



Submitting a Credit Note by the CSP

How to submit a credit note by the Coupa Supplier Portal (CSP)

This guide will help you submit a credit note via the Coupa Supplier Portal (CSP) If your invoice is in Disputed Status, please refer to the how to resolve disputed invoices Guide.

The screenshot shows the Coupa Supplier Portal login interface. At the top left is the 'coupa supplier portal' logo, and at the top right is a 'Secure' indicator with a lock icon. The main content area is a white box with a blue header and footer. The header contains the word 'Login'. Below it are two input fields: the first is labeled '* Email' and the second is labeled '* Password'. Both fields have orange borders. Below the fields is a blue 'Login' button. At the bottom of the box, there are two links: 'New to Coupa? CREATE AN ACCOUNT' and 'Forgot your password?'.

Please do not use the Red Coins on the orders tab, this functionality does not put the value back on the PO to enable you to re-invoice. You must use the Create Credit Note button from the Invoices tab. To Create a credit note you must have a related invoice in your CSP to select and credit against.

If an invoice was submitted incorrectly our recommendation would be to credit the invoice in full and re-process the invoice correctly.

Mandatory fields are marked with a *

1.

CSP Login Screen

You as a supplier to Mitie should have received an CSP invite from Mitie.

Below is a link to the CSP portal where you can log in or Register, please note: the email address for registering your CSP account must be the same as the CSP invite was sent to.

<https://supplier.coupa.com/sessions/new>

 coupa supplier portal

Secure

Login

* Email

* Password

Login

New to Coupa? [CREATE AN ACCOUNT](#)
[Forgot your password?](#)

2.

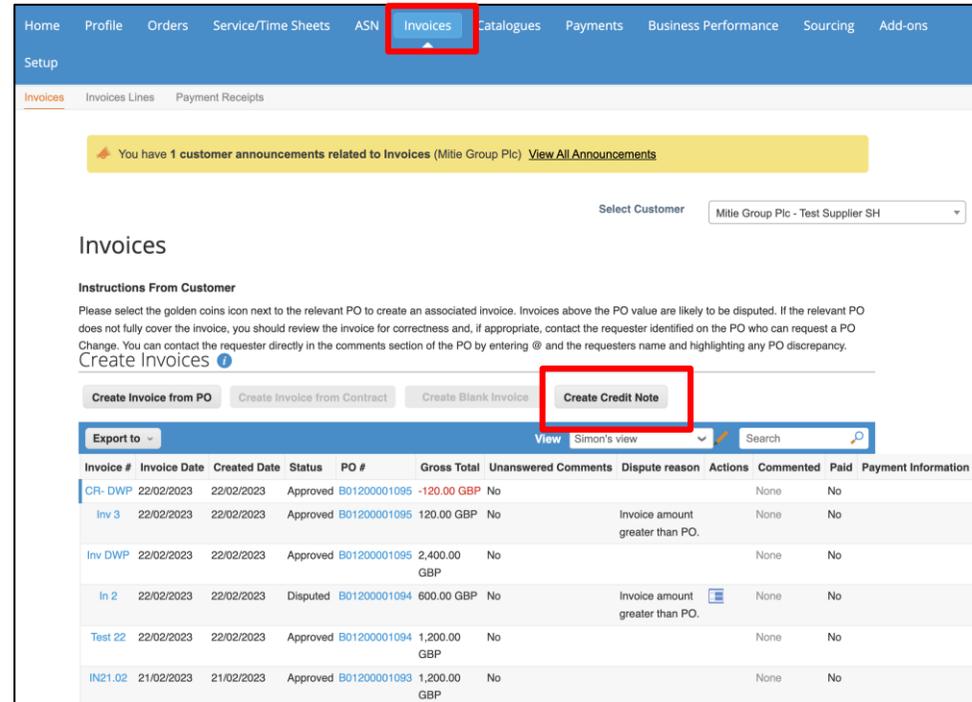
'Invoices'

In your CSP account click on Invoices in the big blue bar

You can only credit against an invoice already created in your CSP.

Click the **Create Credit Note Button**

Make sure you have your related invoice number and details you wish to Credit.



Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Payments Business Performance Sourcing Add-ons

Setup

Invoices Invoices Lines Payment Receipts

You have 1 customer announcements related to Invoices (Mitie Group Plc) [View All Announcements](#)

Select Customer Mitie Group Plc - Test Supplier SH

Invoices

Instructions From Customer

Please select the golden coins icon next to the relevant PO to create an associated invoice. Invoices above the PO value are likely to be disputed. If the relevant PO does not fully cover the invoice, you should review the invoice for correctness and, if appropriate, contact the requester identified on the PO who can request a PO Change. You can contact the requester directly in the comments section of the PO by entering @ and the requesters name and highlighting any PO discrepancy.

Create Invoices 

Create invoice from PO Create Invoice from Contract Create Blank Invoice **Create Credit Note**

Export to - View Simon's view Search

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	

3.

'Credit Note'

A Create Credit Note pop-up opens

The Other option is not available, you can only select resolve issue for invoice number.

Select your related invoice number

Please note: If your invoice is in disputed status it may not show in the drop down and you need to follow the how to resolve disputed invoices guide.

The screenshot displays the 'Invoices' management interface. At the top, there are instructions from the customer and buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below this is a table of invoices with columns for Invoice #, Invoice Date, Created Date, Status, PO #, Gross Total, Unanswered Comments, Dispute reason, Actions, Paid, and Payment Information. A 'Credit Note' dialog box is open, prompting the user to provide a reason for the credit note. The 'Reason' section has two options: 'Resolve issue for invoice number' (selected) and 'Other (e.g. rebate)'. A search dropdown is also visible, listing various invoice numbers and POs.

Invoice #	Invoice Date	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions	Paid	Payment Information
None	28/05/2024	28/05/2024	Draft	G10000360053	780.00 GBP	No			No	
CISTEST050324E	12/03/2024	12/03/2024	Approved	G10000360053	12.00 GBP	No			No	
CISTEST050324D	11/03/2024	11/03/2024	Approved	G10000360053	10.00 GBP	No			No	
CISTEST1103C	11/03/2024	11/03/2024	Approved	G10000360053	100.00 GBP	No			No	
CISTEST1103B	11/03/2024	11/03/2024	Approved	G10000360053	100.00 GBP	No			No	
CISTEST1103A	11/03/2024	11/03/2024	Approved	G10000360053	100.00 GBP	No			No	
None	11/03/2024	11/03/2024	Disputed						No	
CISTEST050324B	05/03/2024	05/03/2024	Approved	G10000360053	100.00 GBP	No			No	
CISTEST050324A	05/03/2024	05/03/2024	Approved	G10000360053	100.00 GBP	No			No	
test10012024C	10/01/2024	08/02/2024	Approved	G10000359789	-1,200.00 GBP	No			No	
None	23/01/2024	23/01/2024	Draft	G10000359833	1,000.00 GBP	No			No	
None	23/01/2024	23/01/2024	Draft	G10000359833	1,000.00 GBP	No			No	

4.

‘Credit Note’

There are 2 options detailed below.

Completely Cancel Invoice with a credit note (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.

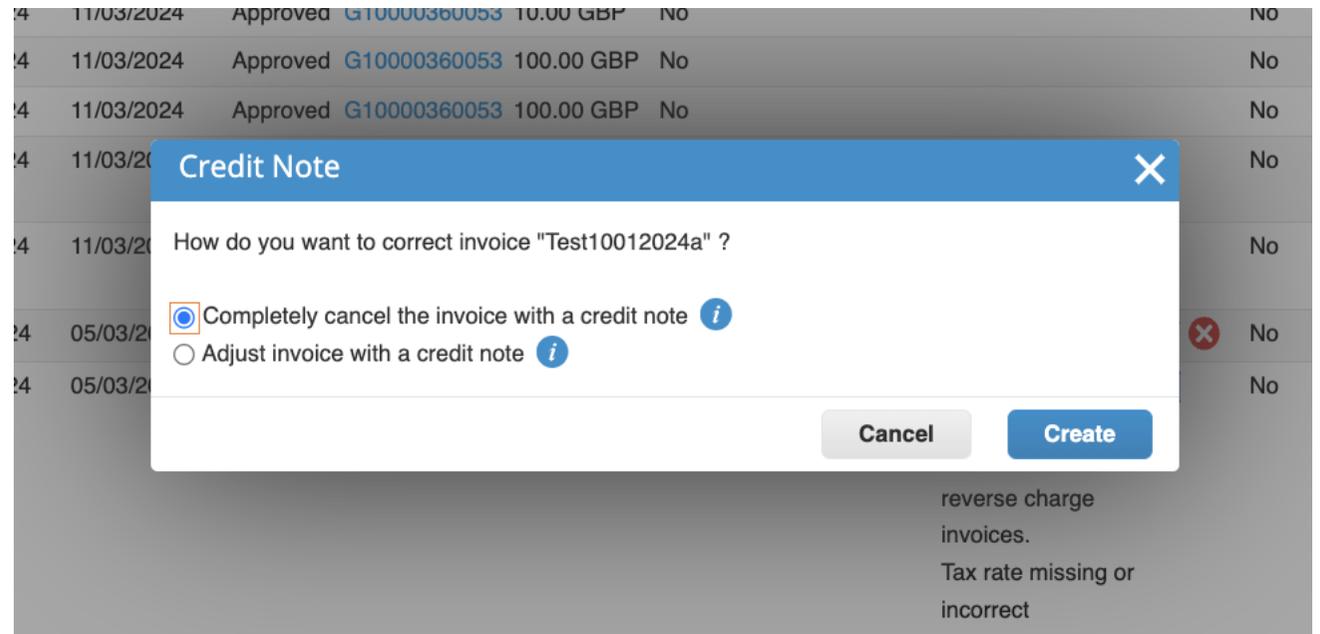
Adjust invoice with a credit note (not recommended Option) (section 9)

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.

Option 1 - Completely Cancel the Invoice with a Credit Note

Click **Completely Cancel Invoice with credit note** radio button

In Cancel Invoice, you cannot amend some of the information. Only Credit Note #, Credit Note Date and Credit reason is mandatory



5.

‘Create Credit Note (Header)’

Enter your Credit note number
(**Credit Note #**)

Enter **Credit Note Date** (same as original invoice date)

Attachments – If you’re a non-compliant country/ supplier, click add file and add a copy of your 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

6.

‘Credit Note (Lines)’

Click on **Calculate**

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

Click **Submit**

The screenshot shows a 'Total Taxes' summary table with the following data:

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

Below the table are five buttons: Delete, Cancel, Save as draft, Calculate, and Submit.

7.

‘Are you ready to send?’

Click **Send Credit note**

The screenshot shows a confirmation dialog box with the following content:

Are you ready to send? [Close]

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.

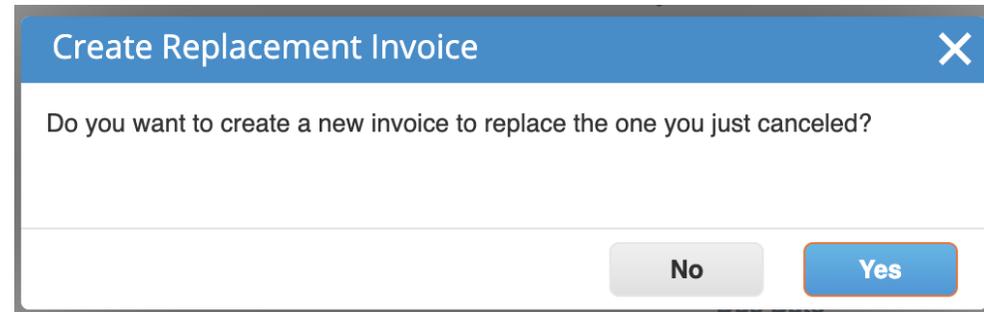
[Continue Editing] [Send Credit Note]

8.

'Create Replacement Invoice'

You will get a popup asking if you want to create a replacement invoice, Click **No** and go 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 invoice details and some fields are not editable. If you do click YES ensure you check the whole invoice before submitting.



9.

Option 2

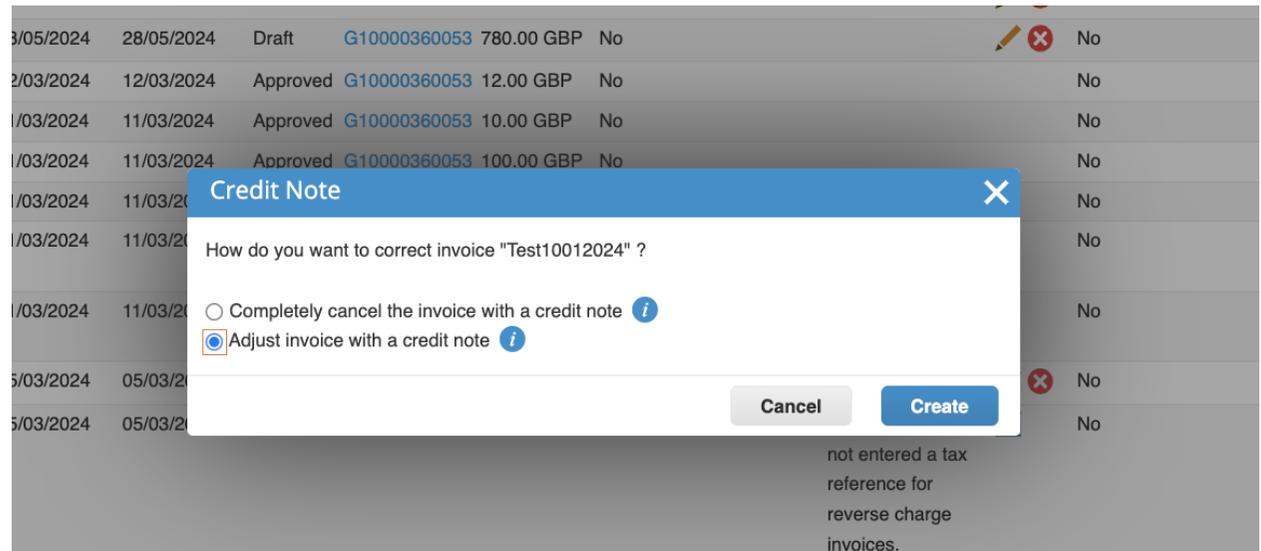
Adjust invoice with a credit note (not recommended option)

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 select adjust invoice with a credit

Click **Adjust invoice with a credit note** radio button

Click **Create**



10.

'Create Credit Note (Header)'

Enter your Credit note number
(**Credit Note #**)

Enter **Credit Note Date** (same as original
invoice date)

Attachments – If you're a non-compliant
country/ supplier, click add file and add a
copy of your 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
The Shard
London
SE1 9SG
United Kingdom
Ltd

* Remit-To Address
The Shard
London
SE1 9SG
United Kingdom

Bank Name:

Beneficiary Name:

Bank Account Number:

Sort Code:

* Ship-From Address
The Shard
London
SE1 9SG
United Kingdom

To

Customer

* Bill-To Address
Level 12 The Shard
32 London Bridge Street
London
SE1 9SG
United Kingdom

11.

'Create Credit Note (Lines)'

When you use the adjust option

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

PO Line B0120001094-1 **Service/Time Sheets Line** None **Contract** **Supplier part number**

CIS related cost? Select **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%	-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

12.

‘Credit Note (Lines)’

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

Click Submit

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

Buttons: Delete, Cancel, Save as draft, Calculate, Submit

13.

‘Are you ready to send?’

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.

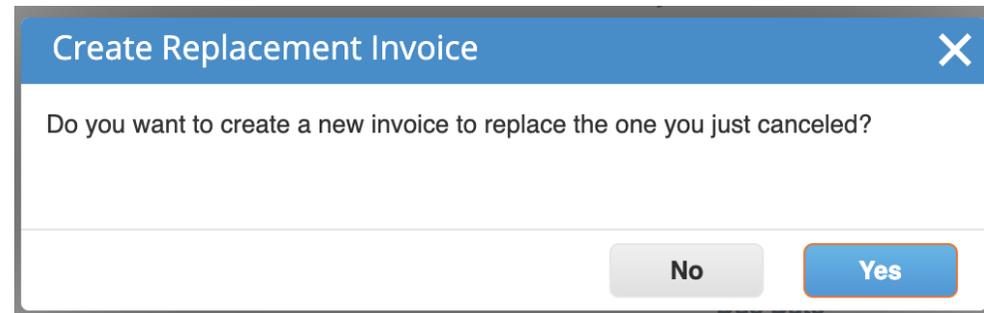
Buttons: Continue Editing, Send Credit Note

14.

‘Create Replacement Invoice’

You will get a popup asking if you want to create a replacement invoice, say No and go 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 invoice details and some fields are not editable. If you do click YES, ensure you check the whole invoice before submitting.



For all Coupa supplier help and guides Click [here](#) for Mitie Suppliers website.