Coupa Supplier Portal User Guide

Create an Invoice from a PO

To flip a PO into an invoice, do one of the following:

- Click on the Create Invoice (golden coins) icon for the PO in the Purchase Orders table.
- Click on the PO Number link to open the purchase order and click on the Create Invoice button.

- In the appearing window, choose the Invoice From Address. The most recently used address is at the top of the list.
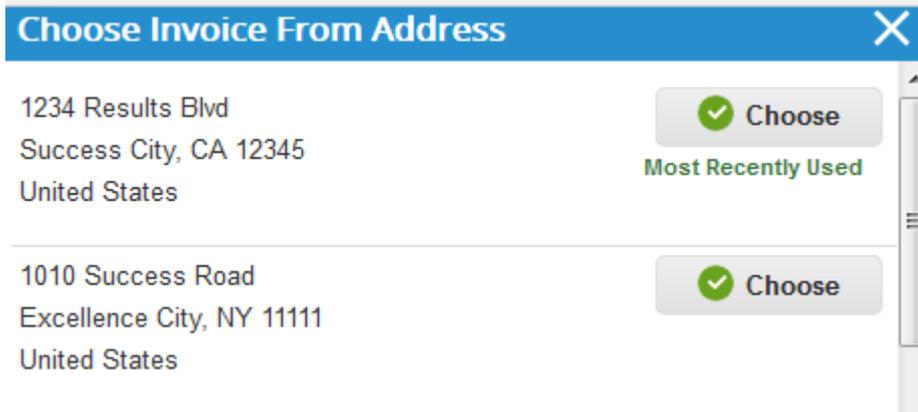
- On the **Create Invoice** page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO.

- 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.

- 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.

- Selecting the Line Level Taxation checkbox, allows you to enter tax information for each invoice line.

- Submit the invoice or save it as a draft to submit it later. You can also add comments for your customer.

- Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

- Similarly to creating an invoice, you can create a credit note by clicking on the **Create Credit Note** (red coins) icon for the PO in the Actions column of the Purchase Orders table.