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Creating a Credit Note

PLEASE DO NOT USE THE RED COINS IN THE ORDERS SCREEN AS THIS WILL NOT CANCEL OR ADJUST YOUR INVOICE VALUE

Select Customer | John Lewis Partnership ▾ |

Purchase Orders

Instructions From Customer

Please note that Purchase Order & Invoice functionality is not yet live, but will be enabled later in 2021

Click the 🪙 Action to Invoice from a Purchase Order

Export to ⌄					View	All ⌄	Search 🔍
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
JL⋮	04/20/22	Issued	None	10 i	No	20.00 GBP		🪙 🔴 ✖

Navigation

1. Login to Coupa Supplier Portal and select **Invoices** from the toolbar across the top.
2. Click **Create Credit Note**, then a message will appear, requesting the reason as to why a credit note is being created. You will be able to select the invoice number or another reason as to why you are creating a credit note. Please only select 'Resolve issue for invoice number'

Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ⦿ Resolve issue for invoice number | PO TEST #1 ▾ |

       ○ Other (e.g. rebate)

[Cancel]   [**Continue**]

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3. Once you have selected your reasoning or invoice you will then be asked the following question to choose the option you wish.

Credit Note

How do you want to correct invoice "PO TEST #1" ?

◉ Completely cancel the invoice with a credit note ⓘ
○ Adjust invoice with a credit note ⓘ

Cancel   **Create**

General Information

Fill in the details of the credit
   1. Credit Note Number
   2. Credit Reason = Enter reason here.
   3. Invoice Description - Please add any notes here (17 Digit Charge Code if the credit is against a PO)
   4. Attachments - Attach any files associated here

Create Credit Note Create

This credit note applies to invoice **PO TEST #1**. When approved, the credit will ful

⚙ General Info

* Credit Note #	Credit 1 ✓
* Credit Note Date	02/22/22
Payment Term	10 0.3%|10
* Currency	GBP ▾
Delivery Number	▮▮▮▮
Status	Draft
Original Invoice #	PO TEST #1
Original Invoice Date	12/01/21
Image Scan	Choose File No file chosen
Invoice Description	301.0000.00000.XXXXX
Attachments ⓘ	Add File | URL | Text
Cash Accounting Scheme	
* Credit Reason	Error
Margin Scheme	

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From
These will all automatically populate the original invoice details.

To
These will all automatically populate the original invoice details.
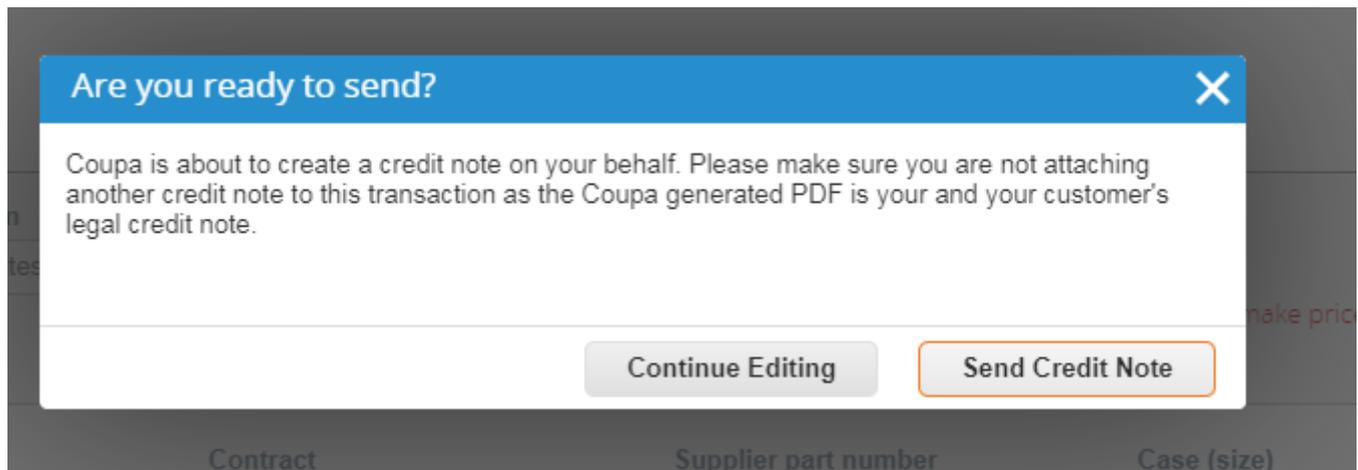
Tax Point Date - Will pre populate with the original invoice date

Lines
Following information is required
1. Description - Same as original Invoice
2. Quantity - Must be a minus
3. Price - Same as original Invoice
4. Vat Rate - Same as original Invoice

Then you will need to click Calculate, Submit, then the following warning message will appear.

Click Send Credit Note if happy to proceed and submit.

For any Credits that are not PO backed - A warning message from John Lewis Partnership will appear regarding your 17 digit charge code. If you are happy you have added all the relevant information then please click Submit.

Once that has been completed you will return to the homepage.