

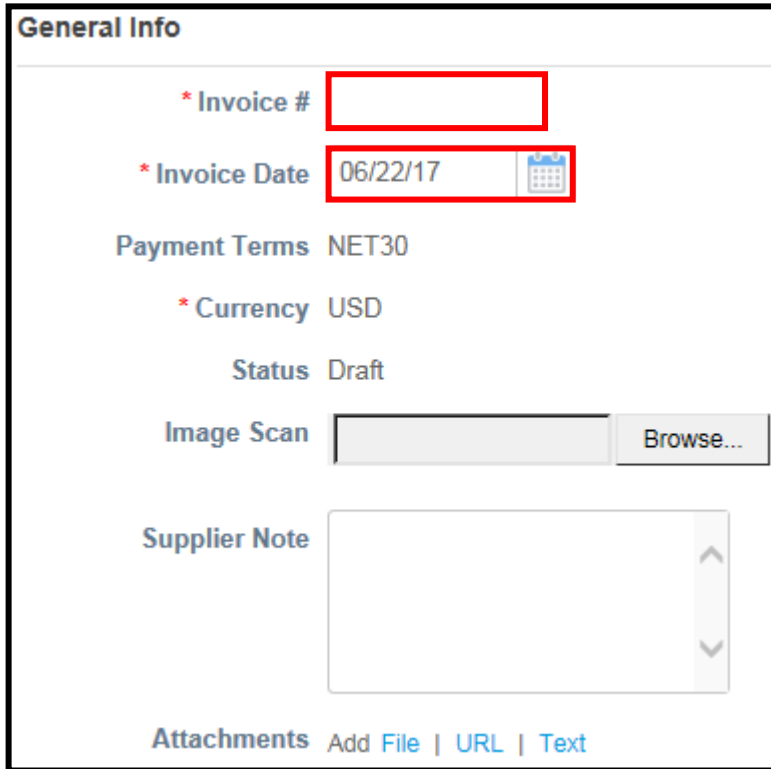
# Quick Reference Guide – Adding Tax to Invoices

## Adding Tax to an Invoice

This guide will provide instructions on how to add Tax to invoices generated in the Coupa Supplier Portal (CSP) or using a Supplier Actionable Notification (SAN) that notified you of a new PO. Detail will be provided on how to tax an entire invoice as well as how to add line level taxation to Invoices with multiple line items.

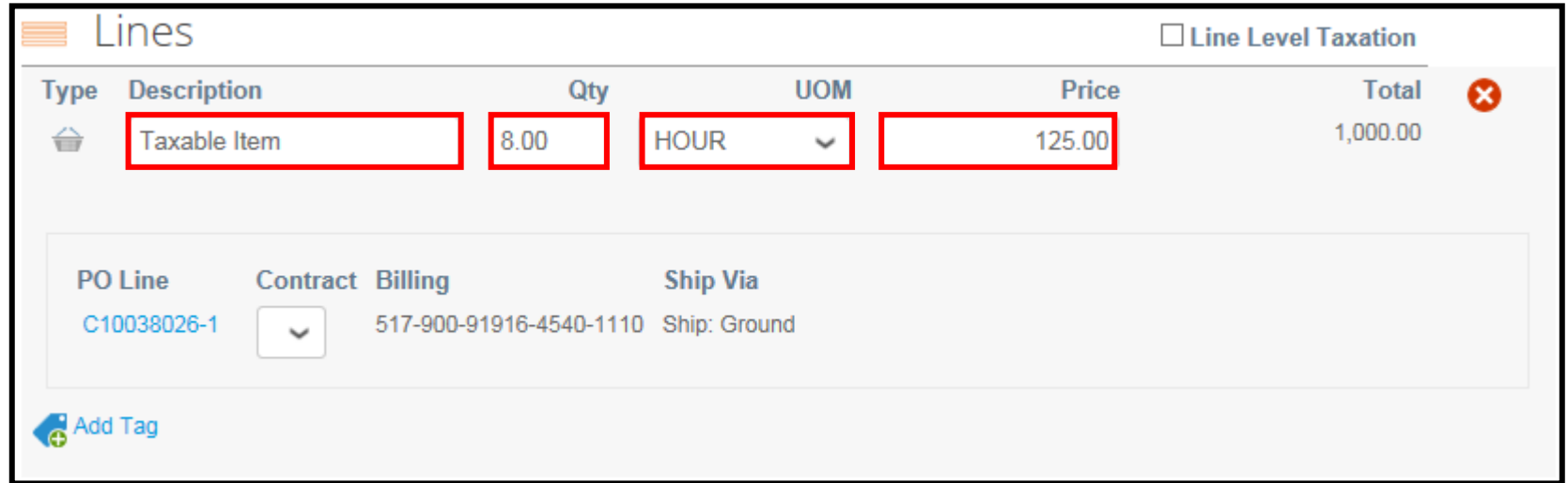
### Adding tax to entire invoice

1. Start with creating an Invoice and filling out the necessary information, I.E. Inv Number & Date, Quantity, UoM and Price. Any field that has a Red Asterisk next to it



**General Info**

- \* Invoice #
- \* Invoice Date 06/22/17
- Payment Terms NET30
- \* Currency USD
- Status Draft
- Image Scan  Browse...
- Supplier Note
- Attachments Add File | URL | Text



**Lines**  Line Level Taxation

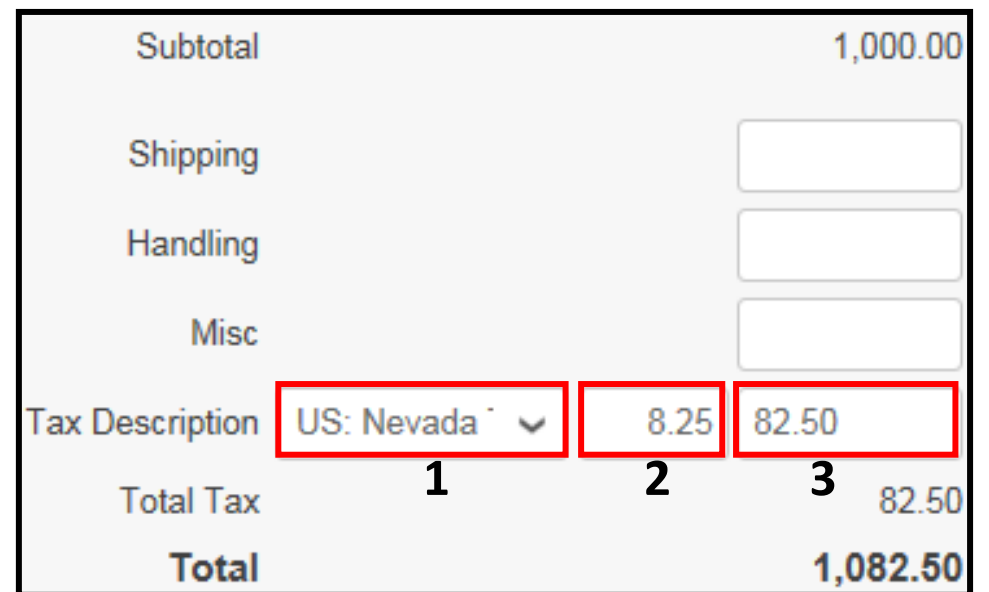
Type	Description	Qty	UOM	Price	Total
	Taxable Item	8.00	HOUR	125.00	1,000.00

PO Line: C10038026-1 Contract: Billing: 517-900-91916-4540-1110 Ship Via: Ship: Ground

Add Tag

2. Once completed with the top sections you will find a grey box at the bottom of the screen with several empty fields.

- **Box 1:** has a drop down with preselected tax rates, click the arrow button to select
- **Box 2:** will auto-fill a preselected tax rate, or you can manually add tax by clicking in the box and adding the percentage. It will calculate tax off of the Subtotal.
- **Box 3:** will auto-fill to reflect the dollar amount based on the Subtotal and the value add in Box 1 or Box 2. You can also leave Box 1 & 2 blank and enter the exact dollar amount in this field.

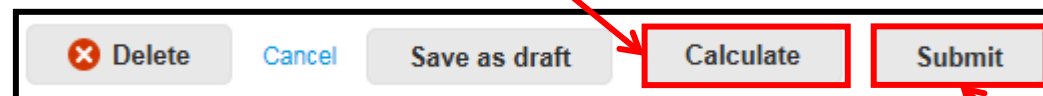


Subtotal			1,000.00
Shipping			
Handling			
Misc			
Tax Description	US: Nevada	8.25	82.50
Total Tax	1	2	3 82.50
<b>Total</b>			<b>1,082.50</b>

3. Once the correct tax information has been entered select the Calculate button.

### \*\*\*Please Note\*\*\*

Each time an Invoice is submitted, the Calculate button should be used. This will ensure that any changes or updates made are included. Making changes and not using Calculate will cause the changes to no reflect on the final invoice submission.



Delete Cancel Save as draft Calculate Submit

4. After Calculate, confirm the Total Amount is correct then click Submit to send the invoice to MGM for review.