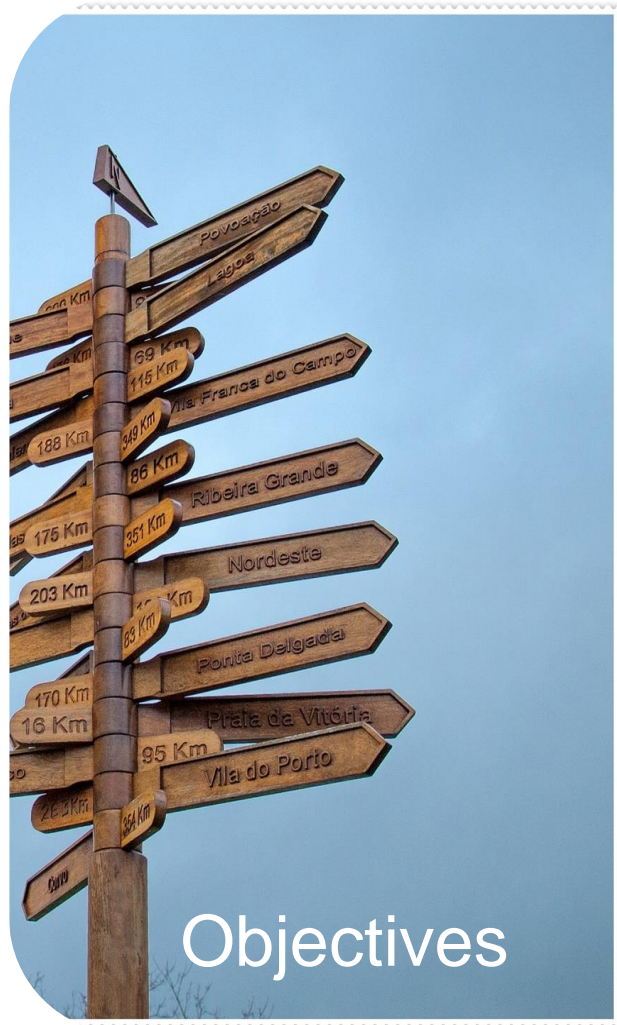


*Focusing on our core utility businesses*

# Coupa Supplier Portal Training Guide – Suppliers

CenterPoint Energy





## Learning Objectives

This training introduces Coupa navigation for Suppliers.

By the end of this session, you will be able to:

1. Log in and navigate the Coupa Supplier Portal
2. Receive POs
3. Request a PO change
4. Submit invoices
5. See payment status

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# Overview: Coupa Supplier Portal (CSP)

## Overview: Coupa Supplier Portal (CSP)

The Coupa Supplier Portal (CSP) is a free tool for you to easily do business with customers who use Coupa. Using the CSP, you can:

- Manage your company information
- Configure your company PO transmission preferences for each customer
- Create online catalogs for each customer
- View POs from all your connected customers who use Coupa
- Acknowledge purchase orders
- Flip and send invoices directly in Coupa
- Exchange real-time transactional notes with customer

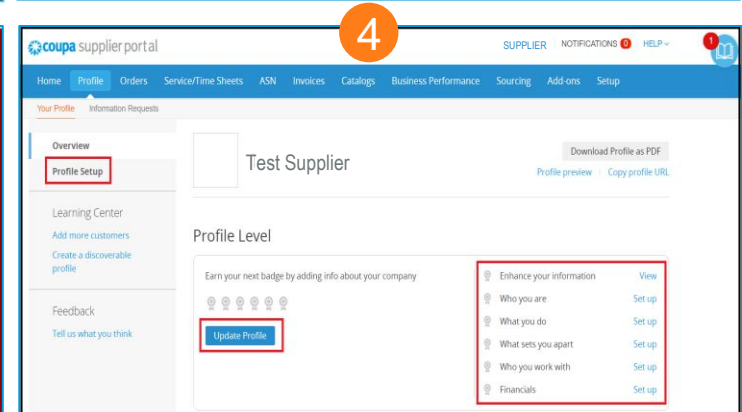
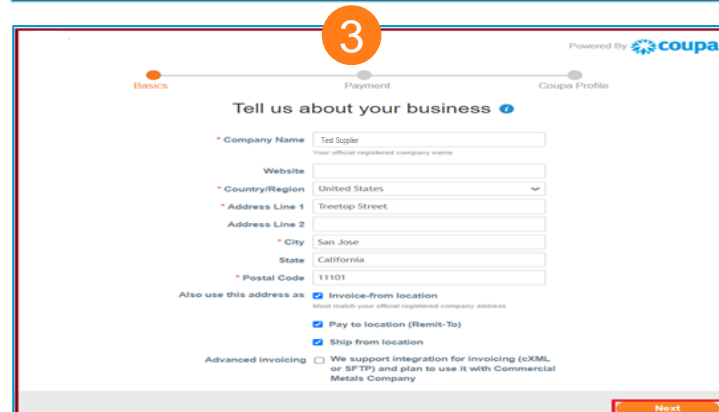
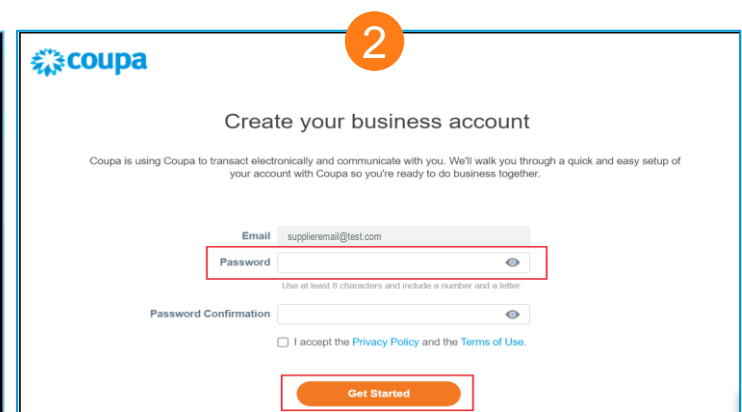
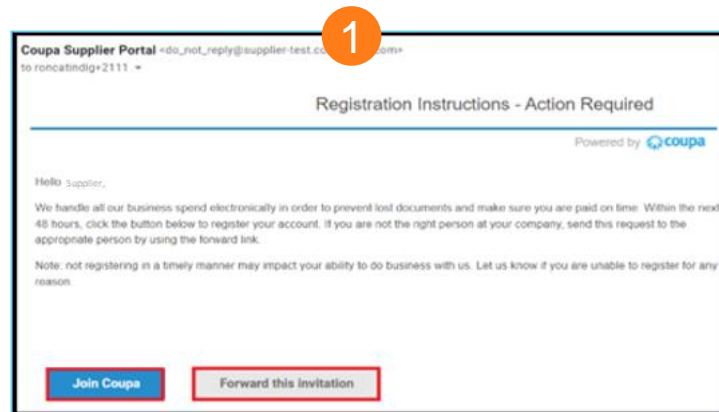


# Accepting an Invitation to the CSP

# Accepting an Invitation to the CSP

After you receive an invitation to join Coupa Supplier Portal

1. Click on **Join Coupa**.  
*Note: This email can also be forwarded to other members of the company.*
2. Set up your password.  
Click **Get Started**.
3. Fill out the relevant information for your company. Click **Next**.
4. Complete your profile.



*Note: you may be prompted to join Coupa Advantage for a fee. This is not required to complete your profile or to transact with CenterPoint Energy.*

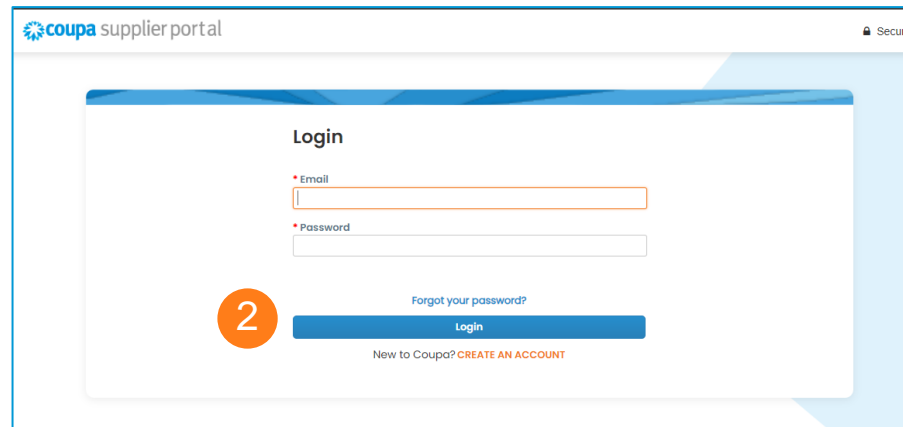
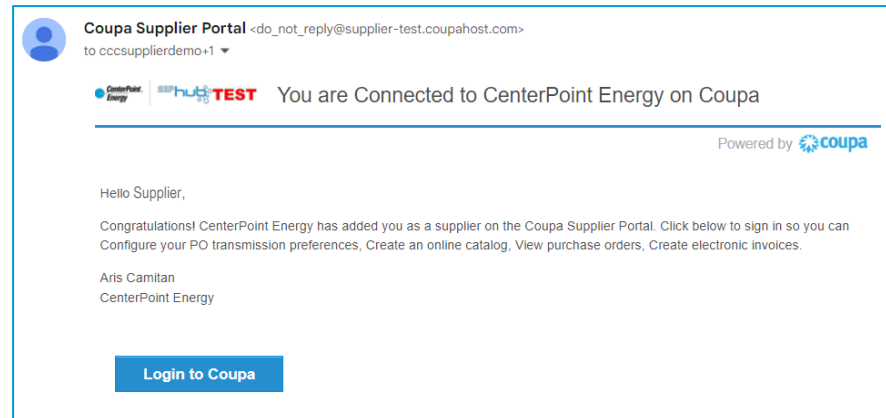
# Connecting an Existing CSP Account to CenterPoint Energy



# Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.

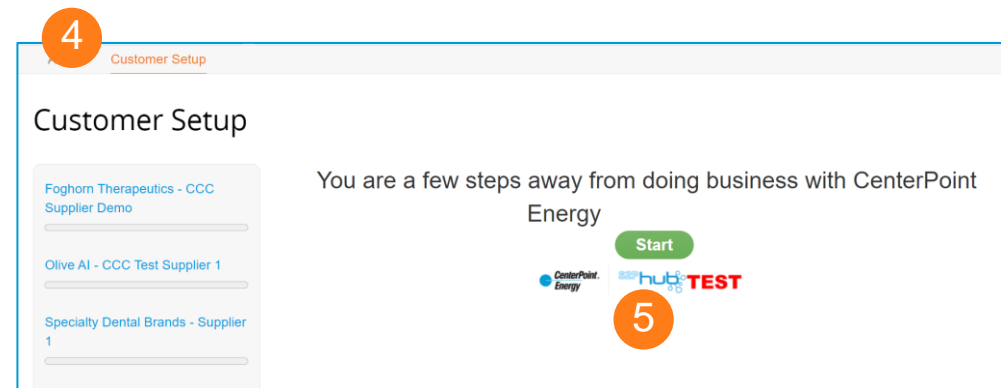
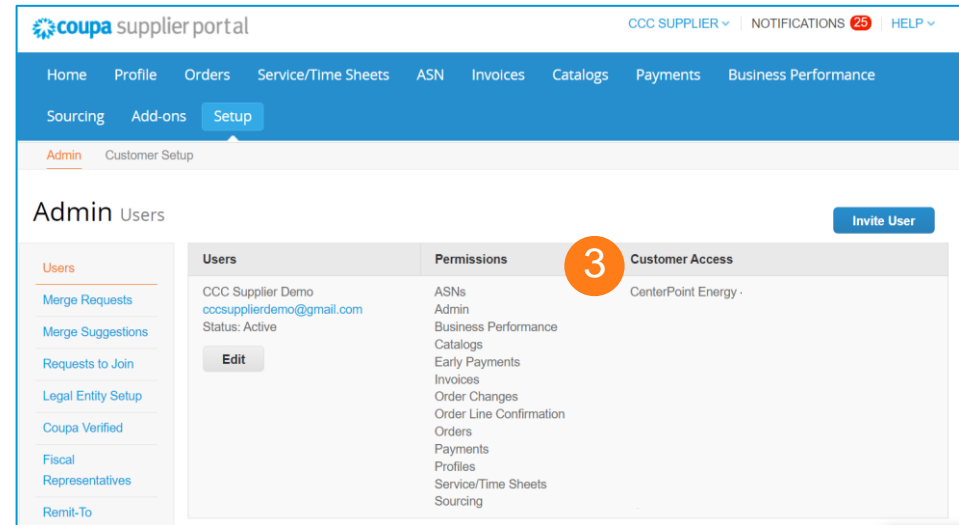
1. Upon receiving the notification from Coupa, click **Login to Coupa**.
2. Coupa Supplier Portal page will be displayed. Enter your credentials and click **Login**.



# Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.


3. Once login credentials are setup, CenterPoint Energy will be added in your customer access list automatically.
4. Click Customer Setup.
5. Choose CenterPoint Energy's profile and complete the steps to finish the setup. Click **Start**.





# Connecting CenterPoint Energy to Current CSP Account

6. Confirm the Invoice-from Location, Ship-to from, etc.. Once done, click **Next**.
7. Finish the setup until steps are completed and click **Finish**.

6



## Confirm Invoice-From Location

This is the main address of your registered business or the registered entity you will be invoicing your customer from.

Use my current legal entity

\* Country/Region

United States

\* Address

Line 1

\* City

City

State

CA

\* Postal Code

14023

**Advanced Invoicing**

Invoice-From Code

Recommended if you plan to use with CenterPoint Energy in integration for invoicing (cXML or SFTP).

\* Preferred Invoicing Language

English (US)

Tax Country/Region

United States

Tax ID ?

I don't have Tax ID Number

[+ Additional Tax ID](#)

Next

7

Finish

# Self-Service Management of Contractor Users/Access to Coupa Supplier Portal

# Management of Your Company's CSP User Access

As your organization changes, you have the ability to manage what users have access and what kind of access to the CSP. From the **Setup > Admin > Users** Tab the steps are below

1. Click the **Invite User** button to bring up the invitation form.
2. Populate the Name and Email of the co-worker.
3. Further review and adjust which Permissions they require.
4. Review the Customer who that user should support.
5. Once completed, an email will be sent to the user to accept and **Join Coupa Supplier Portal**



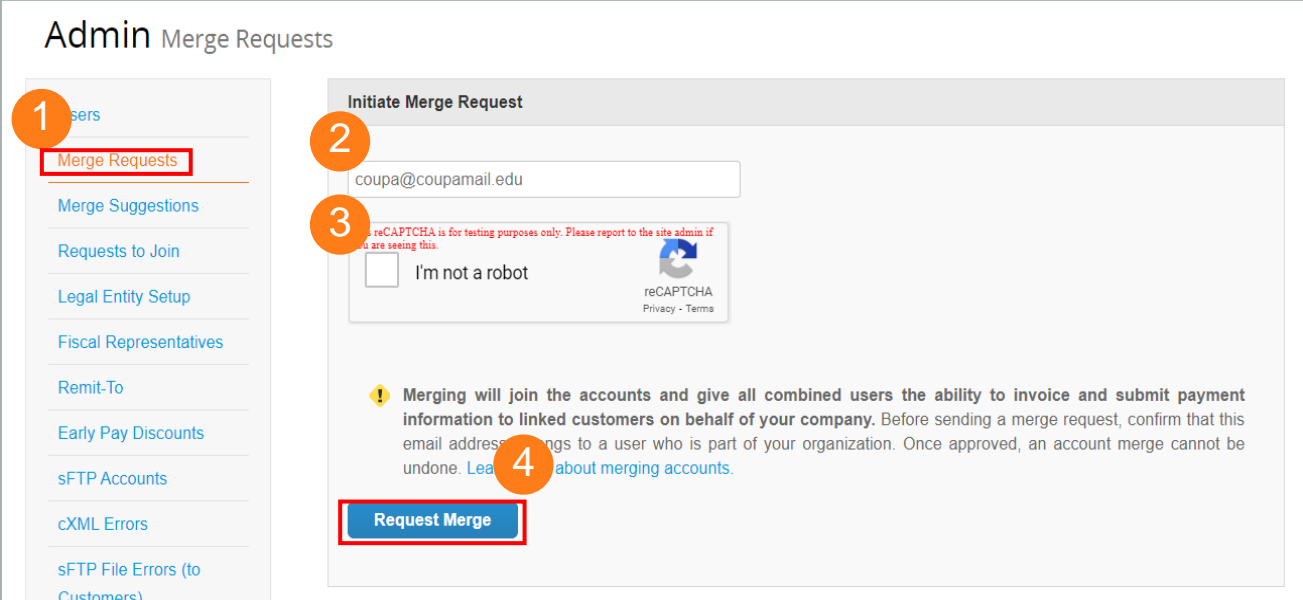
The image illustrates the process of inviting a user to the Coupa Supplier Portal through five numbered steps:

- 1:** In the 'Admin Users' section of the Coupa Supplier Portal, the 'Invite User' button is highlighted.
- 2:** The 'Invite User' form is shown with fields for 'First Name', 'Last Name', and 'Email'.
- 3:** The 'Permissions' section is shown with various roles and access levels selected.
- 4:** The 'Customers' section is shown with 'CenterPoint Energy' selected.
- 5:** An email notification is shown with the 'Join Coupa Supplier Portal' button highlighted.

## Combining/Linking Account

It is possible that your company has multiple entities in CenterPoint's systems, this may result in multiple invites to the CSP. You can merge accounts if desired to simplify and reduce logins. From the **Setup > Admin** Tab follow the steps are below:

1. Select **Merge Requests**
2. Enter the email address of the user who was invited to the CSP which you wish to merge.
3. Complete the CAPTCHA
4. Click the **Request Merge** button.



The screenshot shows the 'Admin Merge Requests' interface. On the left is a sidebar menu with 'Merge Requests' highlighted. The main content area is titled 'Initiate Merge Request' and contains a form with the following elements:

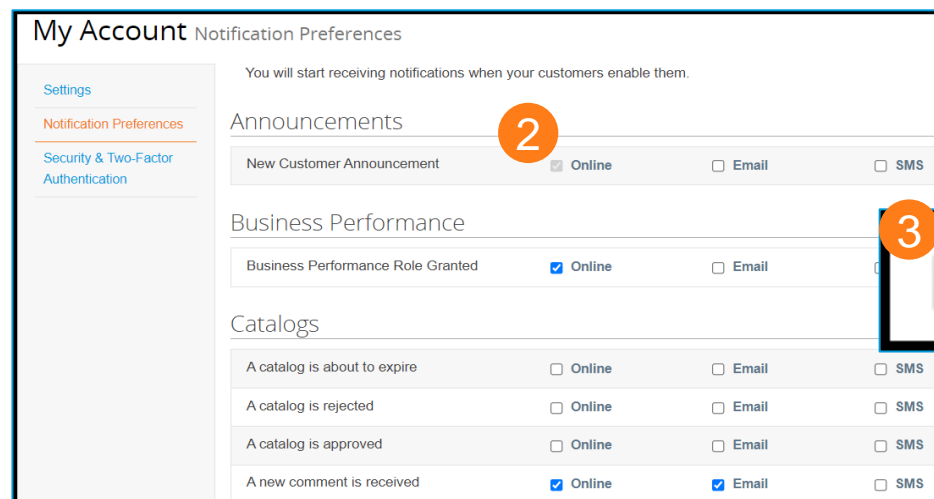
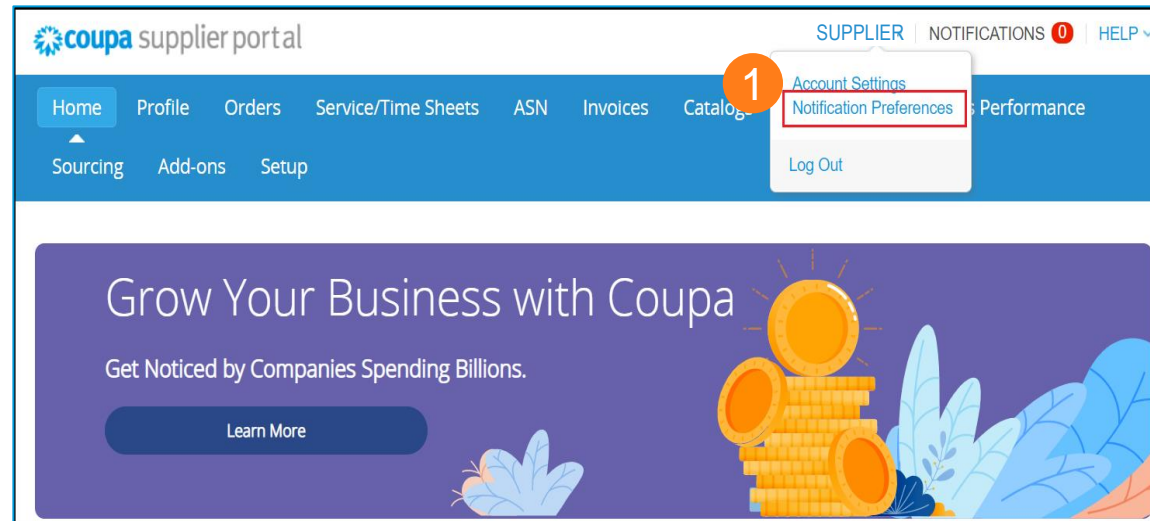
- 1**: A red box highlights the 'Merge Requests' menu item in the sidebar.
- 2**: A text input field containing the email address 'coupa@coupamail.edu'.
- 3**: A reCAPTCHA verification area with the text 'reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.' and an 'I'm not a robot' checkbox.
- 4**: A blue 'Request Merge' button at the bottom of the form.

Below the form, a warning message states: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)'

# Managing Notifications

# CSP - How to Manage Notifications

1. After logging in, hover your mouse over your name. Click Notification Preferences.
2. Click the type of notifications that you want to enable or disable.
3. Click Save.

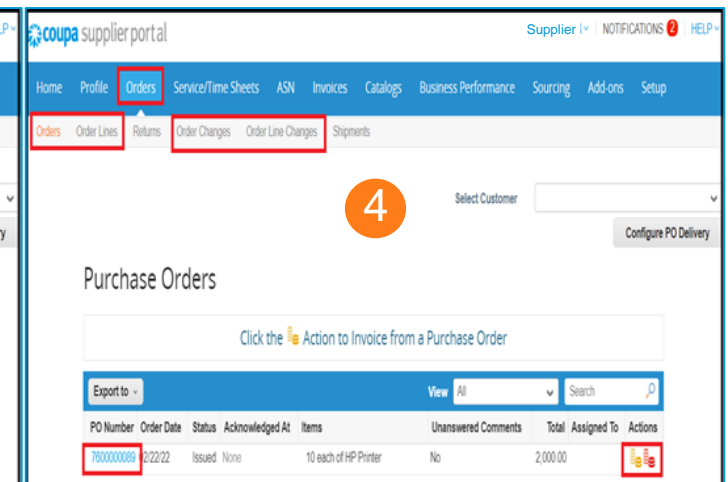
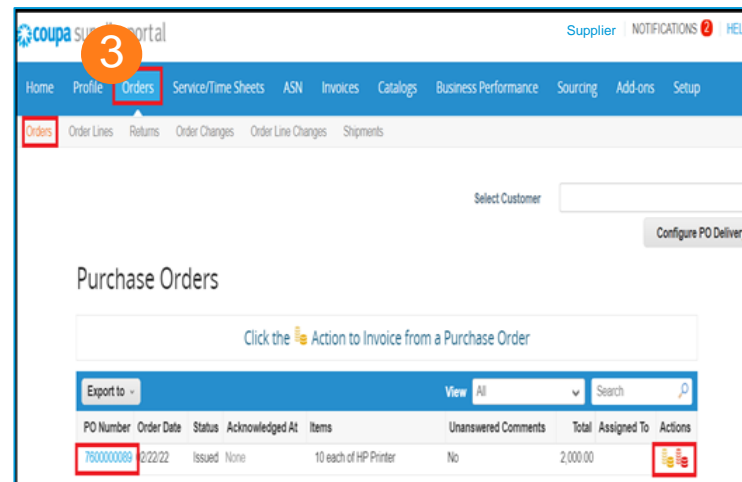
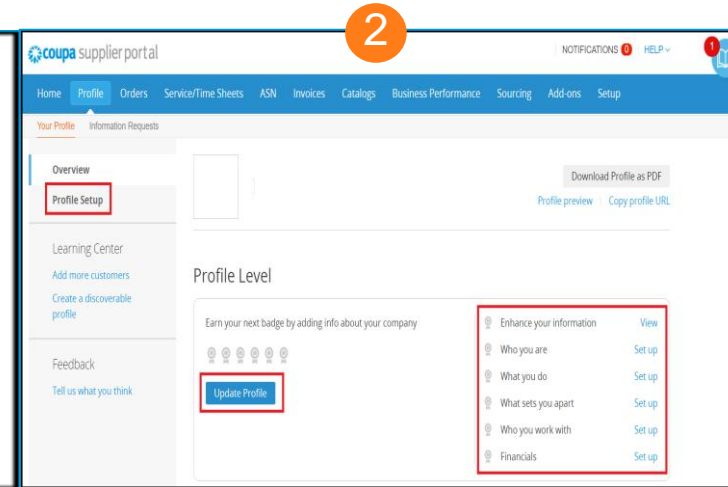
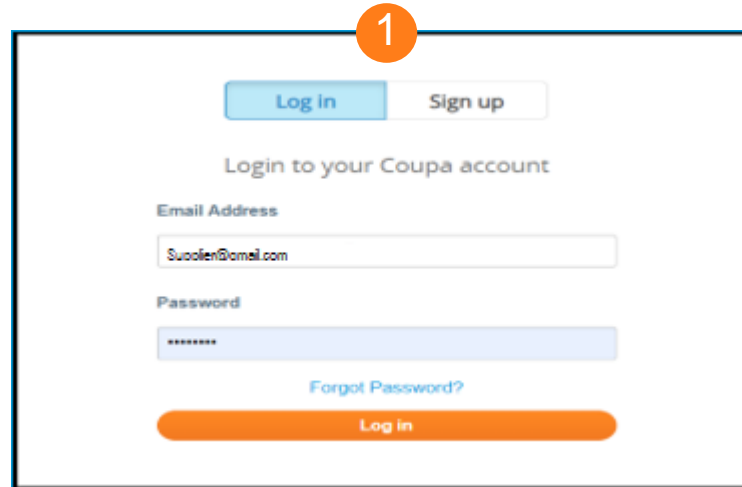




# General Navigation

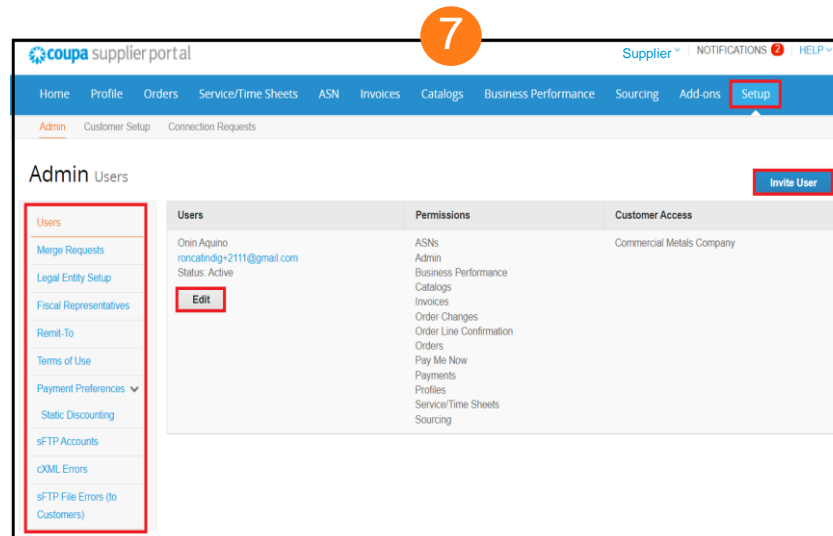
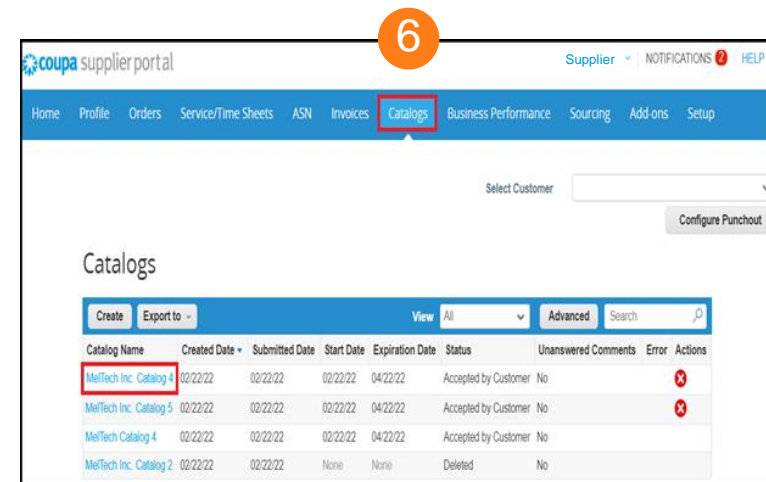
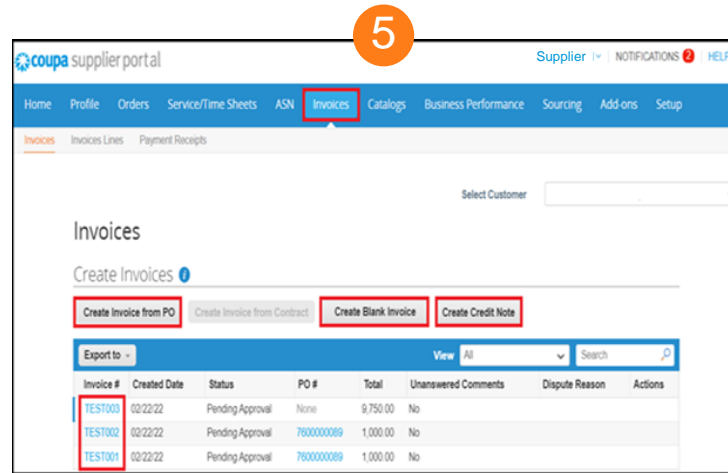
# General Navigation

1. Login with your email and password.
2. Click on Profile to complete your company's relevant information.
3. POs and PO lines can be found via the Orders tab. You may create invoices and credit notes from POs on this page.
4. The Orders tab has several subtabs: Orders, Order lines, Order Changes, and Order Line Changes.



# General Navigation

5. Invoices and invoice lines can be found on the Invoice tab. Invoices and Credit Notes can be created from this page.
6. Hosted catalogs can be viewed and maintained via the Catalog tab.
7. The Setup tab is where to manage legal entities, remit-to addresses, and other users within your organization.



# General Navigation

Suppliers may have multiple users within their organization. This is common when multiple customers use Coupa.

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The 'Setup' tab is selected in the top navigation bar. In the 'Admin Users' section, the 'Invite User' button is highlighted. A table lists users, with the 'Test Supplier' user highlighted. The 'Edit' button for this user is also highlighted. A 'Invite User' popup is open, showing fields for 'First Name', 'Last Name', and 'Email'. Below these fields are sections for 'Permissions' and 'Customers', each with a list of items and checkboxes. The 'Send Invitation' button is highlighted at the bottom right of the popup.

- To add or manage users, click the **Setup** tab.
- Click **Invite User**. A popup will appear. Clicking **Edit** on an existing user open the same popup.
- Enter the user's first name, last name, and email address. Check or uncheck permissions and/or customers to manage users' access.
- Click **Send Invitation**.

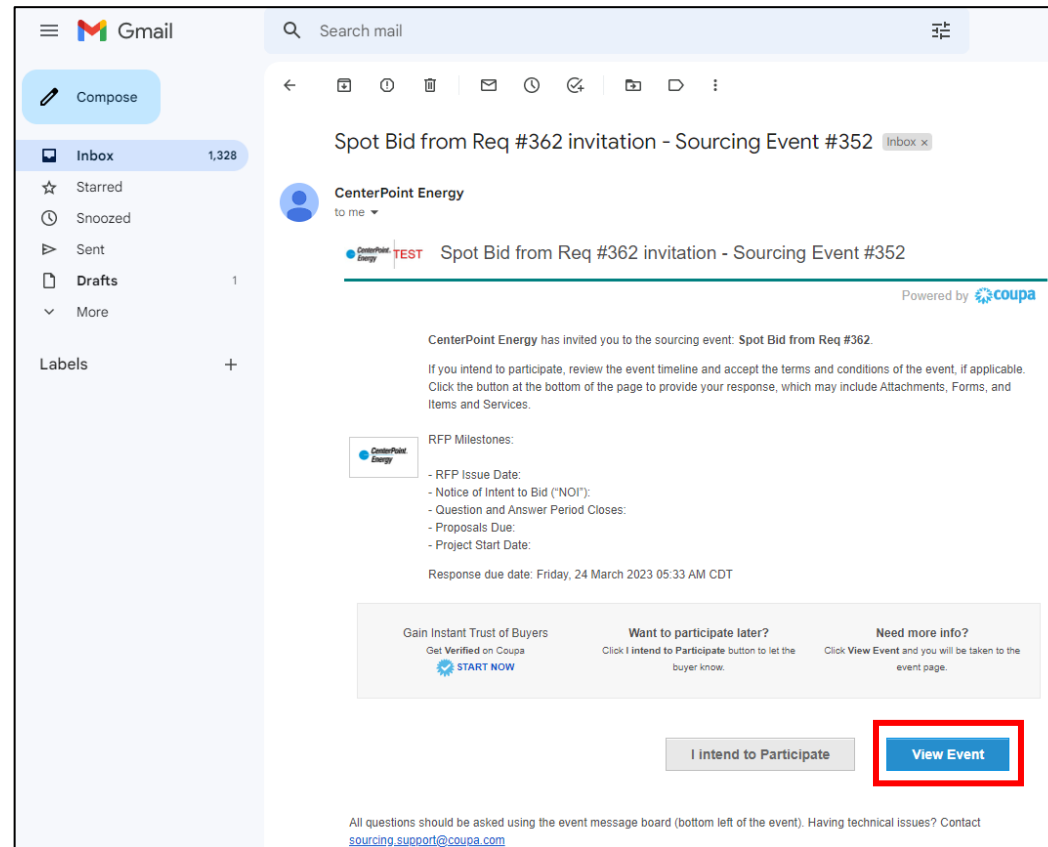
*Note: if editing an existing user, name and email will be prefilled in the popup, and the blue button will read **Save** instead of **Send Invitation**.*

## Responding to Sourcing Events (Suppliers)

# Responding to Sourcing Events (Suppliers)

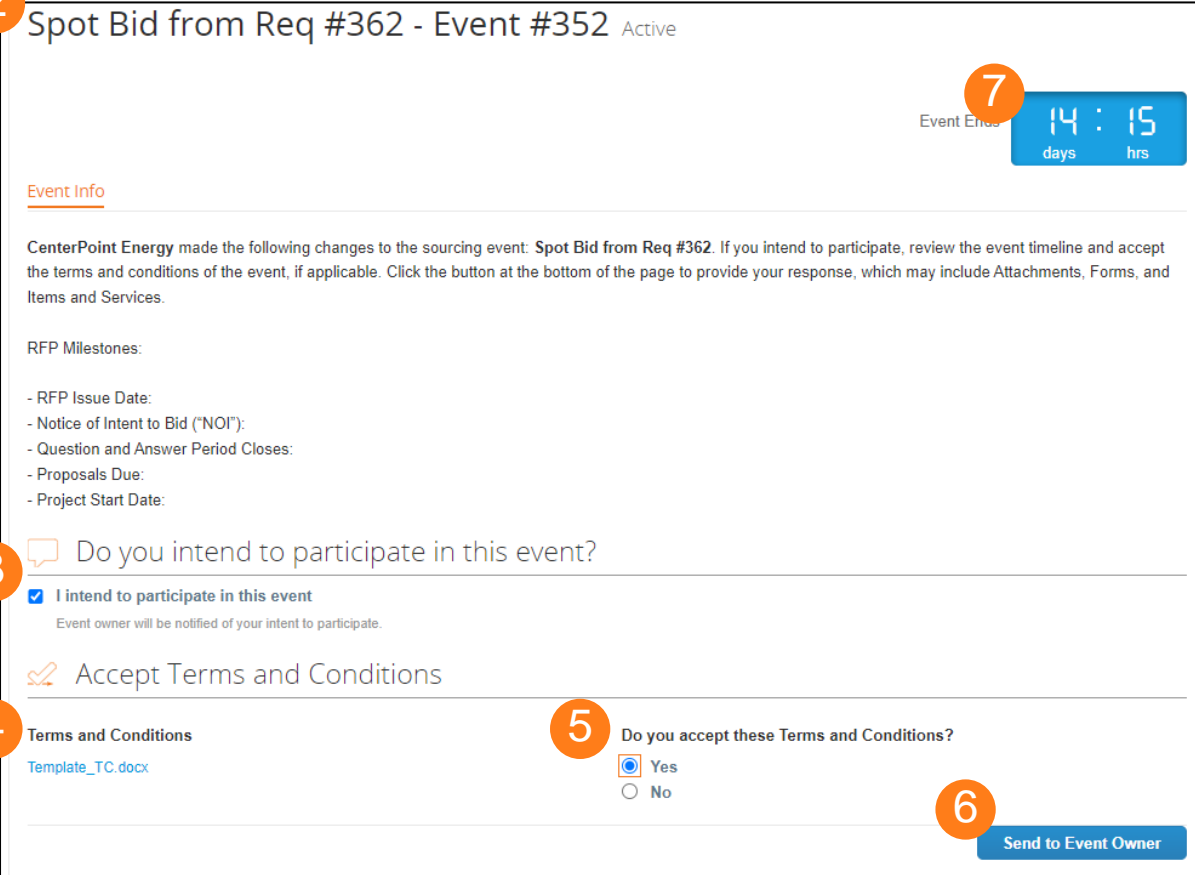
Suppliers will receive email notification when invited to a sourcing event. The notification will contain details of the buying need.

1. Click **View Event** in the email notification to be taken to the sourcing event in a new window. A one-time verification code will be sent to your email, please enter that code in order to view the Event Info page.



# Responding to Sourcing Events (Suppliers)

2. The Event Info page will open. This page will include details of sourcing event, the status of the sourcing event, and a few short questions.
3. Check the **checkbox** next to “I intend to participate in this event” if you plan to participate.
4. Download and review the **Terms and Conditions**.
5. Select Yes or No to accept or decline the Terms and Conditions.
6. Click **Send to Event Owner**. From this point, the Event Owner will receive your response and may award business to the winning response from those received.
7. The time remaining before the event closes will be displayed in the top-right of the screen.



2 Spot Bid from Req #362 - Event #352 Active


7 Event Ends 14:15 days hrs

Event Info


CenterPoint Energy made the following changes to the sourcing event: Spot Bid from Req #362. If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the button at the bottom of the page to provide your response, which may include Attachments, Forms, and Items and Services.

RFP Milestones:

- RFP Issue Date:
- Notice of Intent to Bid ("NOI"):
- Question and Answer Period Closes:
- Proposals Due:
- Project Start Date:

3  Do you intend to participate in this event?

I intend to participate in this event  
Event owner will be notified of your intent to participate.

 Accept Terms and Conditions

4 Terms and Conditions  
[Template\\_TC.docx](#)

5 Do you accept these Terms and Conditions?

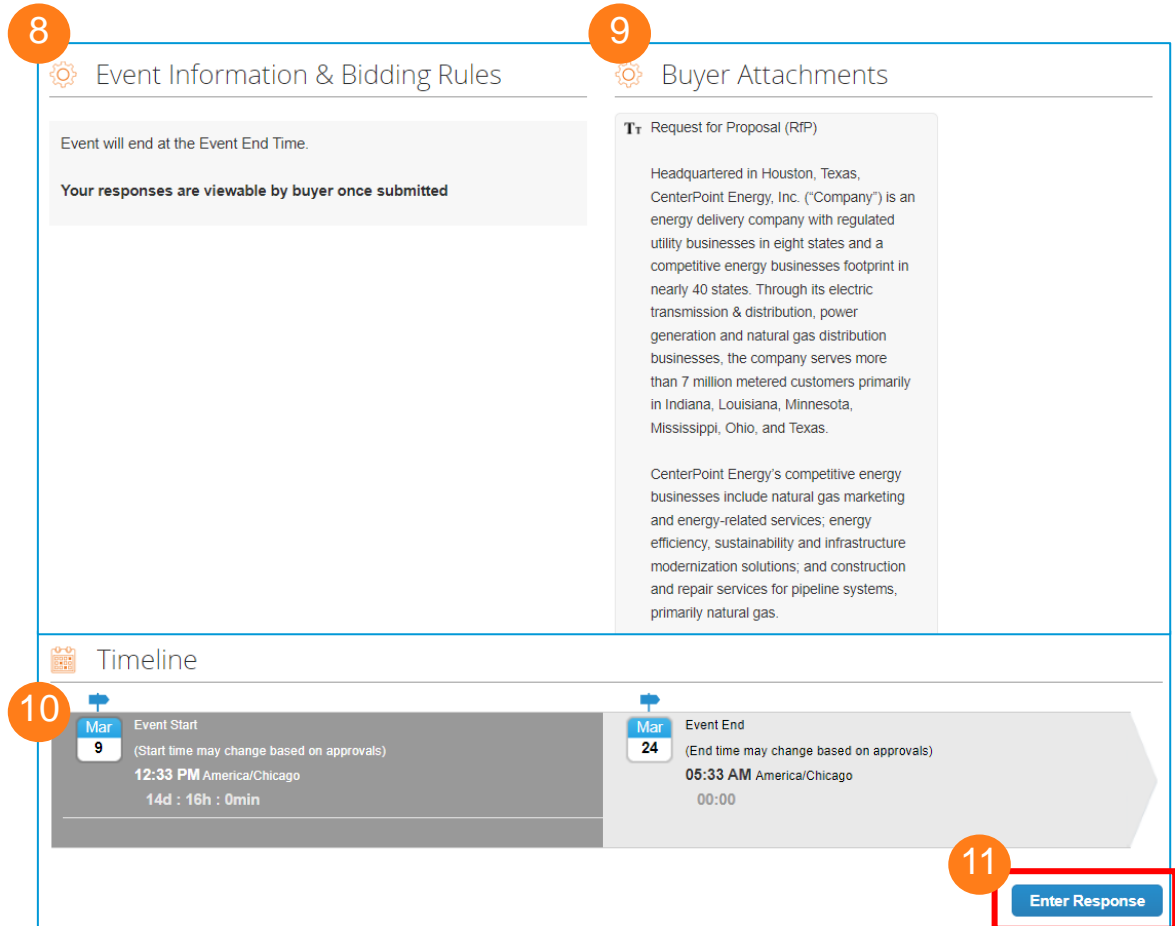
Yes  
 No

6 **Send to Event Owner**

# Responding to Sourcing Events (Suppliers)

Response details can be entered at the bottom of the Event Info page. After clicking **Send to Event Owner**, the **Enter Response** button will become available.

8. Review any details in the **Event Information & Bidding Rules** section.
9. Download and read any attachments provided by the Buyer.
10. Review the sourcing event timeline.
11. Click **Enter Response**.



The screenshot displays the 'Event Information & Bidding Rules' and 'Buyer Attachments' sections. The 'Event Information & Bidding Rules' section includes a gear icon, the title 'Event Information & Bidding Rules', and a message: 'Event will end at the Event End Time.' Below this is a grey box stating 'Your responses are viewable by buyer once submitted'. The 'Buyer Attachments' section features a gear icon, the title 'Buyer Attachments', and a document icon labeled 'Request for Proposal (RFP)'. The RFP text describes CenterPoint Energy, Inc. as an energy delivery company with regulated utility businesses in eight states and a competitive energy business footprint in nearly 40 states. It also lists services like natural gas marketing, energy efficiency, and pipeline repair. The 'Timeline' section shows a calendar icon, the title 'Timeline', and two event markers: 'Event Start' on Mar 9 at 12:33 PM (14d : 16h : 0min) and 'Event End' on Mar 24 at 05:33 AM (00:00). At the bottom right, a red-bordered button labeled 'Enter Response' is highlighted with callout 11.



# Responding to Sourcing Events (Suppliers)

After clicking **Enter Response**, the supplier will be able to enter the details of event response.

- 12. Enter a **Name** of the Response.
- 13. Review any attachments or instructions.
- 14. Your response to the Terms and Conditions will be listed.

Spot Bid from Req #362 - Event #352 Active

Event Ends 14 15  
days hrs

[Event Info](#) [My Responses](#) [Aris Supplier Ltd - #244](#)

12 Name

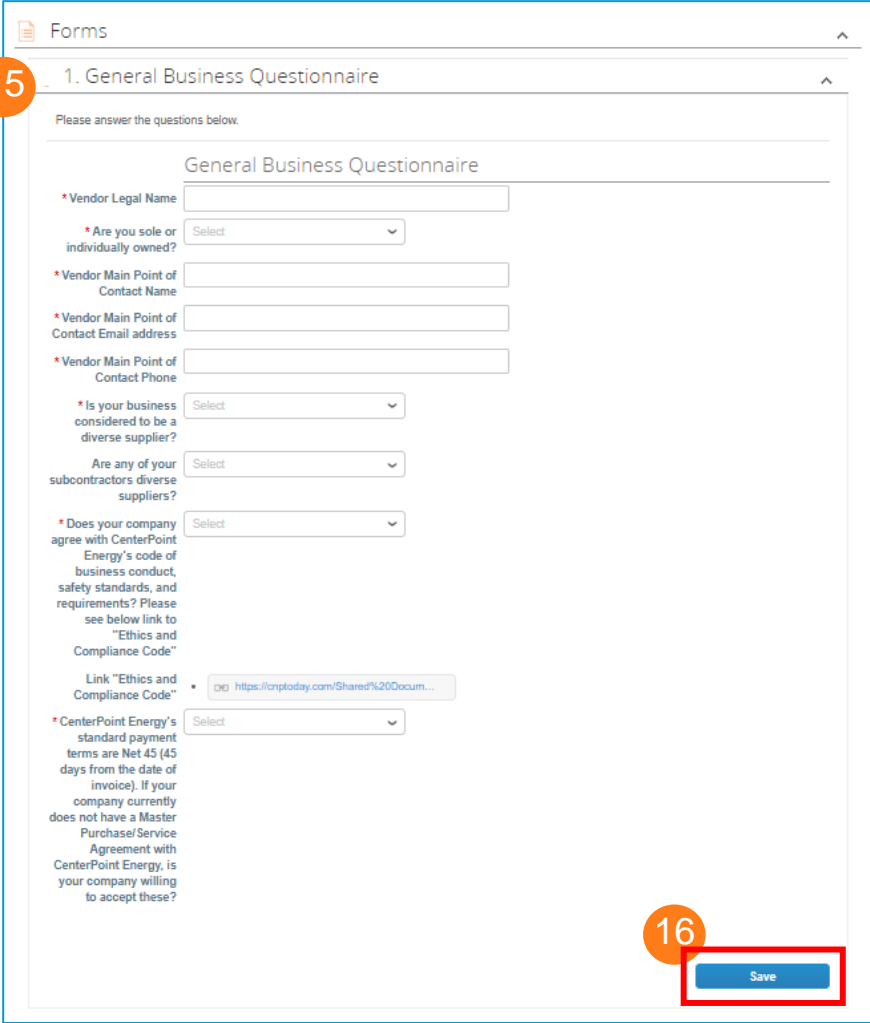
📎 Attachments ▼

<span style="border: 2px solid orange; border-radius: 50%; font-weight: bold; font-size: 1.2em; display: inline-block; margin-right: 5px;">13</span> Provided by Aris Camitan	<span style="border: 2px solid orange; border-radius: 50%; font-weight: bold; font-size: 1.2em; display: inline-block; margin-right: 5px;">14</span> Your response
<p>Contract T&amp;Cs</p> <p><b>Instructions</b>            Each respondent must submit a mark-up, in redline format, of the attached pro forma agreement, which must include all requested modifications to the pro forma agreement with respect to this Sourcing Event. The electronic copy of the mark-ups must be provided in a format capable of being opened in Microsoft Word. Respondent may also respond with any currently active and applicable agreement that it has in place with CenterPoint. CenterPoint reserves the right to determine the applicability of said agreement.</p> <p><b>Attachment</b> None</p>	<p>Response to Contract T&amp;Cs</p> <p><b>Attachment *</b>  <a href="#">Add File</a></p>

# Responding to Sourcing Events (Suppliers)

Below the attachments and Terms and Conditions, there may be a Form to complete requesting specific information from the supplier. This screenshot shows the General Business Questionnaire.

- 15. Complete the required (\*) fields.
- 16. Click **Save**.



Forms

1. General Business Questionnaire

Please answer the questions below.

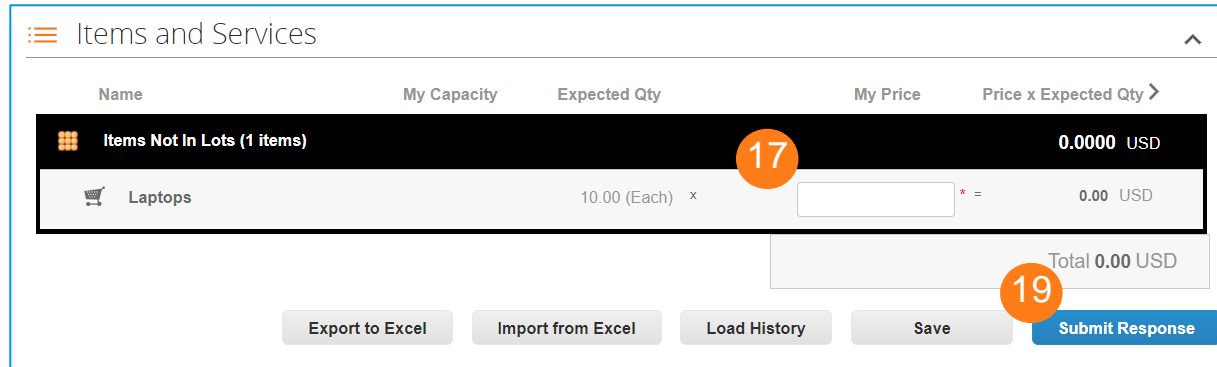
General Business Questionnaire

- \* Vendor Legal Name
- \* Are you sole or individually owned?
- \* Vendor Main Point of Contact Name
- \* Vendor Main Point of Contact Email address
- \* Vendor Main Point of Contact Phone
- \* Is your business considered to be a diverse supplier?
- Are any of your subcontractors diverse suppliers?
- \* Does your company agree with CenterPoint Energy's code of business conduct, safety standards, and requirements? Please see below link to "Ethics and Compliance Code"
- Link "Ethics and Compliance Code"
- \* CenterPoint Energy's standard payment terms are Net 45 (45 days from the date of invoice). If your company currently does not have a Master Purchase/Service Agreement with CenterPoint Energy, is your company willing to accept these?

16 Save

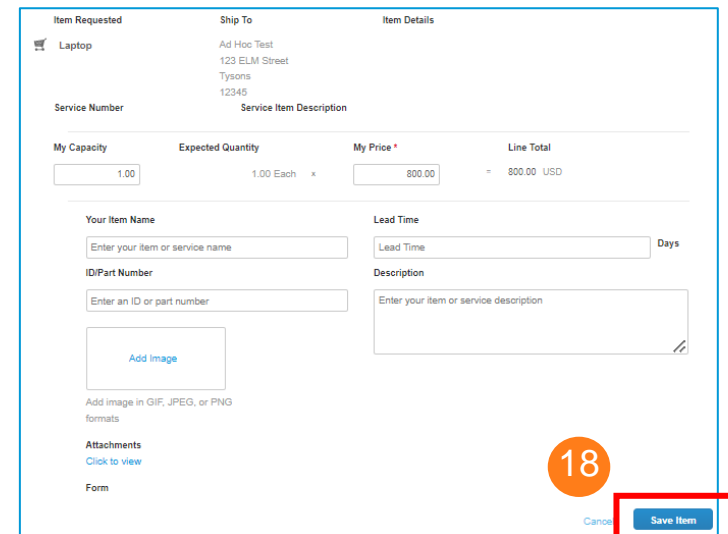
# Responding to Sourcing Events (Suppliers)

The final section of the sourcing event response page is the Items and Services section, where any included items or services will be listed.



- 17. Fill in the price and other required information for each line.
- 18. If required, expand the full item details by clicking on the line item. Click **Save Item** to save item details.
- 19. Click **Submit Response**. You may save the response without submitting by clicking **Save**.

*Note: for sourcing events with multiple items, services, or lots, you may use the bulk load function to streamline the event response. Click **Export to Excel** to download the items in an Excel template. Fill in the required details and save the file, then click **Import from Excel**.*

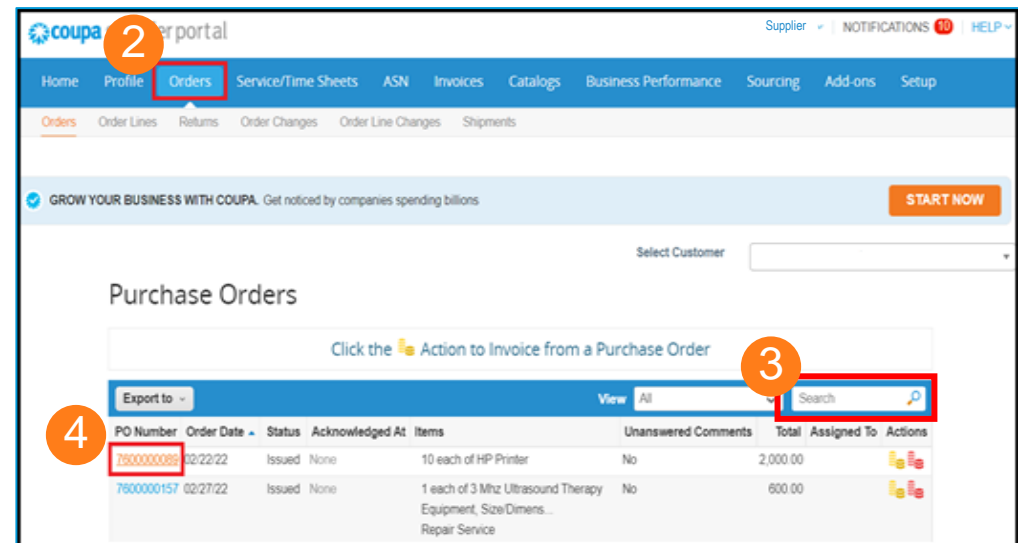
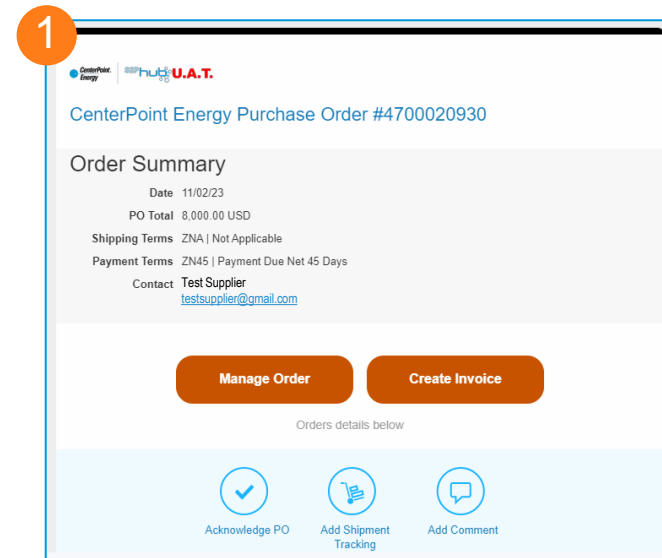


## Receiving PO (CSP and Email)

# Receiving POs (CSP and Email)

Orders are sent to suppliers through at least one of several transmission methods. The most common method is via email. POs will also be visible in the Orders tab regardless of transmission method.

1. When receiving a PO via email, the notification will contain high level details of the order, along with the option to take PO actions directly. Note: Suppliers will not be able to create invoices via email and must submit invoices from within the CSP.
2. When accessing a PO through the CSP, navigate to the **Orders** tab.
3. Use the search bar to find specific POs as needed.
4. Click the **PO number** to open the PO to see full details.



## Acknowledging a PO

# Acknowledging a PO

1. Click on the **Orders** tab to access current POs.
2. Click on the **PO Number** to open the full PO.
3. Check the **Acknowledged** checkbox to acknowledge the PO.

*Note: POs can be acknowledged directly from the email notification. See screenshot on previous slide.*

coupa supplier portal

Supplier | NOTIFICATIONS 10 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Shipments

GROW YOUR BUSINESS WITH COUPA. Get noticed by companies spending billions **START NOW**

Select Customer

### Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
7600000089	02/22/22	Issued	None	10 each of HP Printer	No	2,000.00		
7600000157	02/27/22	Issued	None	1 each of 3 Mhz Ultrasound Therapy Equipment, Size/Dimens...	No	600.00		

### Purchase Order #7600000089

#### General Info

Status: Issued - Sent via Email

Order Date: 02/22/22

Revision Date: 02/22/22

Requester: Jane Williams

Email: roncatindig+123@gmail.com

Payment Term: Z000

Attachments: None

**Acknowledged**

Assigned to:

#### Shipping

Ship-To Address: 123 Test St, Dallas, TX 12345, United States, Location Code: 2900, Attn: Jane Williams

Legal Entity:

Terms: None

Shipment Tracking: No shipment tracking.

#### Lines

Advanced Search Sort by Line Number: 0 -- 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
---	------	------	-----	------	-------	-------	----------

## Sending Shipping Notice



# Sending Shipping Notice

There are two ways to send a Shipping Notice, the CSP or from the email PO notification.

1. Either click the **Add Shipment Tracking** button on the email notification or the **Add** button on the PO under Shipment Tracking.
2. Add Tracking Number, Carrier, and an optional note.
3. Click **Save**.

The screenshot illustrates the process of adding shipment tracking to a purchase order in the Coupa Supplier Portal. It is divided into three numbered steps:

- Step 1:** Shows the 'CenterPoint Energy Purchase Order #4700020931' page. The 'Add Shipment Tracking' button is highlighted with a red box and a red arrow pointing to the 'Add' button in the 'Shipment Tracking' section of the PO details.
- Step 2:** Shows the 'Create Shipment Tracker' modal window. The 'Tracking Number' field is populated with '9876544893533'. The 'Carrier' dropdown menu is open, showing 'Fedex' selected. The 'Note' field is empty.
- Step 3:** Shows the 'Save' button at the bottom right of the 'Create Shipment Tracker' modal window.

The PO details shown include:

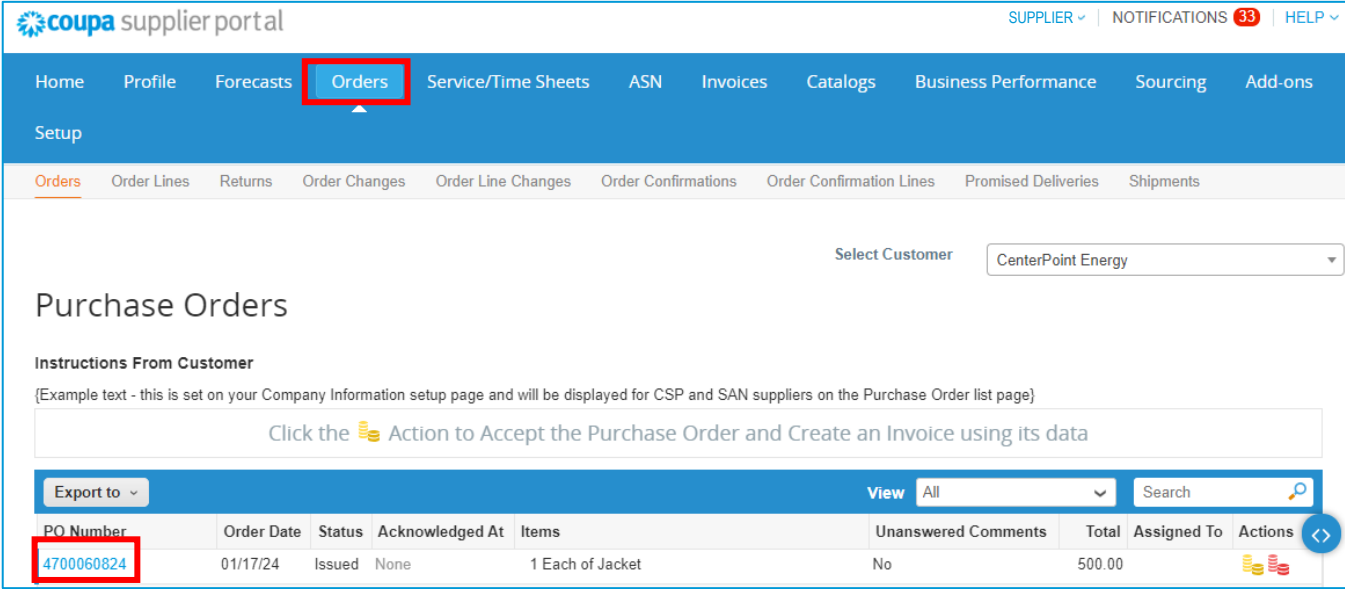
- Purchase Order #4700020931**
- General Info:** Status: Issued - Sent via Email; Order Date: 11/02/23; Revision Date: 11/02/23; Requester: Sophia Levitt; Email: smanfalevitt@crosscountry-consulting.com; Payment Term: ZN45 | Payment Due Net 45 Days; Buyer: None; Additional Instructions: None; Work Order Info: None; Attachments: None; Acknowledged: ; Assigned to:
- Shipping:** Ship-To Address: CNP - Corp Headquarters, 1111 LOUISIANA, HOUSTON, TX 77002-5230, United States, Location Code: 1201, Attn: Sophia Levitt; Terms: ZNA | Not Applicable

## Request for PO Change


# Request for PO Change

Supplier can also initiate PO changes via CSP.

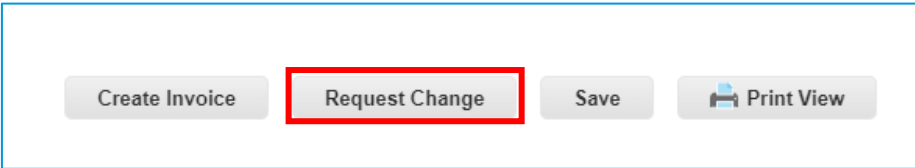
1. Go to **Orders** tab, find the PO that requires change then click the PO number.



The screenshot shows the Coupa Supplier Portal interface. The 'Orders' tab is highlighted in the top navigation bar. Below the navigation bar, there is a 'Purchase Orders' section with a 'Select Customer' dropdown menu set to 'CenterPoint Energy'. Below this, there is a table of purchase orders. The first row in the table has the PO number '4700060824' highlighted in a red box.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
4700060824	01/17/24	Issued	None	1 Each of Jacket	No	500.00		

2. At the bottom part of the page, click **Request Change** button.



The screenshot shows a row of four buttons: 'Create Invoice', 'Request Change', 'Save', and 'Print View'. The 'Request Change' button is highlighted in a red box.

# Request for PO Change

- Supplier can update the details of the PO i.e Qty or Price. It is required to provide Reason for Change and Comment (required for "Other").

Lines

Type	Item	* Qty	Unit	* Price	Total
1	Jacket	1.00	Each	500.000000	500.00 <span style="color: red;">✕</span>

Need By Date:

---

Item Detailed Text: None      SAP Plant: None      SAP Storage Location: None

ERS Indicator: No

Total 500.00 USD

Cancel
Request PO Cancellation
Save Change Request
Submit Change Request

\* Reason for Change  
Other

\* Comment (required for "Other")  
Price update



Change request for Purchase Order #4700060824 has been submitted for approval.

- Once all required fields are populated, click **Submit Change Request** button. This changes will be sent to the requester for approvals.

## Creating an Invoice from a PO


# Create an Invoice from PO (1/3)





There are two ways to create an invoice or credit note from a PO, from within a PO or from the main Orders tab.

1. From the Orders tab, click the (  ) yellow coins Invoice icon or the (  ) red coins Credit Note button.
2. You may also open a PO from the Orders tab, then click **Create Invoice** under the line items.

**1** Purchase Orders


Instructions From Customer  
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
4700020931	11/02/23	Issued	11/02/23	10 Each of Laptops	No	8,000.00		 
4700020930	11/02/23	Issued	None	10 Each of Laptops	No	8,000.00		 

**2**

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Laptops	10	Each	800.00	8,000.00	0.00

Supplier Part Number	Manufacturer-Part Number	Item Detailed Text	SAP Plant	SAP Storage Location	ERS Indicator
None	None	None	None	None	No

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Total USD **8,000.00**

Create Invoice Save Print View


## Create an Invoice from PO (2/3)

A draft Invoice will open with data prefilled from the PO.


3. Review the header details and add any missing information or required fields.
  - a. Invoice Number: the invoice number must be unique
  - b. Invoice Date: choose the invoice date
  - c. Image Scan: upload a text-based PDF copy of the invoice
  - d. Attachments: include any needed attachments.

3

### Create Invoice Create

 General Info

**a** \* Invoice #

**b** \* Invoice Date  

Payment Term ZN45 | Payment Due Net 45 Days

\* Currency USD

Delivery Number

Status Draft

**c** Image Scan  No file chosen

Supplier Note

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

# Create an Invoice from PO (3/3)

This example is for a Qty PO. An Amt PO would include a **Price** field instead of **Qty**.

4. Review the line-level details and add any missing information or required fields.
  - a. QTY or AMT: enter either the quantity to be paid or the amount of service to be paid.
  - b. Shipping: enter any applicable shipping costs
5. Click **Calculate** to **total** the invoice.
6. Click **Save as Draft** or **Submit**.
7. Use the Comment section to communicate with CenterPoint Energy about specific invoices.

**4** Lines ☐ Line Level Taxation

Type	Description	Qty	UOM	Price	
	Laptops	10.00	Each	800.00	8,000.00 <span style="color: red;">✖</span>

PO Line: 4700020931-1    Service/Time Sheet Line: None    Contract: ▼    Credit Line: None 🔗

Supplier Part Number:     Billing: 533010-K-156211-0002-1156200

+ Add Line    + Pick lines from Contract

---

**Totals & Taxes**

Lines Net Total	8,000.00
Shipping	<input type="text"/>
Tax	<span style="border: 1px solid gray; padding: 2px;">▼</span> 0.000 % 0.000
Total Tax	0.00
Net Total	8,000.00
<b>Total</b>	<b>8,000.00</b>

Delete    Cancel    Save as Draft    Calculate    Submit

---

**7** Comment Mute Comments ^

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

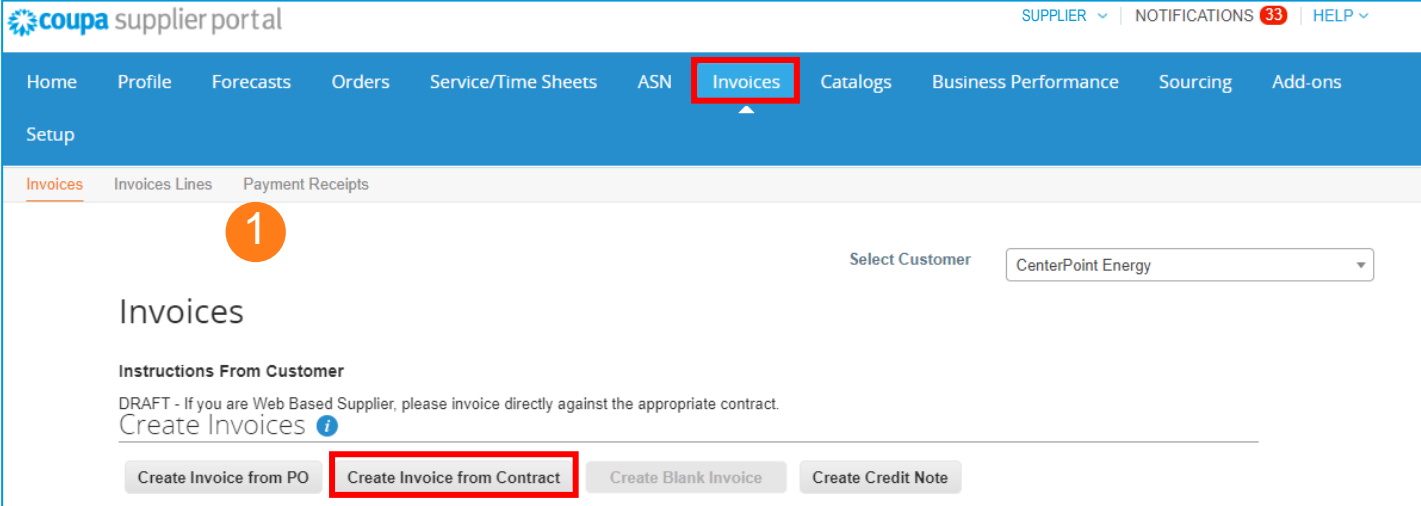
Add Comment



## Creating an Invoice Backed by a Contract

# Creating an Invoice Backed by a Contract

1. Go to **Invoice** tab, click on **Create Invoice from Contract**



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Setup

Invoices Invoices Lines Payment Receipts

1

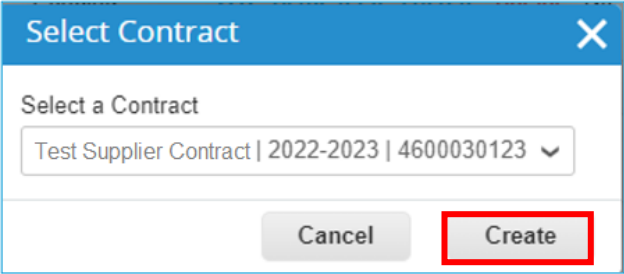
Select Customer CenterPoint Energy

## Invoices

**Instructions From Customer**  
DRAFT - If you are Web Based Supplier, please invoice directly against the appropriate contract.  
Create Invoices [i](#)

Create Invoice from PO **Create Invoice from Contract** Create Blank Invoice Create Credit Note

2. Select the valid contract to create the invoice against, then click **Create** button.



Select Contract

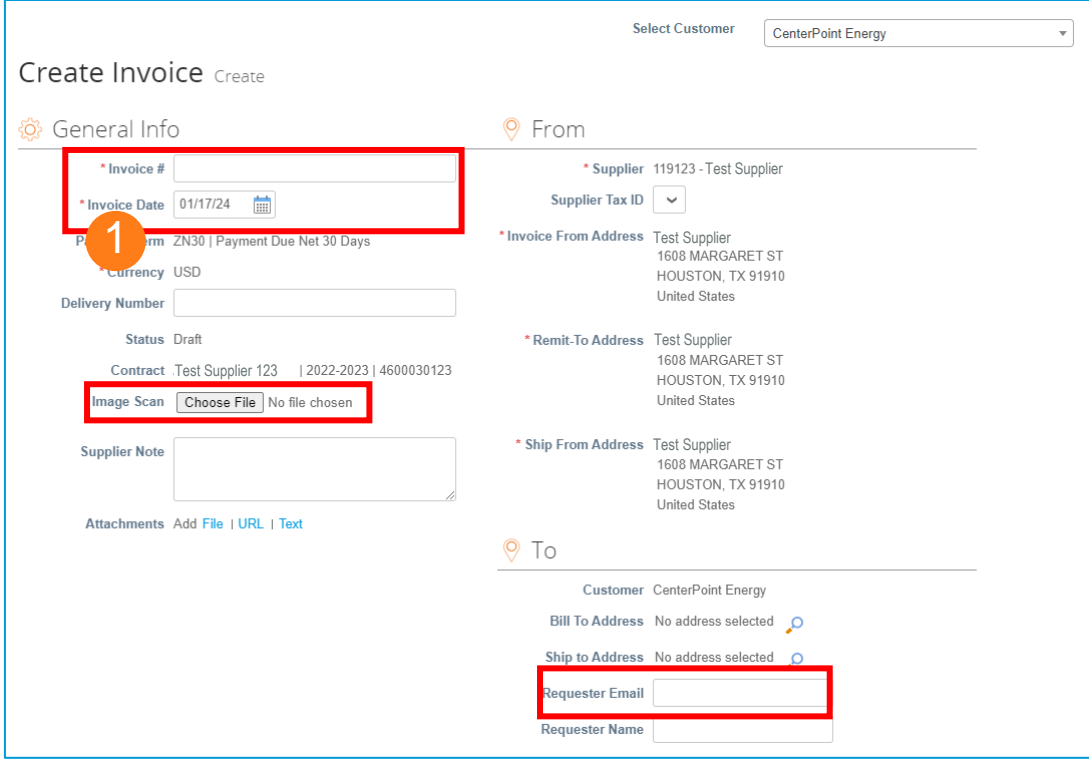
Select a Contract

Test Supplier Contract | 2022-2023 | 4600030123

Cancel **Create**

# Creating an Invoice Backed by a Contract

3. Create Invoice page will be displayed, populate all required fields on the invoice header section.



Select Customer: CenterPoint Energy

### Create Invoice Create

**General Info**

- \* Invoice #
- \* Invoice Date 01/17/24
- Payment Term ZN30 | Payment Due Net 30 Days
- \* Currency USD
- Delivery Number
- Status Draft
- Contract .Test Supplier 123 | 2022-2023 | 4600030123
- Image Scan  No file chosen
- Supplier Note
- Attachments [Add File](#) | [URL](#) | [Text](#)

**From**

- \* Supplier 119123 - Test Supplier
- Supplier Tax ID
- \* Invoice From Address Test Supplier  
1608 MARGARET ST  
HOUSTON, TX 91910  
United States
- \* Remit-To Address Test Supplier  
1608 MARGARET ST  
HOUSTON, TX 91910  
United States
- \* Ship From Address Test Supplier  
1608 MARGARET ST  
HOUSTON, TX 91910  
United States

**To**

- Customer CenterPoint Energy
- Bill To Address No address selected
- Ship to Address No address selected
- Requester Email
- Requester Name

# Creating an Invoice Backed by a Contract

- Populate the invoice Line level section and then click **Submit**. Popup window will be displayed to verify the total amount of invoice to be submitted, click **Send Invoice** to complete the process.

Lines
 Line Level Taxation

Type	Description	Qty	UOM	Price	
Qty ▾	Tools	1,000	1/cubic centir ▾	1,000.00	1,000.00 ✕

PO Line  
None

Service/Time Sheet Line  
None

Supplier Part Number

+ Add Line   + Pick lines from Contract

**Totals & Taxes**

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

Delete
Cancel
Save as Draft
Calculate
Submit

Are You Ready to Send?
✕

You're about to send an invoice to CenterPoint Energy for a total amount of 1,000.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing
Send Invoice

119123 · Test Supplier
invoice #INV Contract 1 is processing

## Checking Invoice Status

# Checking Invoice Status

Use the Invoice tab to check the status of Invoices. Preconfigured views allow you to see different sets of invoices.

## Invoices

### Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices 

Create Invoice from PO


Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to ▼

View ▼

Search 

Invoice #	Created Date	Status	PO #	Total	Unanswered	Person	Actions
TST-POF_INV01	10/11/23	Approved	4	1,500.00 USD	No		
TST-CSP_INV01	10/11/23	Approved	3	1,500.00 USD	No		

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2

3

Next

All

All

Abandoned

Approved

Credit Notes

Disputed

Disputes with a supplier response

Disputes without supplier response

Draft

Overdue invoices

Payment Information

Pending Approval

Processing

Unpaid invoices

Voided

Create View

# Checking Paid Invoices

1. To view all invoices, click Invoices.
2. Click Create View on the View dropdown.
3. Enter the name of the report.
4. Add condition: Paid=Yes.
5. Drag the information that you need in your report. Then, click Save.
6. Paid invoices are displayed.

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Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer CenterPoint Energy

Invoices

Instructions From Customer  
[Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page]  
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 #	Total	Unanswered	Comments	Actions
TST-POF_INV01	10/11/23	Approved	4	1,500.00 USD	No		
TST-CSP_INV01	10/11/23	Approved	3	1,500.00 USD	No		

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## Create New Data Table View

### General

Name **Paid Invoices**

Visibility  Only Me  
 Everyone

Start with view All

### Conditions

Match Conditions Match all conditions

Filter By **Paid** is **Yes**

### Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Total
Disputed Date	Unanswered Comments
Document Type	Dispute Reason
Invoice Date	Actions
Last Updated Date	<b>Paid</b>

## Invoices

### Instructions From Customer

DRAFT - If you are Web Based Supplier, please invoice directly against the appropriate contract.

### Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to - View **Paid Invoice** Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	<b>Paid</b>	Actions
TEST HP 1249	10/11/23	Approved	4508215806	2,090.00	No		Yes	
TEST HP 1248	10/11/23	Approved	4508215817	30.00	No		Yes	
INV9.21v2	09/21/23	Approved	4700020741	53.75	No		Yes	
INV9.21v1	09/21/23	Approved	4700020741	86.00	No		Yes	

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*Note: The same steps can be followed with various conditions and columns to create your own custom views*

# Support



# Support Resources

1. [Click here](#) for more support information.
2. For additional support, email [DigitalProcurement@centerpointenergy.com](mailto:DigitalProcurement@centerpointenergy.com)

**Thank you**