



The Financial Times

**Coupa Supplier Portal
User Guide**

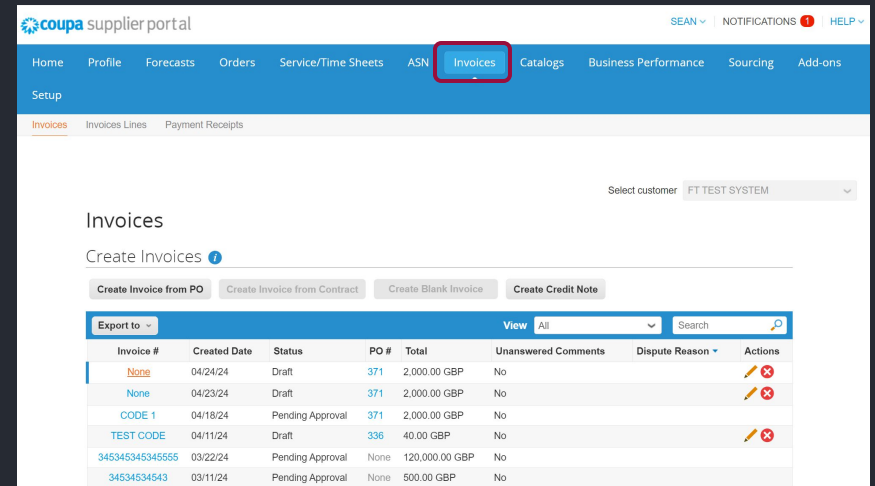


Credit Notes







Submitting Credit Notes in the CSP

Step 1:

In the CSP, navigate to the **Invoices** tab from the top toolbar. Ensure you have selected 'FT Group' as your customer group.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted with a red box), 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this, there are sub-tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. A dropdown menu for 'Select customer' is set to 'FT TEST SYSTEM'. The main heading is 'Invoices', followed by a 'Create Invoices' button. Below that are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is displayed with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/24/24	Draft	371	2,000.00 GBP	No		 
None	04/23/24	Draft	371	2,000.00 GBP	No		 
CODE 1	04/18/24	Pending Approval	371	2,000.00 GBP	No		
TEST CODE	04/11/24	Draft	336	40.00 GBP	No		 
345345345345555	03/22/24	Pending Approval	None	120,000.00 GBP	No		
34534534543	03/11/24	Pending Approval	None	500.00 GBP	No		

Submitting Credit Notes in the CSP

Step 2:

1: Select **Create Credit Note**, which will open up a pop up window.

2: Select **Resolve issue for invoice number** and then search or select the invoice number you want to raise a credit note for.

3: Once you have found the invoice you want to create a credit note for, select **Continue**.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Invoices' section is active, showing a table of invoices. A red box labeled '1' highlights the 'Create Credit Note' button in the 'Create Invoices' section. Below the table, a 'Credit Note' pop-up window is open, with a red box labeled '2' highlighting the 'Reason' dropdown menu. The dropdown menu is set to 'Resolve issue for invoice number'. A red box labeled '3' highlights the 'Continue' button at the bottom right of the pop-up window.

Table 1: Invoices

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	04/24/24	Draft	371	2,000.00 GBP	No		
None	04/23/24	Draft	371	2,000.00 GBP	No		

Table 2: Credit Note Pop-up

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)

Submitting Credit Notes in the CSP

Step 3:

The next pop up window will ask if you want to cancel the invoice or adjust the invoice with a credit note. Once you have selected the options you want to complete, select **Create**.

Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reas
04/24/24	Draft	371	2,000.00 GBP	No	
04/23/24	Draft	371	2,000.00 GBP	No	
04/18/24					
04/11/24					
03/22/24					
03/11/24					
02/20/24					
10/04/23					
09/11/23	Draft	332	30.00 GBP	No	
09/11/23	Draft	331	240.00 GBP	No	

Credit Note [X]

How do you want to correct invoice "CODE 1" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel **Create**

Submitting Credit Notes in the CSP

Step 4:

The Create Credit Note screen is now displayed.

1: In the General Info section, the mandatory fields to complete are Credit Note #, Credit Note Date and Credit Reason.

2: Ensure the Buyer VAT ID is correct.

Create Credit Note Create

This credit note applies to invoice CODE 1. When approved, the credit will adjust the invoice's impact to the transaction.

General Info

* Credit Note #

* Credit Note Date 04/24/24

Payment Term EOM 30

Original Date of Supply 04/18/24

* Currency GBP

Delivery Number

Status Draft

Original Invoice # CODE 1

Original Invoice Date 04/18/24

Image Scan No file chosen

Supplier Note

Attachments Add File | URL | Text

Cash Accounting Scheme

* Credit Reason

Margin Scheme

From

* Supplier FT TEST SUPPLIER

* Supplier VAT ID GB867586757

* Invoice From Address TEST UK
2
the strand
SS5 5JH
United Kingdom
LTD

* Remit-To Address TEST UK
2

This credit note applies to invoice CODE 1. When approved, the credit will adjust the invoice's impact to the transaction.

General Info

Credit Note Number None

Credit Note Date 04/24/24

Payment Term EOM 30

Original Date of Supply None

Currency GBP

Delivery Number None

Status Draft

Shipping Term None

Original Invoice # CODE 1

Original Invoice Date 04/18/24

Credit Note PDF None
Document

Image Scan None

Supplier Notes None

Attachments None

Bill To & Ship To

Supplier FT TEST SUPPLIER

Invoice From TEST UK
2
the strand
SS5 5JH
United Kingdom

Type of Company LTD

Remit To TEST UK
2
the strand
SS5 5JH
United Kingdom

Ship From TEST UK
2
the strand
SS5 5JH
United Kingdom

Supplier VAT ID GB867586757

Customer FT TEST SYSTEM

Bill To Address 37 Upgrade street
San Mateo, 91111
United States

Ship To Address JA TEST
JA TEST
United Kingdom

* Buyer VAT ID GB226142332

Cash Accounting None
Scheme

Credit Reason None

Margin Scheme None

Submitting Credit Notes in the CSP

Step 5:

Scroll down to the complete the Lines section. The credit note has brought through lines from the invoice and created a credit note.

1: Check that the **Total VAT**, **Net Total** and **Gross Total** details are correct. If all is correct, select **Submit**.

2: A pop up window will confirm if you are ready to send, you can **Continue Editing** or select **Send Credit Note** to complete.

Adjustment Type	Quantity				
Type	Description	Qty	UOM	Price	-2,000.00
engager		-1.0	Each	2,000.00	

PO Line	Service/Time Sheet Line	Contract	Supplier Part Number
371-1	None		

UNSPSC	Billing Note	Billing
		129958-AAK040-0-CP0009

VAT Rate	VAT Amount	Tax Reference
Exempt	0.00	N/A

Totals & Taxes	
Lines Net Total	-2,000.00
Lines VAT Totals	0.00
Total VAT	0.00
Net Total	-2,000.00
Gross Total	-2,000.00

Are You Ready to Send?

Coupa is about to create a credit note on your behalf. Please make sure you are not attaching another credit note to this transaction as the Coupa generated PDF is your and your customer's legal credit note.

Continue Editing Send Credit Note

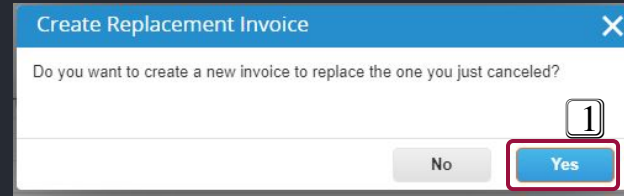
Submitting Credit Notes in the CSP

Step 6:

You will proceed to the **Create Replacement Invoice** pop up window with the option to create a replacement invoice.

1: By selecting **Yes**, you will be taken to the invoice creation screen. Follow the instructions on *How to Submit Invoices in the CSP*.

2: If you select **No** you are taken back to the invoices screen. You will see the credit note you have created appears at the top of the list.



Invoices

Invoice deleted

Create Invoices

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

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CODE 1	04/24/24	Pending Approval	371	-2,000.00 GBP	No		
CODE 1	04/18/24	Pending Approval	371	2,000.00 GBP	No		
TEST CODE	04/11/24	Draft	336	40.00 GBP	No		
345345345345555	03/22/24	Pending Approval	None	120,000.00 GBP	No		
34534534543	03/11/24	Pending Approval	None	500.00 GBP	No		
123123123	02/20/24	Approved	339	25,000.00 GBP	No		
tes tax	10/04/23	Pending Approval	None	1,200.00 GBP	No		
reery	09/11/23	Draft	332	30.00 GBP	No		
1718	09/11/23	Draft	331	240.00 GBP	No		
345345345345	09/23/23	Pending Approval	None	100.00 GBP	No		
1135	07/26/23	Approved	322	6,000.00 GBP	No		
1113	07/26/23	Approved	320	1,200.00 GBP	No		
None	07/18/23	Draft	320	19,750.00 GBP	No		
None	07/18/23	Draft	320	19,750.00 GBP	No		
wrong code test	07/18/23	Approved	320	105.00 GBP	No		

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Further help and support

If you are unable to find answers to your questions within these guides you can refer to:

- [FT Supplier Webpage](https://aboutus.ft.com/suppliers), which includes FAQs and other supporting information: aboutus.ft.com/suppliers
- You can contact our Procure-to-Pay Operations team at p2p@ft.com

Or if you require technical assistance with Coupa you can refer to:

- [Coupa Supplier Help Centre](#)
- [Coupa Compass](#) - Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the '[Getting started with the CSP](#)' guide from Coupa
- From the [CSP homepage](#) you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

Glossary of Terms

CSP	Coupa Supplier Portal
Admin	The person with Administration rights for the Coupa Supplier Portal for your account
Financial Times business contact	The Financial Times employee you have been discussing supply of goods and/or services
PO	Purchase Order
Users	Your employees who have access to the Coupa Supplier Portal
Invitation	There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date>. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.
Coupa Compass	This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help
Supplier Information Form	This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP