Supplier Quick Reference Guide #2: Credit Note



Flipping Invoice into a Credit Note There is a convenient way in Coupa Supplier Portal (CSP) to Login to your CSP account, go to Invoices tab: Invoices You just need to select the invoice to be credited and "flip" it into a Credit Note. Please, see further details on this page. ear Supplier. To access Quick Guides on how to use Couna Supplier Portal CS upa-supplier-support . If you need an assistance with CSP setup and usage, contact Coupa.SupplierDesk@pmi.com. Invoice related queries must be dire 1. Scroll to the bottom of the page and ilboxes or phone lines as specified by your market. The full list of contact details per PMI country and Entity, you may find ayable Contact Center section of page: https://www.pmi.com/suppliers/platforms-how-to-invoice-pmi. In case your PO is Soft Closed, please directly contact click "Create Credit Note" button PMI requestor, you can find the contact email in the order details. If you wish to invoice a Philip Morris International entity other than Switzerland or USA regi This functionality is only available for invoices, which you have Global Studio (UK), please note that e icing via CSP is not available. Follow the invoicing instructions on the purchase or Create Credit Note submitted electronically – so will not work for paper/PDF 2. You will be prompted with a window to **Credit Note principles Credit Note** X select a **Reason** for your Credit note. Please, select "Resolve issue for invoice Philip Morris International can process Credit Notes electronically. You have to If you are issuing a credit note in regards to a problem with an invoice or goods shipped, number" option. please include the invoice number. If you are issuing a credit note purely to offer a credit to create a Credit Note for the total amount to fully offset the corresponding your customer please select other. Then, select the Invoice to be credited. You can start typing Invoice # to see Reason
Resolve issue for invoice number Select an Option It is important to use proper **document type** (Credit Note) shortened list of invoices. Do not select Other (e.g. rebate) Q Other (e.g. rebate) option as PMI do not Invoices with negative total value can't be processed as Credit Notes. R20 CN 1 accept such credit documents. RPA CSN 3 UAT TC4.1 **Credit Note** has to **replicate the Invoice details completely** (type/number of DDA CSN 3 LIAT TO19 lines, currency, PO references...). Credit Note Credit Note can be associated only to 1 initial Invoice. 3. On the next step it is important to select How do you want to correct invoice "R20 CN 1" ? option "Completely cancel the invoice Credit Note must have negative total value. Completely cancel the invoice with a credit note with a credit note", as PMI doesn't Adjust invoice with a credit note accept partial credit notes. Cancel Create 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

* Credit Note #							•
* Credit Note Date	02/06/18]	Delete	Cancel	Save as Draft	Calculate	Submit

Philip Morris International

create a Credit Note:

invoices.

Invoice.

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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**.



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 (if applicable)

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. <u>Do not attach</u> 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".

	Lines	
Ac	ljustment Type	Quantity 🐱
1	Туре	Quantity ¹
	Qty 🖌	Price
	POline	Other
	I O LINE	

	Creating	a Credit Note
into the Order	s tab and c	lick the icon

* Credit Note Date	01/13/25
Payment Term	CR75
Original Date of Supply	01/13/25
* Currency	USD 🗸
Delivery Number	
Status	Draft
* Original Invoice #	
* Original Invoice Date	mm/dd/yy
Supplier Note	
Attachments 🥡	Add File URL Text
Reference ()	
Credit Reason	
Late Payment Penalties	
Exchange Rate 🥡	
nent type	

Total Assigned To Actions

6,000.00 USD

🔅 General Info

Credit Note #

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