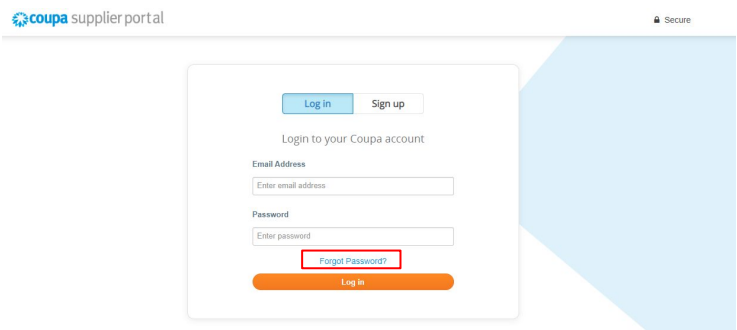
JOHN LEWIS & PARTNERS | JOHN LEWIS PARTNERSHIP | WAITROSE & PARTNERS

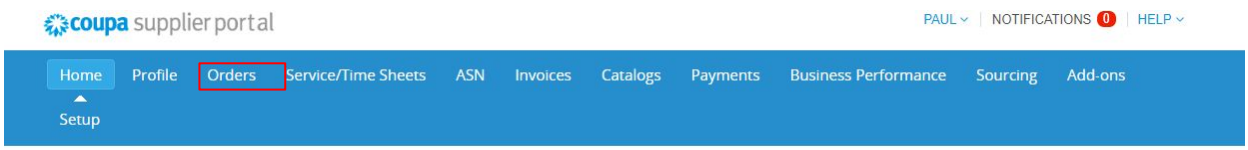
Raising an Invoice against a PO

Navigation from the home screen

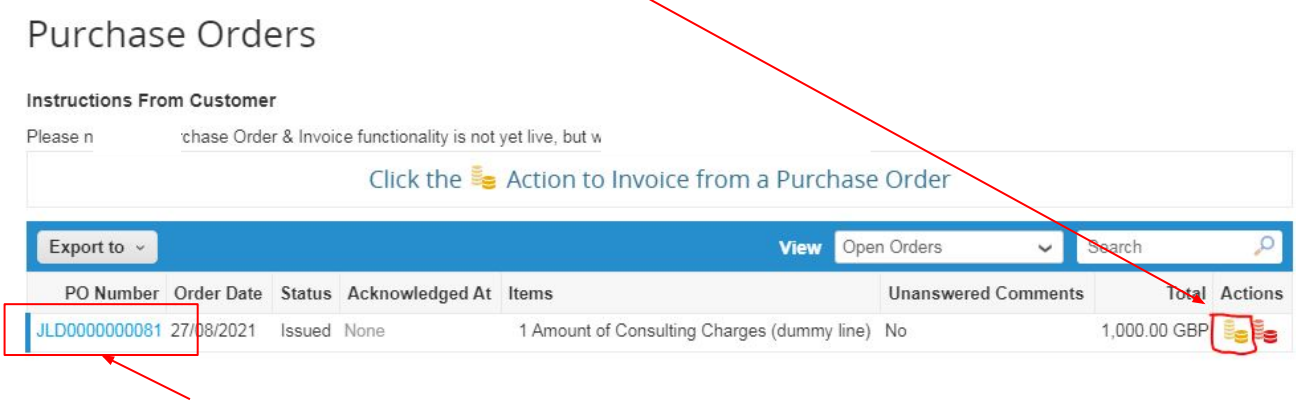
1. To login you will need your email address and password. The Coupa Supplier Portal link is: https://supplier.coupahost.com/sessions/new. If you have forgotten your password you can reset via the "Forgot Password" link.
   You should already have access to the Coupa system as we planned to go live in 2021. Log-in with your email and password. Your password can be reset by clicking on the forgot password link on the login page. If you have have not yet registered please email home.service.supplier.onboarding@johnlewis.co.uk



2. Once logged in you will need to select **Orders** from the toolbar across the top to view Purchase Orders.



3. Under the *Actions* section click the 'Yellow Coin' symbol alongside the Purchase Order (PO) you wish to raise the Invoice against.



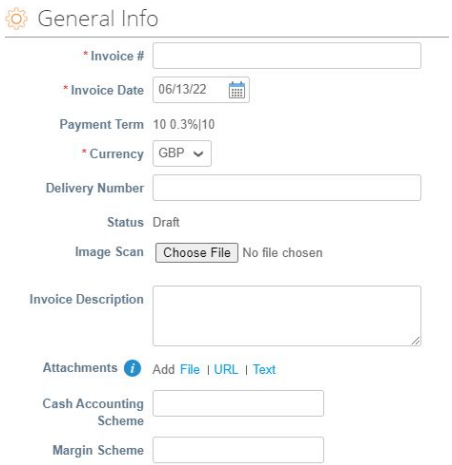
Purchase Order starting JLD

JOHN LEWIS PARTNERSHIP | coupa

Filling out the Invoice

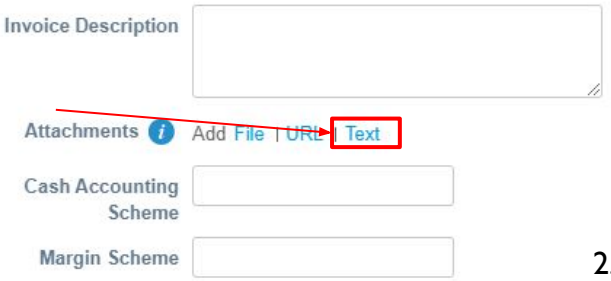
General Info

1. Invoice Number - Must be entered, this is your own reference that you would like to use for the invoice
2. Invoice Date - will automatically populate to the date of entry
3. Payment Terms - will automatically populate from the PO
4. Currency - will default to the currency of the PO
5. Delivery number - Please leave this blank
6. Invoice Description: Enter here the details of the fit being invoiced for:
   - Flooring: CR number / Customer Surname / Fit Date
   - Windows: FF CPM number / Customer Surname / Fit Date
   - Kitchens & Bathrooms: FK/FB CPM Number / Customer Surname
7. Image Scan - Add any Delivery note images
8. Attachments - Add any files required here and text lines for individual charges lines as required (see below)
9. Cash Accounting Scheme - Leave blank if field is showing
10. Margin Scheme - Leave Blank if field is showing



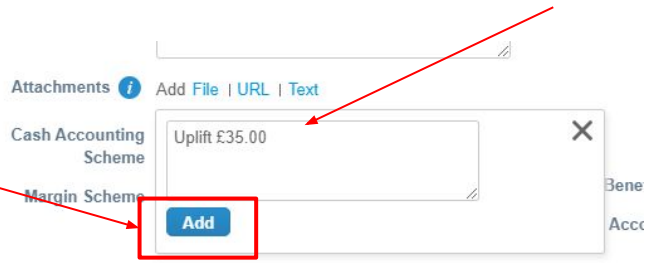
Where you break down your total invoice cost against multiple values, please use the Text function to enter each value:

1. Click Text

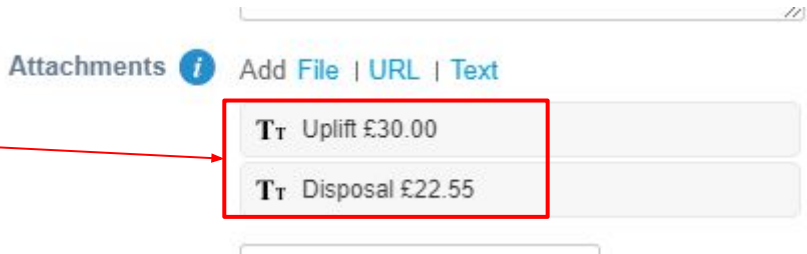


2. Enter the line detail in the box

3. Click Add

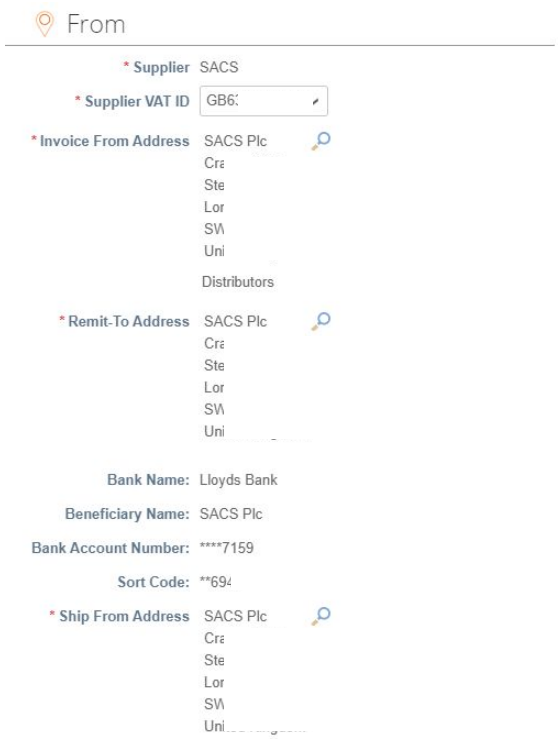


4. Repeat by adding as many lines as required



From

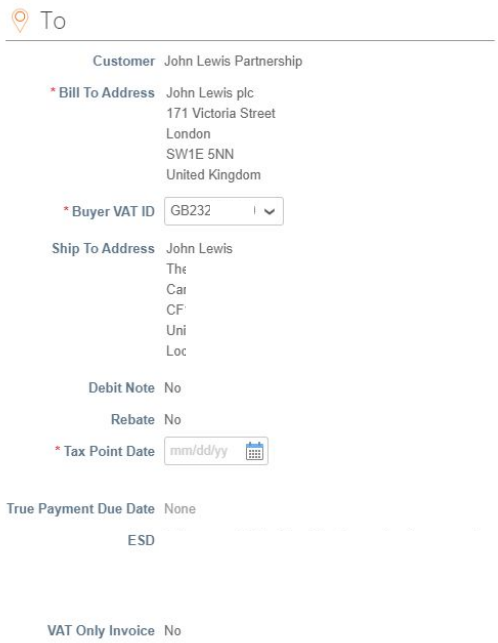
These will all automatically populate from the PO. If you have more than one Address with us then please use the magnifying glass to select your other Address.



To

This will all populate from the PO, the only area that requires your entry is **Tax Point Date. (Same date as the Invoice)**

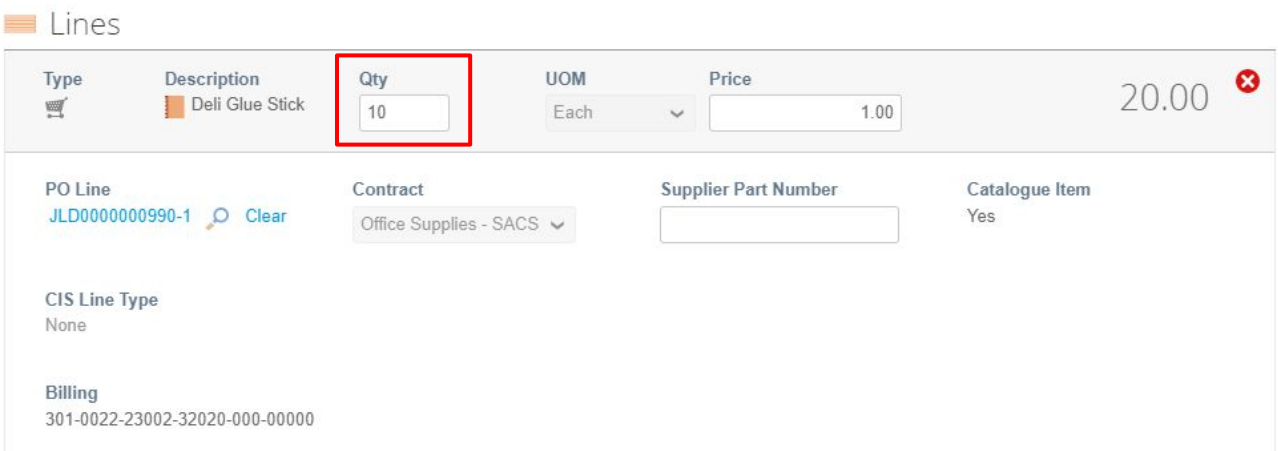
Tax Point Date cannot be future dated.



Lines

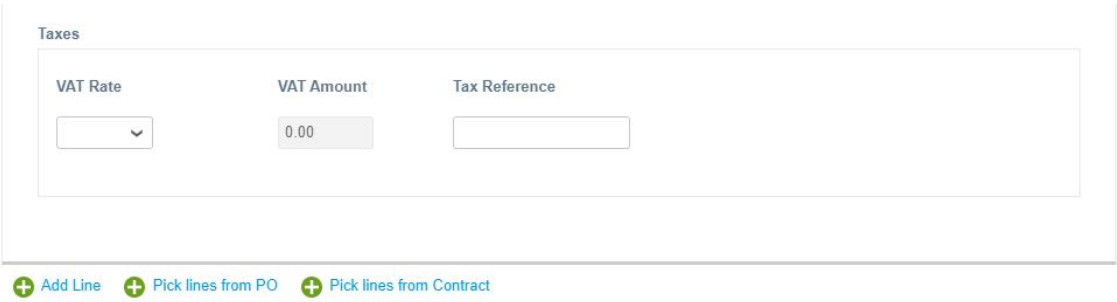
The Lines will populate with the full order values from the PO.
If you are not invoicing for the full PO amount then please amend the **Qty** field for the value of the invoice - DO NOT amend the price from £1.00.

Kitchens and Bathrooms only: If you are a CIS Supplier please select the CIS Line Type from Labour, Materials and *OOS (Out of Scope). OOS acts the same as your PXXXXXXNonCIS site number as we have closed these sites down. This will not be calculated within any withholding tax calculations*



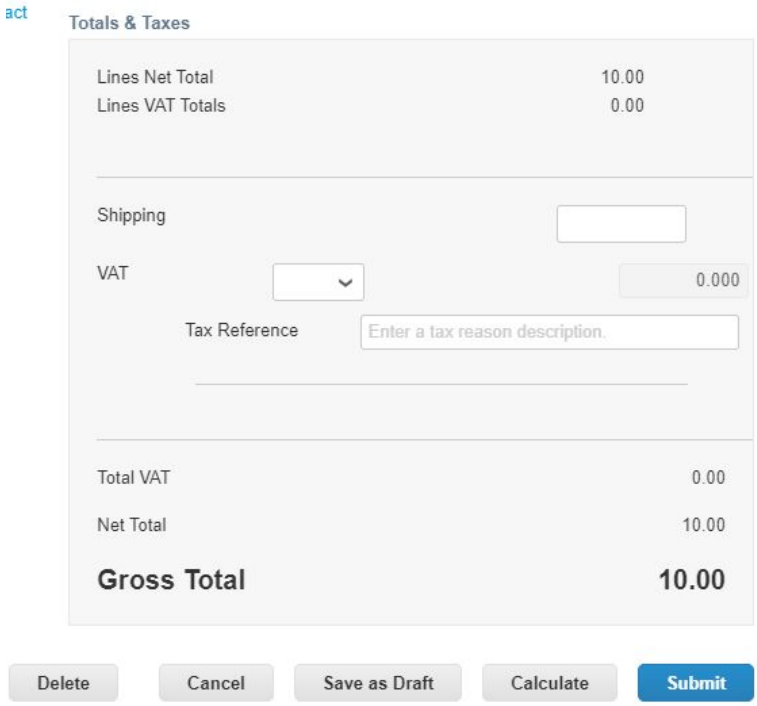
Taxes Section

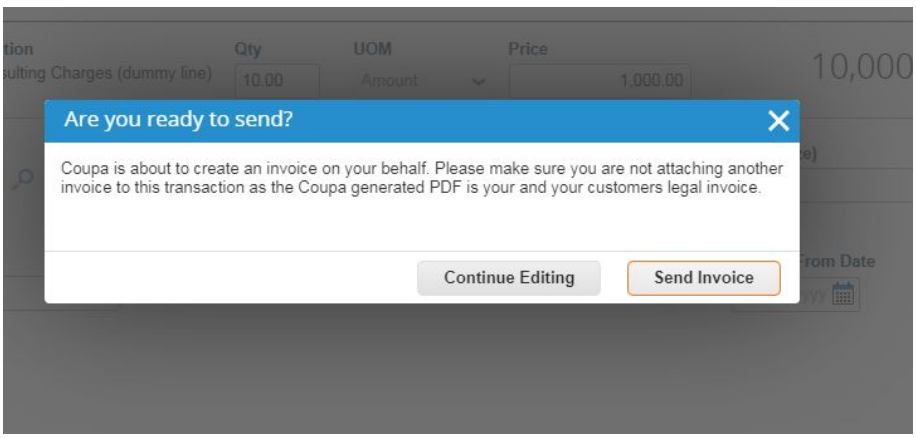
VAT Rate = Use the drop down to select the correct % or EXEMPT, REVERSE CHARGE or OUT OF SCOPE.
Remember you may only charge VAT if you are VAT registered.
The VAT amount will automatically be calculated, you will not be able to amend this field.
Tax reference = Your VAT registration number.
'Add Lines', 'Pick lines from PO', 'Pick lines from Contract - **DO NOT use these options**



Totals & Taxes

This will show the totals for lines & VAT. You will be able to enter any shipping in this section.
The shipping section should be left blank as these charges do not apply to Home Services.



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.