

## Raising an Invoice against a GNFR PO on Coupa

### Navigation

1. Login to Coupa Supplier Portal and select **Orders** from the toolbar across the top
2. Locate the Purchase Order (PO) you wish to invoice against and under **Actions**, click the 'Yellow Coins' icon:

**Warning:** Invoices cannot be created from POs which have more than 100 lines; in this instance please contact the Requester named on the PO.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the 'Orders' menu item highlighted in a red box. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'John Lewis Partnership'. The main content area is titled 'Purchase Orders' and includes a section for 'Instructions From Customer' with a message: 'Click the Action to Invoice from a Purchase Order'. Below this, there is a table of Purchase Orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row shows PO Number 'JLD00000', Order Date '02/15/22', Status 'Issued', Acknowledged At 'None', Items '30 Each of [redacted]', Unanswered Comments 'No', Total '60.00 GBP', and Assigned To '[redacted]'. The 'Actions' column for this row contains a 'Yellow Coins' icon, which is highlighted in a red box.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
JLD00000	02/15/22	Issued	None	30 Each of [redacted]	No	60.00 GBP	[redacted]	

### Filling out the Invoice

#### General Info Section:

1. **Invoice Number** - Must be entered
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** - enter the delivery number here
6. **Image Scan** - Add any Delivery Note images (if applicable)
7. **Supplier Note** - add any applicable free text notes here
8. **Attachments** - Attach any files associated here
9. **Exchange Rate** - must be entered for non GBP invoices. (eg.. EUR>GBP = 0.85, USD>GBP =0.74)

Note: These values are for example purposes only

## From Section:

1. This automatically populates from the PO

## To Section:

1. Enter the **Tax Point Date**  
Note: The Tax Point Date cannot be future dated

## Lines Section:

1. The Lines will populate with the full order values from the PO  
Note: If you are not invoicing for the full PO amount then please amend the **Qty** field
2. Please ensure that you are invoicing us in **exactly the same format** of the PO  
Eg. if the PO shows 1,000 @ £1 your invoice should be raised as 1,000 @ £1 = £1,000.  
**Warning: Please do not change these values (eg. do not invoice us 1 @ £1,000 as this will be rejected and will result in you needing to create and submit a new invoice in the correct format.**

## Taxes Section:

1. **VAT Rate** - Use the drop down to select the correct VAT rate (eg. '%' or 'EXEMPT (EXT)', 'REVERSE CHARGE (REV)' or 'OUT OF SCOPE (OOS)'  
Note: A Tax Reference of your choice must be entered when selecting EXT, REV or OOS)
2. Remember you may only charge VAT if you are VAT registered
3. The **VAT amount** will automatically be calculated, you will not be able to amend this field.
4. **Tax reference** enter your **VAT Registration Number**  
Note: You can not charge VAT on Waitrose Jersey or Guernsey POs (WTRJ or WTRG) unless you are GST Registered

'Add Lines', 'Pick lines from PO' & 'Pick lines from Contract' - Use these options if you wish to add invoice lines:

## Adding Line for Mixed VAT Invoice:

1. Complete the first line, then adjust the QTY to the correct value for that line, and add the VAT Code for that line
2. Click **Add a New Line**
3. Copy down the **Description** and **Price**
4. Add a **Qty** for the new line
5. Make sure the **UOM** on the new line matches the first line
6. Enter the **Tax Code** for the new line
7. Click on the magnifying glass against the PO line, this will take you through to the PO which you can choose

## Totals &amp; Taxes:

1. This will show the totals for **Lines & VAT**

2. You will be able to enter any shipping in this section
3. **Shipping** - enter the Net amount for the shipping here
4. **VAT** - Use the drop down if there is VAT to be charged as per the same rules as above
5. The **VAT amount** will automatically be calculated, you will not be able to amend this field
6. **Tax reference** enter your **VAT Registration Number**

Note Section:

1. On the invoice lines section you may notice a note heading which details notes for your purchase order or invoice
2. This is completed by your buyer in advance and cannot be edited
3. Please ignore this section

Finalising the Invoice:

1. Click **Calculate** to check that the values are correct as per what you are expecting to invoice
2. Once satisfied all is correct, click **Submit**
3. 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.'*
4. Any other warnings will detail any errors with the invoice. Please correct these errors and return to this section to re-submit your invoice
5. Once satisfied all is correct click **Send Invoice**
6. You will return to your invoice homepage where you will see the invoice as a status of 'Processing'
7. You can use this screen to see the status of all your invoices too.