



IMS Health & Quintiles are now



# Coupa for Suppliers

Coupa Supplier Portal (CSP) – Create or Edit Credit Note

## 4. Create or Edit Credit Note

# Create a Credit Note

You can issue a credit note to:

- Resolve a dispute on an invoice.
- Record miscellaneous credit, for example, return/cancelation of goods, price adjustments, rebates and refunds.

Credit notes can be issued against invoices only, not POs

To create a credit note please:

1. click on the **Invoices** tab on the main menu
2. click on the **Create Credit Note** button

**coupa** supplier portal ABHAY ▾ | NOTIFICATIONS 4 | HELP ▾

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Add-ons Admin

Select Customer IQVIA ▾

## Invoices

**Instructions From Customer**  
Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

Create Invoices ⓘ

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

Export to ▾ View All ▾ Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
NY111	08/05/19	Pending Approval	966	11,105.00 USD	No	

Per page 15 | 45 | 90

In the appearing **Credit Note** popup, select the reason for your credit note.

## Resolve a dispute

1. Select the **Resolve issue for invoice number**
2. From the drop-down list, select the invoice number.
3. Click **Continue** to select how you want to resolve the issue.

You can choose to issue a credit note :

- a) to [completely cancel the invoice](#) with a credit note or
- b) to [adjust invoice with a credit note](#)

1

**Credit Note** X

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)

Select an Option

Cancel Continue

2

**Credit Note** X

How do you want to correct invoice "NY111" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel Create

# Cancel the invoice with a credit note

Window with creating Credit Note will appear.

You can edit only the following fields: **Credit Note #**, **Credit Note Date** and **Credit Reason**. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.

When approved, the credit will fully cancel the invoice's impact to the transaction.

The screenshot shows the 'Create Credit Note' form in the Coupa Supplier Portal. The form is titled 'Create Credit Note' and includes a 'Create' button. A yellow banner states: 'This credit note applies to invoice NY111. When approved, the credit will fully cancel the invoice's impact to the transaction.' The form is divided into 'General Info' and 'From' sections. The 'General Info' section includes fields for 'Credit Note #', 'Credit Note Date' (08/06/19), 'Payment Term' (ZB05\_N5), 'Currency' (USD), 'Delivery Number', 'Status' (Draft), 'Original Invoice #' (NY111), 'Original Invoice Date' (08/01/19), 'Image Scan' (Choose File), and 'Supplier Note'. The 'From' section includes 'Supplier' (ABHAY LADDU C0000319), 'Supplier Tax ID' (15256853), 'Invoice From Address' (ABCD, 2341 Summit Ave., Brooklyn, NY 11234, United States), 'Remit-To Address' (ABCD, 2341 Summit Ave., Brooklyn, NY 11234, United States), and 'Ship From Address' (ABCD, 2341 Summit Ave., Brooklyn, NY 11234, United States). The 'To' section includes 'Customer' (IQVIA), 'Bill To Address' (IQVIA Market Intelligence LLC, P O Box 14325, Research Triangle Park, NC 27709, United States), 'Buyer Tax ID' (None), and 'Ship To Address' (201 BROADWAY, CAMBRIDGE, MA 02128-4665).

The screenshot shows the 'Lines' form in the Coupa Supplier Portal. The form is titled 'Lines' and includes an 'Adjustment Type' dropdown set to 'Price'. The form displays a table with the following data:

Type	Description	Price	
	test supplier 2 line	-10,000.00	-10,000.00

Below the table, there are fields for 'PO Line' (906-1), 'Contract', and 'Supplier Part Number'. The 'Billing' section shows 'QUBOS-64450-162-683-623220'. The 'Taxes' section includes a table with the following data:

Tax Description	Tax Rate	Tax Amount	Tax Reference
	10.000	-1,000.00	

The 'Totals & Taxes' section includes a table with the following data:

Lines Net Total	
	-10,000.00
Lines Tax Totals	-1,000.00

Below the table, there are fields for 'Shipping' (-100.000), 'Tax' (5.0 %), 'Tax Reference', 'Misc' (0.000), and another 'Tax' field (%). The 'Total Tax' is -1,005.00 and the 'Net Total' is -10,105.00. The 'Total' is -11,105.00. The form includes buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'.

# Adjust the information on invoice lines

Window with creating Credit Note will appear

You can edit the following fields: **Credit Note #**, **Credit Note Date**, **Credit Reason**, and **Line adjustment information** (for example, price and quantity). For invoices with multiple lines you can edit the price of each line separately. Line level taxes are carried over from the invoice and are prorated based on the credit amount. When approved, the credit will adjust the invoice's impact to the transaction.

The screenshot shows the 'Create Credit Note' form in the Coupa Supplier Portal. The form is titled 'Create Credit Note' and includes a 'Select Customer' dropdown set to 'IQVIA'. A yellow banner states: 'This credit note applies to invoice NY111. When approved, the credit will adjust the invoice's impact to the transaction.' The form is divided into 'General Info' and 'From' sections. The 'General Info' section includes fields for 'Credit Note #', 'Credit Note Date' (08/06/19), 'Payment Term' (ZB05\_N5), 'Currency' (USD), 'Delivery Number', 'Status' (Draft), 'Original Invoice #' (NY111), 'Original Invoice Date' (08/01/19), 'Image Scan' (Choose File), and 'Supplier Note'. The 'From' section includes 'Supplier' (ABHAY LADDU C0000319), 'Supplier Tax ID' (15256853), 'Invoice From Address' (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), 'Remit-To Address' (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), and 'Ship From Address' (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States). The 'To' section includes 'Customer' (IQVIA), 'Bill To Address' (IQVIA Market Intelligence LLC, P O Box 14325, Research Triangle Park, NC 27709, United States), 'Buyer Tax ID' (None), and 'Ship To Address' (201 BROADWAY, CAMBRIDGE, MA 02130-1955, United States). The 'Attachments' section at the bottom left has options for 'Add File', 'URL', and 'Text'.

The screenshot shows the 'Lines' form in the Coupa Supplier Portal. The form is titled 'Lines' and includes an 'Adjustment Type' dropdown set to 'Price'. The form is divided into 'Type', 'Description', 'Price', 'PO Line', 'Contract', 'Supplier Part Number', 'Billing', 'Taxes', and 'Totals & Taxes' sections. The 'Type' section includes 'Type' (test supplier 2 lines) and 'Price' (-10,000.00). The 'PO Line' section includes 'PO Line' (900-1) and 'Contract'. The 'Supplier Part Number' section includes 'Supplier Part Number'. The 'Billing' section includes 'Billing' (QUBOS-64450-182-883-923220). The 'Taxes' section includes a table with columns for 'Tax Description', 'Tax Rate', 'Tax Amount', and 'Tax Reference'. The 'Totals & Taxes' section includes a table with columns for 'Lines Net Total', 'Lines Tax Totals', 'Shipping', 'Tax', 'Tax Reference', 'Misc', 'Tax', 'Tax Reference', 'Total Tax', 'Net Total', and 'Total'. The 'Total' is -11,000.00. The form also includes an 'Add Tag' button and a 'Delete' button at the bottom right.

# View existing credit notes

1. Select **Invoices** page
2. Find **View** drop-down list to filter what type of columns you would like to be visible
3. In the appearing pop-up, choose “**Credit notes**”.

The screenshot shows the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Invoices' menu item is highlighted with a red box and a '1' in a red circle. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'IQVIA'. The main content area is titled 'Invoices' and contains an 'Instructions From Customer' section. Below this, there is a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is displayed with columns for 'Invoice #', 'Created Date', 'Status', 'PO #', and 'Total'. The 'View' dropdown menu is open, showing a list of status filters, with 'Credit Notes' highlighted by a red box and a '3' in a red circle. The 'Create Credit Note' button is also visible.

**Instructions From Customer**

Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

Create Invoices ⓘ

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Actions
None	08/06/19	Draft	966	-11,105.00 USD	
NY111	08/05/19	Pending Approval	966	11,105.00 USD	

Per page 15 | 45 | 90