

# Coupa Supplier Portal User Guide

Create a Credit Note



## Create a Credit Note

### Create a credit note

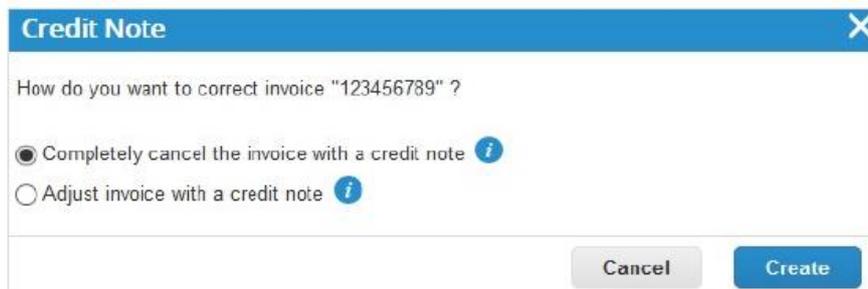
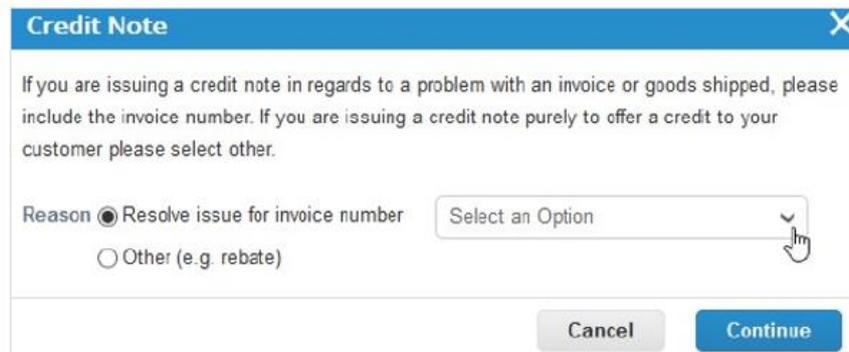
You can issue a credit note to:

- Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice.
- Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

To create a credit note:

1. Click on the Create Credit Note button above the Invoices table on the Invoices page or, on the Orders page, click on the Create Credit Note (👉) icon for the PO in the Actions column of the Purchase Orders table.
2. In the appearing Credit Note popup, select the reason for your credit note.

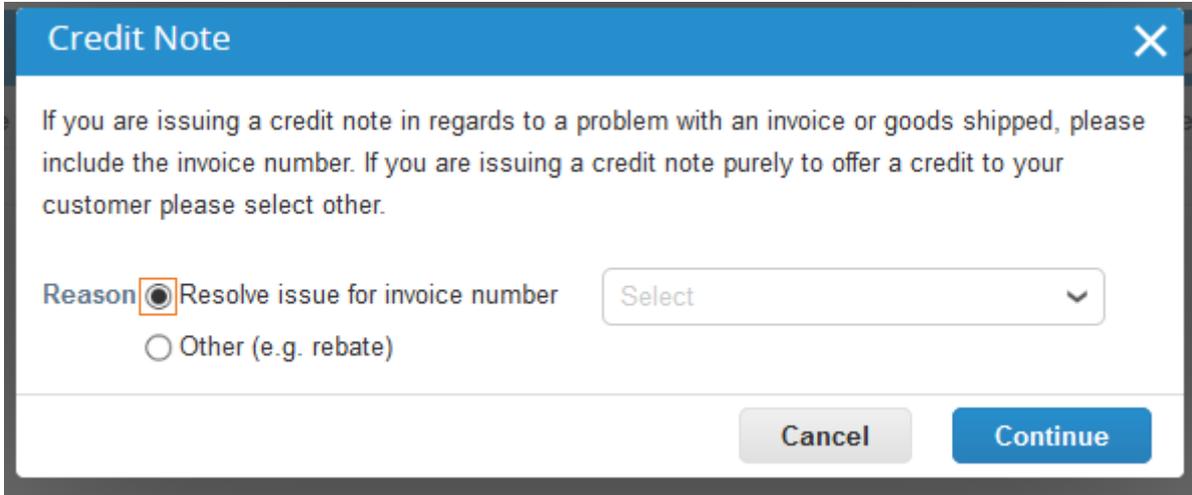
If the credit note is related to a problem with an invoice or the goods shipped, select the Resolve issue for invoice number radio button and, from the drop-down list, select the invoice number. Click Continue to select how you want to resolve the issue.



You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it.

### Record a credit

Select Other and click Continue. If a contract is available, you can also select it from the drop-down list.



Create the credit note similarly to creating an invoice.

If you completely cancel the invoice, you can edit the following fields: Credit Note Number, Supplier Note, and can also add attachments (file, URL, or text) and an Image Scan, and modify PO lines, as well as tax descriptions. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.

If you adjust the invoice, you can also edit the price or quantity. Line level taxes are carried over from the invoice and are prorated based on the credit amount.

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