How to Create an Invoice for Canada_Direct-Standard

Invoice Creation – Supplier View

Select Your Purchase Order → **Create your Invoice** → **Invoice Status**
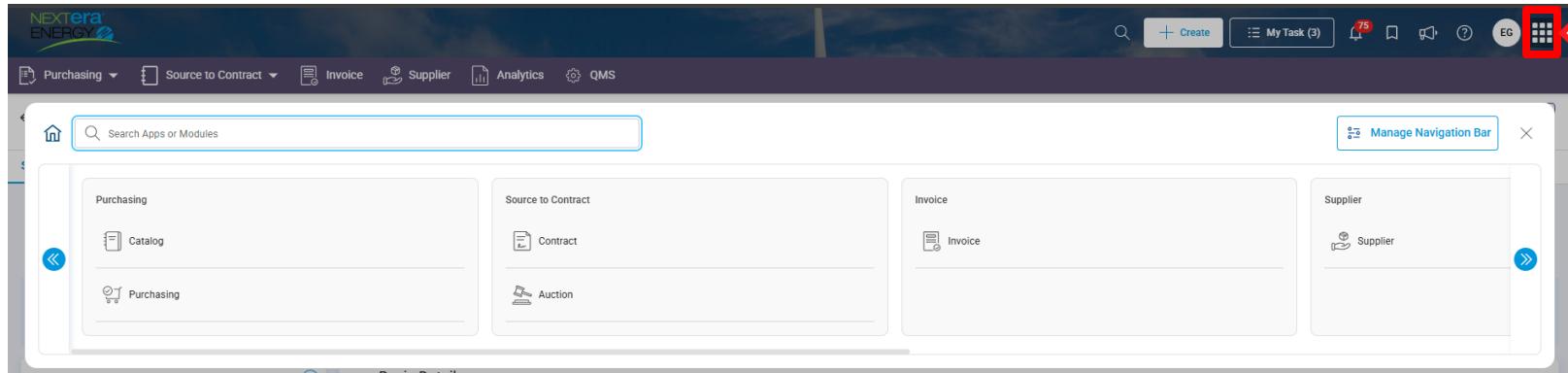
**1** Once you access the Supplier Profile page, click on the grid-shaped (Rubik's cube) icon i.e., the **'App Launcher' in the upper right-hand corner** to view Purchase Orders, Invoices, Supplier Profile etc. and navigate based on your preference.

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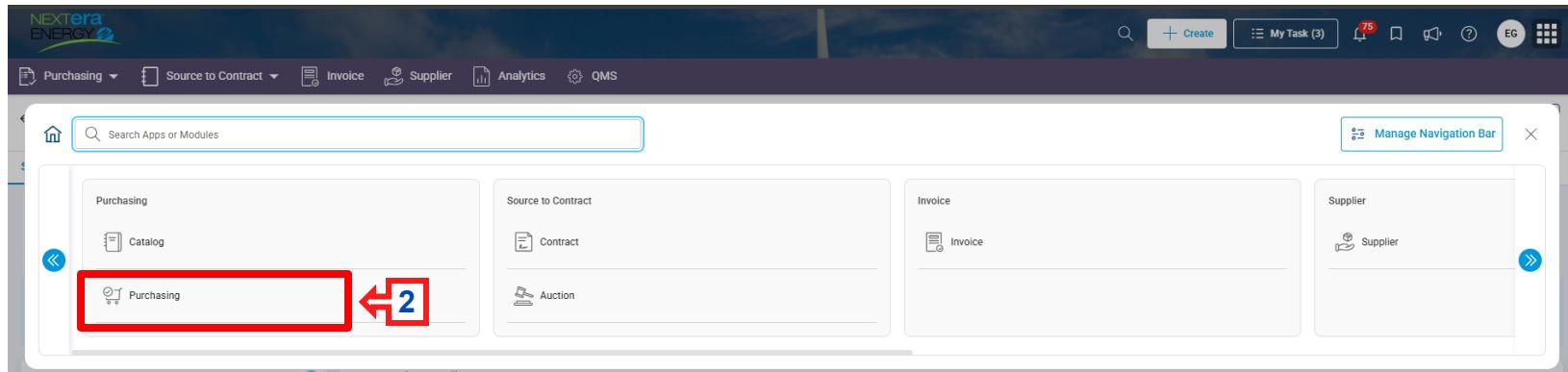
2 Then, select **'Purchasing'** from the menu. This will direct you to the Purchasing Section.

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3 Click on the **Purchase Order** tab.

4 To locate your **Direct Material Purchase order** , enter the **Purchase order number** into the search box.

You can also verify the **"Purchase Type"** in the selected purchase order number.

5 Click on the specific **Purchase order number** to continue.

Purchase Order Flip to e-Invoice

Select Your Purchase Order → **Create your Invoice** → **Invoice Status**

6 In the opened **Purchase order**, go to **Line Details** Section. Select the line items from the **Line Details** section, which you wish to flip to e-Invoice

7 Click on the "**Create Invoice**" button on top-right corner of screen.

Invoice Inputs - Supplier

Select Your Purchase Order → **Create your Invoice** → **Invoice Status**

8 Fill in all the mandatory fields of the **Basic Details** section: **Invoice Name, Invoice Amount, Supplier Invoice Number and Supplier Invoice Date**

Invoice Inputs - Supplier

Select Your Purchase Order → Create your Invoice → Invoice Status

9 In "**Supplier Details**", Enter the "**Tax Identification Country.**

In "**Tax Details**" Click on the hyperlink to View Tax Identification Details

10 A slider opens where you can verify your "**Tax Identification Details**" such as "**TIN Number.**

Invoice Inputs - Supplier

Select Your Purchase Order → **Create your Invoice** → Invoice Status

11 Similarly, fill in all the mandatory fields of **Supplier Details** section: **SWIFT Number, Account Number, Routing Number and Bank Name**

Invoice Inputs - Supplier

Select Your Purchase Order → **Create your Invoice** → **Invoice Status**

12 In the line details section, scroll right to taxes column. Click on **"Add Taxes"** Hyperlink on each line item to view the tax code details.

Invoice Inputs - Supplier

Select Your Purchase Order → **Create your Invoice** → Invoice Status

13 After clicking on hyperlink, a slider will open. Click **"Add"** button to enter the tax code details.

Invoice Inputs - Supplier

Select Your Purchase Order | **Create your Invoice** | Invoice Status

14 You may add the appropriate tax code types to the corresponding lines required.
(GST, HST, PST, QST)

15 Click the **"Apply"** button to confirm the added tax code.

16 You can verify the entered tax amount in the line details section.

Invoice Inputs - Supplier

Select Your Purchase Order | **Create your Invoice** | Invoice Status

17 Enter the total invoice amount along with **"Tax Amount"** and **"Special handling Charges"** (If Applicable) in the **"Invoice Amount"** under the basic details section.

Invoice Inputs - Supplier

Select Your Purchase Order → **Create your Invoice** → **Invoice Status**

18 Verify and "**Submit**" to confirm the line items to be invoiced.

19 Click on "**Yes**" on the confirmation pop-up to proceed.
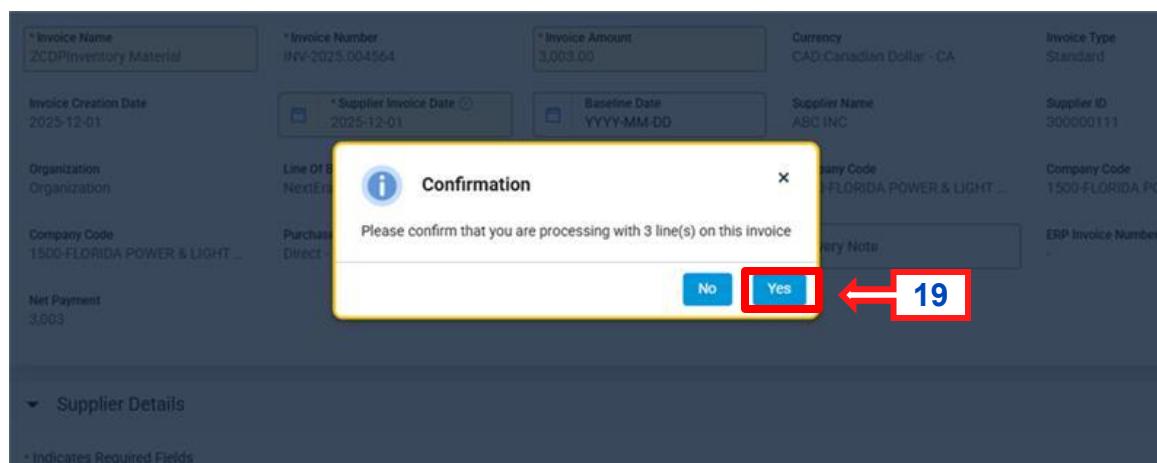
Confirmation

Please confirm that you are processing with 3 line(s) on this invoice

No   Yes   ← **19**

Invoice Inputs - Supplier
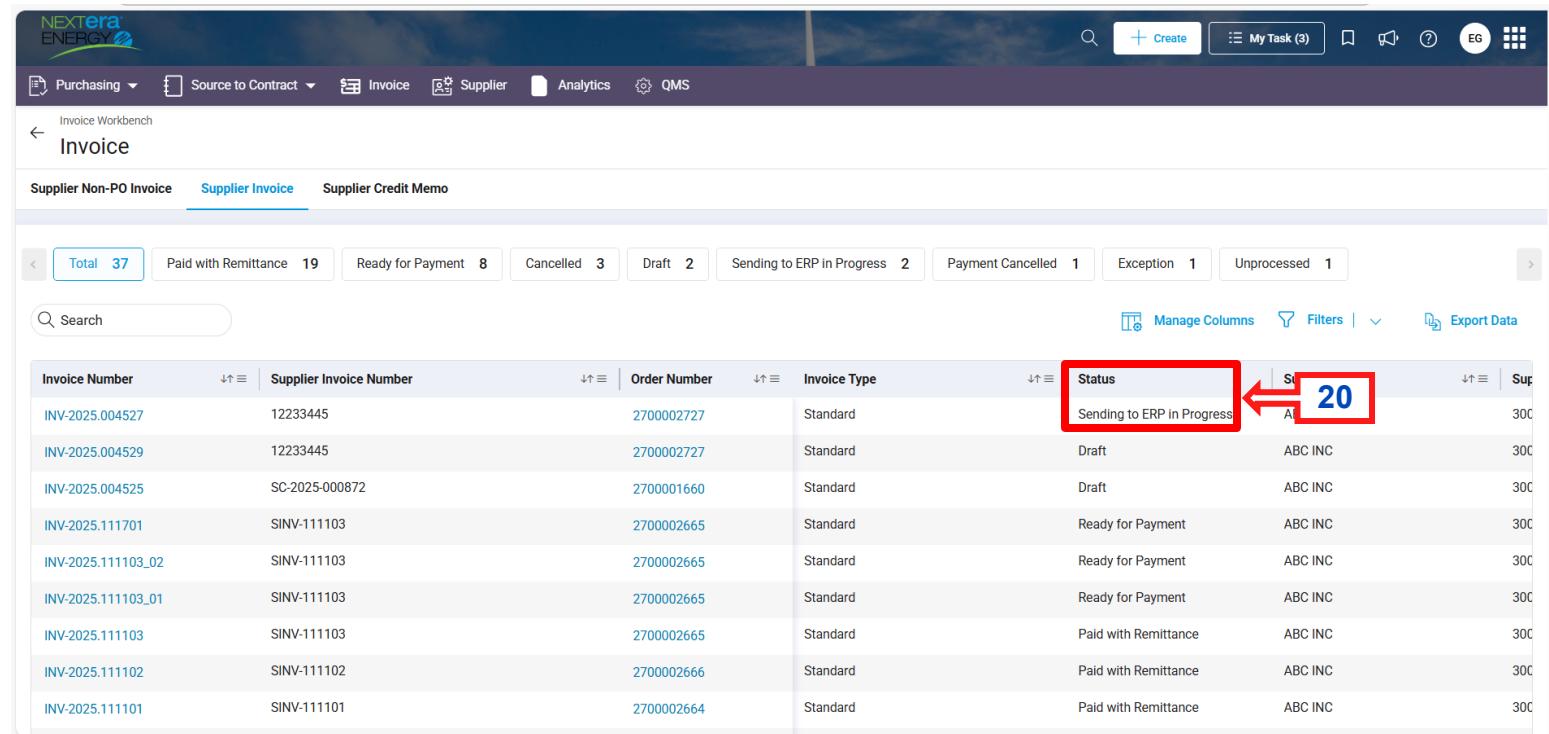
Select Your Purchase Order → **Create your Invoice** → **Invoice Status**

20 The submitted invoice appears with the status **"Sending to ERP in Progress"**.

E- Invoice Status - Supplier

Select Your Purchase Order ➤ Create your Invoice ➤ Invoice Status

Invoice Statuses	Explanation
Unprocessed	The electronic invoice (e-Invoice) has been created and successfully submitted.
In Progress	The e-invoice is not yet approved.
Exception	The e-invoice has an exception error.
Rejected	The e-invoice has been rejected; supplier should send email to AP service desk.
Ready for Payment	The e-invoice will be paid once the payment terms are met.
Paid with Remittance	The invoice has been paid, and remittance details are visible .