

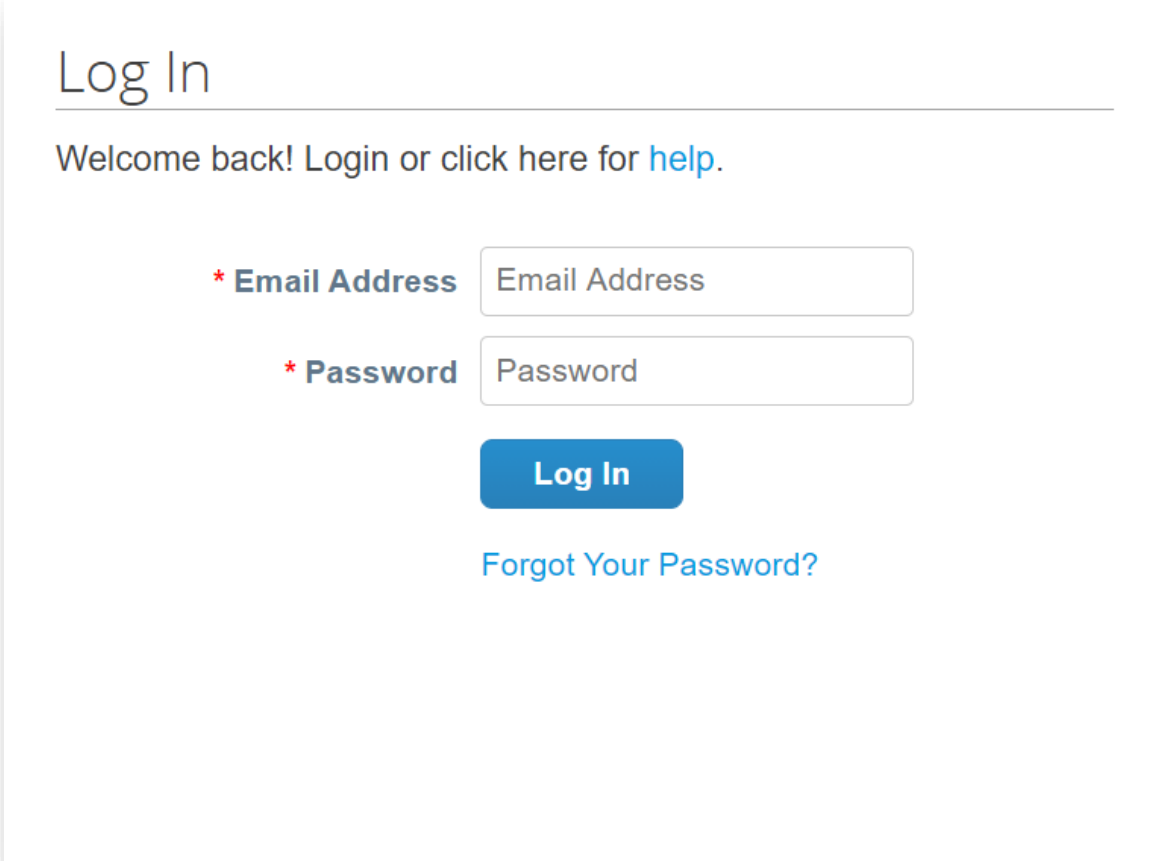


Coupa Supplier Portal: Creating a Credit Note

11/3/2020

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.

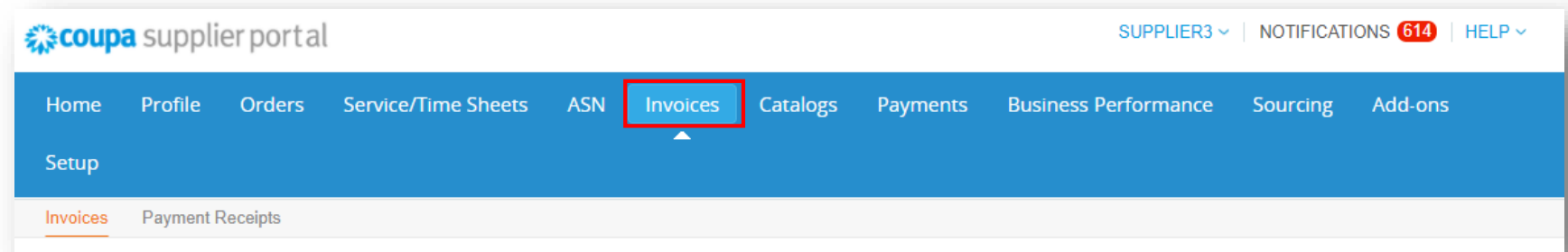


The screenshot shows a login interface with the following elements:

- Log In**: The title of the form, underlined.
- Welcome back! Login or click here for [help](#).**: A message below the title.
- * Email Address**: A label for the first input field.
- Email Address**: The text inside the first input field.
- * Password**: A label for the second input field.
- Password**: The text inside the second input field.
- Log In**: A blue button with white text.
- [Forgot Your Password?](#)**: A blue link below the button.

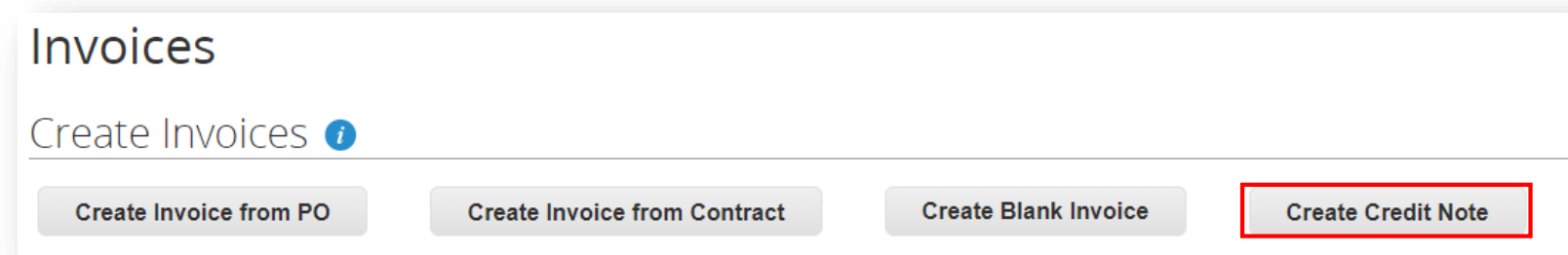
Creating a Credit Note

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



Creating a Credit Note

- On the Invoices screen, click *Create Credit Note*.



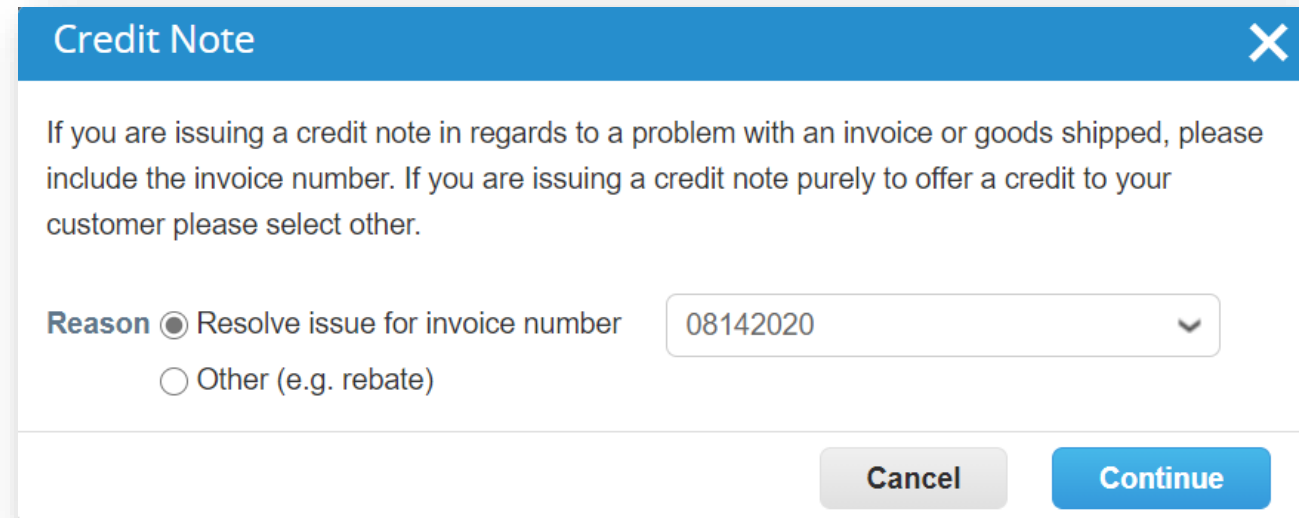
Creating a Credit Note

- 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 X

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 08142020
 Other (e.g. rebate)

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** USD

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 COU1026-1 Contract ▾ Supplier Part Number ▭

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

 Add Tag

Creating a Credit Note

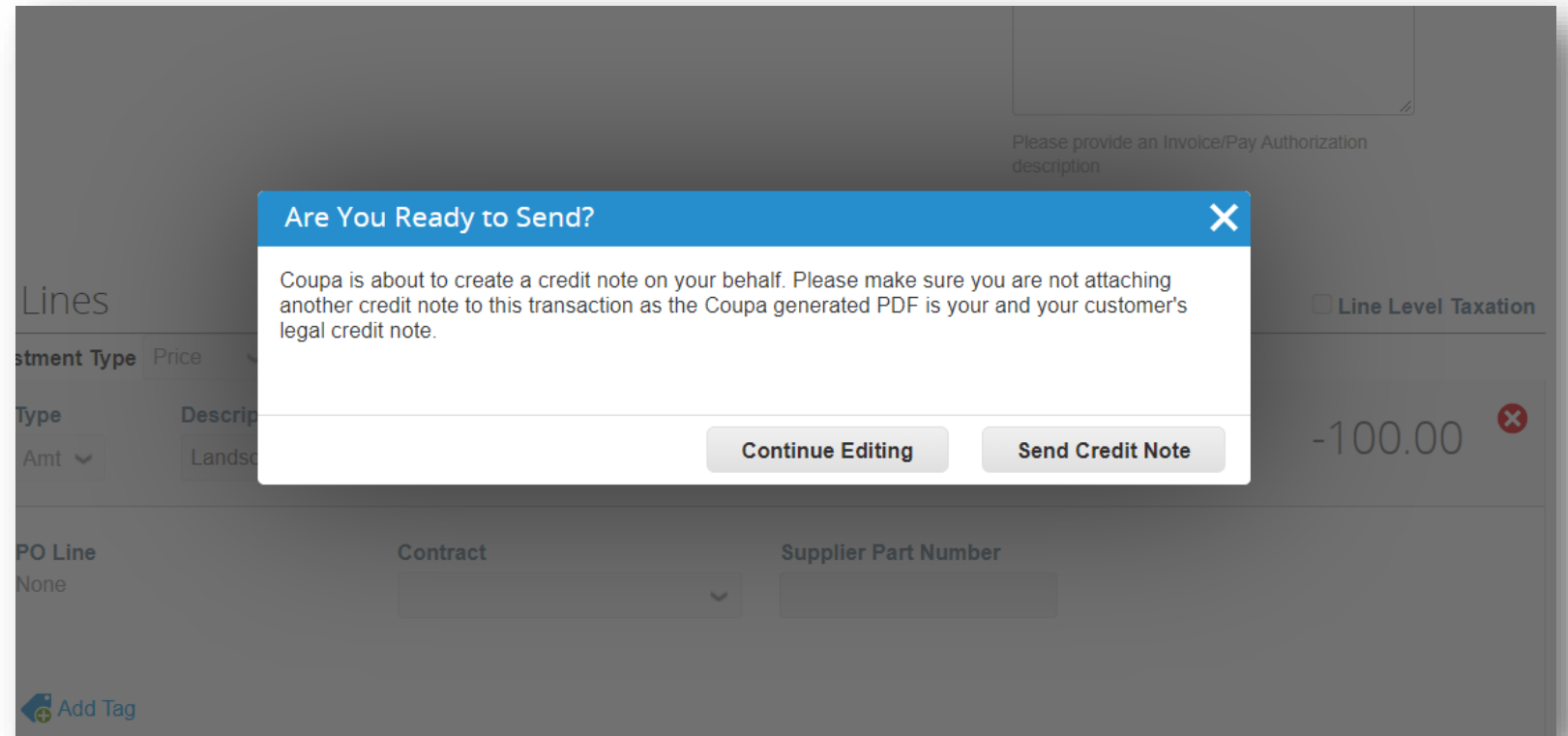
- Scroll down to the *Totals & Taxes* section and click *Calculate* to update the total.
- Click *Submit*.

Totals & Taxes

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

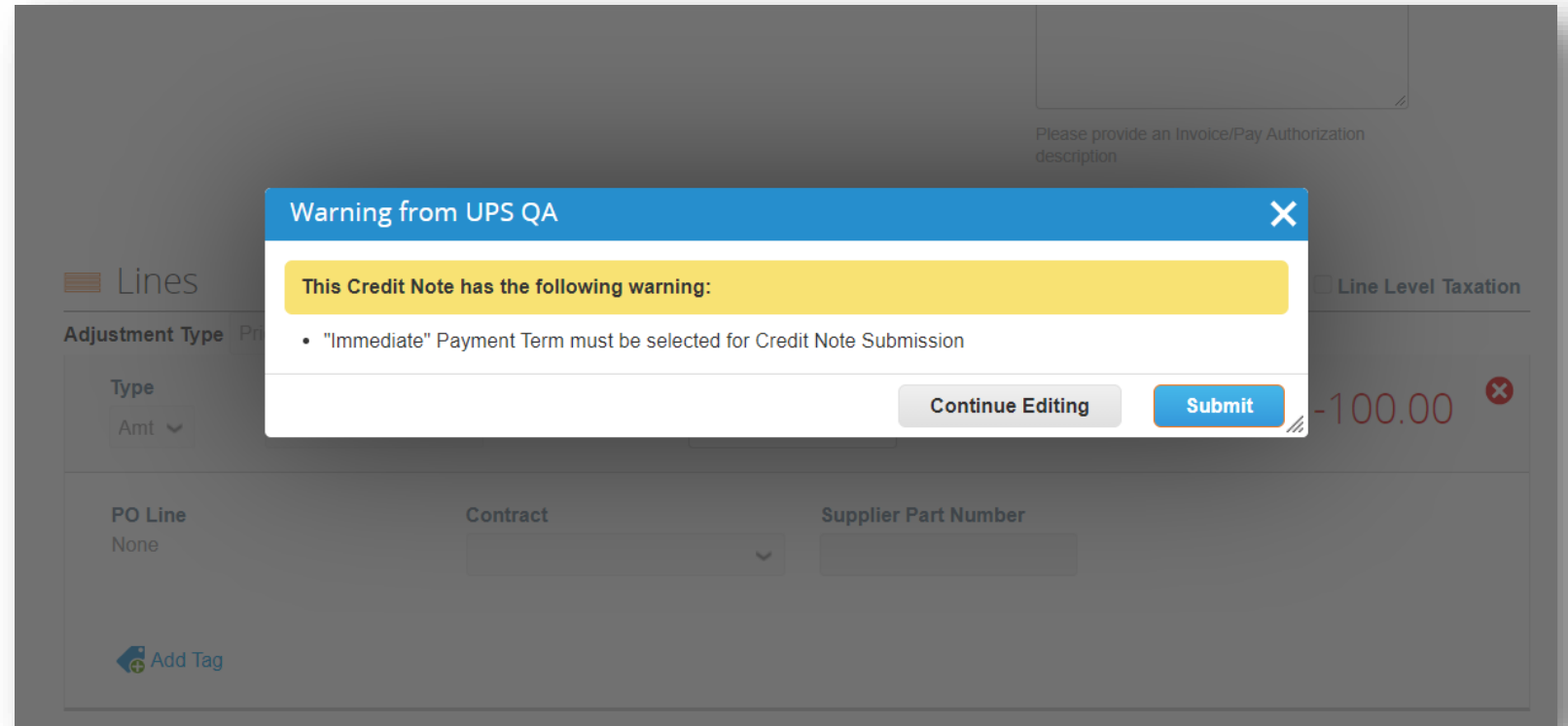
Creating a Credit Note

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



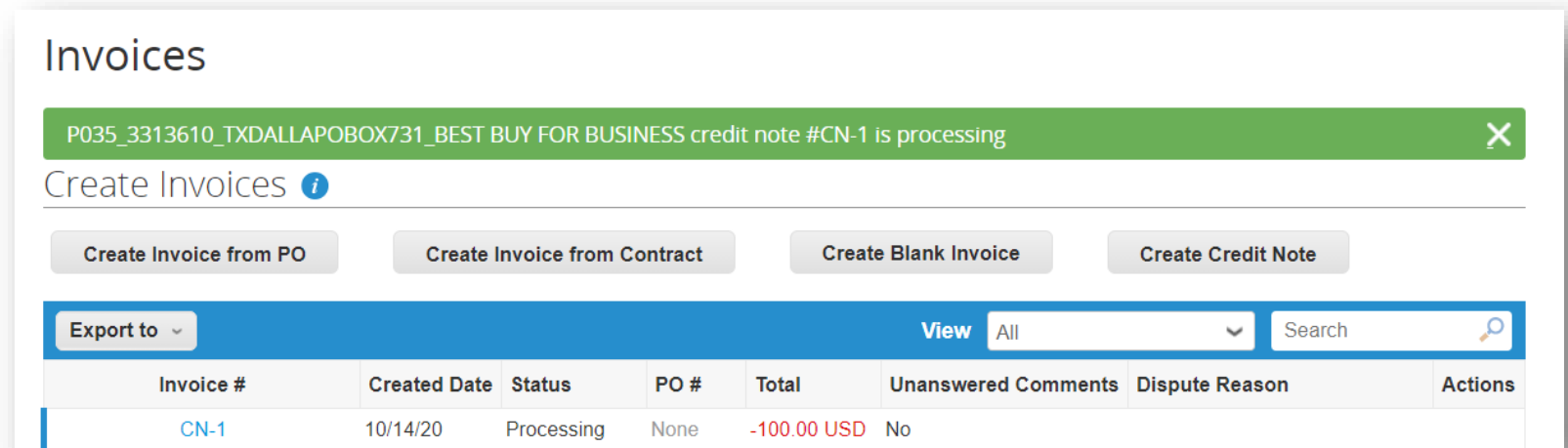
Creating a Credit Note

- A *Warning from UPS* pop up may appear, click *Submit*.



Creating a Credit Note

- 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.



The screenshot shows the 'Invoices' page interface. At the top, there is a green notification bar with the text: 'P035_3313610_TXDALLAPOBOX731_BEST BUY FOR BUSINESS credit note #CN-1 is processing'. Below this, there is a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A blue bar contains an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search field. Below this is a table with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CN-1	10/14/20	Processing	None	-100.00 USD	No		



THANK YOU