


Creating a Credit Note with no Invoice

Creating a Non-Invoice Backed Credit Note

- a) Click on “Invoices” tab & select “Create Credit Note”
- b) Select the reason as “Other (e.g. rebate)”
- c) Fill out all the fields with an asterisk (*) (Note: “Credit Note #” must have less than 20 characters in the field)
- d) Attach details in the “Attachments” field
- e) Select “Type”, and depending upon the type selected edit either the “Qty” or “Price” as a negative number, not both
- f) Enter “Description” and “Billing” information
- g) Enter line level or header level taxes by selecting the “Line Level Taxation” check box or selecting taxes at the header level respectively
- h) Add additional lines by clicking on the icon  Add Line
- i) Repeat steps (f) - (i) for each additional line
- j) Enter “Shipping”, “Handling”, and “Misc” as negative charges, if applicable, as a separate line item (Note: only enter pre-tax amounts in these fields)
- k) Click on the “Calculate” button, and then click on “Submit”

Coupa Link:

<https://supplier.coupahost.com>

Support Email:

B2B.Support@nal.ca

Tips:

- ✓ Never enter both “Qty” and “Price” as a negative number
- ✓ Clicking on “Calculate” button prior to submitting the invoice helps you validate the total prior to submitting
- ✓ For billing strings, only “Type”, “AFE#”, “CC#”, “Major” & “Minor” require to be selected; all others default based on the above choices

Coupa Credit Note Page: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Work_with_the_CSP/Create_a_Credit_Note

Coupa Support Videos: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/02_CSP_Videos