



Coupa – Create credit notes

Supplier Instructions

GFSS Procurement – April 2026



Create a credit note

You can issue a credit note to:

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

Credit notes can be issued against invoices only, not POs.

To create a credit note:

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

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and user information 'ABHAY', 'NOTIFICATIONS 4', and 'HELP' are on the right. A blue navigation bar contains the following tabs: Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a red box and a red circle with the number 1), Catalogs, Add-ons, and Admin. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'IQVIA' selected. The main content area is titled 'Invoices' and contains an 'Instructions From Customer' section with a warning message. Below this is a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and **Create Credit Note** (highlighted with a red box and a red circle with the number 2). At the bottom, there is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The table contains one row with the following data: NY111, 08/05/19, Pending Approval, 966, 11,105.00 USD, No. Below the table, it says 'Per page: 15 | 45 | 90'.



Create a credit note

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 :

- to completely cancel the invoice with a credit note or
- to adjust invoice with a credit note

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)

[Cancel] [Continue]

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]



Create 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.

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

Select Customer

Create Credit Note Create

This credit note applies to invoice NY111. When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info	From
* Credit Note # <input type="text"/>	* Supplier ABHAY LADDU C0000319
* Credit Note Date 08/06/19 <input type="text"/>	Supplier Tax ID 15256853 <input type="text"/>
Payment Term ZB05_N5	* Invoice From Address ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
* Currency USD <input type="text"/>	* Remit-To Address ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
Delivery Number <input type="text"/>	* Ship From Address ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
Status Draft	
Original Invoice # NY111	
Original Invoice Date 08/01/19	
Image Scan <input type="button" value="Choose File"/> No file chosen	
Supplier Note <input type="text"/>	
Attachments <input type="button" value="Add File"/> URL Text	
	To
	Customer IQVIA
	* Bill To Address IQVIA Market Intelligence LLC P O Box 14325 Research Triangle Park, NC 27709 United States
	Buyer Tax ID None
	Ship To Address 201 BROADWAY CAMBRIDGE, MA 02148

Lines

Adjustment Type Price

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

PO Line 966-1 Contract Supplier Part Number

Billing QUBOS-54450-162-883-923220

Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="text"/>	10.000	-1,000.00	<input type="text"/>

Totals & Taxes

Lines Net Total	-10,000.00
Lines Tax Totals	-1,000.00
Shipping	-100.000
Tax	5.0 % -5,000
Tax Reference	<input type="text"/>
Misc	0.000
Tax	% 0.000
Tax Reference	<input type="text"/>
Total Tax	-1,005.00
Net Total	-10,105.00
Total	-11,105.00



Create a credit note

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"**.

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	Actions
None	08/08/19	Draft	966	-11,105.00 USD	✏️ ✖️
NY111	08/05/19	Pending Approval	966	11,105.00 USD	

Per page 15 | 45 | 90

View dropdown menu items:
All
Abandoned
Approved
Credit Notes
Disputed
Disputes with a supplier response
Disputes without supplier response
Draft
Payment Information
Pending Approval
Processing
Voided
Create View