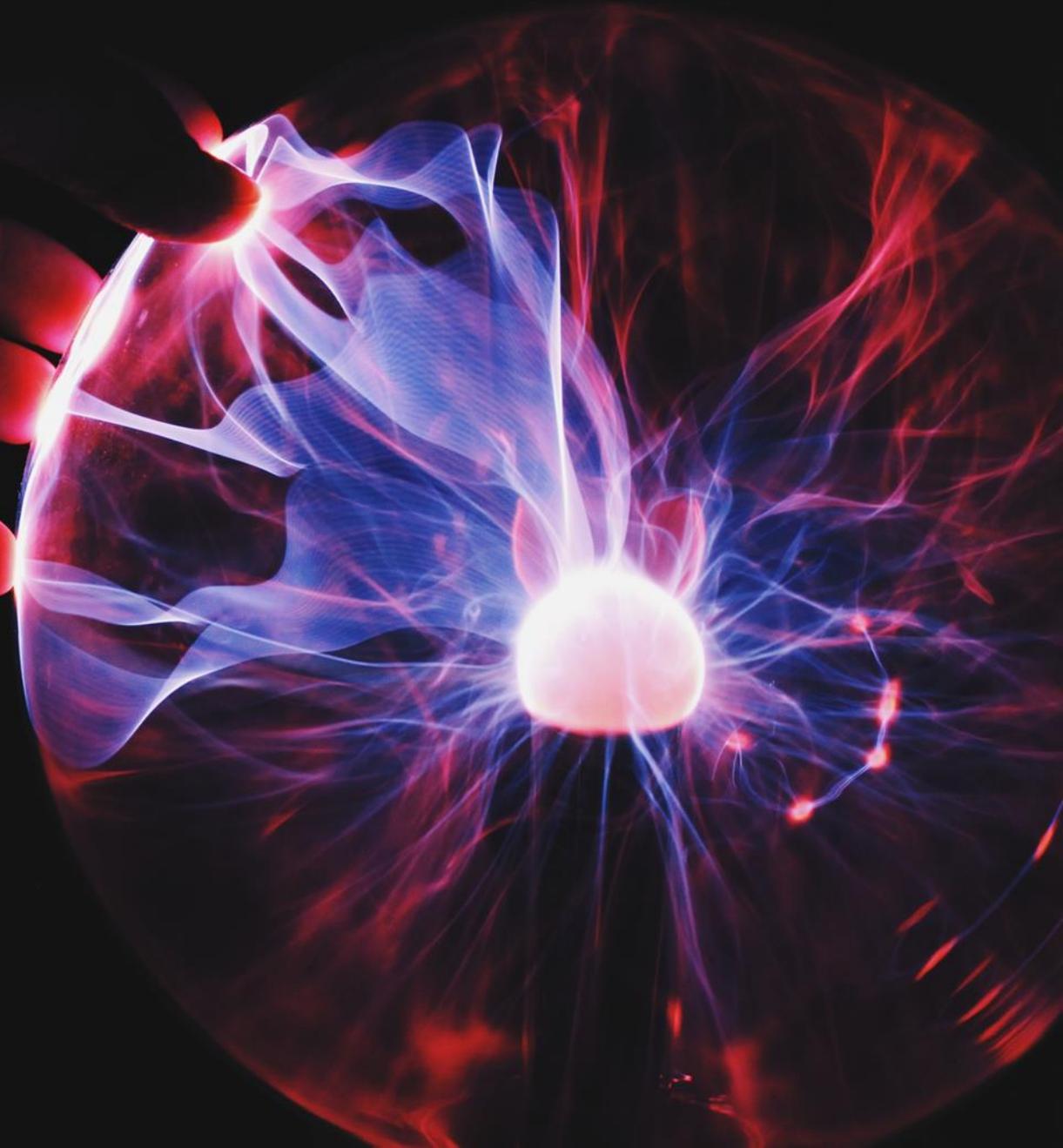


# KANTAR

Coupa Supplier Portal (CSP)  
Training  
**PO Viewing, Invoices &  
Credit Notes Creation**



# Agenda

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# 1. Viewing and Acknowledging a PO



# Viewing a Purchase Order

When Kantar issues a Purchase Order (PO), you will receive **Notification** in the Coupa Supplier Portal (CSP). You will be able to view the PO directly in the CSP under the **Orders** section.

The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the header, there are links for "US SUPPLIER" with a dropdown arrow, "NOTIFICATIONS" with a red circle containing the number "1", and "HELP" with a dropdown arrow. Below the header is a blue navigation bar with several menu items: "Home", "Profile", "Orders" (which is highlighted with a red box), "Service/Time Sheets", "ASN", "Invoices", "Catalogues", and "Business Performance". A notification box is overlaid on the right side of the navigation bar, containing the text "New PO received" and "New PO 106000407 for \$100.00 issued by Kantar.", along with a close button (X) and a link "See all Notifications". Below the navigation bar, there is a "New" announcement: "New: Exclusive discounts for your business to thank you for being a part of the Coupa Community." Below that is a "Recommended" section: "Recommended: Complete your profile to get paid faster and get discovered Learn More". On the right side of the main content area, there is an "Announcements" section with a link "View All (0)".

# Viewing a Purchase Order

If you enable email notification for POs, you will receive an **email notification** for the new PO.

Open the email and click **View Order**. This will open the CSP - where you can view the PO.

Kantar New PO - Kantar Purchase Order #106000407 Powered by Coupa Software Hi US Supplier, You have received a new purch...

---

New PO Inbox x

 **Kantar** <do\_not\_reply@kantar-dev.coupahost.com>  
to me ▾

**KANTAR** Kantar Purchase Order #106000407

---

Powered by  **coupa**

Hi US Supplier,  
You have received a new purchase order #106000407 from Kantar Company.

Submitted By Elsa Robinson  
Supplier US Supplier Webinar  
Total **100.00 USD**

Items	<b>US Supplier Webinar Demo</b>	1.0 DAY X 100.00	<b>100.00 USD</b>
-------	---------------------------------	------------------	-------------------

[View Order](#)

# Viewing a Purchase Order

1. **Status:** The status of the PO.
2. **Order Date:** The date that the PO was created.
3. **Revision Date:** Date the PO was revised. If the PO does not have any revisions this will be the same as the Order Date.
4. **Requester:** The name of the Requester.
5. **Email:** The E-mail address of the Requester.
6. **Payment Term:** Payment term.
7. **Attachments:** Attachment from the Requester.
8. **Acknowledge:** Tick to acknowledge you can fulfil the purchase order on time
9. **Shipping:** The ship-to address
10. **Terms:** Shipping term
11. **Shipment Tracking:** Allows you to create shipment tracker for this order

## Purchase Order #106000407

### General Info

**Status** Issued - Sent via Email  
**Order Date** 26/05/2022  
**Revision Date** 26/05/2022  
**Requester** Elsa Robinson  
**Email** Elsa.Robinson@kpmg.co.uk  
**Payment Term** 60 DAYS, EOM  
**Attachments** None  
**Acknowledged**

### Shipping

**Ship-To Address** 3630 Peachtree Road  
ATLANTA, 30326  
United States  
Attn: Elsa Robinson

**Terms** Standard

### Shipment Tracking



No delivery tracking.

# Viewing a Purchase Order- Shipping Tracking

If you wish to provide shipping information for this entire PO, click on the **Add** button at the Shipment Tracking section. Then enter **Tracking Number** and select a **Carrier** from the drop down list.

Click **Save**.

## Shipping

---

**Ship-To Address** 3630 Peachtree Road  
ATLANTA, 30326  
United States  
Attn: Elsa Robinson

**Terms** Standard

### Shipment Tracking

---

No delivery tracking.



### Create Shipment Tracker

Enter tracking number for entire PO. To ship PO partially, create ASN.

\* Tracking Number

\* Carrier

Note  
USPS  
UPS  
DHL  
OnTrac  
Stamps.Com  
Asendia

Terms None

### Shipment Tracking (1)

 Add

**FedEx** FX123456  

Status Unknown



# Viewing a Purchase Order

12. **Lines:** Line-level information for each PO.

13. **Print View:** Allows you to view the print view of the PO.

14. **Create Invoice:** Allows you to flip the PO to an invoice.

15. **Add Comment:** Allows you to add comments to Kantar.

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		US Supplier Webinar Demo	1	DAY	100.00	100.00	0.00

\* Need By 29/05/2022 Counterparty Code None

Per page 15 | 45 | 90

Total USD 100.00

Create Invoice Save Print View

Comments Mute Comments

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

Add Comment

# Viewing a Purchase Order – Print view

Clicking on **Print View** will allow you to view a print friendly version of the PO - which will also include terms and conditions at the bottom.

<b>* Need By</b>	<b>Counterparty Code</b>
29/05/2022	None

Per page 15 | 45 | 90

Total USD **100.00**

[Create Invoice](#) [Save](#) [Print View](#)

**KANTAR**  
DEV

**Kantar Consulting LLC**  
**PURCHASE ORDER**

PO NUMBER: 106000407  
DATE: 26/05/2022  
PAYMENT TERMS: 60 DAYS, EOM  
SHIPPING TERMS: Standard  
CURRENCY: USD  
CONTRACT: 692  
CONTACT: Elsa Robinson  
Elsa.Robinson@kpmg.co.uk

**US Supplier Webinar**  
Attn: US Supplier Webinar  
ussupplierwebinar@gmail.com

**Ship To**  
Kantar Consulting LLC  
3630 Peachtree Road  
ATLANTA, 30326  
United States  
Attn: Elsa Robinson

**Bill To**  
Kantar Consulting LLC  
3, World Trade Center,  
175 Greenwich St,  
NEW YORK, 10007  
United States  
Attn: Elsa Robinson

Line	Description	Need By Date	Qty	Unit	Price	Total
1	US Supplier Webinar Demo	29/05/2022	1	DAY	100.00	100.00

By fulfilling the Purchase order, you agree to comply with Kantar PO terms of conditions available on the link : <https://www.kantar.com/uki/supplier-onboarding-and-risk-assessment>

Counterparty Code: 1010101

# Viewing a Purchase Order – History

At the bottom of the PO, there is History. Expand it and you can see records all the historical activities of the PO.

 History 

---

Automatically updated on 26/05/2022 at 10:11  
Purchase order 106000407 version 1 sent via email. [View PO](#)

---

Kantar Consulting LLC User on 26/05/2022 at 10:11

---

Kantar Consulting LLC User On 26/05/2022 at 10:11  
Purchase order 106000407 Created

# Acknowledging a PO – Adding Comments

To add a comment for Kantar, enter your comment in the **Comments box** at the bottom of your PO and then click **Add Comment**.

When Kantar responds, you will receive a **Notification** in your mailbox and CSP. You will also be able to see their response here. All comments entered here will be viewable to Kantar.



The screenshot shows a web interface for adding comments. At the top, there is a header with a speech bubble icon containing the number '0', the word 'Comments', and a 'Mute Comments' link with a dropdown arrow. Below the header is a large text input field labeled 'Enter Comment'. Underneath the input field is a smaller line of text: 'Send comment notification to a user by typing @name (ex. @JohnSmith)'. Below that is an 'Attachments' section with links for 'Add File' and 'URL'. At the bottom right of the form is a grey 'Add Comment' button.

# Acknowledging a PO

To acknowledge the PO, click the Acknowledged checkbox.

## Purchase Order #106000407

### General Info

**Status** Issued - Sent via Email

**Order Date** 26/05/2022

**Revision Date** 26/05/2022

**Requester** Elsa Robinson

**Email** Elsa.Robinson@kpmg.co.uk

**Payment Term** 60 DAYS, EOM

**Attachments** None

**Acknowledged**

# Viewing a Purchase Order – From CSP

You can also view all your Purchase Orders from CSP directly.

1. Go to your CSP account, and click on **Orders** at the top
2. Select **Kantar** from the **Select Customer** drop down
3. On top of all the POs, there is instruction from Kantar at the **Instructions From Customer** field
4. Click on the **PO number** that you wish to view

The screenshot displays the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, **Orders**, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. Below this is a sub-navigation bar with: Orders, Order lines, Returns, Order Changes, Order Line Changes, and Deliveries. On the right side, there is a 'Select Customer' dropdown menu with 'Kantar' selected, and a 'Configure PO Delivery' button. The main heading is 'Purchase Orders'. Below this, there is an 'Instructions From Customer' section with the text: 'Instructions For any queries not responded to by the requestor of the invoice, please comment @AP in the chat or send an email to xxxx@servicenow.com'. A button with a bell icon and the text 'Click the Action to Invoice from a Purchase Order' is also present. Below the instructions is a table with the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains five rows of data, with the first row highlighted in blue. The PO numbers 106000431, 191000430, 106000421, 191000420, and 106000419 are highlighted with a red box.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
106000431	01/06/2022	Issued	None	2 DAY of US Supplier Webinar Demo	No	200.00 USD		
191000430	01/06/2022	Issued	None	1 DAY of US Supplier Webinar Demo	No	100.00 USD		
106000421	30/05/2022	Issued	None	2 DAY of US Supplier Webinar Demo	No	200.00 USD		
191000420	30/05/2022	Issued	None	1 DAY of US Supplier Webinar Demo	No	100.00 USD		
106000419	30/05/2022	Issued	None	2 DAY of US Supplier Webinar Demo	No	200.00 USD		

## 2. Flipping a PO into an Invoice



# Creating invoices: Flipping a PO into an Invoice

1. Click on the **Orders** tab.
2. Search for the purchase order to be invoiced and click on the **Gold Coin Stack icon** to create the invoice.

The screenshot shows the Coupa Supplier Portal interface. The 'Orders' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and a 'Select Customer' dropdown menu set to 'Kantar'. The main content area is titled 'Purchase Orders' and includes 'Instructions From Customer'. Below the instructions, there is a table of purchase orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row is highlighted, and a tooltip is visible over the 'Gold Coin Stack' icon in the 'Actions' column, indicating the option to 'Create invoice for PO #106000421'.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
106000421	30/05/2022	Issued	None	2 DAY of US Supplier Webinar Demo	No	200.00	USD	
191000420	30/05/2022	Issued	None	1 DAY of US Supplier Webinar Demo	No	USD		
106000419	30/05/2022	Issued	None	2 DAY of US Supplier Webinar	No	200.00		

# Creating invoices: Flipping a PO into an Invoice

3. Complete header level fields. **Please ensure that the information used to generate the invoice from Coupa is the same data from your own ERP system.**

**Invoice #:** Enter the invoice number generated in your own ERP system.

**Invoice Date:** Set automatically at time of submission.

**Payment Terms:** The payment terms from the PO.

**Currency:** The currency from the PO. If the currency is different to your “home” currency an exchange rate box will appear. Please refer to **Section 8. Non-Home Currency Invoice**. **UK suppliers should also refer to Section 9.**

**Delivery Number:** Provide if applicable.

**Status:** Current status of this invoice.

**Legal Invoice Document :** Please do **NOT** attach a copy of an invoice from your system. As per the T&Cs agreed, Coupa will issue the legal invoices on your behalf.

**Supplier Note:** Enter any notes for Kantar.

**Attachments:** Attach supporting documentation; all types of attachments are supported. If requested by Kantar,

Please NOTE:

- For Coupa compliant e-invoicing countries, as per the T&Cs agreed, Coupa will issue the legal invoices on your behalf. Do NOT attach or issue to Kantar a copy of an invoice generated from your system. Please refer to section 6. Appendix for Coupa compliant e-invoicing country list
- For non Coupa e-compliant invoicing countries, it will be mandatory for you to attach a copy of an invoice generated from your system
- Coupa E-Invoicing is designed to enable compliance with regulatory requirements imposed on sending / receiving electronic invoices by the respective tax jurisdictions in the aforementioned supported countries.



## General Info

\* Invoice #

Invoice Date Set automatically at time of submission

Payment Term 60 DAYS, EOM

\* Currency USD

Delivery Number

Status Draft

Legal Invoice Document  No file chosen

Supplier Note

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

# Creating invoices: Flipping a PO into an Invoice

4. **Customer:** This will always default to Kantar

5. **Bill to Address:** The Bill To address from the PO. It will appear after you pick a Buyer Tax ID.

6. **Buyer VAT ID/ other tax ID:** Choose a Kantar Tax ID that is applicable for this transaction from the drop down. This section may not be available if invoicing from a non-UK country

7. **Ship To Address:** The Ship To address from the PO

## Please NOTE:

- Please refer to **section 6. Tax Guidance** on instructions of how to pick your Tax ID and Kantar Tax ID.
- You can add multiple **From** info in the **Legal Entity Setup** section under **Setup** and select these options by clicking the **search icon**.



**Customer** Kantar

\* **Bill-To Address** Kantar Consulting LLC  
3, World Trade Center,  
175 Greenwich St,  
NEW YORK, 10007  
United States

**Buyer VAT IDTax** 06-1341319 ▼

**Ship To Address** 105 SE Executive Drive  
BENTONVILLE, 72712  
United States

# Creating invoices: Flipping a PO into an Invoice

**Supplier:** Your company name.

**Supplier VAT ID/ other tax ID:** This field will be defaulted if you only have one Tax ID setup for this legal entity. If you have multiple Tax IDs, choose the Tax ID that you set up in the **Legal Entity Setup** section in **Setup**.

**Invoice From Address:** Choose the **Invoice From Address** that you set up in your **Legal Entity Setup** section in **Setup** for this invoice.

**Remit-To Address:** Choose the **Remit-To Address** that you set up in your **Legal Entity Setup** section in **Setup** for this invoice.

**Ship From Address:** Choose the **Ship From address** that you set up in your **Legal Entity Setup** section in **Setup** for this invoice.

 From

\* **Supplier** US Supplier Webinar

**Supplier Tax ID** 12345 

\* **Invoice-From Address** US Supplier Webinar   
123  
New York, 10001  
United States

\* **Remit-To Address** US Supplier Webinar   
123  
New York, 10001  
United States

\* **Ship-From Address** US Supplier Webinar   
123  
New York, 10001  
United States

**Please NOTE:** If you have multiple tax registrations, please ensure you choose the correct tax registration based on the Country you have supplied your goods or services. Coupa will have different invoicing rules based on the Country of the tax registration that you have selected for the invoice (and in line with tax law of that country).

If you have multiple **Ship From addresses** please ensure it is the correct address which relates to where the goods are shipped from for this specific transaction.

# Creating invoices: Flipping a PO into an Invoice

8. Complete line level information. Here you may edit the Quantity/Price if you are sending a partial invoice.

9. **Category:** Select **Goods** or **Services**

**Taxes:** Add a **Tax Rate** for each line level item. Tax rates available will be driven by your invoicing country.

**Tax Reference:** For zero rated and exempt transactions, Coupa will require you to enter a “relevant reference or any indication” for these items” to indicate why the supply is not subject to Tax.

**Please NOTE:** It is important the Tax rate is correct in terms of the supplies being made and the place of supply for tax purposes and the tax charged and invoice references on your invoice match entries you have made in your tax records.

Please refer to section 6. Tax Guidance on instructions of how to pick the correct Tax rates.

The screenshot shows the 'Lines' section of a software interface. At the top, there is a header 'Lines' with a hamburger menu icon. Below this is a table with columns: Type (shopping cart icon), Description (US Supplier Webinar Demo), Qty (2.00), UOM (DAY), Price (100.00), and a total of 200.00 with a red 'X' icon. Below the table, there are several sections: 'PO Line' (106000421-1 with a 'Clear' link), 'Contract' (US Supplier Webinar), and 'Supplier part number' (empty field). The 'Billing' section shows 'LV\_Test Parent-LV\_Test Child\_106'. The 'Taxes' section is a table with columns: Tax Description (dropdown), Tax Rate (0.000), Tax Amount (0.00), and Tax Reference (empty field). At the bottom, there are three green plus icons with labels: '+ Add Line', '+ Pick lines from PO', and '+ Pick lines from Contract', followed by 'Total Taxes'.

# Creating invoices: Flipping a PO into an Invoice

10. After completing the invoice lines. If applicable, add shipping and handling charges at the invoice summary. Assign tax rates to shipping and handling charges like you did for the invoice lines.

**Tax Reference:** For zero rated and exempt transactions, Coupa will require you to enter a “relevant reference or any indication” for these items to indicate why the supply is not subject to tax. See section 6 for more details on tax recommendations.

After completing all the invoice information, click **Calculate**. This will then work out the new total.

## Please Note:

You should **NOT** add a new line when creating the invoices, as this will cause failure in the auto-matching of the PO and the invoice, therefore put your invoice on hold and delay your payment. Where you are supplying items where different Tax rates are applicable to the same PO line, please split these onto multiple invoices.

### Total Taxes

Lines Net Total	200.00
Lines Tax Totals	40.00
<hr/>	
Shipping	<input type="text" value="10.00"/>
<hr/>	
Total Tax	40.00
Net Total	210.00
<b>Total</b>	<b>250.00</b>

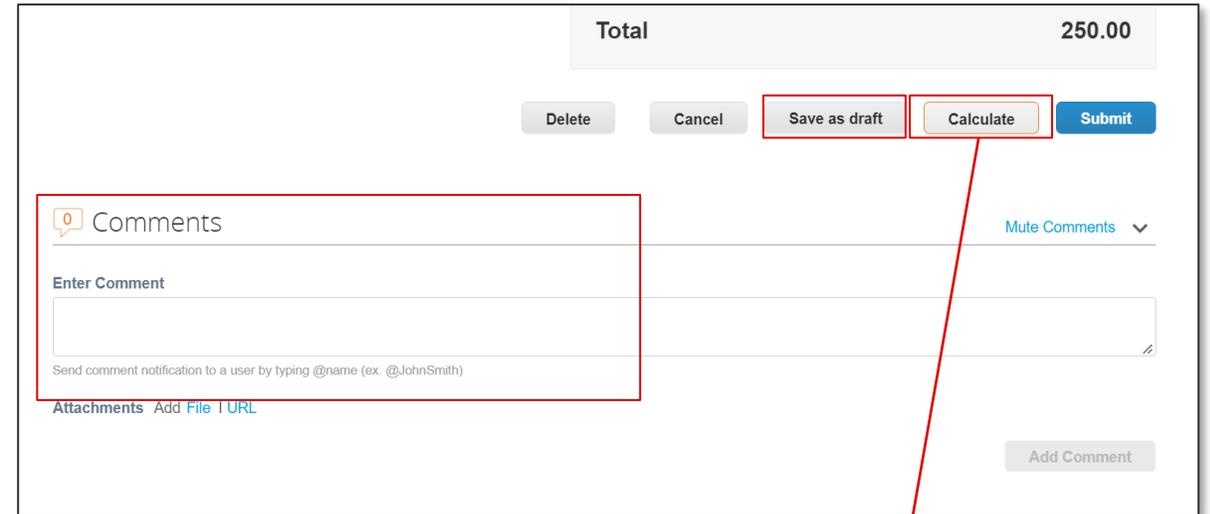
# Creating invoices: Flipping a PO into an Invoice

11. To add a comment for Kantar, enter your comment in the **Comments** box and then click on **Add Comment**.

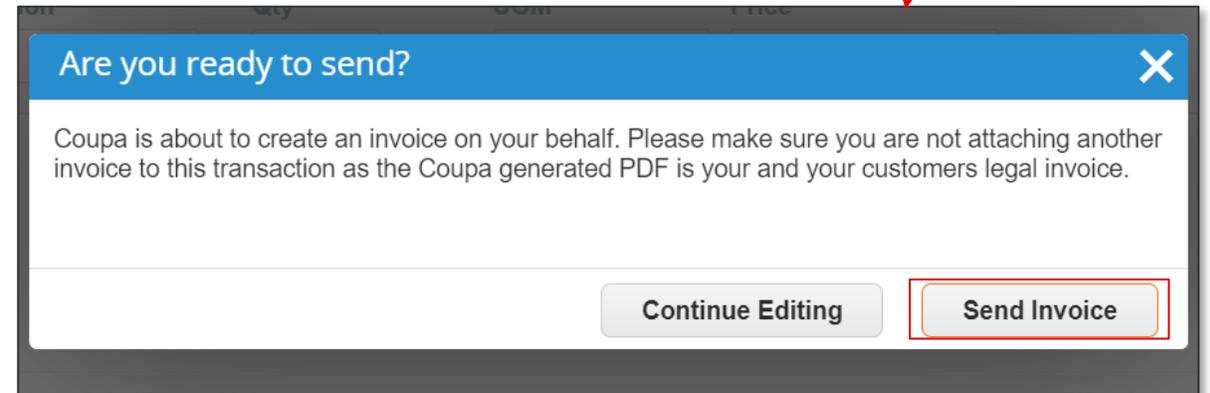
When Kantar responds, you will receive a notification and will also be able to see their response here.

All comments entered will be viewable to Kantar. The comment function for invoices is the same as it for PO.

If you want to save the invoice for later, click **Save as draft**. If you are ready to submit the invoice, click **Submit** and then click **Send Invoice** in the pop-up confirmation window.

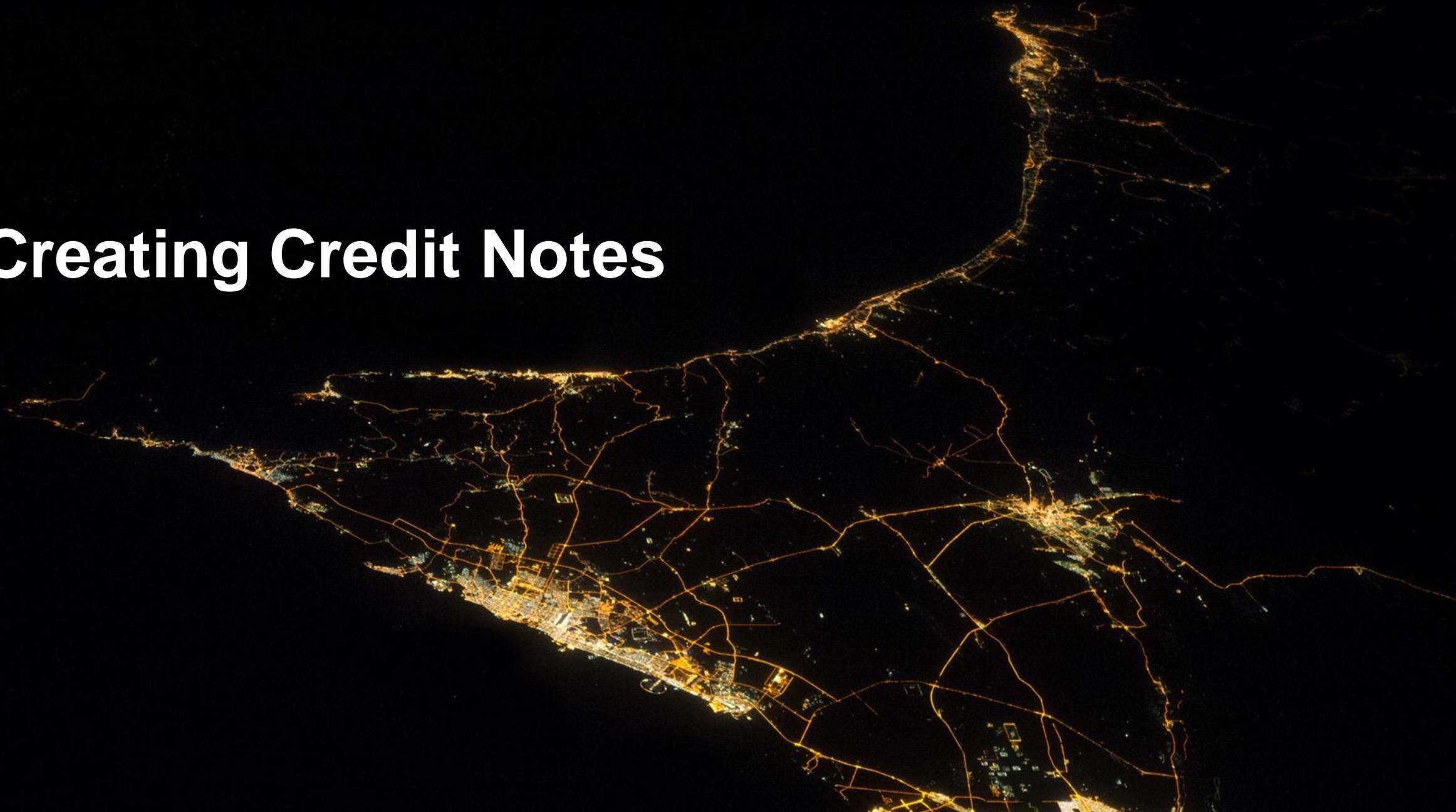


The screenshot shows the top right of the invoice creation interface. A grey box displays 'Total 250.00'. Below it are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'. The 'Calculate' button is highlighted with a red box. Below the buttons is a 'Comments' section with a '0' icon, a 'Mute Comments' dropdown, and an 'Enter Comment' text area. A red arrow points from the 'Calculate' button to the 'Send Invoice' button in the confirmation window below.



The screenshot shows a confirmation pop-up window with a blue header 'Are you ready to send?' and a close button (X). The main text reads: 'Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.' At the bottom, there are two buttons: 'Continue Editing' and 'Send Invoice', with the 'Send Invoice' button highlighted by a red box.

# 3. Creating Credit Notes



# Creating Credit Notes – Option 1

1. Click on the **Orders** tab.
2. Search for the purchase order to be credited and click on the **red coin stack icon** to create credit note.

Please **Note**: Any disputed invoices by Accounts Payable will need to be resolved by issuing a credit note.

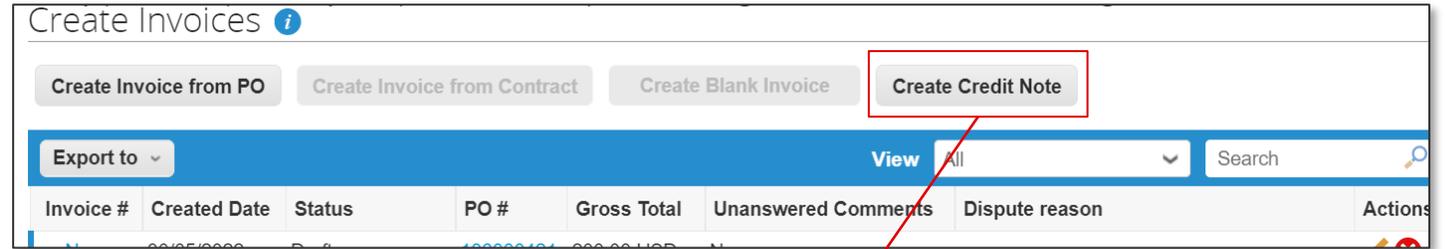
The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below this, there are sub-tabs for 'Orders', 'Order lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Deliveries'. The main content area is titled 'Purchase Orders' and includes a 'Select Customer' dropdown set to 'Kantar' and a 'Configure PO Deliver' button. Below this, there is a section for 'Instructions From Customer' with a text box containing instructions. A table of purchase orders is displayed with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row is highlighted, and a red box highlights the 'Create Credit Note' icon in the Actions column. A search bar is also visible in the top right of the table area.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
106000421	30/05/2022	Issued	None	2 DAY of US Supplier Webinar Demo	No	200.00 USD		
191000420	30/05/2022	Issued	None	1 DAY of US Supplier Webinar Demo	No	100.00 USD		
106000419	30/05/2022	Issued	None	2 DAY of US Supplier Webinar	No	200.00		

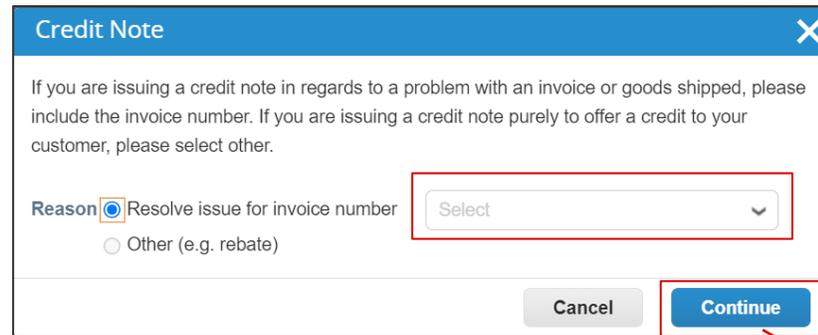
# Creating Credit Notes – Option 2

1. Click the **Invoices** tab. Then click **Create Credit Note**
2. Select the invoice number from **Resolve issue for invoice number** that you want to create a credit note against. Then click **Continue**.
3. Choose from **Completely cancel the invoice with a credit note** or **Adjust invoice with a credit note**. Then click **Create**.

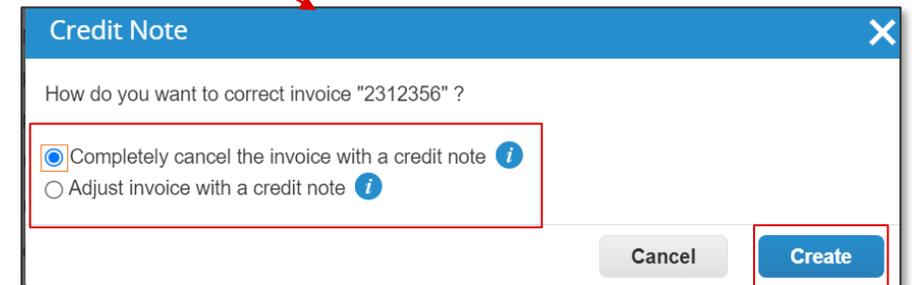
The example used over the following pages is a partial credit note.



The screenshot shows the 'Create Invoices' page with a navigation bar containing buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a red box. Below the navigation bar is a table with columns: Invoice #, Created Date, Status, PO #, Gross Total, Unanswered Comments, Dispute reason, and Actions. A 'View' dropdown is set to 'All' and a search bar is present.



The 'Credit Note' dialog box contains the following text: '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.' Below this is a 'Reason' section with two radio buttons: 'Resolve issue for invoice number' (selected) and 'Other (e.g. rebate)'. A dropdown menu is next to the selected option, with 'Select' visible. At the bottom are 'Cancel' and 'Continue' buttons. A red box highlights the dropdown menu, and a red arrow points from the 'Create Credit Note' button in the previous screenshot to this dialog.



The 'Credit Note' dialog box asks: 'How do you want to correct invoice "2312356" ?'. It has two radio button options: 'Completely cancel the invoice with a credit note' (selected) and 'Adjust invoice with a credit note'. Both options have an information icon (i) to their right. At the bottom are 'Cancel' and 'Create' buttons. A red box highlights the selected option, and a red arrow points from the 'Continue' button in the previous dialog to this one.

# Creating Credit Notes

4. **Complete header fields.** Please ensure that the information used to generate the Credit Note in Coupa is the same data from your own ERP system.

**Credit Note #:** Enter the credit note number generated in your own ERP system.

**Credit Note Date:** Set automatically at time of submission.

**Payment Terms:** These are the payment terms from the PO.

**Currency:** This is the currency from the PO or the original invoice.

**Delivery Number:** Driven by the original invoice.

**Status:** Current status of this credit note.

**Original Invoice #:** Reference the original invoice number for this credit note.

**Original Invoice Date:** Reference the original invoice date for this credit note.

**Legal Invoice Document:** Please do **NOT** attach a copy of the credit note from your system. As per the T&Cs agreed, Coupa will issue the legal credit note on your behalf.

**Supplier Note:** Enter any notes for Kantar.

## Create Credit Note Create

### General Info

\* Credit Note #

**Credit Note Date** Set automatically at time of submission

**Payment Term** 60 DAYS, EOM

\* Currency USD 

**Delivery Number**

**Status** Draft

\* Original Invoice Number

\* Original Invoice Date

**Legal Invoice Document**

No file chosen

**Supplier Note**

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

# Creating Credit Notes

**Attachments:** Attach supporting documentation; all types of attachments are supported. Please do NOT attach a copy of the credit note from your system. As per the T&Cs agreed, Coupa will issue the legal credit note on your behalf.

## Please NOTE:

- For Coupa compliant e-invoicing countries, as per the T&Cs agreed, Coupa will issue the legal invoices on your behalf. Do NOT attach or issue to Kantar a copy of an invoice generated from your system. Please refer to section 6. Appendix for Coupa compliant e-invoicing country list
- For non Coupa compliant e-invoicing countries, the Image Scan field will be mandatory for you to attach a copy of an invoice from your system
- Coupa E-Invoicing is designed to enable compliance with regulatory requirements imposed on sending / receiving electronic invoices by the respective tax jurisdictions in the aforementioned supported countries.

### General Info

\* Credit Note #

Credit Note Date Set automatically at time of submission

Payment Term 60 DAYS, EOM

\* Currency

Delivery Number

Status Draft

\* Original Invoice Number

\* Original Invoice Date  

Legal Invoice Document  No file chosen

Supplier Note

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

# Creating Credit Notes

5. Complete header level fields.

The **From** and **To** section will be defaulted based on what you have in the original invoice.

 From

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**\* Supplier** US Supplier Webinar

**Supplier Tax ID**

**\* Invoice-From Address** US Supplier Webinar   
123  
New York, 10001  
United States

**\* Remit-To Address** US Supplier Webinar   
123  
New York, 10001  
United States

**\* Ship-From Address** US Supplier Webinar   
123  
New York, 10001  
United States

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 To

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**Customer** Kantar

**\* Bill-To Address** Kantar Consulting LLC  
3, World Trade Center,  
175 Greenwich St,  
NEW YORK, 10007  
United States

**Buyer VAT IDTax**

**Ship To Address** 3630 Peachtree Road  
ATLANTA, 30326  
United States

# Creating Credit Notes

6. Complete line level information. Here you may edit the **Qty** and/or **Price** if you are sending a partial credit note. Click **Adjustment type** and choose **Quantity**, **Price** or **Other**. You can edit both quantity and price if you choose Other.

You can also delete lines by clicking the **delete icon**.

You can then add any applicable **Tax** by choosing the correct **Tax Rate** for each line. The Tax rate would typically be the same as that applied to the original invoice.

**Please NOTE:** For Credits, enter a positive price if the line is amount-based and only contains a price field. If the line is quantity-based, enter a positive quantity and leave the price as positive.

The screenshot shows the 'Lines' interface for creating a credit note. The 'Adjustment Type' is set to 'Quantity'. The 'Qty' field is set to 1.0, and the 'Price' field is set to 100.00. The 'UOM' is set to 'DAY'. The 'PO Line' is 106000408-1, and the 'Contract' is 'US Supplier Webinar'. The 'Supplier part number' field is empty. The 'Billing' information is 'LV\_Test Parent-LV\_Test Child\_106'. The 'Taxes' section shows a table with columns for Tax Description, Tax Rate, Tax Amount, and Tax Reference. The Tax Rate is 0.000 and the Tax Amount is 0.00.

Adjustment Type	Qty	UOM	Price
Quantity	1.0	DAY	100.00

PO Line	Contract	Supplier part number
106000408-1	US Supplier Webinar	

Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	

# Creating Credit Notes

7. Click **Calculate**. This will work out the new total for the credit note.

8. To add a comment for Kantar, enter your comment in the **Comments** box and click **Add Comment**. When Kantar responds, you will receive a notification and will also be able to see their response here.

All comments entered here will be viewable to Kantar. The comment function for credit note is the same as it for PO and invoices.

If you want to save the credit note for later, click **Save as draft**. If you are ready to submit the credit note, click **Submit** and then click **Send Credit note** in the pop-up confirmation window.

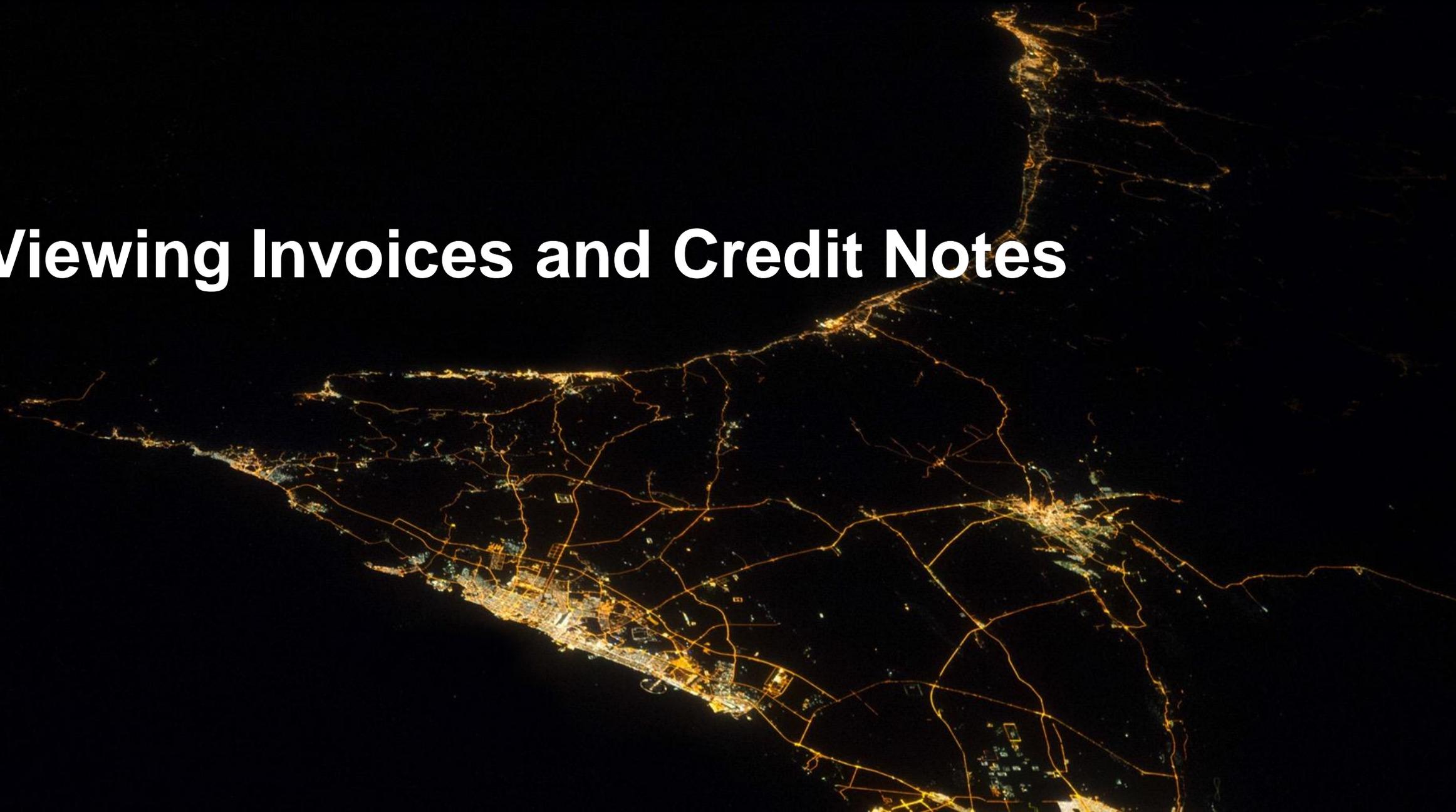
The screenshot displays the credit note creation interface. At the top, there are three green plus icons with labels: '+ Add Line', '+ Pick lines from PO', and '+ Pick lines from Contract'. Below these is a 'Total Taxes' section with a table:

Lines Net Total	100.00
Lines Tax Totals	20.00
<hr/>	
Shipping	<input type="text"/>
<hr/>	
Total Tax	20.00
Net Total	100.00
<b>Total</b>	<b>120.00</b>

Below the table are five buttons: 'Delete', 'Cancel', 'Save as draft', 'Calculate' (highlighted with a red box), and 'Submit'.

Below the buttons is a 'Comments' section, also highlighted with a red box. It features a '0 Comments' header with a 'Mute Comments' dropdown. There is an 'Enter Comment' text area with a small icon on the right. Below the text area is a note: 'Send comment notification to a user by typing @name (ex. @JohnSmith)'. There is an 'Attachments' section with 'Add File' and 'URL' options. At the bottom right of the comments section is an 'Add Comment' button.

# 4. Viewing Invoices and Credit Notes



# Viewing Invoices and Credit Notes

You can see the status of an invoice & credit note by clicking **Invoices** from the top menu bar and looking up the **Status** column.

On top of all the invoices, there is instruction from Kantar at the Instructions From Customer field.

The Status explanations are as follows:

1. **Approved:** The invoice/credit note has been accepted for payment by your customer.
2. **Disputed:** The invoice/credit note has been disputed.
3. **Draft:** The invoice/credit note has been created, but it hasn't been submitted to your customer yet.
4. **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.

coupa supplier portal

US SUPPLIER | NOTIFICATIONS 23

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogues Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer Kantar

## Invoices

**Instructions From Customer**  
For any queries not responded to by the requestor of the invoice, please comment @AP in the chat or send an email to xxxx@servicenow.com

Create Invoices

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
3212123	30/05/2022	Approved	106000421	220.00 USD	No		
3484953	30/05/2022	Approved	106000421	220.00 USD	No		
None	30/05/2022	Draft	106000421	200.00 USD	No		
2312356	26/05/2022	Approved	106000417	220.00 USD	No		
2345678	26/05/2022	Approved	191000418	110.00 USD	No		
4366768	26/05/2022	Approved	106000416	220.00 USD	No		
23546889	26/05/2022	Pending Approval	191000414	110.00 USD	No		

# Viewing Invoices and Credit Notes

- 5. Pending Approval:** The invoice/credit note is currently under review by your customer.
- 6. Processing:** The invoice/credit note is being processed by the Accounts Payable department and should be paid soon.
- 7. Voided:** There's something wrong with the invoice/credit note. Contact your customer to get the invoice/credit note back on track.
- 8. 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.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Invoices' section is active, and the customer 'Kantar' is selected. Below the navigation, there 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 #	Gross Total	Unanswered Comments	Dispute reason	Actions
3212123	30/05/2022	Approved	106000421	220.00 USD	No		
3484953	30/05/2022	Approved	106000421	220.00 USD	No		
None	30/05/2022	Draft	106000421	200.00 USD	No		 
2312356	26/05/2022	Approved	106000417	220.00 USD	No		
2345678	26/05/2022	Approved	191000418	110.00 USD	No		
4366768	26/05/2022	Approved	106000416	220.00 USD	No		
23546889	26/05/2022	Pending Approval	191000414	110.00 USD	No		

# Viewing Invoices and Credit Notes - Payment status

- 1. Click and open an invoice.
- 2. Scroll down and expand the **Payments** section. You will see the payment information of that invoice.

2312356	26/05/2022	Approved	106000417	220.00 USD	No
2345678	26/05/2022	Approved	191000418	110.00 USD	No

Comments Mute Comments

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

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

Add Comment

Payments Payments

Status Ready to Pay

Paid-in-Full Date None

Payment Reconciliation Details

Status	Date	Type	Description	Amount
			Total Reconciled	0.00
			Invoice Total	220.00
			<b>Remaining Balance</b>	<b>220.00</b>

# Viewing Invoices and Credit Notes- Payment status

At the bottom of the invoice or credit note, there is **History**. Expand it and you can see all the historical activities of the invoice or the credit note.

 History ▼

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On **26/05/2022** at **15:59**, Coupa  
Invoice delivery completed. Invoice received on behalf of Kantar

Updated **Status** from Processing to Approved

Legal invoice digital signature **validated** and data integrity confirmed

Legal invoice digitally **signed** on behalf of supplier  
Legal invoice **created** on behalf of supplier

# 5. Shipping Charges



# Shipping Charges

- Where it is agreed that your invoice will include a separate shipping charge (as opposed to any shipping costs being factored into the underlying price of the goods), this needs to be provided to Coupa at invoice summary level.
- Where a PO line subjects to different rates of Tax are to be invoices, you will need to split your invoices to ensure Tax compliance.

# 6. Tax Guidance



# Tax Guidance

1. You should ensure that the correct Tax is charged on your invoice. If there are set tax rates for the county you are invoicing from, these will appear as a drop down at the line level. If not, you should manually enter the value in the 'Tax Rate' field at the line level.
2. Please ensure that there is only one applicable tax rate per invoice line, for example, 20% or 5%. Where you are supplying items where different tax rates are applicable, please split these onto multiple invoice lines.
3. If a shipping charge and/or handling charge has been agreed and is not included in the price of your goods, please enter this at the invoice header/summary level. The shipping/handling charge should be inclusive of tax and will be added to the total gross amount.
4. For UK invoices, please note that there are 3 different "Zero" tax treatments in Coupa and each have different meanings. Please see below compliance requirements for them on invoices.
  - 1) Zero rated transactions: These are transactions which are subject to VAT, but the VAT rate is 0%. Please note that Coupa will require you to add a note in the "Tax Reference" field to show why these goods are zero rated (e.g. VAT zero-rate: International freight).
  - 2) Exempt transactions: These are transactions that are exempt from VAT. Please note that Coupa will require you to add you to add a note in the "Tax Reference" field to show why these goods are Exempt (e.g. VAT Exempt: Insurance).
  - 3) Self-accounted VAT (Reverse Charge): These are transactions where the customer (Kantar) is liable to self-account for any due tax. This typically relates to exported services but may apply to specific types of goods supplied in the UK. Please add the reference "Reverse Charge or locally required text" to indicate that the reverse charge is applicable.

# 7. Coupa compliant e-invoicing country list



# Coupa compliant e-invoicing country list

Please note that Coupa continue add new countries to its complaint e-invoicing country list. This list was lastly updated at June 2022.

Compliant country list				
UK	Spain	Norway	Serbia	Pakistan
Ireland	Czech Republic	Slovenia	Romania	Namibia
Austria	Poland	Latvia	Luxembourg	Hungary
Germany	Slovakia	Estonia	Mexico	South Korea
Netherlands	Australia	Lithuania	United Arab Emirates	Brazil
France	Singapore	Bulgaria	Bahrain	
Italy	Canada	Croatia	Montenegro	
Sweden	Malta	India	Honk Kong	
Switzerland	Denmark	Japan	China	
South Africa	Finland	Malaysia	Bangladesh	
USA	Greece	New Zealand	Myanmar	

# 8. Non Home Currency Invoices



# Non Home Currency Invoice

- If your invoice is in a different currency to your default home currency the “Exchange Rate” box will appear.
- Please follow your country’s specific rules to determine the exchange rate you input.
- For UK suppliers HM Revenue & Customs (HMRC) guidance is that suppliers should use one of 3 exchange rates
  1. Market selling rate at time of supply. These rates are often published in national newspapers
  2. Exchange rate published by HMRC
  3. Custom exchange rate pre-approved from HMRC

The invoice total details will show both the PO currency and your home currency amounts.

The screenshot shows a form for creating a non-home currency invoice. The 'Exchange Rate' field is highlighted with a tooltip explaining that Coupa uses this rate to calculate local currency tax amounts. Below the form is a summary table showing totals in both GBP and USD, and a row of action buttons including 'Submit'.

Total VAT	20.00 GBP	20.00 USD
Net Total	100.00 GBP	100.00 USD
<b>Gross Total</b>	<b>120.00 GBP</b>	<b>120.00 USD</b>

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

An aerial night photograph of a city, showing a dense network of glowing yellow and orange lights from buildings and streets. The city is set against a dark background, with the lights creating a complex, web-like pattern. The text is overlaid on the left side of the image.

# **9. Foreign Currency Invoice for Suppliers with Remit to address in UK**

# VAT on UK Suppliers Foreign Currency Invoice

- If a supplier selects a remit to address in the UK VAT will be added to the invoice to comply with UK VAT law.
- Any VAT chargeable will need to be converted into sterling
- Select the correct VAT rate for the good/service you are providing

## Taxes

VAT Rate

VAT Amount

 Tax Rate: Must be present on United Kingdom compliant invoice

## Totals & Taxes

Lines Net Total	10.00
Lines VAT Totals	2.00

Shipping

Total VAT	2.00 GBP	2.00 USD
Net Total	10.00 GBP	10.00 USD
<b>Gross Total</b>	<b>12.00 GBP</b>	<b>12.00 USD</b>

**Thank you!**

