

Creating a Credit Note against an Invoice



Creating a Credit Note

- a) Click on “Invoices” tab & select “Create Credit Note”
- b) Select the reason as “Resolve Issue for invoice number”
- c) Select an invoice against which you wish to create a credit note and click “Continue”
- d) Fill out all the fields with an asterisk (*) (Note: “Credit Note #” must have less than 20 characters in the field)
- e) Attach details in the “Image Scan” field
- f) Select “Adjustment Type” as either the “Quantity” or “Price” or “Other” (Note: if in (5) you selected the option “Completely cancel the invoice with a credit note”, then all invoice line details will be automatically populated)
- g) Adjust the “Qty” or “Price” as a negative number, not both
- h) Enter “Shipping”, “Handling”, and “Misc” as negative charges, if applicable, as a separate line item (Note: only enter pre-tax amounts in these fields)
- i) 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