

## COUPA GUIDE: Invoice Creation – PO Backed vs Non-PO Backed

From the Coupa Supplier Portal homepage, click on the ‘Invoices’ tab in the blue section to go to the Invoice Creation section.

Once in the Invoice Creation section of CSP, you will be able to see any previous and current invoices. You will be able to keep track of all your invoices, including the status, the amounts, date of creation and any PO related to that invoice. You also have the option to create an invoice from a PO or an invoice that has no PO.

### Create Invoices i

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
TESTDGC7CR	08/10/21	Approved	None	100.00	No		
TESTDGC7	08/10/21	Approved	None	600.00	No		


## Invoice Creation – PO Backed

- To create an invoice from a PO (*purchase order*), select the 'Orders' tab

 coupa supplier portal



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- Click on 'Create Invoice' () icon for the PO in the 'Actions' column of the "Purchase Orders" table.

### Instructions From Customer

Please confirm receipt of this email and send the order confirmation and shipping notifications to purchasing@nhcare.org. For questions about invoicing please reach out to AP@nhcare.org.

 Click the  Action to Invoice from a Purchase Order

Export to ▾	View	All	Search	PO Number	Date Ordered	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
				<b>028163</b>	06/13/22	Issued	None	1 Each of Test for CSP guide	No	10.00		

OR

- Click on the 'PO Number' link to open the purchase order; once you have verified the PO information details are accurate. Click on the 'Create Invoice' button.

### Purchase Order #028163

#### General Info

Status Issued - Pending Manual  
Date Ordered 06/13/22  
Revision Date 06/13/22  
Requester Francisco Ochoa  
Email Francisco.Ochoa@nhcare.org  
Payment Term NET 30  
Acknowledged   
Assigned to


#### Shipping

Ship-To Address 150 La Terraza Blvd  
Suite 201  
Escondido, CA 92025  
United States  
Location Code: FINANCEACCOUNTING  
Attn: Francisco Ochoa  
Terms REGULAR

#### Shipment Tracking

No shipment tracking.

#### Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Test for CSP guide	1	Each	10.00	10.00	0.00

Part Number Manufacturer Name Manufacturer Part Number  
None None None

Per page 15 | 45 | 90

Total USD **10.00**

 **Create Invoice** Save Print View

- Enter the remaining invoice information and attach any invoice/back-up documents available. If you create or edit a PO-backed invoice some fields are

pre-populated and cannot be changed, such as: *Currency, UOM, Price, Quantity and Amount.*

- Make sure to select a 'Remit-To Address'.
- Enter the Invoice Number, Invoice Date, Attachments, Shipping/Handling fees or taxes. Once all entered, click on the 'Calculate' button, to verify total is correct, before clicking the 'Submit' button.

## Create Invoice Create

### General Info

**Invoice #** TESTDGC8 ✓

**Invoice Date** 07/15/22

Payment Term NET 30

**Currency** USD

Status Draft

Image Scan  No file selected.

Supplier Note

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

### From

**Supplier** \_Coupa Vendor Test Integration

Supplier Tax ID

**Invoice From Address** Coupa test supplier  
600 North Main Ave Suite 10  
San Antonio, TX 78205-1217  
United States

**Remit-To Address** No address selected

**Ship From Address** Coupa test supplier  
600 North Main Ave Suite 10  
San Antonio, TX 78205-1217  
United States

### To

Customer Neighborhood Healthcare

Buyer Tax ID

### Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	Test for CSP guide	1	Each	10.00	10.00
PO Line 028183-1	Contract	<input type="text"/>	Supplier Part Number	<input type="text"/>	
Billing 108-950-000-75300					

[+ Add Line](#) [+ Pick lines from Contract](#)

**Totals & Taxes**

The screenshot shows a Coupa invoice form with the following sections and highlighted elements:

- Shipping:** A red arrow points to the "Shipping" label. The input field is empty.
- Handling:** A red arrow points to the "Handling" label. The input field is empty.
- Misc:** A red arrow points to the "Misc" label. The input field is empty.
- Tax:** A red arrow points to the "Tax" label. The tax rate is set to 0.000% and the amount is 0.000.
- Totals:** A red arrow points to the "Total" value of 10.00.
- Buttons:** A red arrow points to the "Calculate" button, and another red arrow points to the "Submit" button.

Lines Net Total	10.00
Shipping	
Tax	0.000
Tax Reference	Enter a tax reason description.
Handling	
Tax	0.000
Tax Reference	Enter a tax reason description.
Misc	
Tax	0.000
Tax Reference	Enter a tax reason description.
Total Tax	0.00
Net Total	10.00
<b>Total</b>	<b>10.00</b>


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

## Invoice Creation – Non-PO Backed

- To create a blank, non-PO backed invoice, select the tab ‘Create Blank Invoice’

Create Invoices 

Create Invoice from PO

Create Invoice from Con 

Create Blank Invoice

Create Credit Note

- A PO-Backed invoice has most of the details already added, whereas a blank non-PO backed invoice, requires all information to be manually added.

**Invoice #:** Invoice Number should be entered as the invoice details it.

**Invoice Date:** Invoice date should be entered as invoice details its.

**Payment Term:** Net Terms are a minimum of 30 days for NHCare.

**Attachments:** Please attach any back-up documents to support fast turn around and invoice approval.

**Remit-To Address:** In case of multiple payment types, you might see multiple ‘Remit-To’ and ‘Ship From’ address for the different payment types.

**Type:** Choose from Quantity or Amount. (Quantity – requires price amount per unit, unit amounts and description) (Amount – requires full itemized amount and description)

**Description:** Item description, reason for services, labor, etc.

**UOM:** Units of Measure or Quantity amount

**Price:** Price per unit of measure or quantity

**Add Line:** Add any additional lines the Invoice may have.

**Totals & Taxes:** Any shipping, handling and delivery charges are added to this section, along with any taxes, if applicable.

**Calculate:** Hit this button before submitted or saving as a draft, to make sure the invoice calculates correctly.

**Save as Draft:** Save invoice as a draft, to come back and work on later.

**Submit:** Hit this button, to submit invoice for approval.

# Create Invoice Create

## General Info

**Invoice #**

**Invoice Date** 07/18/22

**Payment Term** NET 30

\* **Currency** USD

Status Draft

Image Scan  No file selected.

Supplier Note

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

## From

\* **Supplier** \_Coupa Vendor Test Integration

Supplier Tax ID

**Invoice From Address** Coupa test supplier  
660 North Main Ave Suite 10  
San Antonio, TX 78205-1217  
United States

\* **Remit-To Address** No address selected

**Ship From Address** Coupa test supplier  
660 North Main Ave Suite 10  
San Antonio, TX 78205-1217  
United States

## To

Customer Neighborhood Healthcare

## Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
Qty		1.000	Each	0.00	0.00
PO Line	Contract	Supplier Part Number			
None					

## Totals & Taxes

Lines Net Total 0.00

**Shipping**

Tax  % 0.000

Tax Reference

**Handling**

Tax  % 0.000

Tax Reference

Misc

Tax  % 0.000

Tax Reference

**Tax**  % 0.000

Total Tax 0.00

Net Total 0.00

**Total 0.00**