Supplier Quick Reference Guide #2: **Credit Note**

There is a convenient way in Coupa Supplier Portal (CSP) to create a Credit Note:
You just need to select the invoice to be credited and **"flip" it into a Credit Note.** Please, see further details on this page.

This functionality is only available for invoices, which you have submitted electronically – so will not work for paper/PDF invoices.

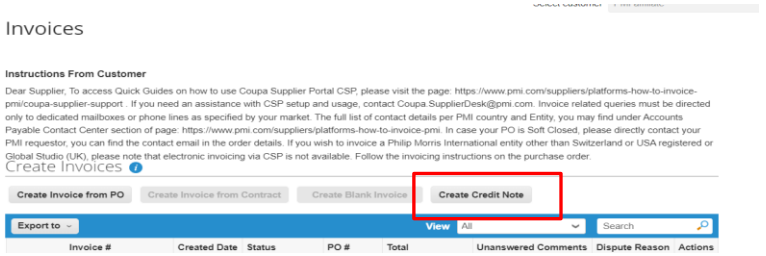
Credit Note principles

- Philip Morris International can process Credit Notes electronically. You have to create a **Credit Note for the total amount** to **fully offset** the corresponding Invoice.
- It is important to use proper **document type (Credit Note)**
  Invoices with negative total value can't be processed as Credit Notes.
- **Credit Note** has to **replicate the Invoice details completely** (type/number of lines, currency, PO references…).
- **Credit Note** can be associated only to **1 initial Invoice.**
- Credit Note must have **negative total value.**

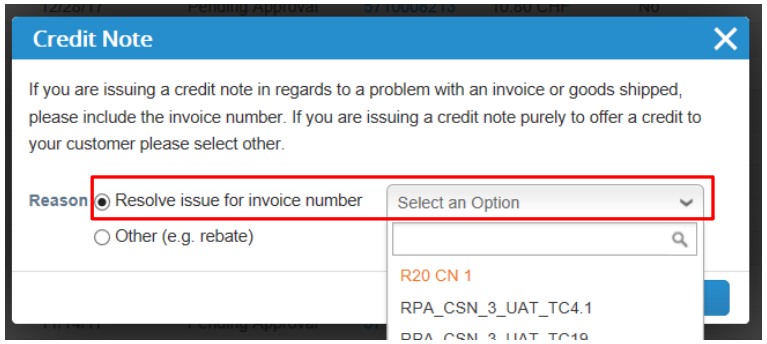
Flipping Invoice into a Credit Note (RECOMMENDED METHOD)

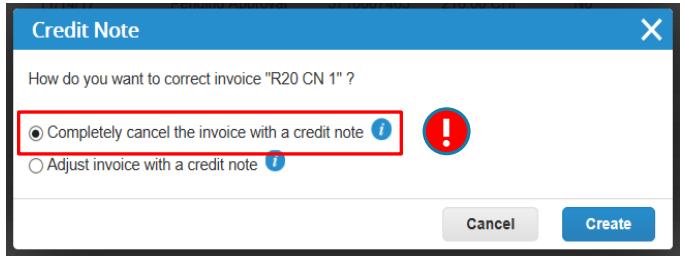
Login to your CSP account, go to **Invoices tab:**

1. Scroll to the bottom of the page and click "**Create Credit Note**" button



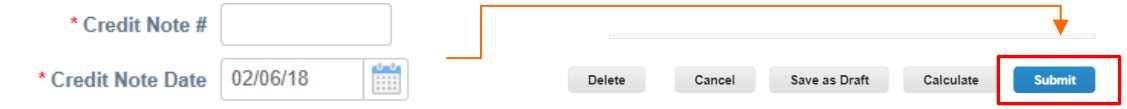
2. You will be prompted with a window to select a **Reason** for your Credit note. Please, select "**Resolve issue for invoice number**" option.
   Then, select the Invoice to be credited. You can start typing Invoice # to see shortened list of invoices. Do not select Other (e.g. rebate) option as PMI do not accept such credit documents.





3. On the next step it is important to select option "**Completely cancel the invoice with a credit note**", as PMI doesn't accept partial credit notes.

4. Then, as soon as you will be redirected to Credit note creation screen, populate **Credit note #** and **Credit note date**, then you can click **Submit**

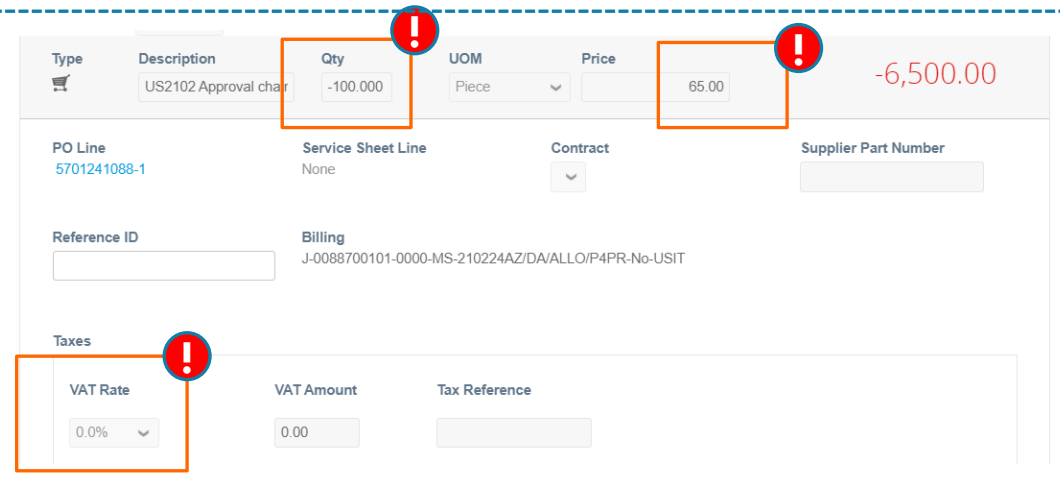


Supplier Quick Reference Guide #2: **Credit Note**

The alternative way of creating a Credit Note based on a PO details is still valid. Please, see the following instructions.

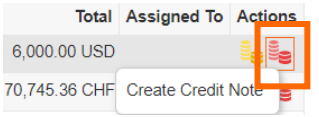
Credit Note principles

- Philip Morris International can process Credit Notes electronically. You have to create a **Credit Note for the total amount** to **fully offset** the corresponding Invoice.
- It is important to use proper **document type (Credit Note):** Invoices with negative total value can't be processed as Credit Notes.
- **Credit Note** has to **replicate the Invoice completely** (type/number of lines, currency, PO references…).
- **Credit Note** can be associated only to **1 initial Invoice.**
- Credit Note must have **negative total value.**



Creating a Credit Note

You need to go into the **Orders tab** and **click the icon** to create Credit Note



1. Type Credit Note Number, set the date.
2. Indicate initial Invoice # and Date

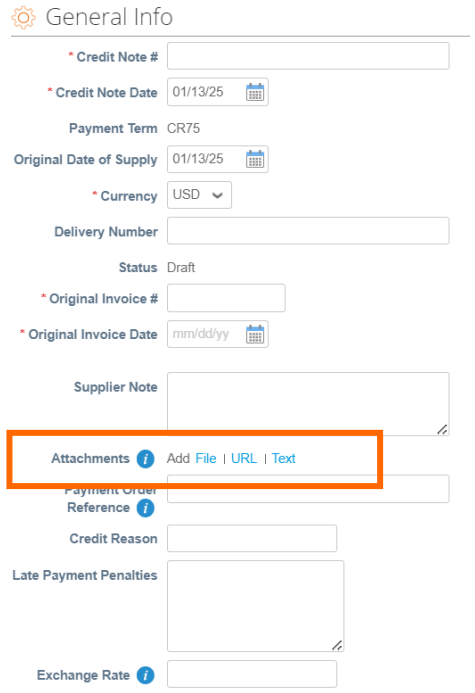
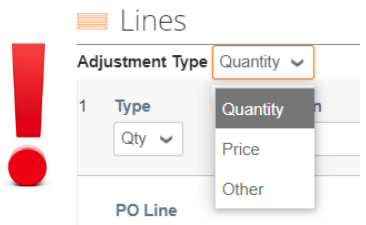
IMPORTANT:

The Total amount of the Credit Note **must be a negative value** in order to avoid errors in the system:

- If your invoice had Qty, then **Qty field value** in Credit Note should be **with "-"**, while **price should remain positive.**
- If your invoice has **only Price**, put **negative** value there.

3. Remember to use the same VAT rate as in initial invoice.
4. Do not attach PDF Credit Note as an attachment. PDF Credit Note will not be considered as legal in such cases

Don't send us any **duplicate** of electronic Credit Note **by paper or PDF**



When you are creating a credit note select Adjustment type **"Quantity"** or **"Price". Please do not use option "Other".**