

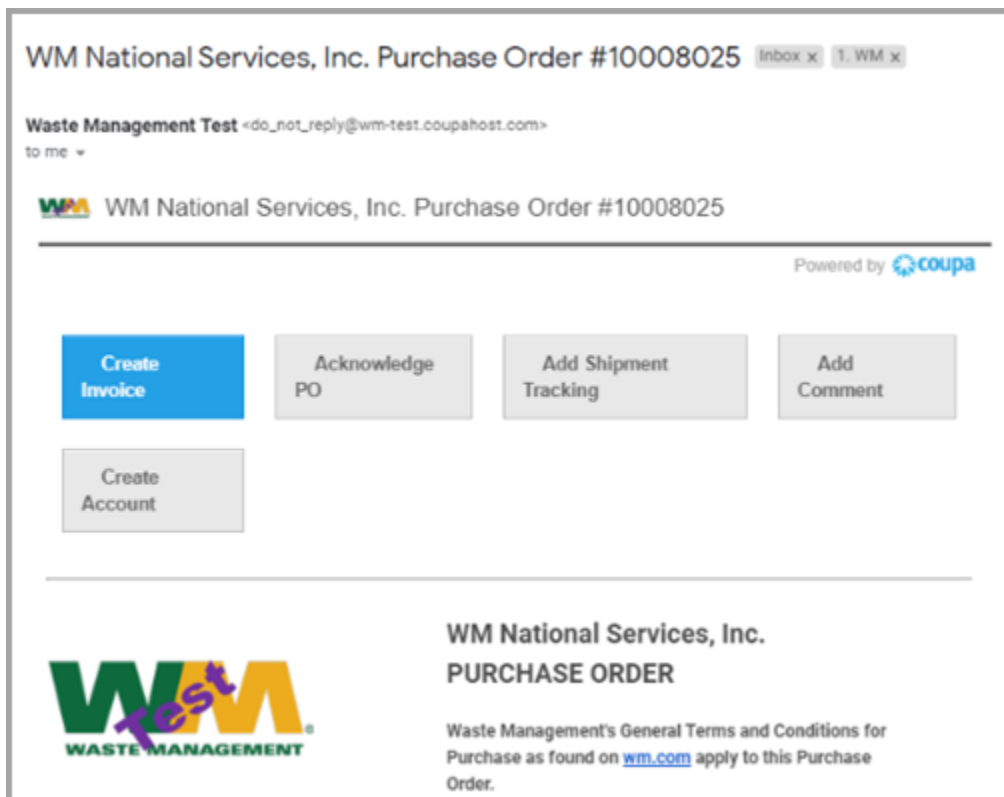
# Creating an Invoice

## 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.

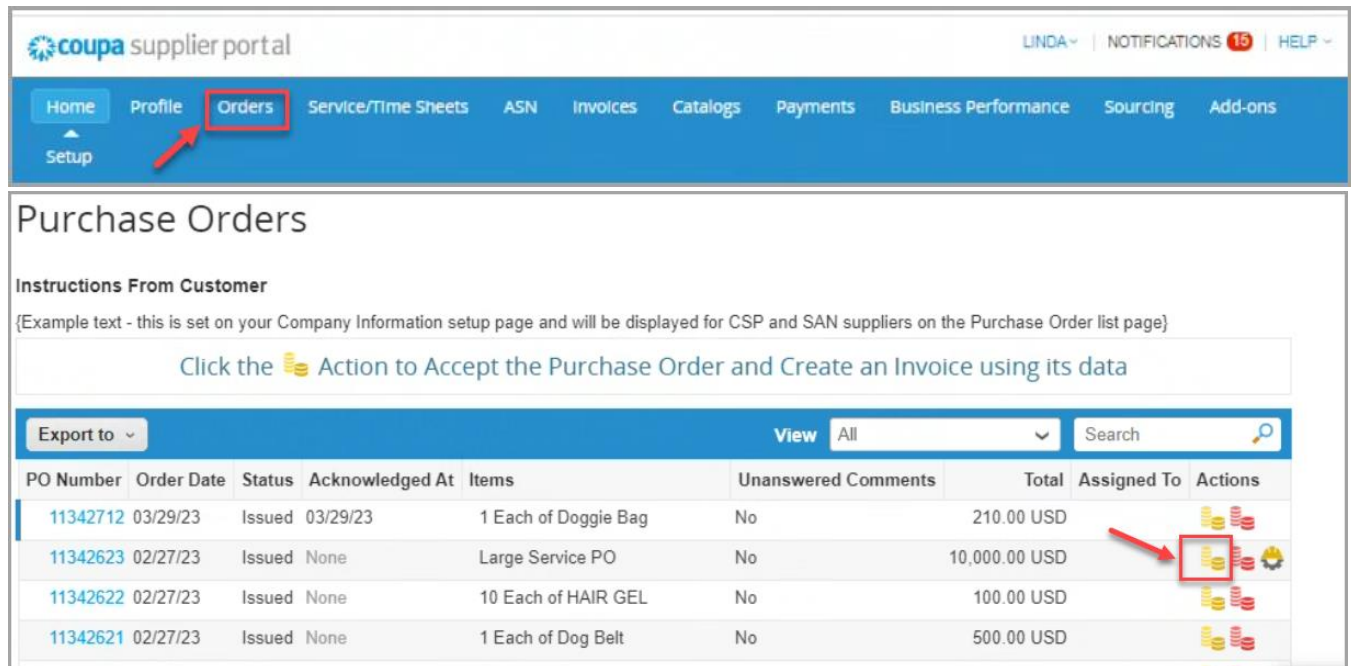
# Creating an Invoice

## 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**.








**coupa** supplier portal LINDA | NOTIFICATIONS 15 | HELP

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

### 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}

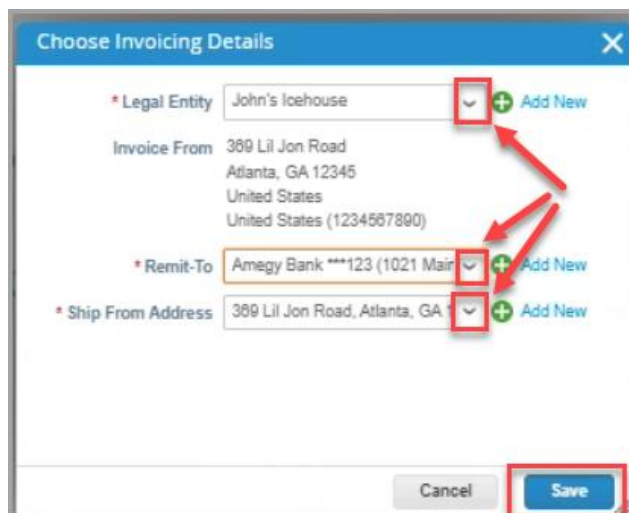
Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
11342712	03/29/23	Issued	03/29/23	1 Each of Doggie Bag	No	210.00 USD		
11342623	02/27/23	Issued	None	Large Service PO	No	10,000.00 USD		
11342622	02/27/23	Issued	None	10 Each of HAIR GEL	No	100.00 USD		
11342621	02/27/23	Issued	None	1 Each of Dog Belt	No	500.00 USD		



## 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.





**Choose Invoicing Details**

\* Legal Entity: John's Icehouse  

Invoice From: 389 Lil Jon Road  
Atlanta, GA 12345  
United States  
United States (1234567890)

\* Remit-To: Amegy Bank \*\*\*123 (1021 Main)  

\* Ship From Address: 389 Lil Jon Road, Atlanta, GA  

Cancel Save

# Creating an Invoice

## Step 3:

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

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

Select Customer: Waste Management - John's Icehouse

### Create Invoice Create

#### General Info

\* Invoice # Test-Ken ✓

Invoice Date 03/31/23

Payment Term NET 75

\* Currency USD

Status Draft

Image Scan  No file chosen

Supplier Note

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

#### From

\* Supplier John's Icehouse \ 888888\_8

Supplier Tax ID 1234567890

\* Invoice From Address John's Icehouse  
389 Lil Jon Road  
Atlanta, GA 12345  
United States

\* Remit-To Address John's Icehouse  
1021 Main Street  
Houston, TX 77002  
United States

Bank Name: Amegy Bank

Beneficiary Name: John's Icehouse

Bank Account Number: \*\*\*\*\*0123

Routing Number: \*\*\*\*\*1258

\* Ship From Address John's Icehouse  
389 Lil Jon Road  
Atlanta, GA 12345  
United States

#### To

Customer Waste Management

\* Ship To Address 800 CAPITOL ST STE 3000  
HOUSTON, TX 77002-2925  
United States


**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**.

Lines  Line Level Taxation

Type	Description	Price	
	Large Service PO	10,000.00	10,000.00 

PO Line 11342823-1  Clear	Service/Time Sheet Line None	Contract <input type="button" value="v"/>	Supplier Part Number <input type="text"/>
Unit Number None	A/R Number None		
Billing K00033-A00007-TX0166-8100-672000-900-00000000			

 Add Line    Pick lines from PO    Pick lines from Contract   Totals & Taxes

# Creating an Invoice

## 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.

**Totals & Taxes**

Lines Net Total	10,000.00
Shipping	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text" value="0.000"/>
<input style="color: green;" type="button" value="+"/>	
Total Tax	0.00
Net Total	10,000.00
<b>Total</b>	<b>10,000.00</b>

# Creating an Invoice

## 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**.

The screenshot shows a 'Lines' table with the following data:

Type	Description	Price	
	Large Service PO	10,000.00	10,000.00

Below the table, there are fields for:

- PO Line: 11342823-1
- Service/Time Sheet Line: None
- Contract:
- Supplier Part Number:
- Unit Number: None
- A/R Number: None
- Billing: K00033-A00007-TX0166-8100-672000-900-00000000

At the bottom, there are buttons: Add Line, Pick lines from PO, Pick lines from Contract, and Totals & Taxes.

## 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**).

The dialog box has a blue header with the text "Are You Ready to Send?" and a close button (X). The main text reads: "You're about to send an invoice to Waste Management for a total amount of 10,000.00. Once sent, you'll have to contact your customer directly to make changes to the invoice." At the bottom, there are two buttons: "Continue Editing" and "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.

Select Customer: Waste Management - John's Icehouse

### Invoices

John's Icehouse \ 888888\_8 invoice #Test-Ken is processing

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Test-Ken	03/31/23	Processing	11342623	10,000.00 USD	No		
None	03/08/23	Draft	11342622	150.00 USD	No		
2.28.2023 TEST	02/28/23	Pending Approval	11342620	5,010.00 USD	No		
test 12345	02/28/23	Approved	11342622	-50.00 USD	No		