

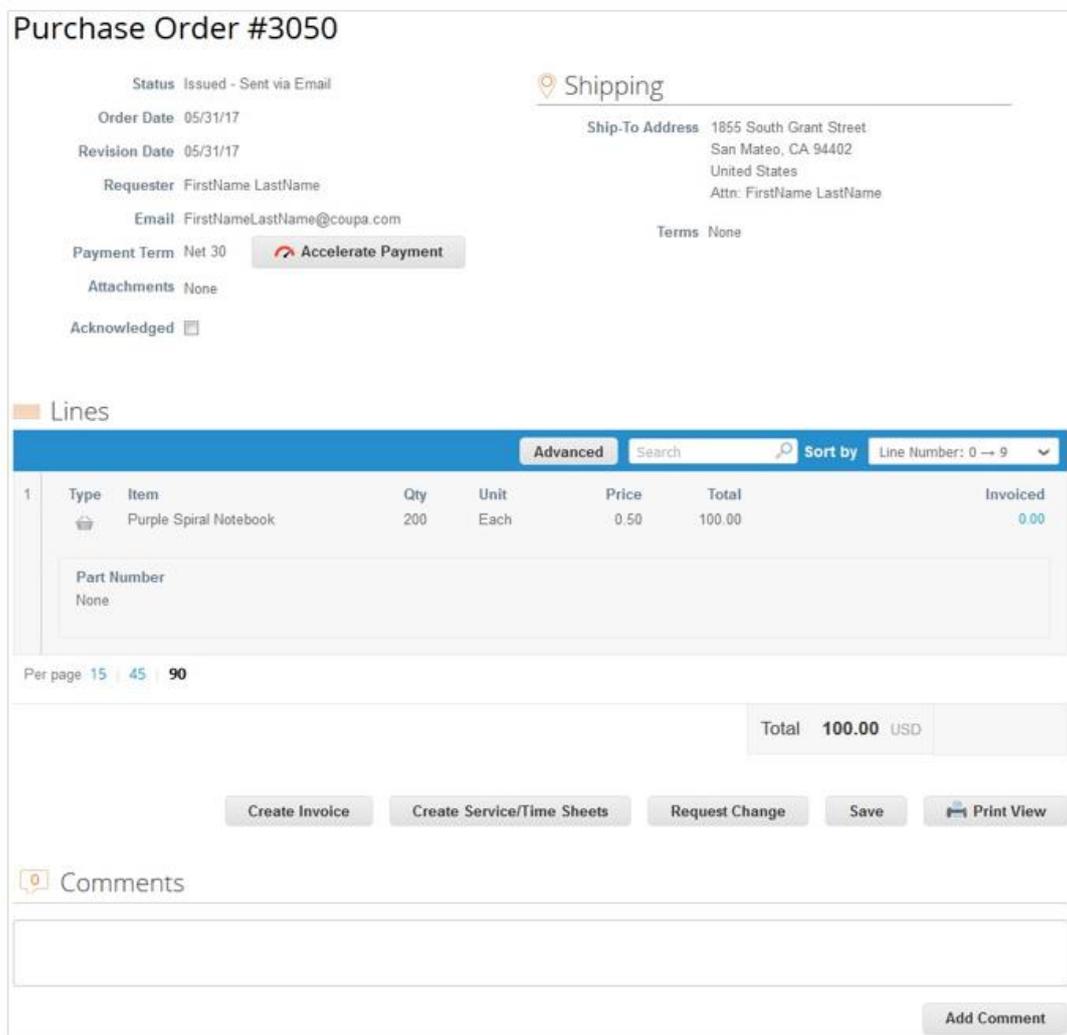
Coupa Supplier Portal User Guide

Create an Invoice from a PO



Create an Invoice from a PO

1. Go to the Orders page or, on the Invoices page, click on the Create Invoice from PO button above the table to go to the Orders page.
2. On the Orders page, do one of the following:
 - Click on the Create Invoice (👉) icon for the PO in the Actions column of the Purchase Orders table.
 - Click on the PO Number link to open the purchase order and click on the Create Invoice button.



Purchase Order #3050

Status: Issued - Sent via Email

Order Date: 05/31/17
Revision Date: 05/31/17

Requester: FirstName LastName
Email: FirstNameLastName@coupa.com

Payment Term: Net 30 [Accelerate Payment](#)

Attachments: None
Acknowledged:

Shipping

Ship-To Address: 1855 South Grant Street
San Mateo, CA 94402
United States
Attn: FirstName LastName

Terms: None

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Purple Spiral Notebook	200	Each	0.50	100.00	0.00

Part Number: None

Per page: 15 | 45 | 90

Total: 100.00 USD

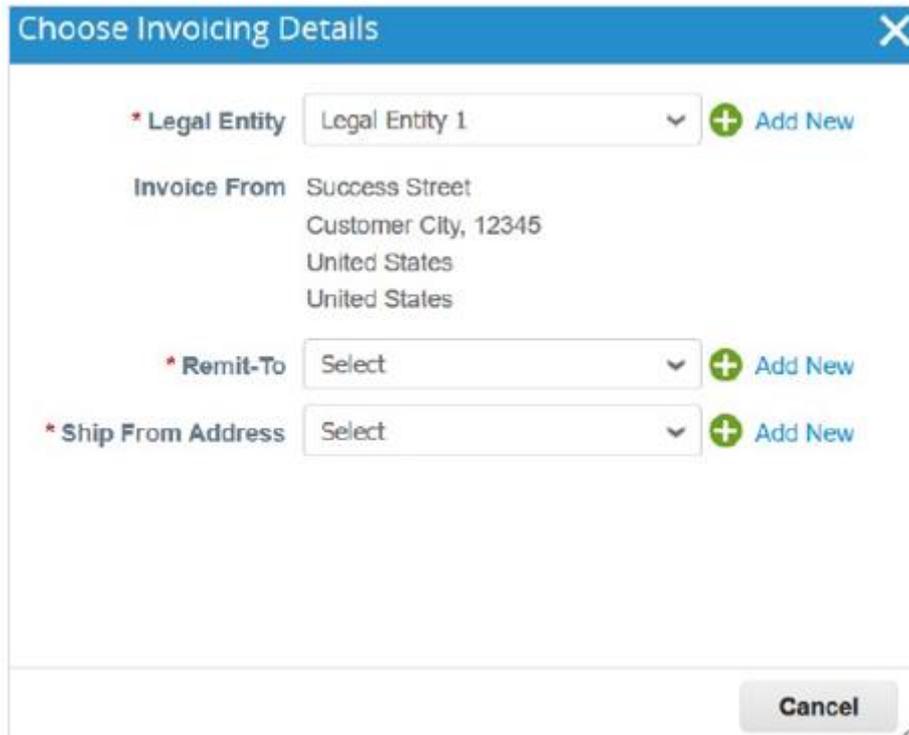
[Create Invoice](#) [Create Service/Time Sheets](#) [Request Change](#) [Save](#) [Print View](#)

Comments

[Add Comment](#)

3. Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address.

When you select a legal entity, the popup displays the Invoice From addresses available for the legal entity and information about how Wintershall Dea can pay this legal entity, for example, "This customer can pay you by Bank Account."



The screenshot shows a 'Choose Invoicing Details' popup window. It contains the following fields and options:

- * Legal Entity:** A dropdown menu with 'Legal Entity 1' selected. To its right is a green plus icon and the text 'Add New'.
- Invoice From:** A text area containing 'Success Street', 'Customer City, 12345', 'United States', and 'United States'.
- * Remit-To:** A dropdown menu with 'Select' selected. To its right is a green plus icon and the text 'Add New'.
- * Ship From Address:** A dropdown menu with 'Select' selected. To its right is a green plus icon and the text 'Add New'.

A 'Cancel' button is located at the bottom right of the popup.

If you do not have a legal entity, you need to add one by clicking on the Add New link or on the add/plus (+) icon.

You are guided through creating your legal entity. The selected or newly created legal entity is added to your invoice.

4. On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO.

Create Invoice Create

General Info

* Invoice #

* Invoice Date 

Payment Term  Accelerate Payment

* Currency

Delivery Number

Status

Shipping Term

Image Scan No file selected.

Supplier Note

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

Discount Amount

Payment Order Reference

From

* Supplier

Supplier Tax ID

* Invoice From Address 
 123 Success Ave
 Results City, XY 99999
 United States

* Remit-To Address 
 123 Success Ave
 Results City, XY 99999
 United States

* Ship From Address 
 123 Success Ave
 Results City, XY 99999
 United States

To

Customer

* Bill To Address

Buyer Tax ID

Ship To Address

Lines

Line Level Taxation

 Add Line

Subtotal			0.00
Shipping		<input type="text"/>	
Tax Description (Shipping)	<input type="text"/>	<input type="text"/>	0.000
Handling		<input type="text"/>	
Tax Description (Handling)	<input type="text"/>	<input type="text"/>	0.000
Misc		<input type="text"/>	
Tax Description (Misc)	<input type="text"/>	<input type="text"/>	0.000
Tax Description	<input type="text"/>	<input type="text" value="0"/>	0.00 
Total Tax			0.00
Total			0.00

 Delete

Cancel

Save as draft

Calculate

Submit

Comments

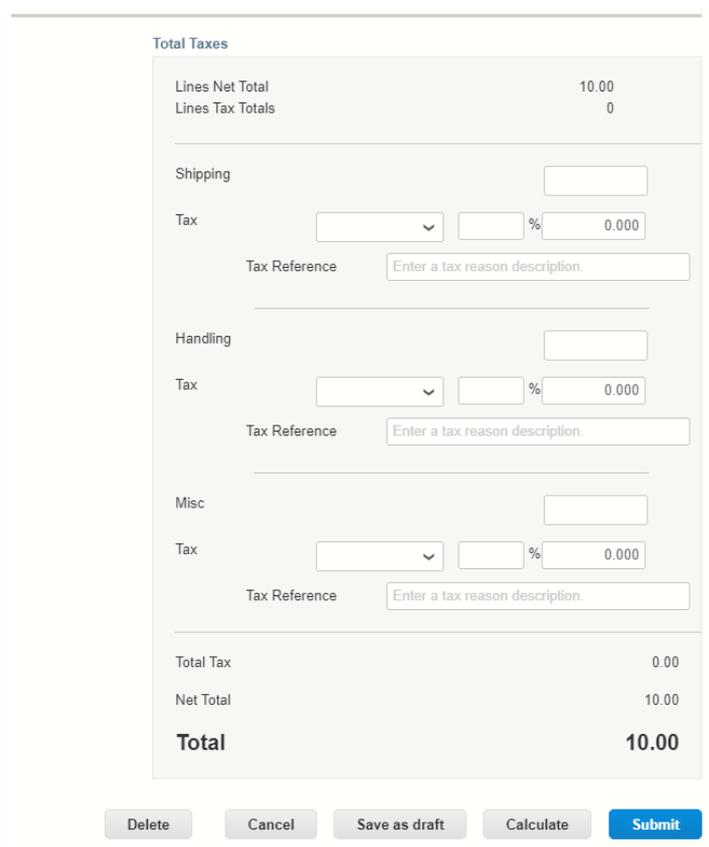
Add Comment

Fill in at least the mandatory fields (marked with a red asterisk). You can **create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding Search (magnifying glass) icon in the From section.** You are guided through creating your legal entity.

You can also attach files to an invoice using Image Scan. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

In the Subtotal section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.



Total Taxes	
Lines Net Total	10.00
Lines Tax Totals	0
Shipping	
Tax	<input type="text"/> % <input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Handling	
Tax	<input type="text"/> % <input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Misc	
Tax	<input type="text"/> % <input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Total Tax	0.00
Net Total	10.00
Total	10.00

Buttons: Delete, Cancel, Save as draft, Calculate, Submit

Clicking **Calculate** will give you the gross total amount considering the tax values.

You can add invoice lines to your invoice by clicking on the Add Line link or the Add (+) icon next to it.

[https://success.coupa.com/Suppliers/For Suppliers/Coupa Supplier Portal](https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal)