

The Financial Times

Coupa Supplier Portal User Guide

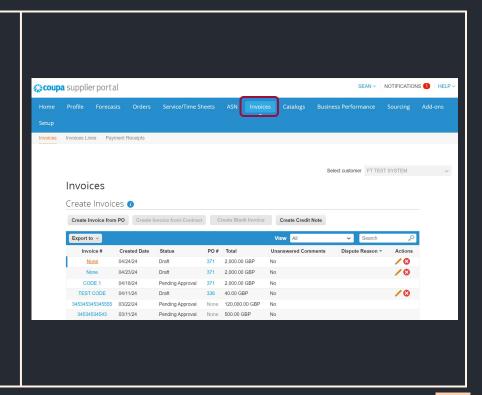


Credit Notes



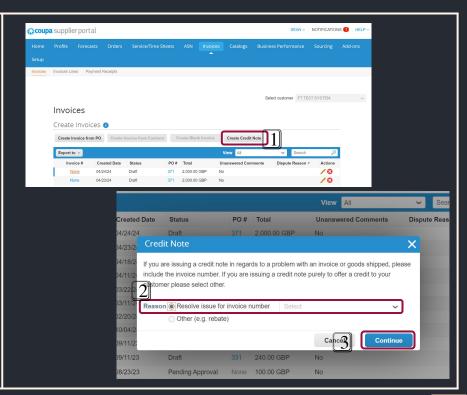
Step 1:

In the CSP, navigate to the **Invoices** tab from the top toolbar. Ensure you have selected 'FT Group' as your customer group.



Step 2:

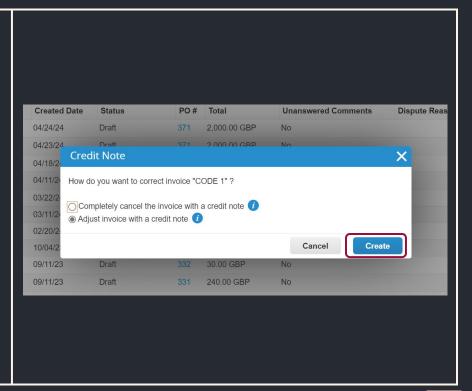
- 1: Select **Create Credit Note**, which will open up a pop up window.
- 2: Select **Resolve issue for invoice number** and then search or select the invoice number you want to raise a credit note for.
- 3: Once you have found the invoice you want to create a credit note for, select **Continue**.





Step 3:

The next pop up window will ask if you want to cancel the invoice or adjust the invoice with a credit note. Once you have selected the options you want to complete, select **Create**.

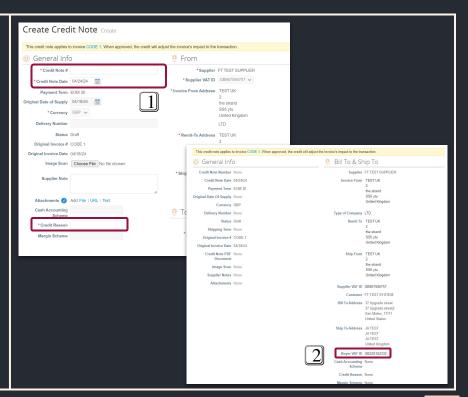


Step 4:

The Create Credit Note screen is now displayed.

1: In the General Info section, the mandatory fields to complete are Credit Note #, Credit Note Date and Credit Reason.

2: Ensure the Buyer VAT ID is correct.



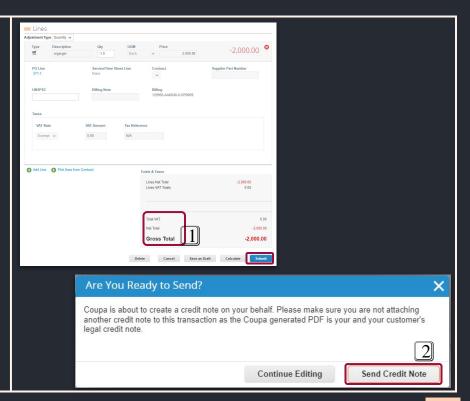


Step 5:

Scroll down to the complete the Lines section. The credit note has brought through lines from the invoice and created a credit note.

1: Check that the **Total VAT**, **Net Total and Gross Total** details are correct. If all is correct, select **Submit**.

2: A pop up window will confirm if you are ready to send, you can **Continue Editing** or select **Send Credit Note** to complete.

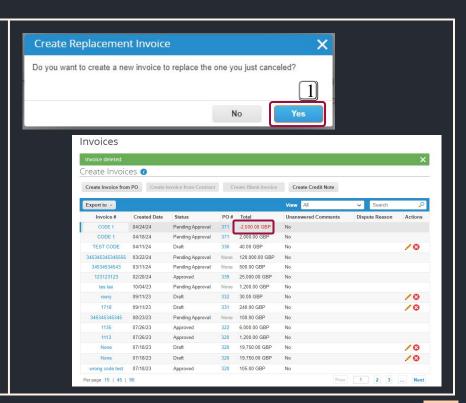




Step 6:

You will proceed to the **Create Replacement Invoice** pop up window with the option to create a replacement invoice.

- 1: By selecting **Yes**, you will be taken to the invoice creation screen. Follow the instructions on *How to Submit Invoices in the CSP*.
- 2: If you select **No** you are taken back to the invoices screen. You will see the credit note you have created appears at the top of the list.





Further help and support

If you are unable to find answers to your questions within these guides you can refer to:

- FT Supplier Webpage, which includes FAQs and other supporting information: aboutus.ft.com/suppliers
- You can contact our Procure-to-Pay Operations team at p2p@ft.com

Or if you require technical assistance with Coupa you can refer to:

- <u>Coupa Supplier Help Centre</u>
- <u>Coupa Compass</u> Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the 'Getting started with the CSP' guide from Coupa
- From the CSP homepage you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

Glossary of Terms

| CSP | Coupa Supplier Portal |
|----------------------------------|--|
| Admin | The person with Administration rights for the Coupa Supplier Portal for your account |
| Financial Times business contact | The Financial Times employee you have been discussing supply of goods and/or services |
| РО | Purchase Order |
| Users | Your employees who have access to the Coupa Supplier Portal |
| Invitation | There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date="">. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.</insert> |
| Coupa Compass | This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help |
| Supplier Information Form | This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP |