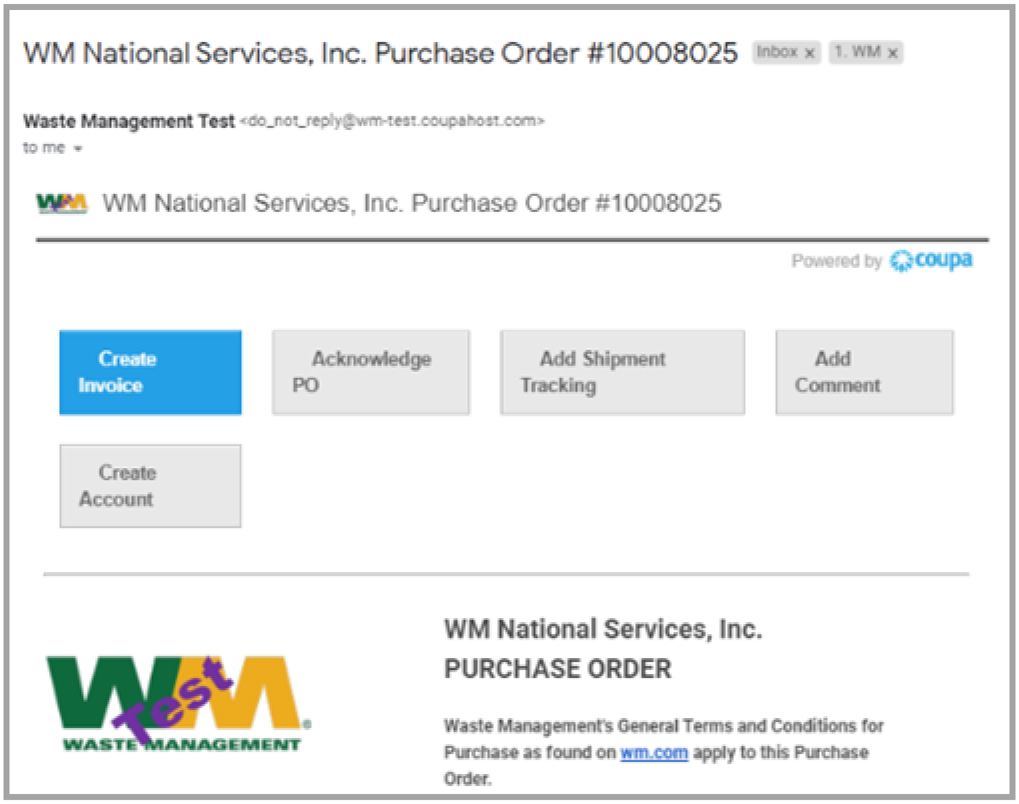
Creating an Invoice

About this Guide

This guide will review the process for creating an invoice from either a PO email from WM or the Coupa Supplier Portal.

Step 1a: Via Email

Click the blue **"Create Invoice"** button at the top of the email you received from WM.



Note: Clicking the **"Acknowledge PO,"** button will notify WM that you have received the PO.

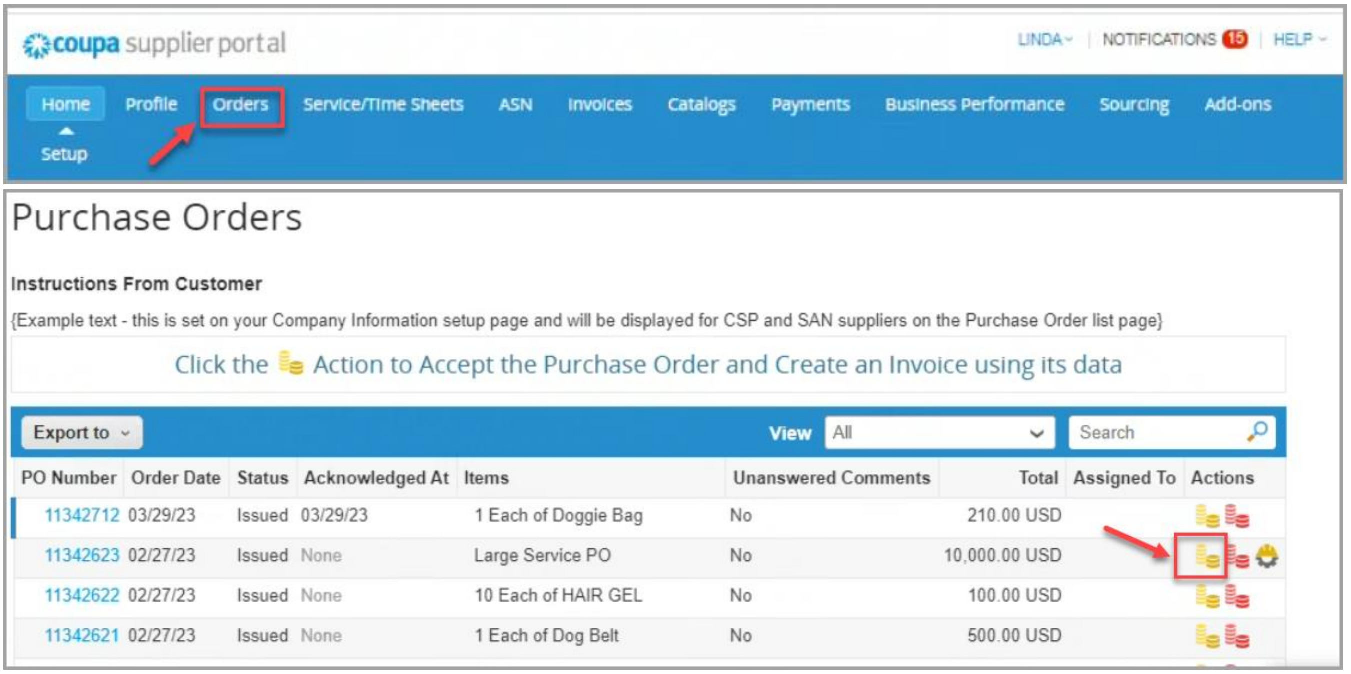
Creating an Invoice

Step 1b: Via the Coupa Supplier Portal

Login to the **Coupa Supplier Portal.**

Click on the **Orders** tab to view **Purchase Orders** and to find the PO you need to invoice against.

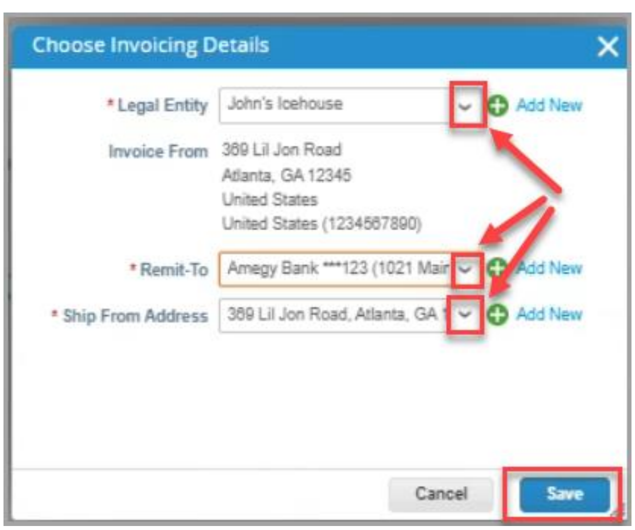
Click on the stack of **gold coins** in the **Actions** column OR click the **PO number**.



Step 2:

The **Choose Invoicing Details** screen will appear if you have not previously chosen a Legal Entity.

Once the Legal Entity has been selected, you can select the **"Remit-To"** and **"Ship From Address"** from the dropdowns and click **"Save"** at the bottom of the screen.

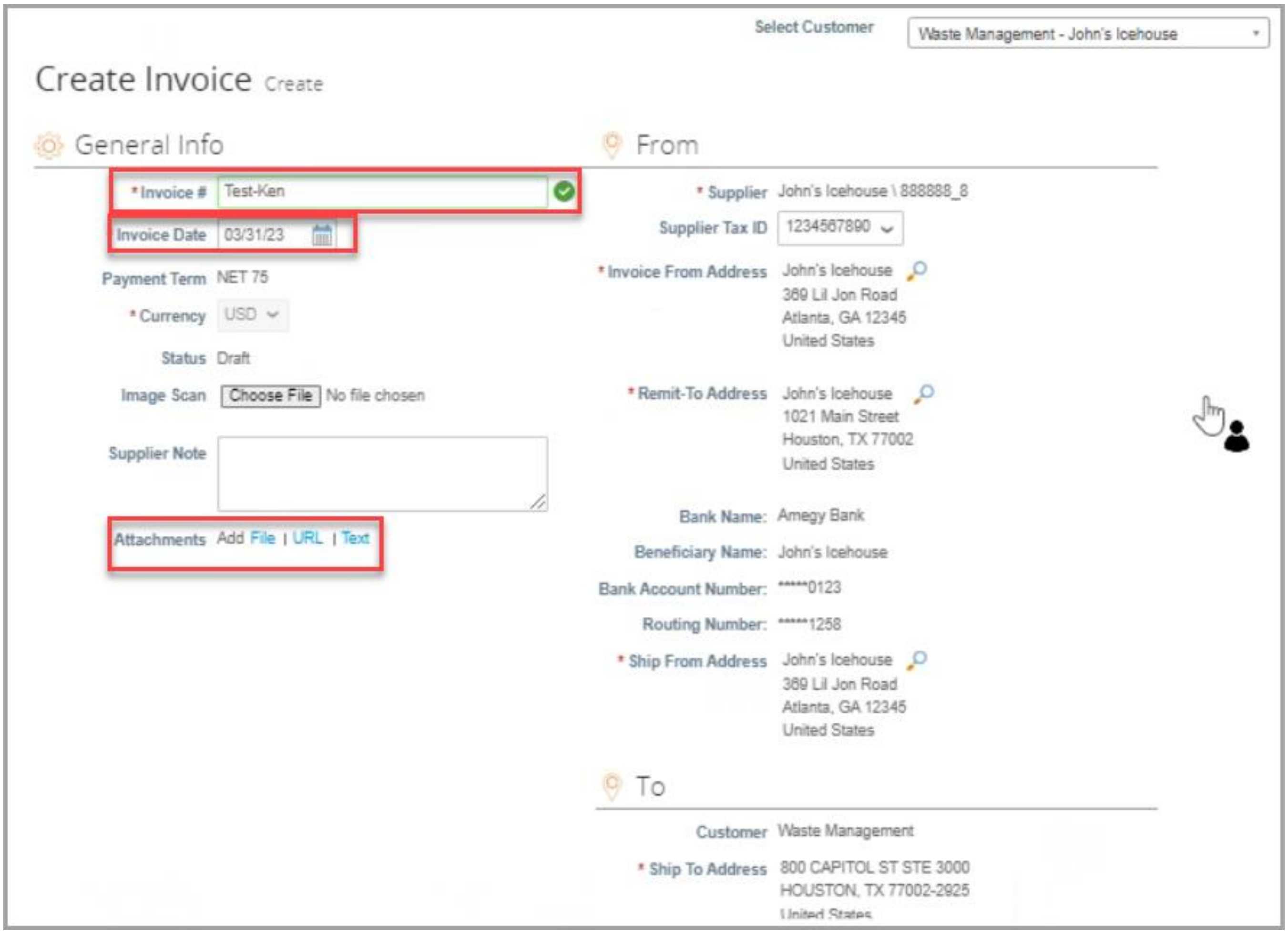


Creating an Invoice

Step 3:

Complete the required fields noted with a **red asterisk (*).**

Attach the **PDF Invoice** in the Attachments field.



Notes: *The Invoice number in Coupa must be* ***unique*** *and must* ***match the invoice number*** *in the attachment.*

If the Invoice ***Invoice From Address, Remit-To Address, or Ship From Address do not appear****, click the magnifying glass to select the respective addresses. If there is nothing to select, you have not completed the-Invoicing setup (see the* ***Coupa Supplier Registration and Electronic Invoicing*** *guide).*

If there are multiple invoices for a Purchase Order, they must be ***submitted separately.***

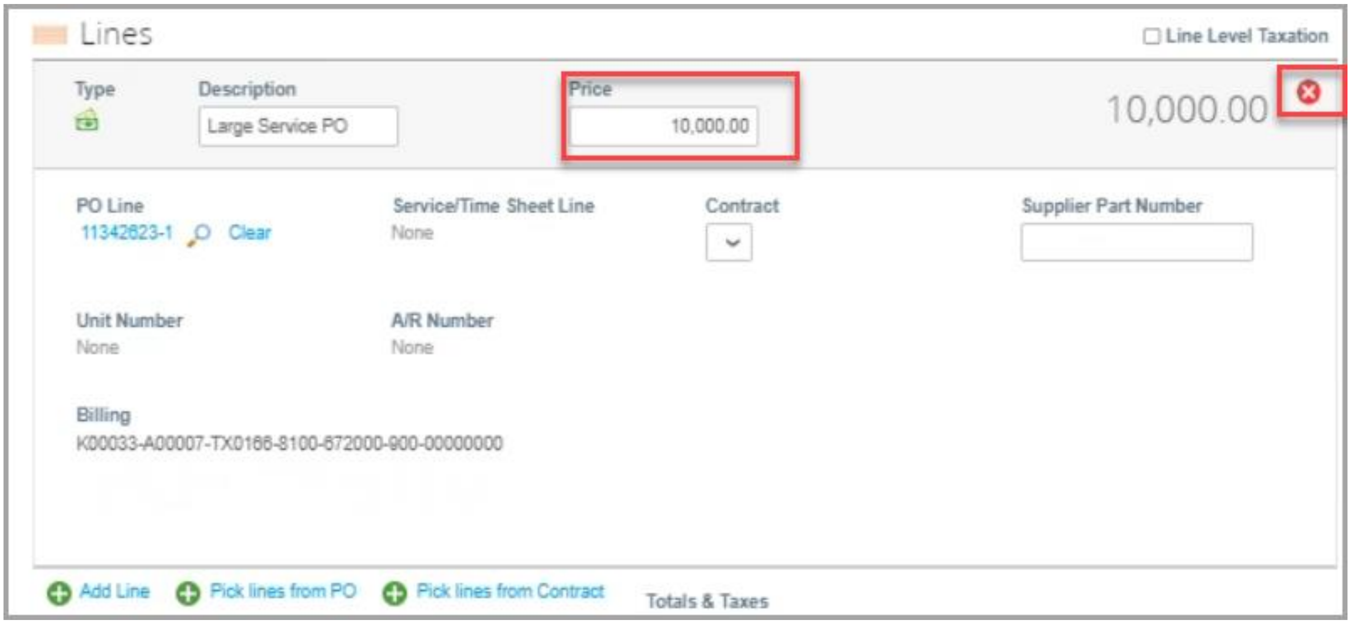
Creating an Invoice

Step 4:

If you need to delete a Purchase Order line or you are invoicing against a Purchase Order with multiple lines, please click on the red X **( )** next to the line(s) you are not invoicing against.

Adjust the **Price** field to reflect the desired billing amount.

Note: *If you are not invoicing for the entire Purchase Order, you must* ***delete unused lines.***

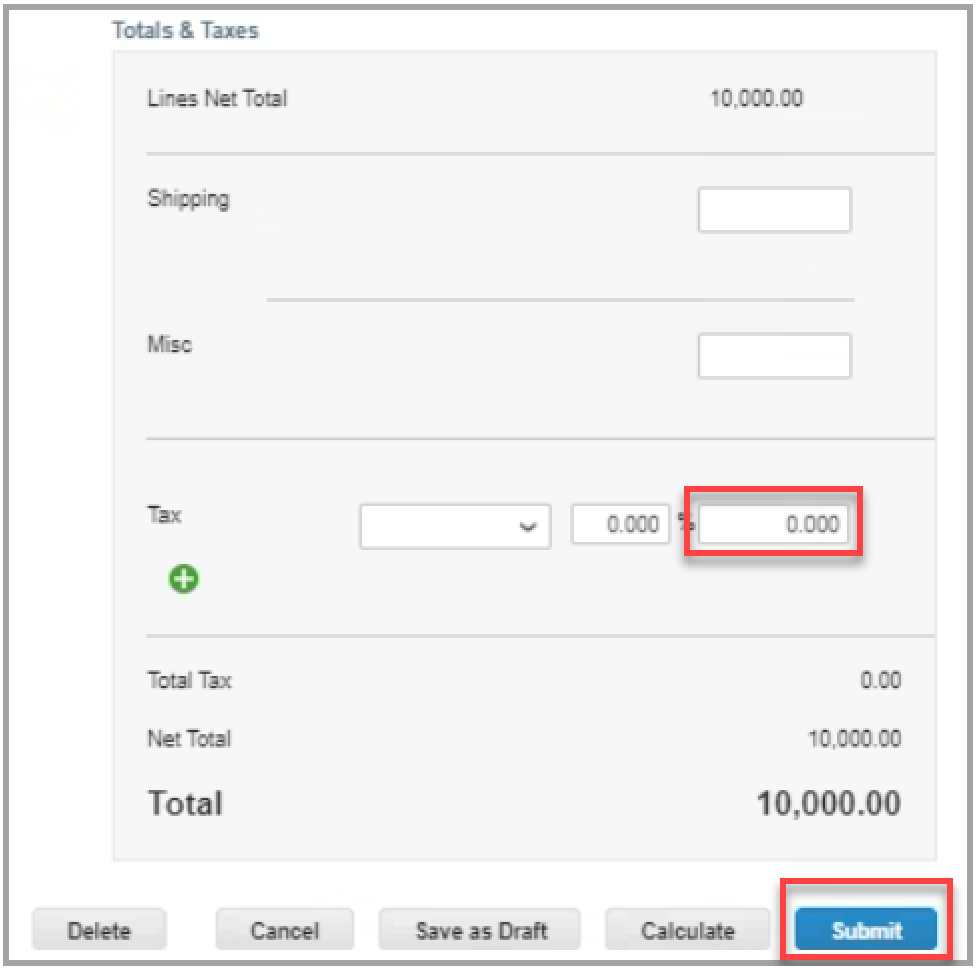


Step 5a:

If applicable, enter the Tax Amount under the **Tax** field at the bottom of the screen.

Click **Calculate** to calculate the total price including Tax.

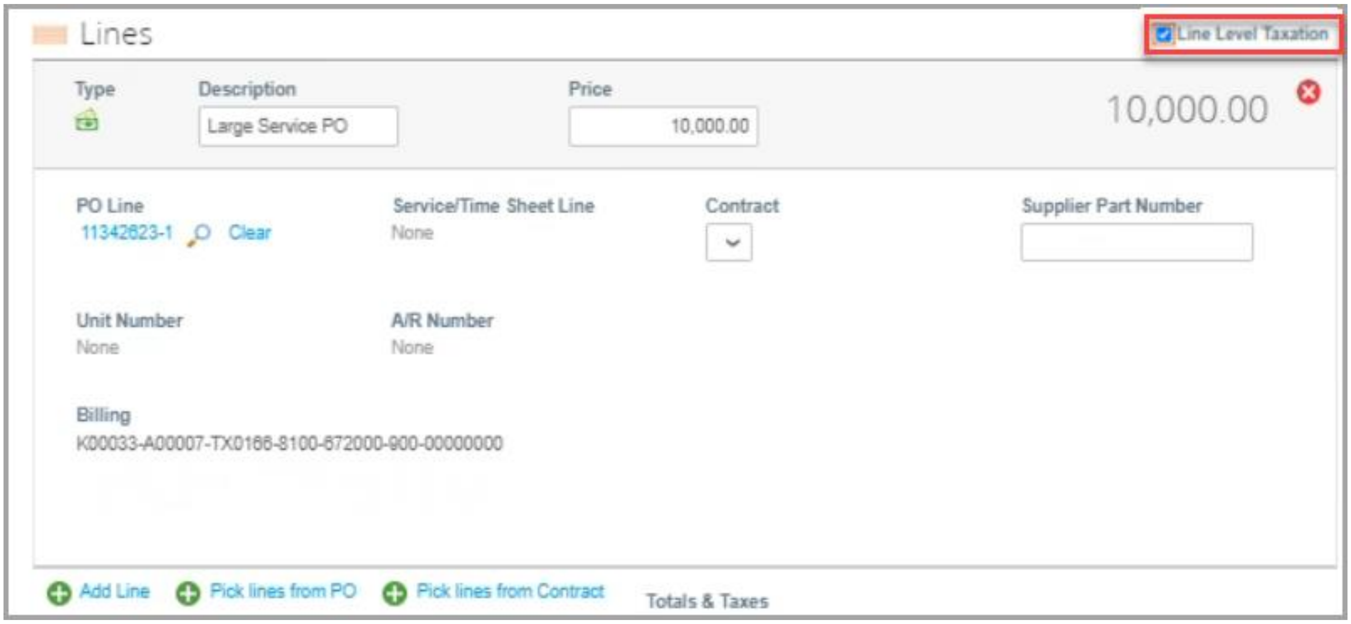
Click **Submit** once complete.



Step 5b:

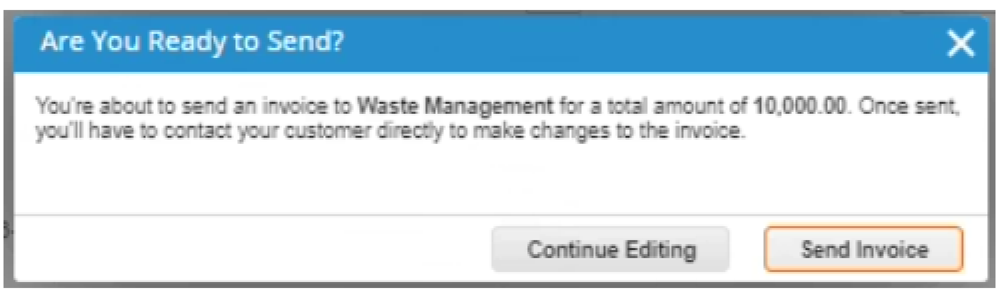
If there is line level taxation, you can input the Tax per Purchase Order line by checking the **"Line Level Taxation"** checkbox.

A Tax box will appear on the individual PO line where you will enter the **Tax Rate.**



Step 6:

After clicking the **Submit** button, you will receive the below message, **Are You Ready to Send?** From here you can continue to edit the invoice (**Continue Editing)** or send the invoice **Send Invoice**).



Creating an Invoice

Step 7:

After sending the invoice, you will be taken to the Invoice screen where you can see the invoice # and status of the invoice.