Creating a GFR Credit Note on Coupa

IMPORTANT: 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

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

Step 1 - Login to Coupa Supplier Portal and select **Invoices** from the toolbar across the top.

Step 2 - Click **Create Credit Note**. 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 [70A ▾]
◯ Other (e.g. rebate)

[Cancel] [**Continue**]

Step 3 - Once you have selected your invoice (or another reason) you will then be asked the following question to choose the option you wish. Select the appropriate option and click **Create**

Credit Note ✕

How do you want to correct invoice "70A" ?

⦿ 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

Credit Note Number - This must be a unique number and not the same as one previously used on any invoices or credit notes which you have submitted to us on Coupa or Oracle iSupplier.

Credit Reason - Enter credit note reason here.

Create Credit Note Create

This credit note applies to invoice 70A. When approved, the credit will fully cancel

⚙ General Info

* Credit Note #	70AC ✔
* Credit Note Date	16/06/2023 📅
Payment Term	1M 2.5%|25
* Currency	GBP ▾
Delivery Number	
Status	Draft
Original Invoice Number	70A
Original Invoice Date	15/06/2023
Image Scan	Choose File No file chosen
Invoice Description	
Attachments ℹ	Add File	URL	Text
Cash Accounting Scheme	
* Credit Reason	VAT Tax Error
Margin Scheme	

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

PO Invoice Lines - Following information is required:
1.   **Description** - Must remain same as original Invoice.
2.   **Quantity** - Must be a minus
3.   **Price** - Must remain same as original Invoice.
4.   **Vat Rate** - Must remain same as original Invoice.

Then you will need to click Calculate, Submit, then the following warning message will appear.
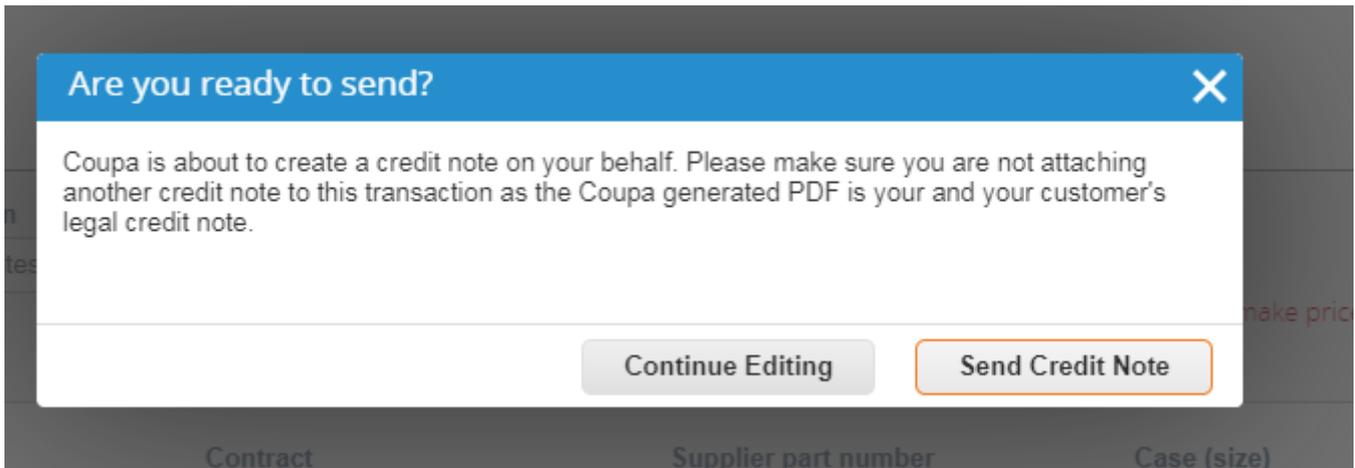
Click **Send Credit Note** if happy to proceed and submit. Your credit note will now be submitted to make amendments to the original invoice.

Once completed, the message '**Create Replacement Invoice'** will appear.

Important: You will not be able to create a replacement GFR invoice by following this option. Instead, select **No** and submit a replacement invoice by the original method.

● Follow our '**Converting a GFR PO into an Invoice on Coupa**' guide, found here, to submit your replacement invoice if you are a UK based supplier to John Lewis.
● If you are an overseas export supplier to John Lewis you will need to follow our **'Converting a GFR PO into an Invoice (Overseas Supplier)'** guide, found here.
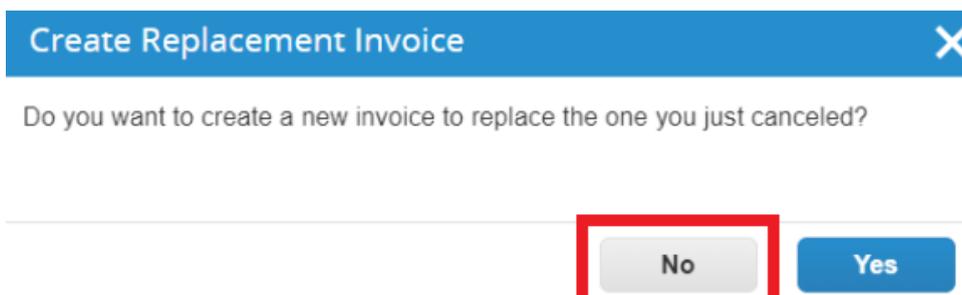
Related Information
Additional guides and supporting material can be found on our JLP Supplier Support website
https://www.jlpsupplierhelp.co.uk/portal/ss/