



How to resolve disputed invoices in your CSP

Feb 2024

How to resolve disputed invoices

When the status of an invoice changes to "Disputed", notification will be sent via email and also via the Coupa Supplier Portal (based on your notification preferences).

Disputed Invoices are mainly where there is not enough funds on the PO for your invoice/s, Coupa will automatically dispute your invoice if there is not enough value/ QTY left on the PO for your invoice. (The full table of Disputed reason are on the next slide)

This could be for some of the reasons listed below,

- You are charging more than the PO.
- You have submitted multiple invoices already but your disputed invoice take it over the PO

You as a supplier will need to work out why your invoice is disputed, check the PO value and what invoices you have submitted against the PO already.

In all cases you as a supplier will have to click the resolve button in the invoices section to Credit the disputed invoice.

Please Note:

- **Mitie does not process disputed invoices for payment until you resolve the dispute.**
- **If an invoice has been submitted in error and has been put in disputed status, you have the ability to create a cancellation document (Credit Note) against this invoice.**

How to resolve disputed invoices



Below is a table of the Dispute Reasons set up for Mitie.

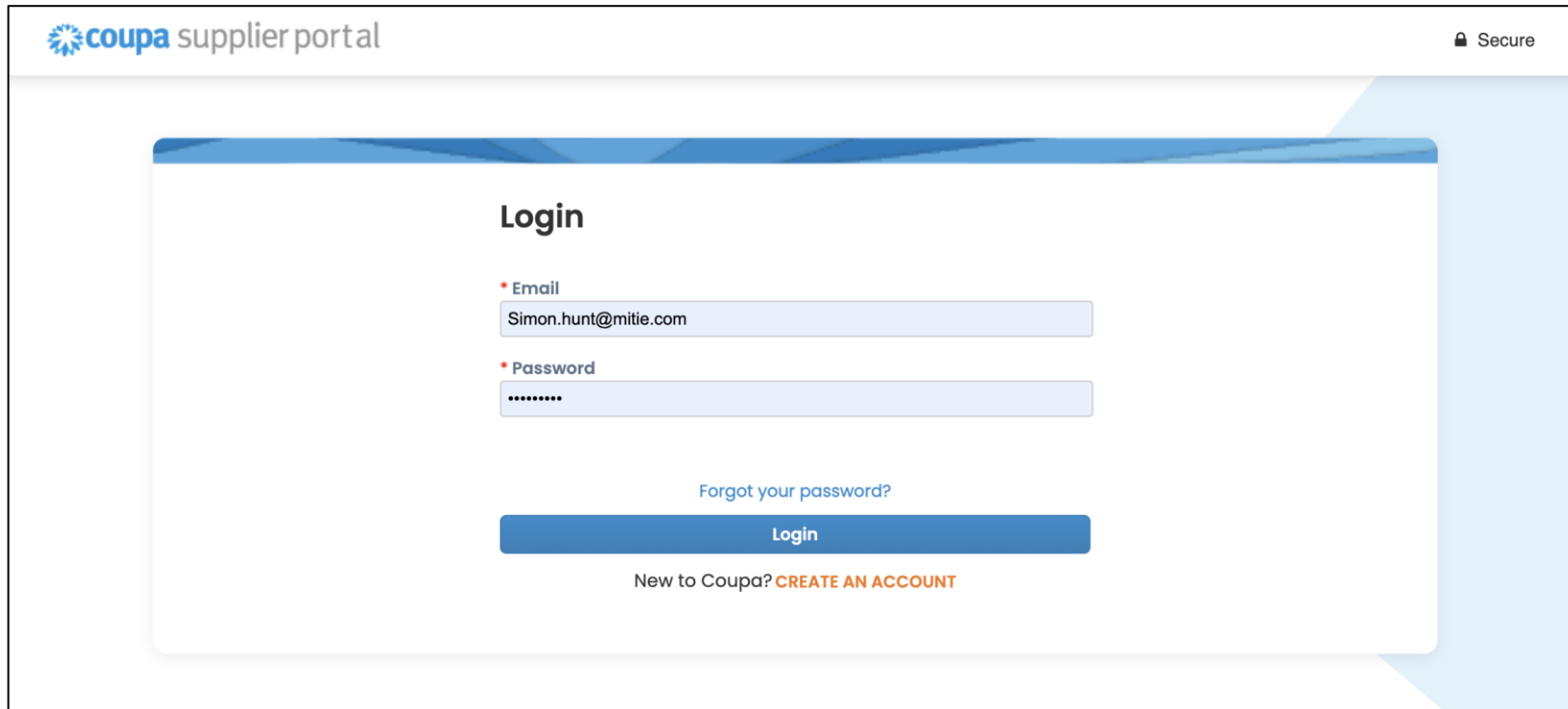
Description
Duplicate Invoice. Already paid or payment review in progress.
Some of the information entered on the invoice is incorrect and cannot be processed by Mitie.
Billing code incorrect
Invoice currency differs from PO currency
Invoice date inaccurate
Invalid or missing PO reference
Price different from PO/Contract or Catalog
Quantity different from PO/Contract or Catalog
Tax rate missing or incorrect
One or more of the invoice lines UOM differs from corresponding PO line's UOM
Mitie cannot accept invoices with an invoice number longer than 16 characters.
A CIS Supplier has not entered a tax reference for reverse charge invoices.
Attachment missing or in incorrect format
The CIS Supplier has not selected whether the invoice is inside or outside of Scope.
The Supplier has not completed the labour costs on an invoice. They need to add "0" if not applicable.
Goods/Service over received
Goods/Service pending delivery
The Remit to address on your invoice does not match our vendor master. Either correct your legal entity in your CSP or Please email supplier Supplier.Maintenance@mitie.com and request a Remit to update form. This will be sent via Coupa. Remit to address needs to match before Mitie can pay your invoice.
Faulty or Wrongly Shipped Product or Excess shipment returned
Please can you correct your supplier VAT number in your legal entity in your CSP or Remit to address using SAN . Supplier VAT number should start GB in Coupa with no spaces.
Invoice line unit price mismatch compared to PO line unit price.
Invoice amount greater than PO.
Invoice quantity greater than PO quantity.

How to resolve disputed invoices

This how to guide goes through a step by step process on how to resolve disputed invoices in your CSP

You will require your **CSP** account.

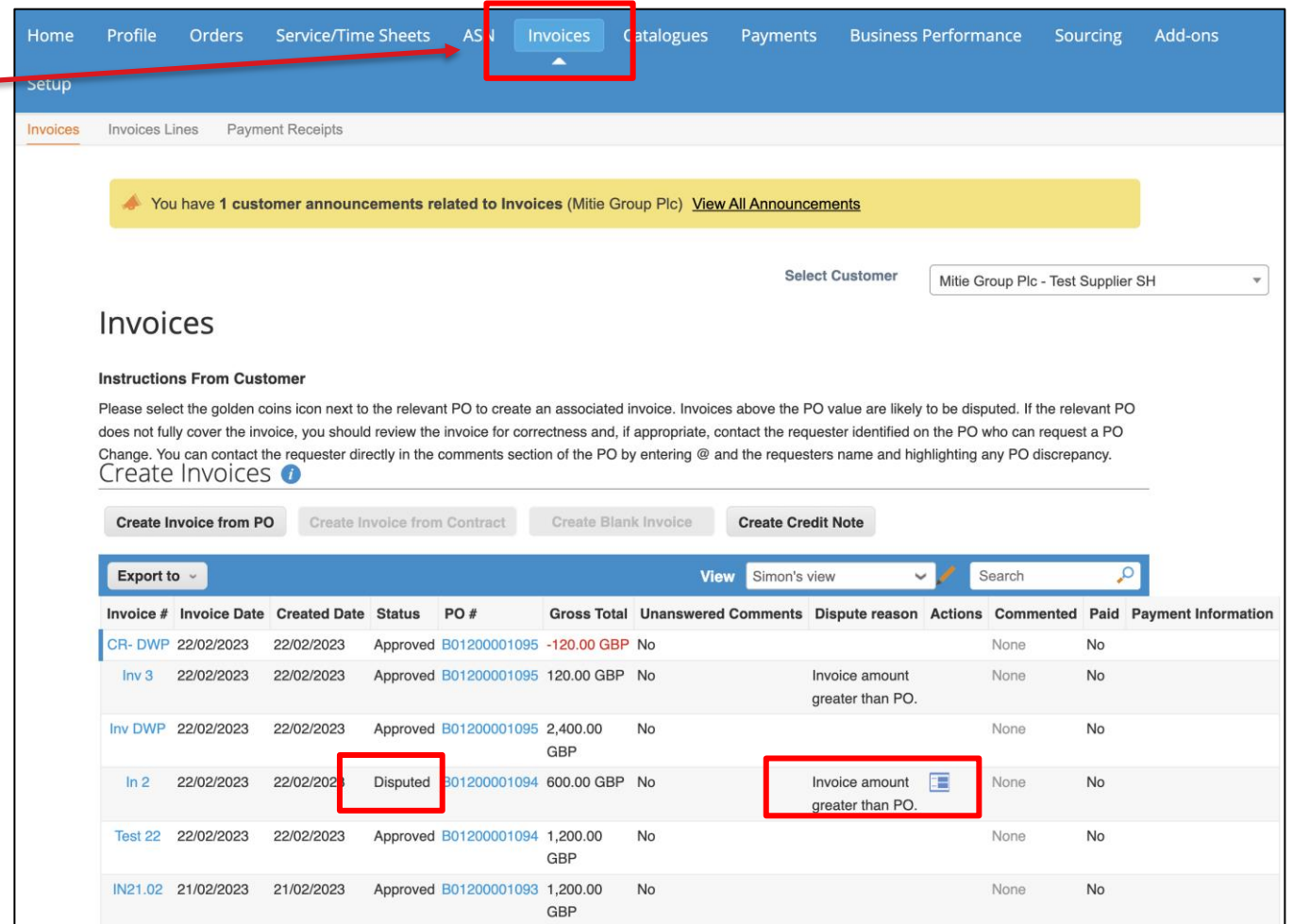
Log into your **CSP** account.



The screenshot shows the Coupa supplier portal login page. The page header includes the Coupa logo and "supplier portal" text on the left, and a "Secure" indicator with a lock icon on the right. The main content area is titled "Login" and contains two input fields: "Email" with the value "Simon.hunt@mitie.com" and "Password" with masked characters. Below the password field is a link for "Forgot your password?". A blue "Login" button is positioned below the links. At the bottom of the form, there is a link for "New to Coupa? CREATE AN ACCOUNT".

How to resolve disputed invoices

In the big blue bar at the top of your screen click on Invoices



The screenshot shows the Mitie Invoices page. At the top, a blue navigation bar contains 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'AS', 'Invoices', 'Catalogues', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Invoices' menu item is highlighted with a red box and a red arrow pointing to it from the text on the left. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. A yellow notification bar states: 'You have 1 customer announcements related to Invoices (Mitie Group Plc) [View All Announcements](#)'. Below this is a 'Select Customer' dropdown menu set to 'Mitie Group Plc - Test Supplier SH'. The main heading is 'Invoices'. Underneath, there is a section 'Instructions From Customer' with a paragraph of text and a 'Create Invoices' link. Below the instructions are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table is displayed with columns: Invoice #, Invoice Date, Created Date, Status, PO #, Gross Total, Unanswered Comments, Dispute reason, Actions, Commented, Paid, and Payment Information. The table contains several rows, with the row for 'In 2' having a 'Disputed' status highlighted with a red box. The 'Dispute reason' for this row is 'Invoice amount greater than PO.', which is also highlighted with a red box. Other rows include 'CR- DWP', 'Inv 3', 'Inv DWP', 'Test 22', and 'IN21.02'.

Invoice #	Invoice Date	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions	Commented	Paid	Payment Information
CR- DWP	22/02/2023	22/02/2023	Approved	B01200001095	-120.00 GBP	No			None	No	
Inv 3	22/02/2023	22/02/2023	Approved	B01200001095	120.00 GBP	No	Invoice amount greater than PO.		None	No	
Inv DWP	22/02/2023	22/02/2023	Approved	B01200001095	2,400.00 GBP	No			None	No	
In 2	22/02/2023	22/02/2023	Disputed	B01200001094	600.00 GBP	No	Invoice amount greater than PO.		None	No	
Test 22	22/02/2023	22/02/2023	Approved	B01200001094	1,200.00 GBP	No			None	No	
IN21.02	21/02/2023	21/02/2023	Approved	B01200001093	1,200.00 GBP	No			None	No	

You will have received a notification your invoice is disputed

It will show in the invoices section with a status of Disputed

Each Disputed invoice will have a Disputed reason, as a supplier you will need to investigate the reason and in most cases the value of your invoice is greater than your PO. This could be that you have sent multiple invoices to exceed the PO amount.

In any scenario all disputed invoices have to be credited and re-invoiced if required

How to resolve disputed invoices



This will open the Invoice with the options section with 2 options **Cancel Invoice** or **Adjust**.

Cancel Invoice (recommend option)

If the invoice was issued duplicate, or if you require to amend non price or quantity information on the invoice, please cancel the invoice by choosing this option.

Adjust (not recommended Option)

If the price and/or the quantity for invoice line(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it. You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.

If you scroll to the bottom of the invoice you will see the options as buttons to select (see next slide)

The screenshot shows the Mitie Invoices system interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Payments, Business Performance, Sourcing, and Add-ons. Below this is a sub-navigation bar with Invoices, Invoices Lines, and Payment Receipts. A yellow banner at the top of the main content area states: "You have 1 customer announcements related to Invoices (Mitie Group Plc) View All Announcements". Below this is a "Select Customer" dropdown menu set to "Mitie Group Plc - Test Supplier SH". The main heading is "Invoice #In 2 Back". A red box highlights a section titled "Please review the invoice and determine the resolution option:". This section contains two options: "Cancel Invoice" and "Adjust". The "Cancel Invoice" option states: "If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancellation credit note and a replacement invoice creation." The "Adjust" option states: "If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit." Below this section are two columns of information: "General Info" and "Bill To & Ship To". The "General Info" column includes: Invoice # In 2, Invoice Date 22/02/2023, Payment Term V060 - 60 Days (From Invoice Date), Delivery Date 22/02/2023, Currency GBP, Delivery Number None, Status Disputed, Dispute Reason(s) Invoice amount greater than PO., Shipping Term None, Legal Invoice download, Image Scan None, and Supplier Notes None. The "Bill To & Ship To" column includes: Supplier Test Supplier SH, Invoice From Test Supplier SH, The Shard, London, SE1 9SG, United Kingdom, Type of Company Ltd, Remit To Test Supplier SH, The Shard, London, SE1 9SG, United Kingdom, and Ship From Test Supplier SH, The Shard, London. A "GB" flag icon is visible in the top right of the Bill To & Ship To section.

How to resolve disputed invoices

2 options are shown below the invoice details

Cancel Invoice or Adjust.

Option 1 to Cancel Invoice

Click Cancel Invoice

In Cancel Invoice, you cannot amend the information of the invoice. Only Credit Note # and Credit reason are mandatory

[B012],[F001],[G002],[B002],[G100],[K001],[K005]

Lines

Line	Description	Supplier part number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line	Service/Time Sheets Line
1	Services for DFT					None	500.00	500.00	B0120001094-1	None

CIS related cost? None
CIS Labour Cost None

Taxes

VAT Description	VAT Rate	VAT Amount	Tax Reference
S1	20.0%	100.00	

Total Taxes

Lines Net Total		500.00
Lines VAT Totals	VAT	20.0% 100.00
<hr/>		
Total VAT		100.00
Net Total		500.00
Gross Total		600.00

Cancel Invoice Adjust

How to resolve disputed invoices



Enter your Credit note number (Credit Note #)

Enter credit note date (same as original invoice date)

Enter your credit reason

Select Customer Mitie Group Plc - Test Supplier SH

Create Credit Note Create

This credit note applies to invoice [In 2](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* Credit Note #

* Credit Note Date

Payment Term

Original Date of Supply

* Currency

Delivery Number

Status

Original Invoice Number

Original Invoice Date

Image Scan No file chosen

Supplier Note

Attachments

Cash Accounting Scheme

* Credit Reason

Margin Scheme

From

* Supplier

* Supplier VAT ID

* Invoice-From Address

* Remit-To Address

Bank Name:

Beneficiary Name:

Bank Account Number:

Sort Code:

* Ship-From Address

To

Customer

* Bill-To Address

How to resolve disputed invoices

Click on Calculate



Check the values Total VAT, Net Total and Gross Total match your invoice value

Click Submit



The below pop up will open, click send Credit note

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

Lines

Adjustment Type Price

Type	Description	Price	
	Services for DFT	-500.00	-500.00

PO Line: B01200001094-1 Service/Time Sheets Line: None Contract: Supplier part number:

CIS related cost?: CIS Labour Cost:

Select whether this invoice line is In Scope for Construction Industry Scheme deductions. Enter the value of CIS Labour Costs on this line.

Billing: 140020001-Q-ENV-100010-ENV-100010-0001-10-0001

Taxes

VAT Rate	VAT Amount
20.0% <input type="button" value="v"/>	-100.00

Total Taxes

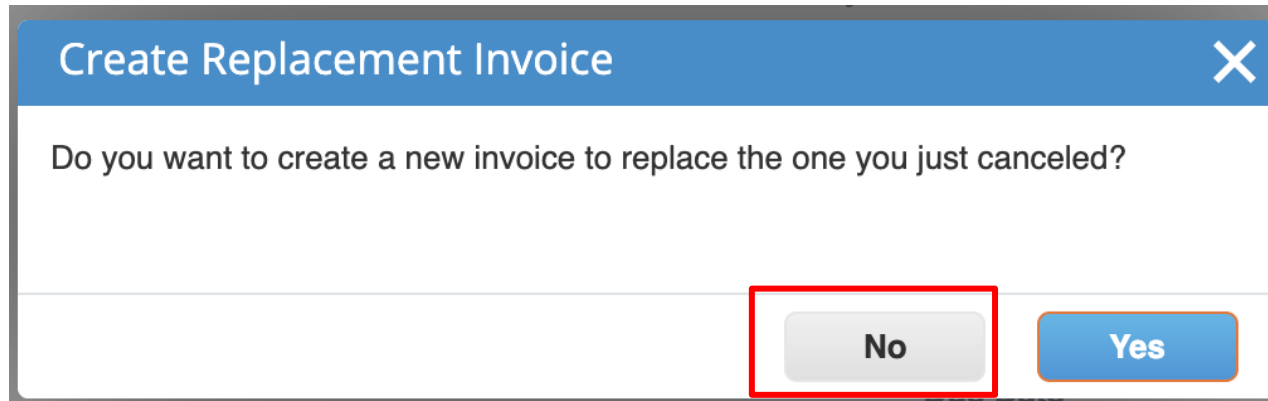
Lines Net Total	-500.00
Lines VAT Totals	-100.00

Total VAT: -100.00
Net Total: -500.00
Gross Total: -600.00

Delete Cancel Save as draft Calculate Submit

How to resolve disputed invoices

You will get a popup asking if you want to create a replacement invoice , say No and go back to Orders tab and click the gold coins against the PO number to create a replacement invoice if required.



If you click yes, it will copy all the disputed invoice details which could be wrong and the reason for being disputed. If you do click YES ensure you are able to amend it before submitting.

Please Note

- **The corrected invoice must have a new Invoice number.**

How to resolve disputed invoices

Option 2 Adjust (not recommended option)

If the price and/or the quantity for invoice line(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it. You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.

To adjust invoice through this option:

1. Go to the Invoices Tab
2. Choose the Invoice with “Disputed” status,
3. then Click the “Resolve” icon under the actions header.

After clicking the “Resolve” icon, you will be directed to the Invoice page, scroll down then click “Adjust” button. Then you will be directed to Credit Note Creation page.

[B012],[F001],[G002],[B002],[G100],[K001],[K005]

Lines

Line	Description	Supplier part number	UOM	Net Weight	Price/Weight	Quantity	Price	Total	PO Line	Service/Time Sheets Line
1	Services for DFT					None	500.00	500.00	B01200001094-1	None

CIS related cost? None
CIS Labour Cost None

Taxes

VAT Description	VAT Rate	VAT Amount	Tax Reference
S1	20.0%	100.00	

Total Taxes

Lines Net Total		500.00
Lines VAT Totals	VAT	20.0% 100.00
<hr/>		
Total VAT		100.00
Net Total		500.00
Gross Total		600.00

Cancel Invoice **Adjust**

How to resolve disputed invoices

Enter your Credit note number (Credit Note #)

Enter your credit reason

Select Customer Mitie Group Plc - Test Supplier SH

Create Credit Note Create

This credit note applies to invoice [In 2](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* Credit Note #

* Credit Note Date

Payment Term

Original Date of Supply

* Currency

Delivery Number

Status

Original Invoice Number

Original Invoice Date

Image Scan No file chosen

Supplier Note

Attachments | |

Cash Accounting Scheme

* Credit Reason

Margin Scheme

From

* Supplier

* Supplier VAT ID

* Invoice-From Address

* Remit-To Address

Bank Name:

Beneficiary Name:

Bank Account Number:

Sort Code:

* Ship-From Address

To

Customer

* Bill-To Address

How to resolve disputed invoices


When you adjust

Please Note

- **In Adjust, you can update the price and/or the quantity for the invoice line(s) depending by choosing which adjustment type is needed. !**
- **If the PO was QTY based you can only update QTY and not price if the PO was Amount based you can update the price.**
- **Be careful because when you click on Adjust, the system will automatically propose to cancel the full quantity/amount. So you will have to modify this quantity/amount according to your need, and keep the “ - ” in front of the figure.**

Make the require adjustments

Lines
Adjustment Type Price

Type	Description	Price	
	Services for DFT	-500.00	-500.00 ✕

PO Line
B01200001094-1

CIS related cost?
Select

Select whether this invoice line is In Scope for Construction Industry Scheme deductions.

Service/Time Sheets Line
None

CIS Labour Cost
Enter the value of CIS Labour Costs on this line.

Contract
▼

Supplier part number

Billing
140020001-Q-ENV-100010-ENV-100010-0001-10-0001

Taxes

VAT Rate	VAT Amount
20.0% ▼	-100.00

Total Taxes

Lines Net Total	-500.00
Lines VAT Totals	-100.00
<hr/>	
Total VAT	-100.00
Net Total	-500.00
Gross Total	-600.00

Delete
Cancel
Save as draft
Calculate
Submit

How to resolve disputed invoices

Click on Calculate



Check the values Total VAT, Net Total and Gross Total match your invoice value

Click Submit



The below pop up will open, click send Credit note

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

Lines
Adjustment Type Price

Type	Description	Price	
Services for DFT		-500.00	-500.00 ✕

PO Line B01200001094-1 **Service/Time Sheets Line** None **Contract** **Supplier part number**

CIS related cost? **CIS Labour Cost**

Select whether this invoice line is In Scope for Construction Industry Scheme deductions. Enter the value of CIS Labour Costs on this line.

Billing
140020001-Q-ENV-100010-ENV-100010-0001-10-0001

Taxes

VAT Rate	VAT Amount
20.0% <input type="text"/>	-100.00

Total Taxes

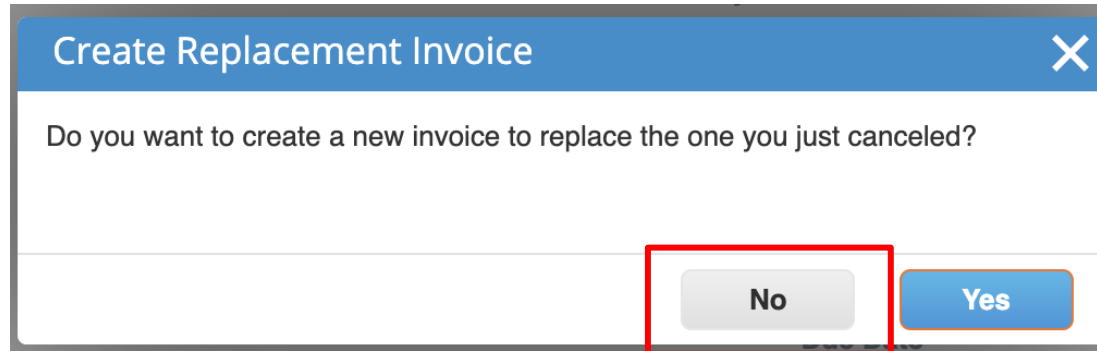
Lines Net Total	-500.00
Lines VAT Totals	-100.00

Total VAT	-100.00
Net Total	-500.00
Gross Total	-600.00

Delete
Cancel
Save as draft
Calculate
Submit

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You will get a popup asking if you want to create a replacement invoice , say **No** and go back to **Orders** tab and click the gold coins against the **PO** number to create a replacement invoice if required.



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Please Note

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END

Remember [Mitiesuppliers.com](https://www.mitiesuppliers.com) has lots of **Coupa Guides** for your reference