

QUICK REFERENCE GUIDE

HOW TO RAISE A CREDIT NOTE IN THE COUPA SUPPLIER PORTAL (CSP)

(Increase the zoom to view the screenshots clearly.)

You would only use this process guide if the invoice you want to credit **is not** in a status of dispute. If the invoice is in a status of dispute, please follow the <u>How to resolve a disputed invoice entered by</u> <u>Coupa Supplier Portal</u>

🔅 coupa	a supplier portal	Step 1
Home Setup	Profile Orders Service/Time Sheets ASN	Go to the Invoices tab in your Coupa supplier portal account.
Invoices	Invoices Lines Payment Receipts You have 2 customer announcements related to Invoices (IRT - TEST) <u>View All Announcements</u>	Select the "Create Credit Note' button.
	Select Customer	
	Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the I Create Invoices Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note	vo
	Export to View All	
Invoid	ces	Step 2



Select an option from the "Reason" in the pop up box and select the invoice # you want to credit.

Select continue.

Invoices	5					
Instructions Free (Example text - th Create Inv	om Custor iis is set on /OICES	mer you	Company Information setup page and will be displayed for CS	P and SAN suppliers on the Invoi	ce list page)	
Create Invoice	e from PO		Create Invoice from Contract Create Blank Invoice	Create Credit Note		
Export to ~		Γ		View All	Search	P
Invoice #	Created	ate	Credit Note		×	Actions
None	10/8/23		How do you want to correct invoice "ZZZaa" ?			10
Abcdefg	24/7/23		Completely cancel the invoice with a credit note		chtract or Catalog	
ZZZaa	24/7/23		Adjust invoice with a credit note			
InvReqAccess1	20/2/23				-	
Per page 15	45 90			Cancel Create		

Step 3

In the next pop up screen, select the appropriate option for the invoice you want to cancel. The information icons provide you with an explanation of each available option.



COUPA SUPPLIERS

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his credit note applies to invoice 1234abcd. When app	proved, the credit will fully cancel the invoice's impact	to the transaction.	Complete the required details of the complete the required details of the complete the required details of the complete
General Info	From		the credit note as you would an
Credit Note # Credit Note Date 25/8/23	* Supplier * Supplier ABN * Invoice-From Address	IRT Lawn Mowing Pty Ltd 12345678911 IRT Lawn Mowing Pty Ltd	invoice and submit.
sinal Date of Supply 25/8/23		PO Box 77 Wollongong, NSW 2500 Australia	Then "send credit note"
Delivery Number Status Draft	* Remit-To Address	IRT Lawn Mowing Pty Ltd PO Box 77 Wollongong, NSW 2500 Australia	
Create Replacemen		I AX KETERENCE	Step 5 You can choose to create a new
Do you want to create a ne	w involce to replace the one	you just canceled?	invoice at this step if required.

							~
structions Fi	rom Customer						
xample text - t	his is set on you	Company Informat	ion setup pag	ge and will be di	splayed for CSP and SAN s	uppliers on the Invoice list page}	
reate in	voices 🕖						
Create Invoid	e from PO	Create Invoice fro	m Contract	Create BI	lank Invoice Create	Credit Note	
_							
Export to ~					View A	II Y Se	arch 🔑
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
Invoice # 1234abcd CN	Created Date 25/8/23	Status Approved	PO # None	Total -550.00 AUD	Unanswered Comments	Dispute reason	Actions
Invoice # 1234abcd CN 1234ergn	Created Date 25/8/23 25/8/23	Status Approved Pending Approval	PO # None None	Total -550.00 AUD 440.00 AUD	Unanswered C mments No	Dispute reason	Actions
Invoice # 1234abcd CN 1234etgn 1234abcd	Created Date 25/8/23 25/8/23 25/8/23	Status Approved Pending Approval Approved	PO # None None	Total -550.00 AUD 440.00 AUD 550.00 AUD	No No	Dispute reason	Actions

Step 6

You can see the credit note and invoice in your invoices section.