

Coupa Supplier Portal

How to Create a Credit

22 May, 2019

Creating a credit from the CSP

When you log into the CSP, it will look similar to this:

The screenshot shows the Coupa Supplier Portal interface. At the top left is the 'coupa supplier portal' logo. On the right, there are user details: 'LYNN' with a dropdown arrow, 'NOTIFICATIONS 20', and 'HELP' with a dropdown arrow. Below this is a blue navigation bar with buttons for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The main content area is divided into two columns. The left column features a globe icon, a list of links: 'About', 'Industry', 'Website', 'Established', and 'Employees', and a blue 'Improve Your Profile' button. Below this is an 'About' section with a 'Public Profile' link and a URL: 'https://supplier-test.coupahost.com/suppliers/public/24391'. The right column has a 'Merge Accounts' section with explanatory text and a 'Click here' link. Below that is a 'Coupa Training Supplier' section with 'Request Merge' and 'Remove' buttons. At the bottom right is a 'Latest Customers' section.

- Please note, you will either need to register for the Coupa Supplier Portal or you will need to link your existing Coupa Account to the Trane Technologies Supplier Record
 - Reach out to CoupaTeam@TraneTechnologies.com to receive an invitation to register for the CSP or to link an existing account.

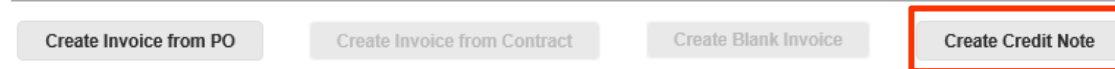
- First, log into your CSP Account [HERE](#)
- Go to the “Invoices Tab” in the bar at the top of the page

 coupa supplier portal

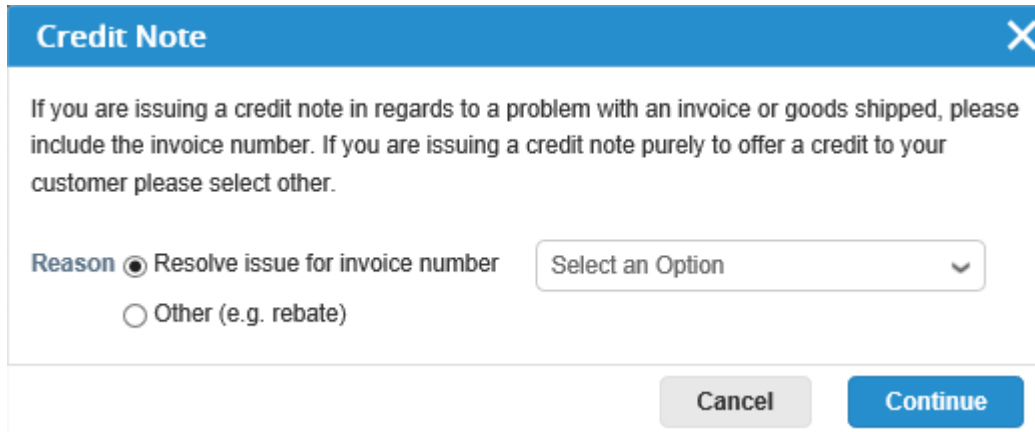



- On the right, click the Create Credit Note button.

Create Invoices 



- This will open a pop up.



Credit Note 

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

Other (e.g. rebate)

Cancel Continue

- Select your reason for creating the credit
 - Most will fall into the first category (Resolve issue for invoice number).
- Select the invoice to be credited from the drop down menu and click continue

- Select how you would like to correct the issue and click create.

Credit Note ✕

How do you want to correct invoice "US410-0001906172" ?

Completely cancel the invoice with a credit note i

Adjust invoice with a credit note i

Cancel Create

- This will bring you into the Credit.
- Fill out all fields marked with the red *
 - Most fields will auto-populate based on the information provided on the invoice

Create Credit Note Create

This credit note applies to invoice [12345](#). When approved, the credit will

General Info

* Credit Note #

* Credit Note Date 📅

Payment Term

* Currency ▼

Delivery Number

Status

Original Invoice #

Original Invoice Date

Image Scan Browse...

Supplier Note

Attachments i [Add File](#) | [URL](#) | [Text](#)

- Attach a PDF copy of your invoice in the “Image Scan” field

Image Scan

- Click Browse
- Select your file
- Click Open
- In the “Lines” section of the credit the values will auto populate.
 - If you’ve chosen to “Completely cancel the invoice with a credit note”, the values in the line section are not editable.
 - If you have chosen to “Adjust invoice with a credit note”, the values in the line section are editable.
 - To update the values being credited delete the value shown and enter the proper invoice amount.
- If you have an Amount based PO update the quantity shown with the quantity you are invoicing in the “Price” field.

☰ Lines

Adjustment Type Price

Type	Description	Price
	Purchase 1,800 hour	-4,500.00

- If you have a Quantity based PO update the quantity shown with the quantity you are invoicing in the “Qty” field.

☰ Lines

Adjustment Type Quantity

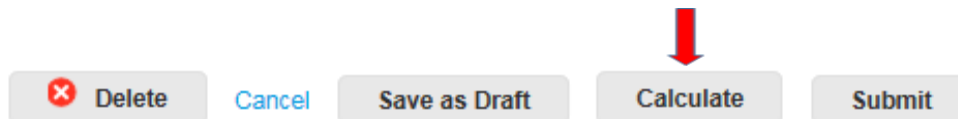
Type	Description	Qty
	Test Qty Order	-30.0

- No other changes are needed in the Lines section.
- Scroll to the bottom of the page to the Totals and Taxes section.
 - If shipping or tax were entered on the invoice you can edit the these amounts accordingly
 - If no shipping or tax was entered, you can skip this step.

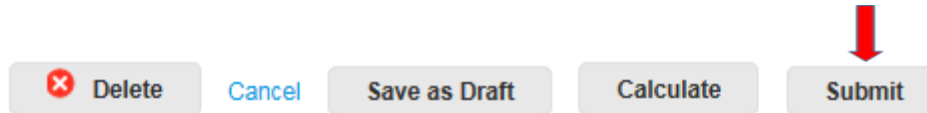
Totals & Taxes

Lines Net Total	36,428.60
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> 7 % <input type="text"/> 2,550.00
Total Tax	0.00
Net Total	36,428.60
Total	36,428.60

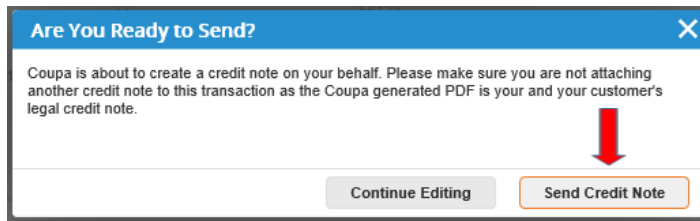
- Click the calculate button just under the Totals and Tax section
 - This will update the total value being credited based on the amount in the “Price” or “Qty” fields above and any additional charges edited into the Totals and Tax section.



- Click the submit button.



- Click the “Send Credit Note” button in the pop up.



- Congratulations, your credit is now submitted
- Once credits have been reviewed/received/approved the status will update to Approved or Disputed.