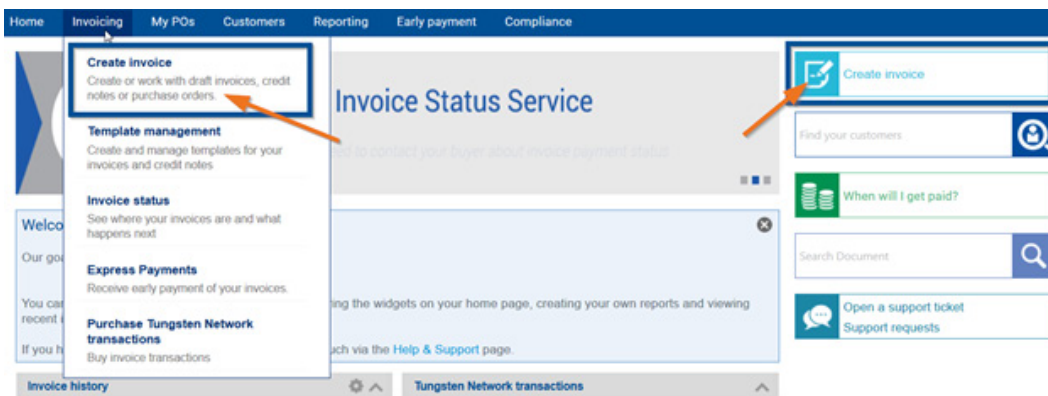


How to...

create an invoice/credit note

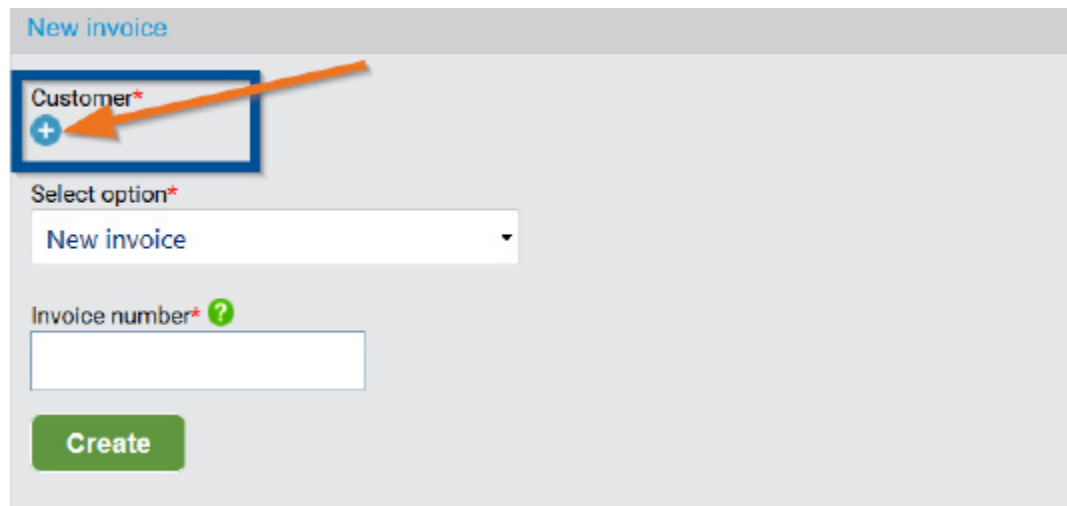
STEP 1: Select create invoice



Requirement(s):

- Click 'Invoicing'
- Click 'Create invoice'

STEP 2: View your customer list



Requirement(s):

- Click the blue symbol

The **Create Invoice** button gives you the ability to:

1) Submit invoices or credit notes to your customer electronically via Tungsten Network.

2) Add contact and shipping details to your electronic submission

3) Add regular and special line items to your electronic submission

4) Add supporting documentation such as attachments to your electronic invoice or credit note submission.

To begin the submission process:

- 1) Click 'Invoicing'
- 2) Click 'Create Invoice'
- 3) Click the **blue** symbol to select your customer

How to...

create an invoice/credit note

STEP 3: Select your customer from list

Demonstration Example Buyer/Customer

AAA162858005	333
N/A	Lakeside Drive
N/A	Foster City
	CA
	94401
	UNITED STATES

Select Customer

Requirement(s):

- Click 'Select Customer'

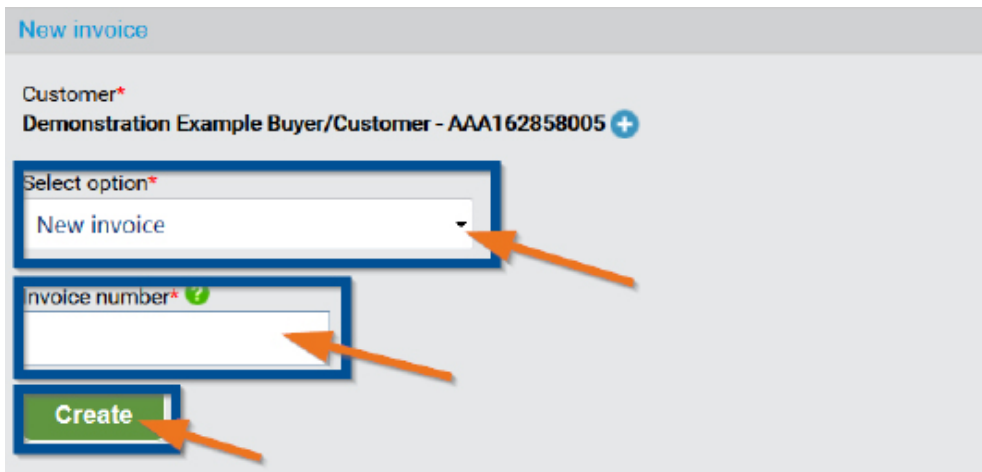
To begin the creation process, you must select your customer from the list.

1) Click 'Select customer'

*If your customer is unavailable, please select 'Customers' from the main menu bar. Then select 'Connect with a customer'.

If you would like more information in regards to connecting with your customer, please visit our Help & Support archive to view the 'How to connect with your customer' guide and/or video.

STEP 4: Create invoice or credit note



Requirement(s):

- Click 'Select option'
- Enter invoice or credit note number
- Click 'Create'

2) Once you have selected your customer, you must confirm if you are submitting an invoice or credit note.

3) Enter the invoice or credit note number.

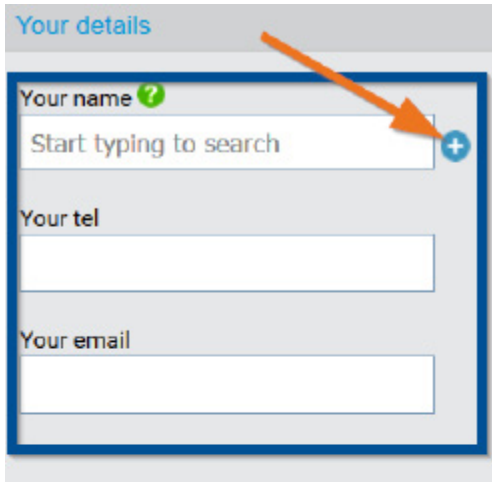
*Tungsten Network does not allow entry of duplicated invoice or credit note numbers. Please ensure each document number is unique upon entry.

4) Click 'Create' to continue with the creation process.

How to...

create an invoice/credit note

STEP 5: Enter contact to/contact from details



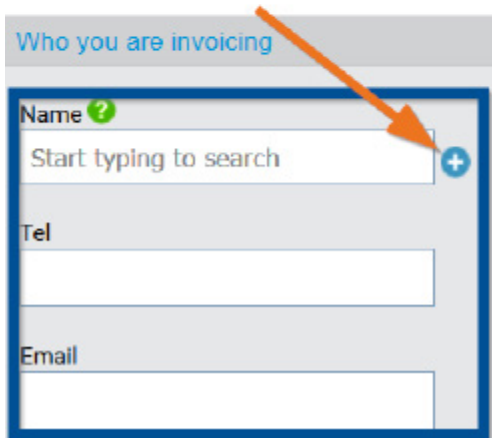
Your details

Your name [?]
Start typing to search +

Your tel

Your email

An orange arrow points to the blue '+' symbol in the search field.



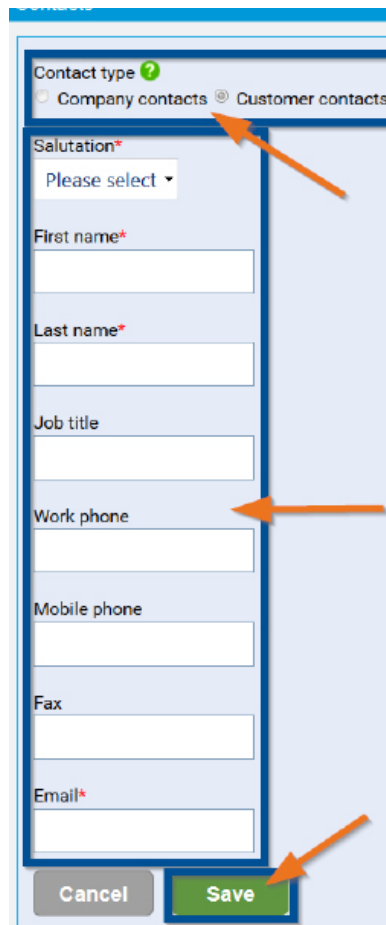
Who you are invoicing

Name [?]
Start typing to search +

Tel

Email

An orange arrow points to the blue '+' symbol in the search field.



Contact type [?]
☐ Company contacts ☒ Customer contacts

Salutation*
Please select ▼

First name*

Last name*

Job title

Work phone

Mobile phone

Fax

Email*

Cancel Save

Orange arrows point to the 'Customer contacts' radio button, the 'Salutation' dropdown, the 'Work phone' field, and the 'Save' button.

→ Requirement(s):

- Select blue symbol
- Enter contact details
- Click 'Save'
- Enter contact details in the 'Your Name' field

Enter your contact details and/or the contact details of your customer.

1) Click the **blue '+'** symbol to add contact details to the internal template.

*The internal template was designed to save time when entering contact details into your electronic invoice or credit note.

2) Once your contact details have been entered into the internal template, click 'Save'.

3) To populate the contact fields, enter the contact name in the 'Your name' field.

*The Tungsten Network system will auto complete the section on your behalf.

How to...

create an invoice/credit note

STEP 6: Enter ship to/ship from details

Demonstration Example Buyer/Customer
333
Lakeside Drive
Foster City
California
94401
UNITED STATES

☒ Click here if the 'Ship to' details are different from the 'Invoice to' details.

Company name*
Start typing to search

Country*
Please select

Address 1*

Address 2

Address 3

Address 4

Address 5

Postcode

VAT registration number* ?

Company name*

Country*
Please select

Address 1*

Address 2

Address 3

Address 4

Address 5

Postcode

VAT registration number* ?

Requirement(s):

- Click 'Click here if the ship to/ship from details are different...'
- Select blue symbol
- Enter ship to/ship from details into template
- Click 'Save'
- Enter 'Company Name'

Enter your ship to details and/or the ship from details on your electronic invoice or credit note.

1) To begin, click 'Click here if the Ship to/Ship from details are different from the invoice to/from details.'

2) Next, click the blue '+' symbol to add shipping details to the internal template.

3) Once your contact details have been entered into the internal template, click 'Save'.

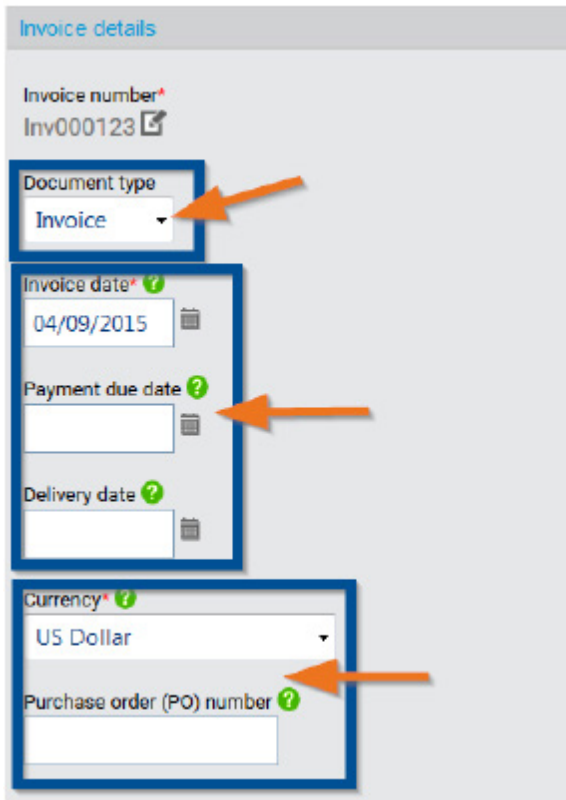
4) To populate the shipping fields, enter the shipping name in the 'Company name' field.

*The Tungsten Network system will auto complete the section on your behalf.

How to...

create an invoice/credit note

STEP 7: Enter invoice header details



The screenshot shows the 'Invoice details' form. It includes fields for 'Invoice number' (Inv000123), 'Document type' (Invoice), 'Invoice date' (04/09/2015), 'Payment due date', 'Delivery date', 'Currency' (US Dollar), and 'Purchase order (PO) number'. Orange arrows point to the 'Document type' dropdown, the 'Invoice date', 'Payment due date', and 'Delivery date' calendar icons, the 'Currency' dropdown, and the 'Purchase order (PO) number' field.

Requirement(s):

- Confirm 'Document type' is valid
- Use the calendar symbol to enter:
 - Invoice date
 - Payment due date
 - Delivery date (if applicable)
- Confirm 'Currency' is valid
- Enter 'Purchase order (PO) number' (if applicable)

It's important to ensure your document type, dates, currency and purchase order number are valid prior to submitting your electronic invoice or credit note.

1) Click the dropdown menu to confirm your document type (invoice/credit note).

2) Please use the calendar to select the following dates:

- Invoice date
- Payment due date
- Delivery date

3) Click the dropdown menu to confirm your currency is valid.

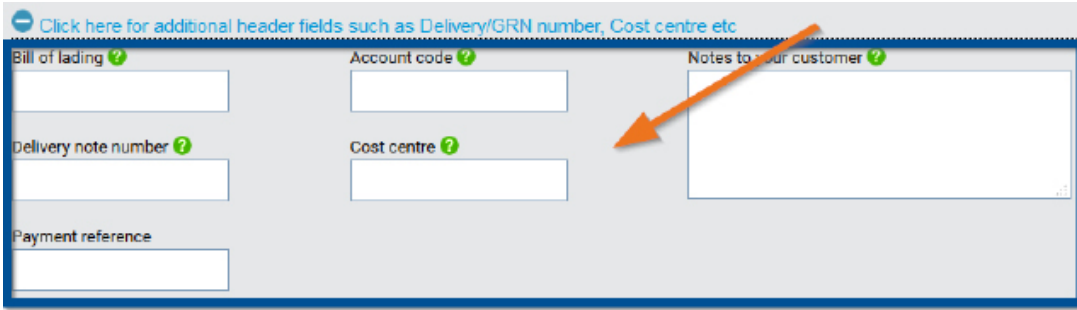
4) Enter your purchase order number exactly as it appears on your contract/purchase order from your customer.

*If you were not provided a purchase order number by your customer, please ensure your customer's contact details are entered in the 'Who are you invoicing' fields.

How to...

create an invoice/credit note

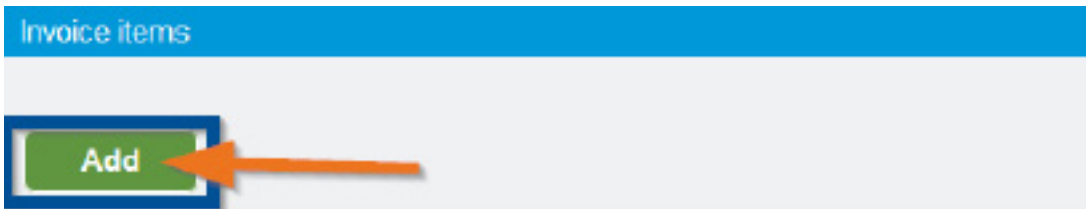
STEP 8: Enter additional invoice header information



Requirement(s):

- Enter 'Bill of lading' (if applicable)
- Enter 'Account code' (if applicable)
- Enter 'Delivery note number' (if applicable)
- Enter 'Payment reference' number (if applicable)
- Enter 'Cost centre' (if applicable)
- Enter 'Notes to your customer' (if applicable)

STEP 9: Adding a regular line item



Requirement(s):

- Click 'Add'

The Tungsten Network system allows entry of additional invoice or credit note header information.

1) To begin, click 'Click here for additional header fields such as delivery/GRN, cost centre, etc...'

Enter data in all applicable fields.

*Regular line items are mandatory for all invoice or credit note submissions.

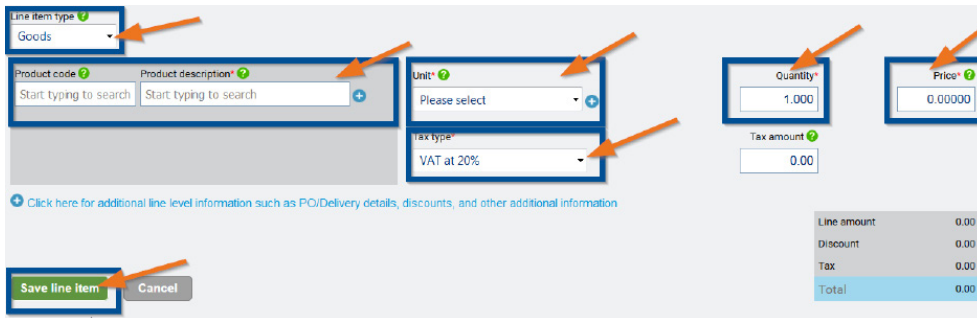
1) To begin, click 'Add'

The system will then request line item details such as description, quantity, unit of measurement and unit price.

How to...

create an invoice/credit note

STEP 10: Enter regular line item details



Line item type: Goods

Product code: Start typing to search

Product description: Start typing to search

Unit: Please select

Quantity: 1.000

Price: 0.00000

Tax type: VAT at 20%

Tax amount: 0.00

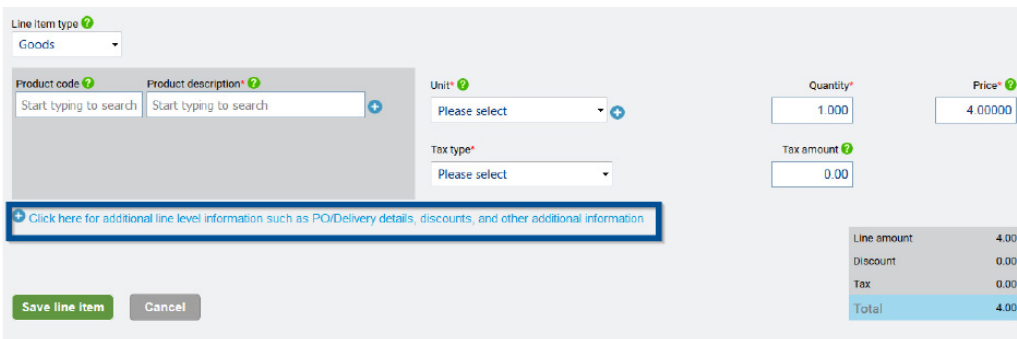
Click here for additional line level information such as PO/Delivery details, discounts, and other additional information

Save line item Cancel

Requirement(s):

- Confirm 'Line item type'
- Enter 'Product code' and 'Product description'
- Select 'Unit'
- Enter 'Quantity'
- Enter 'Price'
- Enter 'Tax type' (if applicable)

STEP 11: Enter additional line item details



Line item type: Goods

Product code: Start typing to search

Product description: Start typing to search

Unit: Please select

Quantity: 1.000

Price: 4.00000

Tax type: Please select

Tax amount: 0.00

Click here for additional line level information such as PO/Delivery details, discounts, and other additional information

Save line item Cancel

Requirement(s):

- Click 'Click here for additional line level information...'

1) Select your line item type from the dropdown menu.

*The first line item must be a regular line item (goods or services).

2) The following fields are mandatory:

- Product code
- Product description
- Unit (unit of measurement)
- Quantity
- Price
- Tax type (if applicable)

*The system will multiply your quantity by your price to determine the line net.

3) If you have additional line level information, click 'Click here for additional line level information...'

4) After all line item details have been entered, click 'Save line item'.

How to...

create an invoice/credit note

STEP 12: Enter additional line item details cont'd

Click here for additional line level information such as PO/Delivery details, discounts, and other additional information

PO number PO line number Additional information

Delivery note number

Service delivery start date Service delivery end date

The fields below have been added by your buyer.

GL number Cost centre Part category Part number

European Article Number

Save line item Cancel

Discount 0.00
Discount % 0.00

Line amount	4.00
Discount	0.00
Tax	0.00
Total	4.00

Requirement(s):

- Enter additional line level information if applicable
- Click 'Save line item'

STEP 13: Adding a special line item

Invoice items

Add

Requirement(s):

- Click 'Add'

1) Enter all applicable information into the appropriate fields.

*If entering a date range, please use the calendar to select your start and end date.

2) Once all additional regular line item details have been added, click 'Save line item'

*To add additional regular line items, repeat steps 9-12 as shown in this guide.

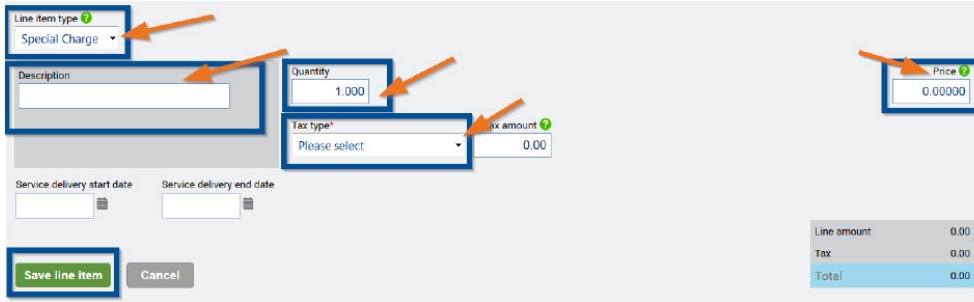
To add a special line item, click 'Add'.

*The system does not accept invoices or credit notes that only reference special line items. All invoices must contain at least one regular line item.

How to...

create an invoice/credit note

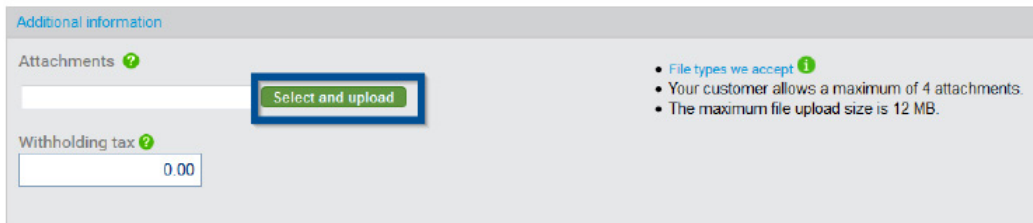
STEP 14: Enter special line item details



Requirement(s):

- Select 'Line item type'
- Enter 'Description'
- Enter 'Quantity'
- Enter 'Price'
- Enter 'Tax type'
- Enter 'Service delivery start/end date' (if applicable)
- Click 'Save line item'

STEP 15: Adding an attachment



Requirement(s):

- Click 'Select and upload'

1) Select line item type from dropdown menu

*You must choose special line type.

2) The following fields are mandatory:

- Product description
- Quantity
- Price
- Tax type (if applicable)
- Service delivery start/end date (if applicable)

3) Once all additional special line item details have been added, click 'Save line item'

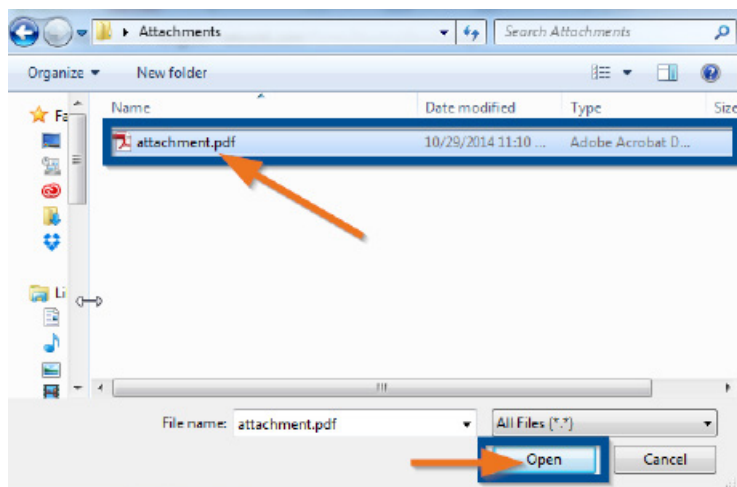
Tungsten Network accepts supporting documentation with your electronic invoice or credit note submission.

1) To add an attachment, click 'Select and upload'

How to...

create an invoice/credit note

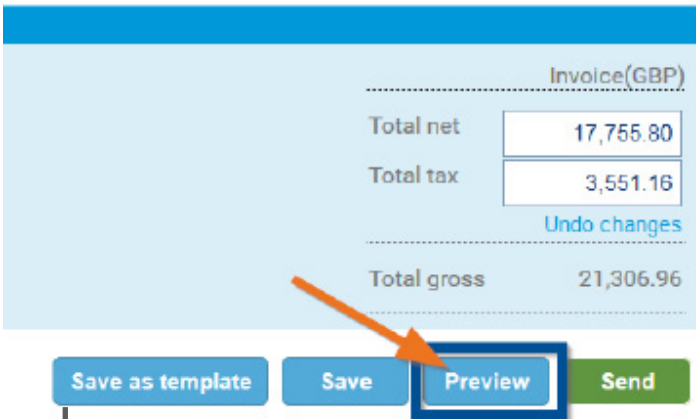
STEP 16: Selecting your attachment



Requirement(s):

- Locate the attachment
- Select the attachment
- Click 'Open'

STEP 17: Preview prior to submission



Requirement(s):

- Click 'Preview'

Search for your attachment on your local or shared drive.

2) Select the attachment

3) Click 'Open'

It's best to review your invoice or credit note prior to submitting to Tungsten Network for processing.

To review your invoice or credit note, click 'Preview'

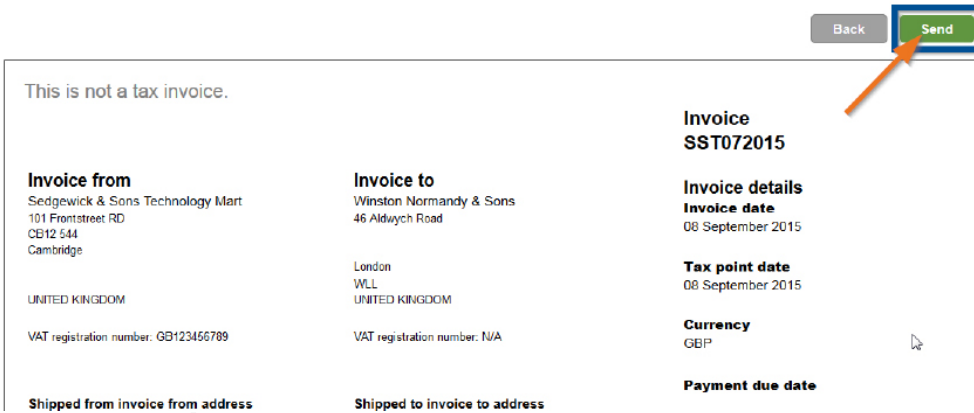
How to...

create an invoice/credit note

STEP 18: Submitting your invoice or credit note

Review the information you have entered

This is not an exact representation of your final invoice. If you are happy with the information you have provided, click 'Send' and we will create and send your legal invoice.



This is not a tax invoice.

Invoice from
Sedgewick & Sons Technology Mart
101 Frontstreet RD
CB12 544
Cambridge
UNITED KINGDOM
VAT registration number: GB123456789

Invoice to
Winston Normandy & Sons
46 Aldwych Road
London
W1L
UNITED KINGDOM
VAT registration number: N/A

Invoice details
Invoice date
08 September 2015
Tax point date
08 September 2015
Currency
GBP
Payment due date

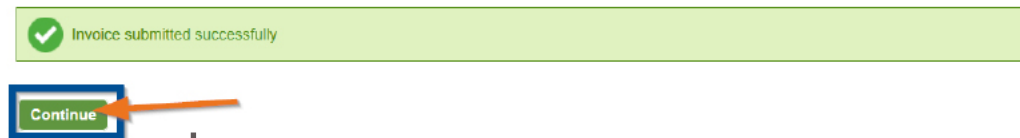
Shipped from invoice from address Shipped to invoice to address

- Requirement(s):
- Click 'Send'

STEP 19: Invoice or credit note submitted successfully

Review the information you have entered

This is not an exact representation of your final invoice. If you are happy with the information you have provided, click 'Send' and we will create and send your legal invoice.



✓ Invoice submitted successfully

Continue

- Requirement(s):
- Click 'Continue'

1) After reviewing your invoice or credit note, click 'Send'.

*The invoice or credit note will be processed by Tungsten Network. Once processed, Tungsten Network will send an email confirming the status of the submitted invoice or credit note.

*Please visit our **Invoice Status** page to obtain the most up to date information as it relates to your submitted invoice or credit note.

*If you would like more information in regards to **Invoice Status Service**, please visit our Help & Support archive to view the 'Invoice Status Service' guide and/or video.

2) Once the invoice or credit note has been submitted, click 'Continue' to create a new invoice or credit note.