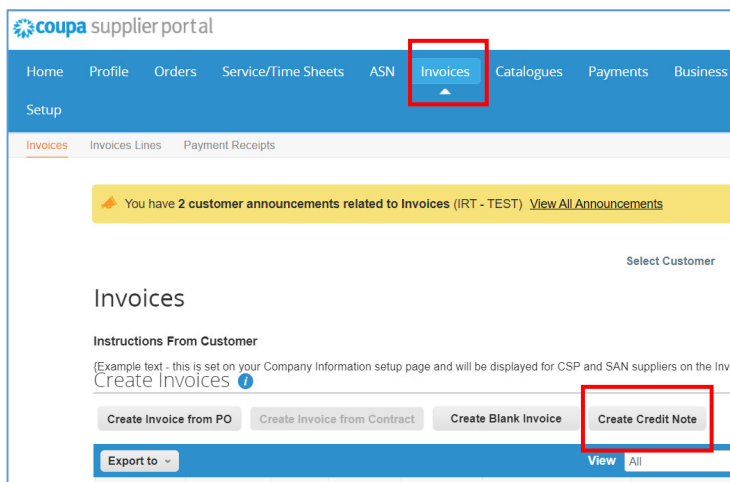




## HOW TO RAISE A CREDIT NOTE IN THE COUPA SUPPLIER PORTAL (CSP)

(Increase the zoom to view the screenshots clearly.)

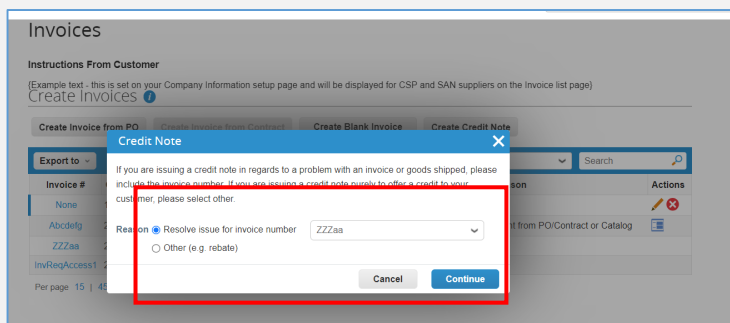
You would only use this process guide if the invoice you want to credit is **not** in a status of dispute. If the invoice is in a status of dispute, please follow the [How to resolve a disputed invoice entered by Coupa Supplier Portal](#)



### Step 1

Go to the Invoices tab in your Coupa supplier portal account.

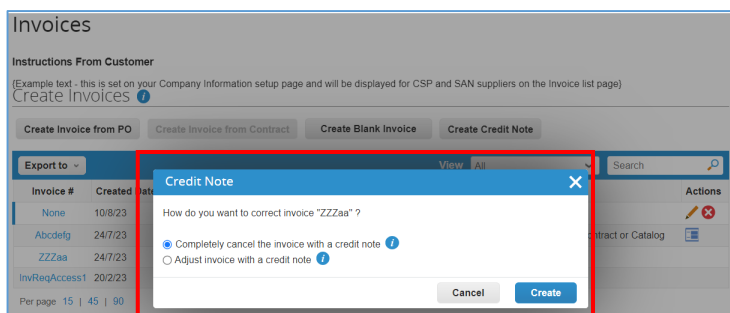
Select the “Create Credit Note” button.



### Step 2

Select an option from the “Reason” in the pop up box and select the invoice # you want to credit.

Select continue.



### Step 3

In the next pop up screen, select the appropriate option for the invoice you want to cancel. The information icons provide you with an explanation of each available option.



# COUPA SUPPLIERS

## QUICK REFERENCE GUIDE

Create Credit Note Create

This credit note applies to invoice 1234abcd. When approved, the credit will fully cancel the invoice's impact to the transaction.

**General Info** From

\* Credit Note #

\* Credit Note Date 25/8/23

Payment Term 14D

Original Date of Supply 25/8/23

\* Currency AUD

Delivery Number

Status Draft

\* Supplier IRT Lawn Mowing Pty Ltd

\* Supplier ABN 12345678911

\* Invoice-From Address IRT Lawn Mowing Pty Ltd  
PO Box 77  
Wollongong, NSW 2500  
Australia

\* Remit-To Address IRT Lawn Mowing Pty Ltd  
PO Box 77  
Wollongong, NSW 2500  
Australia

### Step 4

Complete the required details of the credit note as you would an invoice and submit.

Then "send credit note"

GST Rate GST Amount Tax Reference

Create Replacement Invoice X

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

No Yes

Total Taxes

### Step 5

You can choose to create a new invoice at this step if required.

Invoices

IRT Lawn Mowing Pty Ltd credit note #1234abcd CN approved X

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 Invoice list page]

Create Invoices i

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 C	Comments	Dispute reason	Actions
1234abcd CN	25/8/23	Approved	None	-550.00 AUD	No			
1234abcd	25/8/23	Pending Approval	None	440.00 AUD	No			
1234abcd	25/8/23	Approved	None	550.00 AUD	No			
None	25/8/23	Draft	None	0.00	No			

### Step 6

You can see the credit note and invoice in your invoices section.