

## Raising an Invoice against a PO

### 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. Click **Create Invoice from PO**, then under the *Actions* section click the 'Yellow Coin' symbol alongside the Purchase Order (PO) you wish to raise the Invoice against.

### Purchase Orders

#### Instructions From Customer

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

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
JLD0000000081	27/08/2021	Issued	None	1 Amount of Consulting Charges (dummy line)	No	1,000.00 GBP	

### Filling out the Invoice

#### General Info

1. Invoice Number - Must be entered.
2. Invoice Date - will automatically populate to the date of entry
3. Payment Terms - will automatically populate from the PO
4. Currency - will default to the currency of the PO
5. Delivery number - Please enter the delivery number here
6. Image Scan - Add any Delivery note images
7. Supplier Note - Please add any notes here (17 Digit Charge Code)
8. Attachments - Attach any files associated here

From


These will all automatically populate from the PO. If you have more than one Address with us then please use the magnifying glass to select your other Address.


 From


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**\* Supplier** Pricewaterhousecoopers.

**\* Supplier VAT ID**

**\* Invoice-From Address** Pricewaterhousecoopers.   
1 Hays Lane  
London  
SE1 2RD  
United Kingdom  
  
Limited Liability Partnership  
Joe Bloggs

**\* Remit-To Address** Pricewaterhousecoopers.   
1 Hays Lane  
London  
SE1 2RD  
United Kingdom

**\* Ship-From Address** Pricewaterhousecoopers.   
1 Hays Lane  
London  
SE1 2RD  
United Kingdom

To

This will all populate from the PO, the only area that requires your entry is **Tax Point Date**. *Tax Point Date cannot be future dated.*

Lines

The Lines will populate with the full order values from the PO.

If you are not invoicing for the full PO amount then please amend the **Qty** field.

Taxes Section

**VAT Rate** = Use the drop down to select the correct % or EXEMPT, REVERSE CHARGE or OUT OF SCOPE. *Remember you may only charge VAT if you are VAT registered.*

The VAT amount will automatically be calculated, you will not be able to amend this field.

**Tax reference** = Your VAT registration number.

'Add Lines', 'Pick lines from PO' & 'Pick lines from Contract' - Use these options if you wish to add invoice lines.

### Totals & Taxes

*This will show the totals for lines & VAT. You will be able to enter any shipping in this section.*

**Shipping** = enter the Net amount for the shipping here

**VAT** = Use the drop down if there is VAT to be charged as per the same rules as above.

The VAT amount will automatically be calculated, you will not be able to amend this field.

**Tax reference** = Your VAT registration number.

### Finalising the Invoice

Click **Calculate** and check the values are correct as per what you are expecting to invoice.

Click **Submit**, you will get the following warning - *'Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.'* Any other warnings will detail any errors with the invoice.

Click **Send Invoice**, you will return to your invoice homepage where you will see the invoice as a status of 'Processing'. You can use this screen to see the status of all your invoices too.

