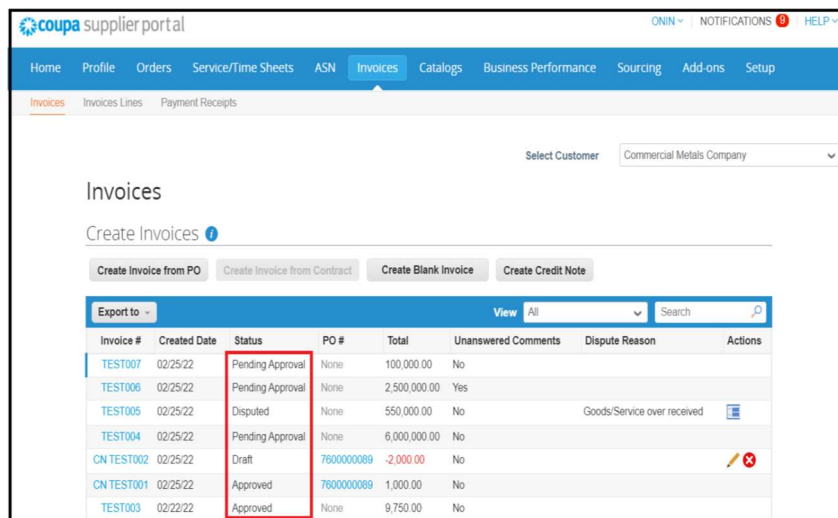


Quick Reference Guide – Checking Credit Status

How To Check Credit Status

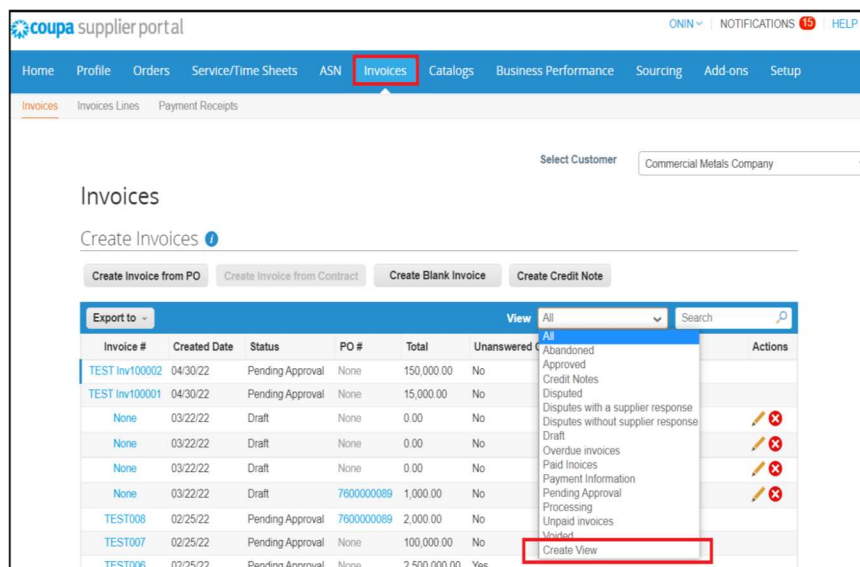
1. To view all credits

- a. Click Invoices Tab
 - i. Status of each invoice/credit is displayed.
- b. The view can also be changed to view credits only
 - i. Click the View dropdown menu
 - ii. Select Credit Notes



2. Create a View to see paid status.

- a. Click Create View on the View dropdown.



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- b. Enter the name of the report.
- c. Add condition: Paid = Yes
- d. Drag the information that you need in your report.
 - i. Then, click Save

Create New data table view

General

Name

Visibility Only Me Everyone

Editable by all

Start with view

Conditions

Match Conditions

Filter By is

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Total
Disputed Date	<input style="border: 2px solid red;" type="text" value="Paid"/>

- e. Paid credits and invoices are displayed.

Invoices

Create Invoices i

Export to View Search

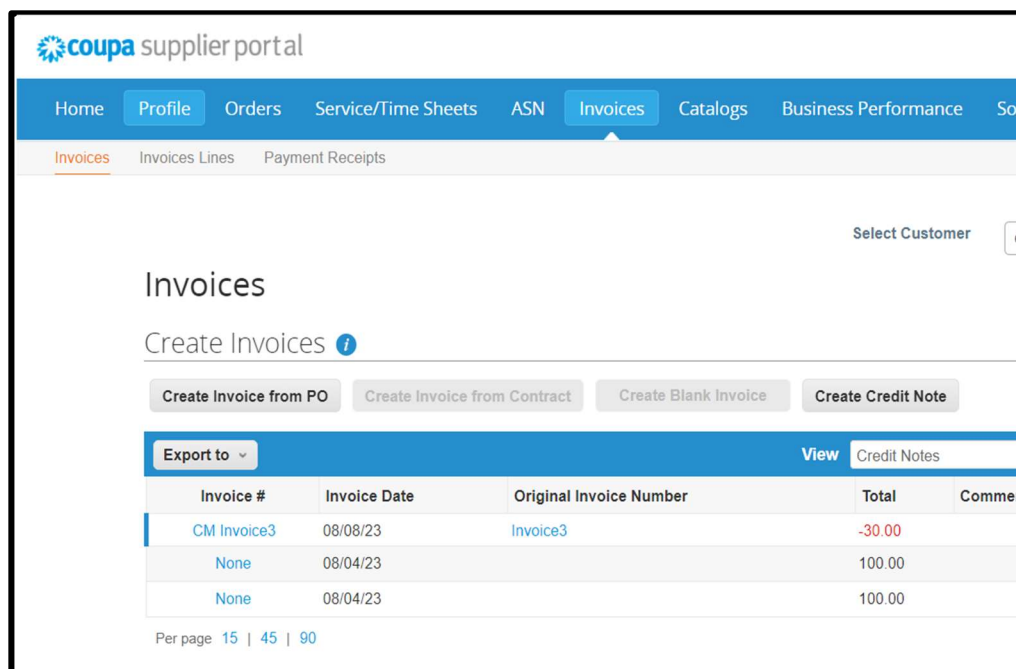
Invoice #	Created Date	Status	PO #	Total	Paid	Actions
TEST002	02/22/22	Approved	760000089	1,000.00	Yes	
TEST001	02/22/22	Approved	760000089	1,000.00	Yes	

Quick Reference Guide – Checking Credit Status

How To Check Credit Status

3. To check Credit Status detail

- a. Click on the credit under Invoice #.

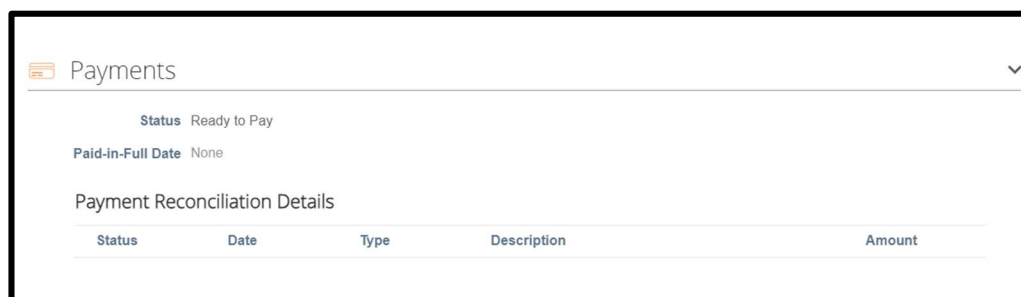


The screenshot shows the 'coupa supplier portal' interface. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Solutions'. Below the navigation bar, there are tabs for 'Invoices', 'Invoices Lines', and 'Payment Receipts'. The main content area is titled 'Invoices' and includes a 'Select Customer' dropdown. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is displayed with the following data:

Invoice #	Invoice Date	Original Invoice Number	Total	Comment
CM Invoice3	08/08/23	Invoice3	-30.00	
None	08/04/23		100.00	
None	08/04/23		100.00	

At the bottom of the table, it says 'Per page 15 | 45 | 90'.

- b. Scroll to the Payment section of the Credit Memo
- c. Click drop down arrow.



The screenshot shows the 'Payments' section of the Coupa Supplier Portal. The status is 'Ready to Pay' and the 'Paid-in-Full Date' is 'None'. Below this, there is a 'Payment Reconciliation Details' table with the following columns: Status, Date, Type, Description, and Amount.

Status	Date	Type	Description	Amount