



Creating an Invoice against a PO



Creating a PO Backed Invoice

- a) Click on “Orders” tab & find the PO that you want to create an invoice for
- b) Click on the “Create Invoice” icon 
- c) Fill out all the fields with an asterisk (*) (Note: “Invoice #” must have less than 20 characters in the field)
- d) Attach detailed invoice in the “Image Scan” field
- e) Check & edit the invoice line & other details, if required
- f) Select the “Line Level Taxation” check box if you want to add taxes at a line level
- g) Add additional lines by clicking on the icon  Add Line
 - i. Choose “Type” for the type of invoice line you want to create, and enter description, quantity (only if “Qty” selected) and price
 - ii. Enter billing segments in the “Billing” field
 - iii. Enter line level taxes, if “Line Level Taxation” was selected in step (f)
 - iv. Enter “Shipping”, “Handling”, and “Misc” charges, if applicable, as a separate line item (Note: only enter pre-tax amounts in these fields)
- h) If “Line Level Taxation” check box was not selected in step (f), then enter taxes at the invoice level
- i) Click on the “Calculate” button, and then click on “Submit”

Coupa Link:

<https://supplier.coupahost.com>

Support Email:

B2B.Support@nal.ca

Tips:

- ✓ Enter invoice line in the same level of detail as you currently are
- ✓ Choose “Line Level Taxation” check box if invoice lines require different tax codes
- ✓ Add late payment charge as a separate line: Type: CC Based, CC#: H01013, Major: 0806, Minor: 009
- ✓ Clicking on “Calculate” button prior to submitting the invoice helps you validate the total prior to submitting

Coupa Invoice Page: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/CSP_FAQ/Invoices

Coupa Support Videos: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/02_CSP_Videos