



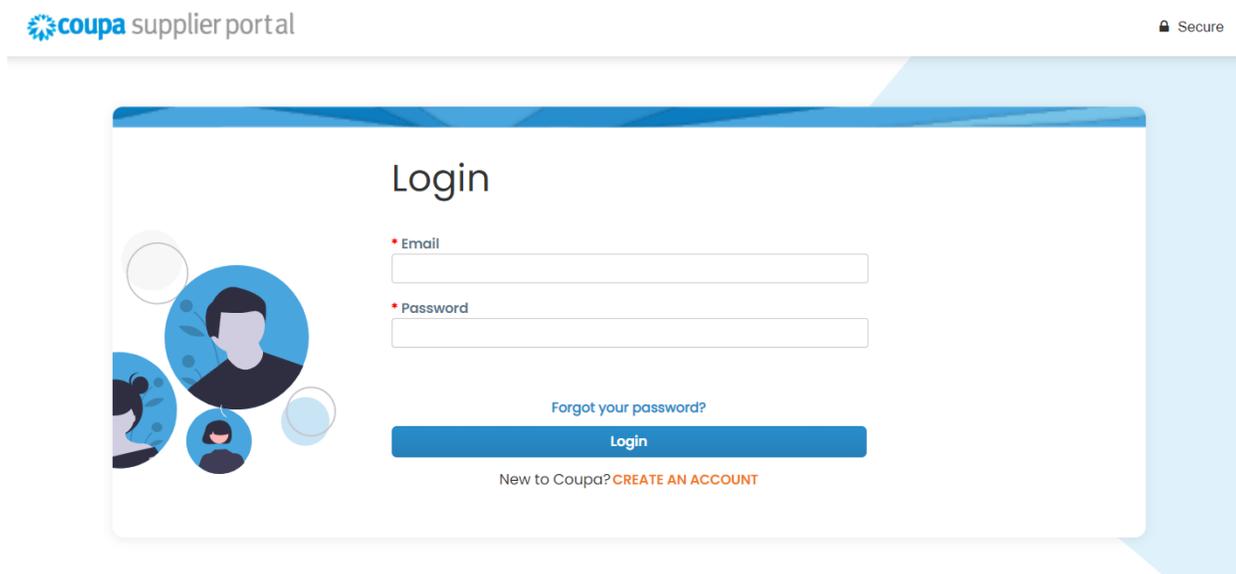
# CREATE AN INVOICE OR A CREDIT NOTE

How To Guide

One of the primary advantages of the Coupa Supplier Portal is the ability to create an invoice or a credit note and submit it electronically to Organon for payment.

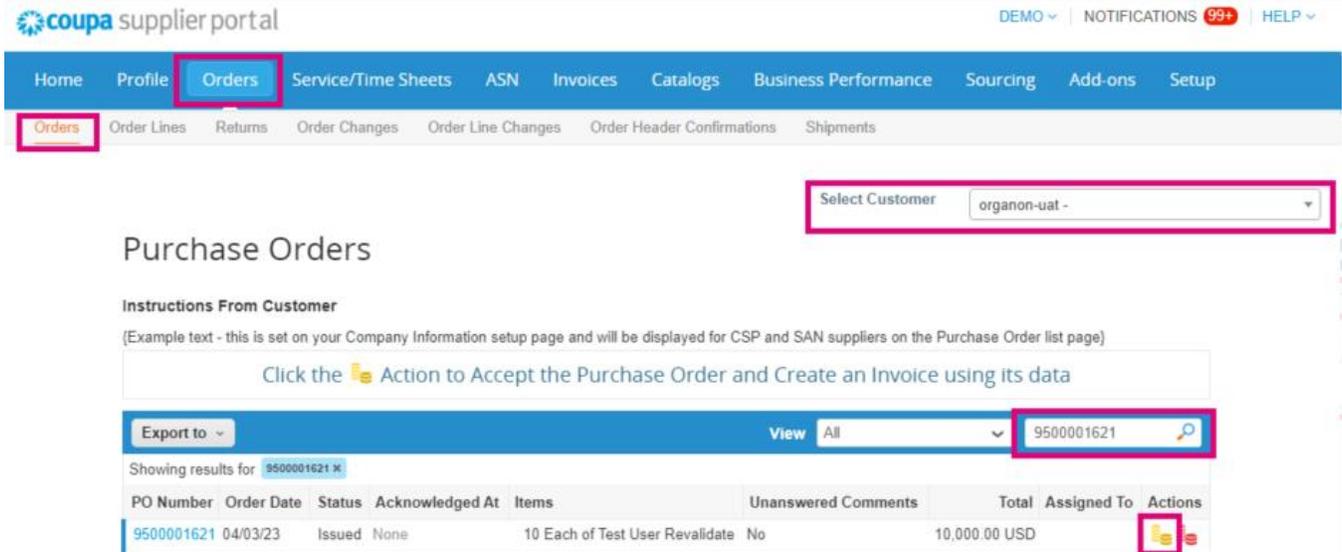
## How to Create an Invoice

1. Log in to the Coupa Supplier Portal with **Email** and **Password**

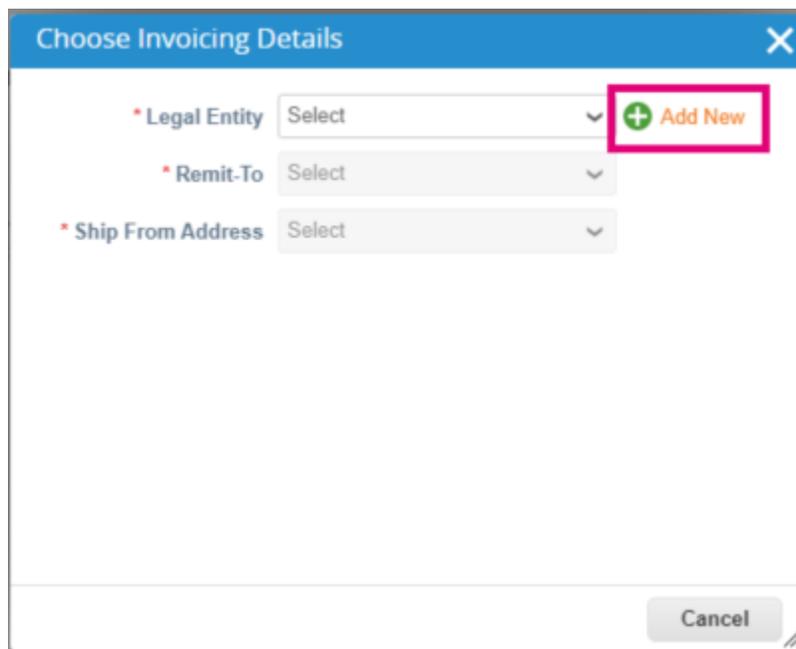


The screenshot shows the Coupa Supplier Portal login interface. At the top left, it says "coupa supplier portal" with a lock icon and the word "Secure" on the right. The main content area is titled "Login" and features a graphic of three stylized people icons on the left. The login form includes two input fields: "Email" and "Password", both with red asterisks indicating required fields. Below the fields is a blue button labeled "Login" and a link for "Forgot your password?". At the bottom, there is a link that says "New to Coupa? CREATE AN ACCOUNT".

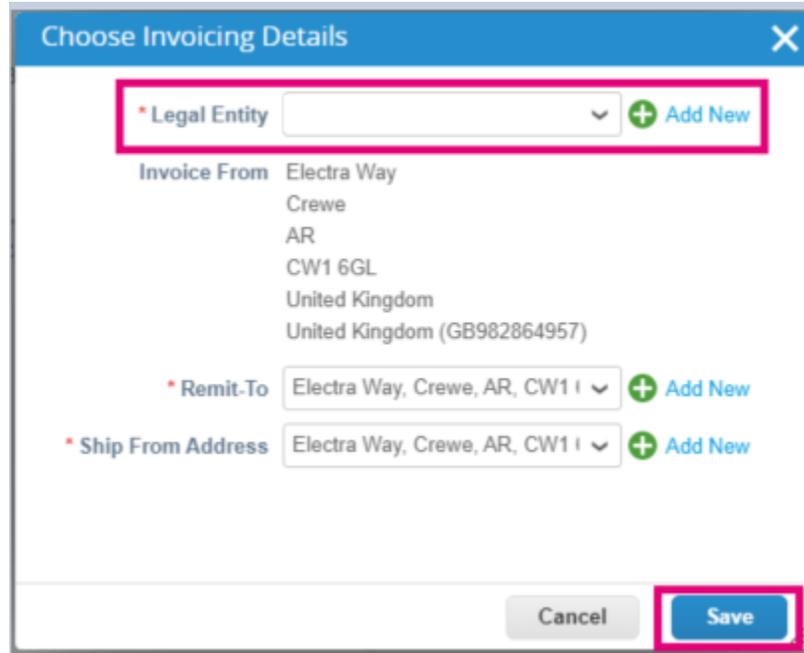
2. Select **Orders, Select Customer**, use the search bar to find a specific PO, click on the stack of gold coins in the **Actions** column OR click on the PO number



3. If the invoicing details are missing, you will have the option to add them by selecting **Add New**. You can find additional details on how to do this by accessing the “How to Set Up Legal Entities” Guide.



4. Once the Legal Entity has been created, select it from the dropdown and click **Save**



Choose Invoicing Details

\* Legal Entity  + Add New

Invoice From Electra Way  
Crewe  
AR  
CW1 6GL  
United Kingdom  
United Kingdom (GB982864957)

\* Remit-To Electra Way, Crewe, AR, CW1 | + Add New

\* Ship From Address Electra Way, Crewe, AR, CW1 | + Add New

Cancel Save

5. Complete the required fields noted with a red asterisk (\*) and attach the PDF legal invoice in the Attachments field if you are not part of a **Coupa Compliance-as-a-Service (CaaS)** delivery model Country. If you are part of a **Coupa Compliance-as-a-Service (CaaS)** delivery model Country:
- Coupa validates the invoice data as per the Vendor country's tax registration
  - Coupa creates a PDF invoice on behalf of the Vendor.
  - The Coupa Platform issues a legal invoice by digitally signing the PDF on behalf of the Vendor
  - The legal invoice is received by Organon and made available to the Vendor for download

**Coupa Compliance-as-a-Service (CaaS)** countries are : Australia, Austria, Bahrain, Bangladesh, Belgium, Brazil, Bulgaria, Canada, China, Colombia, Croatia, Czech Republic, Denmark, Estonia,

Finland, France, Germany, Greece, Hong Kong, Hungary, India, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Malaysia, Malta, Mexico, Montenegro, Myanmar, Namibia, Netherlands, New Zealand, Norway, Pakistan, Poland, Romania, Serbia, Singapore, Slovakia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, UK, United Arab Emirates, USA

Select Customer

### Create Invoice Create

#### General Info

- \* Invoice #
- \* Invoice Date
- Payment Term Z507-Within 30 days from invoice date due net
- Date of Supply
- \* Currency
- Delivery Number
- Status
- Shipping Term
- Supplier Note
- Attachments [Add File](#) | [URL](#) | [Text](#)
- Discount Amount
- Cash Accounting Scheme
- Margin Scheme

#### From

- \* Supplier
- \* Supplier VAT IC
- \* Invoice From Address
- \* Remit-To Address
- \* Ship From Address

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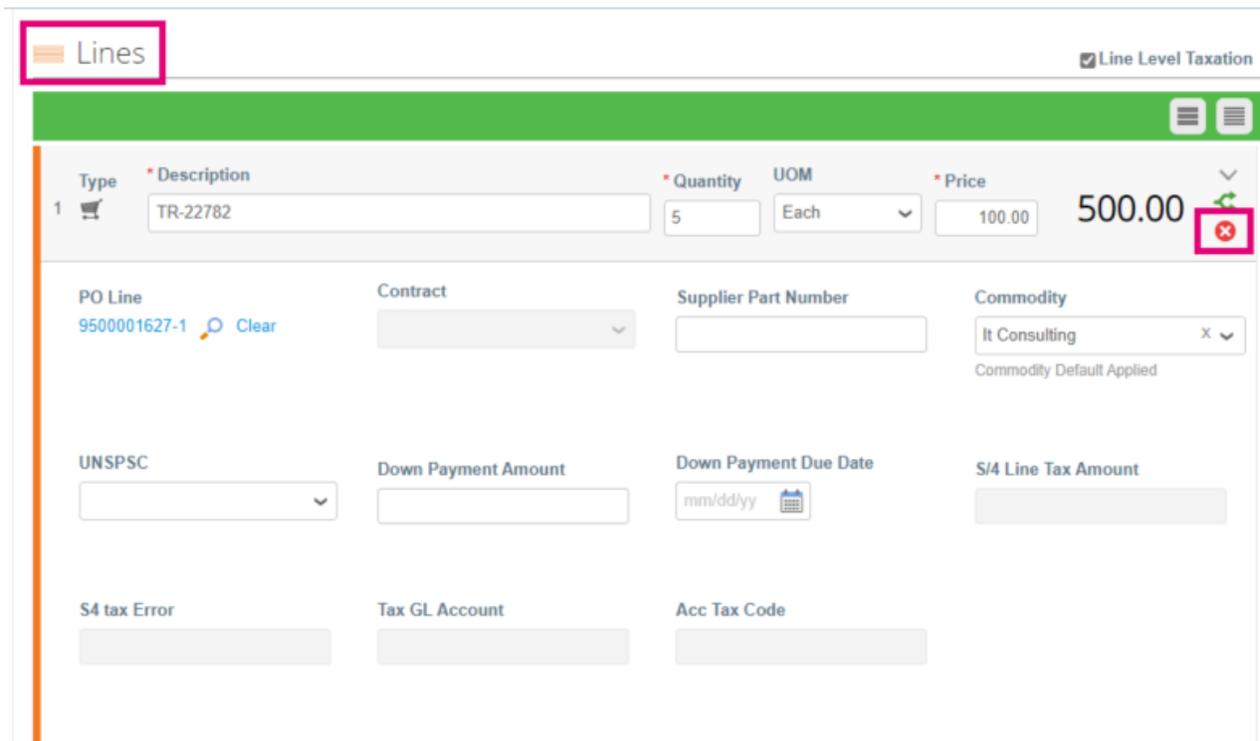
#### To

- Customer
- \* Bill To Address   
The Hewett Building  
14 Hewett St.  
London  
EC2A 3NP  
United Kingdom
- \* Buyer VAT ID
- Ship To Address   
CRAMLINGTON  
NE23 3JU  
United Kingdom  
Location Code: 1010
- Country of Origin

**Note:** The Invoice number in Coupa must be unique and must match the invoice number in the attachment. If the addresses in “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.

6. 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 would like to remove.



**Lines** Line Level Taxation

Type	Description	Quantity	UOM	Price	Total	
1	TR-22782	5	Each	100.00	500.00	

PO Line: 9500001627-1 Clear
 Contract: 
 Supplier Part Number: 
 Commodity: It Consulting x

UNSPSC: 
 Down Payment Amount: 
 Down Payment Due Date:  
 S/4 Line Tax Amount:

S4 tax Error: 
 Tax GL Account: 
 Acc Tax Code:

7. Adjust the **Quantity** or **Price** field (depending on how the PO was created) to reflect the billing amount

Lines ☑ Line Level Taxation

Type	Description	Quantity	UOM	Price	
1	TR-22782	5	Each	100.00	500.00

PO Line: 9500001627-1 [Clear](#) Contract:  Supplier Part Number:  Commodity: It Consulting  Commodity Default Applied

**Note:** If you are not invoicing for the entire Purchase Order, you must delete all the unused lines, including the lines having 0.00 amount/quantity.

8. Enter the Tax Amount under the **Tax** field at the bottom of the screen and click **Calculate** to calculate the total price including Tax. Once the VAT is calculated, you are ready to send the invoice to Organon by clicking the **Submit** button.

**Totals & Taxes**

Lines Net Total	9,000.00
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
<input type="checkbox"/> Tax Reference	<input type="text" value="Enter a tax reason description."/>
Handling	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
<input type="checkbox"/> Tax Reference	<input type="text" value="Enter a tax reason description."/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
<input type="checkbox"/>	
Total Tax	0.00
Net Total	9,000.00
<b>Total</b>	<b>9,000.00</b>

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**.

Lines

Line Level Taxation

Type	Description	Qty	UOM	Price	
	Test User Revalidate	9	Each	1,000.00	9,000.00 

PO Line	Service/Time Sheet Line	Contract	Supplier Part Number
9500001621-1	None		<input type="text"/>

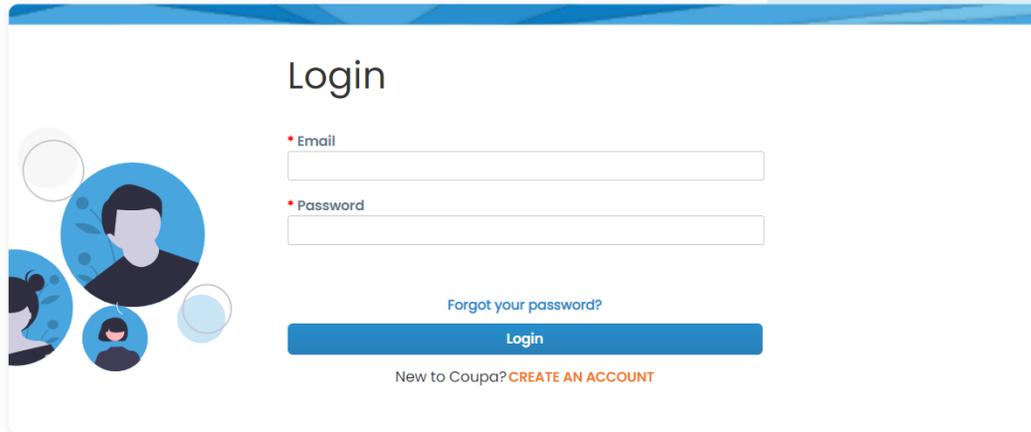
Billing  
1007\_UNITED KINGDOM-62002301-10071189

Taxes

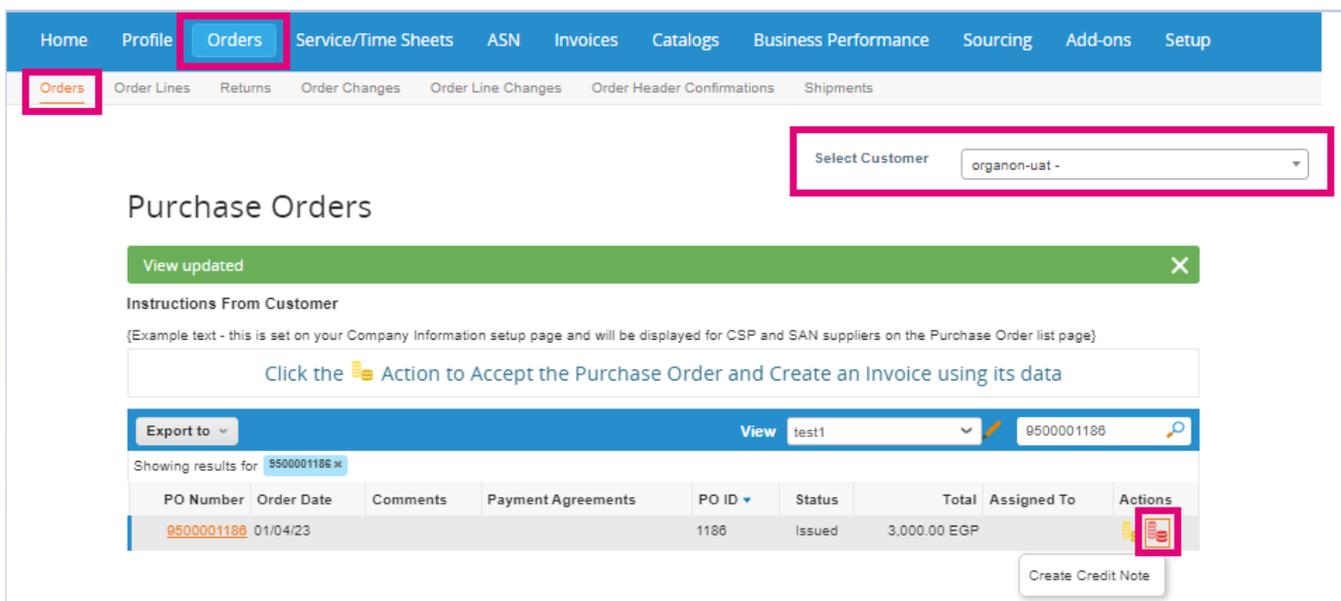
Tax Description	Tax Rate	Tax Amount	Tax Reference
	<input type="text"/>	0.00	<input type="text"/> 

## How to Create a Credit Note

1. Log in to the Coupa Supplier Portal with **Email** and **Password**



2. If you want to create a Credit Note, you have multiple possibilities to do so.
  - a. Select **Orders**, **Select Customer**, use the search bar to find a specific PO, click on the stack of red coins in the **Actions** column OR click on the PO number



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

**Orders** Order Lines Returns Order Changes Order Line Changes Order Header Confirmations Shipments

Select Customer organon-uat -

### Purchase Orders

View updated

**Instructions From Customer**  
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

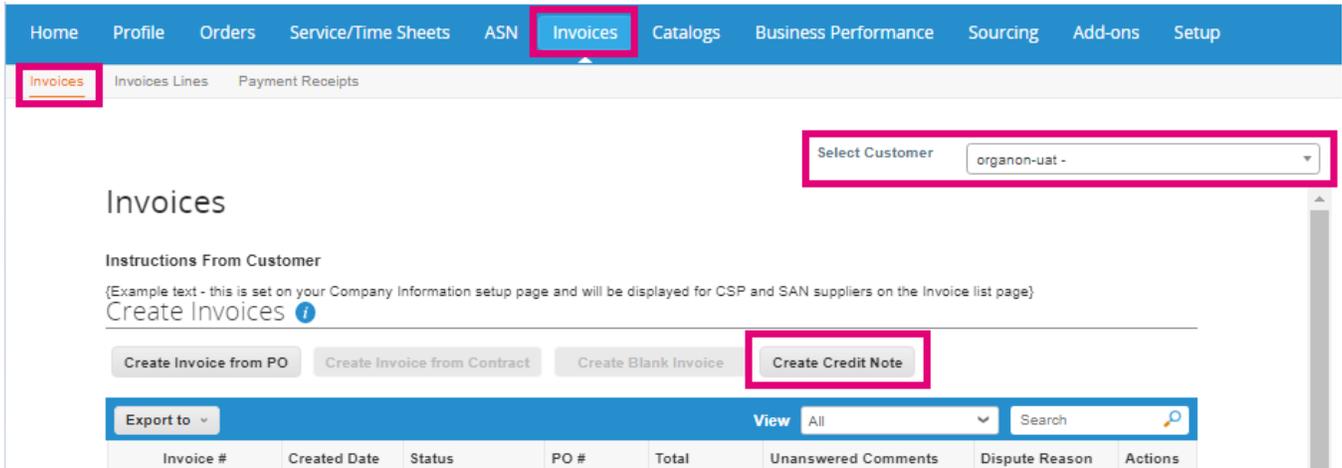
Export to View test1 9500001186

Showing results for 9500001186 x

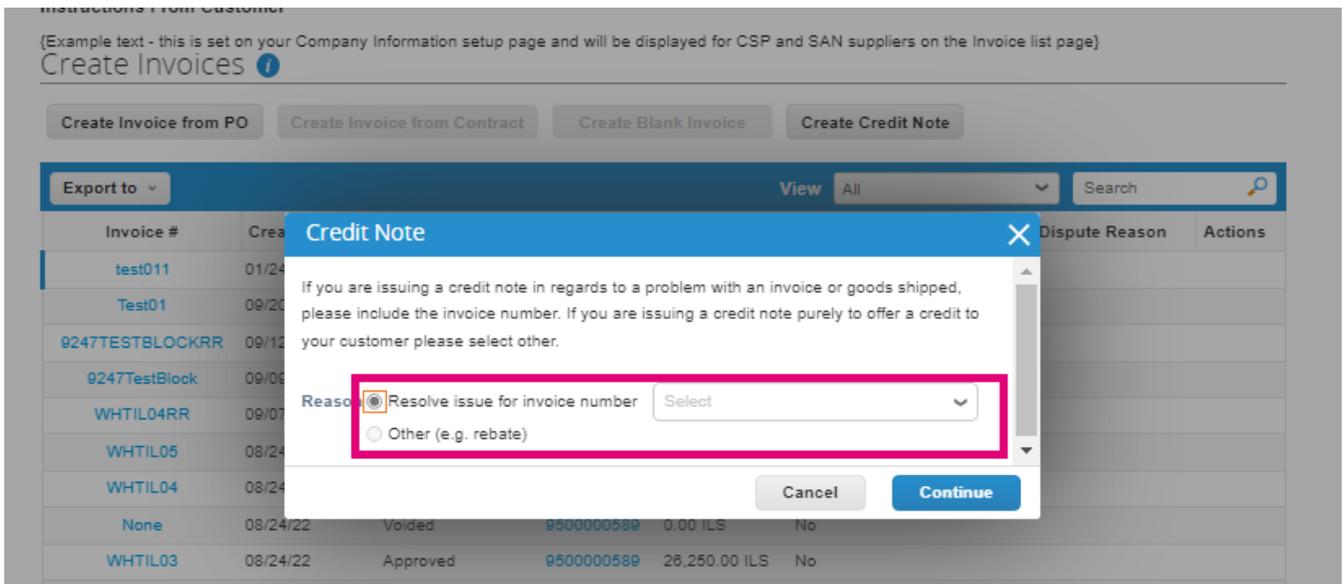
PO Number	Order Date	Comments	Payment Agreements	PO ID	Status	Total	Assigned To	Actions
9500001186	01/04/23			1186	Issued	3,000.00 EGP		

Create Credit Note

**b. Select **Invoices**, **Select Customer** and click on **Create Credit Note****

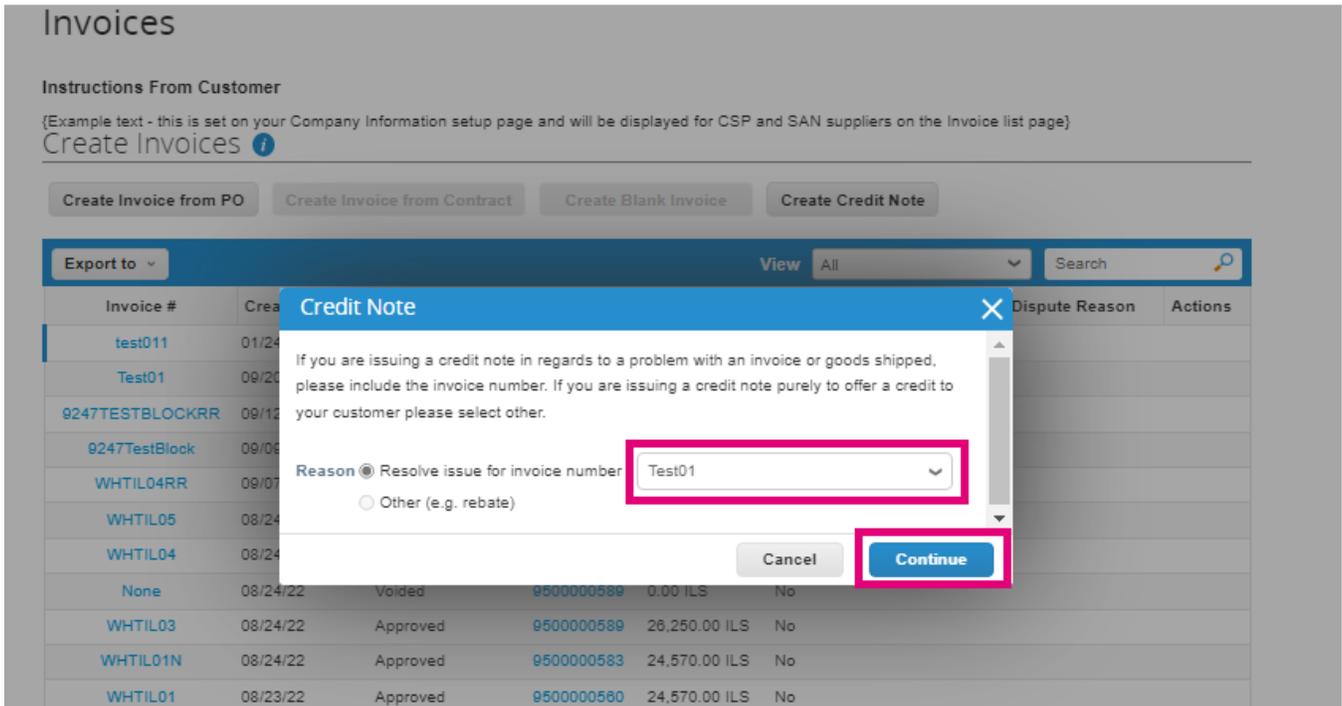


A pop-up message will appear where you will be asked to either choose to **Resolve issue for invoice number** or **Other**



If you must submit a Credit Note for a specific Invoice, select **Resolve issue for invoice number**, choose the invoice number from the

dropdown list, and click **Continue** to select how you want to correct the invoice.



**Invoices**

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices ⓘ

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

Export to   View All   Search

Invoice #	Create	Status	Amount	Dispute Reason	Actions
test011	01/24				
Test01	09/20				
9247TESTBLOCKRR	09/13				
9247TestBlock	09/08				
WHTIL04RR	09/07				
WHTIL05	08/24				
WHTIL04	08/24				
None	08/24/22	Voided	9500000589	0.00 ILS	No
WHTIL03	08/24/22	Approved	9500000589	26,250.00 ILS	No
WHTIL01N	08/24/22	Approved	9500000583	24,570.00 ILS	No
WHTIL01	08/23/22	Approved	9500000580	24,570.00 ILS	No

### Invoices

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

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 #	Total	Unanswered Comments	Dispute Reason	Actions
test011	01/24						
Test01	09/20						
9247TESTBLOCKRR	09/12						
9247TestBlock	09/08						
WHTIL04RR	09/01						
WHTIL05	08/24						
WHTIL04	08/24/22	Approved	9500000589	24,570.00 ILS	No		
None	08/24/22	Voided	9500000589	0.00 ILS	No		
WHTIL03	08/24/22	Approved	9500000589	26,250.00 ILS	No		
WHTIL01N	08/24/22	Approved	9500000583	24,570.00 ILS	No		
WHTIL01	08/23/22	Approved	9500000560	24,570.00 ILS	No		

Per page 15 | 45 | 90

#### Credit Note

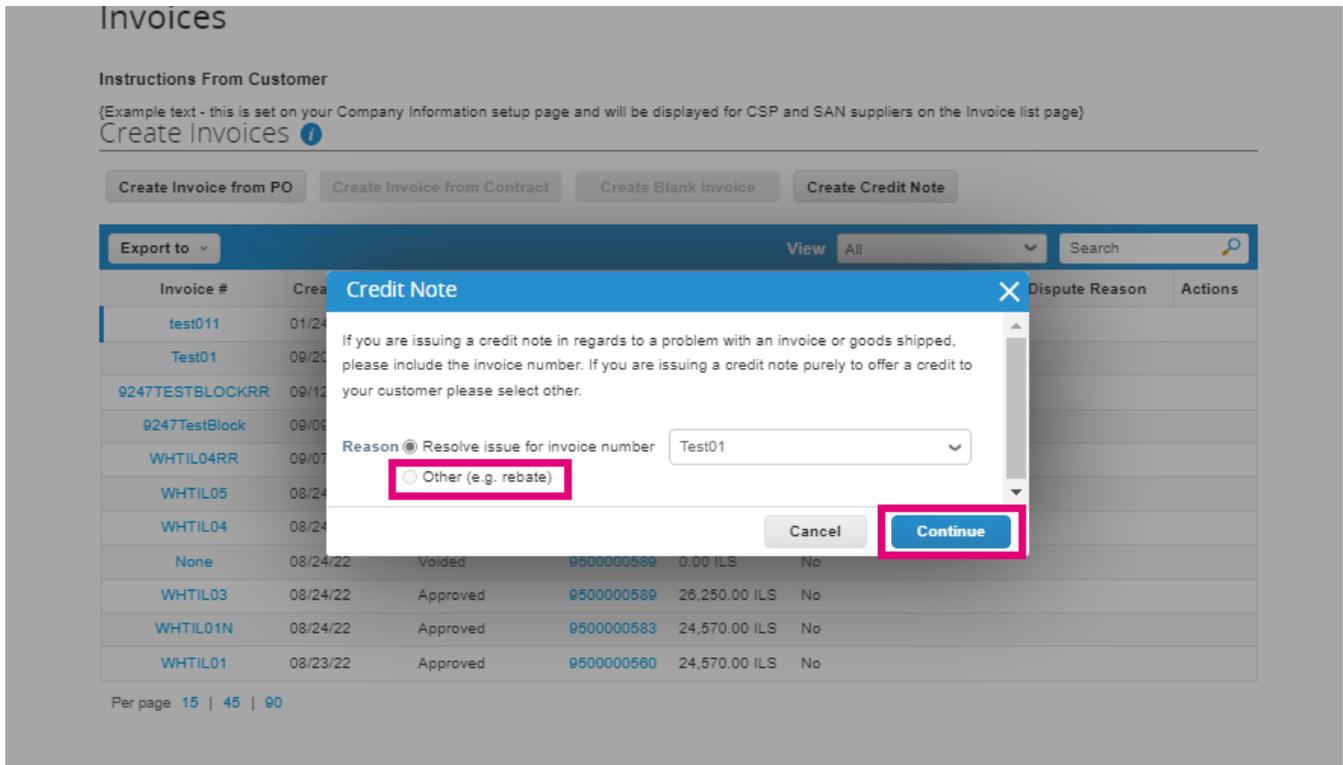
How do you want to correct invoice "Test01" ?

Completely cancel the invoice with a credit note ?

Adjust invoice with a credit note ?

Cancel   Create

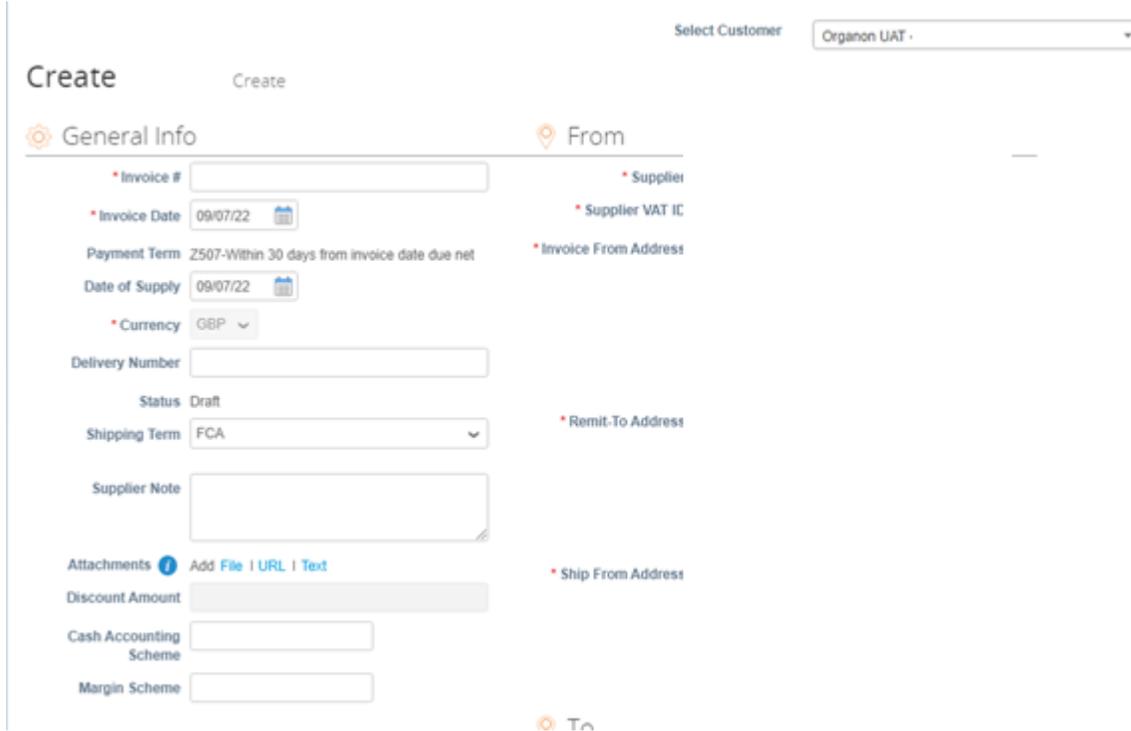
**Note:** If you don't have an exact invoice number, choose the **Other** (e.g., **rebate**) option from the screen.



3. Complete the required fields noted with a red asterisk (\*) and attach the PDF legal invoice in the Attachments field if you are not part of a **Coupa Compliance-as-a-Service (CaaS)** delivery model Country. If you are part of a **Coupa Compliance-as-a-Service (CaaS)** delivery model Country:

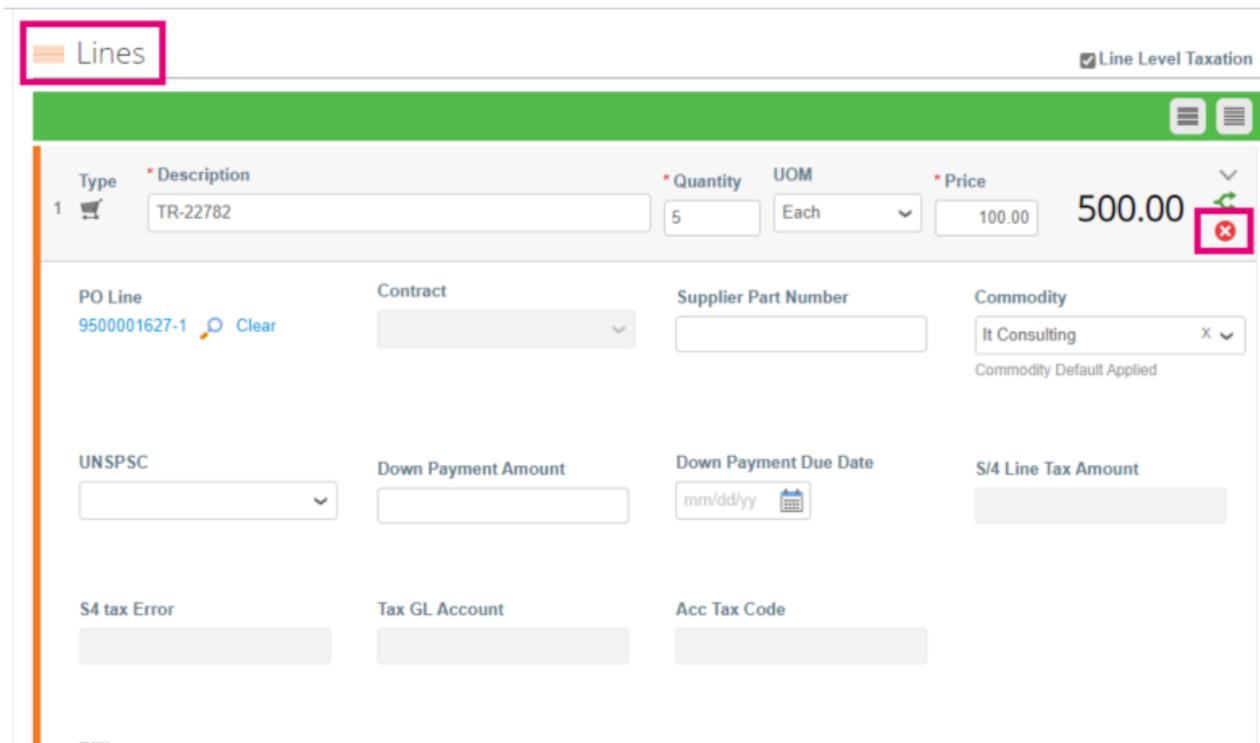
- Coupa validates the invoice data as per the Vendor country's tax registration
- Coupa creates a PDF invoice on behalf of the Vendor.
- The Coupa Platform issues a legal invoice by digitally signing the PDF on behalf of the Vendor
- The legal invoice is received by Organon and made available to the Vendor for download

**Coupa Compliance-as-a-Service (CaaS)** countries are : Australia, Austria, Bahrain, Bangladesh, Belgium, Brazil, Bulgaria, Canada, China, Colombia, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Malaysia, Malta, Mexico, Montenegro, Myanmar, Namibia, Netherlands, New Zealand, Norway, Pakistan, Poland, Romania, Serbia, Singapore, Slovakia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, UK, United Arab Emirates, USA



**Note:** The Invoice number in Coupa must be unique and must match the invoice number in the attachment. If the addresses in “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.

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 would like to remove.



The screenshot shows a software interface for managing Purchase Order lines. At the top, there is a tab labeled "Lines" which is highlighted with a red box. To the right of the tab, there is a checkbox for "Line Level Taxation" which is checked. Below the tab is a green header bar with two menu icons. The main content area contains a table with the following columns: "Type", "Description", "Quantity", "UOM", "Price", and a total price. The table has one row with the following values: "1" (with a shopping cart icon), "TR-22782", "5", "Each", "100.00", and "500.00". A red box highlights a red "X" icon next to the "500.00" price. Below the table, there are several input fields: "PO Line" (9500001627-1 with a "Clear" button), "Contract" (dropdown), "Supplier Part Number" (text input), "Commodity" (It Consulting with a dropdown and "Commodity Default Applied" text), "UNSPSC" (dropdown), "Down Payment Amount" (text input), "Down Payment Due Date" (calendar icon), "S/4 Line Tax Amount" (text input), "S4 tax Error" (text input), "Tax GL Account" (text input), and "Acc Tax Code" (text input).

5. Adjust the **Quantity** or **Price** field (depending on how the PO was created) to reflect the billing amount

Lines ☑ Line Level Taxation

Type	Description	Quantity	UOM	Price	
1	TR-22782	5	Each	100.00	500.00

PO Line: 9500001627-1 [Clear](#) Contract:  Supplier Part Number:  Commodity: It Consulting  Commodity Default Applied

**Note:** If you are not invoicing for the entire Purchase Order, you must delete all the unused lines, including the lines having 0.00 amount/quantity.

6. Enter the Tax Amount under the **Tax** field at the bottom of the screen and click **Calculate** to calculate the total price including Tax. Once the VAT is calculated, you are ready to send the invoice to Organon by clicking the **Submit** button.

**Totals & Taxes**

Lines Net Total	9,000.00
<hr/>	
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
 Tax Reference	<input type="text" value="Enter a tax reason description."/>
<hr/>	
Handling	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
 Tax Reference	<input type="text" value="Enter a tax reason description."/>
<hr/>	
Tax	<input type="text"/> % <input type="text" value="0.000"/>
	
<hr/>	
Total Tax	0.00
Net Total	9,000.00
<b>Total</b>	<b>9,000.00</b>

Delete Cancel Save as Draft Calculate **Submit**