(Suppliers) Managing POs, Invoices, & Payments with Atlantic Aviation

Quick Reference Guide (QRG)

Updated 10/29/2025

Contents

0. Introduction

Section Overview: This section explains the key changes for suppliers receiving POs, submitting invoices, and receiving payments from Atlantic Aviation.

0.1 Key Changes for Suppliers

Atlantic Aviation is implementing Coupa as its new system for issuing and managing Purchase Orders (POs), receiving invoices, and managing payments. Below highlights how Suppliers will transact with Atlantic Aviation differently using Coupa:

- Atlantic Aviation will be sending electronic purchase orders (PO) for Suppliers to fulfill and invoice against. All POs will now be **delivered electronically through the following channels:**
    - **Coupa Supplier Portal (CSP):** For Suppliers who have a CSP account, you will also be able to log into Coupa to manage POs and Invoices for Atlantic Aviation.
    - **Purchase Order (PO) Email:** Suppliers will receive an email with links to view the PO, manage & act on the PO and create an invoice.
    - **cXML:** If enabled with Atlantic Aviation, Suppliers can receive purchase orders directly to their system. To enable cXML, reach out to procurement@atlanticaviation.com

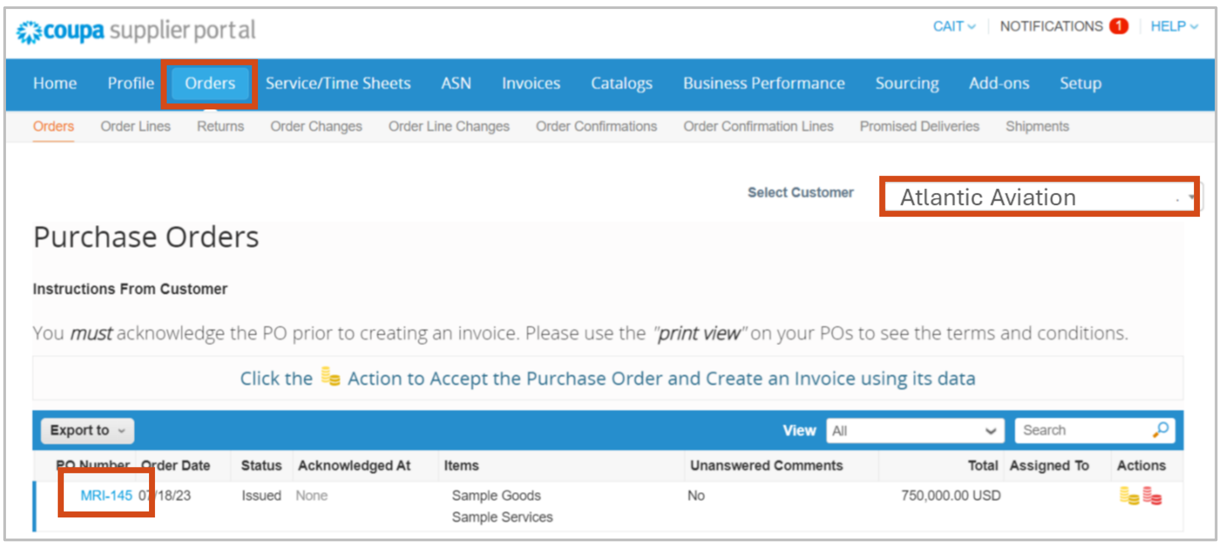
Tip: **It is highly recommended that you set up a CSP account to simplify the invoice & payment process.**

1. Transacting with Atlantic Aviation via Coupa Supplier Portal (CSP)

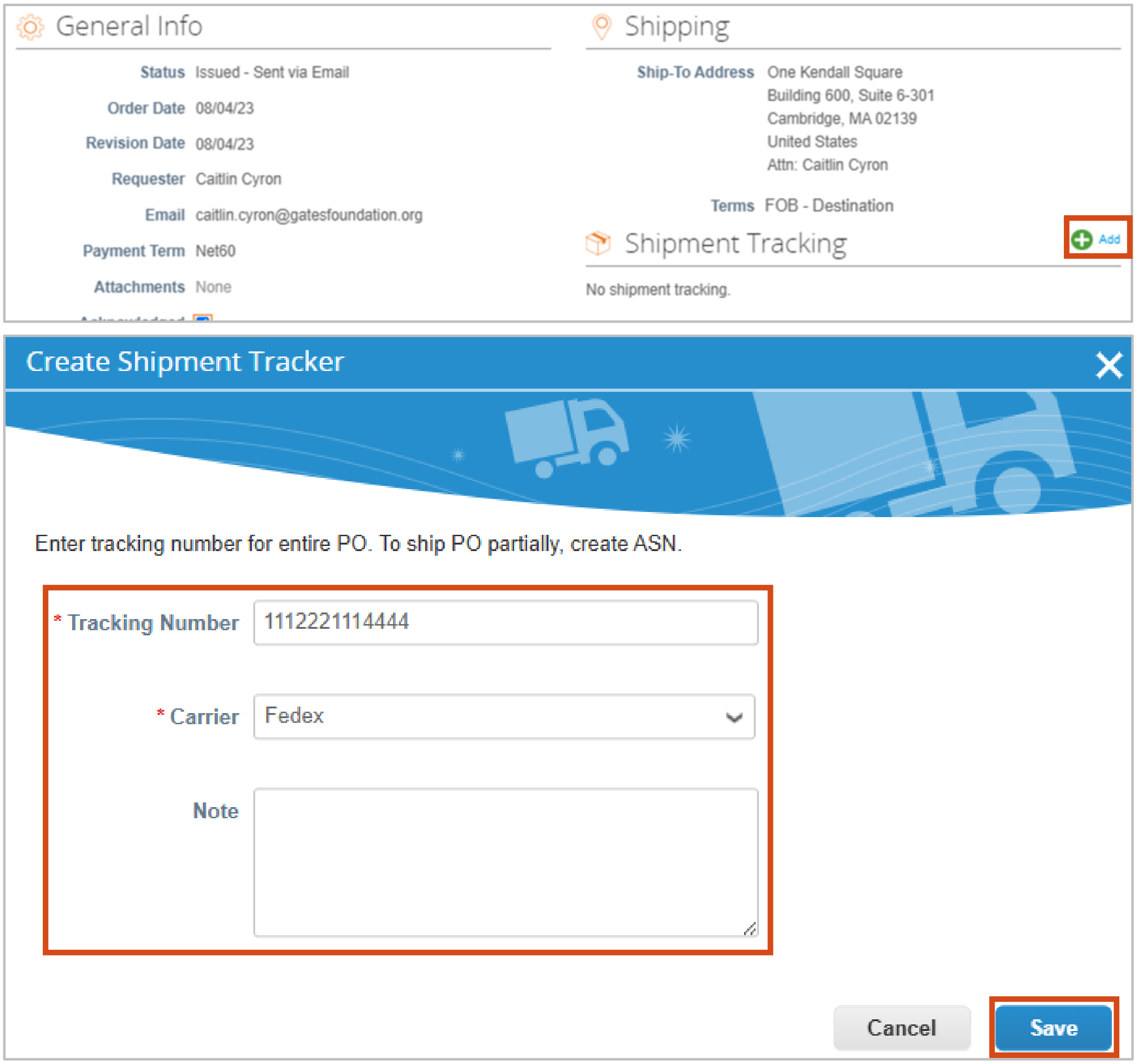
Section Overview: This section explains how to submit invoices to Atlantic Aviation from a Purchase Order received.

1.1 Receiving & Managing POs via CSP

1. Log into your CSP account at https://supplier.coupahost.com. Ensure Atlantic Aviation is selected on the **"Select Customer"** dropdown. Click **"Orders"** to view a PO.



2. Add **Shipment Tracking** by clicking **"Add."** Then, complete the following fields and click **"Save."**

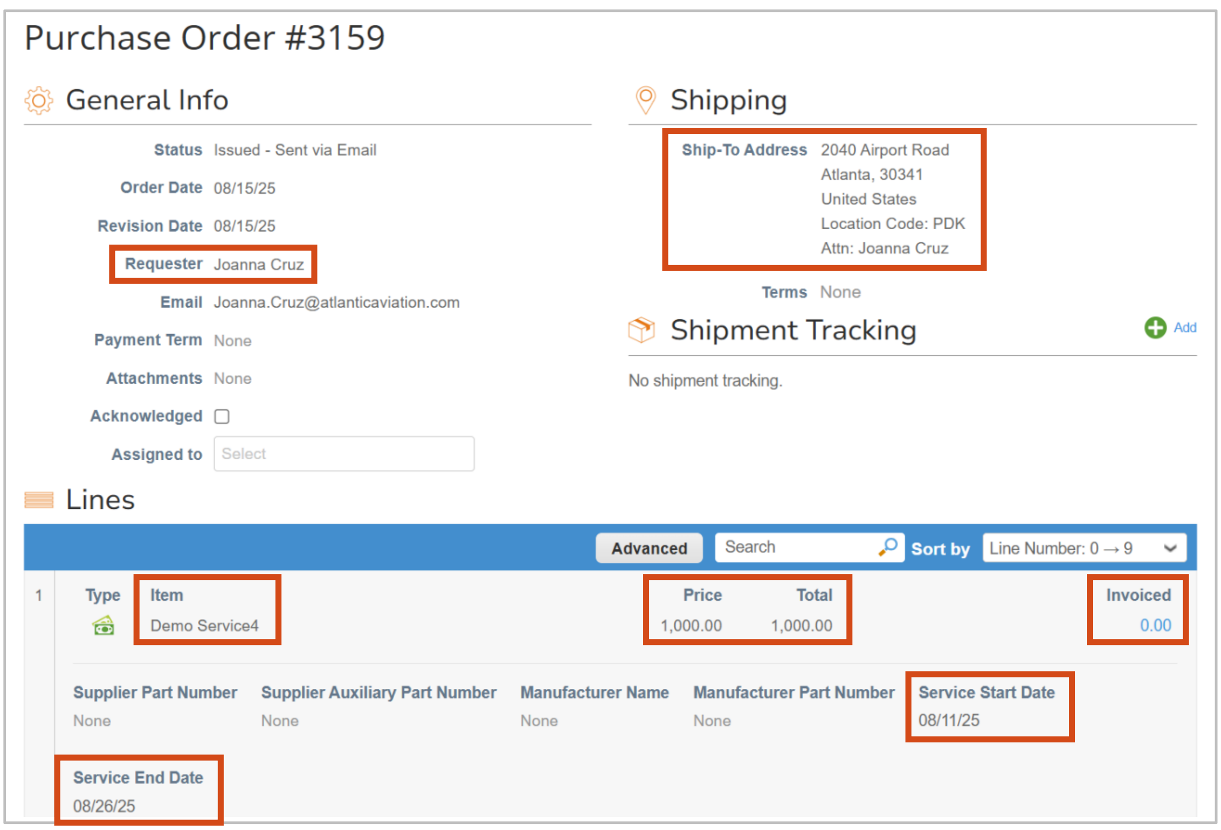


- **Tracking Number** – the tracking number provided by your carrier
- **Carrier** – select a carrier from the dropdown
- **Note** – add any notes if applicable

3. Use the comments box to add comments for Atlantic, then click **"Add Comment."**

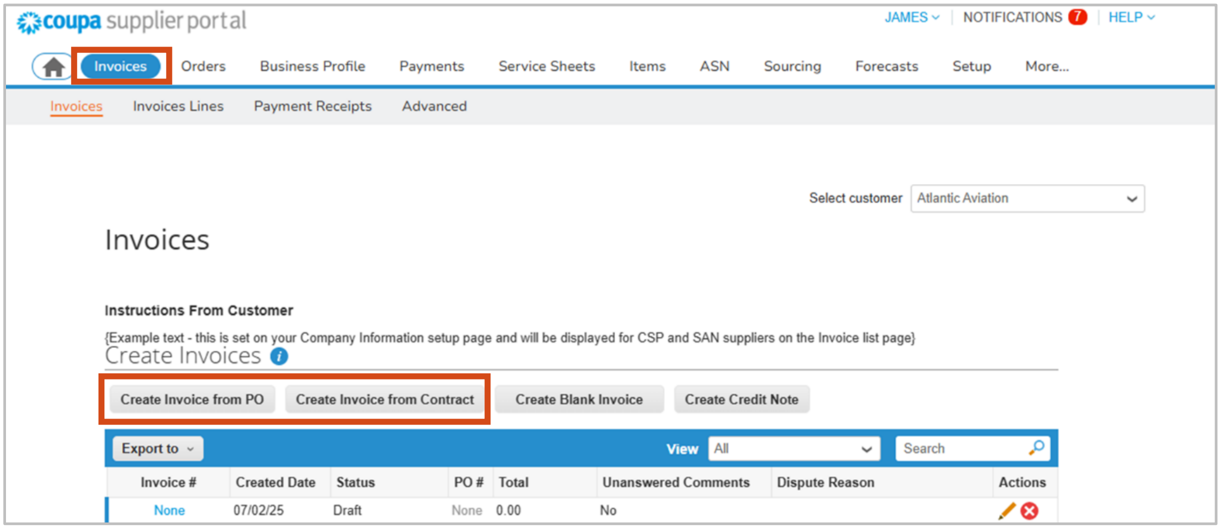
Tip: All communication with the Atlantic Aviation requester, including questions, clarifications, and updates, should be conducted through the comments section.

4. Review other key fields on the Purchase Order. Details described below.
   - **Requester** – who (from Atlantic Aviation) ordered it
   - **Ship-To Address** – where the goods or services need to go
   - **Item or Service Description(s)** – what the order consists of
   - **Quantity (Products only)** – how much was ordered
   - **Price & Total** – the cost of each line
   - **Invoiced** – the amount already invoiced for this PO
   - **Start/End Date (Services only)** – when the services are needed

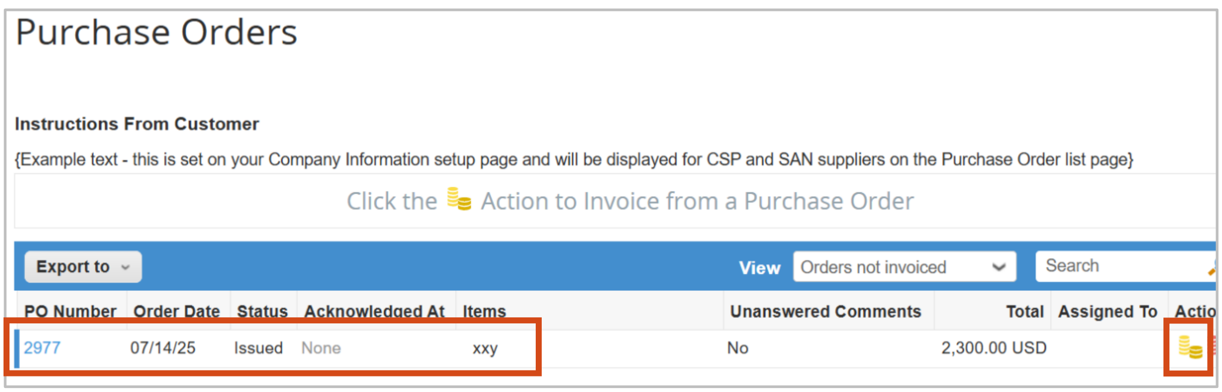


1.2 Creating an Invoice in CSP

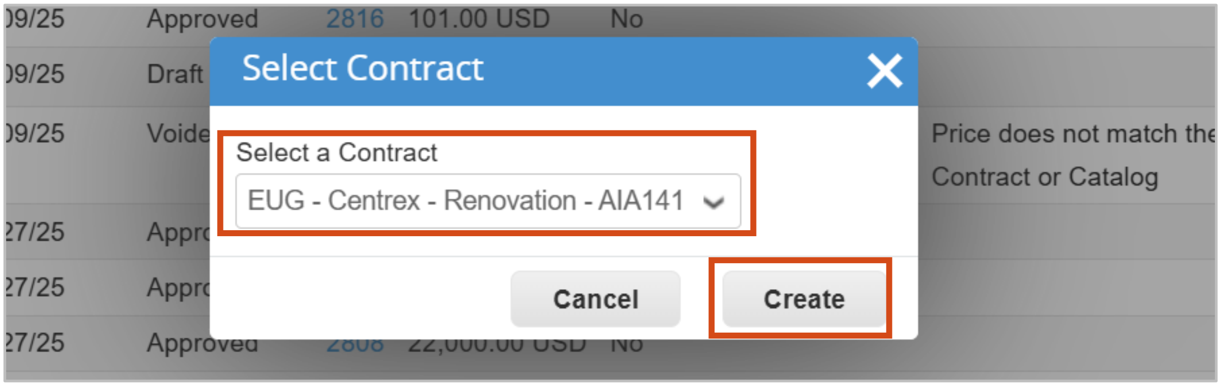
1. On the **“Invoices”** tab, you have 2 options to create an invoice:



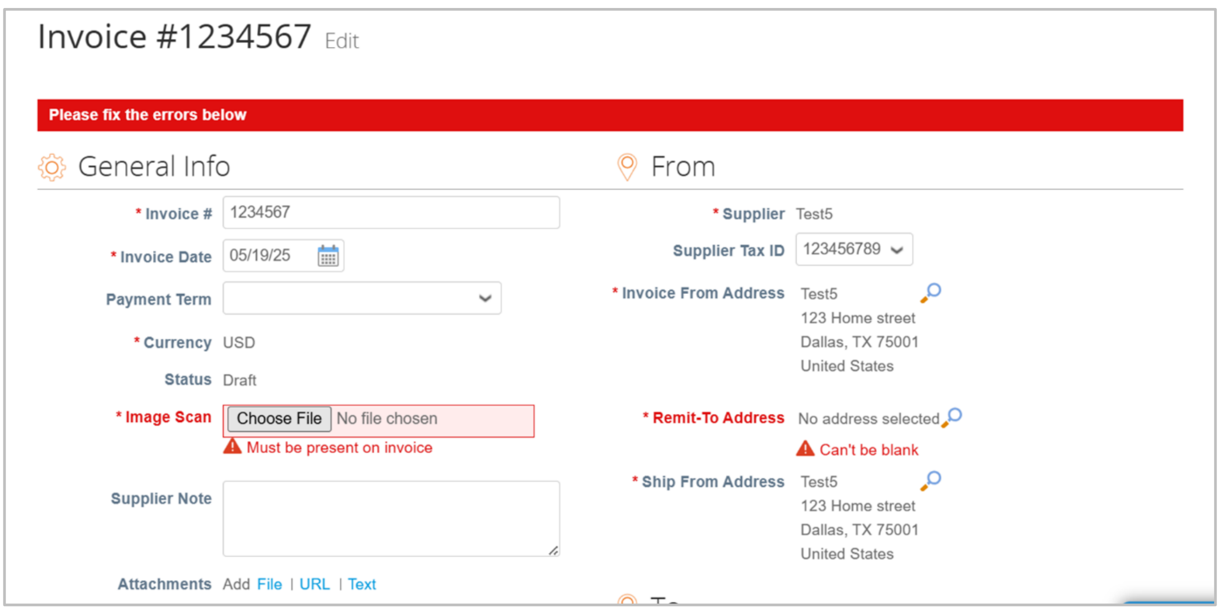
a. **“Create Invoice from PO”** – CSP will show you your **orders not invoiced**. Find the PO that you want to invoice, then click the **gold coin icon.**



b. **"Create Invoice from Contract"** – CSP will prompt you to select a current contract with Atlantic. Notify your Atlantic contact if you do not see an expected contract. Click **"Create."**



2. Some of the information may auto-populate from the step #1. Verify or complete the following fields:

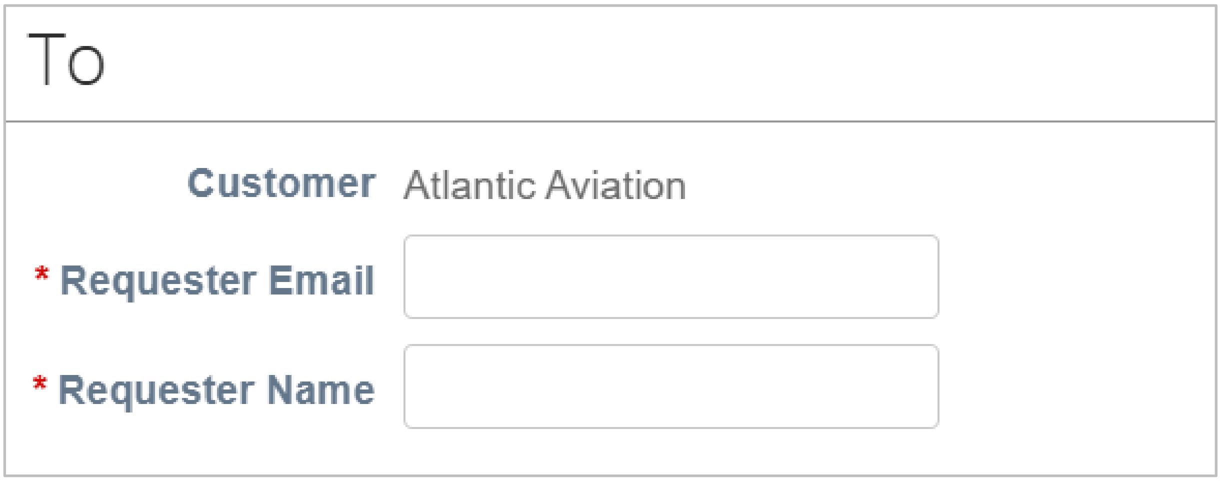


- **Invoice #** – must be unique from other invoices you have submitted, and match the number on your invoice image/pdf upload
- **Invoice Date** – cannot be pre- or post-dated
- **Image Scan** – click **"Choose File"** and upload an invoice image/pdf upload
- **Supplier Note** – any additional context for Atlantic Aviation
- **Attachments** – any additional context for Atlantic Aviation
- **Remit-To Address** – click the magnifying glass and select a remit-to address from your CSP profile if it is not already showing

Tip: To change remit-to address update information on the External Update Form by navigating to Business Profile → Information Requests → External Update Form.

Tip: Coupa will mark the **"Invoice #"** field red if your invoice # is not unique. Try a different number if this happens.

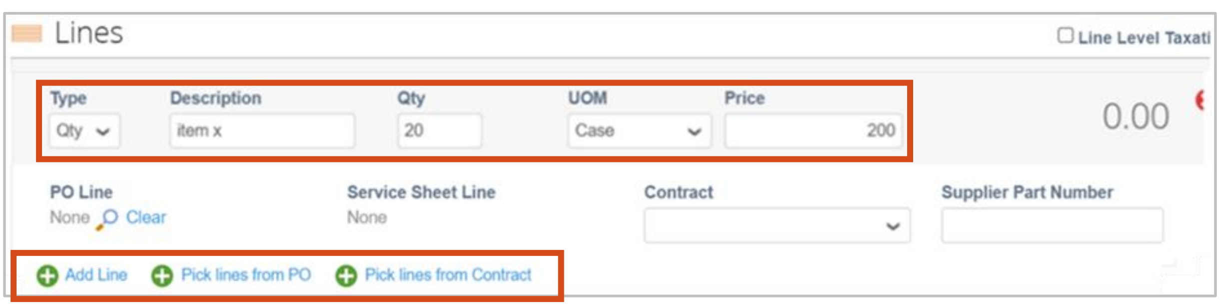
3. Add an Atlantic **requester** if prompted. This should be the **email and full name** of the person who requested the goods/services you are providing.



4. Next you will add/verify the **lines**. These are the goods and/or services you are providing.

Tip: **Partial Invoices** – you can **adjust the price/quantity for a line and submit a partial invoice** if you are providing the services/goods across several installments/shipments.

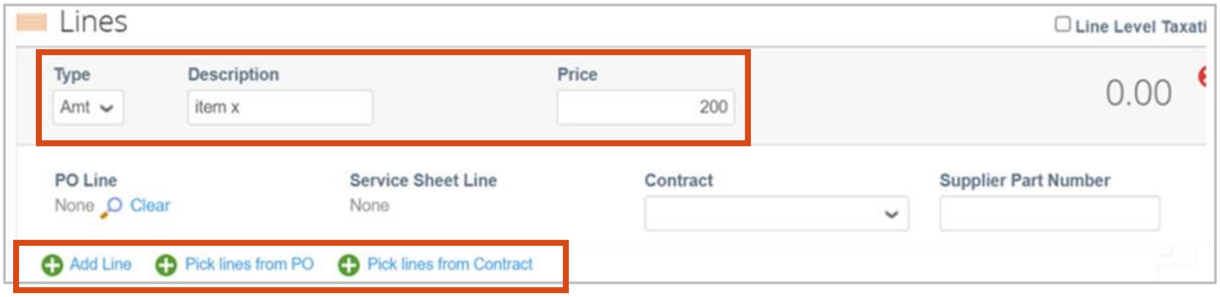
   a. For **Goods** lines, add/verify the following fields:



- **Type** – **"Qty"** for goods lines
- **Description** – the item that you are submitting an invoice for
- **Qty** – the quantity of that item
- **UOM** – the base unit for the goods, typically "Each"
- **Unit Price** – the dollar amount for 1 unit of product

Tip: Select from the bottom to add more lines.

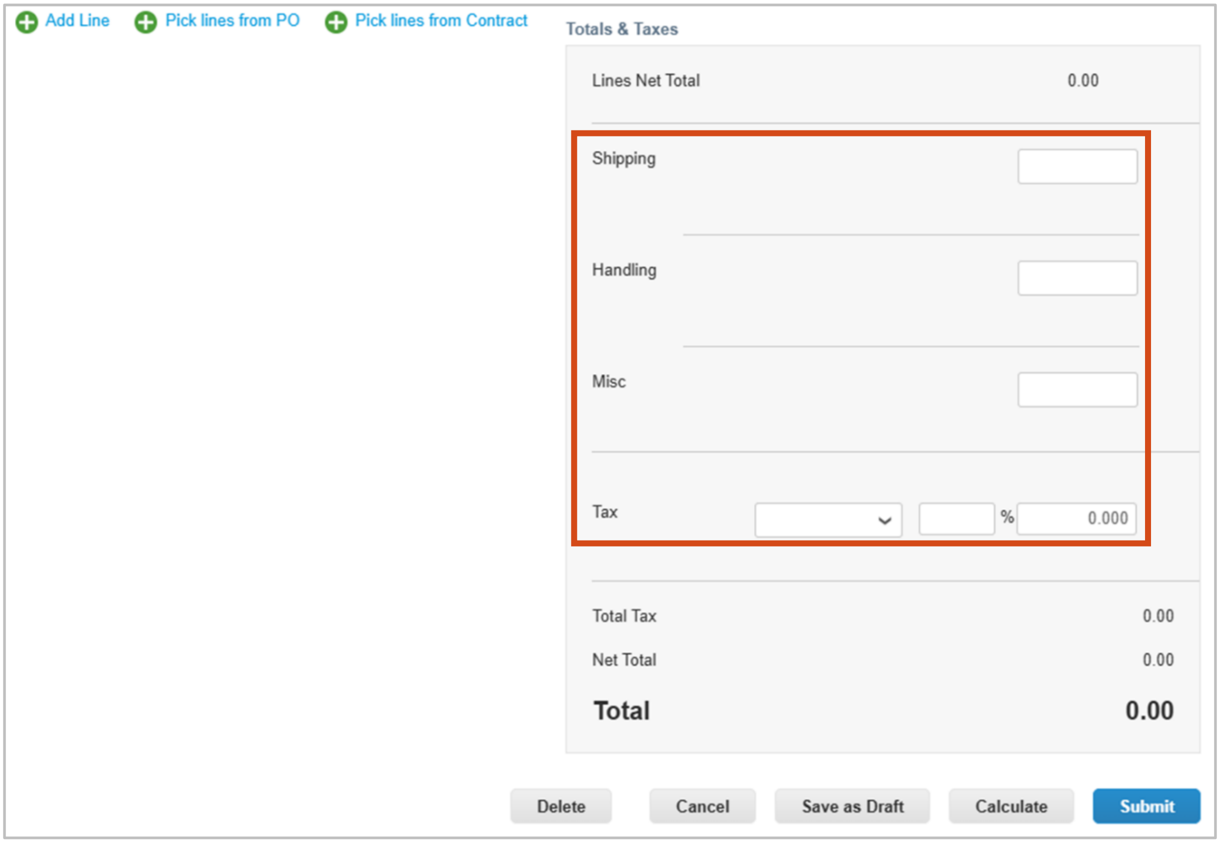
b. For **Services** lines, add/verify the following fields:



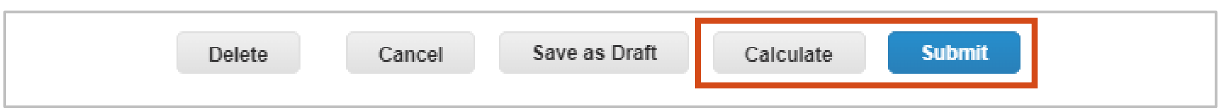
- **Type** – **"Amt"** for services lines
- **Description** – the service you are submitting an invoice for
- **Price** – the total cost of that service

Tip: Select from the bottom to add more lines.

5. Add **Shipping, Handling, Miscellaneous, and Tax charges** at the bottom of the invoice.

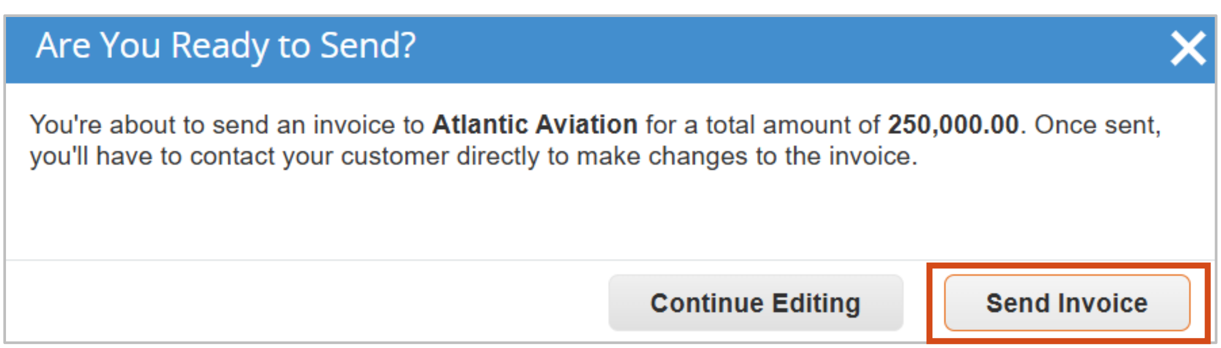


6. Click **"Calculate"** to see the invoice total and then click **"Submit."**



Tip: If you submit an invoice with information different than the original PO, there will be **an additional approval process which could delay payment.**

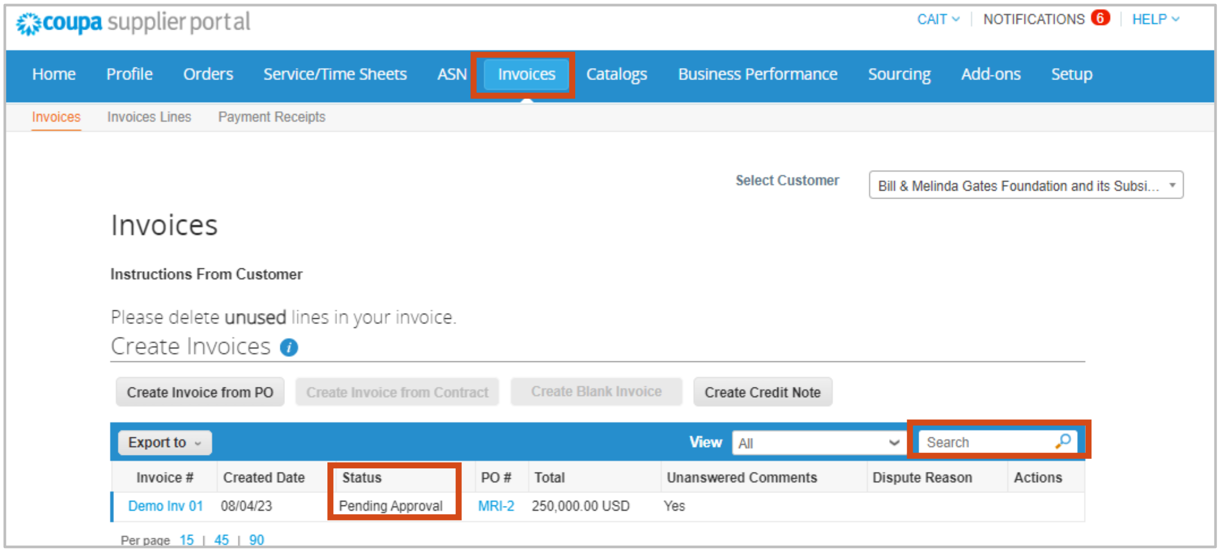
7. Click **"Send Invoice"**



Tip: After you submit the invoice, the requester will be notified to approve it.

1.3 Tracking Payment Status via CSP

1. On the **“Invoices”** tab, you can search for an invoice in the search bar and see the status in the **“Status”** column.



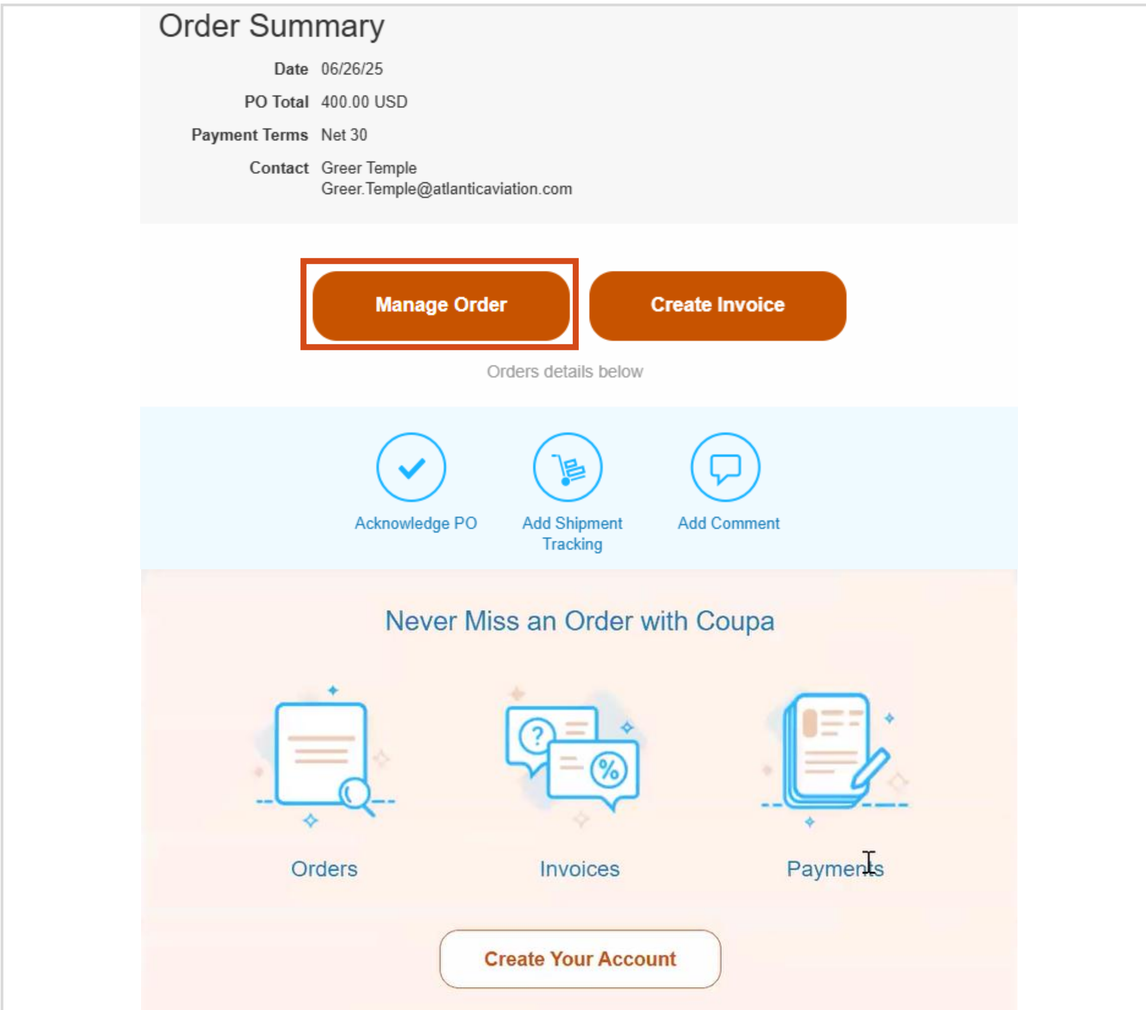
- The **“Status”** value will be one of the following:
  - ***Draft*** – you have not submitted the invoice
  - ***Pending Approval*** – you submitted the invoice and it is pending approval
  - ***Approved*** – the invoice is ready for pay by Atlantic Aviation
  - ***Disputed*** – a correction is needed, see 4. Managing Disputed Invoices
  - ***Paid*** – Atlantic has issue the payment for your invoice

2. Transacting with Atlantic via Email

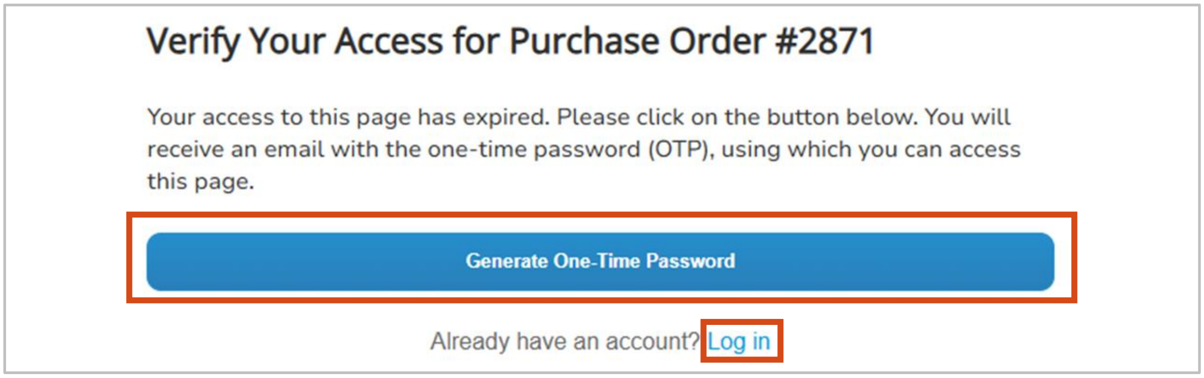
Section Overview: This section describes how to receive POs, submit invoices, and track payment status via email.

2.1 Receiving & Managing POs via Email

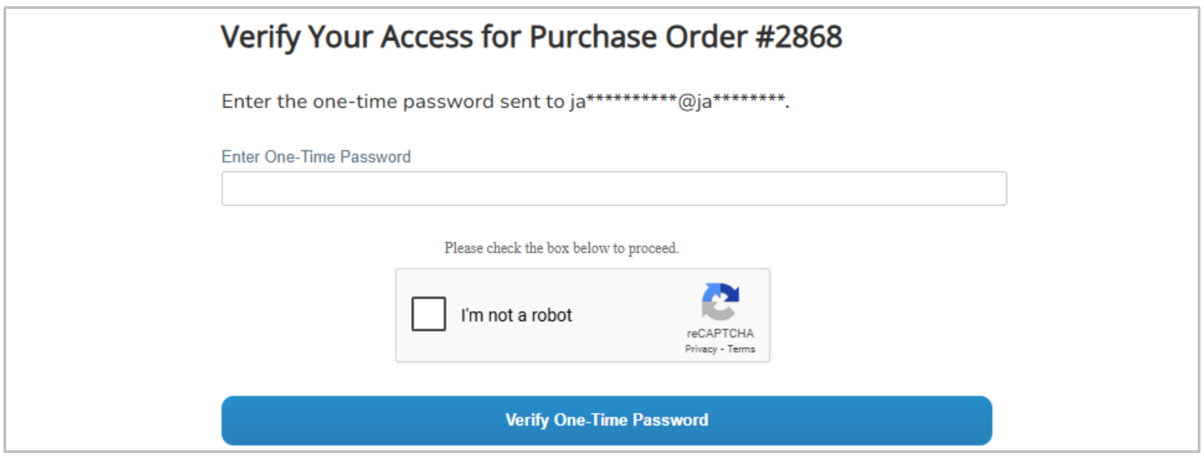
1. When Atlantic Aviation places an order for goods or services, you will receive an email from do_not_reply@atlanticaviation.coupahost.com with the subject line **"New Purchase Order from Atlantic Aviation."** From this email you can view and manage the order by clicking **"Manage Order."**



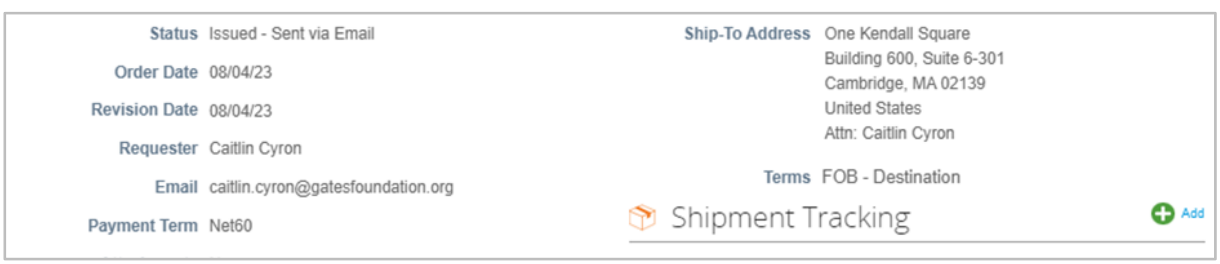
Tip: When you click on any links in the email, you will be prompted to click **"Generate One-Time Password"** to get a One-Time Password **or click "Log in" if you have a CSP account.**

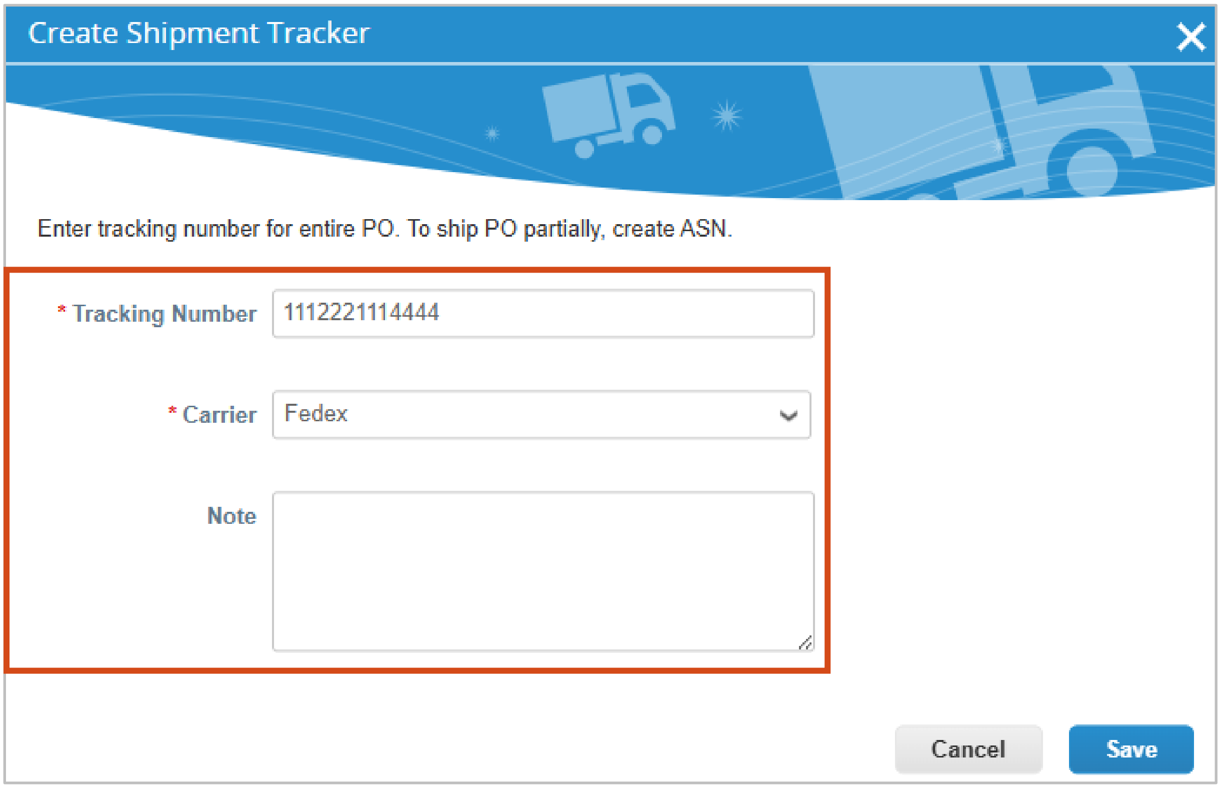


Tip: If you already set up a One-Time Password within the last 24 hours, your screen will look like this. Find that email and enter the password on this screen.



5. Add **Shipment Tracking** by clicking **"Add."** Then, complete the following fields and click **"Save."**

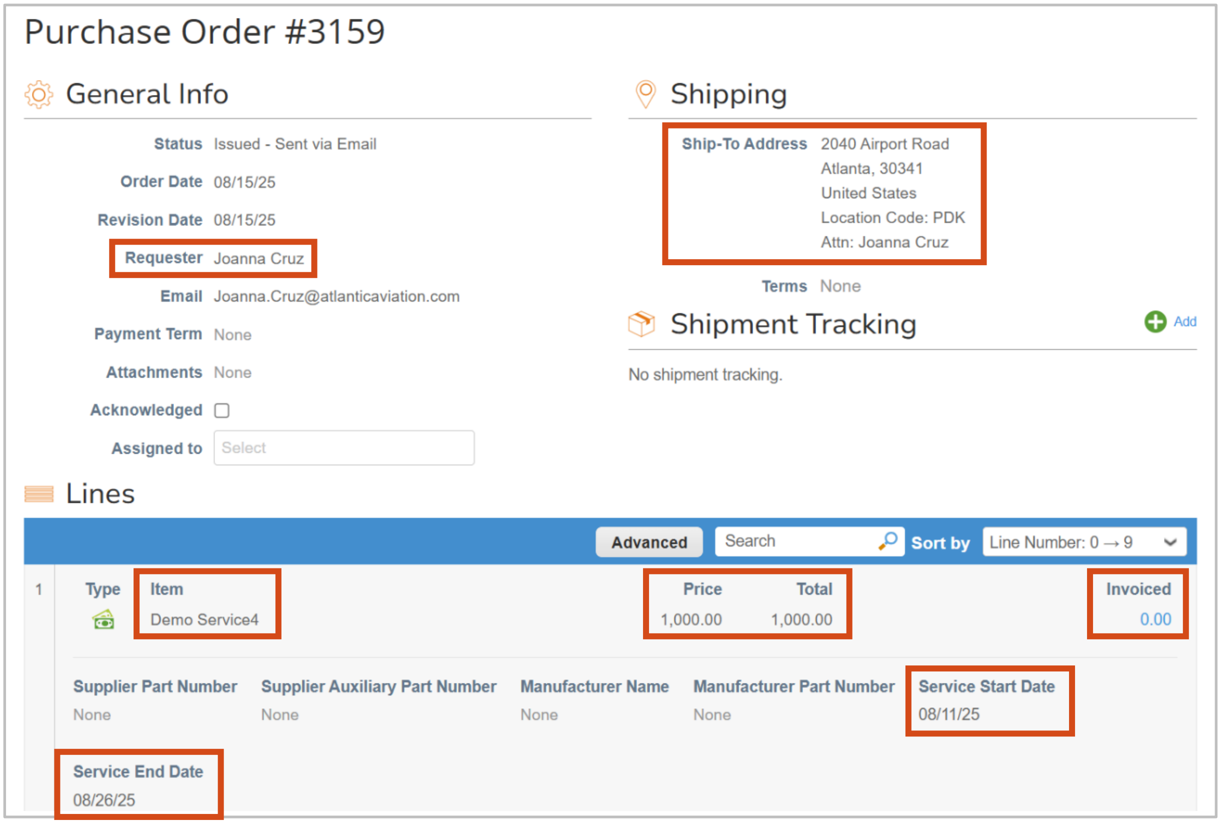




- **Tracking Number** – the tracking number provided by your carrier
- **Carrier** – select a carrier from the dropdown
- **Note** – add any notes if applicable

6. Use the comments box to add comments for Atlantic, then click **"Add Comment."**

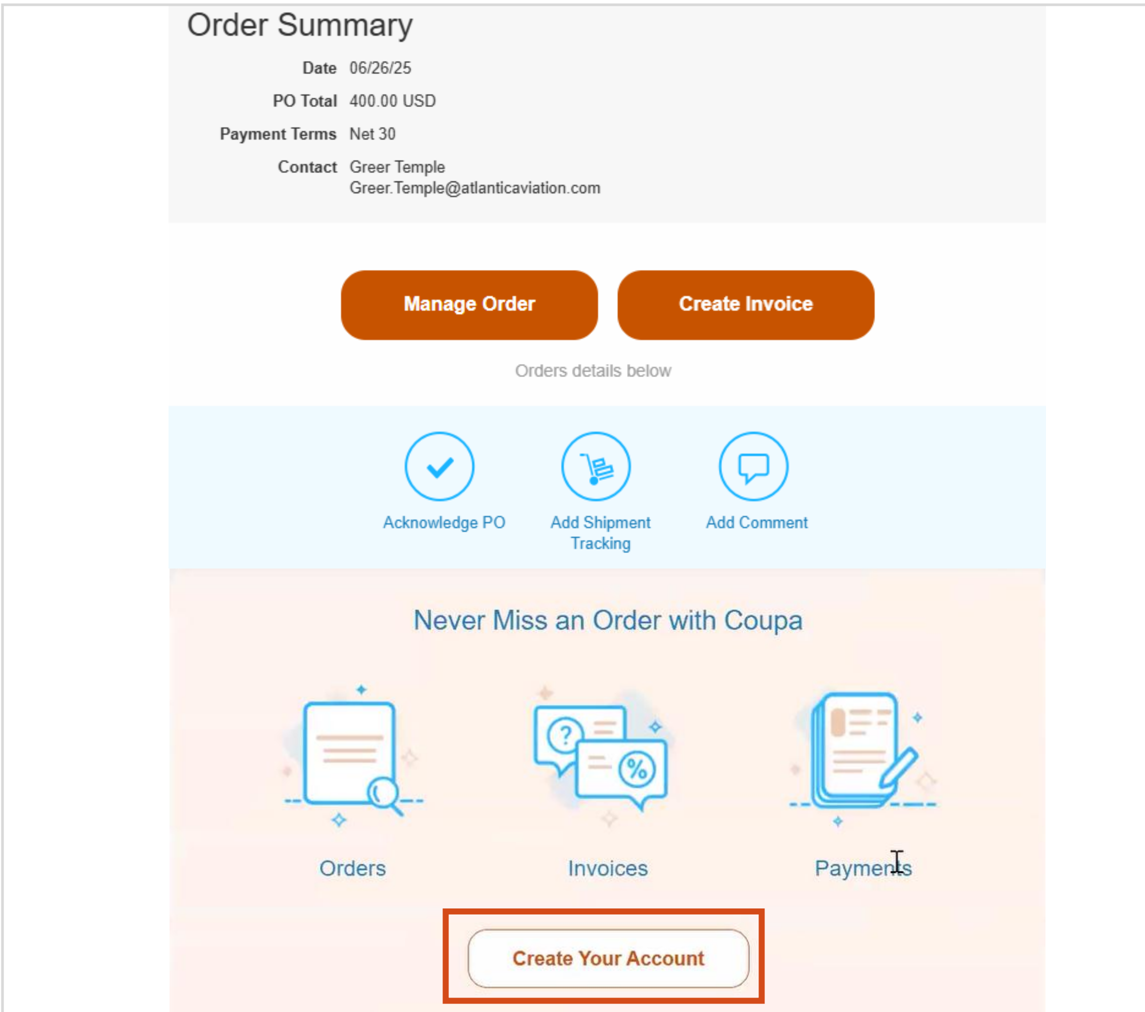
7. Review other key fields on the Purchase Order. Details described below.



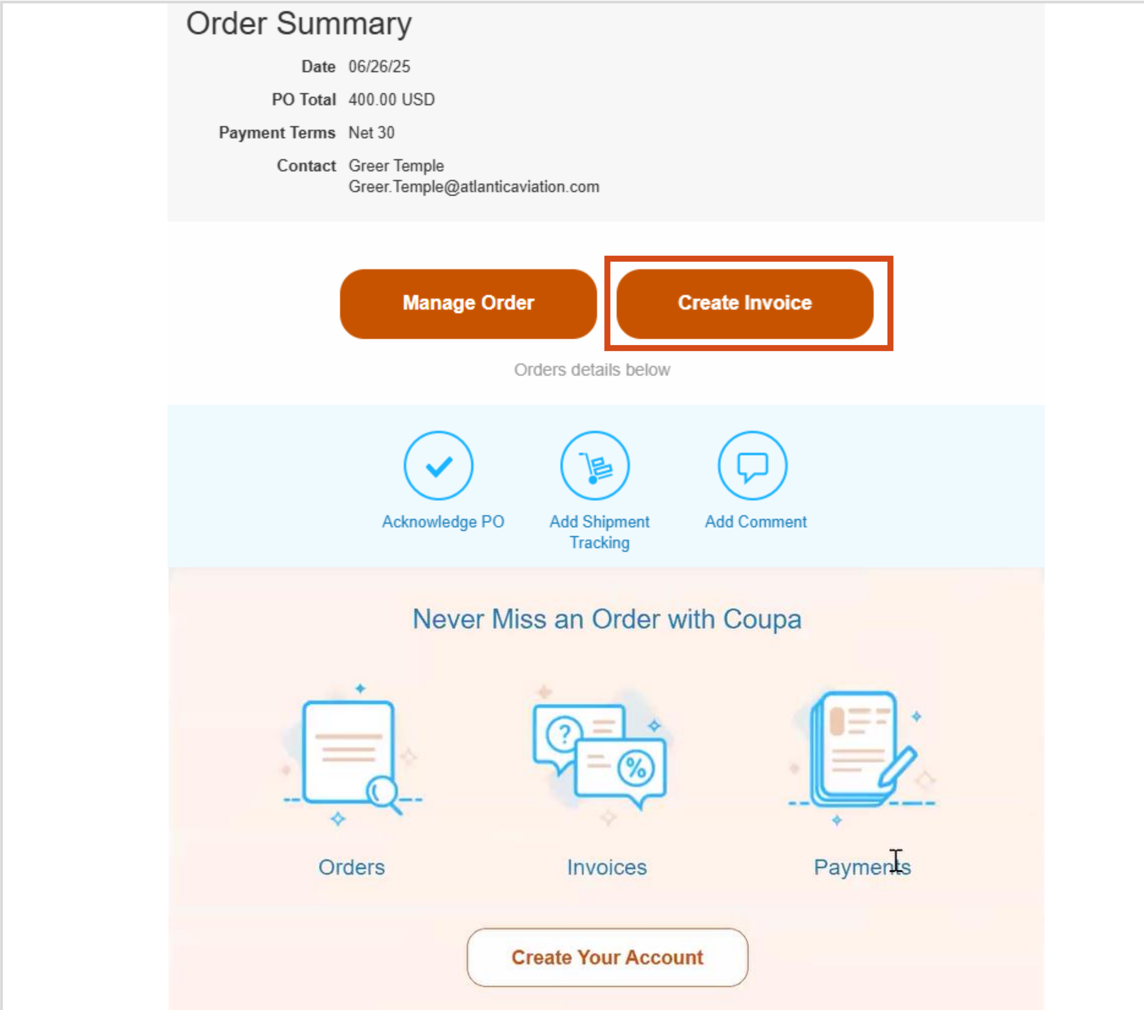
- **Requester** – who (from Atlantic Aviation) ordered it
- **Ship-To Address** – where the goods or services need to go
- **Item or Service Description(s)** – what the order consists of
- **Quantity (Products only)** – how much was ordered
- **Price & Total** – the cost of each line
- **Invoiced** – the amount already invoiced for this PO
- **Start/End Date (Services only)** – when the services are needed

2.2 Creating an Invoice via Email

1. **It is highly recommended that you set up a CSP account to simplify the invoice & payment process. Click "Create Your Account"** to get set up.

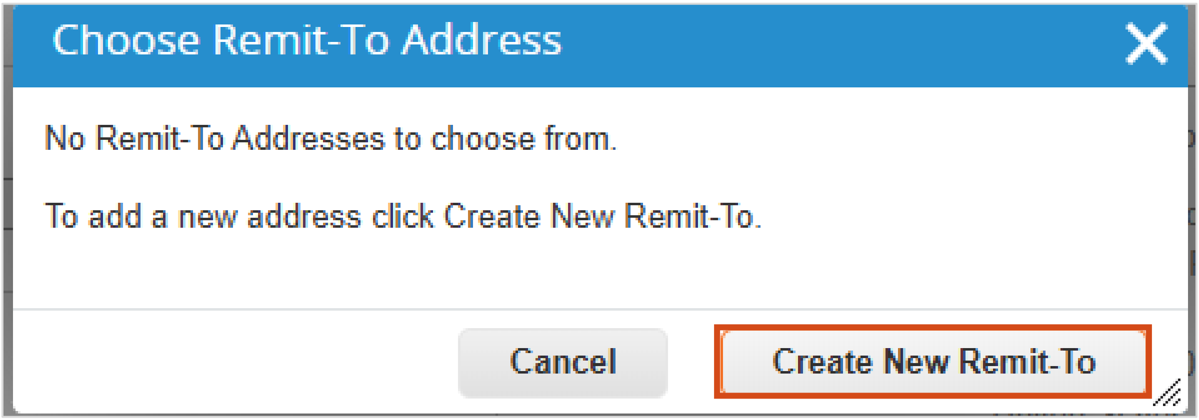


2. If you choose not to sign up for the Coup Supplier Portal, you will be required to complete additional steps. Click **"Create Invoice".**

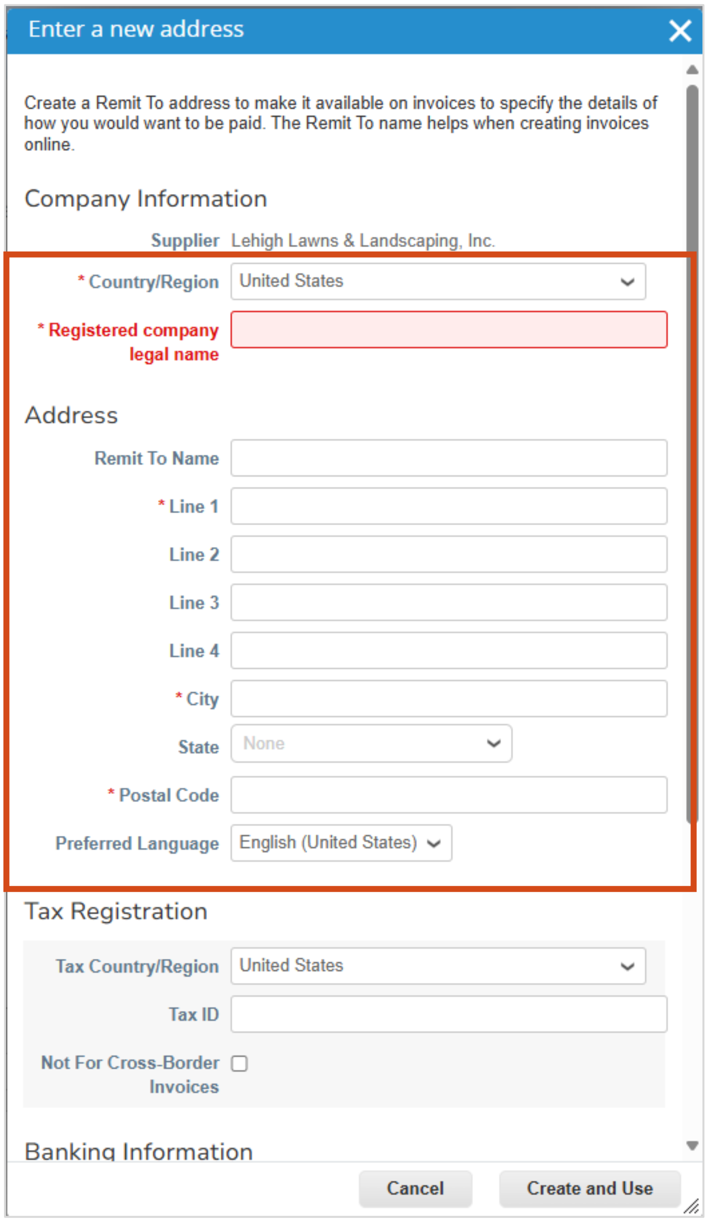


Tip: You may have to follow the One-Time Passcode process explained in 2.1 Receiving & Managing POs via Email.

3. Coupa will prompt to create a remit to address before the invoice can be submitted. Click **"Create New Remit-To".**

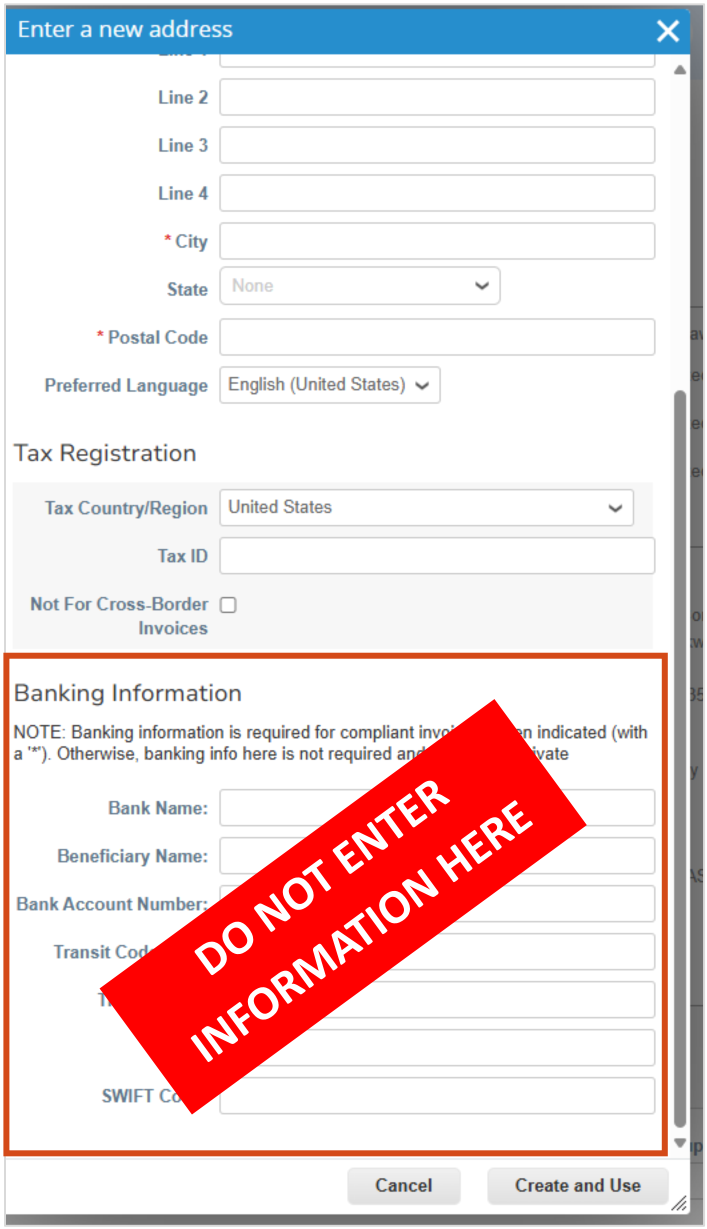


4. Complete all required fields, then click **"Create and Use".**

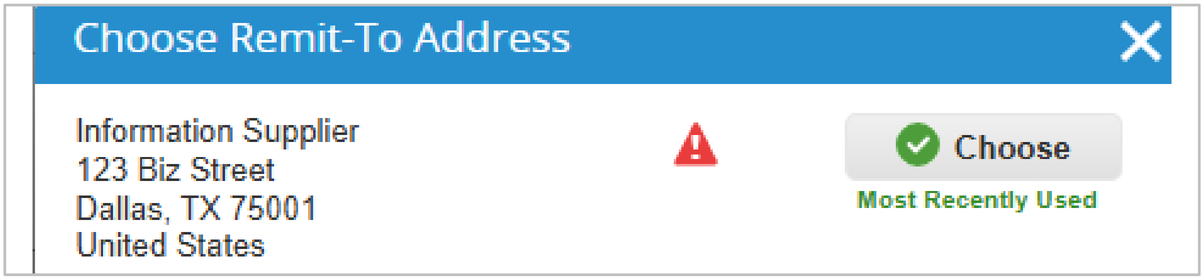


- **Country/Region**
- **Registered Company Legal Name**
- **Address** – Line 1, City, Postal Code

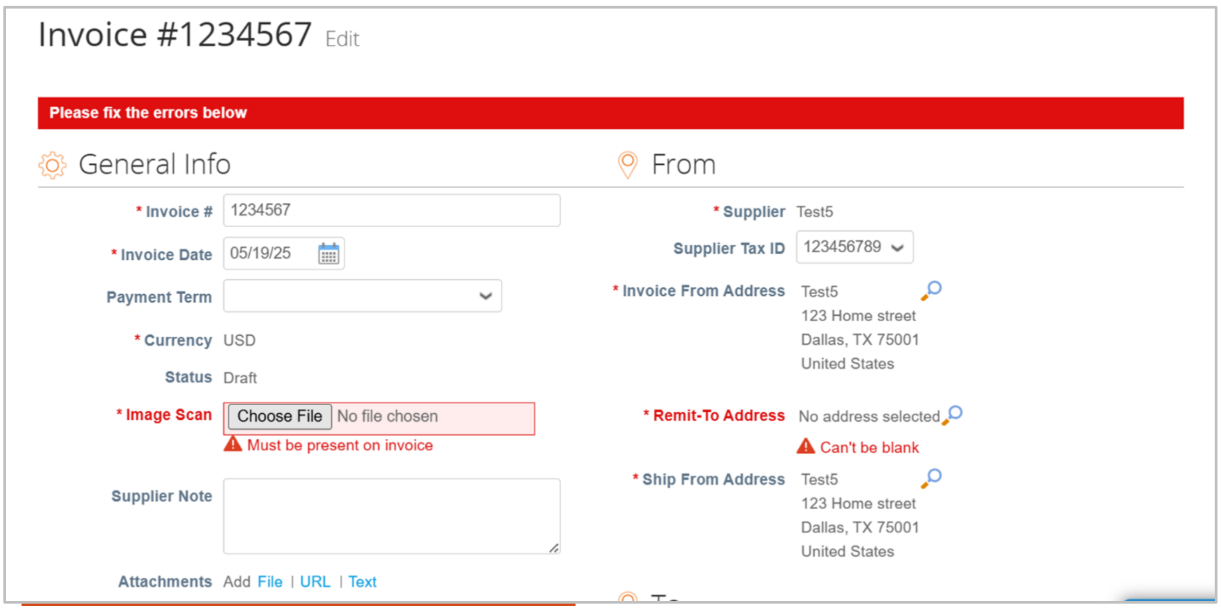
Tip: Do not fill out "Banking Information" – any information entered in the **"Banking Information"** section will **not be sent to Atlantic Aviation**. To update your payment details, please **create a Coupa Supplier Portal account and submit any changes** to your business or payment information through the **External Update Form**.



Tip: For future transactions, Coupa may prompt you to choose a remit-to address. Click **“Choose.”**



5. Verify/complete the following fields:



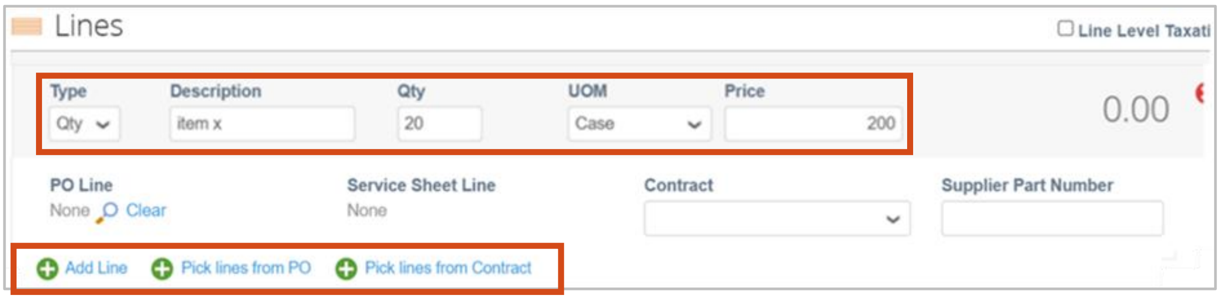
- **Invoice #** – must be unique from other invoices you have submitted, and match the number on your invoice image/pdf upload
- **Invoice Date** – cannot be pre- or post-dated
- **Image Scan** – click **“Choose File”** and upload an invoice image/pdf upload
- **Supplier Note** – any additional context for Atlantic Aviation
- **Attachments** – any additional context for Atlantic Aviation
- **Remit-To Address** – click the magnifying glass and select a remit-to address if it is not already showing

Tip: Coupa will mark the **“Invoice #”** field red if your invoice # is not unique. Try a different number if this happens.

6. Next you will add/verify the **lines**. These are the goods and/or services you are providing.

Tip: **Partial Invoices** – you can **adjust the price/quantity for a line and submit a partial invoice** if you are providing the services/goods across several installments/shipments.

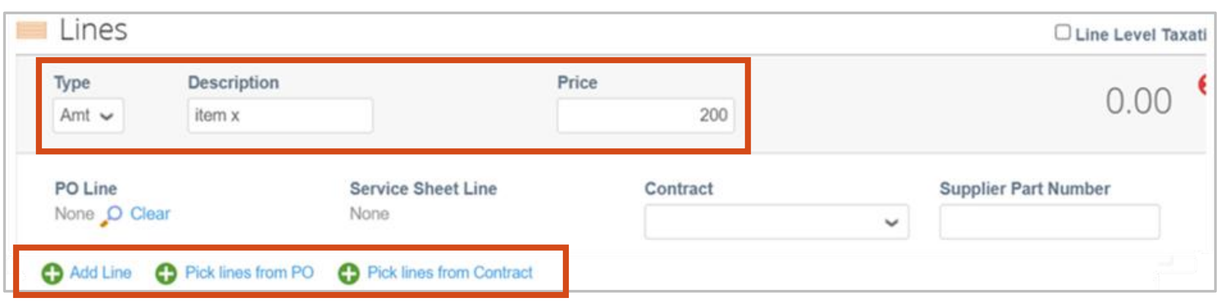
- For **Goods** lines, add/verify the following fields:



  - **Type** – **"Qty"** for goods lines
  - **Description** – the item that you are submitting an invoice for
  - **Qty** – the quantity of that item
  - **UOM** – the base unit for the goods, typically "Each"
  - **Unit Price** – the dollar amount for 1 unit of product

Tip: Select from the bottom to add more lines.

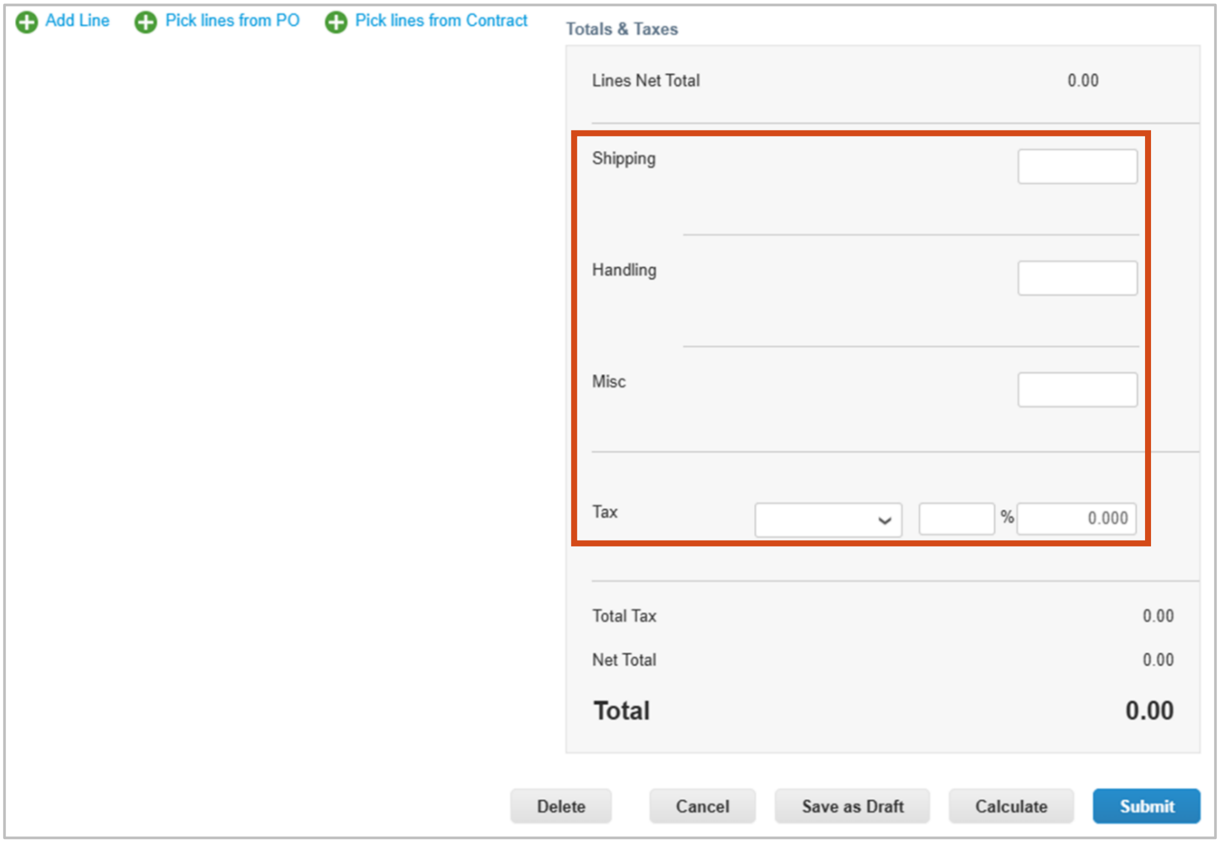
- For **Services** lines, add/verify the following fields:



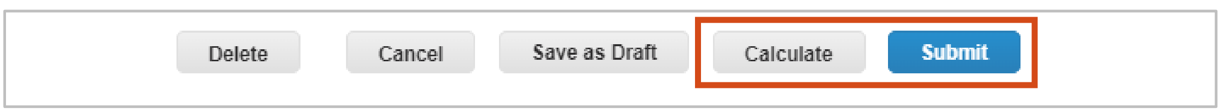
  - **Type** – **"Amt"** for services lines
  - **Description** – the service you are submitting an invoice for
  - **Price** – the total cost of that service

Tip: Select from the bottom to add more lines.

7. Add **Shipping, Handling, Miscellaneous, and Tax charges** at the bottom of the invoice.

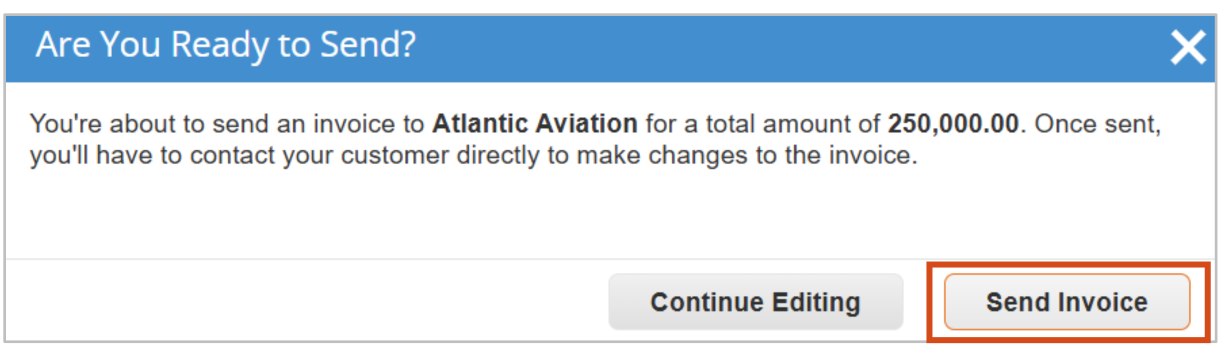


8. Click **"Calculate"** to see the invoice total and then click **"Submit."**



Tip: If you submit an invoice with information different than the original PO, there will be **an additional approval process which could delay payment.**

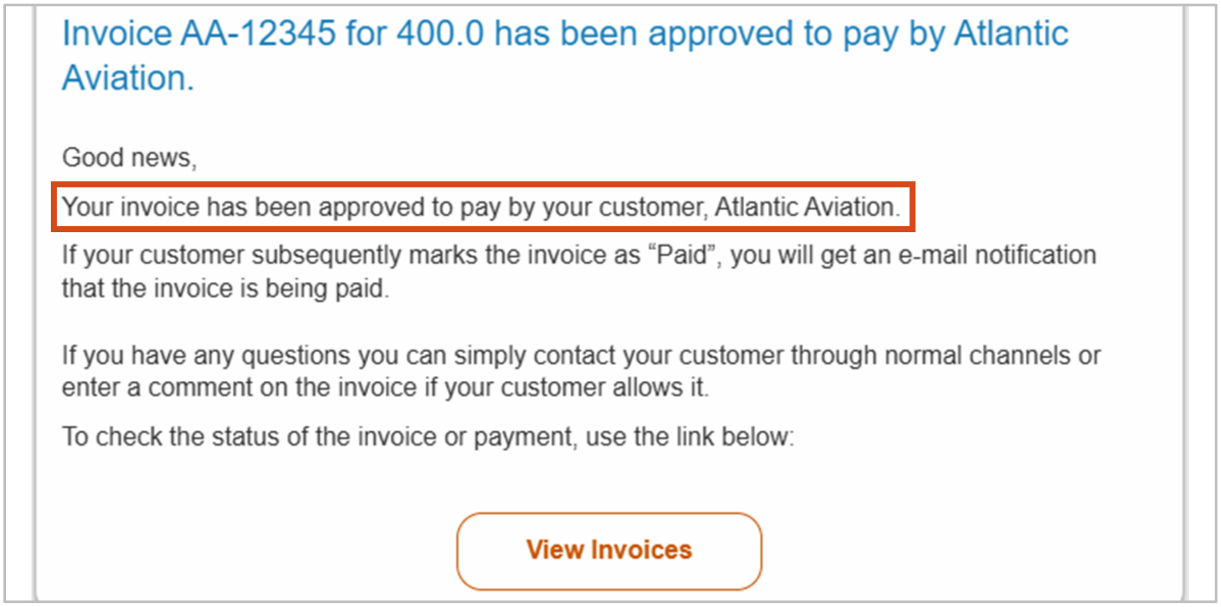
9. Click **"Send Invoice"**



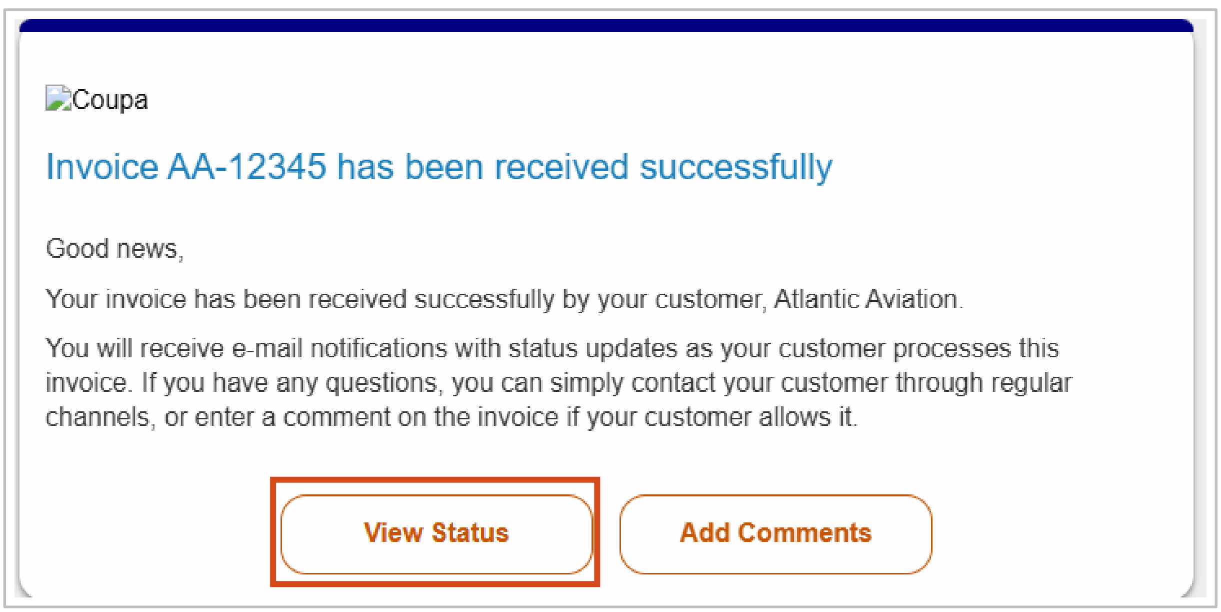
10. You will receive a confirmation email that your invoice has been received by Atlantic. **Bookmark this email**, so that you can come back to track the invoice status.

2.3 Tracking Payment Status via Email

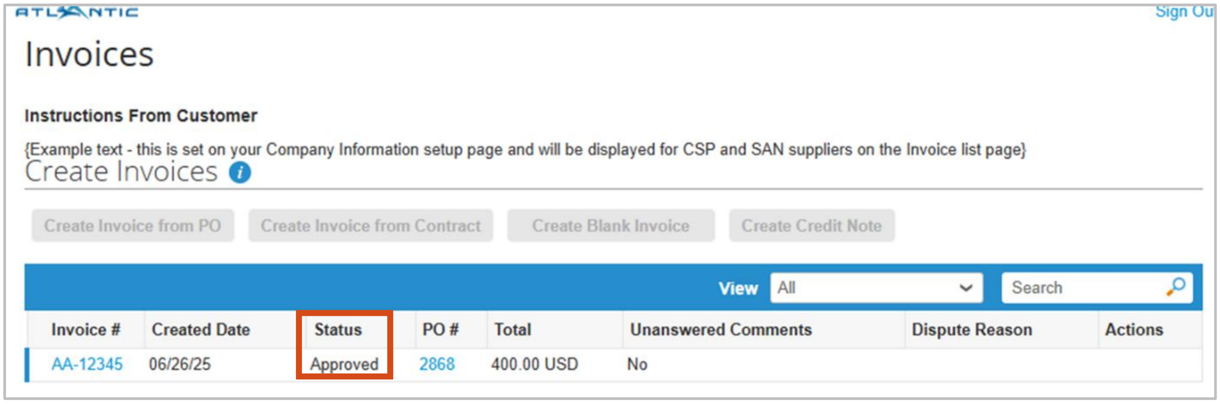
1. Coupa will automatically notify you when your invoice is **“Approved”** and **“Paid.”**



2. If at any time you need to check the status manually, navigate back to the invoice confirmation email and click **“View Status.”**



3. The link will open a new page with the invoice and status



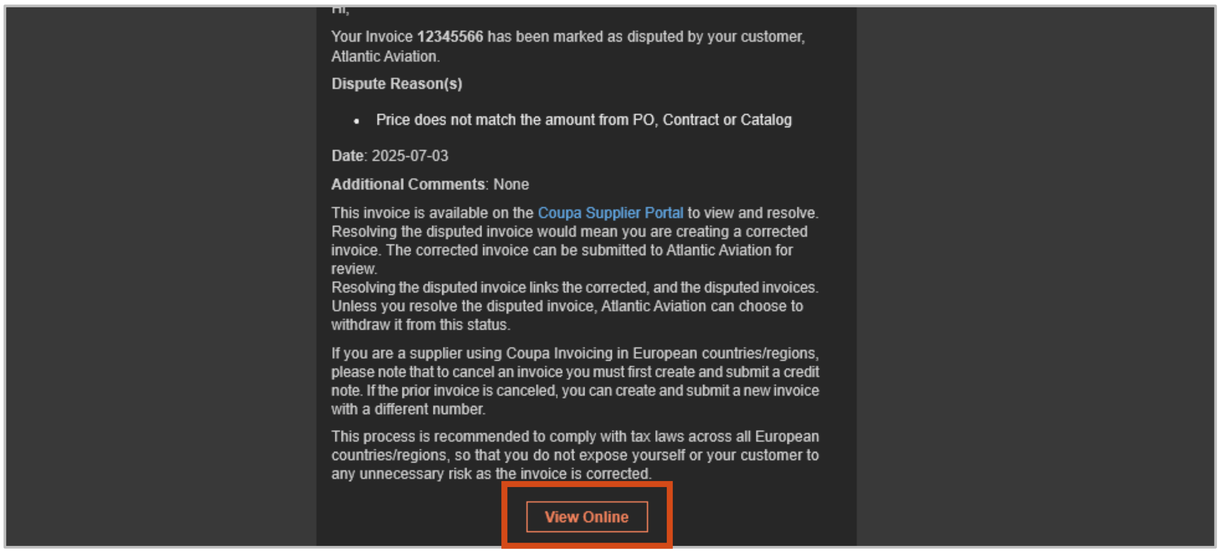
- The **"Status"** value will be one of the following:
  - ***Draft*** – you have not submitted the invoice
  - ***Pending Approval*** – you submitted the invoice and it is pending approval
  - ***Approved*** – the invoice is ready for pay by Atlantic Aviation
  - ***Disputed*** – a correction is needed, follow Atlantic's comments
  - ***Paid*** – Atlantic has issue the payment for your invoice

3. Managing Disputed Invoices

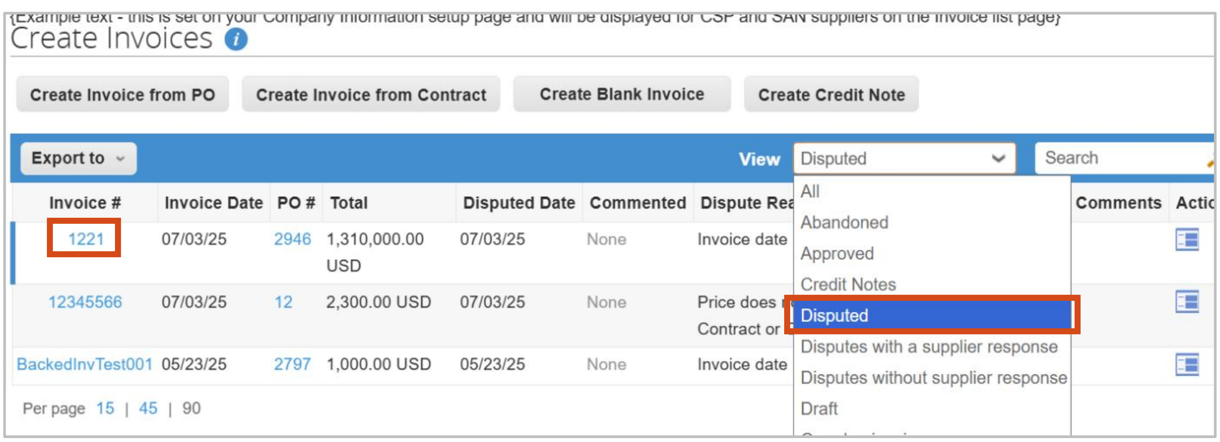
Section Overview: This section shows how to resolve invoices that Atlantic has disputed.

Tip: Atlantic Aviation can **"Dispute" invoices if they have incorrect information**. The dispute can be resolved by **correcting and resubmitting the invoice or voiding it entirely.**

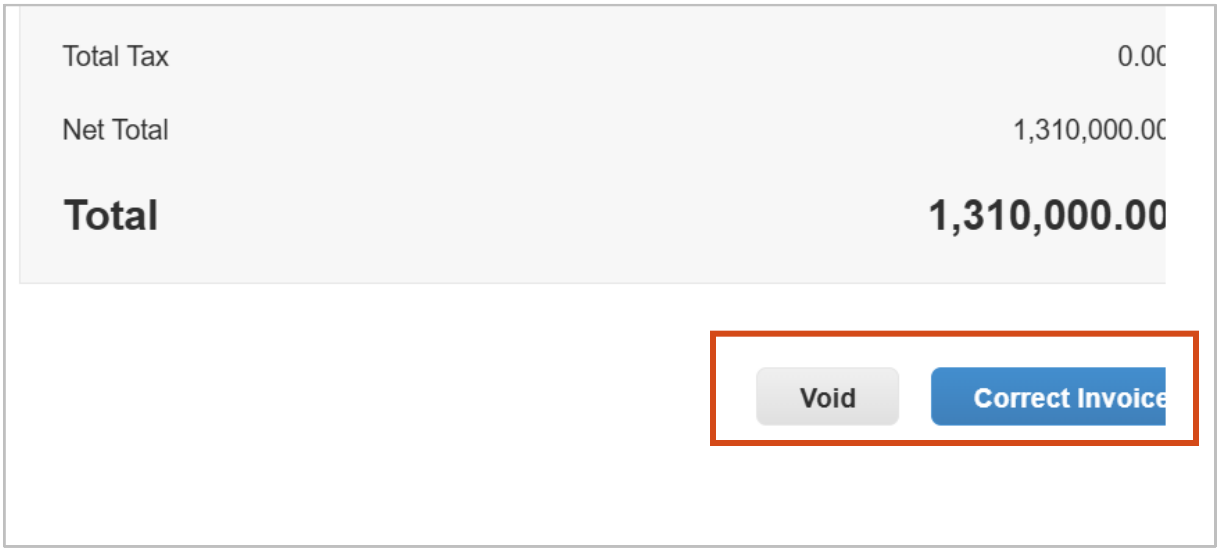
1. You will receive an email notification when the invoice is disputed. Click **"View Online."**



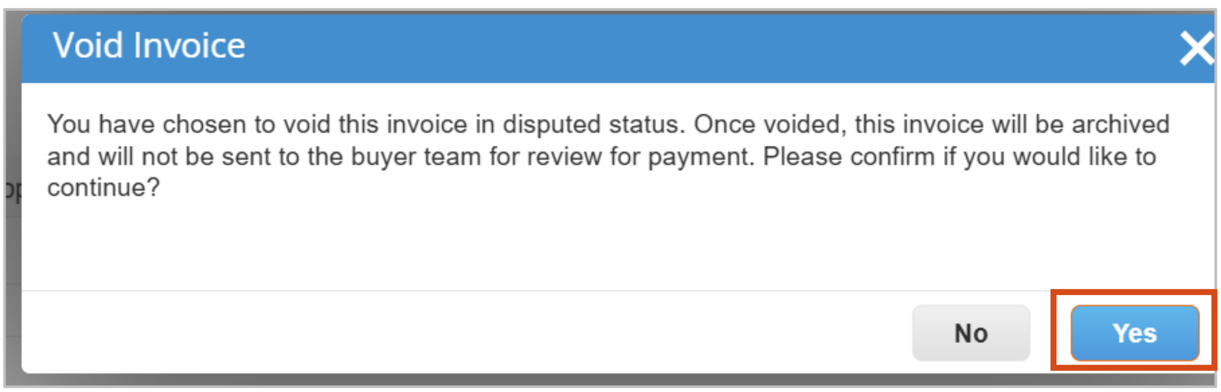
2. Change the invoice view to **"Disputed"** to see all disputed invoice, then click on an invoice.



3. Scroll to the bottom of the invoice and select one of the following options:



   a. **"Correct Invoice"** to edit using steps in 1.2 Creating an Invoice in CSP and resubmit
   b. **"Void"** and click **"Yes"** to cancel the invoice completely. You will not be paid for this invoice.



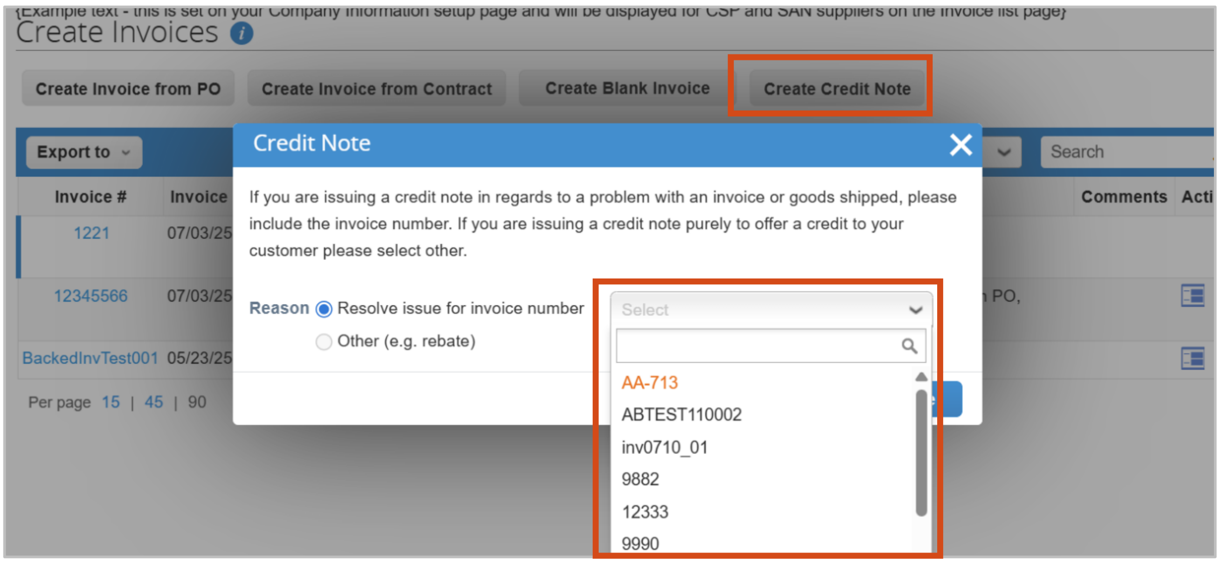
4. Submitting Credit Memos

Section Overview: This section describes how to submit credit memos in Coupa.

Tip: Credit memos should be used to **cancel out an approved or pending invoice.**

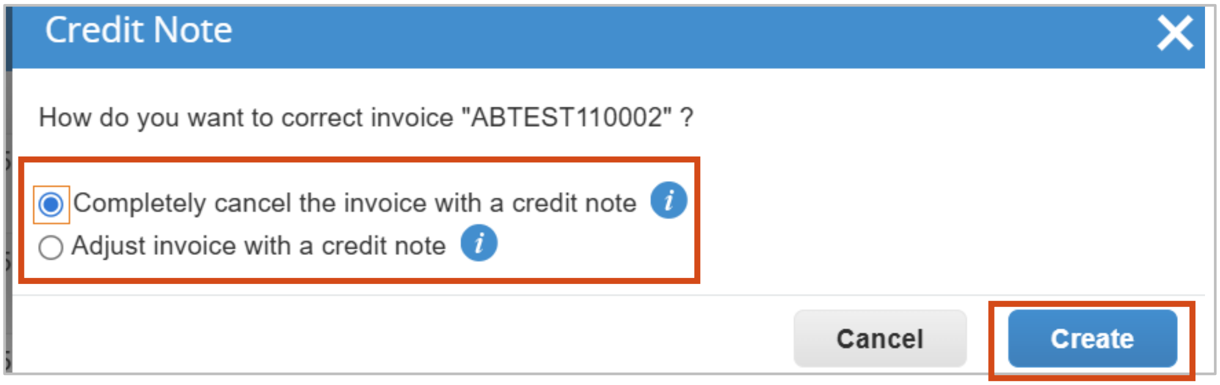
Tip: Create a credit memo using the <u>same method you used to create the invoice.</u> (e.g., if invoice was created/sent using CSP, create credit memo in CSP)

1. On the **"Invoices"** tab, click **"Create Credit Note,"** select a **pending or approved invoice,** then click **"Create."**

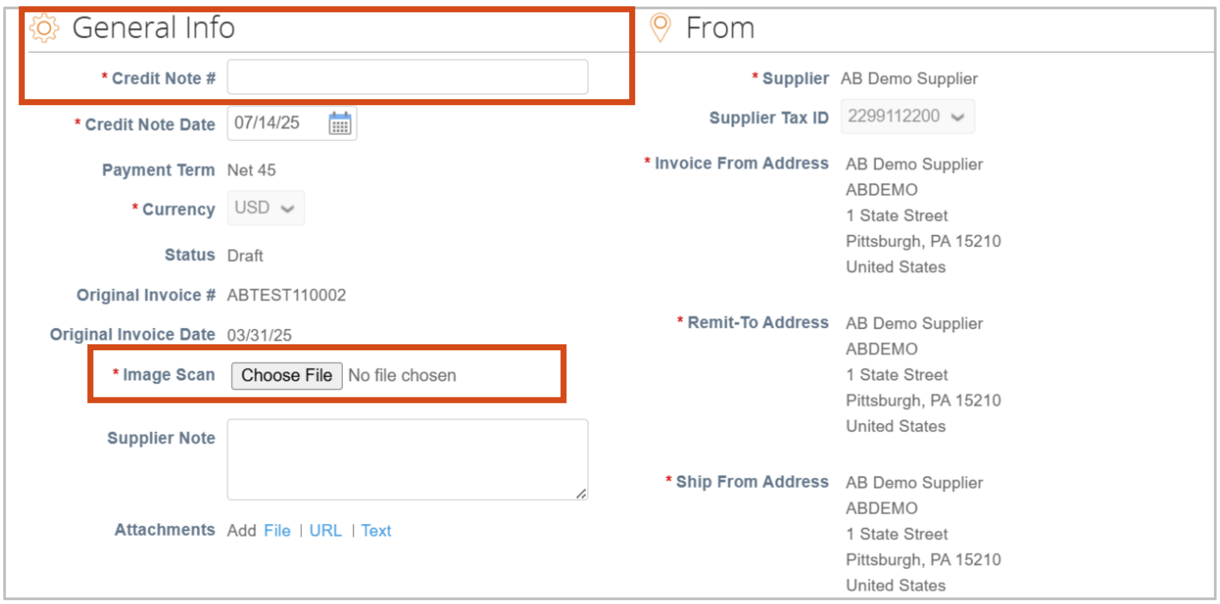


Tip: Select **"Other"** if you are submitting a rebate.

2. Select **"Completely cancel the invoice with a credit note"** if you want to cancel completely, or **"Adjust invoice with a credit note"** if you are correcting part of the invoice. Click **"Create."**

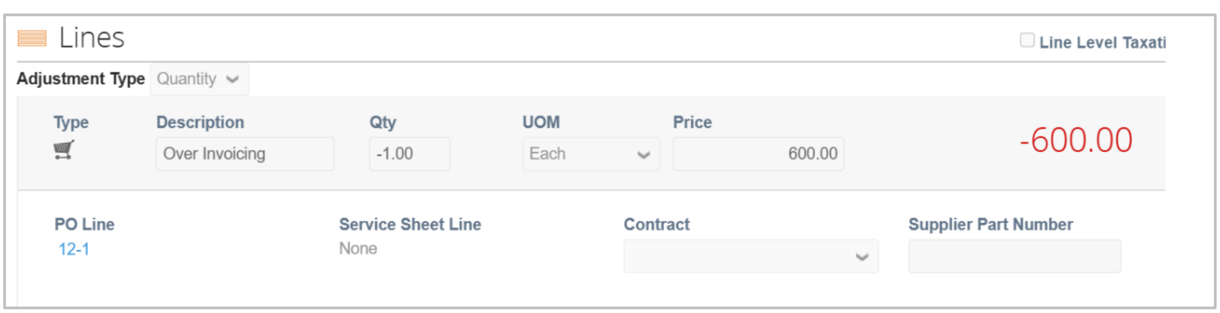


3. Add the following information to the credit note:

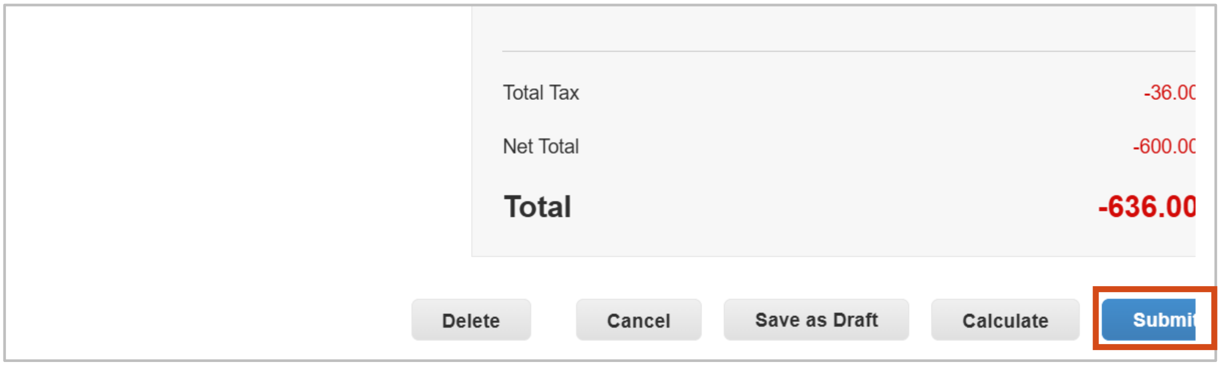


- **Credit Note #** - unique ID
- **Image Scan** – upload an image of the credit note

4. Verify the credit amount



5. Click **“Submit”** and **“Send Credit Note.”**



Tip: The credit note will go through the same approval process as the original invoice.