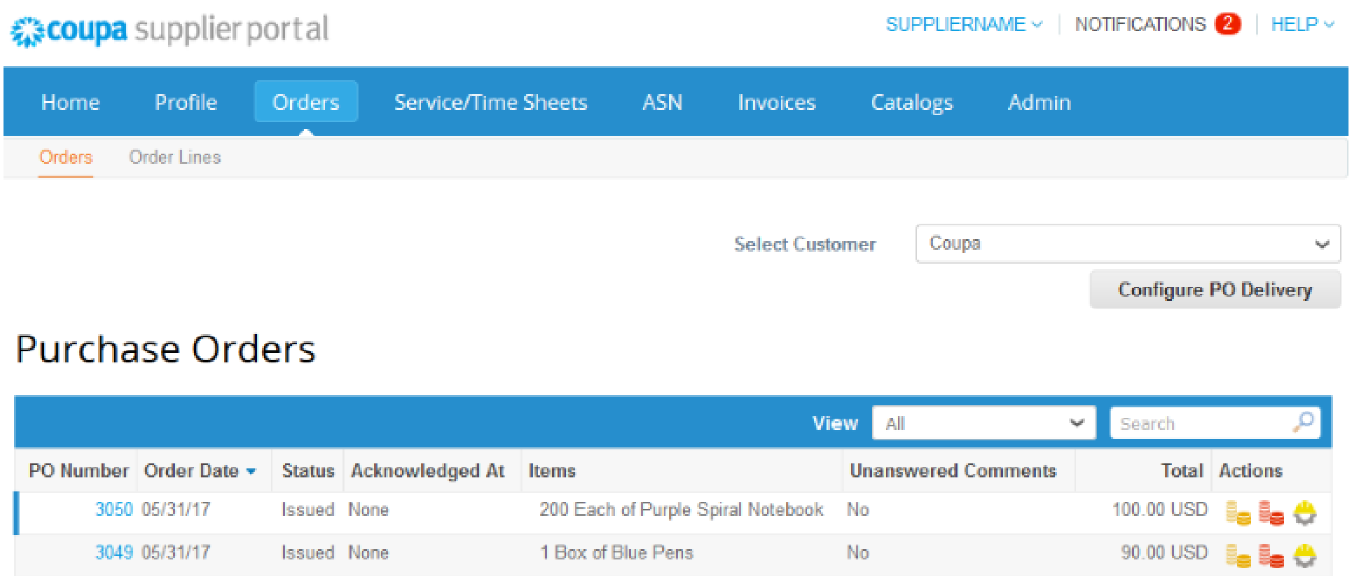
Create an Invoice from a Purchase Order

View and Manage PO's – log on to the Coupa Supplier Portal (CSP)

Click on the **Orders** tab on the main menu. The **Purchase Orders** page appears.



From the **Select Customer** drop-down list in the top right corner, select the customer whose POs you want to see.

> **Note:** When you visit the page again, it shows you the POs from the customer you selected last time.

The **Purchase Orders** table shows the following information for all the POs you received from the selected customer.

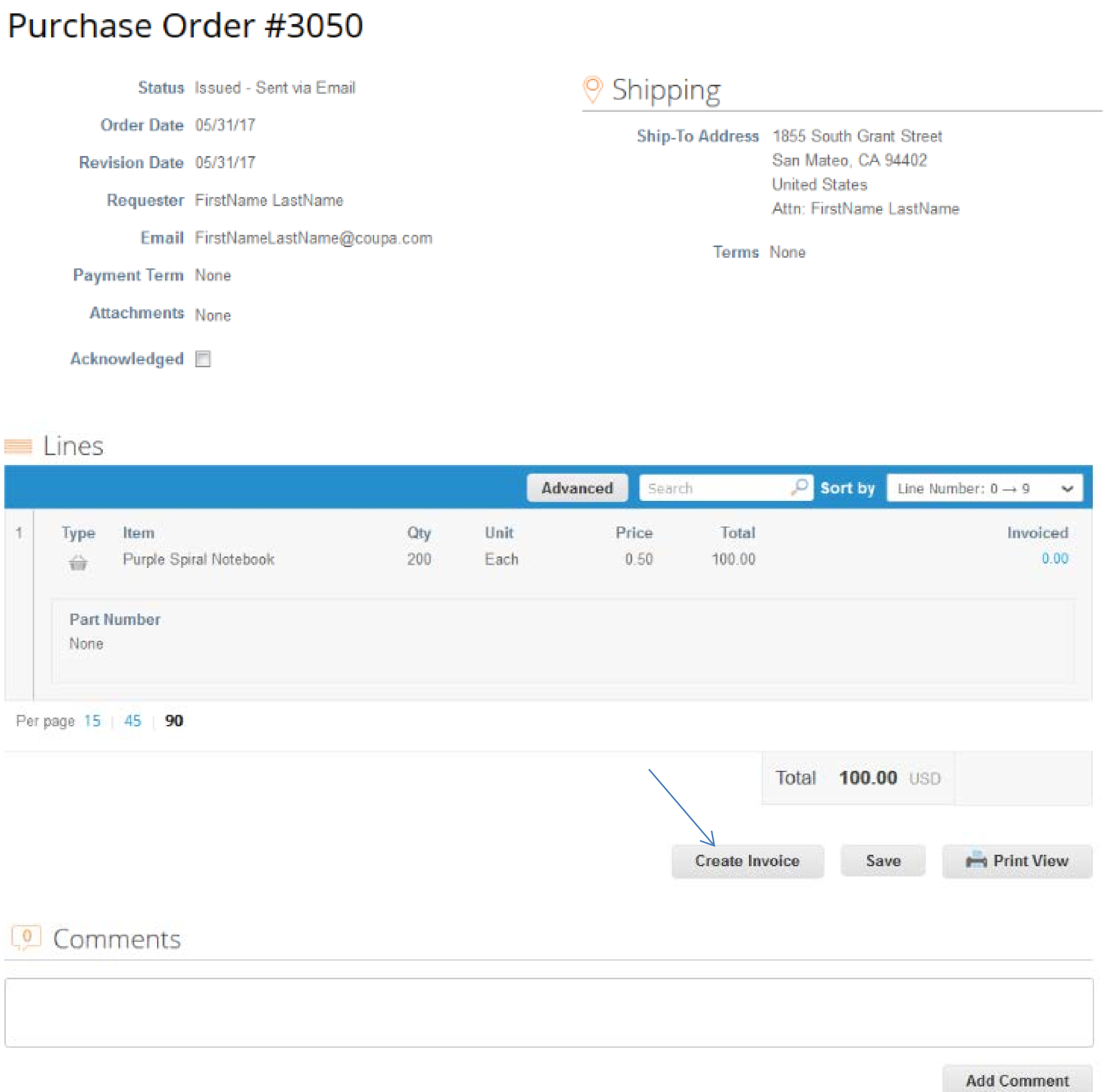
Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO.
Order Date	Date when the PO was created.
Status	Current status of the PO. See the PO status list below for more info.
Acknowledged At	Date when you acknowledged the receipt of the PO, or "None" if not acknowledged. You can choose to let your customer know that you received their PO by selecting the **Acknowledged At** checkbox on the PO. When you select the checkbox, the current date appears in the **Acknowledged At** column. This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date appears.
Items	List of items on the PO.
Unanswered Comments	Your comments on the PO for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the customer when you open the PO. **Note:** If you need urgent communication, contact your customer directly.
Total	Total amount of the PO.
Actions	Click on the icons for the following actions: • - Create (flip the PO into) an invoice. • - Create a credit note. • - Create a service/time sheet. • - Create (flip the PO into) an advance ship notice (ASN).

POs can have the following statuses:

Status	Description
Buyer Hold	The PO is approved but pending buyer review.
Cancelled	The PO is cancelled and doesn't need to be fulfilled.
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Error	There's something wrong with the PO. Contact your customer to get the PO back on track.
Issued	The PO was approved and sent to you.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.

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

- Click on the **Create Invoice** ( ) 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.



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	None
Attachments	None
Acknowledged	

Shipping

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

Terms: None

Lines

Advanced | Search | Sort by: Line Number: 0 → 9

	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

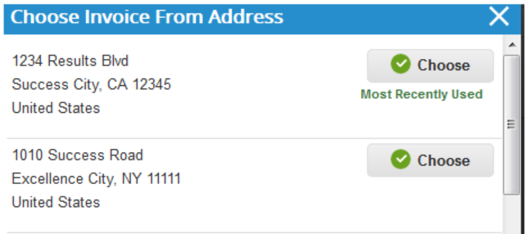
Total 100.00 USD

Create Invoice | Save | Print View

Comments

Add Comment

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. See Create or Edit an Invoice for more info.

Create or Edit an Invoice

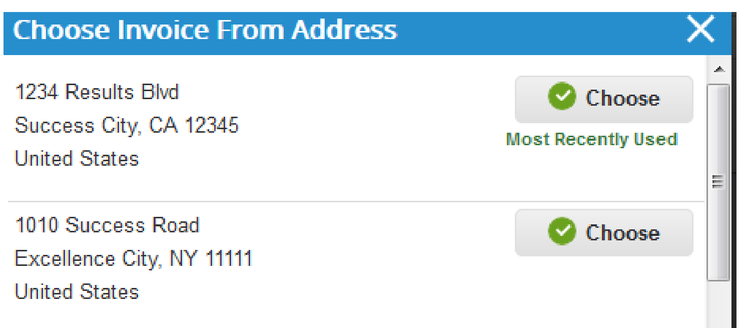
To create an invoice without a contract or against a contract, select the relevant radio button (**No contract** or **Invoice Against Contract**) under the **Invoices** table and click **Create**. When creating an invoice against a contract, you must first select the contract from the drop-down list.

Use the **Credit Note** button to create a credit note. See Create a Credit Note for more info.

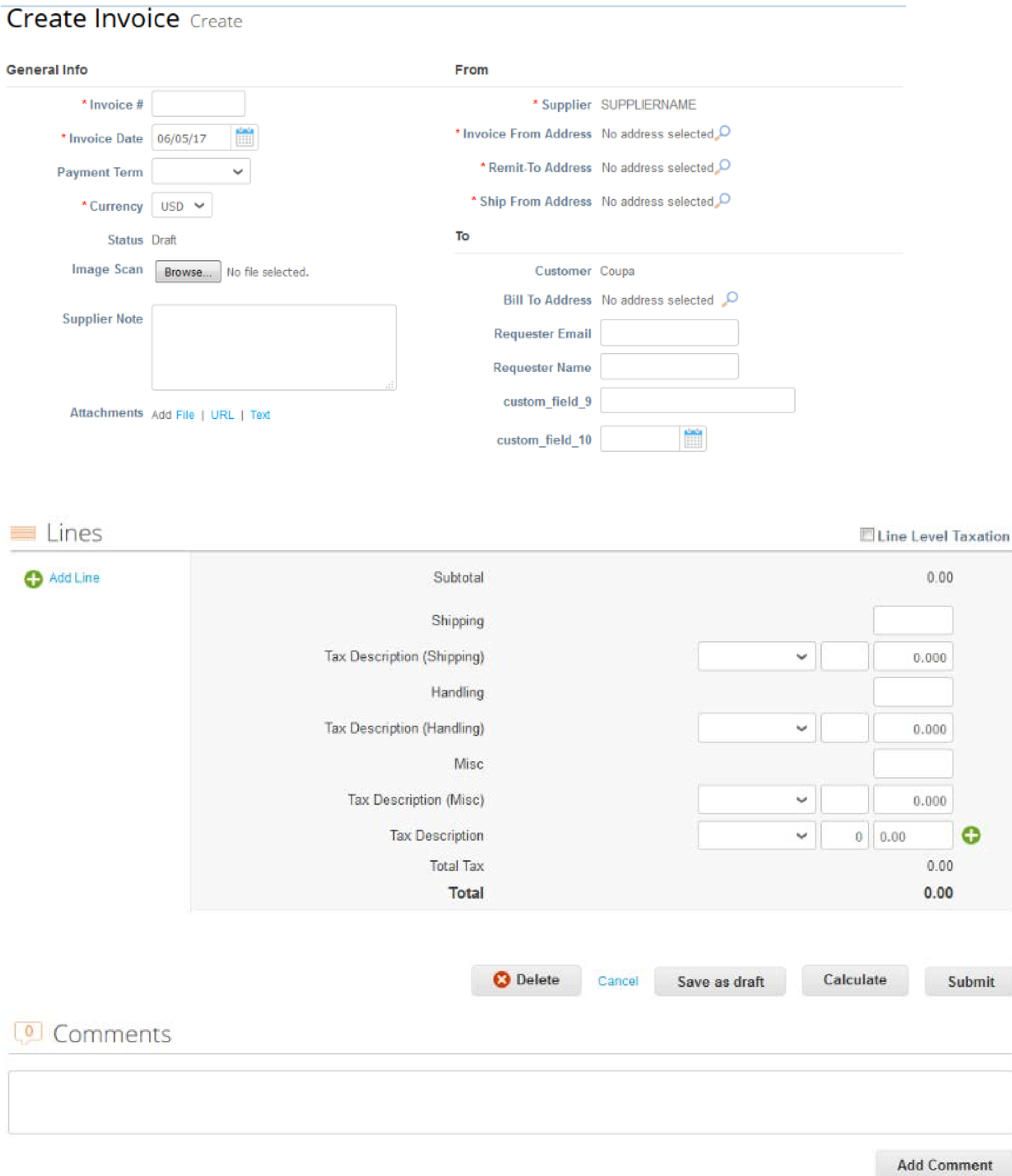
To edit a draft invoice, do one of the following:

- Click on the **Edit** (✎) icon for the invoice in the **Invoices** table.
- Click on the **Invoice #** link to open the invoice and click on the **Edit** 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). You have to select an invoice from, a remit-to, and a ship from address by clicking on the icon next to the address field.



Note: When adding lines, you cannot pick lines from a 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 l'vecode 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.

Subtotal			363.00
Shipping			10
Tax Description (Shipping)	US: CA - 8.25	8.25	0.83
Handling			8
Tax Description (Handling)	US: CA - 8.25	8.25	0.66
Misc			1
Tax Description (Misc)	US: CA - 8.25	8.25	0.08
Total Tax			1.57
Total			**383.57**

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.

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.

> **Note:** If you want to make changes to the invoice after submitting it, you have to contact your customer.

***Please note that Members 1st FCU is a not for profit/tax exempt organization**