



Supplier Portal

-

Raising and Submitting an
invoice



Step One
Select the Orders tab on the landing page

Click here for
'Orders' tab



Configure PO Delivery

Purchase Orders

Instructions From Customer

For More information and Quick Tutorial videos please go to <http://www.firstport.co.uk/about-us/contractors-and-suppliers/purchase-to-pay>






Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
1012680	02/02/2021	Issued	None	PM-WO-DRYRUNXW901 E2E - Service Description fir... PM-WO-DRYRUNXW901 E2E - Service	No	160.00 GBP		 

Step Two

Click on the gold coins to get started

from a Purchase Order

							View	All	Search	
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions		
1012593	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - Service Description Nam...	No	160.00 GBP				
1012592	13/01/2021	Issued	None	PM-WO-DRYRUNXW686 E2E - Service Description fir... PM-WO-DRYRUNXW686 E2E - Service Description Nam...	No					
1012542	19/11/2020	Issued	None	Test WO	No	100.00 GBP				
1012539	18/11/2020	Issued	None	internal door broken - has been kicked open - h...	No	60.00 GBP				
1012532	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some has be...	No	500.00 GBP				
1012531	18/11/2020	Issued	12/01/2021	Toilet leaking	No	450.00 GBP				

Click on the gold coins in line with the correct PO number to start the process

Step Three

Complete Remit to Address information

Select Customer

FirstPort

Configure PO Delivery

Create Invoice Create

General Info

* Invoice #

* Invoice Date 14/01/2021

Payment Term END1M

Date of Supply 14/01/2021

* Currency GBP

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

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

Cash Accounting

From

* Supplier Sadia Limited Estates

* Supplier VAT ID GB/NA

* Invoice-From Address Sadia Limited Estates
123 Test Road
London
NW10 0PJ
United Kingdom
Limited

* Remit-To Address No address selected

* Ship-From Address Sadia Limited Estates
123 Test Road
London
NW10 0PJ
United Kingdom

To

Complete 'Remit to Address' by clicking the magnifying glass

Step Four

Select the correct Remit To address

CIS Commodity
No

Billing
35738A-S1 35738A-1810-1384

Taxes

VAT Rate

*** Legal Entity** Sadia Limited Estates [+ Add New](#)

Invoice From 123 Test Road
London
NW10 0PJ
United Kingdom

*** Remit-To** Select [+ Add New](#)

*** Ship-From Address** 123 Test Road, London, NW10 [+ Add New](#)

Click the dropdown
arrow to find the
correct address

Cancel

Step Five

Input Invoice number

Configure PO Delivery

Create Invoice Create

General Info

From

* Invoice # ✓

* Invoice Date

Payment Term

Date of Supply

* Currency ▾

Delivery Number

Status

Image Scan No file chosen

Supplier Note

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

Cash Accounting

Input 'Invoice Number' here

* Supplier

* Supplier VAT ID ▾

* Invoice-From Address
123 Test Road
London
NW10 0PJ
United Kingdom
Limited

* Remit-To Address
123 Test Road
London
NW10 0PJ
United Kingdom

* Ship-From Address
123 Test Road
London
NW10 0PJ

Step Six

Input cost for each item

PO Line 1012680-1			Contract ▼	Supplier part number <input type="text"/>	Labour Amount <input type="text"/> <small>You must complete the Labour amount</small>	80.00
CIS Commodity No						
Billing 35738A-S1 35738A-1810-1384						
Taxes						
VAT Rate 20.0% ▼	VAT Amount 16.00	Tax Reference <input type="text"/>				
Add Tag						
Type 	Description PM-WO-DRYRUNXV	Price <input type="text"/>				80.00

Input item cost here

Step Seven

Select the VAT Rate for each item

0.00 ✖

0.00

Supplier part number

Labour Amount

You must complete the Labour amount

CIS Commodity
No

Billing
35738A-S1 35738A-1810-1384

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	<input type="text"/>	
5.0%		
0.0%		
Exempt		
0% Reverse Charge		

+ Add Line

0.00
0

Total VAT 0.00


Choose your 'VAT Rate' from the dropdown box

Step Eight

Select Calculate & Submit

Lines Net Total	160.00
Lines VAT Totals	32.00
<hr/>	
Total VAT	32.00
Net Total	160.00
Gross Total	192.00

[Delete](#) [Cancel](#) [Save as draft](#) [Calculate](#) [Submit](#)

 Comments

Enter Comment

[Add Comment](#)

Click 'Calculate' to finalise the Invoice amount then 'Submit'

Step Nine

Send Invoice

PO Line
1012593-1

Contract



Supplier part number

Labour Amount

You must complete the Labour amount

CIS Commodity
No

Billing
35738A-S1 35738A-1810

Taxes

VAT Rate

VAT Amount

0.00

Tax Reference

Add Tag

Type



Description

PM-WO-DRYRUNXW6E

Price

80.00

80.00



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

Click here to
'Send Invoice'

Step Ten

Confirm Invoice matches PO & Submit

180.00 180.00

PO Line 1012593-1 Contract Supplier part number Labour Amount

CIS Commodity No

Billing 35738A-S1 35738

Taxes

VAT Rate	VAT Amount	Tax Reference
0.0%	0.00	

Add Tag

Type Description Price 180.00

Warning from FirstPort

This Invoice has the following warning:

- Before submitting an invoice, please ensure your invoice matches the PO. If not, please request a change to your PO first.

Continue Editing Submit

Click here to confirm the price match and 'Submit'

Step Eleven

Check your Invoice has been sent for approval

Orders Catalogues Business Performance Sourcing

Orders Order lines Returns Order Changes Order Line Changes Deliveries

This green bar will appear to confirm the Invoice has been submitted for approval

FirstPort

Configure PO Delivery

Invoices

Sadia Limited Estates invoice #MD12345 is processing

Create Invoices i

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to ▾

View All ▾

Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
MD12345	26/02/2021	Processing	1012680	192.00 GBP	No		

Step Twelve

Check to find your new Invoice

Select Customer

FirstPort

Configure PO Delivery

Create Invoices i

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
MD12345	26/02/2021	Pending Approval	1012680	192.00 GBP	No		
CN0005	24/02/2021	Pending Approval	1012623	-160.00 GBP	No		
CN 2000	23/02/2021	Pending Approval	1012601	-20.00 GBP	No		
CN 1000		Pending Approval	1012622	-160.00 GBP	No		
MD Test CN		Pending Approval	1012623	-180.00 GBP	No		
150221 Backed Under NO		Backed	1012676	192.00 GBP	No		
150221 Backed under YES	15/02/2021	Approved	1012678	192.00 GBP	No		
150221 Backed Under NO	15/02/2021	Approved	1012677	160.00 GBP	No		
CN001	13/02/2021	Pending Approval	1012622	-160.00 GBP	No		

New Invoice will be shown at the top of your list