#### How to Create a Credit Note

Log into the Coupa Supplier Portal - <u>https://supplier.coupahost.com</u> with your credentials when you first registered. If you forgot your password, click on "Forgot Your Password?" and Coupa will send an auto generated email to you. If you did not receive the email, check your Spam/Junk Folder.

🗱 coupa supplier portal		Secure
	Login	
	• Email	
	• Password	
	Eoroph your propulsed?	
	Login	
	New to Coupa? CREATE AN ACCOUNT	

After logging in, you will see the Homepage of your CSP.

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lome Profile O	rders Service/Time Shee	ts ASN	Invoices	Catalogs	Business Performa	ince Sourcin	g Add-ons	Setup
Verify Y Coupa Verified	OUT ACCOUNT	e visible and	l trusted by	thousands (	of customers.			
New S Profile Progress 41	Supplier Se % Last Updated: 20 days ago   V	tup Ger New Profile	t Verified					-
Recent Activity	/				View 🗸 👔	Announ	cements	
Compass						Compass 14 Sep 2023		New
Compass Order # 90224 Compass . 100.0 . USD . Not	t Invoiced				Issued Sep 14	Compass 14 Sep 2023 Compass - No 9.14.23 - suppliers to 1	<b>ew Invoice Requir</b> Compass now list PO number a	New ements requires all nd Requester
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Click on the "**Invoices**" tab in the blue ribbon. Select your customer by clicking the dropdown menu on the top right section. Scroll to the Create Invoices Section. Click on "**Create Credit Note**".

coup	a supplier p	ortal					NEW SUPPLIER	<ul> <li>NOTIFICA</li> </ul>	TIONS
lome	Profile Or	ders Service	e/Time Sheets	5 ASN	Invoices Catalogs	Business Performance	Sourcing	Add-ons	Setup
nvoices	Invoices Lines	Payment Recei	pts						
	i You hav	e 1 customer an	nouncements	related to inv	oices (Compass) View Al	Announcements			
						Select Customer			
						Select Customer	Compass		
	Invoice	2S							
	Instructions	From Customer							
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A new screen will appear giving the option to "Resolve issue for invoice number" with a dropdown of all applicable invoices.

Once you have selected the invoice to apply for the credit note, you will need to select if the credit memo is for the full amount or partial amount of the invoice.

Credit Note	×
If you are issuing a credit note in regards to a pr include the invoice number. If you are issuing a customer please select other.	oblem with an invoice or goods shipped, please credit note purely to offer a credit to your
Reason  Resolve issue for invoice number Other (e.g. rebate)	CSP0914 ~
	Cancel Continue

Select the appropriate option to correct the invoice. Then click "Create"



Coupa will redirect you to the Credit Notes page where you will need to enter the Credit Note number . If you have a PDF credit note, please attach it to the credit note.

<b>@coup</b> a	suppli	erportal					N	IEW SUPPLIEF	R~   NOTIFIC	CATIONS
Home	Profile	Orders	Service/Time Sheets	ASN Invo	ices Catalogs	Business Pe	erformance	Sourcing	Add-ons	Setu
Invoices	Invoices Li	nes Paym	ent Receipts							
	🔺 You	have 1 cust	omer announcements rei	ated to Invoices	(Compass) <u>View Al</u>	Announcement	<u>ts</u>			
	Crea	te Cre	dit Note Create			Sele	ect Customer	Compass		
	This cre	dit note applie	s to invoice CSP0914. When	approved, the cre	dit will adjust the invoid	ce's impact to the	transaction.			
	🔅 Ge	eneral In	fo		Fro	om				
	,	Credit Note	# 091423		•	* Supplier	New Supplier Se	etup		
	• Cr	edit Note Dat	e 09/14/23		Supplie	er Tax Number	$\sim$			
		Payment Terr	n	$\sim$	* Invoice	From Address	New Supplier Se	etup		
		* Currenc Statu	y USD s Draft				delray, beach 33 United States	3122		
	Ori	ginal Invoice	# CSP0914		* Ren	nit-To Address	New Supplier Se	etup		
	Origina	al Invoice Dat	e 09/14/23	_			123 main street delray beach, fl	33121		
	* Invoi	ce Attachmer	t Choose File Invoice.p	df			United States			
		Supplier Not	e		* Ship	From Address	New Supplier Se 123 main street delray beach , fl United States	etup   33121		
		Attachment	s Add File   URL   Text							

Verify the Credit Note Amount, the click "Submit"

Lines				Line Level Taxatio
stment Type	Price 🗸			
Type	Description Supplies	Price	-200.00	-200.00
PO Line 90224-1		Service/Time Sheet Line None	Contract	Supplier Part Number
Billing Note				
Billing 69-861003-1	10-44			
Add Line	Pick lines from C	ontract	Totals & Taxes	-200.00
			Shipping	
			Handling	
			Miso	
			Tax	♥ 0.000 % 0.000
			Total Tax	0.00
			Total Tax Net Total <b>Total</b>	0.00 -200.00 <b>-200.00</b>

Confirm the information, then click "Send Credit Note"



A green banner will appear indicating that the Credit Note has been approved.

Invoices										
New Supplier Setup credit note #091423 approved										
Instructions F	rom Customer									
In order to ensure timely invoice processing, please review our invoicing guidelines by copying and pasting the link below into the URL and navigating to https://drive.google.com/file/d/1yukcwh-iGQBQix8R4MXm80rtan1leAwM/view?usp=sharing Create Invoices 1										
Create Invoi	ce from PO	reate Invoic	e from C	ontract	Create Blank Invoice	Create Credit Note				
Export to ~						View All	✓ Search	₽.		
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason		Actions		
091423	09/14/23	Approved	90224	-200.00	No					
CSP 091423	09/14/23	Disputed	90223	300.00	Yes	Price different from PC	D/Contract or Catalog			
CSP0914	09/14/23	Approved	90224	200.00	No					
None	09/14/23	Draft	90224	100.00	No			18		
Per page 15	45   90									