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.
1. Status: The status of the PO.
2. Order Date: The date 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.

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

**ACKNOWLEDGING A PO**

To acknowledge the PO, click the Acknowledged checkbox.

**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

**Shipment**

- **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.

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

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

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.
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

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.

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.
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.

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.

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