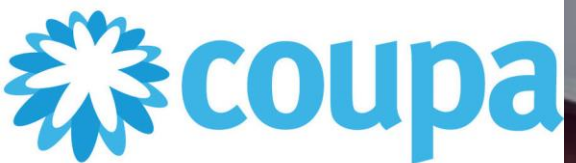




Supplier Portal

-
Raising and Submitting an
invoice



Step One

Start the Invoicing process

ACCOUNT | NOTIFICATIONS 59 | HELP

Home | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogues | Business Performance | Sourcing

Add-ons | Setup

Orders | Order lines | Returns | Order Changes | Order Line Changes | Deliveries

Select Customer

Filter...


Configure PO Delivery


On the landing page click the “Orders” tab

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

View <div>All</div> <div>Search</div>						
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 No Description fir... PM-WO-DRYRUNXW901 E2E - Service		160.00 GBP 

Click the  Action to Invoice from a Purchase Order

Step Two

Finding the correct PO number

					View		All	Search	
					Unanswered Comments	Total	Assigned To	Actions	
7 E2E -					No	160.00		 	
Service Description fir... PM-WO-DRYRUNXW687 E2E -						GBP			
On the "Orders" page find the Order No you want to raise an invoice against									
1012592	13/01/2021	Issued	None	INXW686 E2E - ion fir...	No	195.00		 	
INXW686 E2E - ion Nam...						GBP			
1012542	19/11/2020	Issued	None	test wvO	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			
1012530	18/11/2020	Issued	None	another ke	No	600.00		 	
						GBP			
1012529	18/11/2020	Issued	None	notice boar by MED ...	No	300.00		 	
						GBP			
1012528	17/11/2020	Issued	None	lock for MED is broken - wont lock	No	60.00		 	
						GBP			
1012527	17/11/2020	Issued	None	Front door lock has broken	No	60.00		 	
						GBP			

Click on the gold coins
to start the process

Step Three

Fill in the “Remit to Address”

Select Customer

FirstPort 


Configure PO Delivery

Create Invoice

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 Scheme

Margin Scheme

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

Customer FirstPort

* Bill-To Address

Marlborough House
Wigmore Place
Luton, Bedfordshire
LU2 9EX

Fill in the “Remit to”
address by clicking
the magnifying glass

Step Four

Find the correct address

CIS Commodity
No

Billing
35738A-S1 35738A-1810-1384

Taxes

VAT Rate

 Add Tag

×

Legal Entity

United 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

Cancel

Click the dropdown
arrow to find the
correct address

Step Five

Inserting the Invoice number

Select Customer

FirstPort

Configure PO Delivery

Create Invoice Create

General Info

* Invoice #

MD002

✓

* Invoice Date

14/01/2021

📅

Payment Term

END1M

Date of Supply

14/01/2021

📅

* Currency

GBP

▼

Delivery Number

Status

Draft

Image Scan

Choose file

No file chosen

Supplier Note

Attachments

📘

Add

File

|

URL

|

Text

Cash Accounting Scheme

Margin Scheme

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

* Ship-From Address

123 Test Road

London

NW10 0PJ

United Kingdom

Insert the invoice number here

Step Six

Confirm the cost for each item

80.00

PO Line

1012680-1

Contract

Supplier part number

Labour Amount

You must complete the Labour amount

CIS Commodity

No

Billing

35738A-S1 35738A-1810-1384

Taxes

VAT Rate

20.0%

VAT Amount

16.00

Tax Reference

Add Tag

Type	Description	Price
	PM-WO-DRYRUNXV	80.00

Insert the item cost here

Step Seven

Select the VAT rating 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%		
5.0%		
0.0%		
Exempt		
0% Reverse Charge		

+ Add Line

Total Taxes

Lines Net Total

Lines VAT Totals

Total VAT

Choose your VAT rating from the dropdown box

Step Eight

Create Invoice attached to correct PO number

Click “Calculate” to
finalise the Invoice
amount

Lines Net Total	160.00
Lines VAT Totals	32.00
Total VAT	32.00
Net Total	160.00
Gross Total	192.00

Delete

Cancel

Save as draft

Calculate

Submit

0 Comments

Enter Comment

Click the “Submit”
button to send to
FirstPort

Add Comment

Step Nine

Confirm the Invoice conditions

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
the Invoice

Step Ten

Confirm the price match with the PO

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
send to FirstPort

Step Eleven

Check your Invoice has been sent for approval

ices Catalogues Business Performance Sourcing

Orders Order lines Returns Order Changes Order Line Changes Deliveries

Select Customer

FirstPort ▾

Configure PO Delivery

Invoices

Sadia Limited Estates invoice #MD12345 is processing

Create Invoices ⓘ

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		

The green bar will appear at the top of your "Invoices" page to confirm the Invoice has been submitted for approval

Step Twelve

Confirm the process is completed

Select Customer

FirstPort

Configure PO Delivery

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	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	23/02/2021	Pending Approval	1012622	-160.00 GBP	No		
MD Test CN1	23/02/2021	Pending Approval	1012623	-180.00 GBP	No		
150221 Backed Under MAYBE	15/02/2021	Approved	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		

Your new Invoice will be shown at the top of the list of invoices

Your new Invoice will be shown at the top of the list of invoices