



ComfortDelGro • Procurement • Analytics • Sourcing • Supplier management

Guiding you through your purchases

Powered by  **coupa**

How to Transact – Invoicing in Coupa Supplier Portal (CSP)

Updated on 26 August 2022

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ComfortDelGro AP Contacts

For enquiries on invoicing and payment matters, please reach out to “Support Team” for assistance. If you do not receive any response from “Support Team” within 3 business days, please contact “AP Lead”.

Business Unit	Support Team (1 st level Support)	AP Lead (2 nd level Support)
<ul style="list-style-type: none"> SBS Transit Ltd SBS Transit Rail Pte. Ltd. 	sbs_ap@sbstransit.com.sg	Cheng Siew Ling chengsiewling@sbstransit.com.sg
<ul style="list-style-type: none"> ComfortDelgro Engineering Pte Ltd (CDGE) 	cdge_ap@cdge.com.sg	Julie Wong juliewong@comfortdelgro.com
<ul style="list-style-type: none"> JIC Inspection Services Pte Ltd Setsco Consultancy International Pte. Ltd. VICOM Inspection Centre Pte Ltd VICOM Ltd 	yanlingtoh@vicom.com.sg	Johnsy Rani johnsy@vicom.com.sg
<ul style="list-style-type: none"> Setsco Services Pte Ltd 	carinelim@vicom.com.sg	Johnsy Rani johnsy@vicom.com.sg
<ul style="list-style-type: none"> Other Business Units not listed above 	group_ap@comfortdelgro.com	Albert Goh Kim Soon ksgoh@comfortdelgro.com

Guidelines on Invoicing

Guidelines on Invoicing (1/3)

1. Only One (1) invoice number per invoice created
2. Partial invoicing per PO can be done
3. The maximum Invoice and Credit Note Number allowed is 16 characters



General Info

* Invoice # (Not More Than 16 Character)

4. Ensure to input the CORRECT tax rate. Please refer to the next slide on the different type of tax rates
5. Please refer to the general guidelines from [IRAS Website](#)
6. Only GST registered businesses are allowed to charge and collect GST on goods and services rendered.
Please select the relevant tax codes depending on the nature of goods and services supplied.
The commonly used tax codes are “7%”, “0.0%”, “Out-of-Scope”.
7. Non-GST registered businesses are NOT allowed to charge GST
Please select “Out-of-Scope” only for all goods and services.

Guidelines on Invoicing (2/2)

Types of Tax Rate	Used for	Reference
7%	Standard tax rate charged by all GST-registered businesses.	IRAS When to Charge Goods and Services Tax (GST)
7% - Customer Accounting	Local sale of prescribed goods (Mobile phones, memory cards and off-the-shelf software) whose GST-exclusive sale value exceeds S\$10K and is not an excepted supply.	IRAS Customer Accounting for Prescribed Goods
3.5%	Discounted sale price scheme for second hand or used vehicle.	IRAS Discounted Sale Price Scheme
Out-of-Scope	<ol style="list-style-type: none"> 1. Non GST Registered Business - Supplies need not be reported in GST return. 2. Supplies fall outside the scope of the GST Act (i.e: Sales of overseas goods, etc) 	IRAS Out of Scope Suppliers Frequently Asked Questions – Reverse Charge
0% Reverse Charge	Reverse Charge brings to tax Business-to-Business (B2B) supplies of imported services.	IRAS GST on Imported Services
0.0%	Providing international services and exporting of goods. (i.e: Air ticket, international calls, etc)	IRAS When to charge 0% GST (zero-rate)
Exempt	Financial services, supply of digital payment token, sale & lease of residential properties, import & local supply of investment precious metals.	IRAS Supplier Exempt from GST

! GST Rates effective 1 January 2023

- For any GST rate chargeable for supply before 1 January 2023, please continue to charge standard GST at 7%.
- Please do NOT charge or reflect GST at 8% on the invoices and payments that are issued or received before 1 Jan 2023.
- The relevant GST rate of Advance Payment Invoice is charged based on the date of full payment received.

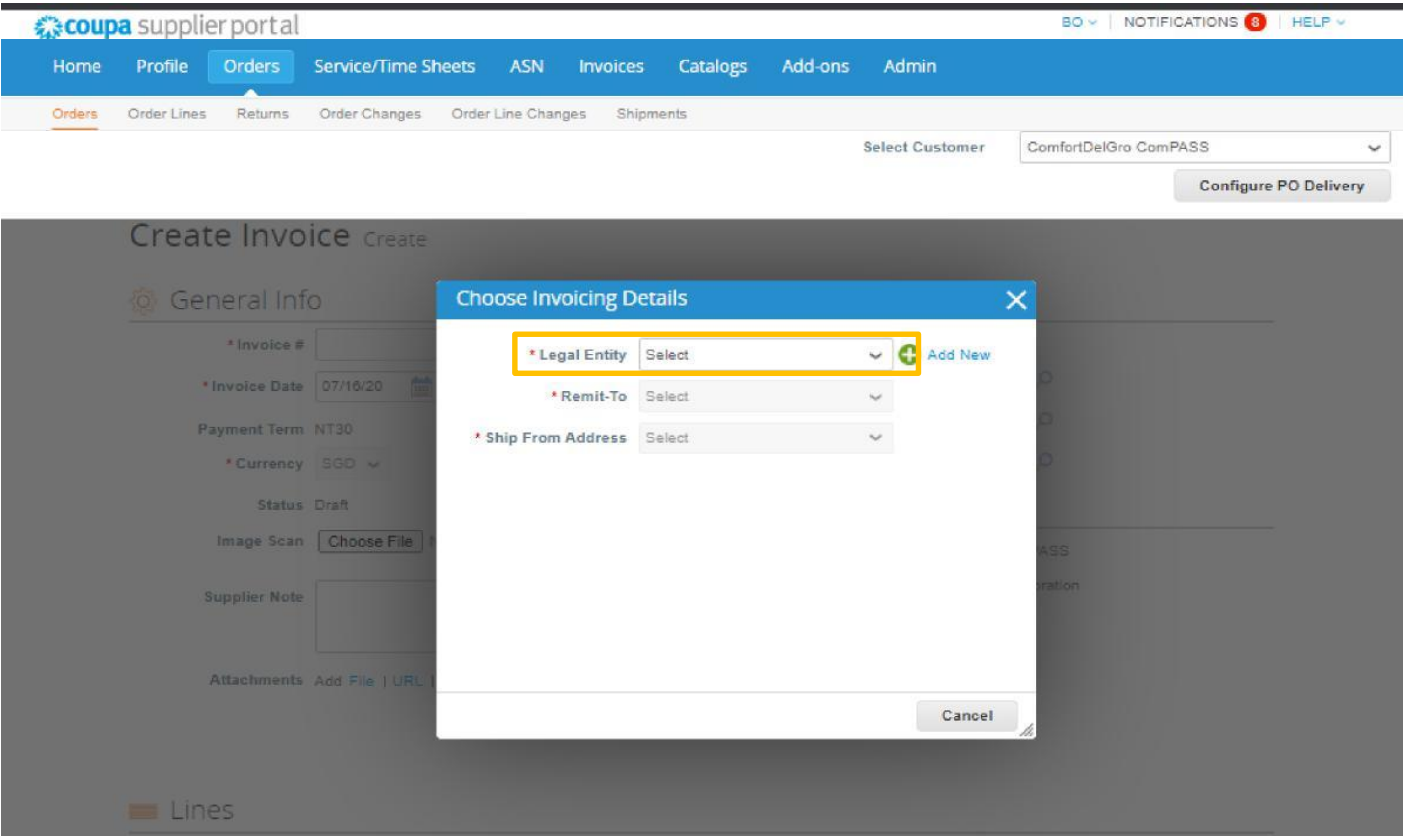
For more details, refer to [IRAS e-Tax Guide](#)

Setting up a legal entity from an invoice in CSP

(required for all invoicing methods)

Setting Up Legal Entity

Step 1: Whichever way you use to create your invoice in CSP, for the FIRST TIME invoice creation, you will be prompted by Coupa to click on icon to set up a new Legal Entity. If you have an existing legal entity in Coupa, please select the legal entity from the drop-down list selection.



Setting Up Legal Entity

Step 2: Follow the onscreen instructions

- Ensure that your legal entity name follows exactly your ACRA or business registration documents

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.

Cancel Continue

- Refer to the notes provided for address

Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All

ComfortDelGro ComPASS - FORMTEAM CONSULTANCY PTE. LTD.

ComfortDelGro ComPASS - STARHUB LTD

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR COMPLIANCE

The invoice From address will be included on invoices and is critical for compliance in some countries. If you have a simple company structure, you'll probably use this as your Remit-To and Ship From location as well. Otherwise, uncheck the boxes to provide a separate address for those.

Setting Up Legal Entity

Step 2: Follow the onscreen instructions

- Refer to the notes provided for Remit –To address

1 2 3 4

Which customers do you want to see this?

- All
- ComfortDelGro ComPASS - FORMTEAM CONSULTANCY PTE. LTD.
- ComfortDelGro ComPASS - STARHUB LTD

What address do you invoice from?

* Address Line 1 205 braddell road

Address Line 2

* City Singapore

State Singapore

* Postal Code 579701

Country Singapore

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

Uncheck box if your Remit-To Address is different than your legal entity, or you have more than one Remit-To location.

What is your Tax ID?



- Refer to the notes provided for Ship From Address

1 2 3 4

Which customers do you want to see this?

- All
- ComfortDelGro ComPASS - FORMTEAM CONSULTANCY PTE. LTD.
- ComfortDelGro ComPASS - STARHUB LTD

What address do you invoice from?

* Address Line 1 205 braddell road

Address Line 2

* City Singapore

State Singapore

* Postal Code 579701

Country Singapore

Use this address for Remit-To

Use this for Ship From address

REQUIRED FOR INVOICING

Uncheck box, if your Ship From Address is different than your legal entity, or you have more than one location. It's good practice to include this information on the invoice when the addresses are different. For many countries including this information is mandatory.

What is your Tax ID?

Setting Up Legal Entity

Step 2: Follow the onscreen instructions

- Tax - Not all legal entities require Tax ID information. If required, please follow the standard format

State Singapore

*Postal Code 579701

Country Singapore

Use this address for Remit-To

Use this for Ship From address

What is your Tax ID?

Country Singapore

*GST ID M12345678D

I don't have GST ID Number

Add additional Tax ID

Miscellaneous

Invoice From Code

Preferred Language English (Singapore)

Cancel Save & Continue

- For Payment Type field, select “Address”

Billing

Where do you want to receive payment?

1 2 3 4

* Payment Type Address

Address

Bank Account

Virtual Card

What is your Re

Address Line 1 205 braddell road

Address Line 2

City Singapore

State Singapore

Postal Code 579701

Country Singapore

Cancel Save & Continue

Cancel

Setting Up Legal Entity

Step 2: Follow the onscreen instructions

- Click "Next"

The screenshot shows a dialog box titled "Where do you want to receive payment?". It has a progress indicator with steps 1, 2, 3, and 4, where step 3 is highlighted. Below the progress indicator, there is a text block: "Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next." To the right of this text is an "Add Remit-To" button. Below this is a table with columns "Remit-To Account", "Remit-To Address", and "Status". The table contains one row with the following data: "Address" under "Remit-To Account", "205 braddell road Singapore Singapore 579701 Singapore" under "Remit-To Address", and "Active" under "Status". To the right of the table is a "Manage" button. At the bottom of the dialog, there are three buttons: "Deactivate Legal Entity" (red), "Cancel", and "Next" (blue and highlighted with a yellow border).



- Input Ship From Address

The screenshot shows a dialog box titled "Where do you ship goods from?". It has a progress indicator with steps 1, 2, 3, and 4, where step 4 is highlighted. Below the progress indicator, there is a text block: "What is your Ship From Address?". Below this text is a form with several input fields: "* Address Line 1", "Address Line 2", "City", "State", "* Postal Code", and "* Country". A yellow box highlights these input fields. To the right of the form is a text box: "What is the physical address that your goods are shipped from? This can be a warehouse address." Below the form is a section titled "Integration Information" with a sub-label "Code" and an input field.

Setting Up Legal Entity

Step 2: Follow the onscreen instructions

- Click “Done”

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status
No 1 Sun View Road Singapore Singapore 627888 Singapore	Active

Manage

Deactivate Legal Entity Done



- The screen goes back to the original invoice page.
- “Invoice From Address”, “Remit-To-Address” and “Ship From Address” are populated
- Continue to fill in all mandatory fields required of your invoice

Select Customer ComfortDelGro ComPASS - STARHUB LTD

Configure PO Delivery

Create Invoice

General Info From

* Invoice # 11111111

* Invoice Date 05/29/20

Payment Term NT15

Date of Supply 05/29/20

* Currency SGD

Delivery Number

Status Draft

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

* Supplier STARHUB LTD

* Supplier GST ID M12345678D

* Invoice From Address Testing Supplier Pte Ltd
205 braddell road
Singapore 579701
Singapore

* Remit-To Address Testing Supplier Pte Ltd
205 braddell road
Singapore 579701
Singapore

* Ship From Address Testing Supplier Pte Ltd
No 1 Sun View Road
Singapore 627888
Singapore

To

Customer ComfortDelGro ComPASS

* Bill To Address 205 Braddell Road
Singapore 579701

Chat with Us

Setting Up Legal Entity

Other features:

1. Add legal entity:

- Go to Setup → Legal Entity Setup → Add Legal Entity. You may create multiple Legal Entity for internal reference.

2. Deactivate Legal entity:

- You may deactivate any incorrect Legal Entity by clicking "Actions" → "Deactivate Legal Entity"

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right side of the navigation bar, there are links for 'AO', 'NOTIFICATIONS 99+', and 'HELP'. Below the navigation bar, there is a secondary navigation bar with links for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Setup' link is highlighted. Below the secondary navigation bar, there is a sub-navigation bar with links for 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' link is highlighted. The main content area is titled 'Admin Legal Entity Setup'. On the right side of the main content area, there is a button labeled 'Add Legal Entity'. Below the main content area, there is a table with the following structure:





Legal Entity	
▼ ZZZ PTE LTD	Actions ▼ Manage Legal Entity Manage Remit-To Accounts Deactivate Legal Entity
▼ XXX PTE LTD	

Create a PO-Backed Invoice

Method 1: Create a PO-backed Invoice (1/5)

- In your CSP, go to “Orders” Tab
- Click on Create Invoice icon (📄) for the PO which you want to create an 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 'Select Customer' dropdown menu set to 'ComfortDelGro COMPASS - AOCOUPA PTE LTI' and a 'Configure PO Delivery' button. The main content area is titled 'Purchase Orders' and contains an 'Instructions From Customer' section with the text: 'Please acknowledge the PO upon receipt. Please contact @requestor for any questions regarding this order.' Below this is a message: 'Click the 📄 Action to Accept the Purchase Order and Create an Invoice using its data'. 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 blue arrow points to the 'Create Invoice' icon (📄) in the 'Actions' column.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CDG0000001393	07/09/20	Issued	None	121 Each of papaya	No	1,210.00 SGD		
DTL0000001385	07/08/20	Issued	None	5 Each of oranges	No	35,000.00 SGD		
SBST0000001383	07/08/20	Issued	None	14 Carton of Apple	No	65.80 SGD		
CBPL0000001344	07/08/20	Issued	None	1 Carton of Apple	No	4.70 SGD		

Method 2: Create a PO-backed Invoice (2/5)

- Click into the PO number link

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

Order lines Returns Order Changes Order Line Changes Deliveries

You have 1 customer announcements related to Orders (ComfortDelGro ComPASS) [View All Announcements](#)

Select Customer

Purchase Orders

Instructions From Customer
Please acknowledge the PO upon receipt. Please contact @requestor for any questions regarding this order.

Click the Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Action
CDG0000003780	29/7/22	Issued	14/8/22	1 Each of test1 1 Each of test3 1 Each of test4 1 Each of test2	No	47.24 SGD		
CDG0000003779	29/7/22	Issued	None	1 Each of test1 1 Each of test3 1 Each of test4 1 Each of test2	No	47.24 SGD		
CZIG0000003767	4/7/22	Issued	None	15 Each of lights	No	300.00 SGD		
CZIG0000003766	4/7/22	Issued	None	15 Each of lights	No	300.00 SGD		
CZIG0000003765	4/7/22	Issued	None	15 Each of lights	No	300.00 SGD		
CZIG0000003764	4/7/22	Issued	None	15 Each of lights	No	300.00 SGD		
CZIG0000003763	27/8/22	Issued	None	15 Each of lights	No	300.00 SGD		

Create Invoice Save Print View

- In the PO, click on "Create Invoice"

Select Customer

Purchase Order #CZIG0000003767

General Info

Status Issued - Pending Manual
Order Date 4/7/22
Revision Date 4/7/22
Requester Siew Lay Chua
Email siewlay@comfortdelgro.com
Payment Term NT30
Attachments None
Acknowledged
Assigned to

Shipping

Ship-To Address 205 Braddell Road
Singapore 579701
Singapore
Location Code: CDG Venture
Attn: Siew Lay Chua
Terms DDP

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	lights	15	Each	20.00	300.00	300.00

Need By 4/7/22 Part Number 1111111 Manufacturer Name None Manufacturer Part Number None Ship To None Advance Payment No Advance Payment Advance Payment Amount None

Consignment None

Per page 15 | 45 | 90

Total SGD 300.00

Create Invoice Save Print View

- Fill in all mandatory information

• Coupa will check for duplicate invoice number by supplier.

• Please attach copy of signed delivery order (if available)

Create Invoice Create

General Info

* Invoice # (Not More Than 16 Character) ✓

* Invoice Date

Payment Term

Date of Supply

* Currency

Delivery Number

Status

Image Scan No file chosen

Supplier Note

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

From

* Supplier

Supplier Tax Number

* Invoice-From Address
205 Cantonment Road
Singapore 085101
Singapore

* Remit-To Address
205 Cantonment Road
Singapore 085101
Singapore

* Ship-From Address
205 Cantonment Road
Singapore 085101
Singapore

To

Customer

Create an Invoice from PO (4/5)

- Input Quantity
- Select Tax Rate for each line items

Lines

Type	Description	Qty	UOM	Price	
	lights	3	Each	20.00	0.00

PO Line: CZIG0000003767-1

Contract:

Supplier part number: 1111111

Advance Payment: No Advance Payment

Advance Payment Amount: None

Billing: CZIG Comp-Management office Dept-ZIGM001 CC-OPEX ExpType-Repairs & Maintenance PGL-434200 R&M Equip & Fittings GL

Taxes

GST Rate	GST Amount
<input type="text" value="7.0%"/>	0.00

7.0%
7.0% - Customer Accounting
3.5%
0.0%
Exempt
Reverse Charge
Out of Scope

Total Taxes

- Click on “Calculate” for the system to work out the correct totals
- Check your invoice before clicking on “Submit”

Total Taxes	
Lines Net Total	60.00
Lines GST Totals	4.20
<hr/>	
Total GST	4.20
Net Total	60.00
Gross Total	64.20

Buttons: Delete, Cancel, Save as draft, **Calculate**, **Submit**



- Coupa will prompt you for confirmation to submit
- Click on “Send Invoice”

Are you ready to send?

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.

Buttons: Continue Editing, **Send Invoice**

Create a Contract-Backed Invoiced

Create a Contract-Backed Invoice (1/3)

! Restricted user. If you have a contract with CDG, please approach the Contract Manager to turn this option on for you.

- In your CSP, go to “Invoices” Tab
- Click on “Create Invoice from Contract button”

- Select the contract that you are invoicing against and click on “Create”

coupa supplier portal

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

Invoices Invoices Lines Payment Receipts

You have 1 customer announcements related to Invoices (ComfortDelGro ComPASS) [View All Announcements](#)

Select Customer: ComfortDelGro ComPASS - GIL Pte Ltd

Invoices

Instructions From Customer

For help desk contact information details: □ SBST and DTL: SBS_AP@sbstransit.com.sg □ CDGE: CDGE_AP@cdge.com.sg □ Other BU: GROUP_AP@comfordelgro.com

Create Invoices ⓘ

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

Export to View All Search

Invoice # (not more than 16 character)	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
DuplicateAdv_CO	6/8/22	Approved	CDG0000003573	100.00 SGD	No		
CN_GIL	6/8/22	Pending Approval	CDG0000003573	-100.00 SGD	No		



Select Contract

DuplicateAdv_CF	6/8/22	Approved	CDG0000003573	100.00 SGD	No		
None	29/7/22	Draft	None	0.00 SGD	No		
None	29/7/22						
None	29/7/22						
None	29/7/22						
None	29/7/22						
None	29/7/22						
None	29/7/22						
None	29/7/22						
GST test case 2	29/7/22						

Comprehensive Maintenance of ECS at 16 DTL MRT Stations & ESS (TQ20T4005(DTL-A1))

Supply of Fruits (exceeded value)

Cancel Create

Create a Contract-Backed Invoice (2/3)

- Fill in the mandatory fields
- Attached a signed delivery order (if applicable)

- At each line, key in the first word for the item inside the contract
- When the correct item is suggested, contracted pricing will be populated
- Select Tax Rate for each line item

Create Invoice Create

General Info From

* Invoice # (Not More Than 16 Character) ✓

* Invoice Date

Payment Term

Date of Supply

* Currency

Delivery Number

Status

Image Scan No file chosen

Supplier Note

Attachments | |

* Supplier

Supplier Tax Number

* Invoice-From Address

* Remit-To Address

* Ship-From Address

To

Customer

* Bill-To Address

Buyer GST ID

Ship To Address

* Customer Employee Name

Please ensure that the invoice number is not more than 16 characters



Lines

Type	Description	Qty	UOM	Price
Qty	<input type="text" value="in"/> <input type="text" value="Injector Assy.B9TI Eu5"/>	<input type="text" value="1.000"/>	<input type="text" value="Barrel"/>	<input type="text" value="0.00"/>

PO Line

Supplier Part Number

Taxes

GST Rate	GST Amount
<input type="text"/>	<input type="text"/>

Totals & Taxes

Create a Contract-Backed Invoice (3/3)

- Click on “Calculate” for the system to work out the correct totals
- Check your invoice before clicking on “Submit”

Total Taxes	
Lines Net Total	60.00
Lines GST Totals	4.20
<hr/>	
Total GST	4.20
Net Total	60.00
Gross Total	64.20

Buttons: Delete, Cancel, Save as draft, **Calculate**, **Submit**



- Coupa will prompt you for confirmation to submit
- Click on “Send Invoice”

Are you ready to send?

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.

Buttons: Continue Editing, **Send Invoice**

Create a Blank Invoice

Create a Blank Invoice (1/3)

! Restricted used, upon approval of CDG AP Team

- i. By default, all purchases are to be supported by a PO from CDG
- ii. To request, write in to the CDG AP contacts listed in slide 3
- iii. Upon review and approval, CDG AP will inform ComPASS Supplier Support to turn on this function

- In your CSP, go to “Invoices” Tab
- Click on “Create Blank Invoice”

coupa supplier portal

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

Invoices Invoices Lines Payment Receipts

You have 1 customer announcements related to Invoices (ComfortDelGro ComPASS) [View All Announcements](#)

Select Customer ComfortDelGro ComPASS - GIL Pte

Invoices

Instructions From Customer

For help desk contact information details: SBST and DTL: SBS_AP@sbstransit.com.sg CDGE: CDGE_AP@cdge.com.sg Other BU: GROUP_AP@comfortdelgro.com

Create Invoices [?](#)

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

Export to View All Search

Invoice # (not more than 16 character)	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
None	20/8/22	Draft	None	0.00 SGD	No		✎ ✖
None	20/8/22	Draft	None	0.00 SGD	No		✎ ✖

Create a Blank Invoice (2/3)

- Fill in the mandatory fields
- Attached a signed delivery order (if applicable)

- Input item description, quantity, unit of measure (UOM) and price
- Select Tax Rate for each line item

Create Invoice Create

General Info

* Invoice # (Not More Than 16 Character)

* Invoice Date

Payment Term

Date of Supply

* Currency

Delivery Number

Status

Image Scan No file chosen

Supplier Note

Attachments | |

From

* Supplier

Supplier Tax Number

* Invoice-From Address

* Remit-To Address

* Ship-From Address

To

Customer

* Bill-To Address

Buyer GST ID

Ship To Address

Customer Employee Name

Please ensure that the invoice number is not more than 16 characters



Lines

Type	Description	Qty	UOM	Price	
Qty	Training Services	1.000	Days	1000	0.00

PO Line Contract

Supplier part number

Advance Payment

Advance Payment Amount

Taxes

GST Rate	GST Amount
<input type="text" value="7.0%"/>	<input type="text" value="0.000"/>

Total Taxes

Create a Blank Invoice (3/3)

- Click on “Calculate” for the system to work out the correct totals
- Check your invoice before clicking on “Submit”

Total Taxes

Lines Net Total	1,000.00
Lines GST Totals	70.00
<hr/>	
Total GST	70.00
Net Total	1,000.00
Gross Total	1,070.00



- Coupa will prompt you for confirmation to submit
- Click on “Send Invoice”

Contract Supplier part number Advance Pay

Are you ready to send? X

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.

ent office Dept-ZIGM001 CC-OPEX Exp Type-Repairs & Maintenance PGL-434200 Equip & Parts GL

Invoice Dispute Resolution

Invoice Status: “Approved” → Supplier need to raise Credit Note (CN)

Type (A) : Resolve a Dispute = For cancellation of approved invoice

Go to: “Create Credit Note” → Select “Resolve Issue for Invoice” → Enter the invoice number → Select “Completely cancel the invoice a Credit Note” → Click on “Create” → Continue

Type (B) : Record a Credit = For rebates

Go to: “Create Credit Note” → Select “Other (e.g: Rebate)” → Click on “Continue”

Invoice Status: “Disputed” → Supplier need to re-submit the invoice

- CDG Requestor is able to reject and dispute the invoice before approval.
- When the invoice status is “Disputed”, please re-submit a new invoice without issuing Credit Note.

Common issue to take note:

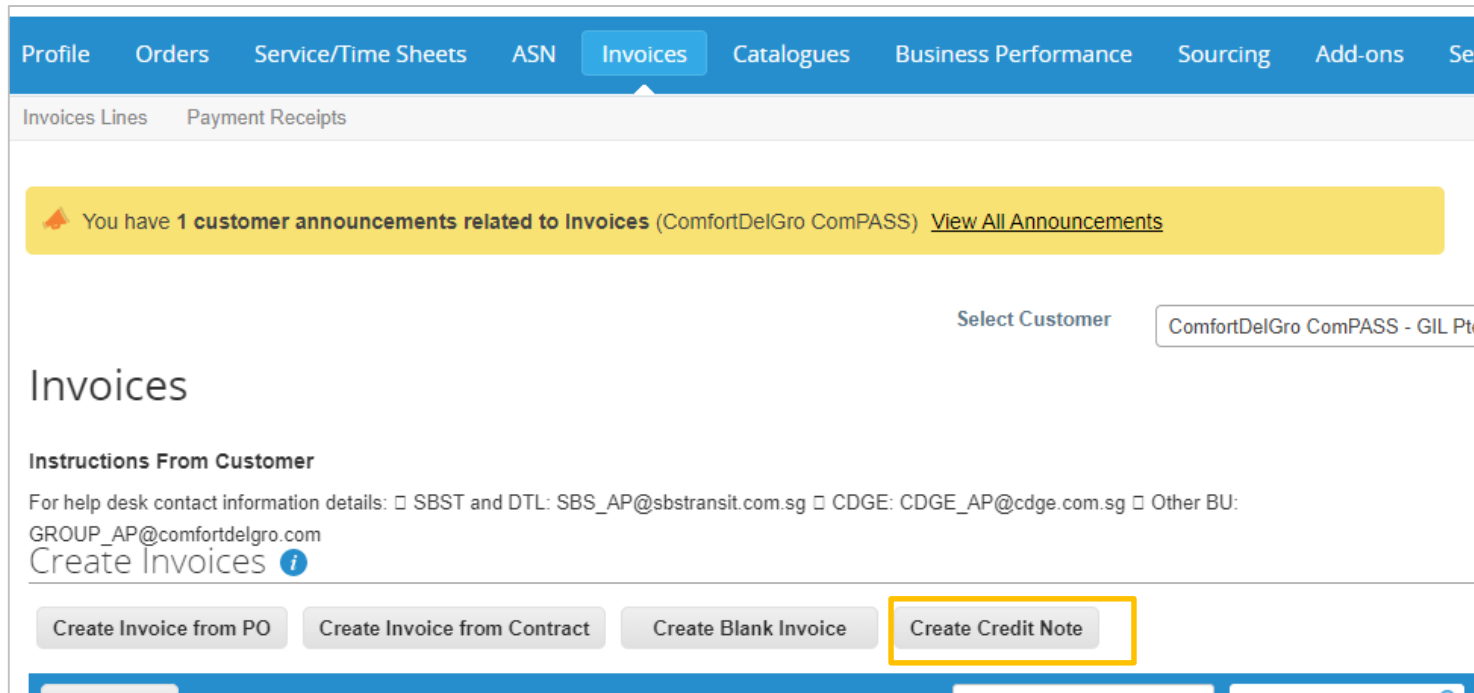
1. Supplier has created a Credit Note but it is in “draft” status and hence unable to create a “new” Credit Note.
2. Credit Note is in “pending approval” status and hence unable to proceed to re-issue a “new” invoice.
3. Credit Note can only be created when supplier logs in to Coupa Supplier Portal.

You can issue a credit note to:

- Resolve a dispute on an invoice
- Record a miscellaneous credit, e.g. return/cancellation of goods, price adjustment, rebates and refunds

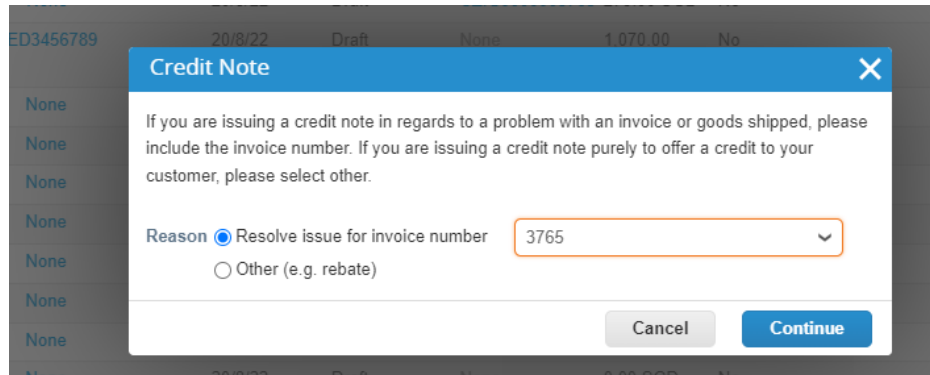
How to create a credit note?

- **Create** credit note is similar to create an invoice. For more information, refer to the article [Edit Invoice](#)
- Go to “Invoice” Tab
- Click on “Create Credit Note”



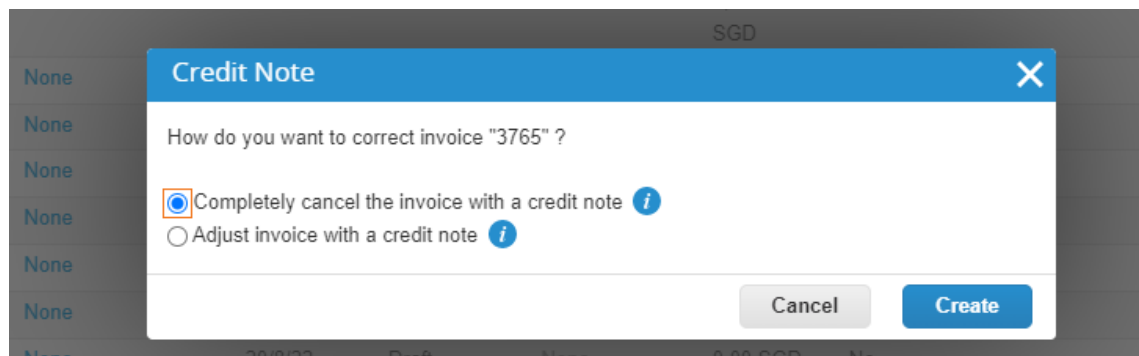
The screenshot shows the 'Invoices' section of a web application. The top navigation bar includes 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted), 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Set'. Below the navigation, there are tabs for 'Invoices Lines' and 'Payment Receipts'. A yellow notification banner states: 'You have 1 customer announcements related to Invoices (ComfortDelGro ComPASS) [View All Announcements](#)'. A 'Select Customer' dropdown menu is set to 'ComfortDelGro ComPASS - GIL Pte'. The main heading is 'Invoices'. Underneath, there is a section titled 'Instructions From Customer' with contact details: 'For help desk contact information details: □ SBST and DTL: SBS_AP@sbstransit.com.sg □ CDGE: CDGE_AP@cdge.com.sg □ Other BU: GROUP_AP@comfortdelgro.com'. Below this, there is a 'Create Invoices' link with an information icon. At the bottom, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note' (which is highlighted with a yellow box).

- If the credit note is related to a problem with an invoice or the goods shipped, select the **Resolve issue for invoice number** radio button and, from the drop-down list, select the invoice number. Click **Continue** to select how you want to resolve the issue.



The screenshot shows a 'Credit Note' dialog box with a blue header and a close button (X). The main text reads: "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, there are two radio button options under the heading "Reason": "Resolve issue for invoice number" (which is selected) and "Other (e.g. rebate)". A dropdown menu next to the selected option shows the value "3765". At the bottom of the dialog are "Cancel" and "Continue" buttons.

- You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it.
- Only quantity or price can be reduced through partial credit notes.
- For more information, read [Disputed invoices](#).



The screenshot shows the same 'Credit Note' dialog box, but now it asks "How do you want to correct invoice '3765' ?". There are two radio button options: "Completely cancel the invoice with a credit note" (which is selected) and "Adjust invoice with a credit note". Both options have an information icon (i) next to them. At the bottom of the dialog are "Cancel" and "Create" buttons.

Invoice status – “Approved”: Create a Credit Note - Record a Credit

- If the credit note is not related to a dispute, select “Other”
- If a contract is available, you can also select it from the drop-down list. Otherwise, click “Continue”

7/1/22 Approved CZ15000003765 -300.00 SGD No

Credit Note

Reason Resolve issue for invoice number
 Other (e.g. rebate)

Select a Contract (If applicable)

Cancel Continue

More Resources in CSP

For more information on Invoicing, you may look up Coupa Guides posted in their website below:

https://success.coupa.com/Suppliers/For_Suppliers/Core/Invoices or contact supplier@coupa.com if you encounter difficulties in using the system.

Watch a training video by Coupa:

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Additional_Resources/CSP_Videos#Invoices

thank you!