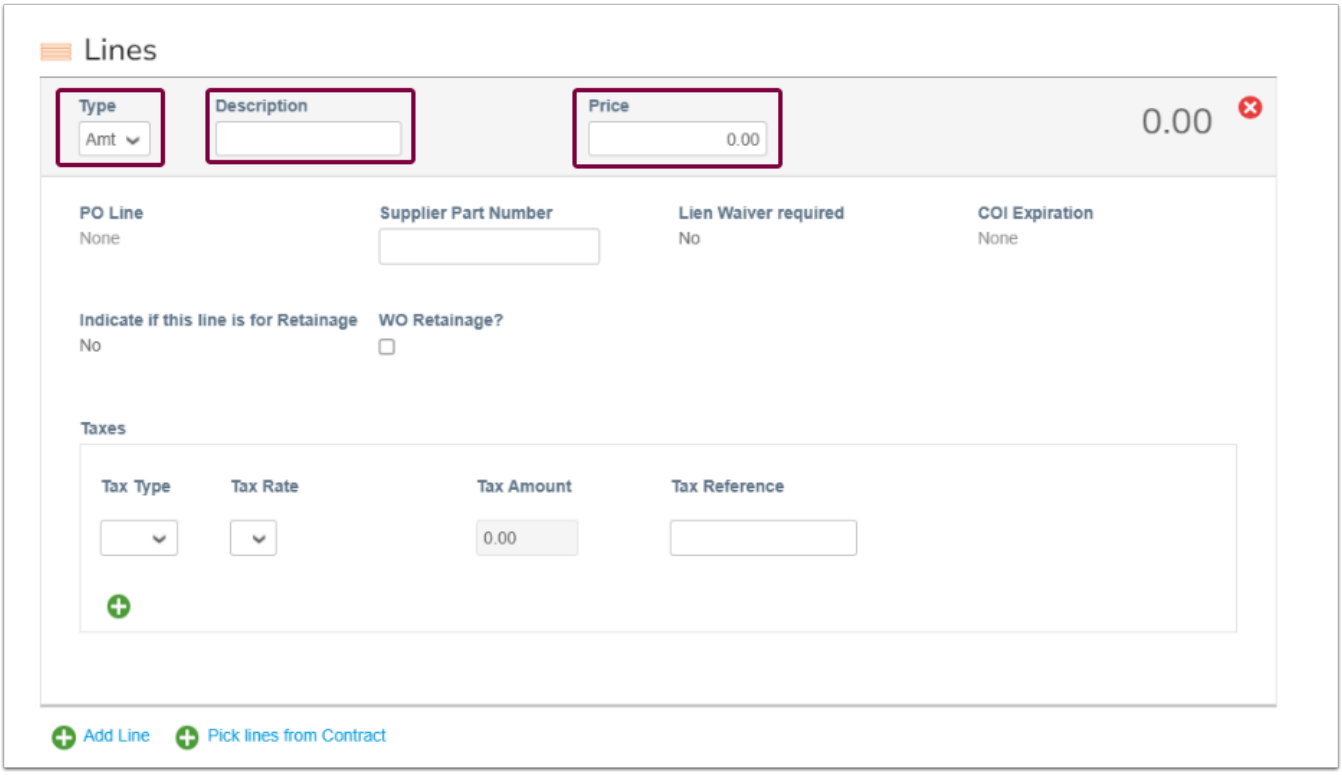
INSURANCE:
As a condition precedent to payment, Subcontractor is required to maintain the information that has been registered in the Geosyntec Supplier Portal. Subcontractor will maintain required documentation on a current basis to avoid potential delays in processing invoices for payment.

SCHEDULE

Time is of the essence and the Subcontractor agrees to proceed with the progression of the Work in accordance with the Schedule set forth in the Prime Contract and the finalized attached schedule. Subcontractor shall be responsible for damages associated with delays within the reasonable control of the Subcontractor to manage.

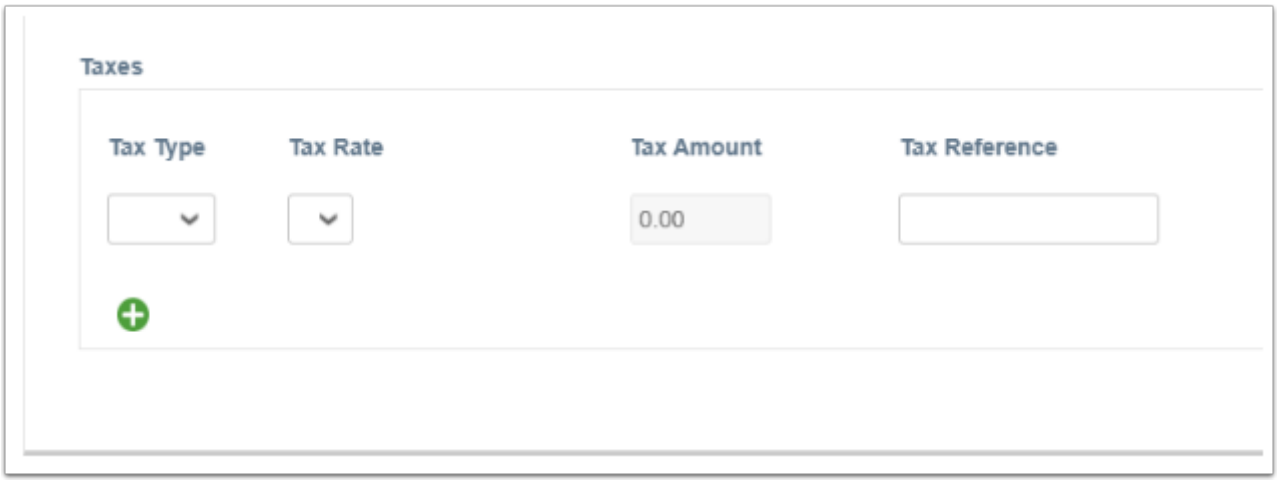
11. On the line, select Amt for the "type" and enter the "Description" and the "Price" fields.

Note: "Subcontractor Services" can be used as the description.

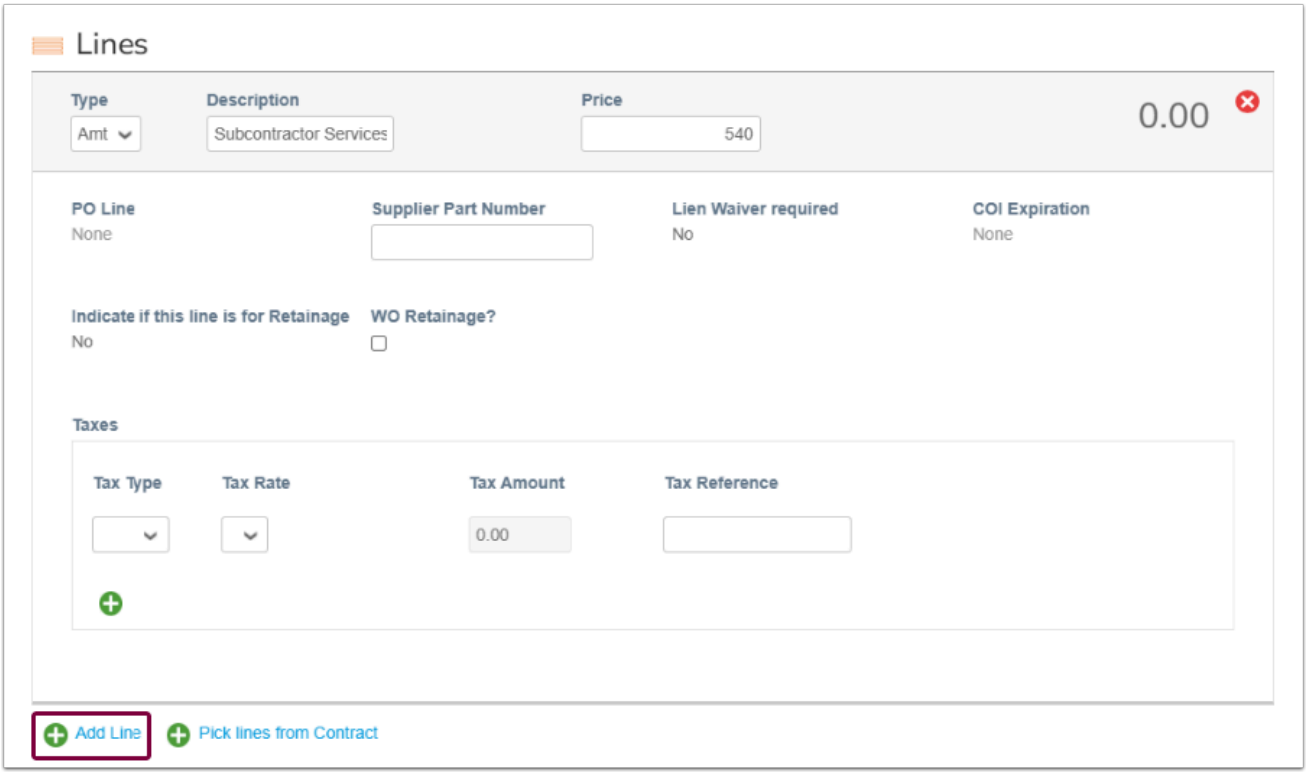


NOTE for International Suppliers:

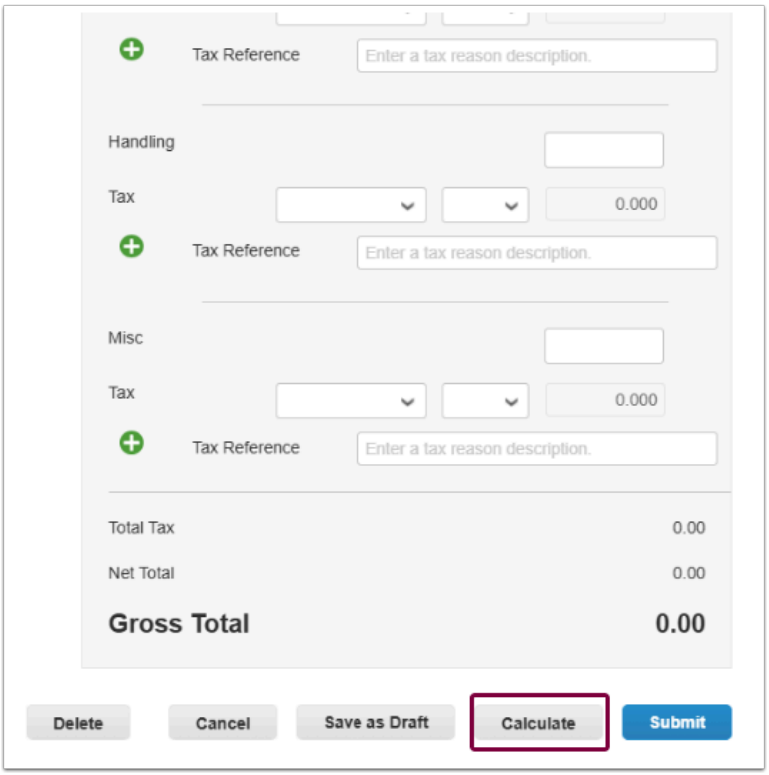
Select the tax information here:



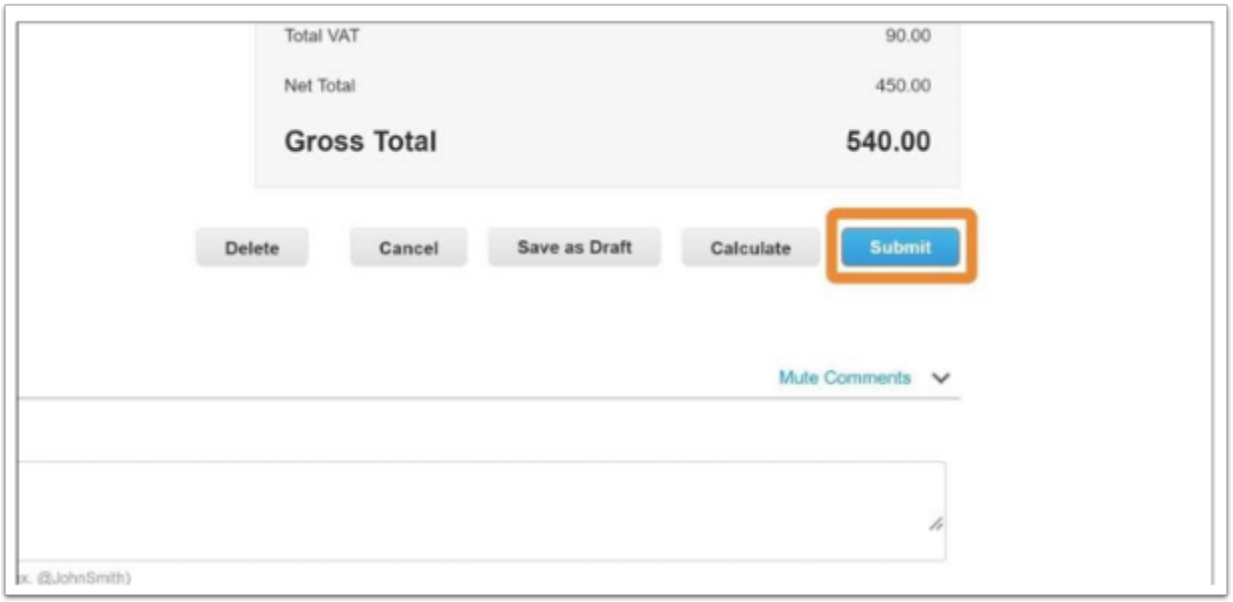
12. Optional: You can add as many invoice lines as needed and complete the same steps as above.

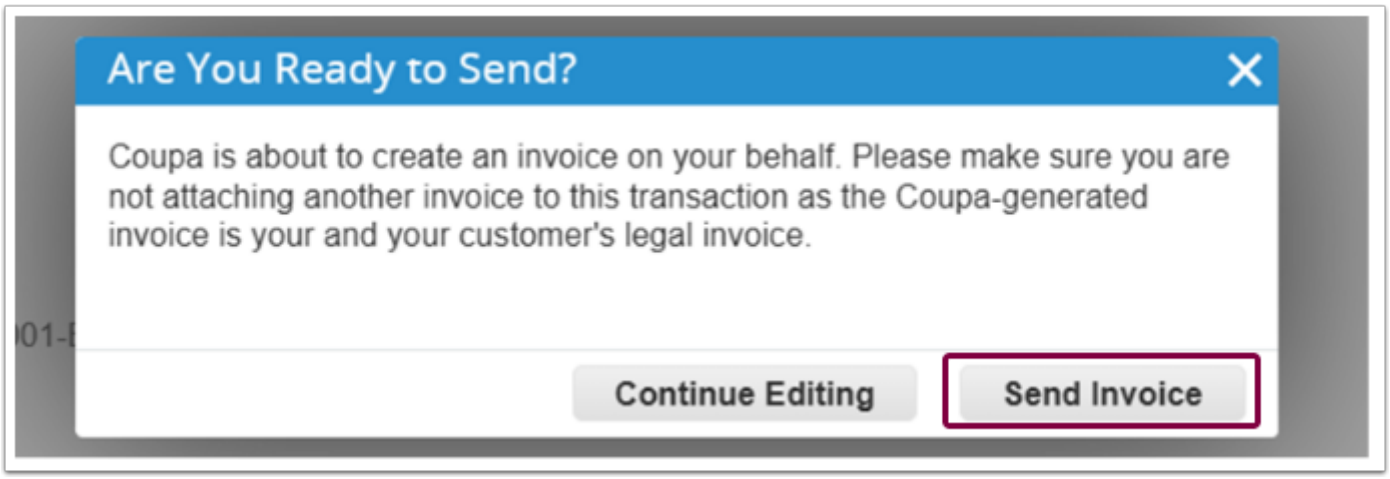
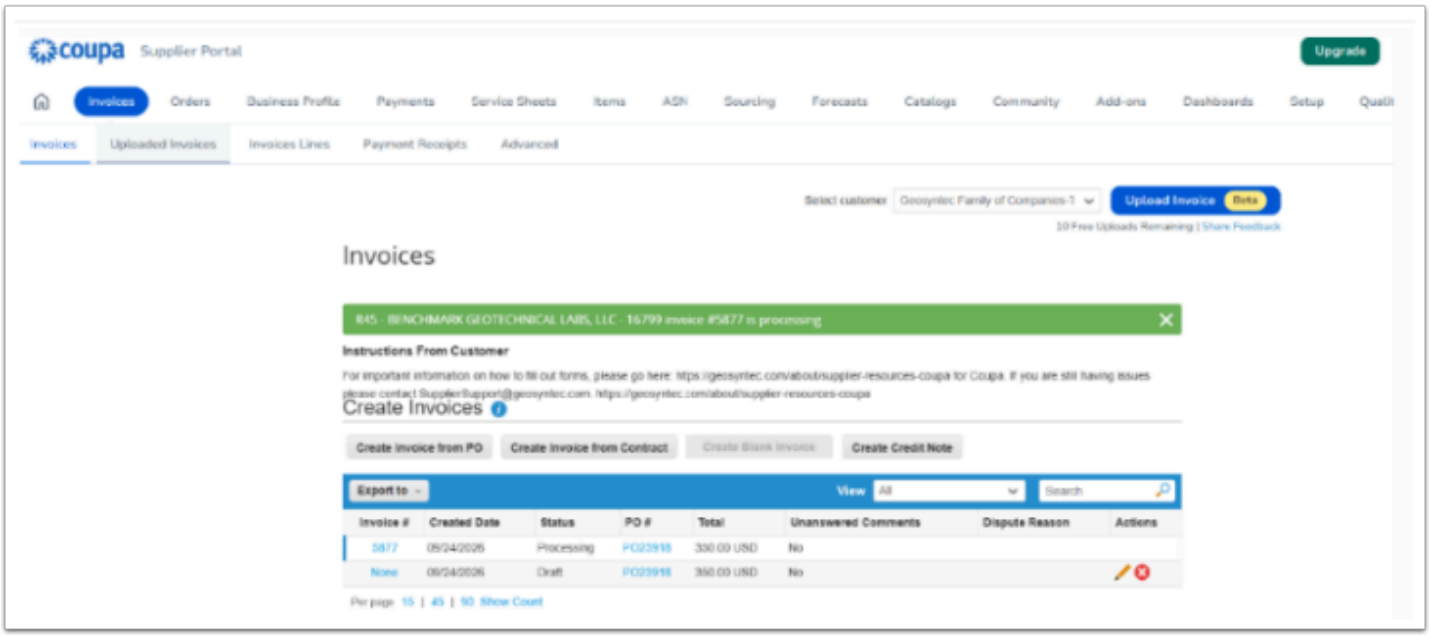


13. When finished, select the “Calculate” button at the bottom of the page. This will calculate the invoice total and allow you to verify that the amount is correct before submitting.



13.1. Click "Submit" and "Send Invoice"





14. Once the invoice has been submitted successfully, a green confirmation banner will appear at the top of the page. The invoice status should display as either “Processing” or “Pending Approval.”