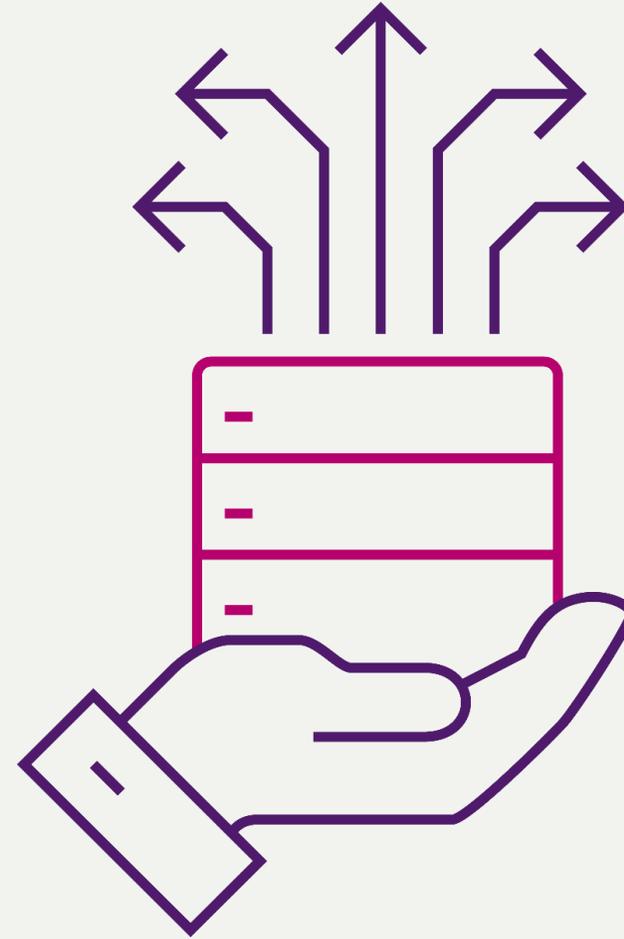# Supplier Instructions on How to create & submit a Credit Note

How to Create and Submit a Credit Note

How to Create and Submit a Credit Note

Below is a link to the Coupa Supplier Portal (CSP) where you can log into Coupa or Register. Please be aware that the email address for registering your CSP account must be the same as the one that the CSP invite was sent to

Log into Coupa using URL
https://supplier.coupahost.com/sessions/new

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How to Create and Submit a Credit Note

The below instructions provide the preferred method that a Supplier should use to create a Coupa credit note.
Note: Do not use the **red coins** icon to create a credit note as this leads to errors.

Click 'Invoices'

The 'Invoices' screen is displayed

How to Create and Submit a Credit Note

Click 'Create Credit Note'

Ensure that the radio button against 'Resolve issue for invoice number' and select the invoice numbers that you are crediting, and click 'Continue'
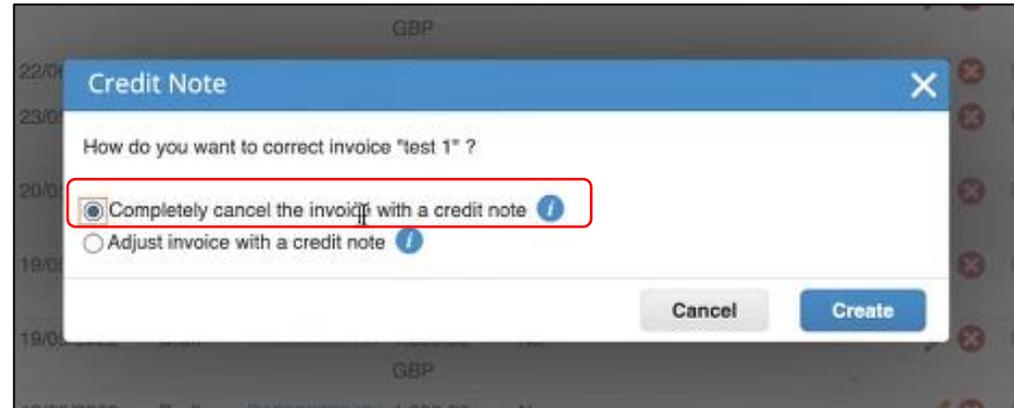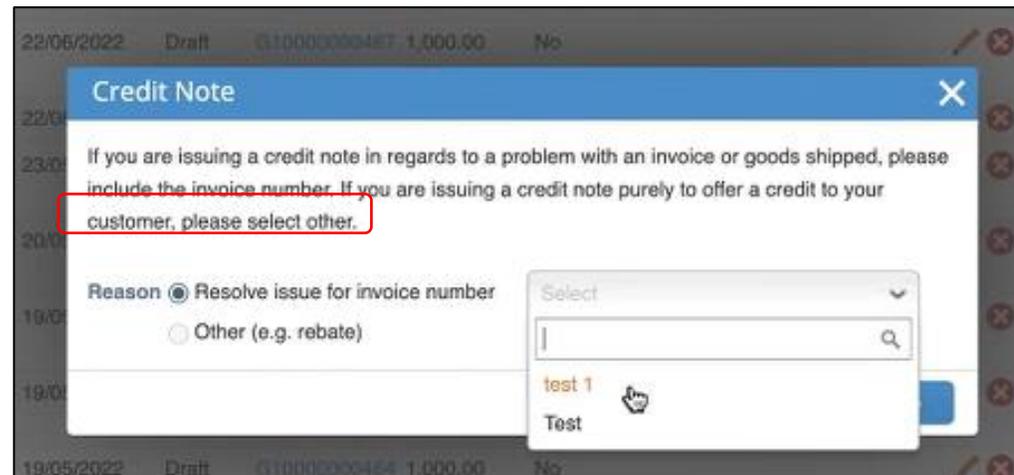
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How to Create and Submit a Credit Note

Click 'Completely cancel the invoice with a credit note'

➡️

Select the invoice number that you are crediting, and click 'Continue'

➡️

How to Create and Submit a Credit Note

The 'Create Credit Note' screen is displayed

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How to Create and Submit a Credit Note

Make the below updates:

- credit note number

- credit note date

➡

Create Credit Note Create

This credit note applies to invoice test 1. When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* Credit Note #	Test1CR
* Credit Note Date	27/06/2022
Payment Term	V060 - 60 Days (From Invoice Date)
Original Date of Supply	01/03/2022
* Currency	GBP
Delivery Number	
Status	Draft
Original Invoice Number	test 1

From

* Supplier	Test Supplier SH
* Supplier VAT ID	GB416706654
* Invoice-From Address	Test Supplier SH London Bridge House London SE1 9SG United Kingdom Consultancy
* Remit-To Address	Test Supplier SH London Bridge House London SE1 9SG

Select Customer Mitie Group Plc - Test Supplier SH

How to Create and Submit a Credit Note

Make the below updates:

- Input the credit reason

- Make sure that the buyer vat id is prefixed by the regional initials (i.e. **GB**)

How to Create and Submit a Credit Note

The credit note line details are shown

The credit note has brought through lines from the invoice, and created a credit note

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How to Create and Submit a Credit Note

Check that the below is correct:

- Total VAT

- Net Total

- Gross Total

If all is correct, click 'Submit'

How to Create and Submit a Credit Note

If you are happy to continue, click 'Send Credit Note'
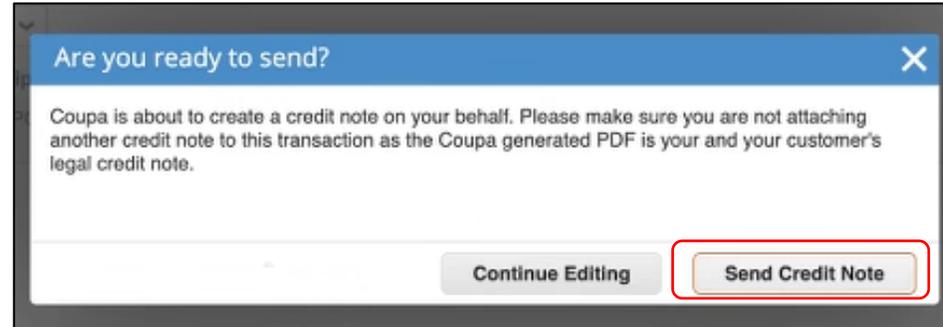
You are then asked if you wish to create a replacement invoice. If you click Yes you will be taken to the invoice creation screen

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

Create Replacement Invoice

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

No | Yes

How to Create and Submit a Credit Note

If you click 'No' you are taken back to the 'Invoices' screen

You will see that the credit note that you have just created appears at the top of the list