

# Managing Invoices and Credit Notes

April 2024

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# 01

## Course Outline

### Description

This course explains how to create invoices and credit notes on the Coupa Supplier Portal

### Objectives

**After completing this course, you will be able to:**

1. Create an invoice from a purchase order
2. Create an invoice from a contract
3. Create a credit note
4. Resolve a disputed credit note

# 02

## How to Create an Invoice From a Purchase Order



# How to Create Invoices in the CSP (Flipping a PO)

The CSP allows you to quickly transfer a PO into an invoice (i.e., flip a PO) and send to your customers.

## Process Steps:

- 1 To create a invoice navigate to the orders tab
- 2 To create an invoice, click on the stack of gold coins.

**coupa** supplier portal

DELOITTE | NOTIFICATIONS 22 | HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance

Sourcing Add-ons Setup

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

Select Customer EDF Renewables (Pty) Ltd

### Purchase Orders

**Instructions From Customer**  
{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		

# How to Create Invoices in the CSP (Flipping a PO)

If you do not have a remit to address set up against your CSP profile, Coupa will prompt you to create one prior to sending an invoice.

## Process Steps:

4 Click 'Add New' to add a remit-to address

5 Populate the official name of your business registered with the local government and the country

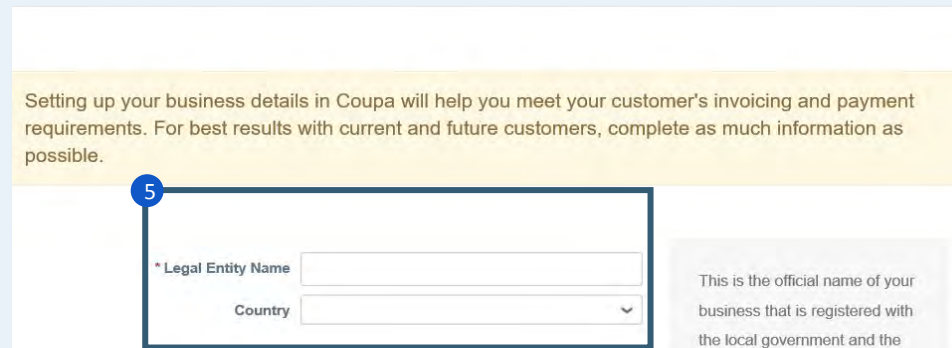


Choose Invoicing Details

\* Legal Entity Select + Add New

\* Remit-To Select

\* Ship From Address Select



Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the

# How to Create Invoices in the CSP (Flipping a PO)

If you do not have a remit to address set up against your CSP profile, Coupa will prompt you to create one prior to sending an invoice.

## Process Steps:

6 Populate the address of your legal entity.

7 Banking details  
Populate banking information.

Ensure the banking details is aligned to the banking details you have provided to EDF in the banking confirmation letter you shared

What address do you invoice from?

6

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country: South Africa

☒ Use this address for Remit-To

☒ Use this for Ship From address

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location where you receive government documents.

\* Payment Type: Bank Account

Banking information

7

Bank Account Country: South Africa

Bank Account Currency:

\* Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Bank Code

\* Account Number:

Confirm Account Number:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

# How to Create Invoices in the CSP (Flipping a PO)

After you have created a remit to address, you can create invoices from the CSP.

## Process Steps:

- 1 Invoice #**  
Populate the invoice number generated by your finance system
- 2 Invoice Date**  
Populate the date the invoice was created in your finance system
- 3 Date of Supply**  
The date when the good/service was supplied /rendered

Select Customer

EDF Renewables (Pty) Ltd

Create Invoice Create

1

\* Invoice #

2

\* Invoice Date

29/01/2024

Payment Term

30 DAYS

3

Date of Supply

29/01/2024

\* Currency

ZAR

Delivery Number

Status

Draft

Image Scan

Choose File

No file chosen

Supplier Note

Attachments

Add

File

URL

Text

From

\* Supplier

Deloitte Consulting Pty Ltd 1

\* Supplier VAT ID

4999999999

\* Invoice-From Address

Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address

Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
1687  
South Africa

Bank Name:


Standard Bank

Beneficiary Name:


Deloitte Consulting Pty Ltd

Bank Account Number:

\*\*\*\*\*0430

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# How to Create Invoices in the CSP (Flipping a PO)

After you have created a remit to address, you can create invoices from the CSP.


## Process Steps:


- 4 Delivery Number**  
Populate the delivery number if applicable
- 5 Supplier Note**  
You can use the textbox to send a note to EDFR, this note will be visible to the creator of the PO as well as the Accounts Payable team.
- 6 Attachments**  
Here you can attach any supporting documents (e.g. Delivery note) if necessary (this is not mandatory).

Select Customer

EDF Renewables (Pty) Ltd

Create Invoice Create


 General Info

 From

\* Invoice #

\* Invoice Date

29/01/2024




Payment Term


30 DAYS


Date of Supply

29/01/2024



\* Currency

 ZAR



Delivery Number

Status

Draft


Image Scan

Choose File

No file chosen

Supplier Note

Attachments


 Add [File](#) | [URL](#) | [Text](#)

\* Supplier

Deloitte Consulting Pty Ltd 1

\* Supplier VAT ID

4999999999



\* Invoice-From Address

Deloitte Consulting Pty Ltd

5 Magwa Crescent

Waterfall City

Johannesburg

2090

South Africa

\* Remit-To Address

Deloitte Consulting Pty Ltd

5 Magwa Crescent

Waterfall City

1687


South Africa

Bank Name:


Standard Bank

Beneficiary Name:

Deloitte Consulting Pty Ltd

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# How to Create Invoices in the CSP (Flipping a PO)

You can generate invoices from this section of the CSP.

## Process Steps:

7

### Qty

Populate the quantity you are invoicing for.

**\*You can partially invoice**

8

### Price

The price you are invoicing for.

9

### VAT rate

Populate the VAT rate of the goods/services

10

**Delete** : Deletes the invoice.

**Cancel** : Cancels the edit page of the invoice

**Save as draft** : Saves the invoice as a draft.

**Calculate** : calculates the total amount / value of the invoice. Click on 'Calculate' for the total including VAT.

11

### Submit

Submits the invoice to EDF .

The screenshot displays the 'Lines' section of the Coupa CSP interface. It features a table with columns for 'Type', 'Description', 'Qty', 'UOM', 'Price', and a total price of 50,000.00. A callout '7' points to the 'Qty' field, which contains the value '10'. Below this, another 'Lines' section shows a line item for 'Coupa services' with a price of 100,000.00, highlighted by callout '8'. Further down, the 'PO Line' is 'EDF000104-1', 'Service/Time Sheet Line' is 'None', and 'Contract' is 'Testing Contract template 1 (P)'. The 'Billing' section shows 'PI-Inside RSA'. The 'Taxes' section has a 'VAT Rate' dropdown highlighted by callout '9', with 'VAT Amount' at 0.00 and 'Tax Reference' empty. At the bottom, a navigation bar contains buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit', with callout '10' pointing to the 'Delete' button and callout '11' pointing to the 'Submit' button.

# Invoice Statuses

Types of invoices statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. For more information, see <a href="#">Disputed invoices</a> .
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries, for example, Mexico. It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.

# 03

## How to Create an Invoice From a Contract

# How to Create Invoices From a Contract

You can create an invoice directly from a contract.

## Process Steps:

- 1 Login to the Coupa Supplier Portal and Navigate to the invoices tab
- 2 To create an invoice from a contract, click on **"Create Invoice from Contract"**
- 3 Select the contract you want to create an invoice for
- 4 To create the invoice, click on **"Create"**

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices (highlighted with a blue box and a '1' in a circle), Catalogues, Business Performance, and Sourcing. Below this, the 'Invoices' section is active, showing tabs for Invoices, Invoices Lines, and Payment Receipts. A 'Select Customer' dropdown menu is set to 'EDF Renewables (Pty) Ltd - Deloitte Consulti...'. The main heading is 'Invoices', followed by 'Instructions From Customer' and a note: '(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)'. Below this, there is a 'Create Invoices' section with three buttons: 'Create Invoice from PO', 'Create Invoice from Contract' (highlighted with a blue box and a '2' in a circle), and 'Create Blank Invoice'. A 'Select Contract' modal window is open, showing a 'Select a Contract' dropdown menu with 'Testing' selected (highlighted with a blue box and a '3' in a circle). At the bottom of the modal, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a blue box and a '4' in a circle.



# How to Create Invoices From a Contract

You can create an invoice directly from a contract.

## Process Steps:

- 1 Invoice #**  
Populate the invoice number generated by your finance system
- 2 Invoice Date**  
Populate the date the invoice was created in your finance system
- 3 Date of Supply**  
The date when the good/service was supplied /rendered
- 4 Contract**  
The contract you are invoicing against

Select Customer: EDF Renewables (Pty) Ltd - Deloitte Consulti...

### Create Invoice Create

#### General Info

1 \* Invoice #

2 \* Invoice Date 22/03/2024

Payment Term 30 DAYS

3 Date of Supply 22/03/2024

\* Currency ZAR

Delivery Number

Status Draft

4 Contract Testing

Image Scan  No file chosen

Supplier Note

Attachments  [File](#) | [URL](#) | [Text](#)

#### From

\* Supplier Deloitte & Touche

\* Supplier VAT ID 4999999999

\* Invoice-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
1687  
South Africa

Bank Name: Standard Bank

Beneficiary Name: Deloitte Consulting Pty Ltd

Bank Account Number: \*\*\*\*\*0430

SWIFT Code: \*\*\*\*\*7389

Bank Code: \*\*\*\*

\* Ship-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Midrand  
Gauteng  
2066  
South Africa

# How to Create Invoices From a Contract


You can create an invoice directly from a contract.


## Process Steps:

- 4 **Delivery Number**  
Populate the delivery number if applicable
- 5 **Supplier Note**  
You can use the textbox to send a note to EDFR, this note will be visible to the creator of the PO as well as the Accounts Payable team.
- 6 **Attachments**  
Here you can attach any supporting documents (e.g. Delivery note) if necessary (this is not mandatory).


Select Customer EDF Renewables (Pty) Ltd

## Create Invoice Create


 **General Info**



 **From**

\* Invoice #

\* Invoice Date  

Payment Term 30 DAYS

Date of Supply  


\* Currency  ZAR 

Delivery Number


Status Draft


Image Scan  No file chosen


Supplier Note

Attachments  Add [File](#) | [URL](#) | [Text](#)

\* Supplier Deloitte Consulting Pty Ltd 1


\* Supplier VAT ID  

\* Invoice-From Address Deloitte Consulting Pty Ltd   
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa


\* Remit-To Address Deloitte Consulting Pty Ltd   
5 Magwa Crescent  
Waterfall City  
1687  
South Africa

Bank Name: Standard Bank

Beneficiary Name: Deloitte Consulting Pty Ltd

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# How to Create Invoices From a Contract

You can create an invoice directly from a contract.

## Process Steps:

**7 Bill to Address**  
Select EDFR Bill-to address

**8 Buyer VAT IDVAT**  
Select EDFR VAT in the drop down

**Ship to Address**  
Select the EDFR ship to address

**9 Requester Email**  
Populate the email address of the contract manager/requestor

**Requester Name**  
Populate the name and surname of the contract manager/requestor

The screenshot shows the 'Draft' status of an invoice creation process. The contract is 'TEST UAT \_ SLA'. The 'Remit-To Address' and 'Ship-From Address' are both 'UATsupplier1' at '196 Rus St, Kuils River, Western Cape, 7582, South Africa'. The 'To' field is set to 'Customer: EDF Renewables (Pty) Ltd'. A blue box highlights the 'To' section with numbered callouts: 7 points to the 'Customer' field, 8 points to the 'Ship to Address' field (which is currently 'No address selected'), and 9 points to the 'Requester Email' and 'Requester Name' fields (both currently empty). Other fields include 'Image Scan' (Choose File), 'Supplier Note' (empty text area), and 'Attachments' (Add File | URL | Text).

# How to Create Invoices From a Contract

You can create an invoice directly from a contract.

## Process Steps:

- 10 Qty**  
Populate the quantity you are invoicing for.  
**\*You can partially invoice**
- 11 Price**  
The price you are invoicing for.
- 12 VAT rate**  
Populate the VAT rate of the goods/services
- 13**  
**Delete** : Deletes the invoice.  
**Cancel** : Cancels the edit page of the invoice  
**Save as draft** : Saves the invoice as a draft.  
**Calculate** : calculates the total amount / value of the invoice.  
Click on 'Calculate' for the total including VAT.
- 14 Submit**  
Submits the invoice to EDFR .

The screenshot displays the 'Lines' section of the Coupa system. It features two line items and a bottom navigation bar. Callout 10 points to the 'Qty' field of the first line item, which is '10'. Callout 11 points to the 'Price' field of the second line item, which is '100,000.00'. Callout 12 points to the 'VAT Rate' dropdown menu in the 'Taxes' section. Callout 13 points to the 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit' buttons at the bottom. Callout 14 points to the 'Submit' button.

Type	Description	Qty	UOM	Price
	Cleaning chemicals	10	Each	5,000.00
	Coupa services			100,000.00

PO Line: EDF000104-1  
Service/Time Sheet Line: None  
Contract: Testing Contract template 1 (P)  
Supplier part number:

Billing: PI-Inside RSA

Taxes:  
VAT Rate:   
VAT Amount: 0.00  
Tax Reference:

+ Add Line + Pick lines from Contract

Total Taxes:

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit

# 04

## How to Partially Invoice on the CSP



# How to Partially Invoice on the CSP

Coupa allows for partial invoicing.

## Process Steps:

- 1 On the CSP click on 'Orders'.
- 2 Find the PO you want to create an invoice for and click on the gold stack of coins to create an invoice
- 3 For service purchase orders populate the partial amount for services rendered in "Price" e.g., PO value is R10 000, but you are invoicing for services worth R5000
- 4 For goods purchase orders populate the partial quantity for goods delivered in "Qty" e.g., PO quantity is 20 chairs , but you are invoicing for 10 chairs delivered

**coupa supplier portal** | DELOITTE | NOTIFICATIONS 20 | HELP

Home | Profile | Forecasts | **Orders** | Service/Time Sheets | ASN | Invoices | Catalogues | Business Performance | Sourcing

Add-ons | Setup

Orders | Order lines | Returns | Order Changes | Order Line Changes | Order Confirmations | Order Confirmation Lines | Promised Deliveries | Deliveries

### Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to:  View: All Search:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000016	20/10/2023	Issued	20/10/2023	Implementation	No	1,900,000.00 ZAR		
EDF000015	19/10/2023	Issued	None	Profession accounting services	No	100,000.00 ZAR		

### Lines

Type	Description	Price
	Profession accounting s	0.00

PO Line: EDF000020-1 | Service/Time Sheet Line: None | Contract: Agreement1 (Published) | Credit Line: None

Type	Description	Qty	UOM	Price
	Office Chair	0	Each	100.00

05

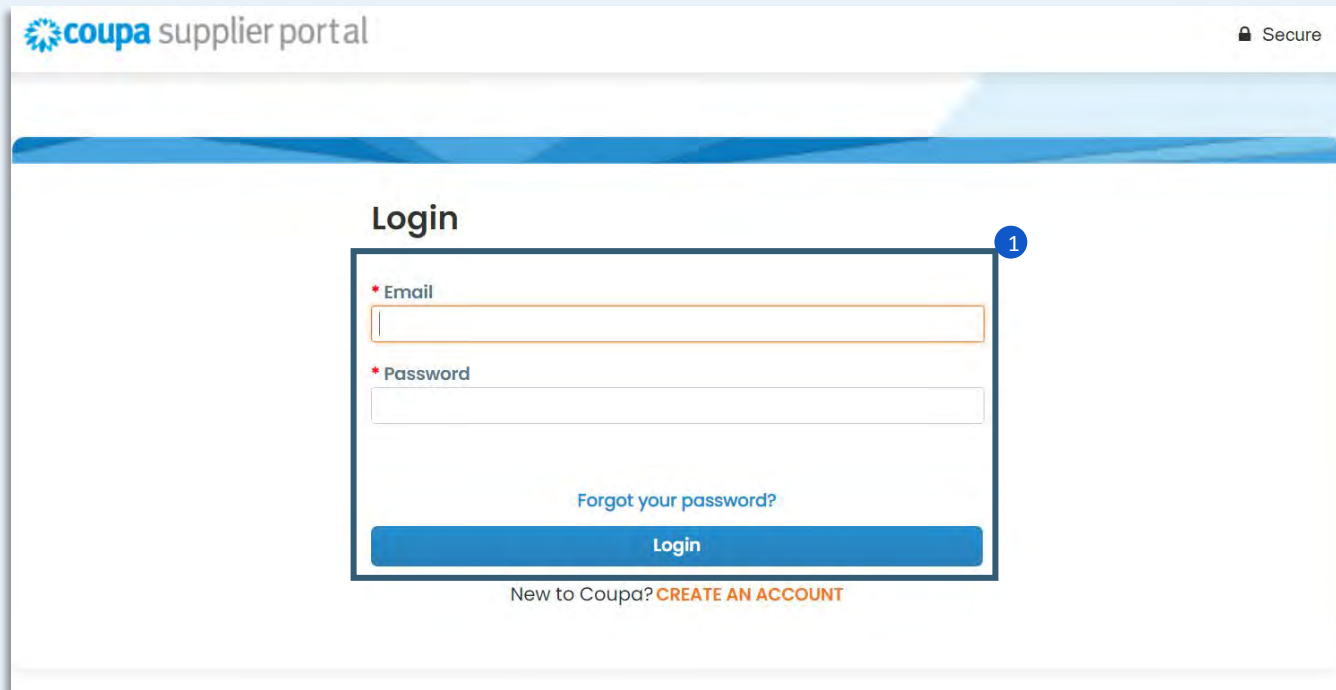
## How to Create Credit Notes

# How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

## Process Steps:

- 1 Log into the CSP by populating your CSP credentials and click on 'Login' to access the portal.



The screenshot shows the Coupa Supplier Portal login interface. At the top, the header reads "coupa supplier portal" with the Coupa logo on the left and a "Secure" indicator with a lock icon on the right. The main content area features a "Login" section. This section contains two input fields: "Email" and "Password", both marked with a red asterisk. Below these fields is a link that says "Forgot your password?". A blue "Login" button is positioned at the bottom of the login form. A blue circle with the number "1" is placed to the right of the login form, indicating the first step in the process. Below the login form, there is a link that says "New to Coupa? CREATE AN ACCOUNT".

# How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

## Process Steps:

2 Navigate to the Orders tab. Under the listed '**Purchase Orders**' identify the PO that you would like to create a credit note for.

3 Click on the **Red Coins** to create a credit note. This will bring up the Credit Note page which you can populate and submit.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Forecasts, Orders (highlighted with a blue box and a '2' in a circle), Service/Time Sheets, ASN, Invoices, Catalogues, and Business Performance. Below this, there are sub-tabs for Sourcing, Add-ons, and Setup. The main content area is titled 'Purchase Orders' and shows a list of orders. The first order, EDF000104, is highlighted. In the 'Actions' column for this order, there is a red coin icon, which is highlighted with a blue box and a '3' in a circle. The second order, EDF000079, is also visible below it.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		
EDF000079	19/11/2023	Issued	None	Price Variance 10	No	0.51 EUR		

# How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

## Process Steps:

4 A credit note pop-up will be displayed. Click on the **drop-down** and select the invoice you are creating a credit note for.

5 Select the applicable option:

**Completely cancel the invoice with a credit note:**

Use this option to fix any inaccuracies with the invoices by **cancelling** the incorrect invoice.

**Adjust invoice with a credit note:**

Only quantity and price can be reduced through **partial** credit notes.

6 Click on **"Create"** to create the credit note

**Credit Note**

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)

Invoice76009

Cancel Continue

**Credit Note**

How do you want to correct invoice "Invoice76000" ?

☒ Completely cancel the invoice with a credit note *i*

☐ Adjust invoice with a credit note *i*

Cancel Create



# How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

## Process Steps:

7

### Credit Note

Populate the credit note number as per your finance system.

8

### Credit Note Date

Reflects the date on which the credit note was created.

9

### Credit Reason

The reason for creating the credit note.

## Create Credit Note Create

This credit note applies to invoice [Testing Approval of Non PO invoice](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

### General Info

7

\* Credit Note #

8

\* Credit Note Date 19/02/2024

Payment Term 7 days

Original Date of Supply 18/10/2023

\* Currency ZAR

Delivery Number

Status Draft

Original Invoice Testing Approval of Non PO invoice  
Number

Original Invoice Date 18/10/2023

Image Scan [Choose File](#) No file chosen

Supplier Note

9

Attachments [Add File](#) | [URL](#) | [Text](#)

\* Credit Reason

### From

\* Supplier Deloitte & Touche

\* Supplier VAT ID 4999999999

\* Invoice-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Waterfall City  
Johannesburg  
2090  
South Africa

\* Remit-To Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Midrand  
Gauteng  
2066  
South Africa

\* Ship-From Address Deloitte Consulting Pty Ltd  
5 Magwa Crescent  
Midrand  
Gauteng  
2066  
South Africa

### To

Customer EDF Renewables (Pty) Ltd

# How to Create a Credit Note

To create a credit note against a submitted invoice you need to access your CSP and follow the steps:

## Process Steps:

- 1 Quantity and price will be displayed in red negative values for credit notes
- 1 Click on "Submit" to submit the credit note to EDFR
- 2 Credit notes will be displayed on the invoices tab with red negative values

Lines

Adjustment Type Quantity

Type	Description	Qty	UOM	Price
Qty	Testing	-1.0	Box	1,000.00

-1,000.00

Adjustment Type Price

Type	Description	Qty	UOM	Price
Qty	Testing	1.000	Box	-1,000.00

-1,000.00

Invoices

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)

Create Invoices

Create Invoice from PO Create Invoice from Contract Create Manual Invoice Create Credit Note

Export to View Credit notes Search

Invoice #	Invoice Date	Original Invoice Number	Gross Total	Comments	Actions
CRN2967	20/10/2023	Inv2967	-5,750.00 ZAR		
Credit note play back 2-1	20/10/2023	test play back -1-2	-11,500.00 ZAR		
Test123	19/10/2023	Invoice7600	100,000.00 ZAR		
CR7600	19/10/2023	Invoice7600	-1,150.00 ZAR		
Testing Approval	18/10/2023	Testing	-100.00 ZAR		
CN testing	18/10/2023	Voiding Invoice	-500.00 ZAR		
CN Testing	18/10/2023	Voiding Invoice	-1,000.00 ZAR		

Per page 15 | 45 | 90

Total Taxes

Lines Net Total	-1,000.00
Lines VAT Totals	-0.00

Shipping

Handling

Misc

Total VAT 0.00

Net Total -1,000.00

Gross Total -1,000.00

Delete Cancel Save as draft Calculate Submit

# 06

## How to Resolve Disputed Invoice

# How to Resolve a Disputed Invoice


If the invoice is incorrectly captured e.g. Invoice lines are different from PO lines or supplier has over invoiced EDFR will Dispute the invoice prompting, you to resolve the dispute.


## Navigation:

1 You will receive an email notifying you that your invoice has been disputed and the reason for the dispute .

***\*You will also be notified of a dispute on the CSP notifications***

2 Click 'Log in Now' to login to the Coupa Supplier Portal and view the invoice being disputed.

Powered by 

 EDF Renewables

Invoice #Test0001 has been marked as Disputed by EDF Renewables (Pty) Ltd

1 Hi

Your Invoice Test0001 has been marked as disputed by your customer, EDF Renewables (Pty) Ltd .

Dispute Reason(s)


- Price different from PO/Contract or Catalog

Date: 2023-10-20


Additional Comments: None

Please review the Invoice that you've submitted as it has been disputed by EDF Renewables (Pty) Ltd . After you've corrected the reasons for the dispute, you can submit a new Invoice for approval.


Manage your invoices and more with Coupa




Insight



Opportunity



Collaboration

2 

[Learn more about Coupa](#)

# How to Resolve a Disputed Invoice

Once you have accessed the invoices tab on the CSP follow the below steps to resolve the dispute:

## Navigation:

- 3 Navigate to "Invoices" once you have logged in to CSP
- 4 The status of the invoice will be 'Disputed'. You can filter for all your Disputed invoices by changing the View to reflect all Disputed Invoices.
- 5 Click on 'Resolve', under 'Actions' to resolve the disputed invoice.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'DELOITTE', 'NOTIFICATIONS 22', and 'HELP' are on the right. A navigation bar contains links: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, **Invoices** (highlighted with a blue box and a '3' in a circle), Catalogues, and Business Performance. Below this is a sub-navigation bar with 'Invoices' (highlighted), 'Invoices Lines', and 'Payment Receipts'. A 'Select Customer' dropdown menu shows 'EDF Renewables (Pty) Ltd'. The main heading is 'Invoices'. Below it, 'Instructions From Customer' states: '{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}'. There are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. Below these is an 'Export to' dropdown. A 'View' dropdown is set to 'Disputed' (highlighted with a blue box and a '4' in a circle). A search bar is to the right. A table of invoices is displayed with columns: Invoice #, Invoice Date, PO #, Gross Total, Disputed Date, Commented, Dispute reason, Comments, and Actions. The first row is 'Test invoice -CSP' with a date of 06/11/2023 and a gross total of 0.00 ZAR. The second row is 'Test0001' with a date of 20/10/2023 and a gross total of 100,000.00 ZAR. The 'Dispute reason' for the second row is 'Price different from PO/Contract or Catalog' (highlighted with a blue box and a '5' in a circle). The 'Actions' column for the second row has a 'Resolve' button (highlighted with a blue box and a '5' in a circle).

Invoice #	Invoice Date	PO #	Gross Total	Disputed Date	Commented	Dispute reason	Comments	Actions
Test invoice -CSP	06/11/2023	None	0.00 ZAR	07/11/2023	None	Tax rate missing or incorrect		
Test0001	20/10/2023	EDF000019	100,000.00 ZAR	20/10/2023	None	Price different from PO/Contract or Catalog		Resolve



# How to Resolve a Disputed Invoice

There are 2 options to resolve a disputed invoice.

## Navigation:

- 6 Review the applicable resolution for the disputed invoice
- 7 The 'Correct Invoice' option allows you to adjust the invoice e.g. edit the Qty and Amount.

Select Customer

EDF Renewables (Pty) Ltd

Invoice #Test0001 [Back](#)

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Please review the invoice and determine the resolution option:

Void

If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

Correct Invoice

If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

Total Taxes

Lines Net Total	100,000.00	
Lines VAT Totals	0.00	
Shipping		0.00
Handling		0.00
Misc		0.00
Total VAT		0.00
Net Total		100,000.00
Gross Total		100,000.00

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Correct Invoice



Thank You!