



TOGETHER
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TOMORROW

HOW TO RESOLVE A DISPUTED INVOICE

Description

This course explains the process of resolving and updating an invoice that has been disputed by your customer.

Objectives

After completing this course, you will be able to:

1. Access a disputed invoice
2. Resolve a dispute by cancelling an invoice
3. Resolve a disputed invoice by adjusting an invoice
4. Understand the different invoice statuses on Coupa

How to Resolve a Disputed Invoice


If the invoice is incorrectly captured e.g. Invoice lines are different from PO lines Distell Accounts payable will Dispute the invoice prompting you to resolve the dispute.

Navigation:


1 You will receive an email notifying you that your invoice has been disputed and the reason for the dispute .

The email notification will be sent to the person who had created the invoice.

2 Click '**View Online**' to login to the Coupa Supplier Portal and view the invoice being disputed.


TEST
DISTELL

Invoice #Inv 2967 is in dispute

Powered by 

Hi,

1 Invoice Inv 2967 has been disputed by Distell.

Dispute Reason(s)

- One or more of the invoice lines UOM differs from corresponding PO line's UOM

Date: 2020-08-17

Additional Comments: None

This invoice is available on the [Coupa Supplier Portal](#) to view and resolve. Resolving the disputed invoice would mean you are creating a corrected invoice. The corrected invoice can be submitted to Distell for review.

Resolving the disputed invoice links the corrected, and the disputed invoices. Unless you resolve the disputed invoice, Distell can choose to withdraw it from this status.

If you are a supplier using Coupa Invoicing in European countries, please note that to cancel an invoice you must first create and submit a credit note. If the prior invoice is canceled, you can create and submit a new invoice with a different number.

This process is recommended to comply with tax laws across all European countries, so that you do not expose yourself or your customer to any unnecessary risk as the invoice is corrected.

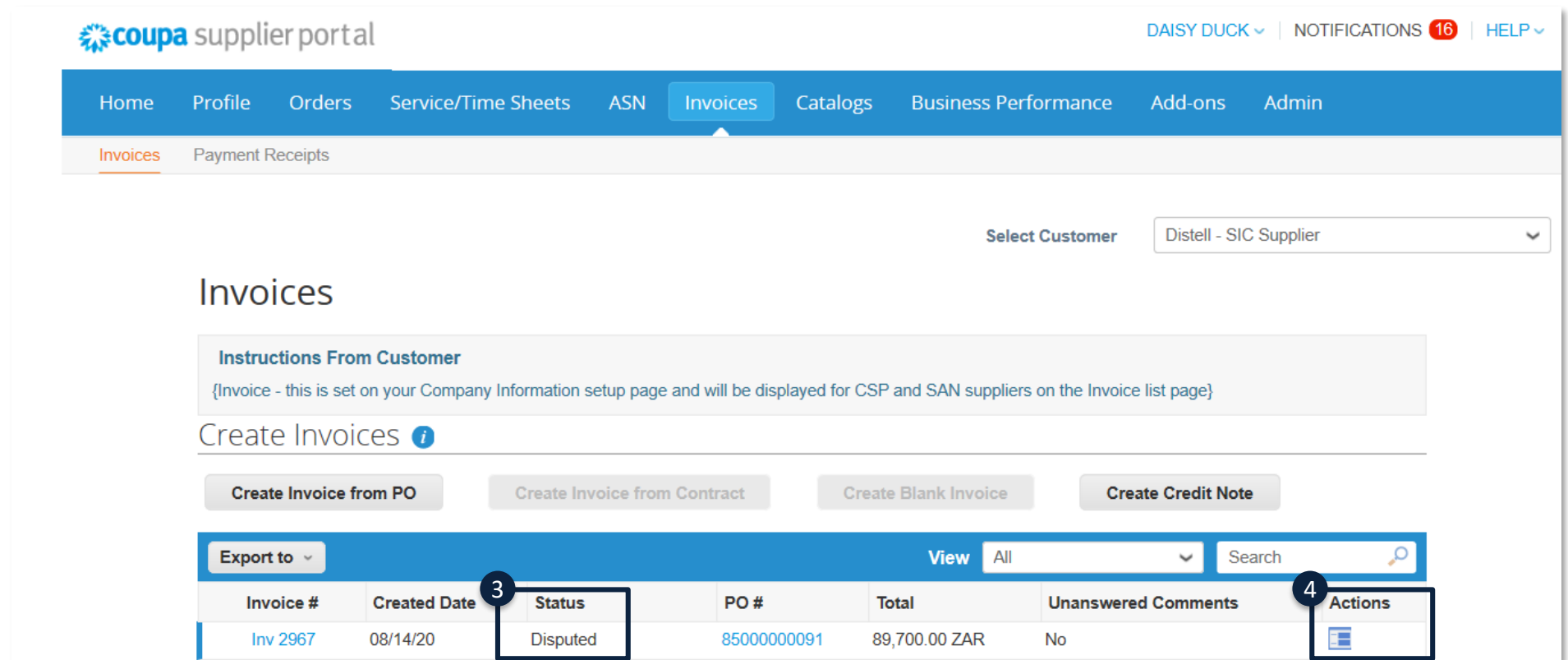
2 [View Online](#)

How to Resolve a Disputed Invoice

Once you have accessed the invoices tab on the CSP follow the below steps to resolve the dispute:

Navigation:

- 3 The status of the invoice will be **'Disputed'**.
You can filter for all your Disputed invoices by changing the View to reflect all Disputed Invoices.
- 4 Click on **'Resolve'**, under **'Actions'** to resolve the disputed invoice.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogs, Business Performance, Add-ons, and Admin. Below this, there's a sub-navigation bar with 'Invoices' and 'Payment Receipts'. On the right, there's a 'Select Customer' dropdown menu showing 'Distell - SIC Supplier'. The main heading is 'Invoices'. Below it, there's a section 'Instructions From Customer' with a placeholder text. Underneath, there's a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. At the bottom, there's a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row shows an invoice with ID 'Inv 2967', created on '08/14/20', with a status of 'Disputed', PO # '85000000091', and a total of '89,700.00 ZAR'. The 'Status' column is circled with a '3' and the 'Actions' column is circled with a '4'.

coupa supplier portal

DAISY DUCK | NOTIFICATIONS 16 | HELP

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Add-ons Admin

Invoices Payment Receipts

Select Customer Distell - SIC Supplier

Invoices

Instructions From Customer
{Invoice - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices ⓘ

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

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
Inv 2967	08/14/20	Disputed	85000000091	89,700.00 ZAR	No	

How to Resolve a Disputed Invoice

There are 2 options to resolve a disputed invoice.

Navigation:

- 5 The 'Cancel invoice' option allows you to resolve the disputed invoice by cancelling it.
- 6 The 'Adjust' option allows you to make adjustments to the invoice e.g. edit the Qty and Amount.

Invoice #Inv 2967 [Back](#)

Select Customer

Distell - SIC Supplier

Please review the invoice and determine the resolution option:

Cancel Invoice

If this invoice was issued in duplicate, or if you require to amend non price or quantity information on this invoice, please cancel the invoice by choosing this option. We will guide you through a cancellation credit note and a replacement invoice creation.

Adjust

If you need to fix the price and/or quantity on this invoice choose this option. You would be required to choose the credit line adjustment type to denote if you are attempting to issue credit to reduce quantity, reduce price or issue an amount based credit.

Total VAT	11,700.00
Net Total	78,000.00
Gross Total	89,700.00

5

Cancel Invoice

6

Adjust

How to Resolve a Disputed Invoice

Cancelling a disputed invoice:

Navigation:

- 1 To resolve the dispute by cancelling click on 'Cancel Invoice' button.
- 2 Populate the **Credit Note** details to cancel the disputed invoice.
- 3 Once the credit note details have been populated click 'Submit' to send the credit note to Distell Accounts payable.

Totals & Taxes

Lines Net Total			78,000.00
Lines VAT Totals	VAT	15%	11,700.00
<hr/>			
Shipping			0.00
Handling			0.00
Misc			0.00
<hr/>			
Total VAT			11,700.00
Net Total			78,000.00
Gross Total			89,700.00

1 **Cancel Invoice** Adjust

Gross Total -89,700.00


Delete Cancel Save as Draft Calculate 3 **Submit**

Create Credit Note Create


This credit note applies to invoice [Inv 2967](#). When approved, the credit will fully ca


2 General Info

* Credit Note #

* Credit Note Date 08/17/20 

Payment Term

Original Date of Supply 08/13/20 

* Currency  ZAR

Delivery Number


Status Draft

Original Invoice # Inv 2967

Original Invoice Date 08/13/20

Image Scan

Supplier Note

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

* Credit Reason

How to Resolve a Disputed Invoice

Adjusting a disputed invoice:

Navigation:

- 1 To resolve the dispute by adjusting an invoice click on the 'Adjust' button.
- 2 Populate the **Credit Note** details to cancel the disputed invoice .

Totals & Taxes

Lines Net Total			78,000.00
Lines VAT Totals	VAT	15%	11,700.00
<hr/>			
Shipping			0.00
Handling			0.00
Misc			0.00
<hr/>			
Total VAT			11,700.00
Net Total			78,000.00
Gross Total			89,700.00

Cancel Invoice

Adjust

Create Credit Note Create

This credit note applies to invoice [Inv 2967](#). When approved, the credit will fully ca

General Info

* Credit Note #

* Credit Note Date 08/17/20 

Payment Term

Original Date of Supply 08/13/20 

* Currency  ZAR

Delivery Number

Status Draft

Original Invoice # Inv 2967

Original Invoice Date 08/13/20

Image Scan

Supplier Note

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

* Credit Reason

How to Resolve a Disputed Invoice

Adjusting a disputed invoice.

Navigation:

- 1

Select the 'Adjustment type' you want to edit .
If you click on adjustment type (e.g. Quantity) you need to edit the quantity in the QTY box.
- 2

Once you have made the adjustments click on 'Calculate' to update the invoice amount and to cancel the disputed invoice .
- 3

Once the credit note details have been populated click 'Submit' to send the credit note to Distell Accounts Payable.

Lines



Adjustment Type

1

Quantity

Price


Other

Type	Qty	UOM	Price	
 Cleaning chemicals	-12.0	Each	6,500.00	-78,000.00 

PO Line

85000000091-1

Contract



Supplier Part Number

Billing Notes

Billing

K-N/A-N/A-N/A-N/A-525AAUA-241000

Taxes

Delete

Cancel

Save as Draft

2

Calculate

3

Submit



TOGETHER
TOWARDS
TOMORROW

INVOICE STATUSES

Invoices can have the following statuses:

Status	Description
Abandoned	The disputed invoice has been abandoned. Your customer can choose to notify you of this invoice status change and provide instructions. You can set notification preferences for abandoned invoices.
Approved	The invoice has been accepted for payment by your customer.
Disputed	The invoice has been disputed. Invoices with disputed status are invoices with information that your customer does not agree to, needs clarification on, or finds incorrect.
Draft	The invoice has been created, but it has not been submitted to your customer yet.
Invalid	Specific for compliant e-invoices for clearance countries (for e.g.: Mexico). It indicates that a CFDI (Mexican legal invoice form) that you sent failed validation. Invoices with this status are visible only to you, not to your customer.
Pending Approval	The invoice is currently under review by your customer.
Processing	The invoice is being processed by the AP department and should be paid soon.
Voided	Something is wrong with the invoice. Contact your customer to get the invoice back on track.