

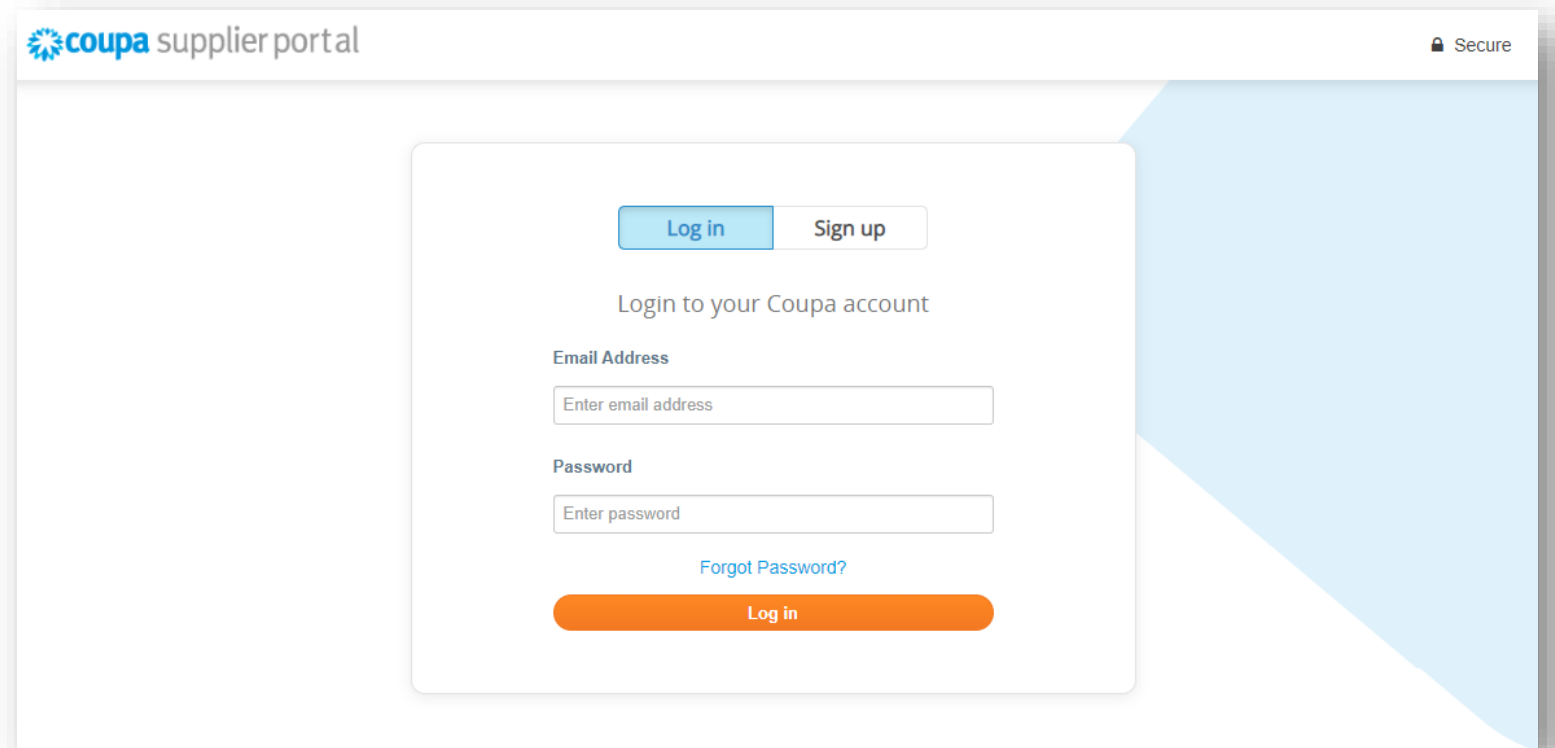


Coupa Supplier Portal: Creating a Credit Note

9/23/2021

Creating a Credit Note

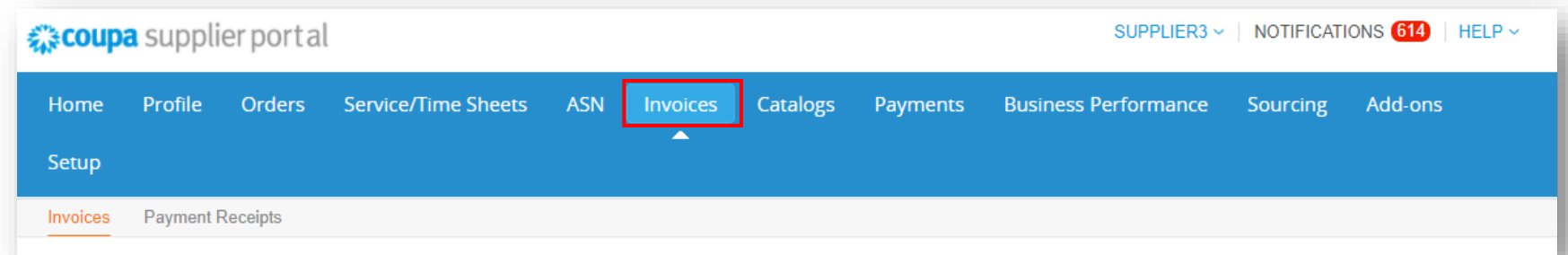
- Log into the CSP at: <https://supplier.coupahost.com/session/new> using the credentials that you created on your first login.



The screenshot shows the Coupa Supplier Portal login interface. At the top left is the Coupa logo and the text "coupa supplier portal". At the top right is a "Secure" indicator with a lock icon. The main content area features a white login box with a light blue background. Inside the box, there are two buttons: "Log in" (blue) and "Sign up" (white). Below these buttons is the text "Login to your Coupa account". There are two input fields: "Email Address" with the placeholder "Enter email address" and "Password" with the placeholder "Enter password". Below the password field is a blue link for "Forgot Password?". At the bottom of the login box is a large orange "Log in" button.

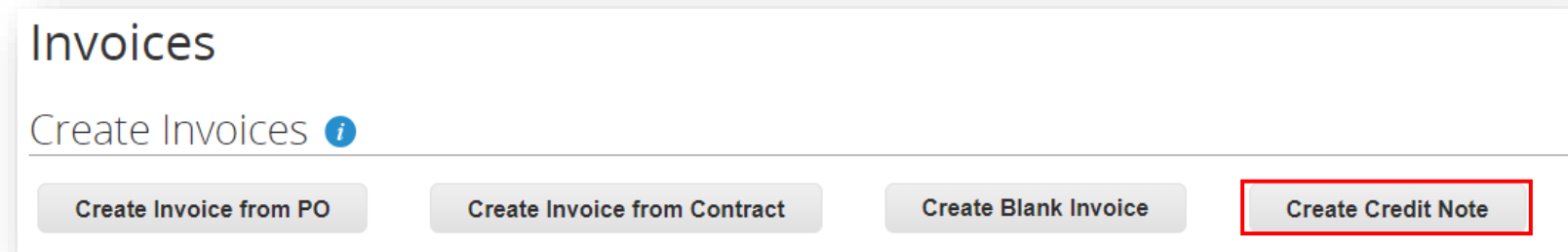
Creating a Credit Note

- Click on the *Invoices* tab from the menu bar.



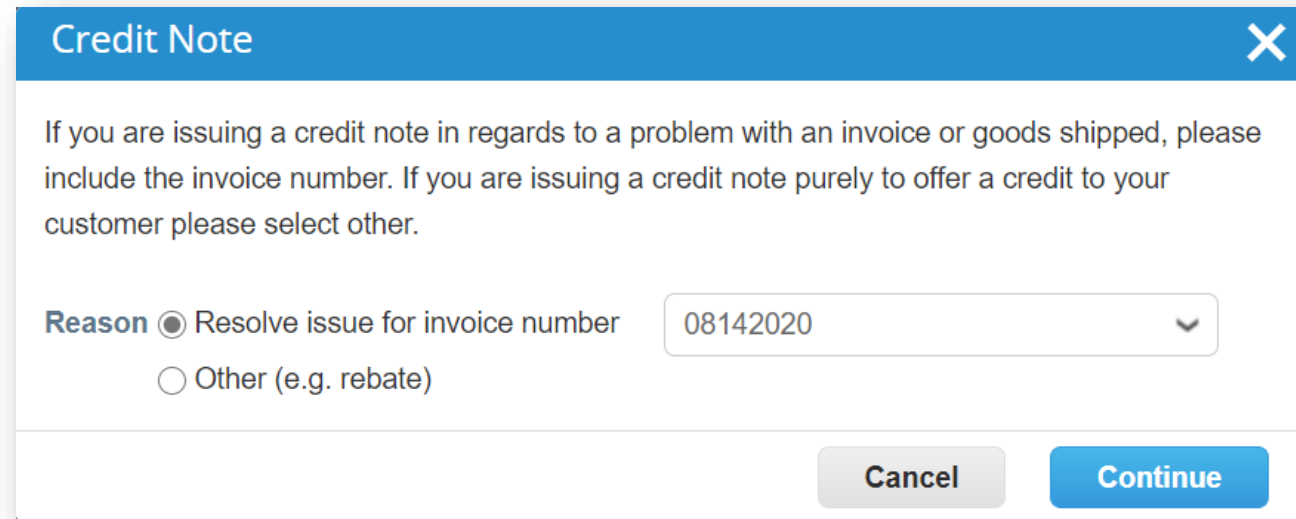
Creating a Credit Note

- On the Invoices screen, click [Create Credit Note](#).



Creating a Credit Note

- In the Credit Note pop up, choose *Resolve issue for invoice number*.
Note: ALWAYS use [Resolve issue for invoice number](#) as UPS does not use Coupa for Rebates.
- Enter or select an invoice number that has been submitted to UPS from the dropdown menu.
- Click *Continue*.



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)

08142020

Cancel **Continue**

Creating a Credit Note

- Next, select *Adjust invoice with a credit note*.
- Click *Create*.

Credit Note

How do you want to correct invoice "08142020" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Creating a Credit Note

- In the *General Info* section, enter a unique number in the *Credit Note #* field. (50-character limit).

Create Credit Note Create

This credit note applies to invoice [08142020](#). When approved, the credit will a

General Info

*** Credit Note #**

Credit Note Date Set automatically at time of submission

Payment Term EOAP + NET 90

*** Currency**

Delivery Number

Status Draft

Original Invoice # 08142020

Original Invoice Date 08/14/20

Image Scan No file chosen



Supplier Note

Creating a Credit Note

- In the *Lines* section, select the Adjustment Type (Quantity, Price, or Other), if necessary.
- Change the quantity or price to reflect the amount to be credited back to UPS.


☰ Lines Line Level Taxation

Adjustment Type Quantity ▼

Type	Description	Qty	UOM	Price	
	Laptop Sleeve	-20.0	Each ▼	40.00	-800.00 

PO Line Contract Supplier Part Number
COU1026-1 ▼

Billing
XP0073-G009-698408-0000-0000-000000-000000

 Add Tag

Creating a Credit Note

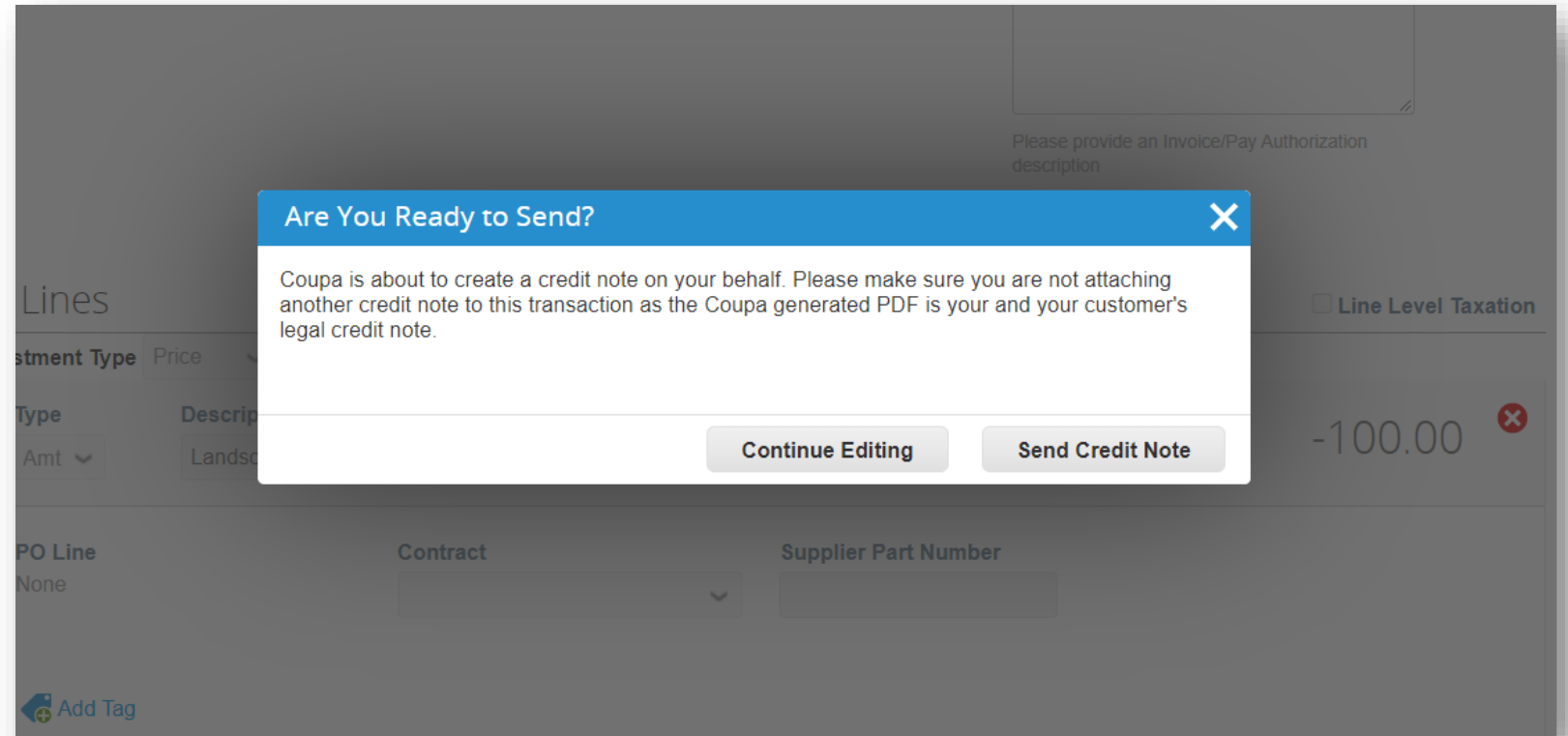
- Scroll down to the *Totals & Taxes* section and click *Calculate* to update the total.
- Click *Submit*.

Totals & Taxes

Lines Net Total	-100.00
Shipping	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Total Tax	0.00
Net Total	-100.00
Total	-100.00

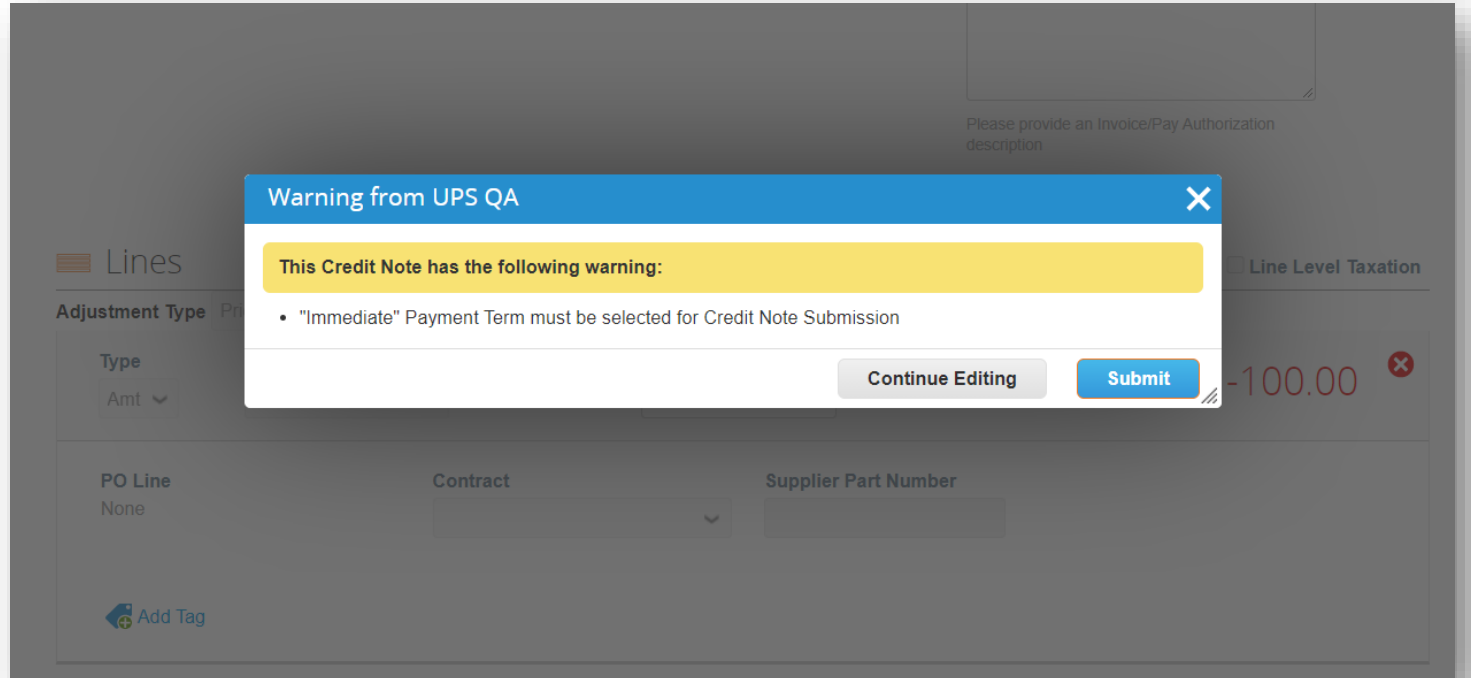
Creating a Credit Note

- On the *Are You Ready to Send* pop up, click *Send Credit Note*.



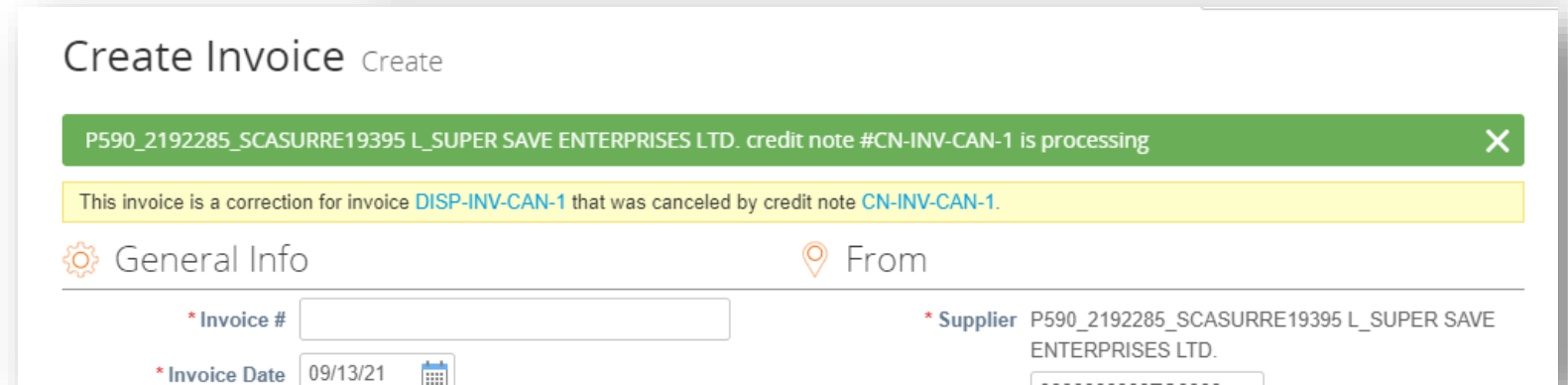
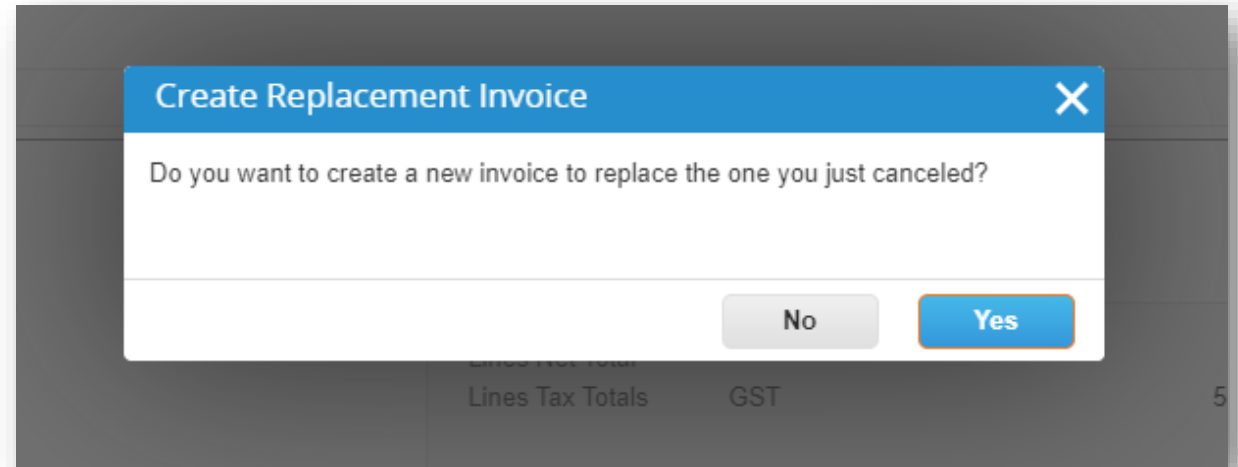
Creating a Credit Note

- In the *Warning from UPS* pop up, click *Submit*.



Creating a Credit Note

- A *Create Replacement Invoice* pop up, click *No* to send the credit note.
- Click *Yes* to send the credit note and be redirected to the Create Invoice screen.



Creating a Credit Note

- After clicking No in the Create Replacement Invoice pop up, back on the *Invoices* page, a green bar will appear towards the top of the screen.
- The newly created credit note will be listed with a status of *Processing*.
- Users will be notified of credit note status updates via online, email, and/or SMS (text) messaging, depending on how notifications were set up.
- Got questions? Need help? Email supplyline@ups.com.

Invoices

P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS credit note #CN-1 is processing

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
CN-1	10/14/20	Processing	None	-100.00 USD	No		



THANK YOU