



# Supplier Portal

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## Raising A Credit Note



Home

Profile

Orders

Service/Time Sheets

ASN

Invoices

Catalogues

Business Performance

Sourcing

Add-ons

Setup

## Step One

Select Invoices tab from main menu

 44% Complete  about 2 months ago

### Profile Summary



1

Legal Entity

[View](#)



1

Registered User

[View](#)


1

Connected Customer

 Banking Info  Diversity  Accelerate   Bribery Policy

Sadia Limited Estates

Website  <https://www.sadiaestates.com>

Industry  Plumbing, heat and air-conditioning...

On the Landing page  
select "Invoices" to  
go to your list of  
raised invoices

Announcements [View All \(0\)](#)

One-Click Savings [View All](#)



**Start saving today!**

Explore deals for your company, exclusive to the Coupa Community.

### Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

### Latest Customers

FirstPort

## Step Two

### Select Create Credit Note

Agues Business Performance Sourcing Add-ons Setup

Select Customer

FirstPort ▾

## Invoices

Create Invoices ⓘ

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note







Export to ▾

Click 'Create Credit Note'

View

All ▾

Search 🔍

Invoice #	Created	Status	Invoice ID	Gross Total	Unanswered Comments	Dispute reason	Actions
CN 2000	23/02/2021	Pending Approval	1012601	-20.00 GBP	No		
None	23/02/2021	Draft	1012600	160.00 GBP	No		 
None	23/02/2021	Draft	1012600	160.00 GBP	No		 
CN 1000	23/02/2021	Pending Approval	1012622	-160.00 GBP	No		
MD Test CN1	23/02/2021	Pending Approval	1012623	-180.00 GBP	No		
None	23/02/2021	Draft	1012680	0.00 GBP	No		 



## Step Three

### Find the right invoice

**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  ▼

☐ Other (e.g. rebate)

Cancel Continue

Click the dropdown  
arrow to find the  
correct invoice

## Step Four

Check the Invoice Number and create the 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 ☐ Other (e.g. rebate)

Check the Invoice  
Number then click  
'Continue'

## Step Five

### Cancel or Adjust Invoice with a credit note

MD100	01/02/2021	Pending Approval	1012619	160.00 GBP	No
Credittest	19/01/2021	Approved	1012600	-160.00 GBP	No
mdtest	18/01/2021	Pending Approval	1012623	180.00 GBP	No
md0006					
MD0005					
register test 3					
Register test 2					
Jess register test					
MD003					
Lyn15019					
Jesstest13	2021	Approved	1012595	160.00 GBP	No
		Pending Approval	1012593	160.00 GBP	No
		Pending Approval	1012592	195.00 GBP	No
		Pending Approval	1012531	450.00 GBP	No
		Pending Approval	1012539	60.00 GBP	No
69794750	24/11/2020	Pending Approval	1012542	90.00 GBP	No

### Credit Note

How do you want to correct invoice "Jesstest13" ?

☒ Completely cancel the invoice with a credit note *i*

☐ Adjust invoice with a credit note *i*

Cancel Create

Choose your option  
and click "Create"  
to raise the credit note



## General Info



From

\* Credit Note #

CN1500



\* Credit Note Date

24/02/2021



Payment Term

END1M

Original Date of Supply

18/01/2021



\* Currency

GBP



Delivery Number

Status

Draft

Original Invoice

MD0005

Number

Original Invoice Date

18/01/2021

Image Scan

Browse...

Supplier Note

Attachments



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

Cash Accounting

Scheme

\* Credit Reason

Discount

\* Supplier

\* Supplier VAT ID

\* Invoice-From Address

Sadia Limited Estates

123 Test Road

London

NW10 0PJ

United Kingdom

\* Remit-To Address

London

NW10 0PJ

United Kingdom

\* Ship-From Address

Sadia Limited Estates

Customer

FirstPort

\* Bill-To Address

Marlborough House

Weymouth Place

## Step Six

### Enter the Credit Note number & Credit Reason

Enter your credit note number here

Insert the reason for the credit note here

## Step Seven

Check amount of credit is correct

Add Tag

Scroll down to check  
the credit note  
amount

### Total Taxes

Lines Net Total	-160.00
Lines VAT Totals	0.00
Total VAT	0.00
Net Total	-160.00
<b>Gross Total</b>	<b>-160.00</b>

Click the “Submit”  
button

Delete

Cancel

Save as draft

Calculate

Submit

0

Enter Comment

Chat with Coupa Support



## Step Eight

### Send Credit Note

PM-WO-DRTKUNAV -80.00 -80.00

PO Line	Contract	Supplier part number	Labour Amount
1012623-1			

**CIS Commodity**  
No

**Billing**  
35738A-S1 35738A-1810-1384

**Taxes**

VAT Rate	VAT Amount	Tax Reference
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Are you ready to send?

Coupa is about to create a credit note on your behalf. Please make sure you are not attaching another credit note to this transaction as the Coupa generated PDF is your and your customer's legal credit note.

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

Click here to send the credit note

# Step Eight (a)

Create a replacement Invoice if needed

Lines

Line	Description	Supplier part number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line
1	PM-WO-DRYRUNXW732 E2E - Service Description first hour reactive Plumbing					None	-80.00	-80.00	1012623-1

Labour Amount None  
CIS Commodity No

Create Replacement Invoice

Do you want to create a new invoice to replace the one you just canceled?

NoYes

Taxes	VAT Description	VAT Rate	VAT Amount	Tax Reference
	VAT	0.0%	0.0	

Select 'Yes' to create a replacement invoice if needed

If no replacement needed select 'No' to continue this process

Step Nine

Check your Credit Note has been sent for approval

Select Customer

FirstPort

Invoices

Create Invoices *i*



Your credit note will be shown in the list of invoices pending approval

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to		View		Search			
All							
Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
CN0005	24/02/2021	Pending Approval	1012623	-160.00 GBP	No		
CN 2000	23/02/2021	Pending Approval	1012601	-20.00 GBP	No		
None	23/02/2021	Draft	1012600	160.00 GBP	No		 
CN 1000	23/02/2021	Pending Approval	1012622	-160.00 GBP	No		