A Step by step guide to: **converting purchase orders to invoices** on the Tungsten Network Portal.

RA

(.

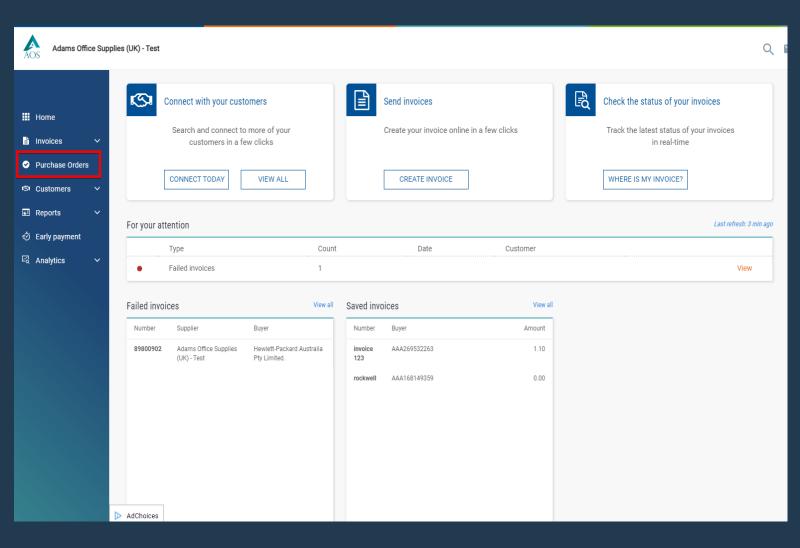
1

ar o

Æ.

Follow this step by step guide to utilize the PO Convert function of the portal.

- This is available to you if your customer send
 POs to the network and has enabled you to
 use the convert function.
- To begin, click "Purchase Orders" located in the main menu bar on the left side of the page.





The "Purchase Orders" page gives you the ability to search for purchase orders that have been delivered to Tungsten Network from your customer.

AOS

Adams Office Supplies (UK) - Test

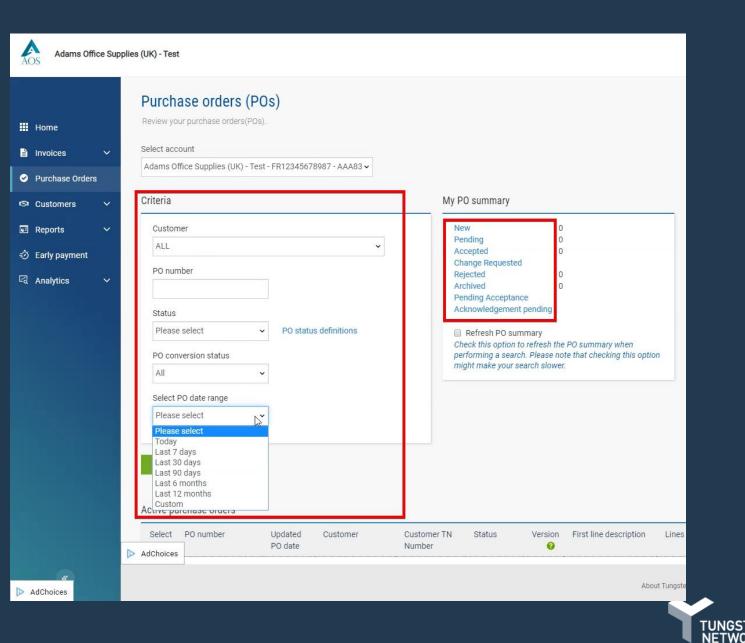
- You can manage your purchase orders by moving them to a different status within the "My PO summary" section.
- Updating the status of your purchase order allows you to confirm which purchase orders are open, closed, rejected or archived.
- When your purchase order is newly created or updated by your customer, it will appear in the new or pending status.
- Tungsten Network will send an email confirming a purchase order is available in the portal under the "My PO summary" section. After reviewing the email, you are ready to begin.

3

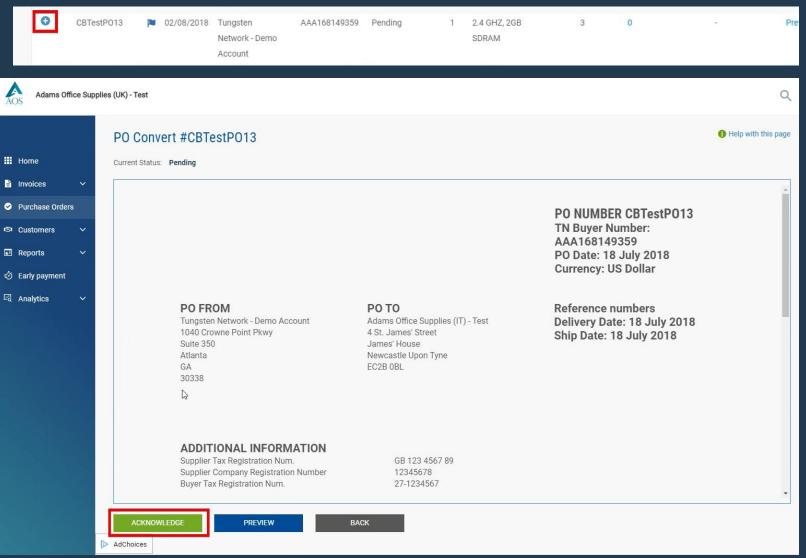
	Purchase orders (POs)
III Home	Review your purchase orders(POs).
🖹 Invoices 🗸 🗸	
 Purchase Orders 	Adams Office Supplies (UK) - Test - FR12345678987 - AAA83 🗸
ඟ Customers 🗸 🗸	Criteria My PO summary
🖬 Reports 🗸 🗸	Customer 0
 シ Early payment 	ALL Pending 0 Accepted 0
Analytics ~	PO number Change Requested Rejected 0 Archived 0
	Status Please select All Select PO date range Please select Pending Acceptance Acknowledgement pending Refresh PO summary Check this option to refresh the PO summary when performing a search. Please note that checking this option might make your search slower.
AdChoices	GET MY POS Active purchase orders Select PO number Updated Customer TN Status Version First line description Lines Integration Matchoices PO date Number Integration Lines Integration



- Search for your purchase order on the left side of the screen.
 - N.B. before searching please ensure to select the PO date range from the drop down menu.
- Once the search has run, all purchase orders in the status selected will be shown at the bottom of the page.
- You also have the ability to select the blue hyperlinked text available under "My PO summary" section.
- Once a selection is made, all purchase orders in the selected status will appear at the bottom of the page.

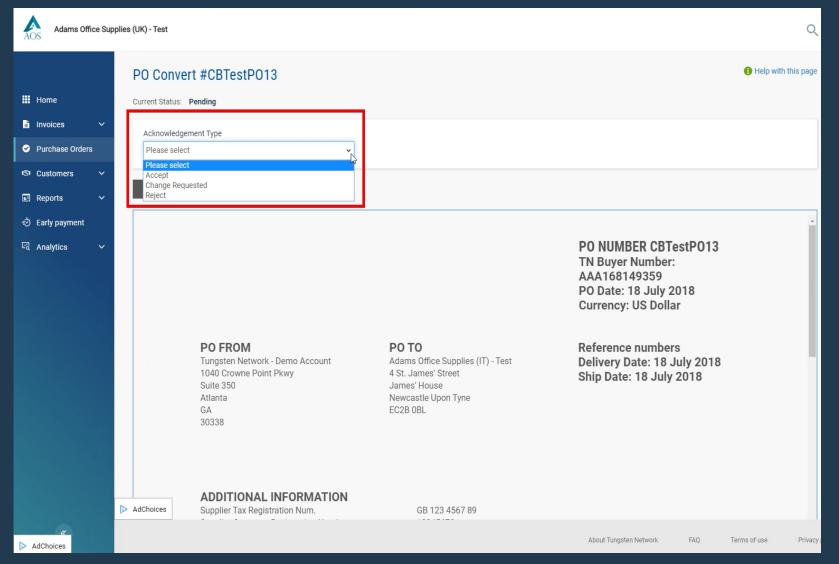


- Select the purchase order by clicking the blue link located on the left side of the page next to the purchase order number.
- The purchase order will open and, then you need to press the "Acknowledge" at the bottom of the page.



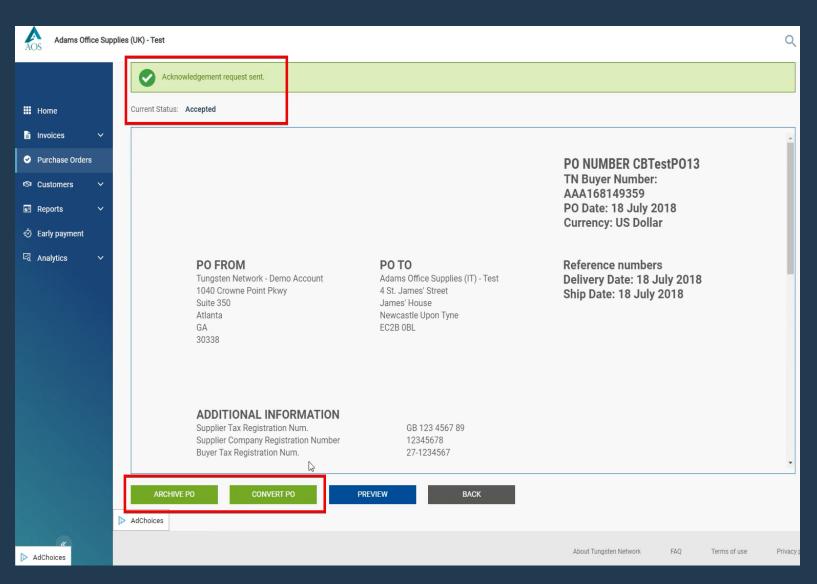


- On the next page it's important to review the purchase order details prior to accepting your purchase order.
 - N.B. If the purchase order contains invalid or missing information, it may be best to reject or request a change from your customer.
- If all purchase order details are valid, select the "Accept" option from the drop-down menu and then "Save".





- The current status of your purchase order will be changed to "Accepted".
- 10. If all purchase order details are valid, click"Convert PO".
- If the purchase order has been fulfilled and will no longer be used, move the purchase order to the archived status by pressing the "Archive PO" button.





- 12. The "Invoice number" field allows entry of your invoice number. Once your document's number has been entered, tick the box located next to Net amount. This will allow you to select the PO line items you would like to include in your electronic invoice.
 - N.B. Partial billing is accepted; please adjust the quantity only as the unit price has been fixed and should not be changed.

13. Next, enter the tax amount.

- If operating in a region where tax is referenced at the line item level, please select the individual tax rate from the drop menu.
- If operating in a region where tax is referenced at the summary level of the invoice, you will have the option to enter the tax amount prior to previewing and submitting your invoice.
- 14. Click "Create invoice" once all PO line items have been selected.
 - **N.B.** You can submit invoices against the same purchase order. Please ensure to use a unique invoice number for each submission.

	10.00	nvert #CBT	01010								
9	Create inv	oice									
es 🗸	Enter in	voice number*			-						
ase Orders	test123	345									
mers 🗸											
ts 🗸	Select PO	line items to us	e								
ayment	Apply ta	x code to selected	l items								
cs 🗸	20% VA	π	~								
	No	Part code	Description	Qty	UoM	Unit price	Net amount	Qty	Unit price	Tax rate	
	1	INSP3212	2.4 GHZ,	1,000	Each	1 249,00000	1 249,000	1,000	1 249,0000	20% VAT	~
		MON20243	21 Inch	1,000	Each	399,00000	399,000	1,000	399,00000	20% VAT	~
	2						400.000	1,000	499,00000	20% VAT	~
	2 3	OFF3212	Color La	1,000	Each	499,00000	499,000	1,000	499,00000		
	3			ß	Each	499,00000	499,000	1,000	499,00000		
	3	OFF3212 BACK	Color La CREATE INVO	ß	Each	499,00000	499,000	1000	439,00000		



15. Confirm that you have selected the correct purchase order line items to be included in your invoice. If not, please click "Back". If all information shown is valid, click "Confirm" to proceed to the final page.

Adams Office Supplie	es (UK) - Test								Q	Your account Help & Support ▼	
	PO Con	vert #CBTest	P013						Help with this page		
2	Create invo	lice									
ces 🗸	Invoice n										
e Orders	test1234	5									
rs ∽											
~	Line	Description	Qty	UoM	Unit price	Tax rate	Tax amount	Net amount	Gross amount		
	1	2.4 GHZ,	1,000	Each	1 249,00000	20,00	249,80	1 249,00	1 498,80		
~	2	21 Inch	1,000	Each	399,00000 🔓 499,00000	20,00	79,80	399,00	478,80		
	Summary										
	No. of line Sub total			3 D 2 147,00							
	Total tax Net total			SD 429,40 D 2 576,40							
		ACK	CONFIRM								
	D	ACK	CONFIRM								
											% Hide
	AdObaiaaa									UPGRADE TO INTEGRATED SOLU	JTION
	 AdChoices 										
							About Tungster	Network FAQ	Terms of use Privacy po	olicy Contact Support in	00



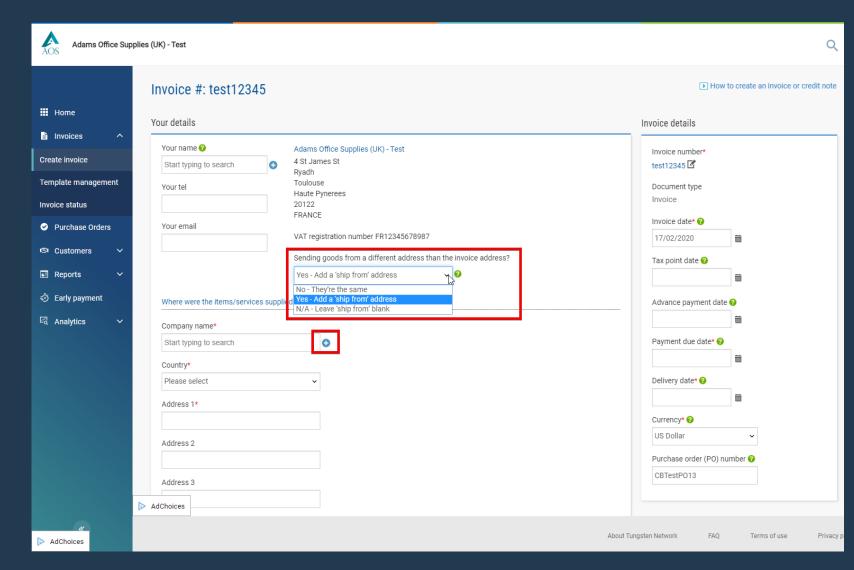
- 16. You can further review, edit and/or add details on your invoice.
- Enter your company name, phone number and 17. email address in the "Your details" section. Next, enter the name, phone number and email address for your customer in the "Who you are invoicing" section.

- You can save contact details by clicking the blue + circle located in the "Your details" and "Who you are invoicing" sections. This will mean you won't have to add them again.
- Once contact details have been entered, exit out of the text box to continue.

		j.	How to create an invoice or credit n
e			
ces 🗸	Your details		Invoice details
hase Orders	Your name 😧	Adams Office Supplies (UK) - Test	Invoice number*
		4 St James St Ryadh	test12345 🗹
omers 🗸	Mauntal	Toulouse	Document type
orts 🗸	Your tel	Haute Pynerees	Invoice
nis •		20122	Invoice
payment	Your email	FRANCE	Invoice date* 📀
ytics 🗸		VAT registration number FR12345678987	17/02/2020
yucs 🗸		Sending goods from a different address than the invoice address?	Tax point date 🕢
		No - They're the same 🗸 🗸 🗸	
			Advance payment date 🕢
	Who you are invoicing		
	Name 🕢	Tungsten Network - Demo Account	Payment due date* 🧭
		1040 Crowne Point Pkwy	
		Suite 350	
	Tel	Atlanta GA	Delivery date* 😢
		a9a 9a9	
		BULGARIA	
	Email	Sending goods to a different address than the invoice address?	Currency* 🚱
		No - They're the same 🗸 🤨	US Dollar 🗸
			Purchase order (PO) number 🤣
	Click here for additional hea	der fields such as Delivery/GRN number, Cost centre etc	CBTestP013



- 20. If the shipping details you're sending from differ from your Invoice address details, please select the "Yes Add a 'ship from' address" from the drop-down menu. N.B. You can also bypass this section if it doesn't apply to you.
 - To enter shipping information, choose
 "Yes Add a 'ship from' address" and
 new fields will appear for population.
 - To save a shipping address to your profile to be used for future submissions, click the blue circle located next to the "Company name" field. Once shipping details have been entered, please exit out of the text box to continue.





N.B. If additional header information is required by your customer, expand this section and complete the details. If you're unsure if this applies to you, please ask your customer or raise a ticket for assistance. Once the details, bill of lading, delivery note number and cost centre have been populated, please move to the next section.

	Your details			Invoice details	
	Your name 😮		Adams Office Supplies (UK) - Test	Invoice number*	
e	Start typing to search	0	4 St James St	test12345	
ces ^	Your tel		Ryadh Toulouse Haute Pynerees	Document type	
voice			20122	Invoice	
voice	Your email		FRANCE	Invoice date* 📀	
e management			VAT registration number FR12345678987	17/02/2020	
tatus			Sending goods from a different address than the invoice address?	Tax point date 📀	
hase Orders			No - They're the same 🗸 🗸	i	
omers 🗸	Whe year are invaising			Advance payment date 🥝)
orts 🗸	Who you are invoicing			i	
	Name 😮		Tungsten Network - Demo Account	Payment due date* 🚱	
payment	Start typing to search	0	1040 Crowne Point Pkwy Suite 350	i	
ytics 🗸 🗸	Tel		Atlanta	Delivery date* 🚱	
			GA a9a 9a9		
	Email		BULGARIA	Currency* 😯	L3
			Sending goods to a different address than the invoice address?	US Dollar	¥
			No - They're the same 🗸 🕜		
	Click here for additional here	ader fie	lds such as Delivery/GRN number, Cost centre etc	Purchase order (PO) num	ber 🕜
				CBTestP013	
	Bill of lading 😯		Account code 🕢 Notes to your customer 🕢		
	Delivery note number 🕜		Cost centre 🕜		



- 21. In the "Invoice details" section add your invoice date, payment due date and delivery date by selecting the calendar icon, this will ensure your date is in the correct format for submission.
 - Some regions of the world require a tax point date. If operating in one of these regions, you will be required to reference this mandatory data in the "Tax point date" field.
- 22. Your currency and purchase order number should not be changed. The invoice will be validated against the purchase order details available in the system. If header and line level details do not match the purchase order data, your invoice is subject to rejection by Tungsten Network.

Adams Office Supp			Q
	Your details		Invoice details
	Your name 🕜	Adams Office Supplies (UK) - Test	Invoice number*
III Home	Start typing to search	4 St James St	test12345 🗹
Invoices	Your tel	Ryadh Toulouse Haute Pynerees 20122	Document type Invoice
Create invoice		FRANCE	
Template management	Your email	VAT registration number FR12345678987	Invoice date* 📀
remplate management			17/02/2020
Invoice status		Sending goods from a different address than the invoice address?	Tax point date 📀
 Purchase Orders 		No - They're the same 🗸 🗸	
© Customers ✓	Who you are invoicing		Advance payment date 🤣
🖻 Reports 🛛 🗸	Name 😮	Tungsten Network - Demo Account	
∉ð Early payment	Start typing to search	10.40 Occurre Deint Divers	Payment due date* 🕢
		Suite 350 Atlanta	<u> </u>
역 Analytics 🗸	Tel	GA	Delivery date* 🕜
		a9a 9a9 BULGARIA	
	Email	Sending goods to a different address than the invoice address?	Currency* 😧
		No - They're the same $\checkmark \heartsuit$	US Dollar 🗸
	Click here for additional header	ields such as Delivery/GRN number, Cost centre etc	Purchase order (PO) number 🥑
			CBTestP013
	Bill of lading 😮	Account code 🤣 Notes to your customer 🥑	
	Delivery note number 🕜	Cost centre 🕜	
	AdChoices		
AdChoices		About Tu	ungsten Network FAQ Terms of use Privacy pol



- 23. It's important to note again, line items details should not be modified. These details were provided to Tungsten Network by your customer.
 - The Goods or Service lines should only be modified to provide additional information and/or a date range.
 - For example, work performed between January 1st and January 15th. It's best to follow standard invoicing practices when referencing line item discounts and/or entering additional information at the line item level.
 - If you need to edit any line items, click on the edit icon on the right side of the line item you would like to modify. You can expand the additional line level information for more options.

Invoice items						
Item		Quantity / Unit	Price	Line amount	Total	
01 INSP3212 -	2.4 GHZ, 2GB SDRAM	1 / Each	1 249,00000	1 249,00	1 498,80	⊠⊗
02 MON20243	- 21 Inch Monitor	1 / Each	399,00000	399,00	478,80	⊠⊗
03 OFF3212-0	Color Laserjet Printer	1 / Each	499,00000	499,00	598,80	⊠⊗
ADD		6				
Adams Office S	upplies (UK) - Test					۹
	Invoice items					_
Home Invoices A Create invoice Implate management Invoice status Implate management Purchase Orders Implate Reports Implate Reports Implate Analytics Implate		nal information 🕢 Part number	Quan	0 1	Ce* 249,0000 x amount 249,80 Discount 249,80 Discount % 2 0,00 Discount % 2 0,00 Discount 0,00 Discount 0,00 Tax 249,80 Total 1 498,80	
AdChoices	AdChoices / E LINE ITEM CANCEL		About Tungsten	Network FAQ	Terms of use P	rivacy p



- 24. You can add Special Line Items. These are items such as fuel charges, freight, admin charges, green tax etc
 - To add special line items that are not already listed on your purchase order click "Add" under the 'Invoice items' section and select the special line type from the dropdown menu.
 - N.B. If you feel an additional 'normal line item' should be added to your purchase order instead, contact your customer directly.
 - Request that your PO is updated and resent to Tungsten. Once your purchase order has been updated, it will be available under "Pending" in the "My PO summary".

Invoid	e items					
	Item	Quantity / Unit	Price	Line amount	Total	
01	INSP3212 - 2.4 GHZ, 2GB SDRAM	1 / Each	1 249,00000	1 249,00	1 498,80	₫ 🛛
02	MON20243 - 21 Inch Monitor	1 / Each	399,00000	399,00	478,80	⊠⊗
03	OFF3212 - Color Laserjet Printer	1 / Each	499,00000	499,00	598,80	₫ 🛛
L	ADD					

Invoice items						
ltem		Quantity / Unit	Price	Line amount	Total	
01 INSP3212 - 2.4 GHZ, 2GB SDRAM		1 / Each	1 249,00000	1 249,00	1 498,80	
02 MON20243 - 21 Inch Monitor		1 / Each	399,00000	399,00	478,80	
03 OFF3212 - Color Laserjet Printer		1 / Each	499,00000	499,00	598,80	
Line item type ② Goods Normal line Goods Service Special line	✓ description	Unit* 📀 Please select	Quar		Price* 🚱	
Admin Charge Advance Recycling Fee Carriage Credit / Discount Demurrage Freight		Tax type* Please select	~		Tax amount 🚱	
Fuel Surcharge Green Tax Insurance Packling Rounding Line Special Charge		discounts, and other additional information			Line amount	0,00
					Discount Tax	0,00 0,00
					-	
SAVE LINE ITEM	CANCEL				Total	0,00



- 26. If you have attachments to send with your invoice, add these prior to submitting your invoice.
 - **N.B.** Please do not attach an additional copy of an invoice. Attachments should be used for supporting documentation only needed to approve your invoice.

Additional information	
Attachments 📀	File types we accept Your customer allows a maximum of 8 attachments. The maximum file upload size is 12 MB. Please note that the digitally signed pdf created by Tungsten Network will be the legal invoice document. In order to avoid any tax risk at audit, please do not attach any duplicate invoices. In case attachments are necessary please ensure they are clearly marked as "copy and not for tax purposes".

"Remit to" details				
"Remit to" address 422 Bridge Street Glen Park Cambridge RD9 3CQ IRELAND	6	"Remit to" bank 🚱 Bank name Sort code Bank account number Account name Manage default settings	Norwich & Peterborough Buildir 434-45321 43945992934 Sedgewick & Sons	ng Society
Summary				
				Invoice (\$)
			Total net	2 147,00
			Total tax	429,40
				Undo changes
			Total gross	2 576,40

- 27. The invoice summary contains the net, tax and gross.
 - If you are in a region of the world where tax is referenced at the line level, tax type and amount were entered after the purchase order was accepted.
 - If you are located in the region of the world where tax is referenced at the summary level only, please enter the full invoice tax amount at this time.



28. Please "Preview" your invoice prior to submitting it. If all the details are correct, press "Send" at the bottom of the page to submit your invoice. You're now done.

"Remit to" details			
"Remit to" address 422 Bridge Street Glen Park Cambridge RD9 3CQ IRELAND	"Remit to" bank 🕜 Bank name Sort code Bank account number Account name Manage default settings	Norwich & Peterborough Build 434-45321 43945992934 Sedgewick & Sons	ling Society
Summary			
			Invoice (\$)
		Total net	2 147,00
		Total tax	429,40
			Undo changes
		Total gross	2 576,40
	SAVE AS TEMPLATE SAVE	PREVIEW	SEND



Purchase Orders

Converting a purchase order to an invoice is simple, but if you get stuck let us know so we can try to improve your experience.

PO Convert

We encourage you to use the <u>Help & Support</u> page if you need assistance navigating the portal

Invoice

Raise support ticket if you experience a technical issue using the site

Invoice Status Service OR send feedback to improve the usability of the portal, via the feedback ribbon on the page you're working on

TUNGSTEN

Have a good day

