

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
 - NOTIFICATIONS 9 HELP ONIN ~ Coupa supplier portal Commercial Metals Company Invoices Create Invoices () Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note Export to ~ View Al Invoice # Created Date Status PO# Total Unanswered Comments Dispute Reason Actions TEST007 02/25/22 100.000.00 No Pending Approv TEST006 02/25/22 2,500,000.00 Yes Pending Approv None TEST005 02/25/22 550,000.00 No 1 Disputed Goods/Service over received TEST004 02/25/22 6,000,000.00 No Pending Approv None CN TEST002 02/25/22 Draft 760000089 -2,000.00 No 10 CN TEST001 02/25/22 1,000.00 No 760000 TEST003 02/22/22 9,750.00 No
 - ii. Select Credit Notes

- 2. Create a View to see paid status.
 - a. Click Create View on the View dropdown.

ူcoup	a supplier por	tal						ONIN	 NOTIFIC 	ATIONS 15	HELP ~
Home	Profile Order	s Service/1	ime Sheets A	SN Invoic	es Catalo	gs Busine	ss Performance	Sourcing	Add-ons	Setup	
Invoices	Invoices Lines P	ayment Receipts		<u>^</u>							
							Select Customer	Commercia	al Metals Comp	anv	
	Invoices										
	Create Invo	oices 🕖									
	Create Invoice f	rom PO Cre	ate Invoice from Co	ontract C	Create Blank Inv	oice Cre	ate Credit Note				
	Export to ~					View	All	✔ Se	arch	P	
	Invoice #	Created Date	Status	PO#	Total	Unanswered	Abandoned		A	ctions	
	TEST Inv100002	04/30/22	Pending Approval	None	150,000.00	No	Approved Credit Notes				
	TEST Inv100001	04/30/22	Pending Approval	None	15,000.00	No	Disputed				
	None	03/22/22	Draft	None	0.00	No	Disputes with a su Disputes without s	upplier response	e 🏑	0	
	None	03/22/22	Draft	None	0.00	No	Draft Overdue invoices		1	0	
	None	03/22/22	Draft	None	0.00	No	Paid Inoices		1	0	
	None	03/22/22	Draft	760000089	1,000.00	No	Payment Informati Pending Approval	on		0	
	TEST008	02/25/22	Pending Approval	760000089	2,000.00	No	Processing Unpaid invoices				
	TEST007	02/25/22	Pending Approval	None	100,000.00	No 🔽	Voided		-		
	TEST006	02/25/22	Pending Approval	None	2.500.000.00	Yes	Create View				



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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 Paid Invoices Visibility Only Me Image: Ima								
Conditions	Conditions							
Match Conditions Image: Conditions Filter By Paid Image: Conditions								
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	Commented Invoice #							
Comments	Comments Created Date							
Date Of Supply	Date Of Supply Status							
Date Of Supply	PO#							
Delivery Number	Delivery Number Total							
Disputed Date	Disputed Date Paid							

e. Paid credits and invoices are displayed.

Invoices							
Create Invoi	ces 🕖						
Create Invoice fro	Om PO Create Invoice	from Contract Cre	ate Blank Invoice	Create Credit Note			
Export to ~			Vie	w Paid Invoices	~ 🖊 💈	Search	P
Export to ~ Invoice #	Created Date	Status	Vie PO #	w Paid Invoices Total	∽ 🖌 🤮	Search Actions	P
Export to ~ Invoice # TEST002	Created Date	Status Approved	Viet PO # 760000089	W Paid Invoices Total 1,000.00	Paid Yes	Search Actions	<u>,</u> 2



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3. To check Credit Status detail

a. Click on the credit under Invoice #.

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Home	Profile Orders	Service/Time Sheets	ASN Invoices	s Catalogs	Busines	s Performano	ce Sou
Invoices	Invoices Lines Pay	ment Receipts					
						Select Custon	mer (
	Invoices						
	Create Invoid	ces 🥡					
	Create Invoice from	m PO Create Invoice from	n Contract Cre	eate Blank Invoice	Crea	te Credit Note	
	Export to ~				View	Credit Notes	
	Invoice #	Invoice Date	Original Invoice N	umber		Total	Commer
	CM Invoice3	08/08/23	Invoice3			-30.00	
	None	08/04/23				100.00	
	None	08/04/23				100.00	
	Per page 15 45	90					

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

Payments				~		
Status Ready to Pay Paid-in-Full Date None						
Status	Date	Туре	Description	Amount		