

The KANTAR logo is displayed in a bold, white, sans-serif font. The letter 'K' is uniquely styled with a yellow-to-white gradient. The background of the slide features a complex, abstract geometric pattern of overlapping shapes in various shades of pink, magenta, and blue, creating a sense of depth and movement.

# How to Create Credit Notes in Coupa

There are two- ways of creating credit notes in Coupa:

- Through your Orders – see page 2
- Through your Invoices – see page 6

Coupa Supplier Enablement

# Create a Credit Note from Orders

1. Go to the tab Orders
2. If there are any POs created, they will appear, listed below.

POs can have the following status:

- Issued
- Soft Closed
- Closed
- Cancel

If the status is Issued, PO can be used to create an invoice

If any other of the status is displayed, please contact your Business Partner within Kantar, so they can provide a new PO.

The screenshot shows the Kantar system interface. The navigation menu at the top has the 'Orders' tab highlighted with a red box. Below the navigation, there is a 'Select Customer' dropdown menu showing 'Kantar - FEDEX EXPRESS UK TRANSPORT...'. The main content area is titled 'Purchase Orders' and contains 'Instructions From Customer' which states that Kantar operates a 'No PO No Pay' policy and provides a link for further guidance. Below the instructions is a button that says 'Click the Action to Invoice from a Purchase Order'. At the bottom, there is a table of purchase orders with the following data:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
40011009	2025-03-11	Issued	None	2 Each of fedex Courier charges test	No	324,000.00 GBP		

# Create a Credit Note from Orders

## Purchase Orders

### Instructions From Customer

Kantar operates a "No PO No Pay" policy. To ensure we can pay invoices, please verify your PO is correct. For further guidance on the Kantar PO process, please visit our Supplier Information web page, by copying and pasting the link here into your browser. Alternatively, please speak to your business contact. US/UK: <https://www.kantar.com/uki/campaigns/coupa-supplier-information-hub> NL: <https://www.kantar.com/nl/campaigns/coupa-supplier-informatie-nieuwe-leveranciers>

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
261014802	2024-10-21	Issued	None	Costs	No	10,000.00 EUR		
261007166	2022-12-21	Closed	None	NIPO Software	No	3,700,000.00 EUR		

1. Click on the red coins under **Actions** and it will open the screen to create the credit note.
2. Under **General Info**, fill in the **Credit Note #**, as per the number on your system
3. Please add the **Original Invoice Number** and **Original Invoice Date**
4. **Credit Reason** must be filled with the reason for the credit note
5. If you have a document (PDF) issued from your system, attach it under **Attachments, File**
6. Under **From**, all the Fields marked with a red \* should be filled

**General Info**

\* Credit Note #

Credit Note Date Set automatically at time of submission

Payment Term 30 DAYS, NET

Original Date of Supply 2025-07-30 

\* Currency EUR

Delivery Number

Status Draft

\* Original Invoice Number

\* Original Invoice Date yyyy-mm-dd 

Image Scan  No file chosen

Supplier Note

Attachments  Add File | URL | Text

Cash Accounting Scheme

\* Credit Reason

Margin Scheme

# Create a Credit Note from Orders

Your credit note number must be unique. If it has never been used, a green check will appear. If the number is repeated a red sign will appear.

Once this is all filled in, please scroll down to **Lines**.

Under **Lines**, you will see the **Description** and **Price**.

If the credit note is for the total amount of the PO, no change is needed. If it's partial, please change the amount under Price.

Fill in the **VAT Rate**, accordingly. VAT Rates will appear according to the country you are invoicing from.

General Info

\* Credit Note # ABCDEF 

General Info

\* Credit Note # 123456 

Lines

Type	Description	Price	
	Costs	10,000.00	10,000.00 

PO Line: 261014802-1 [Clear](#) Service Sheet Line: None Contract:  Supplier Part Number:

Withholding tax:  Late Fees:  USD  Billing: 261989800-KA287

Applicable for WHT relevant Spain suppliers Add the total amount that are incurred by late fees.

Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text"/>	0.00	<input type="text"/>

# Create a Credit note from Orders

The VAT Rate will be calculated based on the percentage and it's automatically displayed.

To make sure the amounts are the same on your credit note and Coupa, click Calculate.

If everything is correct, click Submit.

Not sure if it's correct and need more clarification? Click Save as Draft.

Invoice entered by mistake? Delete or Cancel.

Taxes

VAT Rate	VAT Amount	Tax Reference
21.0% ▼	2,100.00	<input type="text"/>

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

Totals & Taxes

Lines Net Total	10,000.00
Lines VAT Totals	2,100.00

Shipping

VAT  0.000

Tax Reference

Total VAT 2,100.00

Net Total 10,000.00

**Gross Total 12,100.00**

Delete Cancel Save as Draft **Calculate** Submit

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

Totals & Taxes

Lines Net Total	10,000.00
Lines VAT Totals	2,100.00

Shipping

VAT  0.000

Tax Reference

Total VAT 2,100.00

Net Total 10,000.00

**Gross Total 12,100.00**

Delete Cancel Save as Draft Calculate **Submit**

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

Totals & Taxes

Lines Net Total	10,000.00
Lines VAT Totals	2,100.00

Shipping

VAT  0.000

Tax Reference

Total VAT 2,100.00

Net Total 10,000.00

**Gross Total 12,100.00**

Delete Cancel **Save as Draft** Calculate Submit

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

Totals & Taxes

Lines Net Total	10,000.00
Lines VAT Totals	2,100.00

Shipping

VAT  0.000

Tax Reference

Total VAT 2,100.00

Net Total 10,000.00

**Gross Total 12,100.00**

Delete **Cancel** Save as Draft Calculate Submit

# Create a Credit Note from Invoices

1. Go to the tab Invoices
2. Go to “Create Credit Note”

In this case, no POs will be displayed, but it will open a screen with the following **Reason: Resolve issue for invoice number**: opens a drop-down list with the invoices that have been issued to Kantar and you can select the invoice you want to credit.

This option will credit the total amount of the invoice.

**Other (e.g. rebate)**: this option might not be available.

Select customer Kantar - FEDEX EXPRESS UK TR

## Invoices

### Instructions From Customer

Kantar is committed to paying all suppliers on time, every time. To allow us to process and pay your invoice to the agreed payment terms, please ensure all information entered is correct, and in line with the invoice requirements. Details of these requirements, as well as information on how to contact us for support, can be found on our Supplier Information web page. Please copy and paste the link here into your browser to access. Link: <https://www.kantar.com/uki/campaigns/coupa-supplier-information-hub>

### Create Invoices i

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

Create Invoices i

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

Export to   View All   Search

Invoice #	Created Date	Dispute Reason	Actions
None	2025-07-28		
None	2025-07-25		
None	2025-07-14		
None	2025-07-02		

### 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)

Cancel   Continue

# Create a Credit Note from Invoices

1. A yellow banner will appear informing that you are crediting a specific invoice.
2. Under **General Info**, fill in the **Credit Note #**, as per the number on your system.
3. **Original Invoice Number** and **Original Invoice Date** will be already filled.
4. **Credit Reason** must be filled with the reason for the credit note.
5. If you have a document (PDF) issued from your system, attach it under **Attachments, File**.
6. Under **From**, all the Fields marked with a red \* should be filled.

## Create Credit Note Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold. ✕

This credit note applies to invoice ABCFG. When approved, the credit will fully cancel the invoice's impact to the transaction.

### General Info

\* Credit Note #

Credit Note Date Set automatically at time of submission

Payment Term 30 DAYS, NET

Original Date of Supply 2024-11-11

\* Currency EUR

Delivery Number

Status Draft

Original Invoice Number ABCFG

Original Invoice Date 2024-11-11

Image Scan  No file chosen

Supplier Note

Attachments

Cash Accounting Scheme

Credit Reason

### From

\* Supplier Nipo Software B.V. - KQANNLGOP

\* Supplier VAT ID NL815269936B01

\* Invoice From Address NIPO Software BV  
Amsteldijk 166  
1079 LH Amsterdam  
Netherlands  
NL815269936B01

\* Remit-To Address NIPO Software BV  
Amsteldijk 166  
1079 LH Amsterdam  
Netherlands

Bank Name: BNP PARIBAS

Beneficiary Name: NIPO Software BV

IBAN: \*\*\*\*\*5155

SWIFT Code: \*\*\*\*NL2A

\* Ship From Address NIPO Software BV  
Amsteldijk 166  
1079 LH Amsterdam  
Netherlands

### To

# Create a Credit Note from Invoices

The credit number must be unique. If the invoice number was never used a green check will appear.

If the number is repeated a red sign will appear.

Please make sure, you are not invoicing twice the same invoice.

At this point, as the information is being picked up from the previous invoice, the field Lines will be completely greyed-out and no changes are possible.

General Info

\* Credit Note #  

General Info

\* Credit Note #  

Lines

Adjustment Type

Type	Description	Price	
<input type="text" value="Amt"/>	<input type="text" value="Costs with sample"/>	<input type="text" value="1,000.00"/>	1,000.00

PO Line:  Service Sheet Line:  Contract:  Supplier Part Number:

Withholding tax:  Late Fees:

Applicable for WHT relevant Spain suppliers Add the total amount that are incurred by late fees.

Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text" value="0.0%"/>	<input type="text" value="0.00"/>	<input type="text"/>

# Create a Credit note from Invoices

If everything is correct, click **Submit**.

Not sure if it is correct and need more clarification? Click **Save as Draft**.

Invoice entered by mistake? **Delete** or **Cancel**

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

Totals & Taxes	
Lines Net Total	10,000.00
Lines VAT Totals	2,100.00
Shipping <input type="text"/>	
VAT <input type="text"/>	0.000
Tax Reference <input type="text"/>	
Total VAT 2,100.00	
Net Total 10,000.00	
<b>Gross Total</b>	<b>12,100.00</b>

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)

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

Totals & Taxes	
Lines Net Total	10,000.00
Lines VAT Totals	2,100.00
Shipping <input type="text"/>	
VAT <input type="text"/>	0.000
Tax Reference <input type="text"/>	
Total VAT 2,100.00	
Net Total 10,000.00	
<b>Gross Total</b>	<b>12,100.00</b>

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)

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

Totals & Taxes	
Lines Net Total	10,000.00
Lines VAT Totals	2,100.00
Shipping <input type="text"/>	
VAT <input type="text"/>	0.000
Tax Reference <input type="text"/>	
Total VAT 2,100.00	
Net Total 10,000.00	
<b>Gross Total</b>	<b>12,100.00</b>

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)