

Creating a Credit Note


About this Guide

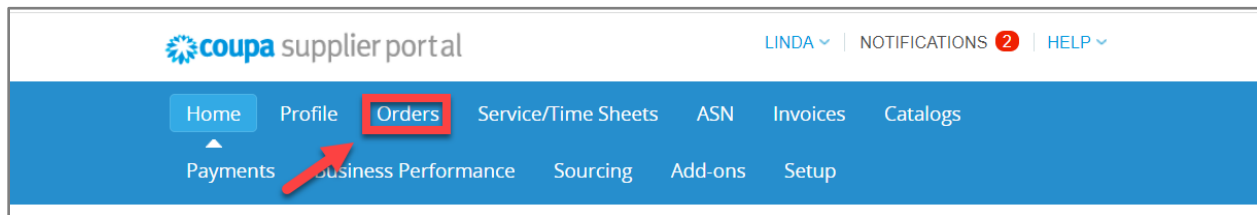
This guide will describe 2 ways to create a credit note. The first example is creating a credit note from a **Purchase Order (PO)** the second example is creating a credit note from an **Invoice**.

Creating a Credit Note from a PO

Step 1:


Login to the **Coupa Supplier Portal**. Click on the **Orders** tab to view Purchase Orders















and find the PO you need to apply a Credit Note. Click on the stack of red coins () in the **Actions** column OR click the PO #.



Purchase Orders

Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
11342347	01/03/23	Issued	None	1 Bag of Birthday Cake	No	100.00 USD		
11342339	12/21/22	Issued	None	2 Bag of Dog Boots 2 Each of Dog Socks	No	540.00 USD		
11342250	11/22/22	Issued	None	Large Service PO	No	10,000.00 USD		  
11342247	11/22/22	Issued	None	Service PO	No	250.00 USD		  
11342243	11/22/22	Issued	None	1 Each of Trampoline	No	10.00 USD		 
11342232	11/22/22	Issued	None	1 Each of Dog Belt	No	500.00 USD		 
11342227	11/22/22	Issued	None	10 Each of Dog Shoes	No	100.00 USD		 

Creating a Credit Note

Step 2:

Coupa will direct you to the **Create Credit Note** where you can create the Credit Note similarly to creating an Invoice.

Fields with a red asterisk (*) must be populated. You will notice that many of the fields have been pre-populated and are not editable as this information is carried over from the initial invoice.

Note: If you have a credit note pdf, please attach it in the **Attachments** section of the credit note.

Create Credit Note Create

General Info

- * Credit Note # Test-2/9/23Lc
- * Credit Note Date 02/09/23
- Payment Term NET 75
- * Currency USD
- Status Draft
- * Original Invoice # 2-8-23 TestLc
- * Original Invoice Date 02/08/23
- Image Scan Choose File No file chosen
- Supplier Note Testing Credit Note for 2023 Guides
- Attachments Add File | URL | Text

From

- * Supplier John's Icehouse \ 888888_8
- Supplier Tax ID 1234567890
- * Invoice From Address John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States
- * Remit-To Address John's Icehouse
456 Bungalow Road
Seattle, WA 98765
United States
- Bank Name: America Bank
- Beneficiary Name: John's Icehouse
- Bank Account Number: *****3456
- Routing Number: *****6789
- * Ship From Address John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States

Creating a Credit Note

Step 3:

Under the **Lines** section, please add the **Adjustment Type** (Quantity, Price, Other).

Click on **Calculate** to confirm designated credit note (*your total **must be negative***) then click on **Submit**.

The screenshot displays a software interface for creating a credit note. The 'Lines' section is highlighted with a red box. A dropdown menu for 'Adjustment Type' is open, showing 'Quantity', 'Price', and 'Other' options, with 'Price' selected and a red arrow pointing to it. The line details show a quantity of 4,000, a unit of measure of 'Bag', and a price of -100.00, resulting in a total of -400.00. The 'Totals & Taxes' section shows a net total of -400.00. The 'Calculate' and 'Submit' buttons are highlighted with red boxes.

Type	Qty	UOM	Price	Total
Price	4,000	Bag	-100.00	-400.00

Totals & Taxes

Lines Net Total	-400.00
Shipping	
Misc	
Tax	0.000 % -0.00
Total Tax	0.00
Net Total	-400.00
Total	-400.00

Total must be negative

Buttons: Delete, Cancel, Save as Draft, **Calculate**, **Submit**

Creating a Credit Note

The following confirmation screen will appear. If your total is correct, click on **Send Credit Note**.

Are You Ready to Send? ✕

You're about to send an credit note to **Waste Management** for a total amount of **-400.00**. Once sent, you'll have to contact your customer directly to make changes to the credit note.

[Continue Editing](#) [Send Credit Note](#)

Step 4:

It will take you back to the following message.

Invoices

John's Icehouse \ 888888_8 credit note #Test-2/9/23Lc is processing

When you return to the invoice, it will indicate that the invoice is associated with credit notes with the link to the credit note.

Select Customer Waste Management - John's Icehouse

Invoice #INVServiceSmall [Back](#)

This invoice is associated with credit note(s): [TestCreditLc](#).

General Info


Invoice # INVServiceSmall
Invoice Date 11/28/22
Payment Term NET 75
Currency USD
Status Approved
Shipping Term None
Invoice PDF Document [download](#)
Image Scan None
Supplier Notes None
Attachments None


Bill To & Ship To

Supplier John's Icehouse \ 888888_8
Invoice From John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States
Remit To John's Icehouse
456 Bungalow Road
Seattle, WA 98765
United States
Ship From John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States
Bank Name: America Bank
Beneficiary Name: John's Icehouse

Creating a Credit Note

Once the Credit Note is approved, you will receive an email notifying you.

Powered by 



Credit Note #TestCreditLc is Approved to Pay by Waste Management

Hello Linda,


Your Credit Note #TestCreditLc has been approved to pay by your customer, Waste Management . No further action is required but you can click below for real time status or additional details.

If your customer's process is to mark the Credit Note as 'Paid' in Coupa, you will get a notification at that time with instructions for payment details.


If you have any questions you can simply contact your customer through normal channels or enter a comment on the Credit Note.

[View Credit Note](#)


Manage your invoices and more with Coupa



Insight




Opportunity



Collaboration

[Log In Now](#)

[Learn more about Coupa](#)


Business Spend Management

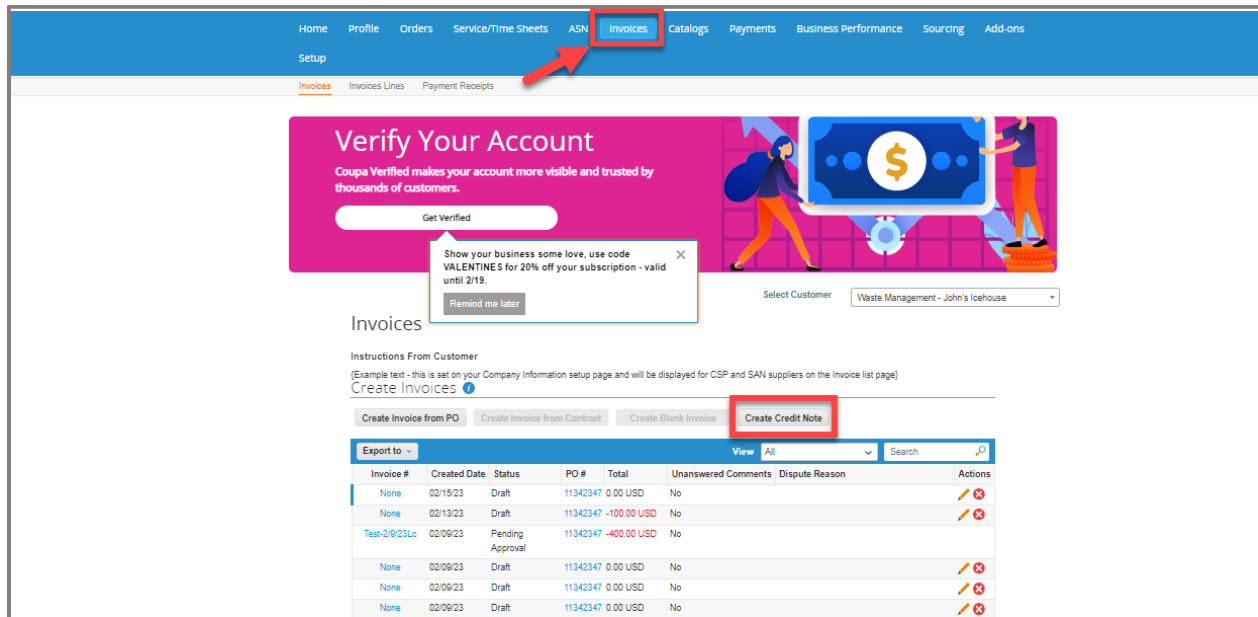
Creating a Credit Note

Creating a Credit Note from an Invoice

Step 1 *(from invoice):*

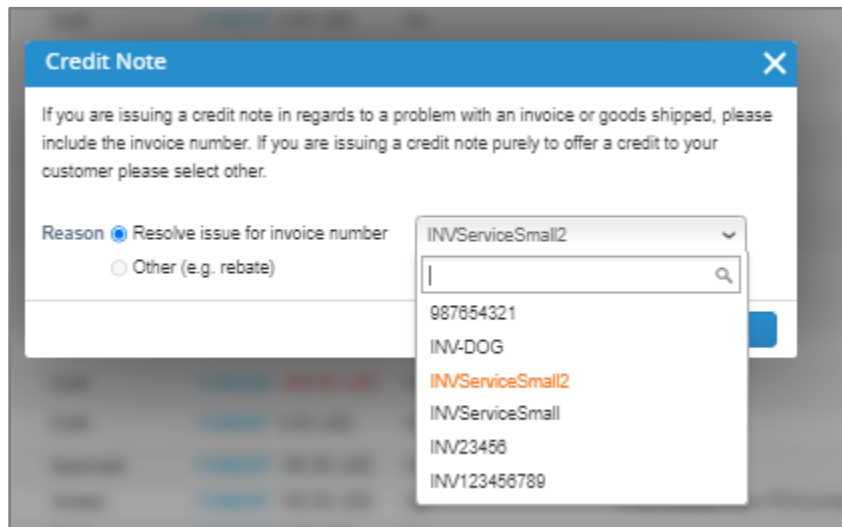
At the Coupa Home page click on the Invoices tab.

Click on “Create Credit Note”.



Step 2 *(from invoice):*

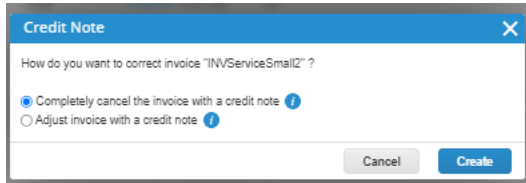
In the next screen, choose the invoice # from the drop down for which you are issuing the credit and click continue.



Creating a Credit Note

Click on the appropriate task of Credit Note:

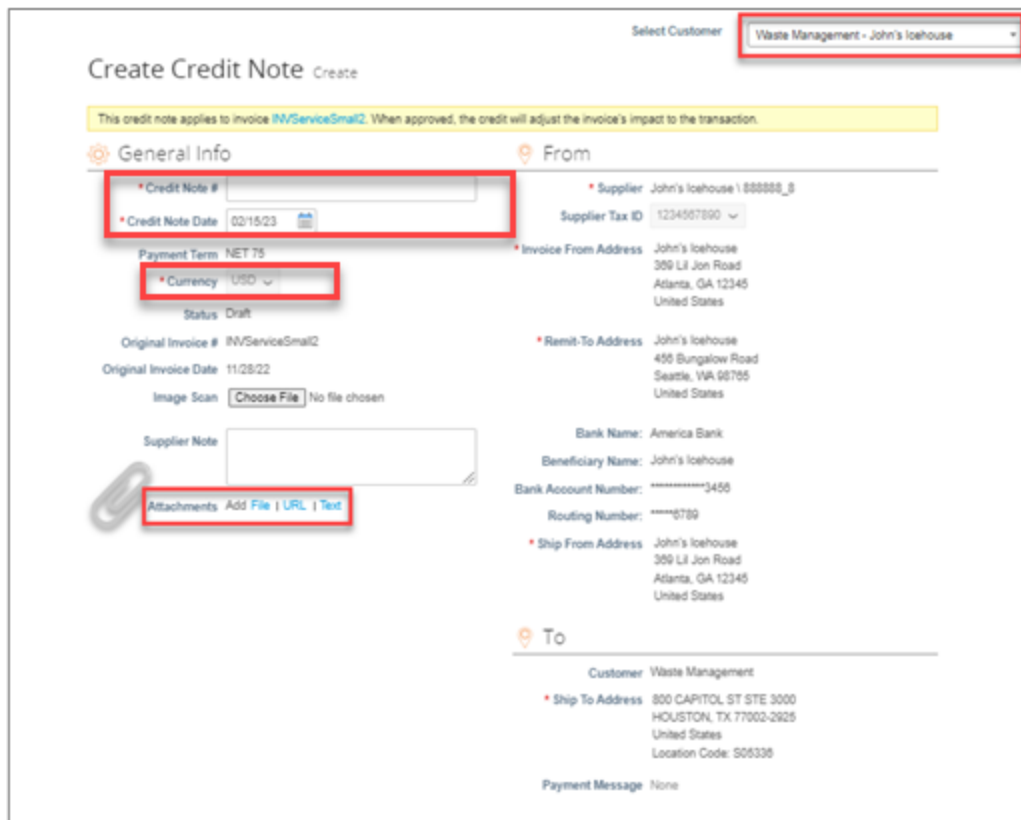
- Completely cancel the invoice with a credit note or
- Adjust invoice with a credit note.



Step 3 *(from invoice)*:

The form to create credit note appears.

- Enter the fields showing an asterisk (*).
- **Select Customer** - Waste Management
- Upload any **Attachments**



Creating a Credit Note

In the “**Lines**” section of the form, enter the credit amount in the **Price** field. Click on **Calculate** and once it shows the correct amount, click on **Submit**.

The screenshot shows a software interface for creating a credit note. The main section is titled "Lines" and includes a dropdown for "Adjustment Type" set to "Price". Below this, there is a table with columns for "Type", "Description", "Price", and a red "X" icon. The "Price" field is highlighted with a red box and contains the value "-500.00". Below the table, there are fields for "PO Line", "Service/Time Sheet Line", "Contract", "Supplier Part Number", "Unit Number", and "A/R Number". At the bottom of the form, there is a "Totals & Taxes" section with a table showing "Lines Net Total" as -500.00, "Shipping" as 0.00, "Misc" as 0.00, "Total Tax" as 0.00, "Net Total" as -500.00, and "Total" as -500.00. At the bottom of the form, there are buttons for "Delete", "Cancel", "Save as Draft", "Calculate", and "Submit". The "Calculate" and "Submit" buttons are highlighted with red boxes.

Step 4 *(from invoice):*

The following screen will appear confirming the total amount of your credit.

The screenshot shows a confirmation dialog box titled "Are You Ready to Send?". The text inside reads: "You're about to send an credit note to Waste Management for a total amount of -500.00. Once sent, you'll have to contact your customer directly to make changes to the credit note." At the bottom, there are two buttons: "Continue Editing" and "Send Credit Note".

Creating a Credit Note

Step 5 *(from invoice)*:

It will take you back to the following message.

Invoices


John's Icehouse \ 888888_8 credit note #Test-2/9/23Lc is processing

When you return to the invoice, it will indicate that the invoice is associated with credit notes with the link to the credit note.

Select Customer Waste Management - John's Icehouse

Invoice #INVServiceSmall [Back](#)

This invoice is associated with credit note(s): [TestCreditLc](#).

 **General Info**

Invoice # INVServiceSmall

Invoice Date 11/28/22

Payment Term NET 75

Currency USD

Status Approved


Shipping Term None

Invoice PDF Document [download](#)

Image Scan None

Supplier Notes None

Attachments None

 **Bill To & Ship To**

Supplier John's Icehouse \ 888888_8

Invoice From John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States

Remit To John's Icehouse
456 Bungalow Road
Seattle, WA 98765
United States


Ship From John's Icehouse
369 Lil Jon Road
Atlanta, GA 12345
United States


Bank Name: America Bank

Beneficiary Name: John's Icehouse

Creating a Credit Note

Once the Credit Note is approved, you will receive an email notifying you.

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Credit Note #TestCreditLc is Approved to Pay by Waste Management

Hello Linda,


Your Credit Note #TestCreditLc has been approved to pay by your customer, Waste Management . No further action is required but you can click below for real time status or additional details.

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