



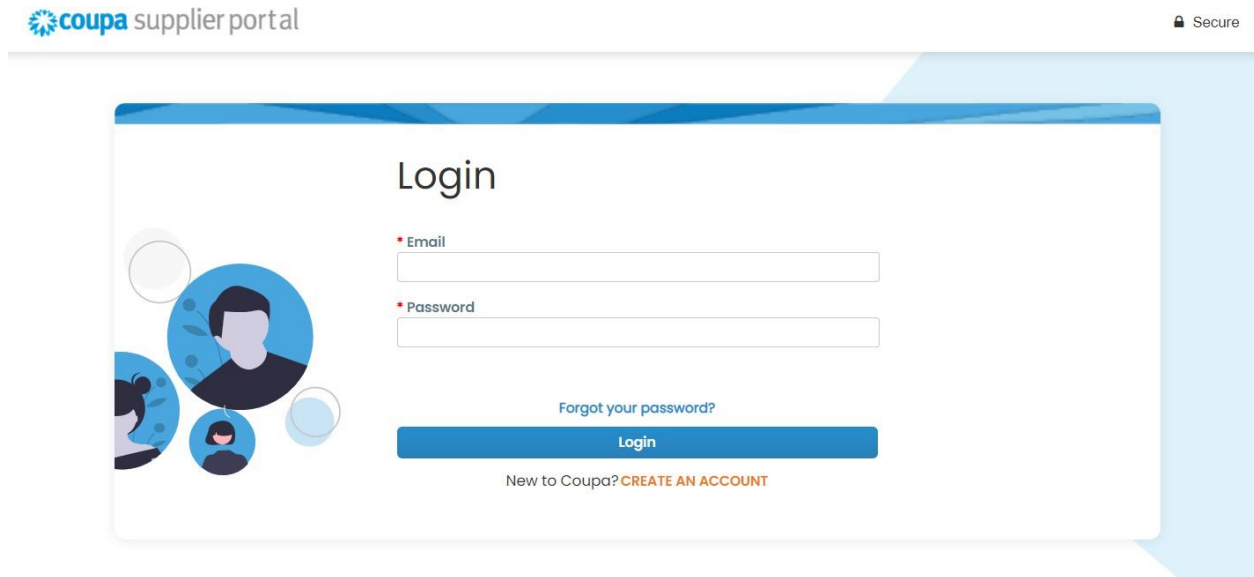
CREATE AN INVOICE OR A CREDIT NOTE

How To Guide

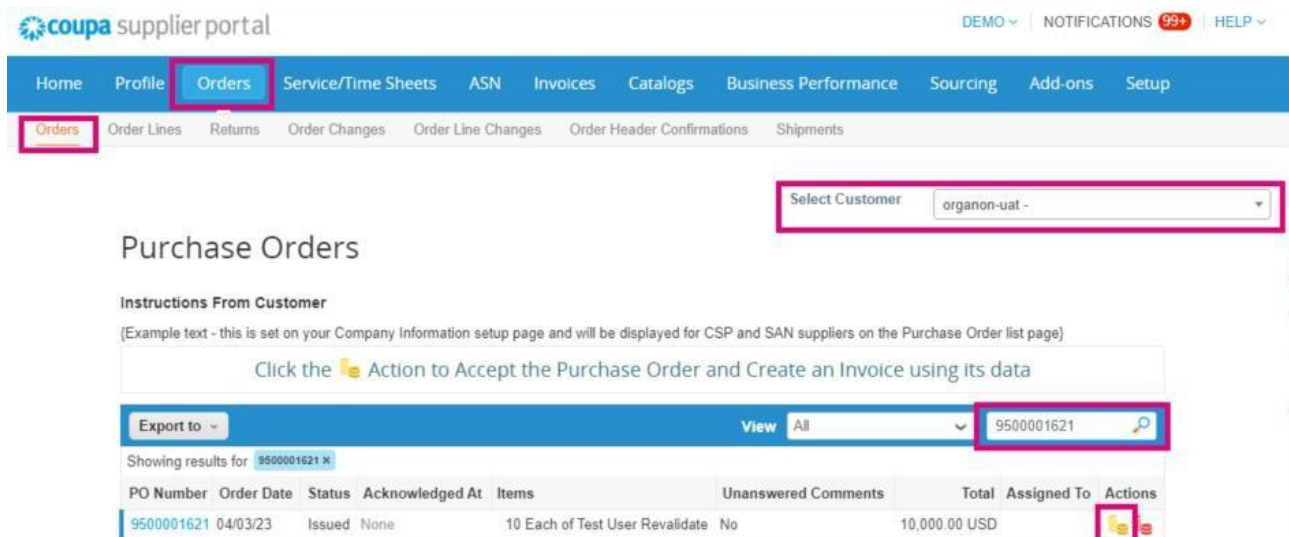
One of the primary advantages of the Coupa Supplier Portal is the ability to create an invoice or a credit note and submit it electronically to Organon for payment.

How to Create an Invoice

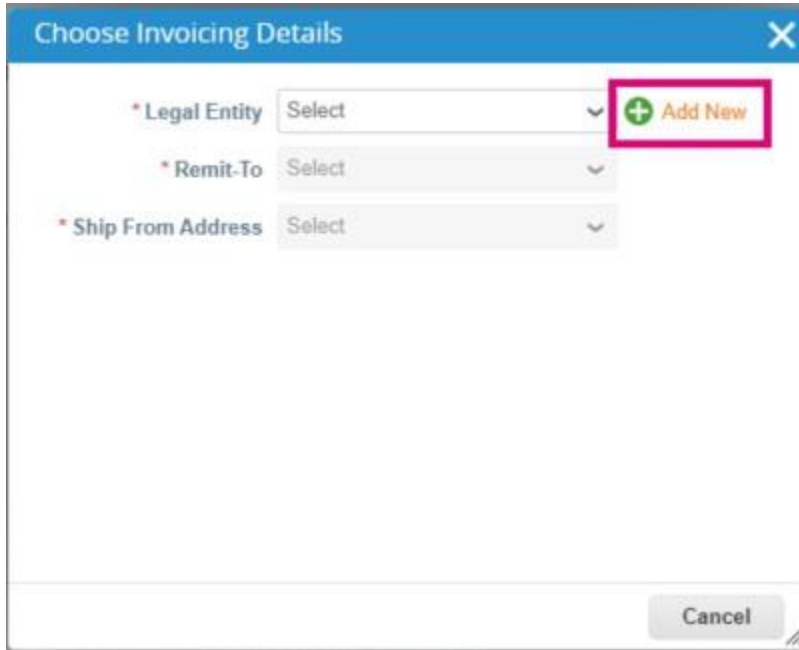
1. Log in to the Coupa Supplier Portal with **Email** and **Password**



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.



Choose Invoicing Details

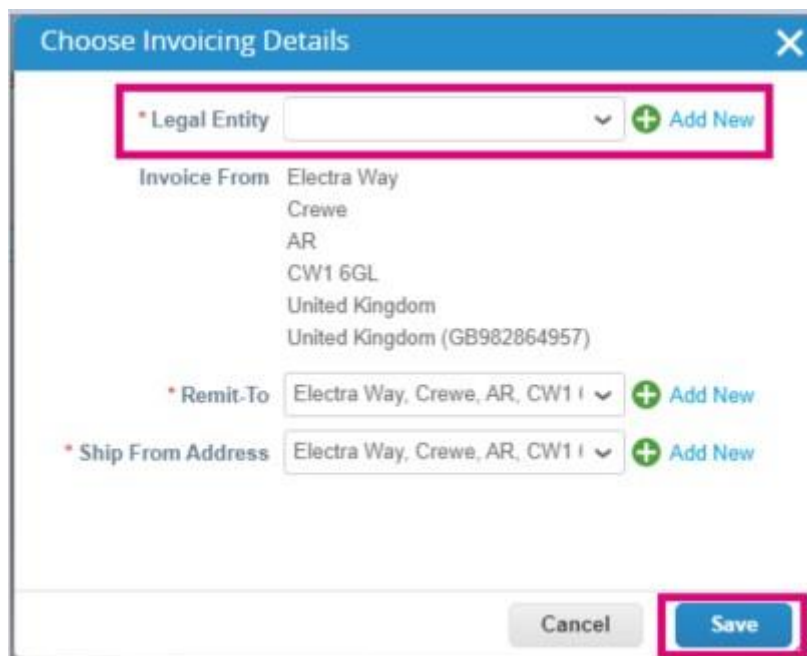
* Legal Entity Select **+ Add New**

* Remit-To Select

* Ship From Address Select

Cancel

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: Organon UAT

Create Invoice Create

General Info

* Invoice #

* Invoice Date 09/07/22

Payment Terms 2507 within 30 days from invoice date due net

Date of Supply 09/07/22

* Currency GBP

Delivery Number

Status Draft

Shipping Term FCA

Supplier Note

Attachments Add File | URL | Text

Discount Amount

Cash Accounting Scheme

Margin Scheme

From

* Supplier

* Supplier VAT IE

* Invoice From Address

* Remit-To Address

* Ship From Address

To

Customer Organon UAT

* Bill To Address Organon Pharma (UK) Limited
The Hewett Building
14 Hewett St
London
EC2A 3NP
United Kingdom


* Buyer VAT ID GB213713204

Ship To Address SHOTTON LANE
CRAMLINGTON
NE23 3JU
United Kingdom
Location Code 1010

Invoice of Order

Note: The **Invoice number** and **date** in Coupa must be an **exact match** with the ones present on the **actual invoice** otherwise the invoice will be rejected by the Invoice Processing team (for more details please visit the Best Practices for Compliance guide). 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.

Note: For Norway, Denmark, Poland and Korea “Payment Order Reference” field is **mandatory**.

 supplier portal NOTIFICATIONS **6** | HELP



[Invoices](#) | [Orders](#) | [Business Profile](#) | [Setup](#) | [Service Sheets](#) | [ASN](#) | [Sourcing](#) | [Forecasts](#) | [Catalogues](#) | [Workers](#) | [More...](#)

[Invoices](#) | [Invoices Lines](#) | [Payment Receipts](#)

Select customer

Create Invoice Create




Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold. X


 General Info	 From
* Invoice # <input type="text"/>	* Supplier 0001005726-WWT EMEA UK LIMITED
* Invoice Date <input type="text" value="27/01/2025"/>	* Supplier VAT ID <input type="text" value="GB675121247"/>
Payment Term Z511-Within 90 days from invoice date, due net	* Invoice-From Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom LTD"/>
Date of Supply <input type="text" value="27/01/2025"/>	* Remit-To Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom"/>
* Currency <input type="text" value="EUR"/>	* Ship-From Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom"/>
Delivery Number <input type="text"/>	
Status <input type="text" value="Draft"/>	
Shipping Term <input type="text" value="DAP"/>	
Supplier Note <input type="text"/>	
Attachments <input type="text" value="Add File URL Text"/>	
Discount Amount <input type="text"/>	
Payment Order Reference <input type="text"/>	
Cash Accounting <input type="text"/>	

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** 500.00

1  TR-22782 5 Each 100.00  

PO Line 9500001627-1  Clear


Contract

Supplier Part Number

Commodity It Consulting 
Commodity Default Applied

UNSPSC

Down Payment Amount

Down Payment Due Date mm/dd/yy 

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 x

Commodity Default Applied

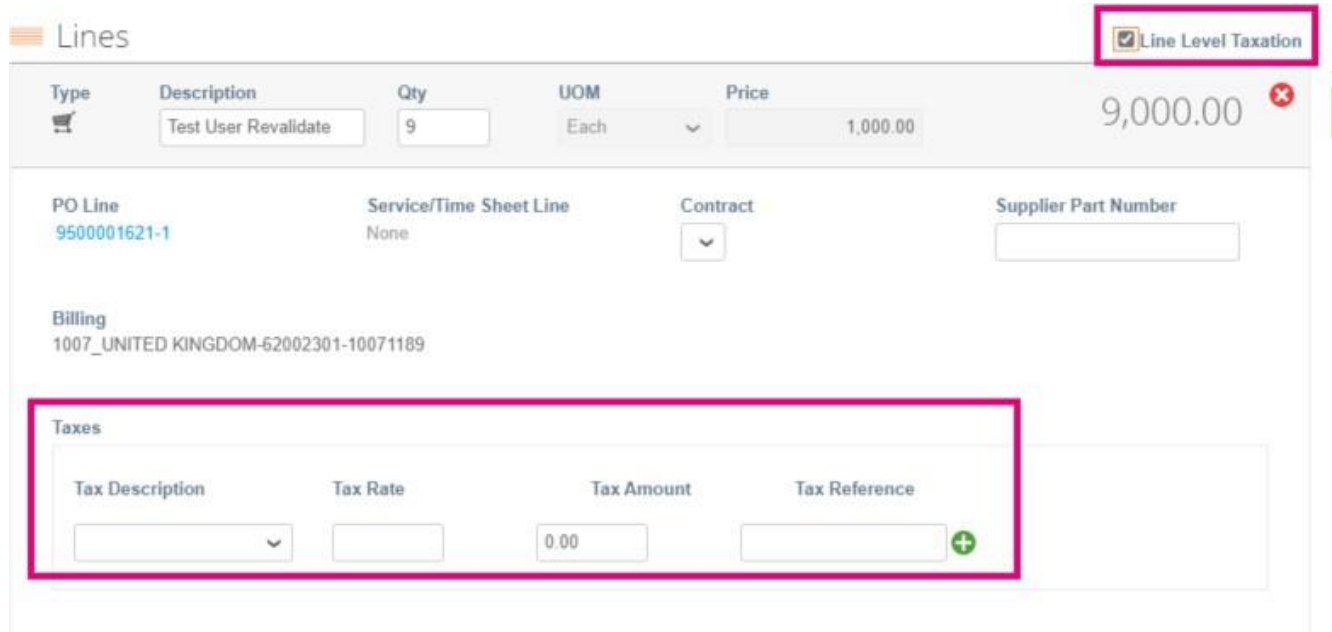
Note: If you are not invoicing for the entire Purchase Order, you must delete all the unused lines, including the lines having 0.00 amount/quantity.

- 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"/> 0.000
+ Tax Reference	<input type="text"/> Enter a tax reason description.
Handling	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
+ Tax Reference	<input type="text"/> Enter a tax reason description.
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.000
+ Tax Reference	<input type="text"/>
Total Tax	0.00
Net Total	9,000.00
Total	9,000.00

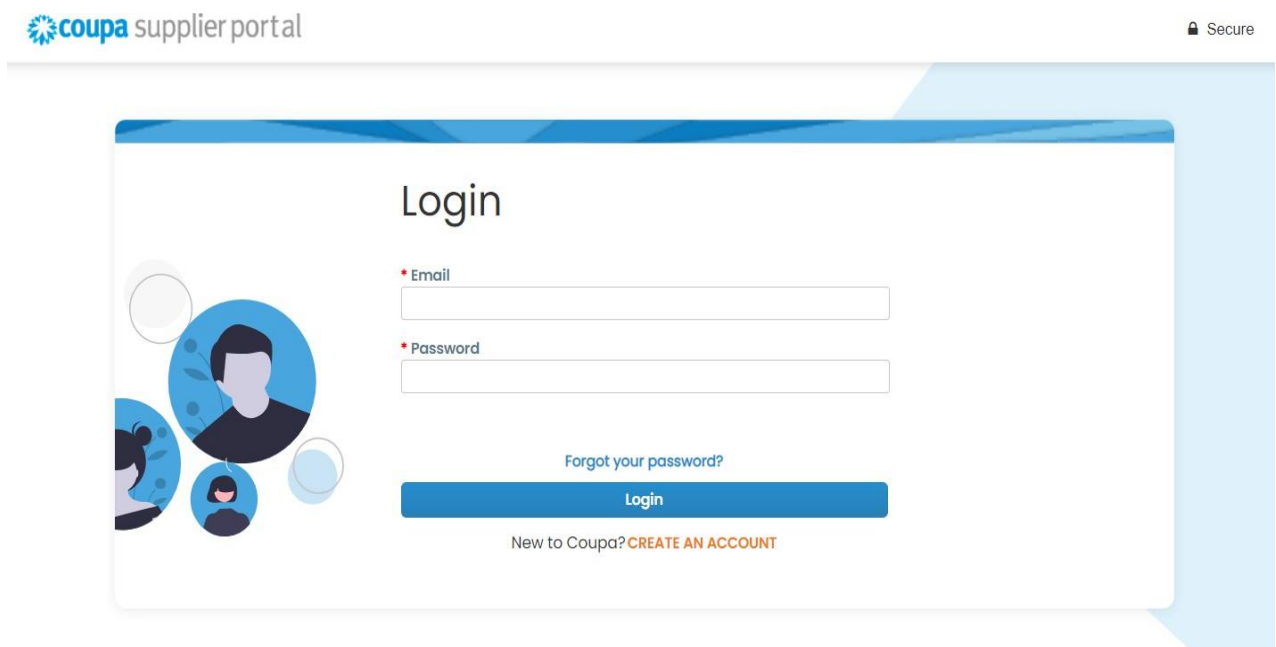
If there is line level taxation, you can input the Tax per Purchase Order line by checking the **Line Level Taxation** checkbox. A Tax box will appear on the individual PO line where you will enter the **Tax Rate**.



The screenshot shows the 'Lines' section of a Coupa interface. At the top right, a checkbox labeled 'Line Level Taxation' is checked and highlighted with a red box. Below this, a table lists purchase order lines. The first line is 'Test User Revalidate' with a quantity of 9, a unit of 'Each', and a price of 1,000.00, resulting in a total of 9,000.00. Below the table, there are fields for 'PO Line' (9500001621-1), 'Service/Time Sheet Line' (None), 'Contract', and 'Supplier Part Number'. A 'Billing' section shows '1007_UNITED KINGDOM-62002301-10071189'. At the bottom, a 'Taxes' section is highlighted with a red box, containing a table with columns for 'Tax Description', 'Tax Rate', 'Tax Amount', and 'Tax Reference'. The 'Tax Amount' field is currently set to 0.00.

How to Create a Credit Note

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

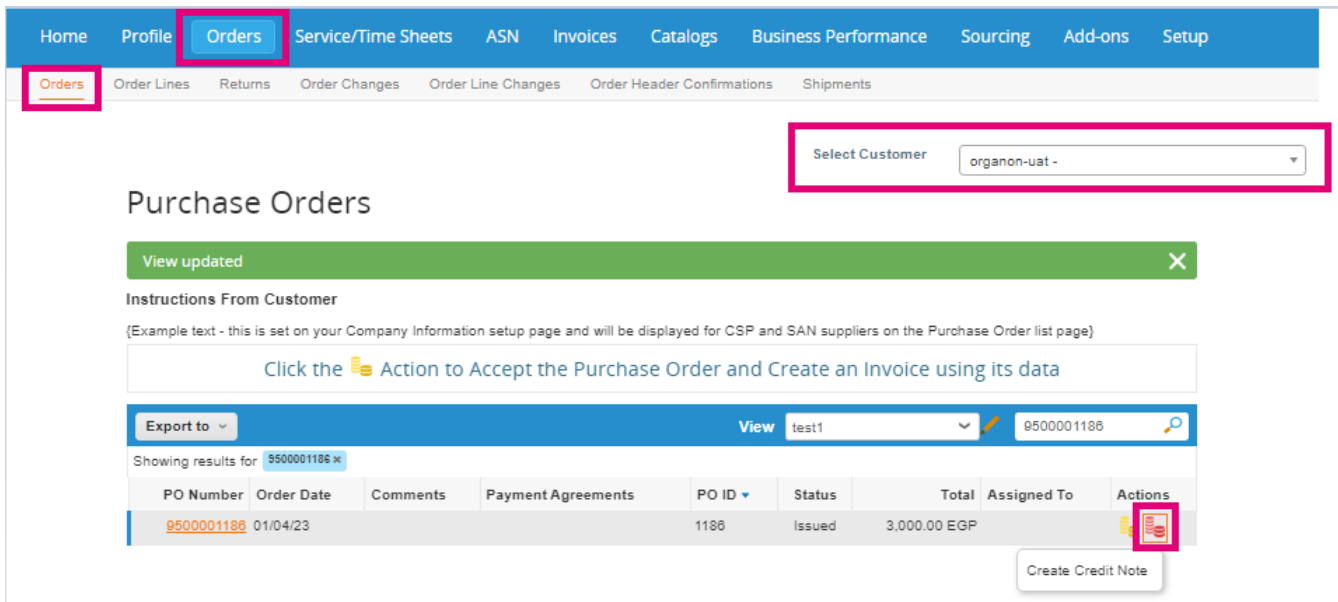


The screenshot shows the 'coupa supplier portal' login page. The page is titled 'Login' and features a blue header with the Coupa logo. On the left, there is an illustration of three people's heads. The main content area contains two input fields: 'Email' and 'Password', both marked with a red asterisk. Below the password field is a link for 'Forgot your password?'. A blue 'Login' button is positioned below the input fields. At the bottom, there is a link for 'New to Coupa? CREATE AN ACCOUNT'. The page is marked as 'Secure' in the top right corner.

2. If you want to create a Credit Note, you have multiple possibilities to do so.

a. To submit a **General Credit Note** (credit note for multiple invoices in the same PO number):

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

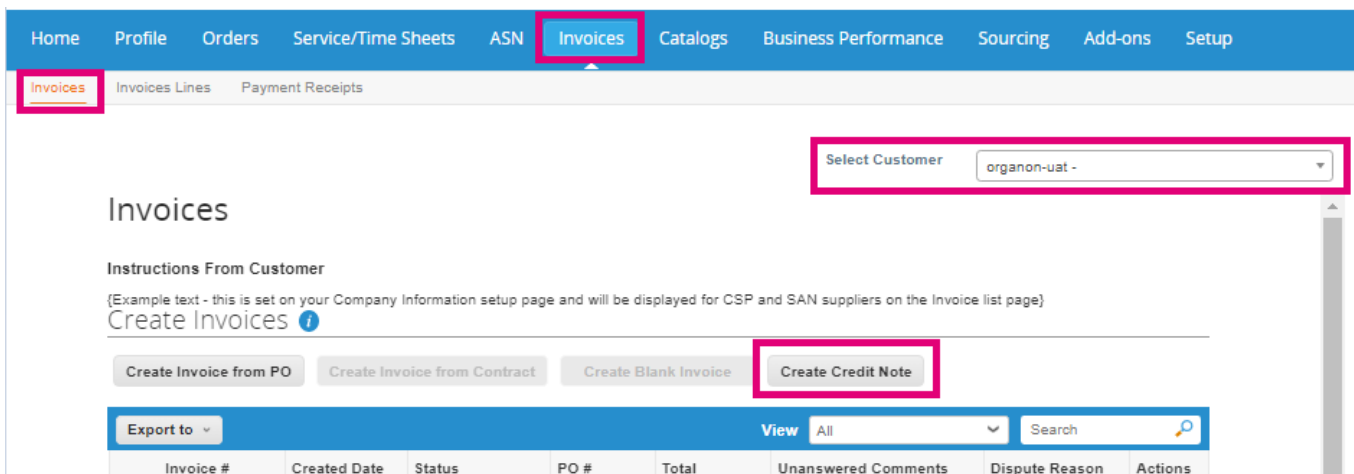
Export to View test1 9500001186

Showing results for 9500001186

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. To submit a **Credit Note for a Specific Invoice**:

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




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

Invoices Invoices Lines Payment Receipts

Select Customer organon-uat -

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)

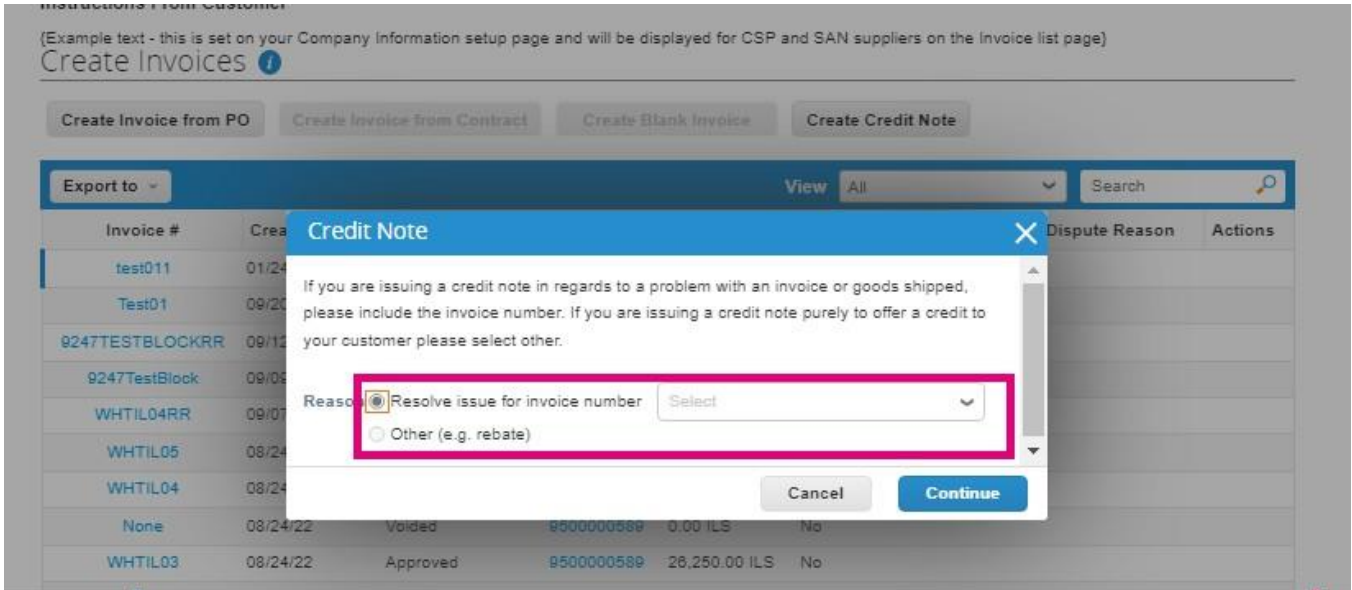
Create Invoices 

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

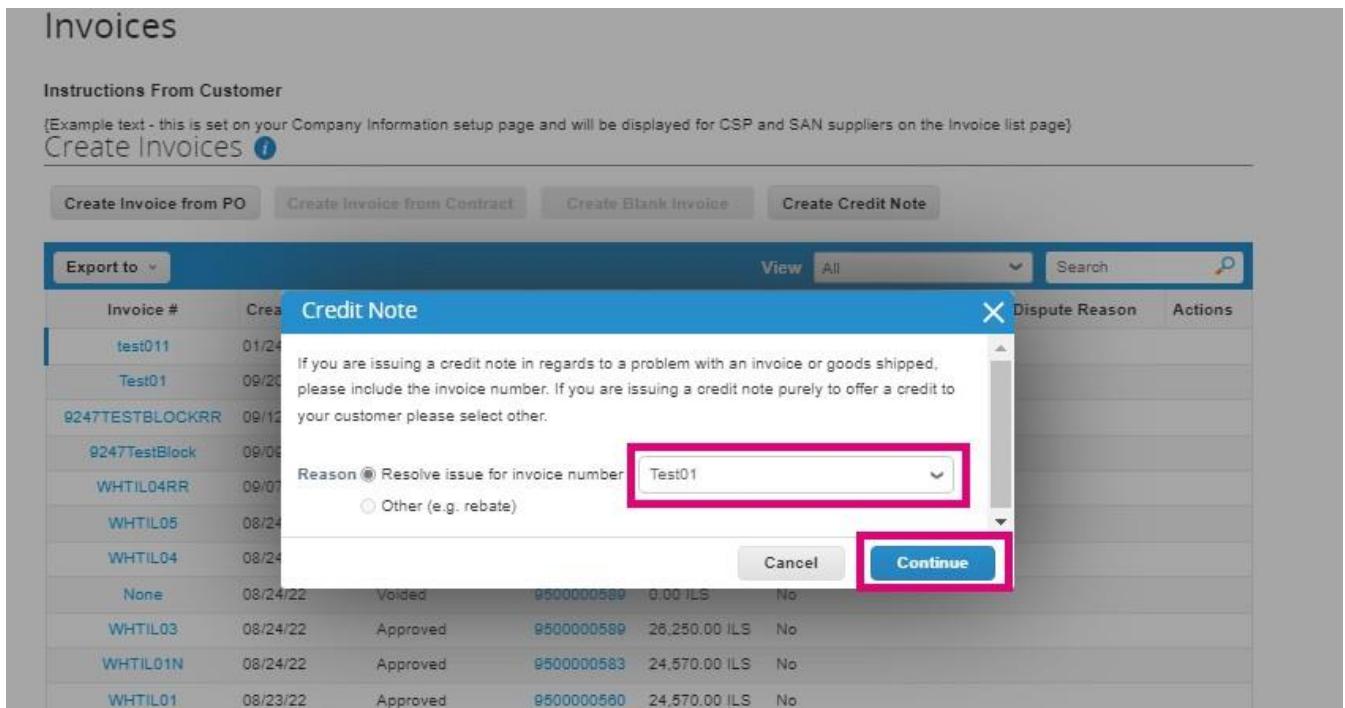
Export to View All Search

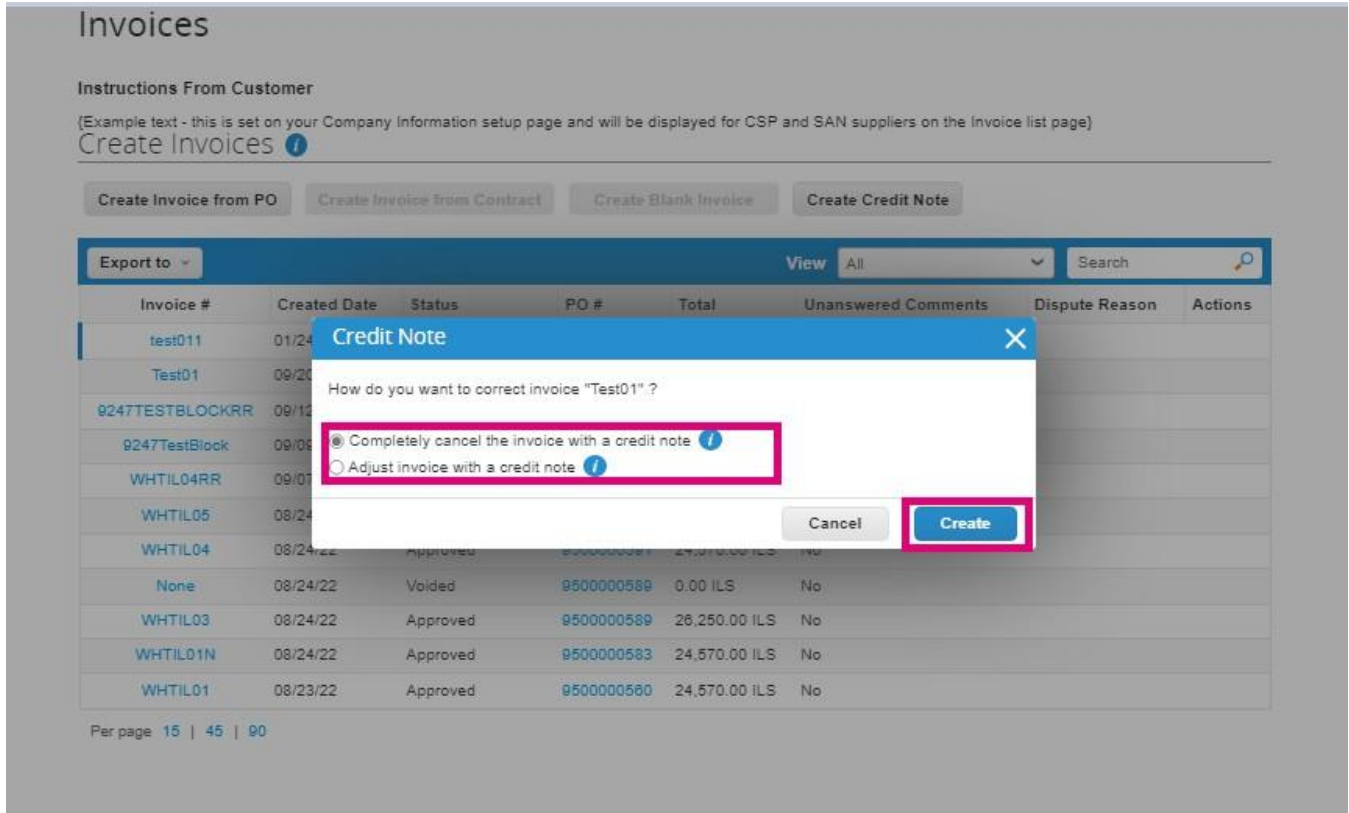
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
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A pop-up message will appear where you will be asked to either choose to **Resolve issue for invoice number** or **Other**



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.





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, Norway, New Zealand, Pakistan, Poland, Romania, Serbia, Singapore, Slovakia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, UK, United Arab Emirates, USA

Select Customer: Organon UAT

Create Invoice Create

General Info

* Invoice #

* Invoice Date: 09/07/22

Payment Term: 2507 within 30 days from invoice date due net

Date of Supply: 09/07/22

* Currency: GBP

Delivery Number:

Status: Draft

Shipping Term: FCA

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:

To

Customer: Organon UAT

* Bill To Address: Organon Pharma (UK) Limited
The Hewett Building
14 Hewett St
London
EC2A 3NP
United Kingdom

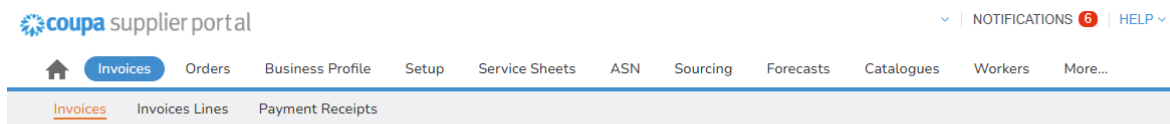
* Buyer VAT ID: GB23713204

Ship To Address: SHOTTON LANE
CRAMLINGTON
NE23 3JU
United Kingdom
Location Code: 1012

* Number of Poles:

Note: The **Invoice number** and **date** in Coupa must be an **exact match** with the ones present on the **actual invoice** otherwise the invoice will be rejected by the Invoice processing team (for more details please visit the Best Practices For Compliance guide). 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.

Note: For Norway, Denmark, Poland and Korea “Payment Order Reference” field is **mandatory**.



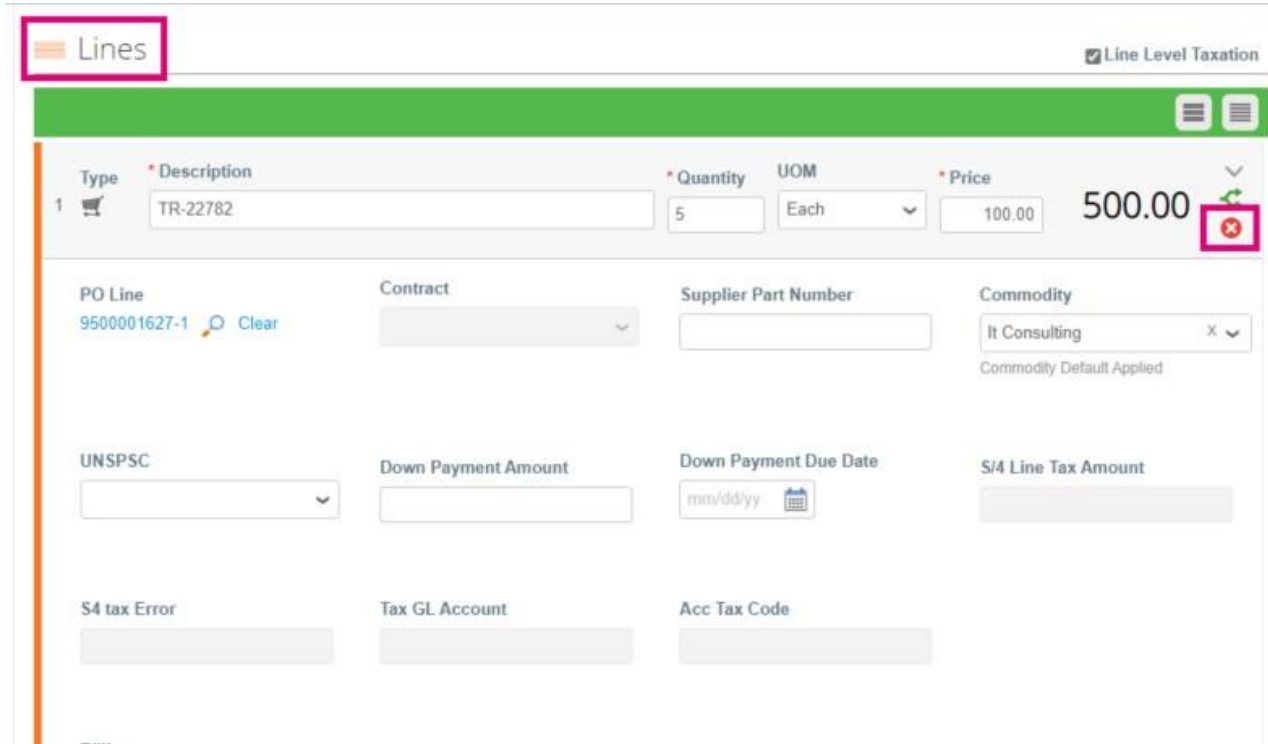
Select customer

Create Invoice [Create](#)

Creating your first invoice? just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold. ✕

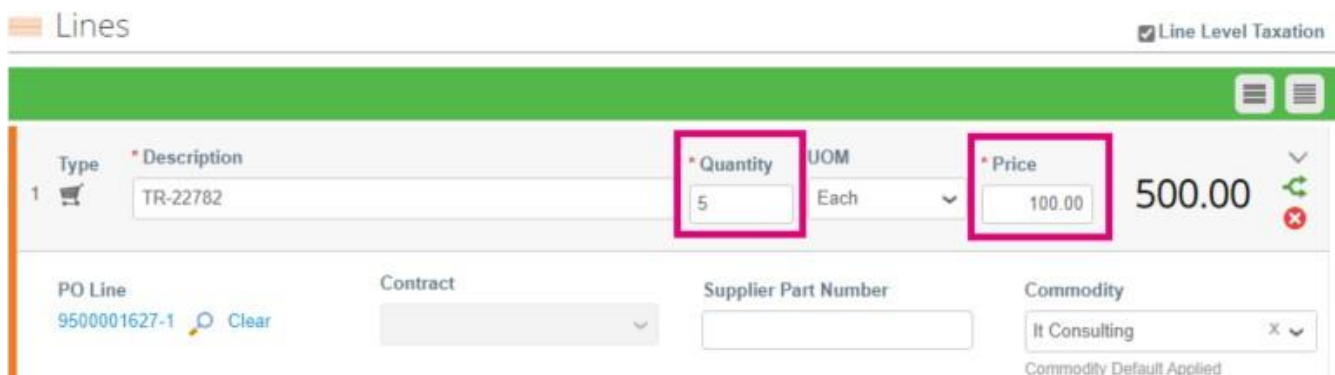
⚙️ General Info	📍 From
* Invoice # <input type="text"/>	* Supplier 0001005726-WWWT EMEA UK LIMITED
* Invoice Date <input type="text" value="27/01/2025"/>	* Supplier VAT ID <input type="text" value="GB675121247"/>
Payment Term Z511-Within 90 days from invoice date, due net	* Invoice-From Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom LTD"/>
Date of Supply <input type="text" value="27/01/2025"/>	* Remit-To Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom"/>
* Currency <input type="text" value="EUR"/>	* Ship-From Address <input type="text" value="Test Account REGENT HOUSE LONDON London W3 0XA United Kingdom"/>
Delivery Number <input type="text"/>	
Status <input type="text" value="Draft"/>	
Shipping Term <input type="text" value="DAP"/>	
Supplier Note <input type="text"/>	
Attachments <input type="text" value="Add File URL Text"/>	
Discount Amount <input type="text"/>	
Payment Order Reference <input type="text"/>	
Cash Accounting <input type="text"/>	

- 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 the 'Lines' section of a software interface. At the top left, there is a tab labeled 'Lines'. On the right, there is a checkbox for 'Line Level Taxation' which is checked. Below this is a green header bar with two menu icons. The main area contains a table with columns: Type, Description, Quantity, UOM, Price, and a total amount. The first row shows: Type '1', Description 'TR-22782', Quantity '5', UOM 'Each', Price '100.00', and a total of '500.00'. A red 'X' icon is next to the total amount. Below the table are several input fields: PO Line (9500001627-1), Contract, Supplier Part Number, Commodity (It Consulting), UNSPSC, Down Payment Amount, Down Payment Due Date (mm/dd/yy), S/4 Line Tax Amount, S4 tax Error, Tax GL Account, and Acc Tax Code.

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






This screenshot is similar to the previous one but with the 'Quantity' and 'Price' fields highlighted with red boxes. The 'Quantity' field contains the value '5' and the 'Price' field contains '100.00'. The total amount '500.00' is still displayed, and the red 'X' icon is now a green refresh icon.

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.

- 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
Total	9,000.00