Invoice via PO Email / PO Flip

Invoice via PO email is a simple way to submit invoices through Coupa / SupplyNet. This method allows you to flip the Purchase order you received via email into an invoice. Suppliers also get notifications after they submit an invoice, this improves transparency and further reduces the need for suppliers to track down the status of their invoices through phone calls or emails.

How to create an invoice from the Purchase Order email

Read instructions below and Watch Video Tutorial - optional (Less than 4 minutes):

You will receive an email containing your purchase order from: do_not_reply@ualberta.coupahost.com

Step 1:

Click on the 'Create Invoice' button at the bottom of the email. You can also forward the PO email to someone within your organization to create the invoice.

Step 2

 Enter the information indicated below.

    a) Enter the invoice number
    b) Enter Invoice date as indicated in your PDF attachment
    c) Attach your PDF invoice (Choose File - Image Scan)

       Add other supporting documents if applicable as additional file attachments.
       Note for foreign wire transfers outside Canada or the US, your wire transfer banking details must be included on the PDF invoice or a completed UofA wire transfer form

must be attached to each invoice.

d) Update Invoice lines (when invoice lines do not match your PO):
   ○ Edit qty or pricing for your invoice for partial invoicing
   ○ Click X to delete lines if applicable
   ○ Do not add lines, this is not supported
   ○ Add shipping and handling in Shipping Field
e) Click Calculate and confirm total and GST matches your PDF Invoice total.
f) Check the box if you wish to be notified regarding your invoice status
g) Click 'Submit'

⊕ Add Line D ⊕ Pick lines from Contract

Totals & Taxes

Shipping   D   [   ]

| GST | CA: GST - GST ⌄ | 5.000 | % | 100.000 |
⊕

Total GST   100.00
Net Total   2,000.00
Total   **2,100.00**

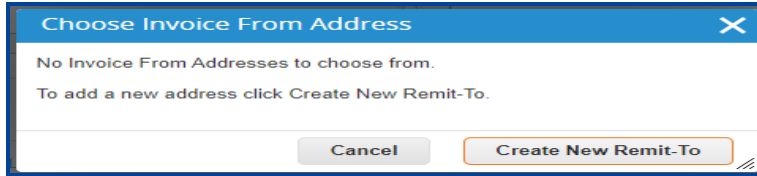F   Email me status updates for invoices I create this way ☑

E

| Delete | Cancel | Save as Draft | Calculate |

G

Submit

ONE-TIME SET-UP ONLY:

Read instructions below on Creating a Remit To Address and watch Video Tutorial - optional (Approx. 2 minutes):

The first time you create an Invoice from the PO email you need to create an address.

Enter the Required Fields:

Tax ID is a mandatory field enter your Tax ID # here.
If you do not have a Tax ID Number enter 999999999

Important Note:

Remit to Address or Banking Information entered here is not transmitted to the University of Alberta

For changes to a remit-to address, EFT or payment information, please click here to access the required form.