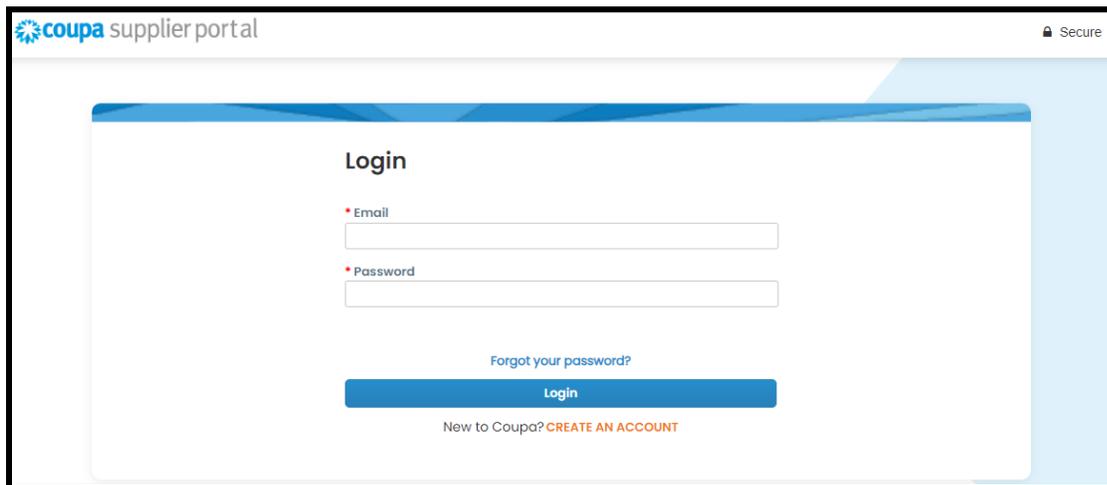


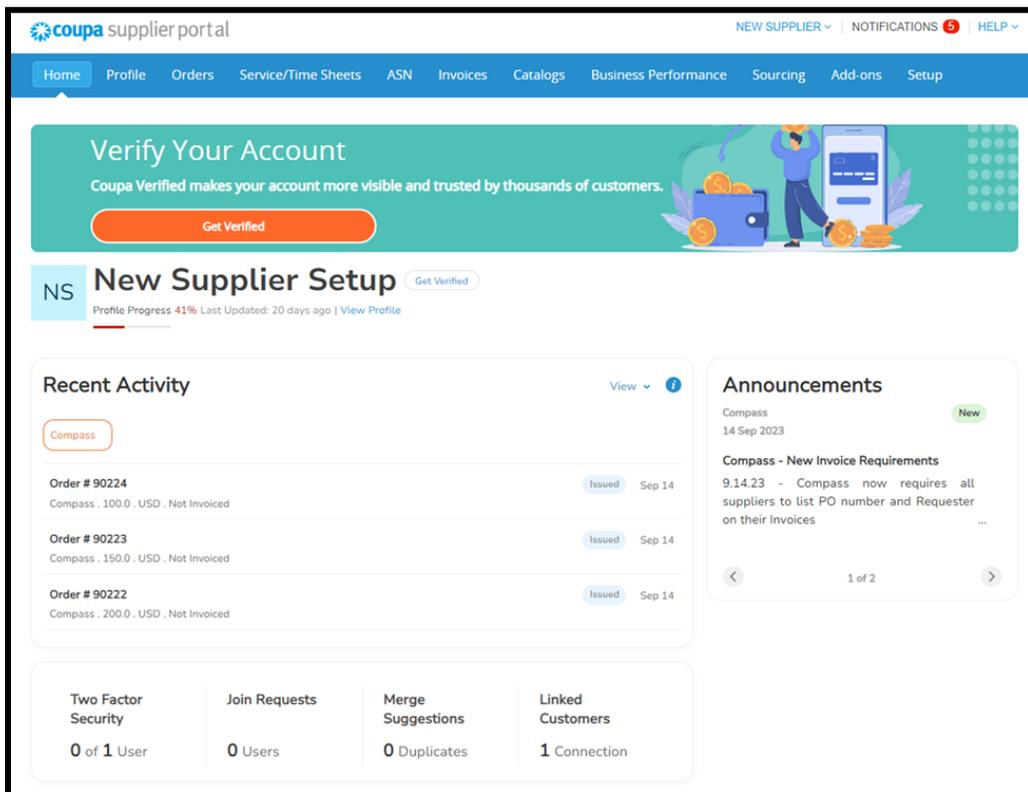
# COMPASS

## How to Create a Credit Note

Log into the Coupa Supplier Portal - <https://supplier.coupahost.com> 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.

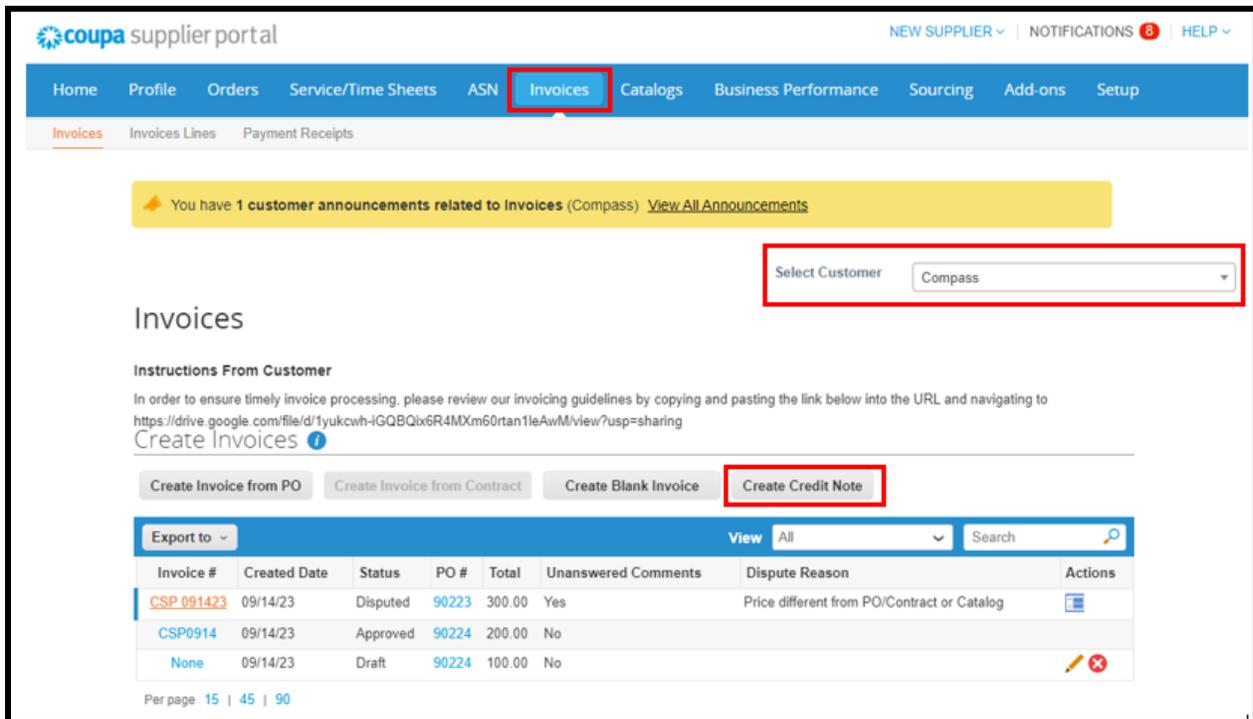


After logging in, you will see the Homepage of your CSP.



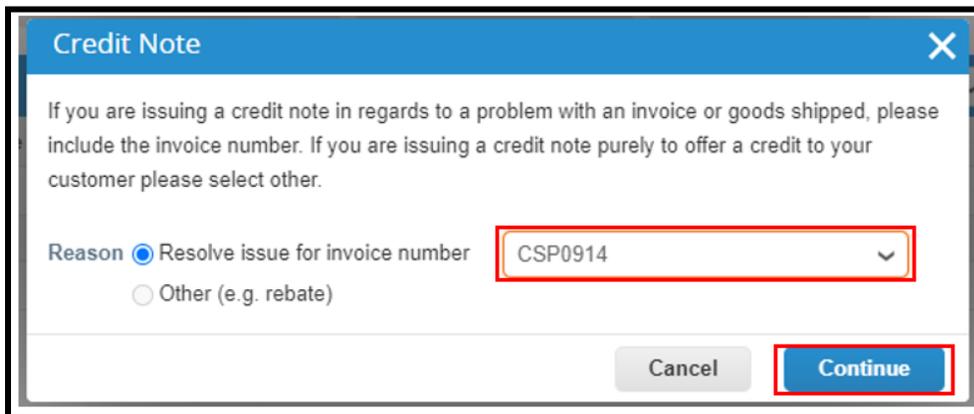
# COMPASS

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**”.



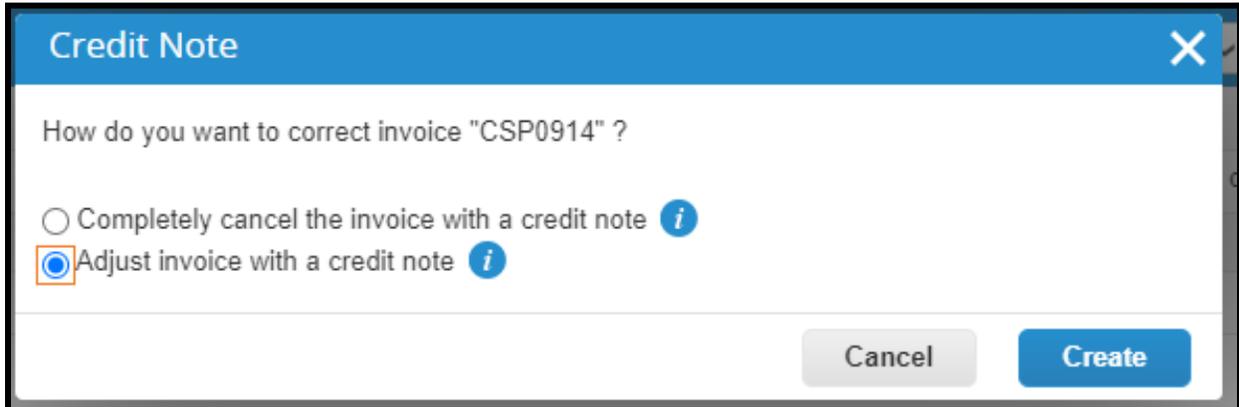
A new screen will appear giving the option to “Resolve issue for invoice number” with a dropdown of all applicable invoices.

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.



# COMPASS

Select the appropriate option to correct the invoice. Then click “Create”



Credit Note

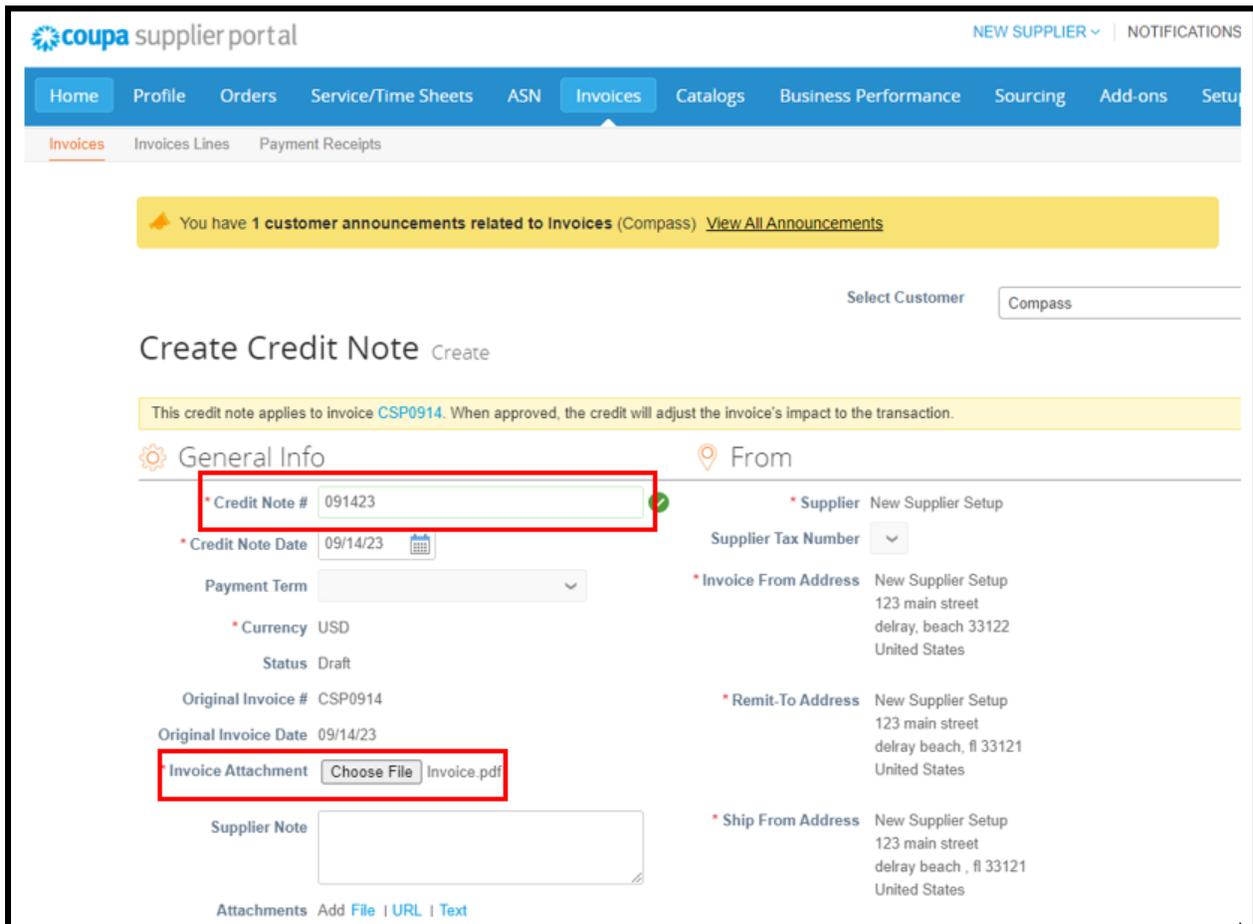
How do you want to correct invoice "CSP0914" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel 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.



coupa supplier portal

NEW SUPPLIER | NOTIFICATIONS

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

You have 1 customer announcements related to Invoices (Compass) [View All Announcements](#)

Select Customer

### Create Credit Note [Create](#)

This credit note applies to invoice [CSP0914](#). When approved, the credit will adjust the invoice's impact to the transaction.

**General Info**

\* Credit Note #  ✓

\* Credit Note Date

Payment Term

\* Currency USD

Status Draft

Original Invoice # CSP0914

Original Invoice Date 09/14/23

Invoice Attachment  Invoice.pdf

Supplier Note

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

**From**

\* Supplier New Supplier Setup

Supplier Tax Number

\* Invoice From Address New Supplier Setup  
123 main street  
delray, beach 33122  
United States

\* Remit-To Address New Supplier Setup  
123 main street  
delray beach, fl 33121  
United States

\* Ship From Address New Supplier Setup  
123 main street  
delray beach , fl 33121  
United States

Verify the Credit Note Amount, the click “Submit”

# COMPASS

Lines Line Level Taxation

Adjustment Type Price

Type	Description	Price	
	Supplies	-200.00	-200.00 <span style="color: red;">✖</span>

PO Line: 90224-1    Service/Time Sheet Line: None    Contract:     Supplier Part Number:

Billing Note:

Billing: 69-661003-10-44

[+ Add Line](#)   [+ Pick lines from Contract](#)

Totals & Taxes

Lines Net Total	-200.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 0.000 % <input type="text"/> 0.000
Total Tax	0.00
Net Total	-200.00
<b>Total</b>	<b>-200.00</b>

Confirm the information, then click “Send Credit Note”

**Are You Ready to Send?** ✕

You're about to send an credit note to Compass for a total amount of -200.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.

# COMPASS

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

## Invoices

New Supplier Setup credit note #091423 approved✕

**Instructions From 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-iGQBQix6R4MXm80rtan1eAwM/view?usp=sharing>

Create Invoices ?

Create Invoice from POCreate Invoice from ContractCreate Blank InvoiceCreate Credit Note

Export to ▼View All ▼Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">091423</a>	09/14/23	Approved	<a href="#">90224</a>	-200.00	No		
<a href="#">CSP 091423</a>	09/14/23	Disputed	<a href="#">90223</a>	300.00	Yes	Price different from PO/Contract or Catalog	<span style="color: blue;">📄</span>
<a href="#">CSP0914</a>	09/14/23	Approved	<a href="#">90224</a>	200.00	No		
<a href="#">None</a>	09/14/23	Draft	<a href="#">90224</a>	100.00	No		<span style="color: orange;">✎</span> <span style="color: red;">✕</span>

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