







# INVOICING HSBC VIA COUPA SUPPLIER PORTAL


## Supplier Guidance Document

# Create an invoice from a PO

- 1. Go to the **Orders** page, search for the Purchase Order you want to submit an invoice for and then select the 'Golden coins' icon under **Actions**. 


coupa supplier portal

SUPPLIER  | NOTIFICATIONS 99+ | HELP 

 Invoices **Orders** Business Profile Payments Service Sheets ASN Sourcing Setup More...

Orders Order lines Returns Order Changes Order Line Changes Order Confirmations More...


Select Customer 


HSBC - 3109\_DATEV eG 

Purchase Orders


Instructions From Customer


Please select the golden coins icon next to the PO to create an associated invoice. The invoice must match the PO in order to be processed.





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

Export to 

View 

Open Orders 

Search 

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
<a href="#">DE00001540</a>	23/05/2025	Issued	23/05/2025	Test KPMG	No	1,000.00 EUR	 
<a href="#">DE00001539</a>	23/05/2025	Issued	23/05/2025	Test	No	1,000.00 EUR	 

Complete 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 selecting the corresponding **Search** (magnifying glass) icon in the **From** section. For a PO backed invoice, the **Bill- To Address** will be auto-populated from the PO.

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.

### Create Invoice Create

#### General Info

\* Invoice #

\* Invoice Date

01/11/19

Payment Term

Net 30

Accelerate Payment

\* Currency

USD

Delivery Number

Status

Draft

Shipping Term

Standard

Image Scan

Browse... No file selected.

Supplier Note

\* Attachments

Add File | URL | Text

Discount Amount

Payment Order Reference

#### From

\* Supplier

SUPPLIERNAME

Supplier Tax ID

None

\* Invoice From Address

ABCD  
123 Success Ave  
Results City, XY 99999  
United States

\* Remit-To Address

ABCD  
123 Success Ave  
Results City, XY 99999  
United States

\* Ship From Address

ABCD  
123 Success Ave  
Results City, XY 99999  
United States

#### To

Customer

Coupa

\* Bill To Address

No address selected

Buyer Tax ID

Ship To Address

No address selected

Lines

Line Level Taxation

3



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.

Lines

Type

Description

Print Services

Price

225.00

225.00

PO Line

2819-1

Clear

Pick Order Line(s)

Contract

Supplier Part Number

UNSPSC

Select an Option

Billing

SF-Marketing-Indirect

Taxes

Tax Description

Tax Rate

Tax Amount

Tax Reference

Add Tag

Add Line

Pick lines from PO

Totals & Taxes

Lines Net Total

225.00

Lines Tax Totals

0

You can also add PO lines from other open orders by selecting the Pick Lines from PO link or the Add icon next to it. In the appearing Pick Lines to Add popup, select the Add icon in the Actions column for the order line that you want to add.

Pick Order Line(s)

Invoice Line

Line

1

Type

Amount

Description

Print Services

UOM

Quantity

Price

225.00

Total

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

2819

Line

1

Item

Print Services 1

UOM

None

Qty

None

Price

125.00

Invoiced

0.00

Actions

Choose

PO Number

2819

Line

2

Item

Print Services 2

UOM

None

Qty

None

Price

100.00

Invoiced

0.00

Actions


Choose



In the **Subtotal** section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

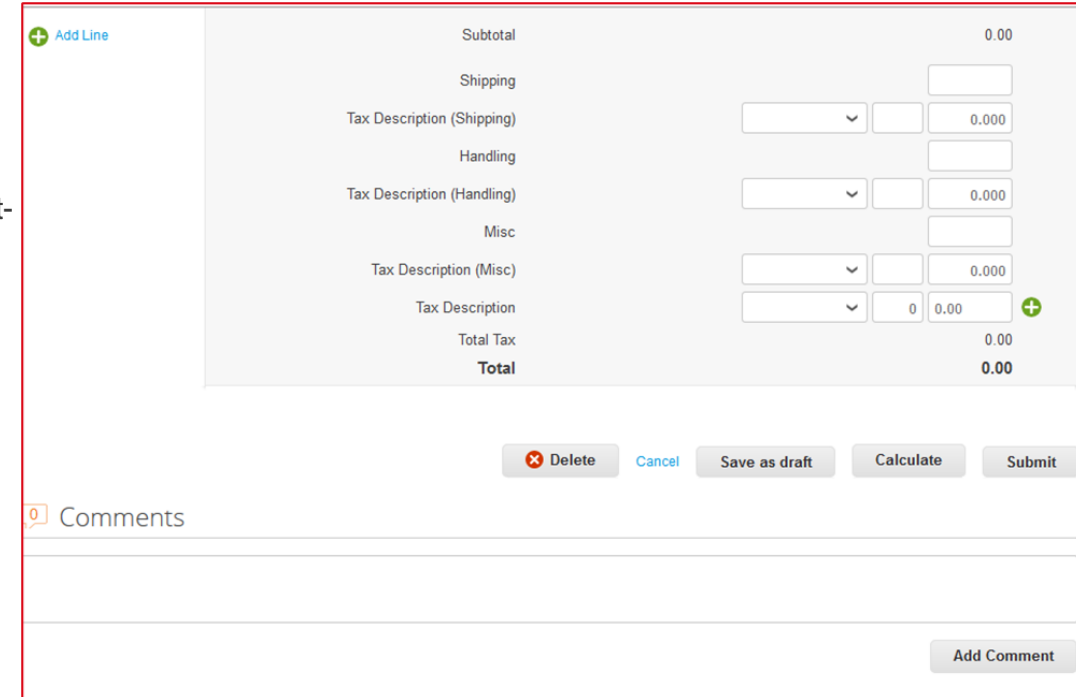
Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.

Selecting **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, provided that your Coupa customer allows their suppliers to add lines.


Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.


Once you are ready, click **Submit**.




The screenshot shows the 'Subtotal' section of an invoice in Coupa. It includes a table for adding shipping, handling, and miscellaneous costs, each with a dropdown for tax description and a numeric input for the amount. Below the table are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. At the bottom, there is a 'Comments' section with a text area and an 'Add Comment' button.

Subtotal		0.00
Shipping		
Tax Description (Shipping)		0.000
Handling		
Tax Description (Handling)		0.000
Misc		
Tax Description (Misc)		0.000
Tax Description	0	0.00 
Total Tax		0.00
<b>Total</b>		<b>0.00</b>

 Add Line

 Delete [Cancel](#) [Save as draft](#) [Calculate](#) [Submit](#)

 Comments

[Add Comment](#)



**Invoices must be created one by one; no bulk creation is possible.**

## Edit an invoice

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

You are required to accept the PO and the following restrictions will apply to the corresponding invoice:

- **Currency** – Cannot be changed from PO currency.
- **Unit Of Measure** – 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.

## Create a blank invoice

1. Select the **Create Blank Invoice** button above the **Invoices** table on the **Invoices** page.
2. Create a new or choose an existing invoice-from address.
3. On the **Create Invoice** page, complete at least the mandatory fields (marked with a red asterisk) in your invoice.
4. For Blank (Non-PO) invoices, select the **Bill-To address** (this is the HSBC entity you are invoicing)


# Create Invoice

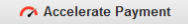
Create

---

General Info

\* Invoice #

\* Invoice Date  

Payment Term Net 30 

\* Currency


Delivery Number

Status Draft

Shipping Term

Image Scan  No file selected.

Supplier Note

\* Attachments  Add [File](#) | [URL](#) | [Text](#)


Discount Amount


Payment Order Reference


From

\* Supplier SUPPLIERNAME

Supplier Tax ID None

\* Invoice From Address ABCD  
123 Success Ave  
Results City, XY 99999  
United States 

\* Remit-To Address ABCD  
123 Success Ave  
Results City, XY 99999  
United States 

\* Ship From Address ABCD  
123 Success Ave  
Results City, XY 99999  
United States 

To

Customer Coupa

\* Bill To Address No address selected

Buyer Tax ID

Ship To Address No address selected

Lines

Line Level Taxation

Subtotal		0.00
Shipping		
Tax Description (Shipping)		0.000
Handling		
Tax Description (Handling)		0.000
Misc		
Tax Description (Misc)		0.000
Tax Description	0	0.00
Total Tax		0.00
<b>Total</b>		<b>0.00</b>

✖ Delete
Cancel
Save as draft
Calculate
Submit


0 Comments

Add Comment

In the **Subtotal** section, you can enter values and select tax rates for shipping, handling, and miscellaneous costs.

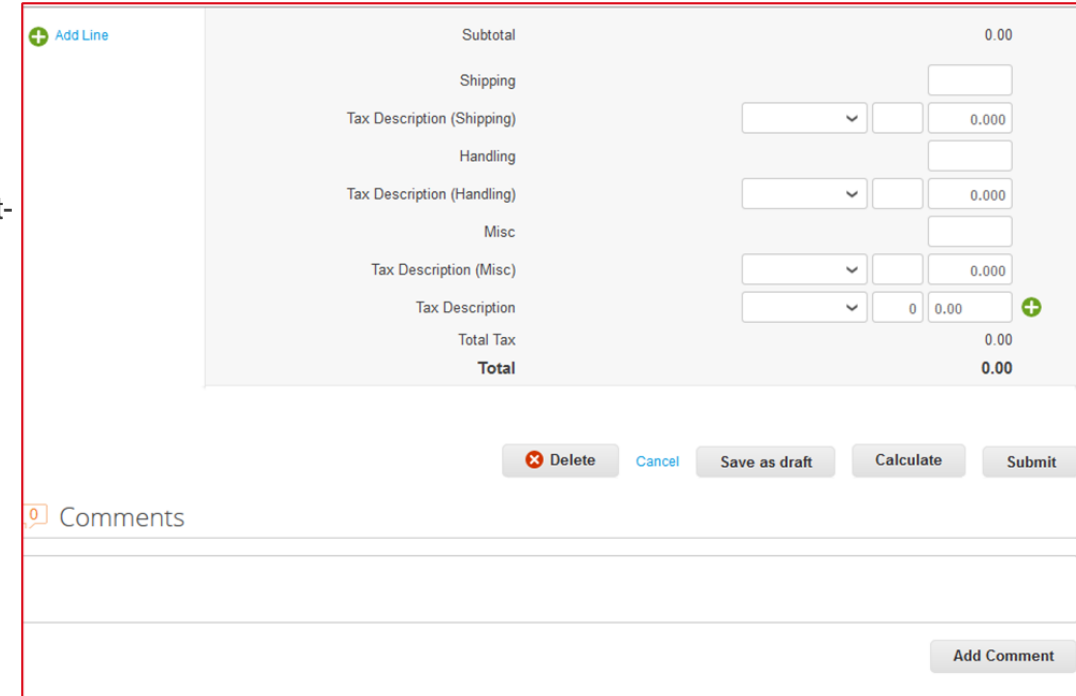
Applicable tax rates are determined by the tax code on the invoice. The tax rate is a government-regulated rate to be paid to the tax authorities as part of the sale and it is shown as a percentage. It applies to all commodities sold in a specified geographical area.

Selecting **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, provided that your Coupa customer allows their suppliers to add lines.


Selecting the **Line Level Taxation** checkbox, allows you to enter tax information for each invoice line.


Once you are ready, click **Submit**.




The screenshot shows the 'Subtotal' section of an invoice in the Coupa system. It includes a table for adding shipping, handling, and miscellaneous costs, each with a dropdown for tax description and a numeric input for the amount. The 'Total Tax' is shown as 0.00. Below the table are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. At the bottom, there is a 'Comments' section with a text area and an 'Add Comment' button.

Subtotal		0.00
Shipping		
Tax Description (Shipping)		0.000
Handling		
Tax Description (Handling)		0.000
Misc		
Tax Description (Misc)		0.000
Tax Description	0	0.00 
Total Tax		0.00
<b>Total</b>		<b>0.00</b>

 Add Line

 Delete [Cancel](#) [Save as draft](#) [Calculate](#) [Submit](#)

 Comments

[Add Comment](#)



**Invoices must be created one by one; no bulk creation is possible.**



