

(Suppliers) Managing POs, Invoices, & Payments with Atlantic Aviation

Quick Reference Guide (QRG)

Updated 10/29/2025

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0. Introduction

Section Overview: This section explains the key changes for suppliers receiving POs, submitting invoices, and receiving payments from Atlantic Aviation.

0.1 Key Changes for Suppliers

Atlantic Aviation is implementing Coupa as its new system for issuing and managing Purchase Orders (POs), receiving invoices, and managing payments. Below highlights how Suppliers will transact with Atlantic Aviation differently using Coupa:

- Atlantic Aviation will be sending electronic purchase orders (PO) for Suppliers to fulfill and invoice against. All POs will now be **delivered electronically through the following channels:**
 - **Coupa Supplier Portal (CSP):** For Suppliers who have a CSP account, you will also be able to log into Coupa to manage POs and Invoices for Atlantic Aviation.
 - **Purchase Order (PO) Email:** Suppliers will receive an email with links to view the PO, manage & act on the PO and create an invoice.
 - **cXML:** If enabled with Atlantic Aviation, Suppliers can receive purchase orders directly to their system. To enable cXML, reach out to procurement@atlanticaviation.com
- **Tip:** It is highly recommended that you set up a CSP account to simplify the invoice & payment process.

1. Transacting with Atlantic Aviation via Coupa Supplier Portal (CSP)

Section Overview: This section explains how to submit invoices to Atlantic Aviation from a Purchase Order received.

1.1 Receiving & Managing POs via CSP

1. Log into your CSP account at <https://supplier.coupahost.com>. Ensure Atlantic Aviation is selected on the “**Select Customer**” dropdown. Click “**Orders**” to view a PO.

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders (highlighted), Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below this, a secondary navigation bar shows various order-related actions like Order Lines, Returns, Order Changes, etc. The 'Select Customer' dropdown is set to 'Atlantic Aviation'. The main section is titled 'Purchase Orders' and includes instructions from the customer. A table lists purchase orders, with the first one (MRI-145) highlighted.

PQ Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MRI-145	01/18/23	Issued	None	Sample Goods Sample Services	No	750,000.00 USD		

2. Add **Shipment Tracking** by clicking “Add.” Then, complete the following fields and click “Save.”

General Info

Shipping

Status Issued - Sent via Email

Order Date 08/04/23

Revision Date 08/04/23

Requester Caitlin Cyron

Email caitlin.cyron@gatesfoundation.org

Payment Term Net60

Attachments None

Ship-To Address One Kendall Square
Building 600, Suite 6-301
Cambridge, MA 02139
United States
Attn: Caitlin Cyron

Terms FOB - Destination

Shipment Tracking

No shipment tracking.

Add

Create Shipment Tracker

* Tracking Number

* Carrier

Fedex

Note

Cancel

Save

- **Tracking Number** – the tracking number provided by your carrier
- **Carrier** – select a carrier from the dropdown
- **Note** – add any notes if applicable

3. Use the comments box to add comments for Atlantic, then click **“Add Comment.”**

1 Comment

Mute Comments

Enter Comment
comment
Add File | URL
Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

i Tip: All communication with the Atlantic Aviation requester, including questions, clarifications, and updates, should be conducted through the comments section.

4. Review other key fields on the Purchase Order. Details described below.

- **Requester** – who (from Atlantic Aviation) ordered it
- **Ship-To Address** – where the goods or services need to go
- **Item or Service Description(s)** – what the order consists of
- **Quantity (Products only)** – how much was ordered
- **Price & Total** – the cost of each line
- **Invoiced** – the amount already invoiced for this PO
- **Start/End Date (Services only)** – when the services are needed

Purchase Order #3159

General Info

Status Issued - Sent via Email
Order Date 08/15/25
Revision Date 08/15/25
Requester Joanna Cruz
Email Joanna.Cruz@atlanticaviation.com
Payment Term None
Attachments None
Acknowledged ☐
Assigned to Select

Shipping

Ship-To Address 2040 Airport Road
Atlanta, 30341
United States
Location Code: PDK
Attn: Joanna Cruz
Terms None

Shipment Tracking

No shipment tracking.

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Price	Total	Invoiced
		Demo Service4	1,000.00	1,000.00	0.00
	Supplier Part Number	Supplier Auxiliary Part Number	Manufacturer Name	Manufacturer Part Number	Service Start Date
	None	None	None	None	08/11/25
	Service End Date				
	08/26/25				

1.2 Creating an Invoice in CSP

1. On the **"Invoices"** tab, you have 2 options to create an invoice:

coupa supplier portal JAMES NOTIFICATIONS 1 HELP

Home Invoices Orders Business Profile Payments Service Sheets Items ASN Sourcing Forecasts Setup More...

Invoices Invoices Lines Payment Receipts Advanced

Select customer Atlantic Aviation

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 Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
None	07/02/25	Draft	None	0.00	No		

- a. **"Create Invoice from PO"** – CSP will show you your **orders not invoiced**. Find the PO that you want to invoice, then click the **gold coin icon**.

coupa supplier portal JAMES NOTIFICATIONS 1 HELP

Home Purchase Orders Purchase Order Lines Payment Receipts Advanced

Select customer Atlantic Aviation

Purchase Orders

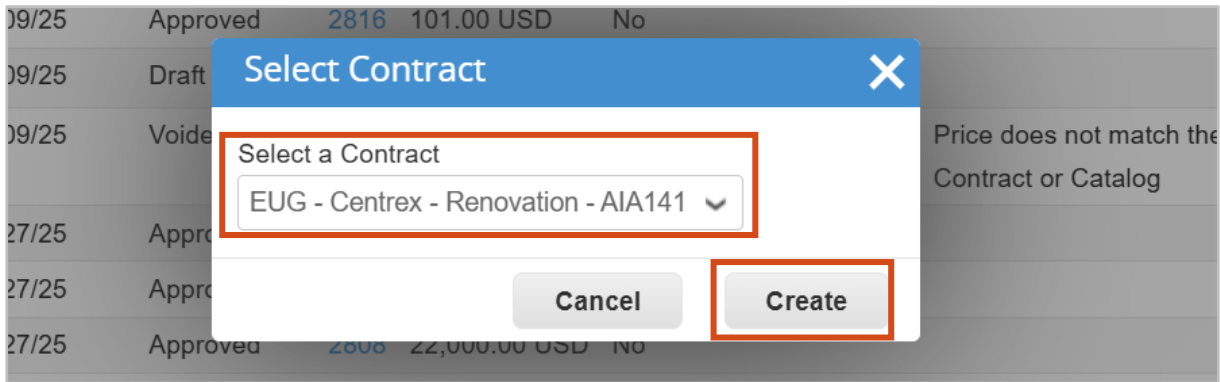
Instructions From Customer
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Invoice from a Purchase Order

Export to View Orders not invoiced Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Action
2977	07/14/25	Issued	None	xxy	No	2,300.00 USD		

- b. **“Create Invoice from Contract”** – CSP will prompt you to select a current contract with Atlantic. Notify your Atlantic contact if you do not see an expected contract. Click **“Create.”**



2. Some of the information may auto-populate from the step #1. Verify or complete the following fields:

Invoice #1234567 [Edit](#)

Please fix the errors below

General Info

* Invoice # 1234567

* Invoice Date 05/19/25

Payment Term

* Currency USD

Status Draft

* Image Scan [Choose File](#) No file chosen
⚠ Must be present on invoice

Supplier Note

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

From

* Supplier Test5

Supplier Tax ID 123456789

* Invoice From Address Test5
123 Home street
Dallas, TX 75001
United States

* Remit-To Address No address selected
⚠ Can't be blank

* Ship From Address Test5
123 Home street
Dallas, TX 75001
United States

- **Invoice #** – must be unique from other invoices you have submitted, and match the number on your invoice image/pdf upload
- **Invoice Date** – cannot be pre- or post-dated
- **Image Scan** – click **“Choose File”** and upload an invoice image/pdf upload
- **Supplier Note** – any additional context for Atlantic Aviation
- **Attachments** – any additional context for Atlantic Aviation
- **Remit-To Address** – click the magnifying glass and select a remit-to address from your CSP profile if it is not already showing

- i Tip:** To change remit-to address update information on the External Update Form by navigating to Business Profile → Information Requests → External Update Form.
 - i Tip:** Coupa will mark the “**Invoice #**” field red if your invoice # is not unique. Try a different number if this happens.
3. Add an Atlantic **requester** if prompted. This should be the **email and full name** of the person who requested the goods/services you are providing.

To

Customer Atlantic Aviation

*** Requester Email**

*** Requester Name**

4. Next you will add/verify the **lines**. These are the goods and/or services you are providing.
- i Tip: Partial Invoices** – you can **adjust the price/quantity for a line and submit a partial invoice** if you are providing the services/goods across several installments/shipments.
 - a. For **Goods** lines, add/verify the following fields:

Lines ☐ Line Level Taxati

Type	Description	Qty	UOM	Price	
Qty ▾	item x	20	Case ▾	200	0.00 €

PO Line
None [Clear](#)

Service Sheet Line
None

Contract

Supplier Part Number

[+ Add Line](#)
[+ Pick lines from PO](#)
[+ Pick lines from Contract](#)

- **Type** – “Qty” for goods lines
- **Description** – the item that you are submitting an invoice for
- **Qty** – the quantity of that item
- **UOM** – the base unit for the goods, typically “Each”
- **Unit Price** – the dollar amount for 1 unit of product

- i Tip:** Select from the bottom to add more lines.

b. For **Services** lines, add/verify the following fields:

Lines Line Level Taxation

Type	Description	Price
Amt	item x	200

0.00

PO Line: None [Clear](#) Service Sheet Line: None Contract: Supplier Part Number:

[+ Add Line](#) [+ Pick lines from PO](#) [+ Pick lines from Contract](#)

- **Type** – “Amt” for services lines
- **Description** – the service you are submitting an invoice for
- **Price** – the total cost of that service

i Tip: Select from the bottom to add more lines.

5. Add **Shipping, Handling, Miscellaneous, and Tax charges** at the bottom of the invoice.

+ Add Line + Pick lines from PO + Pick lines from Contract

Totals & Taxes

Lines Net Total	0.00
Shipping	
Handling	
Misc	
Tax	% 0.000
Total Tax	0.00
Net Total	0.00
Total	0.00

Delete Cancel Save as Draft Calculate **Submit**

6. Click **“Calculate”** to see the invoice total and then click **“Submit.”**

Delete Cancel Save as Draft **Calculate** **Submit**

i Tip: If you submit an invoice with information different than the original PO, there will be **an additional approval process which could delay payment.**

7. Click **“Send Invoice”**

Are You Ready to Send? ✕

You're about to send an invoice to **Atlantic Aviation** for a total amount of **250,000.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing **Send Invoice**

i Tip: After you submit the invoice, the requester will be notified to approve it.

1.3 Tracking Payment Status via CSP

1. On the “**Invoices**” tab, you can search for an invoice in the search bar and see the status in the “**Status**” column.

coupa supplier portal

CAIT | NOTIFICATIONS 6 | HELP

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

Invoices Invoices Lines Payment Receipts

Select Customer Bill & Melinda Gates Foundation and its Subs...

Invoices

Instructions From Customer

Please delete **unused** lines in your invoice.

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 #	Total	Unanswered Comments	Dispute Reason	Actions
Demo Inv 01	08/04/23	Pending Approval	MRI-2	250,000.00 USD	Yes		

Per page: 15 | 45 | 90

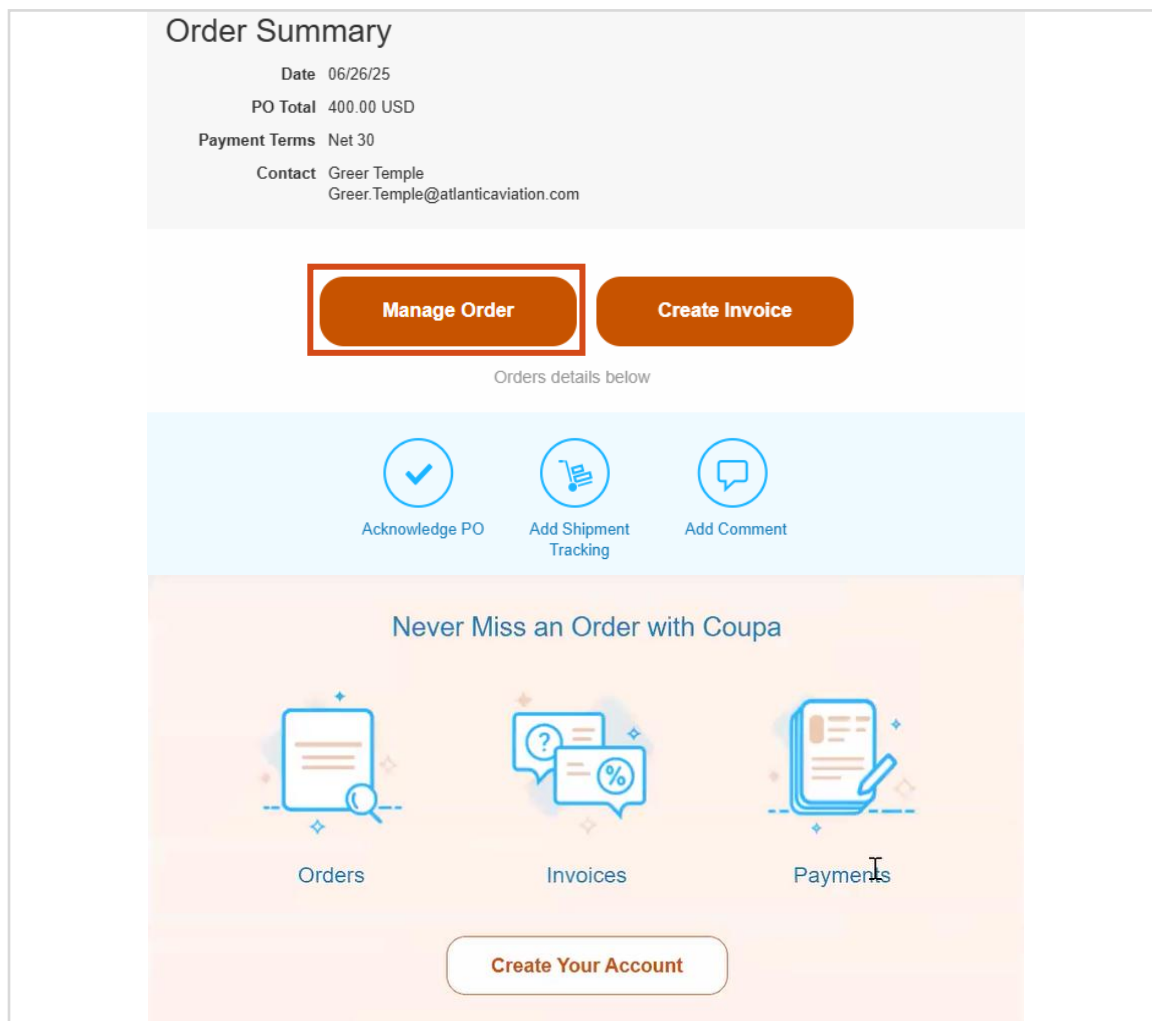
- The “**Status**” value will be one of the following:
 - **Draft** – you have not submitted the invoice
 - **Pending Approval** – you submitted the invoice and it is pending approval
 - **Approved** – the invoice is ready for pay by Atlantic Aviation
 - **Disputed** – a correction is needed, see [4. Managing Disputed Invoices](#)
 - **Paid** – Atlantic has issue the payment for your invoice

2. Transacting with Atlantic via Email

Section Overview: This section describes how to receive POs, submit invoices, and track payment status via email.

2.1 Receiving & Managing POs via Email

1. When Atlantic Aviation places an order for goods or services, you will receive an email from `do_not_reply@atlanticaviation.coupahost.com` with the subject line **“New Purchase Order from Atlantic Aviation.”** From this email you can view and manage the order by clicking **“Manage Order.”**



- i Tip:** When you click on any links in the email, you will be prompted to click **“Generate One-Time Password”** to get a One-Time Password **or click “Log in”** if you have a CSP account.

Verify Your Access for Purchase Order #2871

Your access to this page has expired. Please click on the button below. You will receive an email with the one-time password (OTP), using which you can access this page.

Generate One-Time Password

Already have an account? [Log in](#)

- i Tip:** If you already set up a One-Time Password within the last 24 hours, your screen will look like this. Find that email and enter the password on this screen.

Verify Your Access for Purchase Order #2868

Enter the one-time password sent to ja*****@ja*****.

Enter One-Time Password

Please check the box below to proceed.

☐ I'm not a robot


reCAPTCHA
Privacy - Terms

Verify One-Time Password

5. Add **Shipment Tracking** by clicking **“Add.”** Then, complete the following fields and click **“Save.”**

Status Issued - Sent via Email	Ship-To Address One Kendall Square Building 600, Suite 6-301 Cambridge, MA 02139 United States Attn: Caitlin Cyron
Order Date 08/04/23	
Revision Date 08/04/23	
Requester Caitlin Cyron	
Email caitlin.cyron@gatesfoundation.org	Terms FOB - Destination
Payment Term Net60	 Shipment Tracking  Add

Create Shipment Tracker



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

* Tracking Number

* Carrier

Note

CancelSave

- **Tracking Number** – the tracking number provided by your carrier
- **Carrier** – select a carrier from the dropdown
- **Note** – add any notes if applicable

6. Use the comments box to add comments for Atlantic, then click **“Add Comment.”**

 Comment

Mute Comments

Enter Comment

Add File | URL

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

Add Comment

7. Review other key fields on the Purchase Order. Details described below.

Purchase Order #3159

General Info

Status Issued - Sent via Email

Order Date 08/15/25

Revision Date 08/15/25

Requester Joanna Cruz

Email Joanna.Cruz@atlanticaviation.com

Payment Term None

Attachments None

Acknowledged ☐

Assigned to

Shipping

Ship-To Address 2040 Airport Road
Atlanta, 30341
United States
Location Code: PDK
Attn: Joanna Cruz

Terms None

Shipment Tracking

No shipment tracking.

Lines

Advanced		Search	Sort by	Line Number: 0 → 9
1	Type Item Demo Service4	Price 1,000.00	Total 1,000.00	Invoiced 0.00
Supplier Part Number None		Supplier Auxiliary Part Number None	Manufacturer Name None	Manufacturer Part Number None
Service End Date 08/26/25		Service Start Date 08/11/25		

- **Requester** – who (from Atlantic Aviation) ordered it
- **Ship-To Address** – where the goods or services need to go
- **Item or Service Description(s)** – what the order consists of
- **Quantity (Products only)** – how much was ordered
- **Price & Total** – the cost of each line
- **Invoiced** – the amount already invoiced for this PO
- **Start/End Date (Services only)** – when the services are needed

2.2 Creating an Invoice via Email

1. It is highly recommended that you set up a CSP account to simplify the invoice & payment process. Click “Create Your Account” to get set up.

Order Summary

Date 06/26/25
PO Total 400.00 USD
Payment Terms Net 30
Contact Greer Temple
Greer.Temple@atlanticaviation.com

[Manage Order](#) [Create Invoice](#)

Orders details below

[Acknowledge PO](#) [Add Shipment Tracking](#) [Add Comment](#)

Never Miss an Order with Coupa

[Orders](#) [Invoices](#) [Payments](#)

[Create Your Account](#)

2. If you choose not to sign up for the Coup Supplier Portal, you will be required to complete additional steps. Click **“Create Invoice”**.

Order Summary

Date 06/26/25
PO Total 400.00 USD
Payment Terms Net 30
Contact Greer Temple
Greer.Temple@atlanticaviation.com

Manage Order

Create Invoice

Orders details below


Acknowledge PO


Add Shipment Tracking


Add Comment

Never Miss an Order with Coupa


Orders

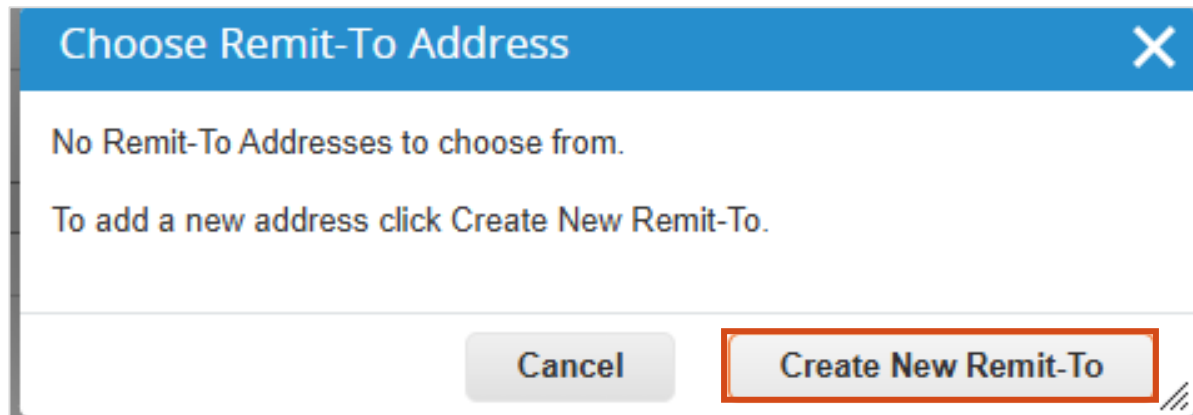

Invoices


Payments

Create Your Account

 **Tip:** You may have to follow the One-Time Passcode process explained in [2.1 Receiving & Managing POs via Email](#).

3. Coupa will prompt to create a remit to address before the invoice can be submitted.
Click **"Create New Remit-To"**.



4. Complete all required fields, then click “Create and Use”.

Enter a new address

Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online.

Company Information

Supplier Lehigh Lawns & Landscaping, Inc.

* Country/Region
United States

* Registered company legal name

Address

Remit To Name

* Line 1

Line 2

Line 3

Line 4

* City

State None

* Postal Code

Preferred Language English (United States)

Tax Registration

Tax Country/Region United States

Tax ID

Not For Cross-Border Invoices

Banking Information

Cancel
Create and Use

- **Country/Region**
- **Registered Company Legal Name**
- **Address** – Line 1, City, Postal Code

- i Tip:** Do not fill out “Banking Information” – any information entered in the “Banking Information” section will **not be sent to Atlantic Aviation**. To update your payment details, please **create a Coupa Supplier Portal account and submit any changes** to your business or payment information through the **External Update Form**.

Enter a new address

Line 2

Line 3

Line 4

* City

State

None

* Postal Code

Preferred Language

English (United States)

Tax Registration

Tax Country/Region

United States

Tax ID

Not For Cross-Border Invoices

Banking Information

NOTE: Banking information is required for compliant invoices when indicated (with a “”). Otherwise, banking info here is not required and is not validated.

Bank Name:

Beneficiary Name:

Bank Account Number:

Transit Code:

SWIFT Code:

Cancel

Create and Use

21

- i Tip:** For future transactions, Coupa may prompt you to choose a remit-to address. Click **“Choose.”**

Choose Remit-To Address

Information Supplier
123 Biz Street
Dallas, TX 75001
United States

Choose
Most Recently Used

5. Verify/complete the following fields:

Invoice #1234567 [Edit](#)

Please fix the errors below

General Info

From

* Invoice # 1234567

* Invoice Date 05/19/25

Payment Term

* Currency USD

Status Draft

* Image Scan Choose File No file chosen

Must be present on invoice

Supplier Note

* Supplier Test5

Supplier Tax ID 123456789

* Invoice From Address Test5

123 Home street

Dallas, TX 75001

United States

* Remit-To Address No address selected

Can't be blank

* Ship From Address Test5

123 Home street

Dallas, TX 75001

United States

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

- **Invoice #** – must be unique from other invoices you have submitted, and match the number on your invoice image/pdf upload
- **Invoice Date** – cannot be pre- or post-dated
- **Image Scan** – click **“Choose File”** and upload an invoice image/pdf upload
- **Supplier Note** – any additional context for Atlantic Aviation
- **Attachments** – any additional context for Atlantic Aviation
- **Remit-To Address** – click the magnifying glass and select a remit-to address if it is not already showing

- i Tip:** Coupa will mark the **“Invoice #”** field red if your invoice # is not unique. Try a different number if this happens.

6. Next you will add/verify the **lines**. These are the goods and/or services you are providing.

i Tip: Partial Invoices – you can **adjust the price/quantity for a line and submit a partial invoice** if you are providing the services/goods across several installments/shipments.

- For **Goods** lines, add/verify the following fields:

- Type** – “Qty” for goods lines
- Description** – the item that you are submitting an invoice for
- Qty** – the quantity of that item
- UOM** – the base unit for the goods, typically “Each”
- Unit Price** – the dollar amount for 1 unit of product

i Tip: Select from the bottom to add more lines.

- For **Services** lines, add/verify the following fields:

- Type** – “Amt” for services lines
- Description** – the service you are submitting an invoice for
- Price** – the total cost of that service

i Tip: Select from the bottom to add more lines.

7. Add **Shipping, Handling, Miscellaneous, and Tax charges** at the bottom of the invoice.

+ Add Line + Pick lines from PO + Pick lines from Contract

Totals & Taxes

Lines Net Total	0.00
Shipping	
Handling	
Misc	
Tax	% 0.000
Total Tax	0.00
Net Total	0.00
Total	0.00

Delete Cancel Save as Draft Calculate **Submit**

8. Click **“Calculate”** to see the invoice total and then click **“Submit.”**

Delete Cancel Save as Draft **Calculate** **Submit**

i Tip: If you submit an invoice with information different than the original PO, there will be **an additional approval process which could delay payment.**

9. Click **“Send Invoice”**

Are You Ready to Send? ✕

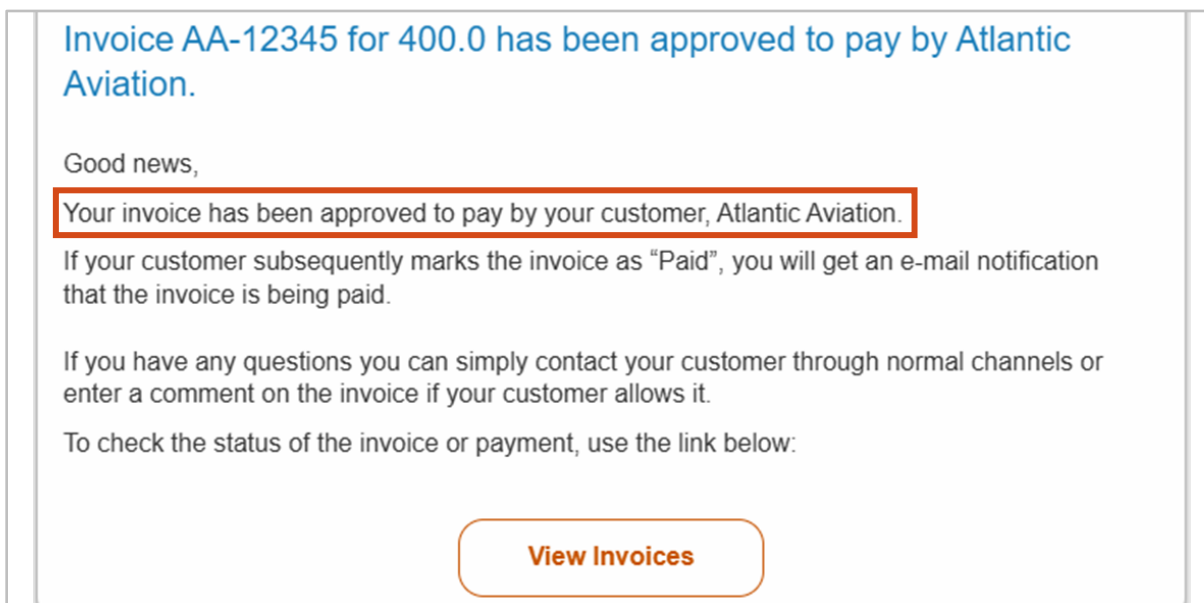
You're about to send an invoice to **Atlantic Aviation** for a total amount of **250,000.00**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing **Send Invoice**

10. You will receive a confirmation email that your invoice has been received by Atlantic. **Bookmark this email**, so that you can come back to track the invoice status.

2.3 Tracking Payment Status via Email

1. Coupa will automatically notify you when your invoice is **“Approved”** and **“Paid.”**



Invoice AA-12345 for 400.0 has been approved to pay by Atlantic Aviation.

Good news,

Your invoice has been approved to pay by your customer, Atlantic Aviation.

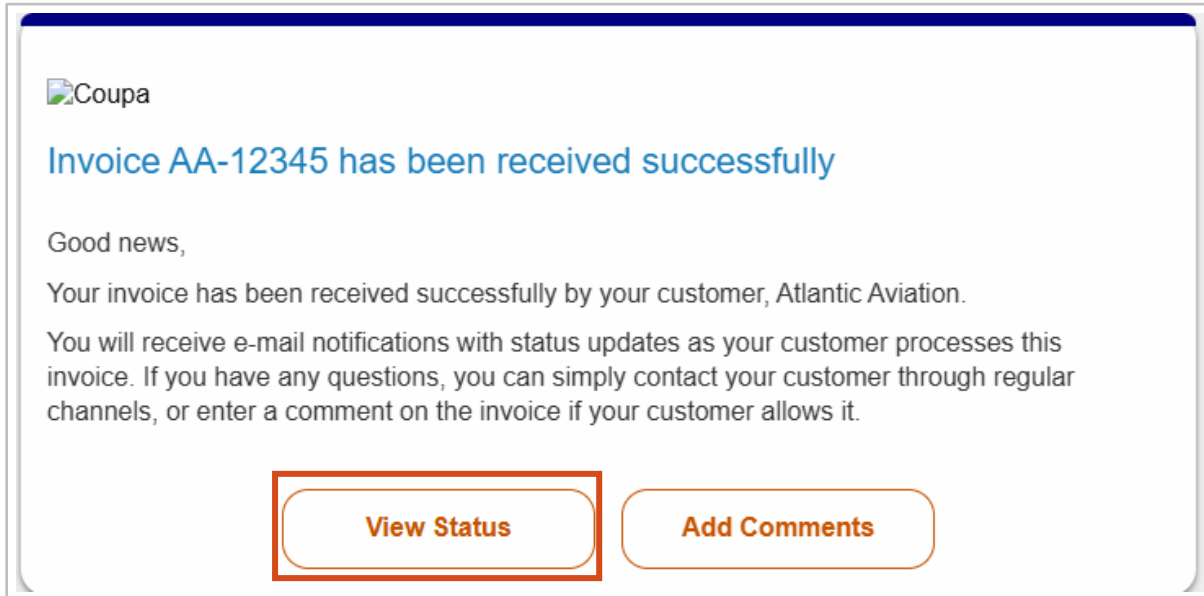
If your customer subsequently marks the invoice as “Paid”, you will get an e-mail notification that the invoice is being paid.

If you have any questions you can simply contact your customer through normal channels or enter a comment on the invoice if your customer allows it.

To check the status of the invoice or payment, use the link below:

[View Invoices](#)

2. If at any time you need to check the status manually, navigate back to the invoice confirmation email and click **“View Status.”**



 Coupa

Invoice AA-12345 has been received successfully

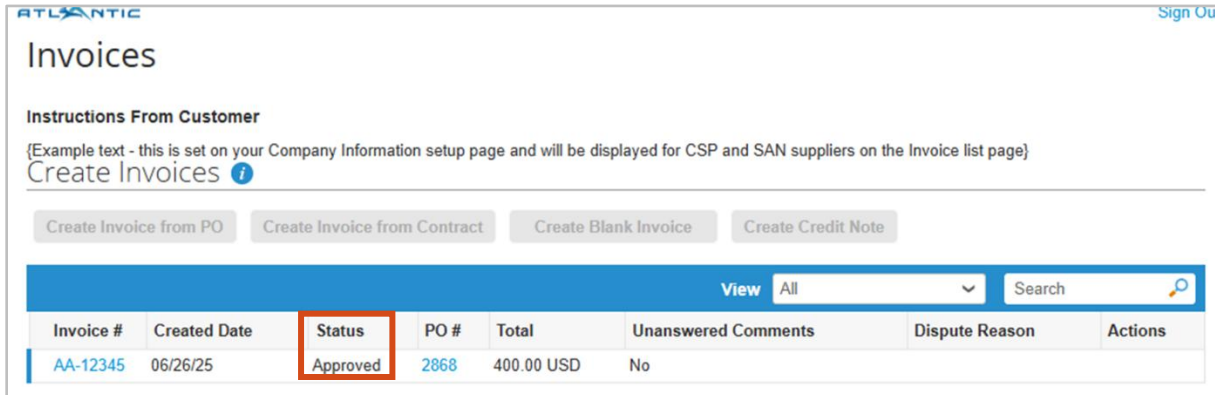
Good news,

Your invoice has been received successfully by your customer, Atlantic Aviation.

You will receive e-mail notifications with status updates as your customer processes this invoice. If you have any questions, you can simply contact your customer through regular channels, or enter a comment on the invoice if your customer allows it.

[View Status](#) [Add Comments](#)

3. The link will open a new page with the invoice and status



The screenshot shows the 'Invoices' page in the Atlantic system. At the top, there's a header with the Atlantic logo and a 'Sign Out' link. Below the header, the page title 'Invoices' is displayed. Underneath, there's a section for 'Instructions From Customer' with a placeholder text. A 'Create Invoices' link with an information icon is present. Below this, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table with invoice details is shown below the buttons. The table has columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The first row of data shows Invoice # AA-12345, Created Date 06/26/25, Status Approved (highlighted with a red box), PO # 2868, Total 400.00 USD, Unanswered Comments No, and Dispute Reason. The table also has a 'View' dropdown set to 'All' and a search bar.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
AA-12345	06/26/25	Approved	2868	400.00 USD	No		

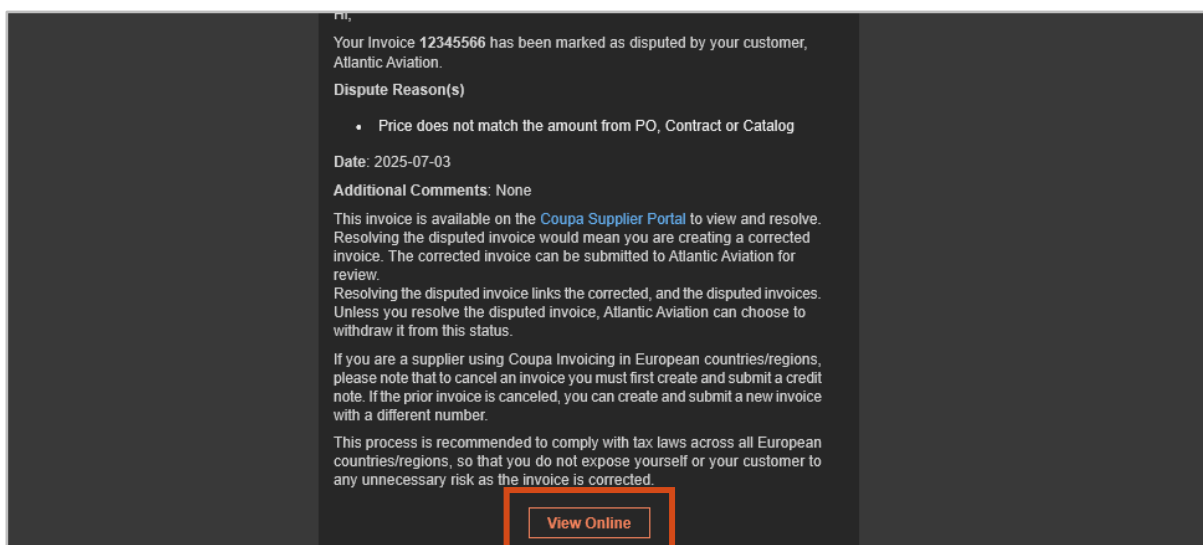
- The “**Status**” value will be one of the following:
 - **Draft** – you have not submitted the invoice
 - **Pending Approval** – you submitted the invoice and it is pending approval
 - **Approved** – the invoice is ready for pay by Atlantic Aviation
 - **Disputed** – a correction is needed, follow Atlantic’s comments
 - **Paid** – Atlantic has issue the payment for your invoice

3. Managing Disputed Invoices

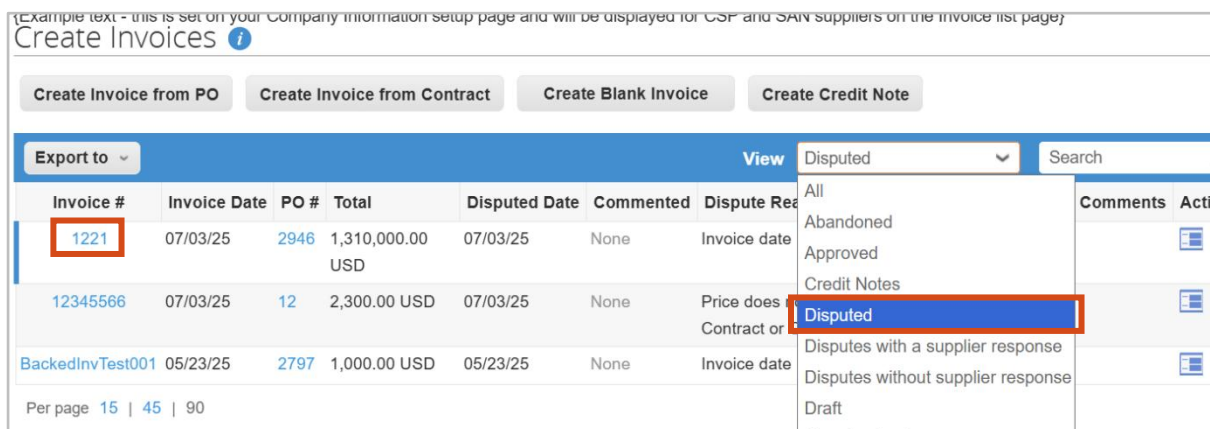
Section Overview: This section shows how to resolve invoices that Atlantic has disputed.

i Tip: Atlantic Aviation can **“Dispute”** invoices if they have incorrect information. The dispute can be resolved by **correcting and resubmitting the invoice or voiding it entirely.**

1. You will receive an email notification when the invoice is disputed. Click **“View Online.”**



2. Change the invoice view to **“Disputed”** to see all disputed invoice, then click on an invoice.



3. Scroll to the bottom of the invoice and select one of the following options:

Total Tax	0.00
Net Total	1,310,000.00
Total	1,310,000.00

- “Correct Invoice”** to edit using steps in [1.2 Creating an Invoice in CSP](#) and resubmit
- “Void”** and click **“Yes”** to cancel the invoice completely. You will not be paid for this invoice.

Void Invoice ✕

You have chosen to void this invoice in disputed status. Once voided, this invoice will be archived and will not be sent to the buyer team for review for payment. Please confirm if you would like to continue?

4. Submitting Credit Memos

Section Overview: This section describes how to submit credit memos in Coupa.

- i Tip:** Credit memos should be used to **cancel out an approved or pending invoice**.
 - i Tip:** Create a credit memo using the same method you used to create the invoice. (e.g., if invoice was created/sent using CSP, create credit memo in CSP)
1. On the **“Invoices”** tab, click **“Create Credit Note,”** select a **pending or approved invoice**, then click **“Create.”**

{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 *i*

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

Export to ▾

Invoice #	Invoice
1221	07/03/25
12345566	07/03/25
BackedInvTest001	05/23/25

Per page 15 | 45 | 90

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)

Select ▾

AA-713

ABTEST110002

inv0710_01

9882

12333

9990

- i Tip:** Select **“Other”** if you are submitting a rebate.

2. Select **“Completely cancel the invoice with a credit note”** if you want to cancel completely, or **“Adjust invoice with a credit note”** if you are correcting part of the invoice. Click **“Create.”**

Credit Note

How do you want to correct invoice "ABTEST110002" ?

☒ Completely cancel the invoice with a credit note
 ☐ Adjust invoice with a credit note

Cancel

Create

3. Add the following information to the credit note:

General Info

* Credit Note #

* Credit Note Date 07/14/25

Payment Term Net 45

* Currency USD

Status Draft

Original Invoice # ABTEST110002

Original Invoice Date 03/31/25

* Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

From

* Supplier AB Demo Supplier

Supplier Tax ID 2299112200

* Invoice From Address AB Demo Supplier
ABDEMO
1 State Street
Pittsburgh, PA 15210
United States

* Remit-To Address AB Demo Supplier
ABDEMO
1 State Street
Pittsburgh, PA 15210
United States

* Ship From Address AB Demo Supplier
ABDEMO
1 State Street
Pittsburgh, PA 15210
United States

- **Credit Note #** - unique ID
- **Image Scan** – upload an image of the credit note

4. Verify the credit amount

Lines

Adjustment Type Quantity

Type

Description

Qty

UOM

Price

Over Invoicing

-1.00

Each

600.00

-600.00

PO Line 12-1

Service Sheet Line None

Contract

Supplier Part Number

5. Click **“Submit”** and **“Send Credit Note.”**

Total Tax	-36.00
Net Total	-600.00
Total	-636.00

DeleteCancelSave as DraftCalculateSubmit

 **Tip:** The credit note will go through the same approval process as the original invoice.