

Creating an Invoice or Credit Note

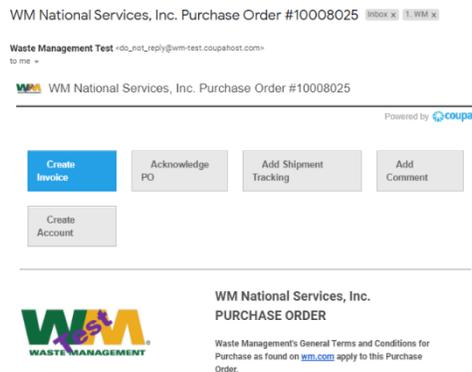
About this Guide

This guide will review the process for creating an **Invoice** or **Credit Note** in S2P-Coupa.

Creating an Invoice

Step 1a: Via Email

Click the blue **“Create Invoice”** button at the top of the email you received from Waste Management.



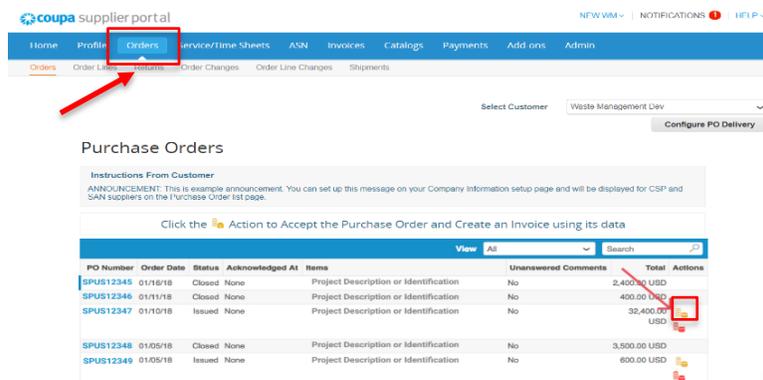
Note: Clicking the **“Acknowledge PO,”** button will notify WM that you have received the PO.

Step 1b: Via the Coupa Supplier Portal

Login to the **Coupa Supplier Portal**.

Click on the **“Orders”** tab to view **Purchase Orders** and to find the PO you need to invoice against.

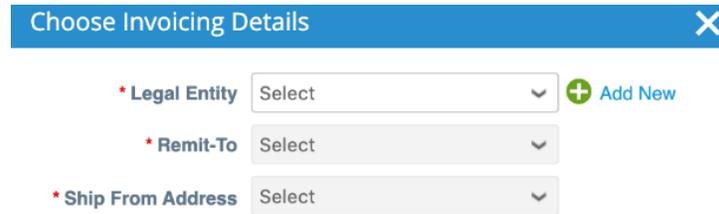
Click on the stack of **gold coins** in the **“Actions”** column OR click into the PO.



Step 2:

“Choose Invoicing Details” will appear if you have not created a Legal Entity.

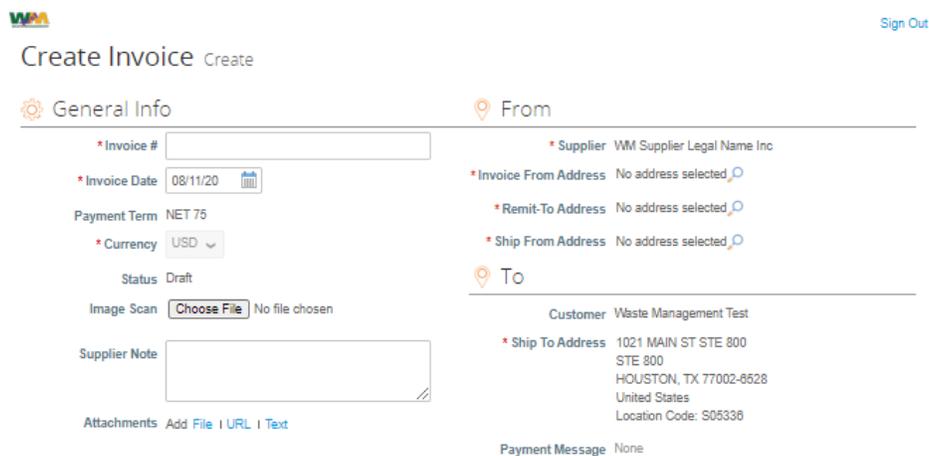
Once the Legal Entity has been created, you can select the “**Remit-To**” and “**Ship From Address**” from the dropdown and click “**Save**” at the bottom of the screen.



Step 3:

Complete the required fields noted with a **red asterisk (*)**.

Attach the **PDF Invoice** in the Attachments field.



Notes:

The Invoice number in Coupa must be **unique** and must **match the invoice number** in the attachment.

If the Invoice “**From Address**,” “**Remit-To Address**,” or “**Ship From Address**” do not **appear**, click the magnifying glass to select the respective addresses. If there is nothing to select, you have not completed the e-Invoicing setup.

If there are multiple invoices for a Purchase Order, they must be **submitted separately**.

Step 4:

If you need to **delete a Purchase Order line** or you are invoicing against a Purchase Order with multiple lines, please click on **the red X** next to the line you are not using.

Adjust the **“Price”** field to reflect the desired billing amount.

Note: If you are not invoicing for the entire Purchase Order, you must **delete unused lines**.

Lines Line Level Taxation

Type	Description	Price	
	VM PO Item	500.00	500.00

PO Line	Contract	Period	Supplier Part Number
10008025-1	<input type="text"/>	<input type="text"/>	<input type="text"/>

Billing
K00033-01700-900-678200-9922

Add Tag

Add Line

Step 5a:

Enter the Tax Amount under the **“Tax”** field at the bottom of the screen.

Click **“Calculate”** to calculate the total price including Tax.

Click **“Submit”** once complete.

Totals & Taxes

Lines Net Total	500.00
Shipping	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> <input type="text"/> % <input type="text"/>
Total Tax	0.00
Net Total	500.00
Total	500.00

Email me status updates for invoices I create this way

Delete

Cancel

Save as Draft

Calculate

Submit

Step 5b:

If there is line level taxation, you can input the Tax per Purchase Order line by checking the “**Line Level Taxation**” checkbox.

A Tax box will appear on the individual PO line where you will enter the “**Tax Rate.**”

The screenshot shows the 'Lines' section of the Coupa interface. At the top right, the 'Line Level Taxation' checkbox is checked. The main form contains the following fields:

- Type:
- Description: WM PO Item
- Price: 500.00
- PO Line: 10008025-1
- Contract:
- Period:
- Supplier Part Number:
- Billing: K00033-01700-900-678200-9922
- Taxes: A table with columns for Tax Description, Tax Rate, Tax Amount, and Tax Reference.

At the bottom, there is an 'Add Tag' button and an 'Add Line' button.

Creating a Credit Note

Step 1:

Login to the **Coupa Supplier Portal**.

Click on the “**Orders**” tab to view **Purchase Orders** and find the PO you need to apply a Credit Note.

Click on the stack of **red coins** in the “**Actions**” column OR click into the PO.

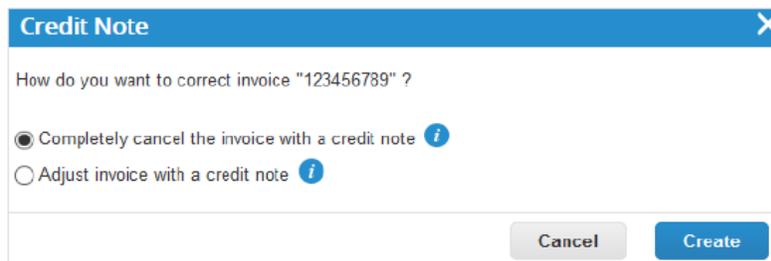
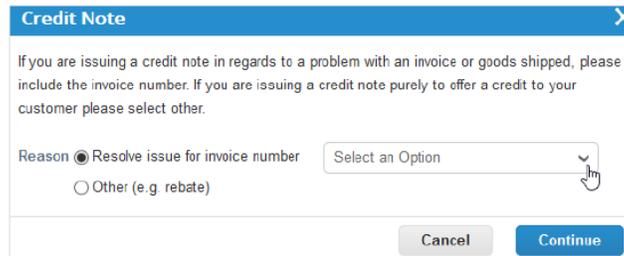
The screenshot shows the Coupa Supplier Portal interface. The 'Orders' tab is selected in the navigation menu. Below the navigation, there is a 'Purchase Orders' section with an announcement and a table of orders.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
SPUS12345	01/16/18	Closed	None	Project Description or Identification	No	2,400.00 USD	
SPUS12346	01/11/18	Closed	None	Project Description or Identification	No	400.00 USD	
SPUS12347	01/10/18	Issued	None	Project Description or Identification	No	32,400.00 USD	
SPUS12348	01/05/18	Closed	None	Project Description or Identification	No	3,500.00 USD	
SPUS12349	01/05/18	Issued	None	Project Description or Identification	No	600.00 USD	

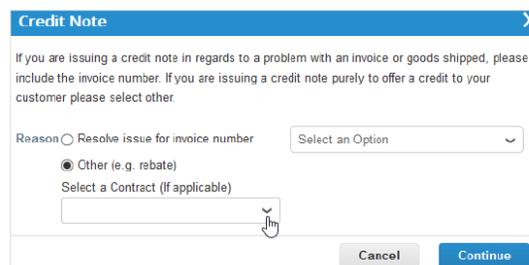
Step 2:

A screen will appear prompting you to select a **reason** for the Credit Note.

If the Credit Note is related to a problem with an Invoice or the goods shipped, select **“Resolve issue for invoice number,”** choose the invoice number from the dropdown menu, and click **“Continue”** to select how you want to resolve the issue.



To record a credit, select **“Other,”** and click **“Continue”** to select a contract, if available.



Step 3:

Coupa will redirect you to the **Credit Note page** where you can create the Credit Note similarly to creating an Invoice.

You will notice that many of the fields have been pre-populated and are not editable as this information is carried over from the initial invoice.

If you have a **PDF credit note**, please **attach it** to the Credit Note.

Click **“Submit,”** confirm the information, then click **“Send.”**