

## Creating a Credit Note

### 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 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** [X]

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  Other (e.g. rebate) [Select]

[Cancel] [Continue]

8/2021 Draft JLD0000000081 1,000.00 GBP No

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

**Credit Note** [X]

How do you want to correct invoice "SupplierGuideTest2" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*





[Cancel] [Create]

## General Information

- Fill in the details of the credit

1. Credit Note Number
2. Original Invoice Number
3. Original Invoice Date = (Initials)
4. Credit Reason = Enter reason here.
5. Tax Point Date = Same date as Credit Note date
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

### General Info

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

**From**

These will all automatically populate the original address but if you have more than one address with us, please use the magnifying glass to select your other address.


**To**

The following information is required.


1. Bill-To-Address - Selected via Magnifying Glass
2. Buyer VAT ID
3. Ship To Address - Select via Magnifying Glass
4. Requester Email (JLP Contact)
5. Requester Name
6. Tax Point Date - Same as Credit note date

 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

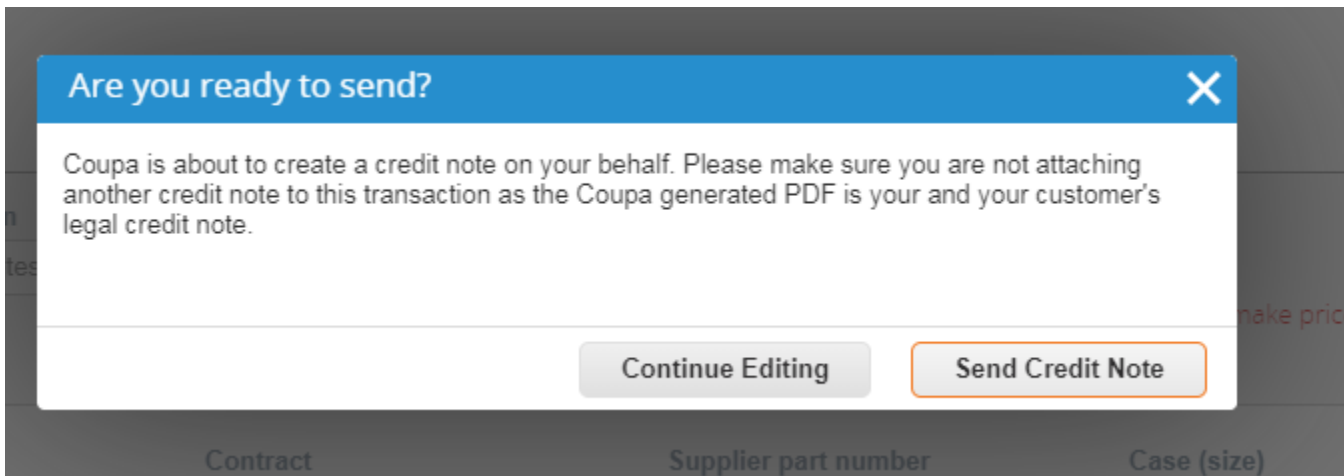
VAT Only Invoice No

**Lines**

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.

Then a warning message from John Lewis Partnership will appear regarding your 17 digit charge code. If you are happy with this then please click Submit. Once that has been completed you will return to the homepage.

