



HOW TO SUBMIT AN INVOICE OR CREDIT NOTE VIA THE COUPA SUPPLIER PORTAL (CSP)

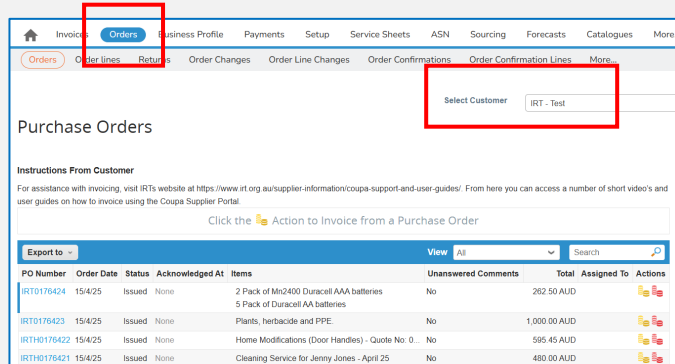
(Increase the zoom to view the screenshots clearly.)

There are several ways you can submit an invoice to IRT. The links below provide step-by-step instructions to guide you through each submission method available. Simply select the option that best suits you to be taken directly to the relevant instructions.

- [Submit an invoice against a purchase order \(PO\)](#)
- [Submit an invoice against a bucket PO](#) (A bucket PO can be used for multiple invoices over a period of time for the same service)
- [Submit an invoice with split GST requirements against a PO](#)
- [Submit an invoice without a PO](#)
- [Submit an invoice against multiple PO's](#)
- [Submit a credit note against a PO](#)
- [Submit a credit note against a bucket PO](#)
- [Submit a credit note without a PO](#)
- [Action a disputed invoice you entered into the CSP](#)
- [Action a disputed invoice entered by IRT on your behalf](#)

Submit an invoice against a purchase order

(All IRT purchase order amounts exclude GST. You will apply the relevant GST rate when invoicing.)



Purchase Orders

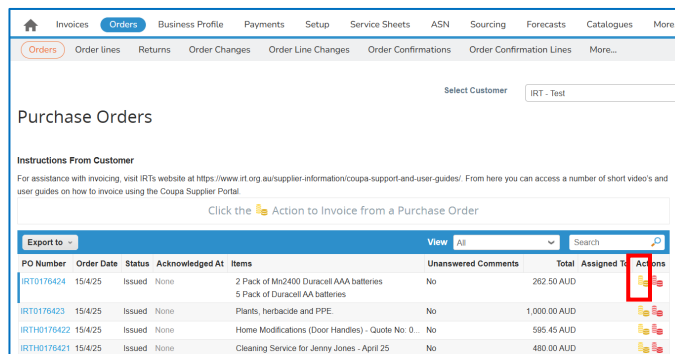
Instructions From Customer
For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

Click the  Action to Invoice from a Purchase Order

Export to	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
	IRT0176424	15/4/25	Issued	None	2 Pack of Min2400 Duracell AAA batteries 5 Pack of Duracell AA batteries	No	262.50 AUD		
	IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE.	No	1,000.00 AUD		
	IRT0176422	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No. 0.	No	595.45 AUD		
	IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25	No	480.00 AUD		

Step 1

In your Coupa Supplier Portal, click on the Orders tab and make sure the Selected Customer is Illawarra Retirement Trust.



Purchase Orders

Instructions From Customer
For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

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	IRT0176424	15/4/25	Issued	None	2 Pack of Min2400 Duracell AAA batteries 5 Pack of Duracell AA batteries	No	262.50 AUD		
	IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE.	No	1,000.00 AUD		
	IRT0176422	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No. 0.	No	595.45 AUD		
	IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25	No	480.00 AUD		

Step 2

Find the purchase order that you want to invoice and select the Gold Coin icon in the Actions column to the far right.

Note: If you require more information about the purchase order, click on the purchase order number to review the IRT requester, need by date and home care client name if applicable.

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

* Invoice # Inv-101

* Invoice Date 15/4/25

Payment Term 300

Date of Supply 8/4/25

* Currency AUD

Delivery Number

Image Scan **Choose file** Test Invoice.pdf

Supplier Note

Attachments Add File | URL | Text

From

* Supplier IRT Training Supplier Pty Ltd

* Supplier ABN 12345678911

* Invoice-From Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

* Remit-To Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

* Ship-From Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

To

Customer IRT Test

* Customer Address Hawarra Retirement Trust
PO Box 2106
Wollongong DC, NSW 2500
Australia

Step 3

After clicking the gold coin icon, you will land on the Create Invoice screen.

Enter the following information:

- If the Remit-To Address has No address selected, click on the magnifying glass and select the address for Bank Accounts. If there is an address, you can skip this action. **It is important to complete this step first.**
- Your invoice number;
- Your invoice date (payment terms start from this date);
- Date of supply;
- Image scan – This is where you will upload a copy of your invoice.

If you're creating an invoice against a bucket order [click here](#) to navigate back to the next step in that process, otherwise continue to Step 4 below.

Choose Invoicing Details

* Legal Entity Rainy Days Pty Ltd

Invoice From 54 Sunny Days Street
Sunny Days, NSW 2000
Australia

* Remit-To Select

* Ship-From Address Select

Bank Accounts
ComBank ***555 (54 Sunny Days Street, Sunny Days, NSW 2000, Australia)

Lines

Type	Description	Qty	UOM	Price	
PO Line	Mn2400 Duracell AAA	1	Pack	45.00	90.00
Service Sheet Line	None				
Contract					
Credit Line	None				
Supplier Part Number					
Visit ID	None				
WO Number	None				
Client ID & Name	None				
Billing	45013-300010-1000-01-0				
Taxes					
GST Rate	10.0%				
Type	Description	Qty	UOM	Price	
PO Line	Duracell AA batteries	2.0000	Pack	34.50	172.50
Service Sheet Line	None				
Contract					
Credit Line	None				

Select relevant GST Rate

Click on the X icon to delete a line

Step 4

Scroll down to the lines section, which has populated all the information contained in the IRT purchase order that you have selected to invoice. You must complete the following:

- Adjust the quantity and/or price if it doesn't match your invoice;
- If there are multiple lines and you are not invoicing all lines, delete the lines not being invoiced;
- Select the relevant GST rate from the drop down menu for all lines.



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

GST Rate: 0.0% GST Amount: 0.00 Tax Reference:

Add Line Pick lines from PO Pick lines from Contract

Total Taxes

Lines Net Total	114.00
Lines GST Totals	4.50

Shipping: GST: 0.000 Tax Reference: Enter a tax reason description.

Total GST: 4.50 Net Total: 114.00 Gross Total: 118.50

Delete Cancel Save as draft Calculate Submit

Step 5

Scroll down to the bottom of the invoice (or credit note) and select the “Calculate” button.

Confirm the Gross Total and Total GST match your invoice (or credit note) and “Submit”.

GST Amount: Tax Reference:

Are you ready to send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Continue Editing Send Invoice

Description Qty UOM Price 6

Duracell AA batteries 2.0000 Pack 34.50

Select “Send Invoice” (or “Send Credit Note”) from the next pop up screen.

Invoices

Select Customer: IRT - Test

Invoice deleted

Instructions From Customer

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Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

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
Inv-101 Credit Note	15/4/25	Pending Approval	IRT0176424	-49.50 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT0176424	118.50 AUD	No		
XYZ	25/2/25	Pending Approval	IRT0176131	550.00 AUD	No		
ABCD1234	24/2/25	Approved	IRT0176131	275.00 AUD	No		

Per page: 15 | 45 | 90

Step 6

You will land on the Invoices section of your Coupa Supplier Portal where you can keep track of the status of your invoices and credit notes.

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Submit an invoice against a bucket purchase order

(All IRT purchase order amounts exclude GST. You will apply the relevant GST rate when invoicing.)

A bucket purchase order can be a single line or multiple lines for the same service type, with each line representing a different time period, e.g. month. You can reuse a PO line for multiple invoices, as long as the charges match the line description. For example: If you perform a weekly clean in April, you can invoice the April PO line four times to cover each week's service.

Purchase Orders

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Click the  Action to Invoice from a Purchase Order

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	IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE.	No	1,000.00 AUD		
	IRT0176422	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No: 0	No	595.45 AUD		
	IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25 Cleaning Service for Jenny Jones - May 25 Cleaning Service for Jenny Jones - Jun 25 Cleaning Service for Jenny Jones - Jul 25	No	480.00 AUD		
	IRT0176131	24/2/25	Issued	None	3 Each of Test of K Client	No	750.00 AUD		

Step 1

Click [here](#) to follow the first three steps of this process. These steps are the same for all PO backed invoicing.

Lines

Type	Description	Price
	Cleaning Service for Je	120

PO Line: IRT0176421-1 

Visit ID: None WO Number: None Client ID & Name: Saliman Robin

Price: 120.00 

Use Red X to delete all other lines

Step 2

Scroll down to the lines section, which has populated all the information contained in the IRT purchase order that you have selected to invoice. Find the relevant line that you are invoicing by clicking into the description of each line and scrolling across to the right to view the full description.

Once you have identified the correct line to invoice, **you must use the red cross icon to delete all other lines not being invoiced, otherwise the invoice will fail approval and delay payment.** You can ignore this step if you are invoicing a single line bucket purchase order.

Please Note: The lines you delete from this invoice will be available for future invoicing.



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

Lines

1	Type	Description	Price	60.00
		Cleaning Service for Je	60.00	

PO Line: IRT0176421-1 [Clear](#)

Service Sheet Line: None

Contract:

Supplier Part Number:

Visit ID: None

WO Number: None

Client ID & Name: Batman Robin

Billing: 30131-342050-1100-01-0

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	6.00	

Step 3

Adjust the quantity and/or price to match your invoice (pre GST amount).

Select the relevant GST Rate from the drop down menu.

[Click here](#) to follow the final steps in the invoicing process.



Submit an invoice with mixed GST requirements against a purchase order

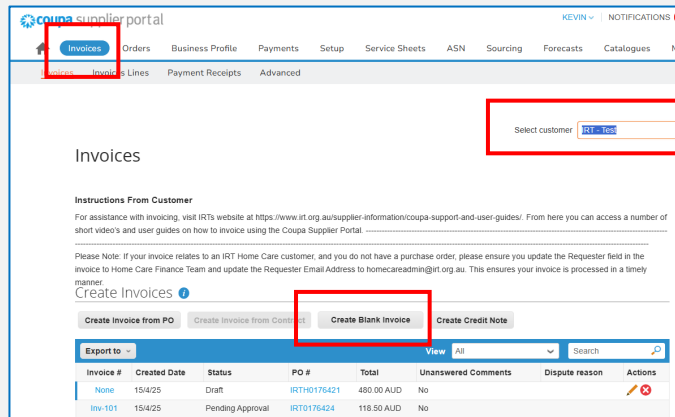
(All IRT purchase order amounts exclude GST. You will apply the relevant GST rate when invoicing.)

Step 1

Please email your invoice to accountspayable@irt.org.au to process your invoice when it requires mixed GST goods and/or services and you have a purchase order for these goods and/or services.

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Submit an invoice without a purchase order



Invoices

Instructions From Customer

For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short videos and user guides on how to invoice using the Coupa Supplier Portal.

Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

Create Invoices

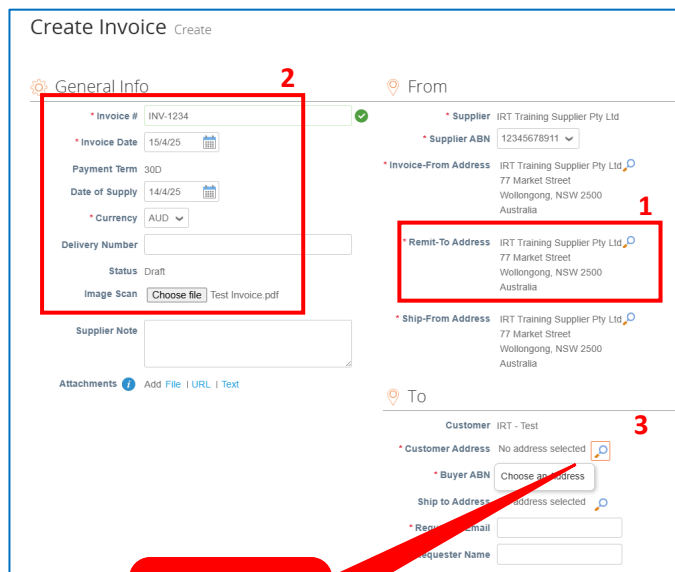
Create Invoice from PO Create Invoice from Contract **Create Blank Invoice** Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
None	15/4/25	Draft	IRT10176421	480.00 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT0176424	118.50 AUD	No		

Step 1

Click on the Invoices tab and make sure the "Select customer" is Illawarra Retirement Trust.

Select the "Create Blank Invoice" button.



Create Invoice Create

General Info

* Invoice # INV-1234

* Invoice Date 15/4/25

Payment Term 30D

Date of Supply 14/4/25

* Currency AUD

Delivery Number

Status Draft

Image Scan Choose file Test Invoice pdf

Supplier Note

Attachments Add File | URL | Text

From

* Supplier IRT Training Supplier Pty Ltd

* Supplier ABN 12345678911

* Invoice-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

* Remit-To Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

* Ship-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

To

Customer IRT - Test

* Customer Address No address selected

* Buyer ABN Choose an address

Ship to Address No address selected

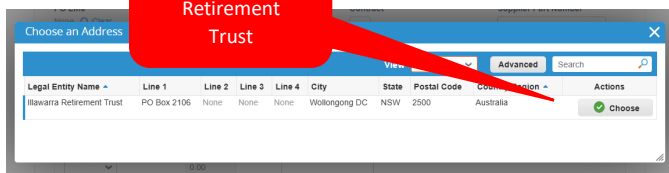
* Remitter Email

* Requester Name

Step 2

Enter the following information:

- If the Remit-To Address has No address selected, click on the magnifying glass and select the address for Bank Accounts. If there is an address, you can skip this action. **It is important to complete this step first.**
- General information including:
 - Your invoice number;
 - Your invoice date (payment terms start from this date);
 - Date of supply;
 - Select Choose File and upload the invoice generated from your invoicing system.
- Select the magnifying glass next to the "Customer Address", and "Choose" Illawarra Retirement Trust.



Choose an Address

Legal Entity Name	Line 1	Line 2	Line 3	Line 4	City	State	Postal Code	Country	Region	Actions
Illawarra Retirement Trust	PO Box 2106	None	None	None	Wollongong DC	NSW	2500	Australia		Choose

To

Customer IRT - Test

*** Customer Address** Illawarra Retirement Trust
PO Box 2106
Wollongong DC
NSW
Australia

*** Buyer ABN** 52 000 726 536

Ship to Address No address selected

*** Requester Email** jsmith@irt.org.au

*** Requester Name** John Smith

Step 3

Select the Buyer ABN dropdown and select the ABN number for IRT ending in 536.

Lines

Type	Description	Qty	UOM	Price
Qty	Mow&Edge - 31/03/202	1	Each	55

0.00

PO Line None **Service Sheet Line** None **Contract** **Supplier Part Number**

Visit ID None **WO Number** None **Client ID & Name** None

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	5.50	

Add Line **Pick lines from PO** **Pick lines from Contract** **Total Taxes**

Step 4

Scroll to the Lines section of your invoice and enter a description, quantity, UOM and Price (excluding GST).

A meaningful description will assist IRT with the approval process.

Enter the GST rate of either 0% or 10%.

If you are invoicing multiple items with different GST rates, you will need to "Add Line" for each item.

If the same GST applies for all items you can enter this as a single line. Please ensure the description reflects the multiple items you are invoicing.

[Click here](#) to follow the final steps in the invoicing process.

Lines

Type	Description	Qty	UOM	Price
Qty	Mow&Edge - 31/03/202	1	Each	55

0.00

PO Line None **Service Sheet Line** None **Contract** **Supplier Part Number**

Visit ID None **WO Number** None **Client ID & Name** None

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	5.50	

Add Line **Pick lines from PO** **Pick lines from Contract** **Total Taxes**

Lines

Type	Description	Qty	UOM	Price
Qty	Removal of waste	1	Each	50

0.00

PO Line None **Service Sheet Line** None **Contract** **Supplier Part Number**

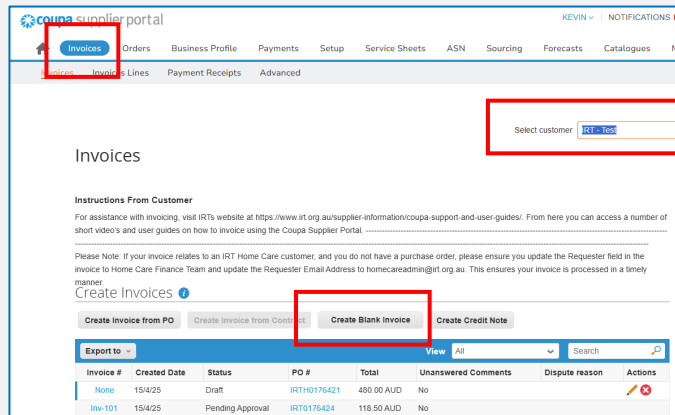
Visit ID None **WO Number** None **Client ID & Name** None

Taxes

GST Rate	GST Amount	Tax Reference
0.0%	0.00	

Select applicable GST per item

Submit an invoice against multiple Purchase Orders



Invoices

Instructions From Customer

Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

Create Invoices

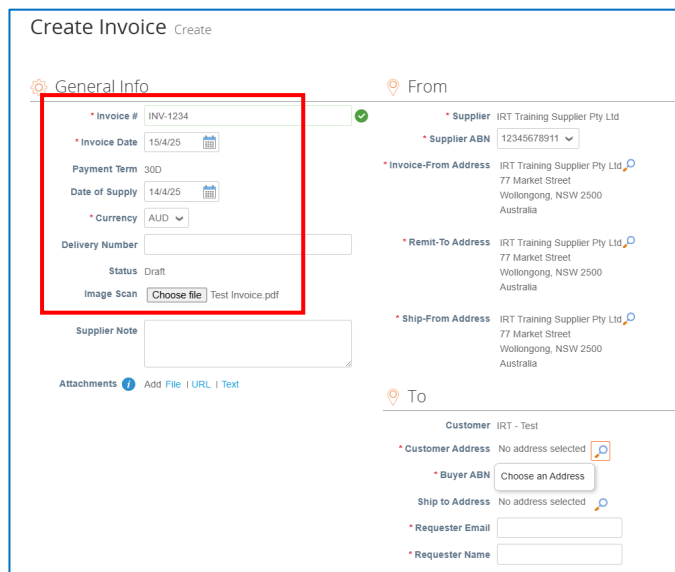
Create Invoice from PO Create Invoice from Contract **Create Blank Invoice** Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
None	15/4/25	Draft	IRT10176421	480.00 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT0176424	118.50 AUD	No		

Step 1

Click on the Invoices tab and make sure the “Select customer” is Illawarra Retirement Trust.

Select the **Create Blank Invoice** button.



Create Invoice Create

General Info

Invoice # INV-1234

Invoice Date 15/4/25

Payment Term 30D

Date of Supply 14/4/25

Currency AUD

Delivery Number

Status Draft

Image Scan **Choose file** Test Invoice.pdf

Supplier Note

Attachments Add File | URL | Text

From

Supplier IRT Training Supplier Pty Ltd

Supplier ABN 12345678911

Invoice-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

Remit-To Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

Ship-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

To

Customer IRT - Test

Customer Address No address selected

Buyer ABN Choose an Address

Ship to Address No address selected

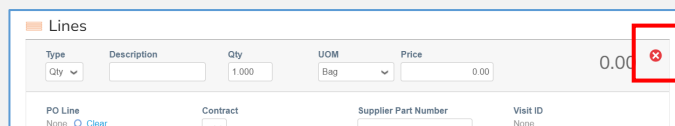
Requester Email

Requester Name

Step 2

Enter the following information:

- Your invoice number;
- Your invoice date (payment terms start from this date);
- Confirm Date of Supply date;
- Select **Choose File** and upload the invoice generated from your invoicing system.



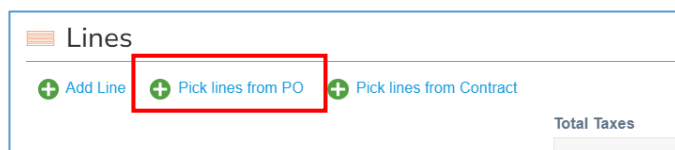
Lines

Type	Description	Qty	UOM	Price	
Qty		1.000	Bag	0.00	0.00

PO Line None Clear Contract Supplier Part Number Visit ID None

Step 3

Scroll down to the Lines section and click the red X to remove the blank invoice line.



Lines

+ Add Line **+ Pick lines from PO** + Pick lines from Contract

Total Taxes

Step 4

Select **Pick lines from PO**.



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

Pick Lines to Add

Invoice #Test555

Line	Desc	Total
0 Lines		

[Delete Invoice](#) [Finish](#)

View	All	Advanced	Search				
PO Number	Line #	Description	UOM	Qty	Price	Invoiced	Actions

IRTH0256533	1	Gardening Services	Hours	2	150.00	1	+
IRTH0256534	1	Domestic Assistance - 1 Hour Rate	Hours	3	55.00	1	+
IRTH0256541	1	Social Support - Weekday 1 Hour	Hours	3	55.00	0	+
IRTH0256543	1	Social Support - Weekday 1 Hour	Hours	2	55.00	0	+

Per page: 15 | 45 | 90 Show Count

Step 5

A list of open purchase orders will display. Use the search area to find the purchase order you are invoicing.

Pick Lines to Add

Invoice #Test555

Line	Desc	Total
0 Lines		

[Delete Invoice](#) [Finish](#)

View	All	Advanced	Search				
PO Number	Line #	Description	UOM	Qty	Price	Invoiced	Actions

IRTH0256533	1	Gardening Services	Hours	2	150.00	1	+
IRTH0256534	1	Domestic Assistance - 1 Hour Rate	Hours	3	55.00	1	+
IRTH0256541	1	Social Support - Weekday 1 Hour	Hours	3	55.00	0	+
IRTH0256543	1	Social Support - Weekday 1 Hour	Hours	2	55.00	0	+

Per page: 15 | 45 | 90 Show Count

Step 6

Select the green [+](#) button to add the purchase order lines to the invoice.

Repeat this process for any additional purchase order lines that need to be included under the same invoice number.

Pick Lines to Add

Invoice #Test555

Line	Desc	Total
1	Gardening Services	150.00

[Delete Invoice](#) [Finish](#)

View	All	Advanced	Search				
PO Number	Line #	Description	UOM	Qty	Price	Invoiced	Actions

IRTH0256534	1	Domestic Assistance - 1 Hour Rate	Hours	3	55.00	1	+
IRTH0256541	1	Social Support - Weekday 1 Hour	Hours	3	55.00	0	+
IRTH0256543	1	Social Support - Weekday 1 Hour	Hours	2	55.00	0	+

Pick Lines to Add

Invoice #Test555

Line	Desc	Total
2	Domestic Assistance - 1 Hour Rate	110.00
1	Gardening Services	150.00

[Delete Invoice](#) [Finish](#)

View	All	Advanced	Search				
PO Number	Line #	Description	UOM	Qty	Price	Invoiced	Actions

IRTH0256541	1	Social Support - Weekday 1 Hour	Hours	3	55.00	0	+
IRTH0256543	1	Social Support - Weekday 1 Hour	Hours	2	55.00	0	+

Step 7

Once all relevant purchase order lines have been added, select **Finish**.

Pick Lines to Add

Invoice #Test555

Line	Desc	Total
2	Domestic Assistance - 1 Hour Rate	110.00
1	Gardening Services	150.00

[Delete Invoice](#) [Finish](#)

View	All	Advanced	Search				
PO Number	Line #	Description	UOM	Qty	Price	Invoiced	Actions

IRTH0256541	1	Social Support - Weekday 1 Hour	Hours	3	55.00	0	+
IRTH0256543	1	Social Support - Weekday 1 Hour	Hours	2	55.00	0	+



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

Type	Description	Qty	UOM	Price	
	Domestic Assistance - 1 Hour Rate	2.0000	Hours	55.00	110.00

PO Line	Contract	Supplier Part Number	Visit ID
IRTH0256534-1		3	None

WO Number	Client ID & Name	Billing
None	C0177109 Denis Drake	30131-342050-1100-01-0

Taxes		
GST Rate	GST Amount	Tax Reference
	0.00	

Step 8

Review the invoice lines and adjust quantities if required.

Apply the appropriate GST rate to each line.

Total Taxes	
Lines Net Total	260.00
Lines GST Totals	0.00

Shipping	
GST	0.000
Tax Reference	Enter a tax reason description.

Total GST	0.00
Net Total	260.00
Gross Total	260.00

Delete	Cancel	Save as draft	Calculate	Submit
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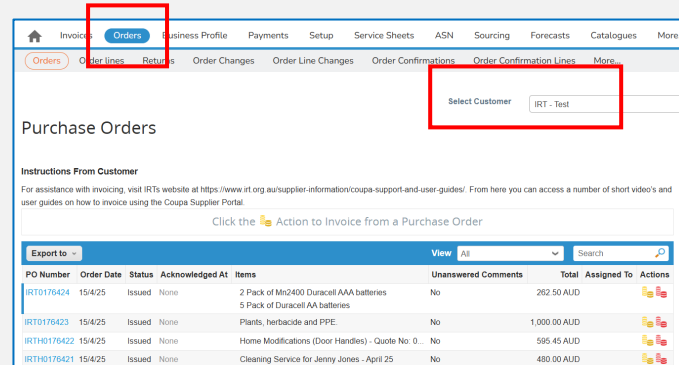
Step 9

Click **Calculate** to ensure the invoice total matches the invoice from your invoicing system.

Select **Submit**.

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Submit a credit note against a purchase order



Purchase Orders

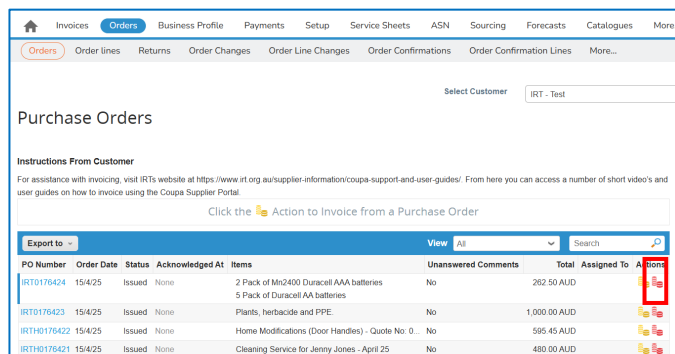
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IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE	No	1,000.00 AUD		
IRT0176422	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No. 0.	No	595.45 AUD		
IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25	No	480.00 AUD		

Step 1

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Purchase Orders

Instructions From Customer
For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

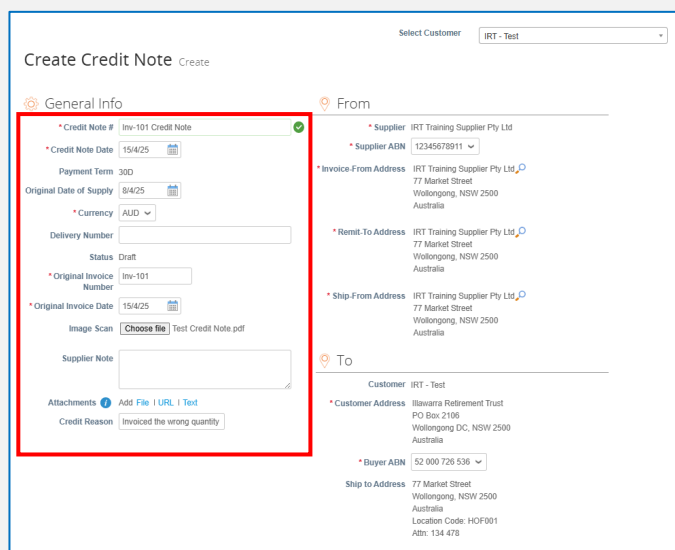
Click the  Action to Invoice from a Purchase Order

Export to	View	All	Search					
IRT0176424	15/4/25	Issued	None	2 Pack of Mx2400 Duracell AAA batteries 5 Pack of Duracell AA batteries	No	262.50 AUD		
IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE	No	1,000.00 AUD		
IRT0176422	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No. 0.	No	595.45 AUD		
IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25	No	480.00 AUD		

Step 2

Find the purchase order that you want to credit and select the Red Coin icon in the Actions column to the far right.

Note: If you require more information about the purchase order, click on the purchase order number to review the IRT requester, need by date and home care client name if applicable.



Create Credit Note

Select Customer: IRT - Test

General Info

- * Credit Note # Inv-101 Credit Note
- * Credit Note Date 15/4/25
- Payment Term 30D
- Original Date of Supply 8/4/25
- * Currency AUD
- Delivery Number
- Status Draft
- * Original Invoice Number Inv-101
- * Original Invoice Date 15/4/25
- Image Scan  Test Credit Note.pdf
- Supplier Note

From

- * Supplier IRT Training Supplier Pty Ltd
- * Supplier ABN 12345678911
- * Invoice-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia
- * Remit-To Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia
- * Ship-From Address IRT Training Supplier Pty Ltd, 77 Market Street, Wollongong, NSW 2500, Australia

To

- Customer IRT - Test
- * Customer Address Illawarra Retirement Trust, PO Box 2106, Wollongong, NSW 2500, Australia
- * Buyer ABN 52 000 726 536
- Ship to Address 77 Market Street, Wollongong, NSW 2500, Australia, Location Code: HOF001, Abn: 134 478

Attachments  Add File | URL | Text

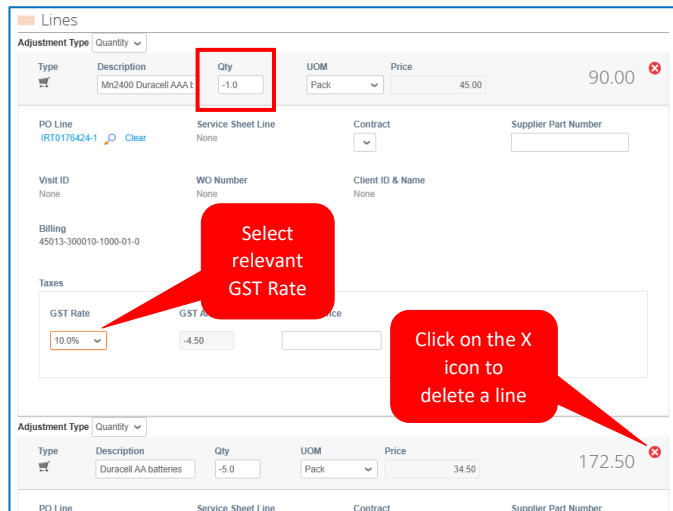
Credit Reason Invoiced the wrong quantity

Step 3

After clicking the Red Coin icon, you will land on the Create Credit Note screen. Enter the following information:

- Your credit note number;
- Your credit note date;
- Original date of supply;
- The invoice number you are crediting;
- Original invoice date;
- Image scan – This is where you will upload a copy of your credit note.
- Credit Reason
- If the Remit-To Address has No address selected, click on the magnifying glass and select the address for Bank Accounts. If there is an address, you can skip this action.

If you're creating a credit note against a bucket order [click here](#) to navigate back to the next step in that process, otherwise continue to Step 4 below.



Lines

Adjustment Type	Quantity	Type	Description	Qty	UOM	Price
			Mn2400 Duracell AAA t	-1.0	Pack	45.00
PO Line			IRT0176424-1			
Service Sheet Line			None			
Contract						
Supplier Part Number						
Visit ID			None			
WO Number			None			
Client ID & Name			None			
Billing			45013-300010-1000-01-0			
Taxes						
GST Rate			10.0%			
GST A			-4.50			
Price						
Adjustment Type	Quantity	Type	Description	Qty	UOM	Price
			Duracell AA batteries	-5.0	Pack	34.50
PO Line						
Service Sheet Line						
Contract						
Supplier Part Number						

Step 4

Scroll down to the lines section, which has populated all the information contained in the IRT purchase order that you have selected to credit. You must complete the following:

- Adjust the quantity or price (whichever one is not greyed out) if it doesn't match your credit note. This needs to be a negative number;
- If there are multiple lines and you are not crediting all lines, delete the lines not being credited;
- Select the relevant GST rate from the drop down menu for all lines.

[Click here](#) to follow the final steps in the credit note process.

Submit a credit note against a bucket purchase order

(All IRT purchase order amounts exclude GST. You will apply the relevant GST rate when crediting.)

A bucket purchase order can be a single line or multiple lines for the same service type, with each line representing a different time period, e.g. month. You can reuse a PO line for multiple credit notes, as long as the charges match the line description.

Purchase Orders

Instructions From Customer
For assistance with Invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to Invoice using the Coupa Supplier Portal.

Click the  Action to Invoice from a Purchase Order

Export to	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
	IRT0176424	15/4/25	Issued	None	2 Pack of Min2400 Duracell AAA batteries 5 Pack of Duracell AA batteries	No	262.50 AUD		
	IRT0176423	15/4/25	Issued	None	Plants, herbicide and PPE.	No	1,000.00 AUD		
	IRT0176425	15/4/25	Issued	None	Home Modifications (Door Handles) - Quote No. 6	No	595.45 AUD		
	IRT0176421	15/4/25	Issued	None	Cleaning Service for Jenny Jones - April 25 Cleaning Service for Jenny Jones - May 25 Cleaning Service for Jenny Jones - Jun 25 Cleaning Service for Jenny Jones - Jul 25	No	480.00 AUD		
	IRT0176131	24/2/25	Issued	None	3 Each of Test of K Client	No	750.00 AUD		

Step 1

Click [here](#) to follow the first three steps of this process. These steps are the same for all PO backed credit notes.

Lines

Adjustment Type: **Credit**

Type	Description	Price
	Cleaning Service for Je	-65.00

PO Line: IRT0176421-1  Clear

Service Sheet Line: None

Contract: 

Supplier Part Number:

Visit ID: WO Number: Client ID & Name:

Use Red X to delete all other lines

Step 2

Scroll down to the lines section, which has populated all the information contained in the IRT purchase order that you have selected to credit. Find the relevant line that you are crediting by clicking into the description of each line and scrolling across to the right to view the full description.

Once you have identified the correct line to credit, **you must use the red cross icon to delete all other lines not being credited, otherwise the credit note will fail approval.** You can ignore this step if you are crediting a single line bucket purchase order.



COUPA SUPPLIERS

QUICK REFERENCE GUIDE

Lines

Adjustment Type Price

Type	Description	Price
Gutter Cleaning		-200.00

PO Line: IRT0204002-1

Service Sheet Line: None

Contract: [Dropdown]

Supplier Part Number: [Text Box]

Visit ID: None

WO Number: None

Client ID & Name: C0199999 Jimmy Barnes

Billing: 30131-342050-1100-01-0

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	-20.00	

+ Add Line + Pick lines from PO + Pick lines from Contract Totals & Taxes

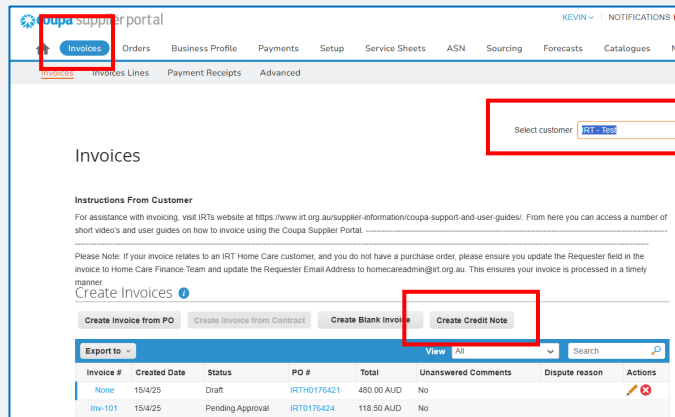
Step 3

Adjust the quantity or price (whichever one is not greyed out) if it doesn't match your credit note. This needs to be a negative number.

Select the relevant GST Rate from the drop down menu.

[Click here](#) to follow the final steps in the credit note process.

Submit a credit note without a purchase order



Invoices

Instructions From Customer

For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

Create Invoices

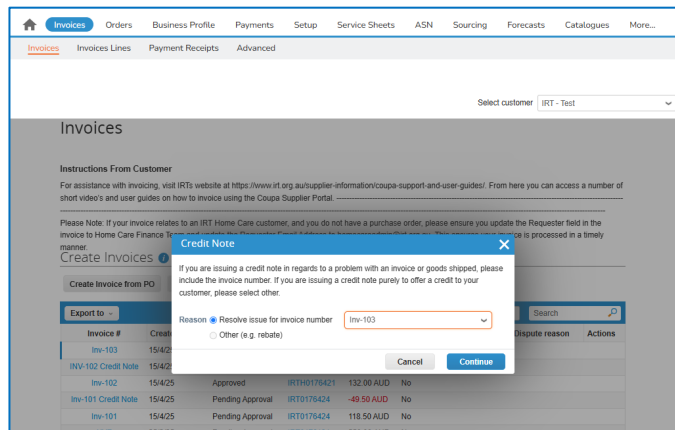
Create Invoice from PO Create Invoice from Contract **Create Blank Invoice** **Create Credit Note**

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
None	15/4/25	Draft	IRT10176421	480.00 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT10176424	118.50 AUD	No		

Step 1

Click on the Invoices tab and make sure the "Select customer" is Illawarra Retirement Trust.

Select the "Create Credit Note" button.



Invoices

Instructions From Customer

For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

Create Invoices

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

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

Reason: Resolve issue for invoice number **Inv-103**

☐ Other (e.g. rebate)

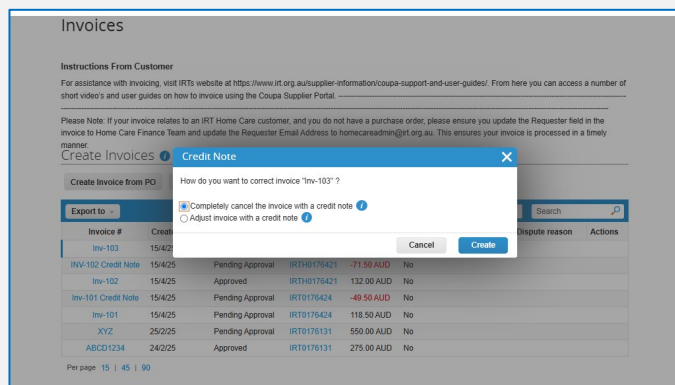
Cancel Continue

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
Inv-103	15/4/25	Pending Approval	IRT10176421	132.00 AUD	No		
Inv-102	15/4/25	Pending Approval	IRT10176421	-49.50 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT10176424	118.50 AUD	No		
XYZ	25/2/25	Pending Approval	IRT10176131	550.00 AUD	No		

Step 2

In the pop up, select the invoice you want to credit from the drop down list.

Select Continue



Invoices

Instructions From Customer

For assistance with invoicing, visit IRT's website at <https://www.irt.org.au/supplier-information/coupa-support-and-user-guides/>. From here you can access a number of short video's and user guides on how to invoice using the Coupa Supplier Portal.

Please Note: If your invoice relates to an IRT Home Care customer, and you do not have a purchase order, please ensure you update the Requester field in the invoice to Home Care Finance Team and update the Requester Email Address to homecareadmin@irt.org.au. This ensures your invoice is processed in a timely manner.

Create Invoices

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

Credit Note

How do you want to correct invoice "Inv-103"?

☒ Completely cancel the invoice with a credit note

☐ Adjust invoice with a credit note

Cancel Create

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute reason	Actions
Inv-103	15/4/25	Pending Approval	IRT10176421	132.00 AUD	No		
Inv-102	15/4/25	Pending Approval	IRT10176421	-49.50 AUD	No		
Inv-101	15/4/25	Pending Approval	IRT10176424	118.50 AUD	No		
XYZ	25/2/25	Pending Approval	IRT10176131	550.00 AUD	No		
ABC1234	24/2/25	Approved	IRT10176131	275.00 AUD	No		

Per page: 15 | 45 | 90

Step 3

Select the appropriate action based on what you are crediting. Hover over the "i" to confirm which option you wish to use.

Select "Create"

Create Credit Note Create

Select customer IRT - Test

This credit note applies to invoice Inv-103. When approved, the credit will adjust the invoice's impact to the transaction.

General Info

* Credit Note # Inv-103 Credit Note

* Credit Note Date 15/4/25

Payment Term 30D

Original Date of Supply 15/4/25

* Currency AUD

Delivery Number

Status Draft

Original Invoice Number Inv-103

Original Invoice Date 15/4/25

Image Scan Test Credit Note.pdf

Supplier Note

Attachments

Credit Reason Incorrectly charged

From

* Supplier IRT Training Supplier Pty Ltd

* Supplier ABN 12345678911

* Invoice-From Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

* Remit-To Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

* Ship-From Address IRT Training Supplier Pty Ltd
77 Market Street
Wollongong, NSW 2500
Australia

To

Customer IRT - Test

* Customer Address Illawarra Retirement Trust
PO Box 2106
Wollongong DC, NSW 2500
Australia

Step 4

Enter the following information:

- If the Remit-To Address has No address selected, click on the magnifying glass and select the address for Bank Accounts. If there is an address, you can skip this action. It is important to complete this step first.
- Your credit note number;
- Your credit note date;
- Image scan – This is where you will upload a copy of your invoice.
- Credit Reason

Adjust

Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
Qty	Mow & Edge 31/3/25	-1.0	Hours	65.00	-65.00

PO Line None Service Sheet Line None Contract Supplier Part Number

Visit ID None WO Number None Client ID & Name None

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	-6.50	

Total Taxes

Step 5

Scroll down to the lines section, which has populated all the information contained in the IRT purchase order that you have selected to credit.

If you selected to adjust the invoice you are crediting:

- Adjust the quantity or price (whichever one is not greyed out) if it doesn't match your credit note. This needs to be a negative number.
- If there are multiple lines and you are not crediting all lines, delete the lines not being credited;

Cancel

Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
Qty	Mow & Edge 31/3/25	-2.0000	Hours	65.00	-130.00

PO Line None Service Sheet Line None Contract Supplier Part Number

Visit ID None WO Number None Client ID & Name None

Taxes

GST Rate	GST Amount	Tax Reference
10.0%	-13.00	

Total Taxes

If you selected to cancel the invoice you are crediting

- The credit is for the full invoice amount, it cannot be edited.

[Click here](#) to follow the final steps in the credit note process.