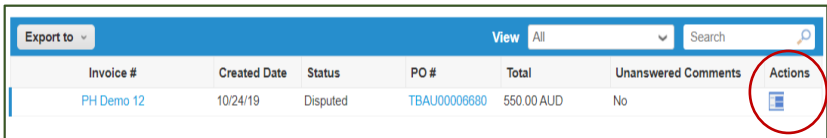


## Correcting Invoices in Disputed or Approved Status

These steps will outline how to correct an invoice in Disputed or Approved Status in Coupa Supplier Portal (CSP).

Steps	Item	Description
1	Action	Open Coupa Supplier Portal <a href="http://supplier.coupahost.com/">http://supplier.coupahost.com/</a> Note: The use of Google Chrome is recommended
2	Action	Log into your Coupa Supplier Portal <a href="http://supplier.coupahost.com">http://supplier.coupahost.com</a>
3	Info	<p>If an invoice is in Pending Approval status, you may coordinate with your customer to determine the reason it is pending. If you need to correct your invoice, please request your customer to dispute the invoice.</p> <p>When the status of an invoice changes to "Disputed", you will receive an email notification. Your customer can leave comments on the invoice while it is in "Disputed" status.</p> <p>Disputed invoices will not be processed for payment until a resolution has been made.</p> <p>If you experience the below issues, proceed with these actions:</p> <ul style="list-style-type: none"> <li>• <b>Incorrect amount or quantity:</b> Issue a partial credit note</li> <li>• <b>Other incorrect information (incorrect tax rate or item description):</b> issue a full credit note to cancel the invoice and a new corrected invoice</li> <li>• <b>Duplicate invoice:</b> Issue a full credit note to cancel</li> </ul>
4	Action	<p><b>To resolve an Invoice in Disputed Status</b>, in the Invoices table, click on the Resolve button in the Actions column.</p>  <p>You will have below options to resolve the invoice:</p> <p><b>Cancel Invoice:</b> If this invoice was issued in duplicate, or if you require to amend non price or quantity on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancelation credit note and a replacement invoice creation.</p> <p><b>Adjust:</b> If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit note to reduce quantity, reduce price or issue an amount-based credit.</p>

- 5 Action Scroll to the bottom section of the invoice and click the appropriate button.

Totals & Taxes		
Lines Net Total		500.00
Lines GST Totals	GST 10%	50.00
Shipping		0.00
Handling		0.00
Misc		0.00
Total GST		50.00
Net Total		500.00
<b>Gross Total</b>		<b>550.00</b>

Cancel Invoice Adjust

If you select **Cancel Invoice**, a yellow bar will appear confirming the credit will fully cancel the invoice.

This credit note applies to invoice 123456. When approved, the credit will fully cancel the invoice's impact to the transaction.

If you select **Adjust**, the yellow bar will appear confirming the credit will adjust the invoice.

This credit note applies to invoice 123456. When approved, the credit will adjust the invoice's impact to the transaction.

- 6 Action **Correcting an Invoice in Approved status**

If an invoice is in approved status, but the invoice needs correction, you must create a credit note from the invoices tab.

Go to **Invoices** tab, then click Create a Credit Note.

coupa supplier portal

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

Select Customer CBRE

**Invoices**

Instructions From Customer

When creating an e-invoice please make sure that 1. Unit of measure of the invoice line is consistent with the unit of measure of the related PO line 2. Invoice currency is consistent with the PO currency 3. Price per UOM is consistent with the PO. Only update the price per UOM compared to the PO in case additional charges (freight, handling) have been incurred that were not included on the PO. When creating a credit note in addition to the above stated, please make sure that 1. the unit price is positive 2. the quantity is negative Invoice status 'disputed' indicates invoices rejected by the approver with rejection comment in the comment section of the invoice. A new draft invoice will be created once you try to resubmit the invoice. All fields will be automatically populated. You can make the adjustment and submit the new invoice. The disputed invoice will be voided automatically.

Create Invoices

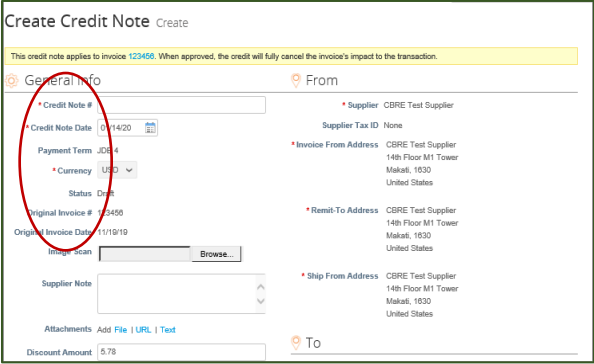
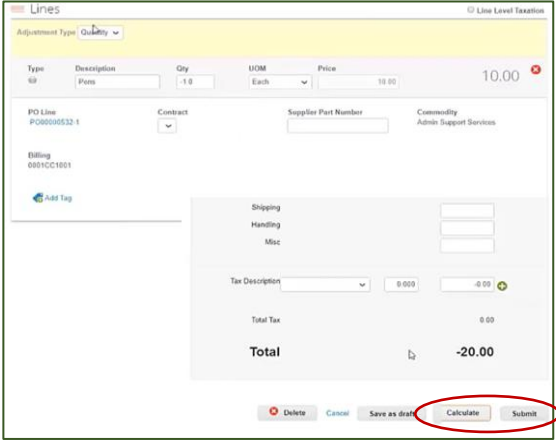
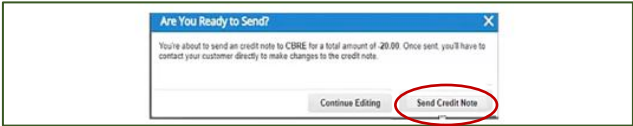
Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

If you select 'completely cancel the invoice with a credit note', a yellow bar will appear confirming the credit note will fully cancel the invoice.

This credit note applies to invoice 123456. When approved, the credit will fully cancel the invoice's impact to the transaction.

If you select 'adjust invoice with a credit note', the yellow bar will appear confirming the credit note will adjust the invoice.

This credit note applies to invoice 123456. When approved, the credit will adjust the invoice's impact to the transaction.

7	Action	<p><b>Creating a Credit Note</b></p> <p>If you are required to create a Credit Note, populate all required fields marked as mandatory.</p> <p>Note: Credit Note number: please provide the <b>PO/Invoice number that you wish to credit and add the letter “C” on the end</b>. This will help the easy identification of credit notes.</p> 
8	Action	<p>Adjust the quantity and amount.</p> <ul style="list-style-type: none"> <li>• A credit note for Products/Quantity should have a negative quantity.</li> <li>• A credit note for Services should have a negative amount.</li> </ul> <p>Click “Calculate” and “Submit”.</p> 
9	Action	<p>After clicking Submit, click the “Send Credit Note” button if you are done with the editing.</p> <p>If you wish to continue editing just click the “Continue Editing” button.</p> 

10	Info	Your Credit Notes will be listed together with your Invoices, however, Credit Notes shows a negative amount.																					
		<div><div>Invoices</div><div><div>Instructions From Customer</div><div>When creating an e-invoice please make sure that 1 Unit of measure of the invoice line is consistent with the unit of measure of the related PO line 2 Invoice currency is consistent with the PO currency 3 Price per UOM is consistent with the PO. Only update the price per UOM compared to the PO in case additional charges (freight handling) have been incurred that were not included on the PO. 10) when creating a credit note in addition to the above stated, please make sure that: 1. the unit price is positive 2. the quantity is negative invoice status: Disputed indicates invoices rejected by the approver with rejection comment in the comment section of the invoice. A new draft invoice will be created once you try to resubmit the invoice. All fields will be automatically populated. You can make the adjustment and submit the new invoice. The disputed invoice will be voided automatically.</div></div></div> <div><div>Export to: <div></div></div><div><div>View: All</div><div>Search: <div></div></div></div><table><tr><th>Invoice #</th><th>Created Date</th><th>Status</th><th>PO #</th><th>Total</th><th>Unapproved Comments</th><th>Actions</th></tr><tr><td>123456</td><td>02/26/18</td><td>Processed</td><td>PO00000532</td><td>-28.00 USD</td><td>No</td><td></td></tr><tr><td>12345</td><td>02/26/18</td><td>Pending Approval</td><td>PO00000532</td><td>36.00 USD</td><td>No</td><td></td></tr></table><div>Per page: 15 45 90</div><div><div>Invoice Against Contract</div><div>Create</div><div>Credit note</div></div></div>	Invoice #	Created Date	Status	PO #	Total	Unapproved Comments	Actions	123456	02/26/18	Processed	PO00000532	-28.00 USD	No		12345	02/26/18	Pending Approval	PO00000532	36.00 USD	No	
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12345	02/26/18	Pending Approval	PO00000532	36.00 USD	No																		
11	Info	End of Procedure.																					
12	Info	For more information about COupa, please visit the <a href="#">Coupa Training Portal</a> page.																					