



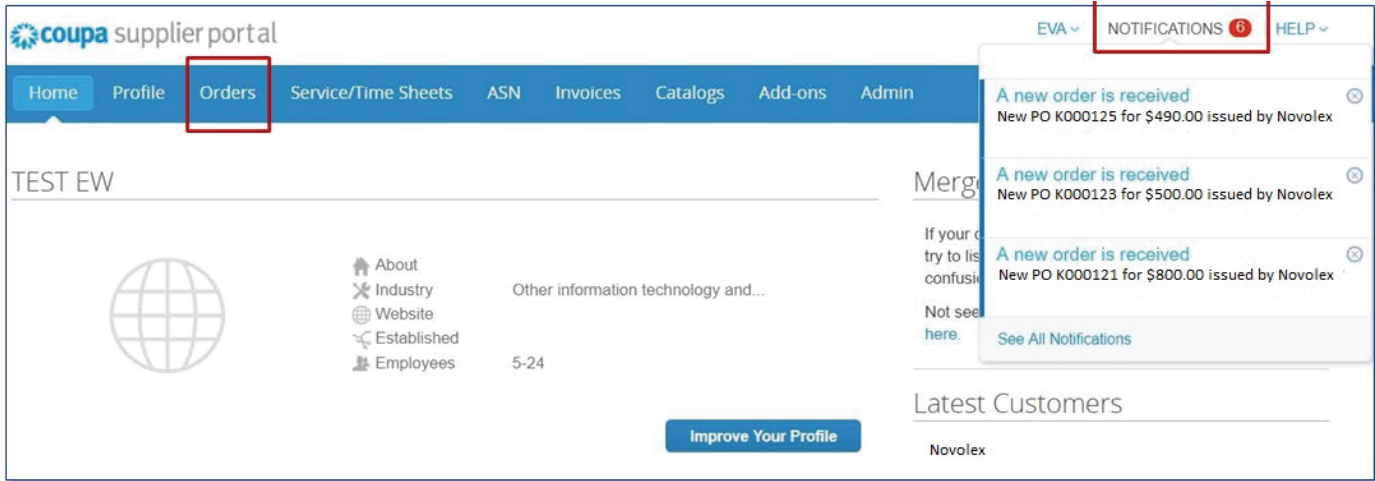
FLIPPING A PO INTO AN INVOICE

EFFECTIVE DATE

June, 2023

VIEWING A PO

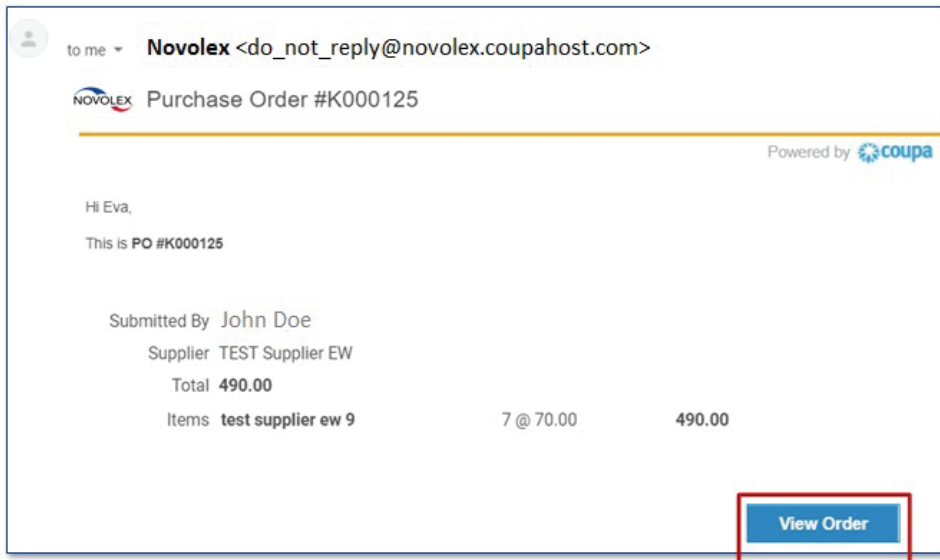
When Novolex issues a Purchase Order you will receive a notification in the CSP. You will be able to view the purchase order directly in the CSP under the Orders section.



If you enable email notification for POs, you will receive an email notification for the new PO.

Open the email and click View Order.

This will open the CSP - where you can view the PO.



VIEWING A PO Continued

1. Status: The status of the PO.
2. Order Date: The date that the PO was created.
3. Revision Date: Date the PO was revised. If the PO does not have any revisions this will be the same as the Order Date.
4. Requester: The name of the Requester.
5. Email: The E-mail address of the Requester.
6. Payment Term: Payment term.
7. Attachments: Attachment from Requester.
8. Acknowledged: Allows you to acknowledge the purchase order
9. Shipping: The ship-to address.
10. Terms: Shipping terms.
11. Select Customer: The name of the customer that sent that PO.

Select Customer: Novolex ▼ Configure PO Delivery

Purchase Order #K000125

Status: Issued - Pending Manual

Order Date: 05/01/19

Revision Date: 05/01/19

Requester: John Doe

Email: John.Doe@Novolex.com

Payment Term: Net 60

Attachments: None

Acknowledged:

Shipping

Ship-To Address: Novolex Shields, LLC
1009 ROCK AVE
YAKIMA, WA
98902-4629

Terms: Delivered

11. Lines: Line-level information for each item.
12. Print View: Allows you to view the print view of the PO.
13. Add Comment: Allows you to add comments to KPMG LLP.
14. Create Invoice: Allows you to flip the PO to an invoice.

Lines

Advanced Search Sort by Line Number: 0 → 9 ▼

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		test supplier ew 9	7	Each	70.00	490.00	0.00

Need By: 05/31/19 Part Number: None

Per page: 15 | 45 | 90

Total: 490.00

Create Invoice Save Print View

Comments

Add Comment

VIEWING A PO Continued

Clicking on Print View will allow you to view a print friendly version of the PO - which will also include terms and conditions.

NOVOLEX

SUPPLIER NAME
Street 1
Street 2
City, State Zip
Email

PO NUMBER: K000266
DATE: 11/06/2019
PAYMENT TERMS: Net 60
MODE OF DELIVERY:
TERMS OF DELIVERY: Delivered at Place
SHIPPING INSTRUCTIONS: Ground
CURRENCY: USD
CONTRACT: 5
CONTACT: John Doe
John.Doe@Novolex.com

Ship To
Novolex Shields, LLC
1009 ROCK AVE
YAKIMA, WA 98902-4629

Bill To
Novolex
50 E Rivercenter Blvd
Suite 650
Covington, KY 41011

Line	Description	Need by Date	Qty	Unit	Price	Total
1	Executive Chair Black	30/06/2019	1	Each	49.99	49.99

49.99

Supplier acknowledges, accepts, and agrees that this Purchase Order is governed by Novolex Holdings, LLC standard terms and conditions posted at <http://novolex.com/termsandconditions>

Suppliers submitting invoices via email must adhere to the following rules:

- Invoice file must be in a readable PDF format
- Any corresponding PO # or Contact Name listed in the header
- Only one (1) invoice per PDF file
- Email with PDF attachment sent to Invoices@Novolex.com

ACKNOWLEDGING A PO

To acknowledge the PO, click the Acknowledged checkbox.

Purchase Order #K000125

Order marked as sent manually and acknowledged

Status: Issued - Pending Manual

Order Date: 05/01/19

Revision Date: 05/01/19

Requester: John Doe

Email: John.Doe@Novolex.com

Payment Term: Net 60

Attachments: None

Acknowledged

Shipping

Ship-To Address: Novolex Shields, LLC
1009 ROCK AVE
YAKIMA, WA
98902-4629

Terms: Delivered

■ ACKNOWLEDGING A PO: ADDING COMMENTS

To add a comment for Novolex, enter your comment in the Comments box at the bottom of your PO and then click Add Comment.

0 Comments

Hi, can you specify the colour that you want?

Add Comment

When Novolex responds, you will receive a notification in your email and CSP and will also be able to see their response here. All comments entered here will be viewable to Novolex.

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines

Select Customer

Purchase Orders

NOTIFICATIONS 7

- A new comment is received
New Comment from Novolex
- A new order is received
New PO K000125 for \$490.00 issued by Novolex
- A new order is received
New PO K000123 for \$500.00 issued by Novolex

See All Notifications

Primary	Social	Promotions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Novolex		
Comment on Purchase Order # 125 - FYI: New Purchase Order Comment		
00:09		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Novolex		
New Comment on PURchase Order for Novolex - New Comment from Novolex on Purchase Order # K000125		
00:09		

The comment history can be found in the Comments section at the bottom of the PO

2 Comments

Add Comment

Participants: John Doe

NOVOLEX John Doe On 05/02/19 at 12:09 AM

All in black please. Thank you.

Eva Wang On 05/02/19 at 12:02 AM

Hi, can you specify the colour that you want?

FLIPPING A PO INTO AN INVOICE

1. Click on the Orders tab.
2. Search for the purchase order to be invoiced and click on the gold coin stack icon to create the invoice.

Purchase Orders

Instructions From Customer
Test PO instructions for suppliers

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
K000134	05/02/19	Issued	05/02/19	8 Each of test supplier ew 9	No	320.00 GBP	
K000125	05/01/19	Issued	05/01/19	7 Each of test supplier ew 9	Yes	490.00 GBP	Create invoice
K000123	05/01/19	Issued	None	10 Each of test supplier ew 8	No	500.00 GBP	
K000121	04/30/19	Issued	None	8 Each of test supplier EW 7	No	800.00 GBP	
K000120	04/30/19	Issued	None	10 Each of test supplier EW 5	No	3,000.00 GBP	
K000117	04/30/19	Issued	04/30/19	20 Each of test 3	No	1,000.00 GBP	
K000102	04/24/19	Issued	None	10 Each of Test supplier EW 2	No	500.00 GBP	
K000101	04/24/19	Issued	None	10 Each of Test Supplier EW 1	No	1,000.00 GBP	

3. Complete header level fields. Please ensure that the information used to generate the invoice from Coupa is the same data from your own ERP system.

- Invoice # (No.): Enter the invoice number generated in your own ERP system.
- Invoice Date: Today (or backdated up to 60 days)
- Payment Terms: The payment terms from the PO.
- Currency: The currency from the PO.
- Status: Current status of this invoice.
- Image Scan: Please do NOT attach a copy of an invoice from your system. As per the T&Cs agreed, Coupa will issue the legal invoice on your behalf.

Please NOTE:

- Invoices backdated beyond 60 days will be on hold and disputed if needed.
- For compliant invoicing countries, it is technically not possible to future date invoices.
- For non-compliant invoicing countries, it is technically possible to future date invoices, but will be auto disputed.

General Info

* Invoice #

* Invoice Date 05/02/19

Payment Term Net 60

Date of Supply 05/02/19

* Currency USD

Delivery Number

Status Draft

Image Scan No file chosen

Supplier Note

Attachments Add File | URL | Text

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

From

* Supplier TEST Supplier EW

* Tax ID GB112345678

* Invoice From Address Test Supplier EW
1 test
Bristol
1X 2XX
United Kingdom
limited

* Remit-To Address Test Supplier EW
1 test
Bristol
1X 2XX
United Kingdom

* Ship From Address Test Supplier EW
1 test
Bristol
1X 2XX
United Kingdom

To

Customer Novolex

* Bill To Address 50 E Rivercenter Blvd
Suite 650
Covington KY
41011

Ship To Address 1009 Rock AVE
Yakima, WA
98902-4629

FLIPPING A PO INTO AN INVOICE Continued

Supplier Note: Enter any notes for Novolex.

Attachments: Attach supporting documentation; all types of attachments are supported. If requested by Novolex, please upload your breakdown of costs in the agreed Coupa format here (Excel).

Cash Accounting Scheme: Leave blank if not relevant.

Early Payment Provisions: Leave blank if not relevant.

Margin Scheme: Leave blank if not relevant.

Supplier: Your company name.

TAX ID: Choose the TAX ID that you set up in the E-invoicing section in Admin. If you have multiple TAX registrations please ensure you choose the correct TAX registration based on the Country you have supplied your goods or services. Coupa will have different invoicing rules based on the Country of the TAX registration that you have selected for the invoice (and in line with the TAX or VAT law of that country).

Invoice From Address: Choose the Invoice From Address that you set up in your E-invoicing section in Admin for this invoice.

Remit-To Address: Choose the Remit-To Address that you set up in your E-invoicing section in Admin for this invoice.

Ship From Address: Choose the Ship From address that you set up in your E-invoicing section in Admin for this invoice. If you have multiple, please ensure it is the correct address which relates to where the goods are shipped from for this specific transaction.

Customer: This will always default to Novolex.

Bill to Address: The Bill To address from the PO.

Ship To Address: The Ship To address from the PO.

Please NOTE: You can add multiple From info in the E-Invoicing section under Admin and select these options by clicking the search icon.

■ FLIPPING A PO INTO AN INVOICE Continued

The screenshot shows a software interface for a Purchase Order (PO) line item. At the top left, a tab labeled "Lines" is highlighted with a red box. The main form contains several fields: "Type" (with a trash icon), "Description" (containing "test supplier ew 9"), "Qty" (containing "7"), "UOM" (containing "Each"), and "Price" (containing "70.00"). A red box highlights the "Price" field, and a larger red box highlights the total price "490.00" with a red 'x' icon. Below these fields are sections for "PO Line" (K000125-1), "Contract" (TEST Contract EW), and "Supplier Part Number". There is also a "Billing" section (3--CC2-1010101) and a "Taxes" section with a "Tax Rate" dropdown (highlighted with a red box), "VAT Amount" (0.00), and "Tax Reference" field. At the bottom left, there is an "Add Tag" button and a green "+ Add Line" button (highlighted with a red box). At the bottom right, there is a "Totals & Taxes" section.

4. Complete line level information. Here you may edit the Quantity/Price if you are sending a partial invoice. You can also add additional lines by clicking on Add Line or delete lines by clicking on the delete icon.

5. You will need to add Taxes by adding a TAX / VAT Rate for each line level item.

Please NOTE: it is important the TAX / VAT rate is an accurate determination of the line-item description and invoice place of supply. This should be something that can be copied from your ERP system

6. After adding TAX / VAT Rate for all the line level items click Calculate. This will then work out the new total.

This screenshot shows the same software interface as the previous one, but with a new line item added. The "Description" field now contains "Shipping Cost" and the "Price" field contains "20.00". The "Tax Rate" dropdown is still highlighted with a red box. The "Add Line" button is also highlighted with a red box. To the right of the main form is a "Totals & Taxes" summary panel. It shows: "Lines Net Total" 490.00, "Lines Tax Total" 0.00, "Total Tax" 0.00, "Net Total" 490.00, and "Gross Total" 490.00. At the bottom of the summary panel, there are buttons for "Delete", "Cancel", "Save as Draft", "Calculate" (highlighted with a red box), and "Submit". Below the summary panel is a "Comments" section.

Please Note: If applicable, all Shipping Costs should be communicated with the requestor upfront. The requestor will insert a line level item for the shipping cost on the PO. You can then flip that PO into an invoice with a line of shipping charge and complete the TAX / VAT Rate for the shipping to this line and invoice against it.

You should NOT add a new line for shipping cost while creating the invoice, as this will cause failure in the auto- matching of the PO and the invoice, putting your invoice on hold and delaying your payment.

■ FLIPPING A PO INTO AN INVOICE Continued

7. To add a comment for Novolex, enter your comment in the Comments box and then click on Add Comment.

- When Novolex responds, you will receive a notification and will also be able to see their response here.
- All comments entered will be viewable to Novolex. The comment function for invoices is the same as it for PO that you can find on pages 10 & 11.
- If you want to save the invoice for later, click Save as draft. If you are ready to submit the invoice, click Submit and then click Send Invoice in the pop-up confirmation window.

The screenshot displays the invoice creation interface. At the top right, a 'Totals & Taxes' summary shows: Lines Net Total (490.00), Lines Tax Total (0.00), Total Tax (0.00), Net Total (490.00), and Gross Total (490.00). Below this are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A 'Comments' box is located below the buttons. A confirmation dialog titled 'Are You Ready to Send?' is open, containing the text: '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.' The dialog has 'Continue Editing' and 'Send Invoice' buttons. A red box highlights the 'Add Comment' button in the bottom right corner of the main interface.

Please Note: If applicable, all Shipping Costs should be communicated with the requestor upfront. The requestor will insert a line level item for the shipping cost on the PO. You can then flip that PO into an invoice with a line of shipping charge and complete the TAX / VAT Rate for the shipping to this line and invoice against it.

You should NOT add a new line for shipping cost while creating the invoice, as this will cause failure in the auto-matching of the PO and the invoice, putting your invoice on hold and delaying your payment.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

The Novolex name and logo are registered trademarks or trademarks of Novolex Holdings, LLC.



www.novolex.com | 800-845-6051 | ©July 2023 Novolex

Novolex Corporate Headquarters | 101 E Carolina Ave Hartsville, SC 29550
N_O_1580_0723

