Supplier Guidance – Credit Memos

Credits should be submitted against the associated invoice in Coupa. Follow the step-by-step guide to enter these credits here.

If the credit cannot be submitted against the original invoice, follow these steps to create the credit on the Purchase Order in Coupa.

Common Use Cases:

- Consolidated credit impacting multiple invoices (if possible, please submit separate credits to each invoice following the guidance in the link above).
- Credit amount is greater than the original invoice amount.
- There is no original invoice.

To process a credit against the Purchase Order:

1. Go to the Coupa Supplier Portal (CSP) and login.
2. Click on the Orders tab to view Purchase Orders.
3. Search for the applicable PO.
4. Click on the red coins to the right in the Actions column.

5. Fill out the required fields – all fields marked with the red '*' are required.
6. The Credit Note number must be unique and match the number in the attached credit memo.
7. Attach the credit PDF using the Add File link by Attachments.

Home   Profile   Forecasts   Orders   Service/Time Sheets   ASN   Invoices   Catalogs   Business Performance   Sourcing   Add-ons

Setup

Orders   Order Lines   Returns   Order Changes   Order Line Changes   Order Confirmations   Order Confirmation Lines   Promised Deliveries   Shipments

Select Customer   PGE

Create Credit Note Create

General Info

* Credit Note #

* Credit Note Date   02/27/24

* Payment Term   NET 30 DAYS

* Currency   USD

Status   Draft

Original Invoice #

Original Invoice Date   mm/dd/yy

Image Scan   Choose File   No file chosen

Supplier Note

* Attachments   Add File | URL | Text

From

* Supplier   MORGAN INDUSTRIAL INC

Supplier Tax ID   92-1525214

* Invoice From Address   MORGAN INDUSTRIAL
121 SW SALMON ST
PORTLAND, OR 97024
United States

* Remit-To Address   MORGAN INDUSTRIAL
121 SW SALMON ST
PORTLAND, OR 97024
United States

* Ship From Address   MORGAN INDUSTRIAL
121 SW SALMON ST
PORTLAND, OR 97024
United States

To

8. Remove or edit Purchase Order lines
   a. If a purchase order line needs to be deleted or you are invoicing against a purchase order with multiple lines, please click on the red X next to the line.
   b. Edit the line details as needed (QTY, Price, Total)
9. Once the lines are updated, click 'Calculate' at the bottom of the invoice.
10. Review for accuracy and click 'Submit'.

Lines

☐ Line Level Taxation

Adjustment Type   Price

Type	Description	Price	
🟢	MPLS Item Storage	-25.00	-25.00 ❌

PO Line   Service/Time Sheet Line   Contract   Supplier Part Number
0000036558-1 🔍 Clear   None

Manufacturer Name   Manufacturer Part Number   PGE Part Number   Freight Terms
None   None   None   None

Billing

Total Tax	0.00
Net Total	-25.00
Total	**-25.00**

Delete   Cancel   Save as Draft   Calculate   Submit

PGE