

Humana®

Coupa Finding Invoices and Payments Quick Reference Guide

July 2023

Enterprise Procurement & Payment Services

Finding Invoices and Payments in Coupa

Find Invoices

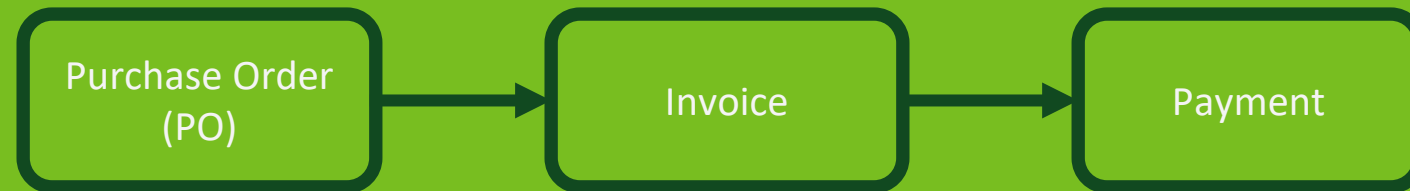
1. [Find an invoice by searching all invoices via Invoices tab](#)
2. [Find an invoice from the purchase order \(PO\)](#)

Invoice Details

1. [Invoice header](#)
2. [Invoice lines](#)
3. [Invoice payment details](#)

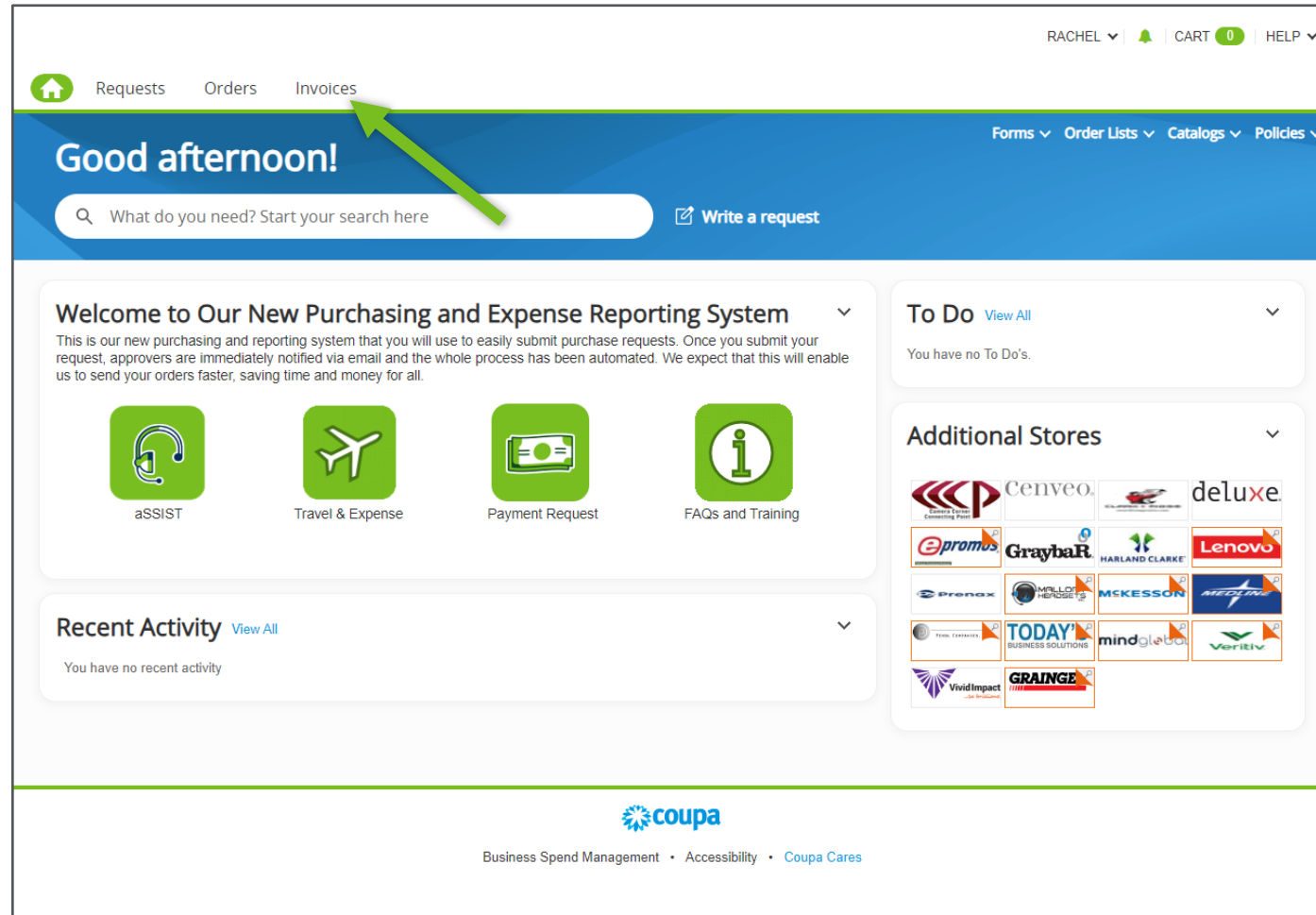
If you wish to verify if a purchase order has been paid, an invoice must be submitted against the purchase order by the supplier before it can be paid.

You must find the invoice(s) invoiced against the PO and verify the payment(s) on the invoice(s) using **Find an invoice from the PO** and then verifying the **Payment details** on the invoices linked to the PO.



Find Invoices: Search All Invoices

CLICK on the **Invoices** tab from the Coupa Homepage to view all invoices



Find Invoices: Search All Invoices

Search and Advanced Filtering Capabilities

- 1) Use the **Search** box to do a simple search of all invoices
- 2) Use the **Advanced** option to enable the **Match Conditions** and **Filter By** options for use in your search parameters
 - a) Selecting the + icon will add additional **Filter By** parameters
- 3) Select **Search** once you've finished filling in your parameters to populate your results
- 4) Once you find your invoice, select the **Invoice # hyperlink** to view the invoice details

The screenshot shows the 'Invoices' search interface. At the top, there is a search bar with the placeholder text 'What do you need?'. Below it, there are navigation tabs for 'Requests', 'Orders', and 'Invoices'. The 'Invoices' tab is active. The main content area is titled 'Invoices' and contains a search bar with a 'View' dropdown set to 'All', an 'Advanced' button, and a search input field. Below the search bar, there are 'Match Conditions' and 'Filter By' options. The 'Filter By' dropdown is set to 'Invoice #', and the 'Filter Clause' is set to 'is'. There is a '+ icon' to add more filter conditions. A 'Search' button is located to the right of the filter options. Below the search bar, there is a table of invoices with columns: Invoice #, Supplier, Net Due Date, Total, Status, Delivery Method, and Action. The table contains several rows of invoice data. Green callouts are placed on the interface: '1' is above the search bar, '2' is above the 'Advanced' button and the 'Filter By' dropdown, '3' is above the 'Search' button, and '4' is above the 'Invoice #' column header. A green arrow points from the 'Search' button to the 'Invoice #' column header.

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Action
RECURRING20234427298378CN070770_4	Broadridge Mail LLC	None	4,800.000.00	Approved	Integration (API)	
1200360073	ACCESS NURSE PM, LLC	None	1,000.00	Approved	Integration (API)	
2275541252	MEDLINE INDUSTRIES, INC.	None	4,903.24	Approved	Integration (API)	
2275800194	MEDLINE INDUSTRIES, INC.	None	5.52	Approved	Integration (API)	
2275752191	MEDLINE INDUSTRIES, INC.	None	16.57	Approved	Integration (API)	
KentukyJuly2023	MICHAEL A. ILLOVSKY DBA ADVANCED CARDIAC DIAGNOSTICS LLC	None	660.00	Approved	Integration (API)	
2275753511	MEDLINE INDUSTRIES, INC.	None	44.30	Approved	Integration (API)	
2275541246	MEDLINE INDUSTRIES, INC.	None	608.37	Approved	Integration (API)	
2275796512	MEDLINE INDUSTRIES, INC.	None	2,943.56	Approved	Integration (API)	
LasVegasJuly2023	MICHAEL A. ILLOVSKY DBA ADVANCED CARDIAC DIAGNOSTICS LLC	None	15,345.00	Approved	Integration (API)	
UniversityJuly2023	MICHAEL A. ILLOVSKY DBA ADVANCED CARDIAC DIAGNOSTICS LLC	None	330.00	Approved	Integration (API)	
INV1518955	RAIN AGENCY, INC. DBA RAIN THE GROWTH AGENCY	None	181,016.50	Approved	Integration (API)	
2275753522	MEDLINE INDUSTRIES, INC.	None	659.61	Approved	Integration (API)	
2275800193	MEDLINE INDUSTRIES, INC.	None	7.55	Approved	Integration (API)	

Find Invoices: From a Purchase Order (PO)

Selecting the **Lines hyperlink** will navigate to the line details for the PO

Select any of the following **Invoiced Amount hyperlinks** to view invoiced amounts:

- 1) Approved Invoiced:** Shows all approved invoices that correspond to this PO line
- 2) Pending Invoiced:** Shows you all submitted invoices that are pending the PO requester's approval that correspond to this PO line
- 3) Total Invoiced:** Shows you all submitted invoices, both approved and unapproved, that correspond to this PO line

General Info **Lines** Comments (1) History

Lines

Advanced Search Sort by Line Number: 0 → 9

Bulk Change Status

Type	Item	Qty	Unit	Price	Total
1	Exam Table Paper: Standard Exam Table Paper, Smooth, 21" x 225"	4	Case	23.52 USD	94.08 USD

Status

Soft Closed for Receiving and Invoicing

Received 0

Approved Invoiced 94.08 USD

Pending Invoiced 0.00 USD

Total Invoiced 94.08

Supplier Part Number: NON23326 Contract: Master Agreement... * Commodity: MEDICAL SUPPLIES Manufacturer Name: MEDLINE

Manufacturer Part Number: NON23326 Receipt Approval Required: No Savings (%): 0 Assist Case Number: None

APRIMO #: None Contract Type: None Tax Amount: 7.880000000000001 DPAS Rating: None

Find Invoices: From a Purchase Order (PO)

- 1) Selecting any of the **Invoiced Amounts hyperlinks** brings you to the **Invoices tab**, showing you the list of all invoices associated to the *PO line*
- 2) It does this by automatically **Advanced filtering** invoices using criteria of the *PO, PO line*, and if you selected **Approved** or **Unapproved**
- 3) You may remove any of these filters by selecting the **x** to the right of the filter you desire to remove and select **Search** again to re-populate your results
- 4) Once you find your invoice, select the **Invoice # hyperlink** to view the invoice details

Tip: To view all invoices submitted against the **PO in total** and not just **the PO line**, select **x** to the right of all filters *excluding PO ID* and **Document type**.

These two conditions filter **invoices** associated to the **PO** you came from (also shown in the PO ID Filter Text parameter field, excluding the CN prefix and any preceding 0s).

The screenshot shows the Coupa Invoices page with the following elements:

- Search bar: "What do you need?"
- User: RACHEL
- Cart: 0
- Help: HELP
- Navigation: Requests, Orders, **Invoices**
- Sub-navigation: **Invoices**, Invoice Lines, Uninvoiced Orders
- Filtering section:
 - Export to: [dropdown]
 - View: All
 - Advanced: [button]
 - Search: [button]
 - Match Conditions: Match all conditions
 - Add group of conditions: [button]
 - Filter 1: Filter By PO ID, Filter Clause is, Filter Text 48979
 - Filter 2: and Filter By Line, Filter Clause is, Filter Text 1
 - Filter 3: and Filter By Status, Filter Clause is, Filter Text Abandoned, AP Hold, Approved
 - Filter 4: and Filter By Document Type, Filter Clause is, Filter Text Invoice
 - Remove buttons (x) are visible to the right of filters 1, 2, 3, and 4.
- Table of invoices:

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions
2276713717	MEDLINE INDUSTRIES, INC.	None	1,153.27	Approved	Integration (API)	
- Buttons: Cancel, Search
- Footer: coupa Business Spend Management • Accessibility • Coupa Cares

Numbered callouts in the image:

- 1: Points to the Invoice # 2276713717 in the table.
- 2: Points to the filter criteria for PO ID and Line.
- 3: Points to the remove (x) buttons for the filters.
- 4: Points to the Invoice # hyperlink in the table.

Invoice Details: Invoice Header

Once in the invoice, the header will show you the invoice's **General Information**

- 1) A copy of the invoice will be available under **Attachments**
- 2) Invoice tab hyperlinks will take you to that designated area of the invoice, expanding on their respective details

What do you need? RACHEL CART 0 HELP

Home Requests Orders **Invoices**

Invoices Invoice Lines Uninvoiced Orders

Invoice #2276554537

2 [General Info](#) [Lines](#) [Totals & Taxes](#) [Comments](#) [Payments](#) [History](#)

Add Tag

General Info

Supplier MEDLINE INDUSTRIES, INC. (Active)
Invoice # 2276554537
Invoice Date 07/18/23
Payment Term 1% 45, N60
Currency USD
Control Total None
Coupa Import Status Approved
Payment Due Date None
Supplier Note None

Bill To & Ship To

Chart of Accounts Humana Inc
Buyer Tax ID None

Supplier Info

Remit To No address selected
Invoice From No address selected
Ship From No address selected
Supplier Tax ID None
Override Tax Country None

1 Attachments

- RE_ACTION_NEEDED_Vendor_Name-MEDLINE_INDUSTRIES_INC_Invoice_2276554537_on_HOLD_-_Purchase_Order_CN032095_Overbilled.msg

Image Scan None

Invoice Details: Invoice Line Detail

- Selecting the **Lines hyperlink** will navigate to the lines of the invoice
- All invoice line detail will be shown in this area

General Info **Lines** Totals & Taxes Comments Payments History

Lines

Advanced Search Sort by Line Number: 9 → 0

7	Type	Description	Quantity	UOM	Price	
		Injections: Prevnar 13 Pneumococcal 13-valent Conjugate Vaccine, Prefilled Syringe, 10 x 0.5 mL	3	BX	2,161.79	6,485.37

PO Line: CN032095-1 Supplier Part Number: 0005-1971-02 Commodity: MEDICAL SUPPLIES Contract: None

Period: None Oracle Line ID: 80439_7

Billing
Humana Inc
Conviva Care Solutions-'Conviva Military Trail; Conviva Military Trail| 875 MILITARY TRAIL 103, 200, 208, 210| JUPITER| FL 33458-5700'-Conviva Staffed Medical Center Admin-Medical Supplies-Default-Product-Default-Geography-Default-Business Segment-Default-Platform-Default-Contract-Default-Intercompany
423-06015-10719-62426-000-0000-00-00-00000-000

Taxes

Tax Code	Rate	Amount	Tax Reference	Tax Supply Date
None		0.00		

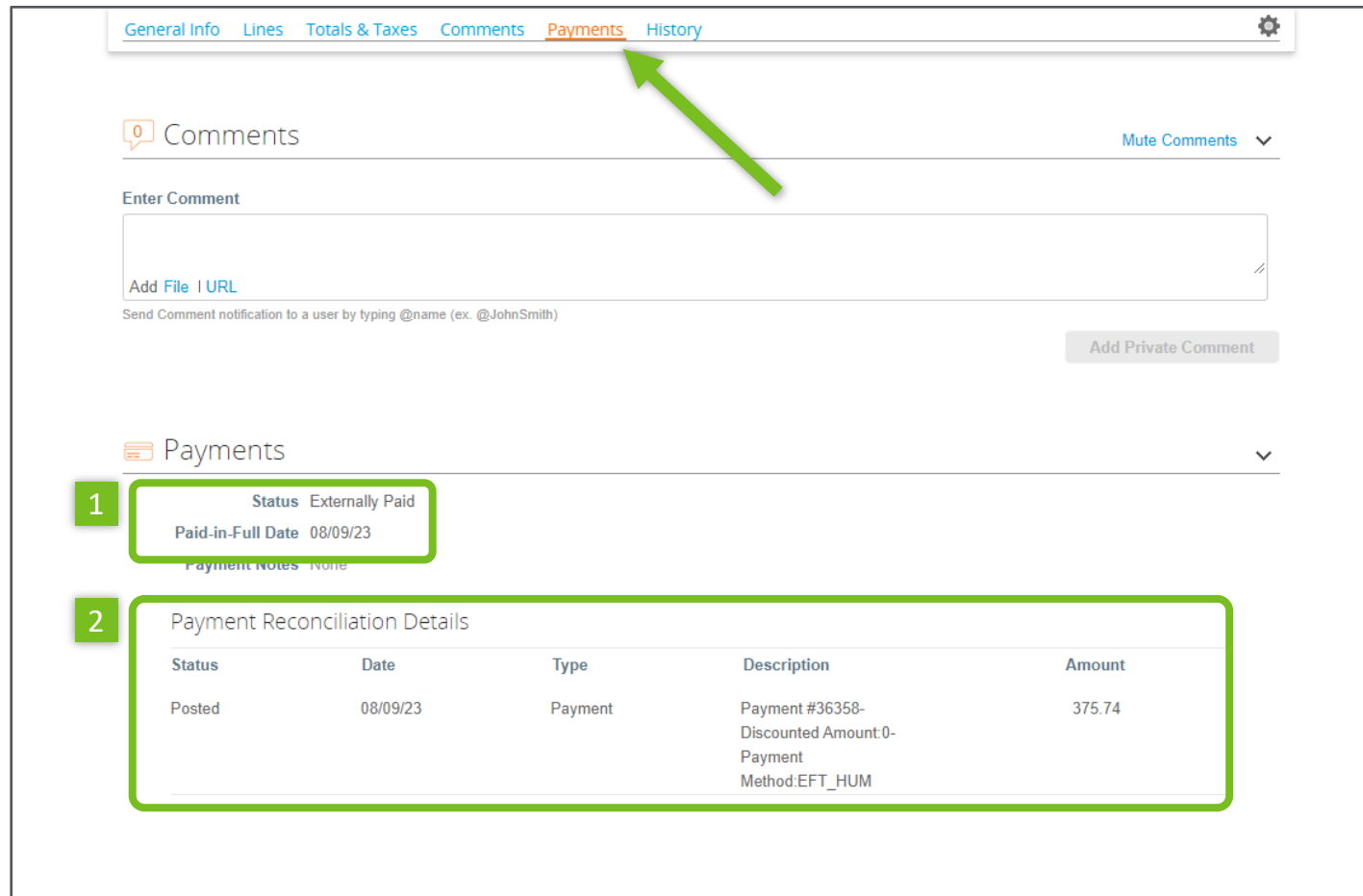
Add Tag

1	Type	Description	Quantity	UOM	Price	
		DISCARDED LINE - This invoice billed erroneously. See history for	0	BX	0.00	0.00

Invoice Details: Invoice Payment Detail

Selecting the **Payments hyperlink** will navigate to the payment details for the invoice

- 1) The **Status** will show if the invoice has been paid yet
- 2) The **Payment Reconciliation Details** will show the details of the payment



General Info Lines Totals & Taxes Comments **Payments** History

Comments Mute Comments

Enter Comment

Add File | URL

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

Add Private Comment

Payments

1 Status Externally Paid
Paid-in-Full Date 08/09/23
Payment Notes None

2 Payment Reconciliation Details

Status	Date	Type	Description	Amount
Posted	08/09/23	Payment	Payment #36358- Discounted Amount: 0- Payment Method:EFT_HUM	375.74