



wintershall dea

HOW TO CREATE AN INVOICE FROM A PO

# COUPA SUPPLIER PORTAL (CSP) USER GUIDE

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## HOW TO CREATE AN INVOICE FROM A PO

1. Go to the Orders page or, on the Invoices page, click on the Create Invoice from PO button above the table to go to the Orders page.
2. On the Orders page, do one of the following:
  - Click on the Create Invoice (👉) icon for the PO in the Actions column of 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: Net 30 [Accelerate Payment](#)

Attachments: None

Acknowledged:

**Shipping**

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

Terms: None

**Lines**

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](#) [Create Service/Time Sheets](#) [Request Change](#) [Save](#) [Print View](#)

**Comments**

[Add Comment](#)

3. Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address.

When you select a legal entity, the popup displays the Invoice From addresses available for the legal entity and information about how Wintershall Dea can pay this legal entity, for example, "This customer can pay you by Bank Account."

**Choose Invoicing Details**

\* Legal Entity Legal Entity 1 + Add New

Invoice From Success Street  
Customer City, 12345  
United States  
United States

\* Remit-To Select + Add New

\* Ship From Address Select + Add New

Cancel

If you do not have a legal entity, you need to add one by clicking on the Add New link or on the add/plus (+) icon.

You are guided through creating your legal entity. The selected or newly created legal entity is added to your invoice.

4. 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.

# Create Invoice Create

## General Info

\* Invoice #

\* Invoice Date

Payment Term

\* Currency

Delivery Number

Status

Shipping Term

Image Scan  No file selected.

Supplier Note

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

Discount Amount

Payment Order Reference

## From

\* Supplier

Supplier Tax ID

\* Invoice From Address    
123 Success Ave  
Results City, XY 99999  
United States

\* Remit-To Address    
123 Success Ave  
Results City, XY 99999  
United States

\* Ship From Address    
123 Success Ave  
Results City, XY 99999  
United States

## To

Customer

\* Bill To Address

Buyer Tax ID

Ship To Address

## Lines

Line Level Taxation

Add Line

Subtotal		0.00
Shipping		<input type="text"/>
Tax Description (Shipping)	<input type="text"/>	<input type="text"/> 0.000
Handling		<input type="text"/>
Tax Description (Handling)	<input type="text"/>	<input type="text"/> 0.000
Misc		<input type="text"/>
Tax Description (Misc)	<input type="text"/>	<input type="text"/> 0.000
Tax Description	<input type="text"/>	<input type="text"/> 0 0.00
Total Tax		0.00
<b>Total</b>		<b>0.00</b>

Delete

Cancel

Save as draft

Calculate

Submit

## Comments

Add Comment

Fill in at least the mandatory fields (marked with a red asterisk). You can **create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding Search (magnifying glass) icon in the From section**. You are guided through creating your legal entity.

You can also attach files to an invoice using Image Scan. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so. Image attachments on invoices must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF.

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.

Total Taxes	
Lines Net Total	10.00
Lines Tax Totals	0
<hr/>	
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Handling	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/> Enter a tax reason description.
<hr/>	
Total Tax	0.00
Net Total	10.00
<b>Total</b>	<b>10.00</b>

Buttons: Delete, Cancel, Save as draft, Calculate, Submit

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.

[https://success.coupa.com/Suppliers/For\\_Suppliers/Coupa\\_Supplier\\_Portal](https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal)

## IMPRINT

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