

Editing an Invoice

Navigation

1. To login you will need your email address and password, once logged in you will need to select **Invoices** from the toolbar across the top
2. On the right hand side you will see the search bar, here you will be able to enter the invoice number you have created and then you will be able to edit the invoice by clicking on the pencil symbol under the Actions heading.
3. If you want you can click on the Invoice Number link that is highlighted in blue and then click on the edit button which will be located under the Gross Total amount.

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Payments Business Performance Sourcing Add-ons

Setup

Invoices Invoices Lines Payment Receipts

Select Customer John Lewis Partnership

Invoices

Instructions From Customer

Please note that Purchase Order & Invoice functionality is not yet live, but will be enabled later in 2021

Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
None	08/09/2021	Draft	None	0.00 GBP	No		

Fill in at least the mandatory fields (marked with a red asterisk) in your invoice.

If you create or edit a credit note or a PO-backed invoice, some of the fields are pre-populated with information from the original invoice or the PO.

Depending on your customer's settings, you might be required to accept the PO and the following restrictions might apply to the corresponding invoice:

- **Currency** – Cannot be changed from PO currency.
- **UOM** – Cannot be changed from PO line UOM.
- **Price** – Cannot be changed from PO line unit price.

- **Quantity** – Can be changed from 0 to the remaining quantity on the PO line.
- **Amount** – Can be changed from 0 to the remaining amount on the PO line.

These restrictions do not apply to credit notes.

Once you have decided to edit an invoice you need to 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 (Please see link to set up Legal Entities)

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Administer_the_CSP/04_Set_up_Legal_Entities

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 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.

☰ Lines Line Level Taxation

Type	Description	Price		
	Print Services	225.00	225.00 ✕	

PO Line 2819-1 🔍 Clear Pick Order Line(s) Contract Supplier Part Number UNSPSC

SF-Marketing-Indirect Select an Option

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+

➕ Add Tag

➕ Add Line ➕ Pick lines from PO

Totals & Taxes	
Lines Net Total	225.00
Lines Tax Totals	0

If you create an invoice from a PO and your customer allows you to pick lines from POs (enabling you to reference multiple POs on one invoice) and update/correct PO references on invoice lines, you can **Clear** PO lines and select PO lines from invoices by clicking on the **Pick Order Line(s)** magnifying glass (🔍) icon. In

the appearing **Pick Order Line(s)** popup, **Choose** the PO line that you want to be mapped to your invoice line.

Pick Order Line(s)
✕

Invoice Line						
Line	Type	Description	UOM	Quantity	Price	Total
1	Amount	Print Services			225.00	225.00

PO Lines

View
All ▾
Advanced
Search

Match Conditions Match all conditions ▾ Add group of conditions

Filter By PO Number ▾ Filter Clause 2819 ✕ +

Cancel Search

PO Number	Line ▲	Item	UOM	Qty	Price	Invoiced	Actions
2819	1	Print Services 1	None	None	125.00	0.00	✔ Choose
2819	2	Print Services 2	None	None	100.00	0.00	✔ Choose

You can also add PO lines from other open orders by clicking on the **Pick Lines from PO** link or the **Add** (+) icon next to it. In the appearing **Pick Lines to Add** popup, click on the **Add** (+) icon in the **Actions** column for the order line that you want to add.

Pick Lines to Add

Invoice #

Line	Desc	Total
1	Print Services	225.00 ✕

1 Lines ✕ Delete Invoice Finish

View
All ▾
Advanced
Search

PO Number	Line ▲	Description	UOM	Qty	Price	Invoiced	Actions
2814	1	Print Services	None	None	200.00	0.00	+

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

When you try to submit an invoice that does not meet your customer's requirements, depending on your customer's settings, you might get the following warning message: "This invoice has the following warning(s)", followed by details on what to correct.

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