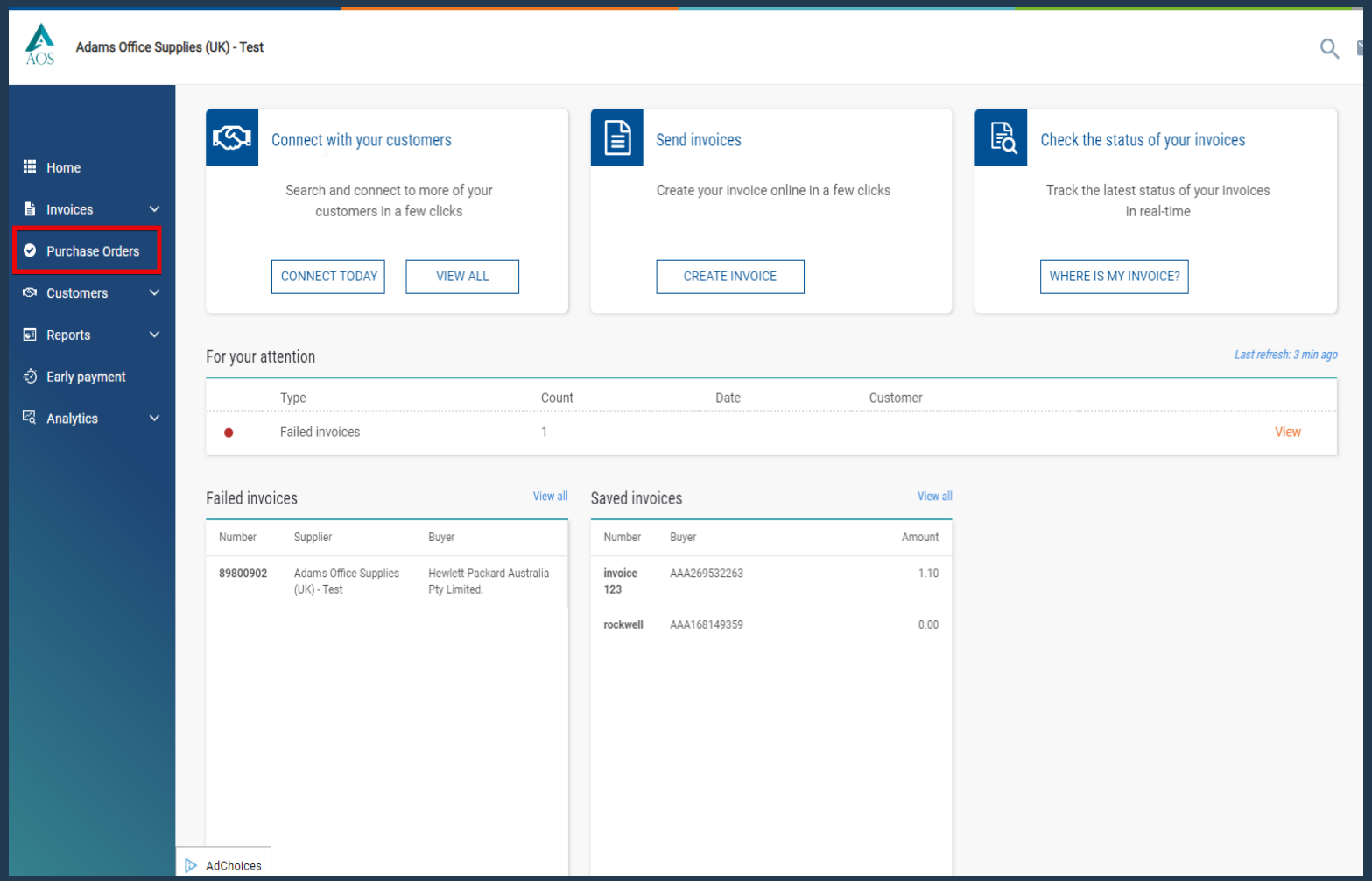
A Step by step guide to: **converting purchase orders to invoices** on the Tungsten Network Portal.

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.



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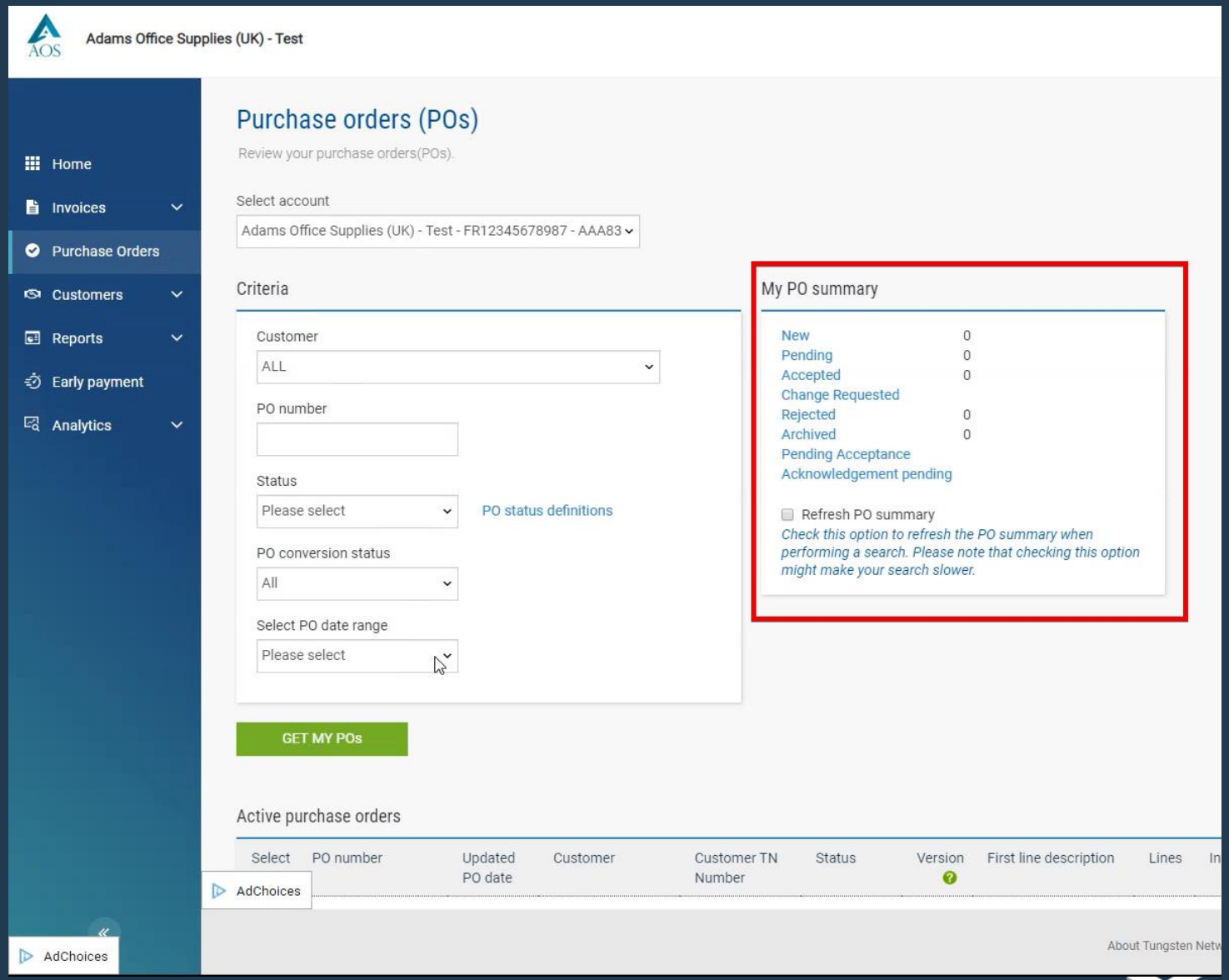
The “Purchase Orders” page gives you the ability to search for purchase orders that have been delivered to Tungsten Network from your customer.

- 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.



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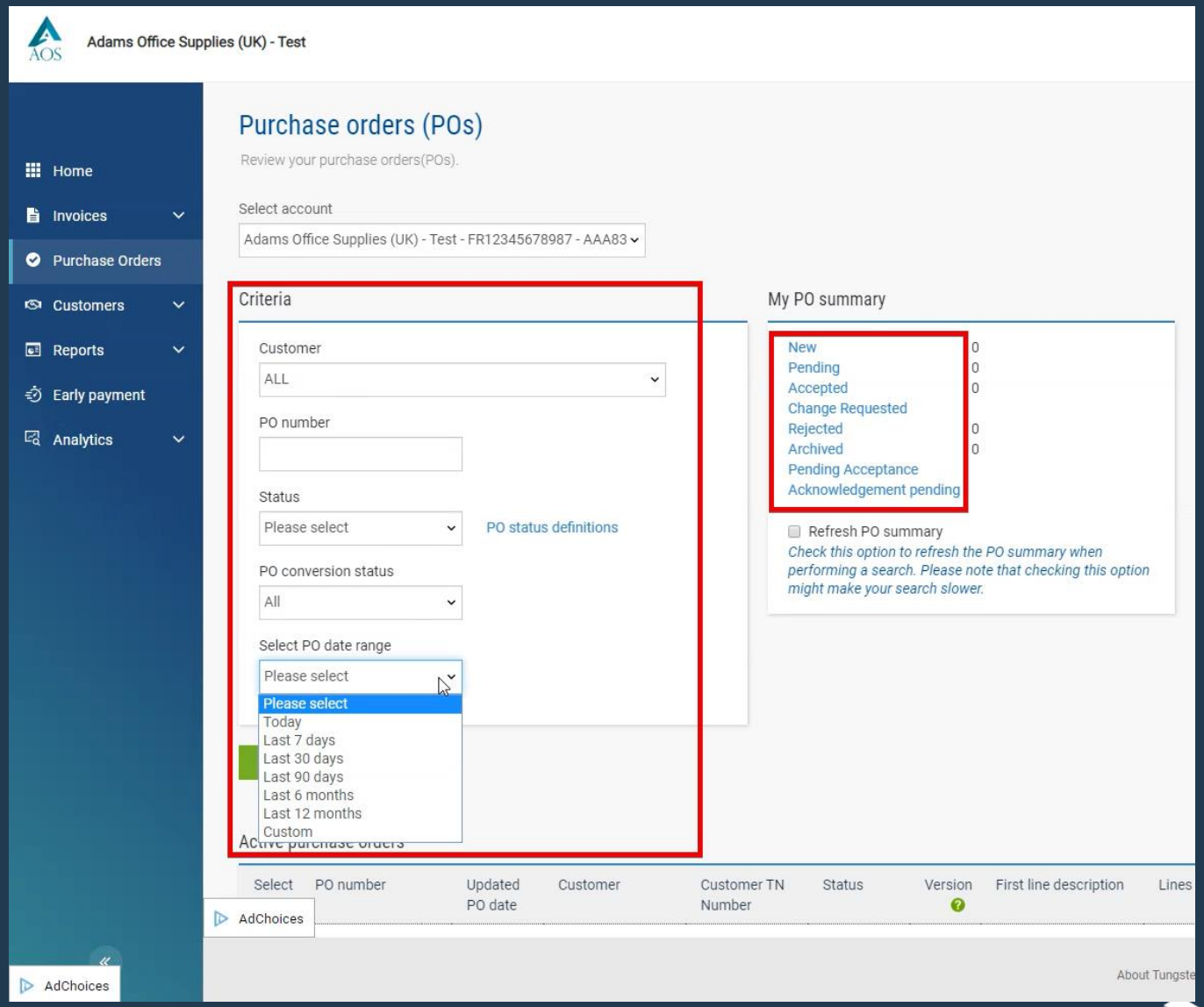
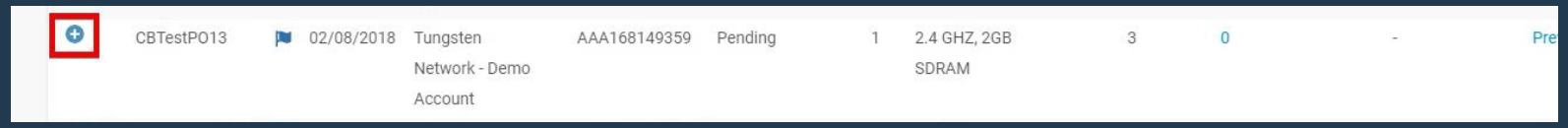
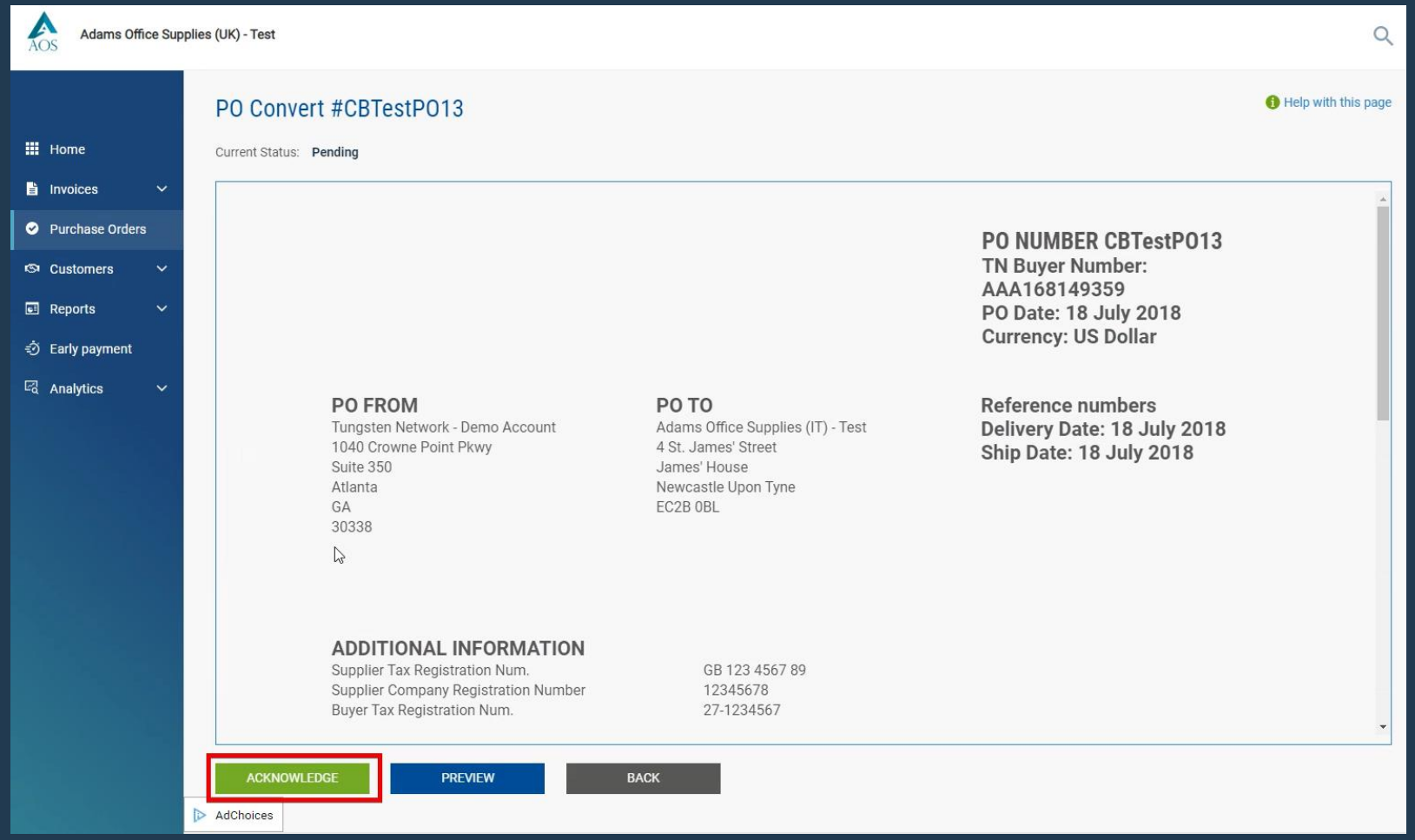
1. Search for your purchase order on the left side of the screen.
   - ***N.B. before searching** please ensure to select the PO date range from the drop down menu.*
2. Once the search has run, all purchase orders in the status selected will be shown at the bottom of the page.
3. You also have the ability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



5. Select the purchase order by clicking the blue link located on the left side of the page next to the purchase order number.

6. The purchase order will open and, then you need to press the “Acknowledge” at the bottom of the page.

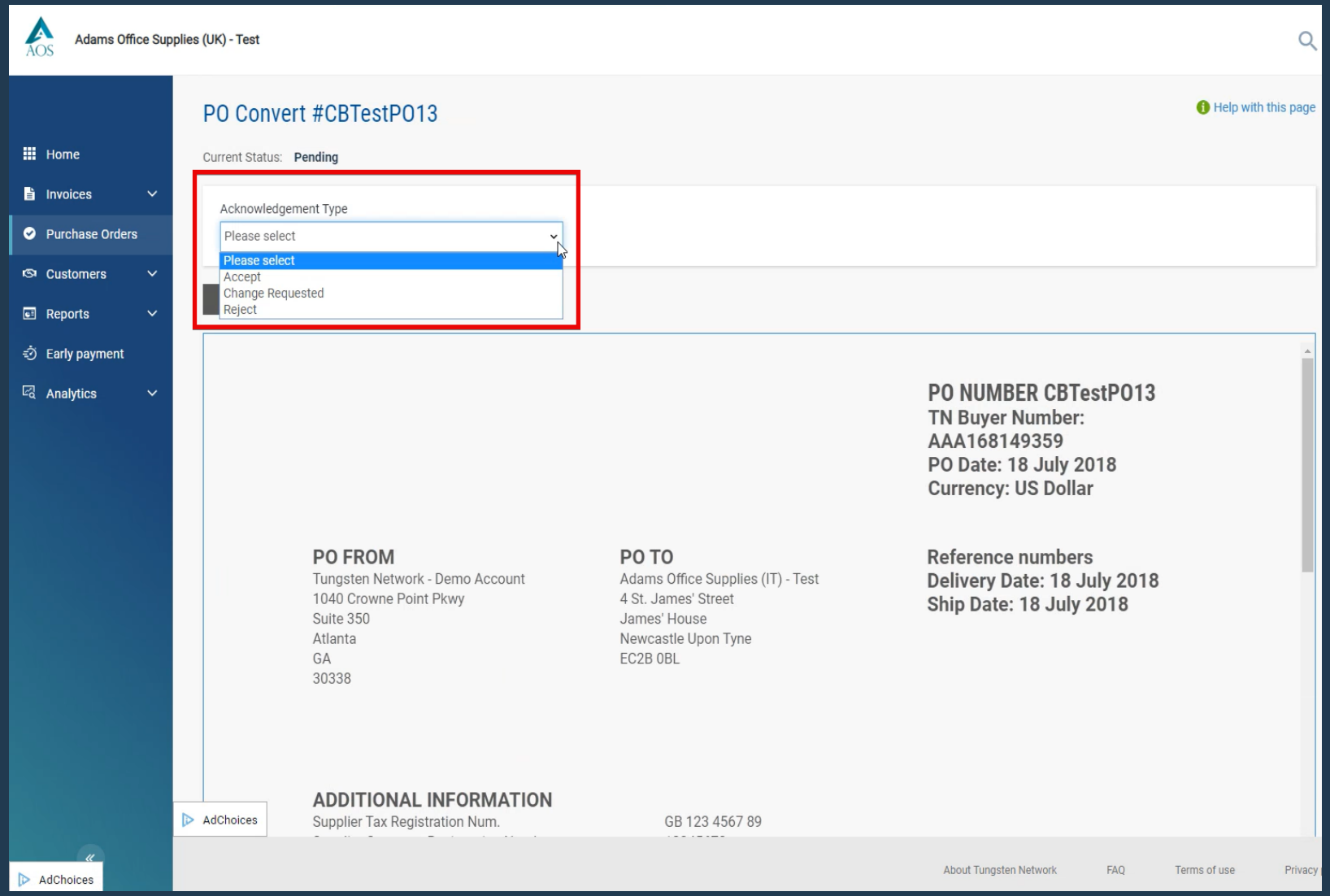




7. On the next page it's important to review the purchase order details prior to accepting your purchase order.

   - ***N.B.*** *If the purchase order contains invalid or missing information, it may be best to reject or request a change from your customer.*

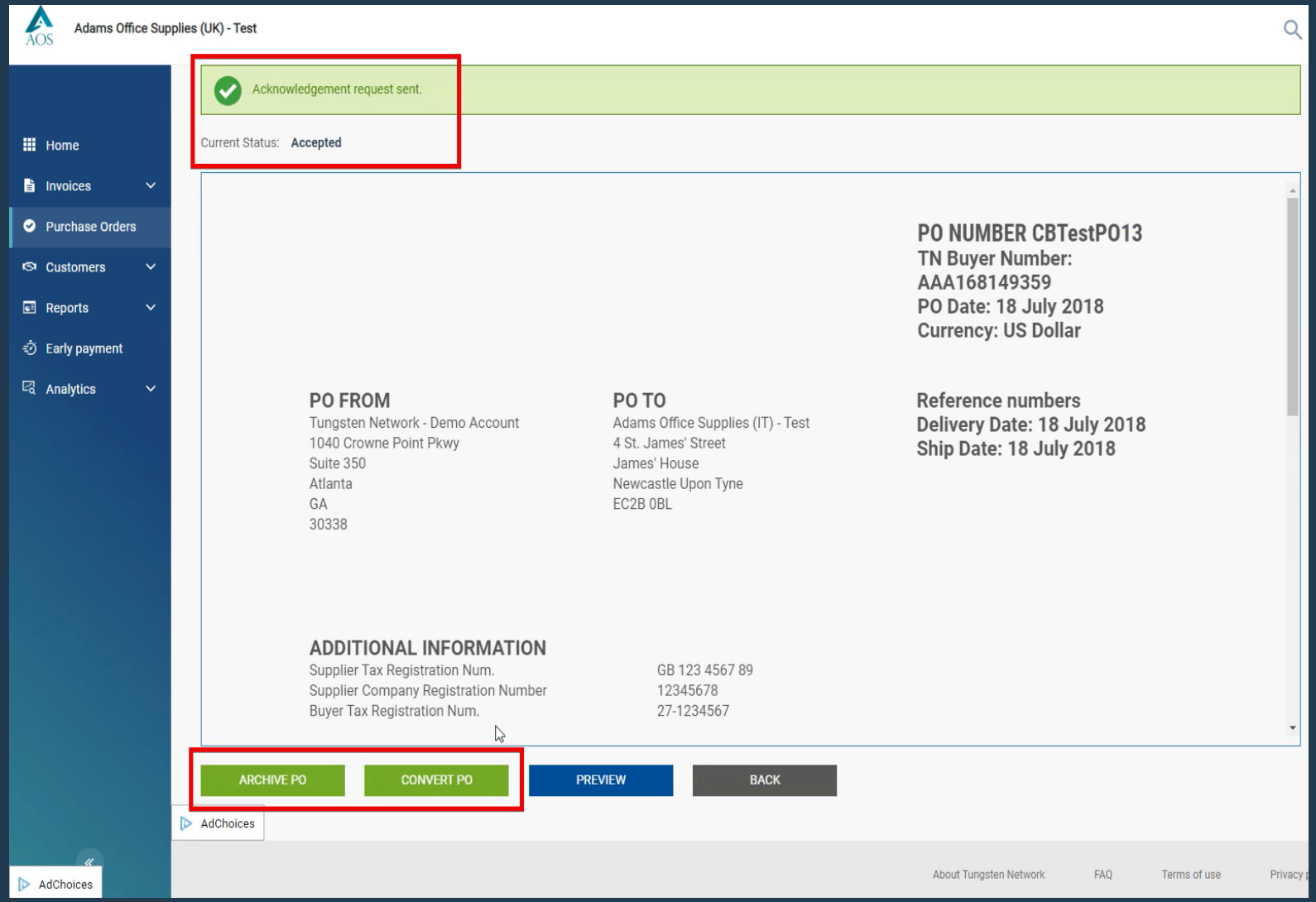
8. If all purchase order details are valid, select the "Accept" option from the drop-down menu and then "Save".



9. The current status of your purchase order will be changed to “Accepted”.

10. If all purchase order details are valid, click “Convert PO”.

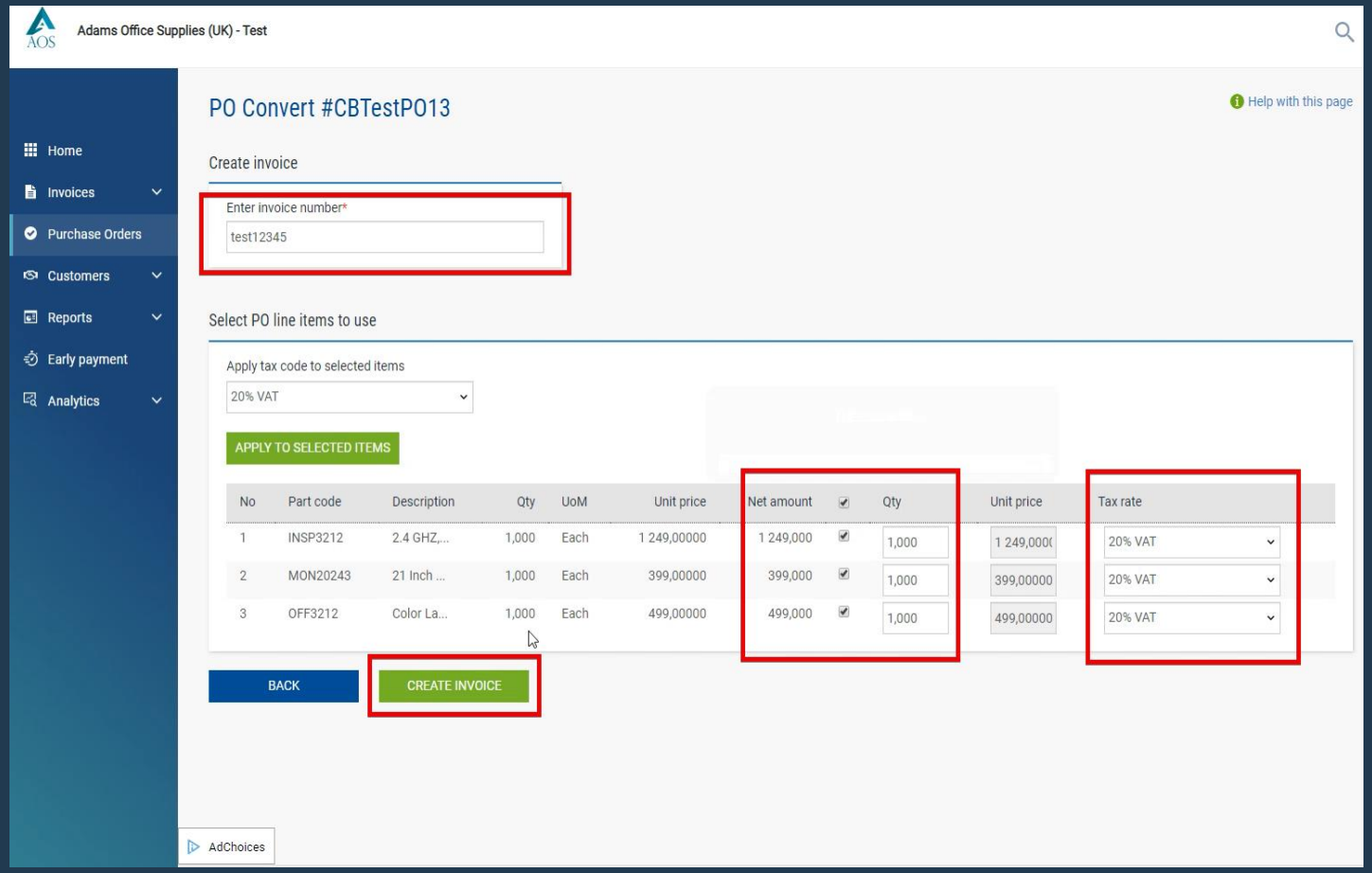
11. If the purchase order has been fulfilled and will no longer be used, move the purchase order to the archived status by pressing the “Archive PO” button.



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.*



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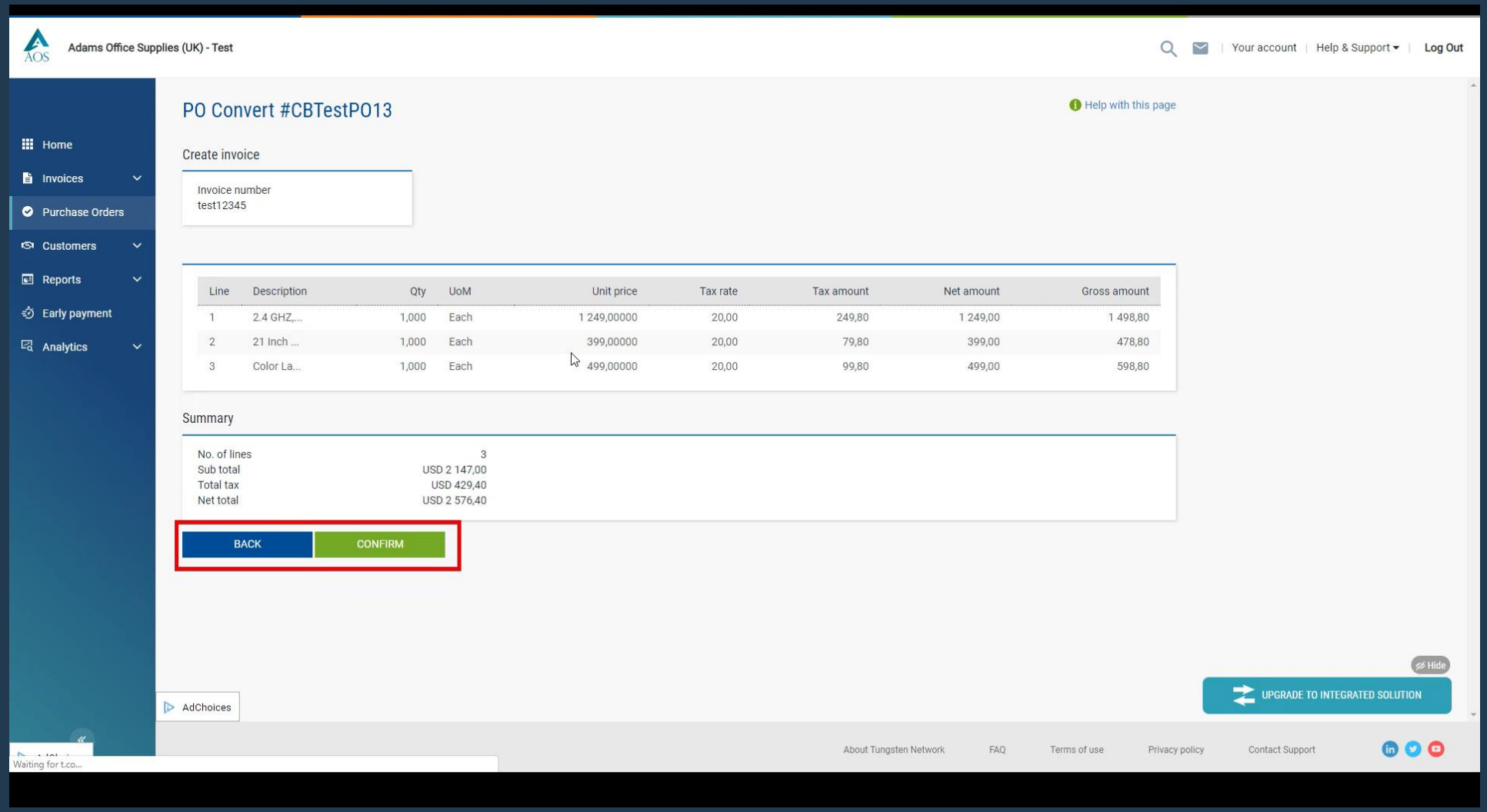
15. Confirm that you have selected the correct purchase order line items to be included in your invoice. If not, please click “Back”. If all information shown is valid, click “Confirm” to proceed to the final page.

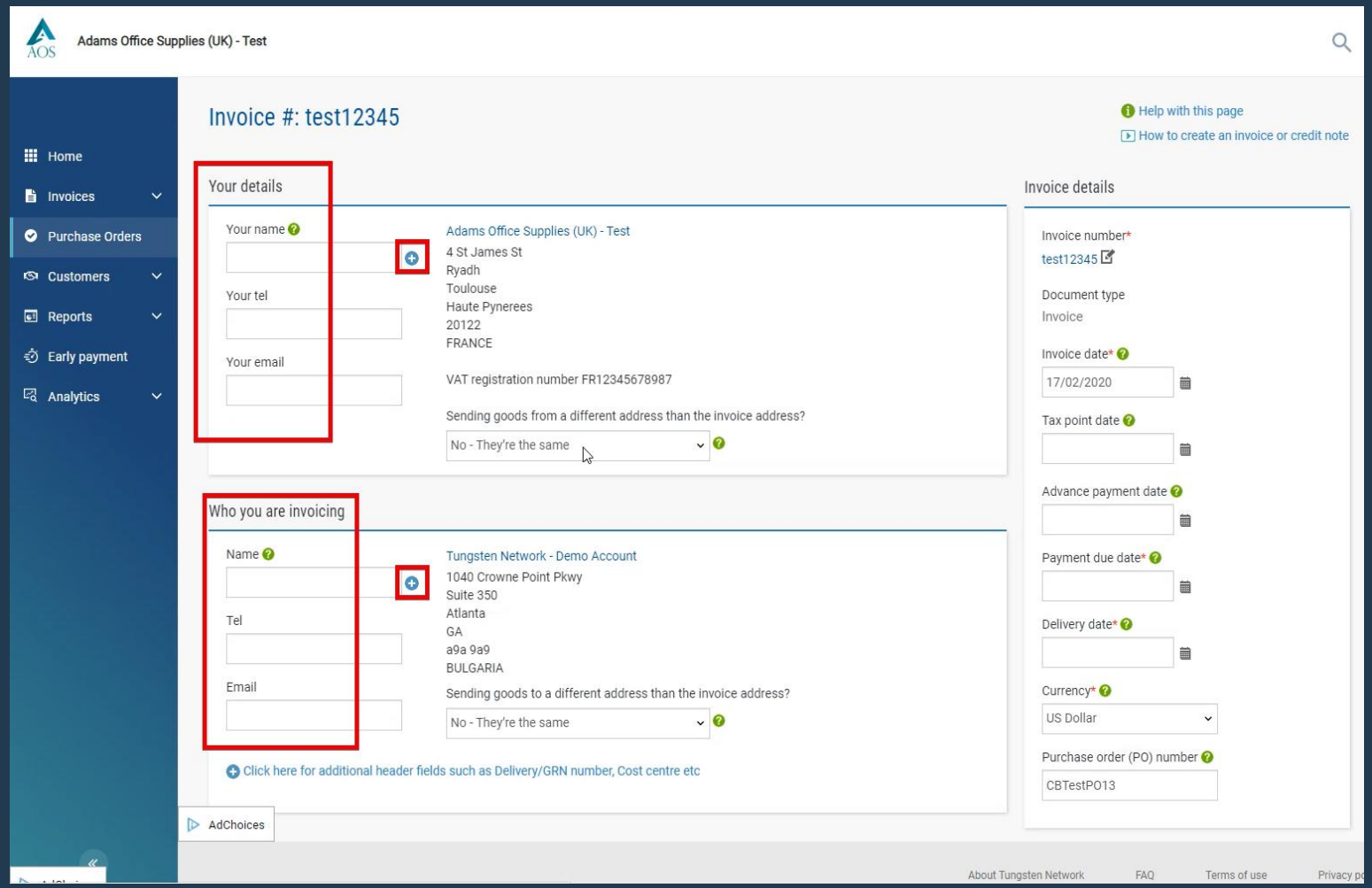


16. You can further review, edit and/or add details on your invoice.

17. Enter your company name, phone number and 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.

18. 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.

19. Once contact details have been entered, exit out of the text box to continue.



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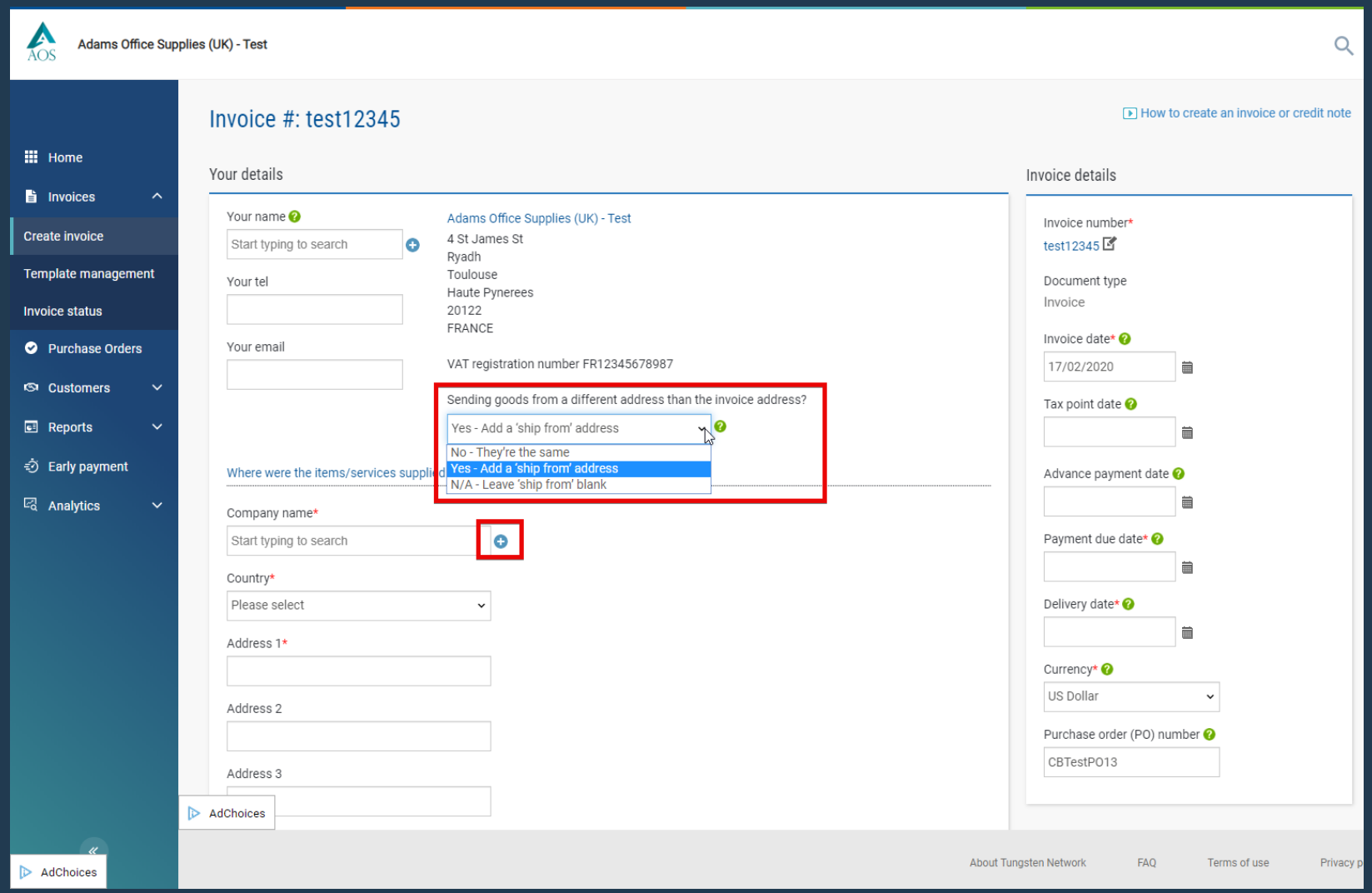
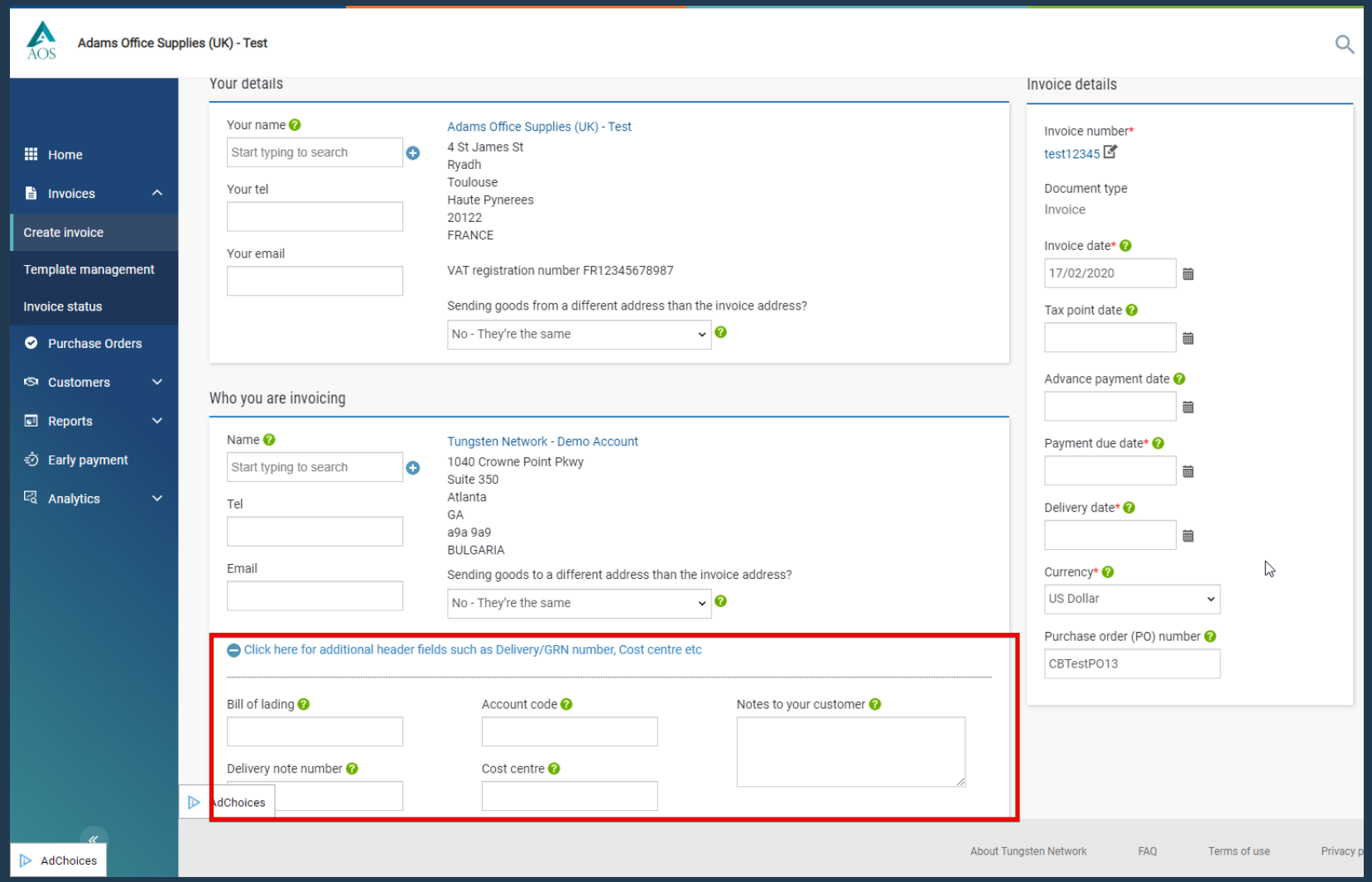
20. If the shipping details you're sending from differ from your Invoice address details, please select the "Yes – Add a 'ship from' address" from the drop-down menu. **N.B.** You can also bypass this section if it doesn't apply to you.

- *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.*



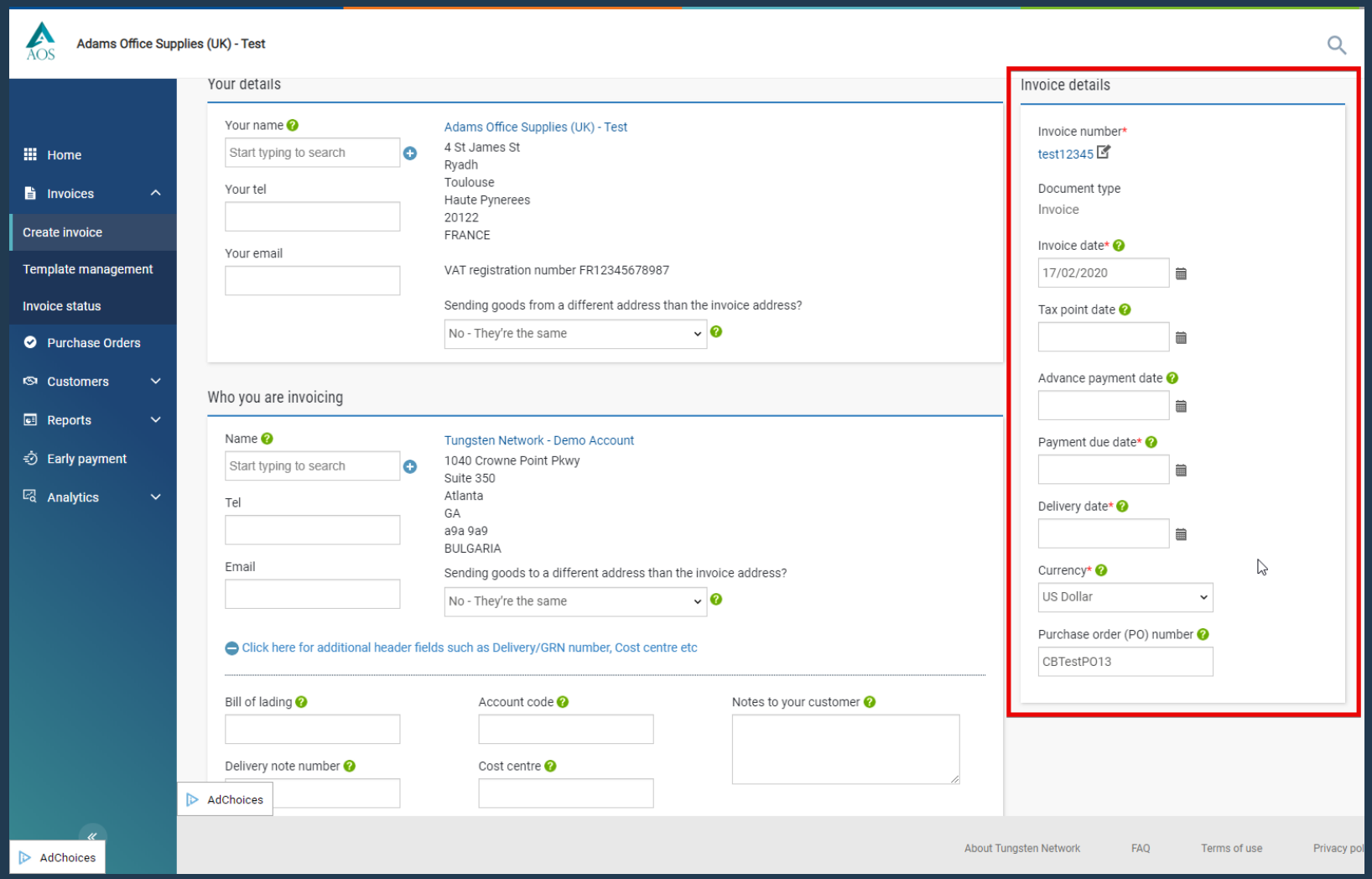
N.B. If additional header information is required by your customer, expand this section and complete the details. If you're unsure if this applies to you, please ask your customer or raise a ticket for assistance. Once the details, bill of lading, delivery note number and cost centre have been populated,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



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.

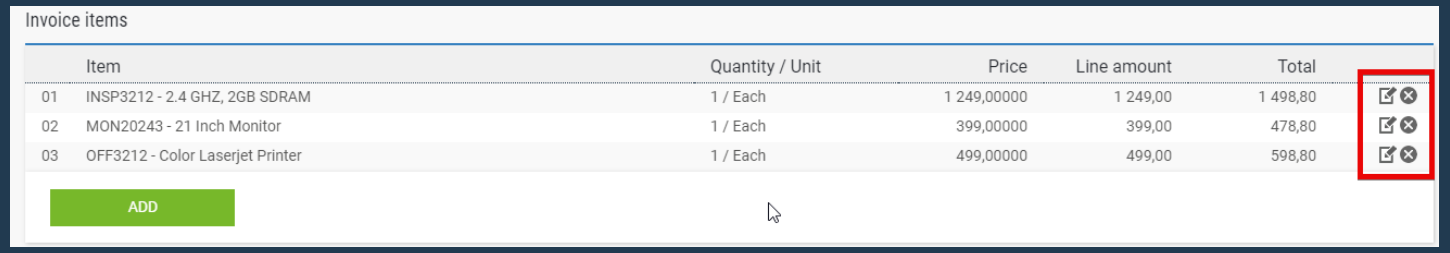
- *Some regions of the world require a tax point date. If operating in one of these regions, you will be required to reference this mandatory data in the “Tax point date” field.*

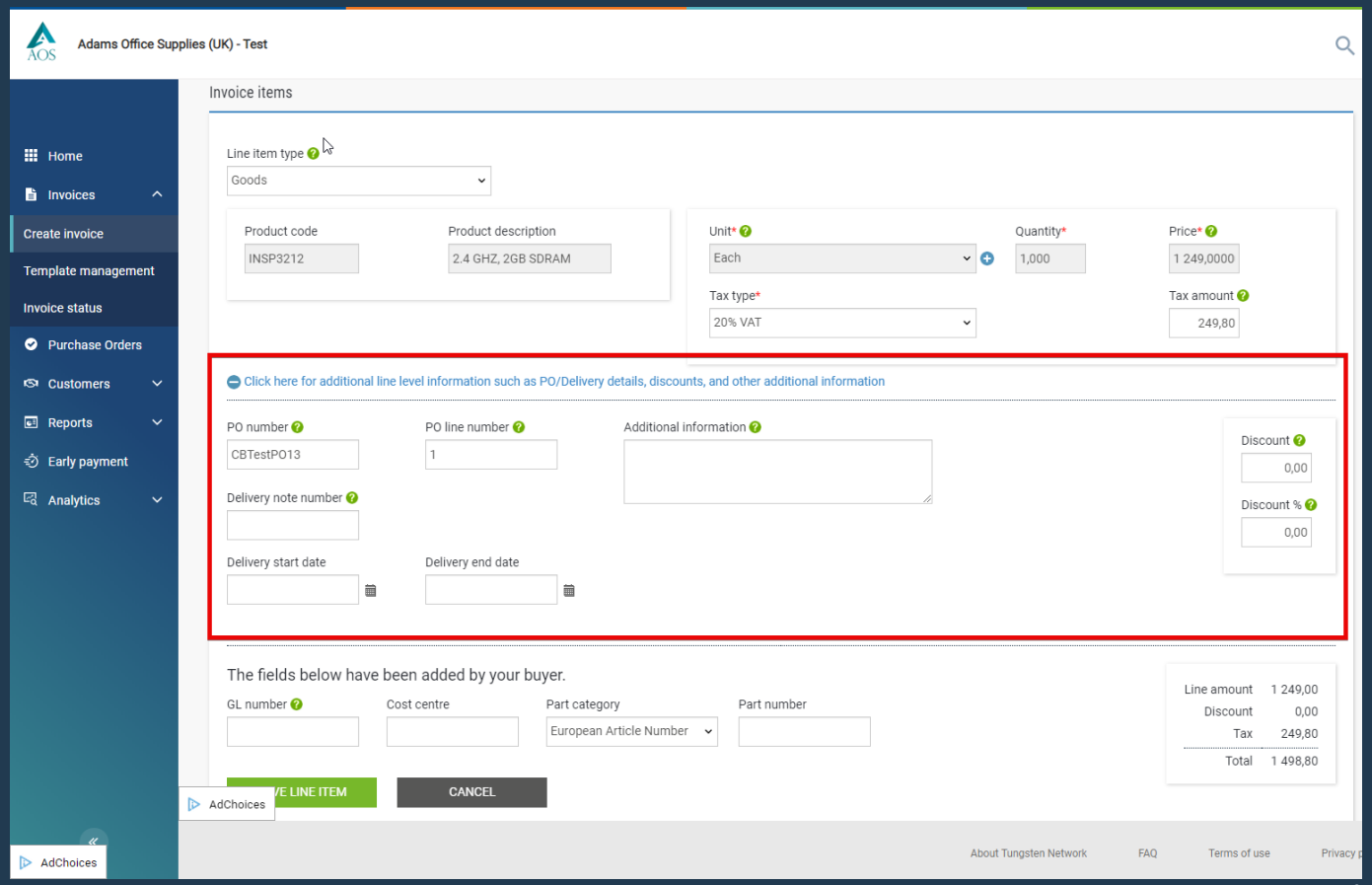
22. Your currency and purchase order number should not be changed. The invoice will be validated against the purchase order details available in the system. If header and line level details do not match the purchase order data, your invoice is subject to rejection by Tungsten Network.



23. It's important to note again, line items details should not be modified. These details were provided to Tungsten Network by your customer.

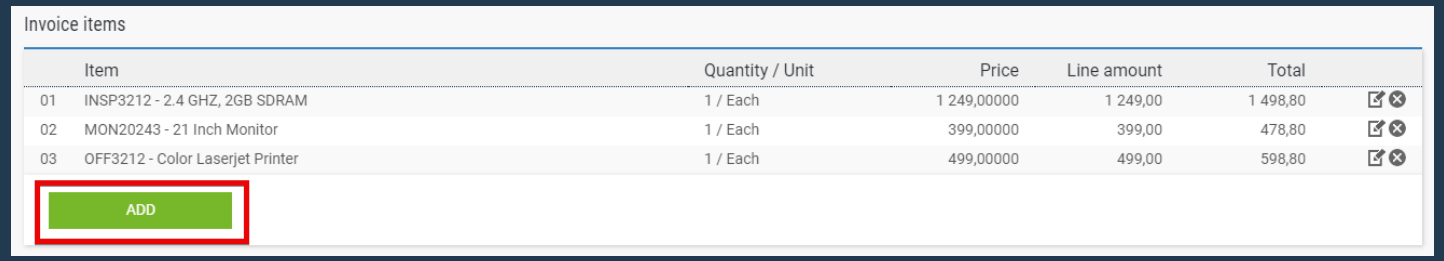
- *The Goods or Service lines should only be modified to provide additional information and/or a date range.*
- *For example, work performed between January 1st and January 15th. It's best to follow standard invoicing practices when referencing line item discounts and/or entering additional information 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.*

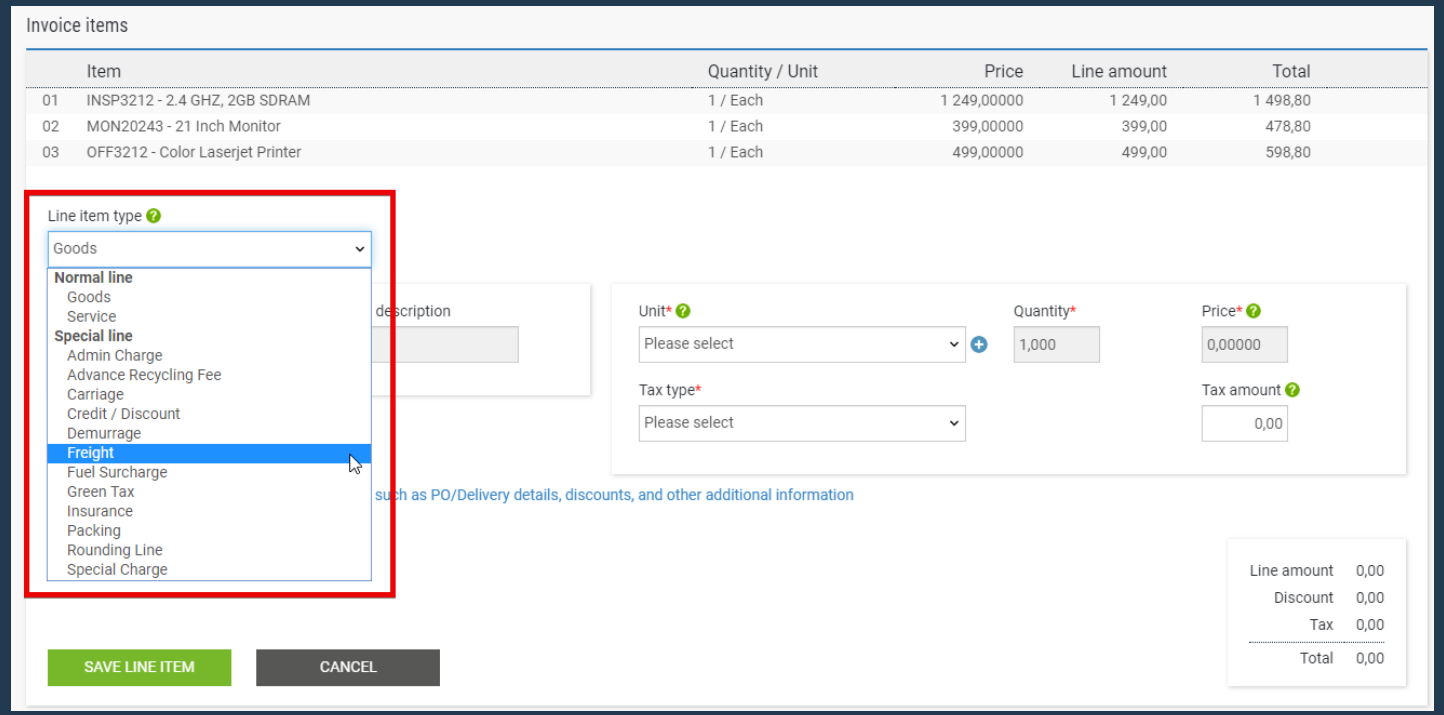




24. You can add Special Line Items. These are items such as fuel charges, freight, admin charges, green tax etc

- *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 drop-down 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".*





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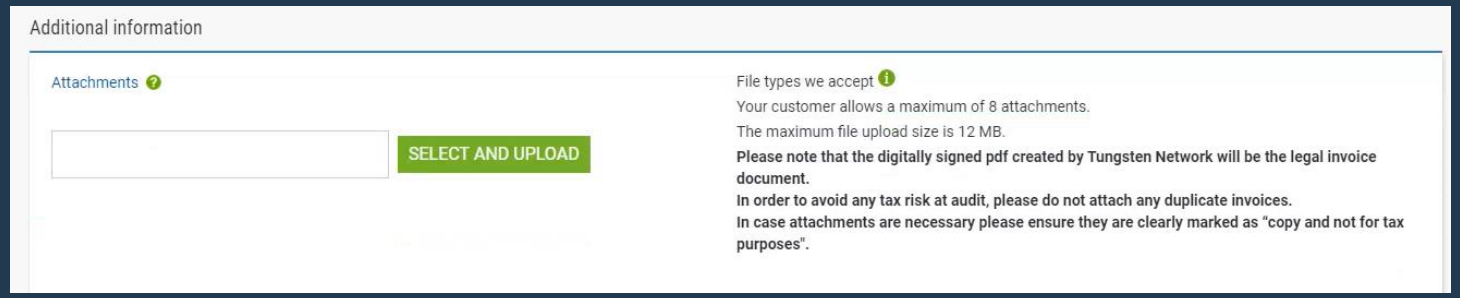
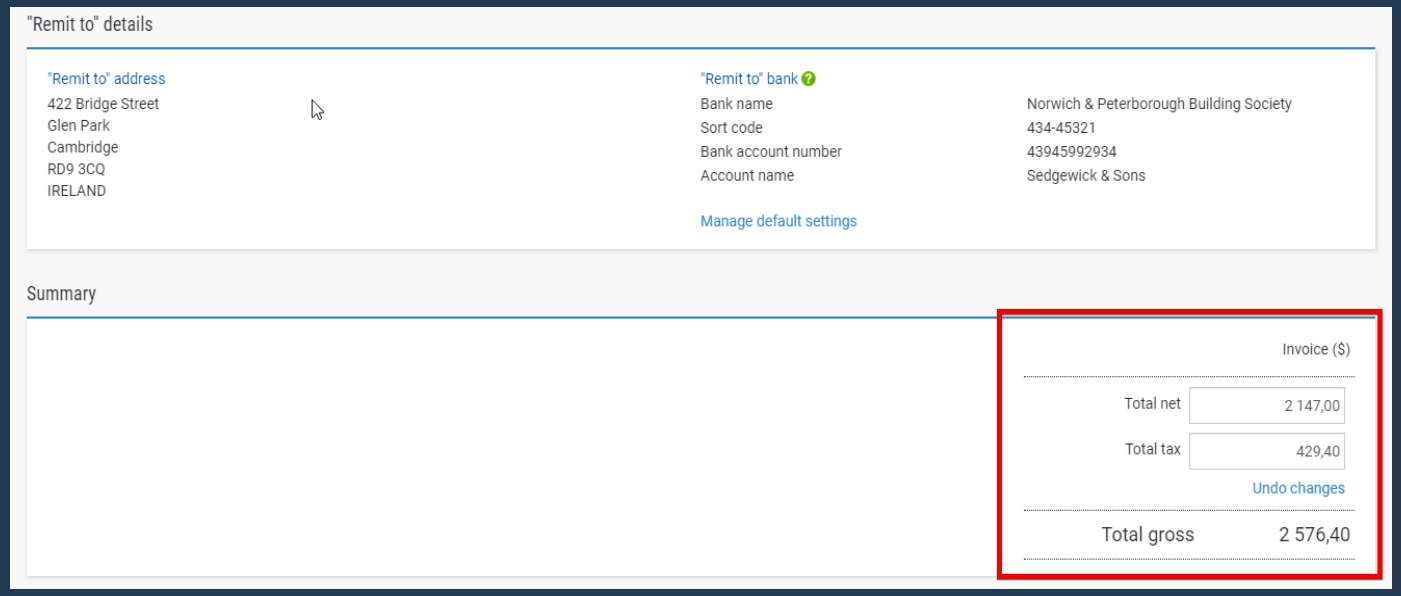
26. If you have attachments to send with your invoice, add these prior to submitting your invoice.

- ***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.*





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.*

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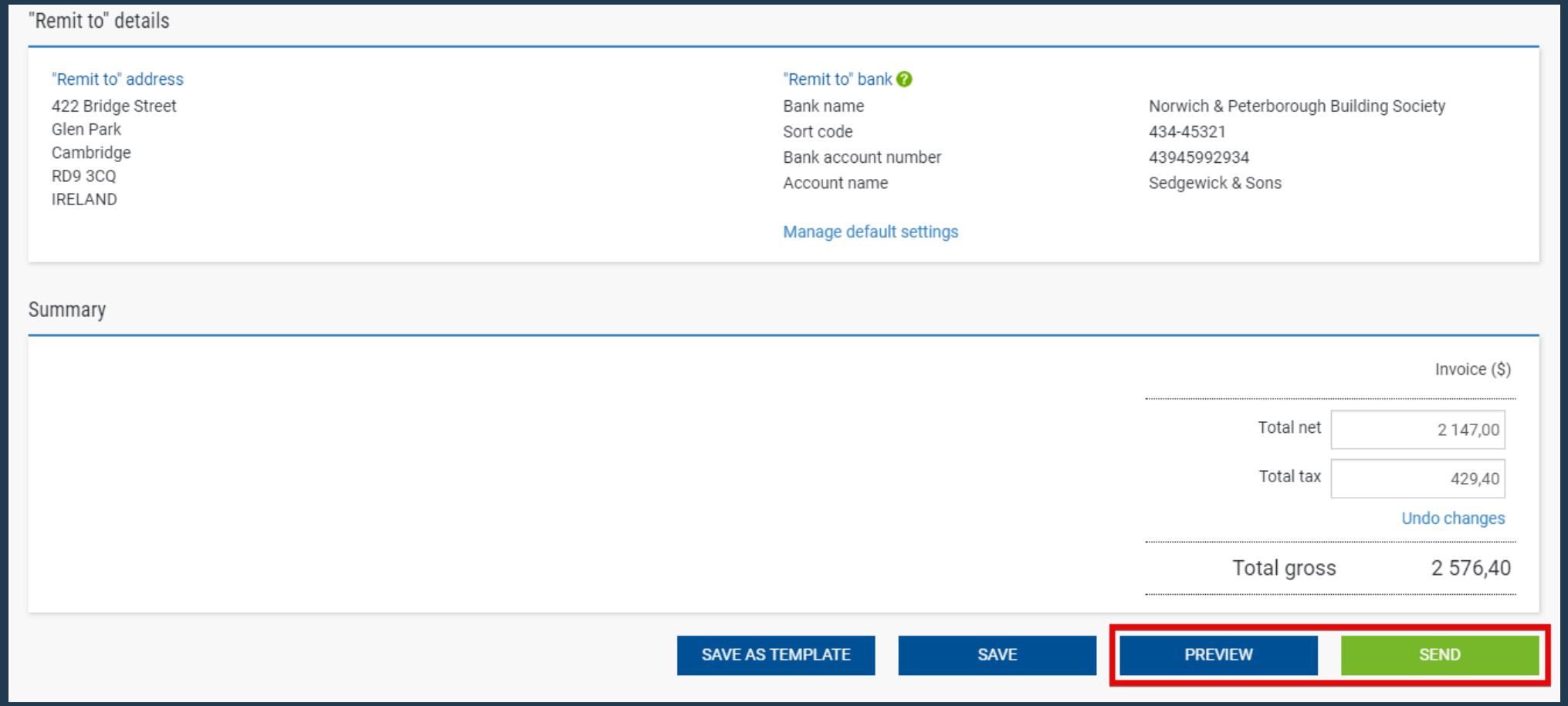
28. Please “Preview” your invoice prior to submitting it. If all the details are correct, press “Send” at the bottom of the page to submit your invoice. You’re now done.



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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 Help & Support 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

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Have a good day

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