

Creating a Blank Invoice

Navigation

1. To login you will need your email address and password, once logged in you will need to select **Invoices** from the toolbar across the top
2. Click **Create Blank Invoice**, this will automatically take you into the blank invoice screen where you will need to complete the following information.




Filling out the Invoice

General Info

1. Invoice Number - Must be entered. (Highlighted in Yellow)
2. Invoice Date - will automatically populate to the date of entry. (Highlighted in Yellow)
3. Payment Terms -will automatically populate from the PO
4. Currency - will default to GBP. (Highlighted in Yellow)
5. Delivery number - Please enter the delivery number here
6. Image Scan - Add any Delivery note images
7. Supplier Note - Please add any notes here (17 Digit Charge Code)
8. Attachments - Attach any files associated here

Create Invoice Create

General Info

* Invoice #	<input type="text"/>
* Invoice Date	06/09/2021 
Payment Term	30 0% 30
* Currency	GBP 
Delivery Number	<input type="text"/>
Status	Draft
Image Scan	<input type="button" value="Choose File"/> No file chosen
Supplier Note	<input type="text"/>
Attachments 	Add File URL Text
Cash Accounting Scheme	<input type="text"/>
Margin Scheme	<input type="text"/>

From
The address will only automatically populate if the invoice was created from a Purchase Order that has been produced, you will need to select the correct address for this invoice by clicking on the Magnifying Glass in this section.

To
Here you will need to provide the following information:

1. Bill -To-Address
2. Buyer VAT ID - This will be populated by selecting the 'Bill-To-Address' please deselect this by selecting the blank and then reselect the code populated previously. This will ensure the correct tax codes are populated within the invoice lines section.
3. Ship To Address
4. Requester Email (JLP Contact)
5. Requester Name
6. Tax Point Date (This date can not be future dated)



To

Customer John Lewis Partnership

* Bill-To Address No address selected

* Buyer VAT ID

Ship To Address No address selected

* Requester Email

* Requester Name

Dissection

Debit Note No

Rebate No

* Tax Point Date

True Payment Due Date None

ESD None

VAT Only Invoice No

Lines

Here you will need to provide the following information:

1. Description
2. Qty
3. Price

Taxes Section

VAT Rate = Use the drop down to select the correct % or EXEMPT, REVERSE CHARGE or OUT OF SCOPE. *Remember you may only charge VAT if you are VAT registered.*

The VAT amount will automatically be calculated, you will not be able to amend this field.

Tax reference = Your VAT registration number.

'Add Lines', 'Pick lines from PO' & '*Pick lines from Contract - Please do not use this option*' - Use these options if you wish to add invoice lines.

Lines

Type Qty ▾	Description <input type="text"/>	Qty 1.00	UOM Amount ▾	Price <input type="text" value="0.00"/>	0.00 ✖		
PO Line None Clear	Contract ▾	Supplier part number <input type="text"/>	Case (size) <input type="text"/>	Case (Qty) <input type="text"/>	Catalog Item No	CIS Line Type None	Service From Date <input type="text" value="dd/mm/yyyy"/>
Service To Date <input type="text" value="dd/mm/yyyy"/>	Taxes						
VAT Rate ▾	VAT Amount 0.00	Tax Reference <input type="text"/>					

Finalising the Invoice

Click **Calculate** and check the values are correct as per what you are expecting to invoice.

Click **Submit**, you will get the following warning - '*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.*' Any other warnings will detail any errors with the invoice.

Click **Send Invoice**, you will return to your invoice homepage where you will see the invoice as a status of 'Processing'. You can use this screen to see the status of all your invoices too.